SPATIAL TRENDS & IMPLEMENTATION TRACKING

DATA, MONITORING & EVALUATION REPORT

DEPARTMENT: **URBAN PLANNING AND DESIGN**

PERIOD: **JULY 2022 – JUNE 2023**

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Making progress possible. Together.

ACKNOWLEDGEMENTS

Director: Urban Planning and Design (UPD)
Erika Naude

Drafters (UPD M&E team)
Metropolitan Spatial Planning and Growth Management:
Jaco Petzer, Amalia Pugnalin, Annelise de Bruin, Nosiphe Mnyazi, Thandeka Kabeni and Tanya Kieswetter
Spatial Targeting and Mechanisms:
Vernon Moonsamy, Melodie Campbell, Michael Brooke and Jacques Bosenberg

Contributing drafters (District Spatial Planning)
Gert Kruger and Leona Bruiners (Tygerberg and Northern),
Margaret Murcott and Cleo Mazower (Table Bay and Blaauwberg),
Kier Hennessey and Siphilele Mndzebele (Southern and Cape Flats),
Mishka Jalim and Songezo Ndaba (Khayelitsha, Mitchells Plain and Blue Downs and Helderberg)

OP&M Support (Theory of Change and Logic Model)
Zayaan Noordien and Ameen Benjamin

Data contributors
City of Cape Town departments:
Valuations, Environmental Management, Development Management, Urban Planning and Design, Corporate Projects, Programme and Portfolio Management, Human Settlements
Western Cape Government:
Department of Environmental Affairs and Development Planning, Department of Agriculture, Department of Human Settlements

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MONITORING AND EVALUATION FRAMEWORK

CONTENT

INTRODUCTION

Purpose of the report
Data sources, assumptions and limitations
The Logic Model
Monitoring and Evaluation Framework
Terms and definitions

PART 1: SPATIAL TRENDS REPORT

A. URBAN EXTENT

1. Urban footprint and urban extent

B. NATURAL AND AGRICULTURAL ASSETS

1. Biodiversity network
2. Early detection - EIAs
3. Areas of agricultural significance

C. LAND AND BUILDING DEVELOPMENT: RESIDENTIAL, NON-RESIDENTIAL and PROPERTY MARKET ACTIVITY

1. Residential density: within spatial transformation areas
2. Residential density: within spatially targeted areas
3. Formal residential density (metro-wide and district level)
4. Non residential change in land use
5. Diversity of use
    a. Diversity of use (metro-wide and district level)
    b. Diversity and intensity of use
6. Building plan submissions and building work completions
    a. Residential buildings (formal)
    b. Non- residential buildings (retail)
    c. Non- residential buildings (office)
    d. Non- residential buildings (industrial)
7. Property market activity (sales)
8. Change in property value (metro-wide and district level)

D. LAND AND BUILDING DEVELOPMENT: NDAs, AREAS OF INFORMALITY

1. Take-up of new development areas (NDAs)
    a. Residential NDAs
    b. Mixed use NDAs
    c. Non residential NDAs
2. Areas of informality (metro-wide and district level)

E. CASE STUDIES

1. Case studies
    a. Woodstock and Salt Rivier
    b. Blaauwberg Road
    c. Metro Southeast

PART 2: IMPLEMENTATION TRACKING REPORT

F: PUBLIC INVESTMENT: ALIGNMENT OF PUBLIC INVESTMENT TO SPATIAL VISION

1. Government subsidised housing
2. Capital investments: City projects
3. Progress on Urban Restructuring and Upgrading Projects
4. Progress on prioritised Local Area Planning Initiatives (LAPIs)

G: PROGRESS ON THE IMPLEMENTATION OF DEVELOPMENT MECHANISM/ INCENTIVES

PLEASE NOTE:

To navigate to the different sections of the slide deck, please click on the icons illustrated below (when in slide show mode):

The arrow icons on this page will take you to the main section header dividers.

The white circle on the section header dividers will direct you back to this content page.

The circle (with white outline) will take you to the thematic index page.

The icons on the thematic index page will take you to relevant theme and associated indicators.

USER GUIDE

HOW TO INTERPRET THE COMPONENTS OF INFORMATION FOR EACH INDICATOR PANEL

Subheadings further add context to the current subject on panel being shown.

The **indicator** statement provides a short description on what the indicator aims to monitor, as is illustrated by the various components on the panel.

The **data source** shows which information has been used to inform each respective panel.

C.1

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL DENSITY IN RELATION TO THE FOOTPRINT

This indicator shows change in **gross residential density** over time as captured in the City's General Valuation Rolls (**formal dwellings** only) and in the Land Use Model (**formal & informal dwellings)** in relation to the Urban Footprint (2012-2018).

Data Source: Valuations & Urban Planning & Design, City of Cape Town

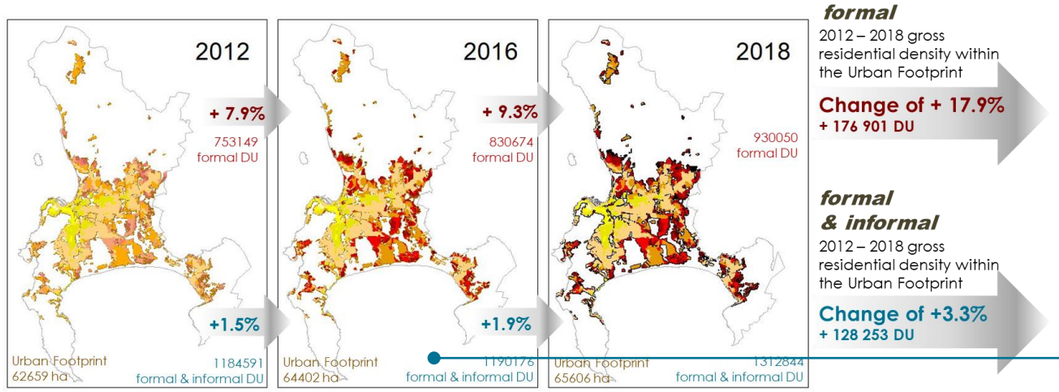
OVERVIEW

Presented here is the gross residential density (**Dwelling Units per hectare (DU/ha)**) relevant to the **Urban Footprint** of City of Cape Town (Map Series C1-a). The Urban Footprint is the land with human-made structures clearly visible on aerial imagery at a scale of 1:30000 (see indicator A1).

Although the methodology used in the General Valuation Rolls remains constant (see indicator C8), the methodology used to generate the Land Use Model was different each year shown. However, at the Metro scale, it is not expected to adversely affect comparisons.

OVERALL TREND

The low, stable residential density figures over time outside of the Urban Footprint and the increasing densification within the Urban Footprint suggest that long-term approaches to contain urban sprawl are working (Graphs C1-a & b).



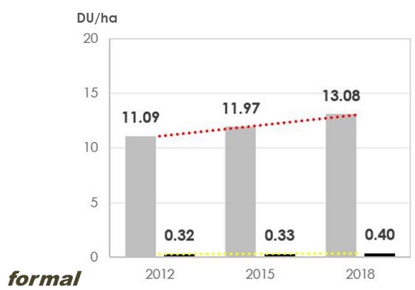
Map Series C1-a: Expansion of the Urban Footprint 2012-2018

SPATIAL TREND (DISTRIBUTION/PATTERNS)

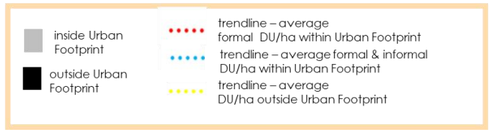
Although the Urban Footprint has grown by almost 3000 ha between 2012 and 2018, the gross *formal* residential density has increased by an average of 2 DU/ha. As more dwellings can be accommodated in this larger extent, it partially explains why the densification rate may not be as high as expected.

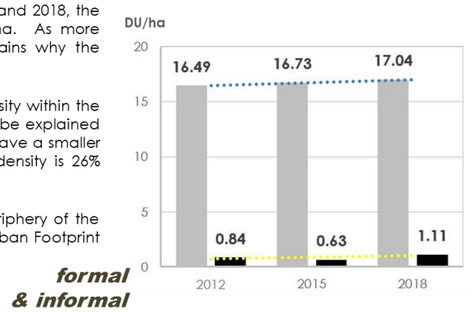
When *formal* & *informal* dwellings are grouped, the rate of increase in density within the Urban Footprint is less steep, an average increase of 0.6 DU/ha. This might be explained by the fact that many *informal* areas are already densely-populated and have a smaller footprint. Overall, when *informal* dwellings are included, the residential density is 26% higher within the Urban Footprint.

As shown in Map Series C1-a, there are increasing densities along the periphery of the Urban Footprint and in the Metro South East. Dwellings found outside the Urban Footprint are more isolated dwellings such as those found on small-holdings.



Graph C1-a: Formal residential density (DU/ha) inside and outside the Urban Footprint 2012-2018





Graph C1-b: Formal & informal residential density (DU/ha) inside and outside the Urban Footprint 2012-2018

Each indicator panel is labelled by a heading, colour and alphanumerical identifiers. Colours correspond with the following themes which can also be seen on page 5:

- A — Urban Extent — Indicators: A1
- B — Natural and Agricultural Assets — Indicators: B1, B2 & B3
- C — Land and Building Development: Residential, Non Residential and Property Market Activity — Indicators: C1, C2 a-b, C3, C4, C5 a-b, C6 a-d, C7 & C8
- D — Land and Building Development: NDAs, Areas of Informality — Indicators: D1 a-c & D2
- E — Case Studies — Indicators: 1a-c
- F — Public Investment: alignment of public investment to spatial vision — Indicators: F1, F2, F3 & F4
- G — Progress on the implementation of development mechanism/incentives — Indicators: G1

Maps, tables and **graphs** follow the alphanumerical labelling system by which the panel is named. Multiple figures of the same type are labelled with the suffix "-a", "-b", "-c" etc.

Each panel provides a spatial interpretation of the trends depicted in the maps, graphs and tables as part of the **overview, overall trend, spatial trend or local level trend** component of the panel.

The **overview** section of the panel provides for elaboration on the purpose for monitoring the relevant indicator and the associated spatial trend.

The **overall trend** section of the panel provides further detail on what the indicator intends to monitor as well as a metro level overview of the spatial trend observed, over a specified timeframe.

The **spatial (and/or local level) trend** component of the panel provides a spatial interpretation of the indicator at a metro or district level, based on the scale of analysis. It also offers more insight as to potential reasons for the spatial trend occurring in identified local areas and over a specified timeframe.

THEMATIC INDEX

A	Urban Extent Indicators: A1
B	Natural and Agricultural Assets Indicators: B1, B2 & B3
C	Land and Building Development: Residential, Non Residential and Property Market Activity Indicators: C1, C2, C3, C4, C5 a-b, C6 a-d, C7 & C8
D	Land and Building Development: NDAs, Areas of Informality Indicators: D1 a-c & D2
E	Case Studies Indicators: 1a-c
F	Public Investment: alignment of public investment to spatial vision Indicators: F1, F2, F3 & F4
G	Progress on the implementation of development mechanism/incentives Indicators: G1

Click the icon to take to you to the relevant theme and associated indicators

INTRODUCTION

- Purpose of the report
- Data sources, assumptions and limitations
- The Logic Model
- Monitoring and evaluation framework
- Definition of key terms

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INTRODUCTION

Purpose of this report

This report provides an overview of land use development trends/patterns and change within Cape Town over time. It forms part of the Monitoring and Evaluation (M&E) framework for the Metropolitan Spatial Development Framework (MSDF) and the eight District Spatial Development Frameworks (DSDFs).

The information presented in this report is used to gauge the impact/influence of the spatial plans in relation to development or growth of the city.

The datasets produced in this report can be used to reflect, compare and monitor land development trends/patterns over time to enable proactive and responsive spatial planning and policy.

Who is the report intended for?

The report is compiled in an accessible format intended for use internally by policy departments to monitor the implementation of the MSDF and DSDFs and other sector departments that deal with spatial infrastructure and budget planning.

The Municipal Planning Tribunal (MPT) can use the information in this report to inform land use decisions. The report will also provide value to anyone working in the built environment (e.g. planning, housing, infrastructure, environmental and engineering fields), and academics, investors, interested and affected parties in the city's urban growth and development.

The composite trends over a five year period will serve as the baseline and status quo analysis to guide the review of all spatial planning policy, thus expediting this phase of spatial policy review.

Methodology

This report portrays enriched land use information and data linked to various indicators that emanate from the MSDF and DSDF policy objectives and guidelines in order to monitor its impact on development. Most of the Data is derived at property (cadastral) level and have been aggregated and analysed at various scales of planning (e.g. metropolitan, district, local areas, precinct or site level) over different time periods to ensure its versatility of use for other purposes.

Data sources, assumptions and limitations

The data used and analysed in this report were sourced from a number of City line departments relevant to the indicator being monitored. This includes, inter alia, the General Valuation Roll, Development Application Management System (DAMS): Building Plans, biodiversity network (BioNet), agricultural areas of significance, new development areas (NDAs), undeveloped and partially developed land Inventory (UPDLI), etc.

While every effort has been made to present the most recent spatial trends, the City's source data used in this report are not reflected in the same year. This is due to the infrequency of data maintenance/updates by sector departments. The data used are based on what was available at the time of the production of this report; however, all indicators show historic trends. Various sources were used to compile this report and references are included in each of the panels.

The limitations of the report

- Availability of data limits the department's ability to report on all spatial policy objectives and guidelines specifically those that apply to the informal economy.
- Infrequent update of source datasets makes it difficult to compare some indicators and associated trends, particularly when attempting to evaluate or justify a particular trend in the same period, i.e. General Valuation Roll vs building plan approvals. The former is updated every three years while the later is updated continuously.

Disclaimer:

The information contained herein is provided for general information only, and is not intended to provide definitive answers and, as such, is only intended to be used as a guide.

Whilst we strive to provide the best information at our disposal and take reasonable measures to ensure that it is up-to-date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability or availability of information for any purpose.

Any reliance you place on the information is at your own risk.

Further information

This report is a product of the Urban Planning and Design Department.
For more information: Email future.capetown@capetown.gov.za

MONITORING AND EVALUATION FRAMEWORK

THEORY OF CHANGE AND LOGIC MODEL

Theory of Change

Assumptions

A: Adequate and consistent financial resources.
B: Strong partnerships with the private and public sector.
C: The district plans are implemented by staff with the necessary expertise and competencies.
D: Partnerships will be effective in facilitating change.
E: There is strong leadership and coordination of resources.
F: Effective public awareness and education around spatial planning issues.
G: There is strong support and recognition of the role of the MSDF at national and local government levels.
H: Service delivery line departments in CCT will implement the projects identified in the DSDF implementation plans within the next 10 years (or during the lifecycle of the DSDF.
I: There is private investment in social facilities.
J: There is continous capacity building for key stakeholders.
K: There is strong spatial planning evidence base to provide a solid foundation for decision-making and policies.
L: There is a robust M&E system to track progress of the MSDF and evaluate outcomes.

Unintended Consequences

I. Existing local businesses have fewer economic opportunities and reduced prospects of growing their businesses if they are not benefitting from the surrounding developments and increased competition.
II. Drafters of implementation mechanisms may overestimate or underestimate the costs and benefits of succeeding in implementing a new mechanism which may lead to negative consequences for residents or the CCT.
III. Areas prioritised for private sector investment (if implemented) can lead to displacement of local communities i.e., gentrification in Woodstock.

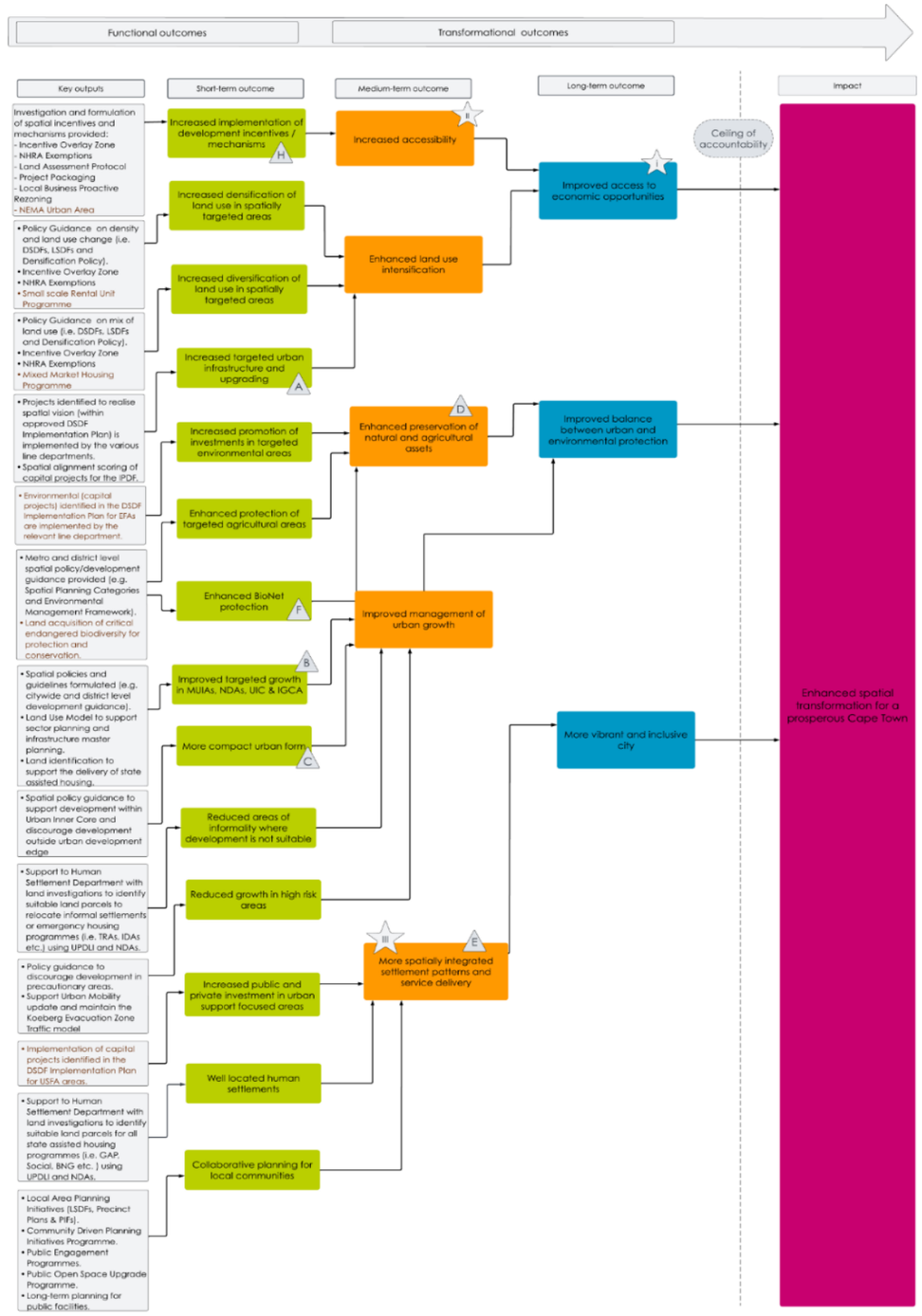
External/Risk factors

- Changes in legislation, policy norms, or standards
- Civil unrest within communities
- Natural disaster risks (Covid-19, drought, fires)
- Trigger points being reached in terms of certain parameters (e.g., air standard quality, water quality standard, and water supply level)
- Changes in political leadership resulting in different priorities and frequent amendments to long-term spatial policy objectives
- Ineffective collaboration and inter-organisation disputes or conflicts
- Inconsistent implementation of policies or delays in implementation
- High levels of staff turnover in mid-level positions in government
- Lack of access to robust data
- Significant changes in population growth through migration into the municipal area
- Sharp fluctuations in commodity prices
- Multiple policies at various scales (i.e., MSDF, DSDF, LSDF etc.) can create onerous administrative requirements to consider when pursuing changes in land use rights in spatially targeted areas. Spatial policies should be seamlessly aligned so that residents or developers use the lowest scale of policy to inform compliance around changes in land use
- Spatial planning policy directives have not matched with the required changes in the zoning scheme and other regulations to enhance the desirability of spatially targeted areas.

Problems/opportunities

- Lack of access to adequate services, social facilities and economic opportunities - a significant concern is a mismatch between the location of job seekers in the residentially dense southeast of the city and the location of jobs in the historic city centre and related areas. For instance, the Khayelitsha, Mitchell's Plain and Greater Blue Downs (KMPBD) District represents some of the most marginalised areas in the city with some of the highest population densities, minimal economic activities, related crime, and safety challenges.
- Many unlawful land occupations have occurred in areas of environmental significance, hazardous locations, infrastructure-related areas, or state-owned land identified for land and housing programmes. Uncontrolled land development can adversely affect natural habitats, cultural landscapes, as well as air and water quality. In addition, it can lead to overcrowding and unsafe building construction.
- There is a need to enhance the protection and preservation of natural assets and biodiversity as it has the potential for economic opportunity.
- There is also a need for more efficient functioning of urban environments. The current congestion pattern supports the need to improve road and rail network connectivity and public transport access to some districts in the city.

Logic Model



Key

- Assumption
- Unintended consequence
- Short-term outcome
- Medium-term outcome
- Long-term outcome
- Impact
- Output dependant on External line deparment & external government entities

Acronyms

CCT	City of Cape Town
DSDF	District Spatial Development Framework
DFA	Development Focus Area
EFA	Environmental Focus Area
IGCA	Incremental Growth & Consolidation Area
IPDF	Infrastructure Planning & Delivery Framework
LSDF	Local Spatial Development Framework
MSDF	Municipal Spatial Development Framework
MUIA	Mixed Use Intensification Area
NDA	New Development Area
NHRA	National Heritage Resources Act
SSRU	Small Scale Rental Units
TRAs	Temporary Relocation Areas
UIC	Urban Inner Core
UPDLI	Underdeveloped and Partially Developed Land Inventory
USFA	Urban Support Focus Area

MONITORING AND EVALUATION FRAMEWORK

REVIEW FRAMEWORK

POLICY INFORMANTS

Guides **WHAT** and **WHERE** development is appropriate

MONITORING

What &Where?

Spatial trends that need to be monitored to understand the extent of development in relation to the SDF objectives.

EVALUATION

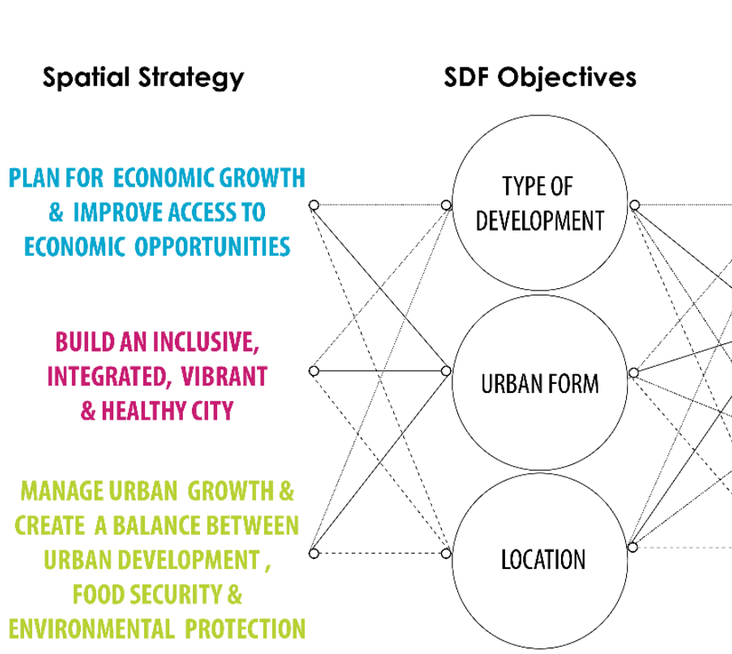
Why?

Braoder indicators that need to be understood in order to justify why spatial trends occur and why spatial policy is successful or unsuccessful in managing development.

REVIEW

How?

Determine how we can improve Spatial Planning Policy to strengthen its success factors and improve its shortcomings in managing development.



Primary Indicators

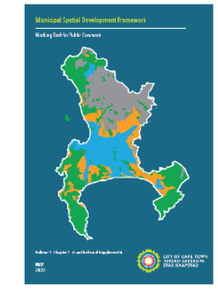
- LAND USE INTENSIFCATION
- SPATIAL LOCATION OF PUBLIC INVESTMENT
- URBAN EXTENT
- NATURAL & AGRICULTURAL ASSETS

OUTPUT:
Spatial Trends & Implementation Tracking Report

Secondary Indicators

- CHANGE IN PROPERTY MARKET
- CHANGE IN THE ECONOMY
- CHANGE IN DEMOGRAPHICS
- INFRASTRUCTURE CAPACITY
- LEVEL OF ACCESSIBILITY
- HUMAN SETTLEMENT PATTERNS
- EFFECTIVENESS OF OR CHANGE IN PROCESS

OUTPUT:
Evaluation Report





OUTPUTS:
Revised MSDF and DSDFs

Figure 1-1a: Overview of the components of the M&E Framework focussing on the monitoring component, based on primary indicators from a spatial planning perspective.

KEY TERMS AND DEFINTIONS

Below is a summary of key terms and definitions used in the report

Areas of agricultural significance (AoAS)
Areas of high potential and unique agricultural land worthy of long-term protection given unique production, cultural and heritage attributes. This includes land that is currently cultivated, has been cultivated within the past 10 years, has the soil potential to be cultivated or be regarded as high-value grazing land, and contributes to food security, irrespective of extent. This can include non-arable land that supports the ecological support system.

Biodiversity network (BioNet)
The map of protected and critical biodiversity areas (including natural vegetation remnants and wetlands) for the city, based on the fine-scale systematic conservation plan, in accordance with the legal requirements. The network of the City's biodiversity areas (prioritised using a scientific and systematic fine-scale conservation planning method, in accordance with the legal requirements). Includes protected areas, open water courses, wetlands and indigenous vegetation.

Critical natural assets (CNA)
Encouraged to retain in a natural state, with a management plan focused on maintaining or improving the state of biodiversity. Any land development permitted within a protected area must be in accordance with an approved management plan, in terms of the National Environment Management: Protected Areas Act (NEM: PAA).

Densification
Increased use of space, both horizontally and vertically, within existing residential areas/properties and new developments, accompanied by an increased number of units and/or population threshold.

Development focus areas (DFAs)
Targeted areas for urban restructuring that have the highest potential spatial transformative impact and where dedicated budget/planning/investment are and should be prioritised to facilitate development.

Discouraged growth area (DGAs)
Discourage land use activities that can be accommodated within the existing urban footprint or the future urban extent (UIC and IGCA) to protect critical agricultural and natural assets; promotion of suitable land uses

Environmental focus areas (EFAs)
Spatially targeted areas with critical environmental significance (in terms of national conservation targets) outside of formally protected areas, which have been identified as priority areas for investment and/or protection in the short to medium term. See priority local facilitation areas (PLFAs).

Incremental growth and consolidation areas (IGCAs)
Diverse and dense land uses encouraged, where bulk engineering infrastructure allows, with incremental intensification (density and diversity) and retention of open space corridors and pockets of agricultural land.

Mixed use intensification areas
These are developed or partially developed areas where further intensification and diversification of existing land uses are supported or where appropriate redevelopment to a mix of land uses is actively encouraged.

New development areas (NDA)
An area earmarked for future development. undeveloped and partially developed land parcels that are suited for future residential or non-residential urban development, which were identified through a technical investigative process for the City's 2040 Land Use Model in order to determine the required supply and quantum of residential and non-residential development to accommodate the projected future growth of population in Cape Town.

Spatial transformation areas
Conceptual planning zones that promote certain land uses in certain locations in order to drive spatial transformation. Spatial transformation is the process of reversing the negative impacts of apartheid spatial planning (spatial fragmentation, inefficient urban form, racial segregation and ghettos of poverty etc.). Integrating communities and increasing opportunities to a greater number of people in highly connected areas are among the key outcomes of spatial transformation.

Urban development edge (UDE)
A demarcated edge line defining the outer limits of urban development for a determined period of time; there are two types of edge lines, namely urban development edge lines and coastal edge lines - the former being a medium- to long-term edge line, where the line has been demarcated in a position to phase urban growth appropriately, or to protect natural resources. The latter being the coastal management line as contemplated in section 25 of the Integrated Coastal Management Act, Act No. 36 of 2014.

Urban extent
Area within urban development edge and outside of coastal edge)

Urban footprint/ built-up/ built area
The total spatial extent of existing urban development

Urban inner core (UIC)
Diverse and dense land uses encouraged in association with current and future public transport infrastructure provision and priority given to spatially targeted interventions.

Urban support focus area (USFAs)
Spatially targeted areas that are faced with a combination of challenges including but not limited to infrastructure failure and service delivery challenges; high socio-economic need and crime rates; and that require a co-ordinated public investment and planning approach in the short to medium term. See priority local facilitation areas (PLFAs).

ABBREVIATIONS AND ACRONYMS

BioNet	Biodiversity Netwok
BNG	Breaking New Ground
BRT	Bus Rapid Transit
CBA	Critical biodiversity area
CBD	Central Business District
CCT	City of Cape Town
CNA	Critical Natural Assets
CEF	Capital expenditure framework
CIF	Capital investment framework
MSDF	Municipal Spatial Development Framework
DAMS	Development Application Management System
DFA	Development Focus Area
DEADP	Department of Environment Affairs and Development Planning
DGA	Discouraged Growth Areas
Du/ha	Dwelling units per hectare
EFA	Environmental Focus Areas
EIA	Environmental Impact Assessment
FLISP	Finance Linked Individual Subsidy Programme
IDA	Incremental Development Areas
IDP	Integrated Development Plan (in terms of the MSA)
IGCA	Incremental Growth and Consolidation Areas as per the MSDF
IHSF	Integrated Human Settlement Framework
IPTN	Integrated Public Transport Network
IOZ	Incentive Overlay Zone
IRDP	Integrated Residential Development Programme
IRT	Integrated Rapid transit IT Information Technology
LAPI	Local Area Planning Initiative
LSDF	Local Spatial Development Framework
LFTEA	Less Formal Townships Establishment Act 113 of 1991
LUM(2040)	Land Use Model (2040)
LUMS	Land use management system
M&E	Monitoring and Evaluation
MPBL	Municipal Planning By Law, 2015 (City of Cape Town)
MPT	Municipal Planning Tribunal
MSA	Municipal Systems Act (No 32 of 2000)
MTIF	Medium Term Infrastructure Framework
MTREF	Medium Term Revenue and Expenditure Framework
MUIA	Mixed Use Intensification Area
MURP	Mayoral Urban Renewal Programme
NDA	New Development Area
NDP	National Development Plan
NEMA	National Environmental Management Act (No 107 of 1998)
NHRA	National Heritage Resources Act (No 25 of 1999)
OP&M	Organisational Performance and Management branch
PGWC	Provincial Government Western Cape
PHA	Philippi Horticultural Area
PHSHDA	Priority Human Settlements Housing Development Area
PIIF	Public Infrastructure Investment Framework
PLFA	Priority Local Facilitation Area
PNE	Protected Natural Environment
POA	Philippi Opportunity Area
POS	Public open space
PPM	Project portfolio management
SANParks	South Africa National Park
DSDF	District Spatial Development Framework
SEZ	Special Economic Zone
SMF	Strategic Management Framework
SSRU	Small scale rental units
SPC	Spatial Planning Category
SPLUMA	Spatial Planning and Land Use management Act
SRA	Special Rating Area
STA	Spatial Transformation Areas
TMNP	Table Mountain National Park
TRA	Temporary Relocation Area
UDE	Urban Development Edge
UPD:	Urban Planning and Design department
UIC	Urban Inner Core
UISP	Upgrade of Informal Settlement Programme
UPDLI	Undeveloped and Partially Developed Land Inventory
USFA	Urban Support Focus Area
WWTW	Waste water treatment works

PART 1: SPATIAL TRENDS REPORT

CITY OF CAPE TOWN
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A : URBAN EXTENT

A1 : Urban footprint and urban extent

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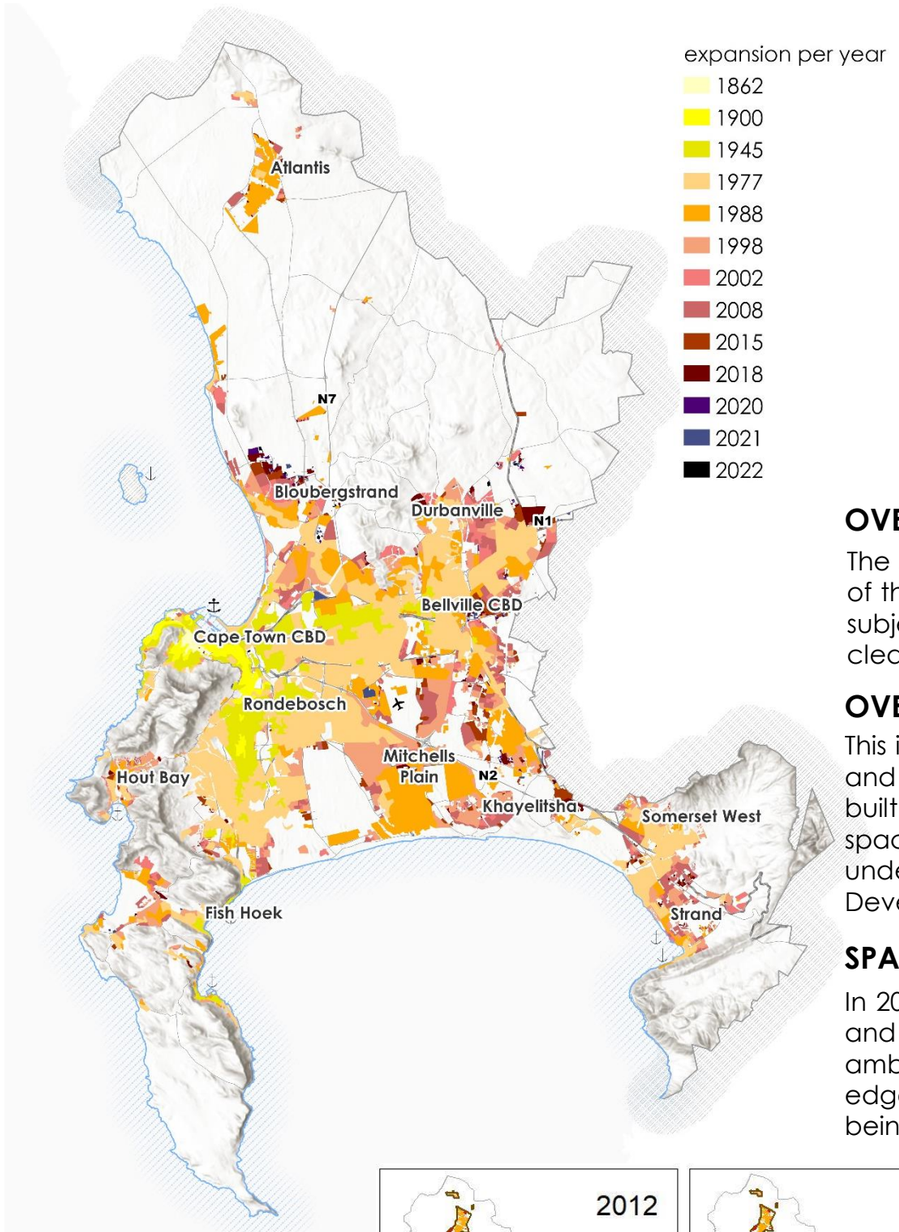
A.1

URBAN EXTENT

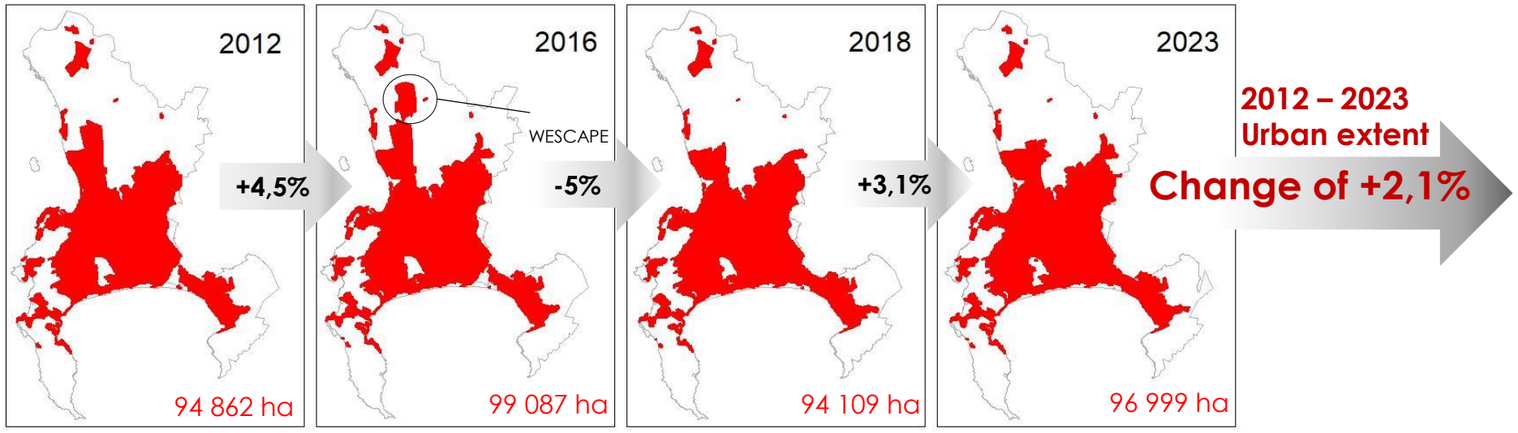
URBAN FOOTPRINT AND URBAN EXTENT

This indicator shows a change in the area of the City's urban footprint (the built environment) and planned urban extent over time (2012-2023).

Data source: Urban Planning & Design Department , City of Cape Town



Map A1-a: Expansion of urban extent per year



Map series A1-a : Area (ha) of planned urban extent – the area within the urban development edge – per year

OVERVIEW

The **urban development edge** (UDE) is a city planning boundary that assists to limit urban sprawl. Land within the UDE and landward of the city's coastal edge is known as the planned **urban extent**. The urban extent includes areas that are undeveloped and that, subject to a detailed site investigation, may be feasible to develop. The **urban footprint** is the land with human-made structures clearly visible on the latest available aerial imagery (Jan 2023) at a scale of 1:30000.

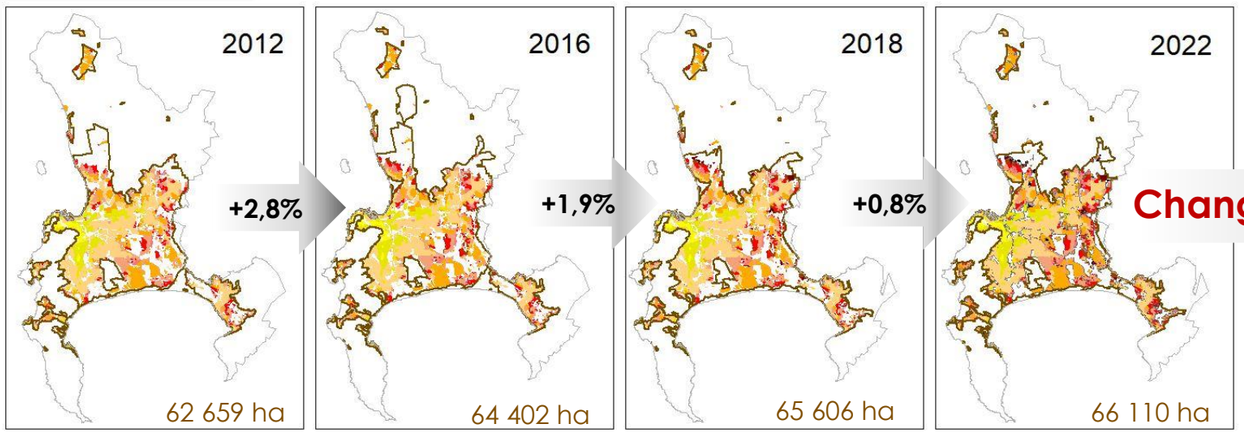
OVERALL TREND

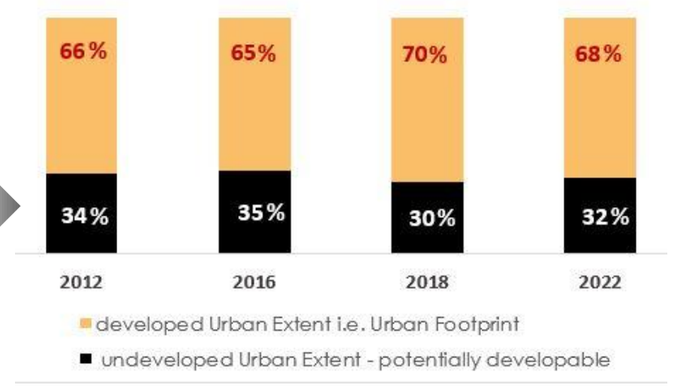
This indicator assists in determining the pace at which land available for development is being consumed and whether City policies and strategies to contain urban sprawl are effective. While the urban extent has generally been contained (Map series A1-a), the built footprint within that extent has increased by roughly 5% between 2012 and 2022 (Map series A1-b). Approximately 68% of the space within the UDE has been developed and 32% undeveloped in 2022 (graph A1-a). Its important to note that not all undeveloped land parcels have development potential, those that do are identified in spatial policy - refer to Indicator D1 – New Development Areas.

SPATIAL TREND (DISTRIBUTION/PATTERN)

In 2016, the urban edge incorporated Wescape to the north, a decision later reversed. In 2018, the urban edge was discontinued and reference to the boundaries of the city was indicated in the MSDF as discouraged growth areas. However, this led to ambiguities and delays in the processing of development applications. In 2023, the edge was reinstated as the urban *development* edge. Most recent urban footprint expansion has been to the north and east of the city where more affordable properties are being made available but this puts significant pressure on the periphery, increasing the risk of sprawl.

Map series A1-b: Area (ha) of urban footprint within the urban development edge per year





Graph A1-a: Percentage undeveloped urban extent remaining per year

A.1

URBAN EXTENT

URBAN FOOTPRINT AND URBAN EXTENT

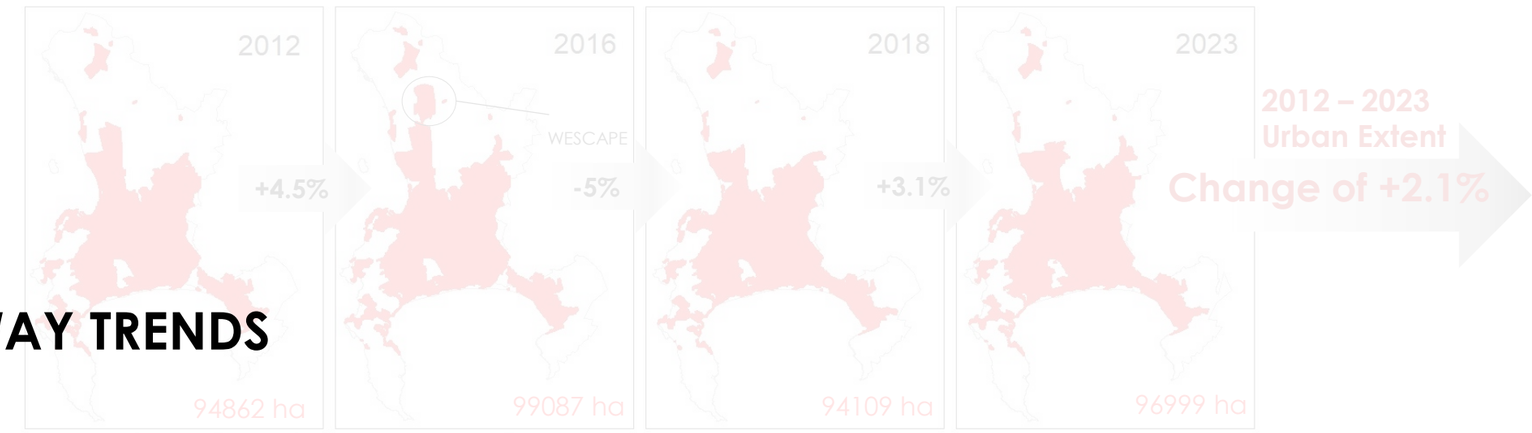
This indicator shows a change in the area of the City's urban footprint (the built environment) and planned urban extent over time (2012-2023).

Data source: Urban Planning & Design Department , City of Cape Town



Map A1-a: Expansion of Urban Extent per year





KEY TAKE-AWAY TRENDS

- **The urban footprint (built extent) grew by 3 451 ha between 2012 and 2022.** This equates to approximately sixteen Century Cities.
- **32% of land inside the urban development edge remains undeveloped**, i.e. urban extent as of 2022.

Map Series A1-b: Area (ha) of Urban Footprint within the Urban Development Edge per year

Graph A1-a: Percentage undeveloped Urban Extent remaining per year

B : NATURAL AND AGRICULTURAL ASSETS

B1 : Biodiversity network
B2 : Early detection - EIAs
B3 : Areas of agricultural significance

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

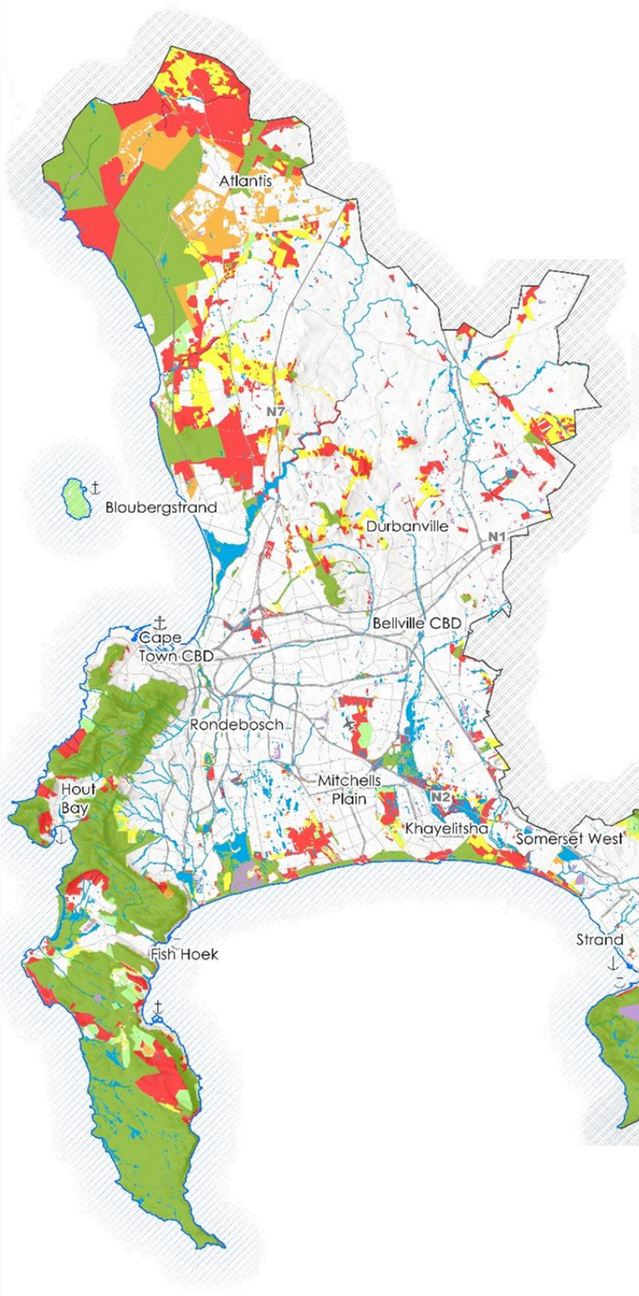
B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

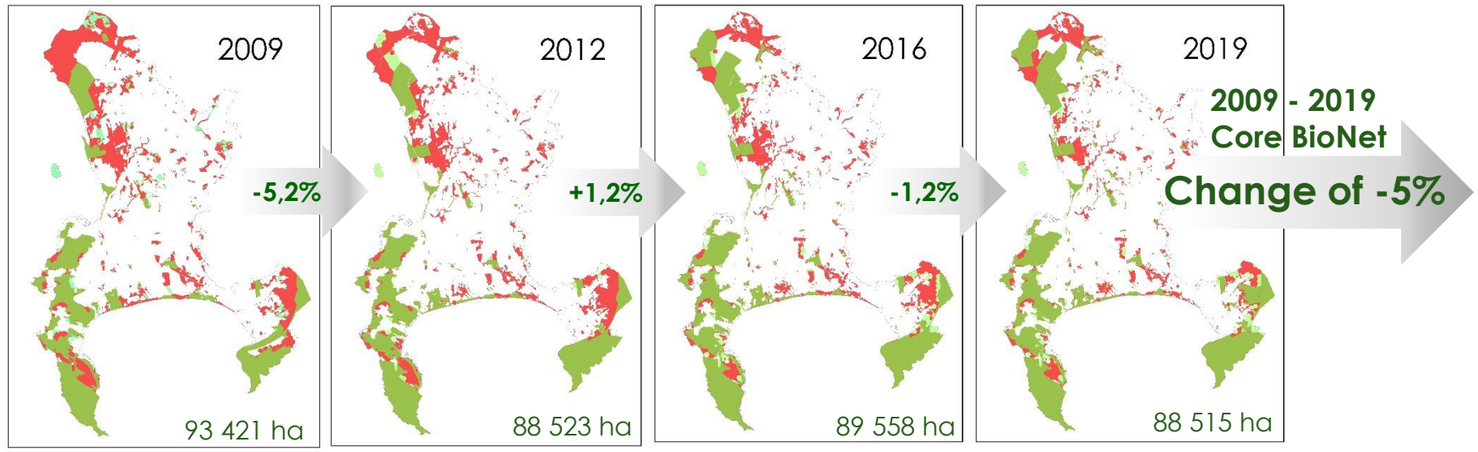
This indicator shows the change in the extent of the terrestrial **biodiversity network** over time (2009-2019), including protected and conservation areas.

Data source: Environmental Management, City of Cape Town





Map B1-a: Terrestrial and aquatic biodiversity network (2019).



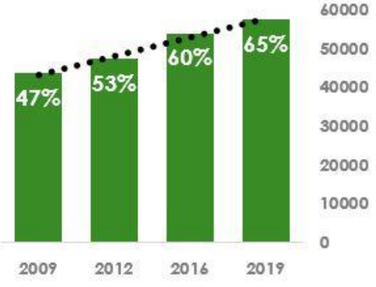
Map series B1-a: Extent (hectares) per year of core biodiversity network i.e. the prioritised remnants of indigenous vegetation.
Note: Only core areas shown above. Biodiversity network buffer 1 and 2 areas not shown above.

OVERVIEW

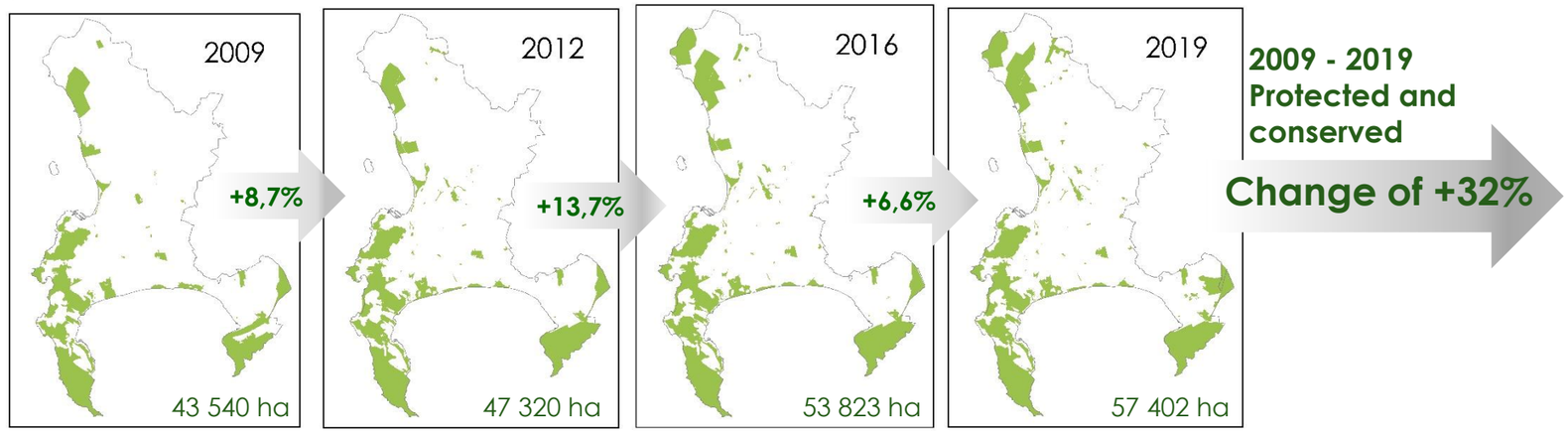
The terrestrial **biodiversity network** (BioNet) is a network of the remaining indigenous vegetation in the city, classified into **critical biodiversity area** (CBA) categories that prioritise the relative importance for conservation of each remnant. The classification is the result of a systematic scientific analysis done periodically that takes into account many factors such as least conflict with other land uses, and presence of threatened species. The aquatic component of the BioNet comprises of the rivers and wetlands. Maintenance of the BioNet is essential to ensure species survival, resilience to climate change and critical ecosystem functioning. Map series B1-a shows the core BioNet areas. These are either protected or conserved areas, or CBAs that are irreplaceable if lost. They are included as **critical natural assets** in the City's Metropolitan Spatial Development Framework.

OVERALL TREND

This indicator monitors the pace at which biodiversity is being lost to other land uses and whether City policies and strategies to protect it are effective. It also investigates the rate at which habitat is being protected via proclamation and/or on-site management. The overall trend is a loss of 5% core BioNet between 2009 and 2019: an area of 4 906 ha. However, there was a 32% increase in the extent of BioNet that is protected and/or conserved (see map series B1-b), which equates to 65% of the Core BioNet (see graph B1-a).



Graph B1-a: Area (ha) and percentage of core biodiversity network that is protected or conserved.



Map series B1-b: Extent (hectares) per year of protected and conserved areas within the biodiversity network.
Note: 2019 area (ha) includes mountainous Table Mountain National Park areas that are managed by SANParks but not yet gazetted.

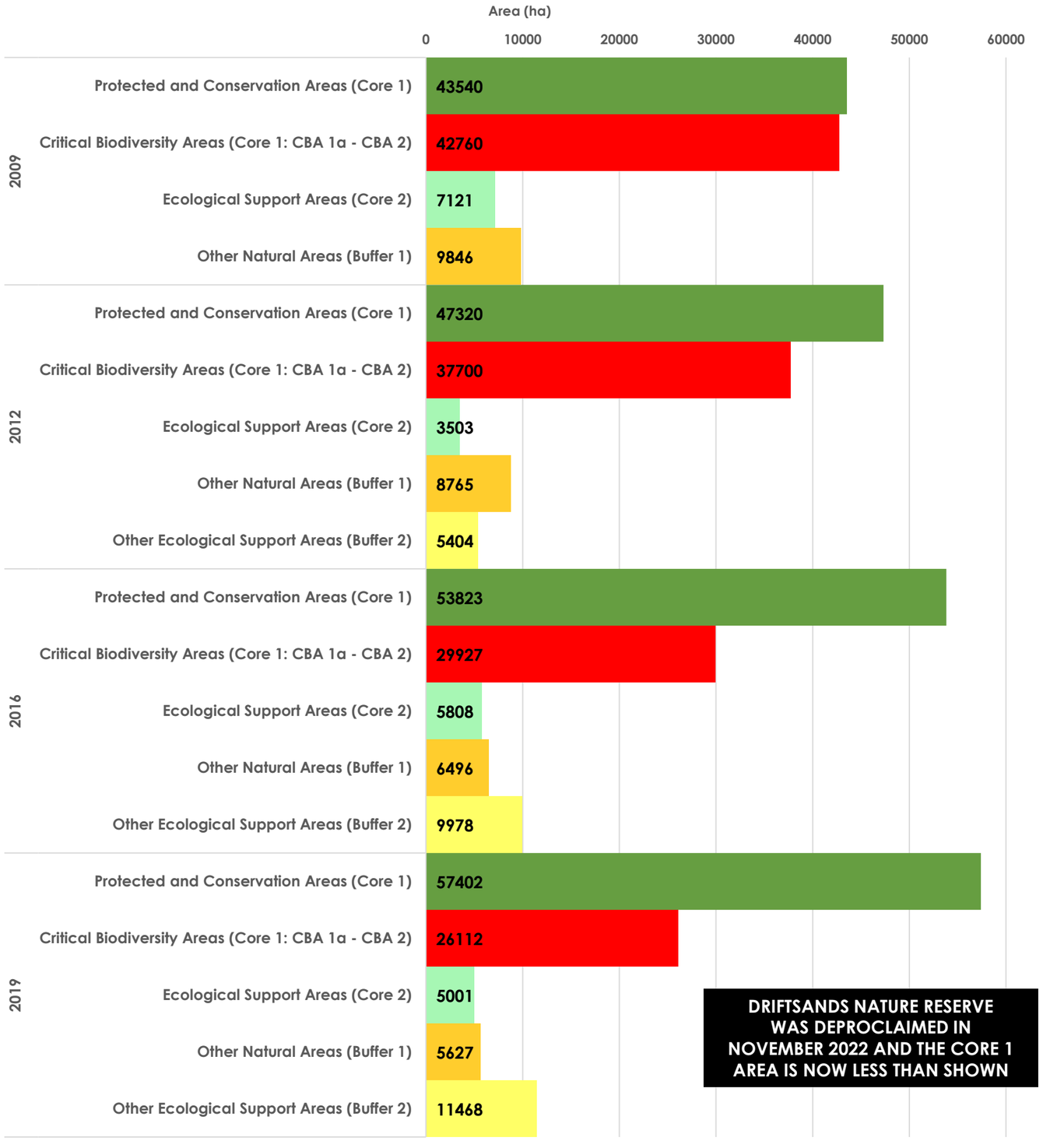
B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

This indicator shows change in the extent of the terrestrial **Biodiversity Network** over time (2009-2019), including protected and conservation areas.

Data source: Environmental Management, City of Cape Town



Graph B1-b: Extent (hectares) per year of total biodiversity network – includes both core & buffer areas
Note: Statistics may vary slightly at times due to different methods of geoprocessing used.

SPATIAL TREND (DISTRIBUTION/PATTERN)

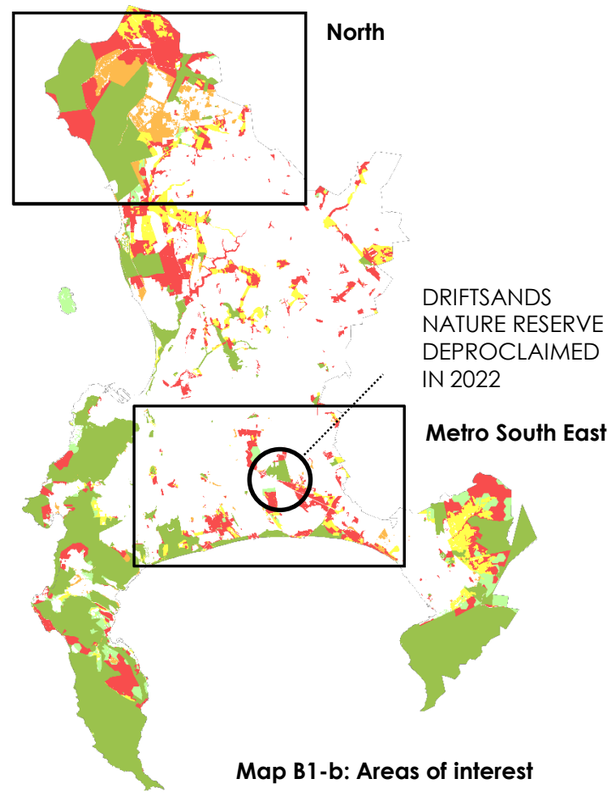
As Graph B1-b shows, there have been significant gains in the proclamation and conservation of the **critical biodiversity areas** (CBAs) of the BioNet. The extent of other natural areas (buffer 1) has almost halved over the period, having been developed or prioritised as core areas in later analyses as options to conserve habitat become limited.

Although the overall area of the total BioNet increased to 105 610 ha in 2019 from 103 267 ha in 2009, the core area and extent of indigenous vegetation remaining has in fact reduced. The protected and conservation area category can include large waterbodies, as well as small developed areas for visitor amenities. Also, the growing other ecological support areas (buffer 2) category is largely agricultural land. The BioNet is therefore not only formed of indigenous vegetation. Fluctuations in area over the years can also be the result of improved data capture.

Map B1-b highlights two areas that have experienced significant change. Since 2009, large areas to the north of the city have been proclaimed, much of which overlay core biosphere reserve and aquifer protection resource zones. These have been supplemented by programs such as the Atlantis Conservation Land Bank.

In the southeast, the **Metro Southeast Strandveld Conservation Implementation Plan** focuses on securing Strandveld vegetation. This is a vegetation type that is found nowhere else in the world, but is also in a region under immense pressure for development. The **Driftsands Nature Reserve**, for example, was deproclaimed in early 2023, heightening the need to protect sufficient Strandveld elsewhere to ensure its survival.

2009 is considered the baseline year of BioNet information, as prior to that, Data is not of a comparable quality. 2012, 2016 and 2019 are years where updates and analysis of the BioNet were done by the Biodiversity Management Branch and detailed statistics are therefore available from this branch to supplement this overview.



Map B1-b: Areas of interest

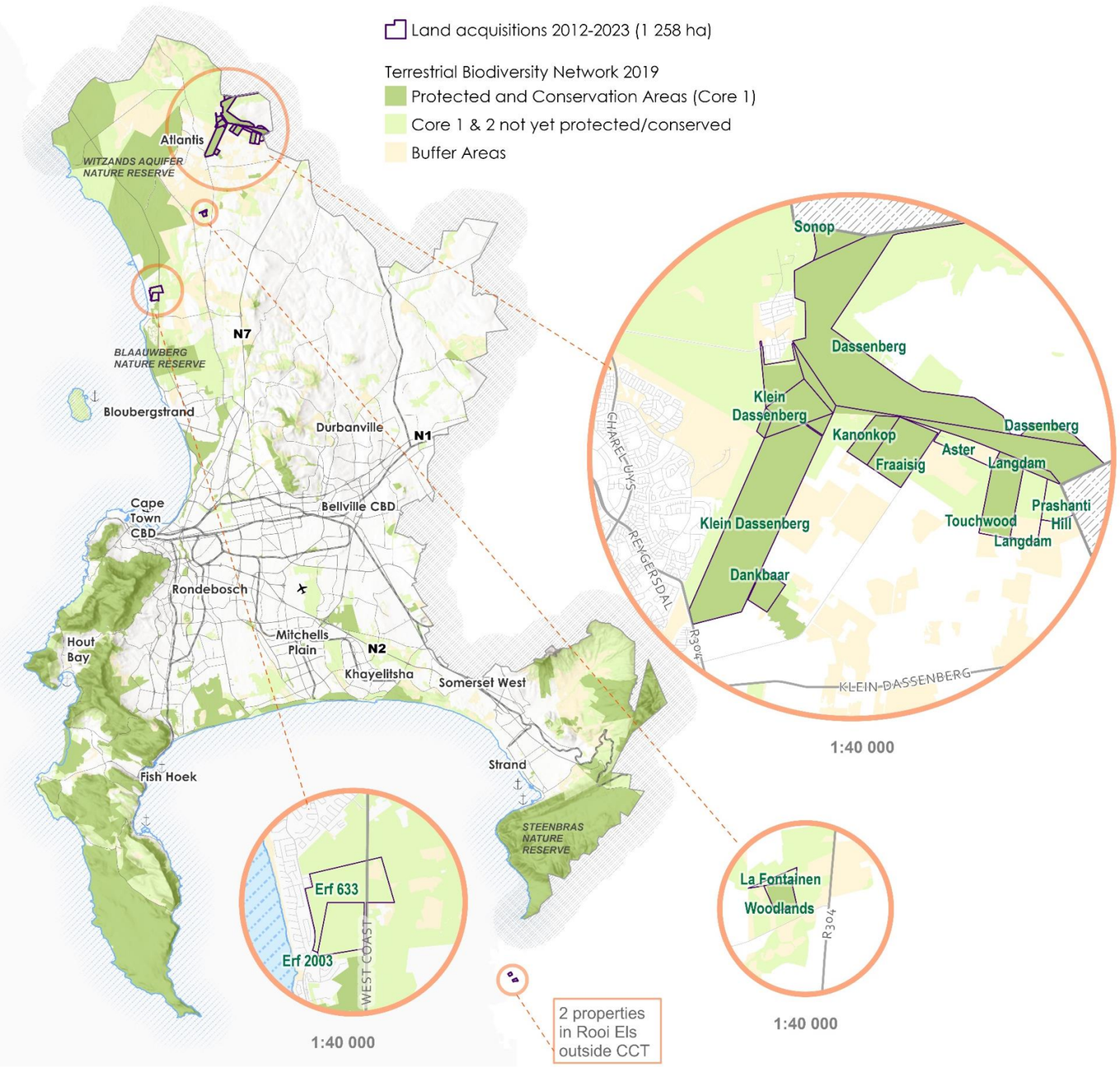
B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

This indicator shows **biodiversity-related land acquisitions** (2012-2022) in relation to the terrestrial **Biodiversity network** (2019)

Data source: Environmental Management, City of Cape Town



Map B1-c:Biodiversity network (2019) with biodiversity-related land acquisitions (2012-2022)

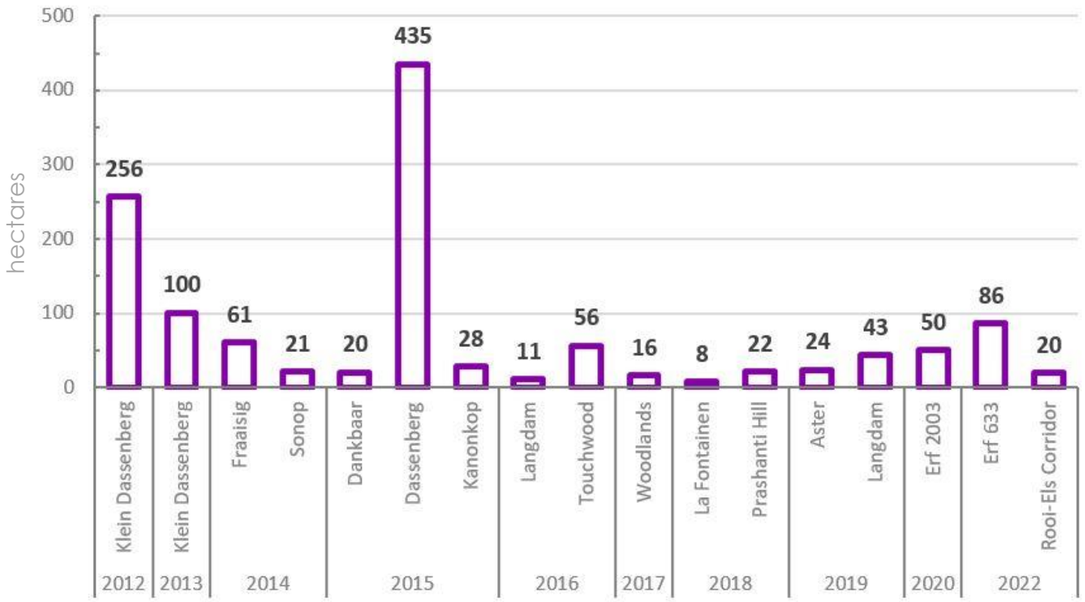
OVERVIEW

The Biodiversity Management Branch in the Environmental Management Department identifies land for the City to purchase to offset the loss of biodiversity network (BioNet) on sites where development is authorised. Where suitable, the proclamation process for these **land acquisitions** is then initiated to protect them into perpetuity and they become part of what- is known as the **conservation land bank**.

Offsets and proclamations are crucial as a certain extent of each vegetation type must be conserved to meet national targets, which are calculated to ensure that sufficient area remains for the survival of the resident species. Because of the high prevalence of endemics and limited habitat remaining, offsets may not always be an alternative.

OVERALL TREND

Between 2012 and mid-2022, 1258 ha of land were purchased by City of Cape Town towards conservation. See map B1-c for an illustration of where these sites are located as well as graph B1-c for a breakdown of hectares acquired per year.



Graph B1-c: Area (hectares) of land acquired for conservation (2012-2022)

SPATIAL TREND (DISTRIBUTION/PATTERN)

The land purchased in 2012-2019 has been the gradual acquisition of contiguous sections in the northeast as well as two erven to the east of Witzands Aquifer Nature Reserve. In 2020 and 2022, two erven that form part of a corridor linking Blaauwberg and Koeberg Nature Reserve were also purchased. Critically endangered indigenous vegetation types found on the purchased land include Atlantis Sand Fynbos and Swartland Granite Renosterveld. In 2022, two erven were purchased outside of City of Cape Town in Rooi Els, south of Steenbras Nature Reserve.

B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

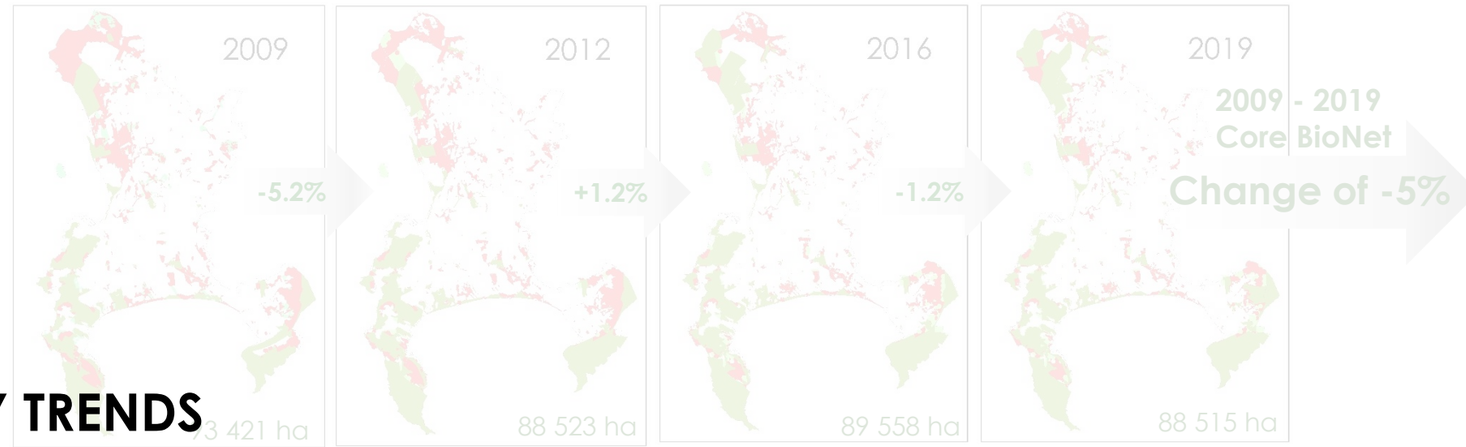
This indicator shows the change in the extent of the terrestrial **biodiversity network** over time (2009-2019), including protected and conservation areas.

Data source: Environmental Management, City of Cape Town



Map B1-a:
Terrestrial and aquatic Biodiversity Network (2019).





Map Series B1-a: Extent (hectares) per year of Core Biodiversity Network i.e. the prioritised remnants of indigenous vegetation.
Note: Only Core areas shown above. Biodiversity Network Buffer 1 & 2 areas not shown above.

KEY TAKE-AWAY TRENDS

- **Overall loss of 5%** of core CBA (protected and unprotected) areas due to EIA approvals, land invasions, etc., between 2009 and 2019.
- **Significant gain of 32%** of protected and conserved biodiversity areas between 2009 and 2019 due to proactive land acquisitions and land banking.

Graph B1-a: Area (ha) & percentage of Core Biodiversity Network that is protected or conserved.

Map Series B1-b: Extent (hectares) per year of protected and conserved areas within the Biodiversity Network.
Note: 2019 area (ha) includes mountainous Table Mountain National Park areas that are managed by SANParks but not yet gazetted.

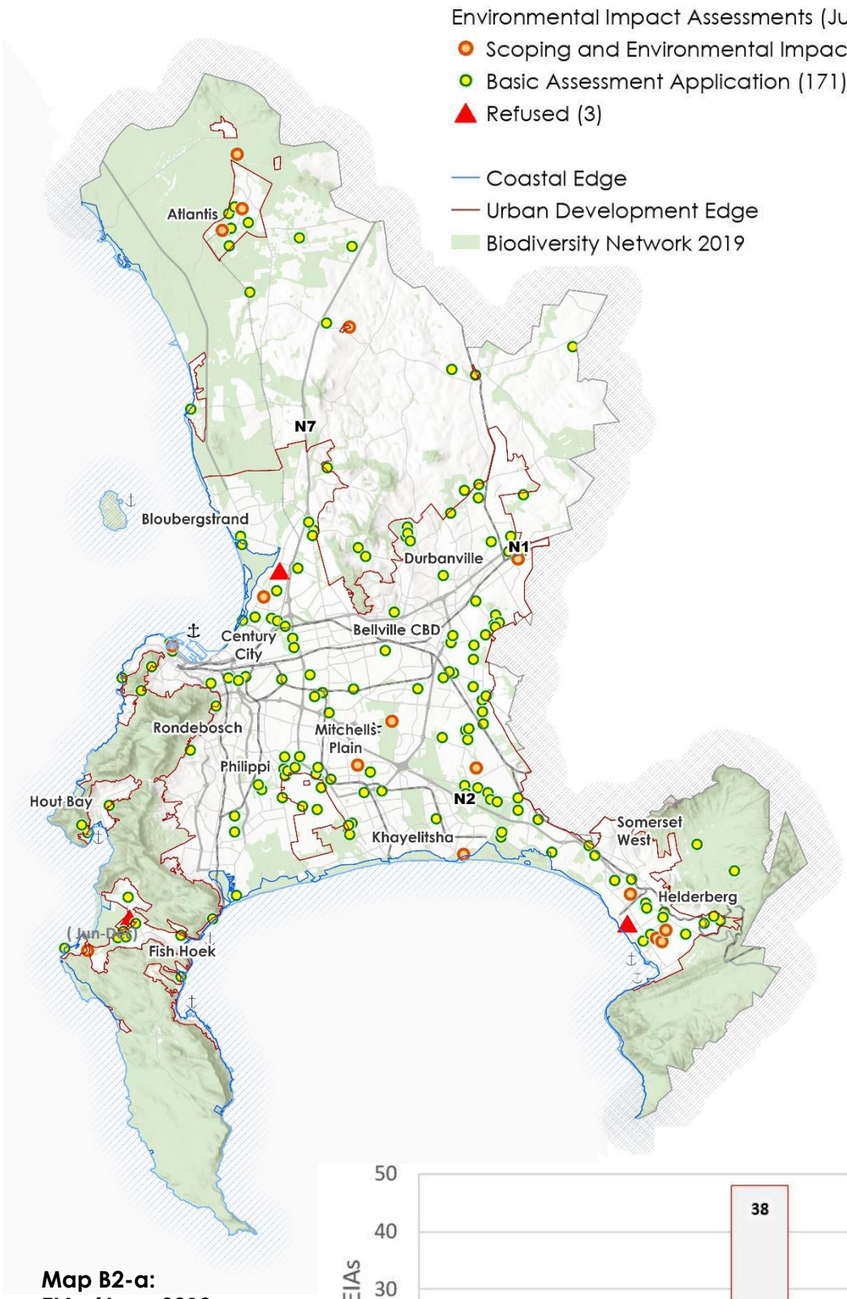
B.2

NATURAL AND AGRICULTURAL ASSETS

EARLY DETECTION - EIAs

This indicator shows the number of **environmental impact assessments** authorised or refused between June 2018 and March 2023, excluding those relating to telecommunication masts and base stations

Data source: Department of Environmental Affairs and Development Planning, WCPG and Environmental Management, City of Cape Town



Map B2-a: EIAs (June 2018 – March 2023) authorised or refused

YEAR	2018 (Jun-Dec)	2019	2020	2021	2022	2023 (Jan-Mar)
Total EIAs authorised	5	27	48	49	50	9
Total EIAs refused	0	0	0	1	1	1

Table B2-a: Total number of EIAs (June 2018 – March 2023) authorised or refused per year

OVERVIEW

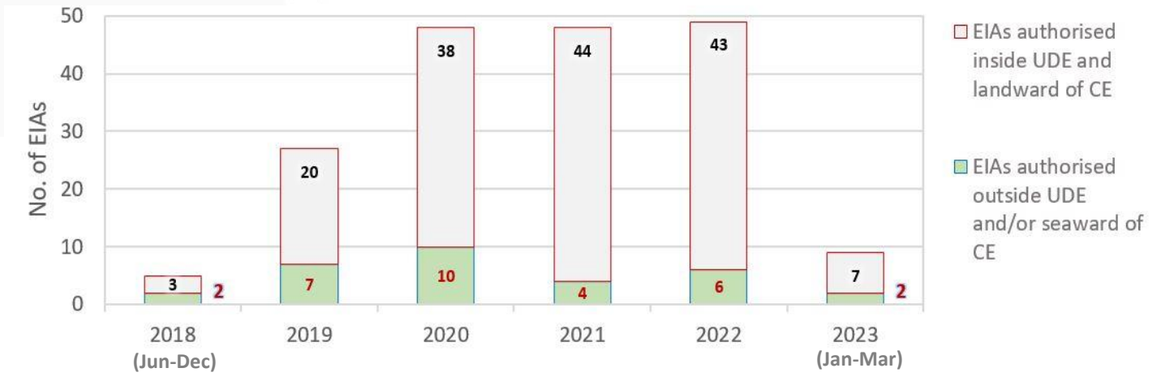
Environmental impact assessments (EIAs) are required in terms of the National Environmental Management Act (NEMA) whenever a proposed development may significantly impact the environment, socio-economic conditions and/or cultural heritage of a site. There are two types. **Basic assessments (BAs)** are conducted when the impact is likely to be confined to the site and protection of the sensitive environment is expected to be manageable. Scoping and **Environmental impact reports (EIRs)** are necessary when the impacts are difficult to predict and may be significant. As part of these processes, mitigation measures are put in place to reduce impacts to acceptable levels and to monitor them.

OVERALL TREND

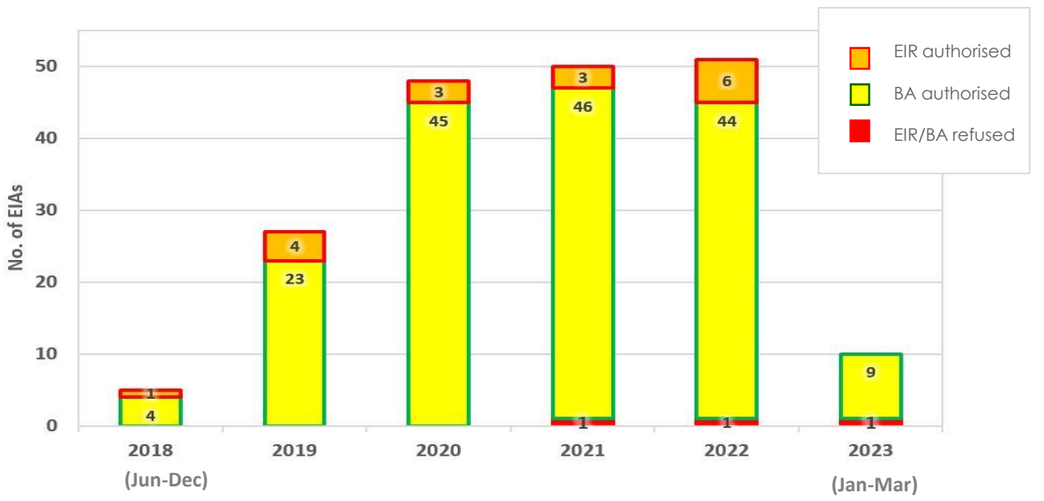
Studying the patterns of EIAs over time helps to determine whether development is sustainable. Three EIAs were refused over this period, and a total of 188 were authorised. Of those authorised, 17 were EIRs. In 2020, despite the pandemic, the number of EIAs authorised almost doubled and has remained constant at almost 50 per year until the end of 2022 (graph B2-b). If City planning policies and strategies are working, the expectation is that authorisations for sites located outside the **urban development edge (UDE)** and/or seaward of the **coastal edge (CE)** will continue to remain low or decrease (graph B2-a). Note that EIAs relating to telecommunication masts and base stations have been excluded from this study as their development has little effect on the land absorption rate.

SPATIAL TREND (DISTRIBUTION/PATTERN)

See map B2-a. Since 2019, a cluster of EIAs were authorised in the north of the city in the Atlantis Industrial Area. This area was recently declared a **special economic zone** and is a priority area for economic development, in particular where related to renewable energy and other green industries. The Helderberg region has had the highest concentration of EIAs, whether evaluating the data over the entire period or only the period since 2019.



Graph B2-a: number of EIAs (BAs + EIRs) authorised (June 2018 – March 2023) inside/outside of the urban development edge (UDE) and/or seaward/landward of the coastal edge (CE)



Graph B2-b: Number of EIAs (BAs vs EIRs) authorised or refused (June 2018 – March 2023)

Other clusters of EIAs authorised were located at Durbanville and Century City, to the east of the city along the boundary, to the north of the Philippi horticultural area and at Mitchells Plain and Khayelitsha near the N2 highway.

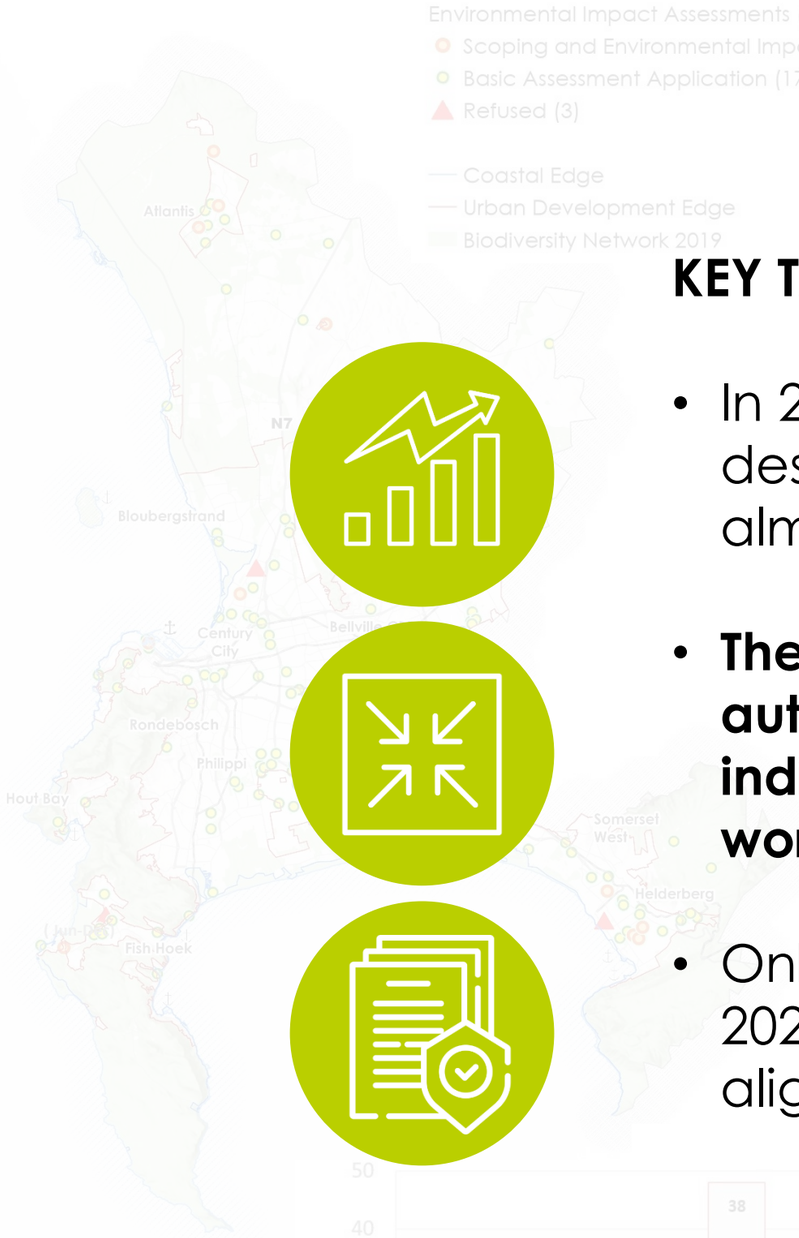
B.2

NATURAL AND AGRICULTURAL ASSETS

EARLY DETECTION - EIAs

This indicator shows the number of **environmental impact assessments** authorised or refused between June 2018 and March 2023, excluding those relating to telecommunication masts and base stations

Data source: Department of Environmental Affairs and Development Planning, WCPG & Environmental Management, City of Cape Town



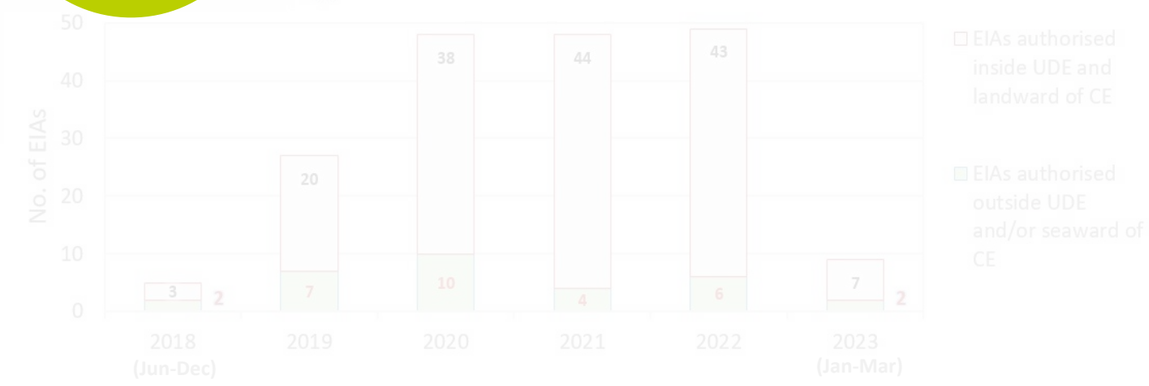
Map B2-a: EIAs (June 2018 – March 2023) authorised or refused

KEY TAKE-AWAY TRENDS

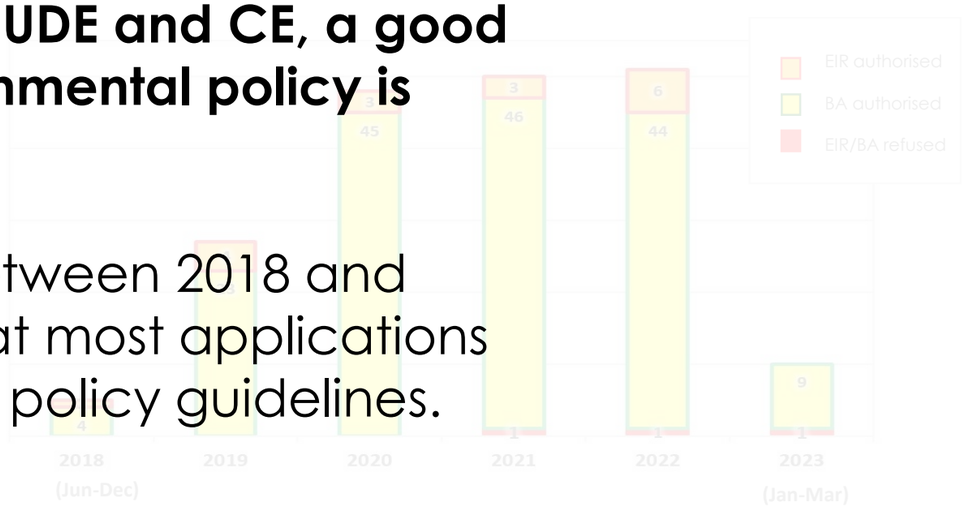
- In 2020, the number of EIAs authorised almost doubled despite the pandemic and has remained constant at almost 50 per year until the end of 2022.
- **The majority of EIA applications that have been authorised are located inside the UDE and CE, a good indication that spatial and environmental policy is working.**
- Only 2% of EIA applications (3) between 2018 and 2023 were refused, suggesting that most applications align with relevant legislative and policy guidelines.

YEAR	2018 (Jun-Dec)	2019	2020	2021	2022	2023 (Jan-Mar)
Total EIA Authorised	5	27	48	49	50	9
Total EIA Refused	0	0	0	1	1	1

Table B2-a: Total no. of EIAs (June 2018 – March 2023) authorised or refused per year



Graph B2-a: No. of EIAs (BAs + EIRs) authorised (June 2018 – March 2023) inside/outside of the Urban Development Edge (UDE) and/or seaward/landward of the Coastal Edge (CE)



Graph B2-b: No. of EIAs (BAs vs EIRs) authorised or refused (June 2018 – March 2023)

Other clusters of EIAs authorised were located at Durbanville and Century City, to the East of the City along the boundary, to the North of the Philippi Horticultural Area and at Mitchells Plain & Khayelitsha near the N2 highway.

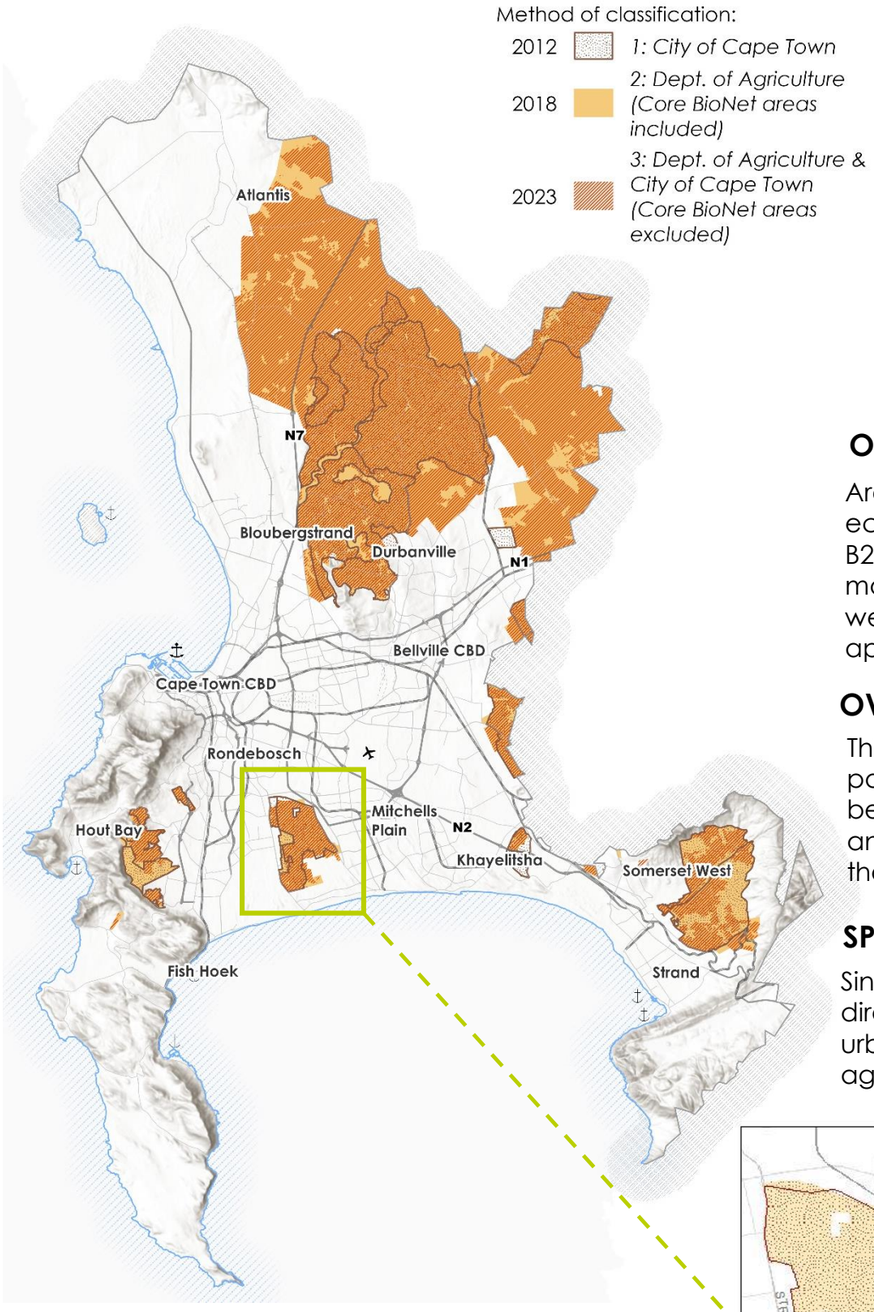
B.3

NATURAL AND AGRICULTURAL ASSETS

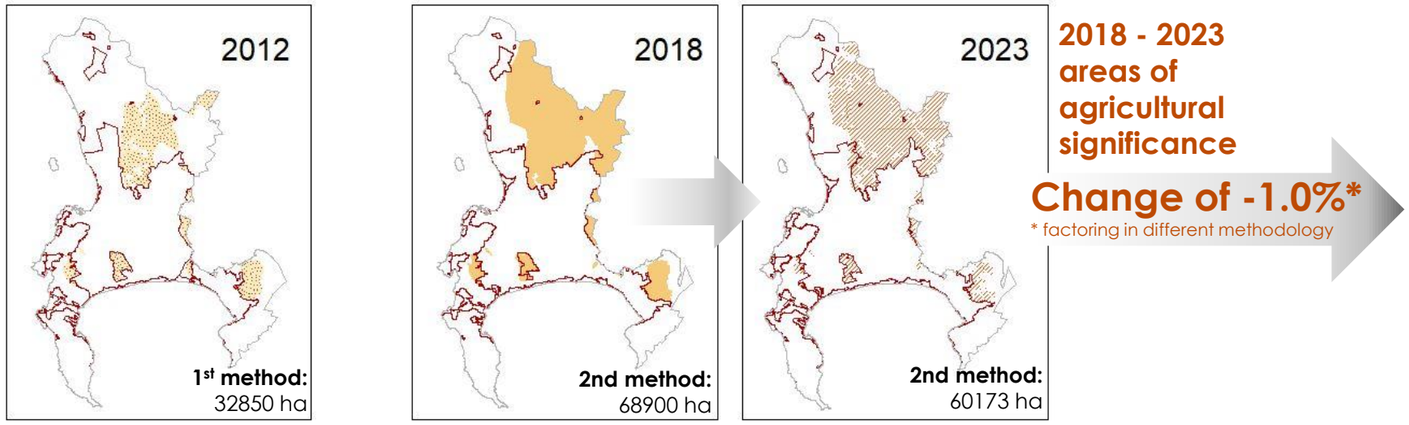
AREAS OF AGRICULTURAL SIGNIFICANCE

This indicator shows a change in the area of agricultural significance over time (2018-2023) with a particular focus on Philippi horticultural area.

Data source: Western Cape Department of Agriculture & Urban Planning & Design, City of Cape Town



Map B2-a: Areas of agricultural significance per year



Map series B2-a: Areas of agricultural significance per year in hectares – with urban development edge

OVERVIEW

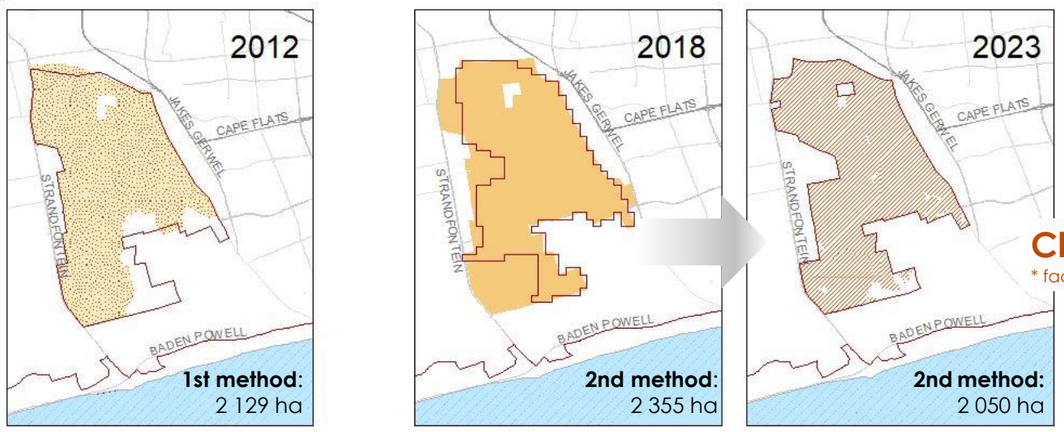
Areas of agricultural significance have unique production, cultural and heritage attributes and are critical for food security and ecosystem function. In 2012, areas of agricultural significance were identified by City of Cape Town based on soil potential only (map B2-a). In 2018, the City and Western Cape Department of Agriculture collaborated with an improved methodology, which was then modified in 2023 by excluding core critical biodiversity areas (see indicator B.1). Maps series B2-a and b show the agricultural areas as well as the urban development edge (UDE), which is a planning boundary demarcated to limit urban sprawl and facilitate suitable applications (see indicator A.1).

OVERALL TREND

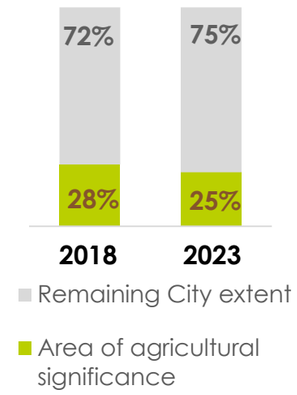
This indicator helps to determine the pace at which agricultural areas are being consumed by other land uses and whether City policies and strategies to preserve them are effective. Roughly 607 ha of the loss and 766 ha of the gain between 2018 and 2023 can be attributed to more refined data capturing methods. Taking this into account, the actual loss of agricultural area between 2018 and 2023 (map series B2-a) was approximately 607 ha, a loss of 1%. The area of agricultural significance currently accounts for 25% of the city extent currently (graph B2-a).

SPATIAL TREND (DISTRIBUTION/PATTERNS)

Since 2018, it is apparent that Durbanville, Helderberg and Philippi farming areas are under development pressure. Special attention is directed to the Philippi horticultural area (PHA), which is an isolated but important area of small-scale farming located within the urban extent (map series B2-b) that also overlays an aquifer protection resource zone. While in general City policies to preserve agricultural areas appear to be working, this is not the case for the PHA where the rate of loss is nine times worse.



Map series B2-b:
Area (hectares) of Philippi horticultural area of agricultural significance per year – with urban development edge



Graph B2-a: Percentage of the City extent per year that is an area of agricultural significance

B.3

NATURAL AND AGRICULTURAL ASSETS

AREAS OF AGRICULTURAL SIGNIFICANCE

This indicator shows a change in the area of agricultural significance over time (2018-2023) with a particular focus on Philippi horticultural area.

Data source: Western Cape Department of Agriculture & Urban Planning & Design, City of Cape Town



Map B2-a: Areas of agricultural significance per year

Map Series B2-b: Areas of agricultural significance per year – with Urban Development Edge

KEY TAKE-AWAY TRENDS

- **Minimal loss of 1%** of areas of agricultural significance between 2018 and 2023
- **Peri-urban development pressure** on the edges, especially in the Durbanville, Helderberg and Philippi areas **with the Philippi horticultural area experiencing a much greater rate of loss than the average for the city**.

Map Series B2-b: Area (hectares) of Philippi Horticultural Area of agricultural significance per year – with Urban Development Edge

Graph B2-a: Percentage of the City extent per year that is area of agricultural significance

C : LAND AND BUILDING DEVELOPMENT

RESIDENTIAL, NON RESIDENTIAL AND PROPERTY MARKET ACTIVITY

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

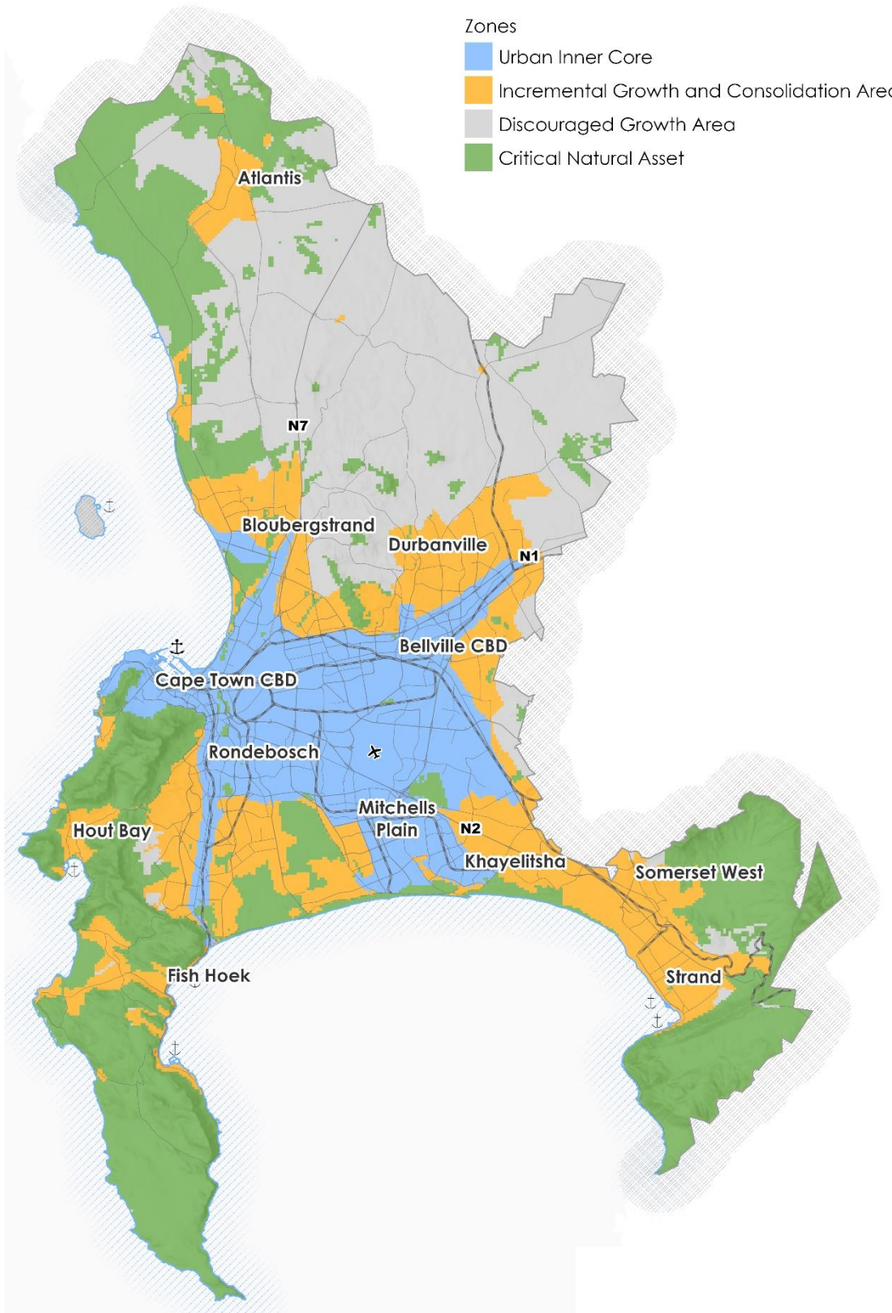
C.1

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL DENSITY WITHIN SPATIAL TRANSFORMATION AREAS

This indicator shows the **gross residential density** (2018) as captured in the Land Use Model of **formal and informal units** and in the General Valuation Roll (**formal only**) within the 2018 spatial transformation areas.

Data source: Valuations and Urban Planning and Design, City of Cape Town



Map C2a-a: Spatial transformation areas

OVERVIEW

The **spatial transformation areas** (STAs) are designed to promote an efficient urban form and access to equal opportunities for all citizens, thus working to reverse apartheid era spatial planning. They are divided into four zones (map C2a-a) with suitable land uses promoted within each. Residential development is encouraged within the **urban inner core** (UIC) and **incremental growth & consolidation areas** (IGCA). Residential development is discouraged outside of the UDE in the **discouraged growth areas** (DGAs) largely agricultural areas - and where there are **critical natural assets** (CNAs). Density is calculated as **dwelling unit per hectares (du/ha).**

OVERALL TREND

This study of the 2018 residential density per zone is a baseline study for later comparison with more recent residential density statistics (when they become available) to understand whether City policies and strategies to shape the City's growth and that contain urban sprawl are effective. Residential density is highest in the zones designated for residential and use - UIC and IGCA – and very low in the zones designated for other land uses DGA and CNA. When informal residential dwellings are included, densities are significantly higher.

SPATIAL TREND (DISTRIBUTION/PATTERNS)

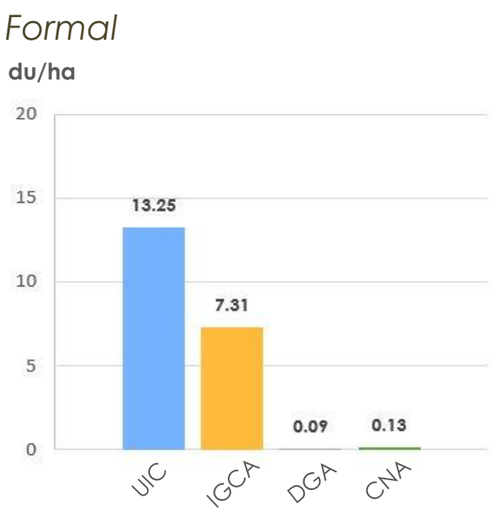
Over the years, the city naturally expanded outwards from the harbour along the major road and railway routes, with the shape moulded by mountainous areas, the ocean and vleis. However, apartheid then altered this pattern by shifting targeted communities from well-located neighbourhoods to the city's outskirts, exacerbating urban sprawl, often to areas devoid of resources. When more recent residential density data become available, the spatial pattern over time will be studied.

"Future Proof" and upscale blue

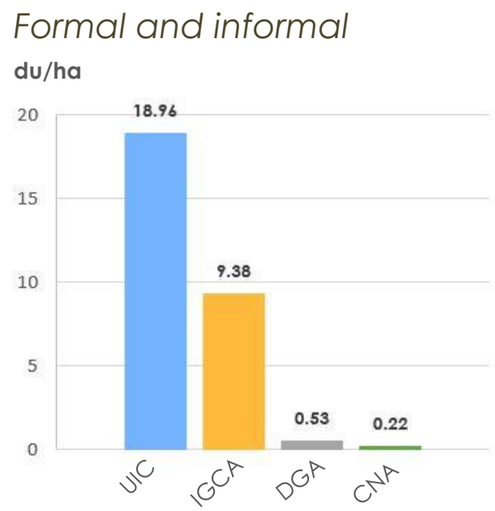
"Fix" and maintain orange

"Enhance" green

"Avoid" grey



Graph C2a-a: Gross formal residential density (dwelling units per hectare) per 2018 spatial transformation area zone



Graph C2a-b: Gross formal and informal residential density (dwelling units per hectare) per 2018 spatial transformation area zone

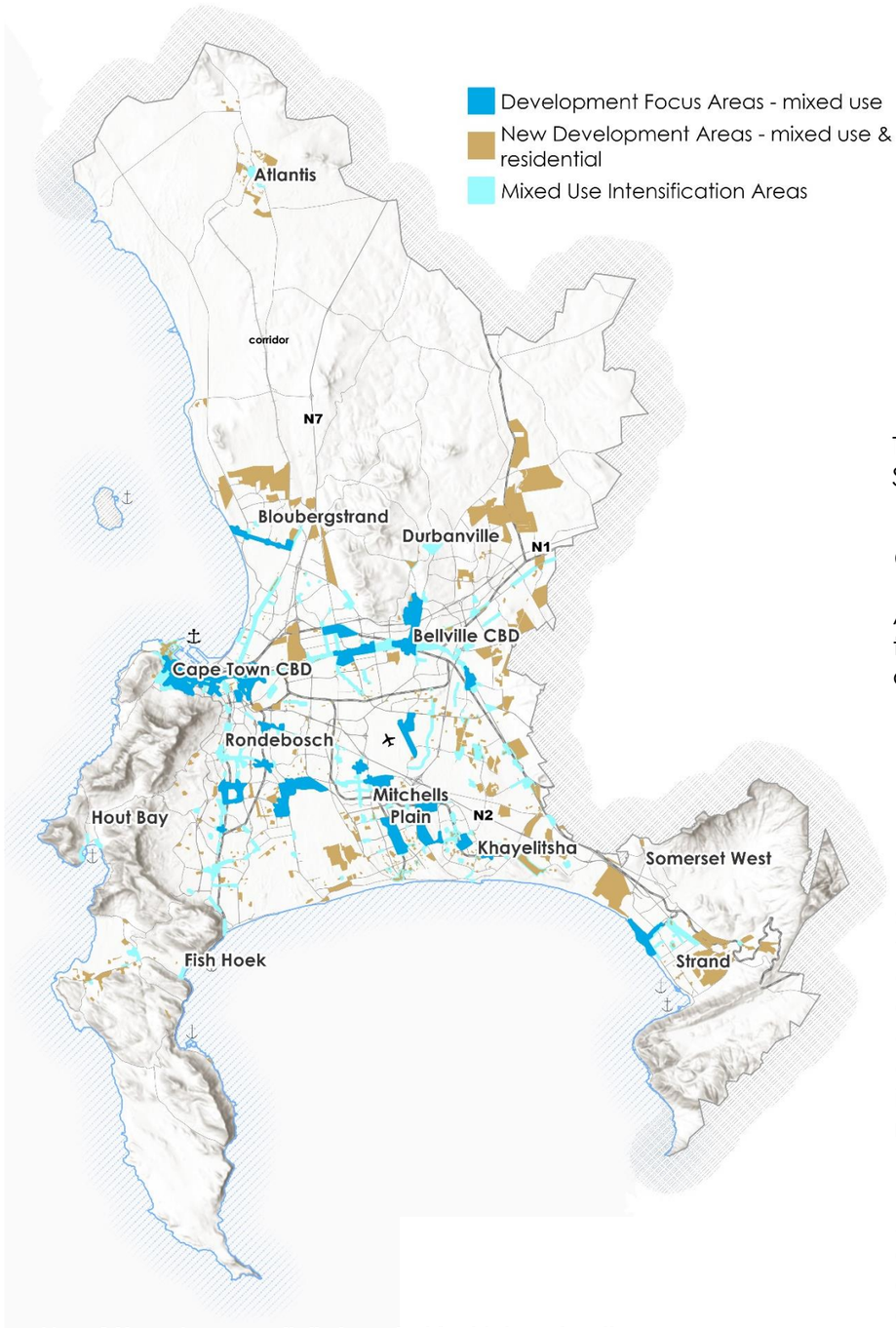
C.2

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL DENSITY WITHIN SPATIALLY TARGETED AREAS

This indicator shows the **gross residential density** (2018) as captured in the Land Use Model (**formal and informal units**) and in the General Valuation Roll (**formal only**) within areas spatially targeted for development in 2023. Informal areas include Informal additional dwellings.

Data Source: Valuations & Urban Planning & Design Department, CCT



Map C2b-a: Areas spatially targeted for higher density residential development

OVERVIEW

The 2023 District Spatial Development Frameworks target particular areas for development, known collectively as the "**spatially targeted areas**" (map C2b-a). They include the following spatial planning categories (SPCs) where policy would currently support residential development:

- **Development focus areas (DFAs) designated for mixed use**.
- **New development areas (NDAs) designated for residential & mixed use**.
- **Mixed-use intensification Areas (MUIAs)**.

The gross density shown, measured as **dwelling units per hectare (du/ha)**, is cumulative for all areas designated within each SPC across the entire city.

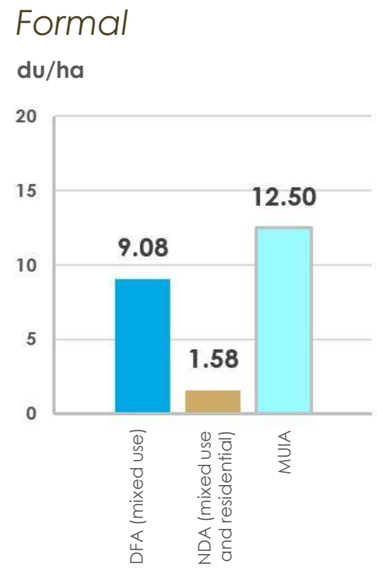
OVERALL TREND

Although the residential density data is from 2018 and the spatially targeted areas were only delineated in 2023, it is useful to understand the 2018 statistics for later comparison with more recent residential density statistics (when they become available) to understand whether programmes to increase densities in these areas are effective.

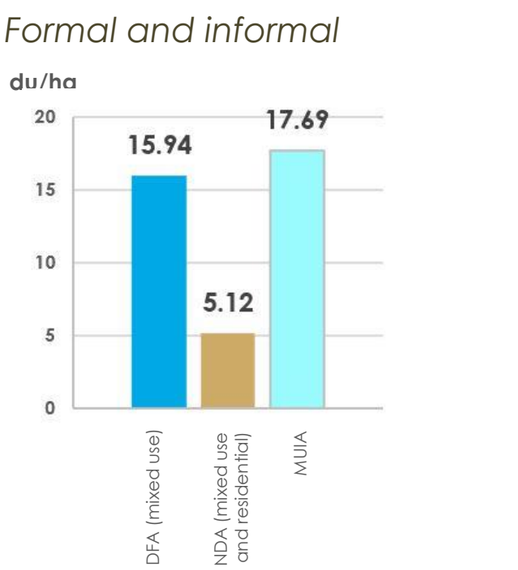
SPATIAL TREND (DISTRIBUTION/PATTERNS)

NDAs are selected as largely vacant sites but as per the graphs above, there is some low density residential development present. This is the result of land invasion as formal development has not yet commenced. As per the graphs, there is currently a higher density of informal residential units in the MUIAs and the DFAs.

MUIA boundaries were found to overlap NDA boundaries so these overlaps have been removed for this analysis as they were distorting the results. The preparation of the indicator data for analysis is therefore also guiding the planners on how to more accurately delineate boundaries and categorise SPCs in future.



Graph C2b-a: 2018 residential density (formal) within 2023 spatially targeted areas



Graph C2b-b: 2018 residential density (formal and informal) within 2023 spatially targeted areas

C.2 b

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL DENSITY WITHIN SPATIALLY TARGETED AREAS

This indicator shows the **gross residential density** (2018) as captured in the Land Use Model (**formal and informal units**) and in the General Valuation Roll (**formal only**) within areas spatially targeted for development in 2023. Informal areas include Informal additional dwellings.

Data Source: Valuations & Urban Planning & Design Department, CCT

KEY TAKE-AWAY TRENDS:

- This is a baseline study for 2018 that will be compared with more recent data when it becomes available.
- **Inside targeted STAs is preferred:** Residential density is highest in the zones designated for residential use – UIC and IGCA – and very low in the zones designated for other land uses – DGA and CAN.
- Formal and informal **residential densities in the Urban inner core are double that of the incremental growth and consolidation areas,** indicating that there is indeed opportunity for further densification.

Map C2b-a: Areas spatially targeted for higher density residential development

Graph C2b-a: 2018 residential density (formal) within 2023 spatially targeted areas

Graph C2b-b: 2018 residential density (formal & informal) within 2023 spatially targeted areas

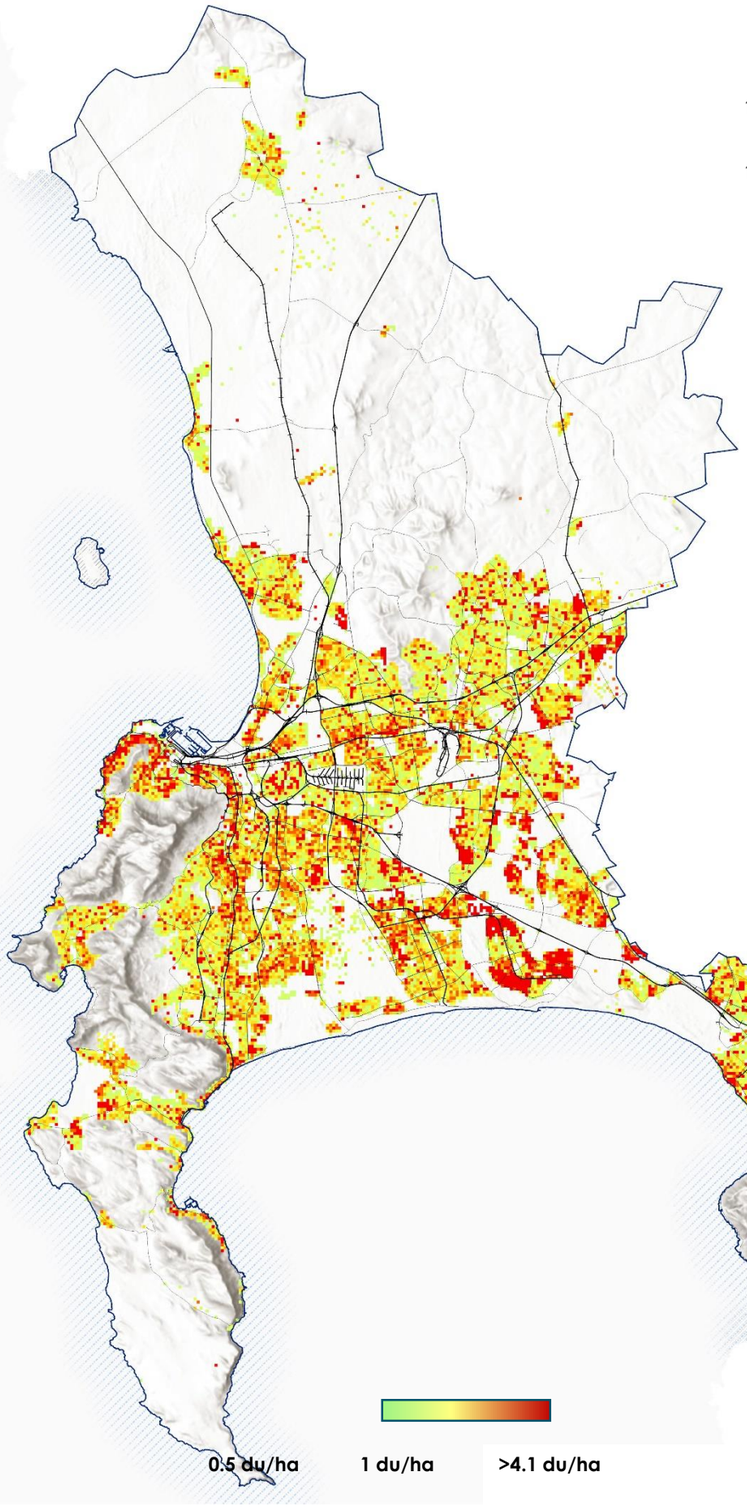
C.3

LAND AND BUILDING DEVELOPMENT

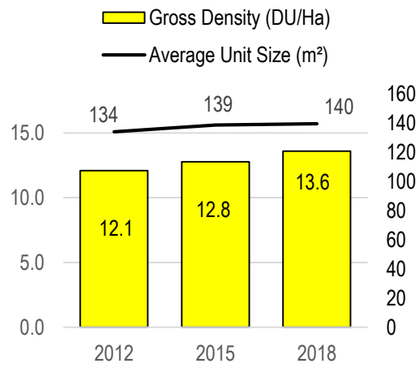
FORMAL RESIDENTIAL DENSITY (METRO-WIDE)

This indicator shows change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4ha (200m x 200m) grid cells.
Unit size calculation: total habitable floor area/total number of units

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C3-a: Change in gross residential density (2012 to 2018).



Graph C3-a: Overall average dwelling extent and gross density (formal only).

OVERALL TREND

Densification is observed almost everywhere in the city. It occurs in different forms and at varying densities in different areas.

SPATIAL TREND (DISTRIBUTION/PATTERN)

The rate of densification is faster in some areas, and can be ascribed to limited resources (space, housing, infrastructure and money) and policy incentives that aim to optimise the use of resources (including travelling time and transport cost). Densification in the city is largely driven by the private sector, including the less formal and informal sectors. Trends observed from the maps depicted in this report include:

- The largest increase in gross residential density between 2012 and 2018 occurred in the in the Metro South East, and recorded the highest densities (other than the CBD) as of 2018.
- Other significant increases in density between 2012 and 2018 occurred in key development corridors (mainly the Metro Southeast, Southern Corridor, Voortrekker Road and Blaauwberg Road) and nodes (CBD, Wynberg-Kenilworth-Claremont, Khayelitsha CBD, Kraaifontein CBD and Somerset West CBD).

GENERAL ANALYSIS

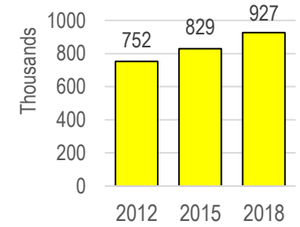
Map C3-b shows the 2018 residential density of formal dwellings (expressed in dwelling units per hectare or DU/ha), i.e. the spatial distribution of dwelling units.

Map C3-a on the left shows the difference in gross residential density (du/ha) between 2012 and 2018, in other words where densification has taken place to arrive at the density depicted on map C2-b.

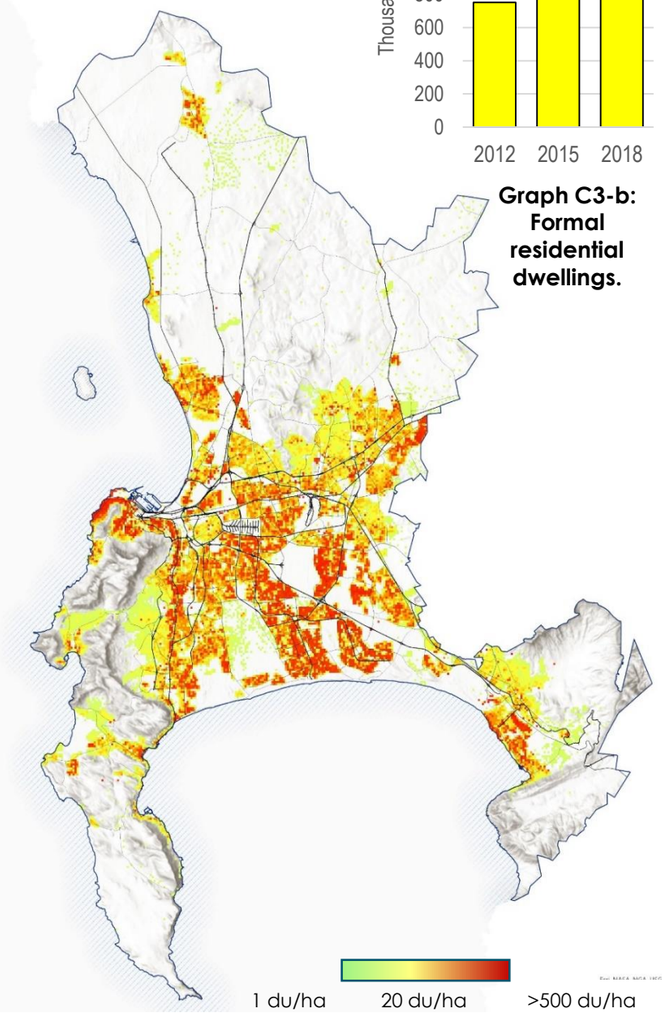
The number of formal residential dwellings increased from ± 752 000 in 2012 to ± 829 000 in 2015 and ± 927 000 in 2018 (see graph C3-b). It is of interest to note that the average unit size increased slightly from 101m² to 106m² and that the gross density exhibits a clear increase across the city (see graph C3-a).

When this is taken into consideration together with the overall city-wide increase in density, it points to the fact that densification manifests differently in different areas. Areas exhibiting notable densification over the last few years include the metro south-east, inner city areas, the Helderberg area, and locations along development corridors.

Refer to the case studies for more details.



Graph C3-b: Formal residential dwellings.



Map C3-b: Gross residential density (2018).

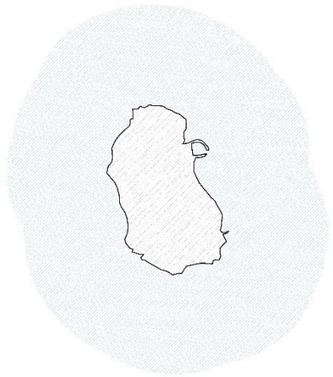
C.3

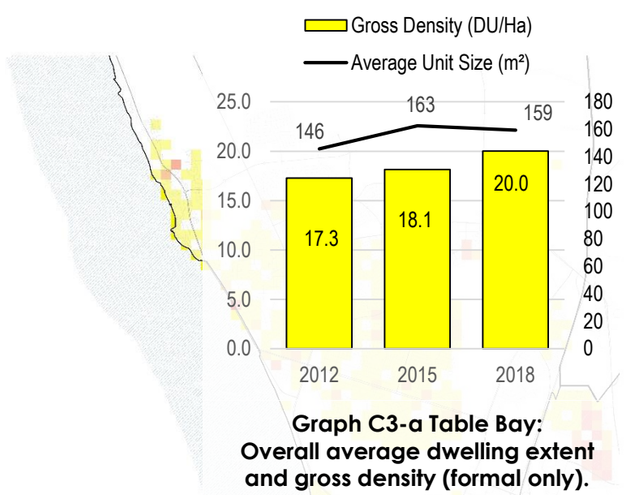
LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

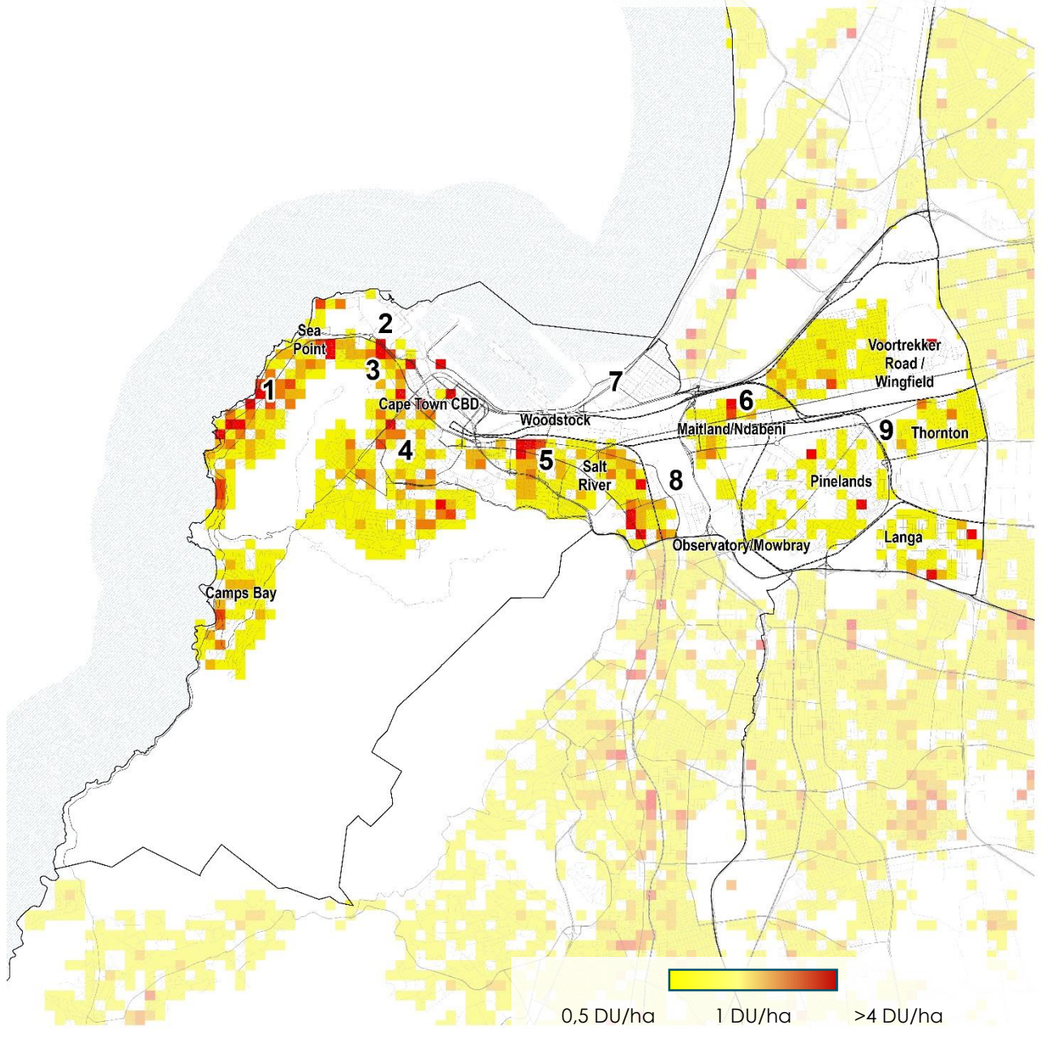
This indicator shows a change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018





Graph C3-a Table Bay: Overall average dwelling extent and gross density (formal only).



Map C3-a: Change in gross residential density (2012 to 2018).

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)

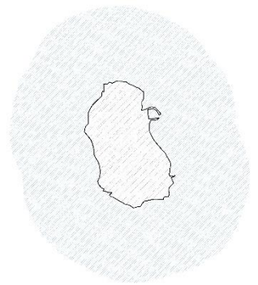
ALIGNMENT TO SPATIAL POLICY

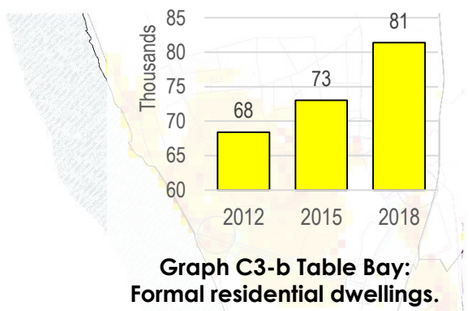
All of these developments are in-transit and employment-accessible, mixed-use areas, either within or in proximity to nodes and corridors and aligned to spatial planning policy.

Paarden Eiland no longer aligned as development risks are pricing out existing job generating uses. River Club is arguably a site specific alteration from policy, but due to site specific conditions such as flooding being addressed the development has gone ahead.

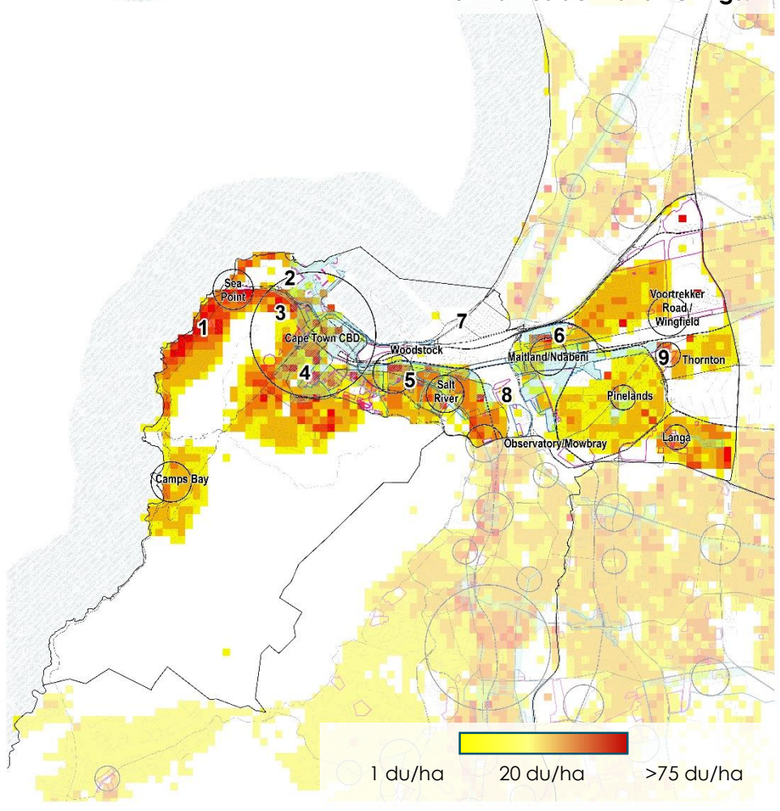
LOCAL LEVEL TRENDS

1. Sea Point: Increased residential density along Main and Regent roads in Sea Point and some redevelopments in Mouille Point.
Station House – multi-storey apartments, ground floor retail. Trend of redevelopment along Main Rd with a mix of apartment hotels, apartments and ground floor retail. Luxury market multi-storey.
2. Waterfront: Silo precinct – hotels, offices and residential. Gateway/Canal Precinct – hotels offices and residential. Luxury market multi-storey.
3. De Waterkant, Green Point: Increased residential density along Somerset Road in Green Point and around De Waterkant. Some apartment hotel type developments, e.g. 169 Main Rd, Green Point, Old Cape Quarter – luxury market, apartments multi-storey.
4. CBD: Increase in residential density in CBD.
16 on Bree – multi-storey apartment block; 1 Thibault Square – redevelopment of office to residential multi-storey; Student housing – Cape Town station – multi-storey student housing; District Six Phase 3 – land restitution apartments and terrace single res units.
5. Woodstock/Salt River: Increase in residential density along Victoria Rd and Albert Rd.
WEX – multi-storey apartments; development along Albert Road; Woodstock Quarter – mixed use multi-storey development on transit corridor; Pickwick Street – Social Housing, multi-storey close to transit corridor.
6. Maitland: Maitland Mews – social housing on VRC; Prime – apartment building, conversion from industrial – one developer converting entire Maitland Station precinct from industrial to residential.
7. Paarden Eiland: Conversion of industrial to mixed use along Marine Drive in Paarden Eiland. Rezonings in this area. See District Plan annexure for details.
8. Two Rivers Urban Park: River Club, mixed use infill in the Two Rivers Urban Park area.
9. Conradie: Public private partnership for better living precinct in Conradie Park. Greenfields site to residential dominant precinct.





Graph C3-b Table Bay: Formal residential dwellings.



Map C3-b: Gross residential density (2018).

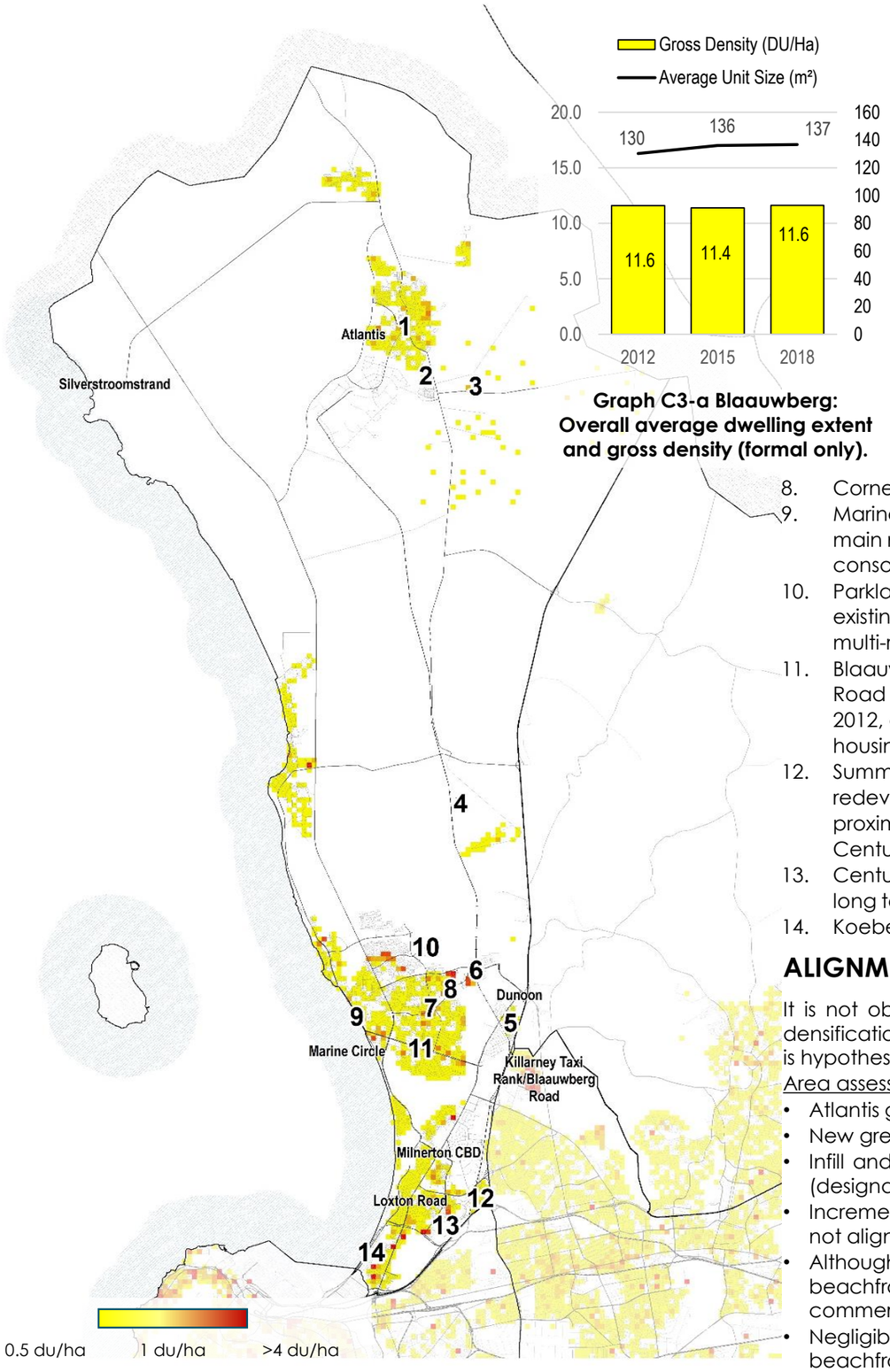
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018

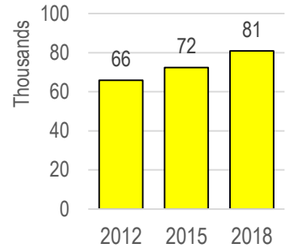


Map C3-a Blaauwberg: Change in gross residential density (2012 to 2018).

Graph C3-a Blaauwberg: Overall average dwelling extent and gross density (formal only).

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)



Graph C3-b Blaauwberg: Formal residential dwellings.

LOCAL LEVEL TRENDS

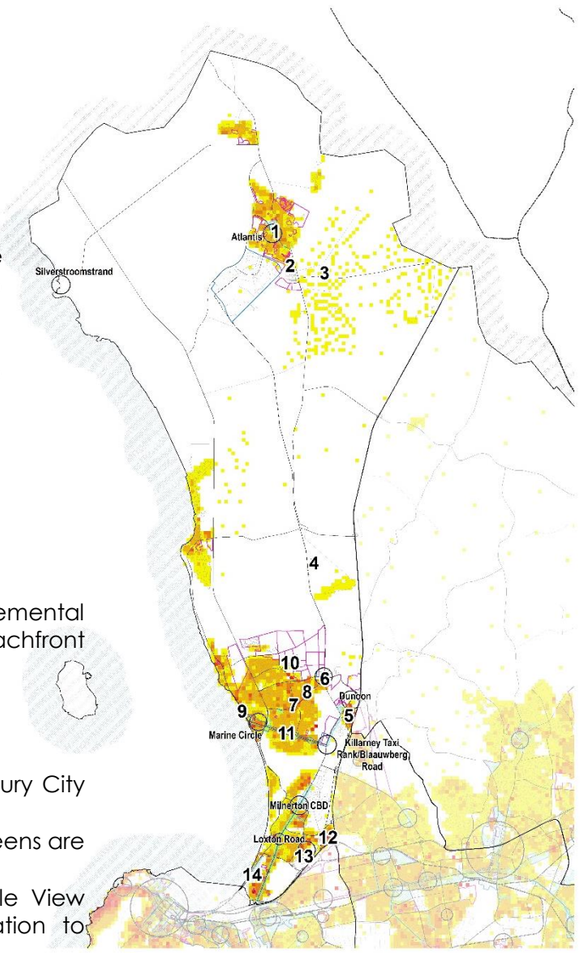
1. Atlantis – low to medium increases associated with government housing projects.
2. Witsand north – high increase in density due to housing project.
3. Low density but widespread throughout the Klein Dassenberg smallholding area.
4. Wolwerivier TRA established.
5. Dunoon – redevelopment of RDP units to micro developments. Incremental growth.
6. Rivergate node – Pioneer Valley affordable group housing development, predominantly FLISP. Blocks of flats west of railway.
7. Parklands Main Road – infill of fairly recent township establishment.
8. Corner Gie and Parklands - Stepney Green apartment complex, affordable rental.
9. Marine Circle and Beachfront – some increases in density in few roads back from the main node and then up along the coast. Redevelopment on Birkenhead Rd includes consolidations and redevelopment and guesthouses.
10. Parklands, Sunningdale and Sandown expanding on edge of City. Package of plans – existing EIA ROD and designated urban expansion area. Combination of single res and multi-residential.
11. Blaauwberg Road corridor, increase in density around Marine Circle and Porterfield Road (area west of R27), **not** a definitive change in density for area east of the R27 since 2012, although base density is higher than surrounding suburb due to long existing group housing schemes along corridor.
12. Summer Greens – Whole suburb showing an increase in gross density. Many SR1s being redeveloped/ added to for small blocks of flats and second and third dwellings. In close proximity to century City node, but affordability lower than the adjacent new build at Century City.
13. Century City – Areas of big increased densities are a result of the developer taking up long term development rights in the roll out of the Package of Plans approval.
14. Koeberg Road – densification along the corridor.

ALIGNMENT TO SPATIAL POLICY

It is not obvious if the increases in density is in line with spatial policy in this district. Incremental densification responding to market dynamics and intrinsic locational characteristics e.g. beachfront is hypothesised to play a larger role.

<u>Area assessment of alignment to spatial policy:</u>

- Atlantis generally aligns with NDAs.
- New greenfield development generally took up NDAs (Sunningdale, Parklands, etc.).
- Infill and redevelopment occurred in Koeberg Road (designated corridor), and at Century City (designated node).
- Incremental and micro-unit development in DuNoon, and Joe Slovo Park and Summer Greens are not aligned with spatial planning policy guidelines.
- Although there are no specific policy guidelines in place for densification along Table View beachfront, densities continue to increase in this area due to its accessible location to commercial and recreational facilities.
- Negligible change in density along Blaauwberg Road corridor, except for Marine Circle node. The beachfront proximity and corresponding market dynamics appear to be stronger influence to density than spatial policy.



Map C3-b Blaauwberg: Gross residential density (2018).

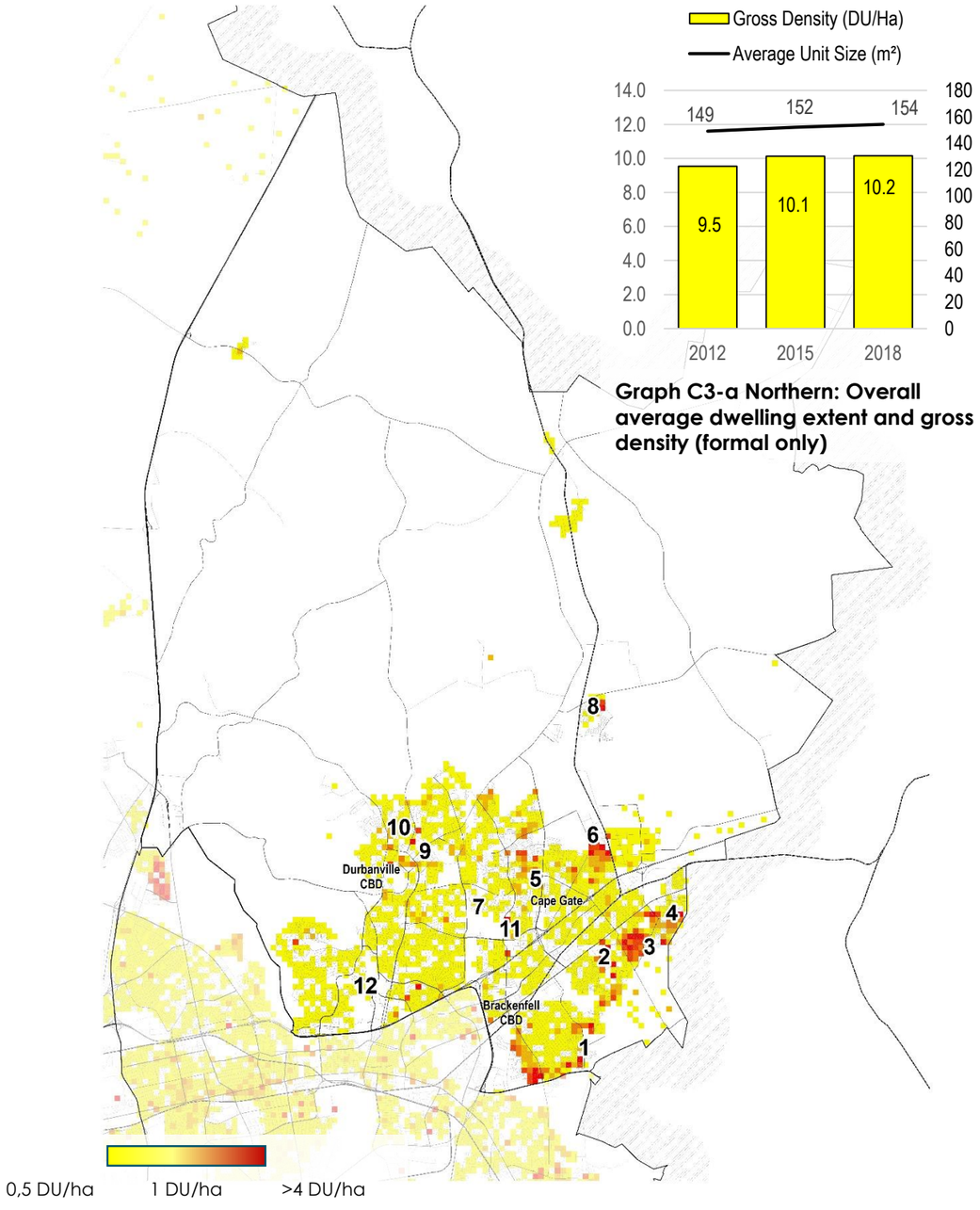
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4ha (200m x 200m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C3-a Northern: **Change in gross residential density (2012 to 2018)**

Graph C3-a Northern: Overall average dwelling extent and gross density (formal only)

ALIGNMENT TO SPATIAL POLICY

In the majority of instances, the changes in density (increase) can be ascribed to proposals (designations) in the Northern District Plan (2012), i.e. mainly in the Durbanville CBD and NDA's, but not along corridors. However, the Densification Policy also played a role, in terms of incremental densification in older, established and lower density residential areas.

DISTRICT LEVEL ANALYSIS

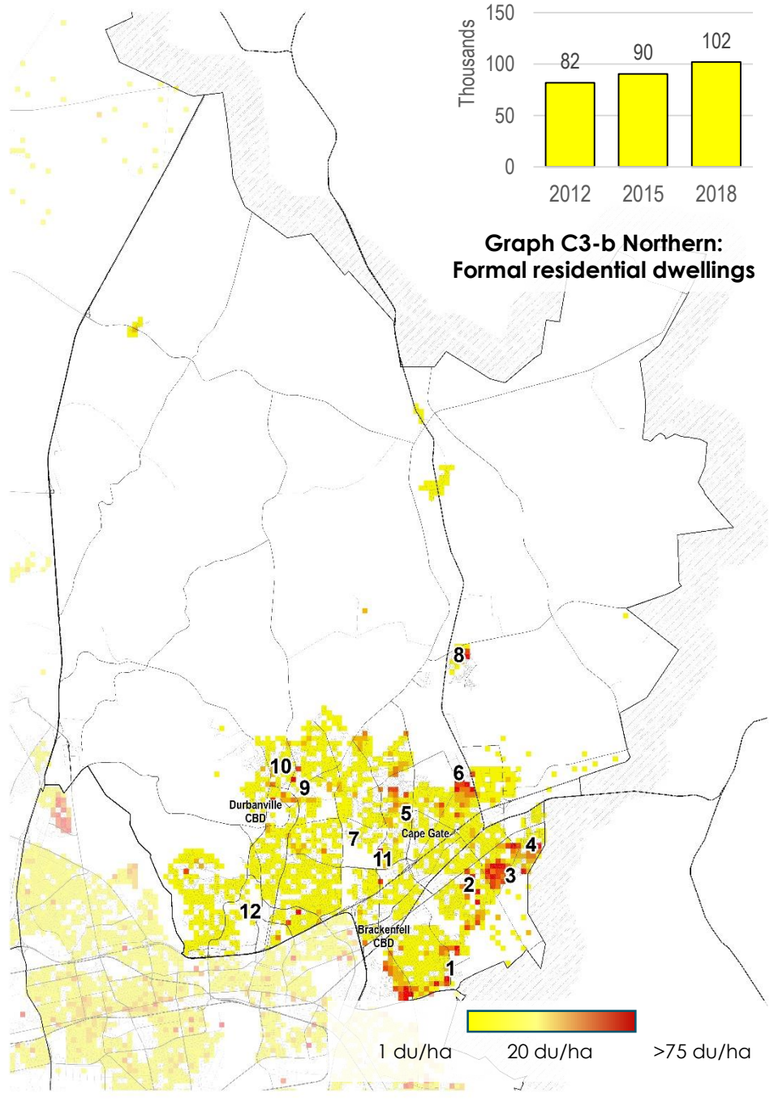
NORTHERN DISTRICT (C)

LOCAL LEVEL TRENDS

Primarily the trends (densification) in Northern District relate directly to proposals in the 2012 Northern District (mostly NDA's). However, the Densification Policy also had an impact relating to incremental densification, especially in lower-density older single residential areas where small-scale subdivisions and GR1 development occurred. As building plan approvals were used, densification in areas such as Wallacedene may be ascribed not to 'densification' as such, but rather 'People's Housing Process', where original development only provided for 'site and service' in terms of the former Less Formal Township Development Act.

1. Kruis Road smallholdings: Brackenfell; NDA in 2012 DP, and remaining undeveloped ones in 2023 DSDF. Mostly GR1 developments (infill).
2. Scottsdene: Subsidised and social housing development. Was NDA in 2012 DP.
3. Informal settlement as reason for change in density.
4. Bloekombos and Wallacedene: Primarily a People's Housing Programme, where informal structures were replaced with formal top structures. Maroela North and South (proposed development areas) shown as NDA's in both 2012 and 2023 District Plans. Now occupied by informal structures (illegal).
5. Redevelopment (infill) of Langeberg smallholdings. NDA's in both 2012 and 2023 District Plans (undeveloped ones shown in 2023 DP).
6. Buh-Rein estate. NDA in 2012 DP. Planned at average gross density of 45 du/ha, but implementation has culminated in lower densities in view of market demand (more GR1, less flats, GR3).
7. Tara suburb (Durbanville): Densification proposal in 2012 DP, that has been implemented, primarily subdivisions and GR1 developments (small scale).
8. Greenville, Fisantekraal: Subsidised residential in line with NDA in 2012 and 2023 District Plans.
9. Durbanville secondary CBD: Increase in densities (primarily GR1) in line with sub-district development guidelines(both 2012 and 2023 District Plans).
10. Areas east of Vissershok Road, Durbanville: Primarily GR1 infill development on large underutilised properties as prescribed/proposed in 2012 District Plan.
11. Higher densities (GR1-3) east of Brackenfell Boulevard: Was not NDA in 2012 District Plan, as development proposal was already in process.
12. Polygon questioned as no residential development occurred in timeframe 2012- 2018. May have been partial redevelopment of commercial site at Willowbridge.

Graph C3-b Northern: Formal residential dwellings



Map C3-b Northern: **Gross residential density (2018)**

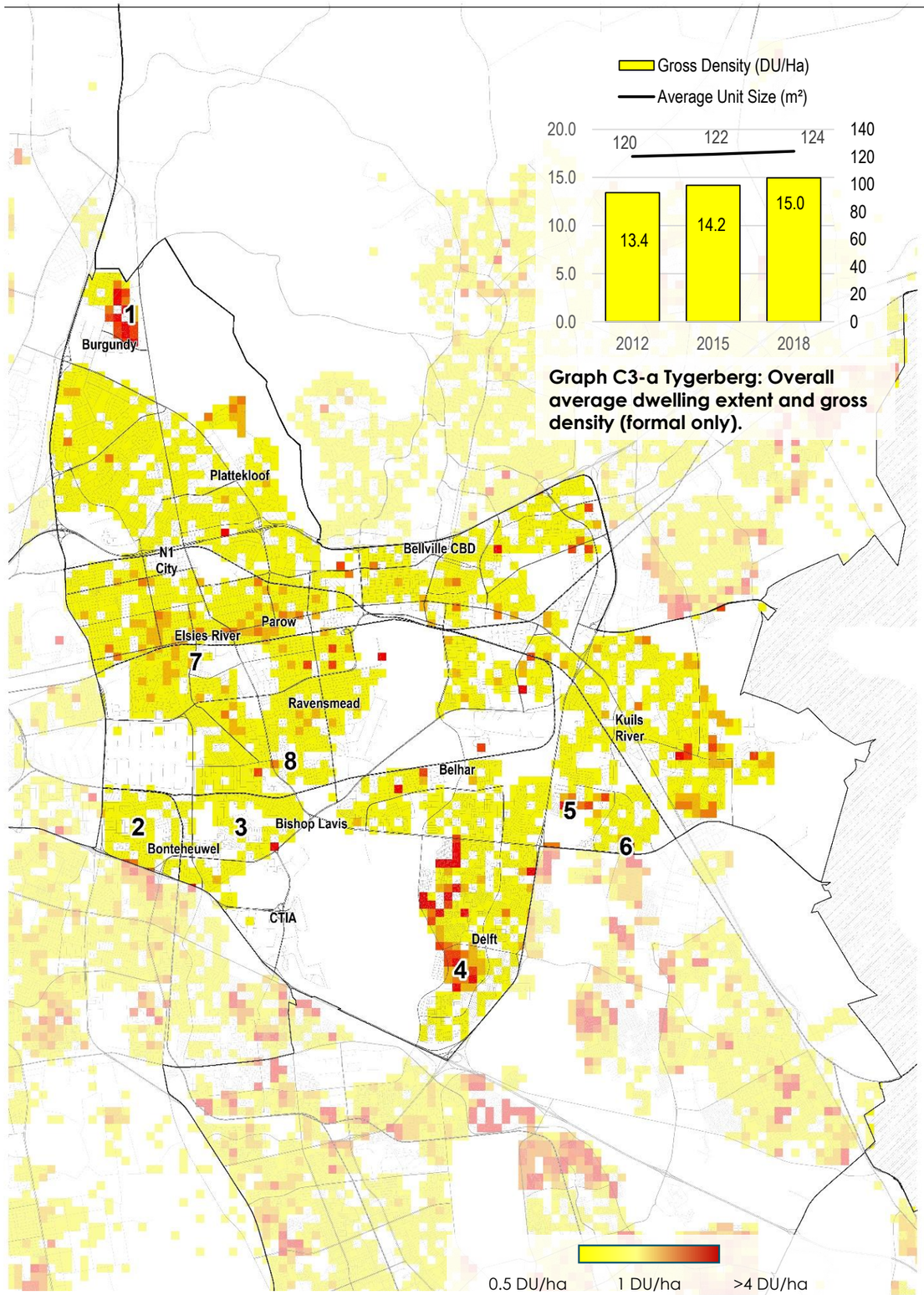
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4ha (200m x 200m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C3-a Tygerberg: Change in gross residential density (2012 to 2018).

Graph C3-a Tygerberg: Overall average dwelling extent and gross density (formal only).

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)

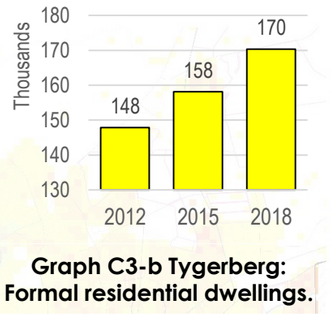
ALIGNMENT TO SPATIAL POLICY

Significant increases in density between 2012 and 2018 occurred in the historically lower-income level areas (i.e. southern part of the district) characterised by higher residential densities. This trend is not aligned to any targeted areas for densification as per the spatial policy and can be interpreted as being incremental in nature.

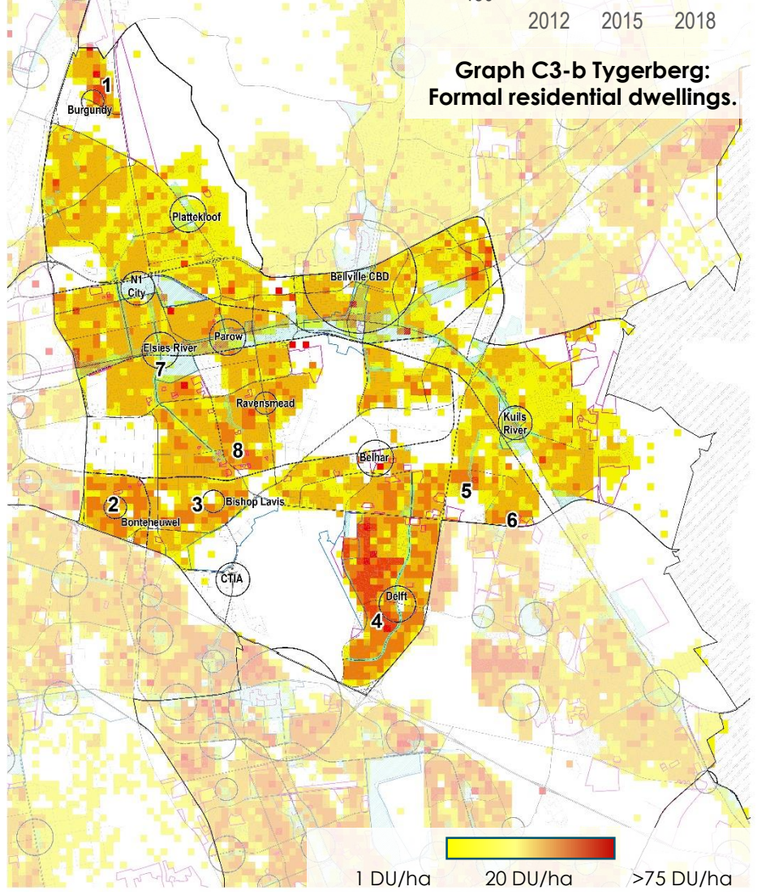
LOCAL LEVEL TRENDS

The section below highlights the areas where a substantial change in gross residential densities was observed. It can be noted that in general these are found in areas where subsidised human settlement projects are being implemented as well as smaller-scale urban infill development. It can also be argued that in the established residential areas, the increase can be due to incremental densification in the form of second and third dwellings.

1. Substantial increase in gross densities due to various portions of Burgundy Estate with the majority being group housing and apartments being constructed.
2. and 3. and 8. Residential suburbs of Bonteheuwel, Bishop Lavis, Elsies River and Ravensmead show a moderate increase in residential gross density – argued that it is mostly incremental densification.
4. Delft and Belhar show a moderate to high increase in residential density – various subsidised human settlement projects, social housing and apartments being implemented (Symphony Way, Delft Phase 7 – 9, Unibell Station area).
5. Phase 3 of Kalkfontein human settlement project.
6. Stellendale general residential projects being implemented. NDA targeted for medium to high residential densities in District Plan.



Graph C3-b Tygerberg: Formal residential dwellings.



Map C3-b Tygerberg: Gross residential density (2018).

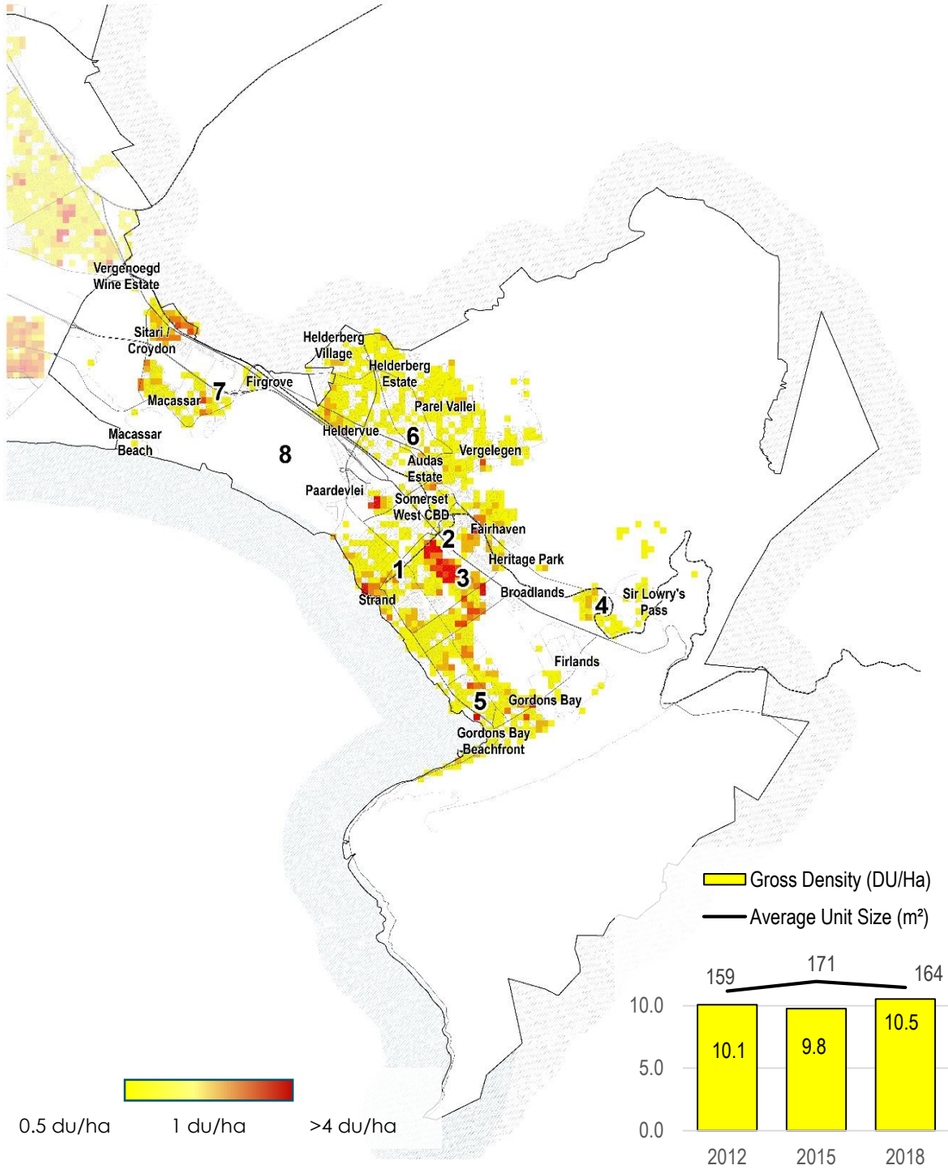
C.3

LAND AND BUILDING DEVELOPMENT

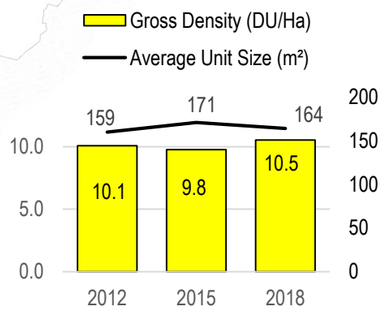
FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C3-a Helderberg: Change in gross residential density (2012 to 2018).



Graph C3-a Helderberg: Overall average dwelling extent and gross density (formal only).

ALIGNMENT TO SPATIAL POLICY

Significant increases in density between 2012 and 2018 occurred in various regions within the district. These density increases can be found along the main transport routes and high-activity roads as well as along the boundary of informal settlements. These increases range from low density along the main roads to higher residential densities along internal roads and settlement boundaries. This trend is aligned to targeted areas for densification as per the spatial policy and can be interpreted as being incremental in nature.

DISTRICT LEVEL ANALYSIS

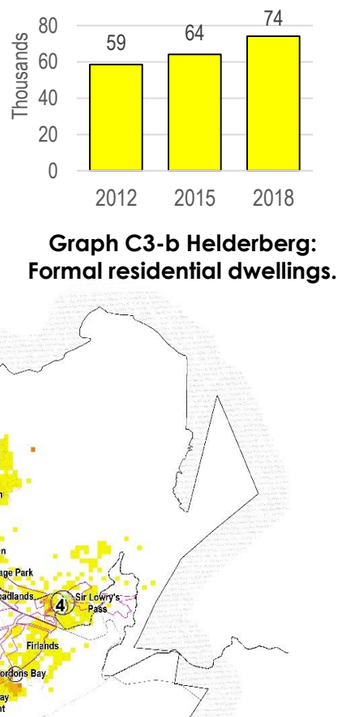
HELDERBERG DISTRICT (E)

LOCAL LEVEL TRENDS

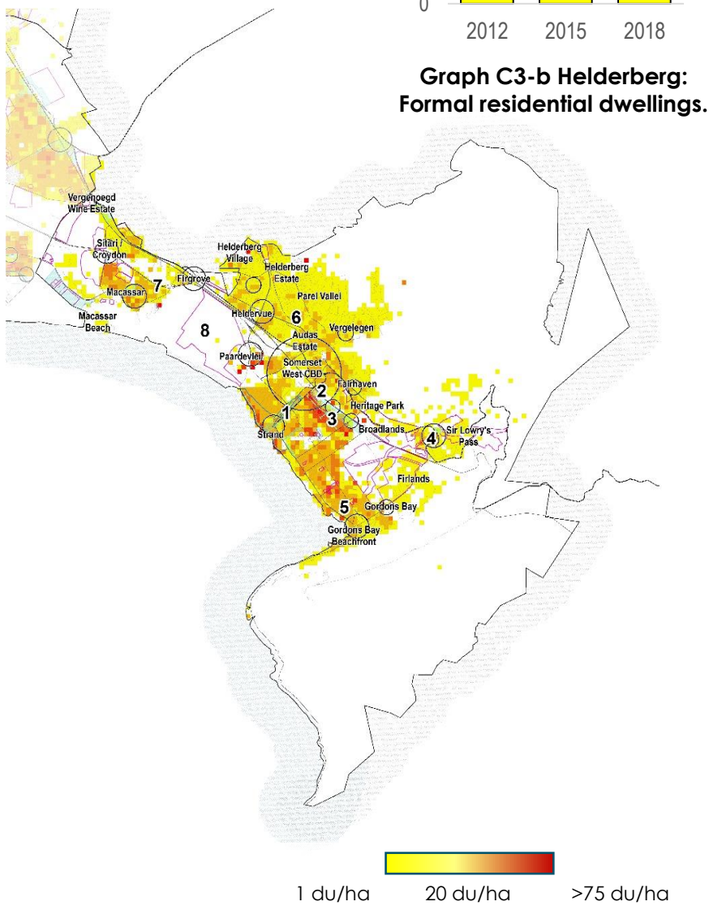
The section below highlights the areas where a substantial change in gross residential densities was observed. It can be noted that in general these are found in areas where subsidised human settlement projects are being implemented as well as smaller-scale urban infill development.

The following areas depicted on the maps (change in gross density) are worth noting:

1. Strand Main Road shows can increase in density from low to medium with pockets of high-density residential due to completed single residential dwelling units between 2016 and 2019.
2. Within the district node, an increase from low-density to medium-density residential development due to completed single residential and multi residential developments such as Hageland Estate and Sea View Lake Estate, etc.
3. Along Solomon Street towards the boundary between Lwandle and Strand shows an increase to high-density residential development with confirmed residential units as well as substantial informal residential units.
4. Sir Lowry's Pass around the main town centre and railway lines shows an increase in density and residential development (local node) due to an increase in single residential submissions in 2016, 2017 and 2018 and the completion of single residential in 2018, 2019 and 2020/21 such as Somerset Forest Walk Estate and the residential development adjacent to it. Furthermore, there was a submission of a major single-residential development Old Sir Lowry's Pass Road. Over the years, there has been an increase in the informal settlement known as Uitkyk.
5. Gordon's Bay around the main town centre and within the local node shows an increase in density between low and medium density, as well as along Dennehof Road due to completion of single residential in 2016/17 with further completion of single residential in 2018/19 and 2020/21. In 2020/21, there was an increase in multi residential submissions such as Seascaoe Mews complex and single residential submissions. Furthermore, this is due to the completion of single residential and pockets of single-residential submissions along the eastern urban edge in 2016/17.
6. Somerset West local node along the R44 and Somerset West shows an increase in density due to an increase in completed single residential and multi residential in 2019 and multi residential submissions and single residential in 2020/21.
7. Major increase in density in Firgrove and Faure due to completed single residential and multi residential in 2020/21 such as Schonenberg Estate, the Huntsman Development and Sitari Estate, etc.
8. Increase in density in Paardevlei due to the submission of multi residential in 2016 and the completion thereof in 2018, with further completion of multi residential in 2020/21.



Graph C3-b Helderberg: Formal residential dwellings.



Map C3-b Helderberg: Gross residential density (2018).

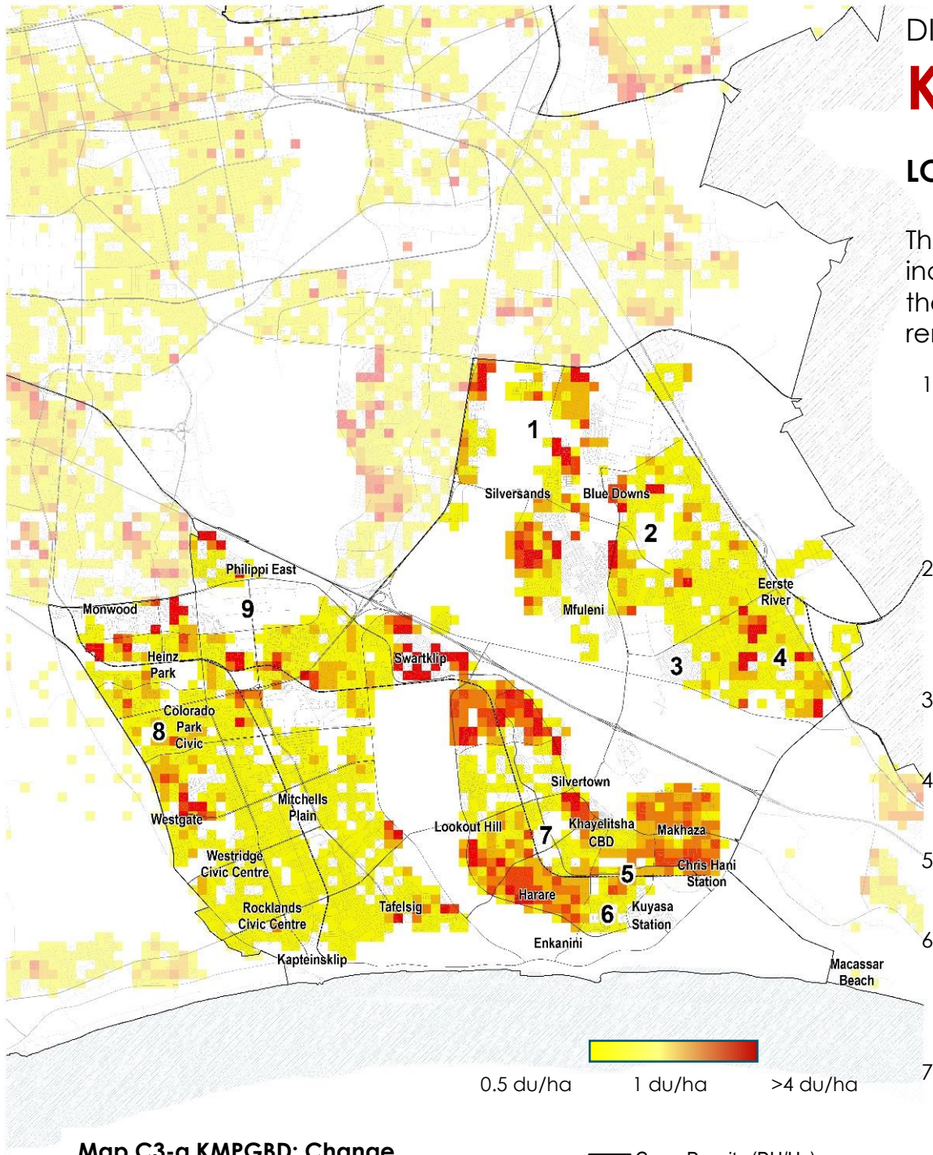
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

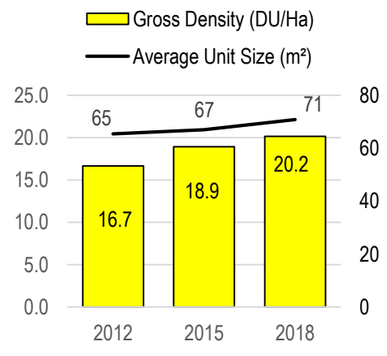
Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C3-a KMPGBD: Change in gross residential density (2012 to 2018).

ALIGNMENT TO SPATIAL POLICY

Most of the spatial targeted areas in the 2012 KMPBD District plan, including residential NDAs, nodes, mixed-use intensification and development routes areas, have been developed informally.



Graph C3-a KMPGBD: Overall average dwelling extent and gross density (formal only)

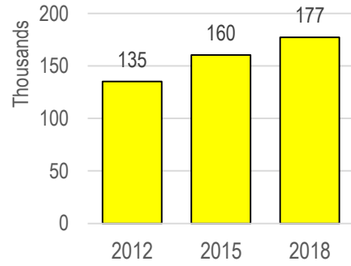
DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)

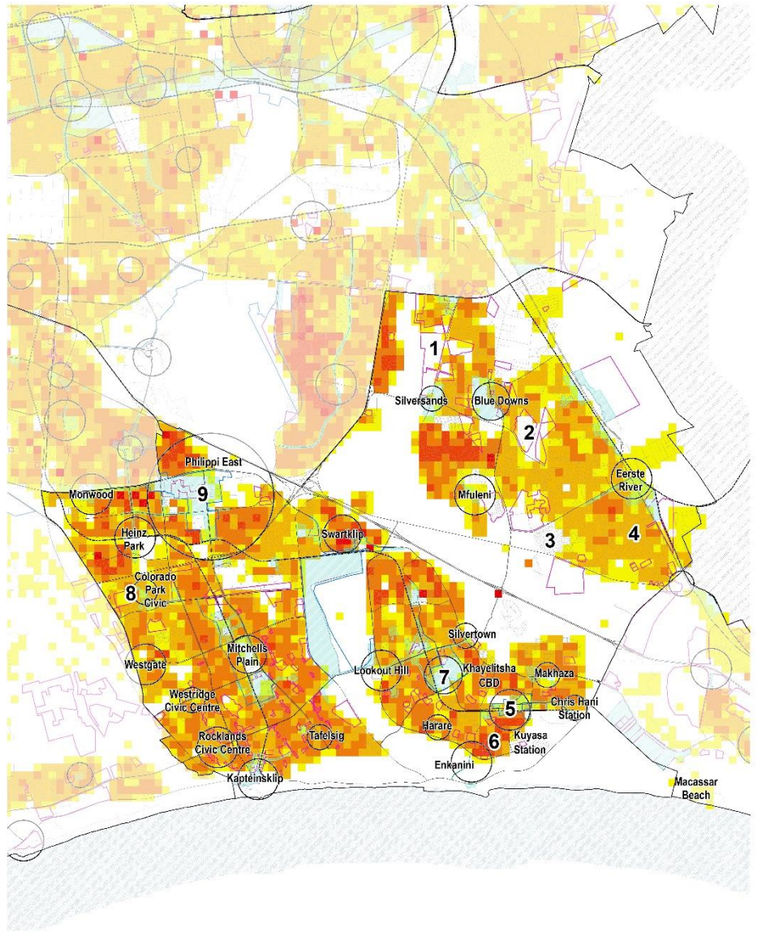
LOCAL LEVEL TRENDS

The following areas in the KMPGBD District have seen a massive increase in residential development in the last 10 years, largely in the form of state-assisted housing programmes and small-scale rental units, which has resulted in a significant change in density:

1. Hagley area including Westbank – the area has seen an increase in the number of residential developments, both in terms of private and public housing. The house form/typology is mostly single dwelling houses, with a few blocks of flats not exceeding two-storey buildings. The greater part of Wesbank has seen a significant increase in residential development in the form of small-scale rental units (which have not been formalised through the land use and building application process).
2. Greater Blue Downs and Mfuleni – there has been an increase in residential development by the private sector, in the form of flats ranging from two to three storey buildings. Greater parts of Mfuleni have seen an increase in small-scale rental units (which have not been formalised through the land use and building application process).
3. Forest Village – the area has seen a massive increase in residential density, largely in the form of state-assisted/-subsidised housing projects. The typology is largely two storey dwelling units with shared party walls.
4. Greater Eerste River – a number of vacant properties has also attracted the private sector to increase housing provision, accommodating a variety of typologies from freestanding houses to blocks of flats.
5. Kuyasa Station – this area has seen an increase in residential development in the form of small-scale rental units (which have not been formalised through the land use and building application process).
6. Nkanini and Monwabisi – the area has been transformed from informal settlements to formalised serviced sites. This has resulted in the submission of building plans to include main second and third dwellings. In terms of the DMS zoning (SR2), these are approved as shelters; however, they are being used as small-scale rental units.
7. Greater Khayelitsha including the CBD area – a development framework approved for the area earmarked the area for high-density residential development, focusing on block of flats as the dominant typology. Although the area has not seen much take-up of formal residential development as per the development framework, there has been a massive increase in informal residential dwellings, taking place on serviced sites, in the form of second and third dwellings on a single site.
8. Weltevreden smallholding area and parts of Mitchells Plain – a significant number of single dwelling/freestanding houses developed by the private sector has been approved in recent years. Furthermore, a number of social housing projects can be ascribed to the increase in densities due to the abundance of vacant land appropriate for new residential development in terms of the 2023 DSDF. It is anticipated there will be additional applications for residential development are anticipated, which will further densify this area.
9. Philippi East – in the 2012 District Plan, the area was designated for medium to high-density residential infill development with blocks of flats ranging from 2 to 4 storeys. However this has not materialised due to the increase in informal residential development.



Graph C3-b KMPGBD: Formal residential dwellings



Map C3-b KMPGBD: Gross residential density (2018)

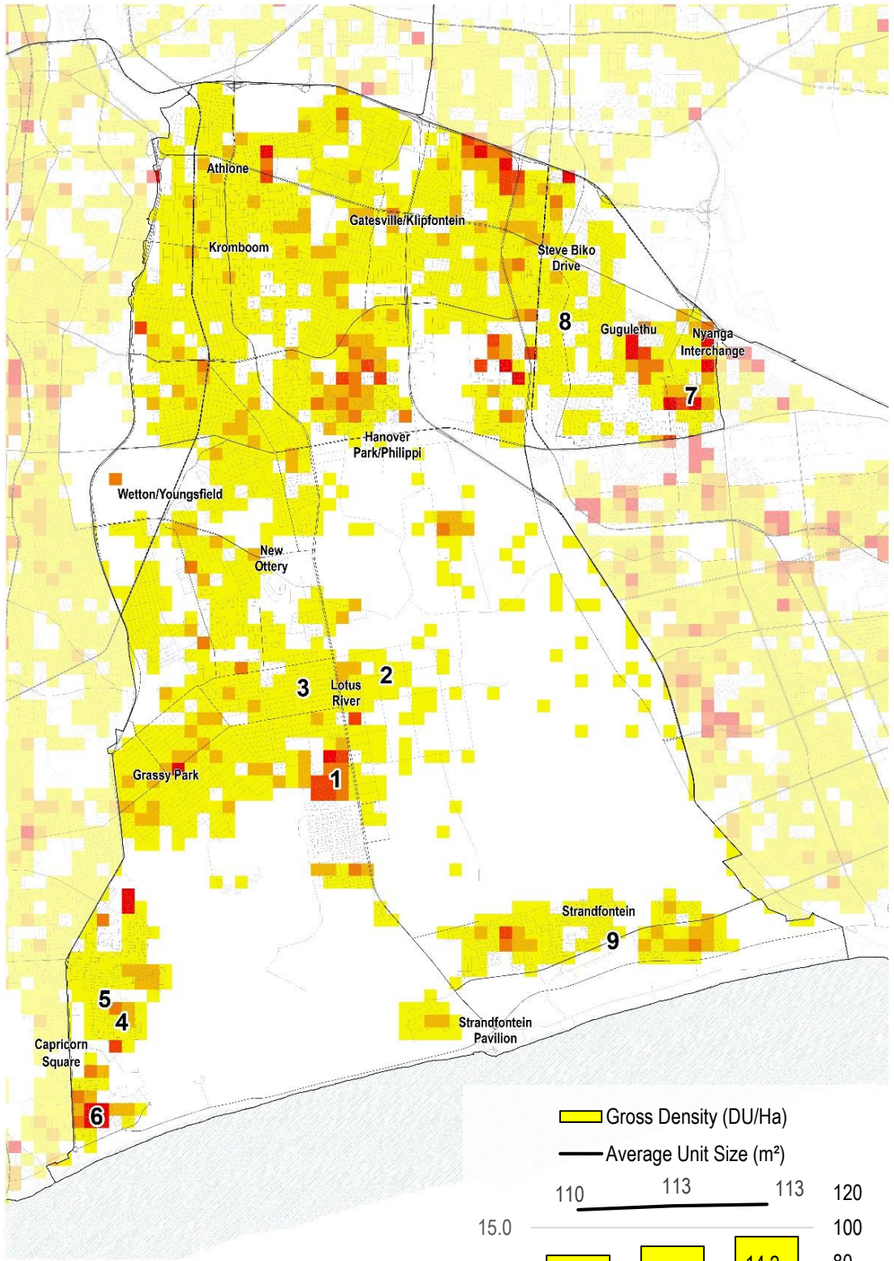
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



0.5 du/ha 1 du/ha >4 du/ha

Map C3-a Cape Flats: Change in gross residential density (2012 to 2018)

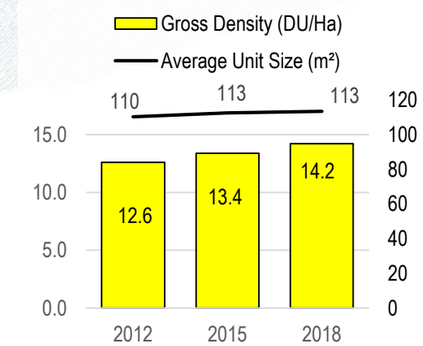
DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)

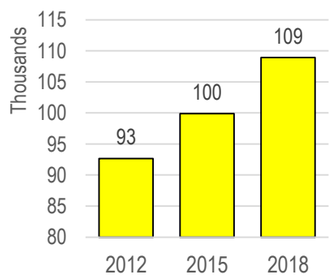
LOCAL LEVEL TRENDS

The Cape Flats District is characterised by consistent low-scale/incremental densification through predominantly single-residential development across the district over this period. Areas of greatest increases in residential density in the district are associated with government-subsidised housing projects and include Pelikan Park, Hanover Park and the Welcome Estate/ Heideveld area. The section below highlights the areas where a substantial change in gross residential densities was observed:

[1] Pelikan Park Phase 1 (previously a NDA and along development route) has seen significant formal residential development (mostly FLISP). Phase 2 (potential high-density NDA) is at an advanced planning stage.
[2] Schaapkraal area has also seen significant change in density through incremental densification (small-scale subdivisions) and the development of flats closer to the [3] Lotus River node (more subdivision and rezoning applications for densification have been received in the past three years – the broader area is rapidly transitioning from smallholdings and are supported in the guidelines). [4] Vrygrond and [5] Seawinds have also seen significant informal growth (backyarding) not aligned to any particular spatial policy guidelines.
[6] The Capricorn and Costa da Gama areas have seen significant formal growth with a mix of single-storey units and two- to five storey flat complexes – not aligned to any SPCs although in close proximity to the Muizenberg district node, and Prince George Drive is a major public transport route. There are higher densities within the [7] Nyanga and [8] Gugulethu nodes aligned with the Steve Biko, Klipfontein and Emms Drive development corridors for access to public transportation and retail/business facilities. These areas are also associated with high levels of informality.

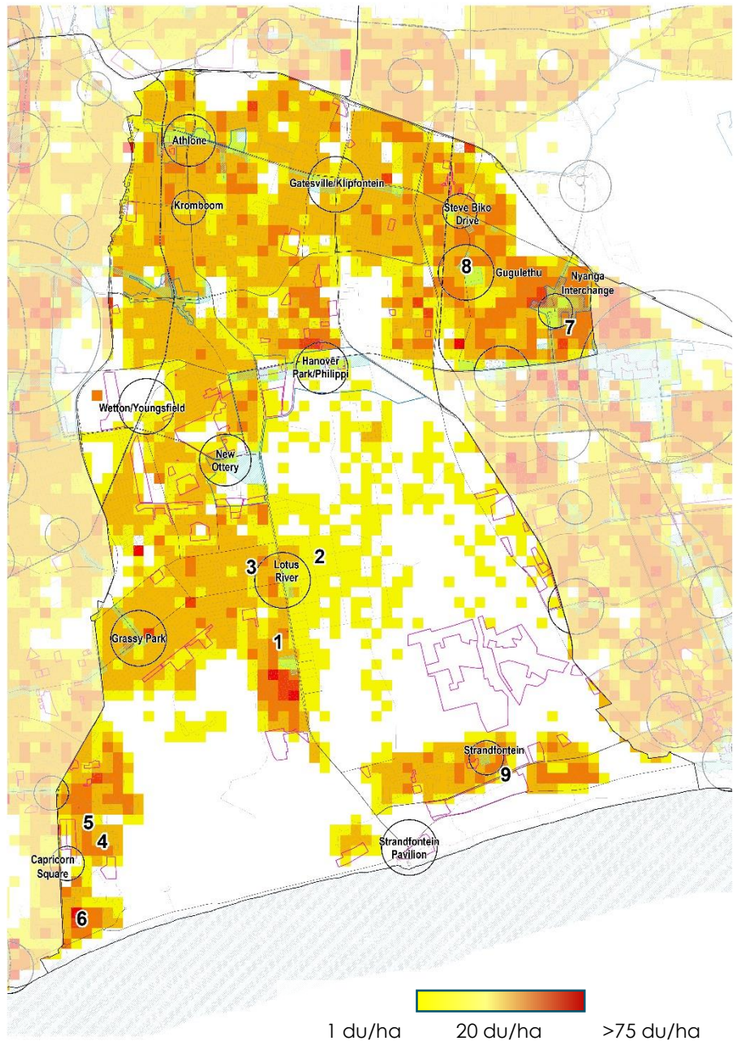


Graph C3-a Cape Flats: Overall average dwelling extent and gross density (formal only)



Graph C3-b Cape Flats: Formal residential dwellings.

The high residential density to the north of Spine Road in Strandfontein [9] is aligned with the new Neighbourhood Node, but the high density south of Spine road is not aligned with any spatial policy guideline. However, Spine Road is a public transport route (future MyCiti BRT) and there are significant NDAs adjacent to the growth area.



1 du/ha 20 du/ha >75 du/ha

Map C3-b Cape Flats: Gross residential density (2018)

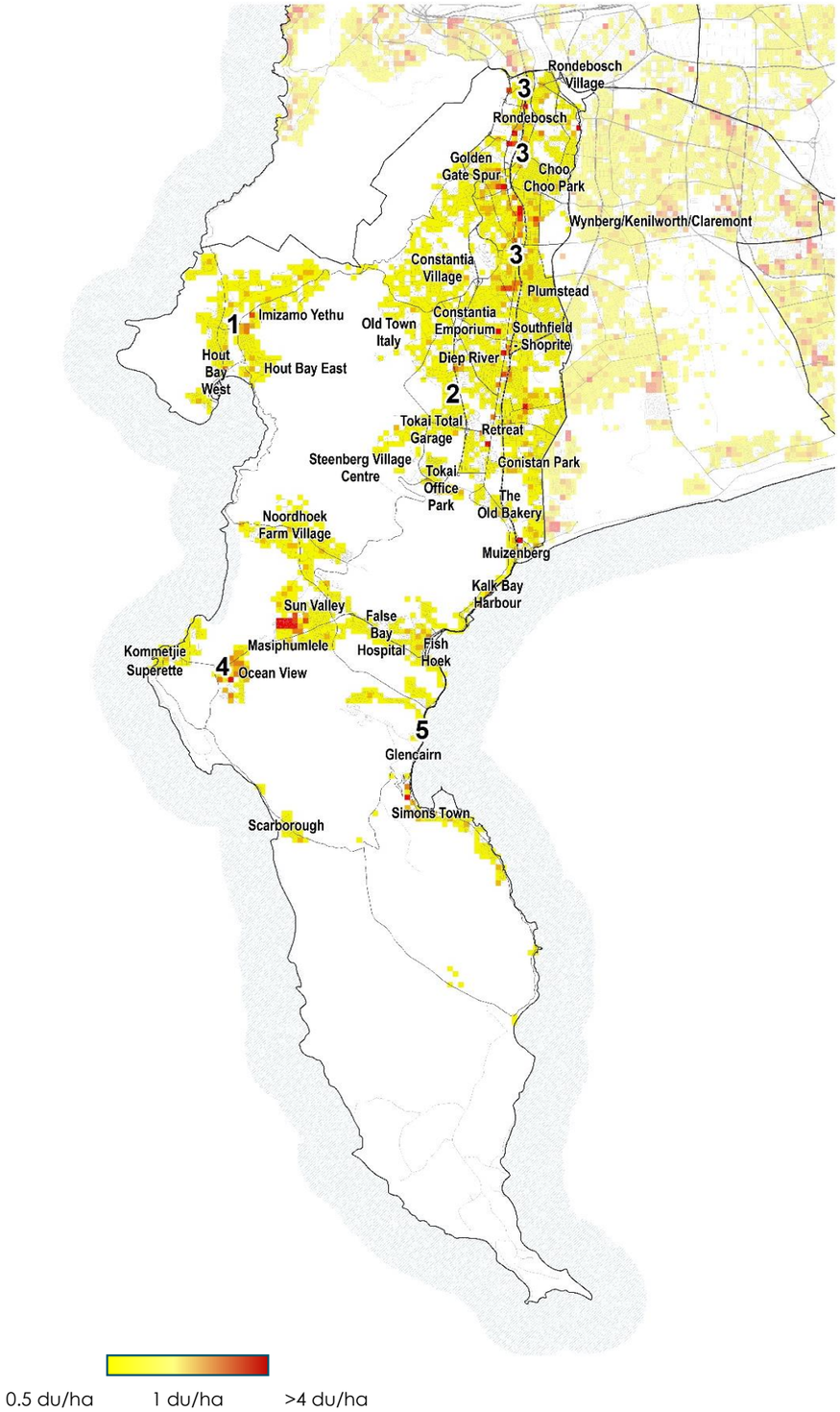
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C3-a Southern: Change in gross residential density (2012 to 2018).

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

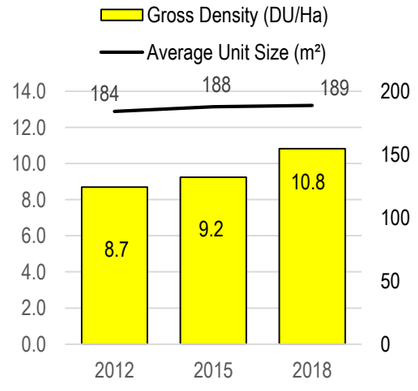
LOCAL LEVEL TRENDS

Change in formal residential density in the Southern District has comprised of two distinct types. The first, and far more widespread, is small-scale incremental subdivisions happening in mainly peripheral low-density residential areas (in [1] Hout Bay, [2] Constantia – Tokai, and to a lesser extent the Far South).

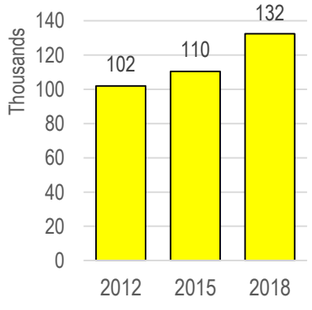
The second is urban (primarily residential) infill occurring on smaller undeveloped or underdeveloped pockets (not identified as NDAs - <1ha) throughout the district. Higher density development has focussed around the 'UCT sphere of influence' area ([3] Mowbray to Wynberg), comprising small apartments to accommodate one or two person households (students, young workers and single parent families). These are generally larger erfs with 6-10 storey flats built by bigger developers (e.g. Rawson) within or close to urban nodes, or smaller erf (400-1 000m²) 3-5 storey flats close to urban nodes or the Main Road corridor.

ALIGNMENT TO SPATIAL POLICY

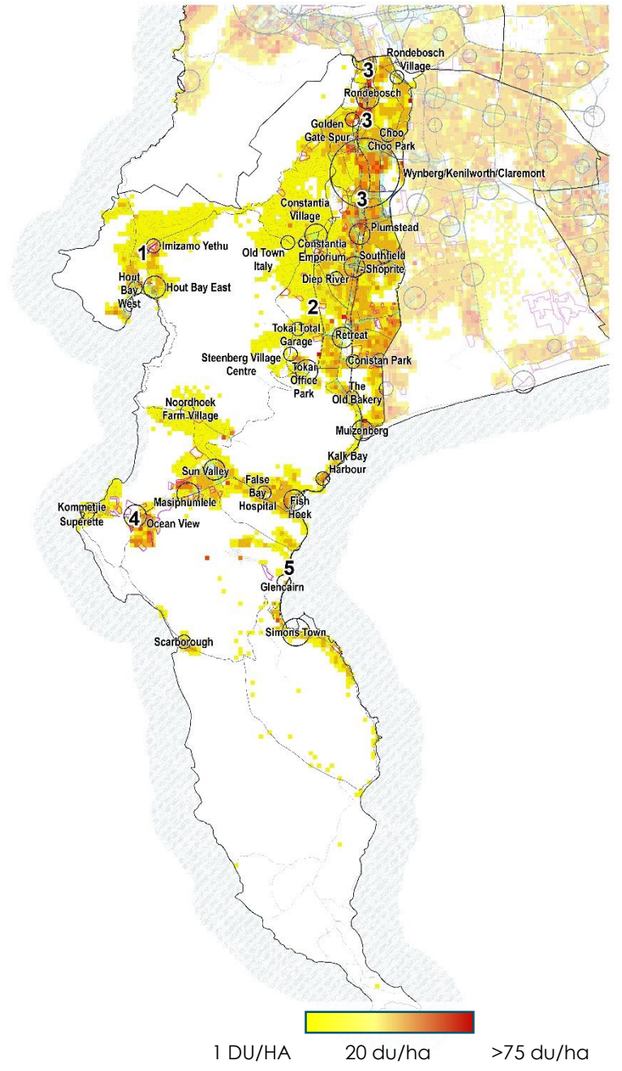
Little to no infill has taken place in identified NDA areas except for residential NDAs in the Kommetjie area [4]. Construction has started (but is not completed) at [5] Dido Valley. Many of the lower-density developments in more peripheral areas are increasingly in demand as retirement complexes.



Graph C3-a Southern: Overall average dwelling extent and gross density (formal only)



Graph C3-b Southern: Formal residential dwellings



Map C3-b:Southern Gross residential density (2018)

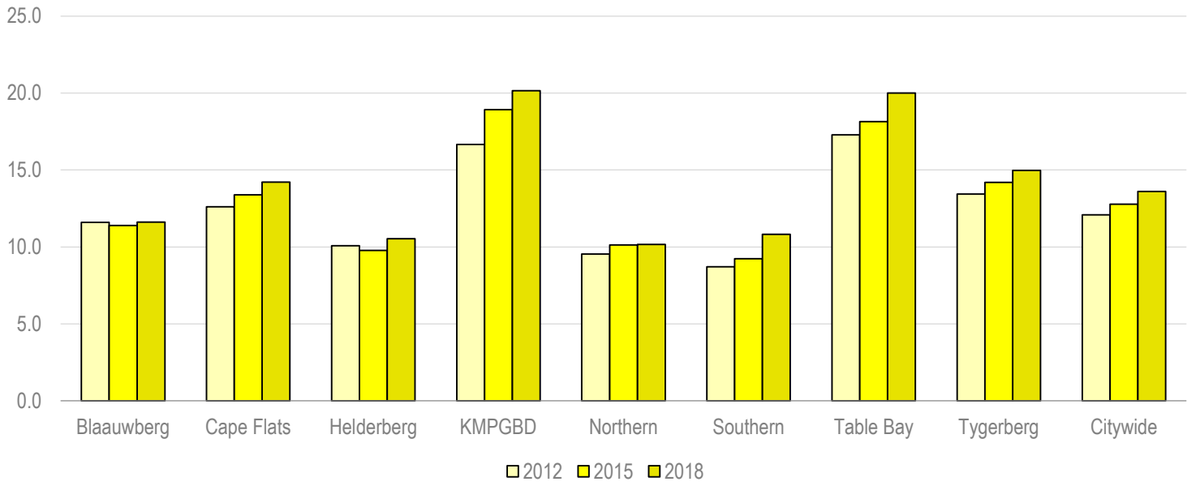
C.3

LAND AND BUILDING DEVELOPMENT

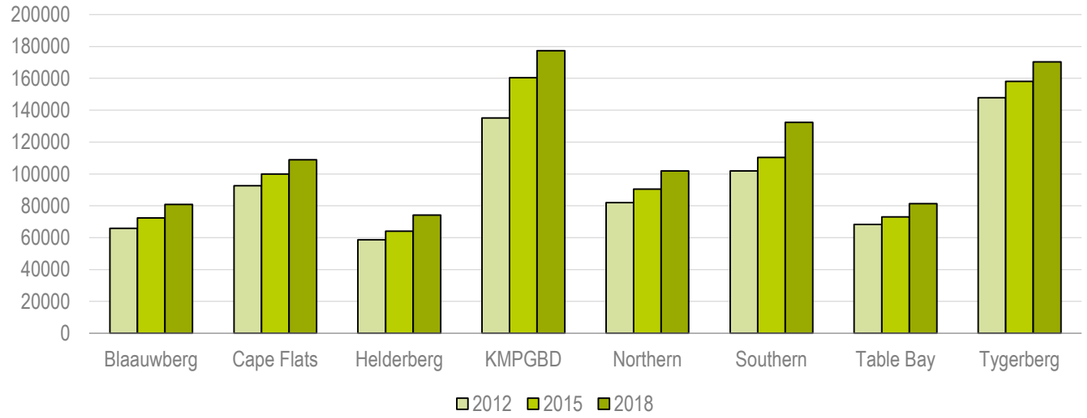
FORMAL RESIDENTIAL DENSITY (DISTRICT ANALYSIS)

This indicator shows a change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only). Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

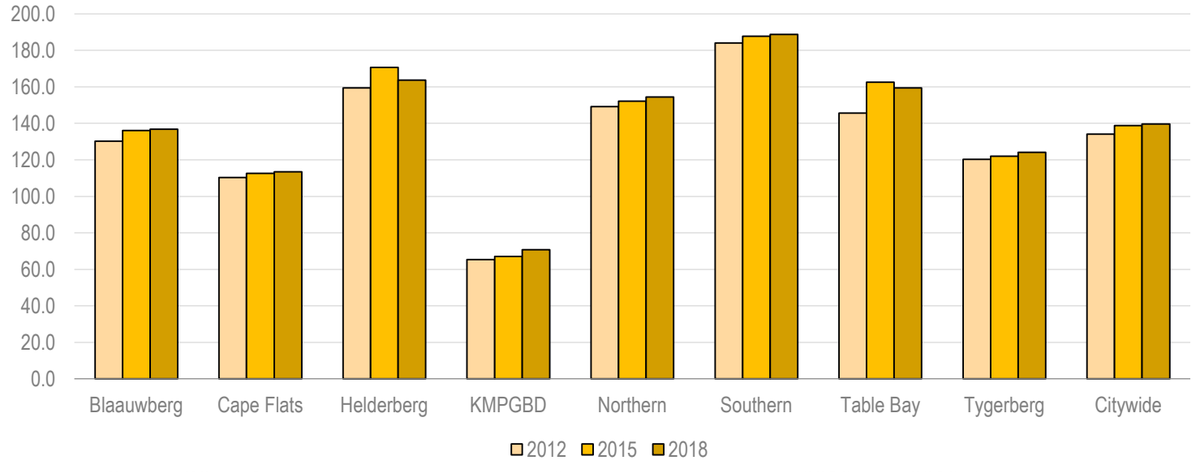
Source: CCT Valuation Rolls 2012, 2015 and 2018



Graph C3-c: Average gross density (formal only) per district between 2012 and 2018



Graph C3-d: Number of formal residential dwellings per district between 2012 and 2018



Graph C3-e: Average dwelling extent (m²) per district between 2012 and 2018 (formal only)

GENERAL ANALYSIS

The graphs on this panel provide a breakdown and comparison of the formal residential density data between each of the eight planning districts. They provide a further insights to the trends shown in map C3-a and map C3-b on the previous panel. Each planning district and it's particular focal points / trends is discussed individually in subsequent panels.

Graph C3-c on the left compares the change in gross formal residential density (DU/ha) in the planning districts in the City between 2012 and 2018. Main insights include:

- Citywide, gross density has in general increased over the period. The gross residential density in Cape Town has increased by ± 13% to 13,6 du/ha.
- Gross densities in the Southern and KMPGBD districts have both increased by more than 20% and gross densities in the Table Bay District have increased by ± 16%. These areas in the city typically have less greenfield land available and intensification is required.
- The gross residential density has remained relatively constant in the Blaauwberg District and only increased slightly (± 5%) in the Northern and Helderberg districts. These are areas where new development often occurs on the periphery.
- Currently, the highest gross densities are in Table Bay and KMPGBD at ± 20 du/ha.

Graph C3-d compares the number of residential units in each of the districts between 2012 and 2018. There is consistent growth in the number of dwelling units in all eight of the districts.

- Across the city, the number of formal residential dwellings increased by ±175 000 (23%) between 2012 and 2018.
- Both the Southern and KMPGBD districts saw an increase of ± 30% over the six-year period.
- The Helderberg, Northern and Blaauwberg districts all saw increases of over 20%. The remaining districts all saw increases of over 15%.

Graph C3-e displays the average unit size per district between 2012 and 2018. The trends here are more unique to each district.

- Citywide, the average unit size increased from 134 m² to 140 m² (an increase of ± 4%).
- While unit sizes increased slightly across all the planning districts, the rate of increase seems to have decreased/reversed after 2015.
- The Southern, Helderberg, Table Bay and Northern districts have the highest average unit sizes ranging from ± 189 m² to ± 155 m². The KMPGBD Districts has the lowest average unit size of ± 70 m².

SYNTHESIS

There is a substantial increase in formal residential dwellings throughout the city. It is interesting to note the distinction between growth in formal residential units, which is fairly consistent and significant across the entire city (increasing by between 15% and 31% over the six-year period) and the change in average gross density per district which, while increasing overall across the city, is not increasing to the same extent in each district (this ranges between 0% and 24% per district). Districts on the periphery of the city are continuing to exhibit lower density, sprawling development.

C.3

LAND AND BUILDING DEVELOPMENT

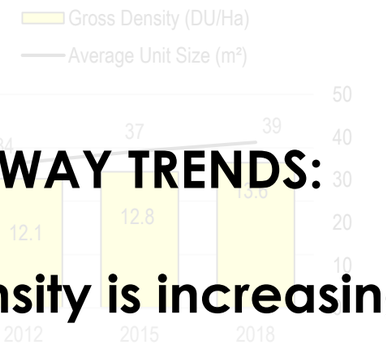
FORMAL RESIDENTIAL DENSITY (METRO-WIDE)

This indicator shows a change in **gross residential density** over time (2012-2018) as captured in the City's General Valuation Rolls (**formal dwellings** only).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Roll 2012, 2015 and 2018

KEY TAKE-AWAY TRENDS:

- **Gross density is increasing gradually.**
- **Continued new development in the northern areas** of the city due to availability of vacant land.
- **Conversion from non-residential to residential in nodes** across the city due to the poor performance of the office sector. This is already starting to take place in areas such as the **CBD and Woodstock and Salt river.**
- **Continued land use intensification** of existing residential land uses (i.e. from single residential development to flats) especially **in development corridors and nodes.**



Graph C3-a: **Change in gross residential density (formal only).**

Graph C3-b: **Formal residential dwellings.**



Map C3-a: **Change in gross residential density (2012 to 2018).**



Map C3-b: **Gross residential density (2018).**

C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE

This indicator shows the change in square metres of building floor area in respect of non-residential land use as captured in the City's General Valuation Rolls (2012, 2015, 2018). Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018

OVERALL TREND

Non-residential land use increased, overall pointing to economic growth over the period analysed. It is important to note that the vacancy factor is not taken into consideration and that this is only an indication of change in actual floor space.

SPATIAL TREND (DISTRIBUTION/PATTERN)

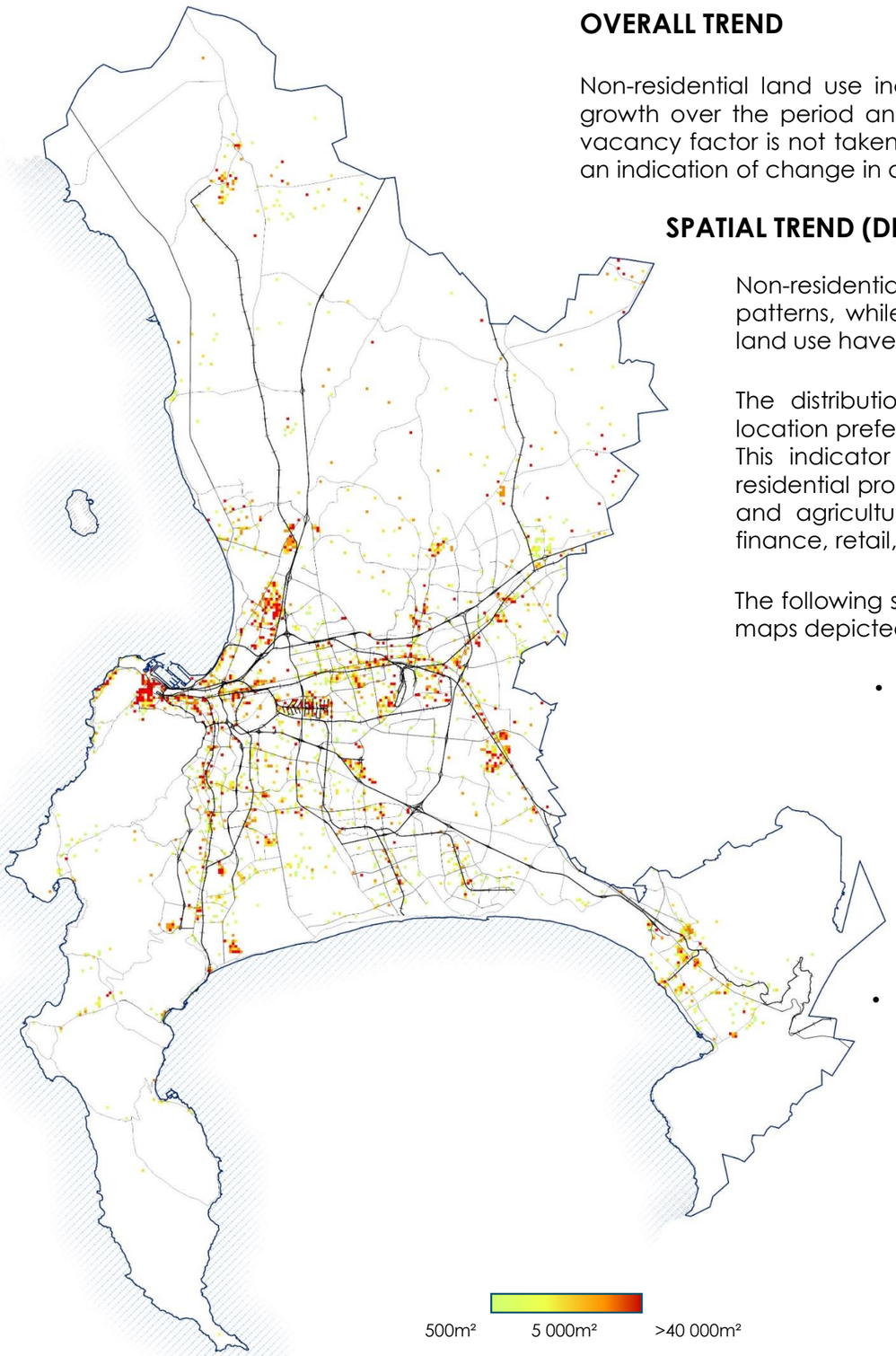
Non-residential development reinforces existing patterns, while limited new clusters of non-residential land use have emerged.

The distribution of non-residential land use reflects location preferences of the various underlying sectors. This indicator does not analyse the different non-residential property sectors, e.g. retail, office, industrial and agriculture or different economic sectors, e.g. finance, retail, manufacturing, etc.)

The following spatial trends can be observed from the maps depicted in this section of the report:

- The greatest increase in non-residential development occurred within the city's development corridors (Voortrekker Road and the Southern Corridor) and key employment nodes (CBD, Century City, Bellville, Epping, Somerset West CBD, Blue Downs and CTIA). Indicator C7 depicts the types of development (i.e. retail, office and industry) that make up the increase.

- The CBD and Century City experienced the highest increase in non-residential development between 2012 and 2018, when compared to other areas in the metro (largely office and retail – see indicator C7). This is likely a further intensification of existing development and uptake of existing land use rights.

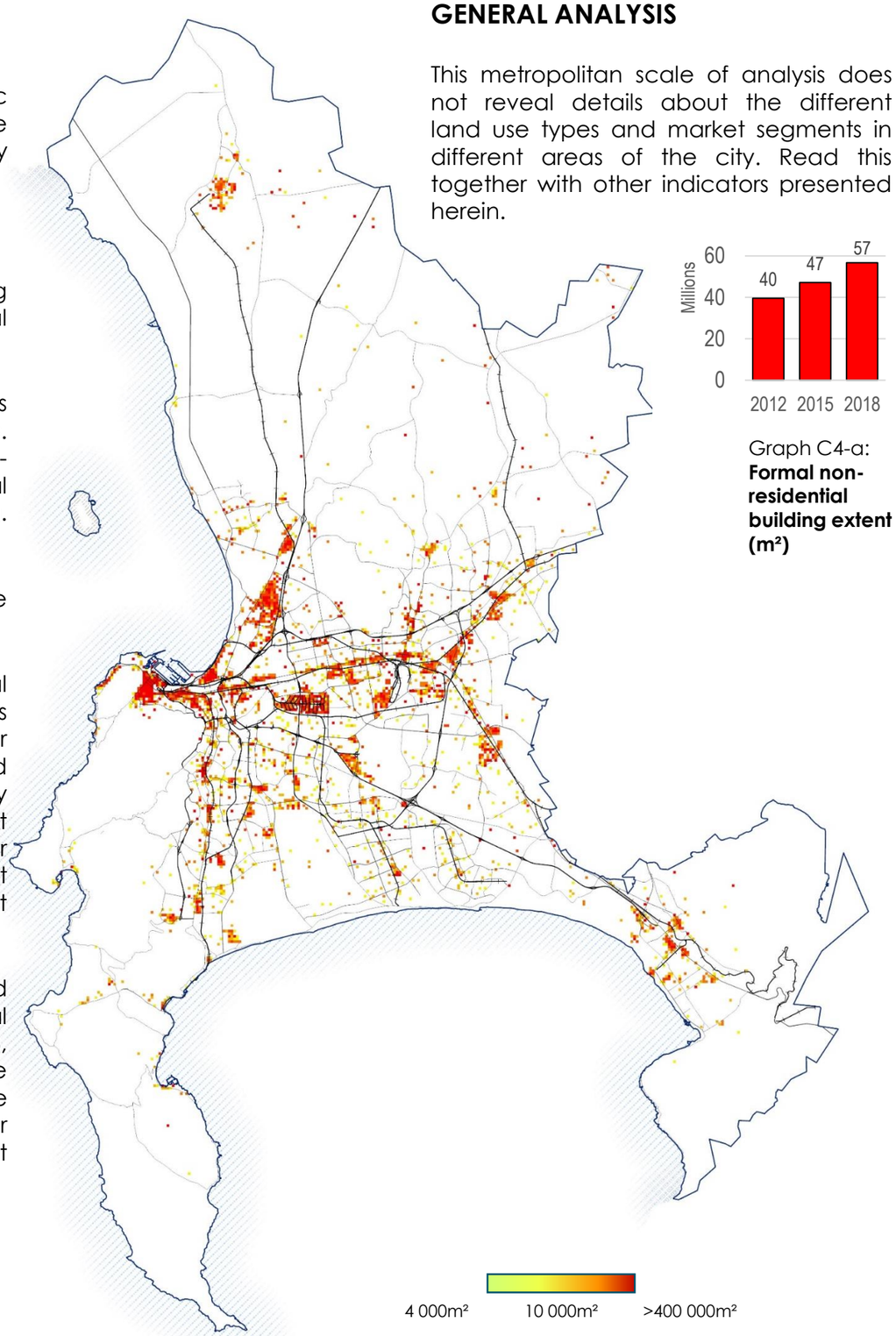


Map C4-a: Change (>500 m²) in non-residential land use in m² (2012 to 2018)

GENERAL ANALYSIS

This metropolitan scale of analysis does not reveal details about the different land use types and market segments in different areas of the city. Read this together with other indicators presented herein.

Graph C4-a: **Formal non-residential building extent (m²)**



Map C4-b: Non-residential land use (>4 000 m²) in m² (2018)

C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE

This indicator shows the change in square metres of building floor area in respect of non-residential land use as captured in the City's General Valuation Rolls (2012, 2015, 2018). Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

KEY TAKE-AWAY TRENDS:

- **Non-residential development reinforces existing patterns**, while limited new clusters of non-residential land use have emerged. The distribution of non-residential land use reflects location preferences of the various underlying sectors.

- The **greatest increase in non-residential development occurred within the city's development corridors** (Voortrekker Road and the Southern Corridor) and **key employment nodes** (CBD, Century City, Bellville, Epping, Somerset West CBD, Blue Downs and CTIA).

- The **CBD and Century City experienced the highest increase in non-residential development** between 2012 and 2018, when compared to other areas in the metro (largely office and retail – see indicator C7).

Map C4-a: **Change (>500m²) in non-residential land use in m² (2012 to 2018).**

Map C4-b: **Non-residential land use (>4 000m²) in m² (2018).**

C.
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LAND AND BUILDING DEVELOPMENT

DIVERSITY OF USE (METRO-WIDE)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Roll 2012, 2015 and 2018

OVERALL TREND

Map C5a-b indicates the change in the ratio between residential and non-residential land uses, and map C5a-b indicates the land use diversity in 2018. While the space used for both residential and non-residential land use increased (see graph C5a-a), the spatial distribution thereof affects the ratio of residential to non-residential land use in specific locations.

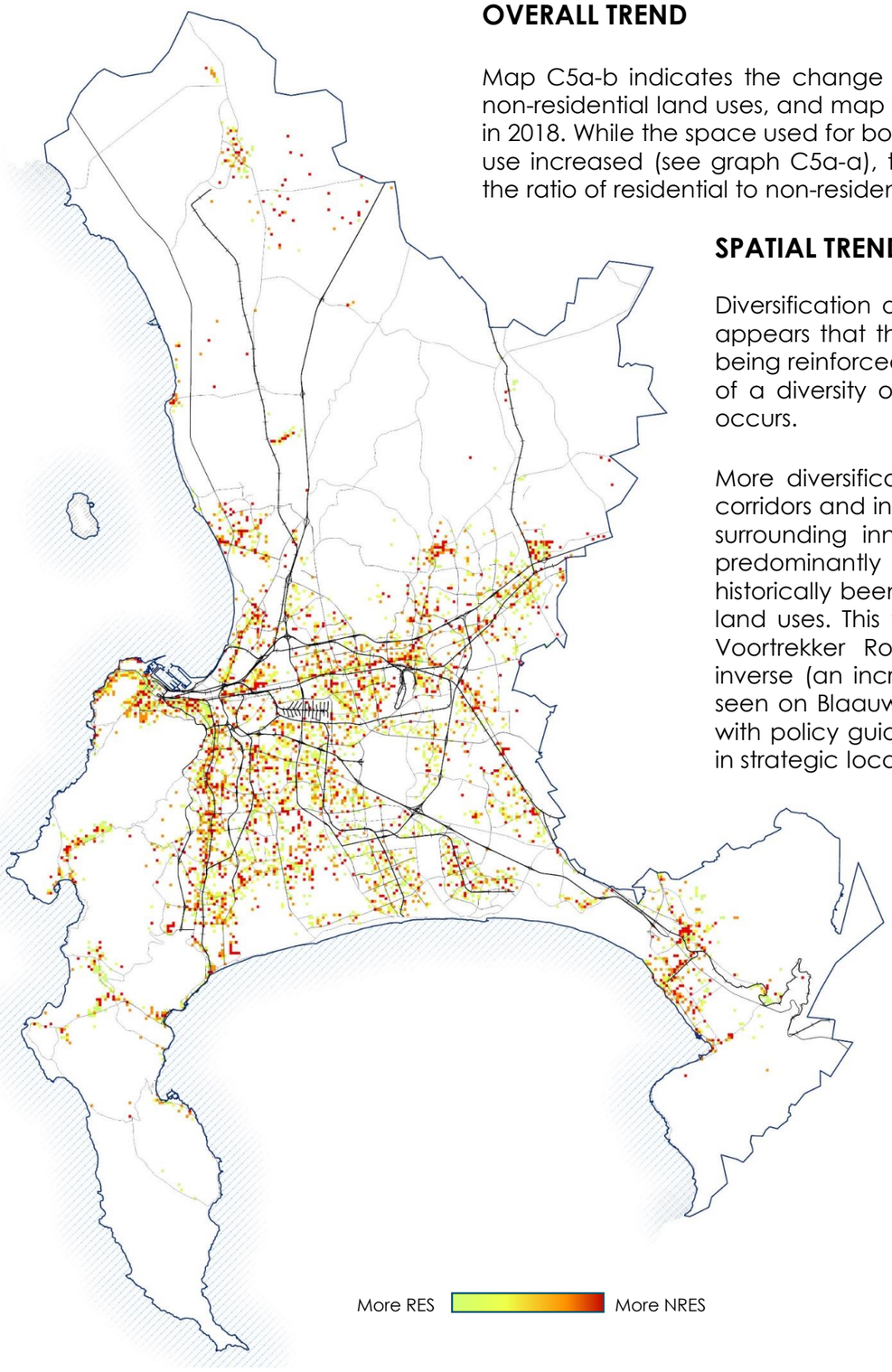
SPATIAL TREND (DISTRIBUTION/PATTERN)

Diversification of use occurs on a city-wide scale. It appears that the existing land use diversity is largely being reinforced, which points to a greater clustering of a diversity of activities in areas where it already occurs.

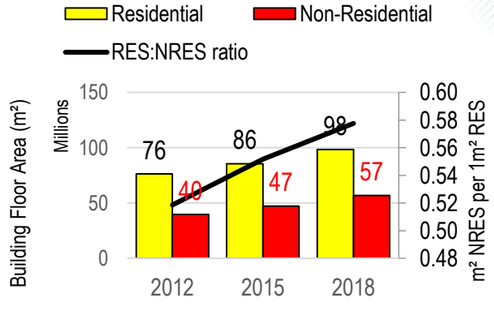
More diversification occurred around development corridors and in nodes. Development in the CBD and surrounding inner city areas since 2012 has been predominantly residential uses, in what have historically been areas dominated by non-residential land uses. This trend is also visible along portions of Voortrekker Road towards Bellville CBD and the inverse (an increase in non-residential uses) can be seen on Blaauwberg Road. These observations align with policy guidance that seeks to diversify land use in strategic locations.

GENERAL ANALYSIS

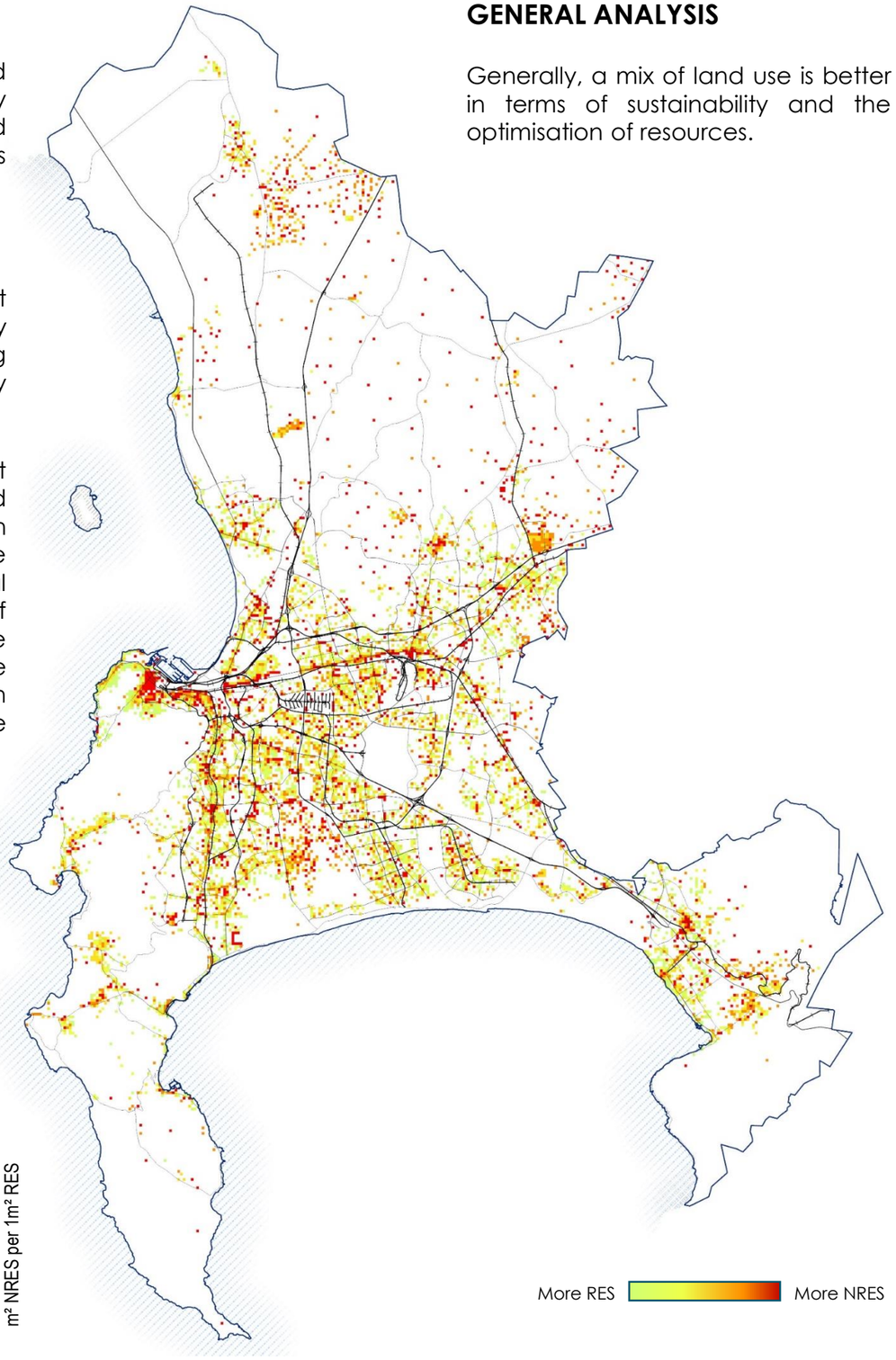
Generally, a mix of land use is better in terms of sustainability and the optimisation of resources.



Map C5a-a: Change in land use diversity (2012 to 2018)



Graph C5a-a: Change in non-residential to residential ratio



Map C5a-b: Residential vs Non-Residential land use (2018)

C.
5a

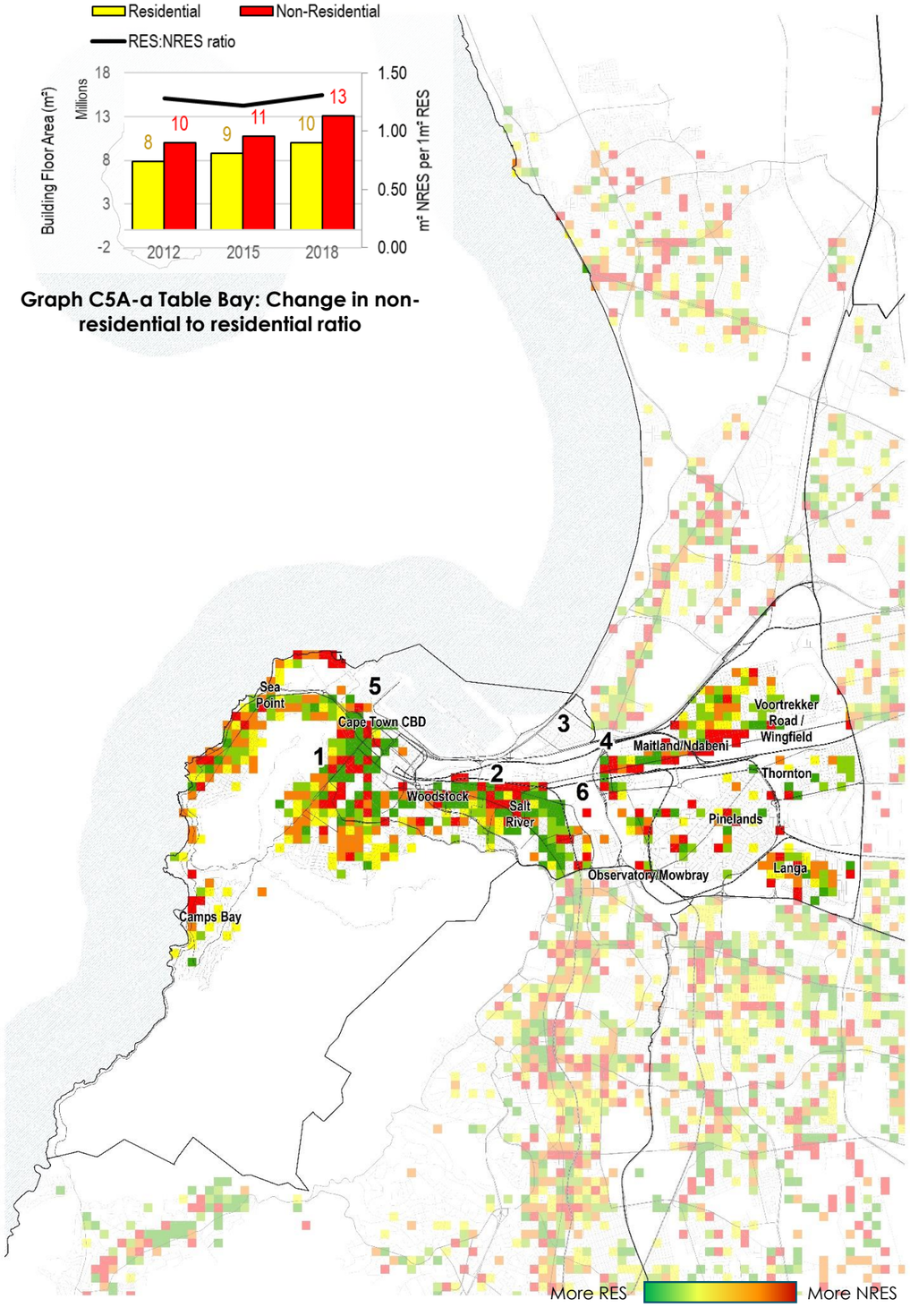
LAND AND BUILDING DEVELOPMENT

DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)

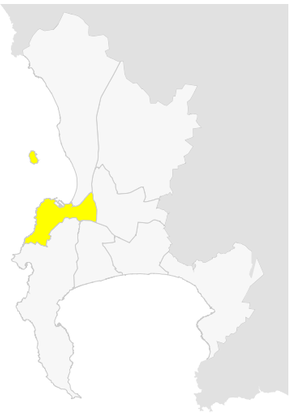
Graph C5A-a Table Bay: Change in non-residential to residential ratio



Map C75-a Table Bay: Change in land use diversity (2012 to 2018)

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)



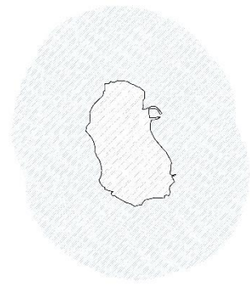
ALIGNMENT TO SPATIAL POLICY

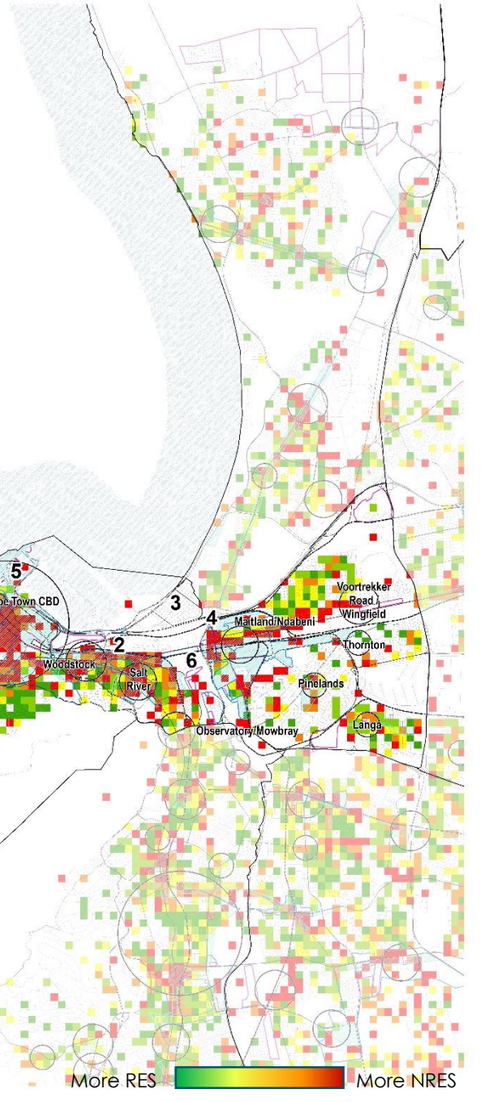
The change in land use between 2012 and 2018 correlates with areas identified for mixed-use intensification. It can be noted that the changes occurred mostly along higher- and lower-order development corridors and nodes where mixed-use intensification is supported.

LOCAL LEVEL TRENDS

The section below highlights the areas where a significant change in land use was observed, with well-balanced diversity along public transport routes and within district nodes (e.g. CBD/Foreshore).

1. CBD/Foreshore – Grade 3 office to residential conversions are evident (i.e. The Duke; 1 Thibault Square), corner of Adderley and Riebeek streets, Harbour Arch – significant residential in office Precinct, also Rockerfeller and Onyx.
2. Woodstock – conversion of ageing factory buildings to mixed use with residential - mainly along Albert Rd, but also around Pickwick St and Brickfield Rd.
3. Paarden Eiland – conversion of industrial to mixed use along Marine Drive evident.
4. Maitland – prime apartment building, conversion from industrial to residential – Blue Buck developer converting entire Maitland Metro precinct from industrial to residential (i.e. 1 200 residential 50 000 m2 non-res bulk). Other developers showing interest along Voortrekker Road Corridor.
5. Waterfront – canal precinct mixed use development profile includes office, residential, retail, hotel and education accommodation.
6. River Club – mixed use on Greenfield site Precinct 1, approximately 60 000 m² total floor space (mixed use: retail, office and residential) and Precinct 2 approximately 90 000 m² total floor space (Amazon: ± 70 000 m², Private School: ± 10 000 m², Office: ± 10 000 m²)





Map C5A-b: Table Bay Residential vs Non-Residential land use (2018)

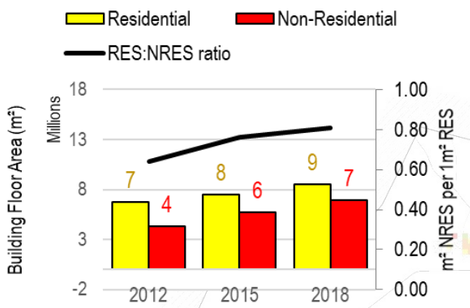
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LAND AND BUILDING DEVELOPMENT

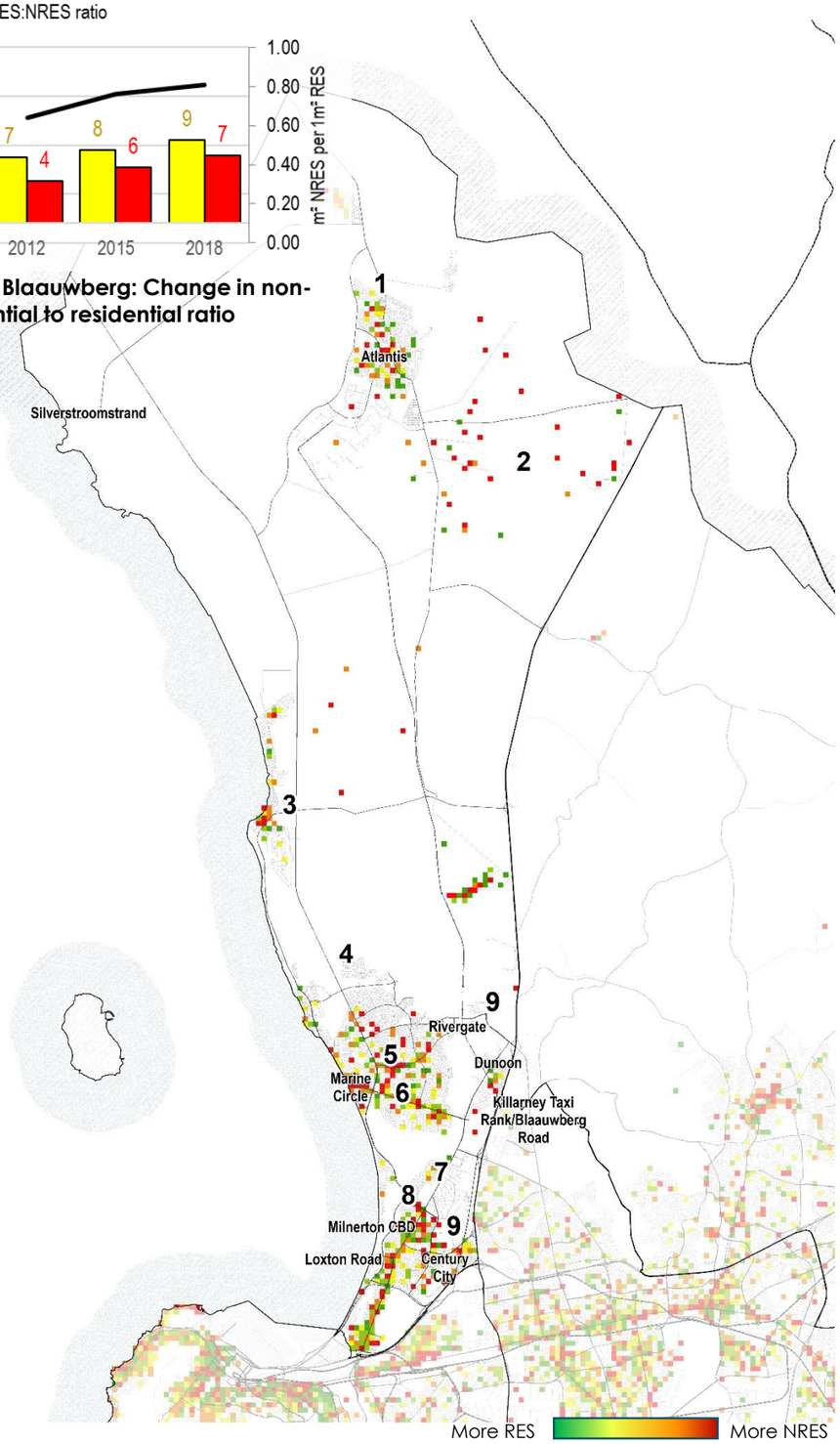
DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)



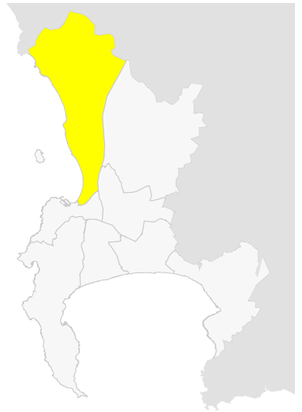
Graph C5A-a Blaauwberg: Change in non-residential to residential ratio



Map C5A-a Blaauwberg: Change in land use diversity (2012 to 2018)

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)



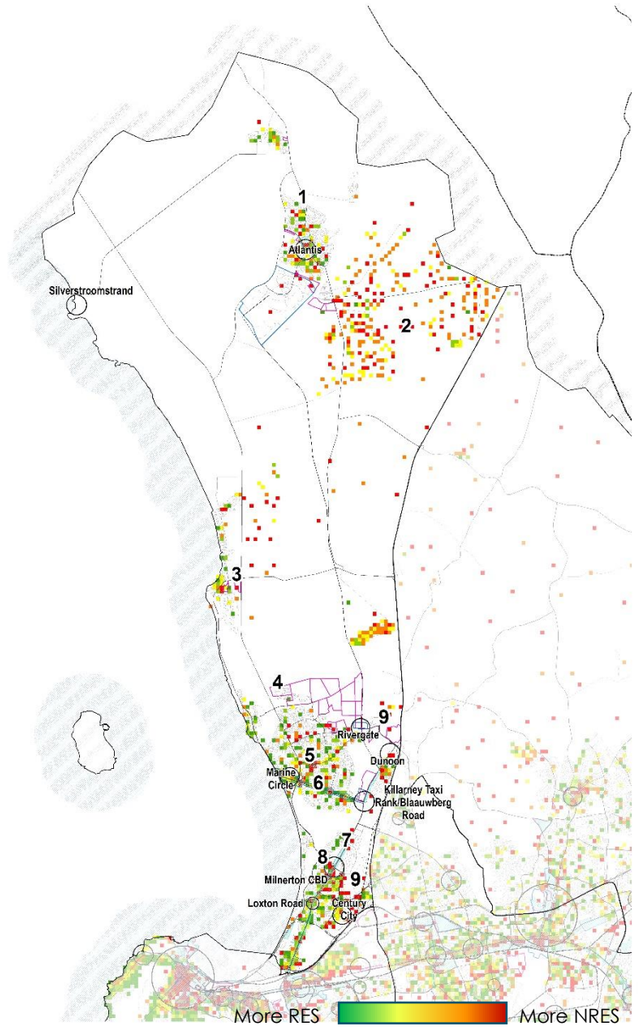
ALIGNMENT TO SPATIAL POLICY

-The change in land use between 2012 and 2018 correlates with areas identified for mixed use intensification. Generally, diversification is happening in nodes and corridors, except industrial in which the trend of an industrial corridor along Koeberg Road going north has continued, in line with the industrial SPC.

LOCAL LEVEL TRENDS

The section below highlights the areas where a significant change in land use was observed, with diversification happening in nodes and corridors.

1. Atlantis has seen a mix of land uses, more non-res in the centre of the town (CBD area, which is a local node) and res in the suburbs, aligned to policy NDAs.
2. Klein Dassenberg smallholding area predominantly more residential than non-residential. Tourism applications, guesthouses and small-holding activities additions to farms with houses. Aligned to policy of the time.
3. Melkbosstrand – non-residential land use increased along beachfront and increase in retail in town centre. Broadly in line with policy.
4. Large regional retail added in Sunningdale – Table Bay Mall. On a lower-order corridor. Not fine grained mix of land use, not a nodal area or MUI.
5. Infill development of vacant land at Link Rd/Parklands Main intersection as business area and retail area 2012-2018 (i.e. a MUI area).
6. Blaauwberg Road – trend of more non-res diversification at nodal points including Marine Circle (additional office 2018-2022), and residential in-between. Overall still more residential in the corridor. Aligned with policy but not large scale changes.
7. Koeberg Road – good mix of residential and non-residential change, including office and industrial more than retail, aligned with corridor and MUI.
8. With a high concentration of non-res (retail) at Racecourse Road/ Koeberg intersection.
9. Industrial corridor up east of Koeberg Road has continued north.



Map C5A-b Blaauwberg: Residential vs Non-Residential land use (2018)

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LAND AND BUILDING DEVELOPMENT

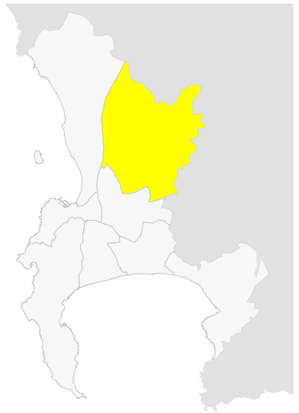
DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)



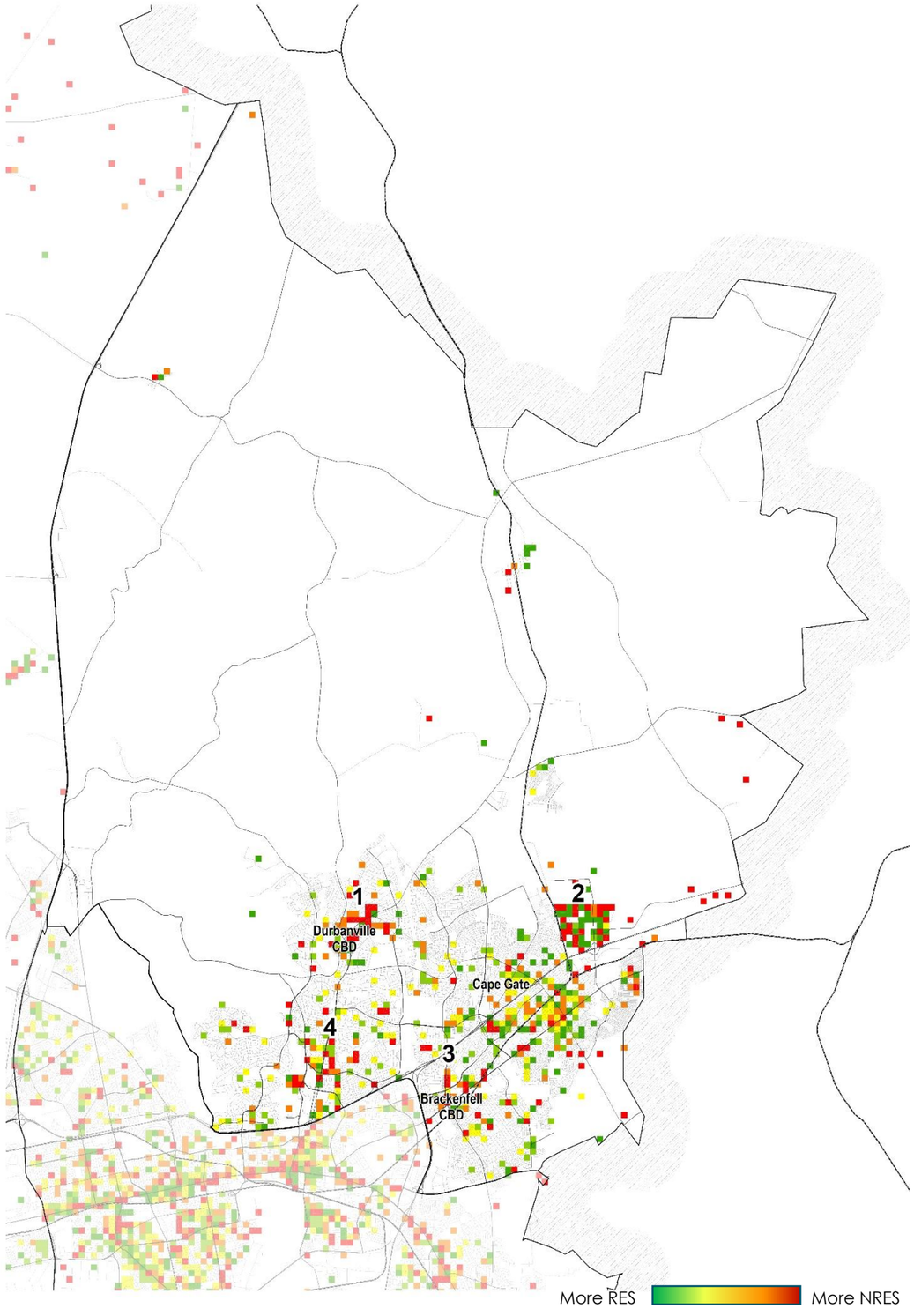
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2018 correlates with areas identified for mixed-use intensification as ascribed to proposals in the 2012 Northern District Plan.

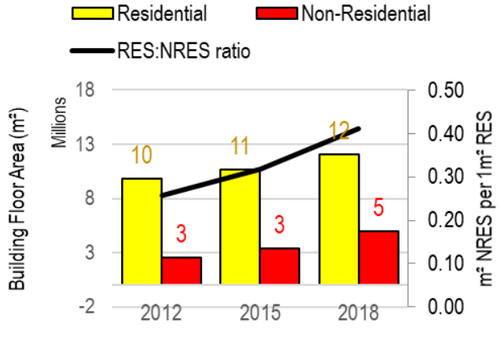
LOCAL LEVEL TRENDS

The section below highlights the areas where a significant change in land use was observed, which contributed to noteworthy diversification.

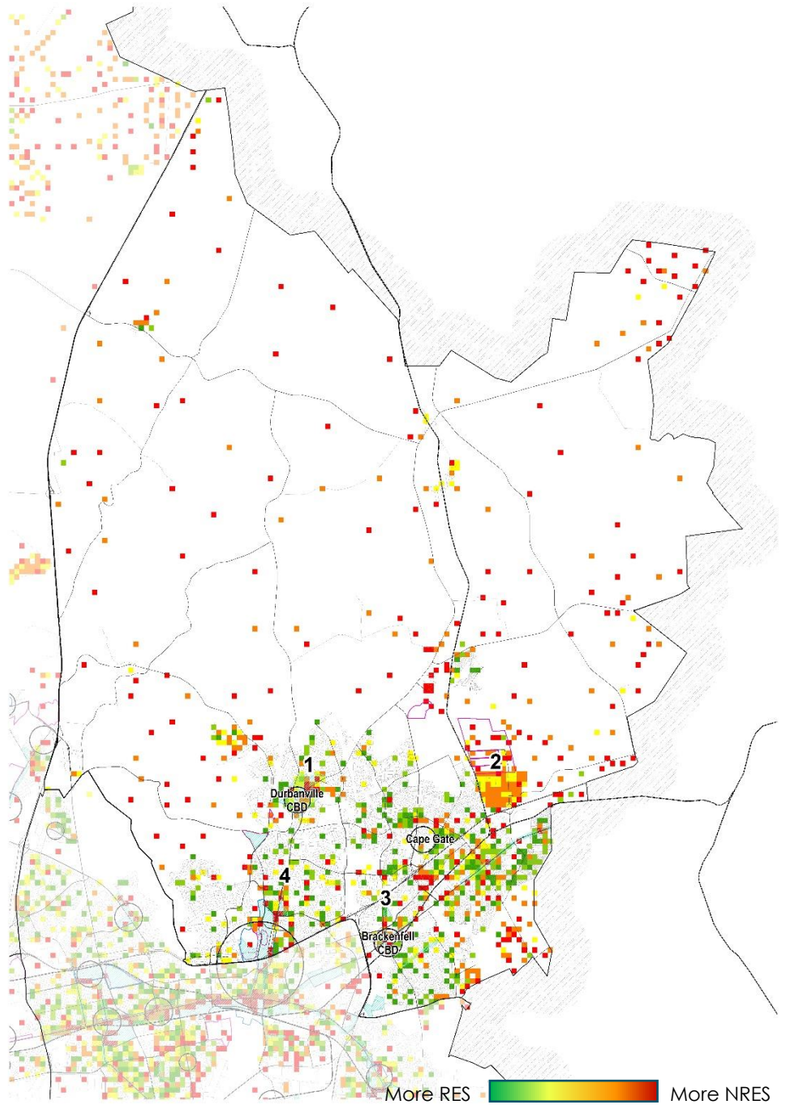
1. Durbanville secondary CBD: Change from SR1 to either GR1- 3 (group housing), and/or commercial at ground level, and higher-density residential (flats) on top, as prescribed in sub-district development guidelines. Implementation since 2012 District Plan.
2. Joostenbergvlakte smallholdings: Extensive change in land use towards non- residential may be ascribed to temporary land use departures (rural zoning). No change in density, but rather diversity.
3. Change in land use to small-scale offices in Aurona and Springbok Park (Brackenfell) as prescribed by policy guidelines adopted by Bergdal Subcouncil(2). Reference is made to policy guidelines in both the 2012 and 2023 District Plan (sub-district development guidelines).
4. Rosenpark (Bellville): Change from remaining SR1 to commercial. Described in 2012 District Plan.



Map C5A-a: Northern Change in land use diversity (2012 to 2018)



Graph C5A-a Northern: Change in non-residential to residential ratio



Map C5A-b Northern: Residential vs Non-Residential land use (2018)

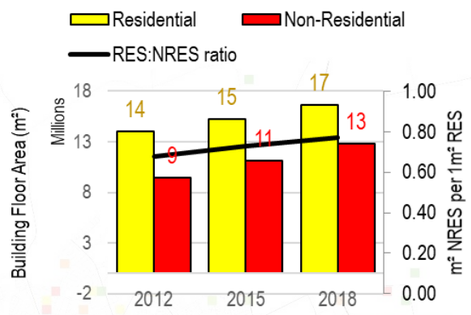
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LAND AND BUILDING DEVELOPMENT

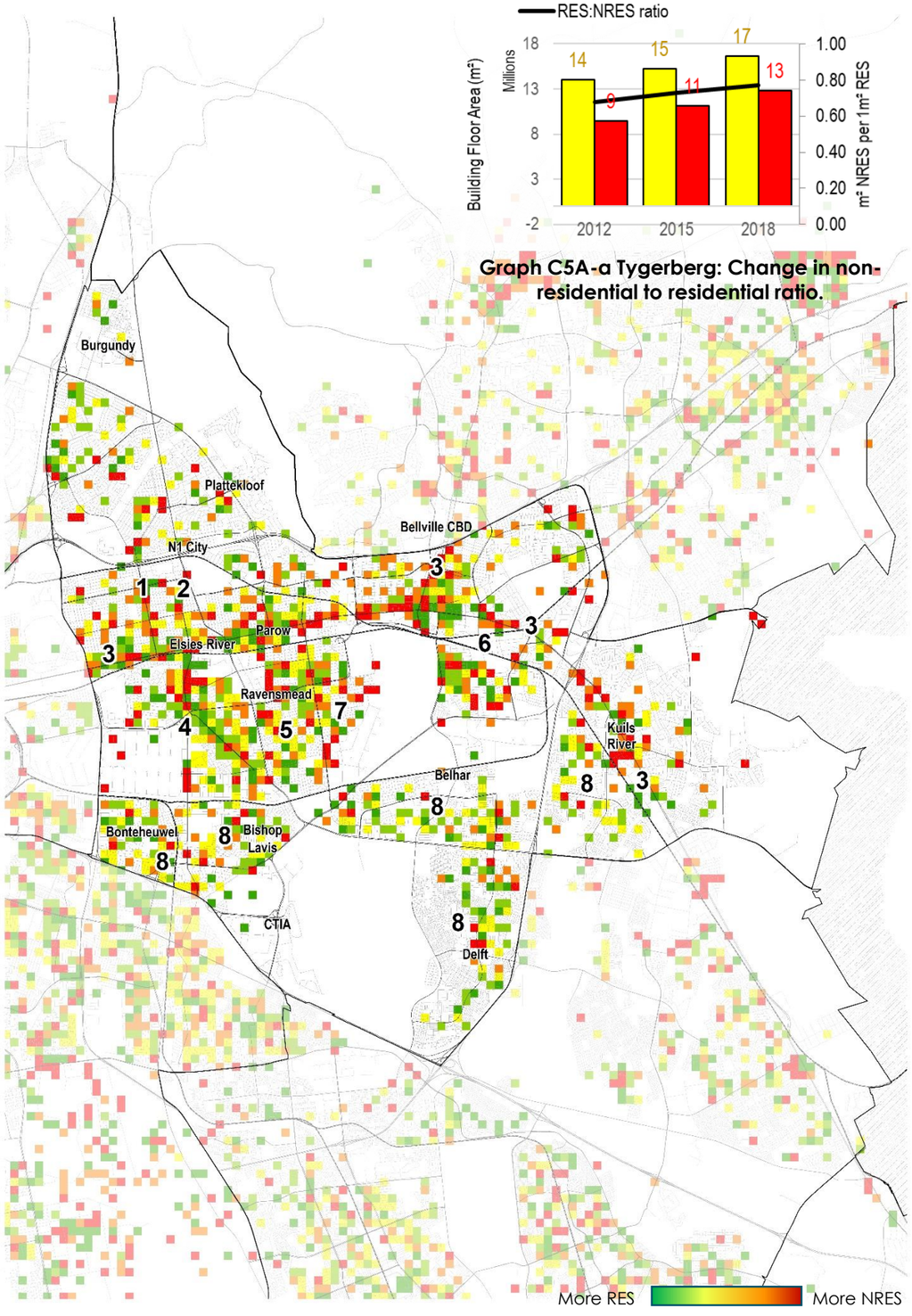
DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)



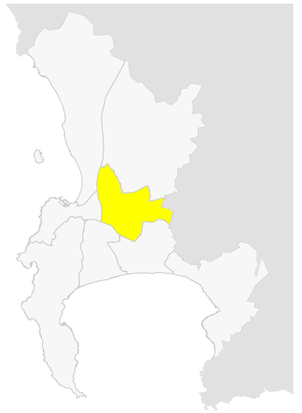
Graph C5A-a Tygerberg: Change in non-residential to residential ratio.



Map C5A-a Tygerberg: Change in land use diversity (2012 to 2018)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



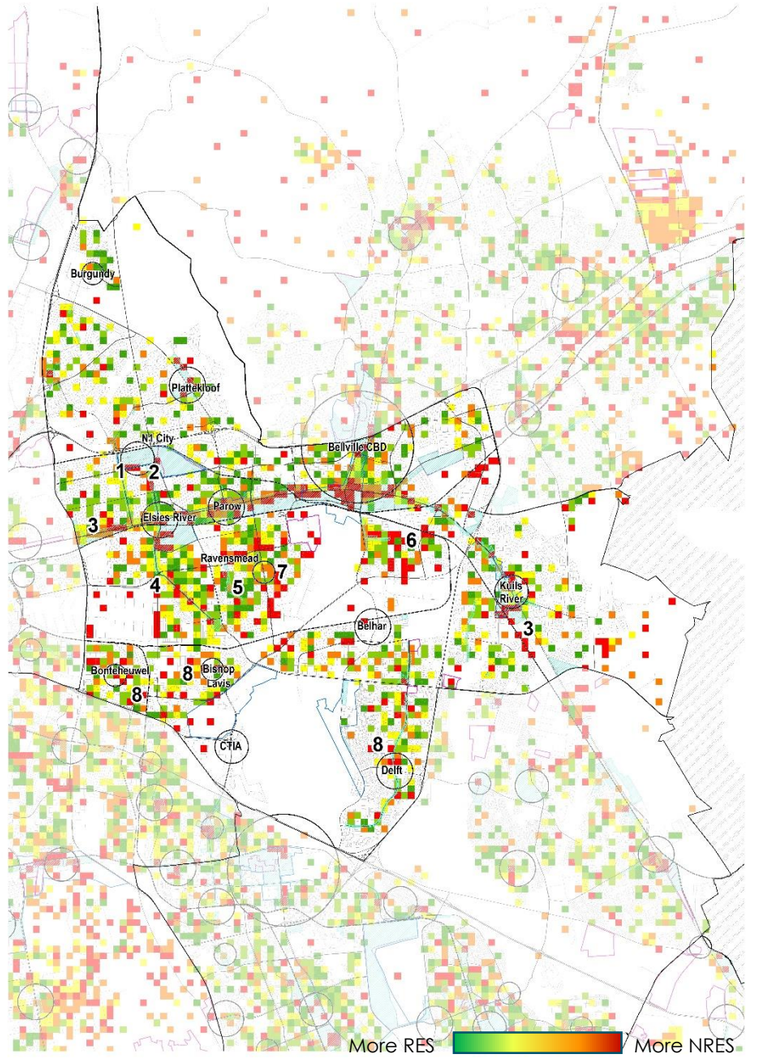
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2018 correlates with areas identified for mixed use intensification. It can be noted that the changes occurred mostly along higher and lower order development corridors i.e. Voortrekker Road, Halt Road and Delft Main Road as well as in nodal areas such as Bellville, Kuils River, Parow and Elsies River, where mixed use intensification is supported.

LOCAL LEVEL TRENDS

The section below highlights the areas where a significant change in land use was observed, with well-balanced diversity along public transport routes. In general, the majority of the established suburbs have seen development of a residential nature (e.g. Bonteheuwel, Bishop Lavis, Belhar, Sarepta and Delft – D8 on map). However, within these suburbs, non-residential uses concentrate in high-accessibility areas such as the Delft CBD and along Belhar Main Road.

1. and 2. Significant change in land use diversity is occurring along Vasco Boulevard and Hugo Street, both local development corridors where mixed-use intensification is promoted. Redevelopment includes commercial and low-rise apartments (3 – 4 storeys).
3 Significant change in land use patterns along the Voortrekker Road Corridor (VRC) with a stronger residential mix between Jakes Gerwel Drive and McIntyre Road. The portion from De La Rey Road through Bellville (incl. Durban Road) and Kuils River shows a more balanced mix of land uses with the intensity decreasing toward Kuilsriver.
4 Mixed land use occurs along the northern portion of Halt Road (lower-order development corridor).
5. Mixed land use occurs along Connaught Road (lower order development corridor) where mixed use intensification is supported.
6. Bellville South shows balanced residential (including student housing) and non-residential land uses. The non-residential uses occur along major transport routes (i.e. Robert Sobukwe and Kasselsvlei Roads) and within the Sacks Circle industrial area.
7. Ravensmead shows a balanced mix of land uses. The non-residential uses occurring along major transport routes (i.e. De La Rey Road) include the Beaconvale and Parow industrial areas.



Map C5A-b Tygerberg: Residential vs Non-Residential land use (2018)

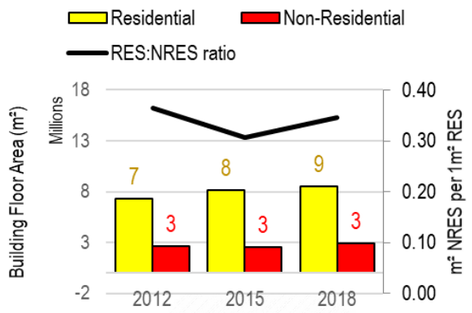
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LAND AND BUILDING DEVELOPMENT

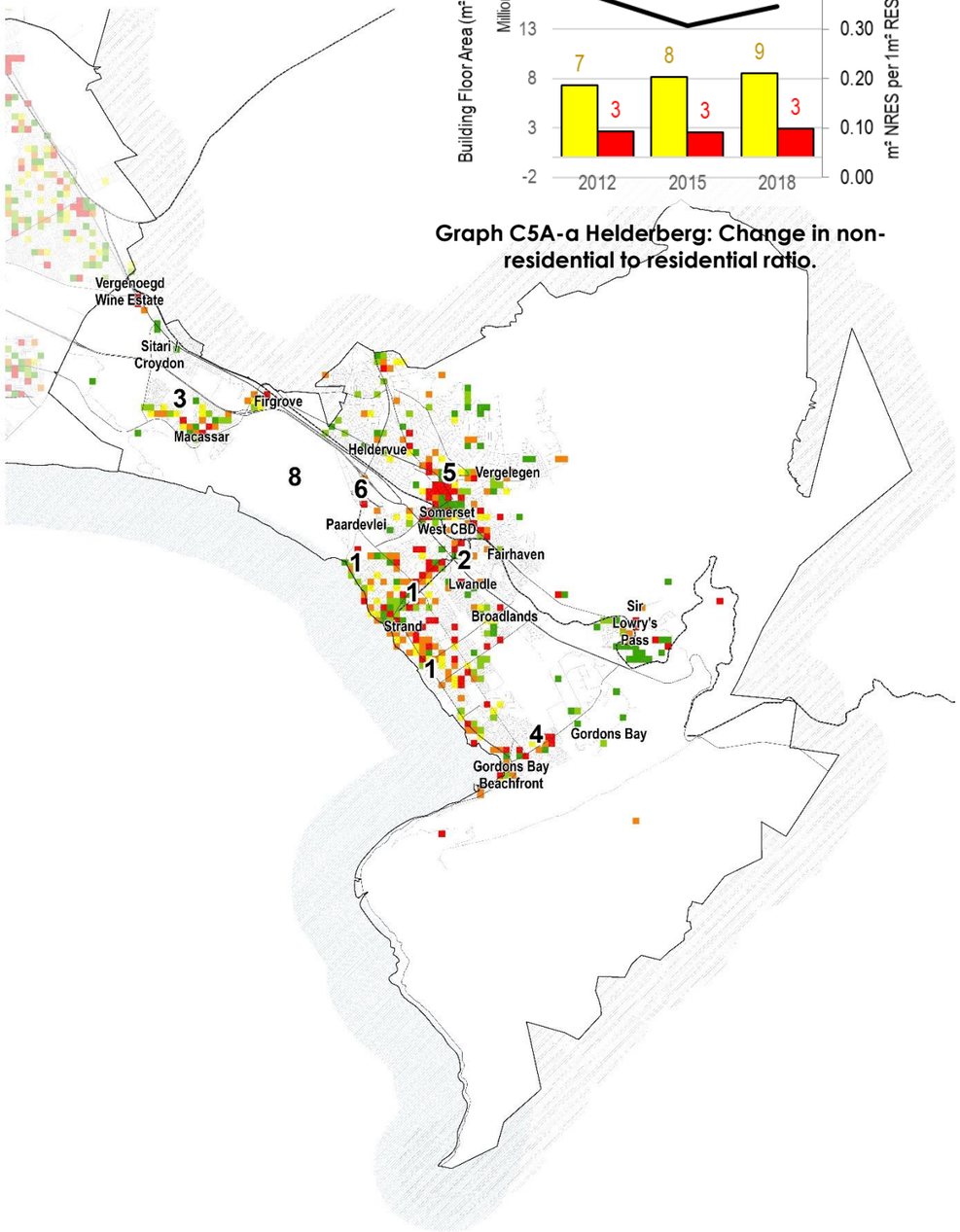
DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)



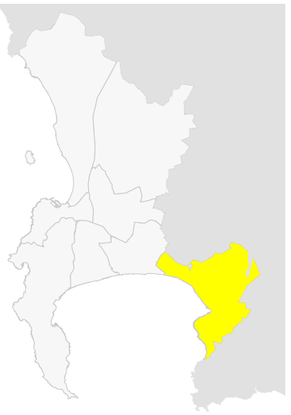
Graph C5A-a Helderberg: Change in non-residential to residential ratio.



Map C75-a Helderberg: Change in land use diversity (2012 to 2018)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)



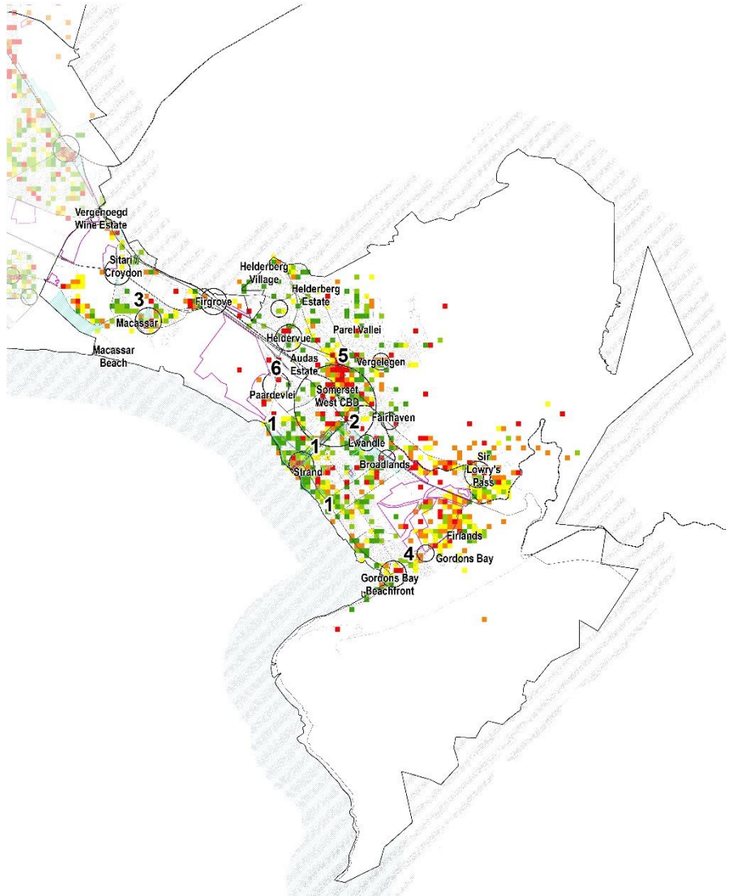
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2018 correlates with areas identified for mixed use intensification. It can be noted that the changes occurred mostly along higher and lower order development corridors, i.e. Main Road.

LOCAL LEVEL TRENDS

The section below highlights the areas where a significant change in land use was observed, with well-balanced diversity along public transport routes.

1. Significant increase can be seen along Main Road towards Strand and along Beach Road from Paardevlei through to the Strand Pavilion and towards Gordon's Bay. This is due to completed office developments in 2016/17 Furthermore, completed industrial developments occurred in 2016 and 2018.
2. Increase in mixed-use intensity along Solomon Street – high density. This is due to a combination of non-residential development completed.
3. A mix of land uses occured in Macassar around areas with public amenity evident by retail, office and industrial submissions.
4. A mix of non-res can be seen along Sir Lowry's Pass Road, with scattered non-res within the Gordon's Bay development area due to completed development.
5. An increase in the mix of non-res uses within the district node around the Somerset West CBD. This is due retail developments in 2016, 2018 and 2019, such as Vergelegen Plein Shopping Centre and industrial development in 2016 and 2018. Also, this is due to office development submissions in 2016/17 and completed office and unclassified developments in 2018, 2019 and 2020/21 and completed retail developments.
6. Paardevlei has seen a increase in density due to a mix of non-res development.



Map C5A-b Helderberg: Residential vs Non-Residential land use (2018)

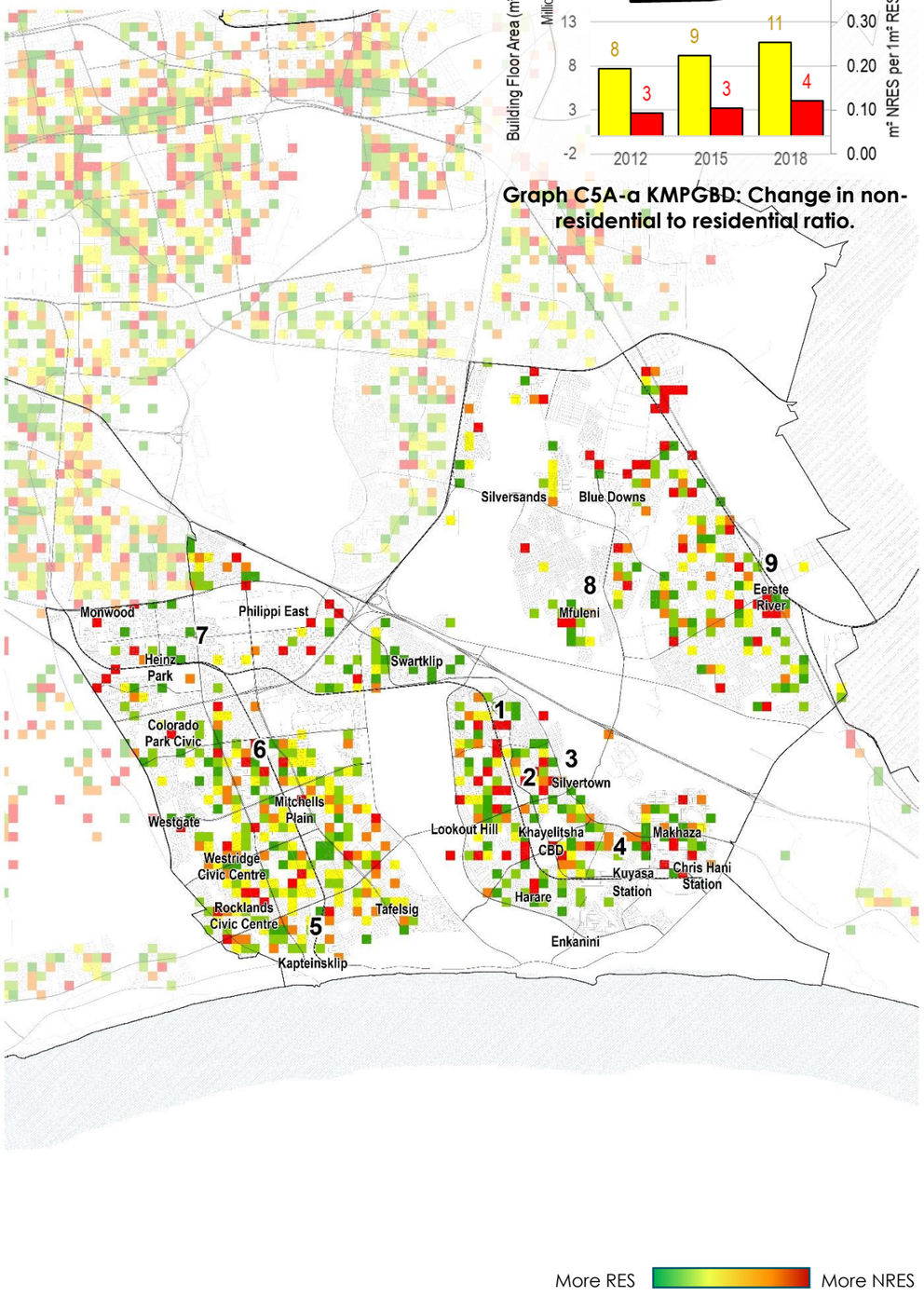
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LAND AND BUILDING DEVELOPMENT

DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)

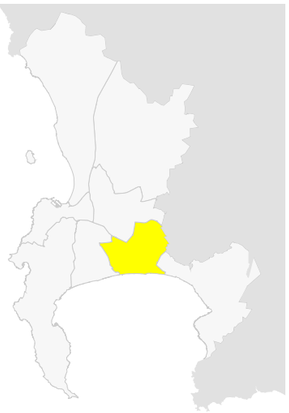


Graph C5A-a KMPGBD: Change in non-residential to residential ratio.

Map C5A-a KMPGBD: Change in land use diversity (2012 to 2018)

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)



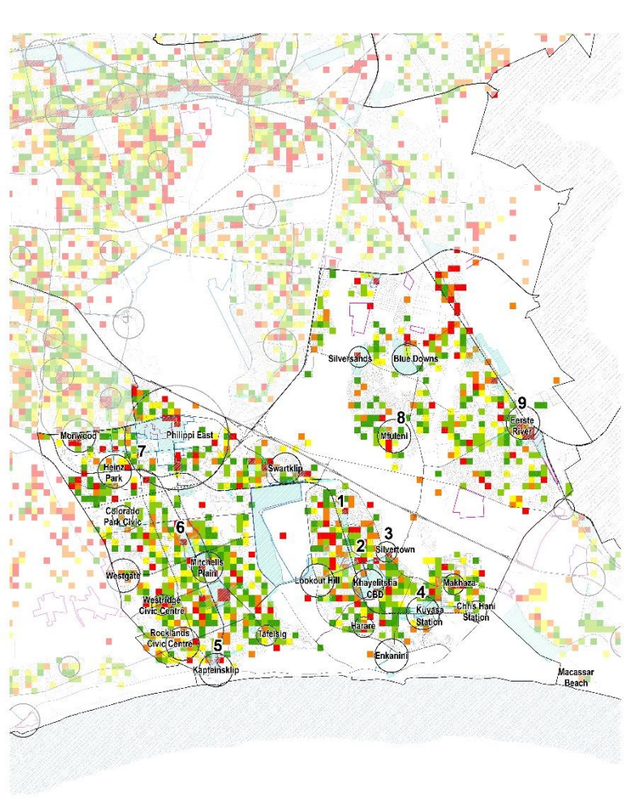
ALIGNMENT TO SPATIAL POLICY

There appears to be a strong correlation between properties located in development corridors and an increase in the diversity of land uses due to their close proximity to nodes and public transport interchanges. It can be deduced that properties have responded positively to their spatial planning designation. However, areas such as the Philippi opportunity area, which was historically targeted by spatial policy for mixed-use development – specifically in support of the Phase 2A corridor – saw limited development in the last 10 years. An increase in land use diversity is concentrated in development corridors. This is evident by the large number of departure and consent use approvals to allow retail in residential dwellings.

LOCAL LEVEL TRENDS

The following local level observations and diversification trends can be made:

1. Nonqubela (site B) – the majority of SR2 zoned properties immediately surrounding the CBD area have been converted to non-res land uses ranging from: restaurants, house shops, liquor stores, printing etc. This that has been largely influenced by their close proximity to a PTI.
2. Spine Road and Khaya – a number of rezoning and consent use applications have been submitted, historically. However, a limited number of approvals were granted on account of outdated spatial planning policy. This has contributed to illegal conversions to restaurants, hair salons, guest houses, etc. The District Plan (2023) has since recognised the area for mixed use intensification.
3. Silvertown – the area currently has a mix of non-res development, which includes a large scale braai meat market, and an anchor retail tenant (Food Town Hyper). Over time, this has attracted other forms of small-scale retail with an uptick of residential to non-res conversions – restaurants, butcheries, hair salons, electricians etc.
4. Kuyasa Station – the area has seen a shift to more small-scale local business uses, such as office space, etc.
5. Kapteinsklip (Kilimanjaro Road) – this area was informed by the 'activity street' designation of the 2012 District Plan, which property owners have responded positively to. The evidence of conversions from residential to business/retail use is apparent (e.g. restaurants, takeaway shops and light industrial use such as panel beaters, etc.)
6. Mitchells Plain town centre (AZ Berman and Morgenster Rd) – the residential properties surrounding the CBD area have experienced a marked conversion to non-residential uses (e.g. medical consultation rooms and office spaces).
7. Mfuleni Node and Main Rd – the CBD/Main road area has seen a number of land use conversions, primarily through unregulated means, which has significantly changed the character of the area.



Map C5A-b KMPGBD: Residential vs Non-Residential land use (2018)

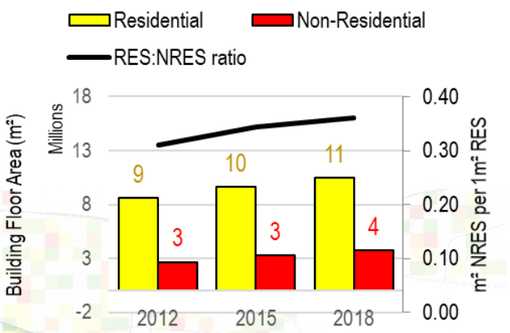
C.
5a

LAND AND BUILDING DEVELOPMENT

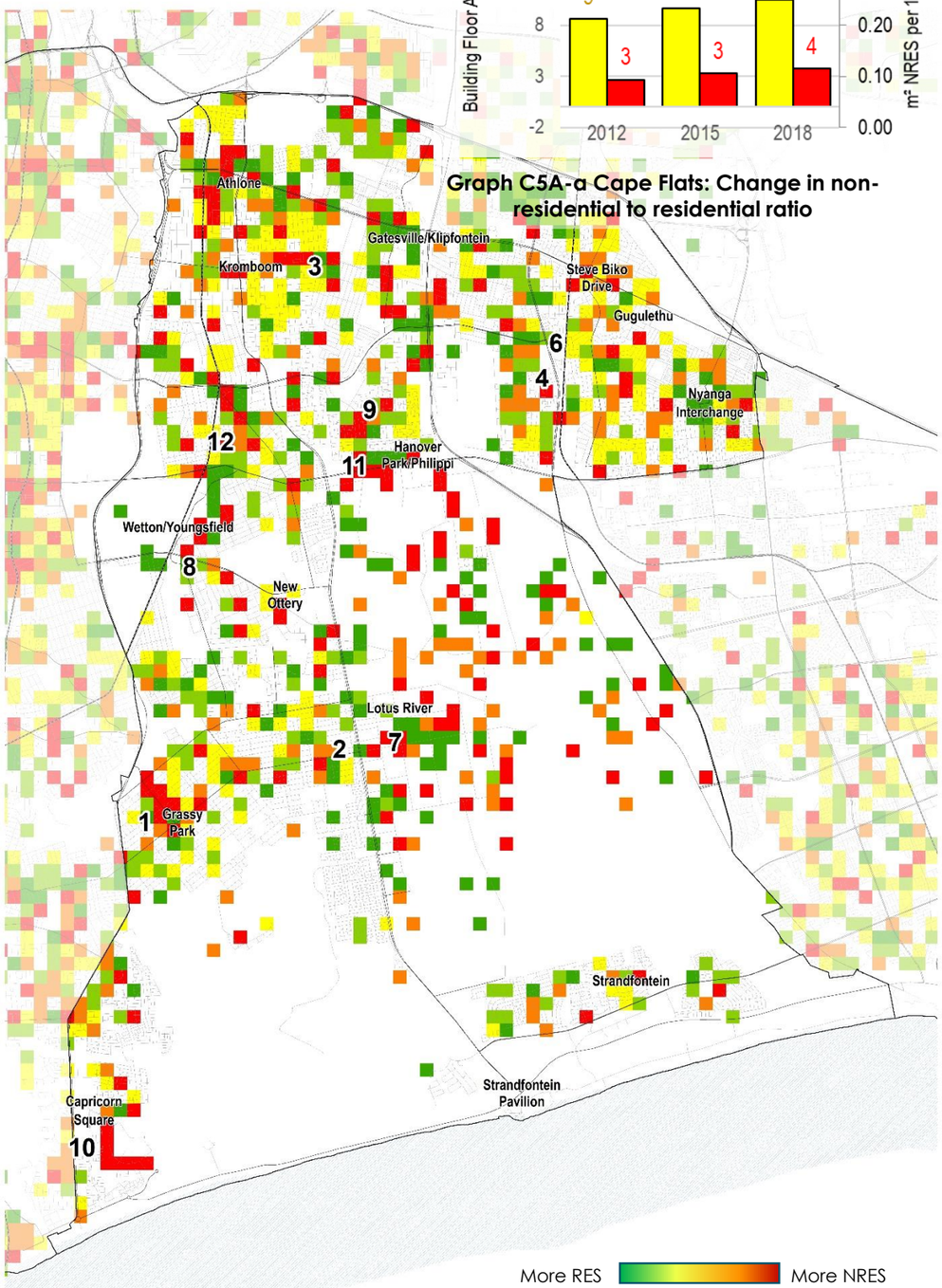
DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)



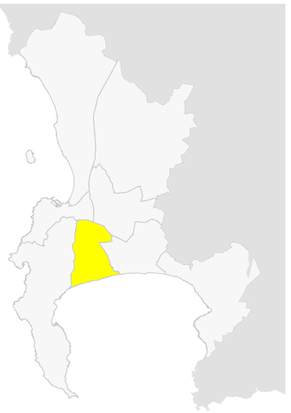
Graph C5A-a Cape Flats: Change in non-residential to residential ratio



Map C5A-a Cape Flats: Change in land use diversity (2012 to 2018)

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)



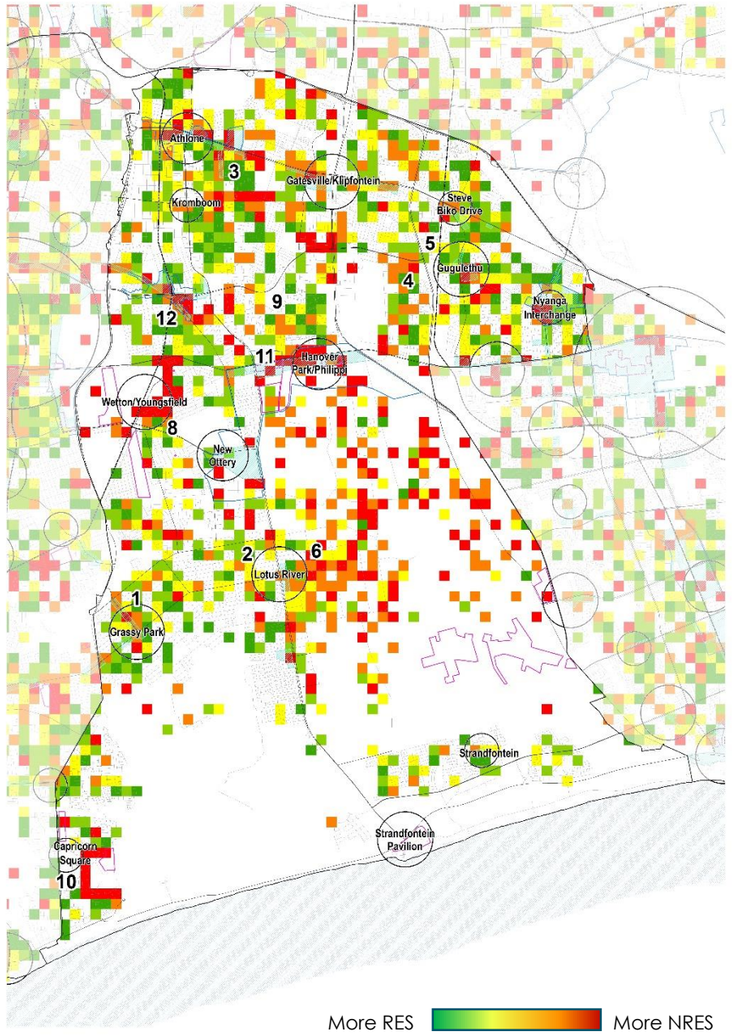
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2018 correlates with areas identified for mixed use intensification in the district. It can be noted that the changes occurred mostly along higher- and lower-order development corridors, i.e. Klipfontein Road and Victoria Road as well as in nodal areas such as Athlone and where mixed use intensification is supported.

LOCAL LEVEL TRENDS

The section below highlights the areas where a significant change in land use was observed.

1. Grassy Park MUIA (Victoria Road) is aligned in terms of the MU designation and has seen an increase in non-res development.
2. Both the Grassy Park and [2] Lotus River nodal areas have seen an increase in diversity, but portions along Klip Road are also showing increased diversity (not aligned to an SPC.)
3. Klipfontein Road corridor – an increase in diversity along and in proximity to this local development corridor, with a particular increase in residential development in the Rylands/Silvertown MUIA and increase in the mix of uses around Belgravia Road in Athlone [G3].
4. Manenberg – there is a significant shift from only residential to non-residential uses in areas such as [3] Penlyn, [4] Manenberg.
5. Gugulethu – same as annotation 4 above.
6. [6] Schaapkraal - same as annotation 4 above.
7. Athlone - significant number of NRES applications completed in 2018/19.
8. Ottery, Grassy Park – same as annotation 7 above.
9. Hanover Park. Both the number of applications submitted and completed have declined in 2021. Office plans submitted and completed have been consistent since 2017 in areas such as Athlone and Ottery.
10. Capricorn Park, Ottery - Applications submitted and completed for industrial buildings.
11. Lansdowne – as per annotation 10.
12. Wetton, Lansdowne Industrial had a high number of NRES applications prior to 2020.



Map C5A-b Cape Flats: Residential vs Non-Residential land use (2018)

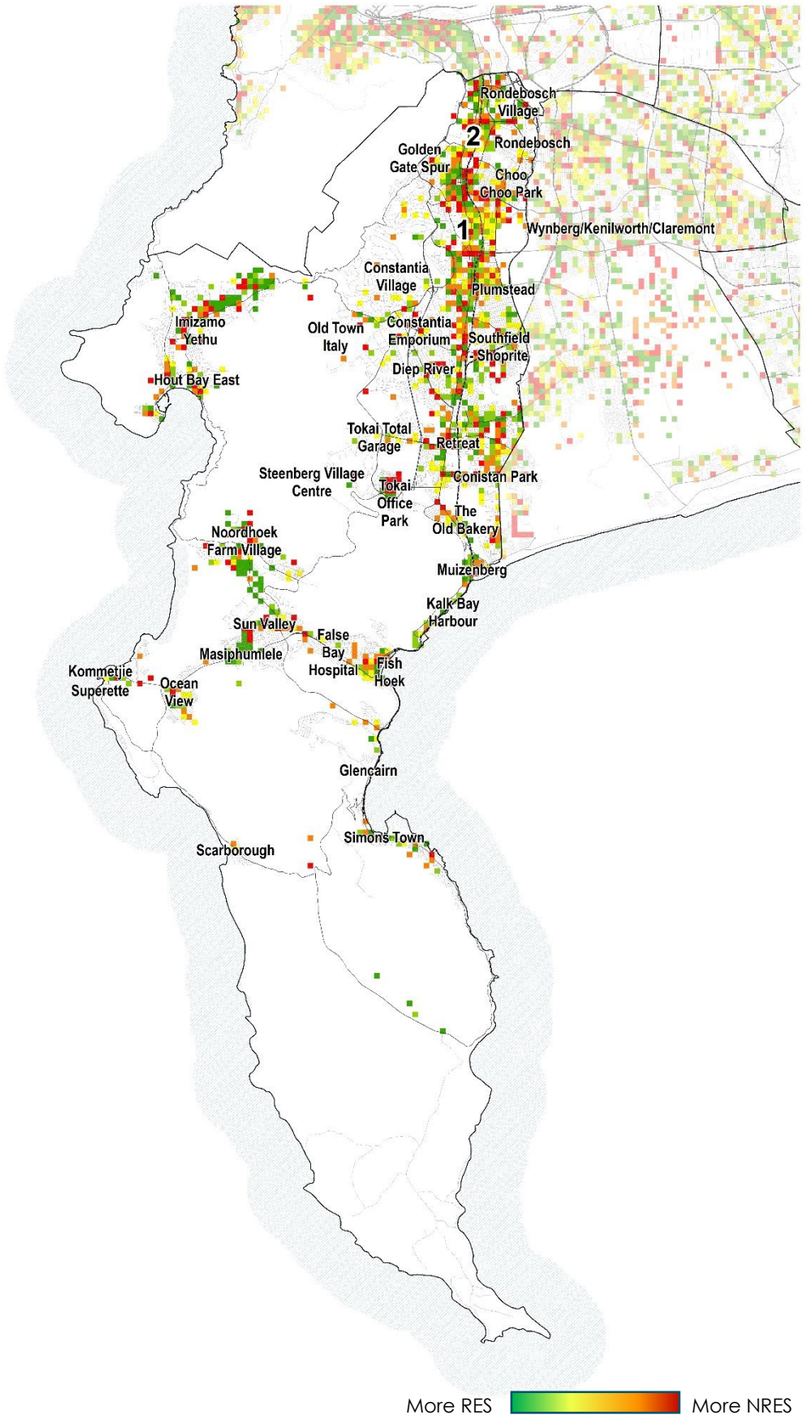
C.
5a

LAND AND BUILDING DEVELOPMENT

DIVERSITY OF USE (DISTRICT)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses.
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: CCT General Valuation Rolls (2012, 2015, 2018)



Map C5A-a Southern: Change in land use diversity (2012 to 2018)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

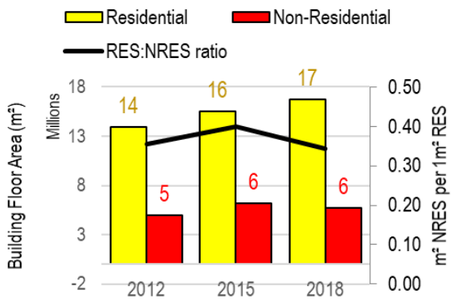
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 – 2018 correlates with areas identified for mixed use intensification within higher order urban nodes.

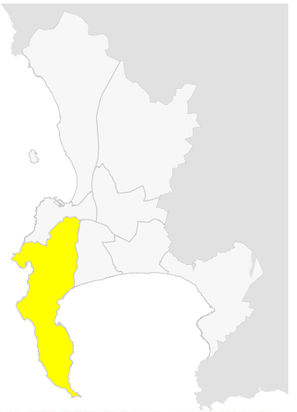
LOCAL LEVEL TRENDS

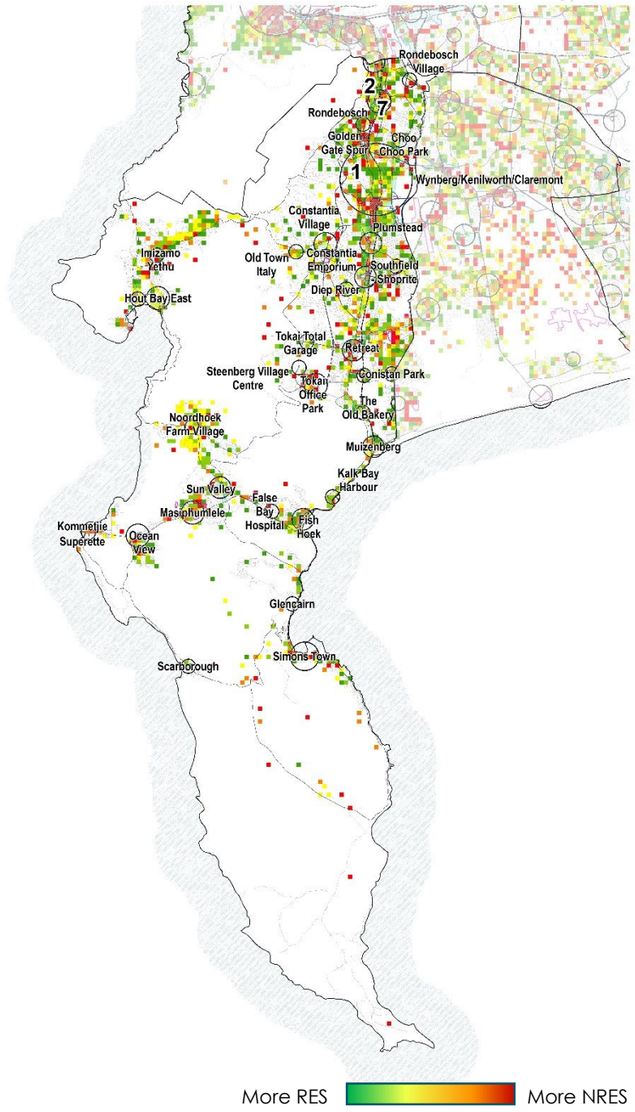
The section below highlights the areas where a significant change in land use was observed, with well-balanced diversity in the nodes. Mixed-use development is almost exclusively concentrated in existing identified mixed-use development areas within higher-order urban nodes. This accords strongly with the high levels of opposition to non-residential development encroachment into exclusively residential areas. Generally, mixed-use in these identified mixed-use areas has comprised single purpose/use buildings of different types rather than mixed-use buildings.

1. Claremont – mixed-use building development has been observable primarily in this highest order node in the district
2. Rondebosch – mixed-use building development has been observable here as well but to a lesser extent.



Graph C5A-a Southern: Change in non-residential to residential ratio





Map C5A-b Southern: Residential vs Non-Residential land use (2018)

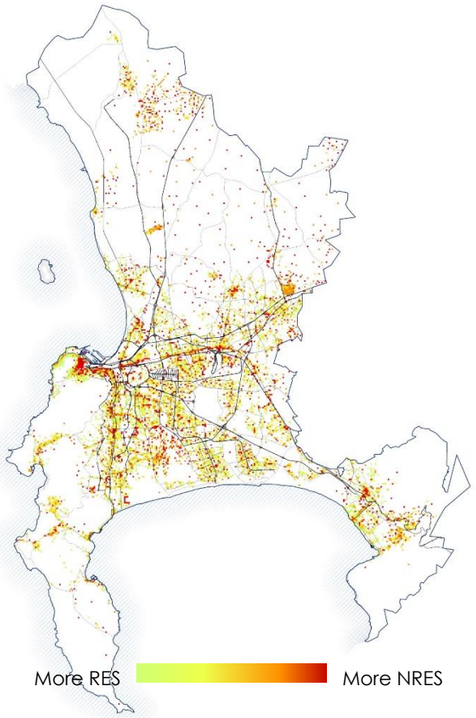
C.
5b

LAND AND BUILDING DEVELOPMENT

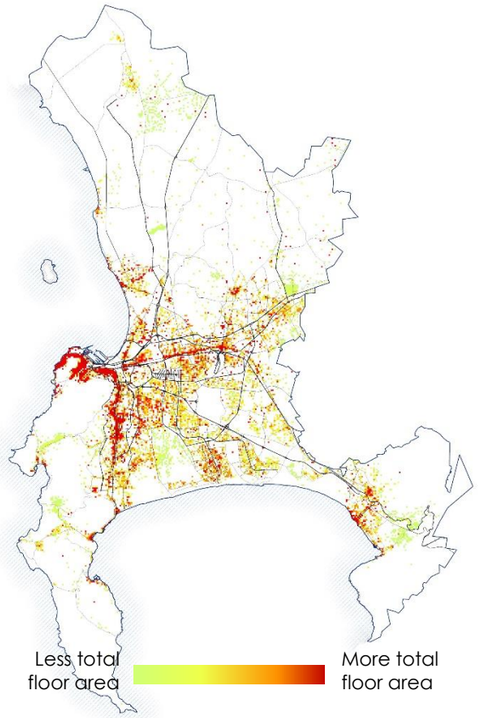
DIVERSITY AND INTENSITY OF USE (METRO-WIDE)

This indicator shows the combined effect of land use diversity and land use intensity using land uses as captured in the City's General Valuation Roll, 2018 (excludes informal activities/land use).
Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

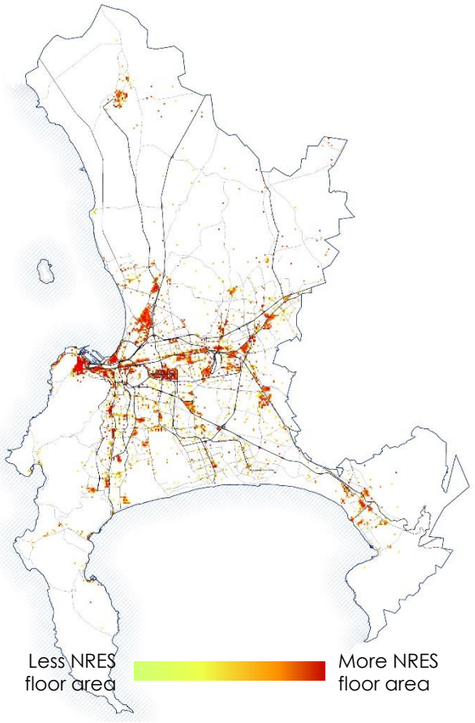
Source: CCT Valuation Roll 2012, 2015 and 2018



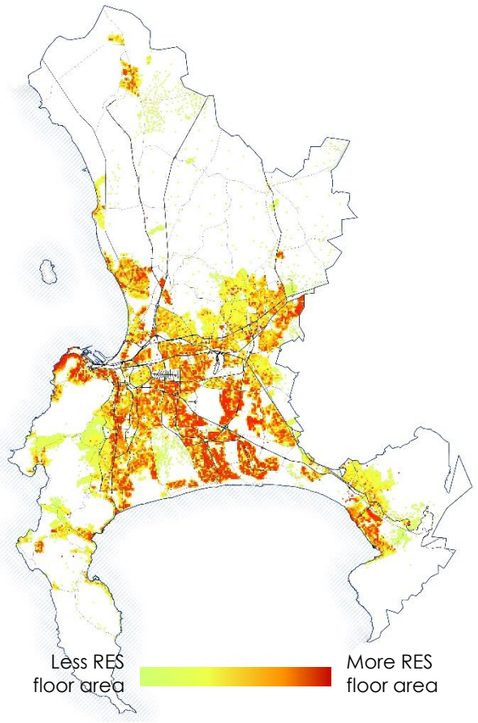
Map C5b-a: Land use diversity (2018)



Map C5b-b: Building density (2018)



Map C5b-c: Non-residential intensity (2018)



Map C5b-d: Residential density (2018)

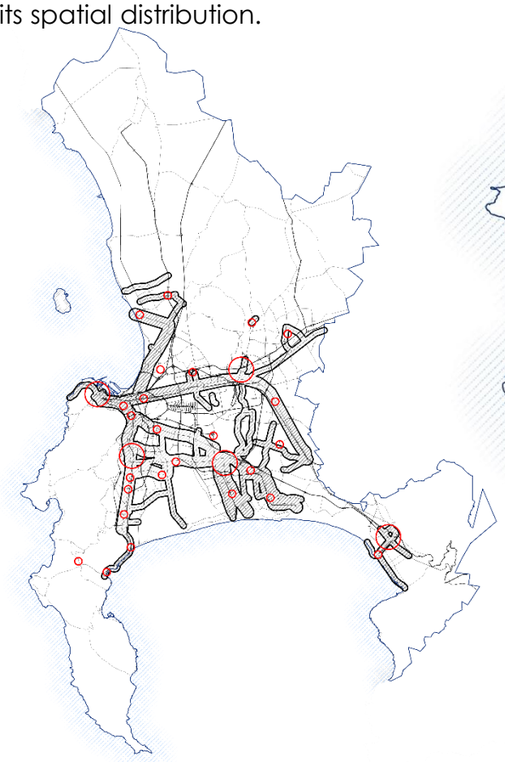
GENERAL ANALYSIS

Maps C5b-a to C5b-d spatially depict land use diversity/mix (ratio of non-residential to residential floor area) and land use intensity (building density/floor factor, i.e. building floor area divided by grid cell area; and non-residential and residential floor area).

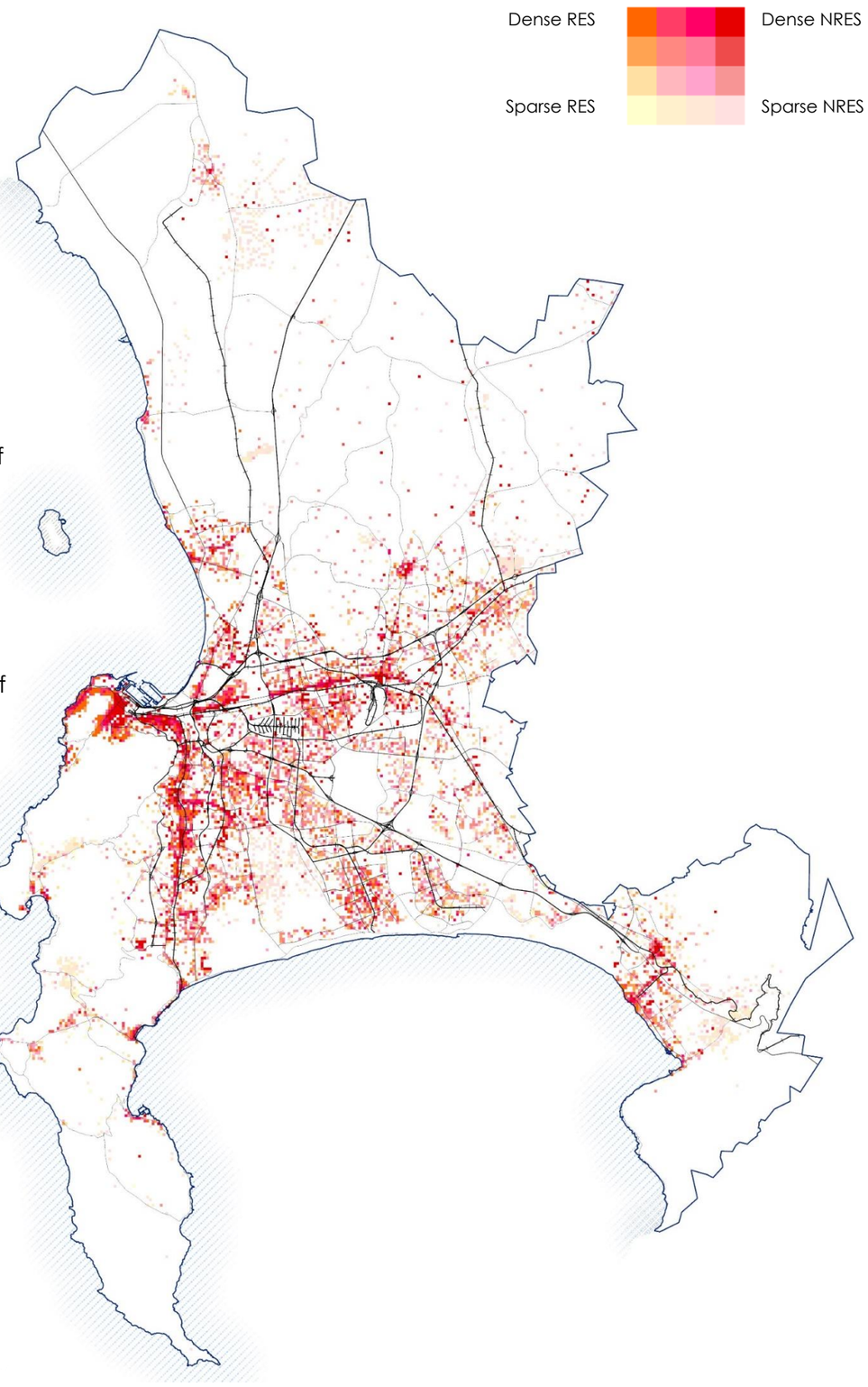
It is evident that strong spatial patterns representing spatial clustering of land use/activities exist.

Map C5b-e depicts development corridors and nodes that contain most of these higher-density, mixed-use areas. These locations are considered to be strategic locations for further intensification and diversification of land use.

Map C5b-f combines land use intensity and diversity into a bivariate depiction of its spatial distribution.



Map C5b-e: Nodes and Corridors (MSDF, 2022)



Map C5b-f: Bivariate analysis of and use diversity and intensity (2018)

C.
5a

LAND AND BUILDING DEVELOPMENT

DIVERSITY OF USE (METRO-WIDE)

This indicator shows the change in land use diversity by comparing the floor area of formal residential (RES) and formal non-residential (NRES) land uses as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

KEY TAKE-AWAY TRENDS:

- It appears that the existing land use diversity is largely being reinforced, which points to a **greater clustering of a diversity of activities in areas where it already occurs**.
- **More diversification occurred around development corridors and in nodes**. Development in the CBD and surrounding inner city areas since 2012 has been predominantly residential uses, in what have historically been areas dominated by non-residential land uses.

Graph C5a-a: **Change in non-residential to residential ratio.**

Map C5a-a: **Change in land use diversity (2012 to 2018).**

Map C5a-b: **Residential vs Non-Residential land use (2018).**

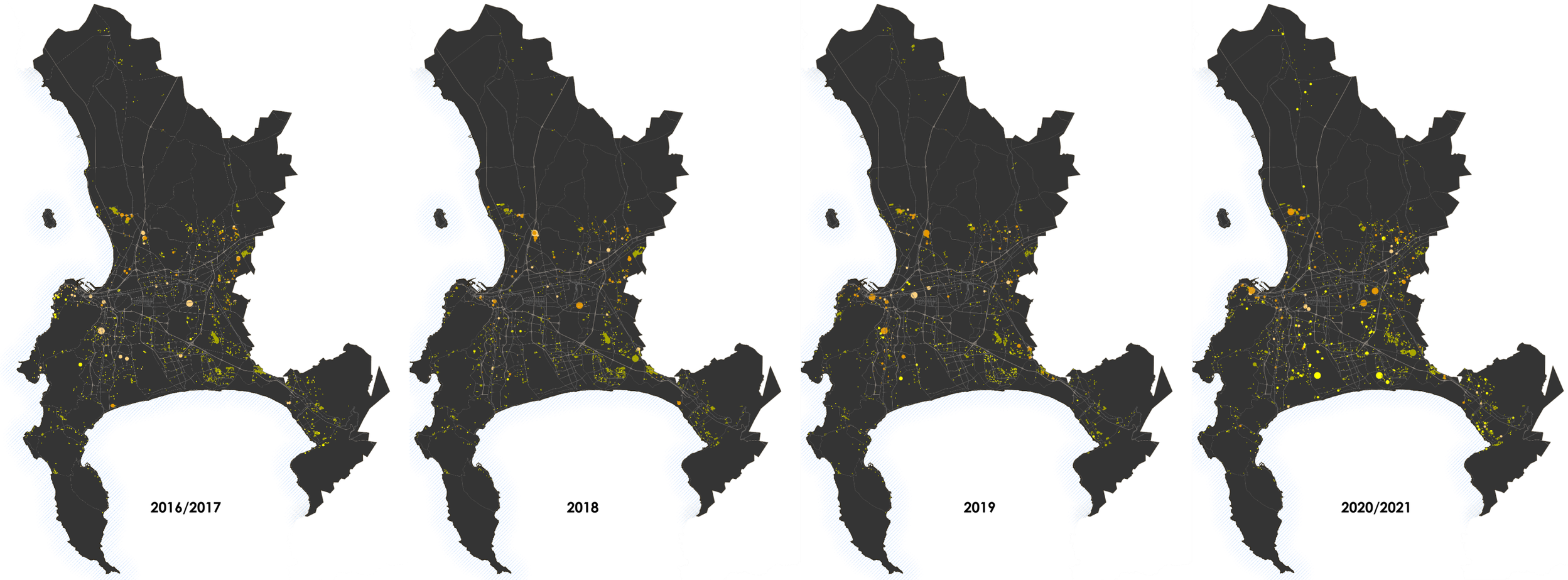
C.
6a

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL BUILDINGS

This indicator shows building plans submitted and building works completed over time. Multi-residential reflects flats and medium-higher density residential units other than single residential.

Source: DAMS building plan applications 2016-2021



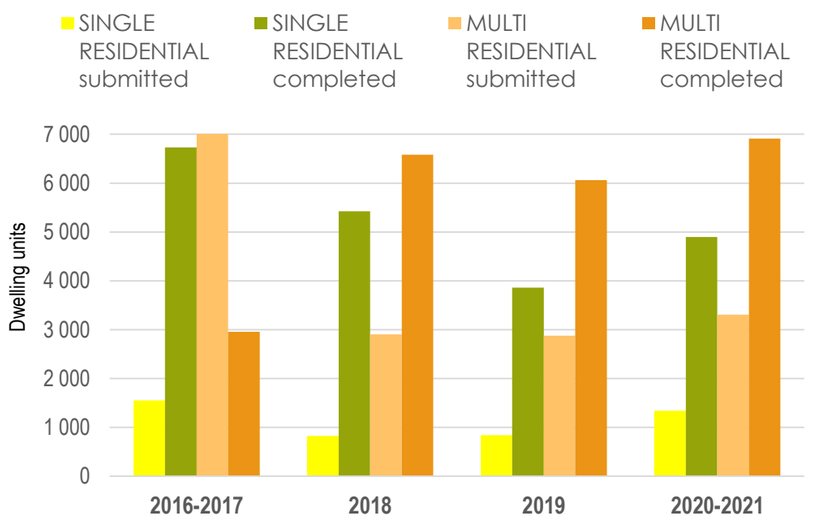
Map series C6a-a: Residential building plans submitted and building work completed per year. The size of circles indicate the relative number of residential units.

GENERAL ANALYSIS

Single residential dwellings (one house on one erf) developed in all areas over the period with specific concentrations in the eastern and northern parts of the City, likely due to the availability of land within the urban development edge for subdivisions and conventional single residential purposes. These areas include the Metro Southeast (MSE), Bloekombos, Blue Downs/Eerste River, Sunningdale, and residential estates such as Sitari (Helderberg). The delivery of state-assisted housing (refer to indicator D1) contributed significantly to the increase in the MSE. These trends align to approved spatial planning policy, which aims to promote densification in highly accessible areas (i.e. nodes and corridors). Low to medium densification tend to occur outside of nodes and corridors.

Multi-residential applications and building completions tend to concentrate in development corridors (mainly the Main Road/Southern Corridor and Voortrekker Road, as well as in new development areas around Sunningdale/Rivergate) and in established nodes within the city such as the CBD, Bellville (including UWC) and Claremont. However, there has been a significant increase in decentralised (northern) areas, such as Sunningdale, Burgundy Estate, Fisantekraal, Brackenfell and Kraaifontein where undeveloped land is available.

New residential buildings completed contribute to the property value as aggregated and reflected as grid cells in indicator C5.



Graph C6a-a: Residential (dwellings): building works completed vs building plans submitted per year (2016 and 2021 partially represented)

C. 6a

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL BUILDINGS

This indicator shows building plans submitted and building works completed over time. Multi-residential reflects flats and medium-higher density residential units other than single residential.

KEY TAKE-AWAY TRENDS:

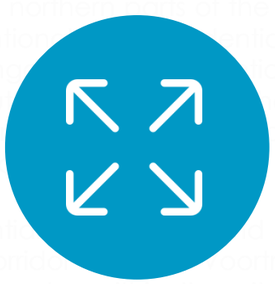


- 20 909 single residential dwellings developed from 2016-2021. Largest concentration in the **eastern and northern parts of the city, likely due to the availability of land**. These areas include the Metro Southeast (MSE), Bloekombos, Blue Downs/Eerste River, Sunningdale, and residential estates such as Sitari (Helderberg). The delivery of state-assisted housing (refer to indicator D1) contributed significantly to the increase in the MSE.



- 22 510 multi-residential units developed from 2016-2021. Applications and building completions tend to **concentrate in development corridors** (mainly the Main Road/Southern Corridor and Voortrekker Road, as well as in new development areas around Sunningdale/Rivergate) **and in established nodes** within the city such as the CBD, Bellville (including UWC) and Claremont.

- On average, there is approximately 7 900 new residential units developed per annum (from 2016-2021) in Cape Town based on categorised building approvals.



- There has been a **significant increase in decentralised (northern) areas**, where undeveloped land is available, such as Sunningdale, Burgundy Estate, Fisantekraal, Brackenfell and Kraaifontein

- New residential buildings completed contribute to the property value as aggregated and reflected as grid cells.

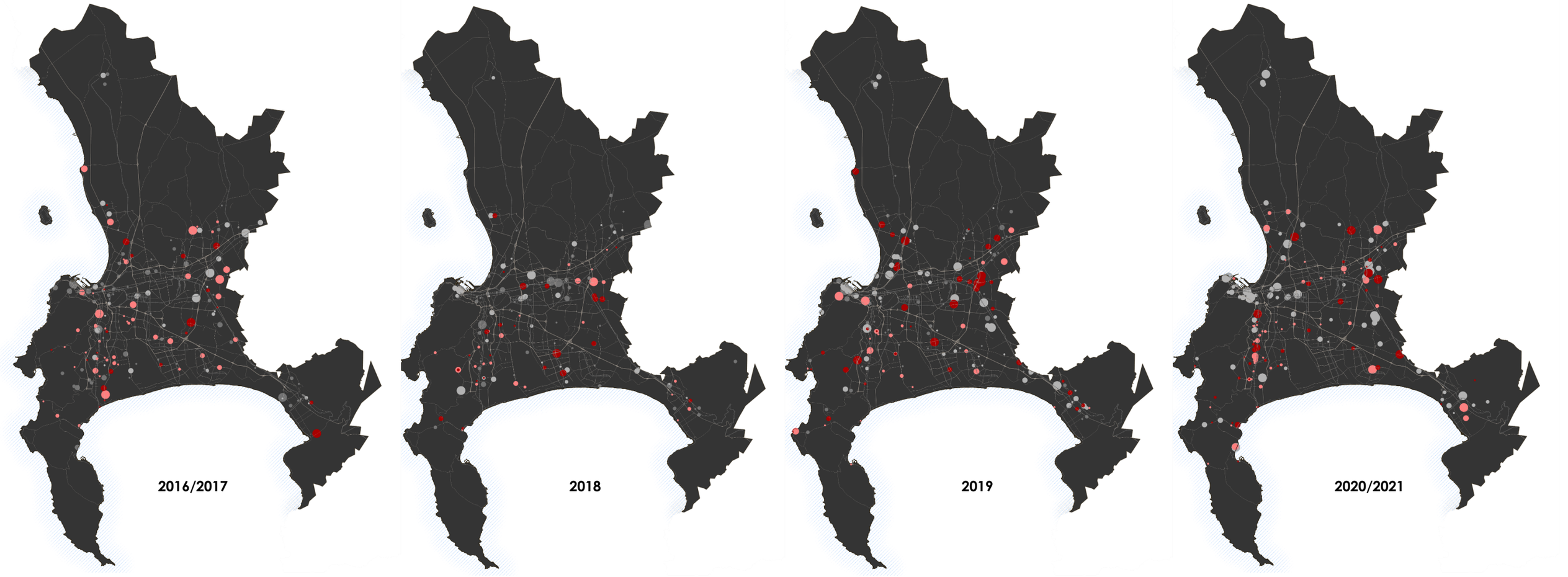
C.
6b

LAND AND BUILDING DEVELOPMENT

NON-RESIDENTIAL BUILDINGS: RETAIL

This indicator shows building plans submitted and building works completed over time.

Source: DAMS building plan applications 2016-2021



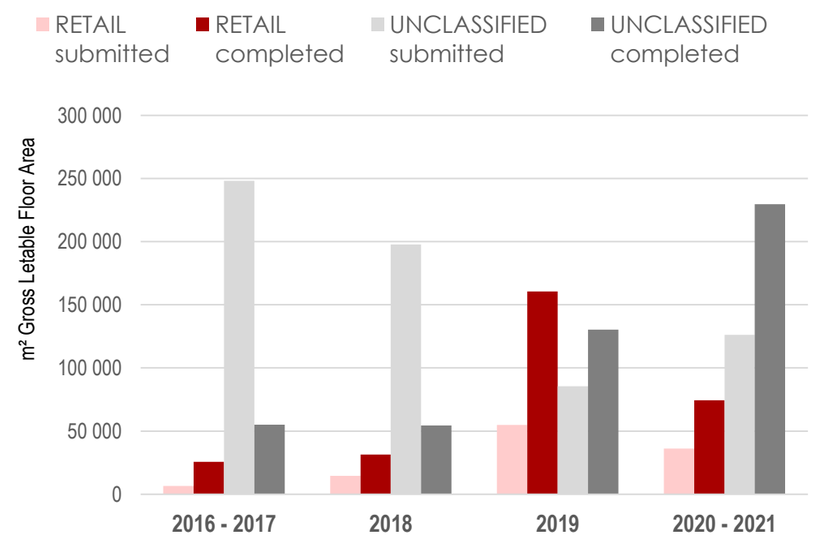
Map Series C6b-a: Building plans for retail buildings submitted and constructed. The size of circles indicate the relative floor area in square metres.

GENERAL ANALYSIS

Overall between 2017 and 2020, building plan submissions and building completions for retail tended to locate within development corridors (mainly southern corridor, Blaauwberg/Koeberg Rd and Voortrekker Road) and in close proximity to high-order transport routes (such as the N1, R300 and N7). It is interesting to note that while there were significant building plan submissions for retail along the Southern Corridor from 2017 to 2019, the vast majority of them have not been completed as of 2021.

Since 2017, there were multiple submissions and completions in Brackenfell and Kuils River (inside and close to the Brackengate business parks). This is followed by quite a few large retail building completions in the urban inner core, in Delft, Philippi East, Mitchells Plain, Belhar and other more predictable locations such as Durbanville, Blaauwberg Road, Gordon's Bay and Constantia/Tokai areas. This increase and trend support the new areas of increased residential development (Kuils River/ Brackenfell), or increased residential concentrations in the metro-Southeast. Submissions in Khayelitsha in 2020/21 will be monitored closely. Fairly large concentrations of unclassified non-residential land uses (in grey) generally located in the CBD, Century City, Maitland/Pinelands/Goodwood, and here and there in stand-alone locations, likely indicating an increase in mixed-use developments, which cannot be solely classified as retail, office or industrial.

Newly completed retail buildings contribute to the property value increases as aggregated and reflected on grid cell basis in indicator C5.



Graph C6b-a: Retail (m²): building works completed vs building plans submitted per year (2016 and 2021 partially represented)

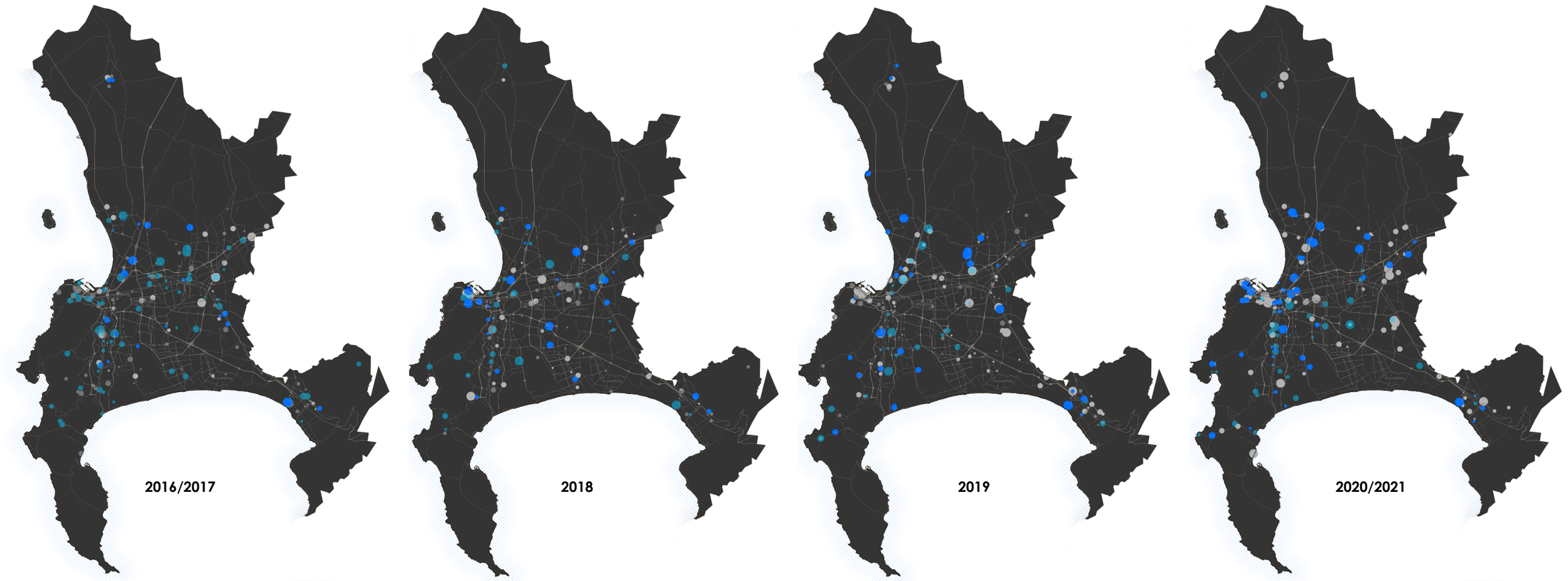
C.
6C

LAND AND BUILDING DEVELOPMENT

NON-RESIDENTIAL BUILDINGS: OFFICE

This indicator shows building plans submitted and building works completed over time.

Source: DAMS building plan applications 2016-2021



Map series C6c-a: Building plans for office buildings submitted and constructed. The size of circles indicate the relative floor area in square metres.

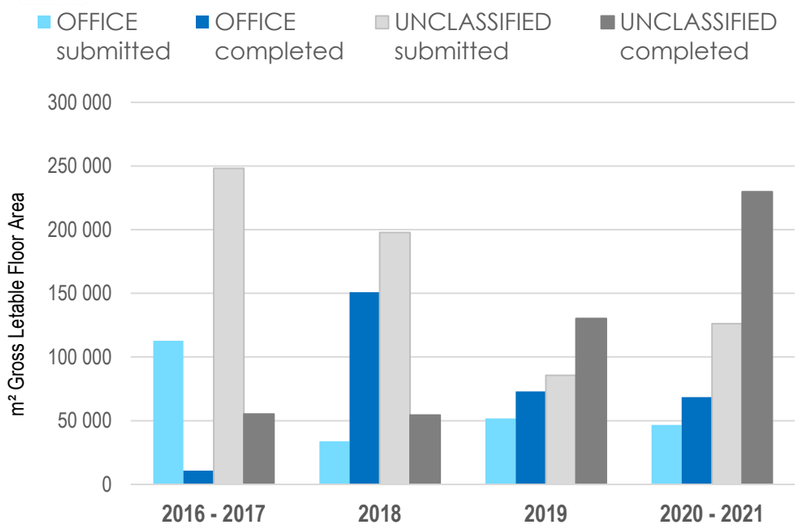
GENERAL ANALYSIS

In terms of building completions, office development is highly concentrated in areas along the Southern Corridor, the Blaauwberg Corridor, the Bellville/Tyger Valley area and along Voortrekker Road. These include established or mature nodes such as the CBD, Century City, Observatory, Newlands, Minerton, TygerValley/ Durbanville, and Brackenfell. Other decentralised areas outside of key corridors include Somerset West.

Emerging office locations include Kensington, Welgemoed, Sunningdale/Sandown, Somerset Mall area and smaller buildings on the peninsula. Completed buildings in 2019 appear significantly less than preceding years, but seems to pick up again after the 2020/21 pandemic. A strong agglomeration is visible along the N7 in a northern direction. Absence of significant office building plan submissions as well as completed buildings, is increasingly visible in the metro Southeast. This marks a deteriorating pattern of availability of office space in areas with some of the highest residential density.

Building plan submissions tend to concentrate in existing corridors and nodes like the CBD, Century City, Tygervalley and Claremont/Wynberg, similar to patterns mentioned above. However, there was a substantial increase in submissions in 2020 in Pinelands, Epping, Parow, Westlake and Sun Valley.

The newly completed office buildings (dark blue on graph C6c-a) contribute to the increase in property values as aggregated and visible as cumulative values in the grid cells used in indicator C5.



Graph C6c-a: Office (m²): building works completed vs building plans submitted per year (2016 and 2021 partially represented)

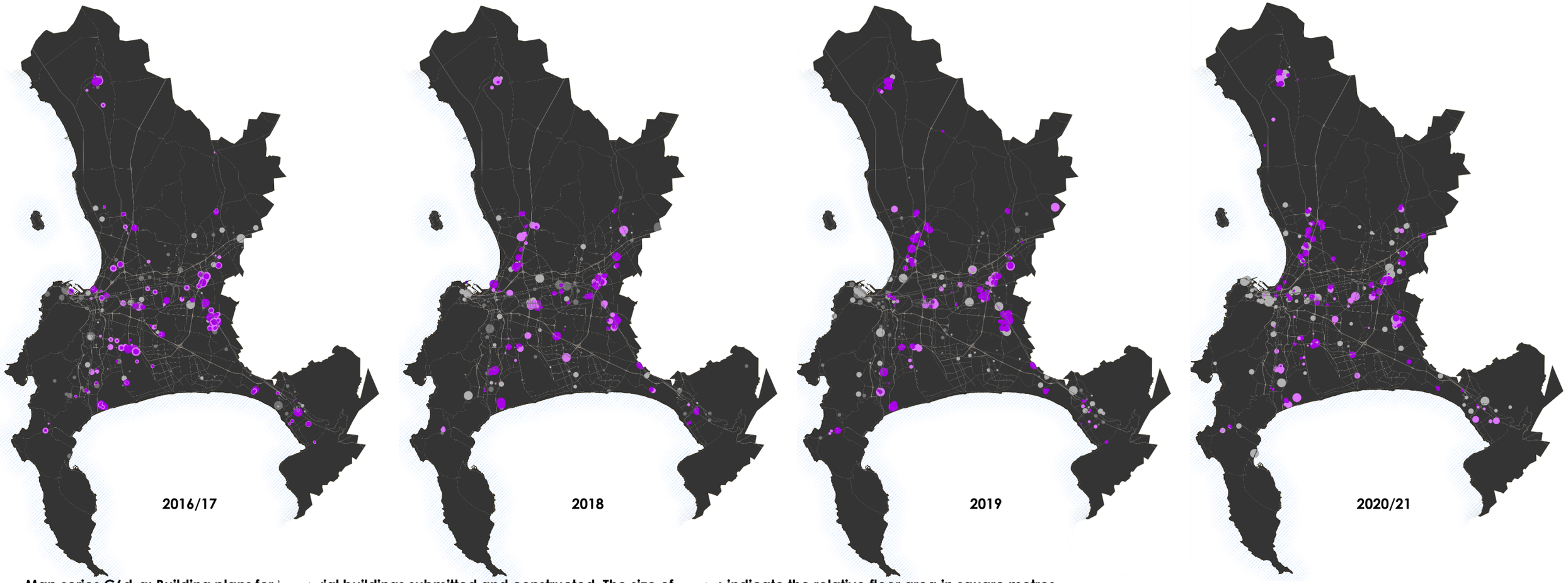
C.
6d

LAND AND BUILDING DEVELOPMENT

NON-RESIDENTIAL BUILDINGS: INDUSTRIAL

This indicator shows building plans submitted and building works completed over time.

Source: DAMS building plan applications 2016-2021



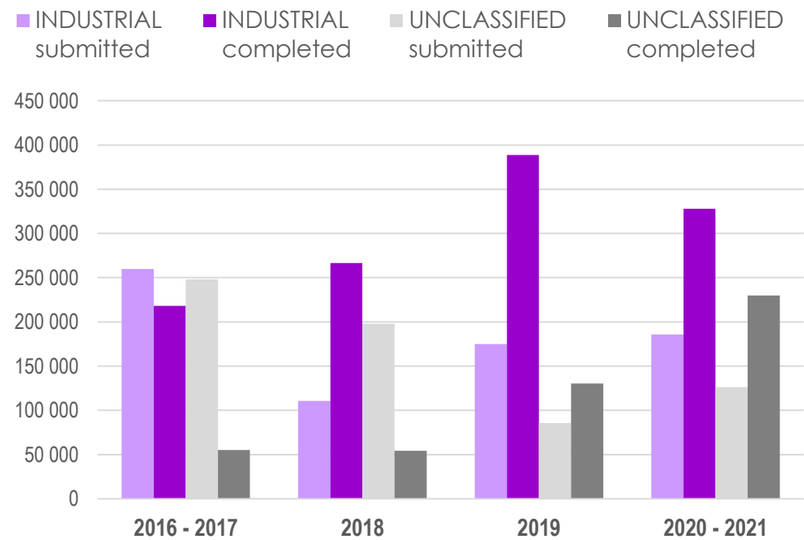
Map series C6d-a: Building plans for industrial buildings submitted and constructed. The size of circles indicate the relative floor area in square metres.

GENERAL ANALYSIS

Between 2017 and 2021, nearly all existing industrial areas expanded significantly in terms of floor area based on building completions, most noticeably Atlantis, Montague Gardens, Killarney, Rivergate, Atlas Gardens, Blackheath, Brackengate, Stikland, Lansdowne, Epping and Capricorn Park. In terms of building plan submissions, areas expected to see an increase in completed construction of industrial buildings are Capricorn Park, Blackheath, Epping, Airport and Parow Industria. This trend is reinforced by areas designated for industrial development in approved spatial planning policy and supported by the City's Investment Incentive Policy, which includes the following six 2018-areas: Atlantis, Parow, Lansdowne, Elsies River, Sacks Circle and Triangle Farm industrial areas.

There are large numbers of building plans in the CBD/Woodstock/Salt River areas submitted but not classified as industrial and would typically indicate mixed non-residential land uses (grey dots).

There does not appear to be any trend of new or emerging industrial areas, other than small pockets of land uses in various locations associated with existing business parks or commercial areas (Watergate Park, Mitchell's Plain CBD, Stonewood and Buhrein Estate). Overall the Metro Southeast has hardly seen any applications for building plans approved or any completed construction of buildings classified to be used for industrial land uses (including manufacturing).
New development contribute to the property value where aggregated spatial units of analysis/levels of aggregation are used, e.g. grid cells used in indicator C5.



Graph C6d-a: Industrial (m²): building works completed vs building plans submitted per year (2016 and 2021 partially represented)

NON-RESIDENTIAL BUILDINGS

This indicator shows building plans submitted and building works completed over time.

KEY TAKE-AWAY TRENDS:

- **Low building plan completions for retail between 2016 and 2018 suggests contraction of this market** due to continued growth and expansion in the e-commerce sector (online shopping, mobile delivery apps, etc.) and less reliance on physical retail space. However in 2019 there was a substantial (unexplained) increase which then declined between 2020 and 2021 likely due to Covid-19.

- **Decline in building plan completions for offices: suggest contraction of the office sector** due to Covid-19 and resultant increase in remote working. With fewer employees at the office on a given day, space requirements are shrinking.

- **Continued expansion of existing industrial areas** based historic building plan submissions and completions. This is influenced by the growth in the online retail market and growing demand for well-located warehousing and distribution centres, which is reflected in the nature of building plan applications in the past several years.

Map Series C7-d: **Building plans for industrial buildings submitted and constructed. The size of circles indicate the relative floor area in square metres.**

GENERAL AN

Between 2 all existing industrial areas have expanded significantly in terms of floor area based on building completion Atlantis, Landsdown apricorn Park. In terms of building plan submissions, areas expected to see an increase in completed co industrial build reinforced by areas designated for industrial development in approved spatial planning policy and supported by the City's Investment Incentive Policy which include Triangle Farm Industrial Areas.

There are large numbers of building plans in the CBD/ Woodstock/ Salt River area submitted but not classified as industrial and would typically indicate mixed non-residential land uses (grey dots).

There does not appear to be any trend of new or emerging industrial areas, other than small pockets of land uses in various locations associated with existing business parks or commercial areas (Watergate Park, Mitchell's Plain CBD, Stonewood and Buhrein Estate). Overall the metro-south east has hardly seen any applications for building plans approved or any completed construction of buildings classified to be used for industrial land uses (including manufacturing).
New development contribute to the property value where aggregated spatial units of analysis / levels of aggregation are used, e.g. grid cells used in indicator C5.



Graph C7-d: **Industrial (m²): building works completed vs building plans submitted per year** (2016 and 2021 partially represented).

C.7a

LAND AND BUILDING DEVELOPMENT

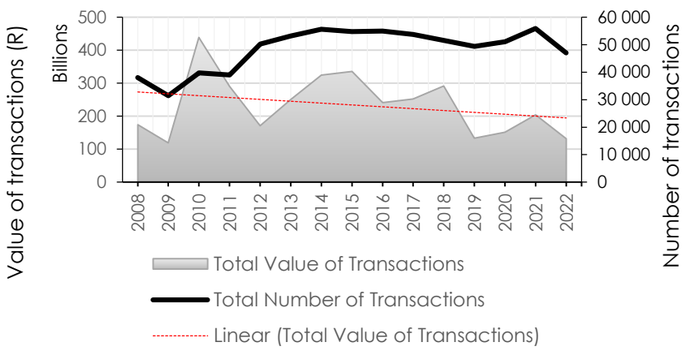
PROPERTY MARKET ACTIVITY: OVERVIEW

This indicator shows the spatial distribution of property transactions received from the Deeds Registry.
Sale prices are adjusted for inflation (base = December 2021).

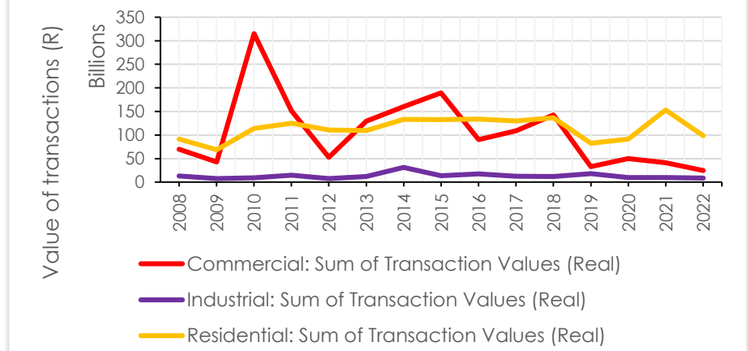
Source: CCT Sales Data 2008-2022

OVERVIEW

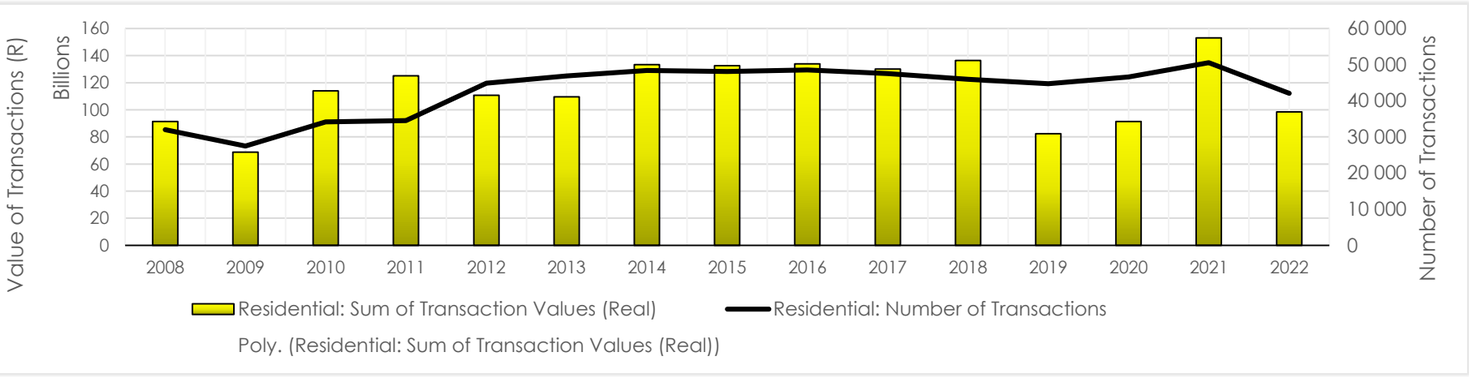
Property transactions (buying/selling of property) represent the price point at which a willing buyer and a wiling seller conclude a sale transaction at a specific point in time, given market conditions at the time. The various metrics that can be derived from the property transaction data indicate the level of activity in the property market in general, and in the various broad subsectors (e.g. residential, commercial, industrial, agriculture, etc.). The spatial analysis (location) of property transactions by property type over different time periods provide insight into location preference, trends (looking back) and potential changes in the characteristics of an area (looking forward).



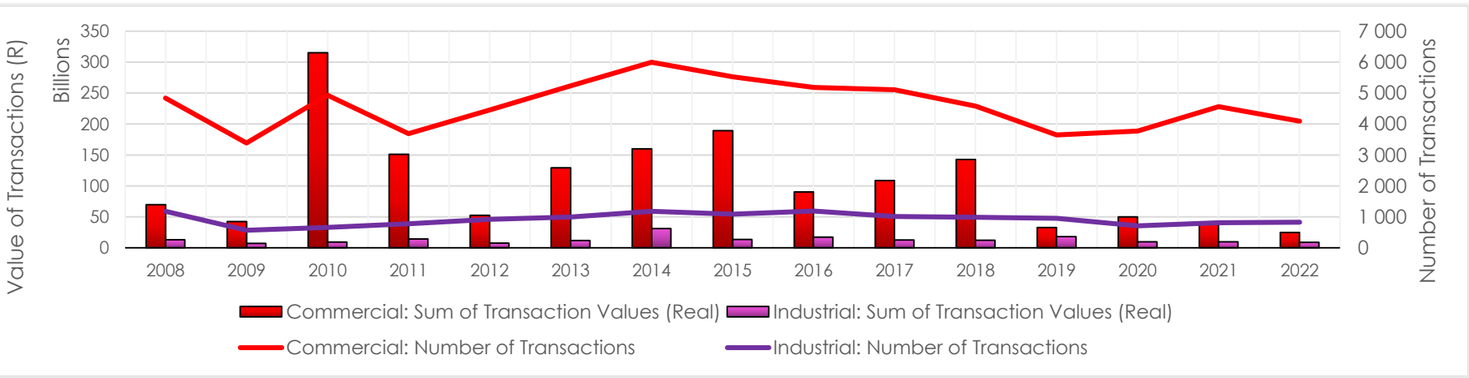
Graph C7a-a: **Total property transaction value and number of qualifying transactions**



Graph C7a-b: **Property transaction value: commercial, industrial and residential**



Graph C7a-c: Residential transaction value and number of transactions



Graph C7a-d: Non-residential (commercial and industrial) transaction value and number of transactions

OVERALL TREND

The total real value of residential, commercial and industrial property transactions has been declining since 2015, while the number of transactions on average remained fairly constant (graph C7a-a). Graph C7a-b which shows the residential, commercial and industrial property sectors separately, shows that the decline can largely be attributed to the decline in the value of transactions in the non-residential property sectors.

GENERAL ANALYSIS

Property transactions in the non-residential market should not be regarded in isolation from other indicators that better reflect its value, i.e. rental returns, vacancy rates, operating expenses and capitalisation rates. A property sale transaction, therefore, represents a snapshot of the cumulative effect of current market conditions, as well as the underlying economic sector at the date of sale. There are many forces at play, which this analysis will not attempt to explore.

As is the case with the non-residential property market, the residential property market activity only reflects activity in the formal market. It tells the story of formal residential property market transactions, but not the complete story of the entire housing market.

Unlike the commercial property market, the number and value of transactions in the residential market appear synchronised (i.e. lower number of transactions result in lower value of transactions). Graph C7a-c shows a significant decline in both metrics in 2019, followed by an increase during 2020 and 2021, and another decrease in 2020 (also see graph C7a-e). These swings can in part be explained by the implications of the Covid-19 lockdown and the corresponding lowering and raising of interest rates.

Residential sales transaction values and volumes directly inform the valuation of property, and patterns of value distribution and change in value (section C.8) therefore mirror these trends to a large extent.

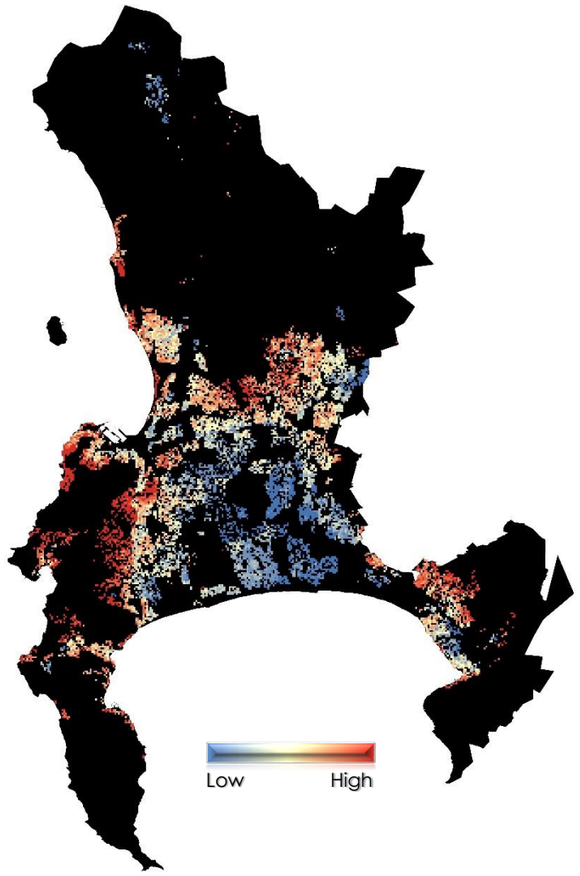
C.7b

LAND AND BUILDING DEVELOPMENT

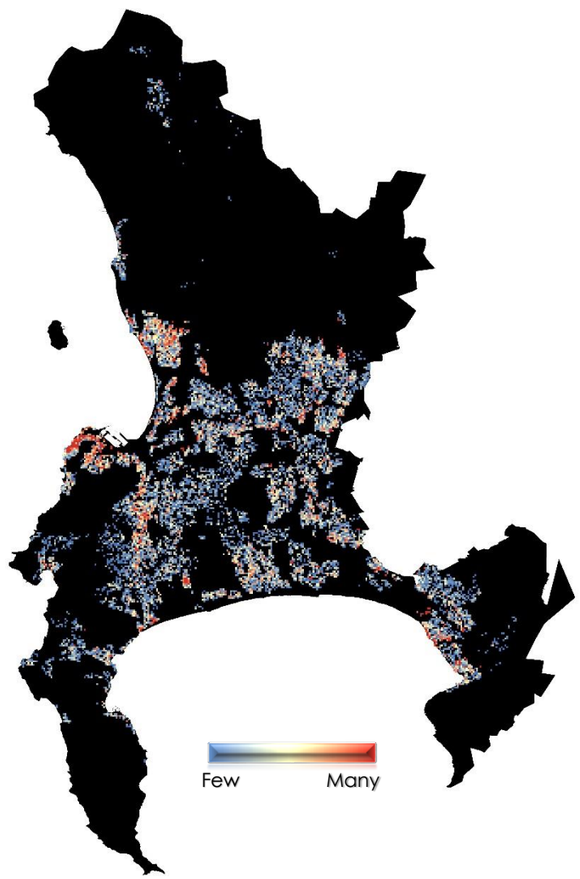
PROPERTY MARKET ACTIVITY: RESIDENTIAL SALES

This indicator shows the spatial distribution of property transactions received from the office of the Registrar of Deeds. Sale prices have been adjusted for inflation and reflect constant December 2021 prices.
Data is aggregated to 4 ha (200 m x 200 m) square grid cells. Residential transactions are also aggregated to suburbs.

Source: CCT Sales Data 2008-2022



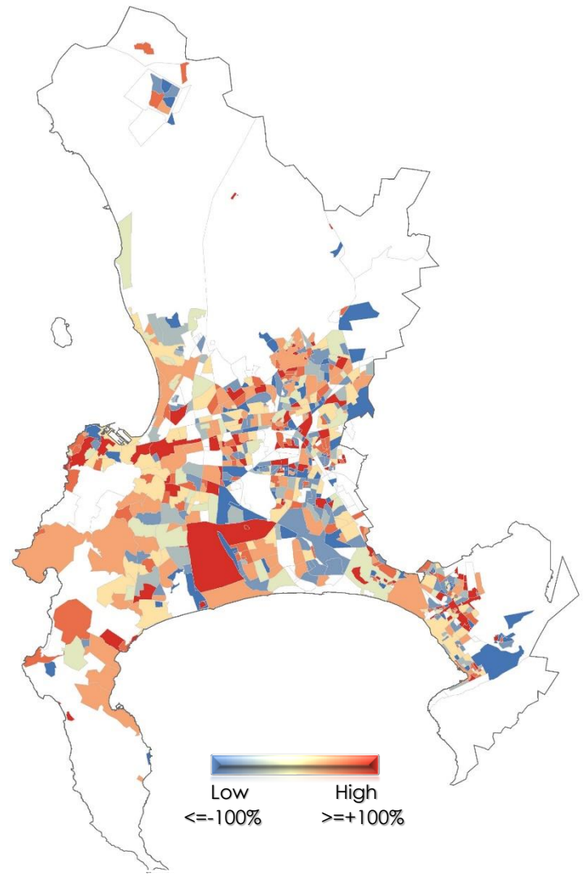
Map C7b-a: Median sales price by 4ha grid cell, 2022



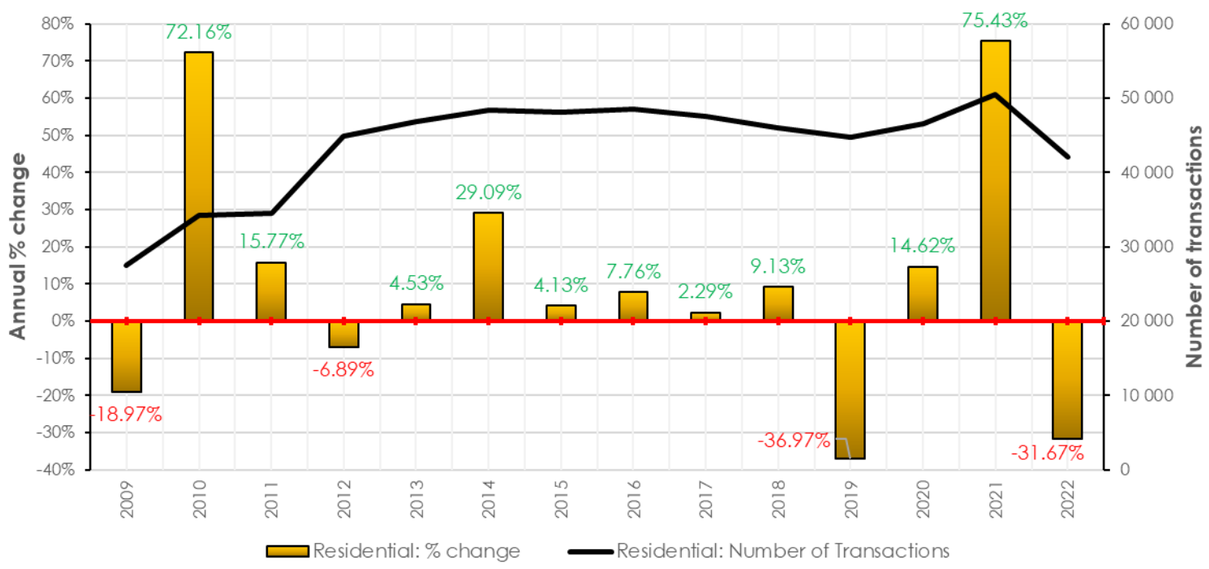
Map C7b-b: Number of transactions, 2022



Map C7b-c: Sum of transaction values, 2022



Map C7b-d: Year-on-year change in total residential transaction value by suburb, 2021



Graph C7b-a: Year-on-year change in total residential property transaction value (constant Dec 2021 prices)

OVERALL TREND

The average number of transactions per annum varied between 40 000 and 50 000 since 2012. Change in the value of transactions was fairly constant between 2011 and 2018, while 2019 and 2022 saw big reductions in the value of transactions that is not fully explained by the lower number of transactions. The trends observed in graph C7b-a are a reflection of drivers affecting residential property, e.g. the Soccer World Cup (2010), Covid-19 (2019), and interest rate adjustments (2019-2022).

Transactions by price range and residential property type (e.g. freehold vs sectional title) can provide nuanced insights and reveal further trends that remain hidden at this level of analysis.

SPATIAL TREND (DISTRIBUTION/PATTERN)

Map C7b-a shows the distribution and concentration of higher and lower median sale prices by 4 ha grid cell and by suburb respectively. The combination of the higher number of transactions (map C7b-b) in higher value areas (map C7b-a) leads to higher total transaction values in more expensive areas (map C7b-c).
Map C7b-d shows year-on-year change in residential transaction values and offer a way to identify the areas that contributed to the higher transaction values in 2021.

C.7b

LAND AND BUILDING DEVELOPMENT

PROPERTY MARKET ACTIVITY: RESIDENTIAL SALES

This indicator shows the spatial distribution of property transactions received from the office of the Registrar of Deeds. Sale prices have been adjusted for inflation and reflect constant December 2021 prices.
Data is aggregated to 4-hectare (200m x 200m) square grid cells. Residential transactions are also aggregated to suburbs.

KEY TAKE-AWAY TRENDS:

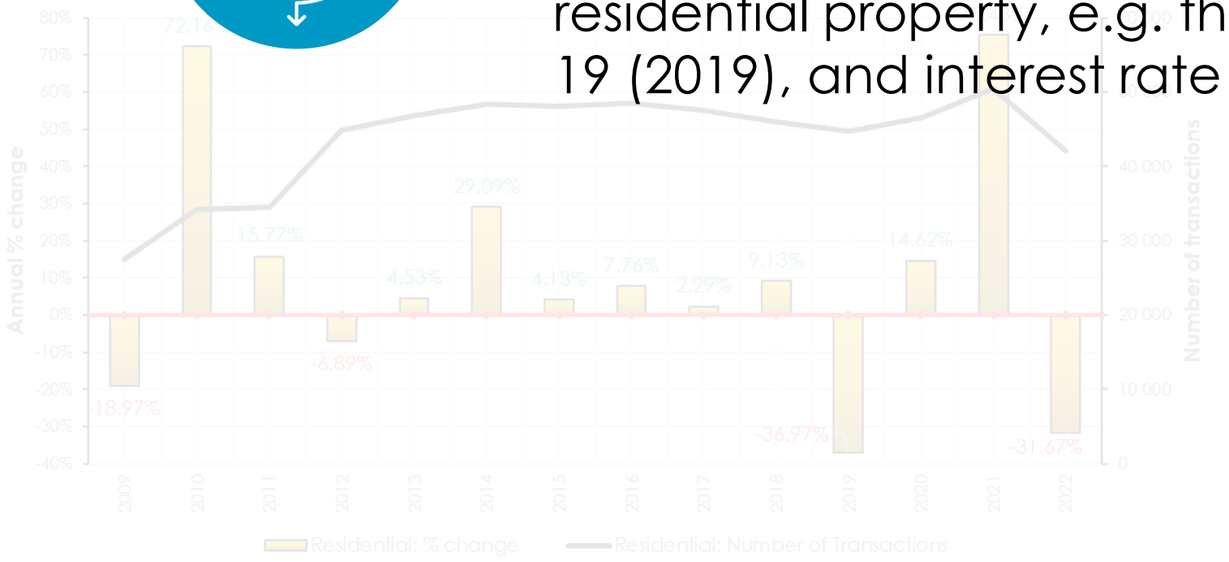
- The average number of transactions per annum varied between 40 000 and 50 000 since 2012. Change in the value of transactions was fairly constant between 2011 and 2018, while **2019 and 2022 saw big reductions in the value of transactions** that is not fully explained by the lower number of transactions.
- The trends observed are a reflection of drivers affecting residential property, e.g. the Soccer World Cup (2010), Covid-19 (2019), and interest rate adjustments (2019-2022).

Map C7-a: **Me** **grid cell, 2022**

Map C7-b: **Number of transactions, 2022**

Map C7-c: **Sum of transaction values, 2022**

Map C7-d: **Year-on-year change in total residential transaction value by suburb, 2021**



Graph C7-e: **Year-on-year change in total residential property transaction value** (constant Dec 2021 prices)

OVERALL TRENDS

The average number of transactions per annum varied between 40 000 and 50 000 since 2012. Change in the value of transactions was fairly constant between 2011 and 2018, while 2019 and 2022 saw big reductions in the value of transactions that is not fully explained by the lower number of transactions. The trends observed in Graph C7-e is a reflection of drivers affecting residential property, e.g. the Soccer World Cup (2010), Covid-19 (2019), and interest rate adjustments (2019-2022).

Transactions by price range and residential property type (e.g. freehold vs sectional title) can provide nuanced insights and reveal further trends that remain hidden at this level of analysis.

SPATIAL TREND (DISTRIBUTION/PATTERN)

Map C7-a shows the distribution and concentration of higher and lower median sale prices by 4ha grid cell and by suburb respectively. The combination of the higher number of transactions (map C7-b) in higher value areas (map C7-a) leads to higher total transaction values in more expensive areas (map C7-c).
Map C7-d shows year-on-year change in residential transaction values and offer a way to identify the areas that contributed to the higher transaction values in 2021.

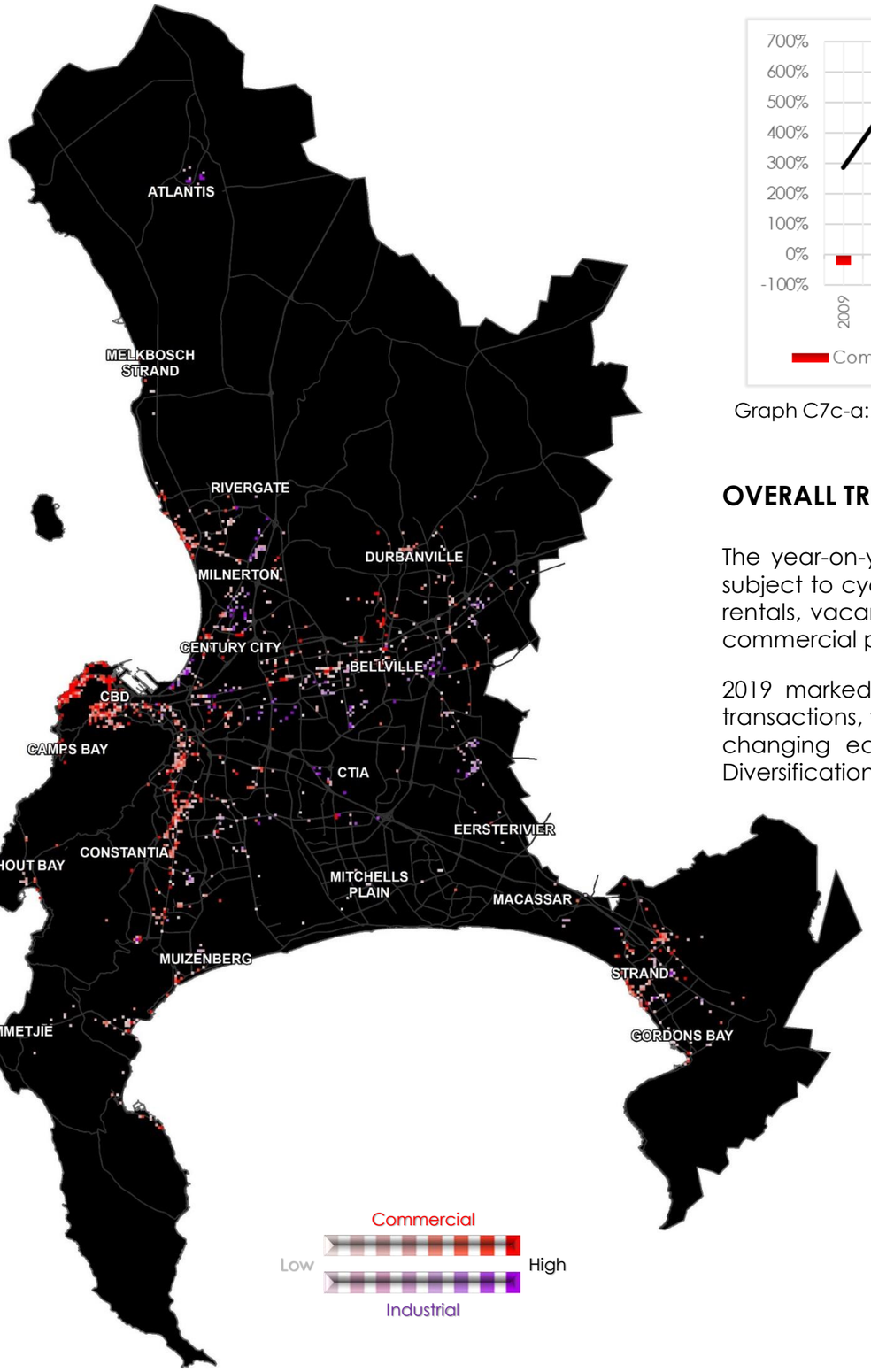
C.7
C

LAND AND BUILDING DEVELOPMENT

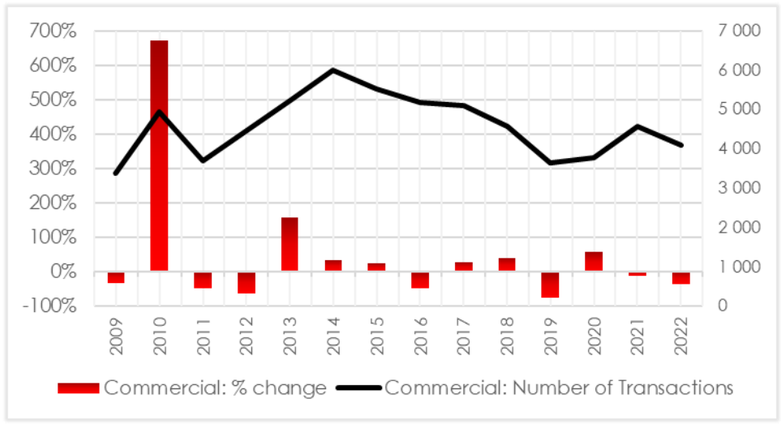
PROPERTY MARKET ACTIVITY: NON-RESIDENTIAL SALES

This indicator shows the spatial distribution of property transactions received from the office of the Registrar of Deeds. Sale prices have been adjusted for inflation and reflect constant December 2021 prices.
Data is aggregated to 4 ha (200 m x 200 m) square grid cells.

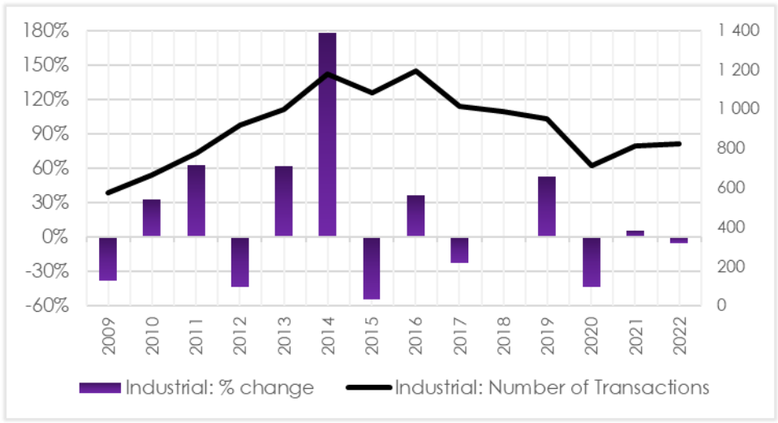
Source: CCT Sales Data 2008-2022



Map C7c-a: **Commercial and industrial property transaction values, 2022**



Graph C7c-a: **Year-on-year change in commercial property transaction value**



Graph C7c-b: **Year-on-year change in industrial property transaction value**

OVERALL TREND

The year-on-year change in transaction value of commercial (office and retail) and industrial property sales transactions is subject to cyclical fluctuations relating to underlying factors such as supply and demand for retail, office and industrial space, rentals, vacancy rates, interest rates and inflation rates, employment, political stability, significant events, etc. In recent times, commercial property also has to contend with emerging trends (e.g. work from home) driven by the aforementioned factors.

2019 marked a noticeable year-on-year reduction in both the value and number of commercial and industrial property transactions, which the sectors still have not recovered from. In riskier times, investors favour established areas. Responses to the changing economic environment vary from growing, consolidating, rationalising, and/or diversifying property portfolios. Diversification is also achieved by converting space for other purposes (e.g. office to residential).

It is interesting to note that for every transaction, the seller elected to sell and the buyer elected to buy. This seems obvious, but it points to the different approaches and views in the non-residential property market.

SPATIAL TREND (DISTRIBUTION/PATTERN)

Map C7c-a depicts the location of commercial and industrial property transactions (value of transactions). It displays a clustering tendency in established business precincts with different locations for commercial and industrial sectors, but also for the underlying subsectors (e.g. office and retail in respect of commercial properties). The significance of development corridors (Voortrekker Road and the southern corridor) and key employment nodes (CBD, Century City, Bellville, Epping, Somerset West CBD, Blue Downs and CTIA) cannot be denied.

Commercial property transactions dominate in the faithful CBD and surrounds, along the southern corridor, and in other established business precincts. Industrial property transactions in 2022 also preferred traditional locations. The Atlantis Industrial area also saw a fair amount of activity, possibly due to its designation as a special economic zone.

Market activity is an important indicator of the performance of commercial and industrial precincts. This analysis, however, does not aim to examine these areas in further detail or compare them or draw conclusions about its potential.

C.7
C

LAND AND BUILDING DEVELOPMENT

PROPERTY MARKET ACTIVITY: NON-RESIDENTIAL SALES

This indicator shows the spatial distribution of property transactions received from the office of the Registrar of Deeds. Sale prices have been adjusted for inflation and reflect constant December 2021 prices.

Data is aggregated to 4 hectare (200m x 200m) square grid cells.

KEY TAKE-AWAY TRENDS:

- **2019** marked a noticeable **year-on-year reduction in both the value and number of commercial and industrial property** transactions, which the sectors still have not recovered from. In riskier times, investors favour established areas.
- Commercial property transactions dominate in the **CBD and surrounds, along the southern corridor, and in other established business precincts**.
- Industrial property transactions **in 2022** also preferred traditional locations. **The Atlantis Industrial area also saw a fair amount of activity**, possibly due to its designation as a special economic zone.



Map C7-e: **Commercial and industrial property transaction values, 2022**

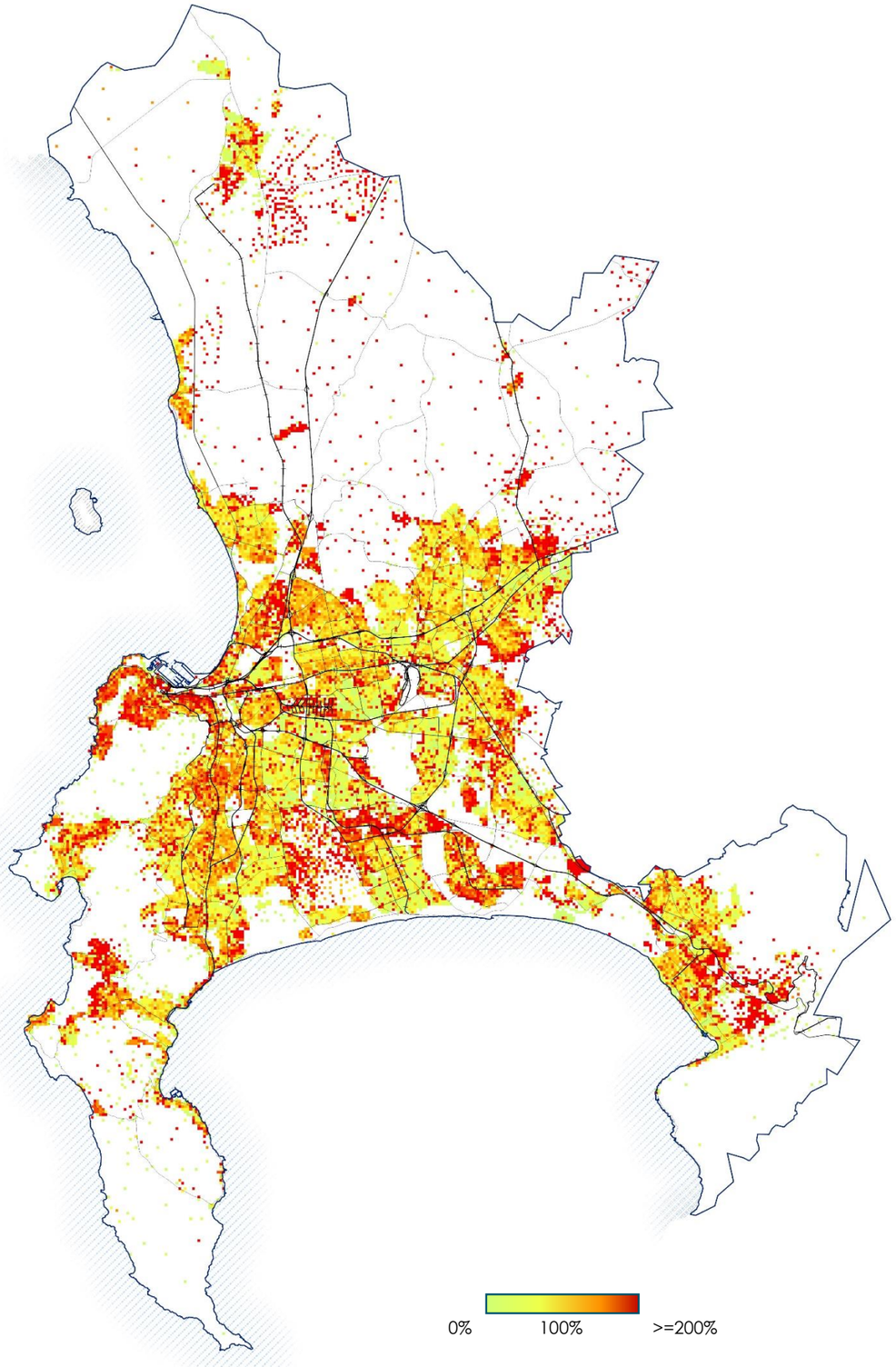
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (METRO-WIDE)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C8-a: **Change in property value (2012 to 2018)**

OVERALL TREND

The value of both residential and non-residential properties has increased between individual GV years (2012, 2015, 2018) and, therefore, also overall between 2012 to 2018 (see graph C8-a).

SPATIAL TREND (DISTRIBUTION/PATTERN)

Visualising the percentage property value change reveals that different areas of the city experienced different levels of change.

This can be ascribed to spatially differentiated demand for and supply of space for different purposes, as well as new development in certain areas, which result in more properties/space, and, as a result, also higher values in those specific 4 ha spatial units as shown on map C8-a.

Hedonic pricing and other factors, e.g. higher values along the coast, newer areas and other desirable locations (e.g. Table Mountain) also have an effect.

This metropolitan scale of analysis, however does not reveal details about the change in value of different land use types and market segments or the real price growth in different areas of the city. Read together with other indicators presented herein.

The following areas exhibited the highest increase in property value (>100 %) between the three valuation terms (2012-2018):

- CBD and surrounds
- Century City
- Claremont, Kenilworth and Wynberg
- Kraaifontein
- Noordhoek
- Metro South East
- Somerset West CBD and surrounds

The majority of these areas directly correlate with the increase in residential density and non-residential development depicted and described in indicators C1, C2 and C3.

GENERAL ANALYSIS

Map a shows the combined value of all formal property types captured on the electronic version of the General Valuation Roll.

This metropolitan scale of analysis, however does not reveal details about the change in value of different land use types and market segments or the real price growth in different areas of the city. Read together with other indicators presented herein.

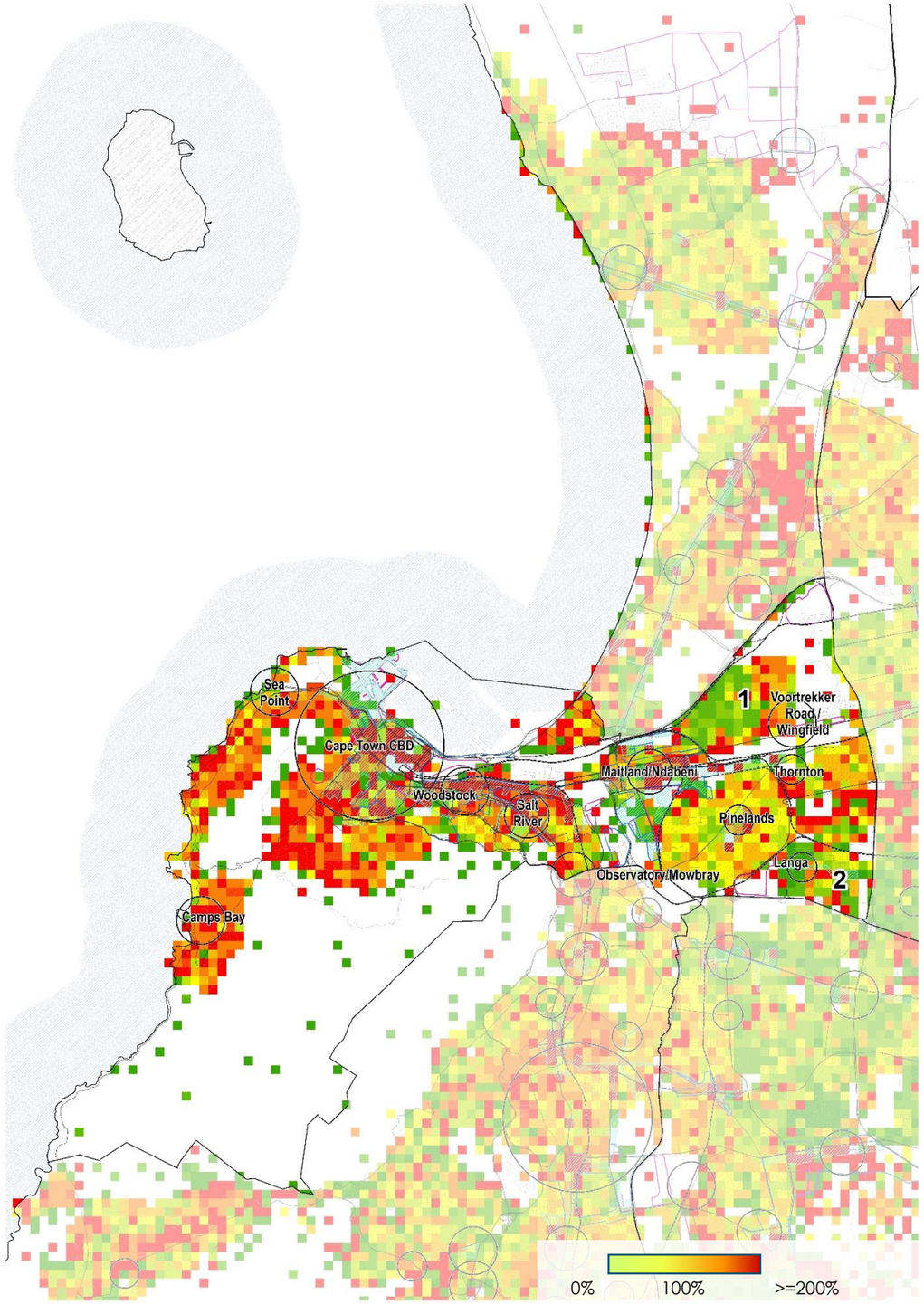
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C8-a Table bay: Change in property value (2012 to 2018).

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)

LOCAL LEVEL TRENDS & ALIGNMENT TO SPATIAL POLICY

Property values have increased the most in the city in the CBD and surrounds going into Woodstock (note: property value change shows alignment to areas designated as mixed-use intensification areas/DFAs/NDAs).

Redevelopment and property improvements have driven some of the value change in the Woodstock and Salt River areas in particular.

Spatially targeted mechanisms and tax incentives have also encouraged commercial and residential development in the inner city (e.g. National Treasury's urban development zone).

The increase in property value is not only due to policy or changes in density, but due to the location qualities of the CBD and Atlantic seaboard with access to employment, sea and mountain views, heritage landscapes and access to destination places such as the Promenade, Table Mountain and V&A.

Development density is happening where higher prices can be achieved for property.

Airbnb's follow the trends of hotels and formal hospitality developments, increasing the number of rooms available and generally tracking similar occupancy trends. There has been an increase in hotel rooms in the CBD/ Waterfront area from roughly 4 600 in 2012 to just over 7 300 in 2018. Hotel Sky added an additional 535 rooms in the interim.

The district remains an area of interest for development and has increased in value with the exclusion of properties within the national park boundaries.

Some affordability remains in Kensington and Maitland.

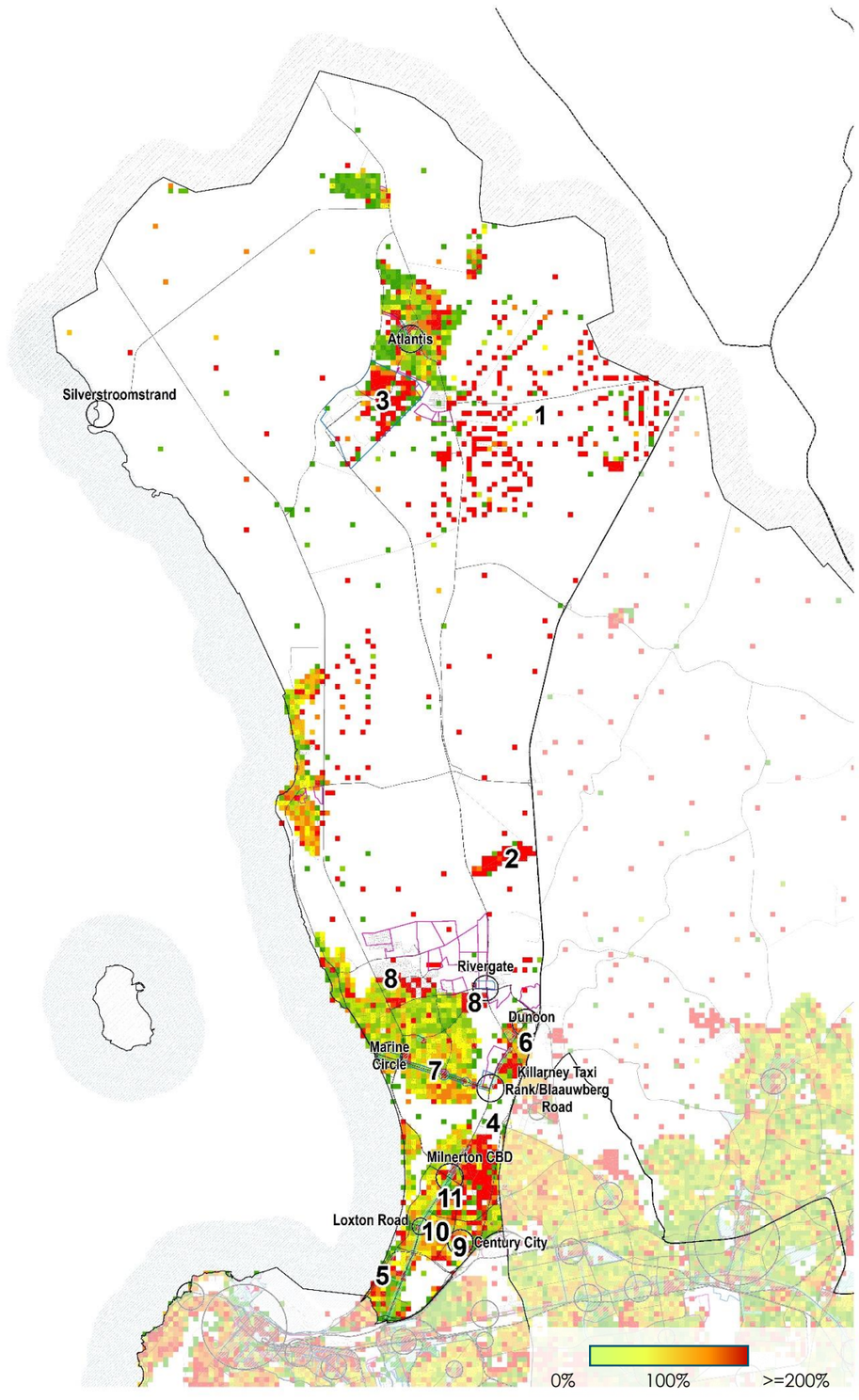
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C9-a Blaauwberg: Change in property value (2012 to 2018)

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

LOCAL LEVEL TRENDS

1. Smallholding areas of Klein Dassenberg and Morningstar (2) have seen a large increase in values.
2. Morningstar
3. Atlantis Industrial area has seen increase in property values, all industrial; this may be due to ASEZ interventions making the industrial area more attractive.
4. Strong increase in value in the industrial corridor (Montague Gardens and Killarney Gardens)
5. Also, an increase in property value is evident in the Paarden Eiland industrial area.
6. Dunoon property values have grown similarly to Flamingo Vlei, representing some of the strongest growth in the district.
7. Change in property values directly along Blaauwberg road have been less than the suburbs surrounding it, except for the shopping centres at Bayside, Table View Mall, Booi de Goede and Flamingo Square.
8. Peripheral development has seen large increases starting from a low base, given the area was undeveloped in 2012 (low base).
9. Strong growth in Century City, driven by mixed land uses of office, retail and residential.
10. Strong growth was evident in Sanddrift, adjacent to Century City. Residential area close to Century City appears to have benefitted from proximity.

ALIGNMENT TO SPATIAL POLICY

Change in property values correlates to industrial areas, rural areas and incremental residential areas such as Du Noon and Joe Slovo Park (11). It does not appear to be driven by spatial planning informants of nodes, corridors and MUI.

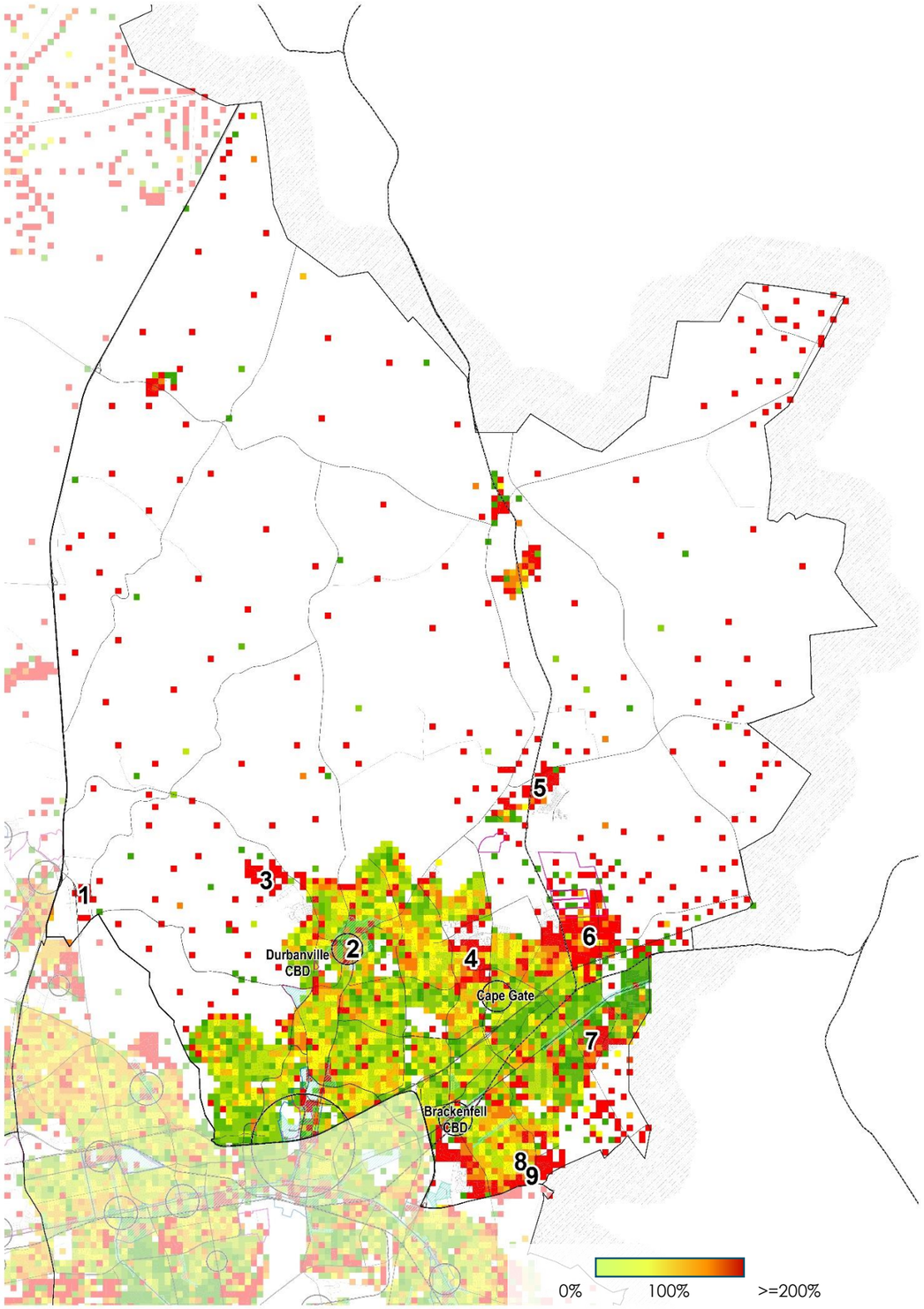
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C8-a Northern: Change in property value (2012 to 2018)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)

LOCAL LEVEL TRENDS

Change in property values (increase) may be primarily ascribed to redevelopments (upgrades) in areas such as Atlas Park (industrial) and Joostenbergvlakte smallholding area, due to temporary departures being approved. Other areas where an increase in valuation is evident, may be ascribed to 'implementation' of development rights on remaining vacant portions of development areas (phasing), or change in land use, which is in line with District Plan proposals.

1. Atlas Park industrial area: Increase in value based on redevelopment and new development (southern polygon) as part of Atlantic Hills.
2. Durbanville secondary CBD: Increase in values in view of redevelopment to higher-density residential and commercial as prescribed in 2012 and 2023 DP sub-district development guidelines.
3. Clara-Anna Fontein security estate: Approvals prior to 2012 DP formulation. This is a new development for low density residential, including a private school.
4. Pinehurst, Kraaifontein: Implementation of medium-density open-market residential and related developments on remaining vacant portions (in accordance with phasing plan: Garden Cities).
5. Fisantekraal, Greenville: Implementation of subsidised human settlement development by Garden Cities.
6. Joostenbergvlakte smallholdings: Change in value ascribed to land use departures approved, which, for properties to the north, may include consent uses under the agricultural zoning.
7. Scottsdene: Increase in values due to implementation of subsidised and social housing development by Calgro. Was an NDA in 2012 District Plan.
8. Brackengate 2 Industrial Area: Implementation of large scale distribution centres.
9. Brackenfell: Infill development & redevelopment (mostly GR1) of former smallholdings along Kruis Road.

ALIGNMENT TO SPATIAL POLICY

The changes in valuation cannot be directly ascribed to approved spatial policy. Increase in valuation mainly occurred due to redevelopments, infill developments (phasing in development areas) and formalisation (top structures) in lower-income areas guided by approved spatial planning policy. However, the increase in land use diversity and intensification in the Durbanville CBD as a nodal area may be linked to the spatial planning category in the DSDF.

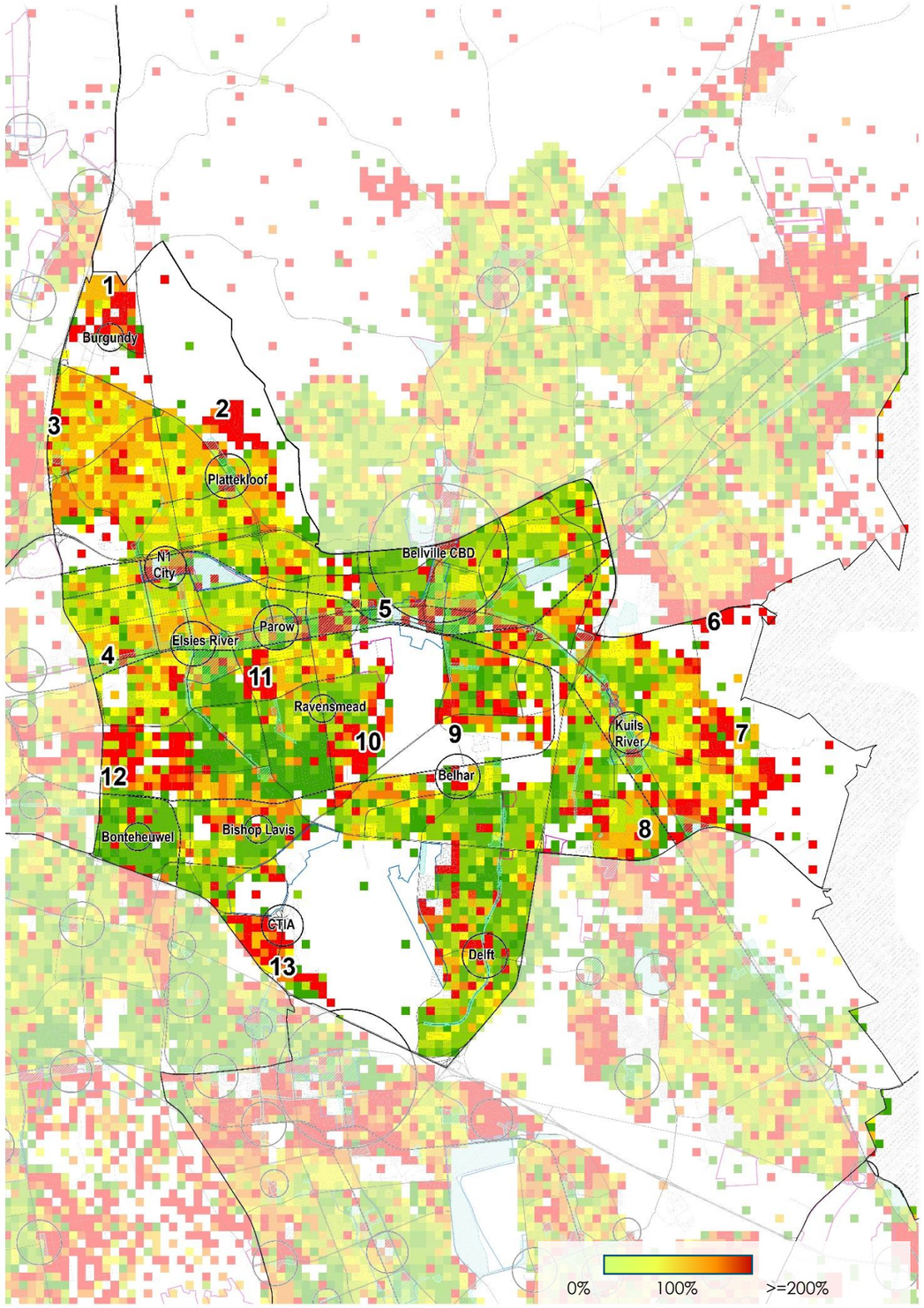
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C8-a Tygerberg: Change in property value (2012 to 2018)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)

ALIGNMENT TO SPATIAL POLICY

The change in property values between 2012 and 2018 correlates with an increase in residential densities, specifically in areas where redevelopment occurred along high-accessibility routes as well as large-scale, open market residential developments being implemented. Furthermore, it is noted that the highest change in property values occurred in the employment opportunities areas designated for industrial use.

LOCAL LEVEL TRENDS

The section below highlights the areas where a significant change in property values was observed.

1. Substantial increase in property value resulting from various portions of the Burgundy Estate, mostly general residential development, being implemented.
2. Substantial increase in property value resulting from implementation of open market (SR1) Baronetcy Estate as well as the De Plattekloof Lifestyle retirement village.
3. Increase in valuation could be a result of upgrades as these are established single-residential suburbs.
4. Increase in property values within the Voortrekker Road corridor (VRC) to the north up to Milton Road. This could be as a result of redevelopment of existing properties to higher-density residential and correlates with the land use diversity indicator (see C5).
5. Increase in property values within the Voortrekker Road corridor (VRC) closer to the spine between the Parow and Bellville areas. This could be as a result of redevelopment of existing properties to include a wide variety of land uses (mixed use increase) and correlates with the land use diversity indicator (see C5).
6. Implementation of higher-density residential and commercial development along Bottelary and Saxdowne roads.
7. Infill development of remaining phases in the Zevenwacht area, including commercial (retail) and residential development.
8. Stellendale infill development (general residential) implementation. NDA targeted for medium to high residential densities in District Plan.

9 – 13 Increase in property values in industrial areas namely Sacks Circle, Parow Industria, Beaconvale, Epping 2 and King Air Industria. It is assumed that this is mostly due to redevelopment in these established industrial areas.

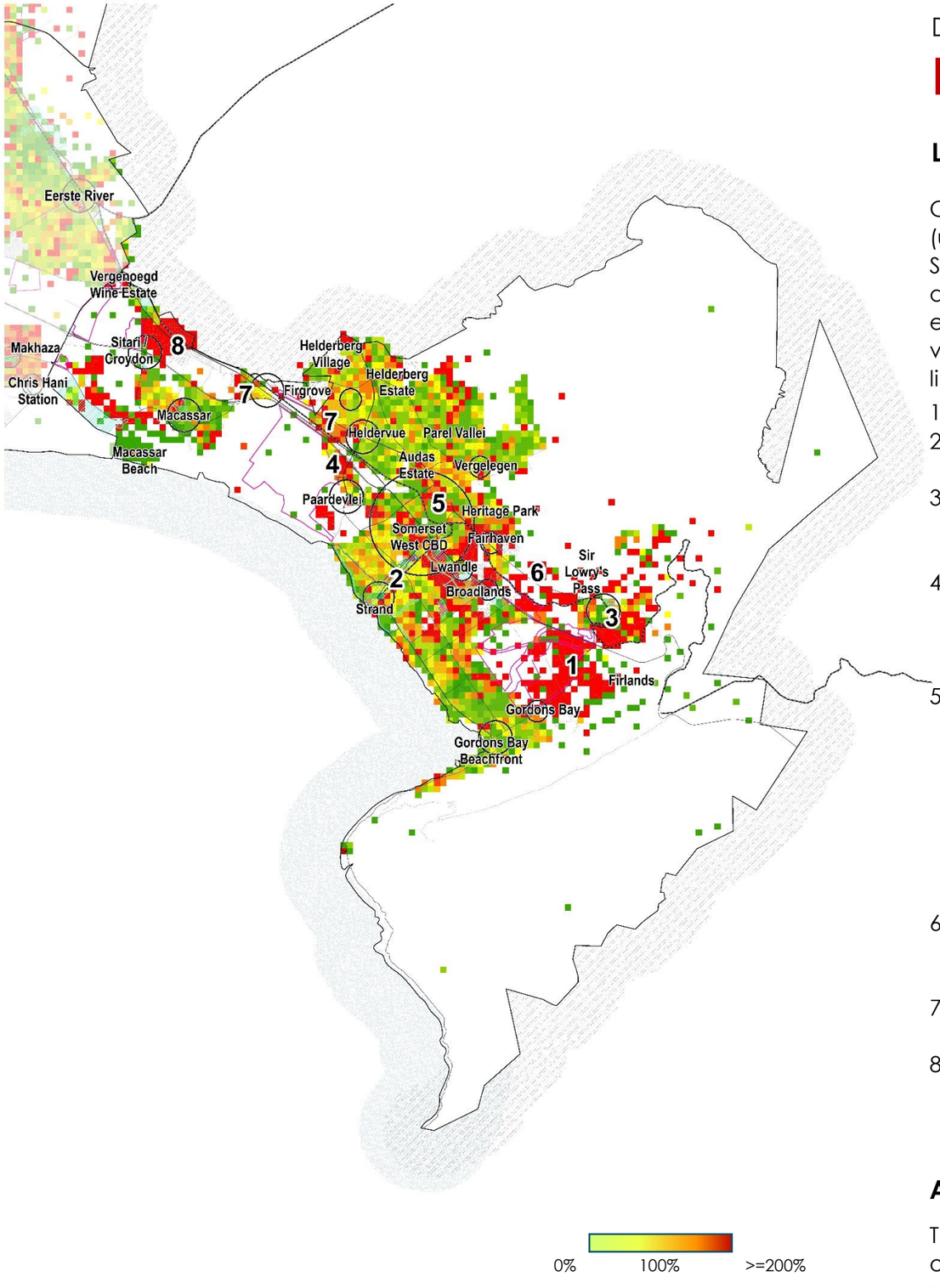
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Rolls 2012, 2015 and 2018



Map C8-a: Helderberg Change in property value (2012 to 2018)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)

LOCAL LEVEL TRENDS

Change in property values (increase) may be primarily ascribed to redevelopments (upgrades) in areas such as Sitari and Croydon estates, Firgrove, Heldervue Charles, Strand Main Road, Beach Road, Sir Lowry's Pass Road, Broadlands Industrial and along the T2 and proposed N2. Other areas where an increase in valuation is evident may be ascribed to 'implementation' of development rights on remaining vacant portions of development areas (phasing), or change in land use, which is in line with District Plan proposals.

1. Sir Lowry's Pass Road: Increase in values in view of N2 realignment.
2. Strand CBD: Increase in values to due to views and amenities and locality as well as redevelopment within the area.
3. Sir Lowry's Pass urban edge: Increase in values due to development of residential estates such as Tre Donne Country Estate, High Riding Estate, High Riding Country Estate, and Casa Maris Luxury Eco Estate.
4. Paardevlei: Increase in values due to precinct development which includes a mix of retail (Sanctuary Shopping Centre), office and industrial development, mixed residential development (single and multi) and school and hospital development (Busamed Private Hospital).
5. Somerset West CBD: Increase in value due to change in land uses and introducing a mix of land uses such as office and retail with pockets of light industrial land parcels and a mix of residential uses, which include retirement villages, multi-residential complexes such as Hageland Estate and single-residential complexes such as Sea View Lake Estate. Included in the mix of land uses are educational and medical such as the medical land uses located along the M9 as well as pockets of public open space.
6. Above the T2 between Sir Lowry's Pass and Somerset West: Increase due to non-residential development such as Monkey Town and light industrial and retail land uses.
7. Along the N2, between Somerset West local node and the Firgrove local node: Increase due to residential complex development.
8. Croydon and Sitari: Increase in value due to residential estate development, which are single-residential developments and multi-residential developments, respectively.

ALIGNMENT TO SPATIAL POLICY

The changes in valuation cannot be directly ascribed to approve spatial policy. Increase in valuation mainly occurred due to redevelopments, infill developments (phasing in development areas) and formalisation (top structures) in lower-income areas guided by approved spatial planning policy.

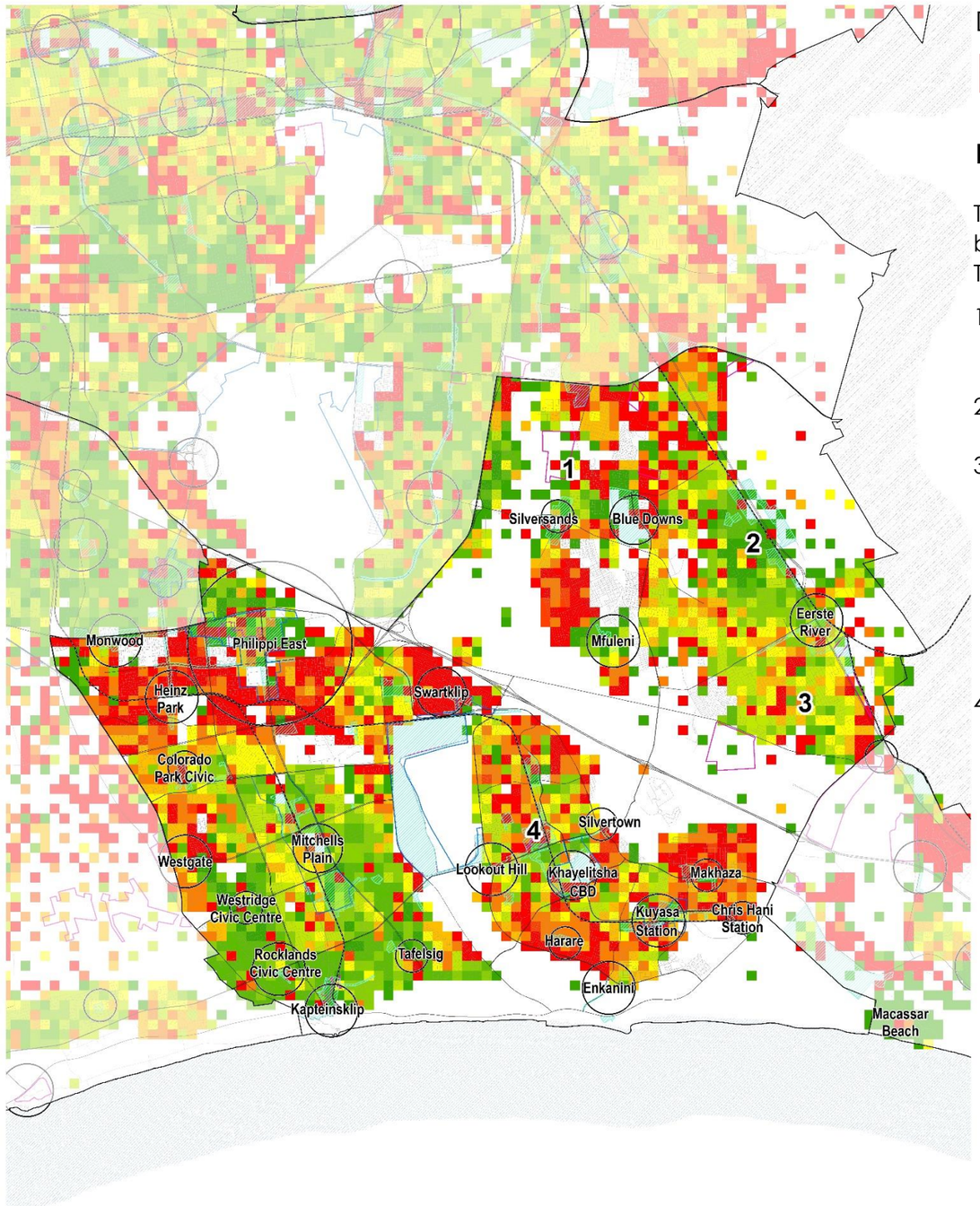
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Roll 2012, 2015 and 2018



Map C8-a KMPGBD: Change in property value (2012 to 2018)

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)

LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

The following areas have seen a reasonable increase in property value, which can be attributed to the increase in state-assisted housing and small-scale rental units. The following local observation can be made:

1. Blue Downs – Bardale Village, increase in property value can be ascribed to a massive increase in housing development by the private sector, as well as subsidised human settlement development.
2. Tuscany Glen – the area south of the CBD area has also seen a great deal of property value increase.
3. Greater Eersteriver – increase in value can be attributed to private sector housing development in the form of affordable single-residential dwelling/freestanding housing typologies, clustered similar to gated communities with added security measures. As a result, there has been a significant increase in demand for this type of affordable housing opportunities and by association, property values. This is also evident in terms of the increase of value for flats which saw a >25% increase over the past five years.
4. Khaya – commercial activity located along Spine Road and Phakamani Road has created a demand more rental units. As a result, there has been a trend for new and further intensification of existing residential development This has contributed to the increased land value in the area.

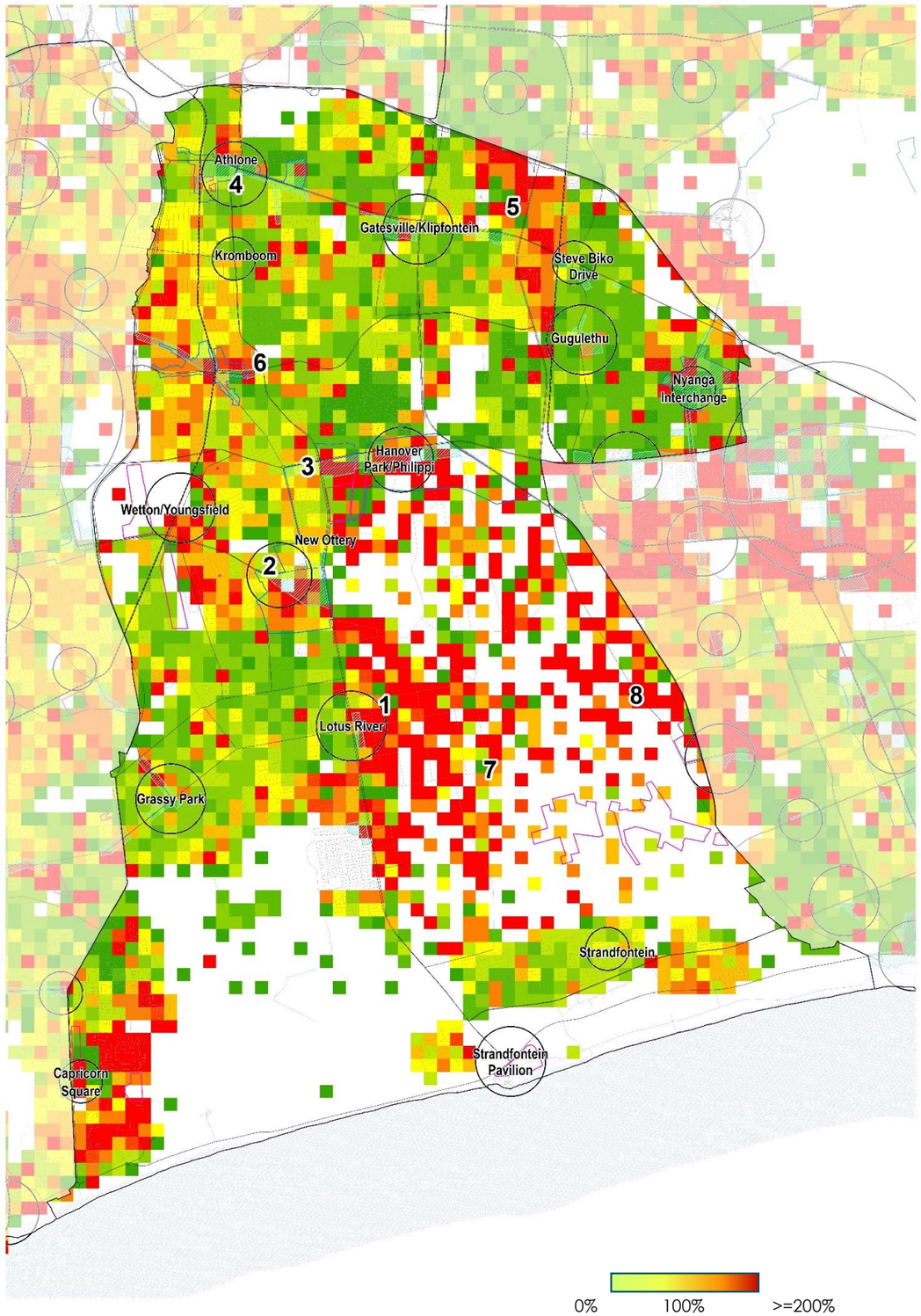
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Roll 2012, 2015 and 2018



Map C8-a Cape Flats: Change in property value (2012 to 2018)

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)

LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

The change in property values between 2012 and 2018 correlates well with areas that have seen new development/changes in use (and have supporting spatial guidance) over the period.

There has been an increase in property values in areas along development corridors and MUIAs such as Strandfontein ([1] Schaapkraal, [2] Ottery, Goven Mbeki Road, [3] Lansdowne Industria, Klipfontein Road, [4] Athlone, [5] Heideveld, Turfhall Racecourse Road (6] and Pinnati-Bellthorne).

There has been a significant change in property value in areas outside of spatial planning designations such as the [1] PHA and [8] Weltevreden Wedge area – the Wedge area is rapidly transitioning from smallholdings since the 2012 District Plan (such as the Schaapkraal area – the SDF 2023 encourages and supports this urban transformation).
Areas with the lowest valuation changes in the district include Hanover Park, Manenberg and Nyanga/Gugulethu.

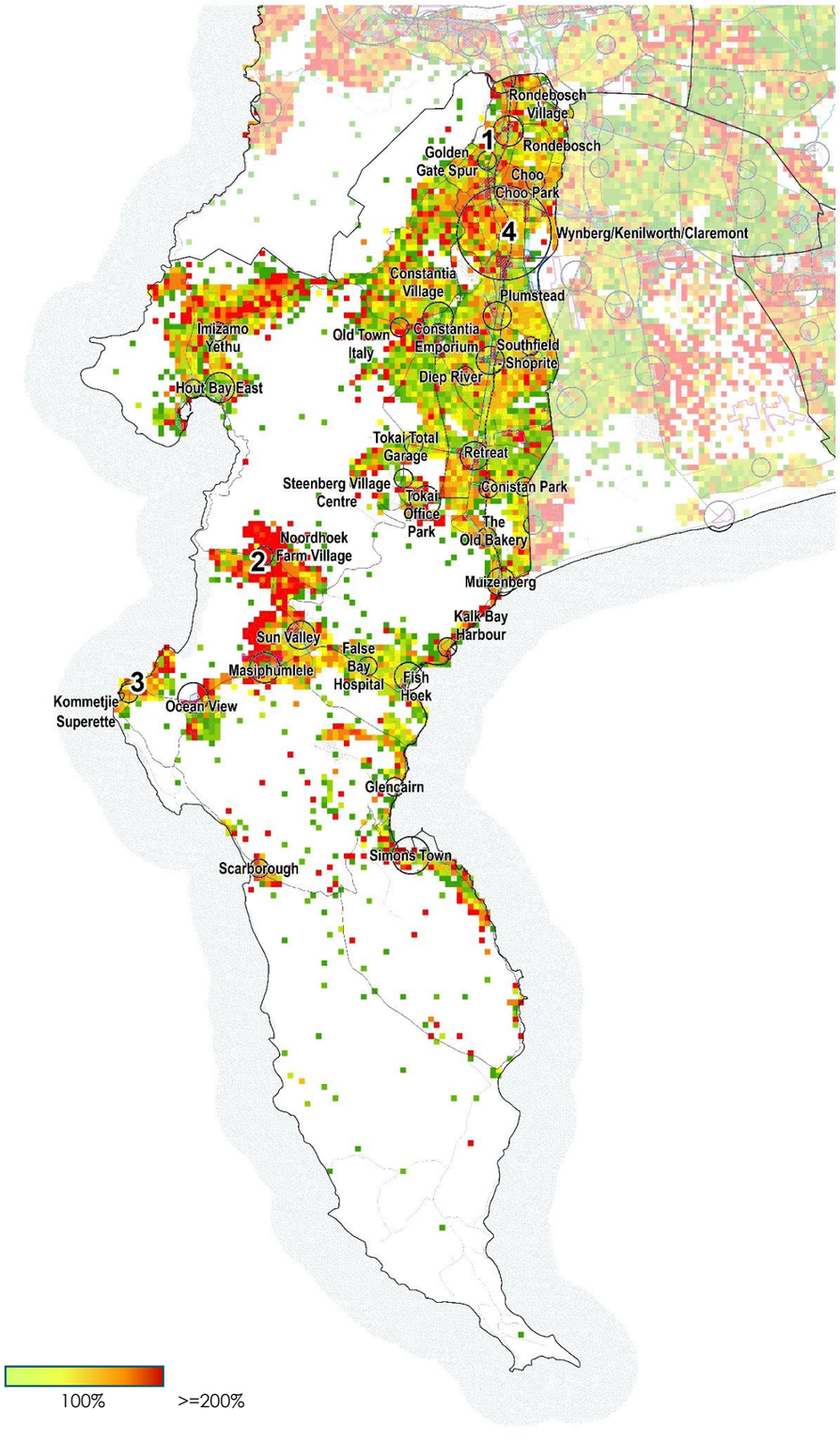
C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Source: CCT Valuation Roll 2012, 2015 and 2018



Map C8-a Southern: Change in property value (2012 to 2018)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

Change in valuation has generally been most apparent in firstly, the (closer) 'UCT sphere of influence' area ([1] Rosebank to Claremont) regarding flats development, and secondly in the peripheral valley enclaves, and particularly the relatively new 'lifestyle-orientated' residential areas of [2] Noordhoek and (to a lesser extent) [3] Kommetjie.

The [4] Claremont urban node continues to lead in property values, and indeed growth thereof, with good urban management (led by the local CID) and (as a result) continuing attractiveness as a growing satellite financial centre. Residential property value growth continues to centre around higher-income, lifestyle-orientated attractiveness associated with unique character areas (proximity to wine farms, etc.), and mountain and sea valley enclaves.

C.8

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (METRO-WIDE)

This indicator shows a change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).

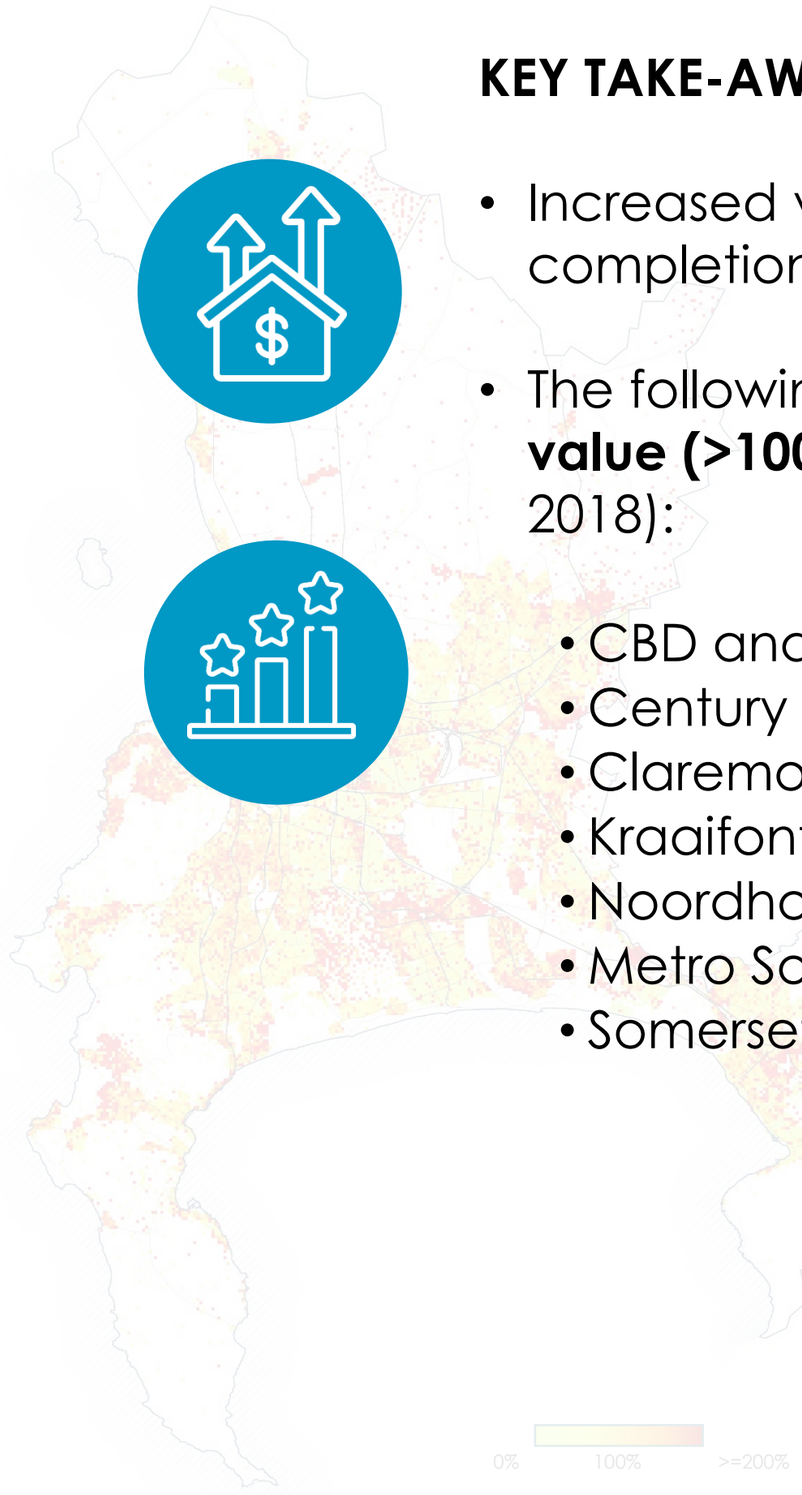
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

KEY TAKE-AWAY TRENDS:

- Increased value across the city based on new building completions since the last valuation roll.

- The following areas **exhibited the highest increase in property value (>100 %)** between the three valuation terms (2012-2018):

  - CBD and surrounds
  - Century City
  - Claremont, Kenilworth and Wynberg
  - Kraaifontein
  - Noordhoek
  - Metro South East
  - Somerset West CBD and surrounds



Map C9-a: **Change in property value (2012 to 2018).**

D : LAND AND BUILDING DEVELOPMENT

NEW DEVELOPMENT AREAS AND AREAS OF INFORMALITY

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

D.1a

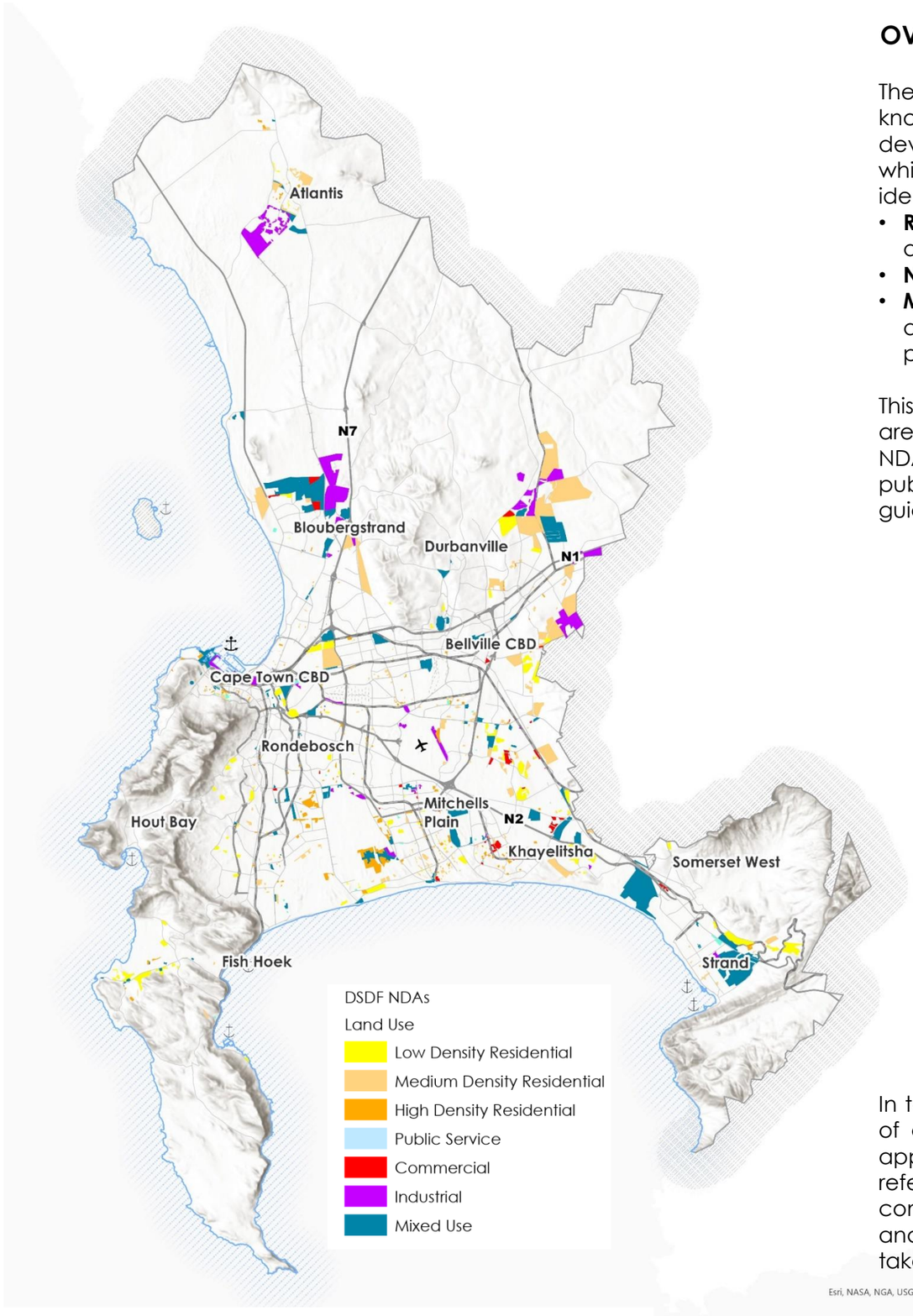
LAND AND BUILDING DEVELOPMENT

TAKE-UP OF NEW DEVELOPMENT AREAS

This indicator monitors the take-up of NDAs by analysing approved building plan applications in DAMS that are in construction or have been completed between 2020 and February 2023 in relation to the NDAs targeted by the DSDF.

Note: Each NDA has a unique site ID. The ID consists of a letter denoting its district and a number. For example A0001 refers to site no. 1 in District A – Table Bay.

Data source: DAMS Building Plan Data – January 2020 – February 2023; NDAs – DSDF 2023 and LUM 2040



Map D1a: New development areas (NDAs).

OVERALL TREND

The 2023 approved District Development Frameworks (DSDFs) proposed areas for future infill development, known as the new development areas (NDAs) – see map D1a. NDAs represent undeveloped and partially developed land parcels that are recommended for future residential and non-residential development, which were identified in order to accommodate the projected future growth of population in Cape Town identified in the 2040 Land Use Model. They are categorised as follows:

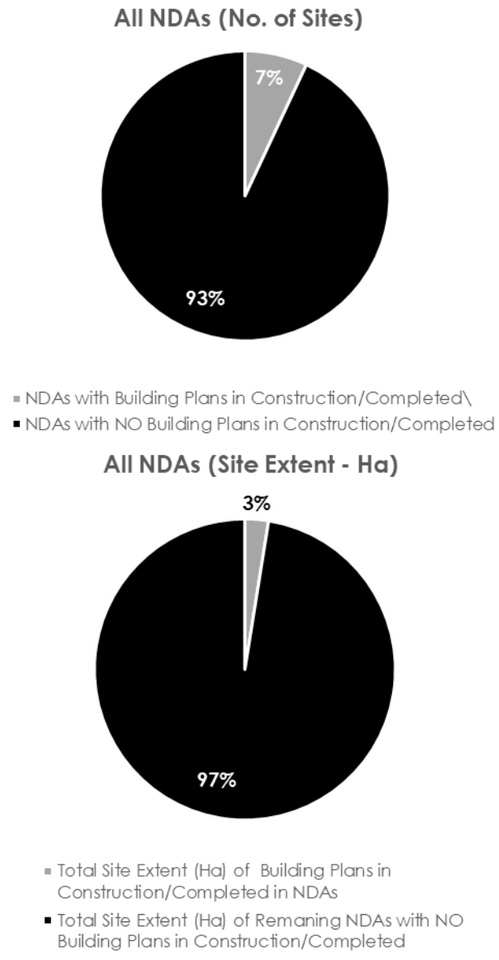
- **Residential NDAs:** Land targeted for potential low gross density (25-45 du/ha), medium gross density (45-75 du/ha) and high gross density (>75 du/ha) residential development.
- **Non-residential NDAs:** Land targeted for commercial, industrial or public service development.
- **Mixed-use NDAs:** Land targeted for a combination of residential and non-residential development or development with a combination of non-residential land uses (i.e. commercial and/or industrial and/or public services).

This indicator monitors the take-up of NDAs by analysing approved building plan applications in DAMS that are in construction or have been completed in the period between 2020 and February 2023 in relation to the NDAs targeted by the DSDF. The analysis specifically examines the alignment between new private and public sector development to gross density and land use composition targets proposed by the DSDF NDA guidelines summarised above.

NDA category	Number of NDAs	Area (ha)	NDAs with BPs (no.)	NDAs with BPs area (ha)
Residential	543	6576	33	108
Mixed use	139	4362	17	211
Commercial	50	359	2	4
Public services	22	94	1	3
Industrial	78	2194	5	16
Total	**832**	**13584**	**58**	**343**

Table D1a: NDAs with building plans in construction/completed (Jan 2020 – Feb 2023)

In total, the DSDF identified 832 NDA sites with a combined land extent of approximately 13 583 ha. Of the 832 NDAs, 58 had building plan approvals recorded as completed or in construction in the period referred to above. In terms of land extent, this represents 3% of the combined NDA extent or approximately 343 ha – refer to graph D1a and table D1a. To this end, only 3% of the NDAs identified have been taken up or developed.



Graph D1a: NDAs with Building Plans in Construction/Completed (Jan 2020 – Feb 2023)

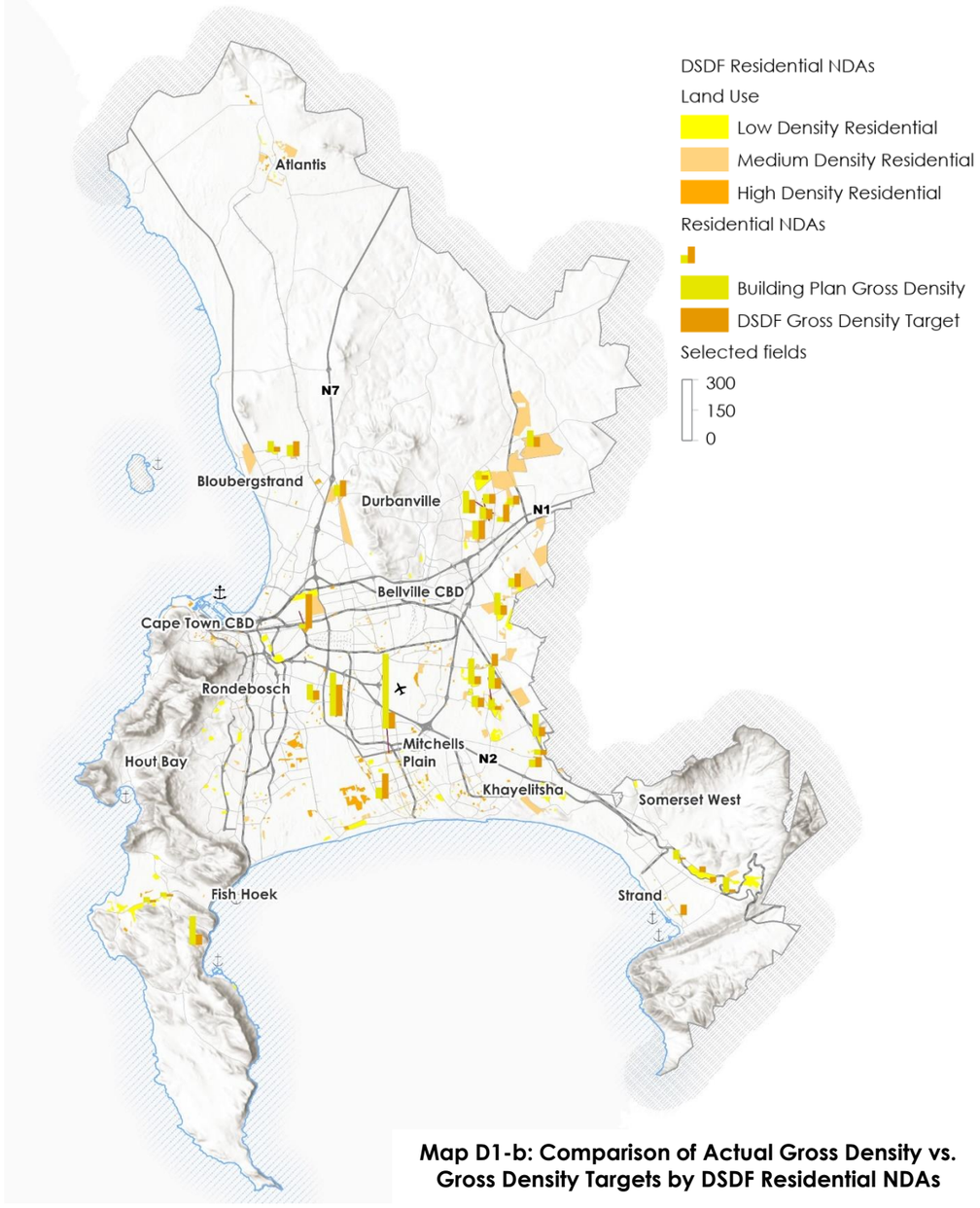
D. 1b

LAND AND BUILDING DEVELOPMENT

TAKE-UP OF NEW DEVELOPMENT AREAS

This indicator monitors the take-up of NDAs by analysing approved building plan applications in DAMS that are in construction or have been completed between 2020 and February 2023 in relation to the NDAs targeted by the DSDF.
Note: Each NDA has a unique site ID. The ID consist of a letter denoting its district and a number. For example A0001, refers to site no. 1 in District A – Table Bay.

Data source: DAMS Building Plan Data – January 2020 – February 2023; NDAs – DSDF 2023 and LUM 2040



Map D1-b: Comparison of Actual Gross Density vs. Gross Density Targets by DSDF Residential NDAs

GENERAL ANALYSIS

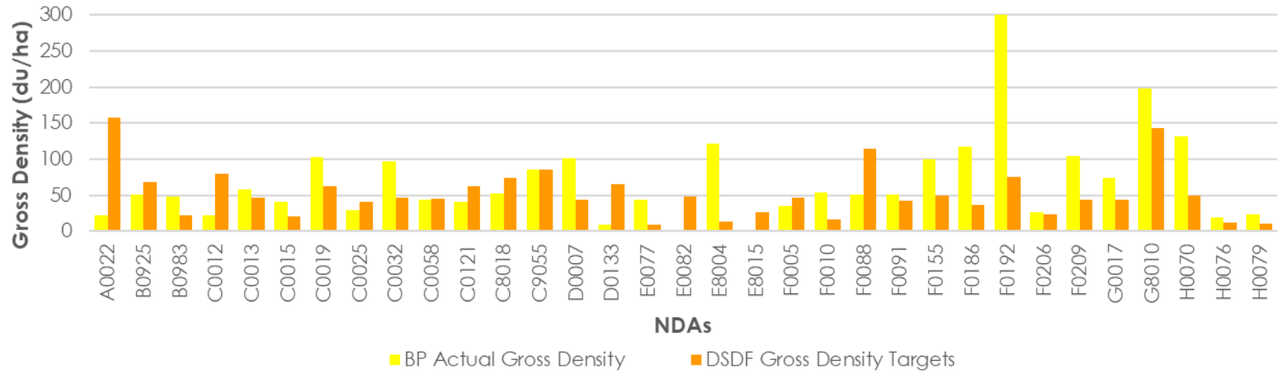
Graph D1b-b shows the composite gross density of BP in construction/completions per district and the entire metro between January 2020 and February 2023. New residential development in the Cape Flats and KPMBD districts exhibits the highest gross density of >100 du/ha due to the large number of state-assisted housing development and formal micro-development, which traditional have smaller unit sizes and plots. This is followed by Southern, Northern, Blaauwberg and Helderberg districts which have medium gross densities between 45-75 du/ha. Lastly, new development in Table Bay and Tygerberg exhibits low gross density development, likely due to the lack of vacant land. Most new developments in these districts occur through redevelopment/conversions of built areas, which is not the focus of NDAs.

RESIDENTIAL NDAs

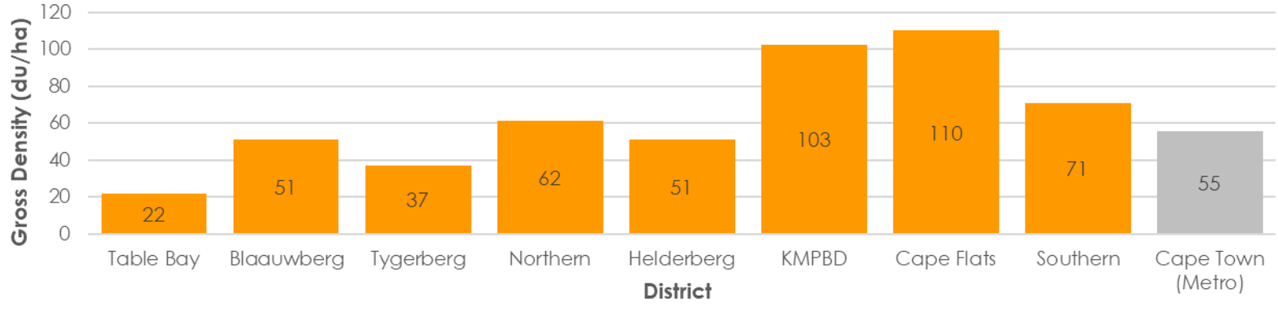
This section focuses on the portion of residential NDAs that have been taken up in terms of building plan approvals recorded as being in construction or completed in the period between January 2020 and February 2023, which amounts to approximately 6% of the total residential NDAs. However, this translates to only 3% of the total site extent of residential NDAs – see table D1a.

SPATIAL TRENDS

Map D1b and graph D1b-a depict the residential NDAs identified in the DSDF, categorised by their densification targets (i.e. low, medium or high). The bar graphs on the map depict gross density of BPs in construction or that have been completed between January 2020 and February 2023 (yellow bar) compared to the DSDF target (orange bar).
The majority of BP approvals in construction or completed are developed at a density equivalent to or surpassing the DSDF gross density targets, which indicate positive alignment to spatial policy. There are some NDAs that have been developed at densities below the DSDF targets; however, it is important to note that a BP approval for a property does not necessitate that it is for an entire NDA, as the NDA consists of a number of land parcels or properties. This means that only a portion of the NDA has been developed. In the future, remaining portions of the NDA could be developed at higher densities, which could bring the total density to a figure higher or in line with the DSDF gross density target for said NDA. For example, NDA C0025 (an NDA in the Northern District) has a combined site extent of 3,5 ha, however only 2,5 ha of the site has a building plan approval, which means that 1 ha of the composite NDA has not been developed or applied for through the building plan application process.



Graph D1b-a: Comparison of Actual Gross Density vs. Gross Density Targets by DSDF Residential NDAs)



Graph D1b-b: Gross Density of Residential Development Constructed or in Construction between 2020 - Feb 2023 in DSDF Residential NDAs by District and Metro

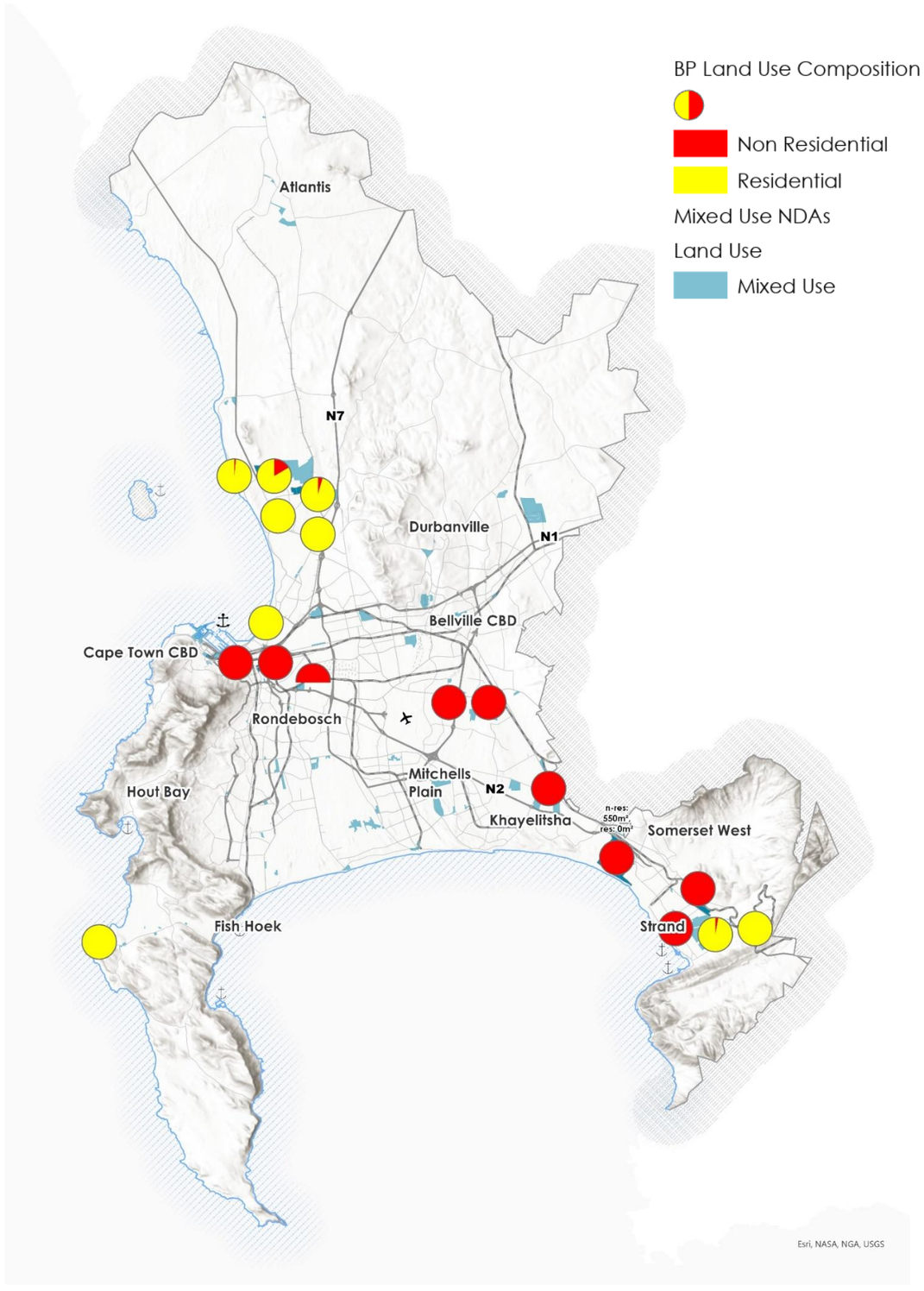
D. 1c

LAND AND BUILDING DEVELOPMENT

TAKE UP OF NEW DEVELOPMENT AREAS

This indicator monitors the take-up of NDAs by analysing approved building plan applications in DAMS that are in construction or have been completed between 2020 and February 2023 in relation to the NDAs targeted by the DSDF.
Note: Each NDA has a unique site ID. The ID consists of a letter denoting its district and a number. For example A0001, refers to site no. 1 in District A – Table Bay.

Data source: DAMS Building Plan Data – January 2020 – February 2023; NDAs – DSDF 2023 and LUM 2040



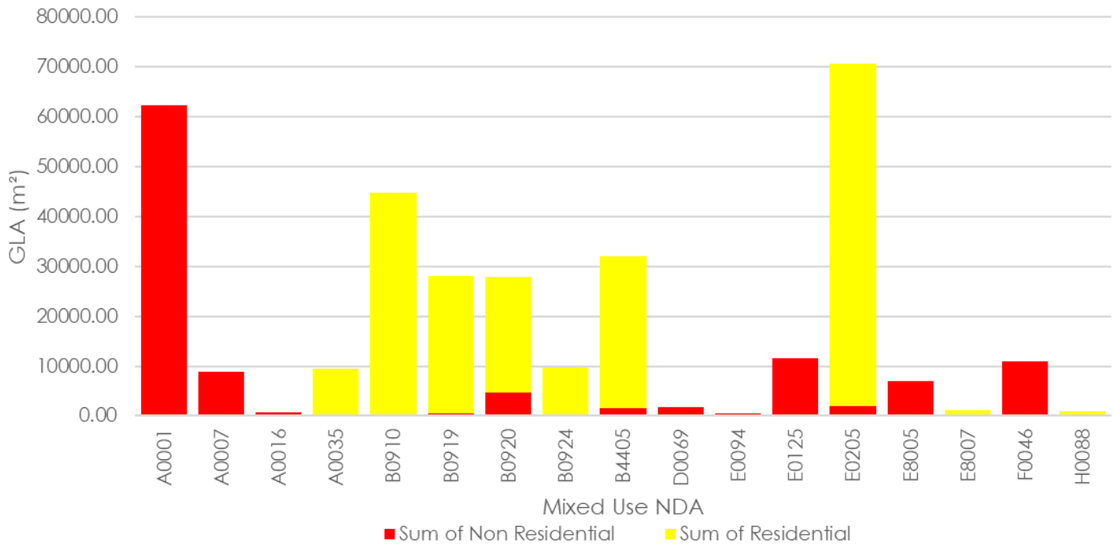
Map D1c: Composition of residential and non-residential bps in relation to mixed use NDAs

MIXED-USE NDAs

This section focuses on the portion of mixed-use NDAs that have been taken up through building plan approvals recorded as being in construction or completed in the period between January 2020 and February 2023, which amounts to approximately 12% of the total mixed-use NDAs in terms of the number of sites. However, this translates to only 5% of the total site extent of mixed-use NDAs – see table D1a.

SPATIAL TRENDS

Map D1c and graph D1c depict the quantum of residential to non-residential development (GLA) in construction or that have been completed in relation to the mixed-use NDAs. About 50% of BPs show some mix of non-residential and residential development. NDAs with BPs that show only non-residential development do not necessitate that there is no mix of land uses. These specifically have a mix of non-residential land uses (i.e. commercial and/or industrial and/or public services), which is consistent with the DSDF guidelines for mixed-use development. For example, A0001 consists of offices, retail and a restaurant; however, this mix cannot be shown based on how it is captured in DAMS and more specifically the building plan data. What is noticeable is that in Blaauwberg, BPs in mixed-use NDAs do not reflect a significant mix of land uses as the dominant use is residential, thus currently demonstrating poor alignment with policy. However, this could change as new BP applications are submitted and developed in the future.



Graph D1c: Composition of residential and non-residential bps in relation to mixed use NDAs

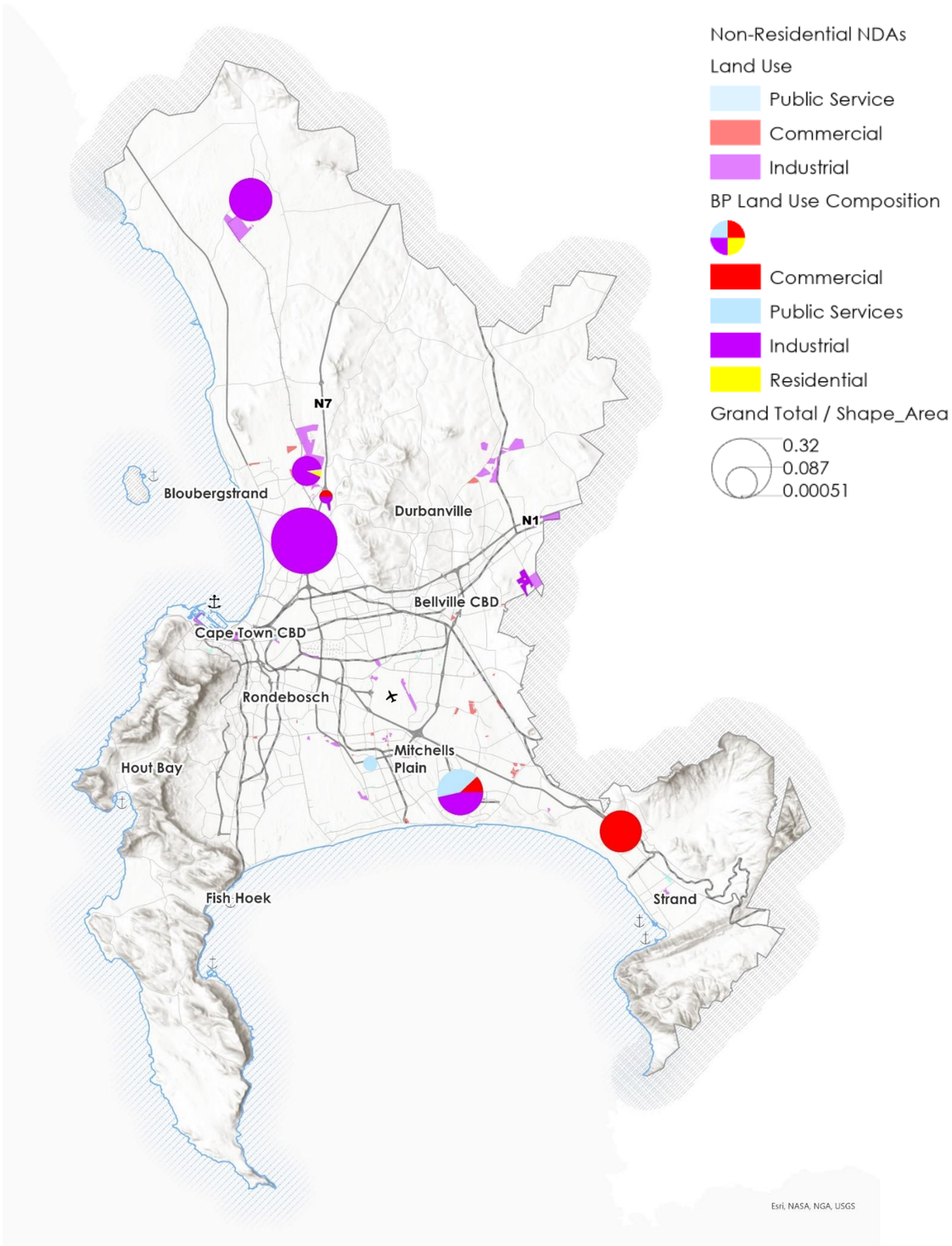
D. 1d

LAND AND BUILDING DEVELOPMENT

TAKE-UP OF NEW DEVELOPMENT AREAS

This indicator monitors the take-up of NDAs by analysing approved building plan applications in DAMS that are in construction or have been completed between 2020 and February 2023 in relation to the NDAs targeted by the DSDF.
Note: Each NDA has a unique site ID. The ID consist of a letter denoting its district and a number. For example A0001, refers to site no. 1 in District A – Table Bay.

Data source: DAMS Building Plan Data – January 2020 – February 2023; NDAs – DSDF 2023 and LUM 2040



Map D1d: **Composition of non-residential bps land use in relation to non-residential NDAs**

NON-RESIDENTIAL NDAs

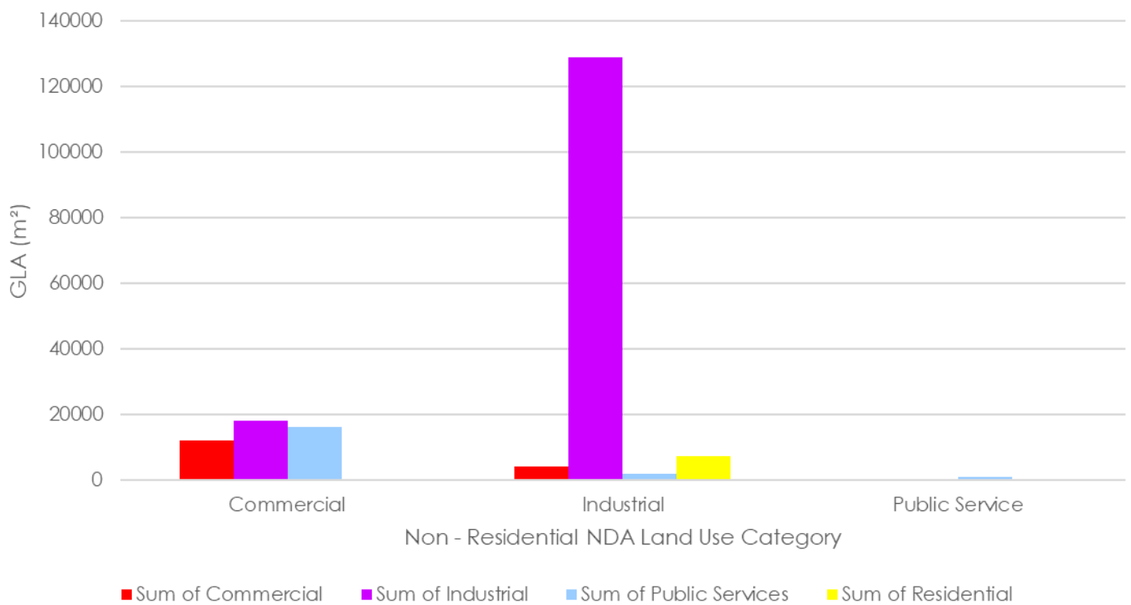
This section focuses on the portion of NDAs targeted for non-residential development (i.e. either commercial, industrial or public services) that have been taken up through building plan approvals recorded as being in construction or completed in the period between January 2020 and February 2023 related to said NDAs. This amounts to approximately 5% of the total non-residential NDAs in terms of the number of sites. However, this translates to only 1% of the total land extent of non-residential NDAs – see table D1a.

SPATIAL TRENDS

Map D1d depicts the sum of commercial, industrial, public service and residential development (GLA) in terms of building plan (BP) approvals recorded as being in construction or completed between January 2020 and February 2023. The BPs are extracted and added in relation to each non-residential NDA targeted for commercial, industrial or public service development. Graph D1d shows the cumulative development of BPs in relation to their respective NDAs.

Based on maps and graphs on this panel, the following trends can be observed:

- There is good alignment with areas targeted for industrial development and public services by the DSDF, as the dominant type of development completed/in construction thus far in these areas is for targeted land use.
- There is currently poor alignment with areas targeted for commercial development as the dominant land use of development completed/in construction thus far, is for industrial and public service.
- Between January 2020 and February 2023, industrial NDAs incurred the most development in terms of GLA.



Graph D1d: **Composition of non-residential bps land use in relation to non-residential NDAs**

KEY TAKE-AWAY TRENDS:

- Continued **new development in the northern areas** of the city due to availability of vacant land.

- **Density targets** for new residential development thus far, in most districts, **are being met or exceeded,** which demonstrates good alignment to spatial policy but also a need to review current densification targets depending how trends track in the future.

- Development in mixed-use **NDAs is fairly mixed**. **Approximately 50%** of BPs in these areas show some mix of non-residential and residential development. Others **show a mix of non-residential land uses**, with exception of NDAs in Blaauwberg, which is predominantly residential.

- There is **good alignment with NDAs targeted for industrial development and public services** by the DSDF as the dominant type of development completed/in construction thus far in these areas is for said targeted land use.

- Between January 2020 and February 2023, **industrial NDAs incurred the most development in terms of GLA**.

- There is currently **poor alignment with areas targeted for commercial development** as the dominant land use of development completed/in construction in commercial NDAs thus far is for industrial and public service.

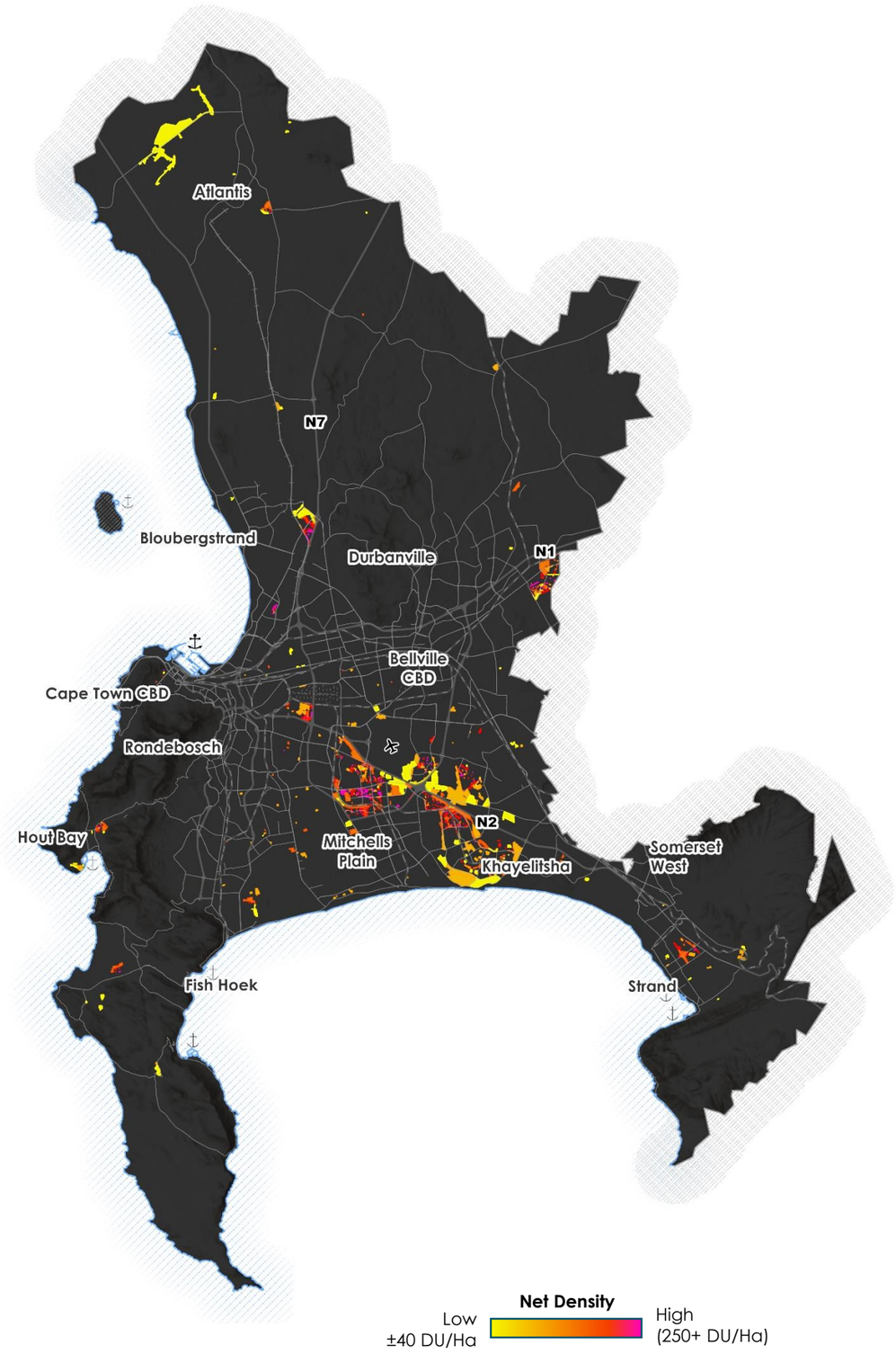
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (METRO-WIDE)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2021).

Data source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2021)



Map D2-a: Varying location, extent and density of areas of informality (2002-2021)

OVERALL TREND

In late 2021, there were +/- 247 187 informal structures in several areas of varying size and density in Cape Town. Graph D2-a shows the number of structures and extent of the areas of informality since 2002. Map D2-a shows the density (number of structures divided by the extent of the area) of different areas of informality at its maximum footprint (i.e. all areas 2002-2021).

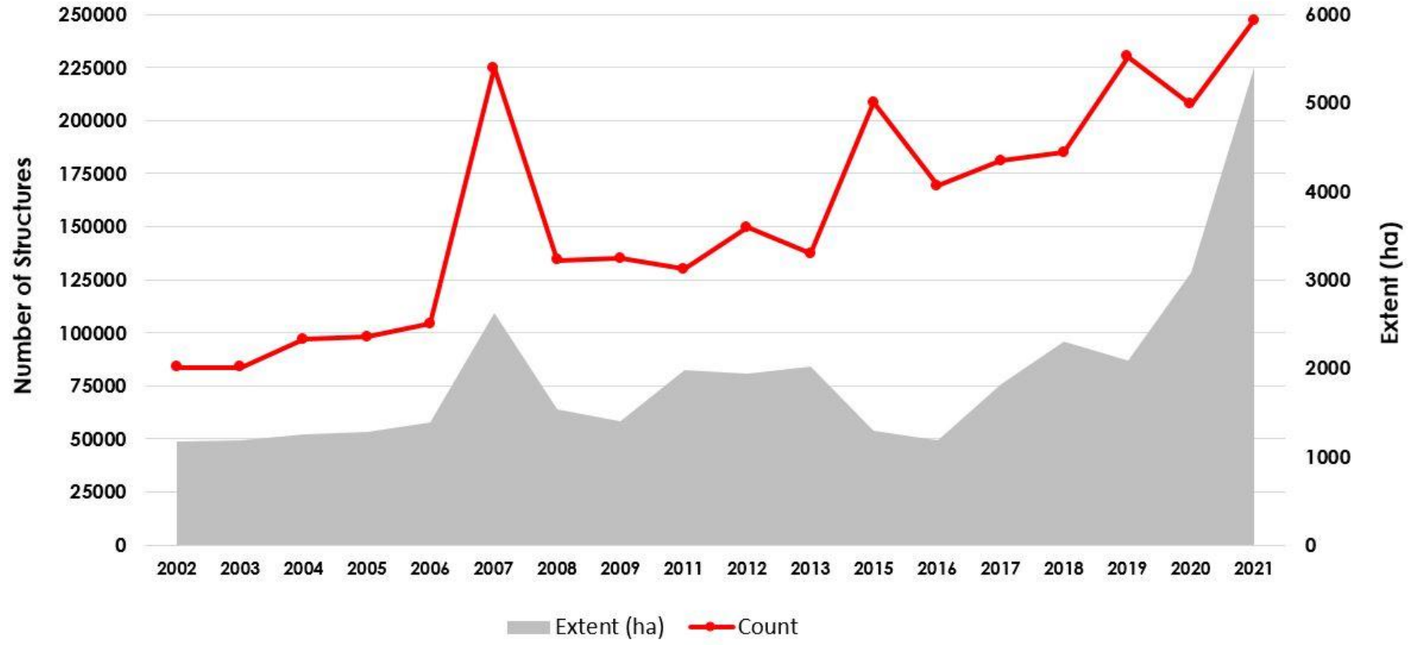
SPATIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the N2, N1 and N7. Although the location of these clusters remains fairly consistent, they may grow in size and density over time. Informal areas may also disappear from the map once formalised or relocated, and new areas form elsewhere. Since 2019, additional areas have been unlawfully occupied but these are not shown on the map or included as recognised areas of informality at present.

GENERAL ANALYSIS

Areas of informality include portions of land that are not suitable (safe) for residential development or that are used for or intended to be used for other purposes/urban support functions. Examples of such land include core biodiversity areas, 1:100-year floodplains, airport noise contours, road and rail reserves, servitudes (e.g. power line servitudes), and landfill sites.

Indicator F1 (provision of government-subsidised housing) shows a spatial correlation with areas of informality where incremental informal settlement upgrading has occurred, most noticeably in the Metro Southeast.



Graph D2-a: Number of informal structures per year, excluding areas of unlawful land occupation

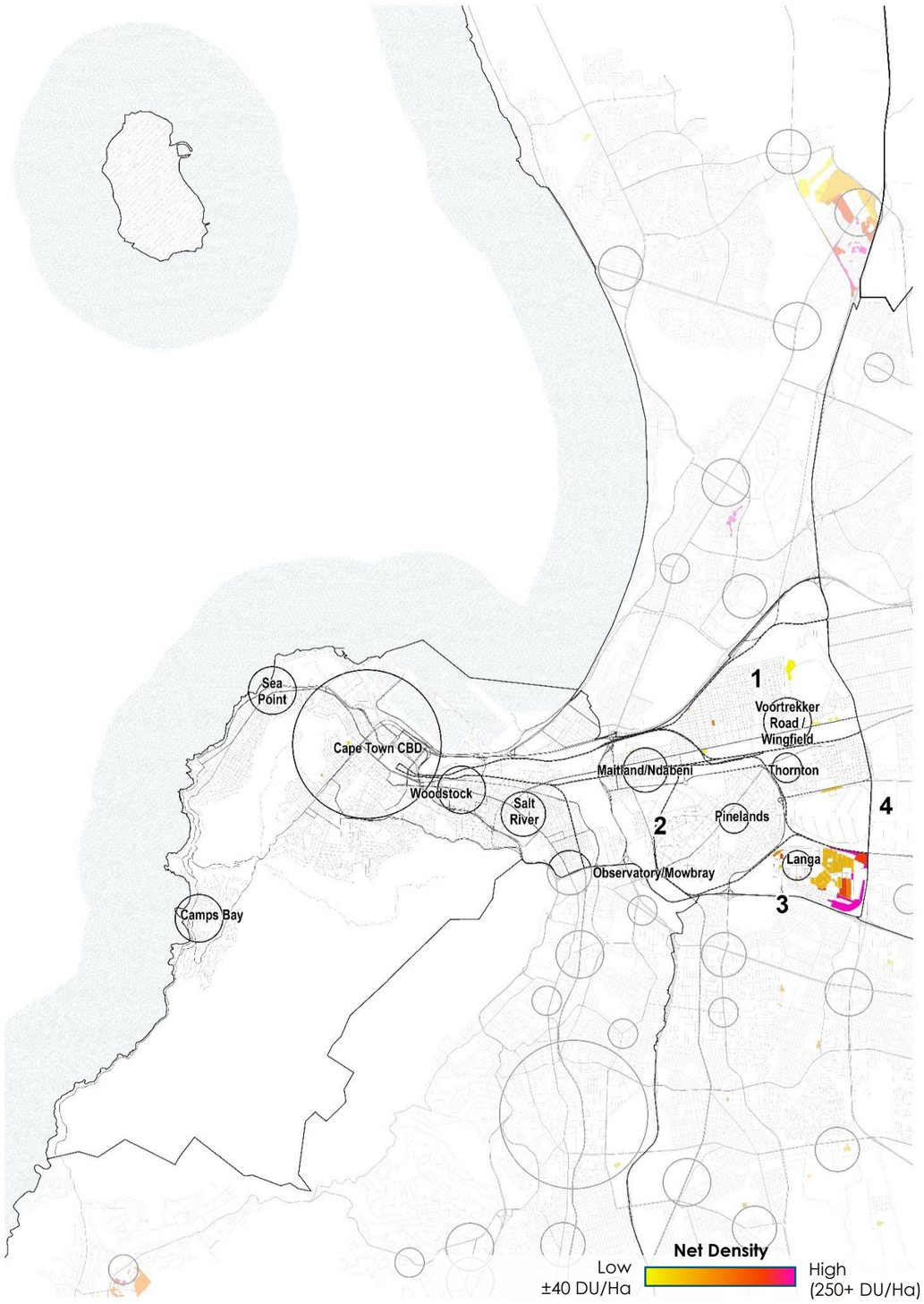
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a Table Bay: Areas of informality (2021)

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)

SPATIAL TREND (DISTRIBUTION/PATTERN)

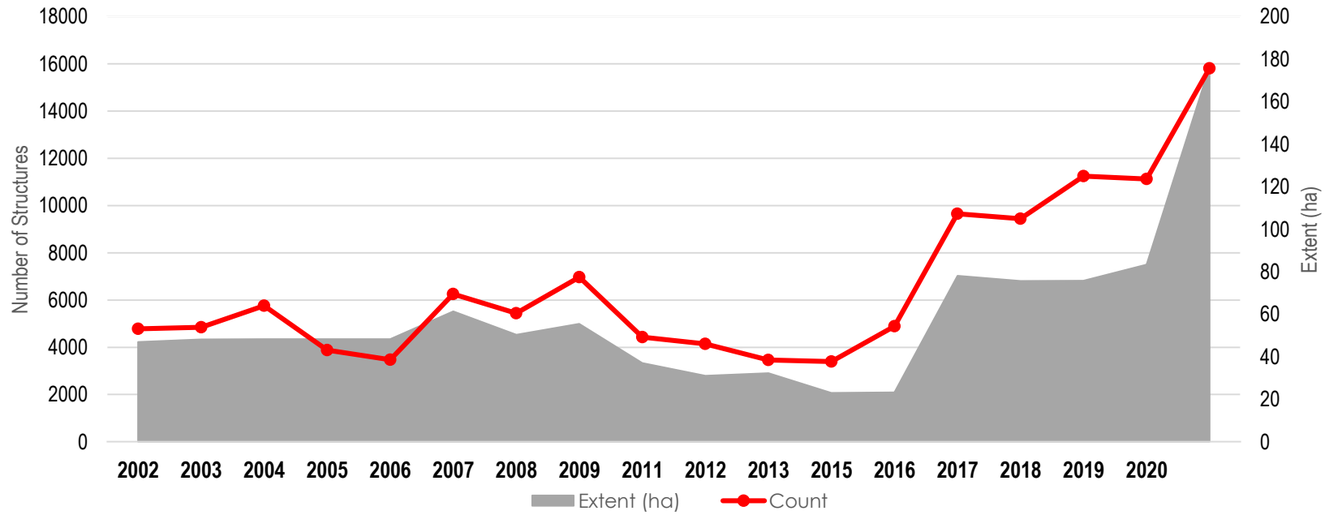
Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the N2, N1 and N7. Within the Table Bay District, areas of informality are concentrated within Langa, which is located along the N2 and is one of the densest AoIs in the district and possibly one of the most established and oldest informal settlements in the metro. Variations in density are evident within Langa with the areas in the south showing the most significant densities in terms of the number of structures by hectare (i.e. 250+ du/ha), where vacant land has been occupied. Homelessness and 'tent cities' have also started to emerge in the district, especially within the city bowl and Sea Point area.

LOCAL LEVEL TRENDS

1. Factreton in the northeastern park of Kensington.
2. Backyarding in Maitland Garden Village.
3. Langa increase in number of structures, with vacant sites identified for other uses occupied, e.g. Langa fire station (site 4).

Small localised informal settlements/tent cities around vacant land in the CBD (see red dots).

Where AoI have been formalised, correlation to Spatial Policy is evident as in the instance of Langa (e.g. SPC residential development – if incremental informal settlement upgrading has occurred).



Graph D2-a Table Bay: Number of informal structures per year, excluding areas of unlawful land occupation

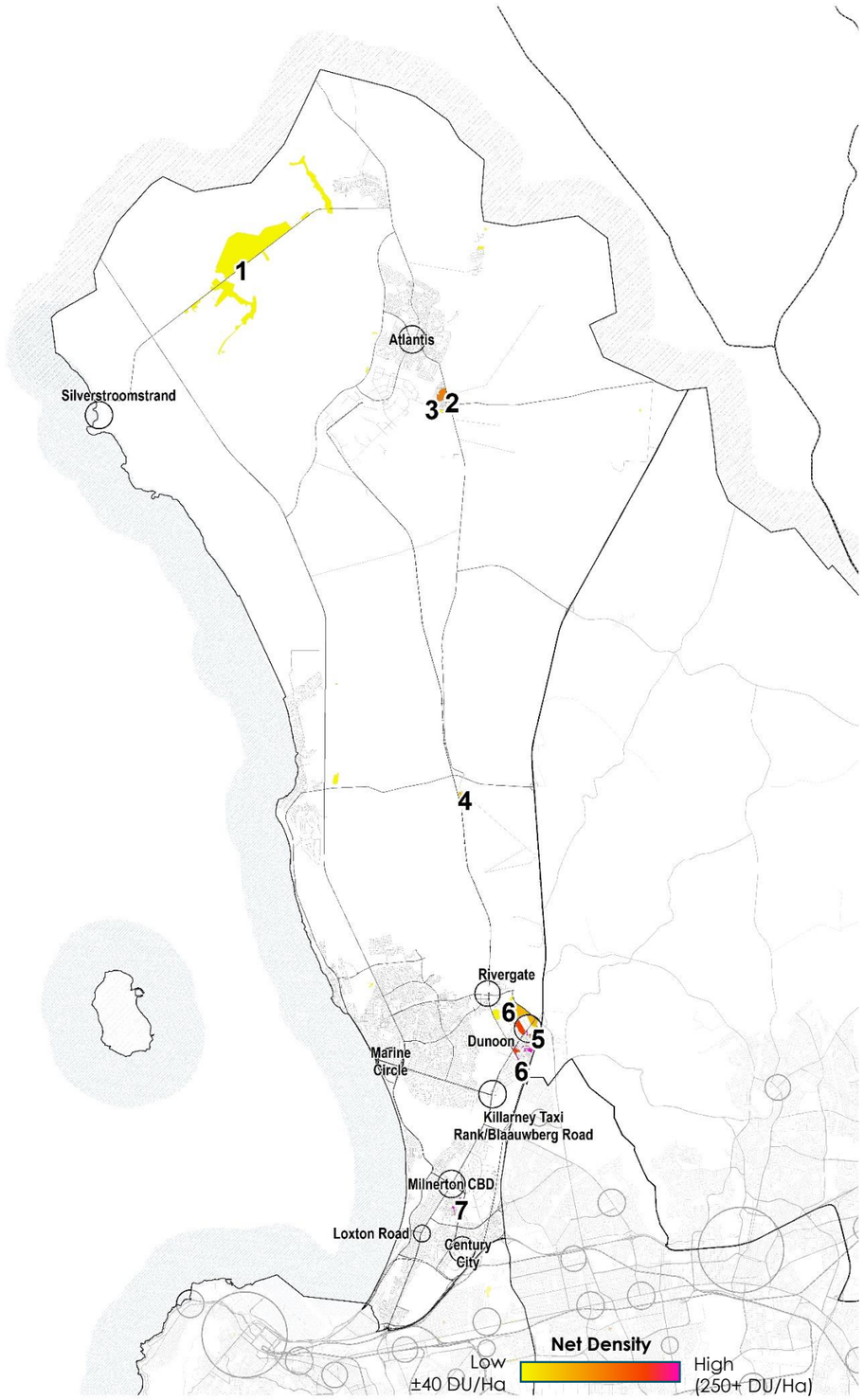
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a Blaauwberg: Areas of Informality (2021)

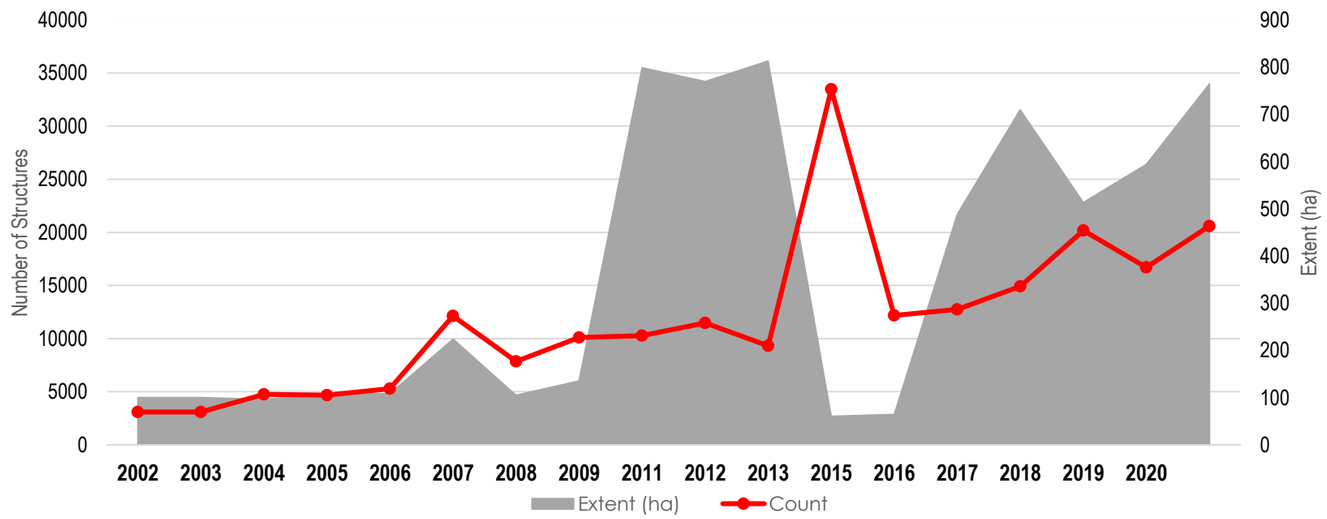
DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

LOCAL LEVEL TRENDS

1. Informal structures and farming along Silverstream Road. Not near existing residential, more low density and appears related to smallholdings.
2. Witsand – high-density, illegally occupied land intended for continuation of People's Housing Project and facilities for area. Near to job opportunities in Atlantis, including industrial area, and good road access to Cape Town.
3. Invaded private land. Near Atlantis Industrial and Witsand.
4. The majority is the existing Wolwerivier IDA. A small additional informal settlement has grown next to it as households grow out of a single IDA unit. Closely correlated with an IDA housing area. The growth in informality here can be attributed to families growing and no provision for additional units in the IDA. Relatively low density for informal, high density for formal residential.
5. Multiple informal areas in Dunoon and surrounds. Closely correlated to existing lower-income accommodation, RDP units and proximity to job opportunities in industrial corridor. Transport links to CBD and further in the city are good and not as long as from the Metro Southeast.
6. Most of the surrounding informal area, except Doornbach, which is being upgraded, is not suitable for long-term occupation and have other spatial planning designations in the District Plan. Examples include areas that are in a floodplain, in a biodiversity area, on land designated for NDA, on school sites, public open space, railway reserve. Densities are very high. Infrastructure services cannot cope.
7. Joe Slovo Park – linear public open/stormwater facility and also school site invaded. Embedded in lower-income area within a more affluent area, with excellent access to the industrial area, Koeberg Road and links to other parts of the city – i.e. well-located, very high-density AoI.

There appears to be no correlation in terms of the location of AoI to MyCiTi routes as taxis and buses are more affordable modes of transport.



Graph D2-a Blaauwberg: Number of informal structures per year, excluding areas of unlawful land occupation

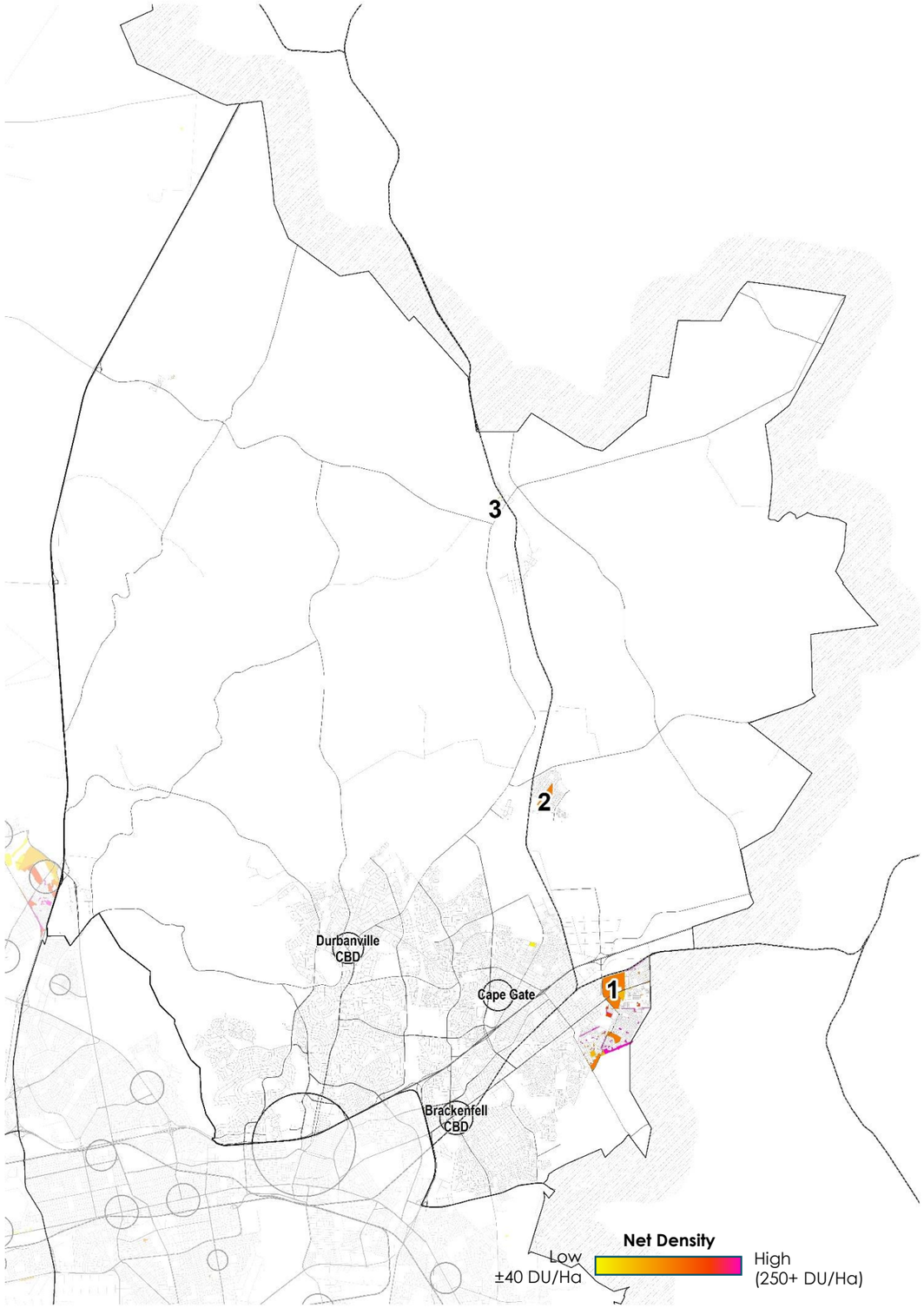
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a Northern: Areas of Informality (2021)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)

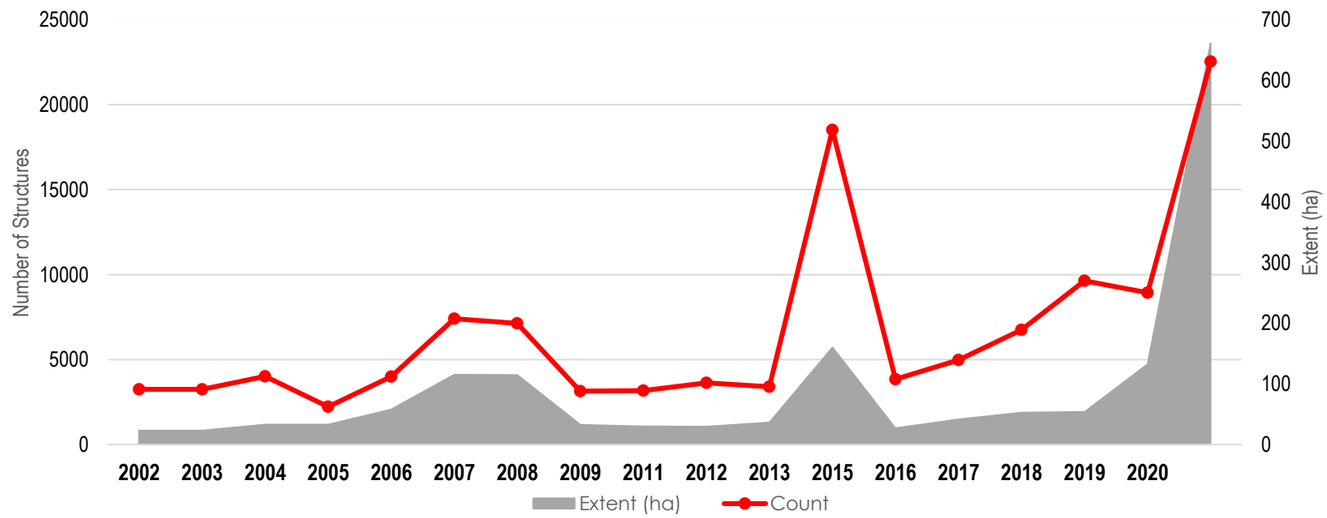
SPAIIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the major transport corridors. A significant spike in the number of informal structures was evident in 2015 and post-2019 within the Northern District. The changes (increase) in numbers of informal structures in areas such as Klipheuwel and Bloekombos/Wallacedene cannot be linked to approved spatial policy due the nature of unplanned informal growth.

LOCAL LEVEL TRENDS

The primary areas where there are a definite increase in number of structures are Wallacedene (Maroela North and South development areas) (especially during the Covid-19 period), and Klipheuwel, where there is an ever-increasing number of informal structures. Note that in the instance of Klipheuwel, it has not been identified as an NDA, as the original resolution was that the informal settlement should form part of the Greenville (Garden Cities) development at Fisantekraal.

1. Maroela North and South (development areas in Wallacedene): Illegal land occupation of NDAs in 2012 and 2023 District Plans. The latest information relates to approximately 9 500 informal structures. Note that all land use approvals have been obtained.
2. Fisantekraal: Informal settlement part of Greenville development area (NDA). It is understood that those informal dwellers do not qualify for subsidy housing.
3. Klipheuwel informal settlement: Not NDA. No intention to formalise. Objective was to relocate settlement to Fisantekraal, but to no avail.



Graph D2-a Northern: Number of informal structures per year, excluding areas of unlawful land occupation

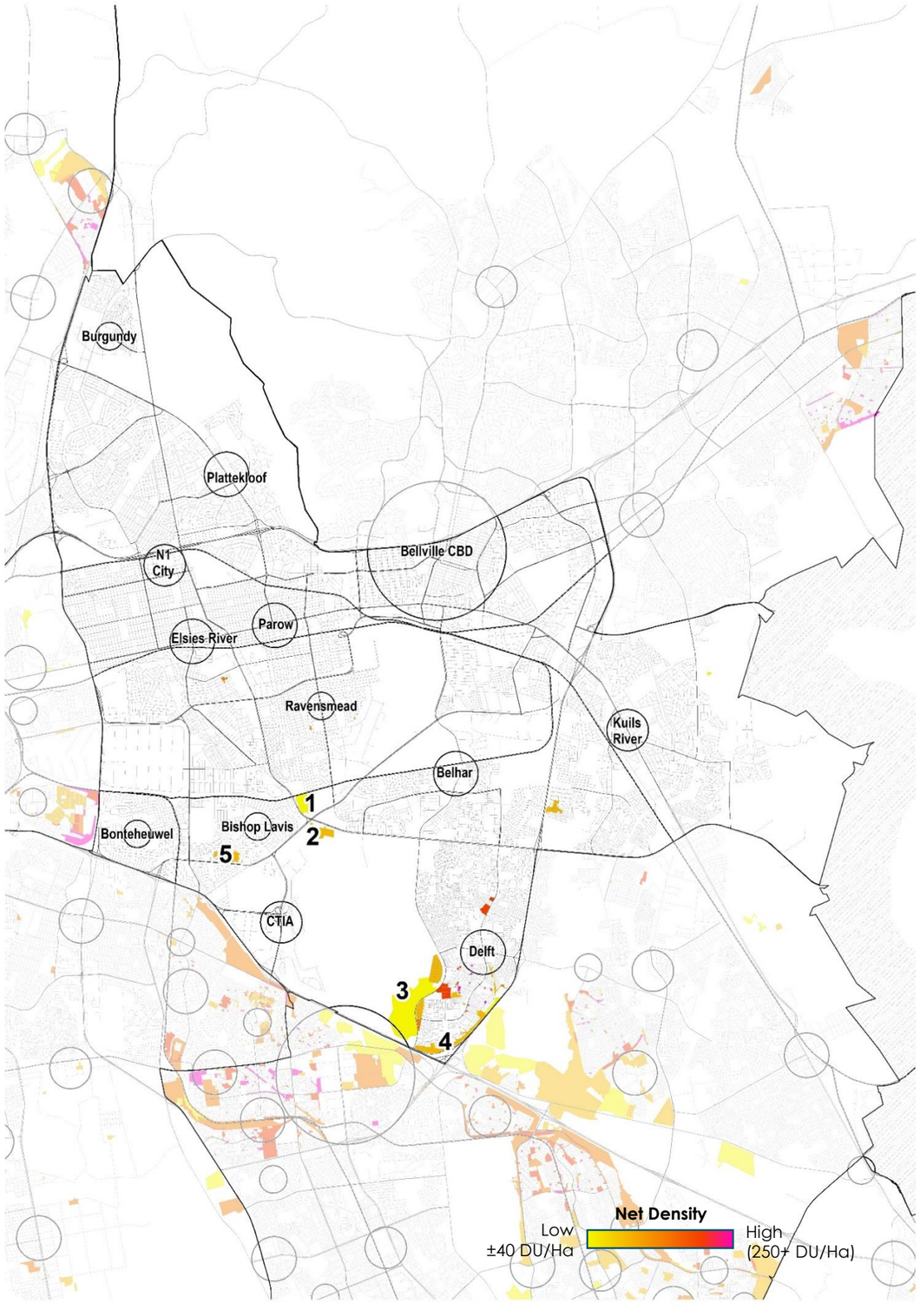
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a Tygerberg: Areas of Informality (2021)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)

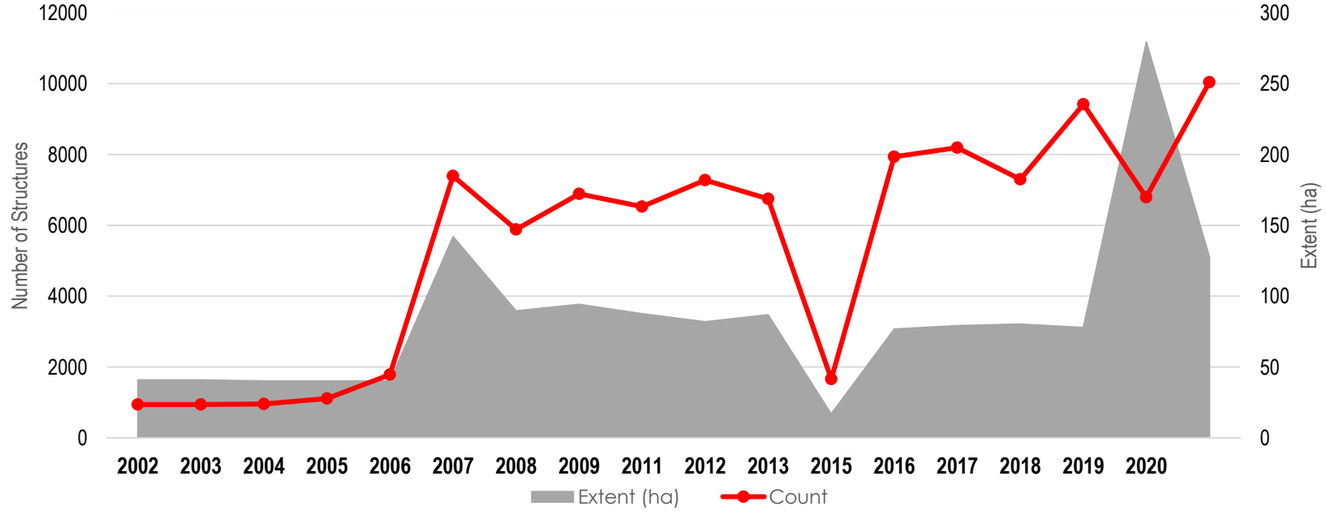
SPATIAL TREND (DISTRIBUTION/PATTERN)

The areas of informality in Tygerberg District mostly occur on land that is not suitable (safe) for residential development such as core biodiversity areas and noise contours around the Cape Town International Airport, landfill site, wetlands and servitudes. Some of these areas have been identified for alternative land uses such as industrial and employment-creating uses in the District Plan.

LOCAL LEVEL TRENDS

The section below highlights the areas where informality was observed. It is noted that most of these settlements have been in existence for some time and is dependent on subsidised human settlement projects being implemented in order for relocation to be facilitated.

1. Malawi Camp - partial relocation to Symphony Way. This site has been designated as an NDA for employment-creating opportunities, including services, industrial, commercial, warehousing and offices.
2. Freedom Park – partial relocation to Symphony Way.
3. Blikkiesdorp – partially to be formalised in Symphony Way. NDA for industrial and residential development as part of the ACSA development in the 2023 District Plan.
4. Delft South/R300 – illegal occupation of environmentally sensitive land.
5. Agste Laan informal settlement



Graph D2-a Tygerberg: Number of informal structures per year, excluding areas of unlawful land occupation

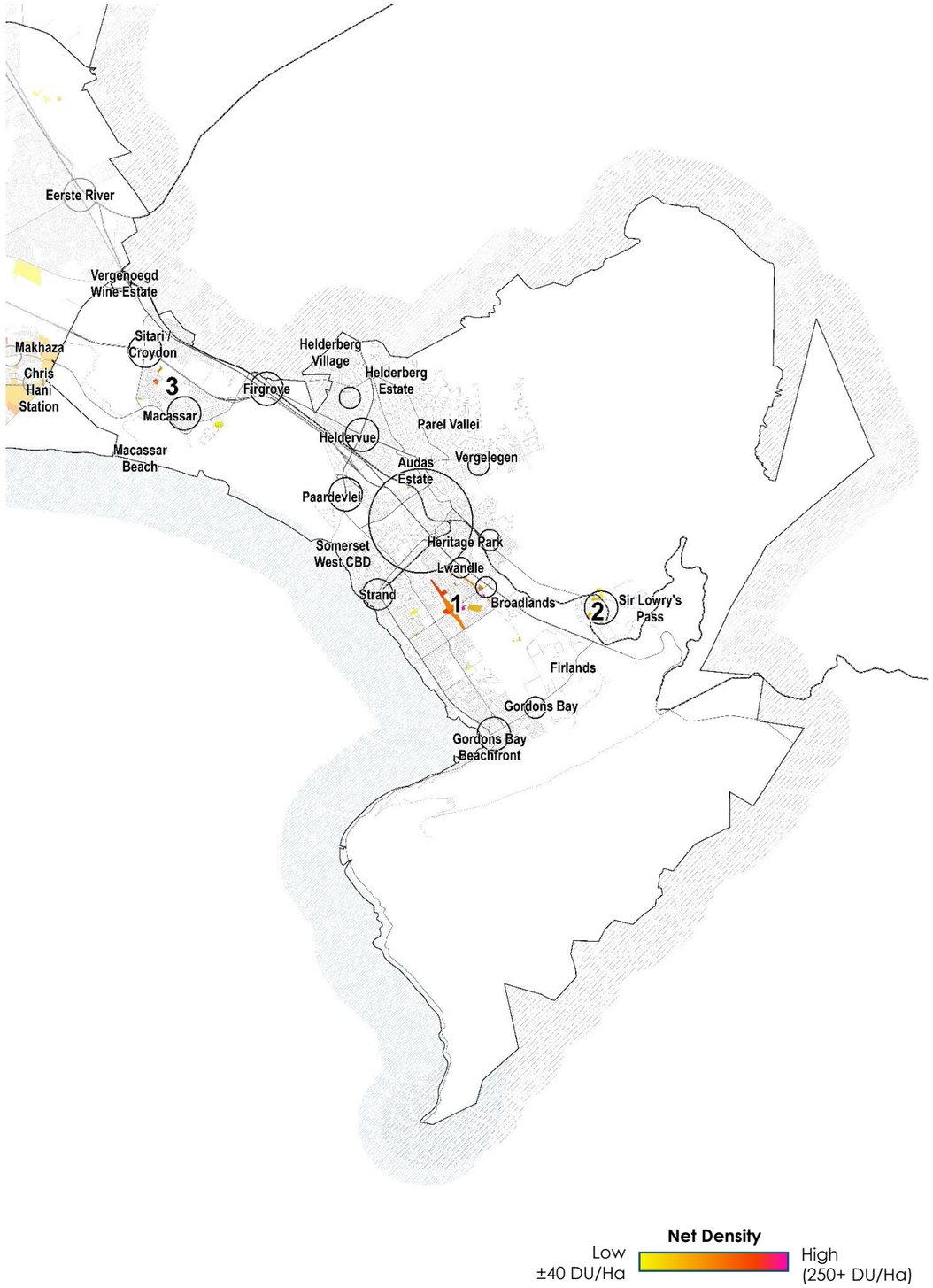
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a Helderberg: Areas of Informality (2021)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)

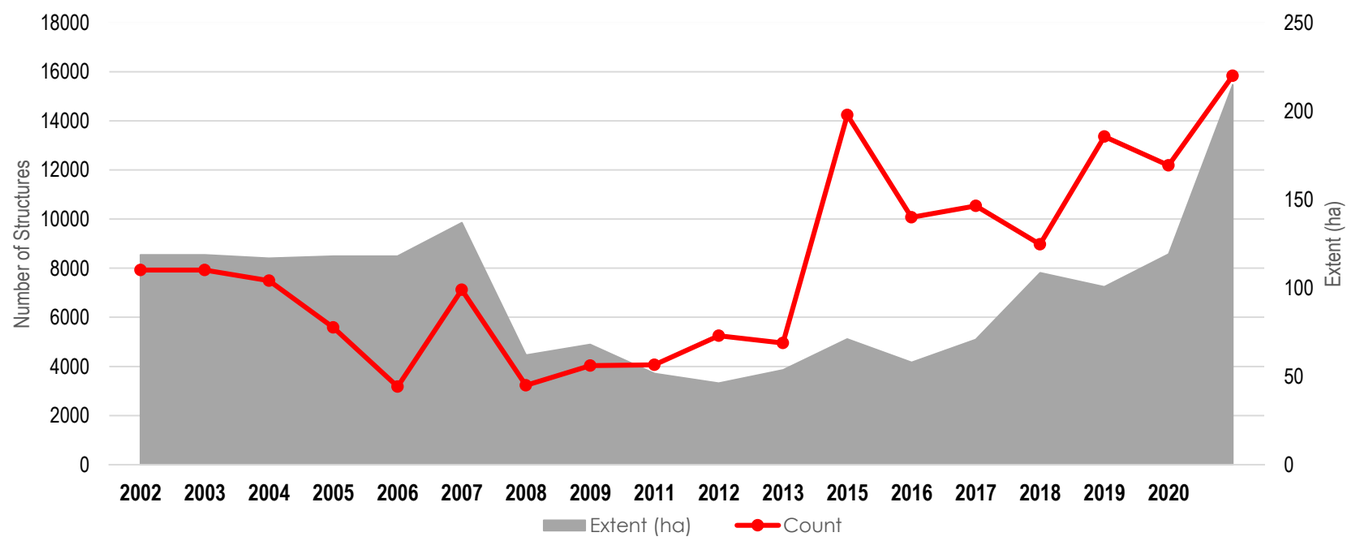
SPATIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the major transport corridors. Within the Helderberg District, areas of informality are concentrated within Lwandle and Nomzamo, which is located along the N2. In 2015, there appears to be a significant spike in the number of structures in relation to the extent of land occupied as part of the process.

LOCAL LEVEL TRENDS

The primary areas where there is a definite increase in number of structures are Macassar, Sir Lowry's Pass, Lwandle and Nomzamo where there is an ever-increasing number of informal structures.

1. Lwandle and Nomzamo: Plans to relocate informal settlement located within the N2 alignment corridor, possible relocation to the proposed Vlakteplaas development and NDA 3 (see NDAs – D1b).
2. Sir Lowry's Pass: Plans to relocate informal settlement to NDA 3 identified, Farm 845 (see NDAs – D1b).
3. Macassar informal settlement relocation to NDA 3 and 5, layout plans have been approved (See NDAs – D1b).



Graph D2-a Helderberg: Number of informal structures per year, excluding areas of unlawful land occupation

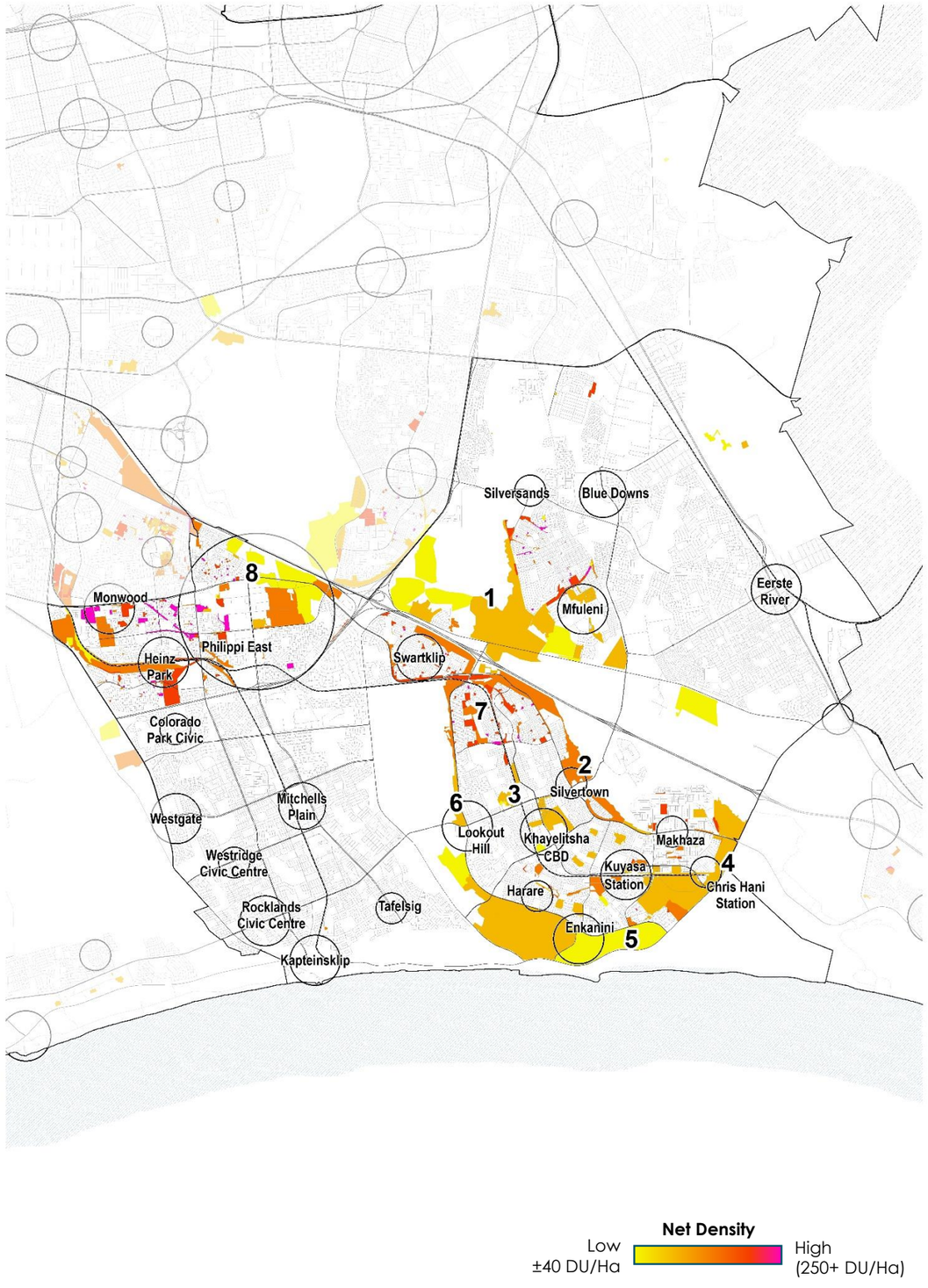
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

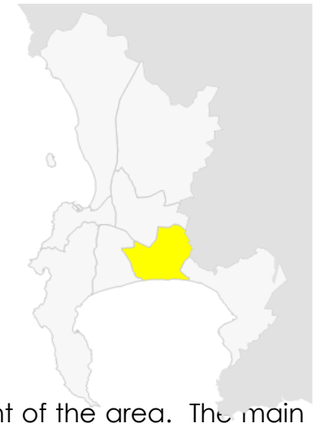
Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a KMPGBD: Areas of informality (2021)

DISTRICT LEVEL ANALYSIS

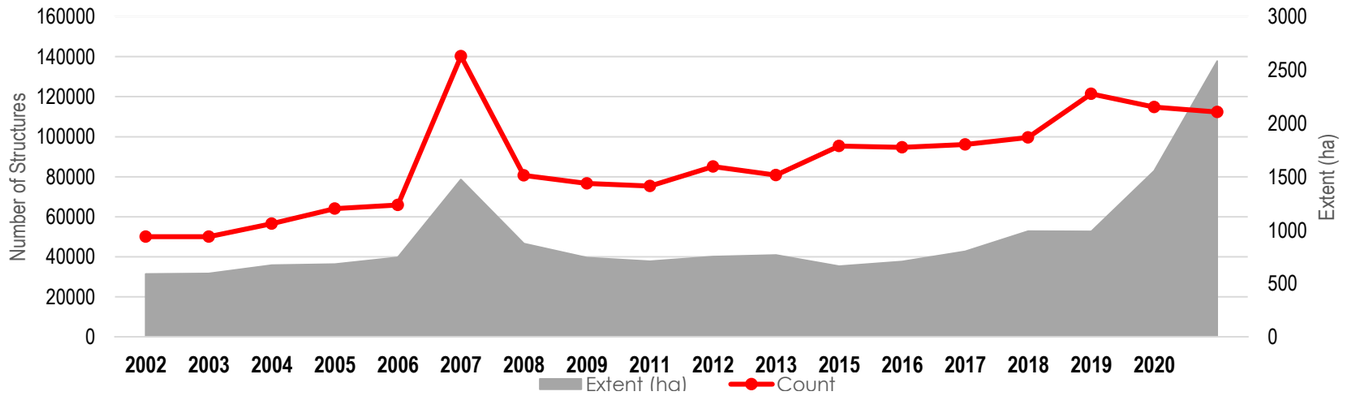
KMPGBD DISTRICT (F)



LOCAL LEVEL TRENDS

The district has seen a significant increase in the number of informal areas over time, especially during the Covid-19 lockdown. The following local observations are worth noting:

1. Driftsands – previously a proclaimed nature reserve, however, was invaded in 2021 by approximately 11 000 informal structures. The site has since been de-proclaimed and now can be considered for development, a task team has been established to develop a framework on how to deal with the redevelopment of the area. The main priority for the task team is to relocate structures that are in the immediate danger during the winter season. Further investigation is required to identify on other vacant portions of land for permanent housing opportunities to accommodate households that need to be relocated and non-residential uses, for manufacturing public facilities, and local businesses . This is supported by the (2023) District Plan.
2. Spine Road military area – this informal settlement is located in a wetland and is not in line with the District Plan vision. This area should be upgraded to a regional recreational space to cater for the under-provision of recreational spaces.
3. Khaya – the informal structures in this area, should be relocated elsewhere. The District Plan has designated this area for mixed-use development, primarily for non-residential uses and smaller potions of residential development.
4. Baden Powell – this informal settlement should be relocated as it is a safety hazard and is prone to flooding.
5. Monwabisi resort – the site has been considered for urban development, and plans to upgrade and provide serviced sites in this area are currently under way.
6. Swartklip site – the new structures encroaching onto the site, should also be relocated, to maximise the opportunity offered by the proposed development of Swartklip.
7. Site B and C – a number of structures are located within storm detention ponds and are prone to flooding, and some of these structures have taken up space for recreational purposes. Few of these structures can be upgraded/formalised; the majority of structures should be relocated.
8. Greater Philippi – the area has historically incurred significant land invasions on strategically located and appropriately zoned properties that could have supported employment generating land uses. The current proposal by the City is to upgrade the area through infrastructure and social investment, and providing serviced sites for informal settlements.



Graph D2-a KMPGBD: Number of informal structures per year, excluding areas of unlawful land occupation

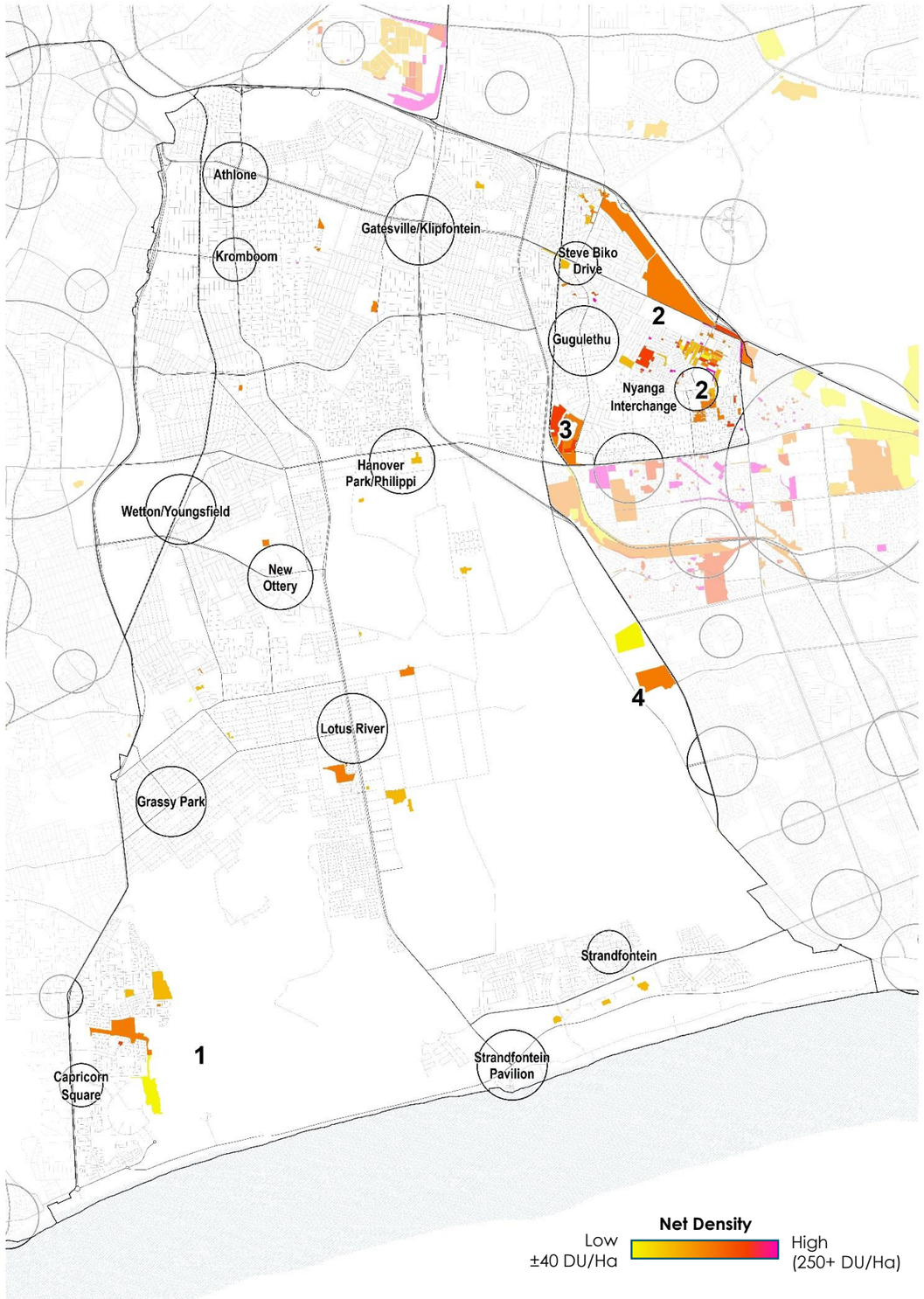
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a Cape Flats: Areas of Informality (2021)

DISTRICT LEVEL ANALYSIS

CAPE FLATS (G)

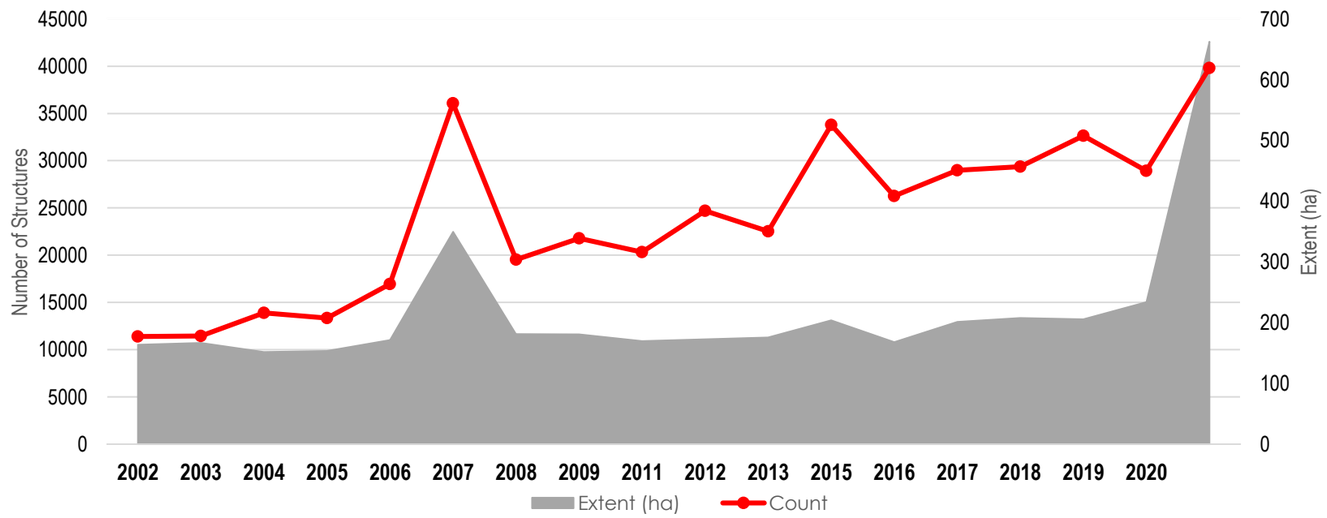
SPATIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along major transport corridors. Within the Cape Flats District, areas of informality are concentrated within Nyanga, which is located along the N2. The extent of land designated as areas of informality appear to remain fairly consistent over the period 2008-2019. From 2020, additional areas have been occupied, which coincides with the Covid-19 lockdown, when an increase in the number of structures is evident.

LOCAL LEVEL TRENDS

Areas of informality are predominantly in Vrygrond, Lavender, the Weltevreden Wedge area (Isiqalo), Gugulethu (Fezeka) and Nyanga (KTC). In terms of D1, there has not been state-assisted housing completed in these areas. A significant City-planned capital budget is allocated for the Vrygrond/Lavender Hill area, Fezeka, Hanover Park, Nyanga and Pelican Park.

1. The area of greatest informality change in this district is the invasion of the western part of the proclaimed **False Bay landfill buffer** (as an eastward expansion of Vrygrond and Lavender Hill), where rapid and substantial land invasion occurred during Covid-19 (2020-2022).
2. Other areas of informality are situated within pockets of land within formal residential areas such as **Nyanga** and
3. **Fezeka**, which have access to nodes and corridors.
4. There has been increased growth in **Isiqalo** informal settlement (Weltervreden Wedge area), which is not related to any spatial planning designations.



Graph D2-a Cape Flats: Number of informal structures per year, excluding areas of unlawful land occupation

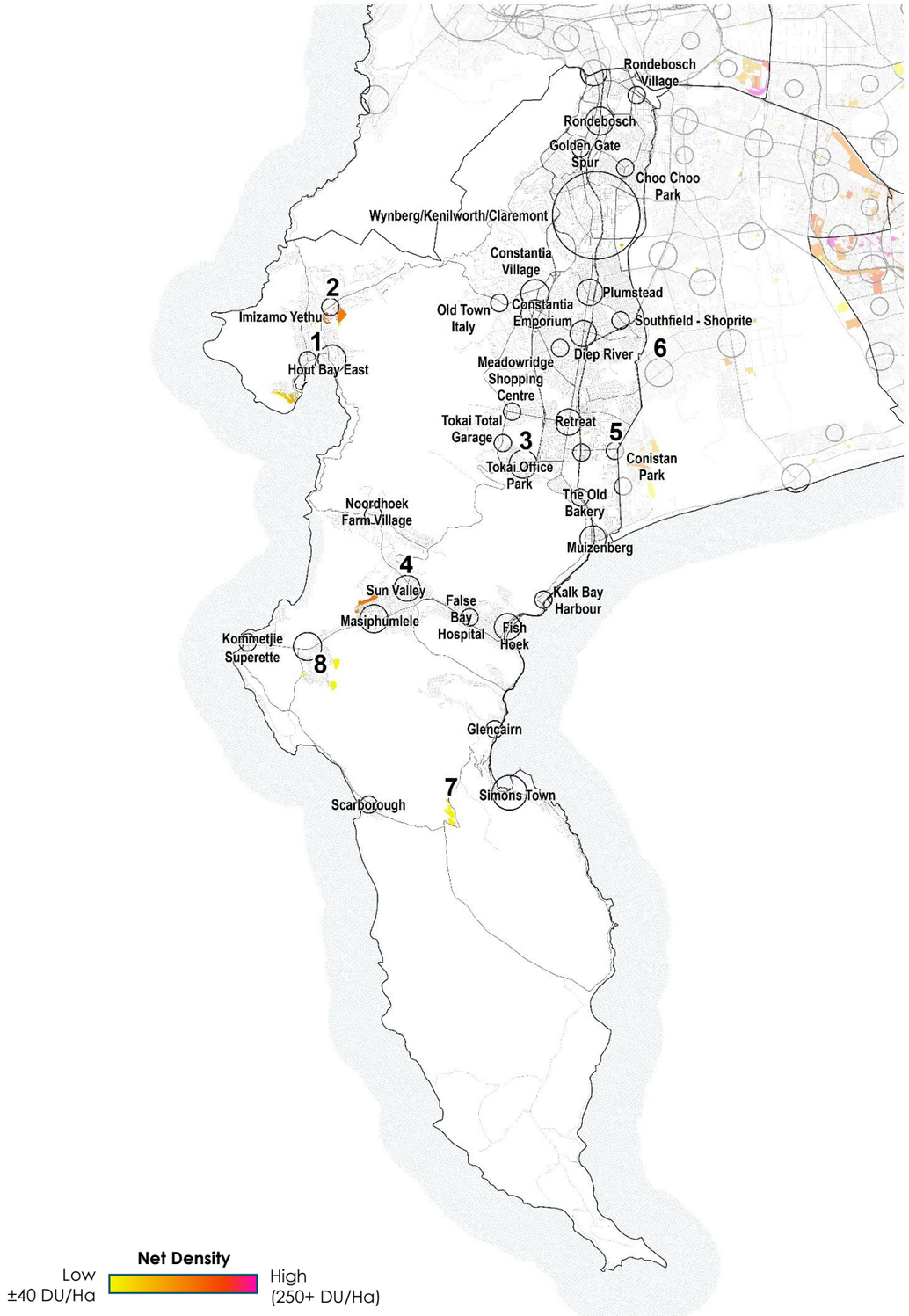
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows change in property valuation (formal properties) over time as captured in the City's General Valuation Rolls (2012, 2015, 2018).
Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

Data source: Human Settlements and Urban Planning and Design, City of Cape Town



Map D2-a Southern: Areas of Informality (2021)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

SPATIAL TREND (DISTRIBUTION/PATTERN)

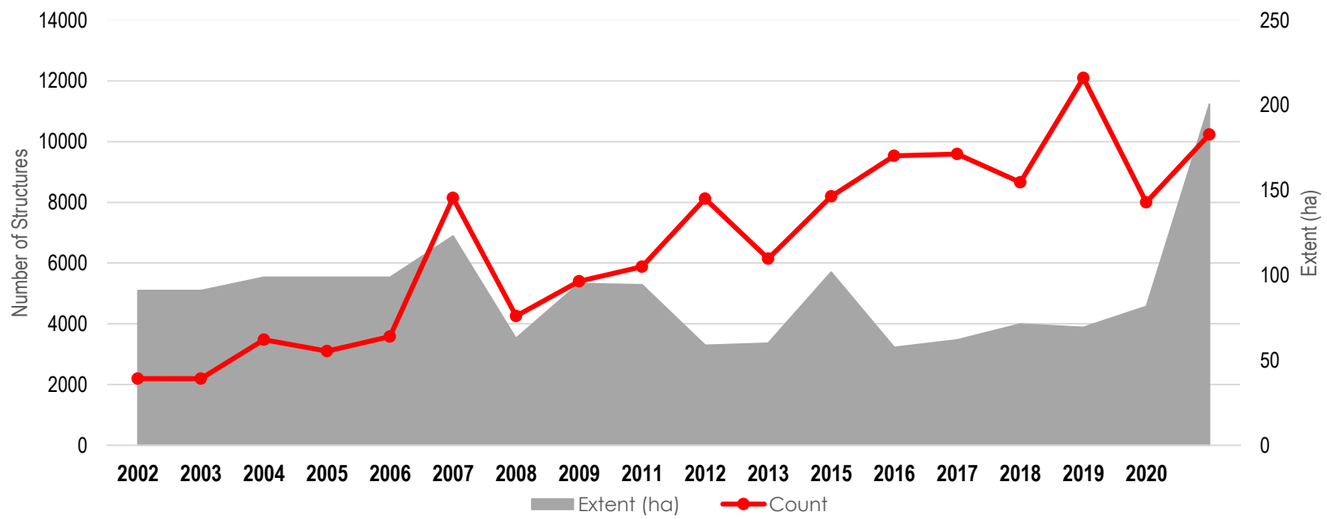
Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the major transport corridors. Informality has almost exclusively been contained to within the existing informal areas in the Southern District. As a result of the limited number of these areas (where significant informality exists), as well as their highly strategic locations in relation to work and other opportunities, they include some of the highest densities in the district. Despite this, pressure of further growth continues, and the number of structures in these areas has generally continued to slowly rise – both in the formal township areas and also in slowly expanding adjacent informal settlements.

This is resulting in increasingly stressed urban environments (regarding infrastructure capacities, environmental degradation, etc.). Allied to substantial additional pressure by adjacent suburban communities and associated activists and supporters, these require focused additional assistance and coordination of efforts by the responsible authorities.

LOCAL LEVEL TRENDS

The section below highlights the areas where informality was observed within the district:

1. Hangberg
2. Imizamo Yethu
3. Westlake
4. Masiphumelele
5. Steenberg
6. Retreat
7. Boys Town - informal settlement development has consolidated
8. Erf 5144 Ocean View - informal settlement development has consolidated



Graph D2-a Southern: Number of informal structures per year, excluding areas of unlawful land occupation

D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (METRO-WIDE)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2021).

Data source: Human Settlements and Urban Planning and Design, City of Cape Town

KEY TAKE-AWAY TRENDS:

- Areas of informality display a spatial pattern of clustering that is either **embedded in or in close proximity of areas of lower income**, with larger clusters forming along the N2, N1 and N7. Although the location of these clusters **remains fairly consistent, they may grow in size and density over time**.
- Informal areas may also disappear from the map **once formalised or relocated,** and new areas form elsewhere.
- Since 2019, **additional areas have been unlawfully occupied** but these are not shown on the map or included as recognised areas of informality at present.
- Areas of **informality include portions of land that are not suitable (safe) for residential development** or that are used for or intended to be used for other purposes/urban support functions. Examples of such land include core biodiversity areas, 1:100-year floodplains, airport noise contours, road and rail reserves, servitudes (e.g. power line servitudes), and landfill sites.

Map D2-a: **Varying location, extent and density of areas of informality (2002-2021).**

Graph D2-a: **Number of informal structures per year, excluding areas of unlawful land occupation.**

E : CASE STUDIES

1a : Woodstock and Salt River
1b : Blaauwberg Road
1c : Metro Souteast

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

E.
1a

CASE STUDIES

WOODSTOCK & SALT RIVER

The Woodstock and Salt River area saw the highest increases in residential values across the city for the period with average values increasing by over 200% (see indicator C8).

Over the past decade, the Woodstock and Salt River areas have undergone substantial market-led regeneration and have seen significant development and investment within the area. Redevelopment has been stimulated by increased demand for residential property in the CBD and the surrounding areas, interest from creative industries; along with the UDZ incentive.

Significant residential bulk has been added to the area in the last few years, the majority of which has occurred towards the CBD along the Victoria and Albert Road corridors. This development has been predominantly high-end apartment units often in the form of large-scale mixed-use developments, which include a range of uses besides the residential, including street-front retail and office.

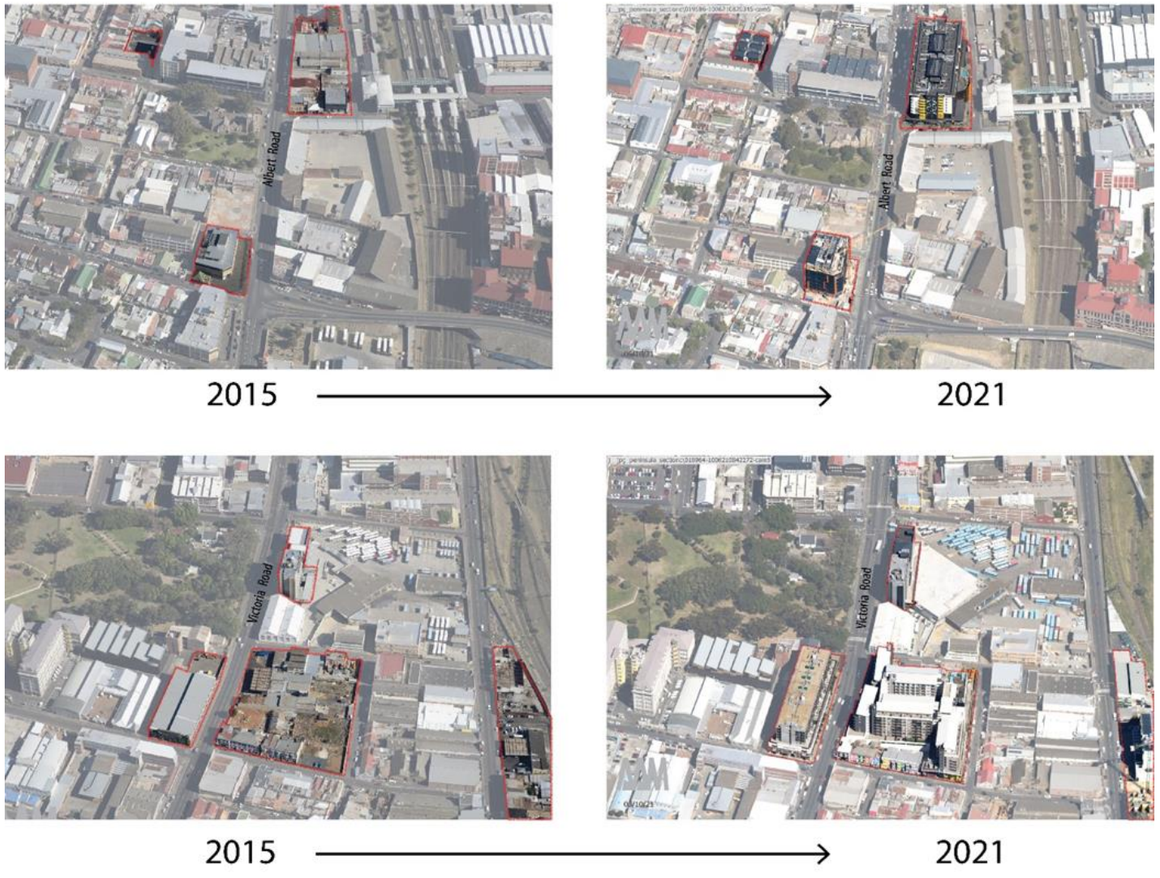


Figure 1: Conversion of properties along corridors in Woodstock



Figure 2: Conversion of properties to large-scale, mixed use developments

However, there has also been substantial smaller to medium scale densification throughout the study area. The data also shows particularly high increases in value in the historic residential fabric of Woodstock. This is likely due to the renovation and upgrading of existing heritage building stock.

This development and investment in the area has led to significant increases in property prices and rates, which poses a threat to communities who have lived in the area for generations. The gentrification displacement effect is exacerbated by lack of land tenure due to generational and informal rental agreements.

Public sector investment and planning in the area haves focused on opportunities for transformation, including a drive for inclusionary housing. Currently, the following projects are under way; Pine Road social housing; Dillion Lane social housing; New Market Street social housing; Salt River Market. Several private developers have voluntarily included inclusionary units under pressure from community and advocacy groups. For instance, Wex 2, a 72-unit development, has included 10 affordable units (15% of the residential component).

E.
1b

CASE STUDIES

BLAAUWBERG ROAD

Properties along Blaauwberg Road saw significant increases (100% and more) in values over the past three valuation terms, and had some of the highest changes in residential density (see indicators C3 and C8).
Historically (over the past 12 years) there has been a growing trend to further intensify existing residential land uses from single residential development to flats, and to convert existing single residential properties to commercial uses (predominantly passer-by trade) – see figures 2 and 3. While existing policy support redevelopment and changes in land use to higher density and diversity of development, the change along Blaauwberg Road has occurred in piecemeal fashion. This is apparent in the high number of contravening small-scale businesses along its length, and the number of rezoning, temporary departure, removal of title deed restrictions and consent use applications made to the local district office for flats and commercial land uses (see figure 4).



Figure 1: Zoning along Blaauwberg Road (TOD Strategic Framework, 2016)

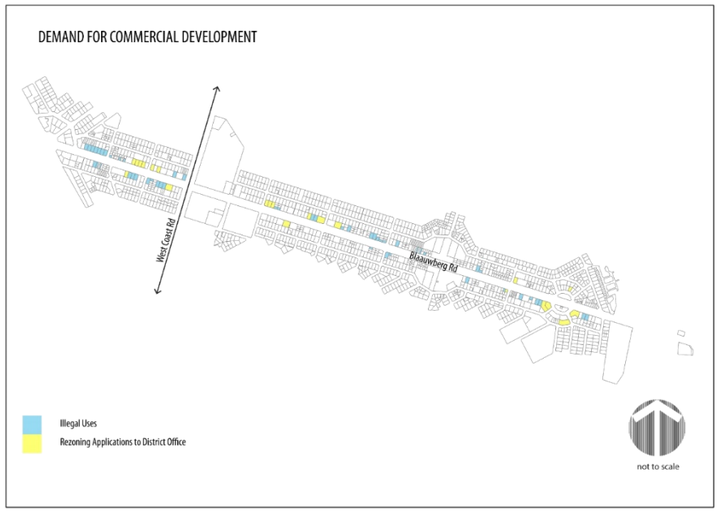


Figure 4: Contravening land uses and rezoning applications (TOD Strategic Framework, 2016)

The reason for the changes in land use and associated property value can be correlated to the following factors:

- Increased residential development in the immediate surrounds and local area could have led to an increased demand for commercial services hence the conversion and redevelopment to small-scale offices and services.
- Exposure of properties to Blaauwberg Road, a development corridor with high levels of accessibility, creates high potential for passer-by trade which has resulted in many properties' uses changing from residential to small-scale commercial. The MyCiTi BRT public transport investment implemented along Blaauwberg Road in 2012 could be considered a catalyst for further intensification of existing residential land uses and conversion to a greater mix of land uses. Furthermore it provides access to high quality public transport, which improves the overall attractiveness/marketability of the area.
- New policy in 2012 (Blaauwberg District Plan) and 2016 (TOD Strategic Framework) which supported an increase in residential density and mixed use development

While appropriate forms and types of redevelopment are supported by policy (some of which is shown in figures 2 and 3), it is not translating into practice. The piecemeal nature of development is considered undesirable as it perpetuates low density and a fragmented built fabric, and while there is a demand to develop in accordance with policy, there remain barriers to the desired form of urban development, for example:

- Restrictive title deed conditions in respect of residential properties along the full length of Blaauwberg Road;
- Onerous access spacing requirements imposed by the Western Cape Road Access Guidelines (2002);
- Insufficient sanitation infrastructure capacity of the Potsdam wastewater treatment works to support further development in the Blaauwberg district.



Figure 2: Conversion from residential to commercial along Blaauwberg Road.

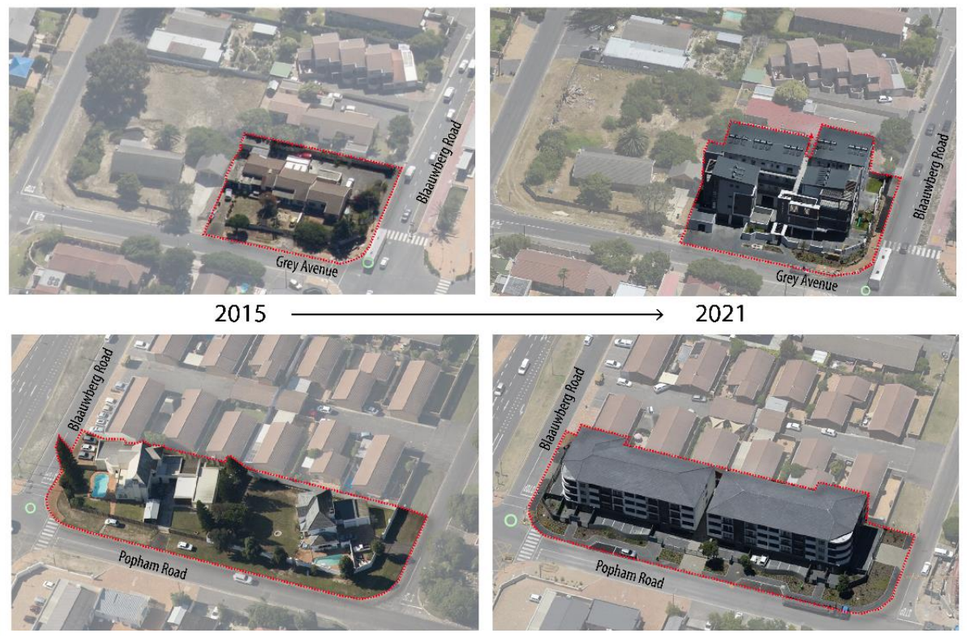


Figure 3: Conversion from single residential to flats along Blaauwberg Road

E.
1c

CASE STUDIES

METRO-SOUTHEAST

Residential land use in the Metro-Southeast is primarily characterised by informal and formal dwellings with more than a single dwelling on a site. The largest portion of the Philippi and Khayelitsha area falls within the zoning category "Single Residential Zone 2: Incremental housing" (SR2). The SR2 zoning "facilitates upgrading and incremental housing from an informal settlement to a formal settlement". SR2 may apply to individual land units or to blocks containing an informal settlement. The Metro-Southeast showed some of the highest changes in residential density in the city (see indicator C3). Significant investment in government subsidised housing projects between 2013 and 2022 also appears to have contributed to the incremental upgrading of informal to formal residential dwellings, and the increasing property value reflected in the area (see indicator C8).

Residential value change between 2012 and 2018 is significantly pronounced within sections of the Metro-South East, based on the Valuation roll data. A high percentage value change is especially noteworthy in sections of Philippi (between Sheffield Road and the R300) and Khayelitsha (most southern section) in the metro south in areas that are in close proximity to public transport.



Figure 1: Conversion of single residential dwellings (Metro-Southeast)

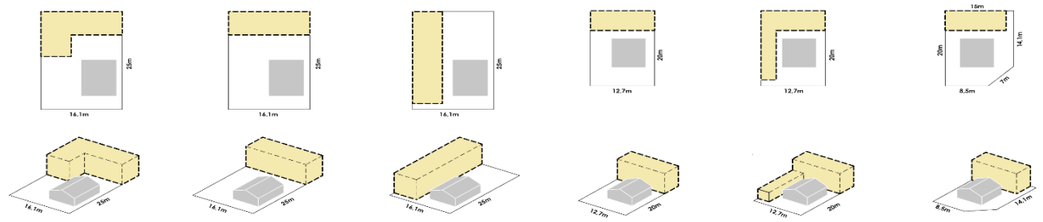


Figure 2: Small-scale rental unit typologies

Simultaneously, the conversion of single dwelling government-subsidised properties (GSP) to larger and additional dwellings or blocks of flats, in the form of homeowner or micro development is evident (see figures 1 and 2).

The Cape Town Housing Market Report (2020) of the Centre for Affordable Housing Finance in Africa (CAHF) indicates that GSP accounted for a significant portion of affordable housing stock in Cape Town in 2019. 87% of houses valued under R300 000 (entry market), and 41% of houses in the affordable segment (R300 000 to R600 000) have been subsidised by the government. According to the report, this GSP played a critical role in the entry and affordable markets, particularly for resale, as both segments serve an important 'gap market', including for the working class. GSP properties also accounted for 33%-44% of new registrations between 2015 and 2019. In 2019, of the 9 187 new transactions recorded in the City of Cape Town, 33% or 3 087 were government-subsidised properties.

Between 2009 and 2018, the highest number of residential property sales transactions in the Metro Southeast was in Philippi, based on the City's Valuation Roll data. However, residential property prices within Philippi are generally on the lowest end of the spectrum. This reflects the high demand for housing in the area by households in the entry and gap market.

The abovementioned trends in property market transactions in the Metro Southeast is primarily based on Deeds Registry data. This does not reflect the full extent of homeowner and micro-development, which has become more evident in areas previously developed as government-subsidised properties where unregularised development and title deed and transfer challenges related to GSP remain commonplace and contribute to irregular transactions. In addition, very few of these small-scale affordable rental units have planning permission and fewer are being developed in terms of the National Building Regulations.

However, there is recognition for the role of homeowners, emerging contractors and micro-developers as partners in providing housing in the affordable market segment as it contributes to addressing the housing backlog in Cape Town.

The City is currently investigating future processes and mechanisms to facilitate this type of development in a safe and sustainable manner.

PART 2: IMPLEMENTATION TRACKING REPORT

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

F : PUBLIC INVESTMENT

ALIGNMENT OF PUBLIC INVESTMENT TO SPATIAL VISION

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

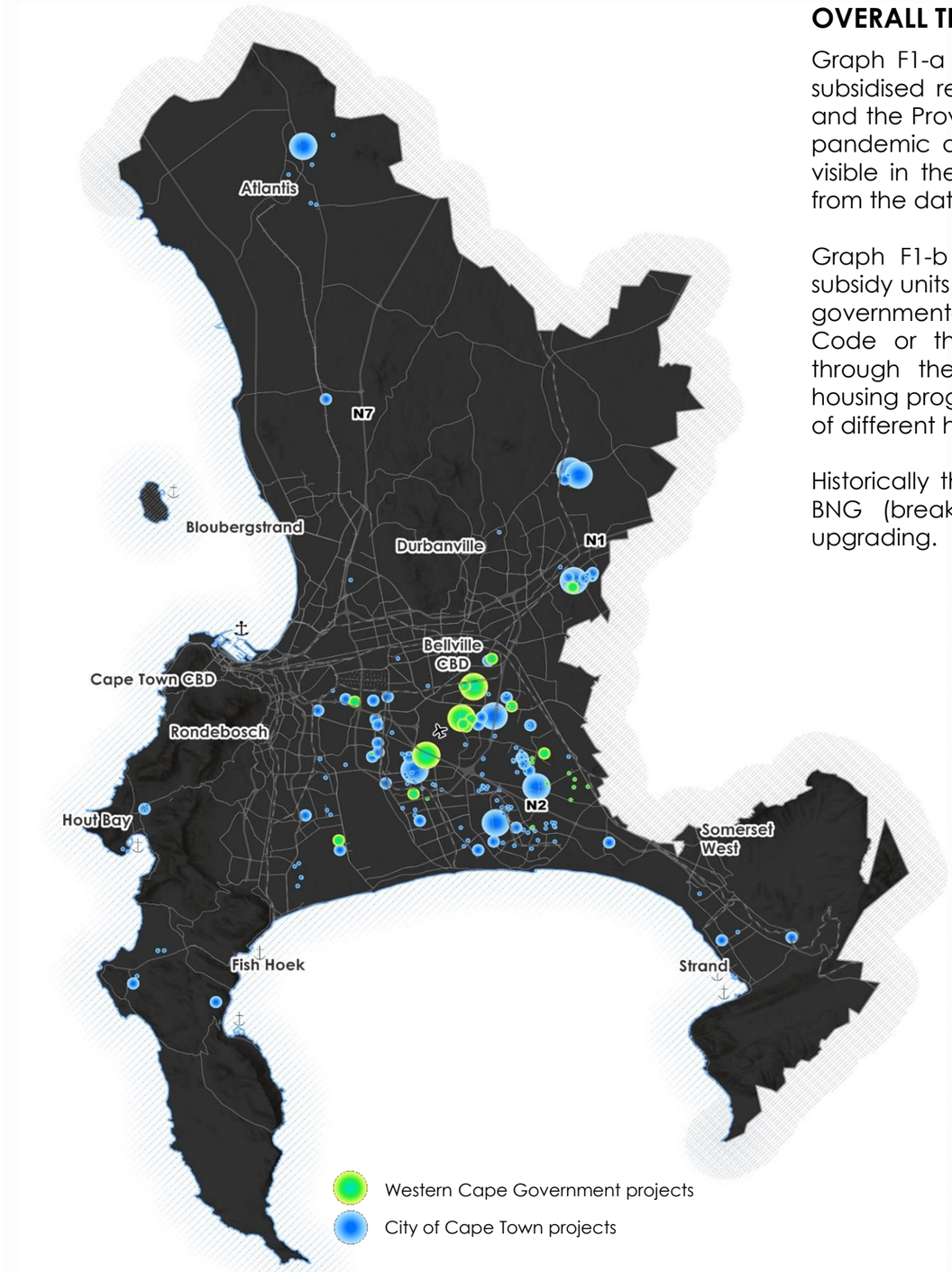
F.1

PUBLIC INVESTMENT

GOVERNMENT-SUBSIDISED HOUSING

This indicator shows the delivery of government-subsidised housing over the period 2013-2022/2023 as constructed by the City's and the Western Cape Provincial Government's Human Settlements departments.

Data Source: WCG&CCT Human Settlements Projects (2013-2022)



Map F1-a: Government-assisted housing completed (2013-2022/Q3 2023)
Source: City of Cape Town and Provincial Departments of Human Settlements

OVERALL TREND

Graph F1-a indicates that the City provided in excess of 4 000 state-subsidised residential units per annum between 2013/14 and 2020/21, and the Province provided less than 4000 per annum. The impact of the pandemic and land invasions (on government-owned land), is clearly visible in the significant drop in the units completed in 2022/23 (apart from the data not representing a full year).

Graph F1-b provides a breakdown of the proportions and types of subsidy units completed over the past decade. The nature and scope of government-subsidised units fundamentally depends on the Housing Code or the financing system employed by the National Treasury through the National Department of Human Settlements, as these housing programmes are adjusted over time based on the specifications of different housing grants supporting the projects.

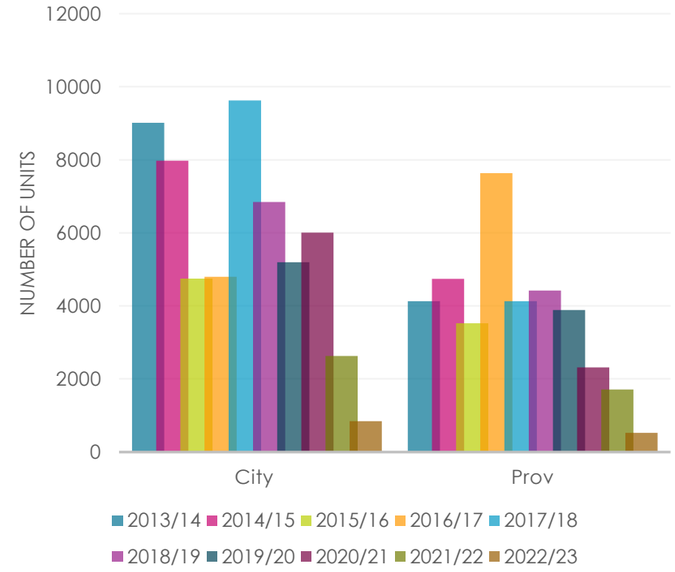
Historically the majority of state subsidised units were in the categories BNG (breaking new ground) and incremental informal settlement upgrading.

SPATIAL TREND (PATTERN/DISTRIBUTION)

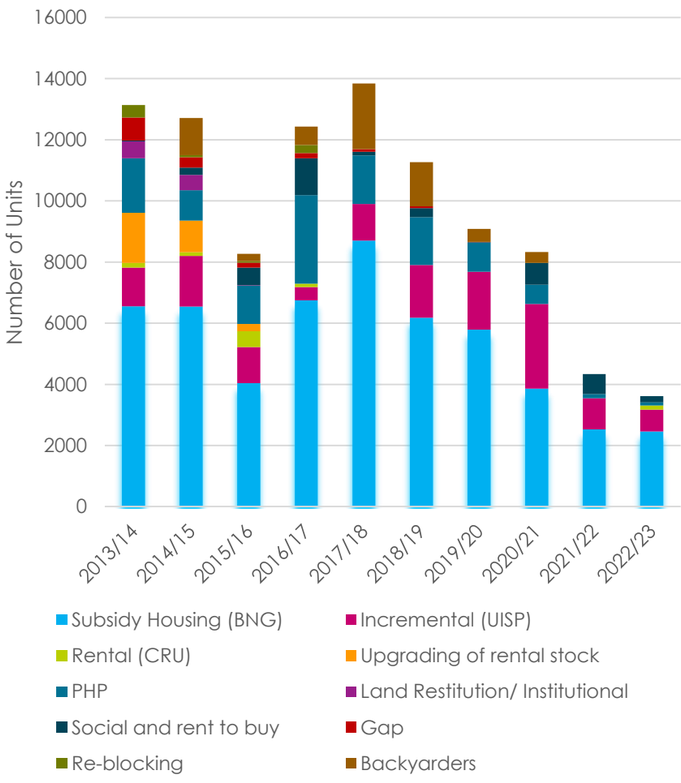
Map F1-a illustrates the concentrations and relative size of the human settlements projects cumulatively over the past decade. This includes all sites and top structures added together as residential opportunities. Most of the projects were located in the Metro Southeast part of the city closest to the highest residential densities (and needs) – refer to indicator C3. This pattern is the opposite as observed in the provision by the multi-residential units (flats) as provided by the private sector, generally bonded by commercial bank loans, which are reflected as indicator C6 and located in the northeastern and northwestern locations on the periphery of the built-up footprint.

Most of the provincial projects were located in Delft, Belhar and some in Wallacedene/Bloekombos (northeast), while the City's largest projects can be seen in Blue Down, Mfuleni Scottsdene/ Wallacedene and new developments in Fisantekraal.

Compared with indicator C7, very few formally registered property (re)sale transactions were concluded since 2013/14 in the Metro Southeast, even though this location reflects the concentration of state-provided residential units. It is possible that many property transactions do not happen in the formal market, and, therefore, it does not trigger formal valuation processes and does not appear as Deeds Office transfers.



Graph F1-a: Number of state-provided residential units.



Graph F1-b: Types of housing opportunities completed

F.1

PUBLIC INVESTMENT

GOVERNMENT-SUBSIDISED HOUSING

This indicator shows the delivery of government-subsidised housing over the period 2013-2022/2023 as constructed by the City's and the Western Cape Provincial Government's Human Settlements Departments.

Data Source: WCG&CCT Human Settlements Projects (2013-2022)

KEY TAKE-AWAY TRENDS:

- Provision of government subsidised residential opportunities are rapidly decreasing (through key providers being the City and the provincial Human Settlement's Department). This is for all residential typologies excluding PHP (People's Housing Projects, self built).
  - The City's provision decreased from above 6 000 sites and top structures combined in years such as 2013-15 as well as 2017-18, to around 5 000 opportunities per year in 2015-17 and 2019-20.
  - A steep decrease reflects around 3 000 opportunities in 2022 and possibly in 2023.
  - Provincial provision was around 4 000 units per year for all years except 2016/17, which decreased to below 2 000 since 2020.
- Decreases are a result of pipelined human settlement land parcels being invaded and occupied during the Covid-19 period, without approval.
- Brick and mortar BNG houses were the largest part of the portfolio about 5 and 10 years ago and is still in 2021-2023.
- Geographically the government subsidised residential opportunities are located **close to the highest densities** and most needy areas of the city.

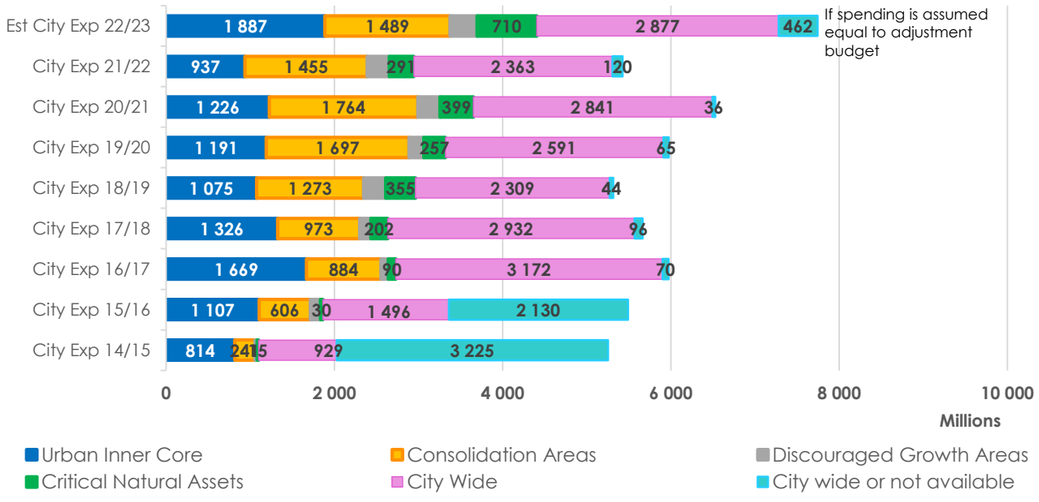
F.2

PUBLIC INVESTMENT

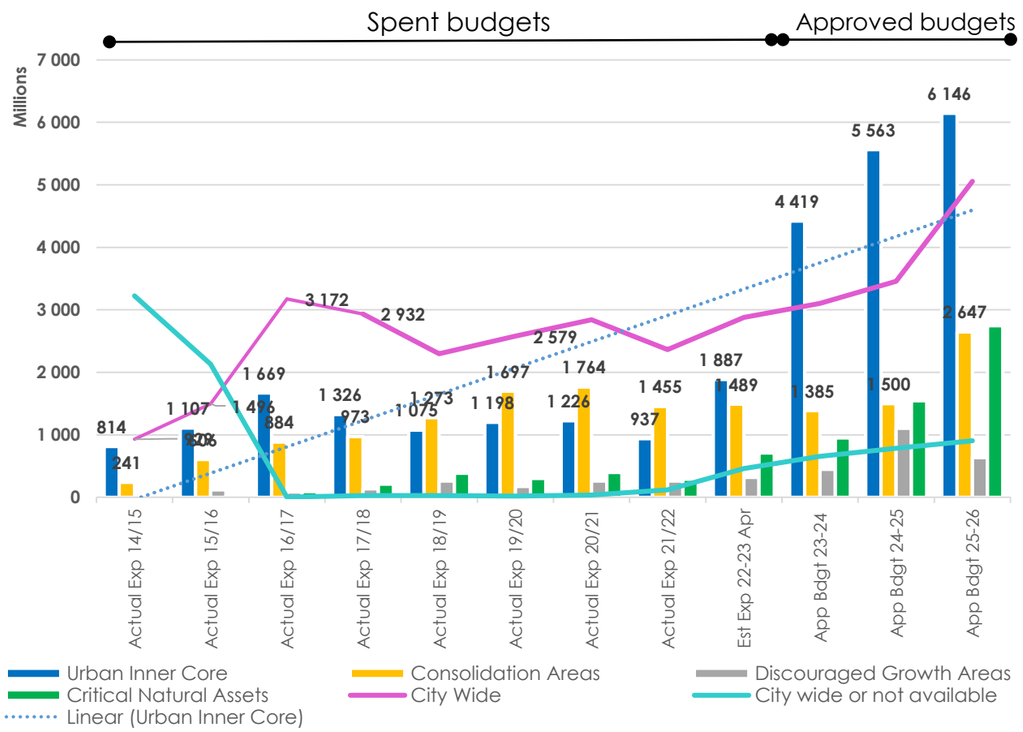
CAPITAL EXPENDITURE: CITY PROJECTS

This indicator shows the location of annual completed capital projects by the City of Cape Town (CCT). It is reflected in the different investment targeted areas in the city, as consolidated in the MSDF (Municipal Spatial Development Framework). This includes four spatial transformation areas (STAs): the urban inner core (UIC), the incremental growth and consolidation area (IGCA), the discouraged growth area (DGA) and critical natural assets (CNAs) areas. Only City of Cape Town projects > R10m are reflected on maps. The tables reflect the top 10 most expensive projects implemented per year.

Data Source: City of Cape Town SAP PPM (2015/16-2022/23)



Graph F2-a: City of Cape Town capital expenditure 2014/15-2021/22 (as at June 23) per MSDF Spatial Transformation Area (2022/23 estimated as equal to budget)



Graph F2-b: City Capital expenditure 2014/15-21/22 and approved budgets 2023/24-25/26 (as at June 23)

OVERALL TREND

Expenditure on capital projects illustrates the location of completed investment by the City. These budgets reflect that the municipality's capital project locations broadly align with the spatially targeted areas (STAs) in the City's MSDF. There has been a steady increase in the expenditure on capital projects from just over R5b in 2014/15 to under R6b in 2021/22. It is estimated that expenditure will increase to around R7,7b in June 2023 (graph F2-a). Spatial mapping of the precise location of capital expenditure in the C3PM system commenced in 2015.

The largest group of projects is still classified as those benefiting the Cape Town municipal area at large (indicated as 'citywide' benefits on graph F2-a). These include projects such as waterpipe and meter replacements; sewer pump station upgrades and pipe replacements; road upgrades; informal settlement upgrades including sanitation; vehicle replacements and technology improvements (IT, safety and security systems, disaster risk management, etc.). These citywide locations grew from just over R1b in 2014/15 to a threefold total of an estimated R3,4b in 2022/23.

Capital expenditure in the critical natural assets were not clearly visible in 2014/15, but is estimated to significantly increase to R710m in the current financial year (graph F2-a). Ongoing system improvement reduced the value of projects classified as not spatially defined ('citywide or not available') since 2014/15 to a minimum in 2020/21. The increase in the current year relates to large informal settlement budgets for reblocking.

SPATIAL TREND (DISTRIBUTION/PATTERN)

Projects located in the UIC and the GCAs aim to provide improved services to the areas where the majority of the citizens are currently residing (refer to residential density map). These areas are also the intended focus on the largest component of incremental densification and densification along transport corridors. Although there was an anticipated increase in the potential spending by the City in all of the STAs, especially in the UCI and GCA, increasing from around 43% (R2.55b) of all spending in 2016/17 to 48% (R2.89b) in 2020/21 and beyond, the trend is affected by the location of key bulk infrastructure upgrading projects in the current and future years. Signs of that is already visible with an increase in the DGA and CNA spending. This increase can be ascribed to the fact that large bulk engineering services network improvements at the waste water treatment works and bulk water regional distribution pipelines, are mostly located in or surrounded by these areas. A second factor causing this increase may be the City's current investments in improving security of nature reserves, biodiversity improvements and environmental protection.

On average about 50% of the City's historical capital budget spent, was always depicted as city-wide. These large project benefits are distributed across the whole municipal area and cannot be ascribed to the UIC, GCAs, DGA or the CNAs.

GENERAL ANALYSIS

Graph F2-b shows a steady increase in capital expenditure in the UIC and the GCAs. This is as an illustration of the focus on alignment with the MSDF. The trend line reflecting spent capital and anticipated spending in the UIC (with approved budgets for 2023/24 onwards), is substantially higher (two, three and four times as high) in the UIC than the historical expenditure between 2017/18-2021/22 (which was around R1b-R1,2b). Annual spending is generally less than budgets, but the City is working on expanding programme and supply chain management capacity to ensure that approved budgeted amounts (such as years 2023/24 and beyond) are spent rather than reduced at adjustment budget stage.

The same information depicted on this sheet is represented on the next sheet as capital expenditure per financial year. There is also a list of the top 10 capital items per year, with legends on the maps.

F.2

PUBLIC INVESTMENT

CAPITAL EXPENDITURE: CITY PROJECTS

This indicator shows the location of annual completed capital projects by the City of Cape Town (CCT). It is reflected in the different investment targeted areas in the city, as consolidated in the MSDF (Municipal Spatial Development Framework). This includes four spatial transformation areas (STAs): the urban inner core (UIC), the incremental growth and consolidation area (IGCA), the discouraged growth area (DGA) and critical natural assets (CNAs) areas. Only City of Cape Town projects > R10m are reflected on maps. The tables reflect the top 10 most expensive projects implemented per year.

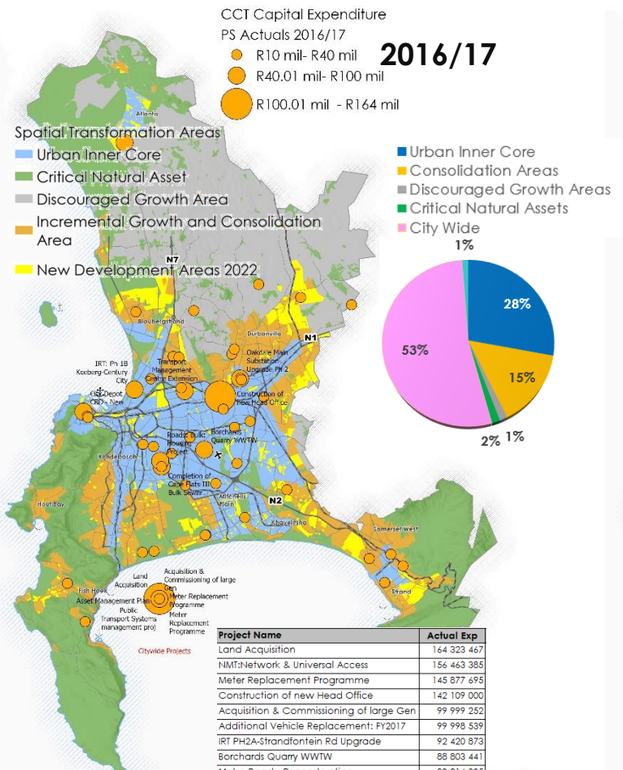
Data Source: City of Cape Town SAP PPM (2015/16-2022/23)

Map Series F2b-a: City capital expenditure 2015/16-2022/23

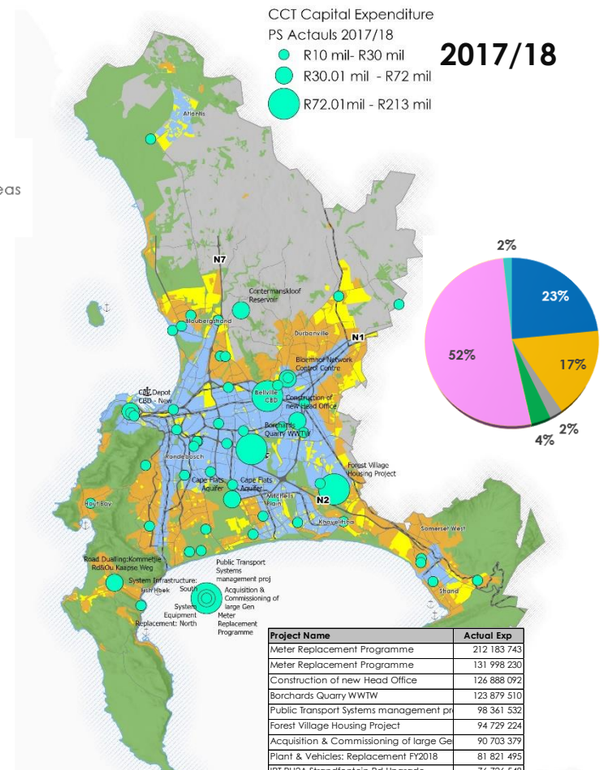
OVERALL TREND

The expenditure on capital projects located in or beneficial to the **UIC** has steadily decreased and is averaging around 22% of the value of the total annual capital expenditure since 2015/16. The current year (2022/23) appears to be on the rise again and this is a true reflection of the spatial targeting focus on the UIC. The investment in projects located in or benefiting the **IGCA** has steadily increased around threefold from 11%-115% (in 2015/16-2016/17) to almost 30% (in 2021/22) of the annual expenditure. Expenditure on projects benefiting the whole municipal area, and categorised as **city-wide** has more or less remained at just over 43% over the last seven years.

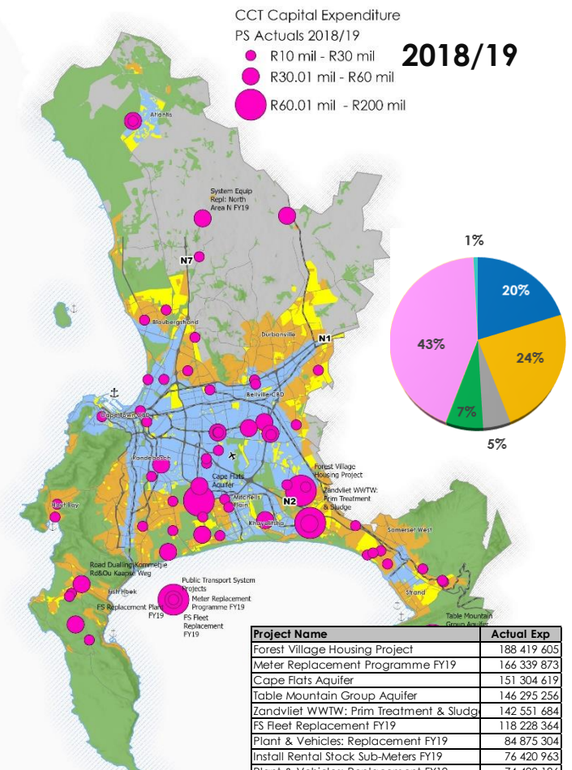
In almost all cases during the past seven financial years, the most expensive capital projects were related to bulk and systems engineering network upgrades (including water meter replacements), IRT, human settlement projects, fleet replacement and in two years, land acquisition. More recently, the engineering network projects such as WWTW upgrades dominated the human settlement projects in the top 10 per year. Since 2019/20, WWTW upgrade projects were the most costly single expenditure item.



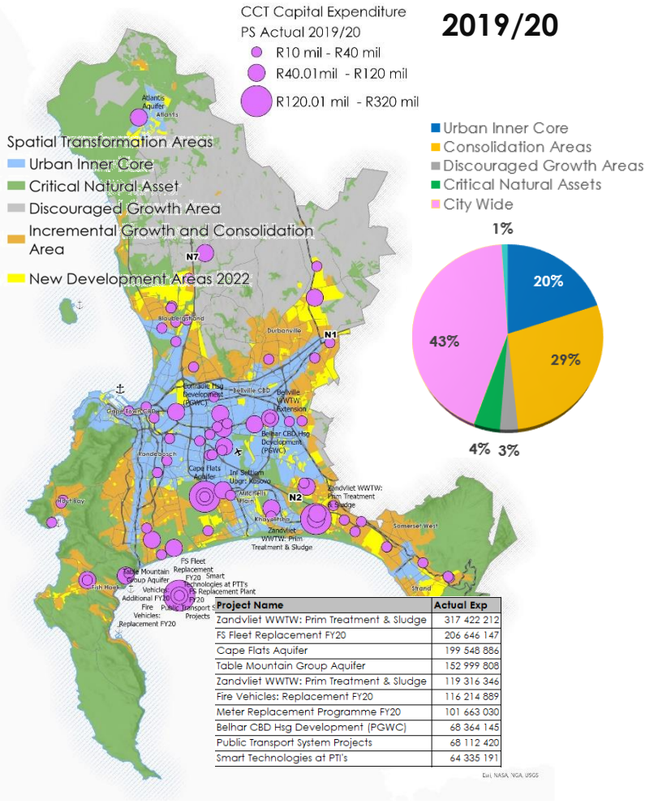
Project Name	Actual Exp
Land Acquisition	164 323 467
NMT:Network & Universal Access	156 463 385
Meter Replacement Programme	145 877 695
Construction of new Head Office	142 109 000
Acquisition & Commissioning of large Gen	99 999 252
Additional Vehicle Replacement: FY2017	99 998 539
IRT PH2A-Strandfontein Rd Upgrade	92 420 873
Borchards Quarry WWTW	88 803 441
Metro Roads: Reconstruction	83 214 335
Transport Management Centre Extension	82 824 154



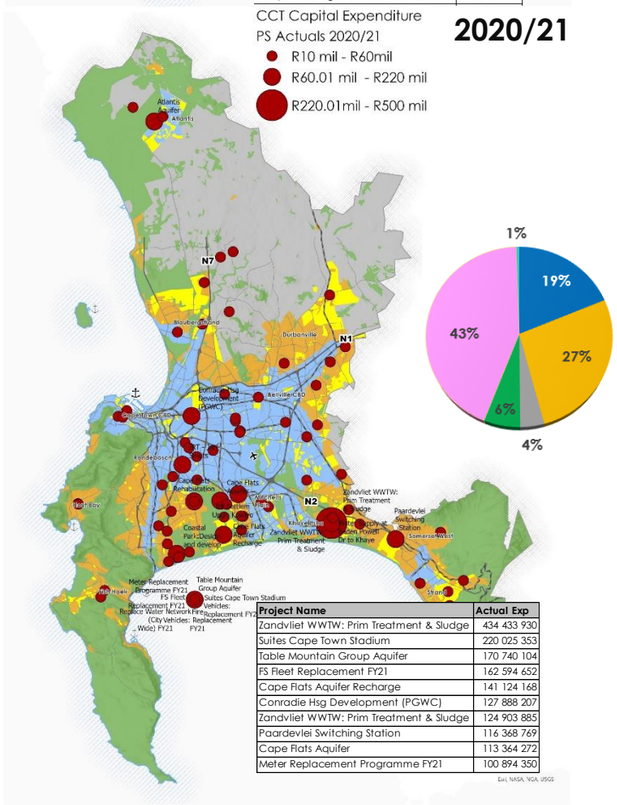
Project Name	Actual Exp
Meter Replacement Programme	212 183 743
Meter Replacement Programme	131 998 230
Construction of new Head Office	126 888 092
Borchards Quarry WWTW	123 879 510
Public Transport Systems management pr	98 361 532
Forest Village Housing Project	94 729 224
Acquisition & Commissioning of large Ge	90 703 379
Plant & Vehicles: Replacement FY2018	81 821 495
IRT PH2A-Strandfontein Rd Upgrade	76 726 548
Core, aggregation and local aggregatio	75 633 536



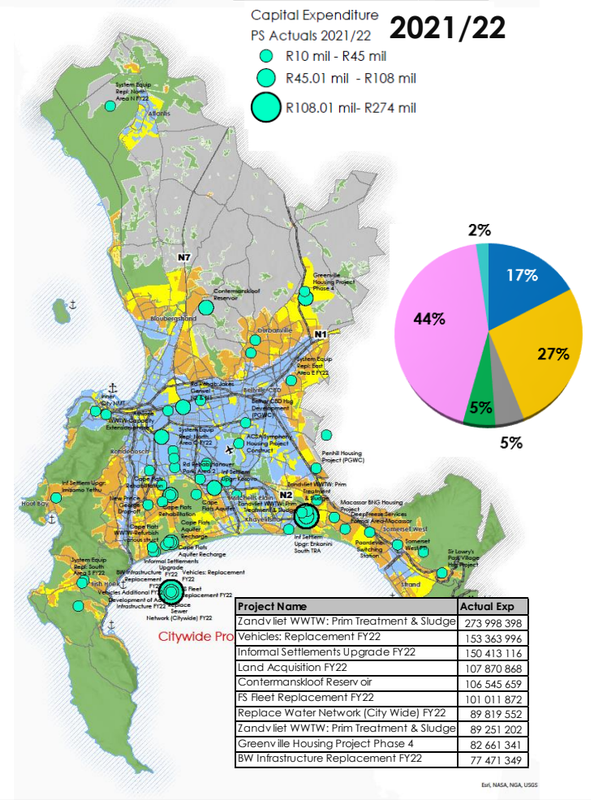
Project Name	Actual Exp
Forest Village Housing Project	188 419 605
Meter Replacement Programme FY19	166 339 873
Cape Flats Aquifer	151 304 619
Table Mountain Group Aquifer	146 295 256
Zandvliet WWTW: Prim Treatment & Sludg	142 551 684
FS Fleet Replacement FY19	118 228 364
Plant & Vehicles: Replacement FY19	84 875 304
Install Rental Stock Sub-Meters FY19	76 420 963
Plant & Vehicles: Replacement FY19	74 498 186
Public Transport System Projects	60 999 213



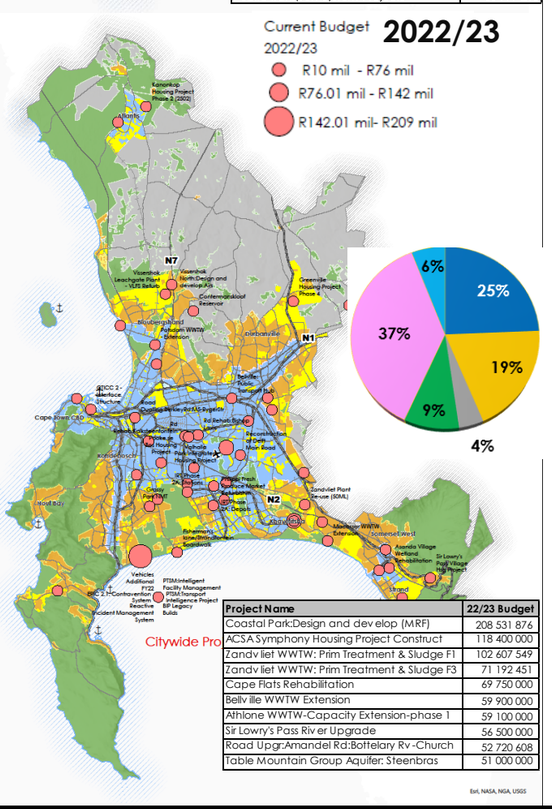
Project Name	Actual Exp
Zandvliet WWTW: Prim Treatment & Sludge	317 422 212
FS Fleet Replacement FY20	206 646 147
Cape Flats Aquifer	199 548 886
Table Mountain Group Aquifer	152 999 808
Zandvliet WWTW: Prim Treatment & Sludge	119 316 346
Fire Vehicles: Replacement FY20	116 214 889
Meter Replacement Programme FY20	101 663 030
Belhar CBD Hsg Development (PGWC)	68 364 145
Public Transport System Projects	68 112 420
Smart Technologies at PTI's	64 335 191



Project Name	Actual Exp
Zandvliet WWTW: Prim Treatment & Sludge	434 433 930
Suites Cape Town Stadium	220 025 353
Table Mountain Group Aquifer	170 740 104
FS Fleet Replacement FY21	162 594 652
Cape Flats Aquifer Recharge	141 124 168
Conradie Hsg Development (PGWC)	127 888 207
Zandvliet WWTW: Prim Treatment & Sludge	124 903 885
Paardevlei Switching Station	116 368 769
Cape Flats Aquifer	113 364 272
Meter Replacement Programme FY21	100 894 350



Project Name	Actual Exp
Zandvliet WWTW: Prim Treatment & Sludge	273 998 398
Vehicles: Replacement FY22	153 363 996
Informal Settlements Upgrade FY22	150 413 116
Land Acquisition FY22	107 870 868
Contermanskloof Reserv oir	106 545 659
FS Fleet Replacement FY22	101 011 872
Replace Water Network (City Wide) FY22	89 819 552
Zandvliet WWTW: Prim Treatment & Sludge	89 251 202
Greenville Housing Project Phase 4	82 661 341
BW Infrastructure Replacement FY22	77 471 349



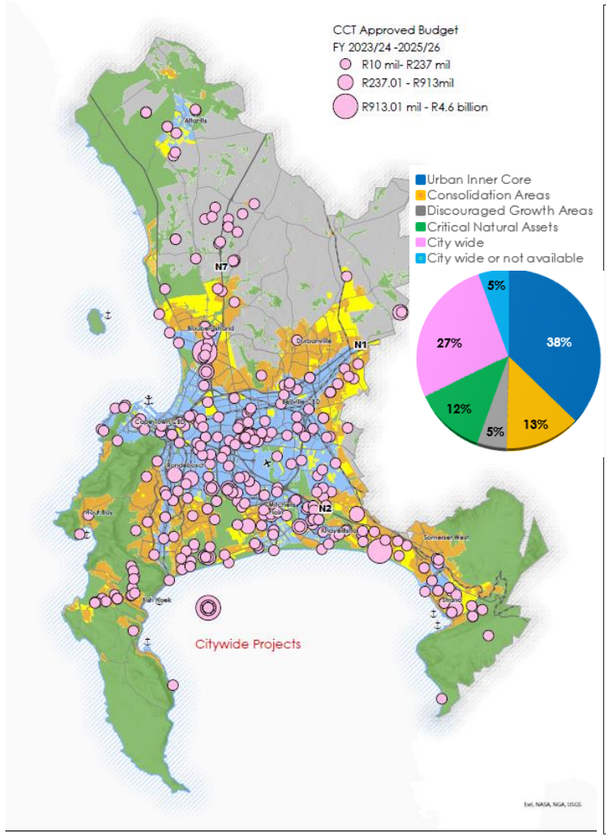
Project Name	22/23 Budget
Coastal Park:Design and dev elop (MRF)	208 531 876
ACSA Symphony Housing Project Construct	118 400 000
Zandv liet WWTW: Prim Treatment & Sludge FI	102 607 549
Zandv liet WWTW: Prim Treatment & Sludge F3	71 192 451
Cape Flats Rehabilitation	69 750 000
Bellv ille WWTW Extension	59 900 000
Athlone WWTW-Capacity Extension-phase 1	59 100 000
Sir Lowry's Pass Riv er Upgrade	56 500 000
Road Upgr:Amandel Rd:Bottelary Rv -Church	52 720 608
Table Mountain Group Aquifer: Steenbras	51 000 000

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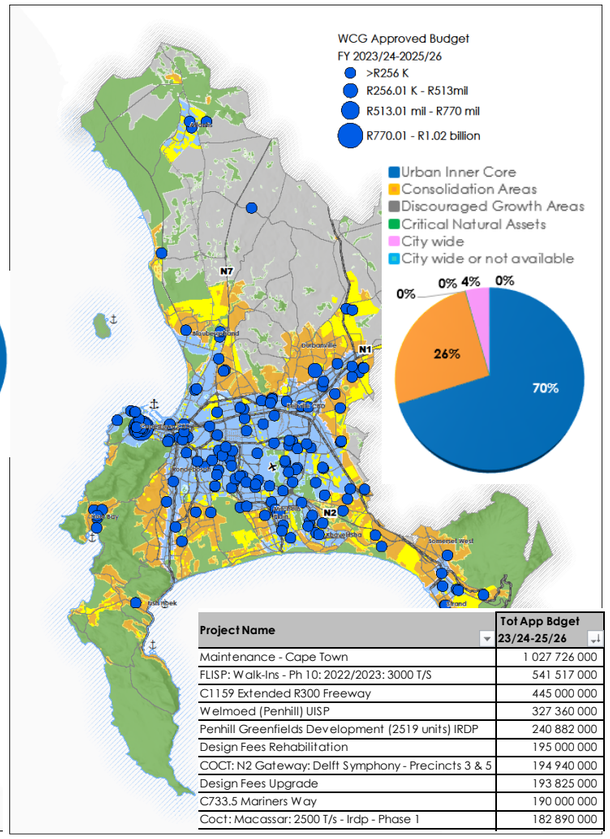
PUBLIC INVESTMENT: CITY & PROVINCIAL GOVERNMENT

CAPITAL BUDGET: CITY & PROVINCIAL PROJECTS

This indicator shows the focus of the approved three year capital project budgets by the City of Cape Town (CCT) and the Western Cape Government. It is reflected in the different investment targeted areas in the city, as consolidated in the MSDF (Municipal Spatial Development Framework). This includes four spatial transformation areas (STAs): the urban inner core (UIC), the incremental growth and consolidation area (IGCA), the discouraged growth area (DGA) and critical natural assets (CNAs) areas.



Map F2-b: City capital budget 2023/24-2025/26



Project Name	Tot App Bdget 23/24-25/26
Maintenance - Cape Town	1 027 726 000
FLISP: Walk-Ins - Ph 10: 2022/2023: 3000 T/S	541 517 000
C1159 Extended R300 Freeway	445 000 000
Welmoed (Penhill) UISP	327 360 000
Penhill Greenfields Development (2519 units) IRDP	240 882 000
Design Fees Rehabilitation	195 000 000
COCT: N2 Gateway: Delft Symphony - Precincts 3 & 5	194 940 000
Design Fees Upgrade	193 825 000
C733.5 Mariners Way	190 000 000
Coct: Macassar: 2500 T/s - Irdp - Phase 1	182 890 000

Map F2-c: Province capital budget 2023/24-2025/26

OVERALL TREND

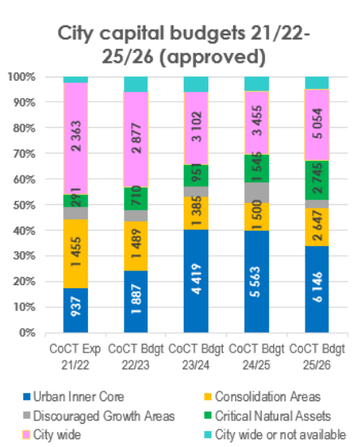
Anticipated and approved budgets for capital projects are an illustration of intended investment by role players such as the City as local authority and the Western Cape Government. These budgets reflect that government's intended capital project locations align with the spatially targeted areas of the City's MSDF (STAs). Approved investment by the local and provincial government over the medium term (2021/22-2025/26), is increasing (see graph F2-e) with the City spending four times more in the metropolitan area than Province.

For the City, the overall budget is increasing from around R6b in 2021/22 to R18b in 2025/26, while the provincial budget is increasing from R3,2b to around R4b (see graph F2-e). Although the provincial budget earmarked for the City of Cape Town areas was between 53% (2021/22), it is decreasing to around 20% (2025/26) of the City's own budget within the context of the City's massive expansion in infrastructure (R5b-R18b). The proportion intended to be spent in the **UIC** and **IGCAs** is more than the City's (graph F2-c vs graph F2-d, City 45%-54% vs Province 75- 80% of total annual budget per annum). Maps D2-b and D2-c depict the location of the City and provincial government's approved capital projects for the next three years.

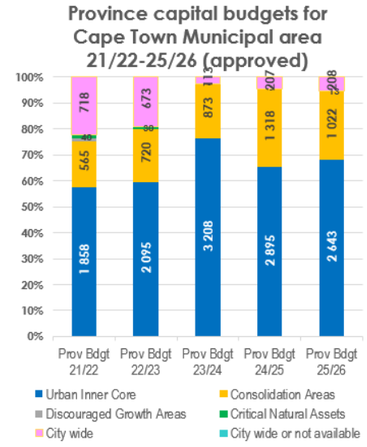
The City's capital budget contains a significantly larger number of projects than that of the Province. The City has double the number of large projects (>R10m in 2023/24-2025/26) than the Province (607 vs 191). Also for projects <R10m (over the three year period), the City has around 10 times more than the Province (2500 vs 189).

Maps D2-b and c indicate the proportion of the capital project values for the MTREF period to be spent in each of the STAs.

Some projects are also located in the areas where new development is anticipated (inside the urban development edge which is the line between the **IGCA** and the **DGA**, but outside the existing built-up footprint.



Graph F2-c: City capital budgets 2021/22-2025/26



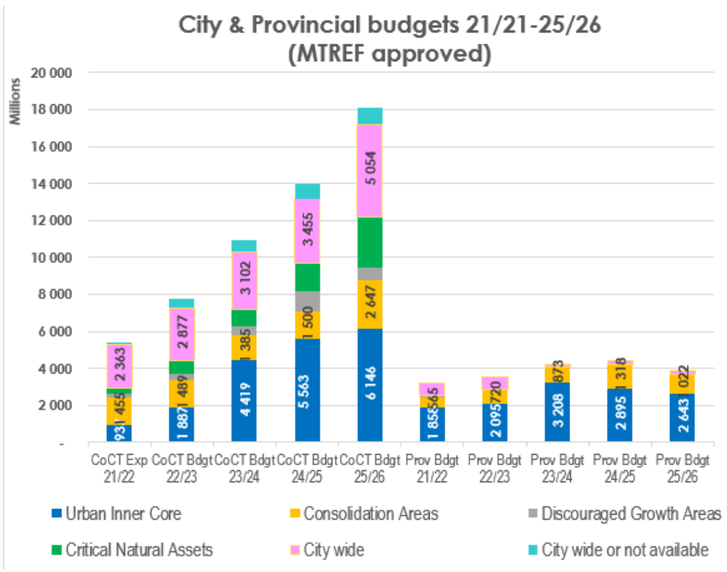
Graph F2-d: Province capital budgets 2021/22-2025/26

SPATIAL TREND (DISTRIBUTION/PATTERN)

There is an anticipated increase in the potential spending by the City in all of the STAs, especially in the **UCI**, **IGCA** and even the **CNAs** (see graphs D2-c and D2-e). Projects located in the **UIC** and the **IGCAs** reflect a focus to provide improved services to the areas where the majority of the citizens are currently located. The anticipated increase in the **CNAs** can be ascribed to the fact that large bulk engineering services network improvements at the waste water treatment works (WWTW), are mostly located in or surrounded by critical natural areas. Secondly because the City is investing in improving security of nature reserves, biodiversity improvements and environmental protection. The City's largest projects over the coming period include: multiple projects related to the implementation of the Integrated Rapid Transport Route between the Metro-Southeast and Wynberg/Claremont, as well as mega investments in WWTW upgrades. The Provincial budget has a strong focus on human settlement projects such as the Penhill/ Welmoed housing project's infrastructure installation, as well as key road construction and maintenance (such as the R300). Each amounts to >R250m over the next three years. Around 30% of the capital budgets of the City is always depicted as **city-wide** (graph F2-e) which implies the project benefits are distributed across the whole municipal area and cannot be ascribed to only the **UIC**, **IGCAs** or the **CNAs.** The slight increase in the **city-wide or not available** notation on the City's budget (graphs D2-c and D2-e), implies that the exact location of certain planned projects, is not yet available, as several locations are under investigation or affected by environmental impact assessment, feasibility studies or detailed design options being considered. The closer the budgets come to actual implementation, the more accurately project locations can be depicted in the different STAs.

GENERAL ANALYSIS

The maps show a high concentration of projects in locations such as the metro-south east corresponding with the highest concentration of residential units, population density and overall need for further investment to serve increasing needs of citizens (refer to other indicator sheets). Both the City and Province have a number of large projects that are of **city-wide** benefit and do not have specific locations (see dots located in the sea). These projects cover investments planned for the full jurisdiction area of the city and include: water meters and water pipe replacements, sewer pump stations upgrades and sewer pipe replacement, road upgrade, vehicle replacement, informal settlements upgrades including sanitation and technology improvements (IT, safety and security systems, disaster risk management, etc.).



Graph F2-e: City & Provincial budgets 2021/22-2025/26

F.2

PUBLIC INVESTMENT: CITY & PROVINCIAL GOVERNMENT

CAPITAL BUDGET: CITY & PROVINCIAL PROJECTS

This indicator shows the focus of the approved three year capital project budgets by the City of Cape Town (CCT) and the Western Cape Government. It is reflected in the different investment targeted areas in the city, as consolidated in the MSDF (Municipal Spatial Development Framework). This includes four spatial transformation areas (STAs): the urban inner core (UIC), the incremental growth and consolidation area (IGCA), the discouraged growth area (DGA) and critical natural assets (CNAs) areas.

KEY TAKE-AWAY TRENDS:

- Monitoring started in 2015 and since then **there has been an increase in the historical spending by the City in all of the STAs**, especially in the urban inner core (UIC) and/or the incremental growth and consolidation area (IGCA) and even the critical natural assets (CNAs) areas.
- The City's budget is about four times larger than the provincial budget for the municipal area.

Map F2-b: City c… 21/22-25/26

Map F2-c: Province capital budget 21/24-25/26

Penhill Greenfields Development (2519 units) IRDP	240 882 000
Design Fees Rehabilitation	195 000 000
COCT: N2 Gateway: Delft Symphony - Precincts 3 & 5	194 940 000
Design Fees Upgrade	193 825 000
C733.5 Mariners Way	190 000 000
Coct: Macassar: 2500 T/s - Irdp - Phase 1	182 890 000

OVERALL TREND

Anticipated and approved budgets for capital projects are an illustration of intended investment by role players such as the City as Local Authority and the Western Cape Provincial Government. These budgets reflect that government's intended capital project locations align with the spatially-targeted areas of the City's MSDF (STAs). Approved investment by the Local and Provincial government over the medium term (21/22-25/26), is increasing (see Graph F2-e) with the City spending 4 times more in the metropolitan area than Province.

For the City, the overall budget is increasing from around R6b in 21/22 to R18b in 25/26, while the Provincial budget is increasing from R3.2b to around R4b (see Graph F2-e). Although the Provincial budget earmarked for the City of Cape Town areas, was between 53% (21/22) it is decreasing to around 20% (25/26) of the City's own budget within the context of the City's massive expansion in infrastructure (R5b-R18b). The proportion intended to be spend in the **UIC** and **IGCAs** is more than the City (Graph F2-c vs Graph F2-d, City 45%-54% vs Province 75-80% of total annual budget per annum). Maps D2-b and D2-c depict the location of the City and Provincial Government's approved capital projects for the next 3 years.

…significantly larger number of projects than that … number of large projects (>R10m) in 23/24-… projects <R10m (over the 3 year period), the … Province (2300 vs 187).

Some projects are also located in the areas where new development is anticipated (inside the urban development edge which is the line … the existing built-up footprint.

Graph F2-c: City capital budgets 21/22-25/26

Graph F2-d: Province capital budgets 21/22-25/26

SPATIAL TREND (… ATTERN)

There is an anticipated … the potential spending by the City in all three STAs, especially in the **UIC**, **IGCAs** and even the **CNAs** (see Graphs D2-c and D2-e). Projects located in the **UIC** and the **IGCAs** reflect a focus to provide improved services to the areas where the majority of the citizens are currently located. The anticipated increase in the **CNAs** can be ascribed to the fact that large bulk engineering services network improvements at the Waste Water Treatment Works, are mostly located in or surrounded by critical natural areas. Secondly because the City is investing in improving security of nature reserves, biodiversity improvements and environmental protection. The City's largest projects over the coming period include: multiple projects related to the implementation of the Integrated Rapid Transport Route between the Metro-Southeast and Wynberg/Claremont, as well as mega investments in Waste Water Treatment Works upgrades. The Provincial budget has a strong focus on human settlement projects such as the Penhill/ Welmoed housing project's infrastructure installation, as well as key road construction and maintenance (like the R300), each amounts to >R250m over the next 3 years. Around 30% of the capital budgets of the City is always depicted as **city-wide** (Graph F2-e) which implies the project benefits are distributed across the whole municipal area and cannot be ascribed to only the **UIC**, **IGCAs** or the **CNAs.** The slight increase in the **city-wide or not available** notation on the City's budget (Graphs D2-c and D2-e), implies that the exact location of certain planned projects, is not yet available, as several locations are under investigation or affected by environmental impact assessment, feasibility studies or detailed design options being considered. The closer the budgets come to actual implementation, the more accurately project locations can be depicted in the different STAs.

GENERAL ANALYSIS

The maps show a high concentration of projects in locations such as the metro-south east corresponding with the highest concentration of residential units, population density and overall need for further investment to serve increasing needs of citizens (refer to other indicator sheets). Both the City and Province have a number of large projects which are of **city-wide** benefit and does not have specific locations (see dots located in the sea). These projects cover investments planned for the full jurisdiction area of the city and include: water meters and water pipe replacements, sewer pump stations upgrades and sewer pipe replacement, road upgrade, vehicle replacement, informal settlements upgrades including sanitation and technology improvements (IT, safety & security systems, disaster risk management, etc.).

Graph F2-e: City & Provincial budgets 21/22-25/26

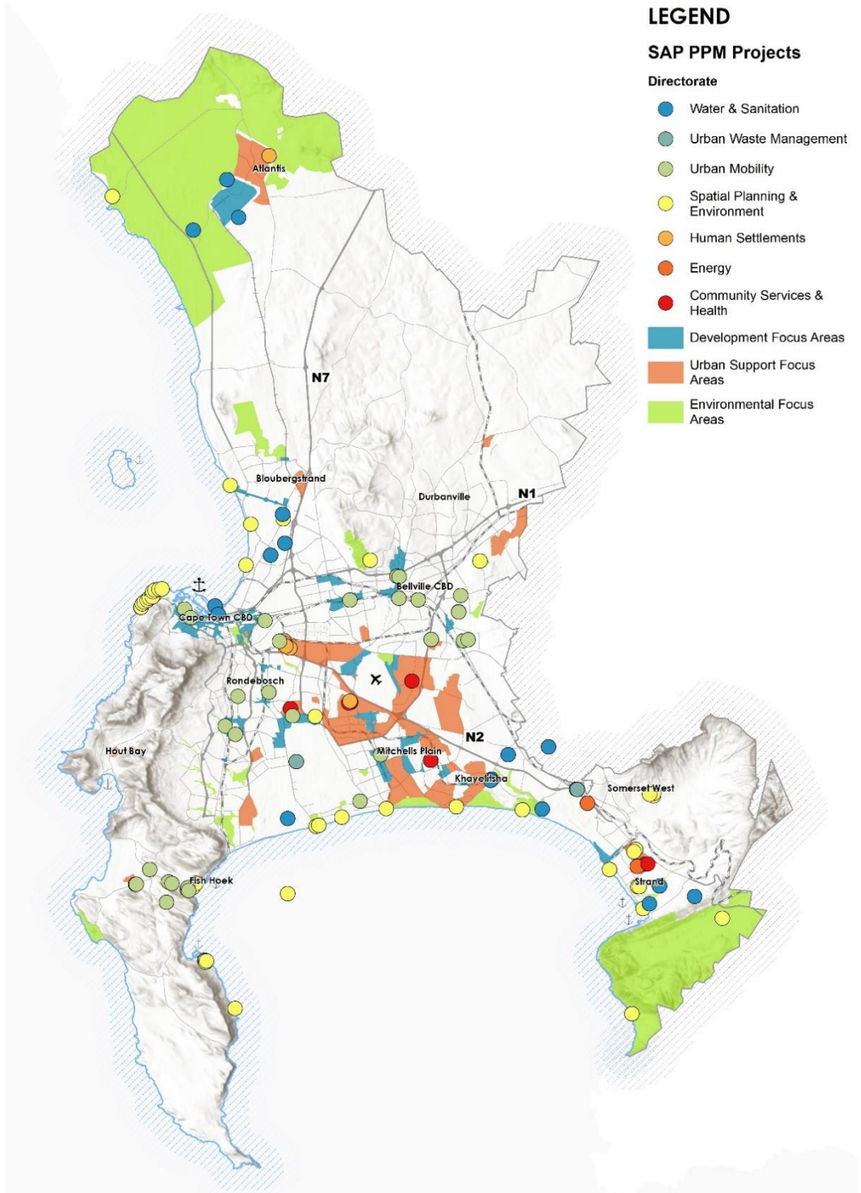
F.3

PUBLIC INVESTMENT

PROGRESS: URBAN RESTRUCTURING AND UPGRADING PROJECTS

This indicator monitors progress on projects identified and prioritised for urban restructuring and upgrading (present-2035) in the DSDF Implementation Plans, as well as showcasing bulk infrastructure investment projects per district.

Data source: SAP PPM; District Plan Vol. 3 2023



Map F3-a: SAP PPM Projects depicted by Directorate with PLFAs

PLFA	Count	Pct. within PLFA
EFA	18	15%
DFA	23	19%
USFA	17	14%
Outside PLFA	36	29%
Missing Information	30	24%

Table F3-a: project count and percentage of projects that fall under PLFAs

OVERVIEW

This panel monitors the progress of prioritised capital public investment projects identified for urban restructuring and upgrading in the eight approved DSDFs 2023. In total, 124 projects have been recommended for implementation by the various service delivery line departments in the City. The projects reported on consist of those that align with the Sector Plan priorities and are primarily located in the priority local facilitation areas (PLFAs) consisting of environmental focus areas, development focus areas and urban support focus areas. They do not represent the complete suite of the urban restructuring and upgrading projects identified in the DSDFs.

Map F3-a spatially depicts the locations of the projects, shows which directorates are leading each project, and indicates spatial aligned with PLFAs.

Table F3-a shows that the majority of projects fall within a PLFA.

Graph F3-a depicts start and end year of the projects, ranging from 2011 to 2035. Most projects are planned for completion between 2024 and 2027.

Figure F3-a depicts the number of projects in various stages of the development process. Projects are first grouped by directorate, then by project status.

Table F3-b shows the number and current status of projects in each stage gate. Apart from projects with no spatial location, most projects fall within the execution and scoping phases.

PROGRESS

The stage gate review process shows that 25% of projects are within the project preparation phase (between scoping and conceptual design), 5% of projects are in screening, and 47% of projects are within the project execution phase (between detailed design and benefits review). In 2024, four new projects are anticipated to start, while 16 projects are expected to be completed. Spatial Planning and Environment, Urban Mobility, and Water and Sanitation make up the directorates responsible for the largest share of projects in execution phase. Furthermore projects in conceptual design are predominantly made up of Spatial Planning and Environment and Urban Mobility directorates. Projects in the abovementioned phases include IRT Phase 2A projects, Potsdam WWTW, and Zandvliet WWTW. 23 Projects proposed by the DSDF do not have CPX numbers, thus have not been initiated.

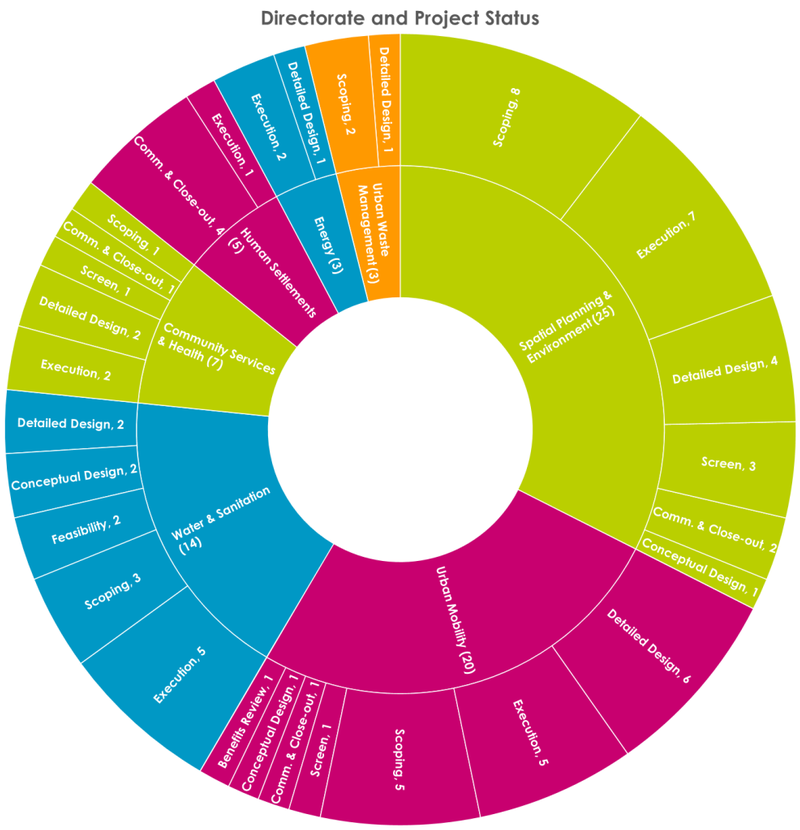
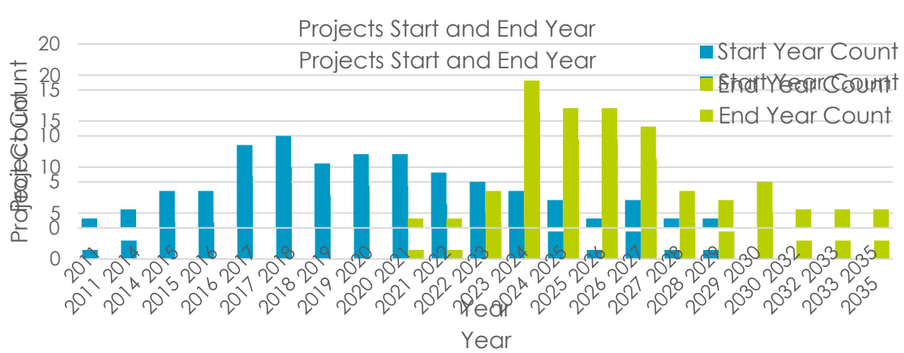


Figure F3-a: Sunburst diagram showing capital Investment Prioritisation Projects per Sector and Status



Graph F3-a: Count of start and end year projects listed in SAP PPM dataset

Current status	Count	Pct.
Scoping	19	15%
Feasibility	2	2%
Conceptual design	4	3%
Screen	5	4%
Detailed design	16	13%
Execution	22	18%
Commission and close-out	8	6%
Benefits review	1	1%
Not initiated	23	19%
Missing information	24	19%

Table F3-b: Current status and project count

F.3

PUBLIC INVESTMENT

PROGRESS: URBAN RESTRUCTURING AND UPGRADING PROJECTS

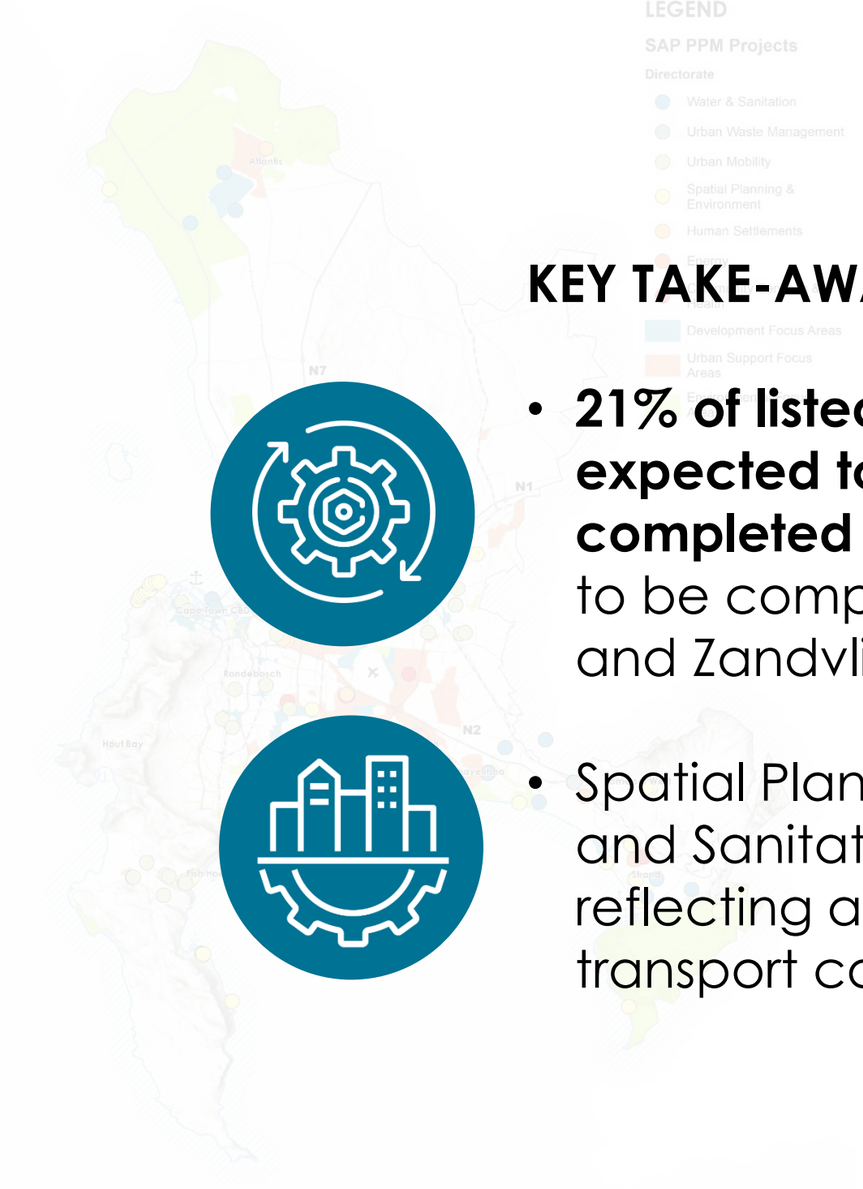
This indicator monitors progress on projects identified and prioritised for urban restructuring and upgrading (present-2035) in the DSDF Implementation Plans, as well as showcasing bulk infrastructure investment projects per district.

Data source: SAP PPM; District Plan Vol. 3 2023

KEY TAKE-AWAY TRENDS:

- **21% of listed urban restructuring and upgrading projects are expected to be completed in 2024, with a further 48% to be completed by 2027.** Significant projects that are anticipated to be completed are IRT Phase 2A projects, Potsdam WWTW, and Zandvliet WWTW.

- Spatial Planning and Environment, Urban Mobility, and Water and Sanitation are the **directorates with the most projects**, reflecting aims to create a well-planned city with increased transport connectivity and improved bulk services.



Map F3-a: SAP PPM Projects depicted by Directorate with PLFAs

PLFA	Count	Pct. within PLFA
EFA	18	15%
DFA	23	19%
USFA	17	14%
Outside PLFA	36	29%
Missing Information	30	24%

Table F3-a: PLFA type, Project count and Percentage of projects which fall under PLFAs

Graph F3-a: Count of start and end year projects listed in SAP PPM dataset

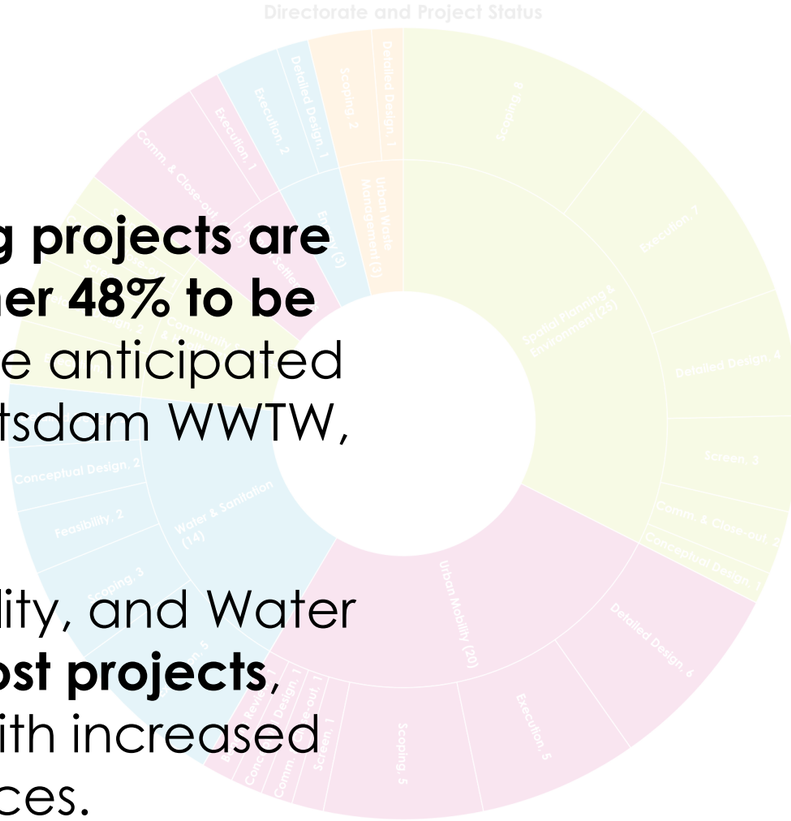


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Not Initiated	23	19%
Missing Information	24	19%

Table F3-b: Current status and project count

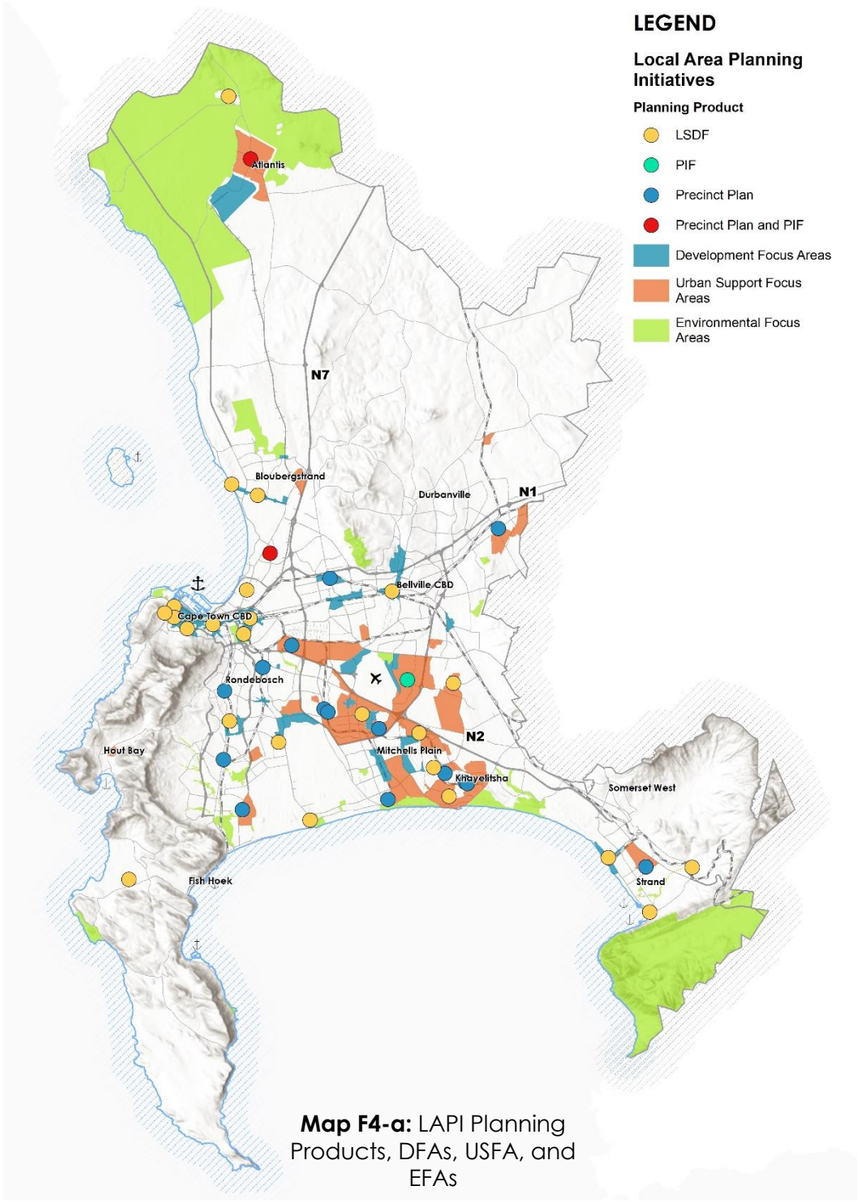
F.4

PUBLIC INVESTMENT

PROGRESS: PRIORITISED LAPIS

This indicator monitors the progress of developing LAPIs (local area planning initiatives) prioritised in the approved MSDF and DSDF 2023.

Data source: SAP PPM; District Plan Vol. 3 2023



Map F4-a: LAPI Planning Products, DFAs, USFA, and EFAs

OVERVIEW

LAPIs consist of Local Spatial Development Frameworks (LSDFs), Public Investment Frameworks (PIFs), and Precinct Plans (depicted on **map F4-a**). These planning products provide a greater level of planning direction in strategic locations and have a stronger focus on implementation.

The DSDF identified PLFAs (Priority Local Focus Areas), which provides a district/local level basis for spatial prioritisation and aims to guide implementation through directing public investment, incentives, budgets and planning for the short to medium term. These areas consist of Development Focus Areas (DFAs), Urban Support Focus Areas (USFAs) or Environmental Focus Areas (EFAs), and are also depicted on **map F4-a**. 59 LAPIs were identified and prioritised to be developed in the approved DSDFs based on their location to PLFAs.

Figure F4-a depicts stages in the development process of LAPIs that have been prioritised by the MSDF and DSDF. Projects are divided into each district and further into project status. KMPGBD has five projects in progress and in the pipeline/initiation phase. The majority of projects in Table Bay and Cape Flats is also in progress. Blaauwberg has three projects in progress and in the pipeline/initiation phase. The Tygerberg District has three projects in implementation phase, while the majority of Southern and Helderberg's projects are in the pipeline/initiation phase. Lastly, the Northern District is equally split with one project in progress, one in pipeline/initiation and one in implementation phase. When considering all districts, 11 projects are in implementation phase (shown in **table F4-a**). Recently approved LSDFs, which are now in the implementation phase, include Mamre, Bo-Kaap, Two Rivers and District 6.

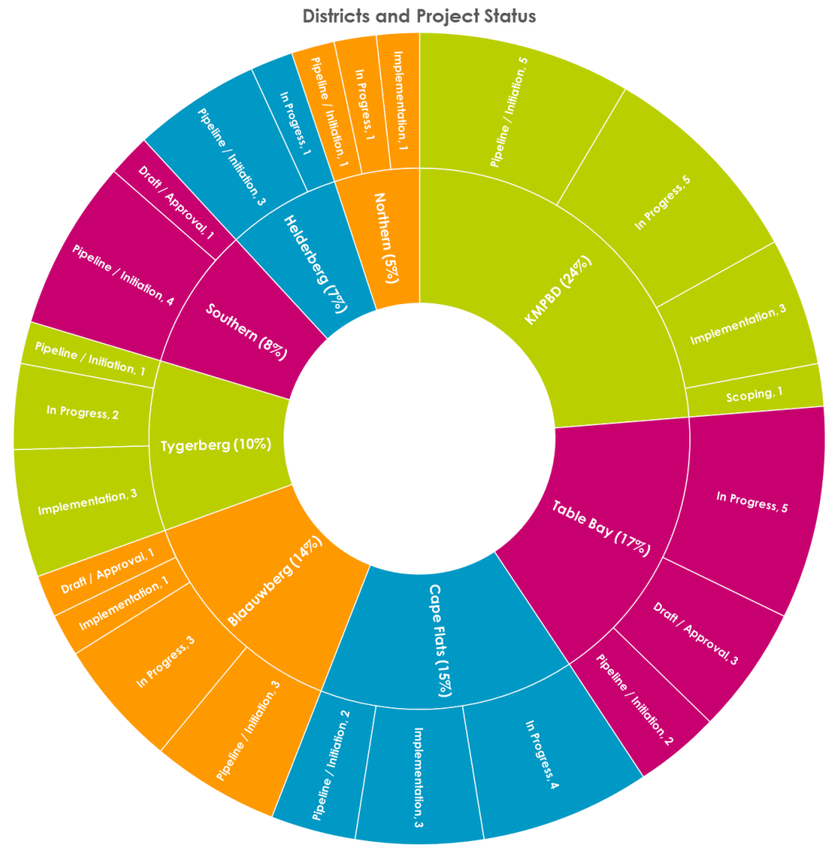
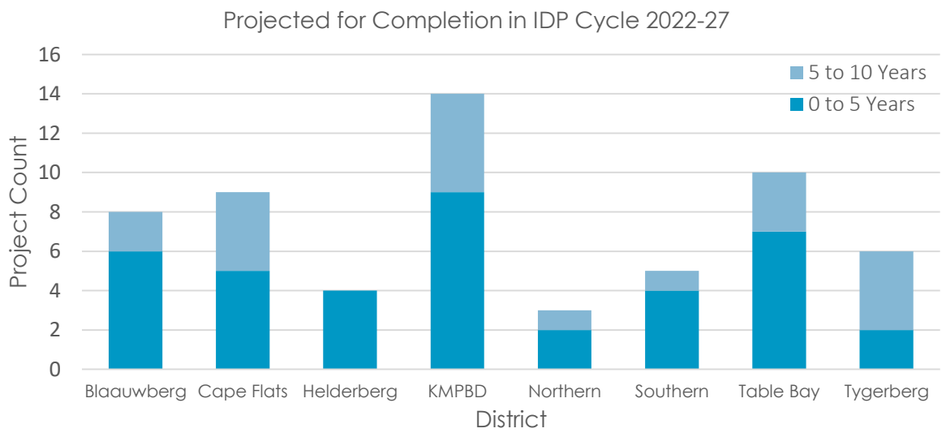


Figure F4-a: Sunburst diagram showing the division of project types in each district

Planning Product Status	Definition	Count
Scoping	Determining whether LAPI is required/appropriate.	1
Pipeline / Initiation	Project is planned to commence shortly. (Obtaining approvals for resources, budgets)	21
In Progress	Project is currently underway. *(Investigations, drafting, public engagements)*	21
Draft / Approval	LAPI Product is complete and ready for final approval/adoption.	5
Implementation	LAPI Product has been approved/adopted.	11

Table F4-a: Planning product status, definition and totals relating to project status



Graph F4-a: Projection of projects for completion in the IDP cycle ranging from 2022 to 2027

Graph F4-a monitors the projection of projects for completion in two stage gates: 0 to 5 years and 5 to 10 years. Overall, 66% of projects are projected to be completed within 5 to 10 years, while 34% of projects will be completed in the next 5 to 10 years.

F.4

PUBLIC INVESTMENT

PROGRESS: PRIORITISED LAPIS

This indicator monitors the progress of developing LAPIs (Local Area Planning Initiatives) prioritised in the approved MSDF and DSDF 2023.

Data source: SAP PPM; District Plan Vol. 3 2023

KEY TAKE-AWAY TRENDS:

- The districts of **KPMBD, Table Bay and Blaauwberg currently have the most LAPIs** estimated for completion in the next five years with **24%, 17%, and 15%** of the projects, respectively.

- Between all districts, **19% of LAPIs are approved and currently in implementation phase**. Recently approved LSDF projects in 2023, which are now in the implementation phase, include Mamre, Bo-Kaap, Two Rivers and District 6.



Map F3-a: LAPI Planning Products, DFAs, USFA, and EFAs

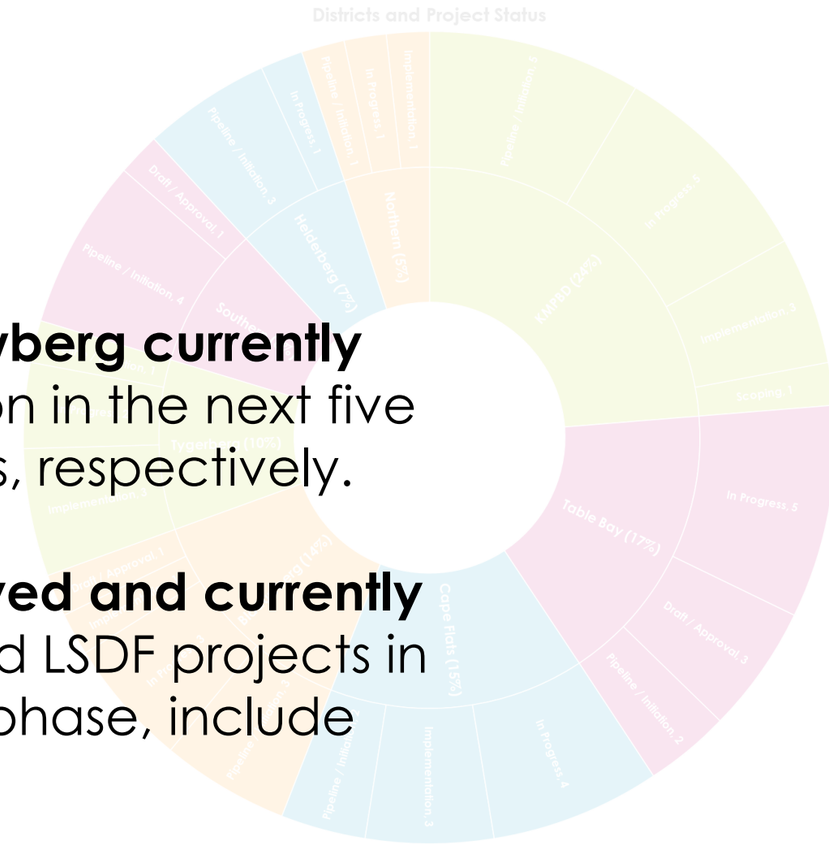


Figure E1-a: Sunburst diagram showing the division of project types in each district

Planning Product Status	Definition	Count
Scoping	Determining whether LAPI is required / appropriate.	1
Pipeline / Initiation	Project is planned to commence shortly. (Obtaining approvals for resources, budgets)	21
In Progress	Project is currently underway. *(Investigations, drafting, public engagements)*	21
Draft / Approval	LAPI Product is complete and ready for final approval / adoption.	5
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OVERVIEW

LAPIs consist of Local Spatial Development Frameworks (LSDFs), Public Investment Frameworks (PIFs), and Precinct Plans (depicted on **Map F3-a**). These planning products provide a greater level of planning direction in strategic locations and have a stronger focus on implementation.

The DSDF identified PLFAs (Priority Local Focus Areas), which provides a district/local level basis for spatial prioritisation and aims to guide implementation through directing public investment, incentives, budgets and planning for the short to medium term. These areas consist of Development Focus Areas (DFAs), Urban Support Focus Areas (USFAs) or Environmental Focus Areas (EFAs), and are also depicted on **Map F3-a**. 59 LAPIs were identified and prioritised to be developed in the approved DSDFs based on their location to PLFAs.

Figure E1-a depicts stages in the development process of LAPIs per district. Projects are divided into [illegible] further into project status. KMPBD has five projects in progress and in the pipeline/initiation phase. The majority of projects in Table Bay and Cape Flats are also in progress. Blaauwberg has three projects in implementation phase. The Tygerberg district has three projects in implementation phase, one in pipeline/initiation and one in implementation phase. Helderberg has one project in implementation phase (shown in **Table F3-a**). Recently approved LSDFs, which are now in the implementation phase, include Mamre, Bo-Kaap, TRUP and District 6.

G : PROGRESS ON DEVELOPMENT MECHANISMS/ INCENTIVES

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

G.1

IMPLEMENTATION TRACKING

This indicator displays current development mechanisms and indicates the progress of each respective indicator.
Data source: District Plan Vol. 3 2023; PT1 and PT2: Municipal Planning Bylaw Amendment 2022; Investment Incentives Policy 2018.

PROGRESS: IMPLEMENTATION OF DEVELOPMENT MECHANISMS/INCENTIVES

OVERVIEW

The identification of current and required development mechanisms were investigated during the review of the DSDF. The main objectives were to identify pragmatic mechanisms that can be implemented within the lifespan of the DSDF to support its development proposals. This section provides a summary of the progress and statuses of the following mechanisms: NHRA Exemptions, Industrial Overlay Zones, Draft NEMA Urban Areas, and PT1 and PT2 Zones.

NHRA Exemptions:

The aim of this project is to undertake heritage audits in areas where we would like to investigate exemptions of certain sections of the NHRA (i.e. S34 and 38), in an attempt to reduce the administrative burden/red tape due to dual application processes required by developers. The areas of focus for investigation are the Development Focus Areas (DFAs) with no/low conservation worthy heritage resources, similar to the Parow Station precinct which was gazetted as a NHRA exemption area (**map G1-b**).

Progress:

In progress: Fieldwork and public participation/ consultation process completed. Preparing submission to Heritage Western Cape (HWC) for approval.

Investment Incentives Policy:

The Investment Incentives Policy aims to attract job-creating investment into Cape Town's economy with a specific focus on making it a preferred business destination. The policy currently offers the following incentives: Deferred DC Payments, Exemption of Development Application Fees, Development Application Fast-Tracking, and Discounted Electricity Tariffs.

Progress:

Active: The incentives that stem from this policy are approved and currently available for the six manufacturing areas depicted in **map G1-a**, and all tertiary sector land uses in the city.

Draft NEMA Urban Area:

Provides appropriate exclusions from the National Environmental Management Act, Act 107 of 1998 (NEMA) for listed activities contained within spatially targeted areas that would trigger a Basic Impact Assessment or Full Environmental Impact Assessment (**map G1-b**).

Progress:

In progress: Discussions with DEA&DP underway regarding the alignment of the proposed NEMA Urban Area with the Urban Development Edge.

Incentive Overlay Zine (IOZ):

A regulatory tool that refers to a zoning, in addition to the base zoning. The purpose of the IOZ is to allow for desired densities, land use types, and economic sector types of development in certain strategic priority areas of the city, or what the District SDF refers to as Development Focus Areas (DFAs), through enhancement of development rights and reduced timeframes for approval.

Progress:

In progress: Technical investigation underway to determine viability of the incentive overlay zone and identify appropriate DFAs for inclusion.

PT1 and PT2 Zones (Public Transport Zones):

PT1 and PT2 zones offer reduced off-street parking requirements for developments in areas already well-served by public transport. This aims to encourage the intensification of development as well as a reduction in the number of private transport trips generated to and from these areas (**map G1-a**).

Progress:

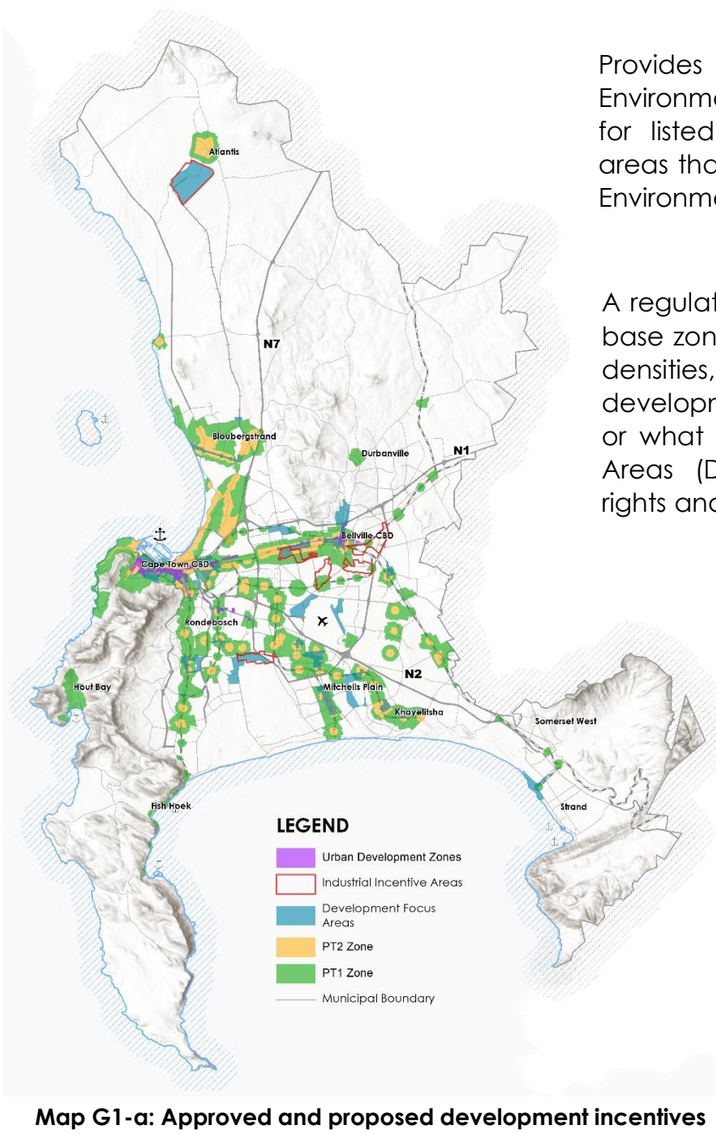
Active: The PT1 and PT2 areas are approved as part of the Municipal Planning By-law.

Urban Development Zone (UDZ)

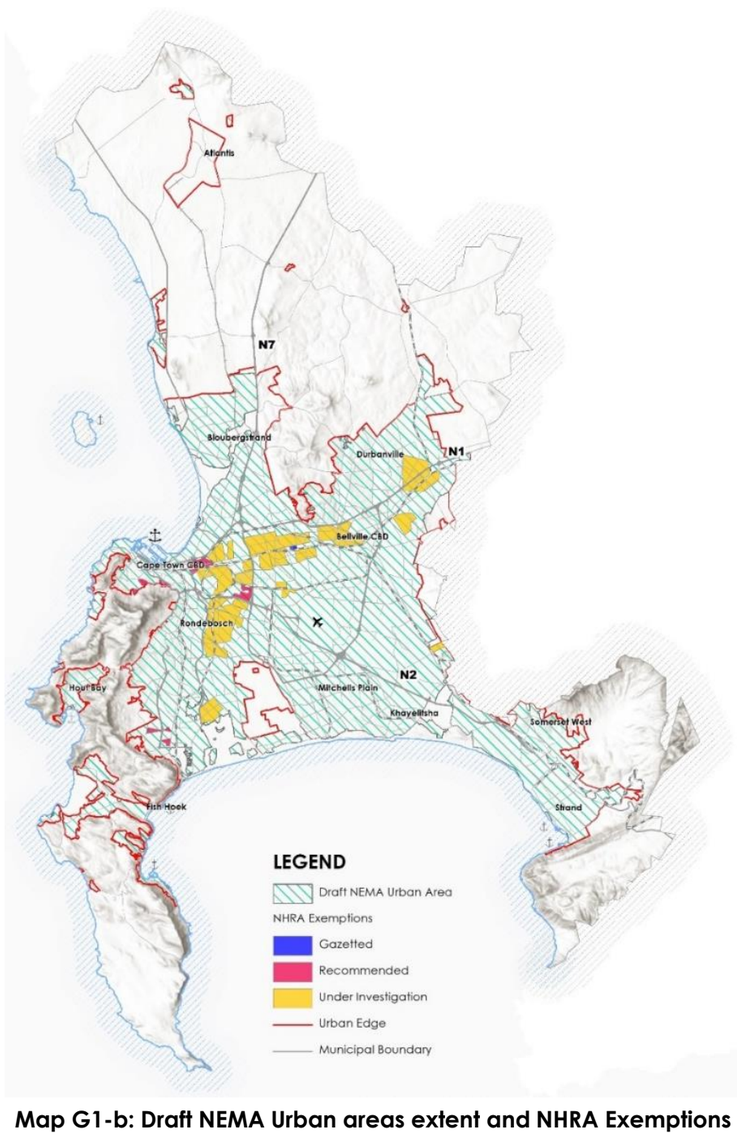
The UDZ is a National Treasury tax incentive administered by the municipality that aims to address urban decay in South Africa's inner cities by promoting private sector-led investment in commercial and residential developments. The incentive is currently applicable to the central city, Parow and Belleville **(map G1-a).**

Progress:

Active: The incentive is active and is currently approved by the City of Cape Town and the National Treasury.



Map G1-a: Approved and proposed development incentives



Map G1-b: Draft NEMA Urban areas extent and NHRA Exemptions

G.1

IMPLEMENTATION TRACKING

This indicator displays current development mechanisms and indicates the progress of each respective indicator.
Data source: District Plan Vol. 3 2023; PT1 and PT2: Municipal Planning Bylaw Amendment 2022; Investment Incentives Policy 2018.

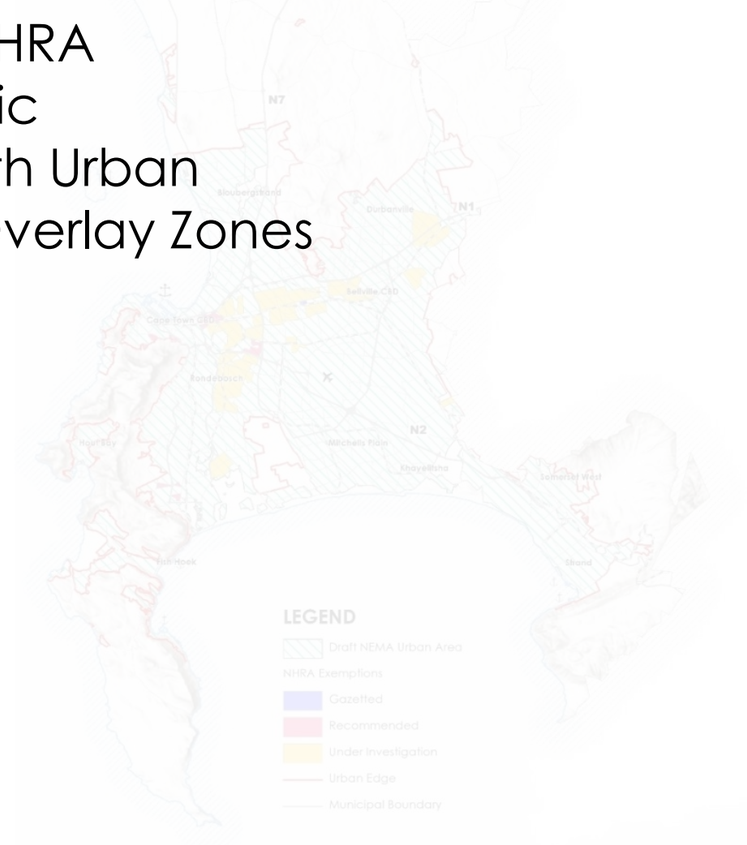
PROGRESS: IMPLEMENTATION OF DEVELOPMENT MECHANISMS/INCENTIVES

KEY TAKE-AWAY TRENDS:

- **Active mechanisms** include the Investment Incentives Policy (approved and available for six manufacturing areas and tertiary sector land uses) and PT1 & PT2 Zones (part of Municipal Planning By-law).
- Mechanisms which are **still in progress** include NHRA Exemptions (which has recently undergone public participation), NEMA Urban Areas (alignment with Urban Development Edge is required), and Incentive Overlay Zones (technical investigation is underway).



Map G1-a: Approved and proposed development incentives



Map G1-b: Draft NEMA Urban areas extent and NHRA Exemptions

VERSION CONTROL

The intention is for a comprehensive report (comprising all indicators) to be compiled every three years with supplementary updates for indicators D5-8, F1-4 and G1 on an annual basis subject to source data availability.

Publication	Publication Type	Expected Release Date
Version 1.0	**Comprehensive Report**	**November 2023**
Version 1.1	Annual Supplement	November 2024
Version 1.2	Annual Supplement	November 2025

MAIN DATA SOURCES

The following table summarises the main data sources used in this report:

Source Data	Data Custodian	Time Series
General Valuations Roll	CCT – Valuations Department	2012, 2015 and 2018
Property Sales Transactions	CCT – Valuation Department	2009 – 2022
Bio-Net	CCT – Environmental Management	2009 – 2019
Environmental Land Acquisitions	CCT – Environmental Management	2012 – 2022
Agricultural Areas of Significance	WCG – Department of Agriculture	2012 – 2023
EIA Applications	WCG – DEADP	2018 (June) – 2023 (March)
Urban Development Edge	CCT – Urban Planning and Design	2012 – 2023
Built Extent	CCT – Urban Planning and Design	2012 – 2022
New Development Areas	CCT – Urban Planning and Design	2023
MSDF and DSDFs	CCT – Urban Planning and Design	2023
Building Plan Approvals (DAMS)	CCT – Development Management	2016 – 2023 (Feb)
Human Settlements Projects; Areas of Informality	WCG & CCT – Human Settlements	2013/14 – 2022/23
Capital Projects (SAP PPM)	CCT - Corporate Project, Programme and Portfolio Management	2016/17 - 2022/23

END

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD