SPATIAL TRENDS & IMPLEMENTATION TRACKING

DATA, MONITORING & EVALUATION REPORT

DEPARTMENT: URBAN PLANNING AND DESIGN

PERIOD: JULY 2023 – JUNE 2024

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Making progress possible. Together.

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EDITORS' NOTE

Scope of the 2024 Review

The 2024 Spatial Trend Report encompasses a comprehensive overview of the land use patterns and trends evident within Cape Town. Our endeavour with undertaking spatial trend reporting is to provide year on year analysis and refinements to key panels, ensuring the most accurate and up-to-date insights available data can provide. We will also incorporate special features from year to year to spotlight certain noteworthy spatial trends.

In this year's report we have included a panel on one of the active mechanisms available to developers within spatially targeted areas across the city – the Cape Town Urban Development Zone (UDZ) incentive. This tax incentive scheme is aimed at encouraging inner city renewal across South Africa by the South African Revenue Services, as was gazetted in 2004. The panel aims to capture the uptake of this incentive within Cape Town over this time period and can be found in Part 2 of the report, the Implementation Tracking Report.

In addition, we are including the economic profiles of two economic areas currently targeted for incentives (attached to this report as ANNEXURE A), to show more detailed information with regard to the development, various economic sectors and available land in these nodes .

Enhancements to Calculation Method

This panels referred to below have drawn on the most recent and updated data available which has contributed to a significant enhancement in our calculation methods, notably through the integration of similarly-analysed General Valuation roll data for the time period of 2012 to 2022. This has the potential to significantly improve the accuracy and reliability of our analyses, providing a comparable picture of current trends. This analysis was based on a coherent and similar methodology, to ensure a perspective to data using exactly the same points of departure and classification categories over multiple years - leading to more consistent comparisons on comparable basis.

Panels

Specific panels which capture/reflect the latest available data sources include the following:

- Urban Extent
- Environmental Impact Assessments
- Residential Density within Spatial Transformation Areas and Spatially Targeted Areas
- Non-Residential Development
- Property Value Change
- Diversity and Intensity of Land Use
- Informality
- Government Subsidised Housing
- Capital Expenditure and Implementation of Mechanisms

Reflections on Spatial Trends in Cape Town

The panels depict significant spatial trends within Cape Town. Urban expansion continues to reshape the city's landscape, while environmental impact assessments highlight the ongoing efforts to balance development with sustainability. Residential density in targeted areas shows a shift towards more inward growth, indicating progress in spatial transformation. Non-residential development trends within the City's existing development corridors and key employment nodes suggest various sectors' locational preferences and the reinforcement of these existing spatial patterns. The diversity and intensity of land use, alongside the prevalence of informality, provide a nuanced view of the city's evolving spatial patterns and trends. Additionally, the data on government-subsidised housing and capital expenditure underscore the city's commitment to inclusive growth and infrastructure development.

Looking Ahead

The next review is scheduled for the 2024/2025 financial year. We look forward to continuing to provide valuable insights and updates on Cape Town's land use development patterns and trends.

We thank our contributors, stakeholders, and readers for their continued support and engagement as we strive for excellence in spatial trend reporting within Cape Town.

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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
Abbreviations and Acronyms

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 of use in STAs (metro level)
    c. Diversity of use in STAs (district level)
    d. Intensity of use (metro-wide and district level)
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. 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)

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

ANNEXURE A

BRACKENFELL INDUSTRIAL ECONOMIC AREA PROFILE
EPPING INDUSTRIAL ECONOMIC AREA PROFILE

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 the relevant theme and associated indicators.

MONITORING AND EVALUATION FRAMEWORK

KEY TERMS AND DEFINTIONS

SPATIAL TRANSFORMATION AREAS:

Represents spatially targeted areas for public and private sector investment as a means of achieving spatial transformation demarcated in the City's Municipal Spatial Development Framework. They include the following categories:

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.

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.

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).

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.

SPATIALLY TARGETED AREAS:

The 2023 District Spatial Development Frameworks targets smaller or more localised areas for development and public investment known collectively as the "**Spatially Targeted Areas**". These include the following categories:

New development areas (NDAs): An area earmarked for future development. undeveloped and partially developed land parcels that are suited for future residential or non-residential urban development. The areas were identified through a technical investigative process for the City's 2040 Land Use Model. The purpose was to determine the number of residential units and gross leasable area of non-residential land uses which could be accommodated on the land parcels in future.

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

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.

Mixed use intensification areas (MUIAs): 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.

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.

GENERAL URBAN PLANNING TERMS:

Common terms derived from spatial planning policy used throughout this report.

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.
Gross Density: The number of dwelling units per hectare of land calculated without deducting any uninhabited space (roads, parks, etc.) or non-residential uses.
Net Density: The number of dwelling units per hectare of land calculated on the basis of land used for residential purposes only, including the garden and off-street parking.

Development Corridors: Development corridors are broad areas of high-intensity urban development focused predominantly on activity /development routes serviced by mass rapid public transport services (i.e. rail or bus services like MyCiTi).

Diversification: Land use diversity is commonly referred to as mixed land use. It refers to the horizontal or vertical integration of suitable and compatible residential and non-residential land uses within the same building, land parcel or area.

Intensification: Refers to achieving a greater quantum and spectrum of mixed uses (commercial, industrial and residential) through the increased use of space, both horizontally and vertically. Intensification can be on top of an existing building, on a single or multiple land parcels or within an area. It can also be the result of new developments on vacant land or redeveloped land of which the increased number of residential units or square metres of floor area constructed, lead to higher population presence or higher employment density (more people or more jobs per hectare as).

Nodes: Significant and concentrated development in terms of scale, location, impact, diversity and agglomeration of functions (facilities, services and economic activities).

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.

ABBREVIATIONS AND ACRONYMS

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 Parks
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

INTRODUCTION

- The Logic Model
- Monitoring and evaluation framework
- User Guide
- Thematic Index

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MONITORING AND EVALUATION FRAMEWORK

INTRODUCTION

Purpose of this report

This report is an updated Spatial Trends report from the July 2022 - June 2023 version.
The main updates made include statistics information based on available data. The panels update from the previous version are indicated by this symbol (insert symbol) and new panels that were not part of the previous version are indicated by this symbol (insert symbol)

This report is reviewed annually to depict changes from year to year based on available data. The purpose of this report is to provide 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 continuous 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.

UNITENDED 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.

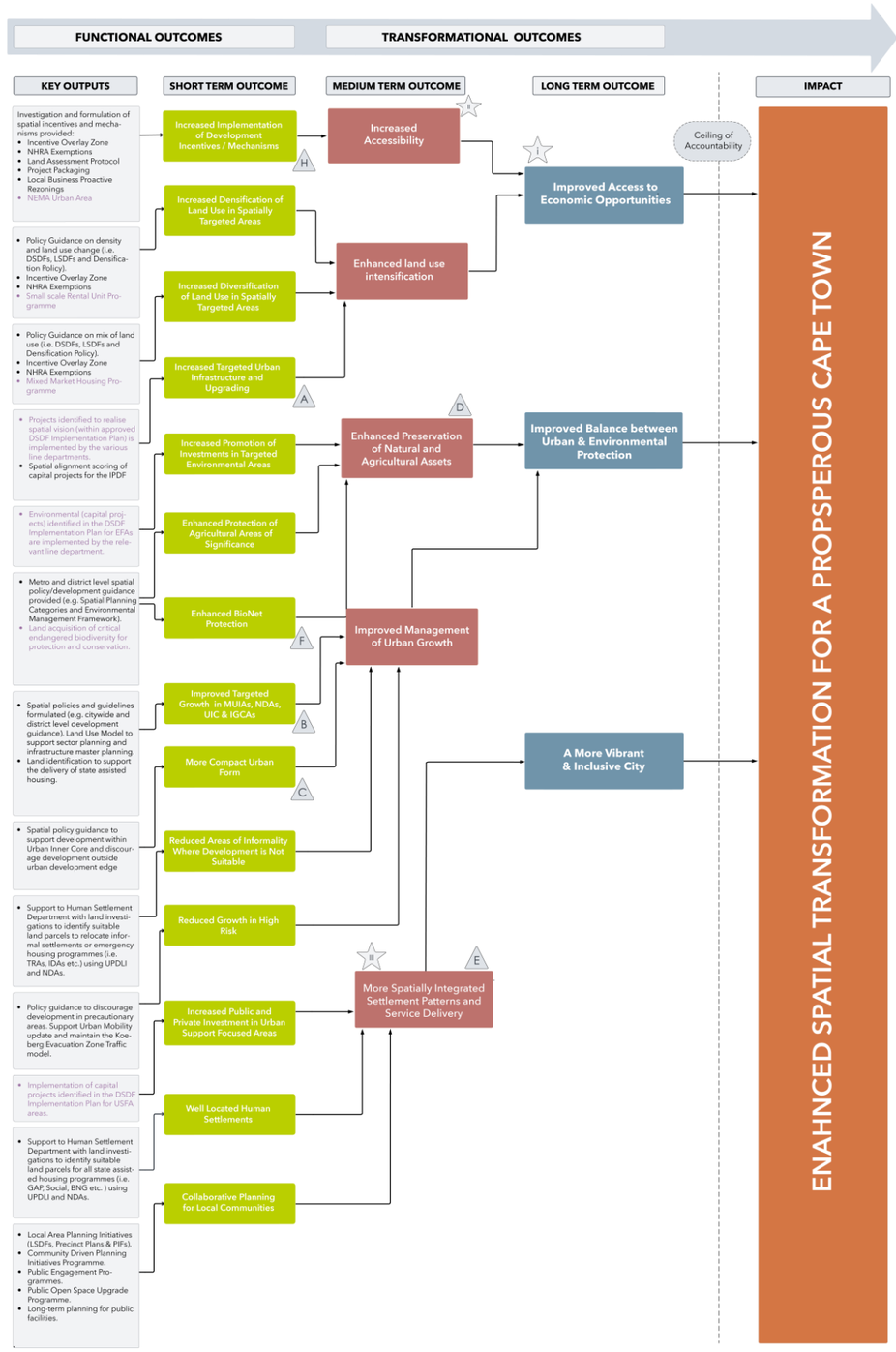
EXTERNAL/RISK FACTORS

- 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

- A — Assumption
- I — Unitended Consequence
- Short-Term Outcome
- Medium-Term Outcome
- Long-Term Outcome
- Impact
- Outcome Dependant of External Line Department and 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

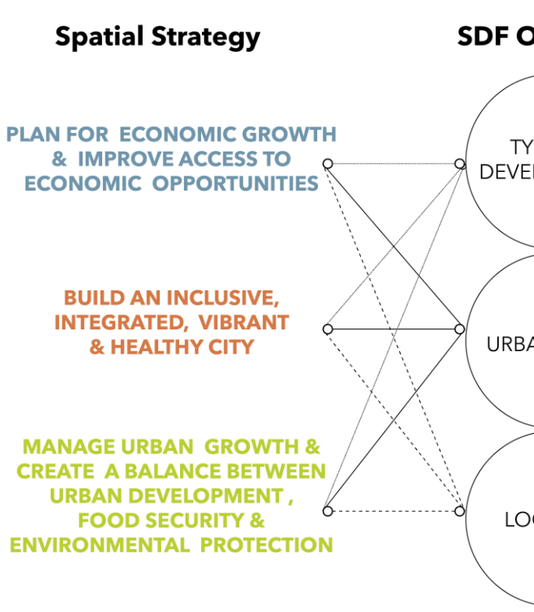
Why?

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

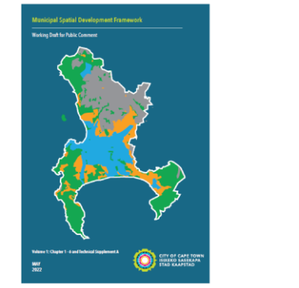
- LAND USE INTENSIFCATION
- SPATIAL LOCATION OF PUBLIC INVESTMENT
- URBAN EXTENT
- NATURAL & AGRICULTURAL ASSETS

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.

USER GUIDE

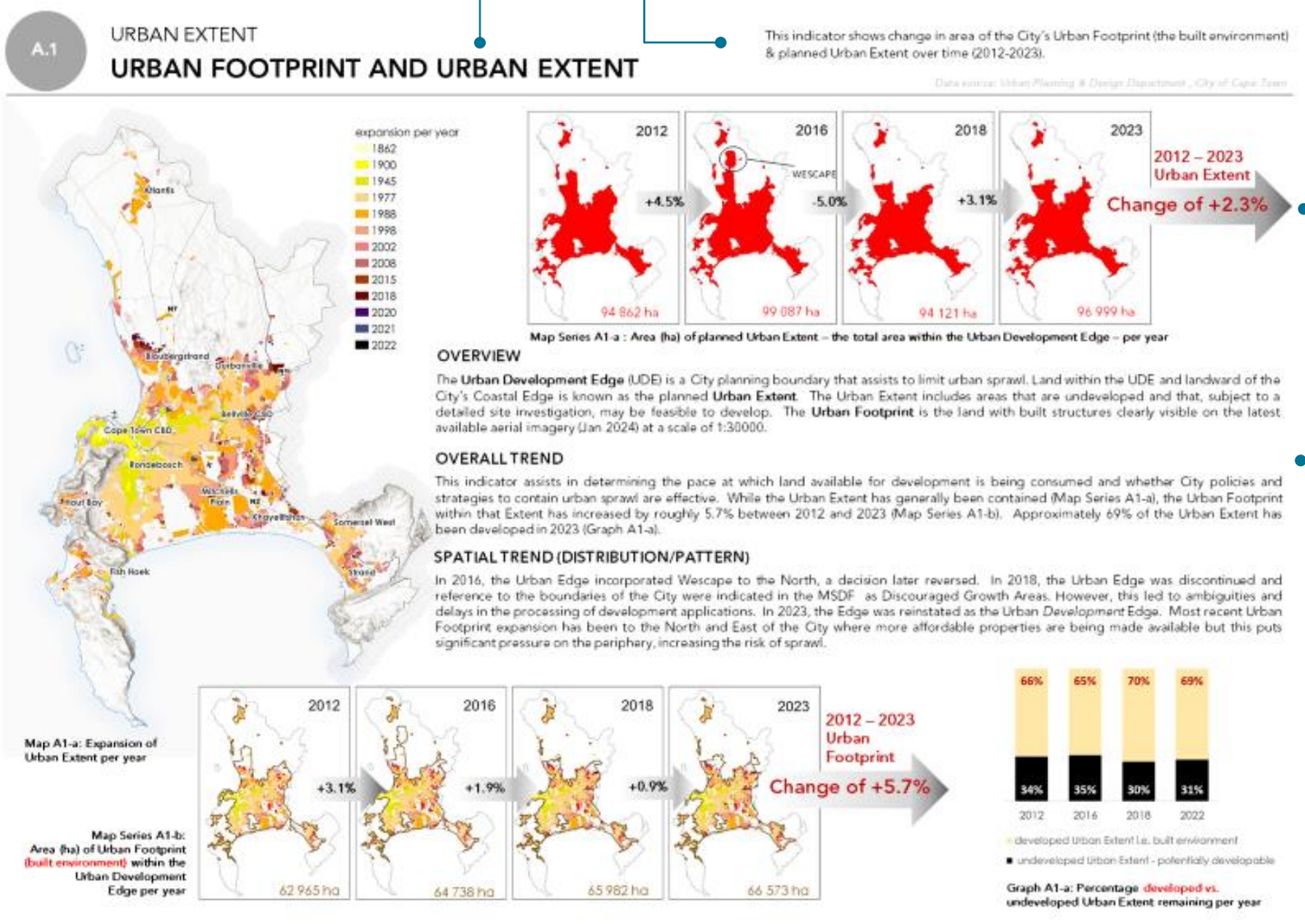
HOW TO INTERPRET THE COMPONENTS OF INFORMATION FOR EACH INDICATOR PANEL

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.

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, 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 — Refer to Annexure A
- 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, C6, C7 & C8
D	Land and Building Development: NDAs, Areas of Informality Indicators: D1 & D2
E	Case Studies Refer to Annexure A
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

PART 1: SPATIAL TRENDS REPORT

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A : URBAN EXTENT

A1 : Urban footprint and urban extent

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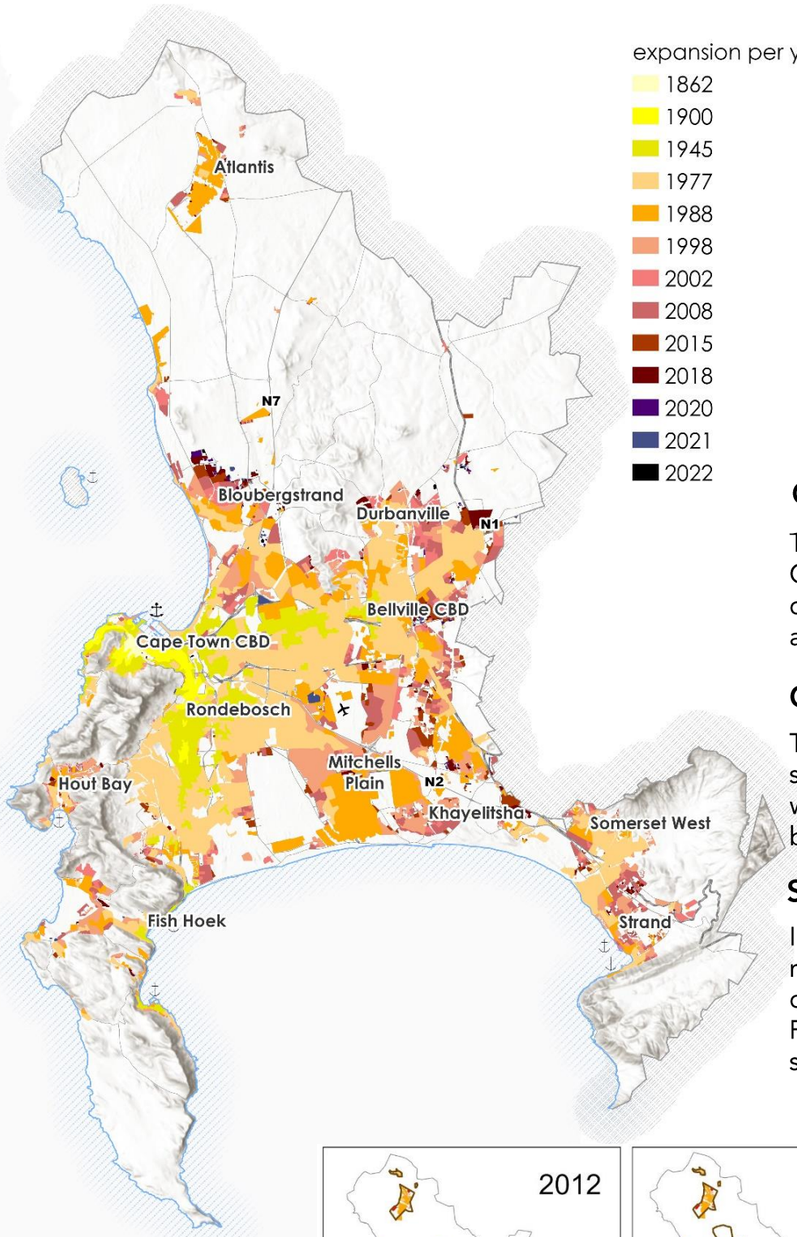
A.1

URBAN EXTENT

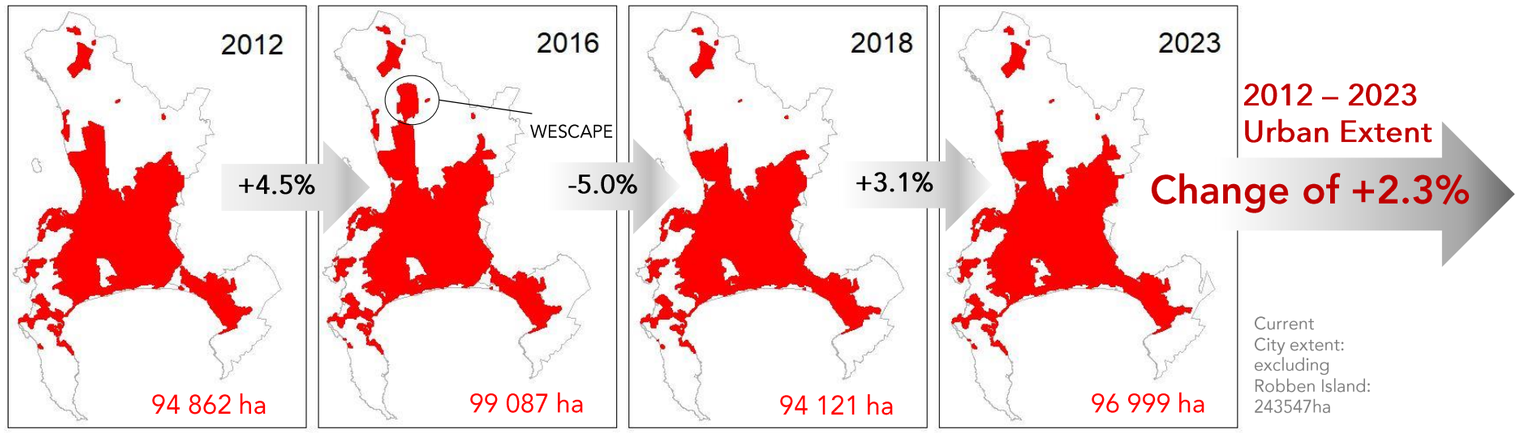
URBAN FOOTPRINT AND URBAN EXTENT

This indicator shows change in area of the City's Urban Footprint (the built environment) & planned Urban Extent over time (2012-2023).

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 total area within the Urban Development Edge – per year

OVERVIEW

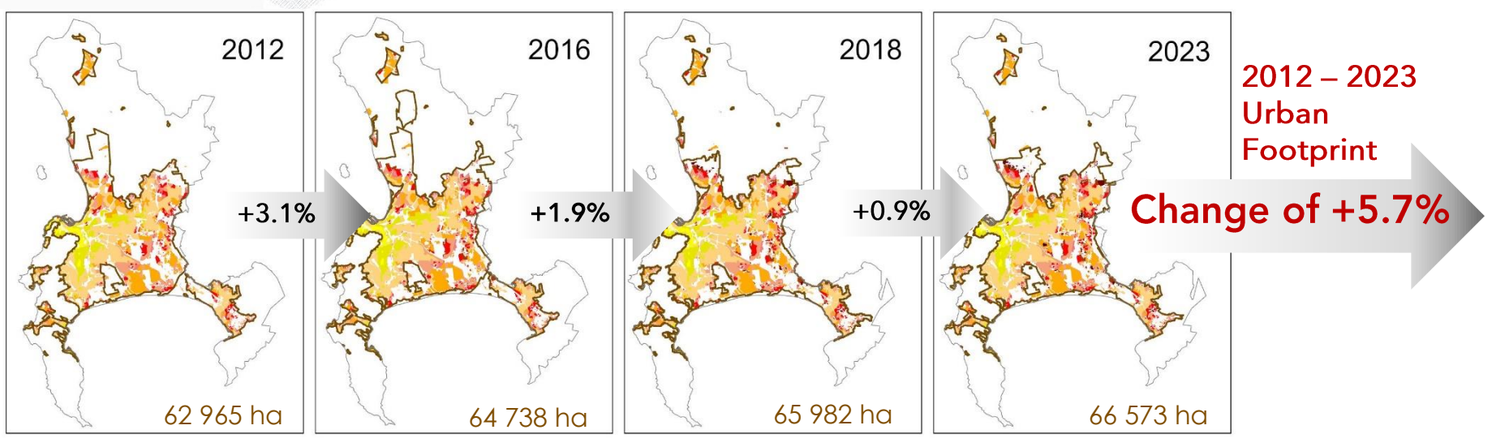
The **Urban Development Edge** (UDE) is a City planning boundary that assists to limit urban sprawl. Land within the UDE and landward of the City's Coastal Edge is known as the planned **Urban Extent**. The Urban Extent includes areas that are undeveloped and that, subject to a detailed site investigation, may be feasible to develop. The **Urban Footprint** is the land with built structures clearly visible on the latest available aerial imagery (Jan 2024) at a scale of 1:30000.

OVERALL TREND

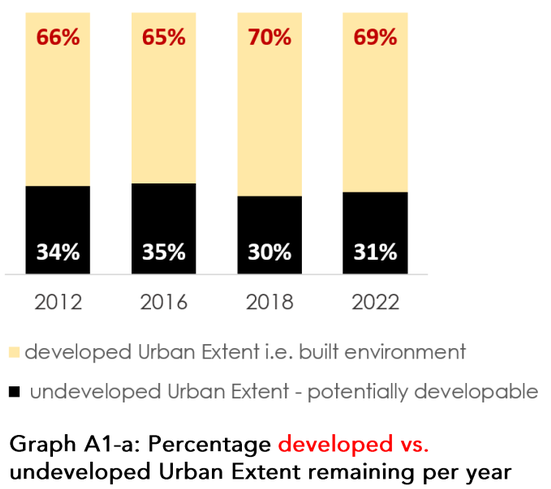
This indicator assists in determining the pace at which land available for development is being consumed and whether City policies and strategies to contain urban sprawl are effective. While the Urban Extent has generally been contained (Map Series A1-a), the Urban Footprint within that Extent has increased by roughly 5.7% between 2012 and 2023 (Map Series A1-b). Approximately 69% of the Urban Extent has been developed in 2023 (Graph A1-a).

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 were 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 (built environment) within the Urban Development Edge per year

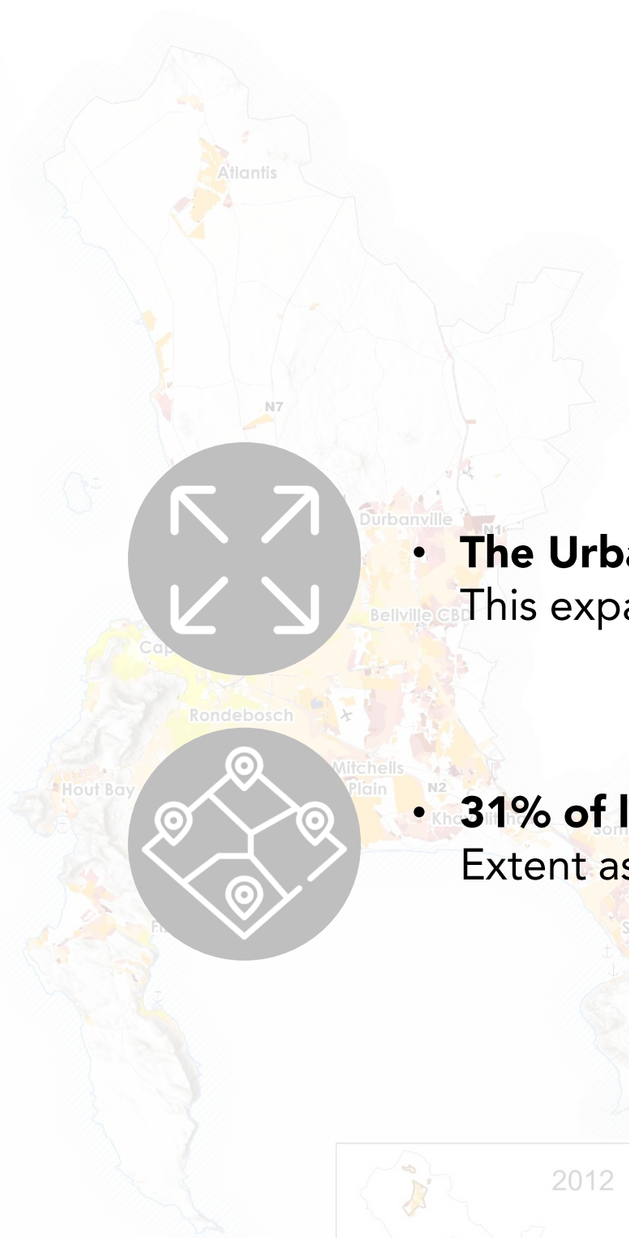


Graph A1-a: Percentage developed vs. undeveloped Urban Extent remaining per year

A.1

URBAN FOOTPRINT AND URBAN EXTENT

KEY TAKE-AWAY TRENDS



Map A1-a: Expansion of Urban Extent per year

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

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

- **The Urban Footprint (built environment) grew by 3608 ha between 2012-2023.** This expansion equates to an area the size of 17x Century City developments.
- **31% of land inside the Urban Development Edge remains undeveloped** i.e. Urban Extent as of 2023.

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 [illegible] investigations, could be suitable for urban development. The **Urban Footprint** is land on which built structures clearly visible on the latest available aerial imagery (Jan 2024) 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 Urban Footprint within that Extent has increased by roughly 5.7% between 2012 and 2023 (Map Series A1-b). Approximately 69% of the Urban Extent has been developed in 2023 (Graph A1-a).

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 were 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.

B : NATURAL AND AGRICULTURAL ASSETS

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

CITY OF CAPE TOWN
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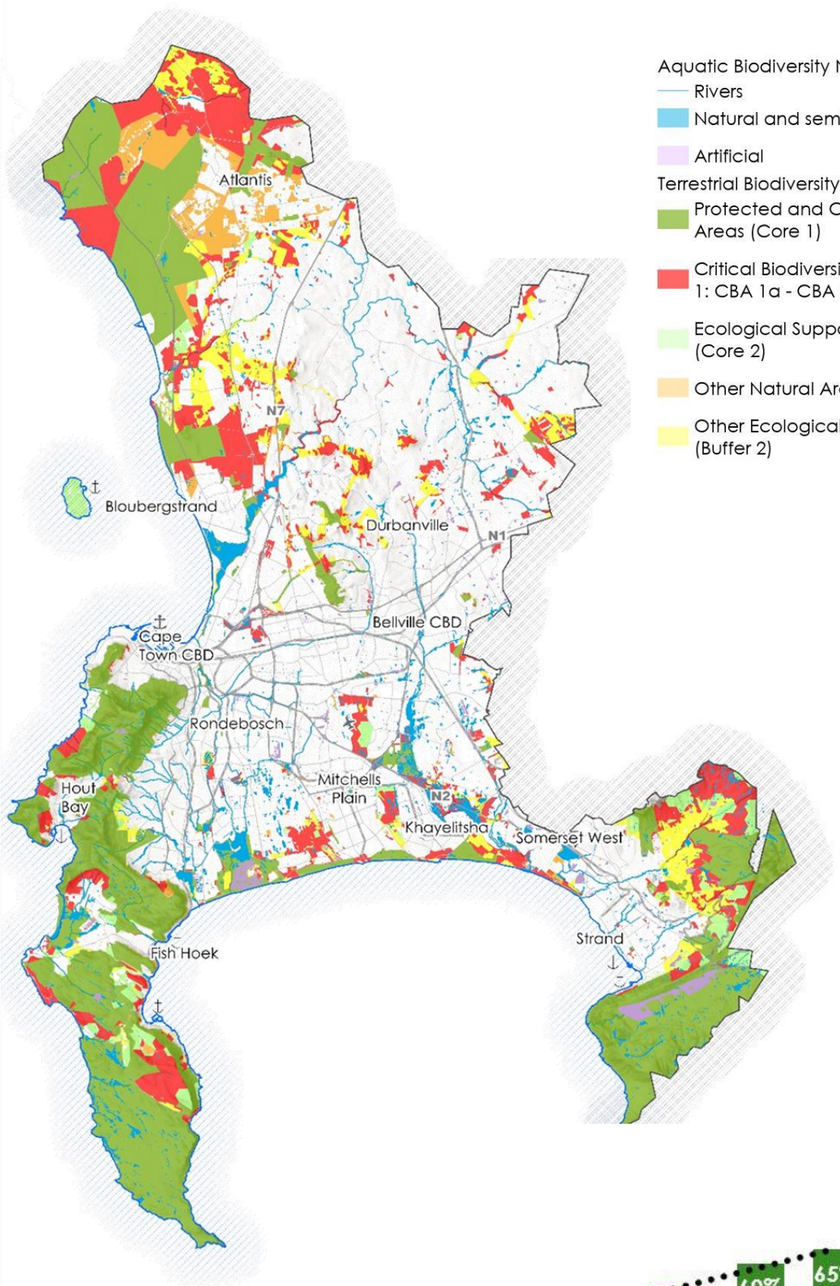
B.1

NATURAL AND AGRICULTURAL ASSETS

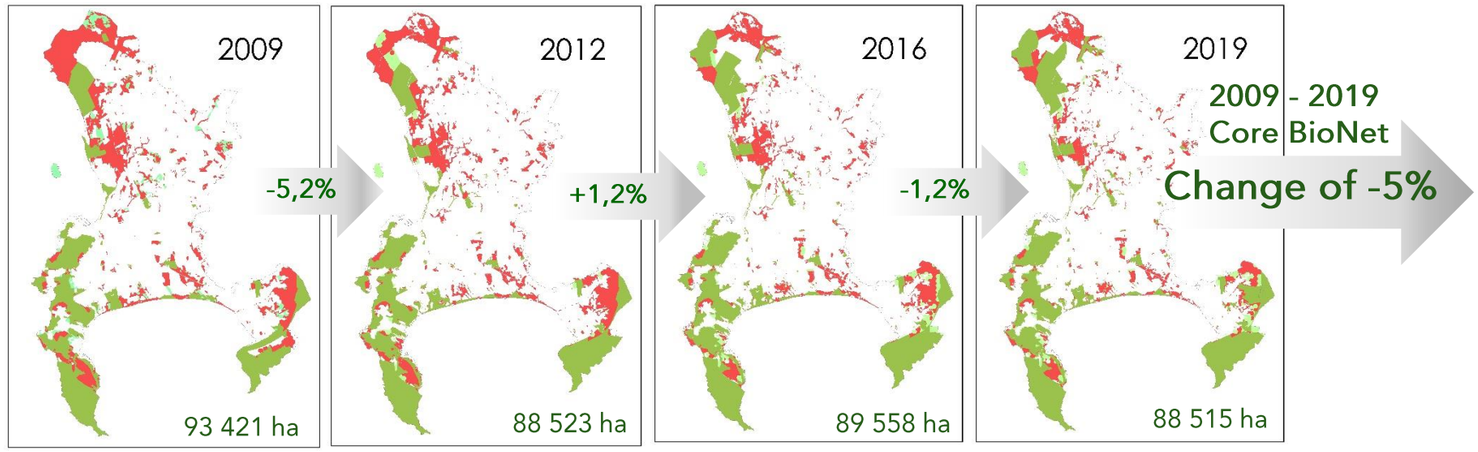
BIODIVERSITY NETWORK

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

Source: Environmental Management, City of Cape Town



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



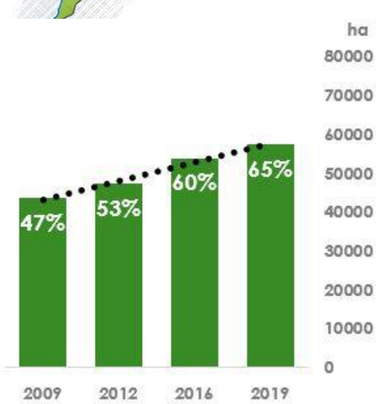
Map series B1-a: Extent (hectares) per year of core biodiversity network i.e. the prioritised remnants of indigenous vegetation.
Note: Only core areas shown above. Biodiversity network buffer 1 and 2 areas not shown above.

OVERVIEW

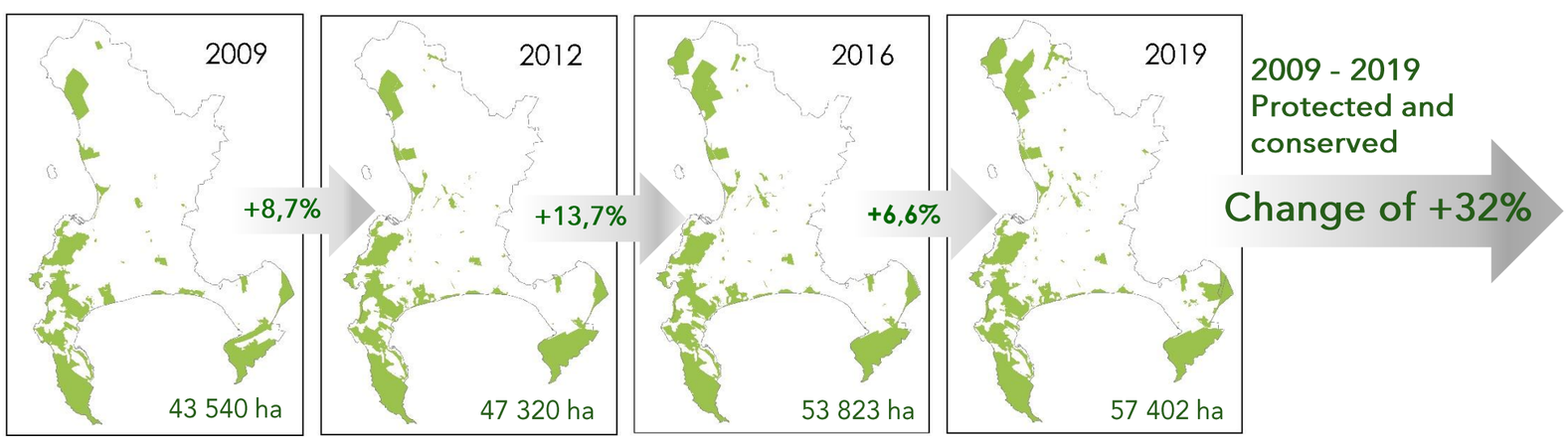
The terrestrial **biodiversity network** (BioNet) is a network of the remaining indigenous vegetation in the city, classified into **critical biodiversity area** (CBA) categories that prioritise the relative importance for conservation of each remnant. The classification is the result of a systematic 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.



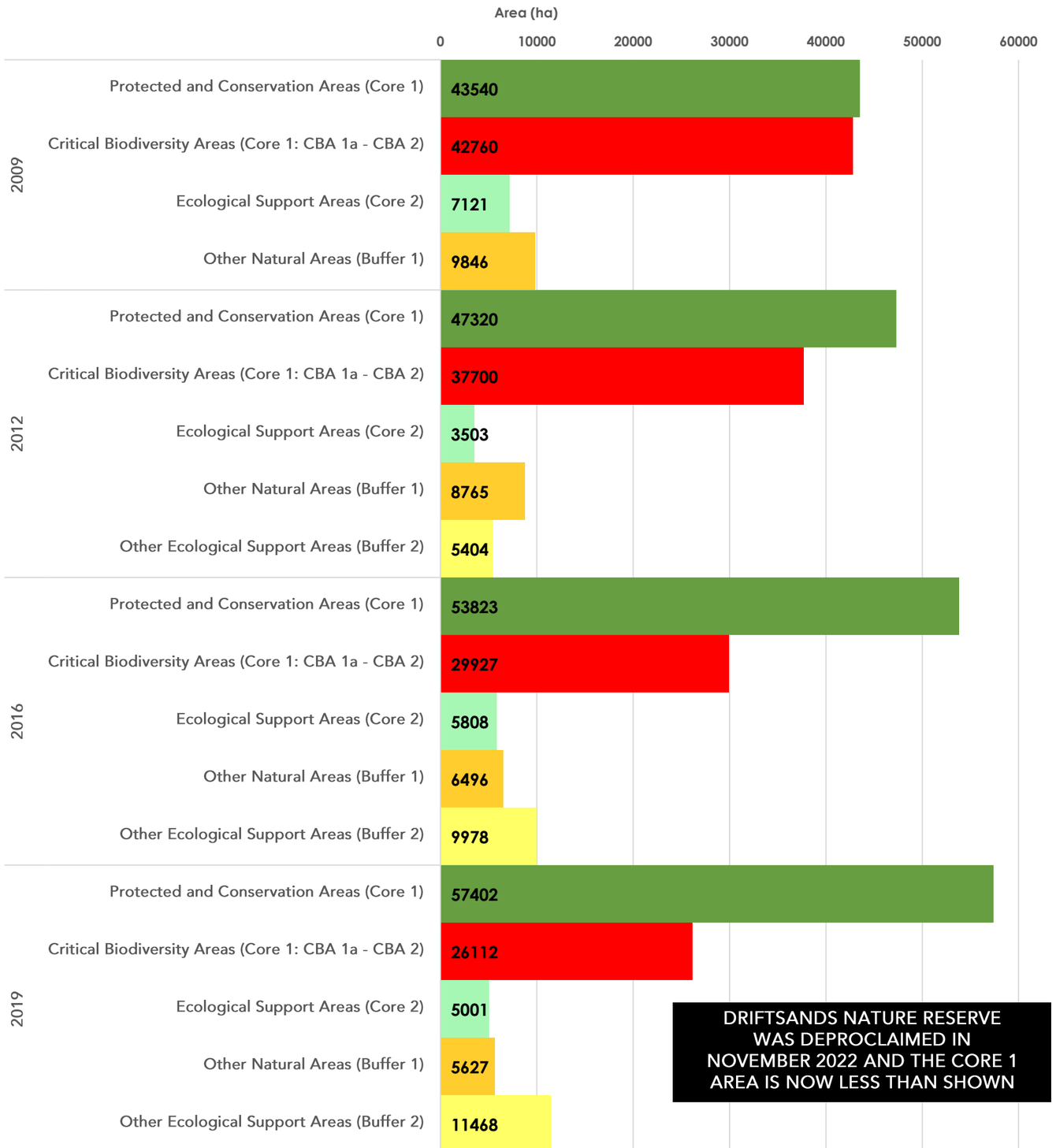
Map series B1-b: Extent (hectares) per year of protected and conserved areas within the biodiversity network.
Note: 2019 area (ha) includes mountainous Table Mountain National Park areas that are managed by SANParks but not yet gazetted.

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.

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)

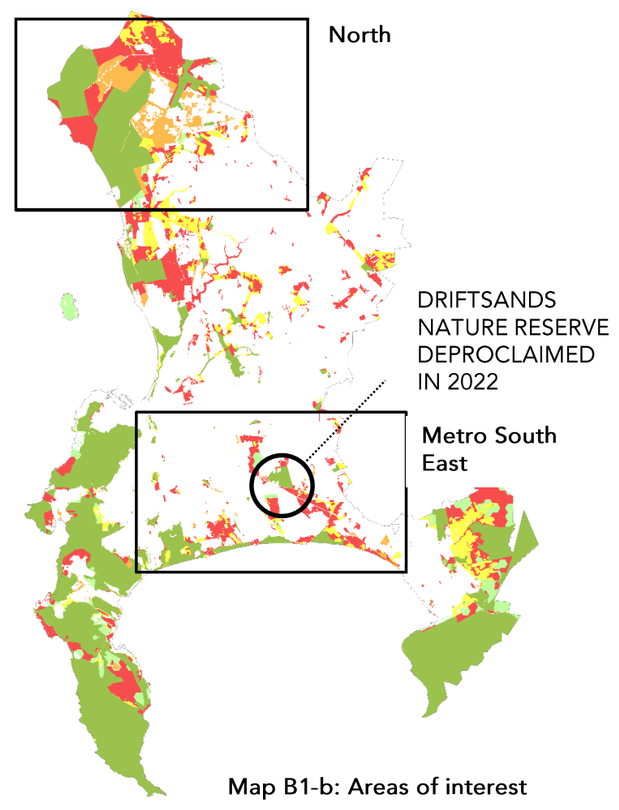
As Graph B1-b shows, there have been significant gains in the proclamation and conservation of the **critical biodiversity areas** (CBAs) of the BioNet. The extent of other natural areas (buffer 1) has almost halved over the period, having been developed or prioritised as core areas in later analyses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



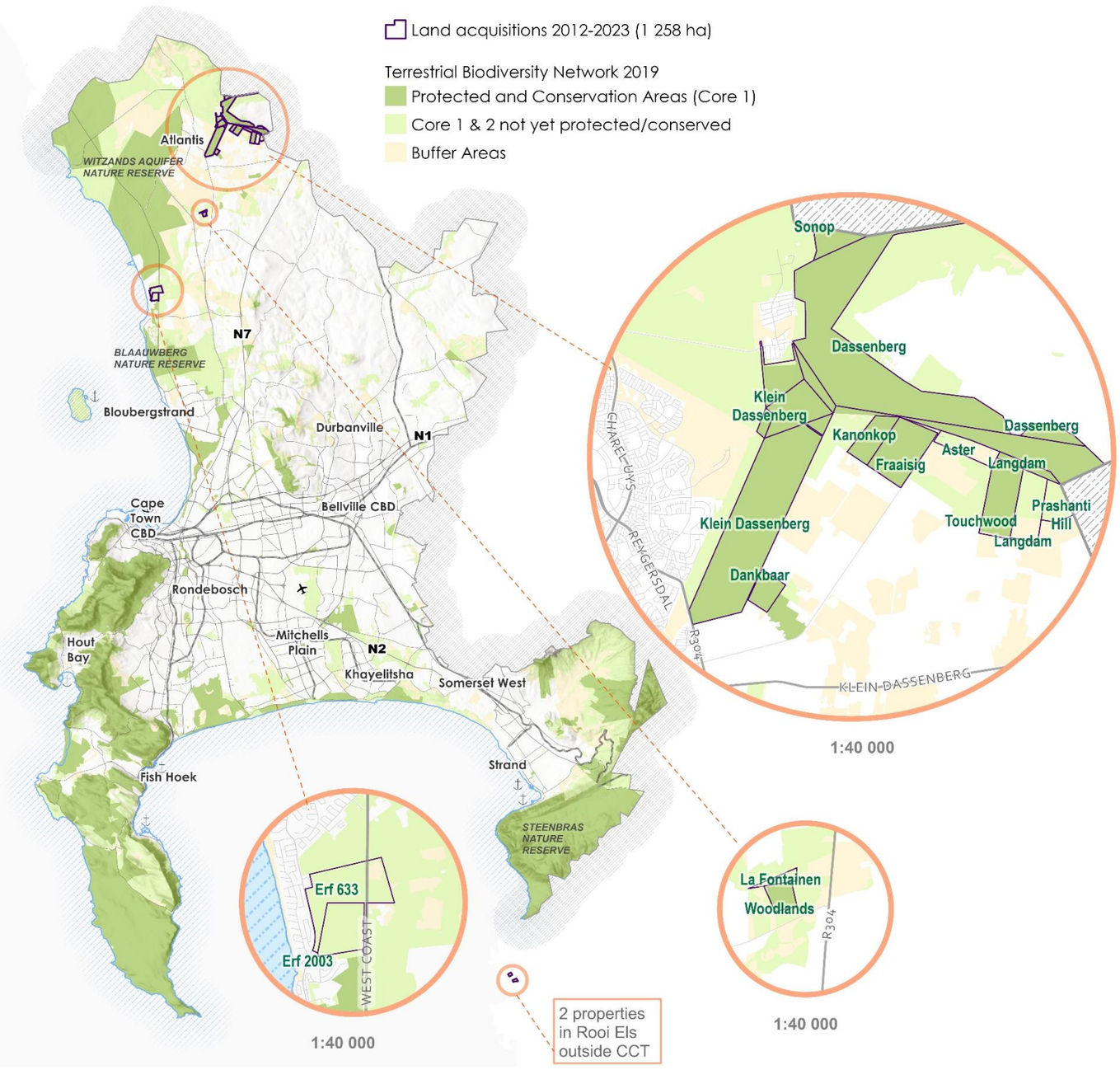
Map B1-b: Areas of interest

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)

Source: Environmental Management, City of Cape Town



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

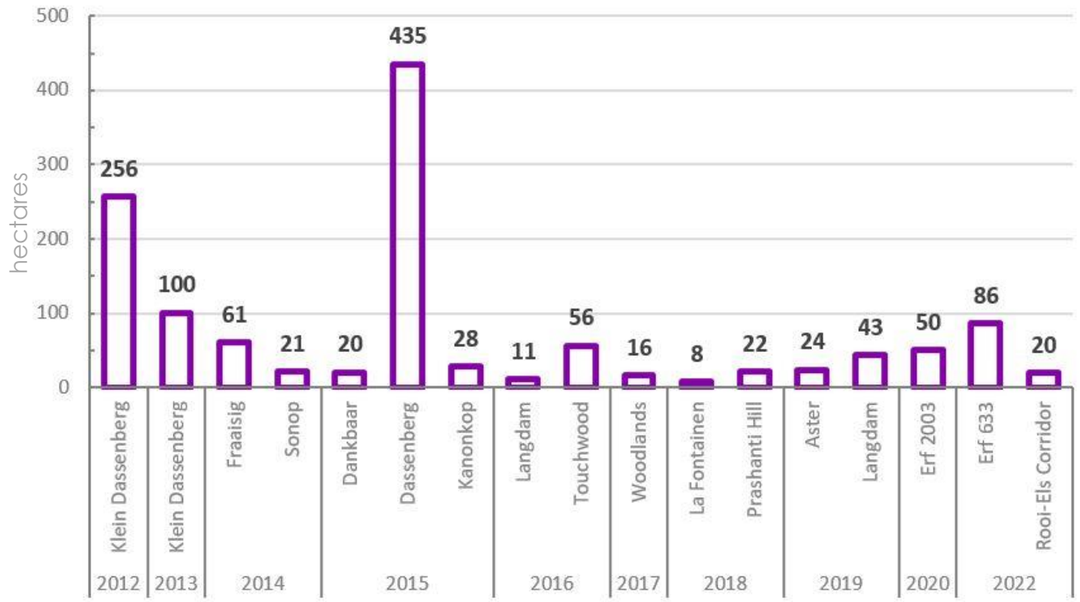
OVERVIEW

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)

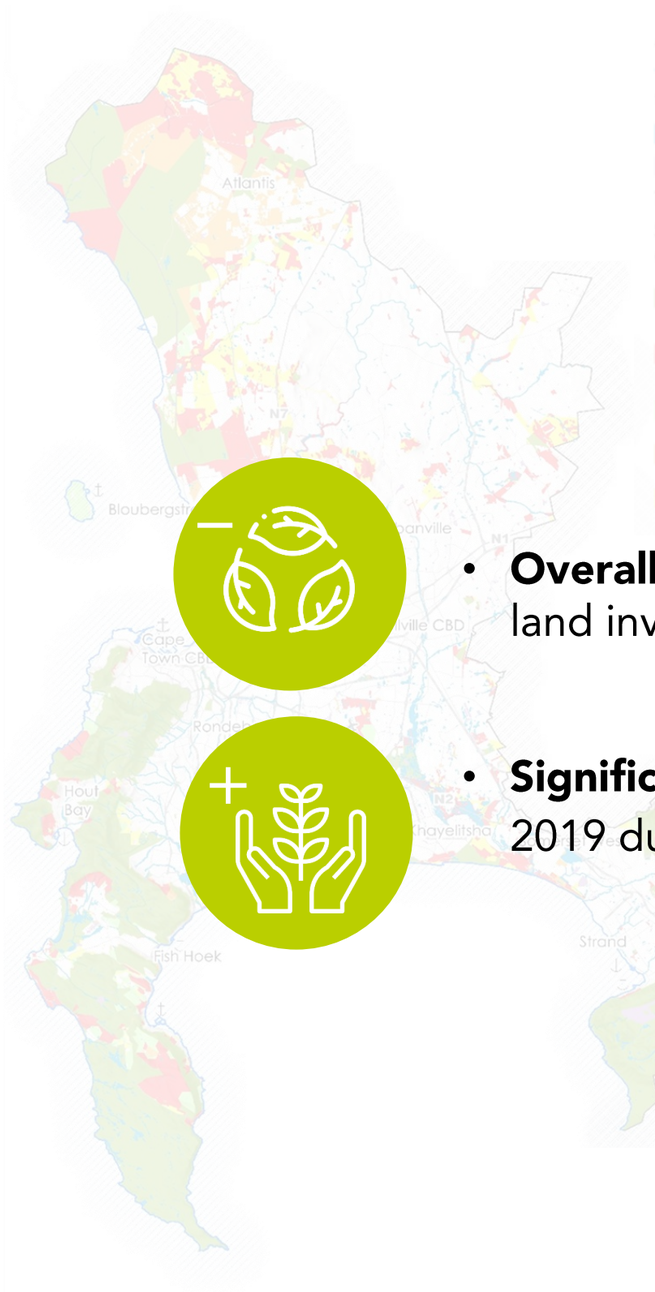
SPATIAL TREND (DISTRIBUTION/PATTERN)

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

BIODIVERSITY NETWORK

KEY TAKE-AWAY TRENDS



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.

- **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.

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 B1a shows the Core BioNet areas. These are either protected or conserved areas, or CBAs which are irreplaceable if lost. They are included as **Critical Natural Assets** in the City's Metropolitan Spatial Development Framework.

OVERALL TREND

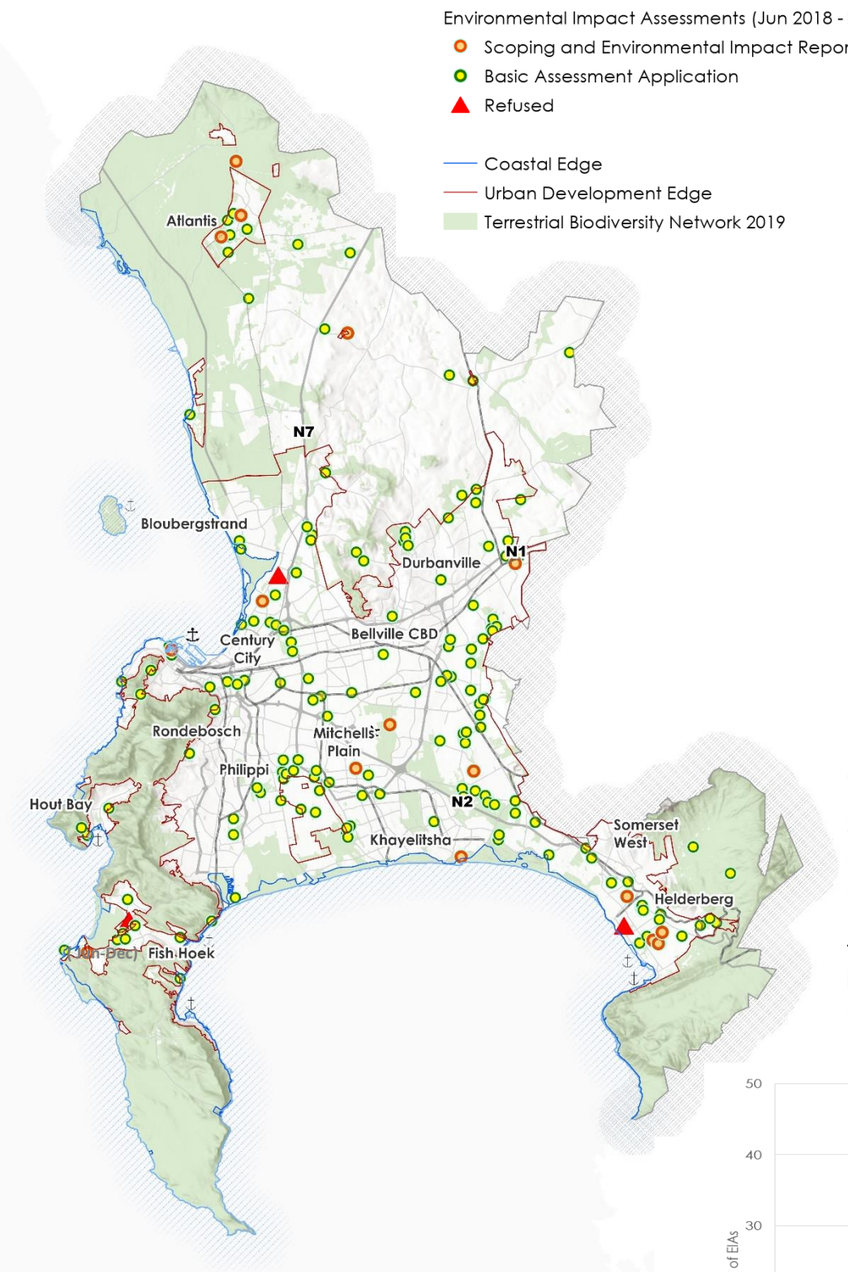
This indicator monitors the pace at which biodiversity is being lost to other land uses and whether City policies and strategies to protect it are effective. It also investigates the rate at which habitat is being protected via proclamation and/or on-site management. The overall trend is a loss of 5% 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).

B.2

NATURAL AND AGRICULTURAL ASSETS
EARLY DETECTION - EIAs

This indicator shows both the number of **Environmental Impact Assessments** authorised or not authorised between June 2018 and Feb 2024 (**excluding those relating to telecommunication masts and base stations)** where Provincial Government was the competent authority

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



Map B2-a:
EIAs (June 2018 – Feb 2024) authorised or refused

YEAR	2018 (Jun-Dec)	2019	2020	2021	2022	2023	2024 (Jan-Feb)
Total EIA Authorised	5	27	34	29	48	35	3
Total EIA Refused	0	0	0	1	1	2	0

Table B2-a: Total no. of EIAs (June 2018 – Feb 2024) 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.

- **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

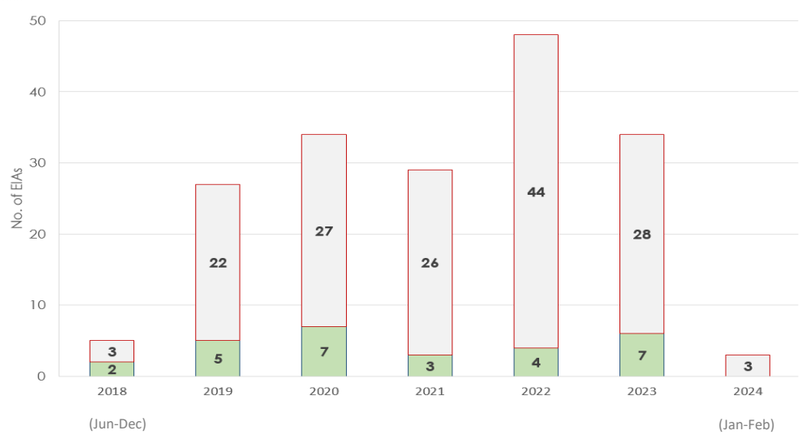
Studying the patterns of EIAs over time helps to determine whether development is sustainable. In terms of **EIAs evaluated by Western Cape Provincial Government**, a total of 181 were authorised between June 2018 and February 2024. Only four were not authorised. Of those authorised, 16 were EIRs and 165 were BAs.

Between 2019 and 2023, the number of EIAs authorised has remained relatively constant other than a peak in 2022 (graph B2-b).

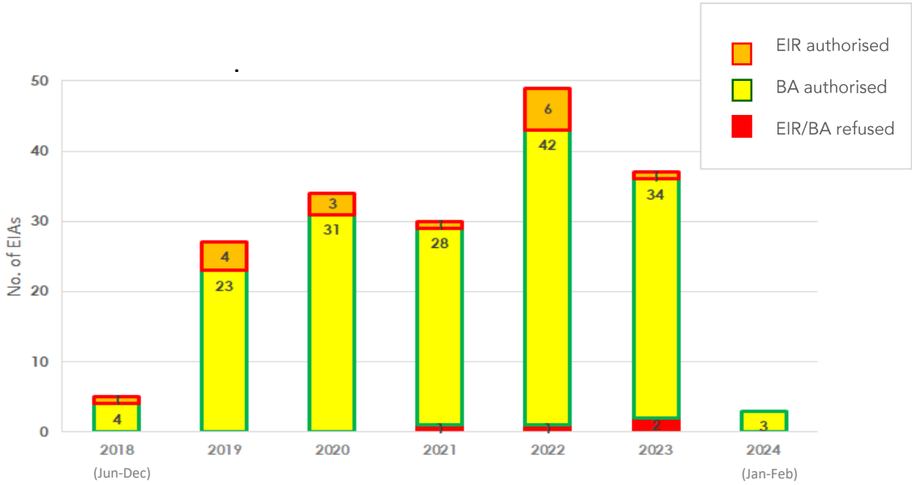
If City planning policies and strategies are working, the expectation is that authorisations for sites located outside the **Urban Development Edge (UDE)** and/or seaward of the **Coastal Edge (CE)** will continue to remain low or decrease (graph B2-a). Note that **EIAs relating to telecommunication 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, particularly related to renewable energy and other green industries. The Helderberg region has had the highest concentration of EIAs authorised.



Graph B2-a: No. of EIAs (BAs + EIRs) authorised (June 2018 – Feb 2024) 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 – Feb 2024)

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.2

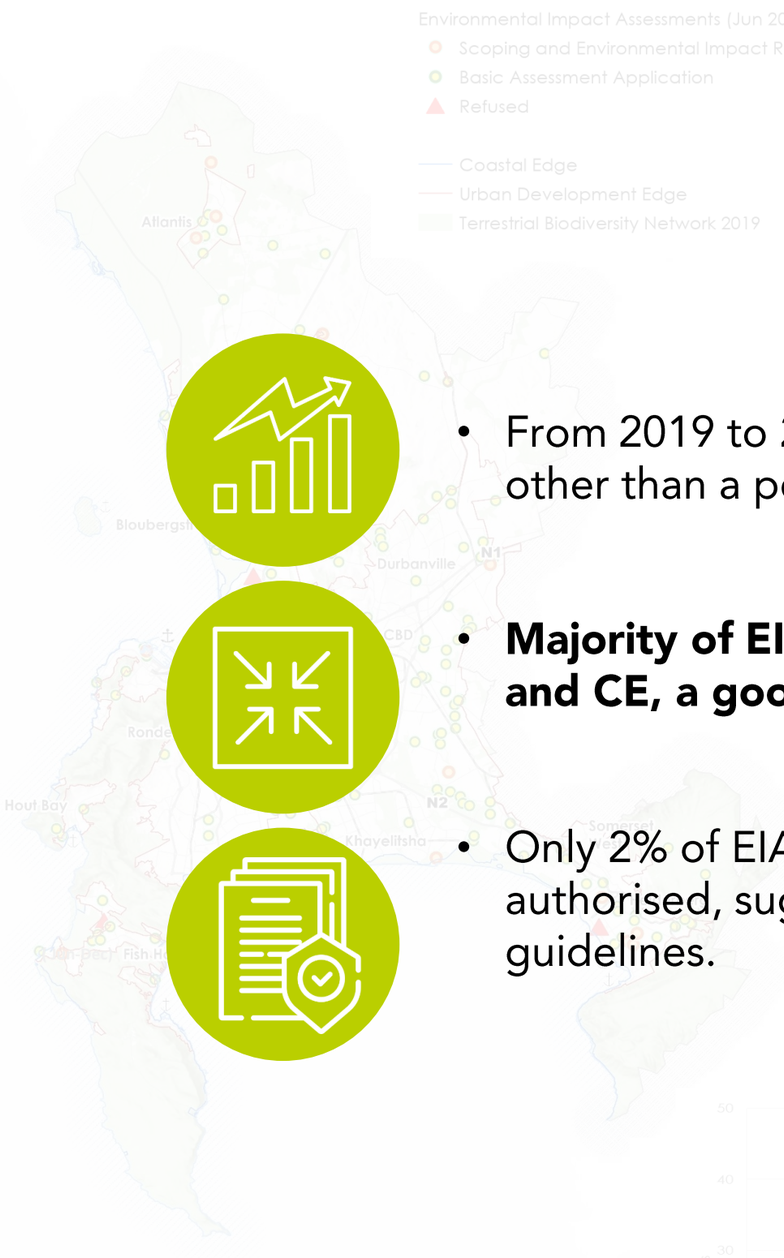
EARLY DETECTION - EIAS

KEY TAKE-AWAY TRENDS

- From 2019 to 2023, the number of EIAs authorised has remained relatively constant other than a peak in 2022.

- **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 (4) between June 2018 and February 2024 were not authorised, suggesting that most applications align with relevant legislative and policy guidelines.



Map B2-a:
EIAs (June 2018 – Feb 2024) authorised or refused

YEAR	2018 (Jun-Dec)	2019	2020	2021	2022	2023	2024 (Jan-Feb)
Total EIA Authorised	5	27	34	29	48	35	3
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Table B2-a: Total no. of EIAs (June 2018 – Feb 2024) 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.

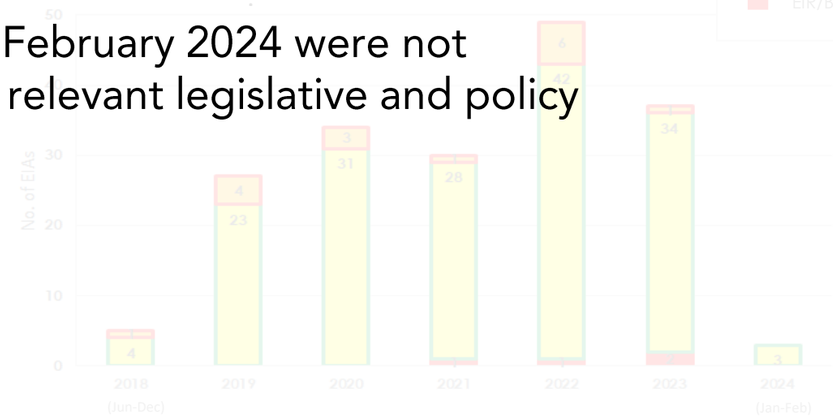
OVERALL TREND

Studying the patterns of EIAs over time helps to determine whether development is sustainable. There were four EIAs refused over this period and a total of 181 authorised. Of those authorised, 16 were EIRs. From 2019 to 2023, the number of EIAs authorised has remained relatively constant other than a peak in 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** [illegible] have been excluded from this driver 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 recently declared a **Special Economic Zone** and **[illegible]** 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.

Graph B2-a: No. of EIAs (BAs + EIRs) authorised (June 2018 – Feb 2024) 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 – Feb 2024)

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.

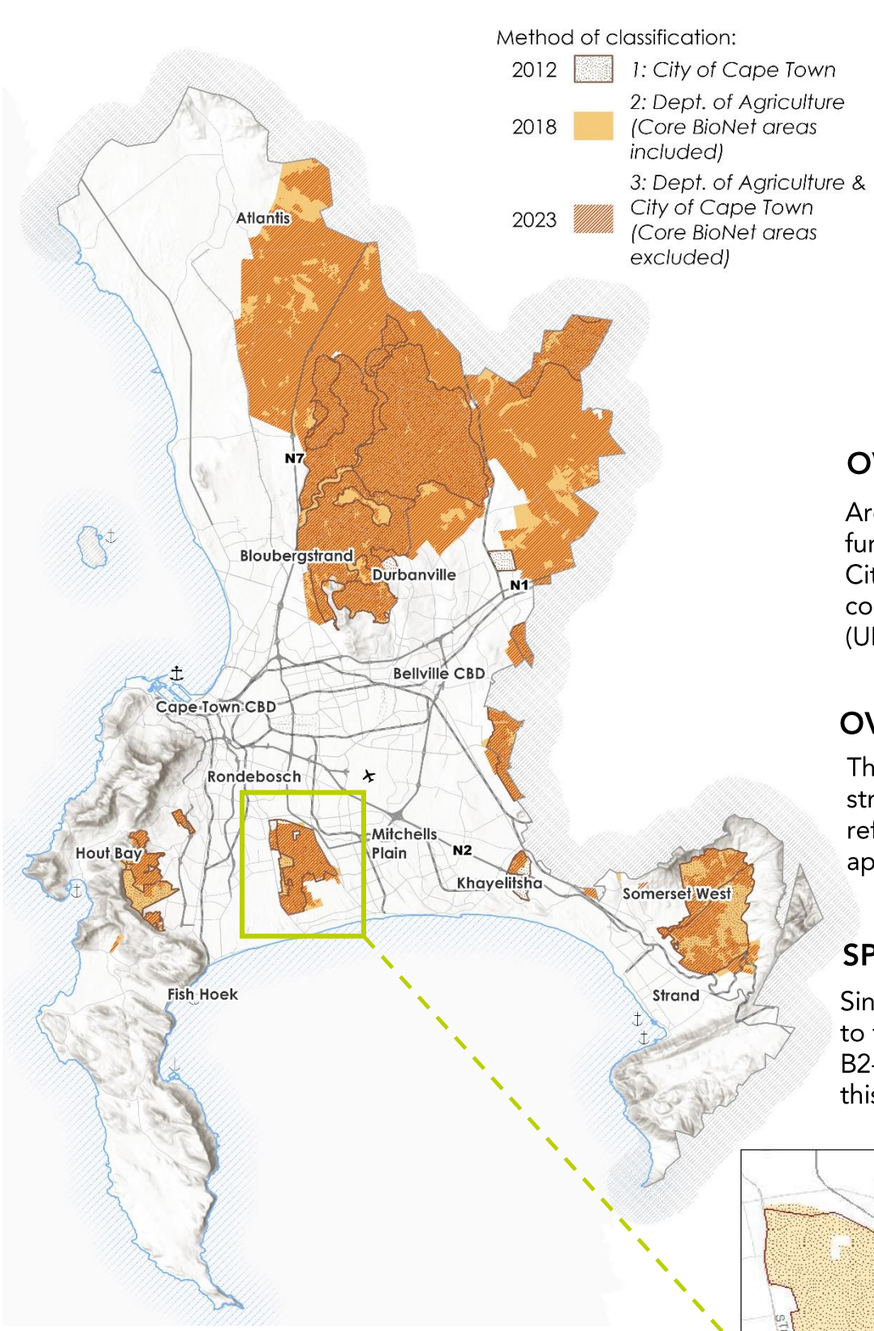
B.3

NATURAL AND AGRICULTURAL ASSETS

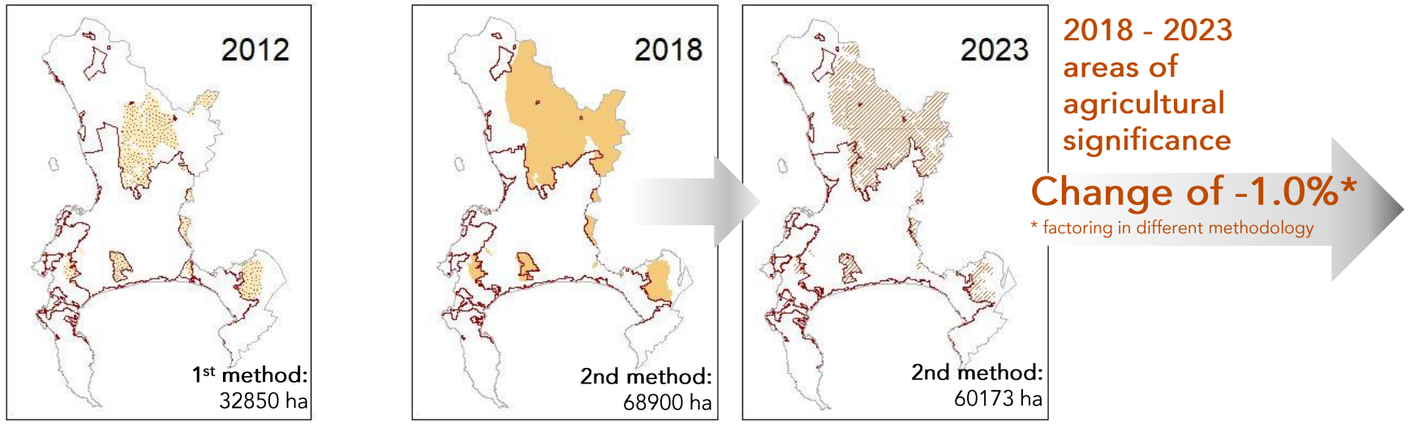
AREAS OF AGRICULTURAL SIGNIFICANCE

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

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

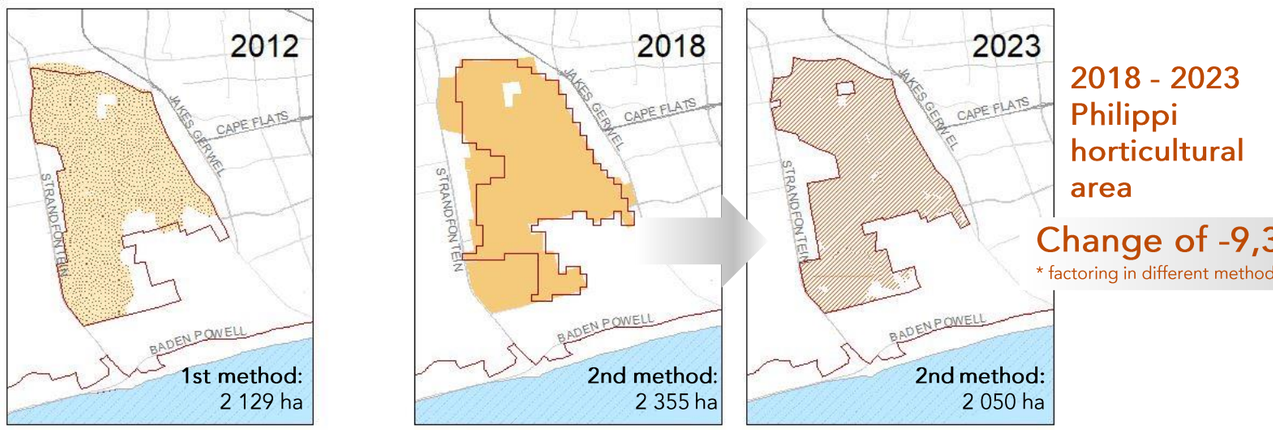
Areas of agricultural significance have unique production, cultural and heritage attributes and are critical for food security and ecosystem function. In 2012, areas of agricultural significance were identified by City of Cape Town based on soil potential only (map B2-a). In 2018, the City and Western 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

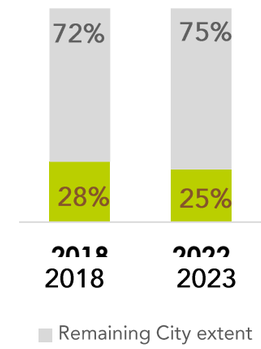
This indicator helps to determine the pace at which agricultural areas are being consumed by other land uses and whether City policies and strategies to preserve them are effective. Roughly 607 ha of the loss and 766 ha of the gain between 2018 and 2023 can be attributed to more refined data capturing 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

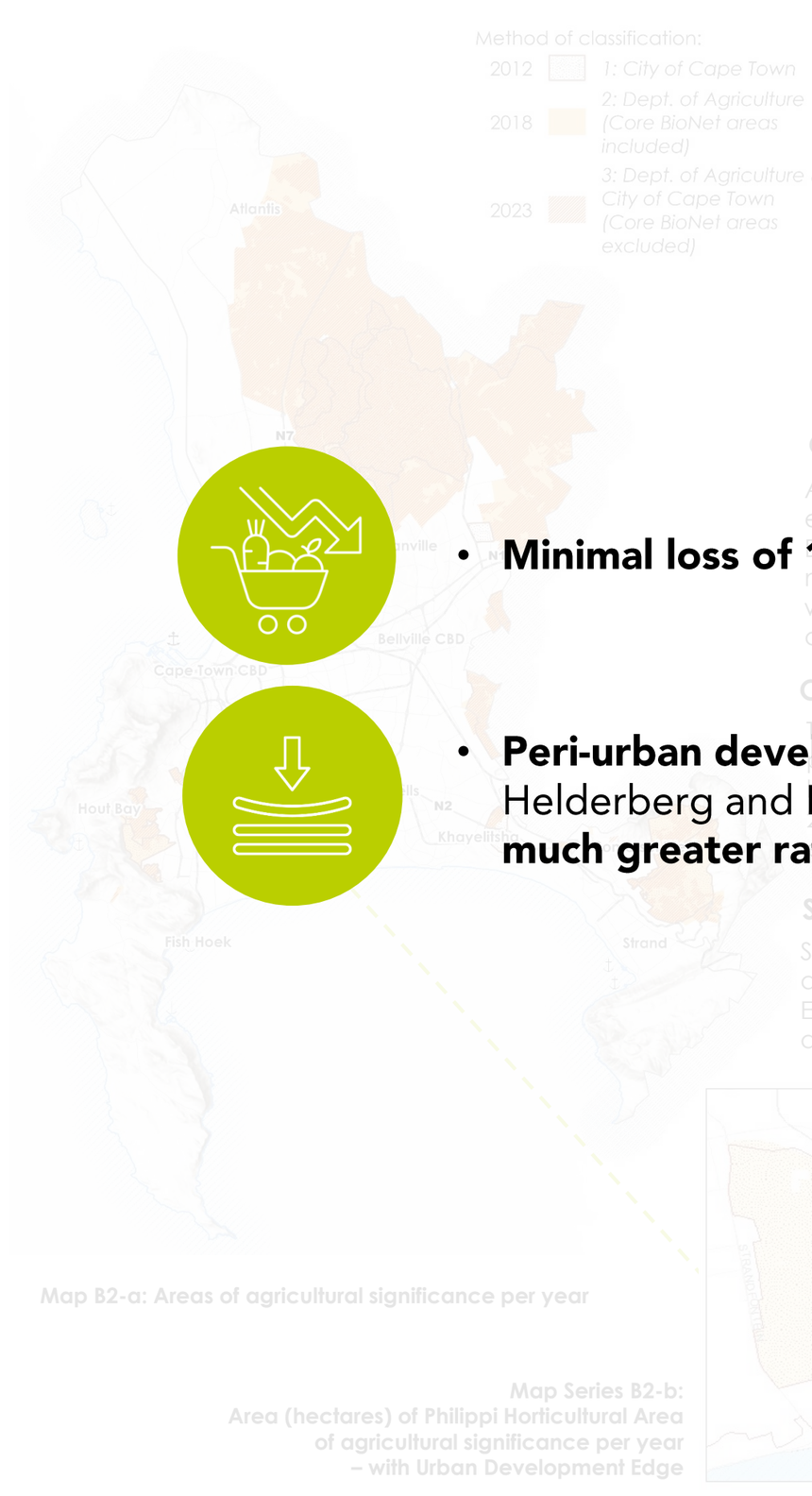


Graph B2-a: Percentage of the City extent per year that is an area of agricultural significance

B.3

AREAS OF AGRICULTURAL SIGNIFICANCE

KEY TAKE-AWAY TRENDS



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

- **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

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 1). 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 & 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 to preserve agricultural areas are working. Overall, the gain between 2018 and 2023 can be attributed to improved data and methods. Taking this into account, the actual loss of agricultural area between 2018 and 2023 (Map Series B2-a) was approximately 1% and a loss of 4%. The area of agricultural significance accounts for 25% of the City

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 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 9 times worse.

C : LAND AND BUILDING DEVELOPMENT

RESIDENTIAL AND NON-RESIDENTIAL LAND USES

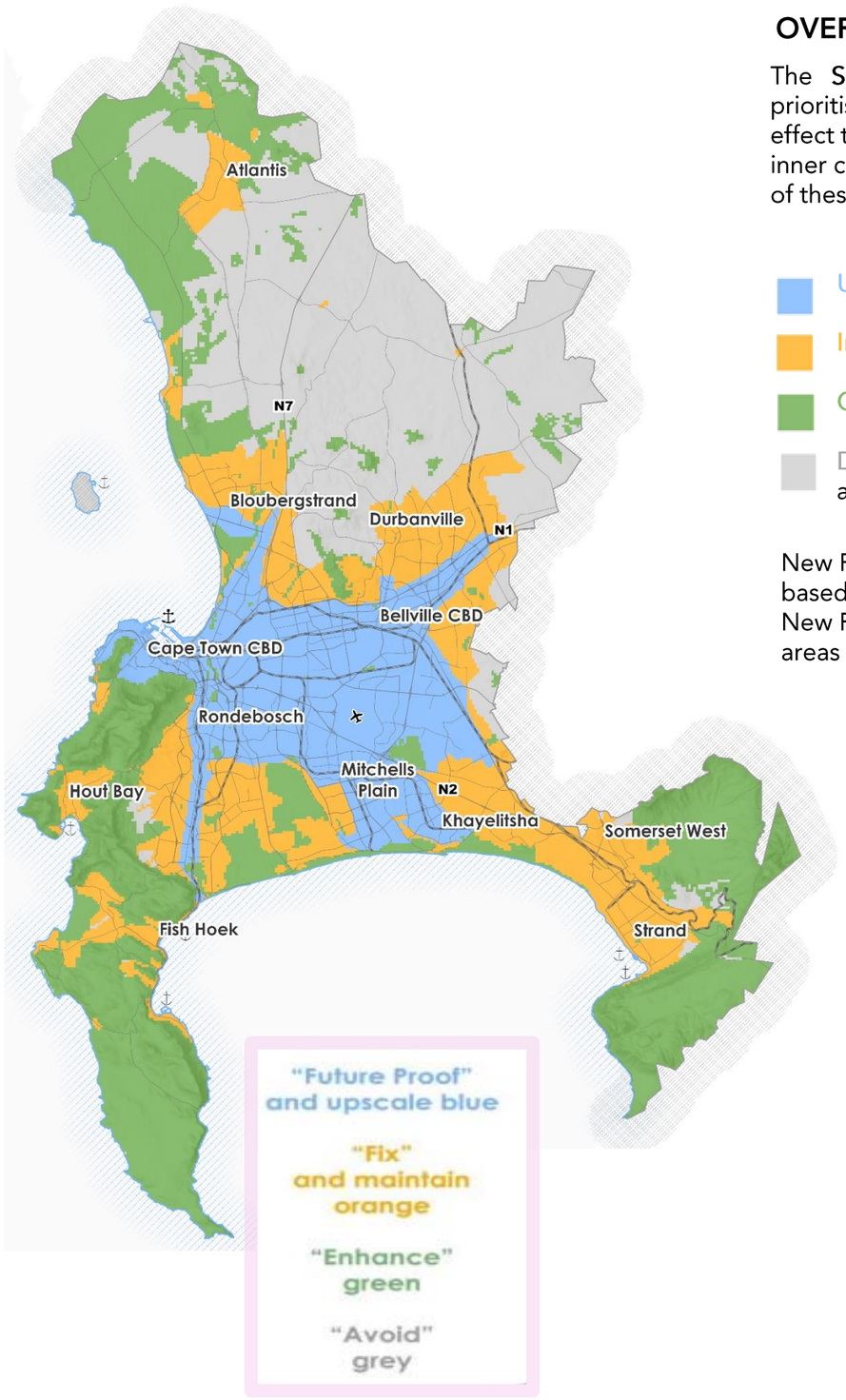
CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

C.1

LAND AND BUILDING DEVELOPMENT
RESIDENTIAL DENSITY WITHIN SPATIAL TRANSFORMATION AREAS

This indicator shows the **gross residential density** as captured in the General Valuations Roll (**formal only**) (2018 & 2022) within the 2023 Spatial Transformation Areas.

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



Map C1-a: Spatial Transformation Areas

OVERVIEW

The **Spatial Transformation Areas (STAs)** as indicated in Map C1a forms the basis of spatial targeting in the MSDF (2023) with the aim of prioritising areas for public and private investment. The STAs are identified at a citywide scale (refer to chapters 4 and 5 of the MSDF) to give effect to the City's spatial vision of inward and upward growth, intensification and densification of development especially within the city's urban inner core and the incremental growth and consolidation area. The four STAs are reflected in map C1-a in Blue, Orange, Green and Grey. Each of these is linked to a set of development rules with suitable land uses promoted within each based as wells as investment principles:

- Urban Inner Core - Upscale land and building optimisation and ensure adequate infrastructure capacity.
- Incremental Growth and Consolidation Area - Fix and maintain bulk and reticulation infrastructure.
- Critical Natural Assets - Enhance sustainable development and conservation of natural assets.
- Discouraged Growth Areas - Avoid investment in conventional urban development and expanding the infrastructure network. Protect agricultural land for food security.

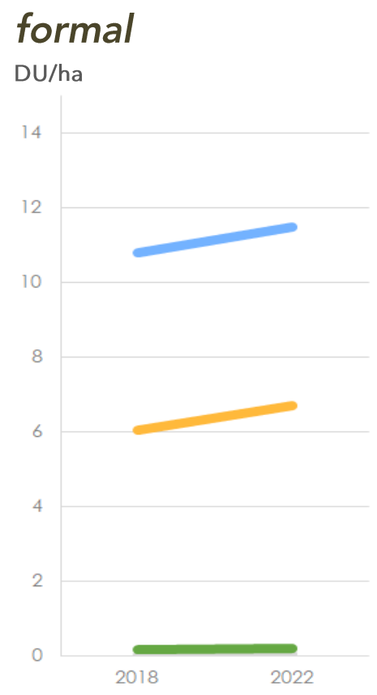
New Residential development is encouraged within the **Urban Inner Core** (UIC) and **Incremental Growth & Consolidation Areas** (IGCA) based on infrastructure availability in the IGCA.
New Residential development is discouraged/prohibited outside of the UDE in the **Discouraged Growth Areas** (DGA) - largely agricultural areas - and where there are **Critical Natural Assets** (CNA).

OVERALL TREND

This study of the residential density per zone helps to understand whether City policies and strategies to shape the City's growth and contain urban sprawl, are effective. Residential density is highest in the zones designated for residential land use - UIC and IGCA – and very low in the zones designated for other land uses - DGA and CNA. When they become available, the 2018 and 2022 Land Use Model densities will be compared as well. These include informal residential dwellings, which results in significantly higher densities. Graph C1-a includes a comparison of formal residential densities as per the latest Valuation Rolls.

SPATIAL TREND (DISTRIBUTION/PATTERNS)

Formal density increased by only 1 du/ha in the UIC (8.5%) and 0.7 du/ha in the IGCA (12.5%) from 2018 to 2022. The IGCA has seen a larger increase in density than the UIC likely due to new development in the northern and eastern growth corridors/ regions of the city on previously vacant land parcels, including but not limited to areas north of Bloubergstrand namely Sunningdale/ Parklands, Kraaifontein & Durbanville North and Somerset West.



Graph C1-a: 2018 & 2022 gross formal residential density (dwelling units per hectare) per 2023 STA zone

C.1

RESIDENTIAL DENSITY WITHIN SPATIAL TRANSFORMATION AREAS

KEY TAKE-AWAY TRENDS

- Residential density is highest in the zones designated for residential land use - UIC and IGCA – and very low in the zones designated for other land uses - DGA and CNA. This is in alignment with spatial policy.

- Formal **residential densities in the Urban Inner Core remained higher than in the the Incremental Growth & Consolidation Areas** indicating the opportunity for further densification.

- From **2018 to 2022 density increased by 8.5 % in the UIC and by 12.5% in the IGCA, but the densities are still very low compared to other similar metropolitan areas.**

Map C2a-a: Spatial Transformation Areas

Graph C2a-a: 2018 & 2022 gross formal residential density (dwelling units per hectare) per 2023 STA zone

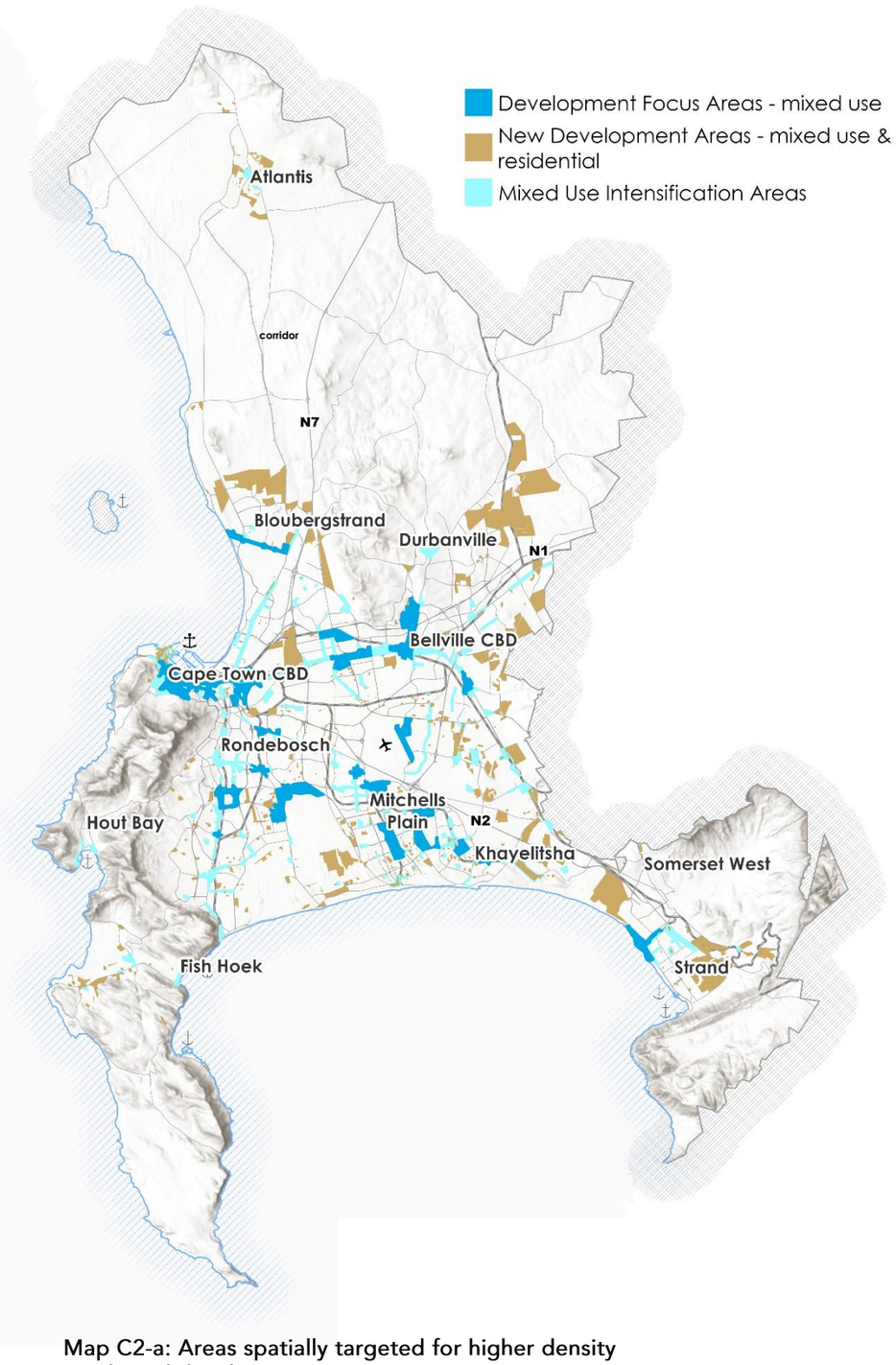
C.2

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL DENSITY WITHIN SPATIALLY TARGETED AREAS

This indicator shows the **gross residential density** as captured in the General Valuations Roll (**formal only**) (2012, 2015, 2018, 2022) within areas spatially targeted for development in 2023.

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



Map C2-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**" (STAs) (map C2-a). They include the following categories **where policy would currently support residential development**:

- **Development Focus Areas** (DFAs) (designated for mixed use of current built up areas, earmarked for re-development)
- **New Development Areas** (NDAs) (designated for residential & mixed use of vacant and/ or underutilised land)
- **Mixed Use Intensification Areas** (MUIAs) (designated for higher mix up of land uses within existing urban areas)

Refer to *i. Key Terms and Definitions* in the report for a description of each. The gross density shown in **Dwelling Units per hectare (DU/ha)** is cumulative for all areas designated within each of the above categories across the entire City. Although the statistics generated are for 2012, 2015, 2018 and 2022, the 2023 STAs were used as the spatial unit as their boundaries were only delineated more recently.

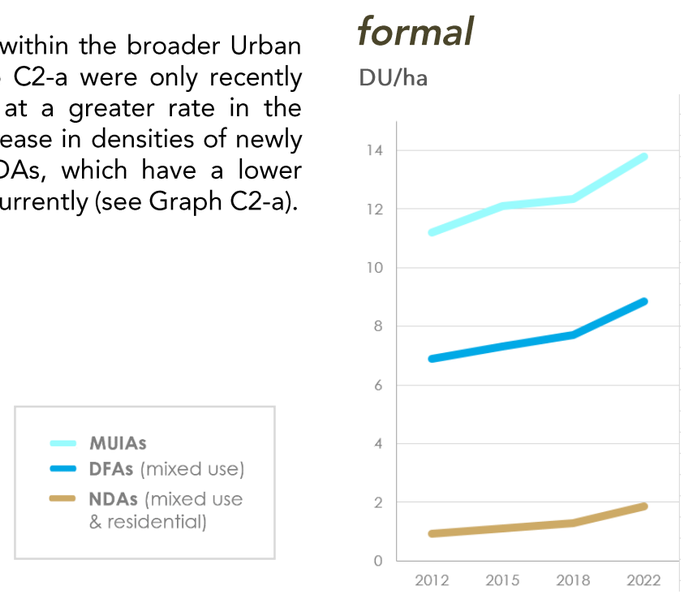
OVERALL TREND

The aim is to understand whether programmes to increase residential density in these targeted areas are leading to actual results. Between 2012 and 2022, there was a gradual increase in residential density in all of the STAs and the rate at which that took place increased in 2018. Once available, the Land Use Model densities will be compared as well. These include informal residential dwellings, which results in significantly higher densities. For the moment the graph below reflects only formal units are recorded in the Valuation Rolls.

SPATIAL TREND (DISTRIBUTION/PATTERNS)

The STAs are the result of fine-scale planning for development within the broader Urban Extent (see *indicator A.1*). As the categories depicted in Map C2-a were only recently delineated, residential densities can be expected to increase at a greater rate in the coming years than neighbouring areas because of a general increase in densities of newly approved and implemented projects. In particular, in the NDAs, which have a lower density of formal residential units than the MUIAs and the DFAs currently (see Graph C2-a).

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 is therefore also useful for informing the review and delineation of STAs in the future.



Graph C2-a: 2018 & 2022 residential density (formal) within 2023 spatially targeted areas

C.2

RESIDENTIAL DENSITY WITHIN SPATIALLY TARGETED AREAS

KEY TAKE-AWAY TRENDS

- Between 2012 and 2022, there has been a gradual increase in residential density in all Spatially Targeted Areas, with the rate of densification increasing since 2018.
- The gross density in all the targeted areas, for the City in general, are still less than 14 du/ha.
- Note the density on corridors and nodes (Map C3-b) ranging well above 75u/ha.
- There is currently a higher density of formal residential units in the Mixed Use Intensification Areas and the Development Focus Areas than in New Development Areas. **MUIAs increased the largest by 12% or 1.4 du/ha (from 2018 to 2022).** This is a good reflection of spatial policy, as MUIA's represent the most accessible locations in the City.

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

Graph C2b-a: 2018 & 2022 residential density (formal) within 2023 spatially targeted areas

C.3

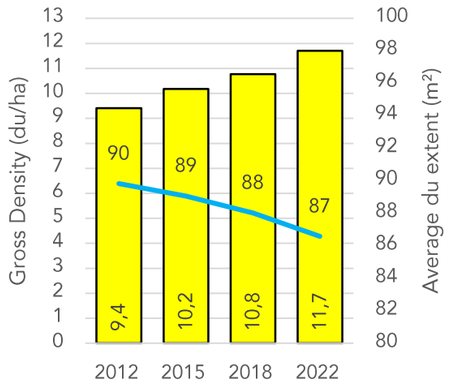
LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY

This indicator shows change in **gross residential density** over time (2012-2022) as captured in the City's General Valuation Rolls (**formal dwellings** only, excluding collective living quarters). 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, 2018, 2022

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



OVERALL TREND

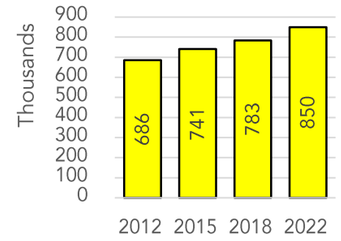
Densification is observed almost everywhere in the city. It occurs in different forms and at varying densities in different areas.

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) as well as 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 (not included here).

Trends observed from the maps depicted in this report include:

- The largest increase in gross residential density between 2012 and 2022 occurred in the Metro South East, and recorded the highest densities (other than the CBD) as of 2022.
- Other significant increases in density between 2012 and 2022 occurred in key development corridors (mainly the Metro South East Corridor, southern end of the Southern Corridor), nodes (CBD, Wynberg-Kenilworth-Claremont, Khayelitsha CBD, Kraaifontein CBD and Somerset West CBD) and new development areas (Rivergate, Parklands, Sunningdale, Fisantekraal, etc.).



Graph C3-b:
Formal residential dwellings

GENERAL ANALYSIS

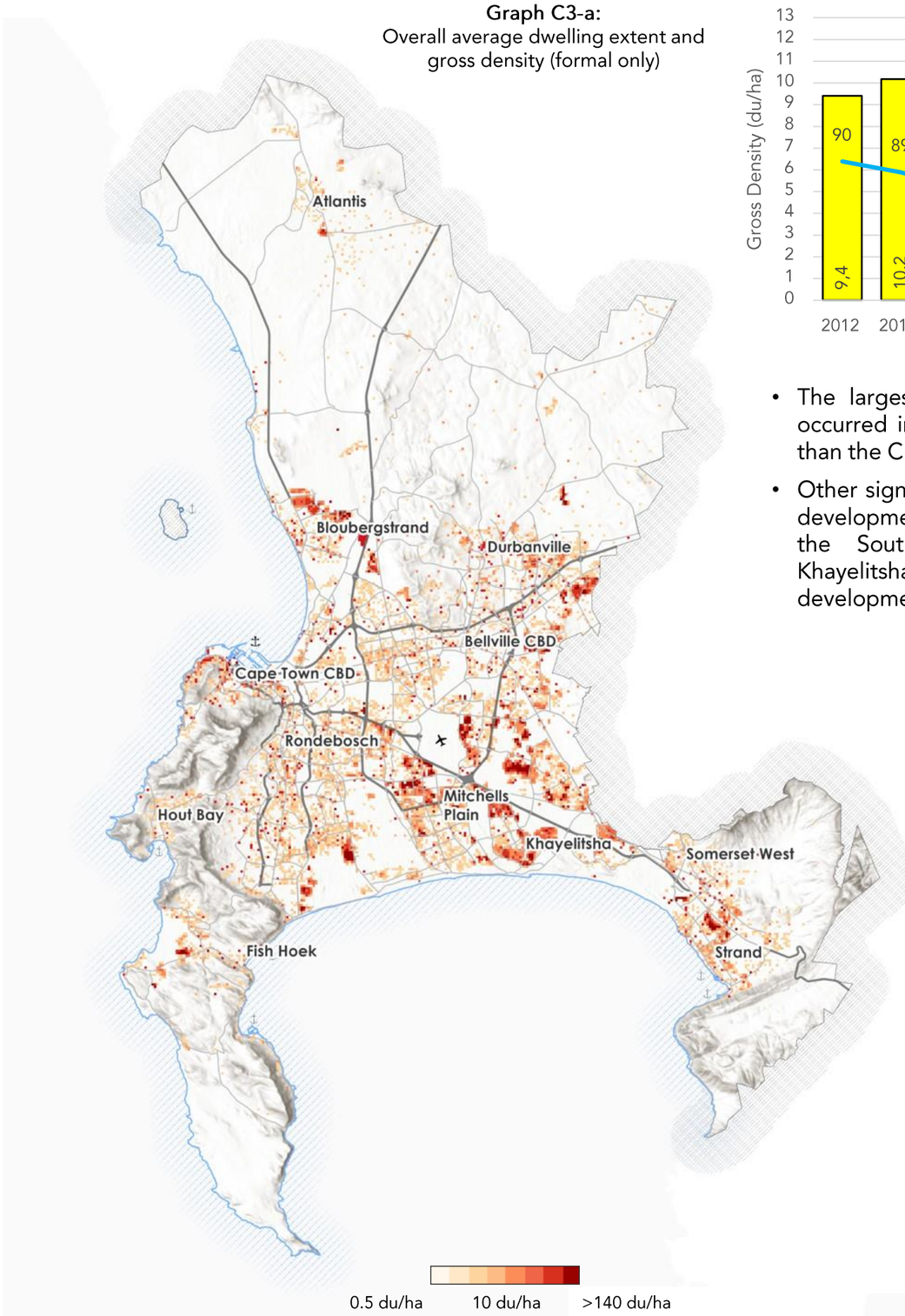
Map C3-b shows the 2022 residential density of formal dwellings (expressed in dwelling units per hectare or DU/ha), i.e. the spatial distribution of dwelling units.

Map C3-a on the left shows the difference in gross residential density (du/ha) between 2012 and 2022, in other words where densification has taken place to arrive at the density depicted on map C3-b.

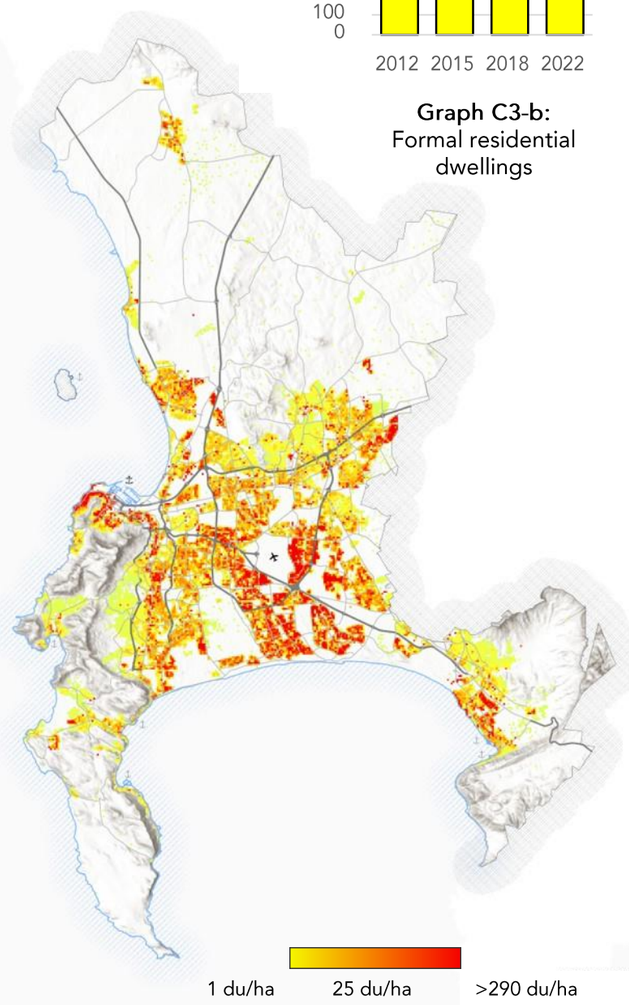
The number of formal residential dwellings increased from ±686,000 in 2012 to ±741,000 in 2015, ±783,000 in 2018 and ±850,000 in 2022 (see graph C3-b). It is of interest to note that the average unit size is ±88m² and that the gross density exhibits a clear increase across the city, albeit at varying rates (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 Somerset-West area, and locations along development corridors to Fisantekraal and north of Rivergate.



Map C3-a: Change in gross residential density (2012 to 2022)



Map C3-b: Gross residential density (2022)

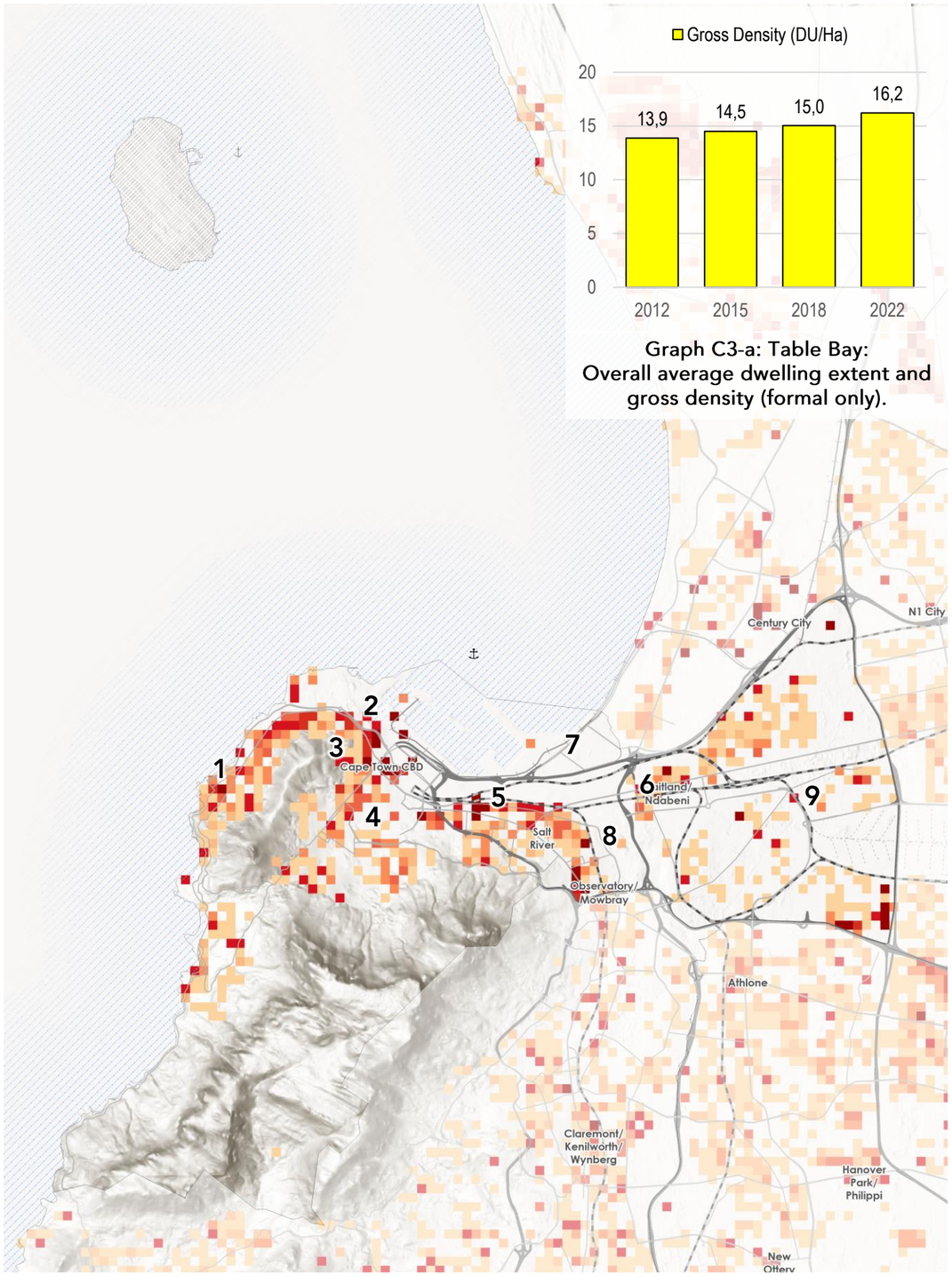
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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, 2018 and 2022



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

Map C3-a: Table Bay: Change in gross residential density (2012 to 2022).

DISTRICT LEVEL ANALYSIS

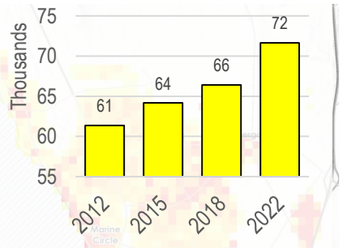
TABLE BAY DISTRICT (A)

ALIGNMENT TO SPATIAL POLICY

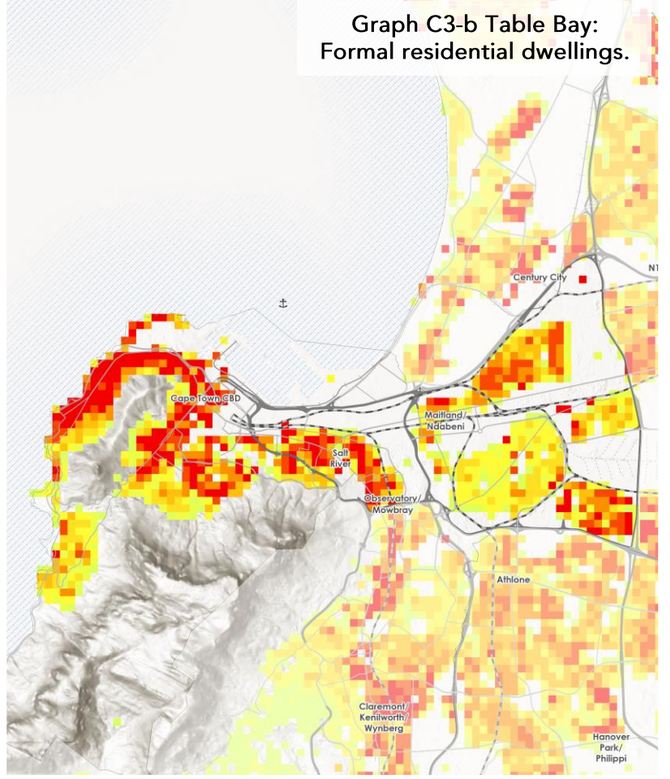
Generally the residential / dwelling densification observed between 2012 and 2022 (Map C3-a) is in line with spatial policy. These locations are well located close to public transport and high concentrations of employment opportunities and business areas. It's also areas of very high property values and taxes and hence owners strive to optimise development within existing rights and even applying for exceedances to optimise land development. This district, which also includes the Cape Town CBD has seen quite a large number of building conversions away from office/ commercial to residential post coved as associated with decreased demands for office space.

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 Voortrekker Road Corridor. Prime – apartment building, conversion from industrial – one developer converting entire Maitland Station precinct from industrial to residential.
7. Paarden Eiland: Although there were several approved applications for land use and building conversion of industrial to mixed use (including residential) along Marine Drive in Paarden Eiland, the developments have not commence or are not completed and hence not visible in the Valuations Roll (2022).
8. Two Rivers Urban Park: River Club, mixed use infill in the Two Rivers Urban Park area approved but construction ongoing and not visible on the map as yet.
9. Conradie Park: This very large inner city private partnership project for residential and mixed use is ongoing, but not yet fully visible and incorporated into the Valuation Rolls reflected in 2022.



Graph C3-b Table Bay: Formal residential dwellings.



Map C3-b: Table Bay: Gross residential density (2022).

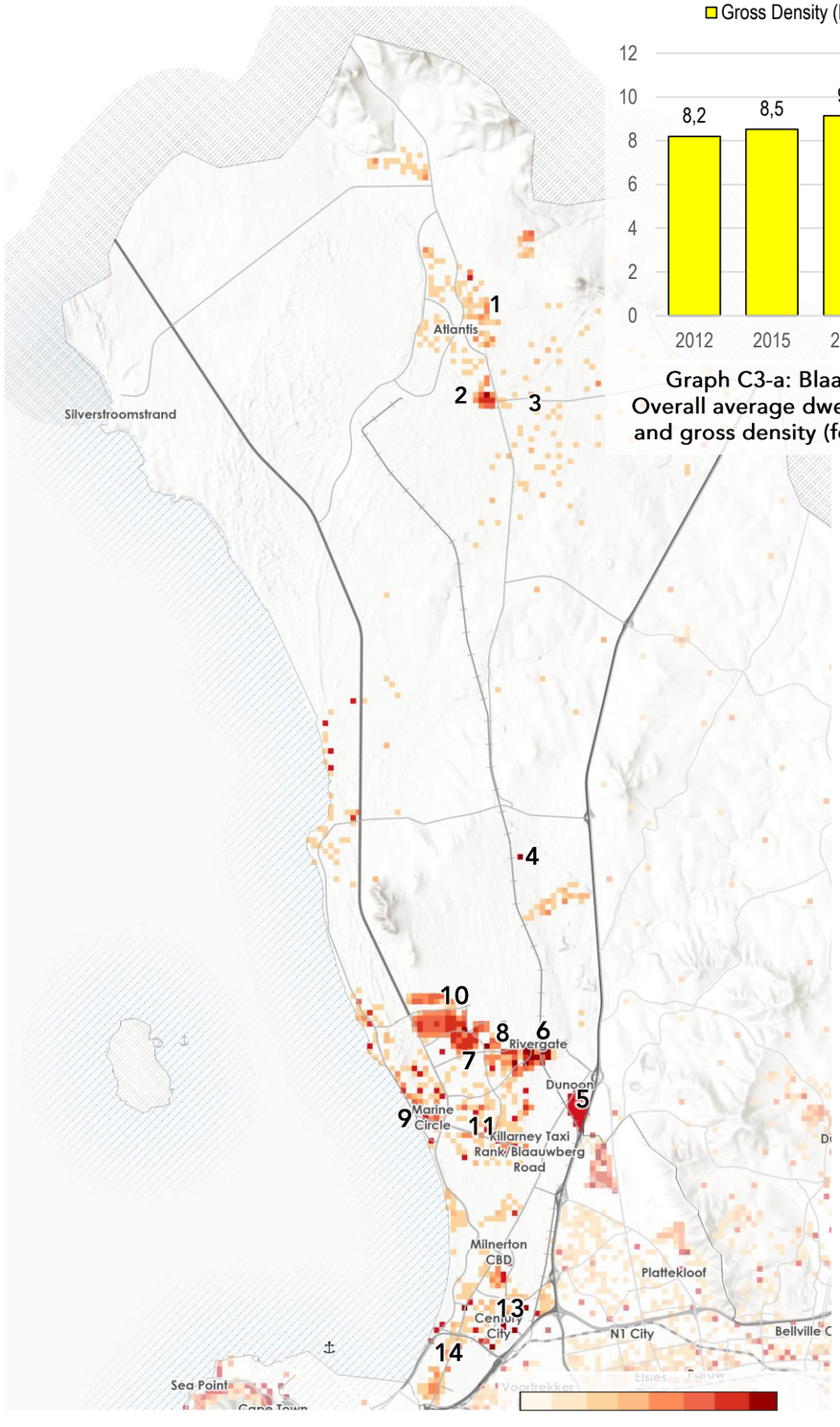
C.3

LAND AND BUILDING DEVELOPMENT

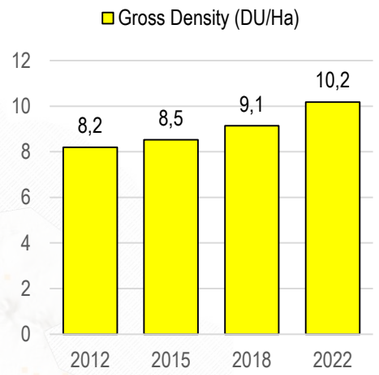
FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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, 2018 and 2022



Map C3-a: Blaauwberg: Change in gross residential density (2012 to 2022).



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

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

LOCAL LEVEL TRENDS

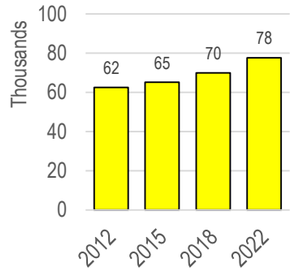
1. Atlantis – low to medium increases associated with government housing projects.
2. Witsand north – high increase in density due to housing project.
3. Low density but widespread throughout the Klein Dassenberg smallholding area.
4. Wolwerivier TRA established and increase in residential construction on Morninstar Smallholdings.
5. Dunoon – redevelopment of RDP units to micro developments, small scale rental reflecting 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), **no** 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 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 – High levels of 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

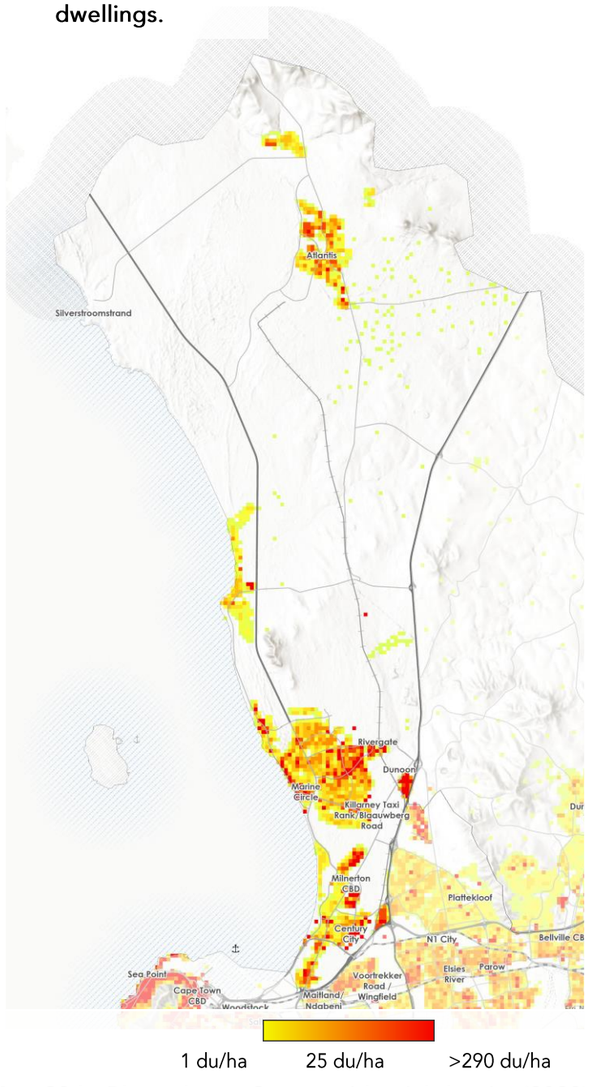
It is not obvious if the increases in density is in line with spatial policy in this district. Incremental densification responding to market dynamics and intrinsic locational characteristics e.g. beachfront is hypothesised to play a larger role.

<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).
- Mass incremental and micro-unit development in Du Noon, Joe Slovo Park and Summer Greens are exceeding policy densities and puts significant strain on the infrastructure network, but fulfils a highly demanded form of rental accommodation.
- 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.



Graph C3-b: Blaauwberg: Formal residential dwellings.



Map C3-b: Blaauwberg: Gross residential density (2022).

C.3

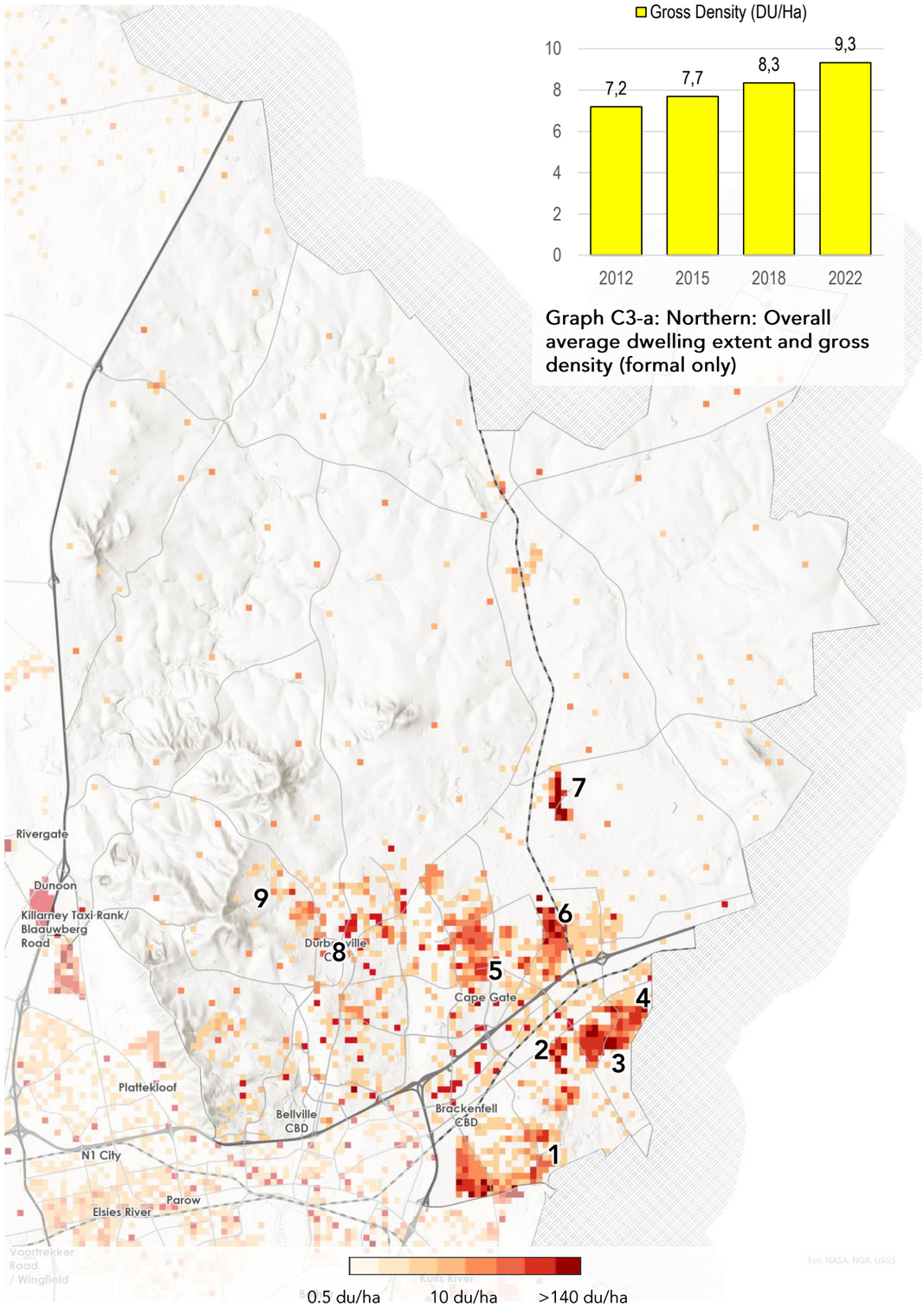
LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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, 2018 and 2022

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



Map C3-a: Northern: Change in gross residential density (2012 to 2022).

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)

LOCAL LEVEL TRENDS

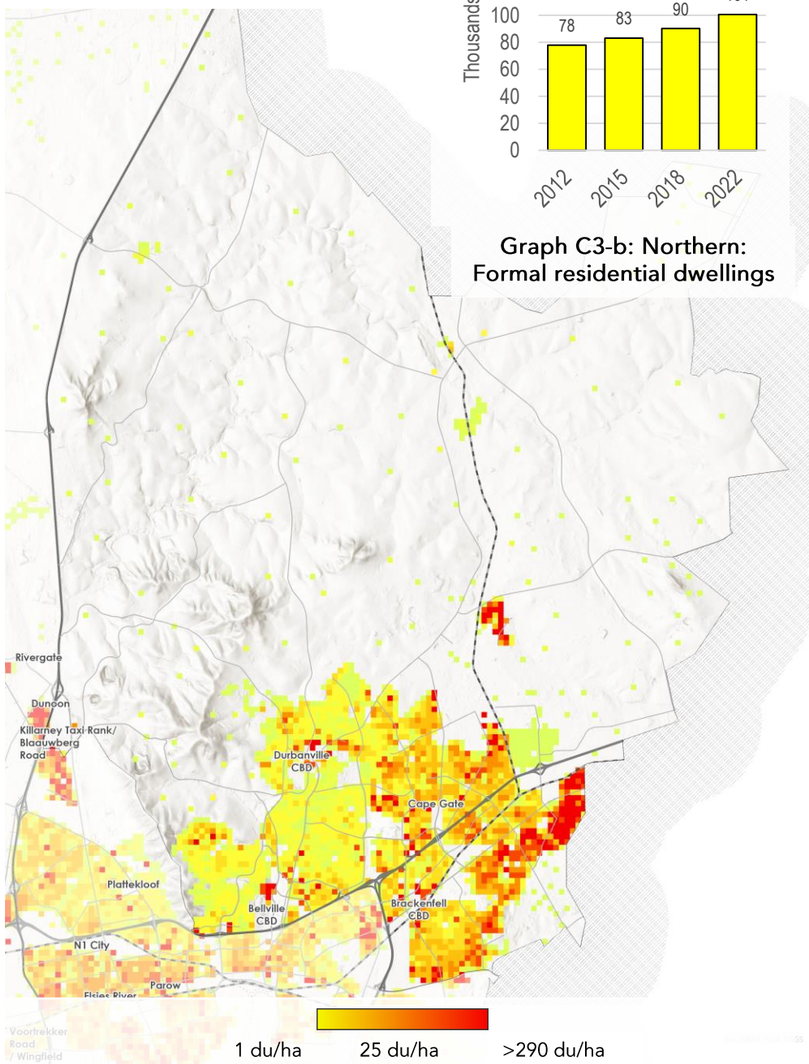
Primarily the trends (densification) in the Northern District relate directly to proposals made in the approved District Plans (mostly NDA's). However, the impact can also be ascribed to incremental densification as described in the Densification Policy, especially in lower-density older single residential areas where small-scale subdivisions and resonings General Residential zoning 1 (flats) occurred. Densification in areas such as Wallacedene may be ascribed not to official redevelopment 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, and over the last decade, those families constructed houses which were recorded in the Valuation Rolls.

1. Kruis Road smallholdings: Brackenfell; Identified as NDA in District Plans. Mostly GR1 developments (infill).
2. Scottsdene: Subsidised and social housing development.
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 the 2023 District Plans. Now occupied by informal structures (illegal).
5. Infill development of the Langeberg smallholdings, along Okavango Road and further north in Pinehurst. Land use approvals already in place.
6. Buh-Rein estate. NDA in 2023 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. Greenville, Fisantekraal: Subsidised residential in line with NDA in 2012 and 2023 District Plans.
8. Durbanville secondary CBD: Increase in densities (primarily GR1) in line with sub-district development guidelines(both 2012 and 2023 District Plans.
9. Lower density development in Clara-Anna Fontein. Land use approvals in place – implementation underway.

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 & 2023), i.e. mainly in the Durbanville CBD and NDA's. However, the Densification Policy also played a role, in terms of incremental densification in older, established and lower density residential areas.

Graph C3-b: Northern: Formal residential dwellings



Map C3-b: Northern: Gross residential density (2022)

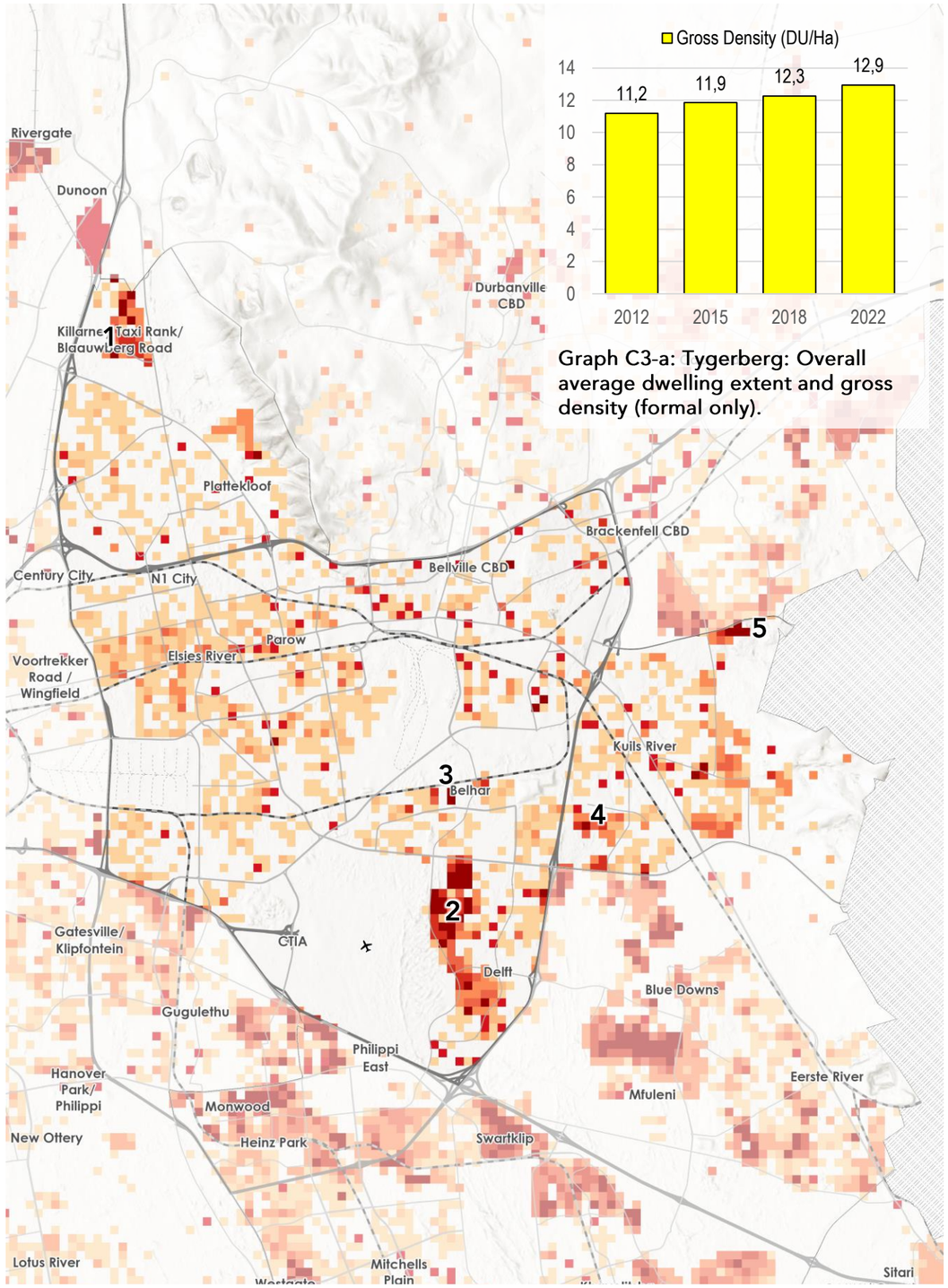
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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, 2018 and 2022



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

0.5 du/ha 10 du/ha >140 du/ha

Map C3-a: Tygerberg: Change in gross residential density (2012 to 2022).

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)

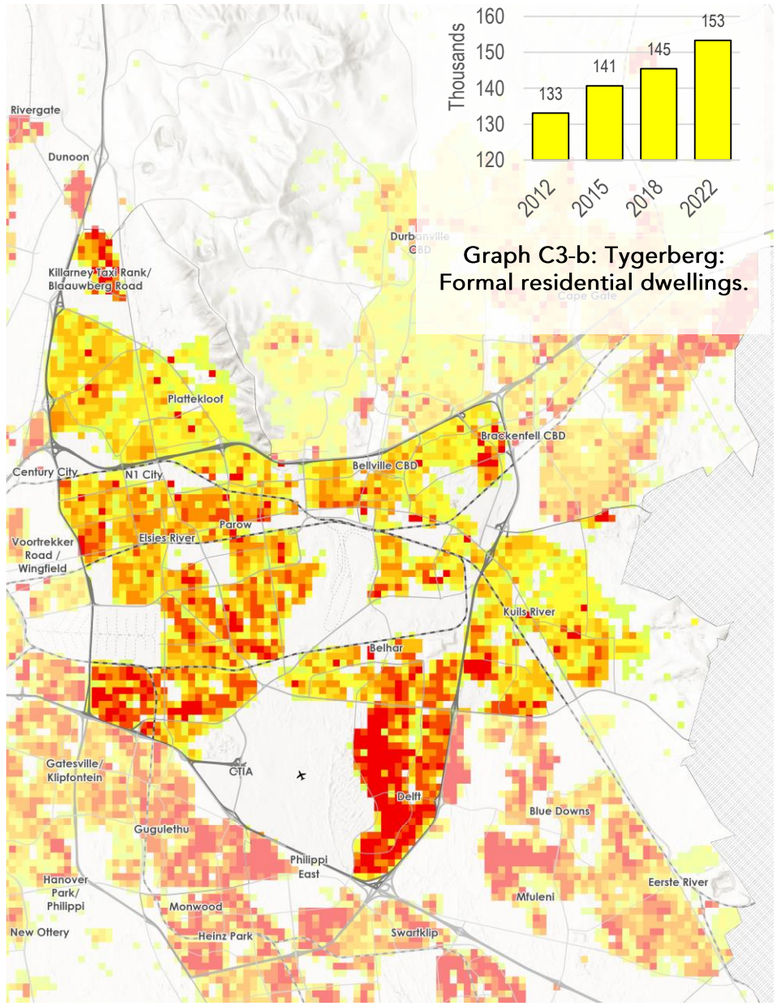
ALIGNMENT TO SPATIAL POLICY

Significant increases in density between 2012 and 2022 occurred in the historically lower-income level areas (i.e. southern part of the district) characterised by higher residential densities. This trend is aligned to targeted densification in the Urban Inner Core as per the spatial policy and can be interpreted as being incremental in nature. These areas are well serviced with public transport.

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 being constructed - with the majority being group housing and apartments.
2. Delft shows a high increase in residential density along the western side – various subsidised human settlement projects were implemented over the past decade (Symphony Way, Delft Phase 7 – 9).
3. Area around Unibell station in Belhar shows moderate density increase as a result of various student accommodation, apartments and group housing developments.
4. Phase 3 of Kalkfontein human settlement project completed and visible on Valuation Roll.
5. Hazendal area along Bottelary Road consists of general residential projects being implemented at high densities.



Graph C3-b: Tygerberg: Formal residential dwellings.

1 du/ha 25 du/ha >290 du/ha

Map C3-b: Tygerberg: Gross residential density (2022)

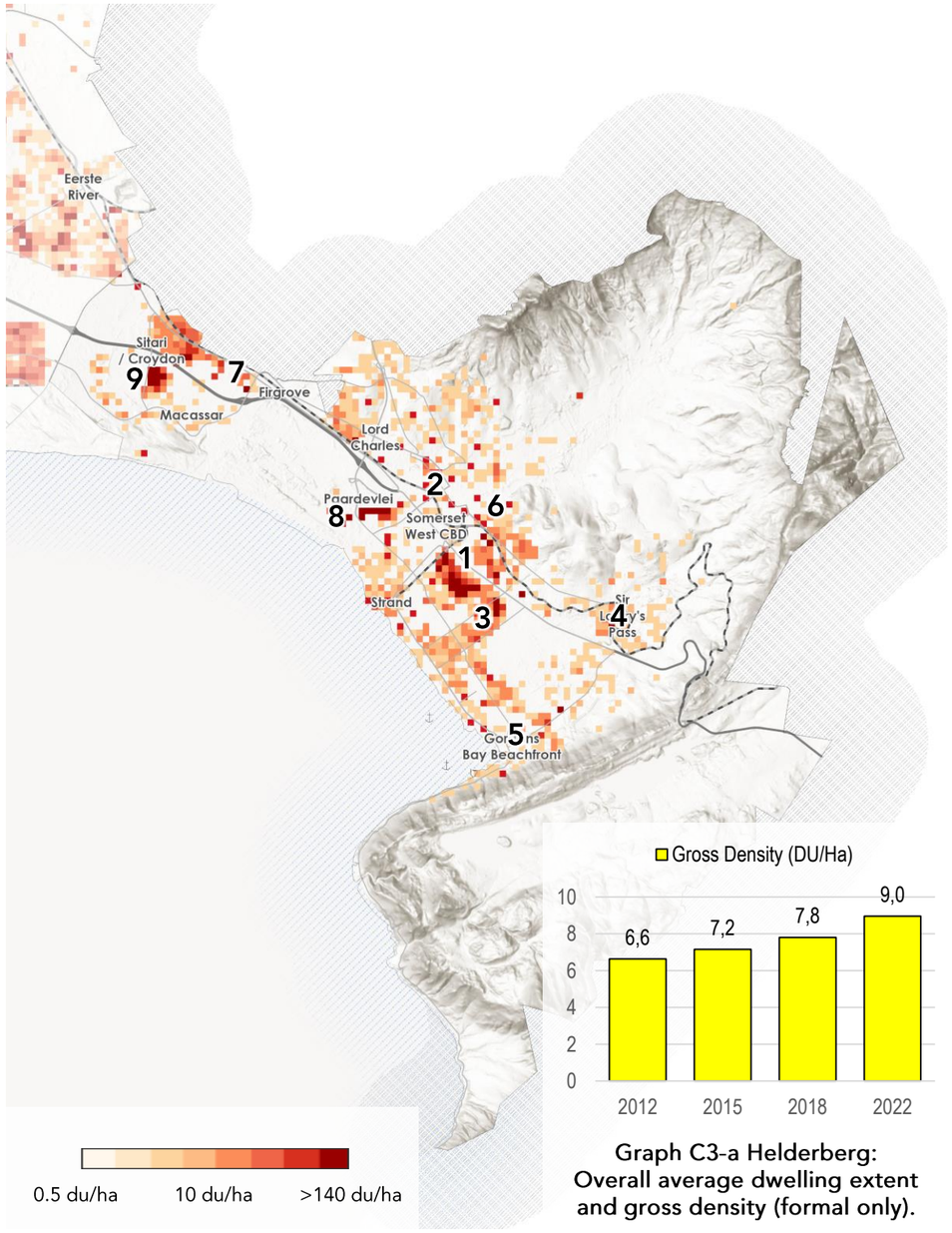
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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, 2018 and 2022



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

Map C3-a: Helderberg: Change in gross residential density (2012 to 2022).

ALIGNMENT TO SPATIAL POLICY

Significant increases in density between 2012 and 2018 occurred in various parts 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 but spikes of new development at planned densities.

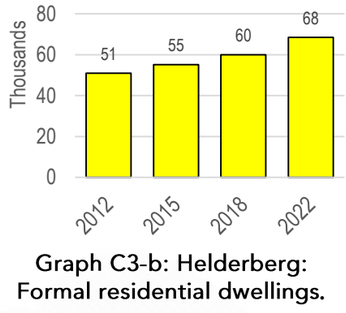
DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)

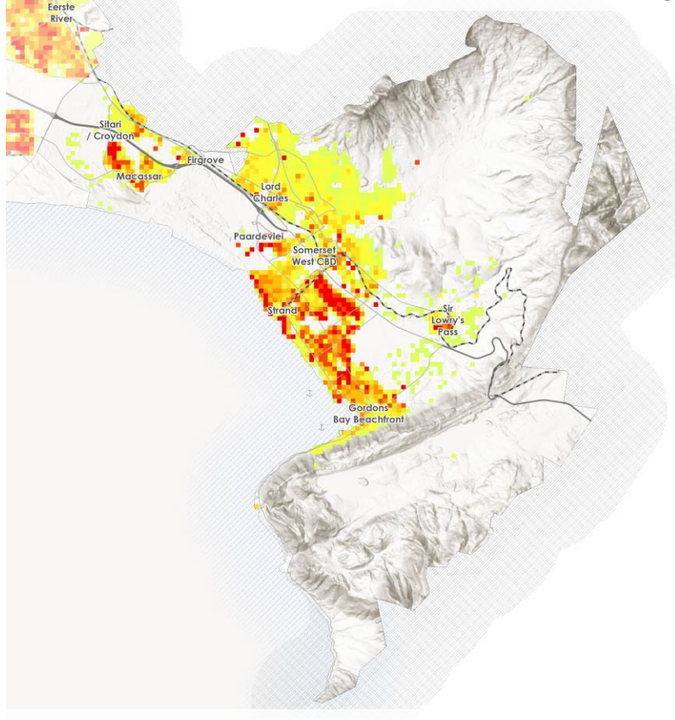
LOCAL LEVEL TRENDS

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 in close proximity to the N2, shows can increase in density from low to high with pockets of high-density residential, especially within the township areas.
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.
9. Macassar has experienced a significant concentration/ increase in density due to approved human settlement housing developments which are medium density in nature and in a construction phase.



Graph C3-b: Helderberg: Formal residential dwellings.



Map C3-b: Helderberg: Gross residential density (2022).

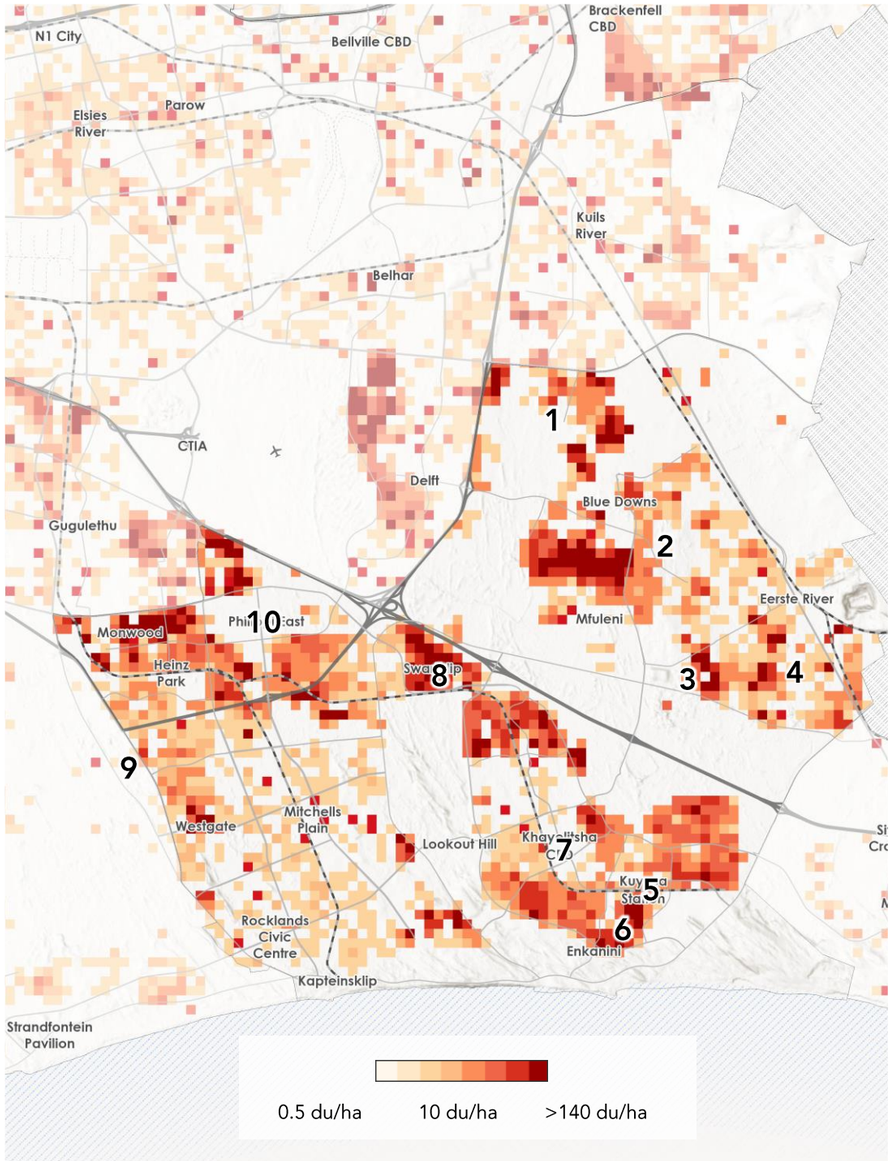
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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.

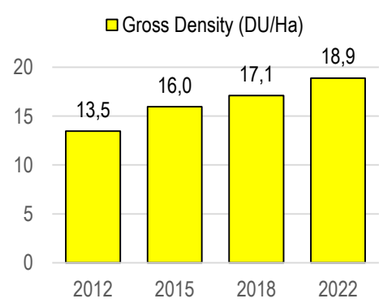
Source: CCT Valuation Rolls 2012, 2015, 2018 and 2022



Map C3-a: KMPGBD: Change in gross residential density (2012 to 2022).

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)

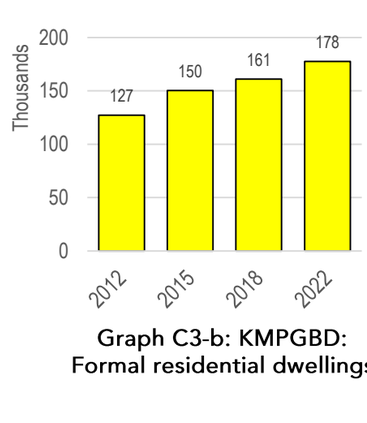
DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)

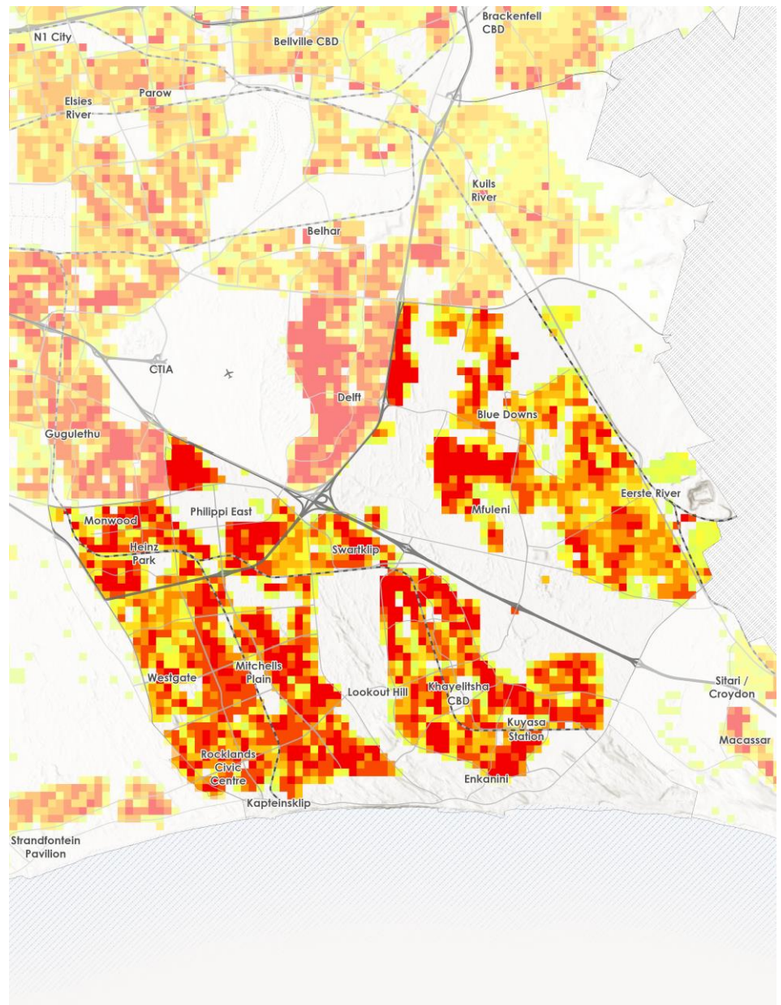
LOCAL LEVEL TRENDS

The following areas in the Khayelitsha/ Mitchell's Plan (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 residential developments, both private and public housing. The form/ typology is mostly single dwelling houses, with a few blocks of flats not exceeding two-storeys. 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 – increase in private residential development in the form of two to three storey flats. Parts of Mfuleni have seen an increase in small-scale rental units.
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 walls. Hillcrest Heights also recently approved with residential opportunities (>3700 units).
4. Greater Eerste River – a number of vacant properties have 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.
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. Notwithstanding, the area has not seen much take-up of formal residential development, but 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. Khayelitsha – Site C, Mxolisi Phetani & Thembokwezi – a plan to upgrade the area was recently approved and will yield over 11 000 housing opportunities.
9. Weltevreden Valley (smallholding area) and parts of Mitchells Plain – a significant number of single dwelling/freestanding houses developed by the private sector approved in recent years. Furthermore, a number of social housing projects let to increased 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, which will further densify this area.
10. 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. One of the large informal settlement known as Kosovo is in the process of being upgraded, which will include different typologies varying from flats, freestanding and semi-detached housing. It will accommodate the over 2300 structures counted in the area.



Graph C3-b: KMPGBD: Formal residential dwellings



Map C3-b: KMPGBD: Gross residential density (2022)

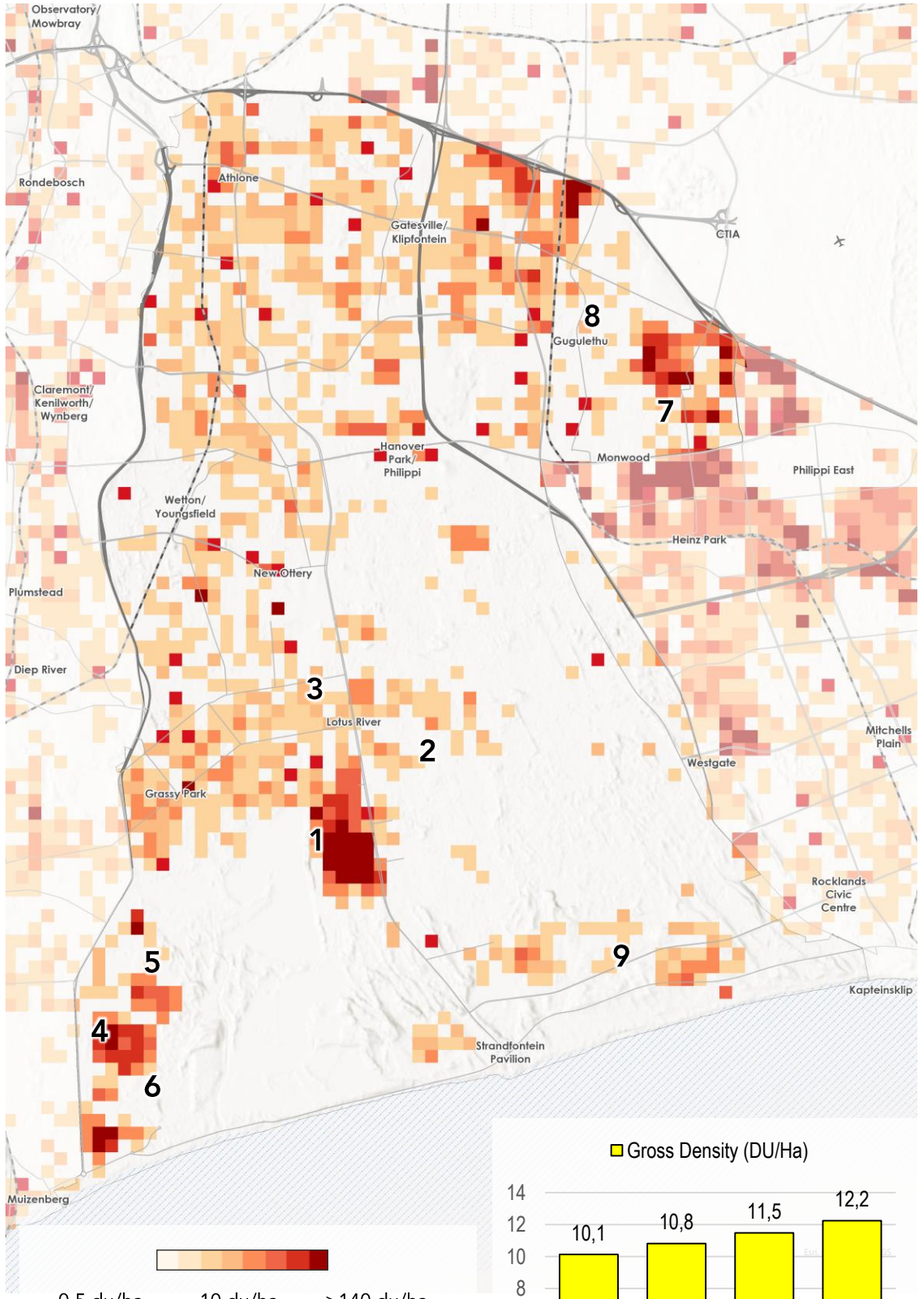
C.3

LAND AND BUILDING DEVELOPMENT

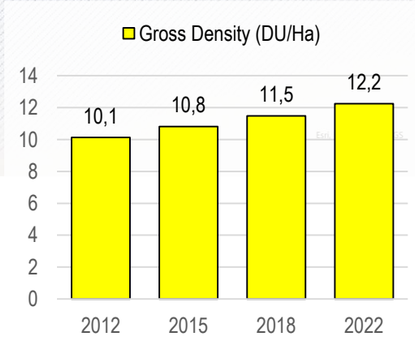
FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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, 2018 and 2022



Map C3-a: Cape Flats: Change in gross residential density (2012 to 2022)



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

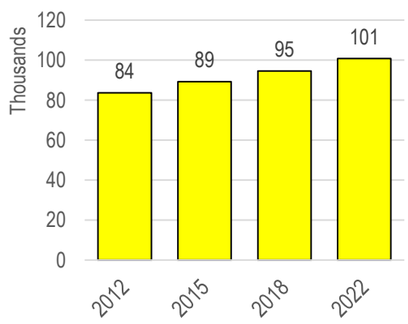
DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)

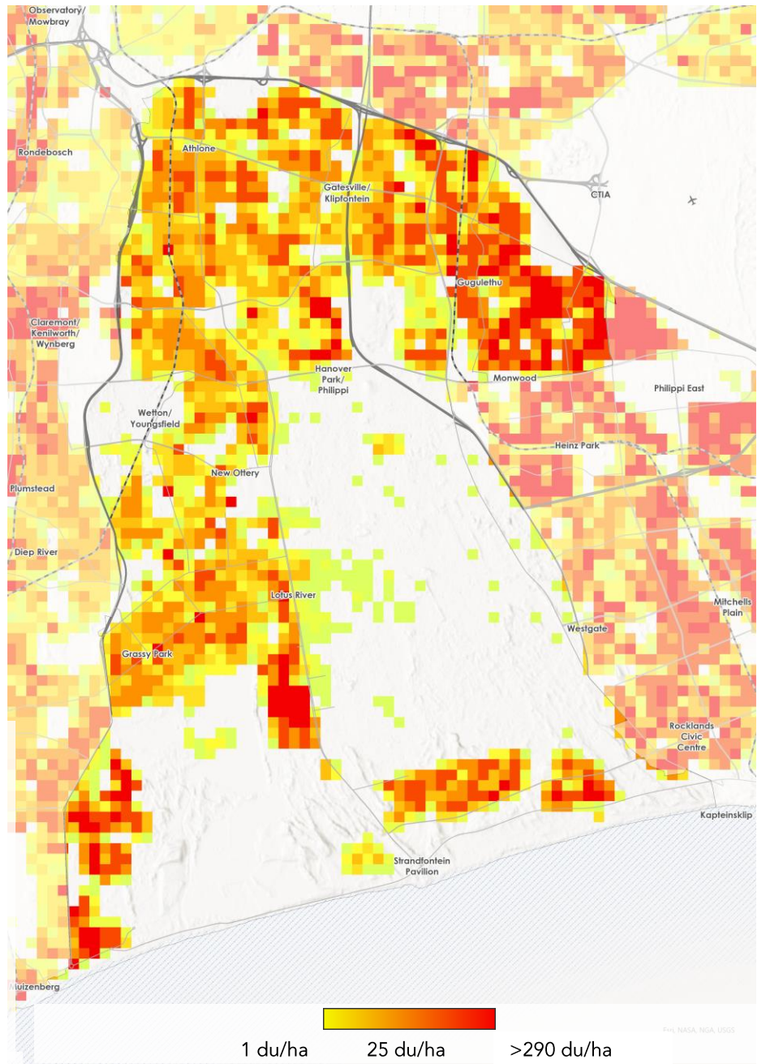
LOCAL LEVEL TRENDS

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.
Strandfontein [9] is generally a low density residential area. However, the trends show that there is an increase in the growth of second and third dwellings both south and north of Spine Road. This could be due to the significant residential NDAs proposed in the area such as the human settlements site and the mixed use coastal node. Additionally, Spine Road is a public transport route (future MyCiti BRT) which improves accessibility in the area.



Graph C3-b: Cape Flats: Formal residential dwellings.



Map C3-b: Cape Flats: Gross residential density (2022)

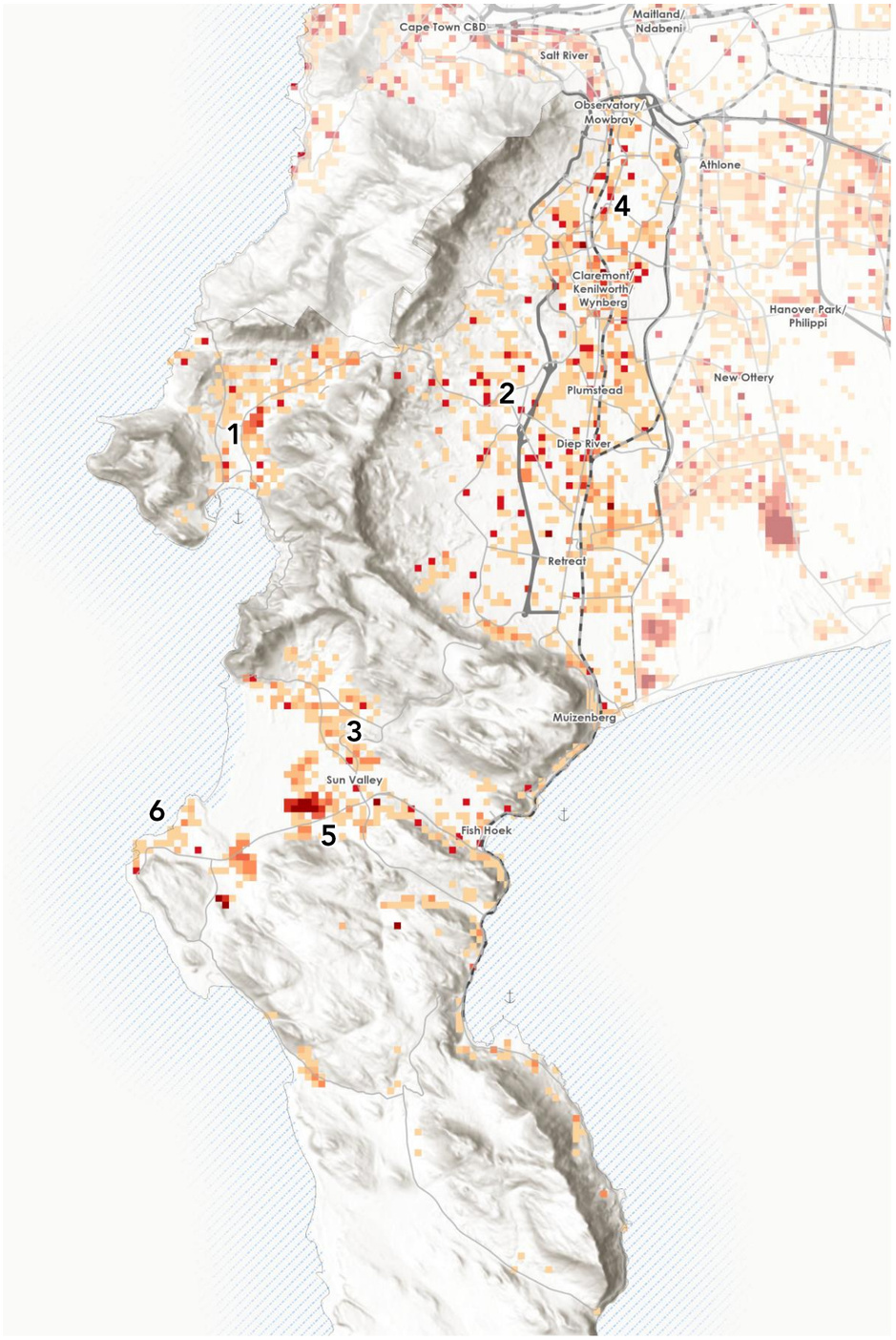
C.3

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2022) 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, 2018 and 2022



Map C3-a: Southern: Change in gross residential density (2012 to 2022).

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

LOCAL LEVEL TRENDS

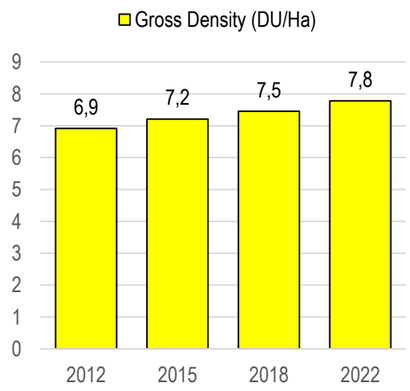
Change in formal residential density in the Southern District has comprised of three distinct types. The most widespread is small-scale incremental subdivisions happening in mainly peripheral low-density residential areas (in [1] Hout Bay, [2] Constantia – Tokai, and to a lesser extent the Far South [3]).

The second is residential infill or densification occurring on smaller undeveloped or underdeveloped pockets (<1ha so not identified as NDAs) throughout the district but mainly close to or within urban nodes and development corridors. Higher density mainly re-development has focussed around the 'UCT sphere of influence' area ([4] Mowbray to Wynberg), comprising small apartments to accommodate one or two person households (students, young workers and single parent families). Generally larger erven (1000-2000m²) comprise 6-10 storey flats built by bigger developers (e.g. Rawson) within or close to urban nodes, and smaller erven (400-1000m²) 3-5 storey flats along the Main Road corridor. Most lower-density developments in more peripheral areas are retirement complexes in response to increasing demand.

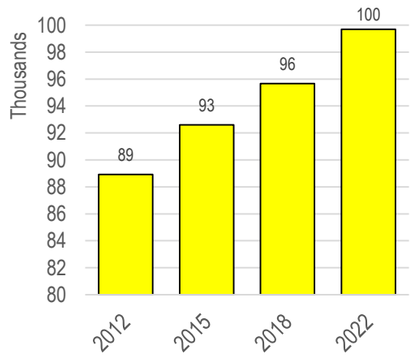
Finally, further densification, mainly of informal structure growth, has occurred in the low-income settlements of Masiphumele [5] and to lesser extent Imizamo Yethu, resulting in extremely high densities (and associated problems).

ALIGNMENT TO SPATIAL POLICY

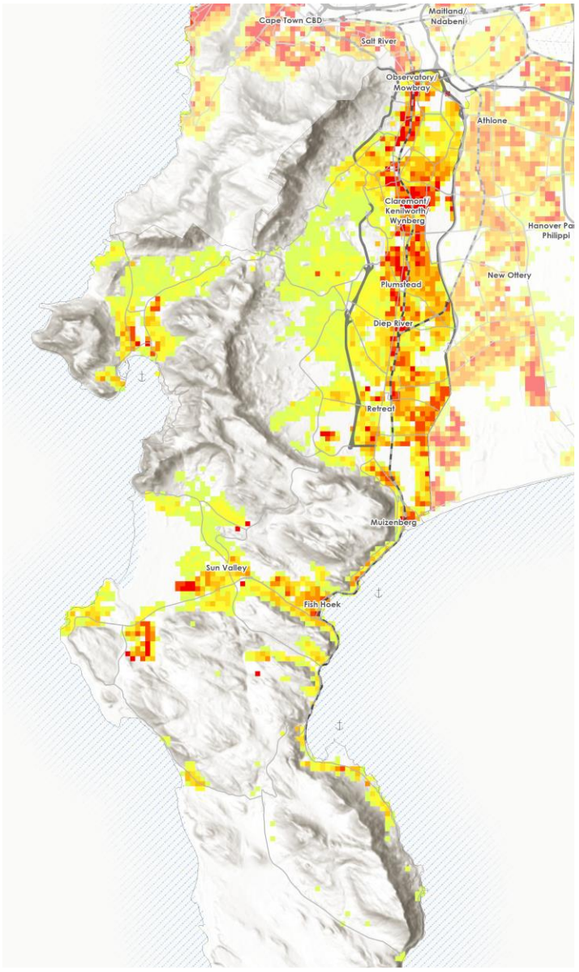
Little to no infill has taken place in identified NDA areas except for residential NDAs in the Kommetjie area [6]. Small-scale densification has however steadily continued in the northern part of Main Road corridor.



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 (2022)

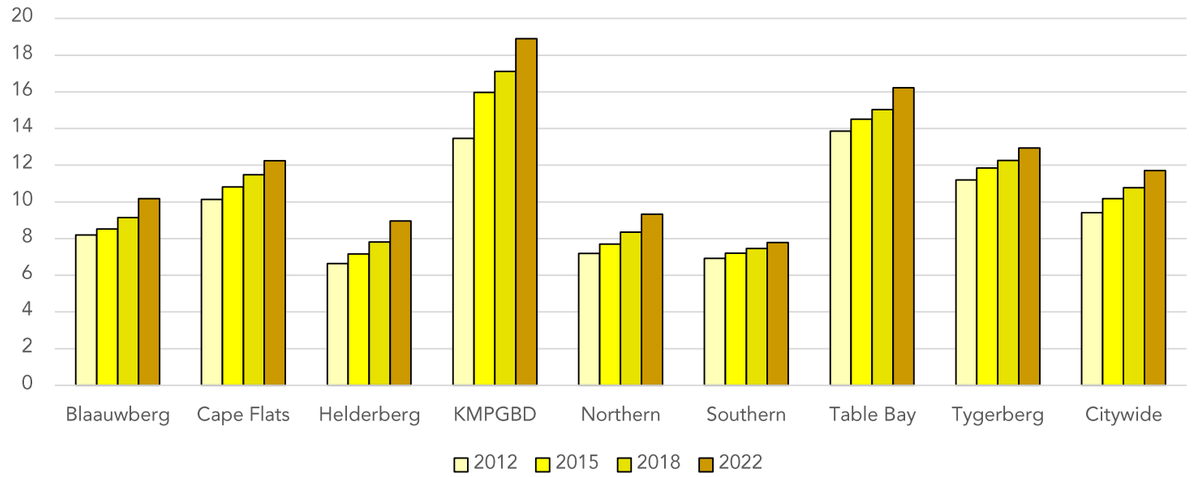
C.3

LAND AND BUILDING DEVELOPMENT

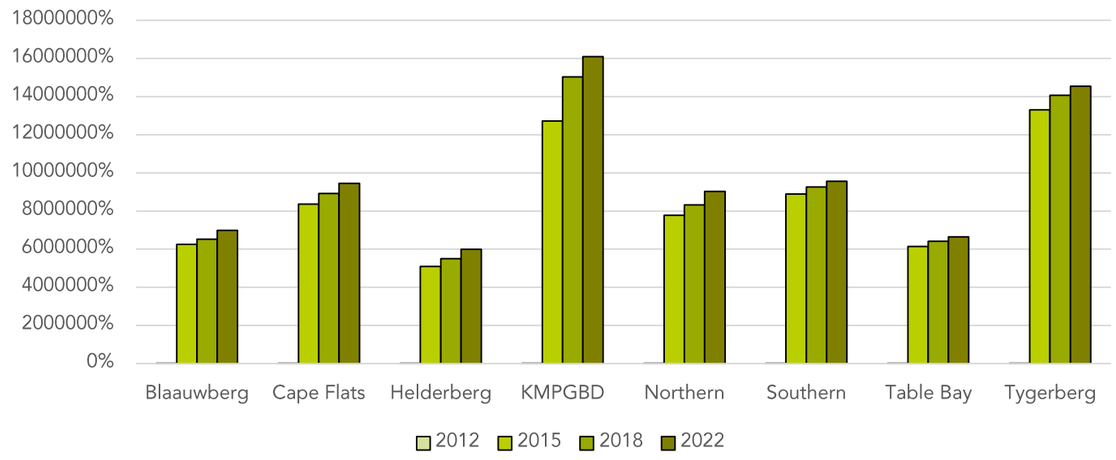
FORMAL RESIDENTIAL DENSITY (DISTRICT ANALYSIS)

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.

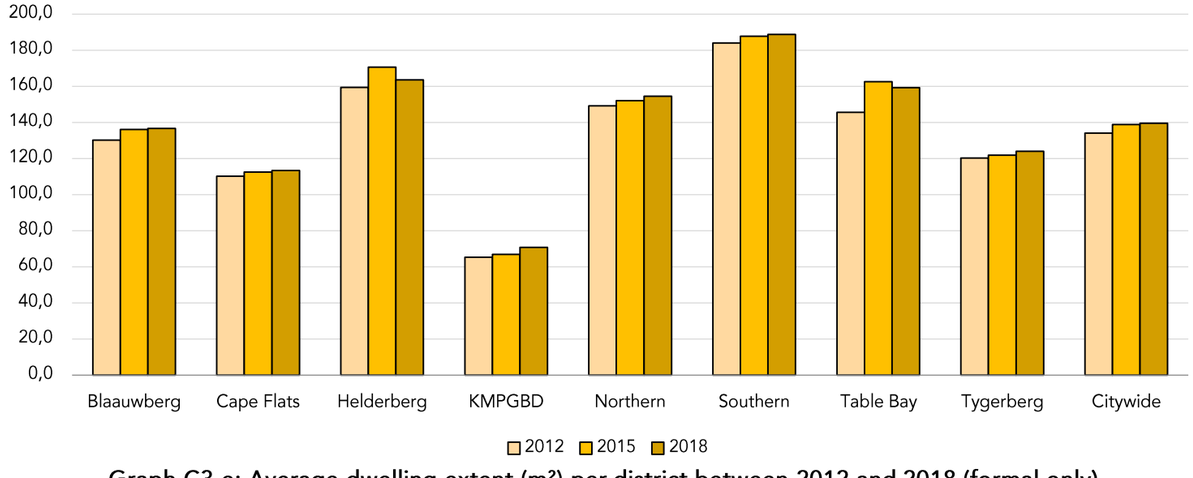
Source: CCT Valuation Rolls 2012, 2015 , 2018 and 2022



Graph C3-c: Average gross density (formal only) per district between 2012 and 2022



Graph C3-d: Number of formal residential dwellings per district between 2012 and 2022



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 2022. Main insights include:

- Citywide, gross density has in general increased over the period. The gross residential density in Cape Town has increased by ± 24% to 11,7 du/ha.
- Gross densities in the KMPGBD, Helderberg and Northern districts have increased by more than 30% and gross densities in the Blaauwberg District have increased by ± 24%. These areas in the city typically have less greenfield land available and intensification is required.
- The gross residential density has increased more slowly in the Southern District (± 12%) , Tygerberg District (± 16%) and Table Bay District (± 17%). These are areas with limited new peripheral development and are often fairly densely developed already.
- Currently, the highest gross densities are in Table Bay and KMPGBD at ± 16 du/ha.

Graph C3-d compares the number of residential units in each of the districts between 2012 and 2022. 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 ±164 000 (24%) between 2012 and 2022.
- Both the Helderberg and KMPGBD districts saw an increase of ± 30% over the six-year period.
- The Cape Flats, Northern and Blaauwberg districts all saw increases of over 20%.

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

FORMAL RESIDENTIAL DENSITY

KEY TAKE-AWAY TRENDS

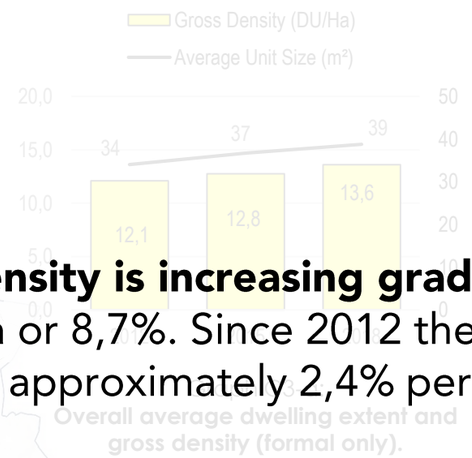
- **Gross density is increasing gradually.** From 2018 - 2022, formal gross density by 0.9 du/ha or 8,7%. Since 2012 the average annual increase in formal gross density has been approximately 2,4% per annum.

- **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.**





Overall average dwelling extent and gross 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, 2022).
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, 2018, 2022

OVERALL TREND

Non-residential land use include agricultural, educational, entertainment, arts, recreation, sport, health, hospitality, utility, mining, manufacturing, office, public service, retail/wholesale, services, transport, and warehousing/ storage activities. As expected, non-residential land use increased over the period 2012-2022 at different levels for the various property sectors, as influenced by factors relevant to each.

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 available floor space.

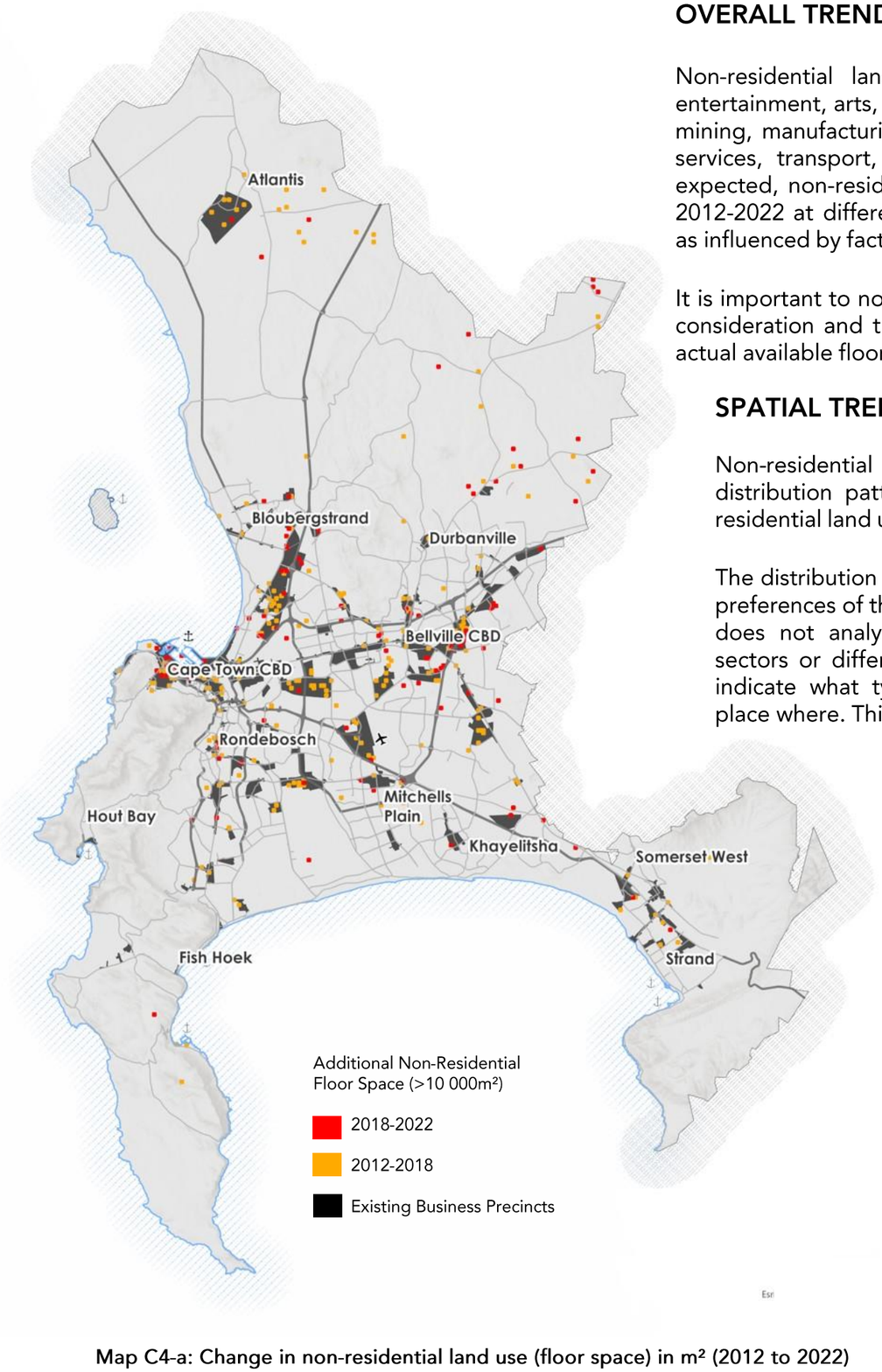
SPATIAL TREND (DISTRIBUTION/ PATTERN)

Non-residential development reinforces existing spatial distribution 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 or different economic sectors, e.g. this does not indicate what type of non-residential development took place where. This is done in other indicators.

The following spatial trends can be observed from the maps depicted:

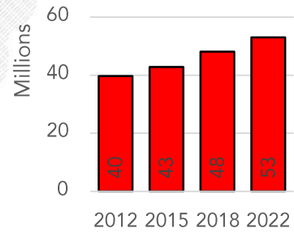
- The most notable increases in non-residential development occurred within established business precincts pointing to a tendency to agglomerate.
- The CBD, Foreshore, V&A Waterfront, Century City, Killarney Gardens, Montague Gardens, as well as Bellville South, and specifically Brackengate and Blackheath have experienced significant increase in non-residential development between 2012 and 2022.



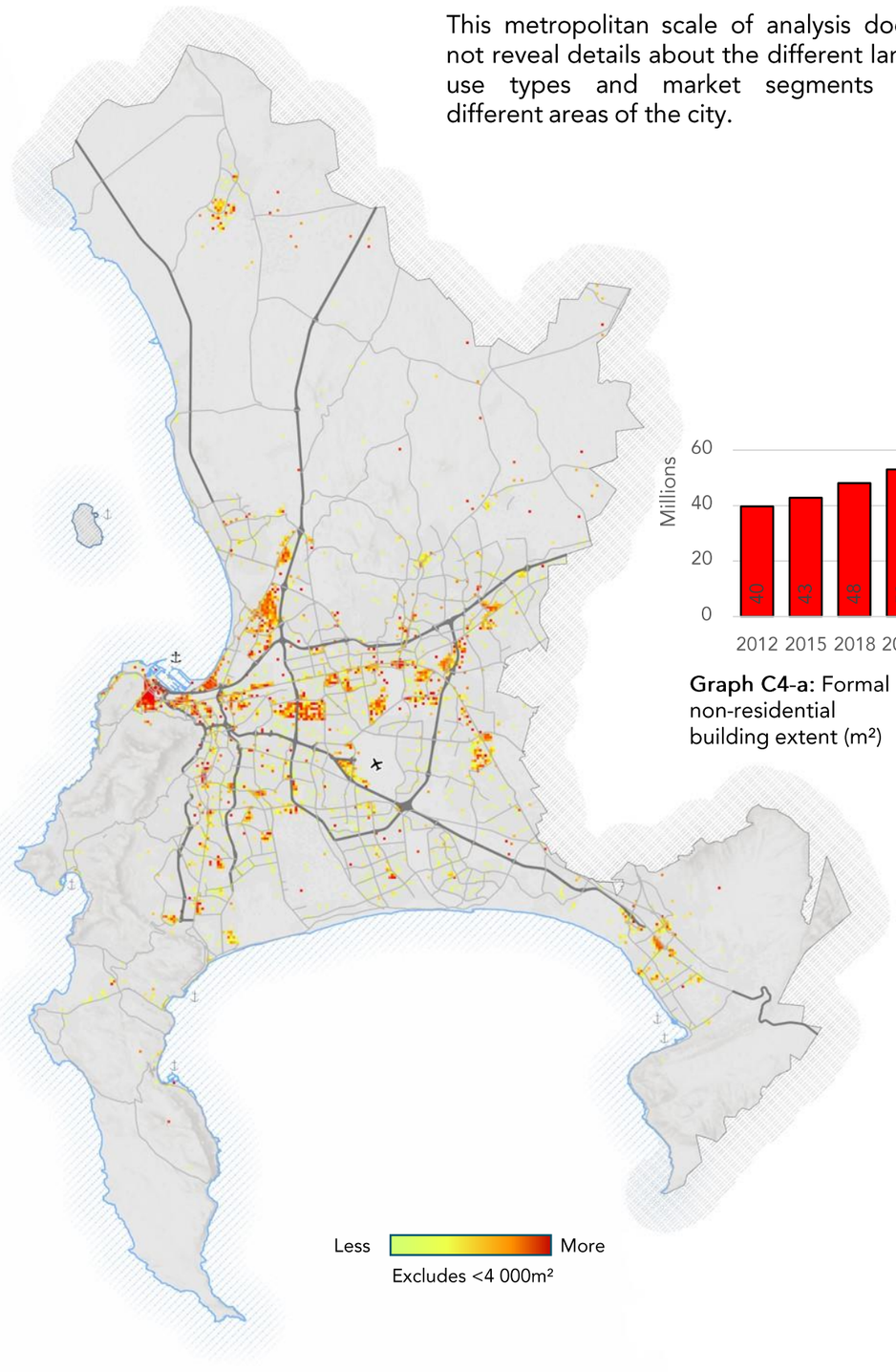
Map C4-a: Change in non-residential land use (floor space) in m² (2012 to 2022)

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.



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



Map C4-b: Non-residential land use (floor space) in m² (2022)

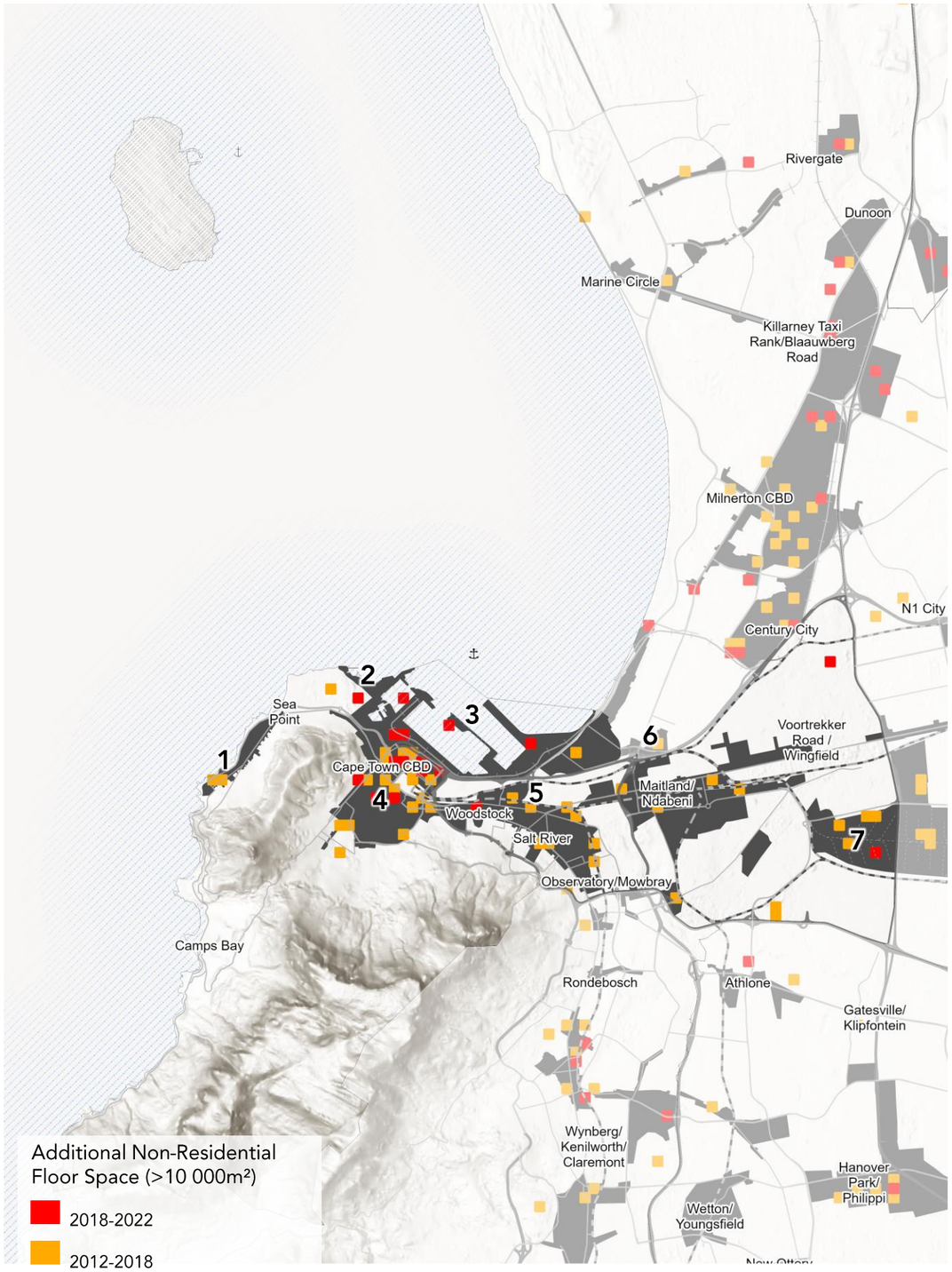
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



Map C4-a: Table Bay: Change in non-residential land use (floor space) in m² (2012 to 2022)

DISTRICT LEVEL ANALYSIS

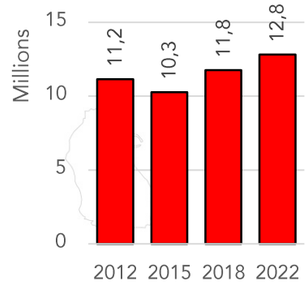
TABLE BAY DISTRICT (A)

ALIGNMENT TO SPATIAL POLICY

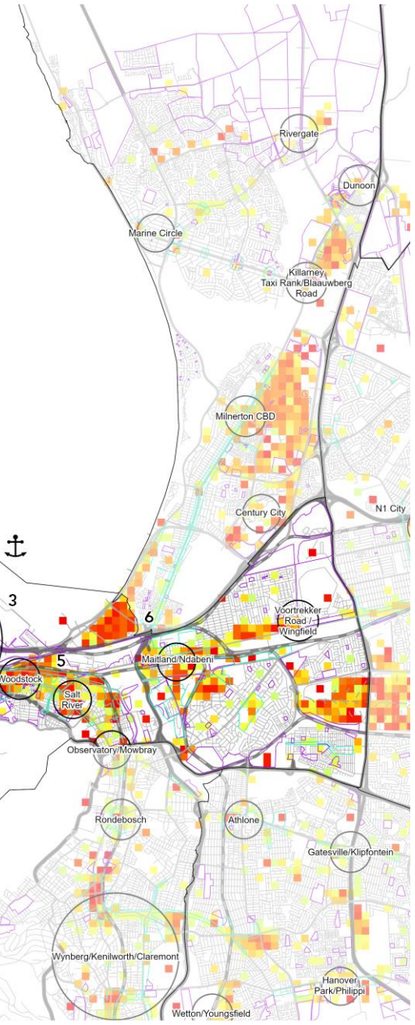
All of these non-residential (new of re-developments) are in-transit and employment-accessible, mixed-use areas, either within or in proximity to nodes and corridors and aligned to spatial planning policy (located in identified business precincts).

LOCAL LEVEL TRENDS

1. Sea Point and Green Point: are retaining and expanding street retail, with new developments maintaining a ground floor retail component.
2. The V&A waterfront continues to diversify and expand its destination offerings, and lead innovation in green building. Examples include the development of larger public space and the moving of the Big Wheel to Granger Bay, the opening of the Time Out market and the opening of a Café building made with fully repurposed materials.
3. The port remains an economic fulcrum of the City, including accessible areas such as the Cruise terminal and Makers Landing, there are plans to improve Port efficiency through plans to expand container handling capacity.
4. CBD has shown remarkable resilience and recovery, while new developments have been largely residential led, office vacancy rates are now below pre pandemic levels.
5. Salt River and Woodstock developments, such as 1 on Albert and Woodstock Quarter have maintained retail at Ground Level, revitalising street retail on the historic streets.
6. Paarden Eiland, Maitland, Ndabeni, Epping continue to perform strongly as economic nodes, but have in many cases introduced consents for alternative uses, included retail and recreation.
7. Epping Industrial shows growth in non-residential land uses.



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



Map C4-b: Table Bay: Non-residential land use (floor space) in m² (2022)

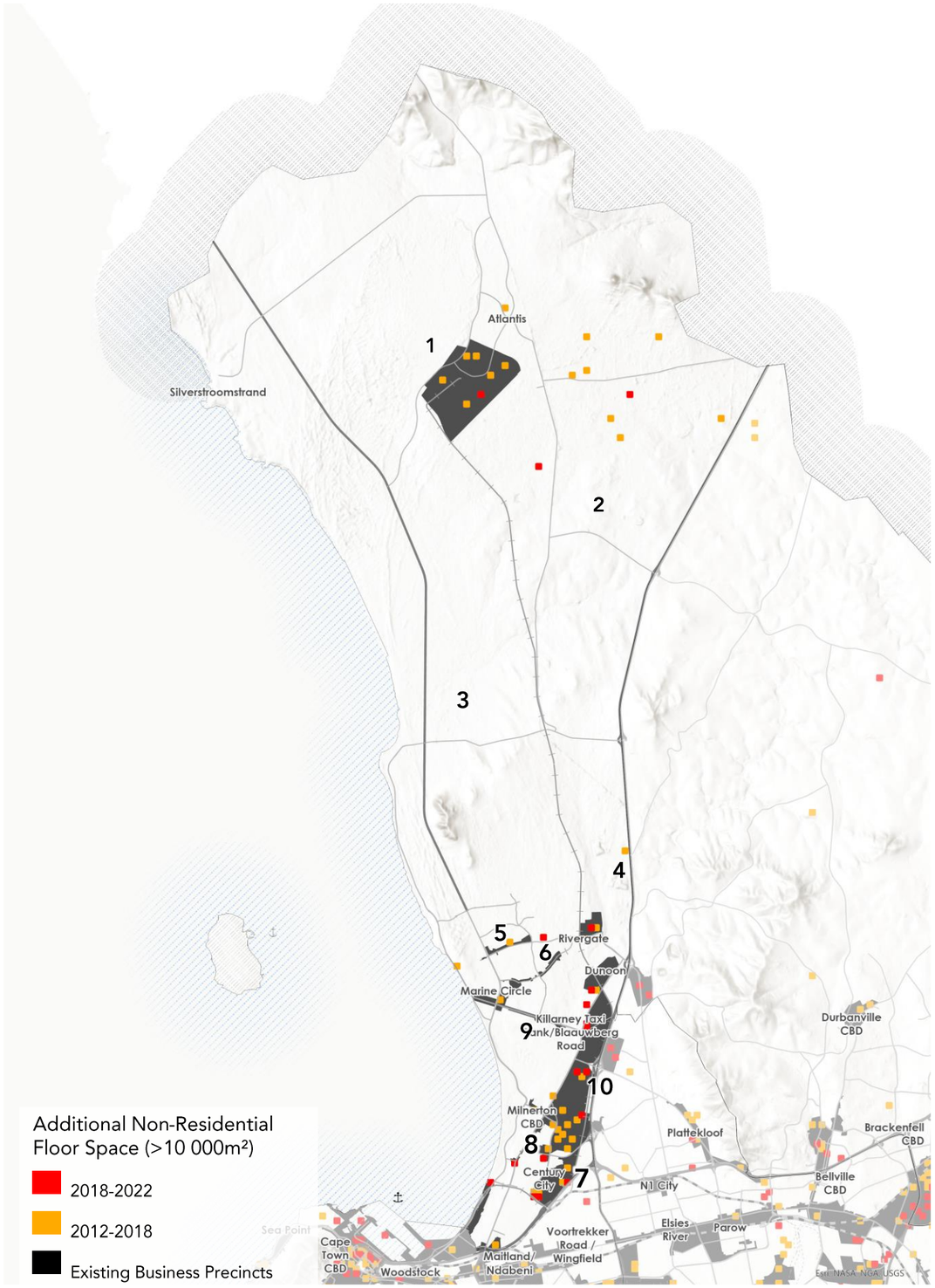
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



Map C4-a: Blaauwberg: Change in non-residential land use (floor space) in m² (2012 to 2022)

DISTRICT LEVEL ANALYSIS

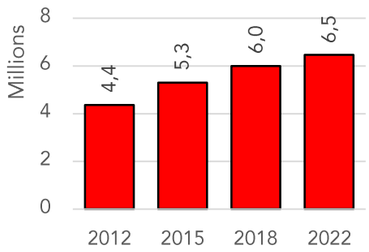
BLAAUWBERG DISTRICT (B)

ALIGNMENT TO SPATIAL POLICY

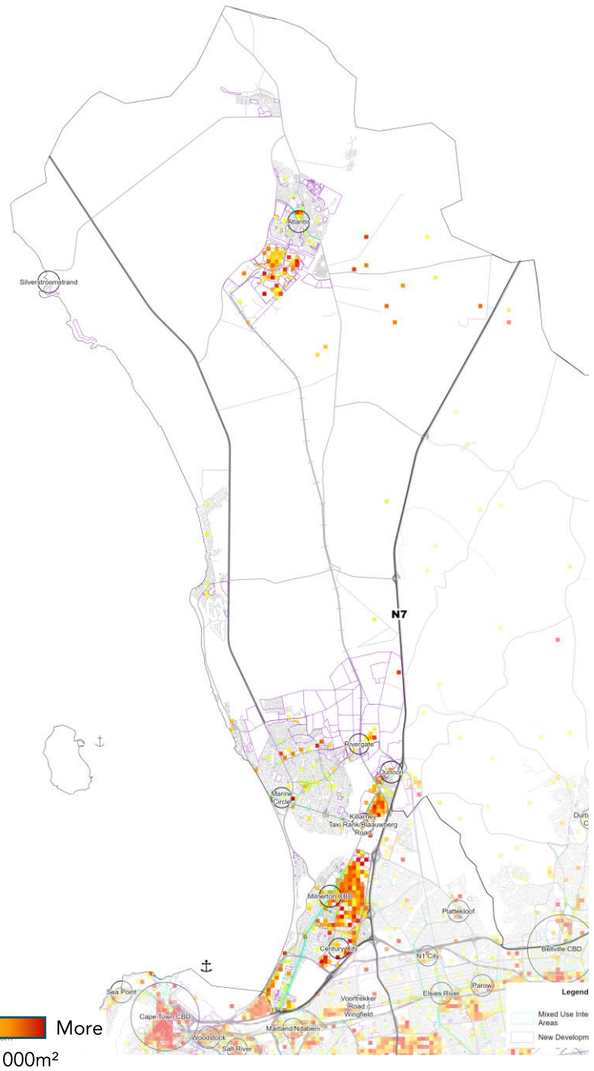
Growth in economic floor space continued in existing economic areas, and along the N7. Precinct management and active City Improvement Districts played a role in location choices of firms, driving the attractiveness of Montague Gardens and Century City.
A revitalised and people centred urban form, aligning more closely to urban design policy has only been achieved in parts of Century City, with most of the District still dominated by vehicle infrastructure.

LOCAL LEVEL TRENDS

1. The Atlantis industrial incentives and Special Economic Zone drove the take up of industrial rights in this area. The town centre of Atlantis has attracted new investment.
2. The agricultural areas in the District, especially the smaller farms east of Atlantis, continues to attract investment in agricultural enterprise, tourist destination offerings, and land uses optimizing the N7 (truck stops and farm stalls).
3. Visserhoek landfill site and waste beneficiation has driven some facility growth in association with the landfill site.
4. The Rivergate industrial site continues to develop in this area, with more contemporary and flexible industrial and commercial development.
5. Retail development in the District has been driven primarily by redevelopment at shopping Centres and development of the Table Bay Mall.
6. Parklands Main Road and Sandown Road have added non-residential floor space, typically in a car dominated strip mall form.
7. Century City continues to take up their basket of rights, adding more hospitality and recreation components.
8. Paarden Eiland North and Killarney Gardens continue to perform well as industrial areas.
9. Residential to business conversion along key routes, including Koeberg Road and Blaauwberg Road.
10. Warehousing and digital economy are drivers of development growth in Montague Gardens.



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



Map C4-b: Blaauwberg: Non-residential land use (floor space) in m² (2022)

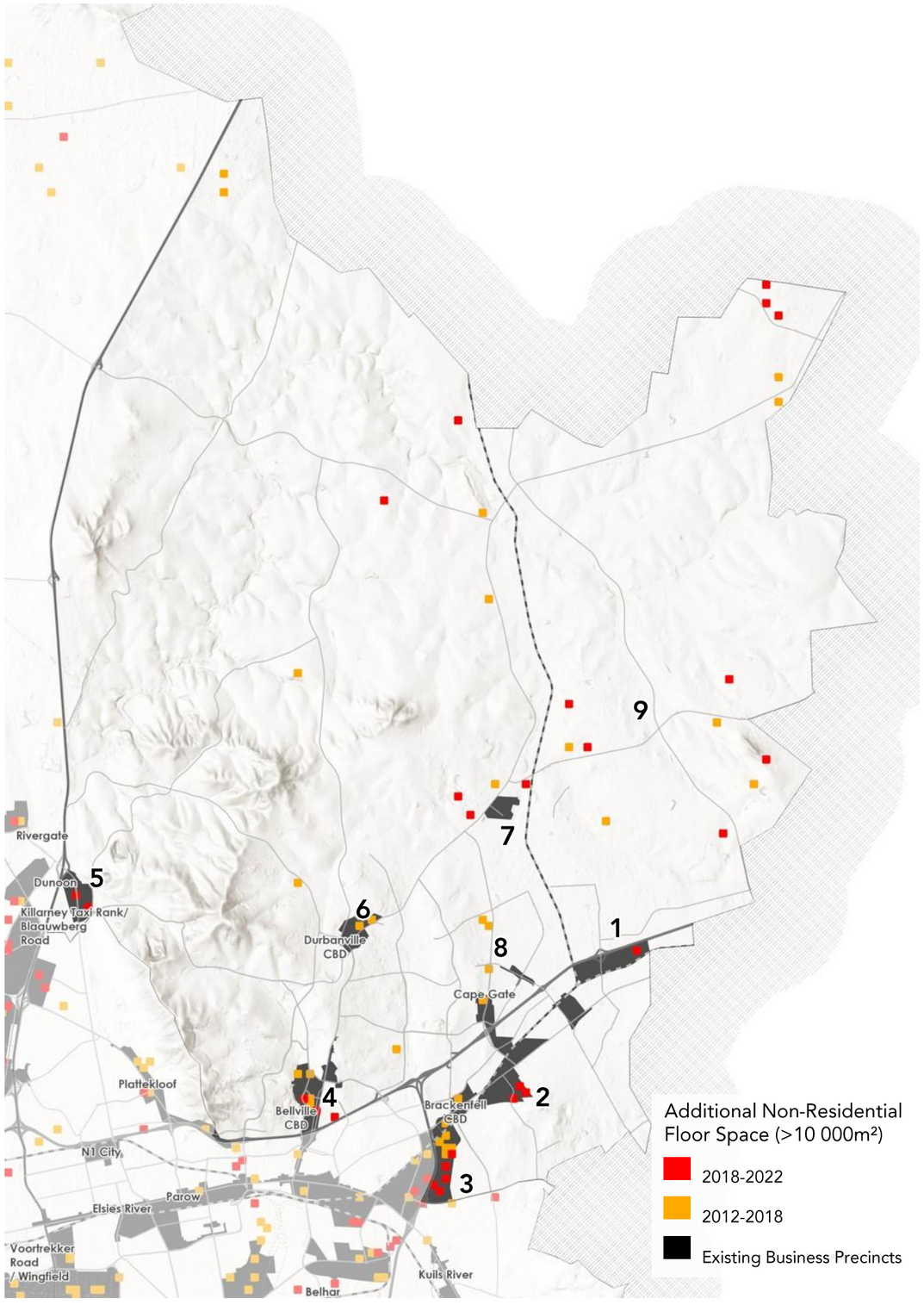
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



Map C4-a: Northern: Change in non-residential land use (floor space) in m² (2012 to 2022)

DISTRICT LEVEL ANALYSIS

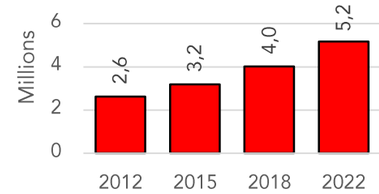
NORTHERN DISTRICT (C)

ALIGNMENT TO SPATIAL POLICY

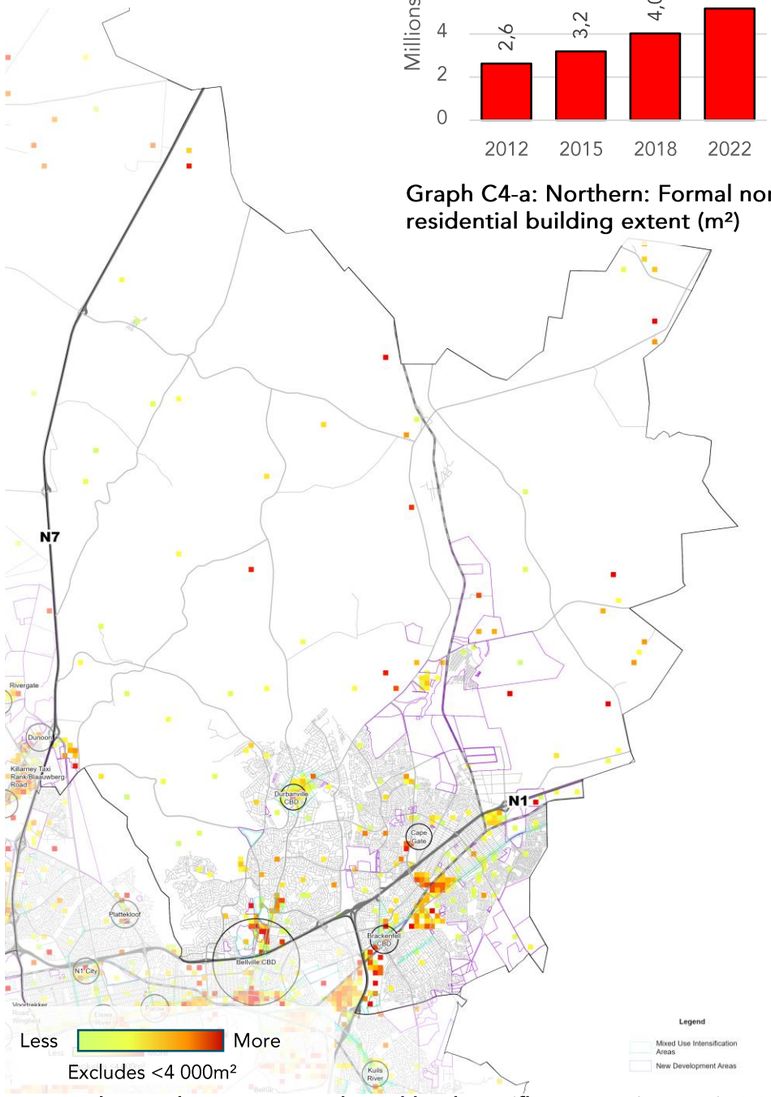
In the majority of instances, the changes in non-residential development between 2012 and 2022 has been noted in nodal areas, along development corridors and in industrial areas. This trend is aligned to targeted areas for mixed use development as per the approved spatial policy.

LOCAL LEVEL TRENDS

1. Kraaifontein Industrial Area: Infill industrial and related development.
2. Everite Industrial Area: Redevelopment and intensification of use. The 2023 District Plan designates the site as an industrial NDA.
3. Bracken Gate 2: Implementation of industrial and related development in the form of warehousing and commercial uses as proposed in the 2012 & 2023 Northern District Plans.
4. Tyger Valley nodal area: Developments in the wider Tyger Valley Area are attributed primarily to redevelopments and upgrades, such as the partial roofing of the Willowbridge Centre, as well as redevelopment of buildings along Edward Street.
5. Atlantic Hills: Industrial and related development.
6. Durbanville Secondary CBD: Developments of either commercial, or a mix of commercial and residential (higher density)(commercial at ground level, with residential at upper floors) uses as is provided for in the 2023 Northern District Plans.
7. Fisantekraal Industrial Area: Development of industrial and related uses in the area earmarked for such use in the 2023 Northern District Plans.
8. Okavango Road (wider Cape Gate Node): Commercial development in the Cape Gate Node and further to the north, along Okavango Road, of which the majority are car-sales related.
9. Agricultural hinterland: Development in the hinterland is very much related to either agricultural uses, or sand-mining and renewable energy developments on portions of agriculturally zoned land.



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



Map C4-b: Northern: Non-residential land use (floor space) in m² (2022)

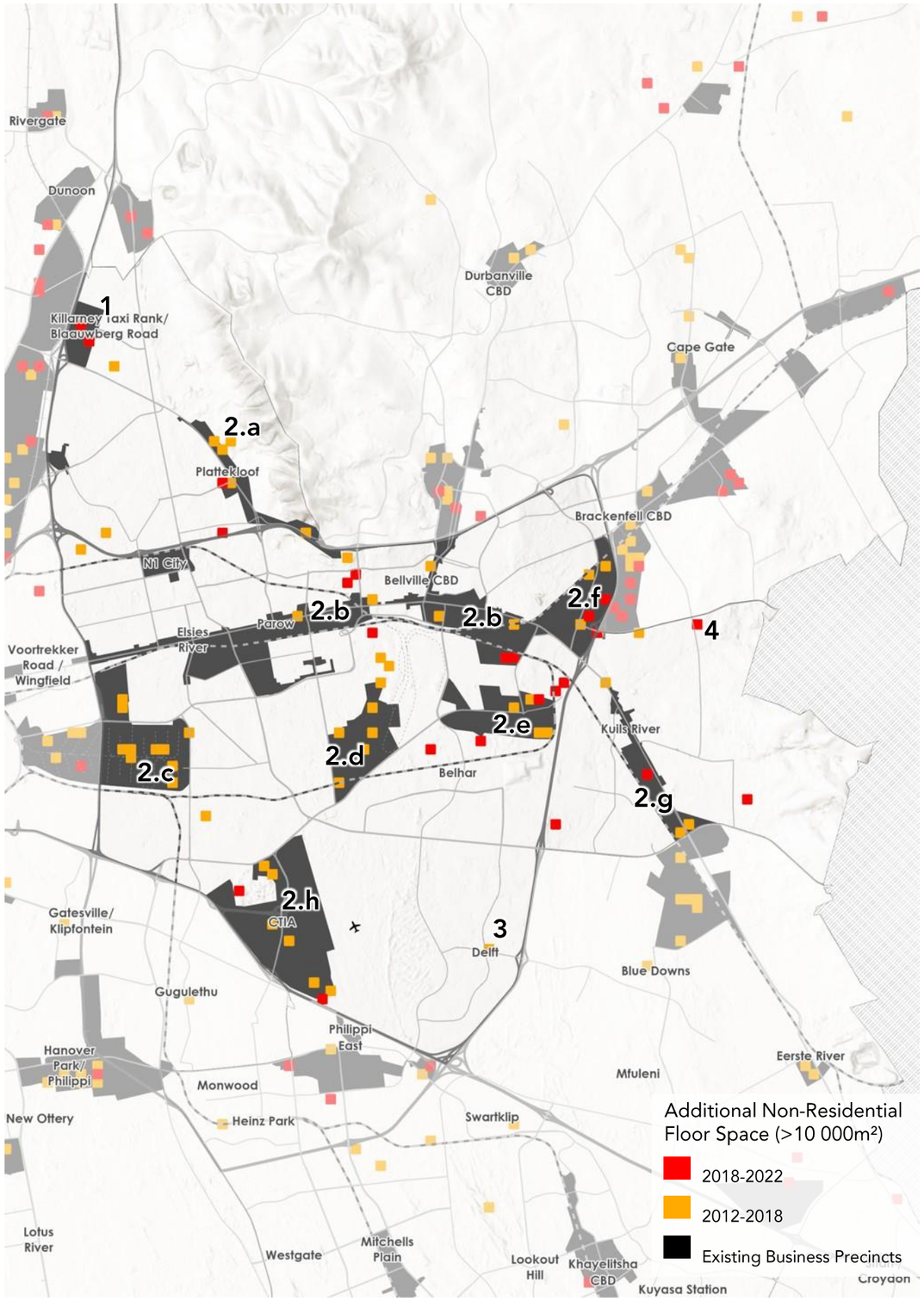
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



Map C4-a: Tygergberg: Change in non-residential land use (floor space) in m² (2012 to 2022)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)

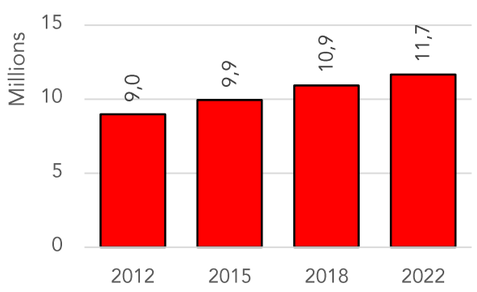
ALIGNMENT TO SPATIAL POLICY

Significant increases in non-residential development between 2012 and 2022 were noted in mostly nodal areas, along development corridors and in industrial areas. This trend is aligned to targeted areas for mixed use development as per the spatial policy.

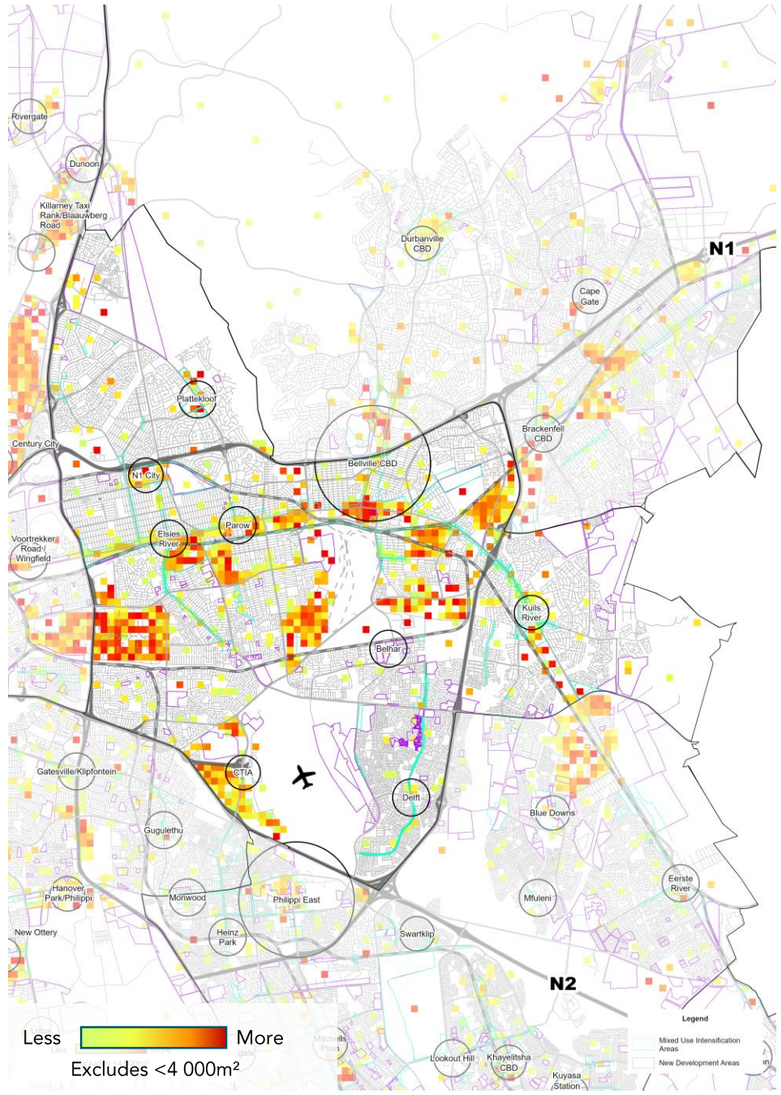
LOCAL LEVEL TRENDS

The section below highlights the areas where a substantial change in non-residential develop-ment has been noted between 2012 and 2022.

1. Richmond Park – mixed use area consisting of warehousing and retail land uses.
2. Substantial increase in non residential development is concentrated in the industrial and commercial nodal areas including:
    a. Plattekloof local node
    b. Voortrekker Road Corridor
    c. Epping Industria
    d. Parow Industria
    e. Sacks Circle Industrial area
    f. Stikland Industrial area
    g. Kuilsriver Industrial area
    h. Airport Industria
3. Increase in non-residential development in Delft – corner Hindle & Delft Main Roads (Shopping Centre).
4. Kuilsrivier/ Brakcenfell: Hazendal Gables Shopping Centre.



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



Map C4-b: Tygerberg: Non-residential land use (floor space) in m² (2022)

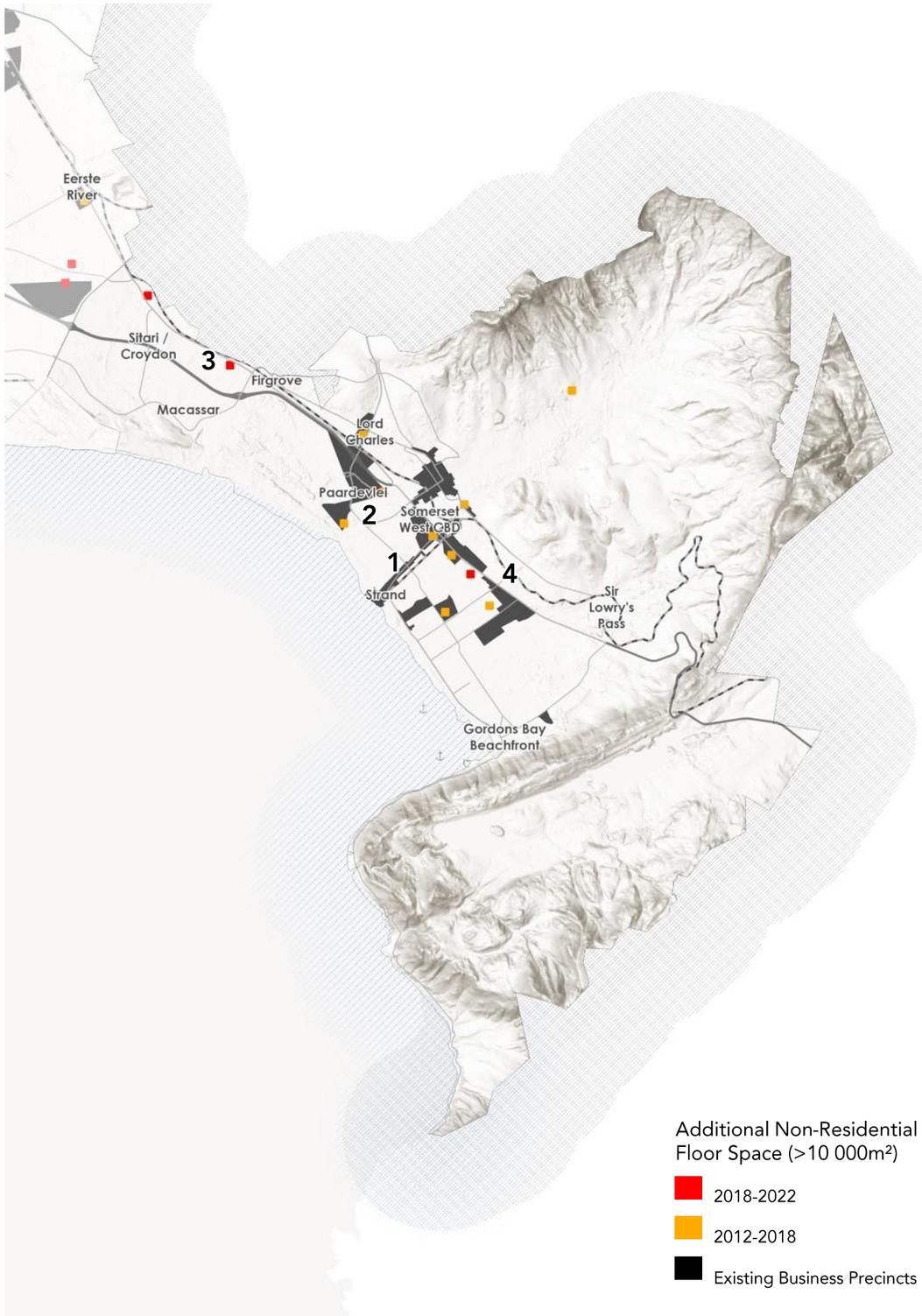
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



Map C4-a: Helderberg: Change in non-residential land use (floor space) in m² (2012 to 2022)

DISTRICT LEVEL ANALYSIS

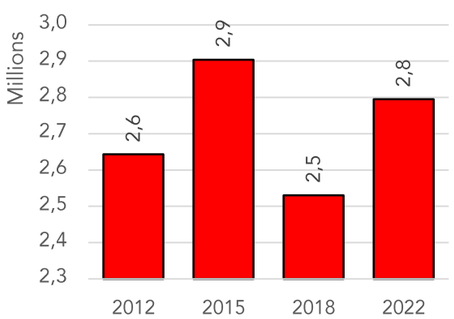
HELDERBERG DISTRICT (E)

ALIGNMENT TO SPATIAL POLICY

Significant increases in non-residential development between 2012 and 2022 occurred in various regions within the district in line with spatial policy.

LOCAL LEVEL TRENDS

1. Strand Main Road shows an increase in non-residential development along the Main Road and Beach Road and around the Strand Pavilion area. There has also been an increase in coffee shops and restaurants along Beach Road itself utilising existing building space. Furthermore, in Strand, along Main Road, there is an increase in non- residential development in the form of business expansion in relation to car dealerships, etc.
2. Paardevlei has seen an increase in non-residential gross leasable areas to accommodate an increase in offices, coffee shops and art galleries, etc.
3. Increases in non-residential gross leasable areas were also experienced in Firgrove with the development of the Huntsman development which include a school and the adjacent shopping complex. The same can be seen in Sitari Lifestyle Estate which included a mix of residential and non-residential land uses which includes office and retail uses.
4. Due to the possible N2 realignment, there has been an increase in non-residential land uses in the form of offices, businesses and schools that were developed along the existing N2 which will become the T2 in future.



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



Map C4-b: Helderberg: Non-residential land use (floor space) in m² (2022)

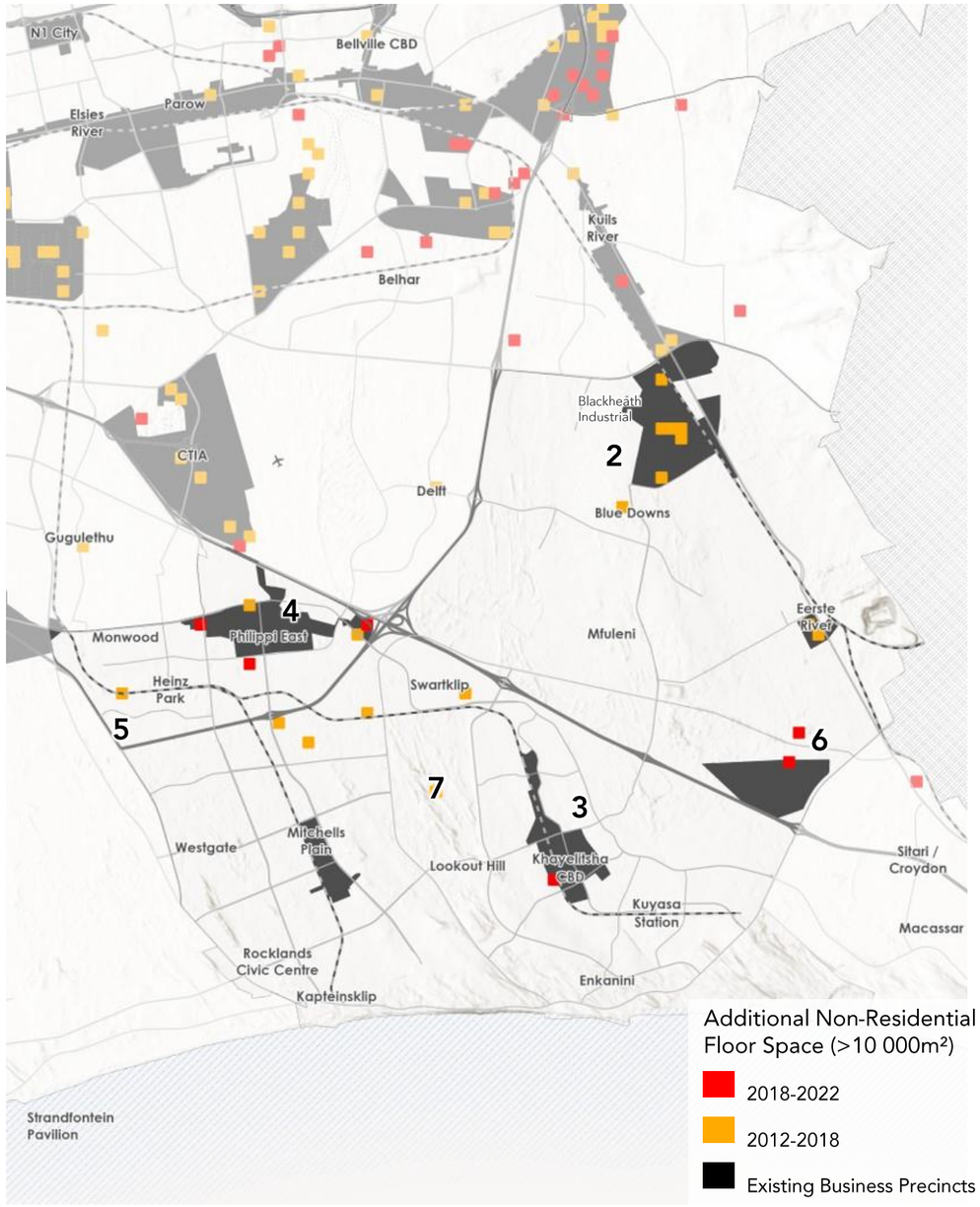
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



Map C4-a: KMPGBD: Change in non-residential land use (floor space) in m² (2012 to 2022)

7. Generally the district has not seen significant increases in non-residential uses. The area is dominated by residential development, that may have some small scale imbedded non-residential uses. What is notable is that the increase in the conversion from residential to non-residential is insignificant at this stage (not visible on the maps above and hence not picked up in the Valuation Rolls). However, it is setting up a precedence that is heading in the right direction, hopefully over time there will be higher concentrations of employment opportunities generally related to non-residential land uses. The other challenge is limited vacant land which could be developed for non-residential land uses and a history of low market interest. Swartklip is the only area that has potential for fairly large increase in non-residential land uses.

DISTRICT LEVEL ANALYSIS

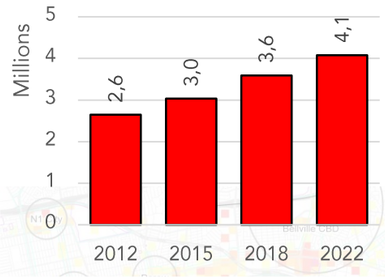
KMPGBD DISTRICT (F)

ALIGNMENT TO SPATIAL POLICY

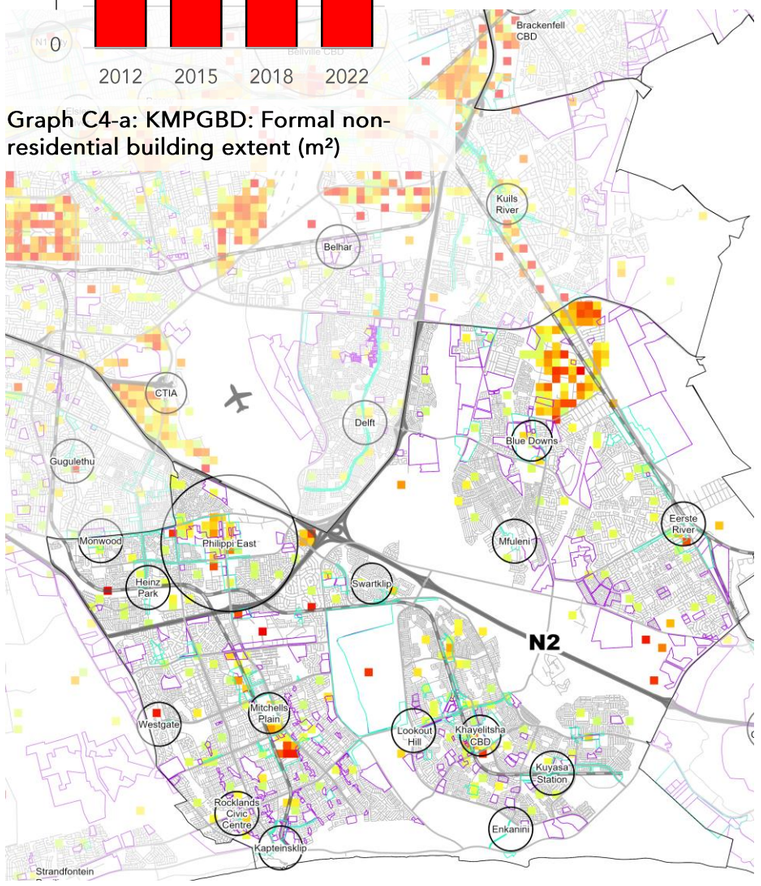
Most of the spatially targeted areas in the KMPGBD District plan have not seen much take up or appetite. However, a number of mixed-use intensification areas, have seen application submissions to take up the opportunities. While not significant development, it shows a promising trend that will hopefully continue over the next few years, subject to infrastructure investment.

LOCAL LEVEL TRENDS

1. Compared to other districts, the KMPGBD area has continued to experience a low presence of non-residential land uses with only minimal increases of the past decade.
2. Blackheath & Greater Blue Downs – has recently seen a number of non-residential approval, in the form of small scale business and within the industrial area, extension of some but also new warehouse been approved. Limited activity regarding manufacturing land uses. However, the above are small scale developments and don't yield a noticeable change in the non-residential land uses, as they are scattered across the aforementioned areas.
3. Greater Khayelitsha - a number of applications were recently approved, related to the improvement of the CBD area, increasing the gross leasable area and included approval of entertainment areas such the Milk Restaurants and Kwa Ace. The area has also seen a number of small-scale business converting from residential to commercial, such as salons, barber shops, office spaces (lawyers, real estate etc.) and some light industrial uses, such as mechanical, panel beating, spray painting etc.
4. Philippi east – included approval of shopping centres and storage facilities, and although the area is earmarked for mixed use activities, it is still experiencing a number of challenges, which affect the confidence of the investors coming into the space, such as infrastructure capacity limitations and urban management challenges. The recently approval of the Philippi Opportunity Area LSDF (POA) will probably play a role in attracting investors in the area. Also the improvement of the infrastructure, will likely lead some changes and more take up of non-residential land uses given the strategic location of the area. Improved access points to the N2 will be important to increase accessibility of the area to the higher order routes.
5. Weltevreden Valley – minimal, but growing interest in development of non-residential land uses, attributed to the increase in residential development, to support the growing population (convenient centres and other commercial activities). Lack of community facilities continue to exist.
6. Eersteriver South (Cape Town Film Precinct) – significant and recent non-residential land uses increases visible inclusive of a few warehouses. Supporting the vision for the area to accommodation more job opportunities and non-residential land uses.



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



Map C4-c: KMPGBD: Non-residential land use (floor space) in m² (2022)

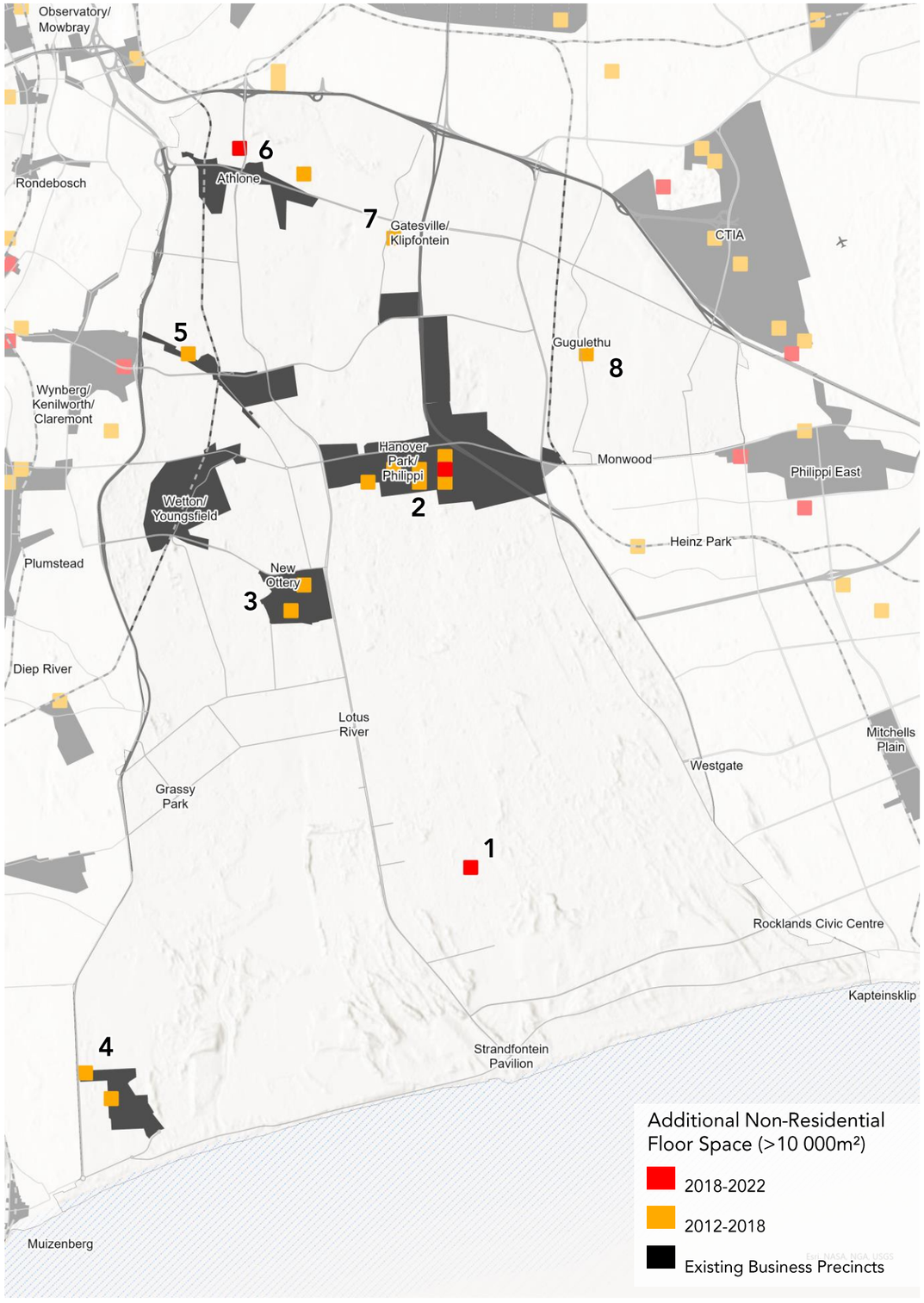
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



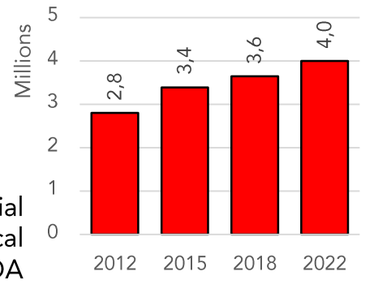
Map C4-a: Change in non-residential land use (floor space) in m² (2012 to 2022)

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)

ALIGNMENT TO SPATIAL POLICY

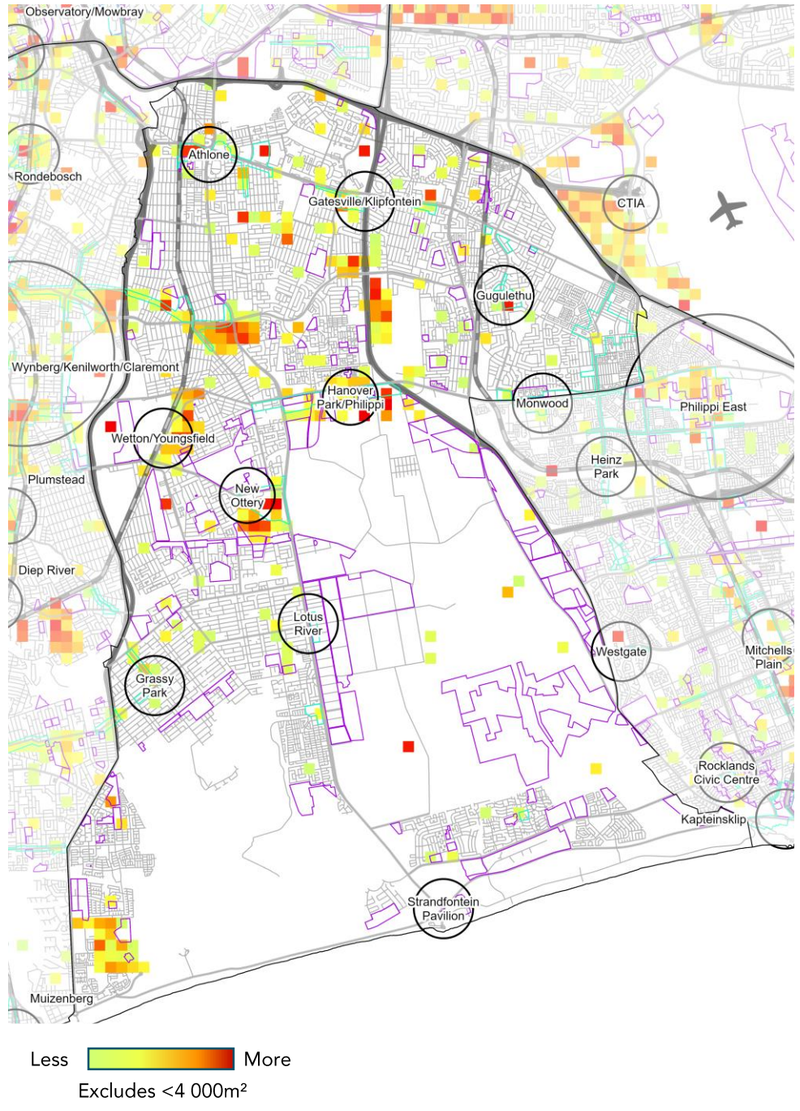
All the non-residential land use changes are in line with the spatial policy context. The changes have occurred in district or local nodes, development corridors, mixed use/residential NDA existing business precincts.



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

LOCAL LEVEL TRENDS

1. The Philippi Horticultural Area (PHA) has seen an increase in non residential uses in the form of new utilities (electricity substations in this case) being provided in the area.
2. Landsdowne Industria (Philippi North) is predominantly an industrial area so it is expected that there has been an increase in non-residential land uses over the years. This is a positive sign as it indicates economic growth.
3. The Ottery District Node has experienced an increase in non-residential uses. This is in line with the character of the area as an existing business precinct.
4. Capricorn Park has received a new school which is in line with the area being identified as an mixed use and residential NDA. There are also plan to develop housing on the site. The local shopping centre has also been extended. Both developments occur adjacent to Prince George Drive. Capricorn Business and Technology Park to the east of the aforementioned shopping centre has also received many new light industrial developments in relation the area being a well established business and industrial precinct.
5. Lansdowne is an area which includes a mix of uses, particularly along Imam Haron Road (where the orange marker occurs on the map) which is designated as a mixed use area in the Cape Flats District Plan. Therefore, non-residential uses are expected and desired.
6. Non-residential growth occurs in and around the Athlone district node. This is aligned to the Klipfontein development corridor which enables ease of access to this area.
7. The non-residential development in Gatesville coincides with the mixed use precinct which already includes many non-residential uses such as a hospital, place of worship, and a community facility.
8. Gugulethu displays non-residential growth in the centre of the Gugulethu local node which is also a mixed use area.



Map C4-b: Non-residential land use (floor space) in m² (2022)

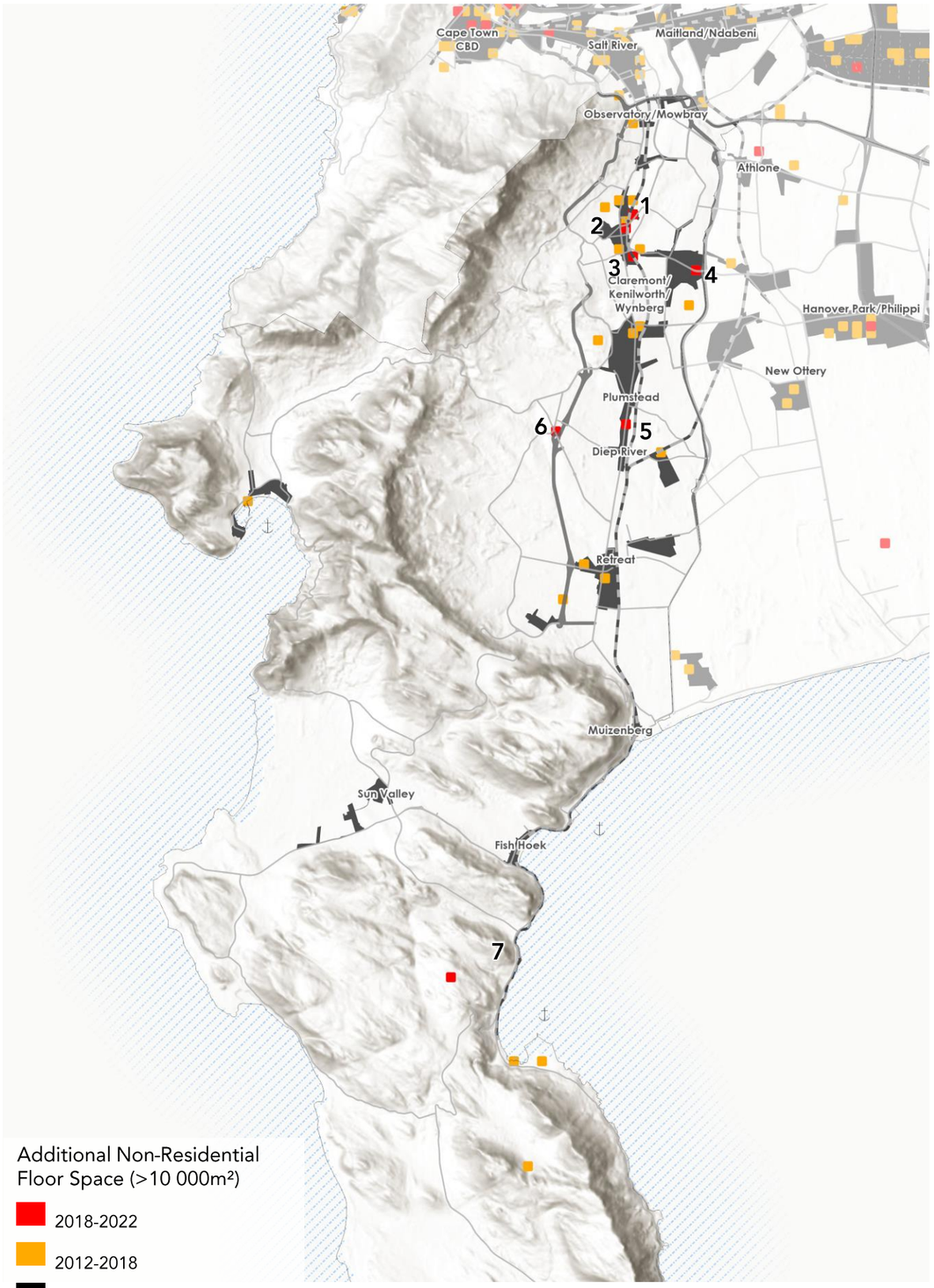
C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2022). 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, 2018, 2022



Map C4-a: Southern: Change in non-residential land use (floor space) in m² (2012 to 2022)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

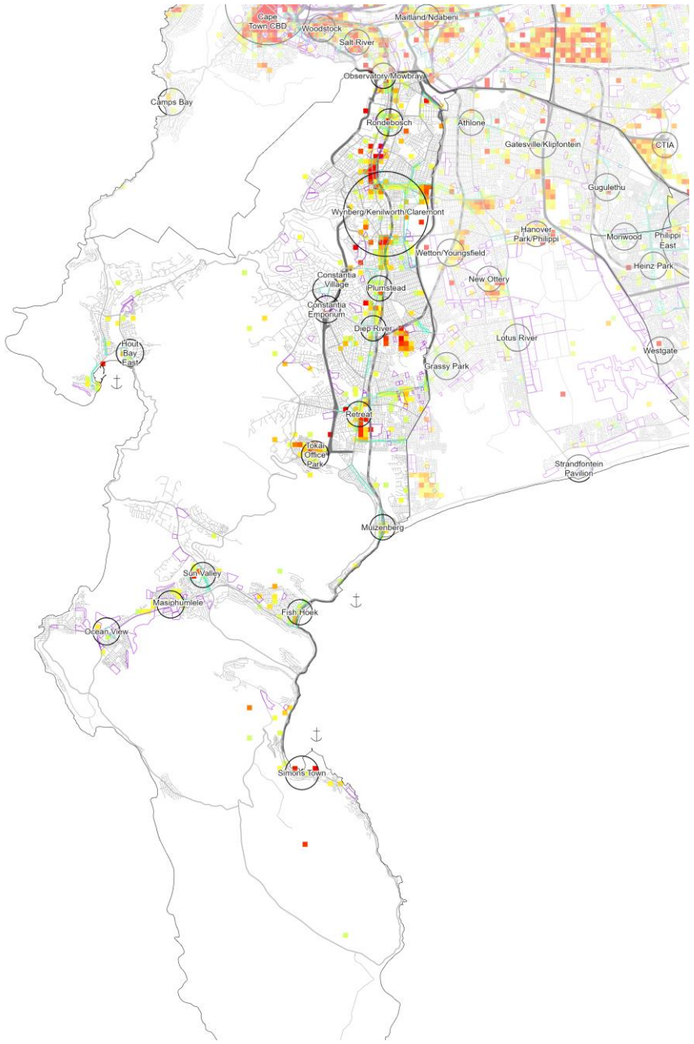
ALIGNMENT TO SPATIAL POLICY

Recent new non-residential land use has generally been in alignment with spatial policy re- identified future new development areas (NDAs). What is apparent however is how again (similarly to change 2012-2018) comparatively little additional larger-scale non-residential development has occurred in the district in the recent period.

LOCAL LEVEL TRENDS

Significant recent change in formal non-residential development in the Southern District has comprised the following:

1. Newlands Cricket Ground: Significant new office development, with some service retail, on under-utilised peripheral parts of the cricket stadium towards establishing a more financially sustainable cricket venue.
2. Claremont Boulevard: Large new mixed use development (on previously vacant land) comprising mainly new residential but also office on the ground floor.
3. Wilderness Road: Completion of significant additional office area comprising mainly of medical rooms associated with and supplementing the adjacent Kingsbury hospital.
4. Kenilworth Centre: Primarily an upgrade of the KC retail mall, inclusive mainly of a revamp, with limited additional floorspace, but significant additional parking area.
5. Diep River: A significant new retail mall on Main Road on a former cinema site.
6. Constantia Emporium: A new retail mini-mall development on a restitution site formerly vacant for many years, comprising an anchor grocery tenant along with a mix of small niche retail units.
7. Glencairn: 'Harbour Bay': A substantial new development in the context of the greater Simon's Town area on an old industrial site (old 'Marine Oil' site), and comprises new mixed development begun in 2017 and still ongoing. This includes retail, office, residential, and a small private-sector hospital.



Map C4-b: Southern: Non-residential land use (floor space) in m² (2022)

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

C.4

CHANGE IN NON-RESIDENTIAL LAND USE

KEY TAKE-AWAY TRENDS

- **Over the past decade, non-residential land uses increased by 13 million m² (from 40 million m² in 2012 to 53 million m² in 2022). This change largely occurred in existing industrial and business areas, reinforcing existing spatial patterns and concentrations of land uses.** 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. There continues to be a low interest of formal non-residential land uses in the Metro South East where residential land uses dominates. Hence the poorest residents in Cape Town still have to travel to existing economic and industrial areas for employment. A few local suppliers of household commodities did move into the area.

- The **greatest increase in non-residential development occurred within the city's development corridors** (along the N7 in a northern direction, along Voortrekker Road (west to east) and in a southern direction on the Southern Corridor). **Key employment nodes continued to attract new non-residential land uses or changes in existing floor area** (CT CBD, Century City, Bellville, Epping, Somerset West CBD, Blue Downs and CTIA).

- The **CBD, Foreshore, V&A Waterfront, Bellville area, Killarney Gardens, Montague Gardens** and a handful of other locations (such as Brackengate and Blackheath in Kuilsriver/ Brackenfell, Parow as well as Airports Industria (south-west of Bellville and the Cape Town International Airport)), experienced significant increase in non-residential development between 2012 and 2022.

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.5a

LAND AND BUILDING DEVELOPMENT
DIVERSITY OF USE

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 and 2022). 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, 2018, 2022

OVERALL TREND

Map C5a-a indicates the change in the ratio between residential and non-residential land uses, and map C5a-b indicates the land use diversity in 2022. 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.

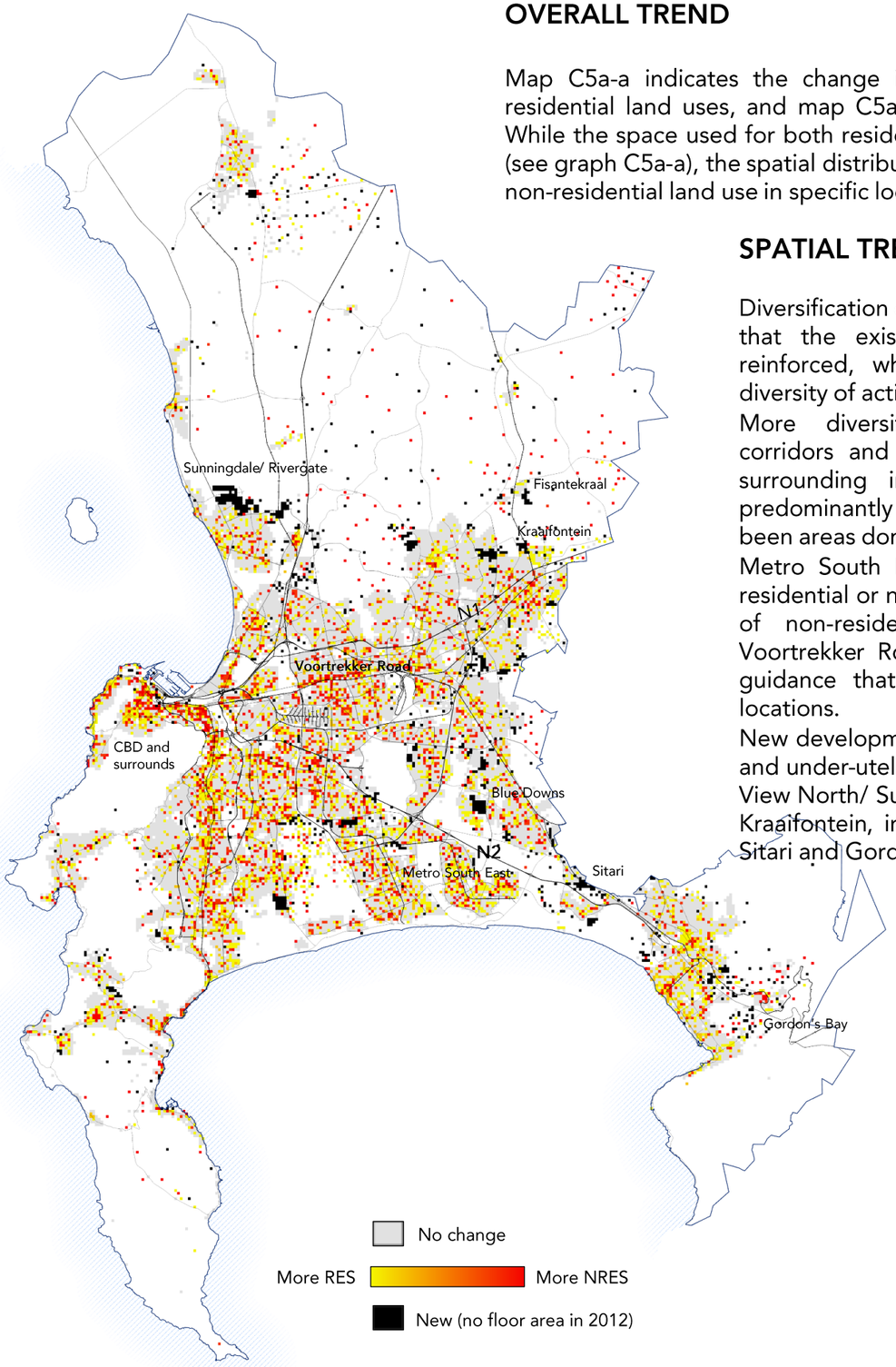
SPATIAL TREND (DISTRIBUTION/ PATTERN)

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.

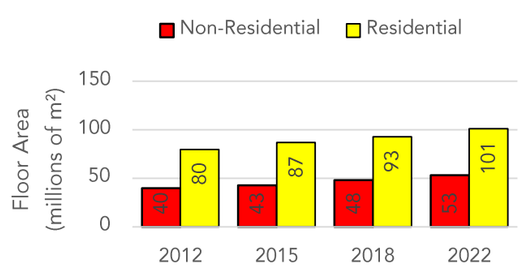
More diversification occurred around development corridors and in nodes. Development in the CBD and surrounding inner city areas has (since 2012) been predominantly residential uses, in what have historically been areas dominated by non-residential land uses.

Metro South East show a mix with areas increasing in residential or non-residential nature. Certain concentrations of non-residential land uses developed further on Voortrekker Road. These observations align with policy guidance that seeks to diversify land use in strategic locations.

New developments (black on map C5a) occurred on vacant and under-utelised land and obvious growth is visible Table View North/ Sunningdale and Rivergate, as well as north of Kraaifontein, in Fisantkraal, concentrations in Blue Downs, Sitari and Gordon's Bay.



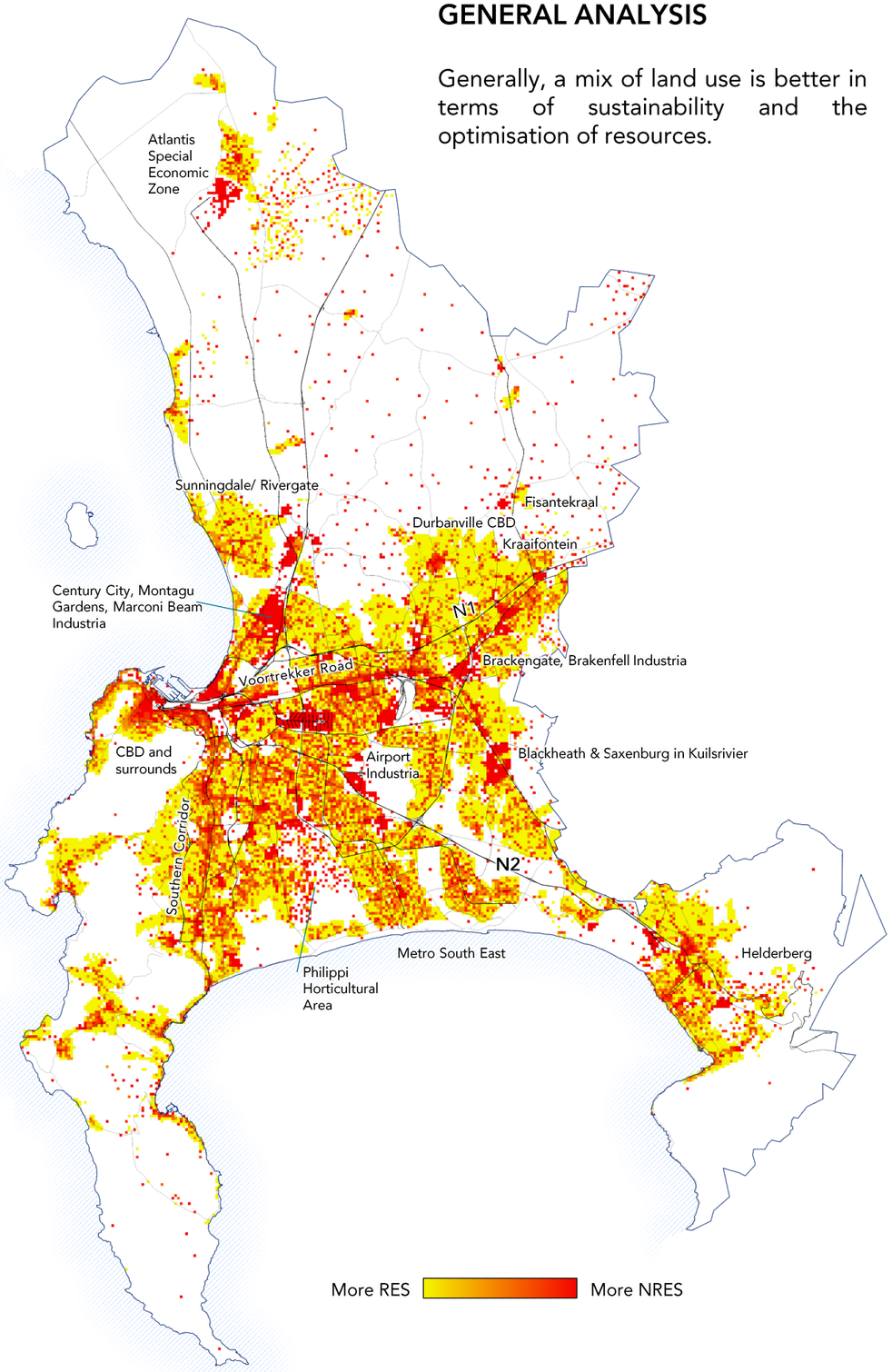
Map C5a-a: Change in land use diversity (2012 to 2022)



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

GENERAL ANALYSIS

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



Map C5a-b: Residential v Non-Residential land use (2022)

C.5b

LAND AND BUILDING DEVELOPMENT

DIVERSITY OF USE WITHIN SPATIALLY TARGETED AREAS

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 General Valuations Roll (2012 vs. 2022) within areas spatially targeted for development in 2023. Data is aggregated by using a square grid comprised of 4 ha grid cells.

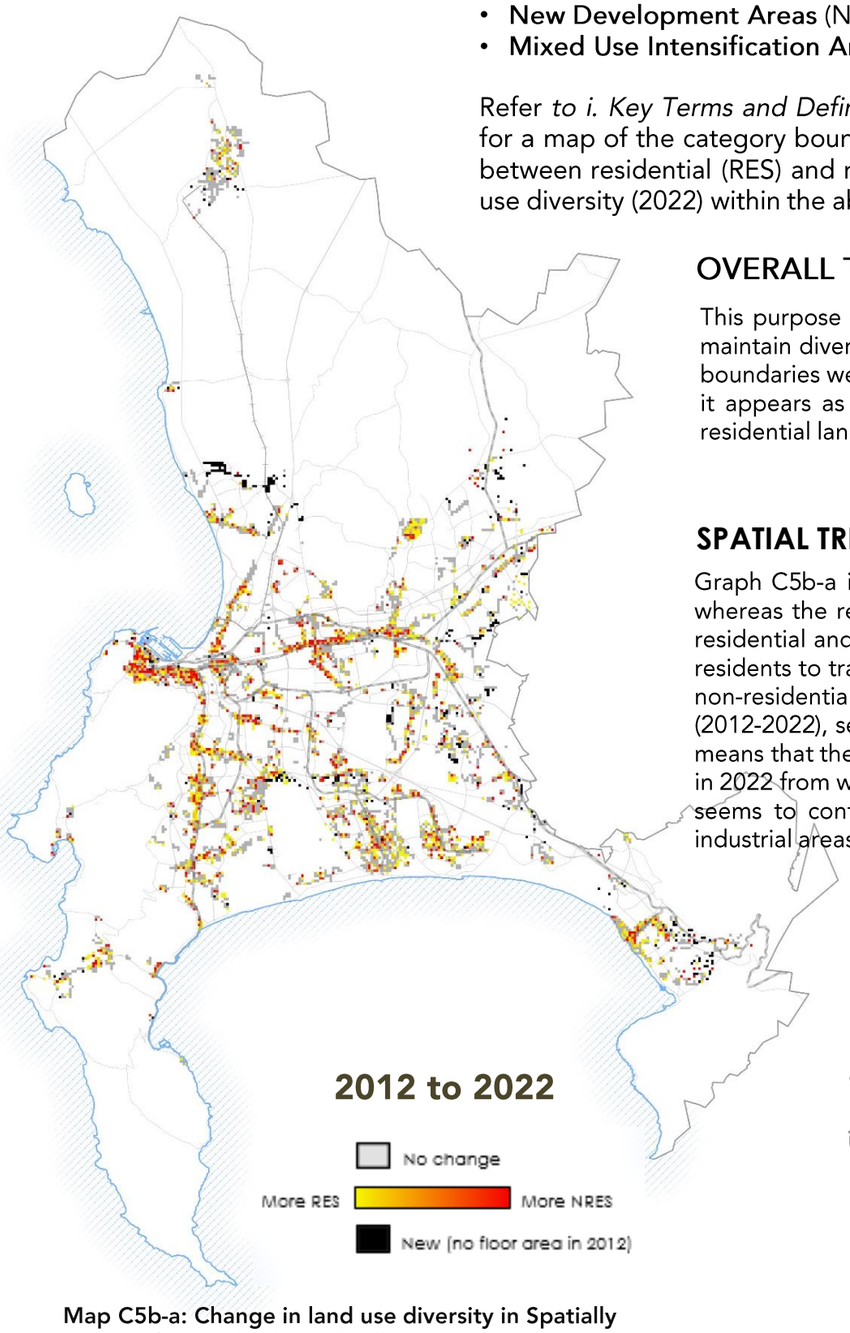
Data Source: Valuations & Urban Planning & Design Department, CCT

OVERVIEW

The 2023 District Spatial Development Framework **policies promote development and public investment in** what are known collectively as "**Spatially Targeted Areas**" (STAs). These include:

- **Development Focus Areas** (DFAs)
- **New Development Areas** (NDAs)
- **Mixed Use Intensification Areas** (MUIAs)

Refer *to i. Key Terms and Definitions* in the report for a description of each and to *indicator C.2b* for a map of the category boundaries. Map C5b-a indicates the change in the ratio (2012 to 2022) between residential (RES) and non-residential (NRES) land uses and Map C5b-b indicates the land use diversity (2022) within the above areas.



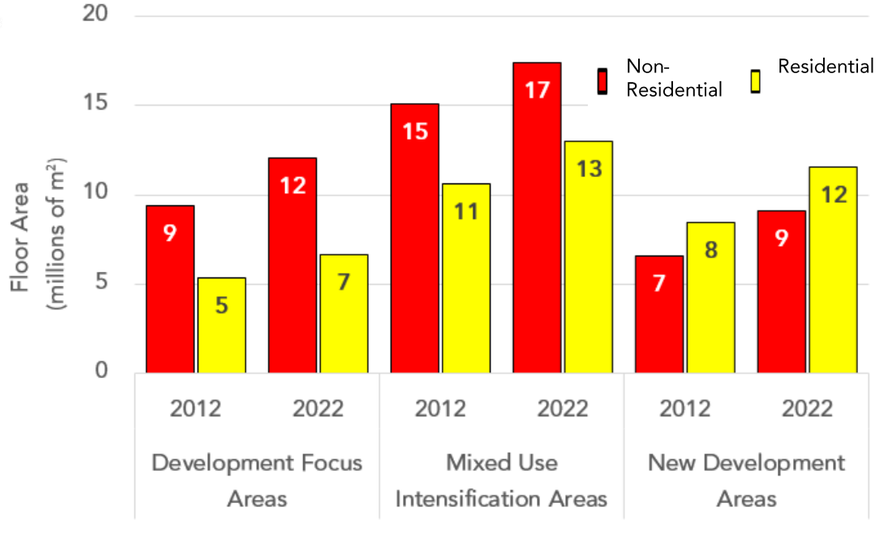
Map C5b-a: Change in land use diversity in Spatially Targeted Areas (2012 to 2022)

OVERALL TREND

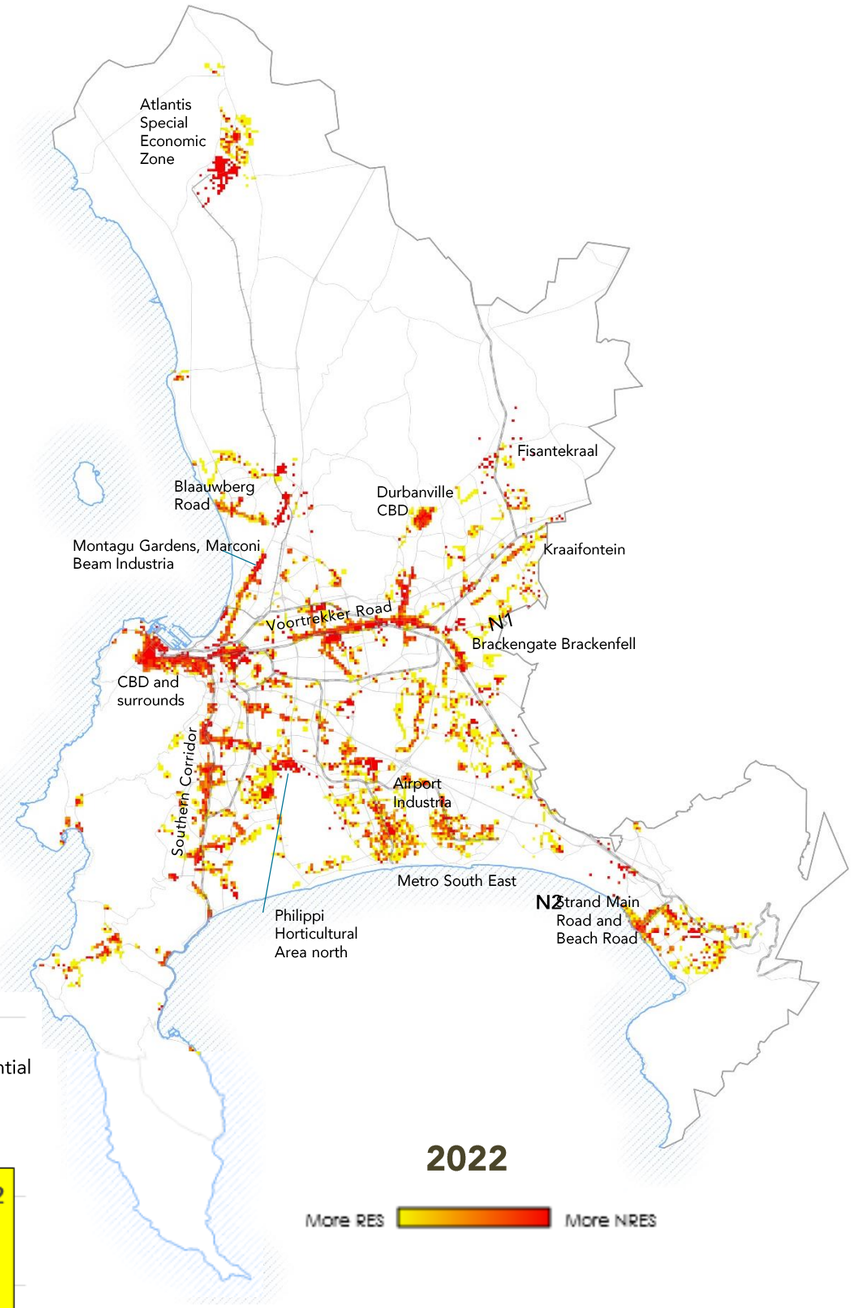
This purpose of this indicator is to determine whether existing policies to establish or maintain diversity of land use in these strategic locations, were effective. Before the STA boundaries were delineated in 2023, there was already diversity of use and from analysis it appears as if there continues to be a steady increase in both residential and non-residential land use types in all of these locations (2012 – 2022).

SPATIAL TREND (DISTRIBUTION/PATTERN)

Graph C5b-a indicates that the NDAs have a greater proportion of residential land use whereas the reverse is true in the DFAs and MUIAs. Generally, a mix of land use (equal residential and non-residential) land uses, have the potential to reduce the need for local residents to travel to jobs and services. NDA's seems to have almost equal residential and non-residential land uses. The proportion of growth in floor areas in both DFA and MUIAs (2012-2022), seems to be equal for residential and non-residential land uses. This typically means that the character in these areas being monitored, is not changing away completely in 2022 from what it was in 2012. It also means that areas known to be residential in nature seems to continue to have those dominant land uses and similar for commercial and industrial areas (non-residential).



Graph C5b-a: Change in non-residential to residential ratio



Map C5b-b: Residential vs Non-Residential land use in Spatially Targeted Areas (2022)

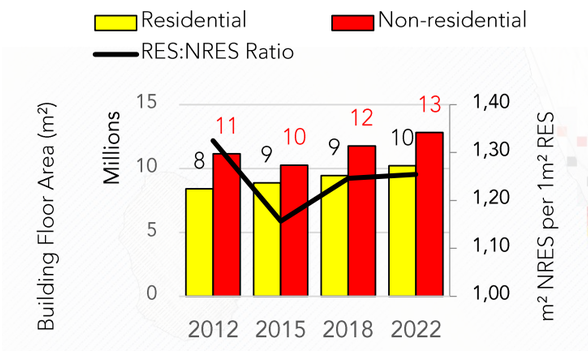
C.5c

LAND AND BUILDING DEVELOPMENT

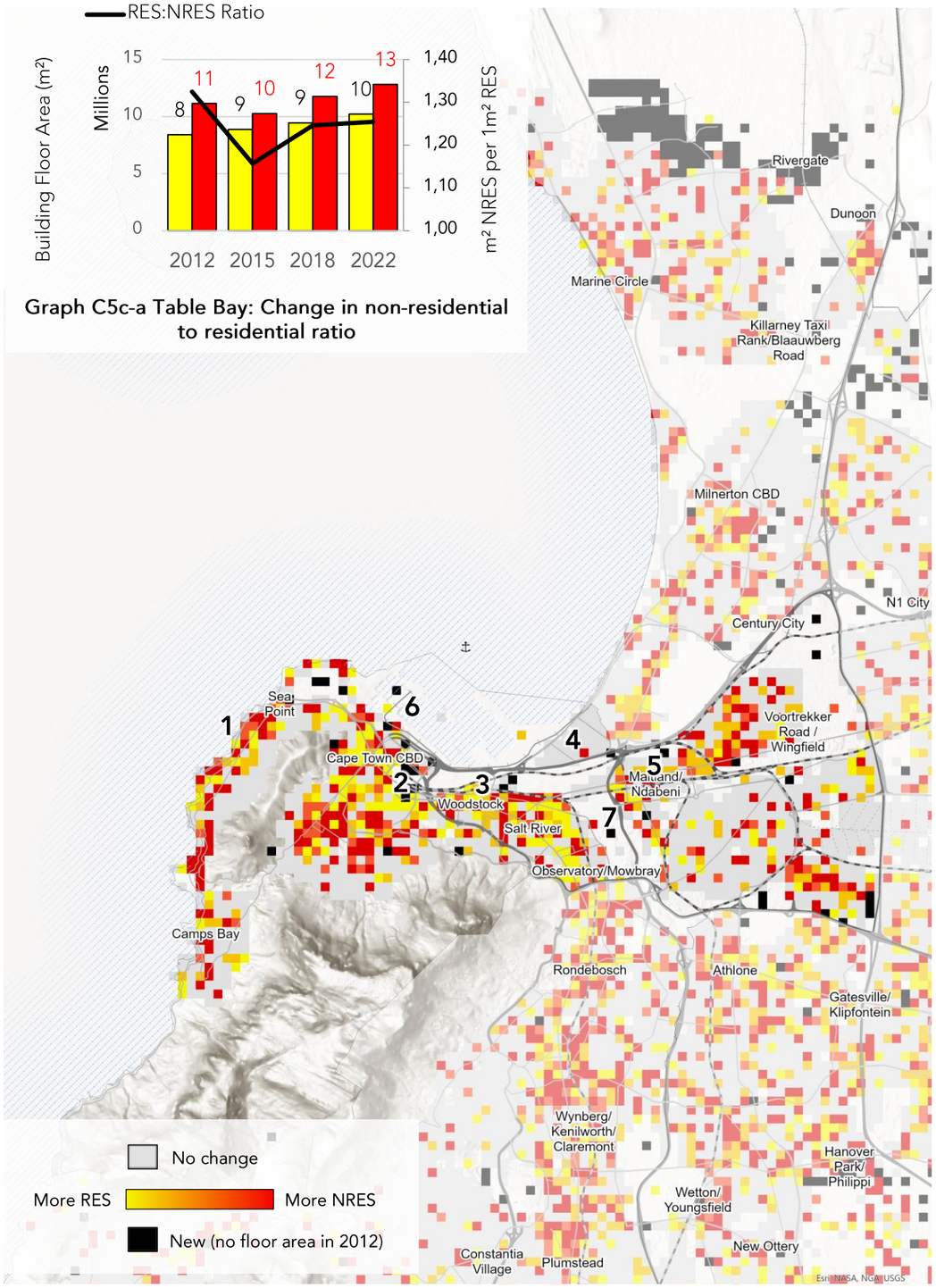
DIVERSITY OF USE (DISTRICT)

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)



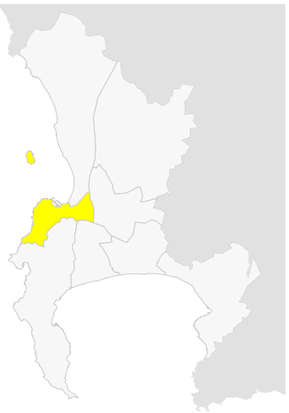
Graph C5c-a Table Bay: Change in non-residential to residential ratio



Map C5c-a: Table Bay: Change in land use diversity (2012 to 2022)

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)



ALIGNMENT TO SPATIAL POLICY

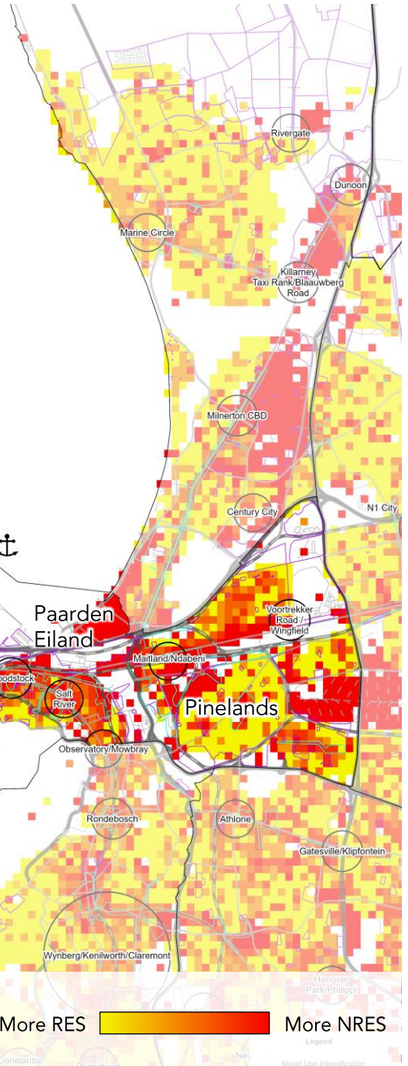
The change in land use between 2012 and 2022 correlates with areas identified for mixed-use intensification. It can be noted that the changes occurred mostly along higher- and lower-order development corridors and nodes where mixed-use intensification is supported.

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. Atlantic Seaboard - more hotels and apartment hotels such as Station House and O'Two.
2. CBD/Foreshore – Grade 3 office conversion to residential are in construction e.g. Netcare Christian Barnard; Zeeland Pier, The Mutual on Strand Street. Harbour Arch development is continuing – significant residential developments moving into a previously precinct known for non-residential (office, motor sales). The Rubik and The Fynbos are adding significant residential to a traditional office precinct.
3. Woodstock – redevelopment of historic and dilapidated buildings and sites continues, driven by student housing, apartments and land release for affordable housing.
4. Paarden Eiland – Maritime Place construction mixed use development has been sold as luxury apartments.
5. 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.
6. Waterfront – Granger Bay rezoning application, significant additional bulk in the precinct expected.
7. River Club – now under construction, 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 C5c-b: Table Bay: Residential vs Non-Residential land use (2022)

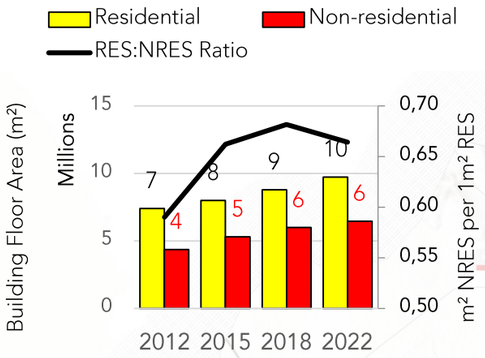
C.5c

LAND AND BUILDING DEVELOPMENT

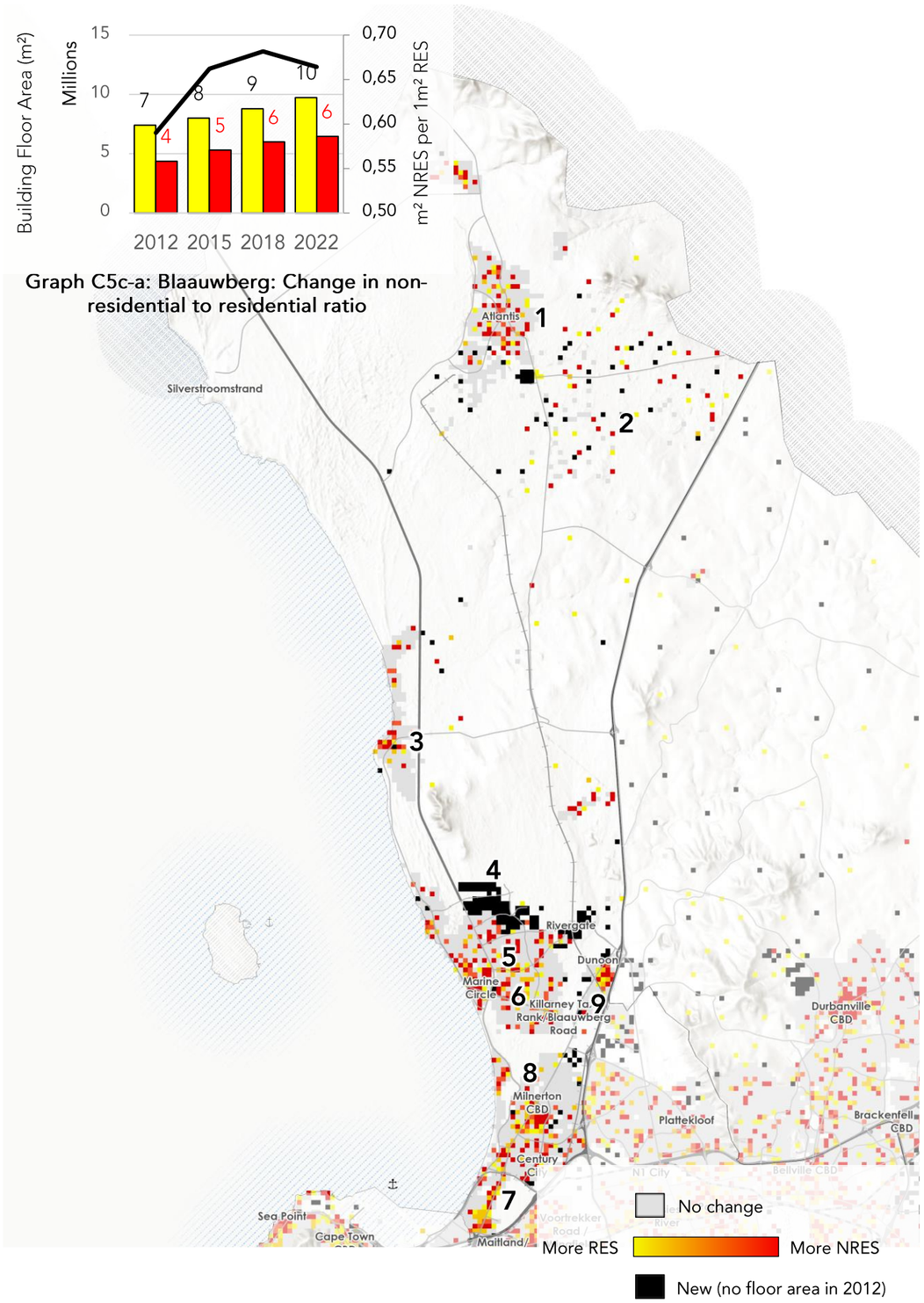
DIVERSITY OF USE (DISTRICT)

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)



Graph C5c-a: Blaauwberg: Change in non-residential to residential ratio



Map C5c-a: Blaauwberg: Change in land use diversity (2012 to 2022)

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

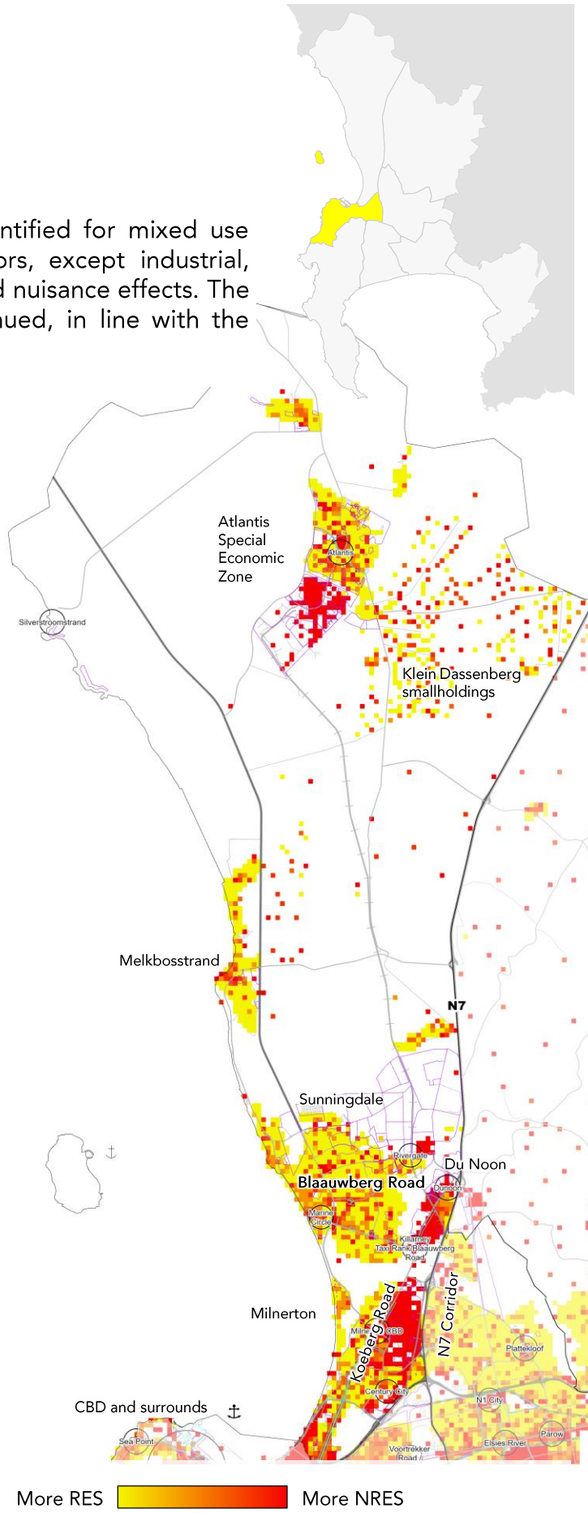
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2022 correlates with areas identified for mixed use intensification. Generally, diversification is happening in nodes and corridors, except industrial, because of the more strict zoning, location of major hazardous installations and nuisance effects. 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 C5c-b: Blaauwberg: Residential vs Non-Residential land use (2022)

C.5c

LAND AND BUILDING DEVELOPMENT

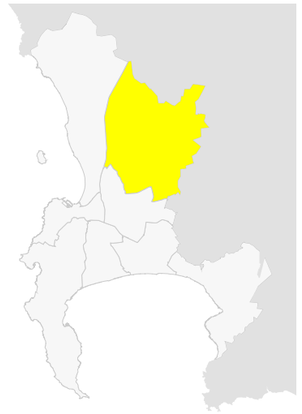
DIVERSITY OF USE (DISTRICT)

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)



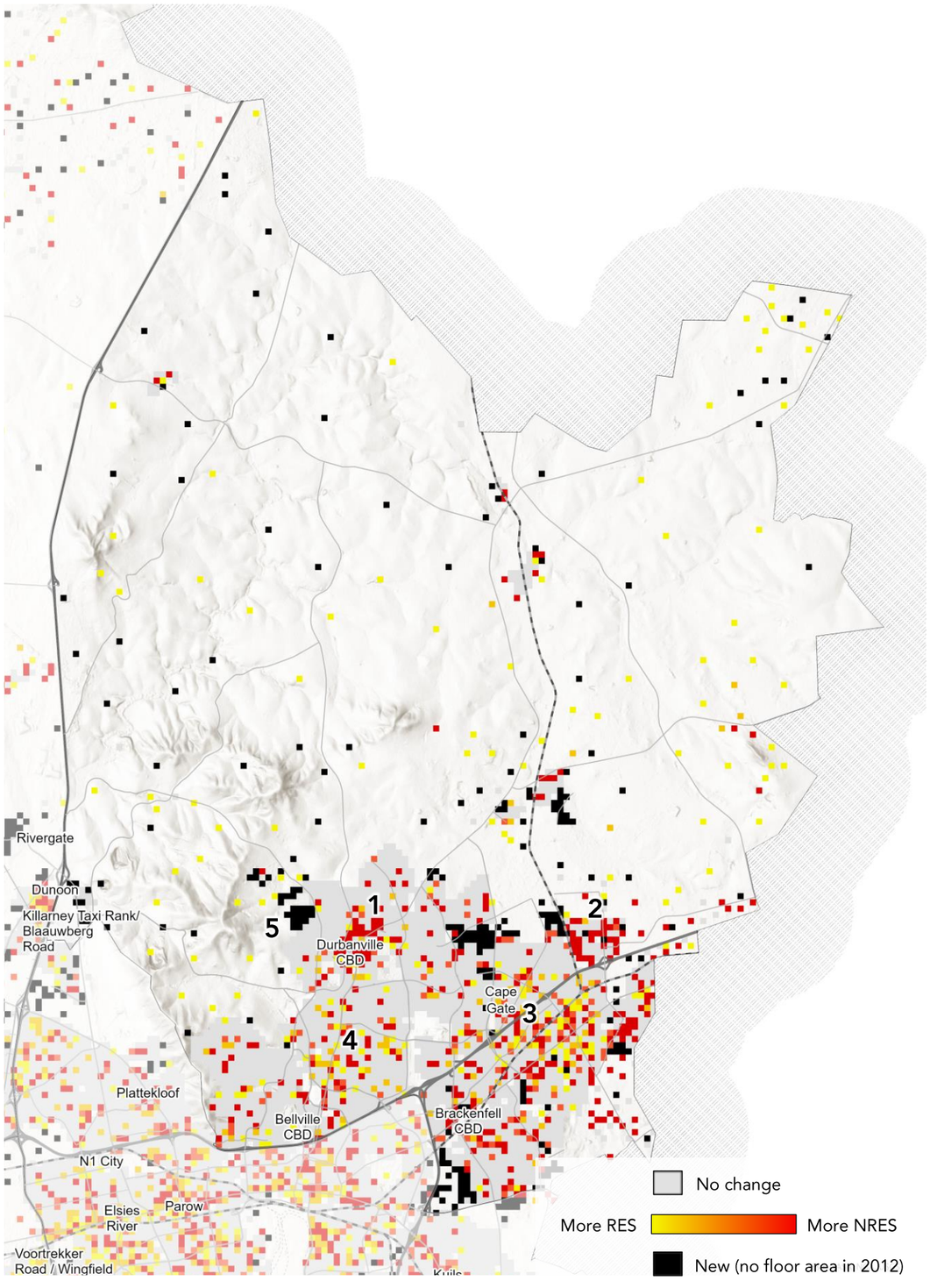
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2022 correlates with areas identified for mixed-use intensification as ascribed to proposals in the 2012 Northern District Plan.

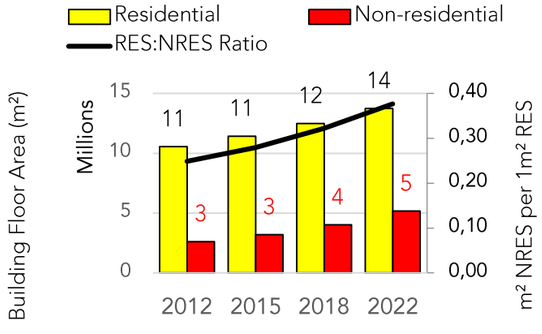
LOCAL LEVEL TRENDS

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

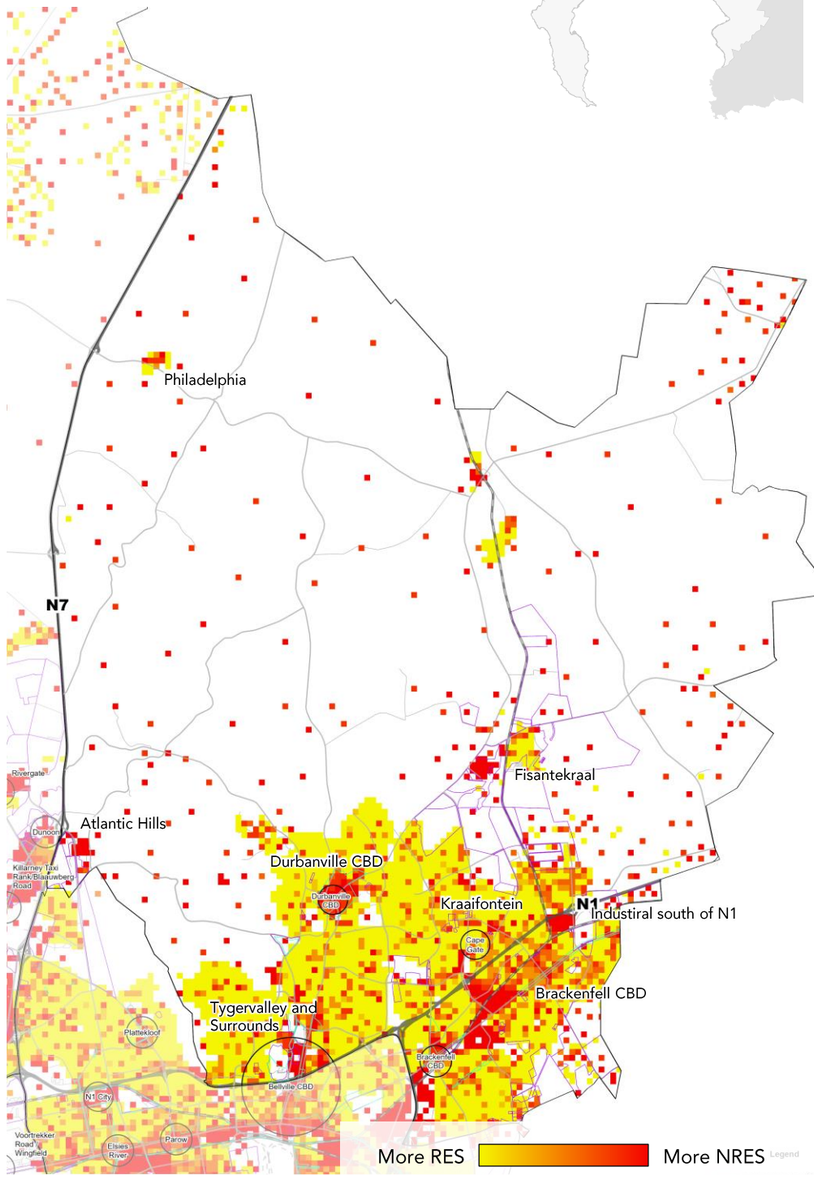
1. Durbanville secondary CBD - Change from SR1 to either GR1- 3 (group housing), and/or commercial at ground level, and higher-density residential (flats) on top, as prescribed in sub-district development guidelines. Implementation since 2012.
2. Joostenbergvlakte smallholdings – Widespread and significant 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. Mix of different land uses along the Old Paarl Road development corridor. Proposals for small-scale offices in Aurona and Springbok Park (Brackenfell) as prescribed by policy guidelines adopted by Bergdal Subcouncil (2) are being implemented.
4. Rosenpark (Bellville) - Change from remaining SR1 to commercial.
5. Lower density development in Clara-Anna Fontein. Land use approvals in place – implementation underway.



Map C5c-a: Northern: Change in land use diversity (2012 to 2022)



Graph C5c-a: Northern: Change in non-residential to residential ratio



Map C5c-b: Northern: Residential vs Non-Residential land use (2022)

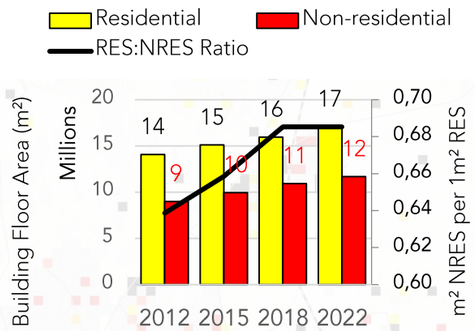
C.5c

LAND AND BUILDING DEVELOPMENT

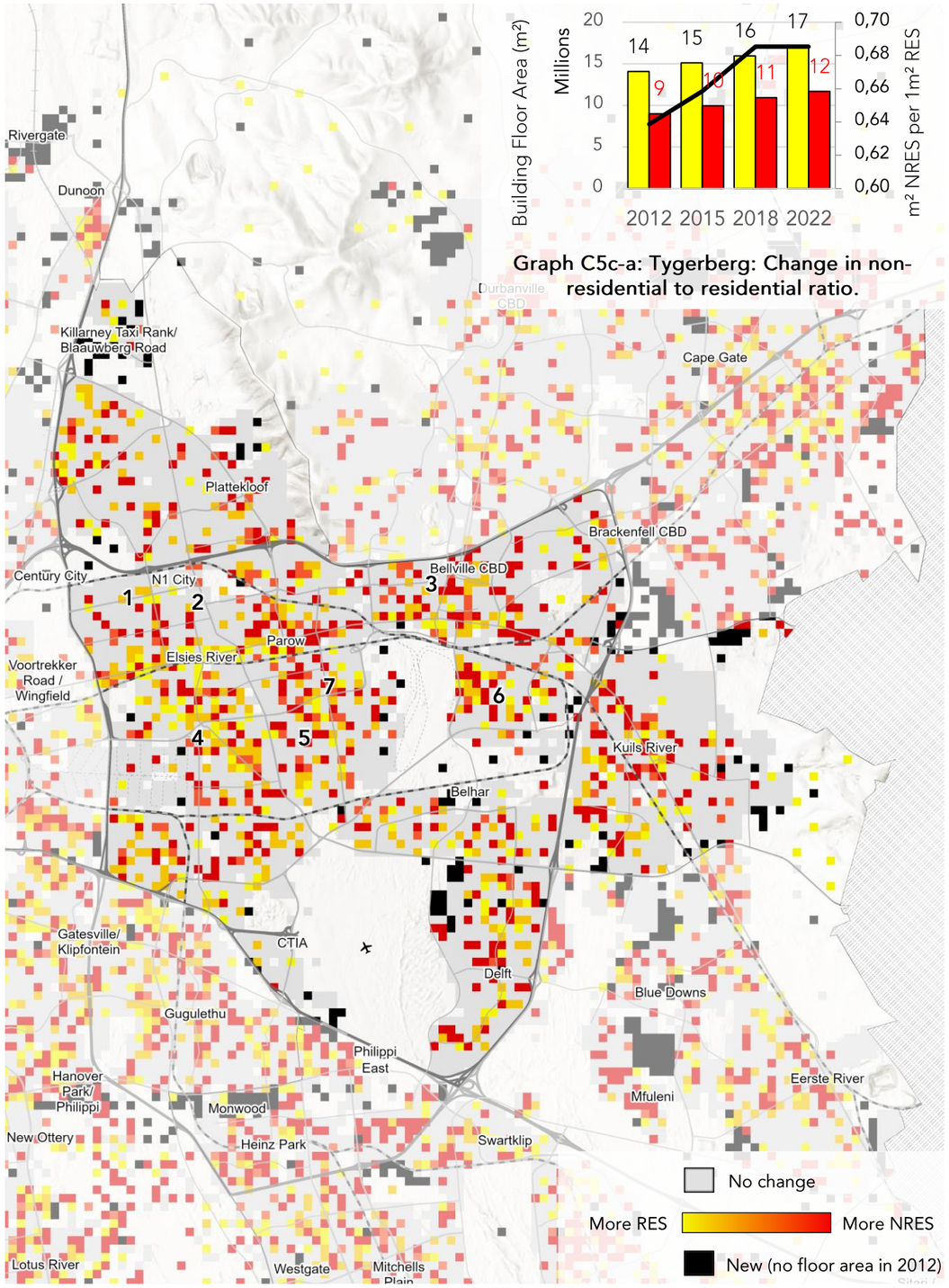
DIVERSITY OF USE (DISTRICT)

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)



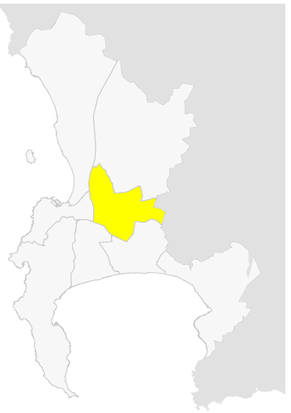
Graph C5c-a: Tygerberg: Change in non-residential to residential ratio.



Map C5c-a: Tygerberg: Change in land use diversity (2012 to 2022)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



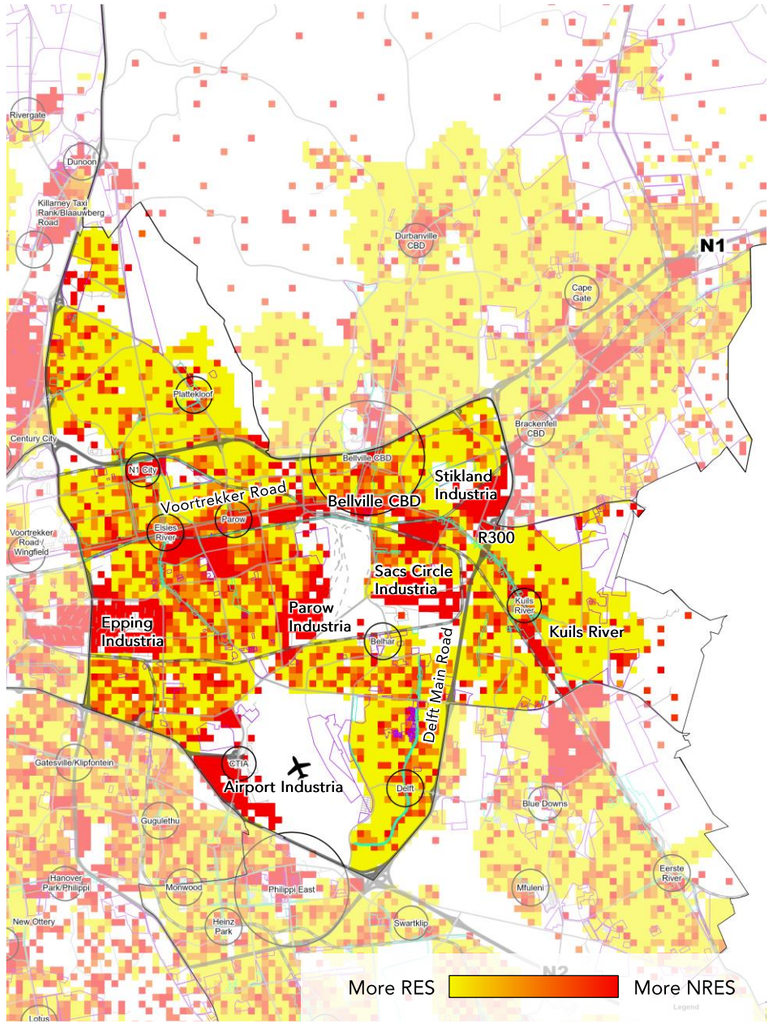
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2022 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). 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.



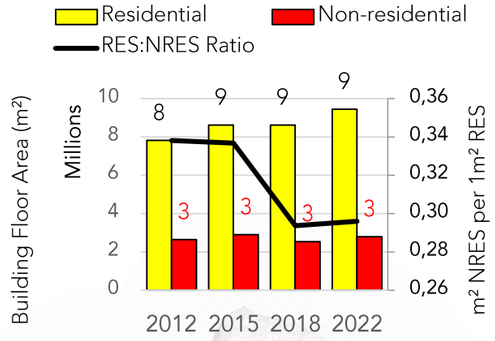
Map C5c-b: Tygerberg: Residential vs Non-Residential land use (2022)

C.5c

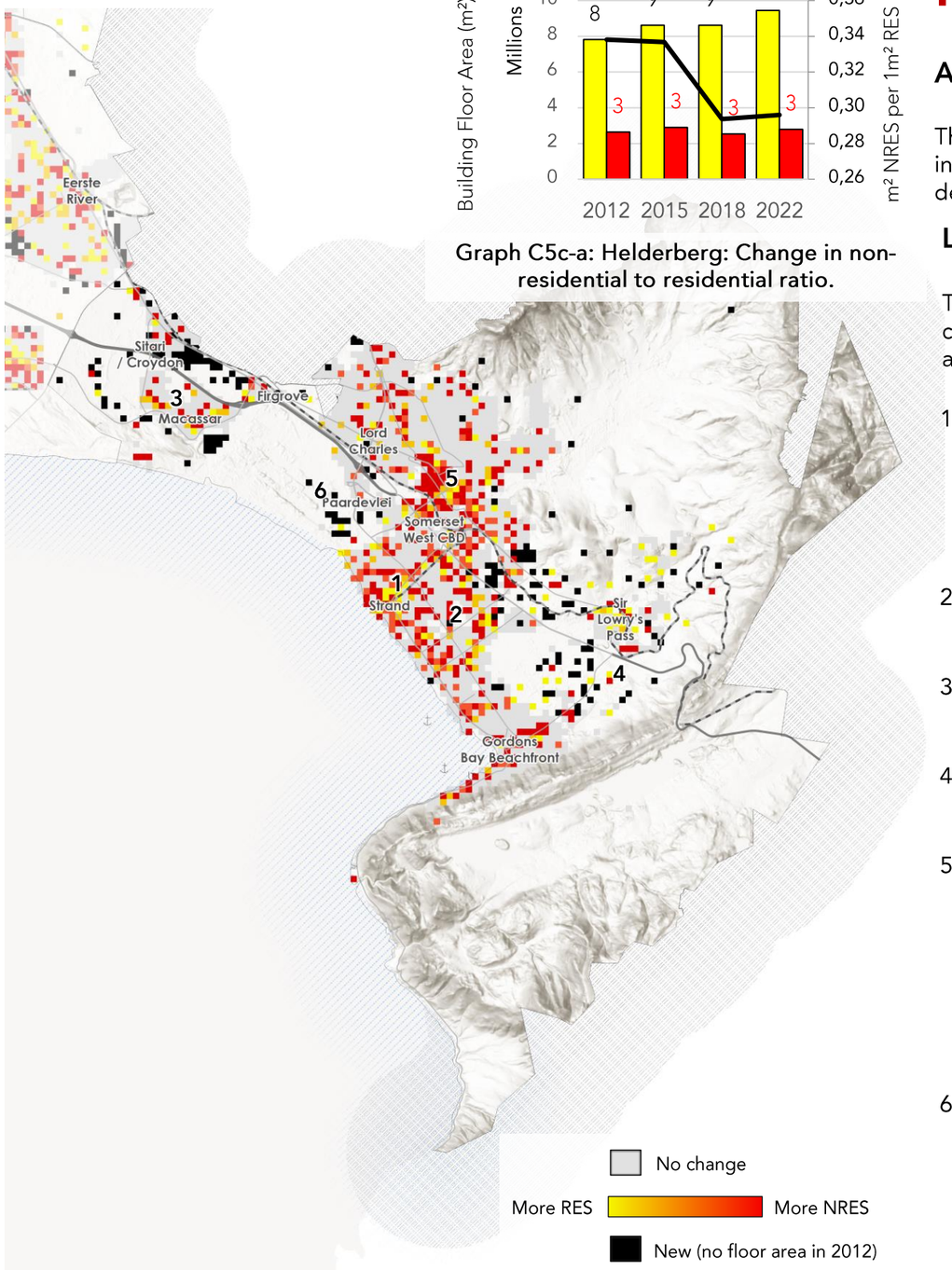
LAND AND BUILDING DEVELOPMENT
DIVERSITY OF USE (DISTRICT)

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)



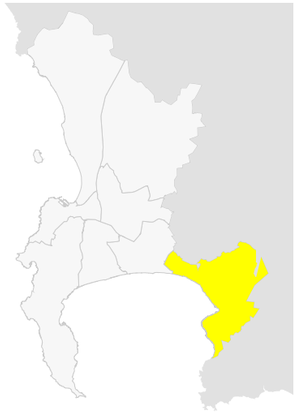
Graph C5c-a: Helderberg: Change in non-residential to residential ratio.



Map C7c-a: Helderberg: Change in land use diversity (2012 to 2022)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)



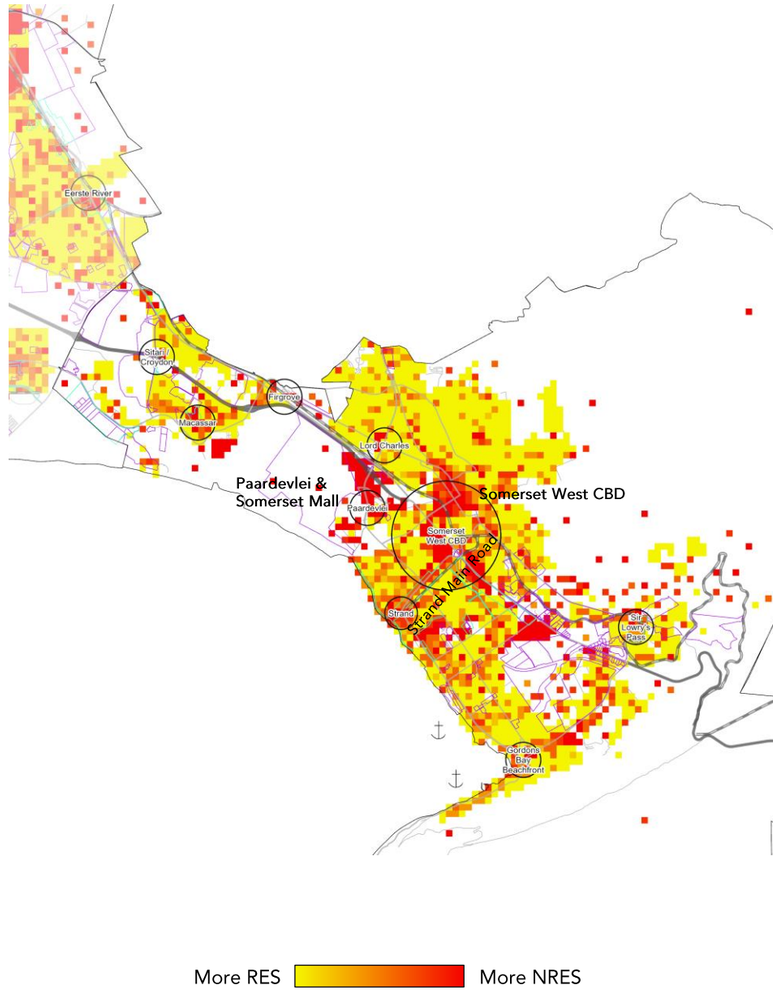
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2022 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 C5c-b: Helderberg: Residential vs Non-Residential land use (2022)

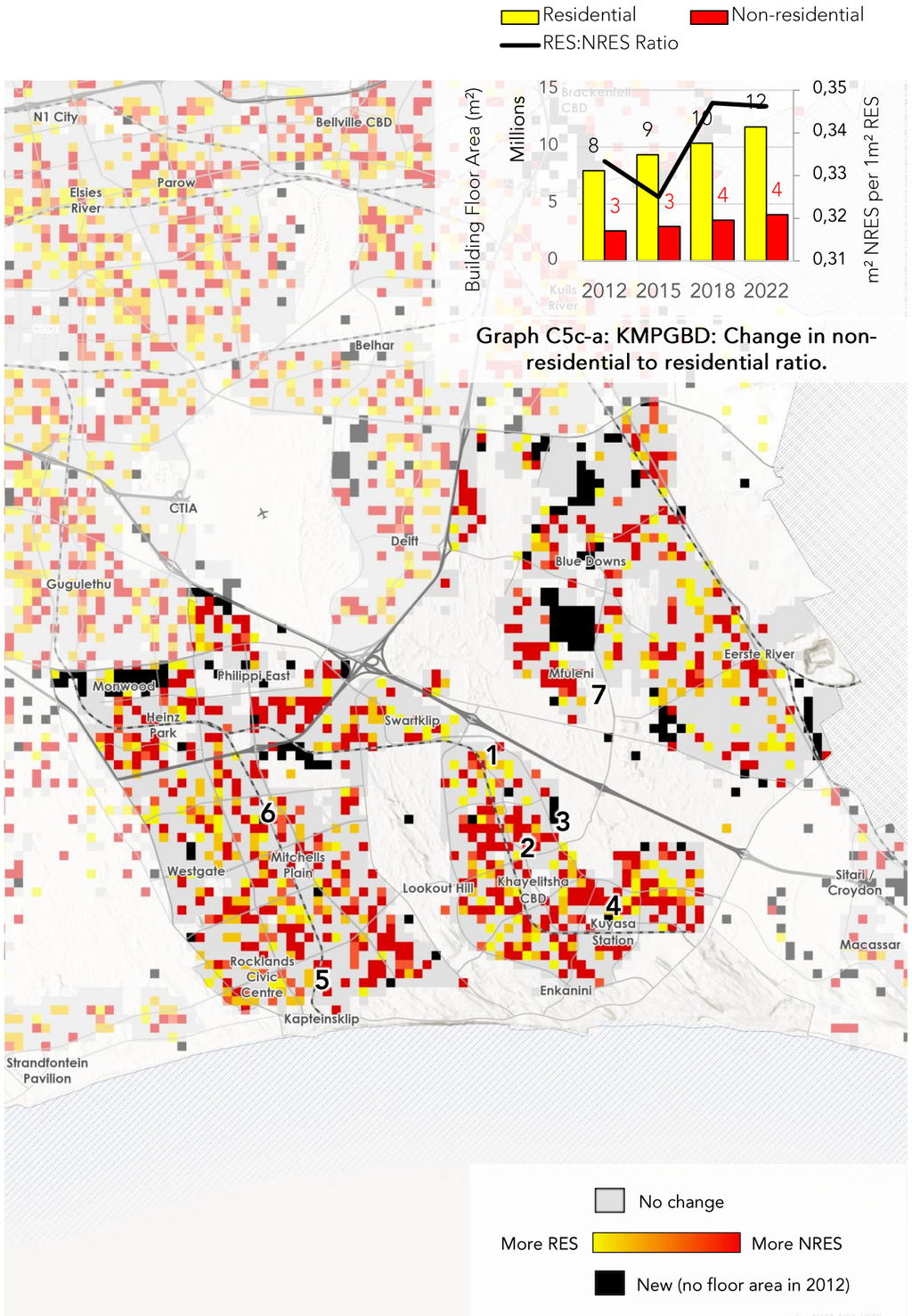
C.5c

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)

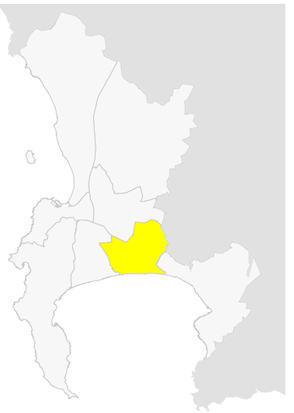


Map C5c-a: KMPGBD: Change in land use diversity (2012 to 2022)

Graph C5c-a: KMPGBD: Change in non-residential to residential ratio.

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)



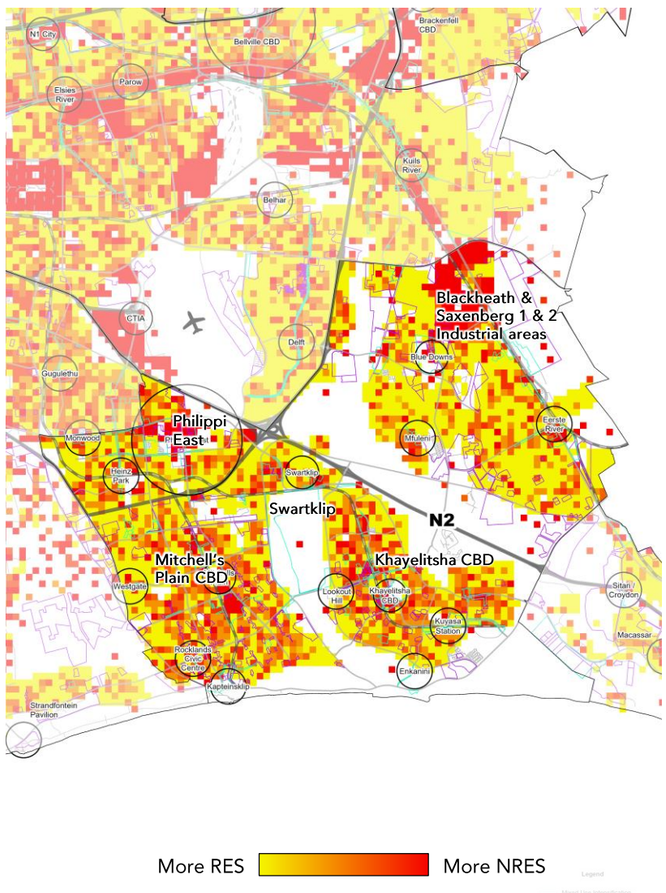
ALIGNMENT TO SPATIAL POLICY

Theoretically 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 respond positively to mixing up residential and non-residential. 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. Land Use diversity changes map C5c-a, 2012-2022) shows a rather dispersed pattern of increases in non-residential, more so than residential – but not a strong concentration in key corridors or nodes. The large number of departure and consent use approvals to allow retail in residential dwellings is visible with limited concentrations.

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 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 C5c-b: KMPGBD: Residential vs Non-Residential land use (2022)

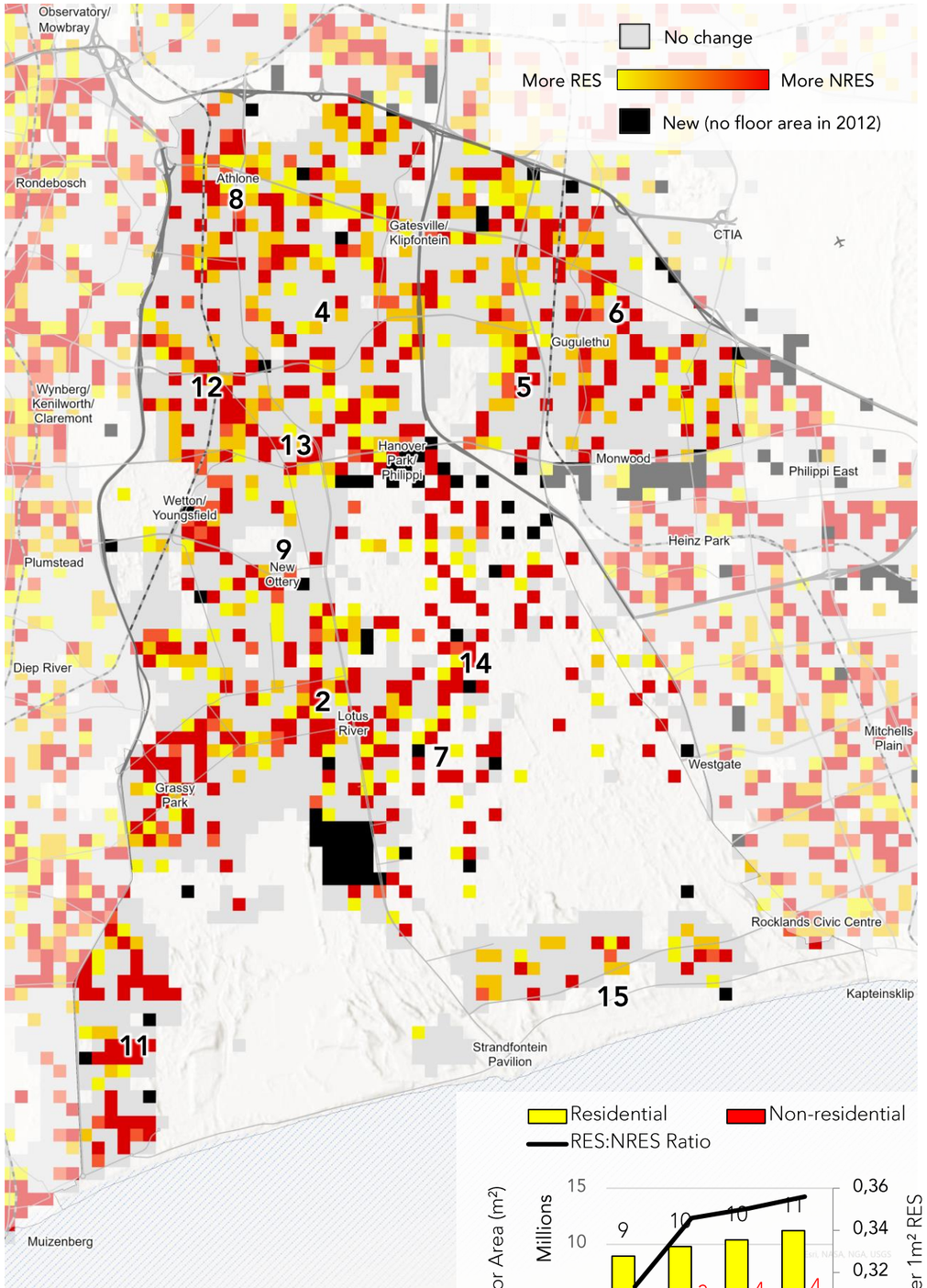
C.5c

LAND AND BUILDING DEVELOPMENT

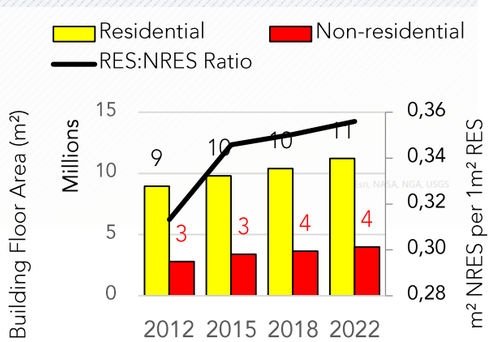
DIVERSITY OF USE (DISTRICT)

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)



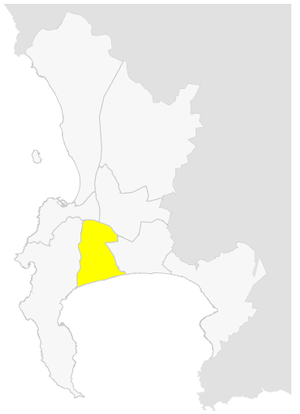
Map C5c-a: Cape Flats: Change in land use diversity (2012 to 2022)



Graph C5c-a: Cape Flats: Change in non-residential to residential ratio

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)



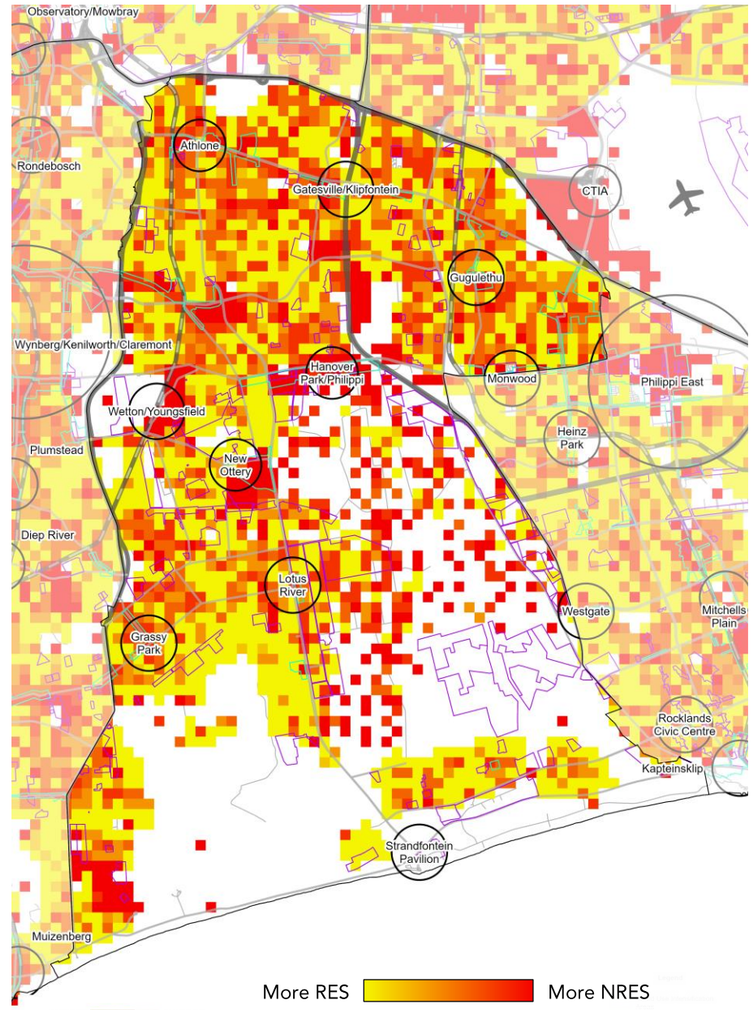
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2022 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. The Grassy Park nodal area has seen an increase in diversity, but portions along Klip Road are also showing increased diversity (not aligned to an SPC.)
2. Similarly, Lotus River also shows increased diversity not aligned to an SPC.
3. Klipfontein Road corridor has an increase in diversity with a particular increase in residential development in the Rylands/Silvertown MUIA and increase in the mix of uses around Belgravia Road in Athlone.
4. In Penlyn there is a significant shift from only residential to non-residential uses in areas such as
5. Manenberg displays similar trends to annotation 4 above.
6. Gugulethu displays similar trends to annotation 4 above.
7. Schaapkraal displays similar trends to annotation 4 above.
8. Athlone sees a significant number of NRES applications completed in 2018/19.
9. Ottery also sees many NRES applications, like Athlone above. Some include industrial buildings.
10. Office plans submitted and completed have been consistent since 2017 in areas such as Athlone (8) and Ottery (9).
11. Capricorn Park has had applications submitted and completed for industrial buildings.
12. Lansdowne displays similar trends as per annotation 11.
13. Wetton, Lansdowne Industrial had a high number of NRES applications prior to 2020.
14. PHA core – There is an increase in the utilities in the area. There has also been an increase in developments for tourism related activates, agri-industry storage facilities and farm labourer accommodation.
15. Strandfontein has seen an increase in utility services; one to the south of Baden Powell, and one along the Punt Road reserve, northeast of the wastewater treatment facility.



Map C5c-b: Cape Flats: Residential vs Non-Residential land use (2022)

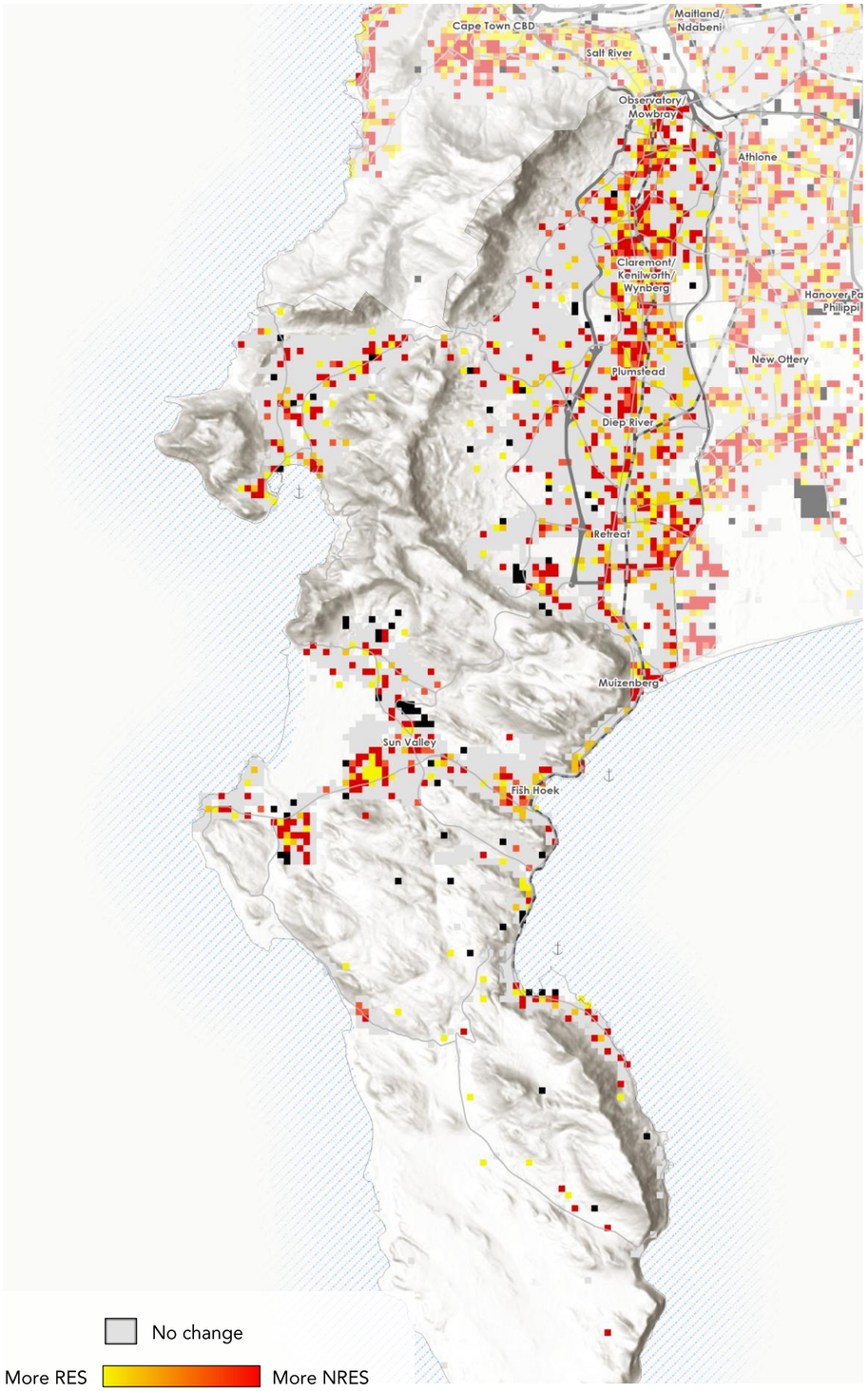
C.5c

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.

Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022)



Map C5c-a: Southern: Change in land use diversity (2012 to 2022)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

ALIGNMENT TO SPATIAL POLICY

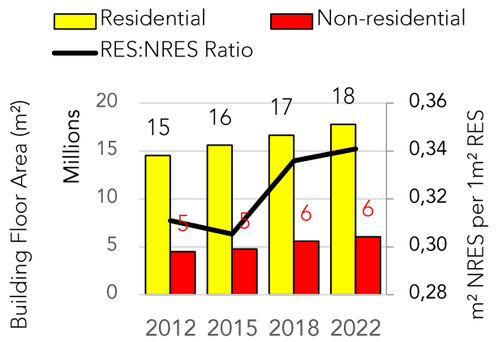
The change in land use between 2012 and 2022 generally correlates with areas identified for mixed-use intensification, mostly along higher- and lower-order development corridors and within urban nodes where mixed-use intensification is supported.

LOCAL LEVEL TRENDS

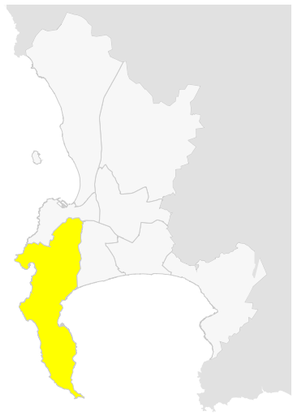
The section below highlights the areas where a significant change in land use was observed. Generally well-balanced diversity is confined to within the Main Road corridor, and new development on vacant land generally limited and confined to peripheral areas of the district.

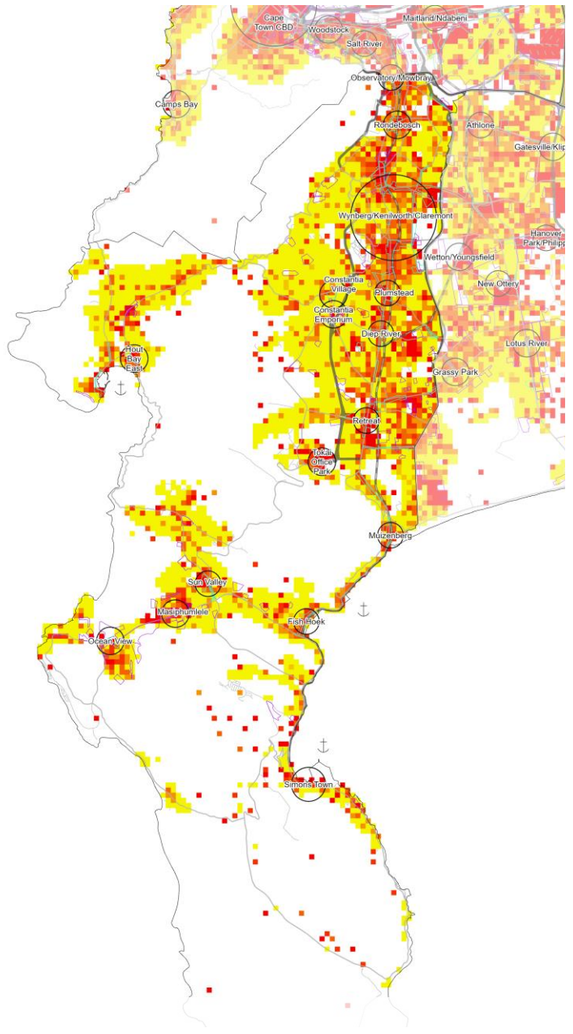
The following provides additional detail:

1. Most new development has occurred within the Main Road corridor. This has generally included a balanced diversity of growth between residential and non-residential development.
2. Generally larger scale redevelopment has occurred in the northern part of this corridor, and primarily within or close to the urban nodes or Main Road itself.
3. Most redevelopment within the above nodes (i.e. Mowbray, Rondebosch, Claremont and Wynberg) has comprised upgraded retail (especially small-scale convenience) and service retail (coffee shops, eateries etc) on the ground floor (to service more local residential) with multi-storey small-unit student accommodation above.
4. Most redevelopment between these nodes has comprised upper-middle to high-income 3-5 storey flats catering to a changing household profile (1 and 2 person households, attraction to security and dynamic mixed-use urban nodes, & proximity to schools etc re- increasing traffic congestion).
5. Non-residential development outside of the business areas, across the district, has generally been limited in scale and confined mainly to service related activities such as medical facilities (rehabs etc), educational facilities (small private schools, colleges, creches etc.), and tourism related facilities (restaurants etc.). This accords strongly with the high levels of opposition to non-residential development such as conventional commercial (retail and office) encroachment into exclusively residential areas.
6. There has nevertheless been some small-scale office and retail development outside of old/traditional business precincts. This has largely been within or close to peripheral area local and neighbourhood urban nodes (e.g. in Constantia, Noordhoek, Imhoffs Gift) or in strategically located historical precincts (e.g. Alphen, Dreyersdal farm) in response to demand for small, more proximate, high-value office and retail units.
7. Claremont has continued to grow in significance as a regional financial hub, with significant additional high-grade office space.



Graph C5c-a: Southern: Change in non-residential to residential ratio





Map C5c-b Southern: Residential vs Non-Residential land use (2022)

C.5d

LAND AND BUILDING DEVELOPMENT

DIVERSITY AND INTENSITY OF USE

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, 2022 (formal activities/land use only). Data is aggregated by using a square grid comprised of 4ha (200m x 200m) grid cells.

Source: CCT Valuation Roll 2022



Map C5d-a: Areas with diverse land use



Map C5d-b: Building density



Map C5d-c: Non-residential intensity



Map C5d-d: Residential density

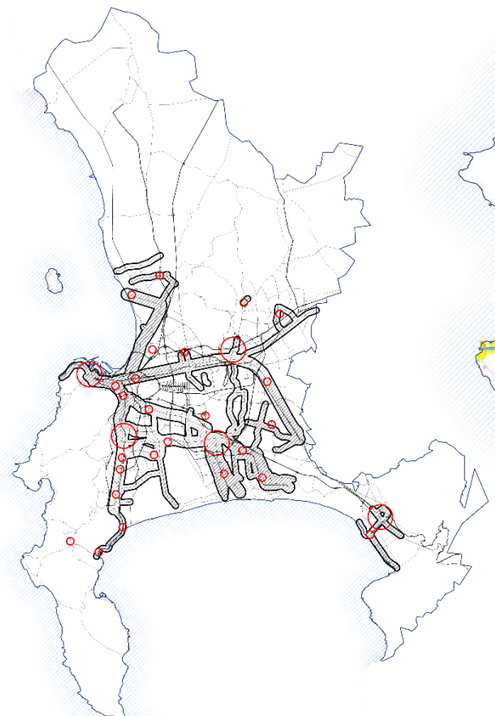
GENERAL ANALYSIS

Maps C5d-a to C5bd-d spatially depict mixed-use areas (percentage of non-residential or residential floor area >= 10% per 4ha grid cell) and land use intensity (building density) and non-residential and residential floor area).

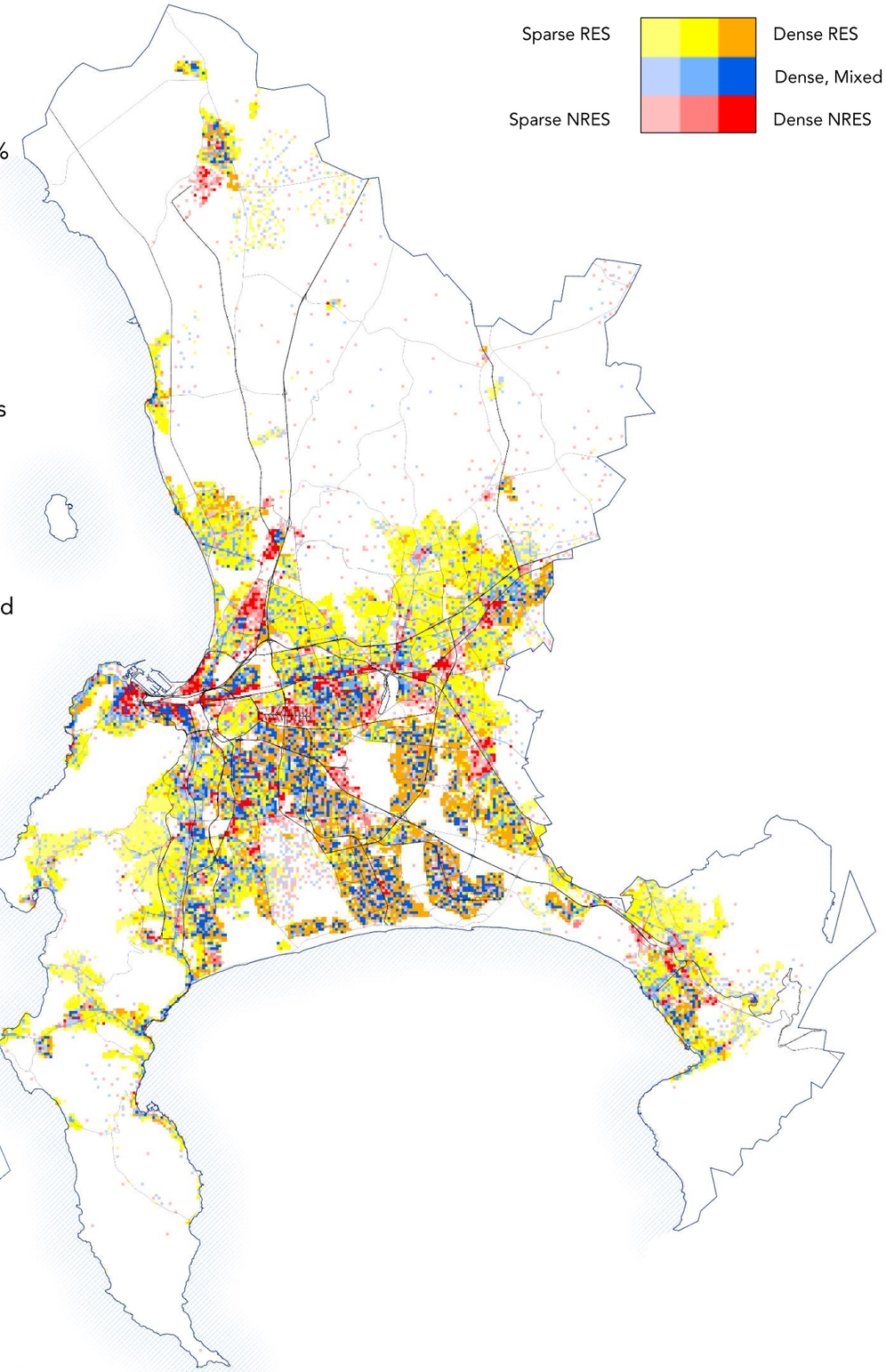
It is evident that strong spatial patterns representing spatial clustering of land use/activities and land use intensity exist.

Map C5d-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 C5d-f combines land use intensity and diversity into a bivariate depiction of its spatial distribution.



Map C5d-e: Nodes and Corridors (MSDF, 2022)



Map C5d-f: Bivariate analysis of land use diversity and intensity (2022)

C.5

DIVERSITY OF USE

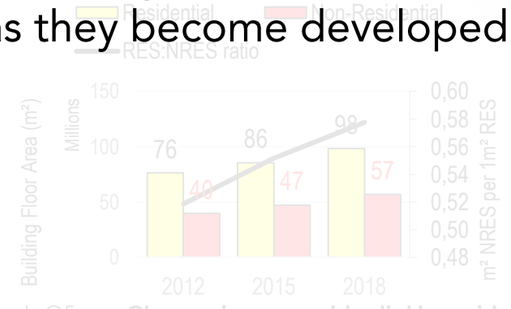
KEY TAKE-AWAY TRENDS

- 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**. There is however a continued dispersed pattern of mixed use in the Metro South East, rather than concentrated

- **More diversification occurred around development corridors and in nodes.** Development since 2012, in the CBD and surrounding inner city areas, has been predominantly residential uses, in what have historically been areas dominated by non-residential land uses.

- **Between 2012 and 2022**, there was a **steady increase in both non-residential & residential land use** in the locations of the newly-delineated (2023) Spatially Targeted Areas and a relatively diverse mix of land use maintained.

- **New Development Areas have a greater proportion of residential land use** however as these include primarily vacant land parcels, their level of diversification could improve over time as they become developed.



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

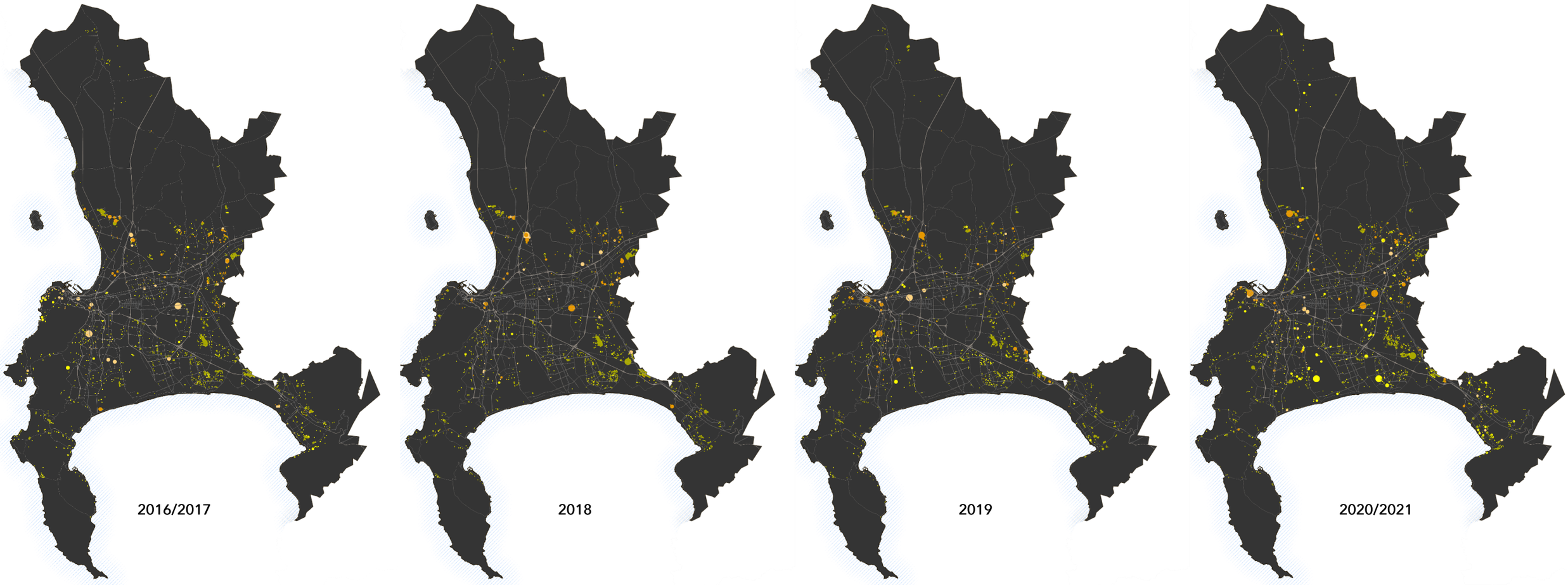
C.6a

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



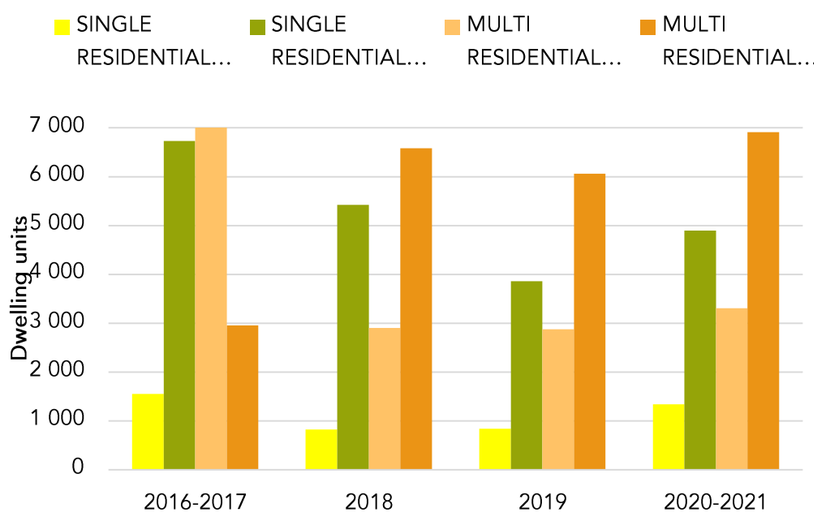
Map series C6a-a: Residential building plans submitted and building work completed per year. The size of circles indicate the relative number of residential units.

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 C8.



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

C.6a

RESIDENTIAL BUILDINGS

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 South East (MSE), Bloekombos, Blue Downs/Eerste River, Sunningdale, and residential estates such as Sitari (Helderberg). The delivery of state-assisted housing (refer to indicator F1) 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.

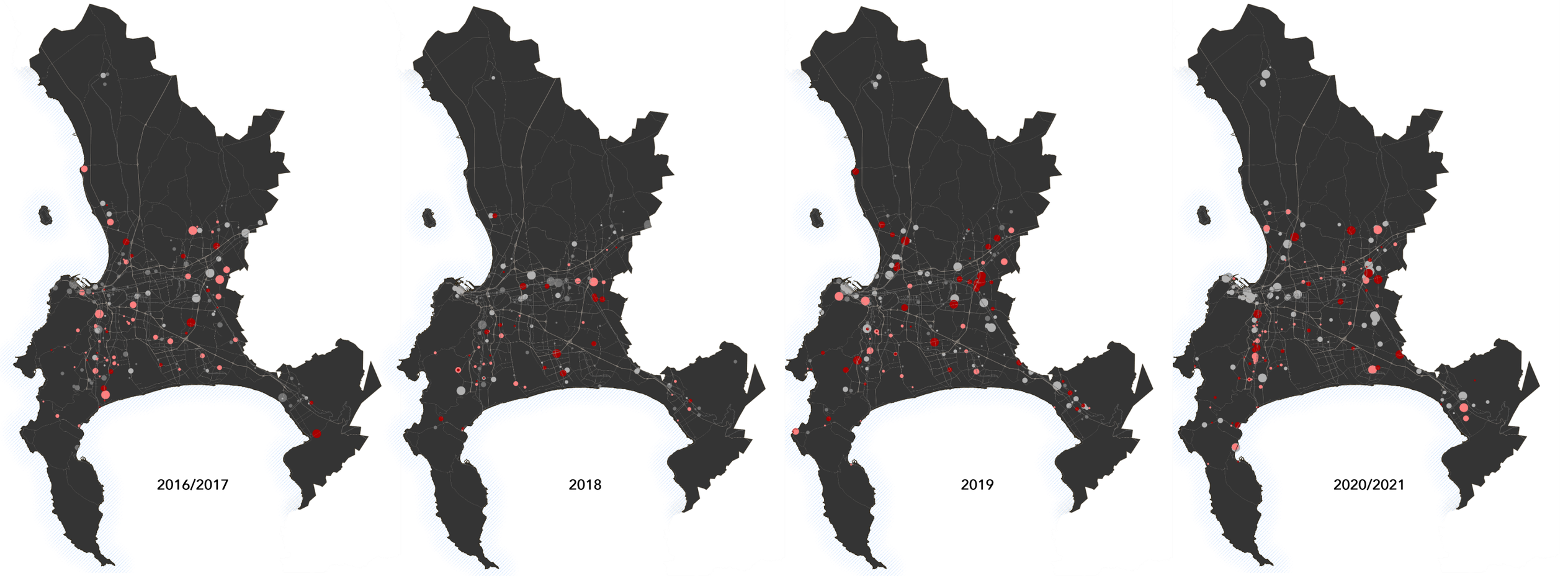
C.6b

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



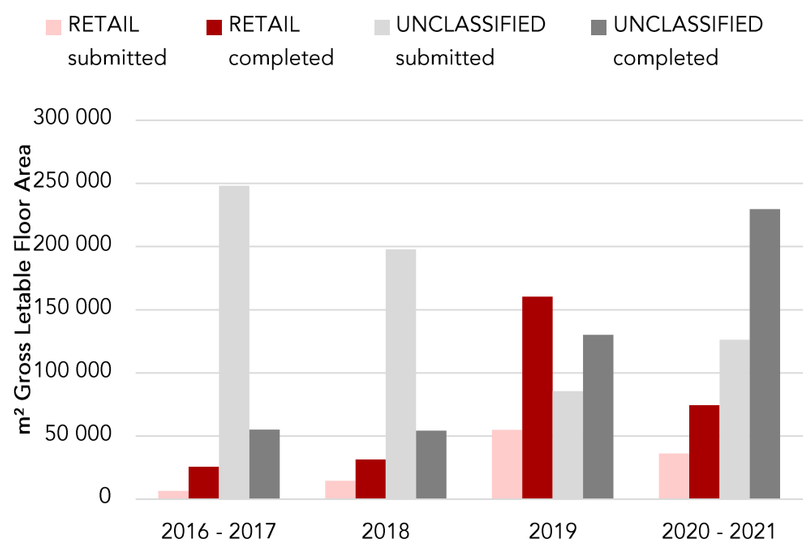
Map Series C6b-a: Building plans for retail buildings submitted and constructed. The size of circles indicate the relative floor area in square metres.

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 large 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 South East. 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 C8.



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

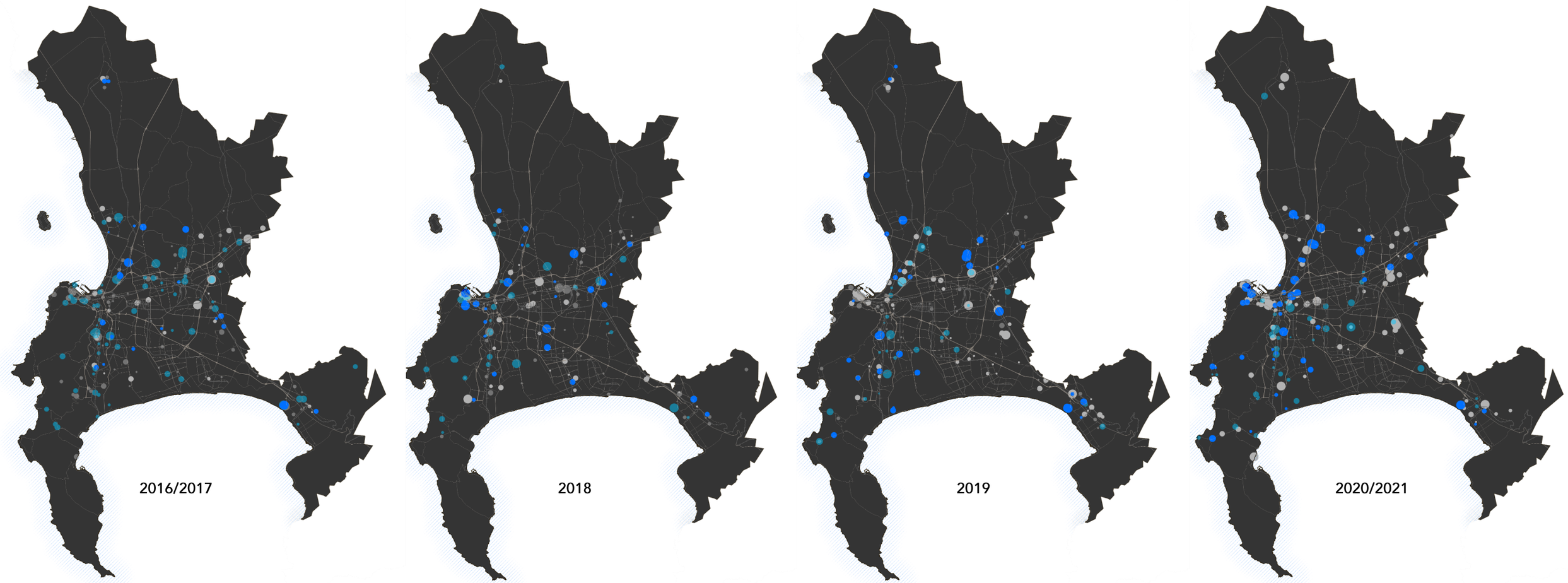
C.6c

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.

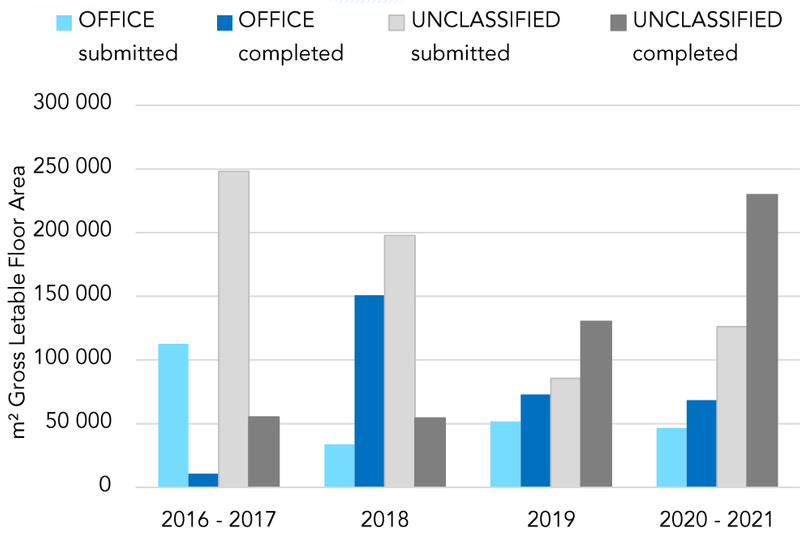
GENERAL ANALYSIS

In terms of building completions, office development is highly concentrated in areas along the Southern Corridor, the Blaauwberg/ N7 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 South East. 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 C8.



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

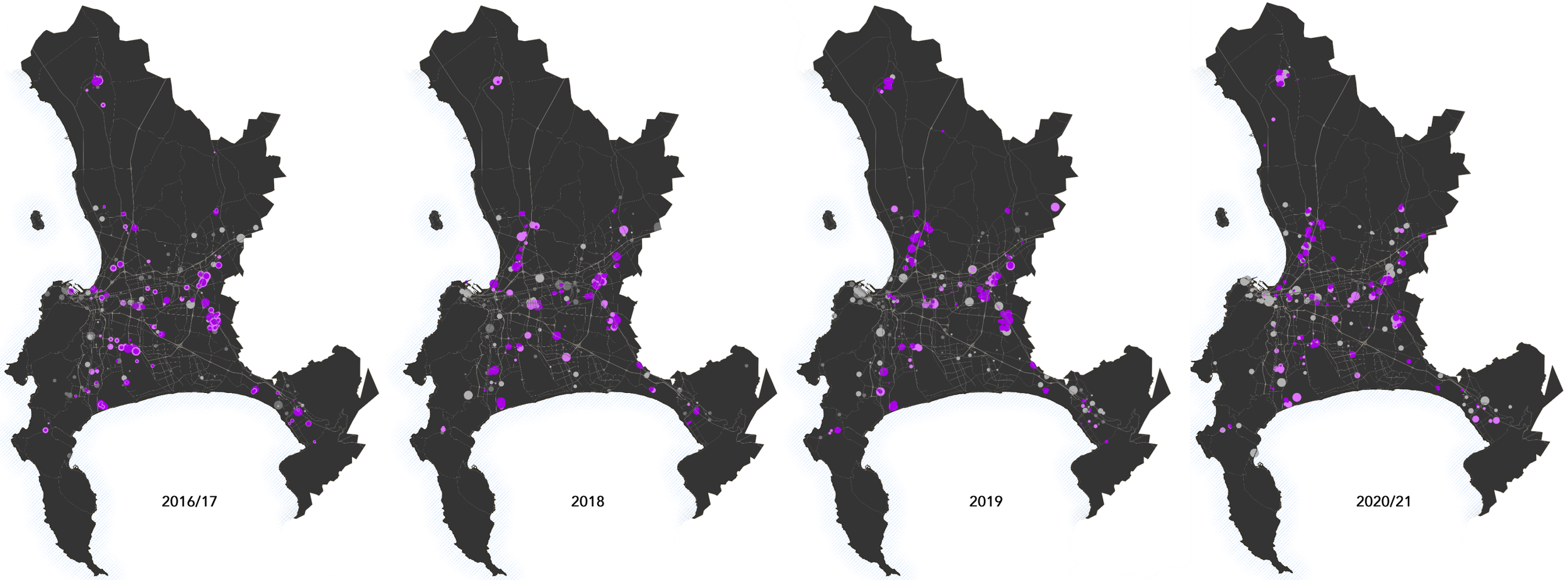
C.6d

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



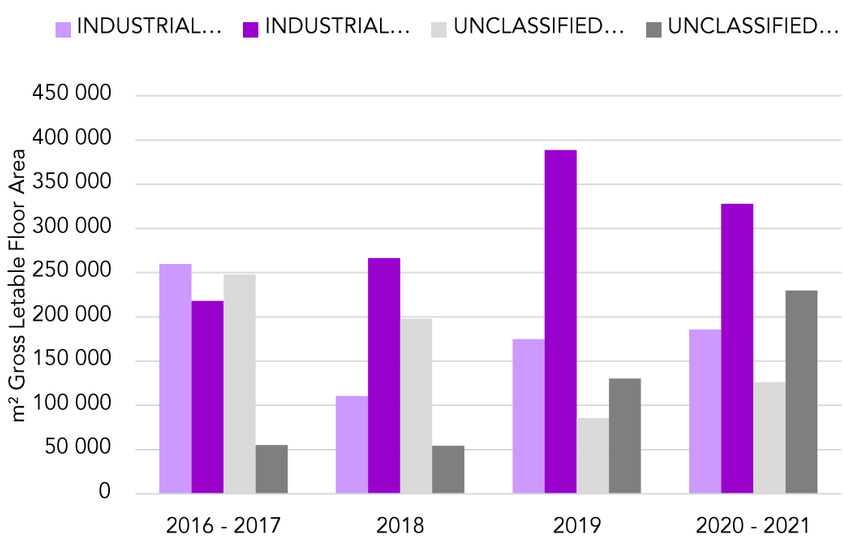
Map series C6d-a: Building plans for industrial buildings submitted and constructed. The size of circles indicate the relative floor area in square metres.

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 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 C8.



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

C.6

NON-RESIDENTIAL BUILDINGS

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/ last mile services, 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** is based on 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.



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

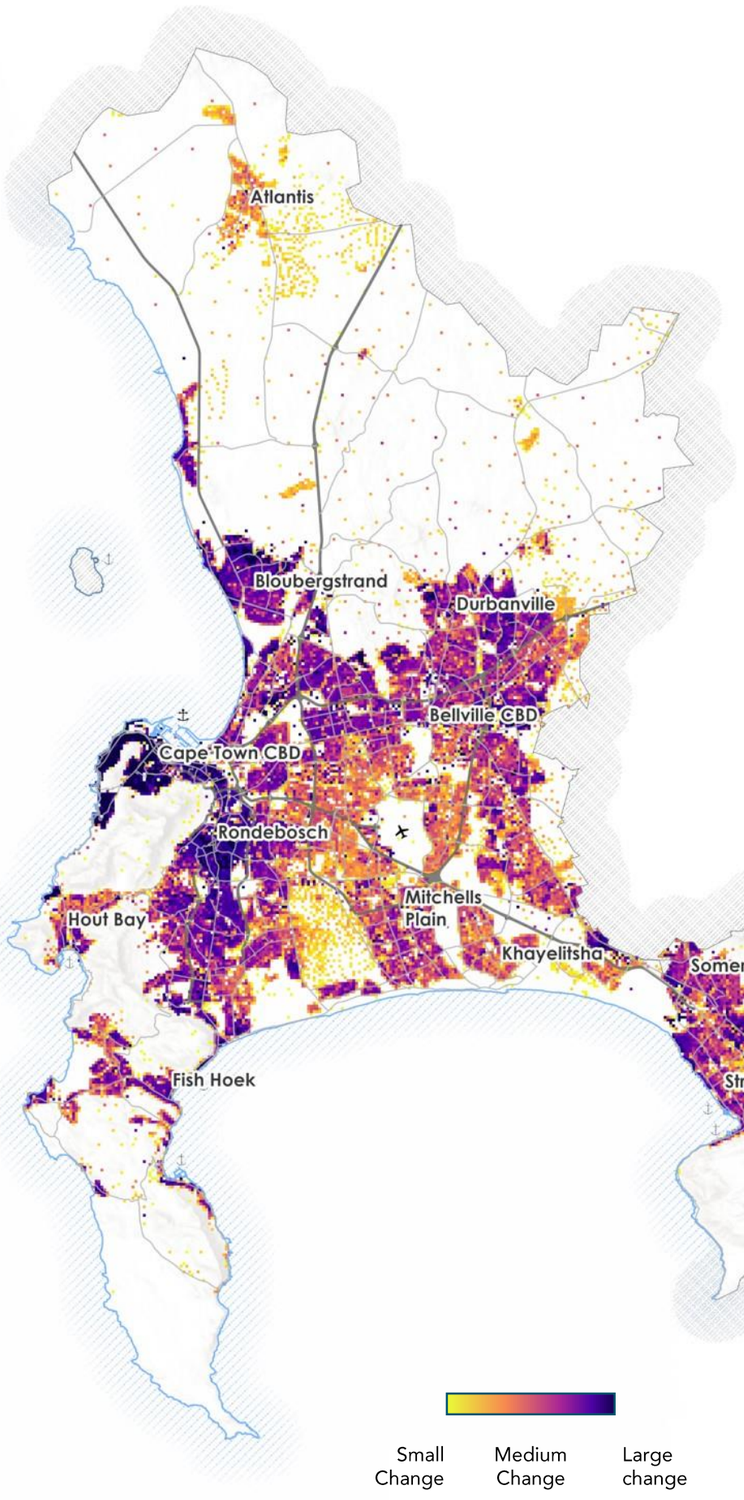
C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE

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

Source: CCT Valuation Rolls (2012, 2015, 2018, 2022)

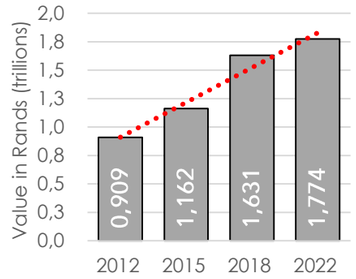


Map C7-a: Change in property value (2012 to 2022)

OVERALL TREND

The value of both residential and non-residential properties has increased between individual GV years and, as well as over the analysed period from 2012 to 2022 (see Graph C7-a). Map C7-b shows the combined value of all formal property types captured in the electronic version of the City's General Valuation Roll. Map C7-a shows change in value over a period of 10 years (2012-2022) and 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/activities/ land uses, as well as new development in certain areas which result in more properties/space, and – as a result – also higher values in those specific 4ha spatial units of analysis, as shown on Map C7-a.



Graph C7-a: Estimated total Rand Value of all properties on the City's General Valuation Roll (may differ slightly from the Valuations department's official values at date of valuation).

GENERAL ANALYSIS

Both internal/endogenous and external/exogenous hedonic pricing factors play a role when determining the value of property. Internal factors are those based on the characteristics of the property (land and buildings) itself, e.g. size, appearance, finishes, etc.). External factors are those based on the characteristics of the surrounding environment, e.g. crime rate in the suburb, proximity to facilities / other locations (with both positive and negative implications) and desirable locations (e.g. the coast and the mountain), value of other properties in the area, etc. New development areas will by default have higher values than before.

This metropolitan scale of analysis does not reveal details about the change in value of different land use types and market segments or the price growth in different areas of the city. Some general observations can however be made, and should be read together with other indicators presented herein.

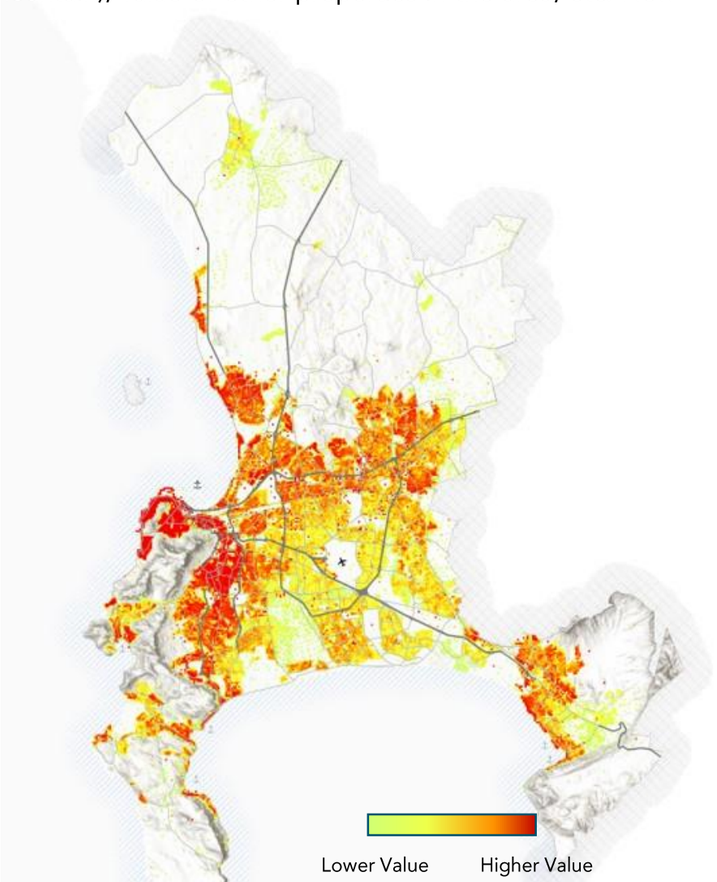
SPATIAL TREND (DISTRIBUTION/PATTERN)

Property value increased the most in the following areas:

- City bowl/CBD and surrounds
- Camps Bay and Llandudno
- Century City
- Sunningdale (new developments)
- Claremont, Kenilworth and Wynberg
- Strand and Somerset West CBD and surrounds
- Brackenfell
- Estates, e.g. Burgundy, Buh-rein, Sitari, Baronetcy, Pinehurst

Properties values increased the least in the following areas:

- Delft, Belhar and Wesbank
- Philippi
- Joostenbergvlakte Smallholdings
- Wallacedene
- Sandvlei
- Firlands and surrounds



Map C7-b: Property value, 2022

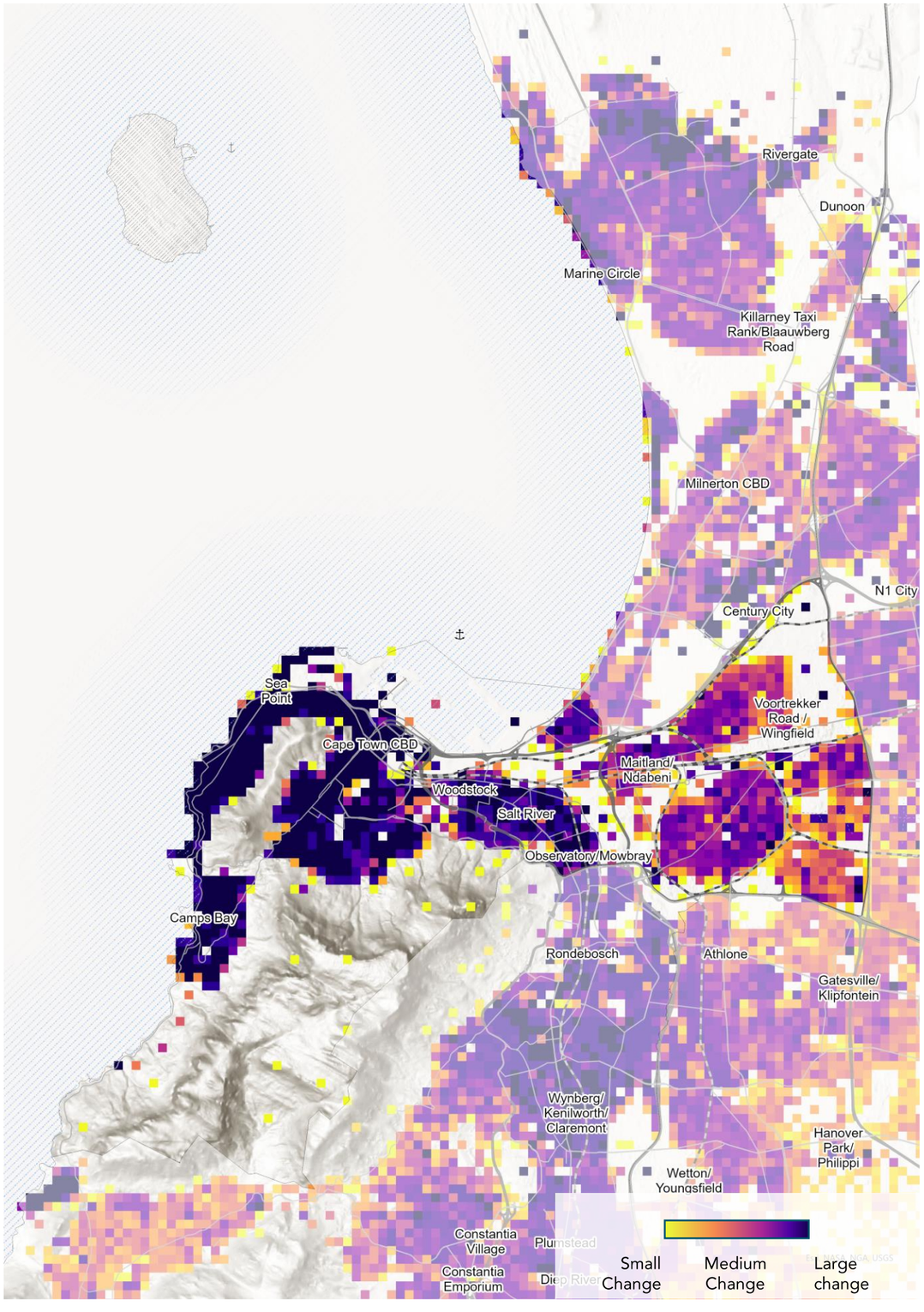
C.7

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, 2022). Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a: Table Bay: Change in property value (2012 to 2022).

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 and Salt River (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) (see indicator G1a).

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 and more development is on the way.

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

Values are decreasing of properties which are located to the outskirts of traditional neighbourhoods or areas closer to industrial areas.

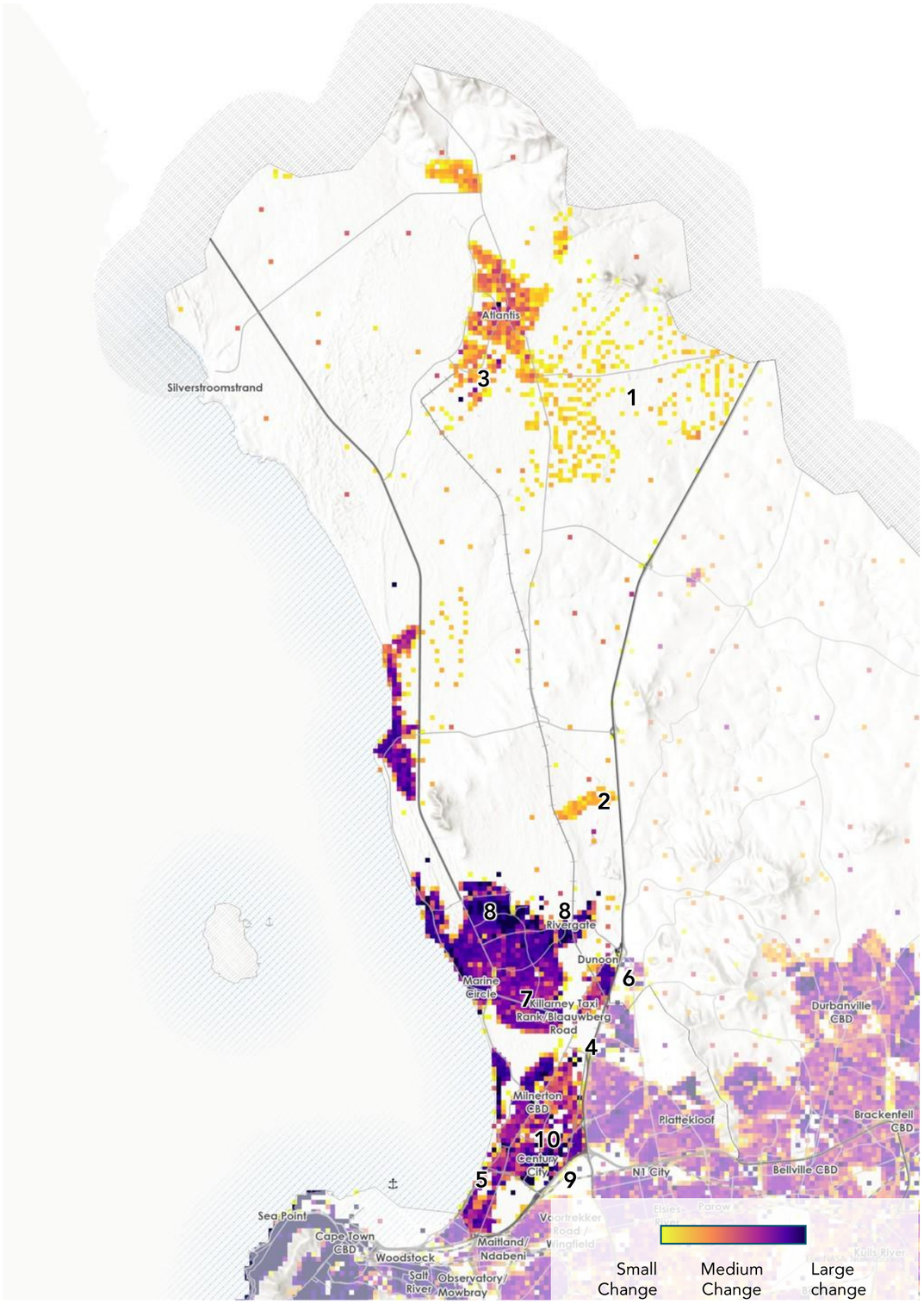
C.7

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, 2022). Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a: Blaauwberg: Change in property value (2012 to 2022)

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

LOCAL LEVEL TRENDS

1. Smallholding areas of Klein Dassenberg and Morningstar (2) have seen a small increase in values.
2. Morningstar
3. Atlantis Industrial area has seen small to medium increases in property values, all industrial; this may be due to Atlantis Special Economic Zone declaration and interventions making the industrial area more attractive.
4. Industrial areas / corridor (Montague Gardens and Killarney Gardens) has seen medium level changes in property values over the past decade.
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 such as Sunnydale and Sandown, have seen large increases starting from a low base, given the area was undeveloped in 2012.
9. Strong growth in Century City continued, driven by mixed land uses of office, retail and residential.
10. Strong growth was evident in Sanddrift, adjacent to Century City. Residential areas close to Century City appears to have benefitted from proximity.

ALIGNMENT TO SPATIAL POLICY

Change in property values is strongly linked to locational factors, sea and mountain views and the fact that it is new urban developments with orderly designed neighbourhoods.

Du Noon experienced large property value changes, likely from a low base but also due to mass informal redevelopment happening (small scale rental blocks of flats) which continue to rapidly replace the single house per erf. Valuations Department has invested significant effort to re-valuate Du Noon and other Less Formal Establishment Act-neighbourhoods and hence the values were large especially compared in 2022 with the 2012 figures.

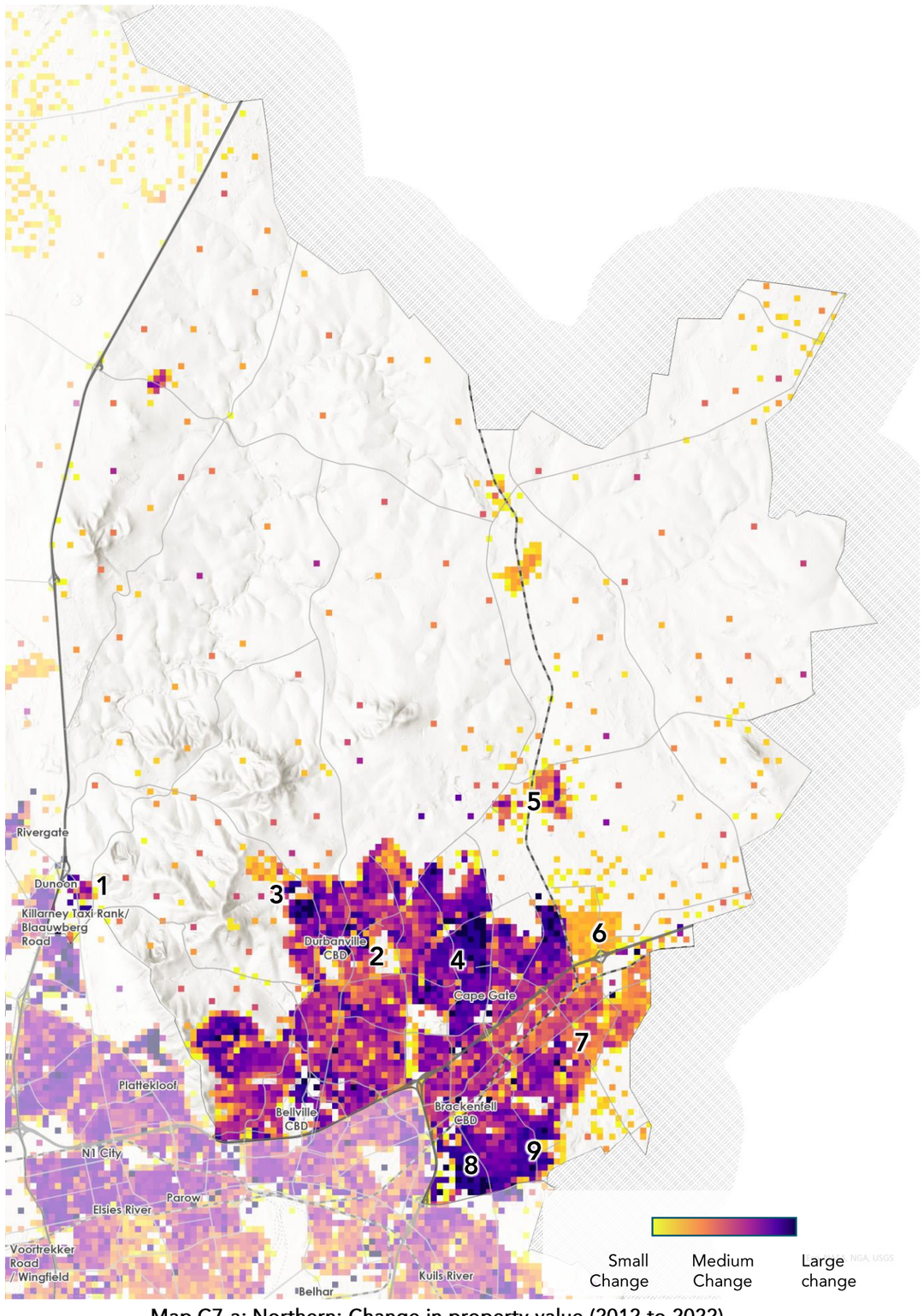
C.7

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, 2022). Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a: Northern: Change in property value (2012 to 2022)

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 as part of Atlantic Hills.
2. Durbanville secondary CBD - Increase in values can be a result of redevelopment to higher-density residential and commercial uses as promoted in the 2023 District Plan.
3. Clara-Anna Fontein Lifestylesecurity estate - Land use approvals has been obtained prior to 2012 when this land was still agriculturally zone. Implementation of this new development for low density but high income residential, including a private school, has lead to large value changes.
4. Pinehurst, Kraaifontein - Implementation of medium-density open-market residential land uses (with private schools) in security estate/ town house complexes on vacant (in accordance with phasing plan: Garden Cities), lead t large property valuation increases since construction started about a decade ago.
5. Fisantekraal, Greenville - Implementation of subsidised human settlement development by Garden Cities has seen some valuation increases but small compared to higher incomer residential security estates (refer 3 and 4 above).
6. Joostenbergvlakte smallholdings – Small 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.
8. Brackengate 2 Industrial Area - Implementation of large scale distribution centres lead to significant and large property value changes between 2012 and 2022, equal in intensity to the CBD of CT. Previously vacant agricultural land.
9. Brackenfell Security Estates - Infill development & redevelopment (mostly GR1) of former smallholdings along Kruis Road has lead to large property value increases from previously vacant land value.

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 through top structures in subsidised human settlement projects. However, the increase in land use diversity and intensification in the Durbanville CBD may be linked to approved spatial planning policy as it is identified as an urban node where mixed use is promoted as described in the District Plan.

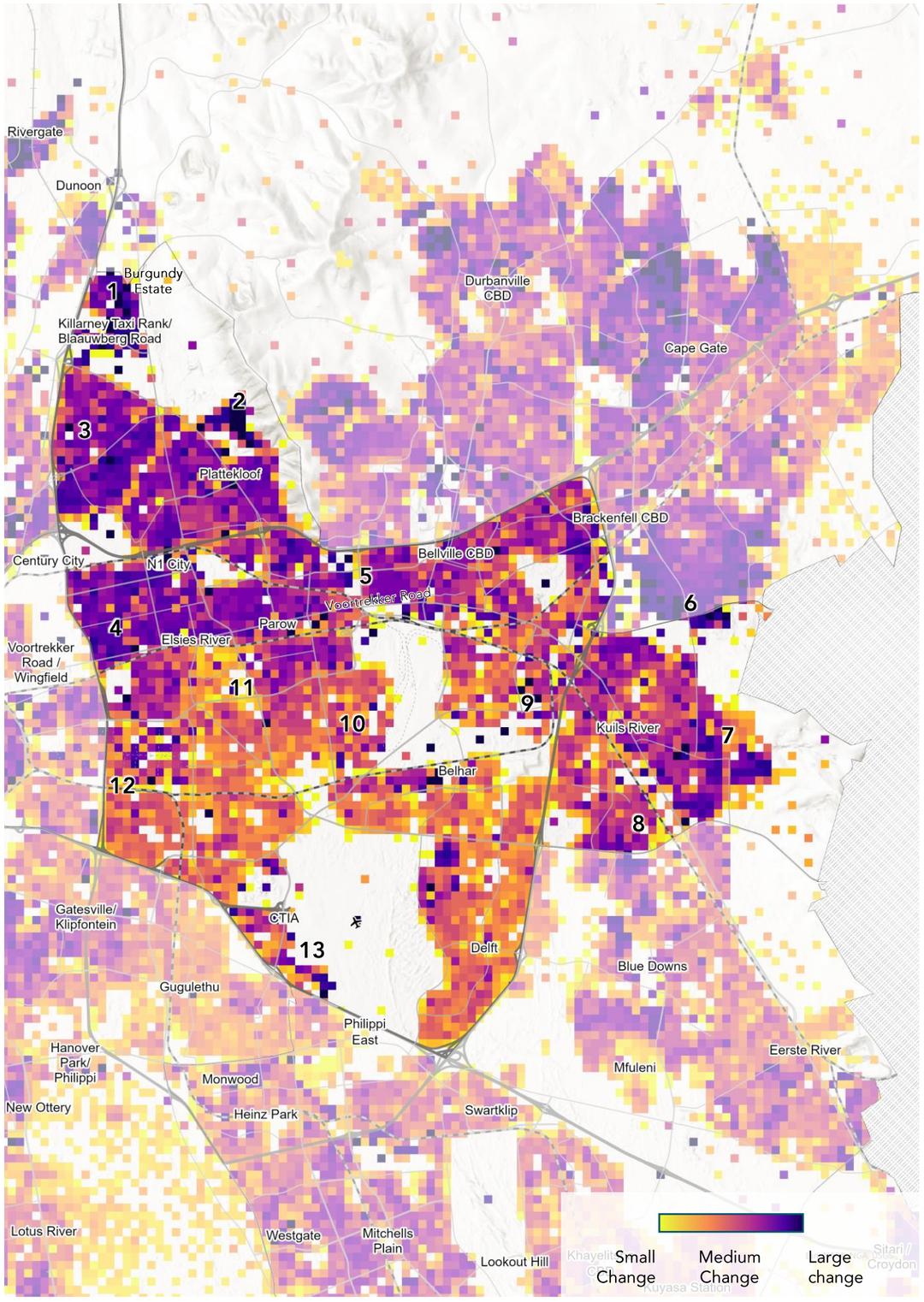
C.7

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, 2022). Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a: Tygerberg: Change in property value (2012 to 2022).

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)

ALIGNMENT TO SPATIAL POLICY

The change in property values between 2012 and 2012 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 – mostly in security complex typologies. Furthermore, it is noted that the highest change in property values occurred in the employment opportunities areas designated for industrial use and more so neighbourhoods to the north of the N1 or Voortrekker Road.

LOCAL LEVEL TRENDS

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

1. Burgundy Estate (security medium to high density residential development on previously un-developerd land) - substantial increase in property value resulting from various portions of the, mostly general residential development, being implemented.
2. Baronetcy Estate as well as the De Plattekloof Lifestyle retirement village - substantial increase in property value resulting from implementation of open market (SR1), but in close proximity to key hospitals and high income neighbourhoods.
3. Increases in valuation could be a result of upgrades of these properties considering that the MyCiti bus service was rolled out here. These are established well-located single residential suburbs with good schools.
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. Hazendal Gables - Implementation of higher-density residential and commercial development along Bottelary and Saxdowne Roads (mostly new security complexes for flats and town houses including medium size neighbourhood shopping centre), from vacant land a decade ago.
7. Zevenwacht security estates areas - 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 well-located, well-serviced industrial areas mostly benefitting from Special Ratings Area institutional and incentive schemes where crime and grime get addressed with additional services.

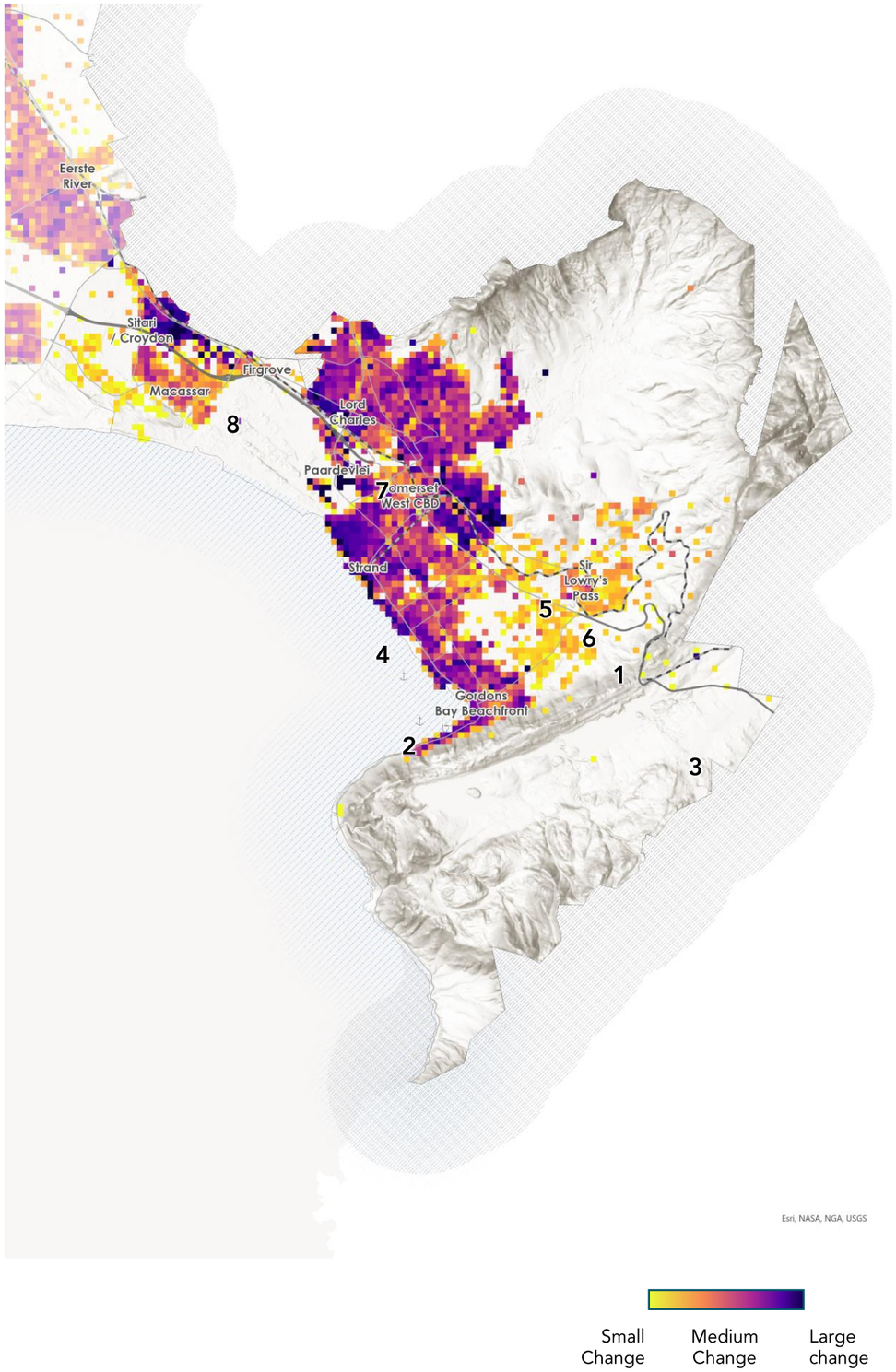
C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

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Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a: Helderberg: Change in property value (2012 to 2022).

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 lifestyle and security 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. Mostly the increase is largest considering the vacant land use in 2012 compared to the 2022 improvements.

1. Sir Lowry's Pass Road - Increase in values in view of N2 realignment. Furthermore, along Sir Lowry's Pass Road from the existing N2 to Gordon's Bay town has seen an increase in land value due to locality and change of uses from residential to schools or academies, etc. and due to the upgrading of the road.
2. Strand CBD - Increase in values to due to views and amenities and locality as well as redevelopment and renovations 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 plans for 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 a private hospital development (Busamed).
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 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 which were vacant or agriculture a decade ago.
7. Along the N2, between Somerset West local node and the Firgrove local node - Increase due to residential complex development.
8. Croydon, Sitari and Kelderhof Luxury Security Estates - 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 approved spatial policy. Increase in valuation mainly occurred due to new developments on previously vacant/ agriculture or under-utilised land, redevelopments, infill developments (phasing in development areas) or formalisation (top structures) in lower-income areas guided by approved spatial planning policy.

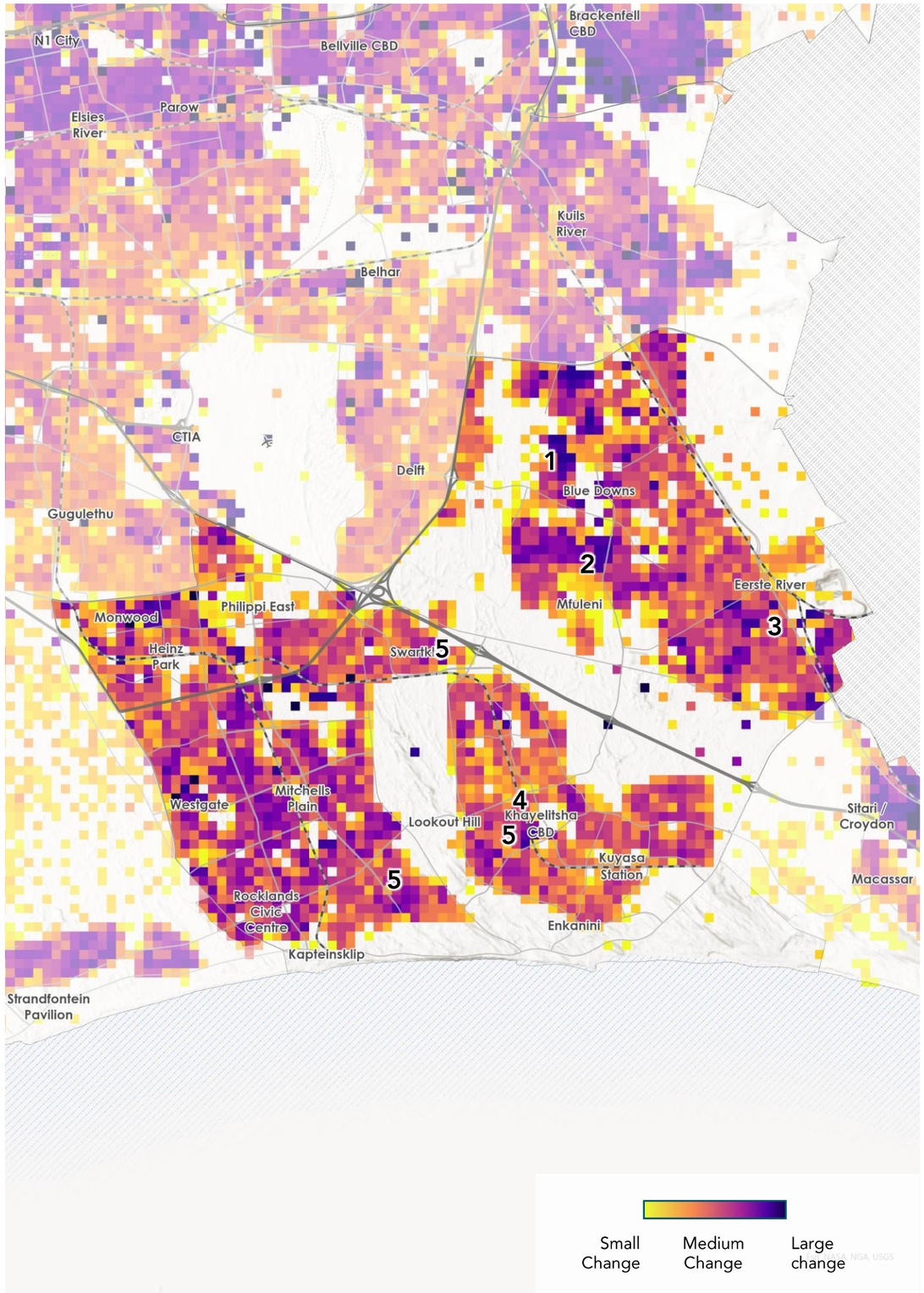
C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

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Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a KMPGBD: Change in property value (2012 to 2022).

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 on previously vacant or under-utilised land.
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. Khayalitsha – commercial activity located along Spine Road and Phakamani Road has created a demand for 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.
5. Generally, residential properties mostly those that were state funded, have seen a slight increase in value due to the high demand for the development of rental flats well known as Small Scale Rental Units. This demand has seen a number of government subsidy areas experience visible increases in property value. Also areas that are bonded such as Ilitha Park, Mandalay, Kwezi Park, which have relatively large erf sizes, have also seen a substantial growth in property value due to location, character of the area, surrounding conditions and amenities.

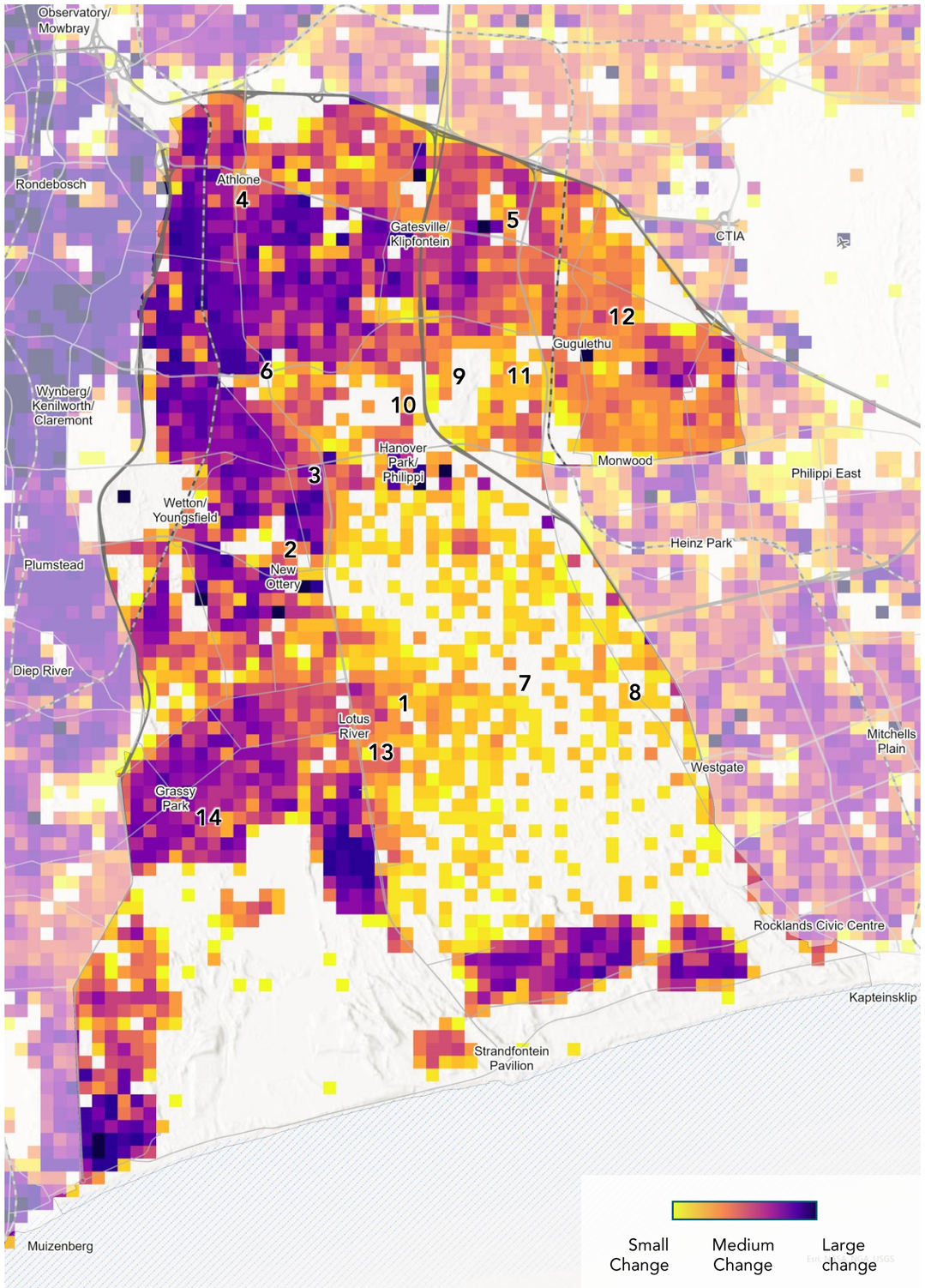
C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

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Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a: Cape Flats: Change in property value (2012 to 2022)

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)

LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

The change in property values between 2012 and 2022 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 and [6] Pinnati-Bellthorne).

There has been a significant change in property value in areas outside of spatial planning designations such as the [7] 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). Additionally, in the Primrose Park and Sand Industria area [9], there has been uptake of vacant land by businesses/industry which explains the increase in property value in that area.

Areas with the lowest valuation changes in the district include [10] Hanover Park, [11] Manenberg, [12] Nyanga/Gugulethu, southern part of [13] Lotus River and the eastern part of [14] Grassy Park.

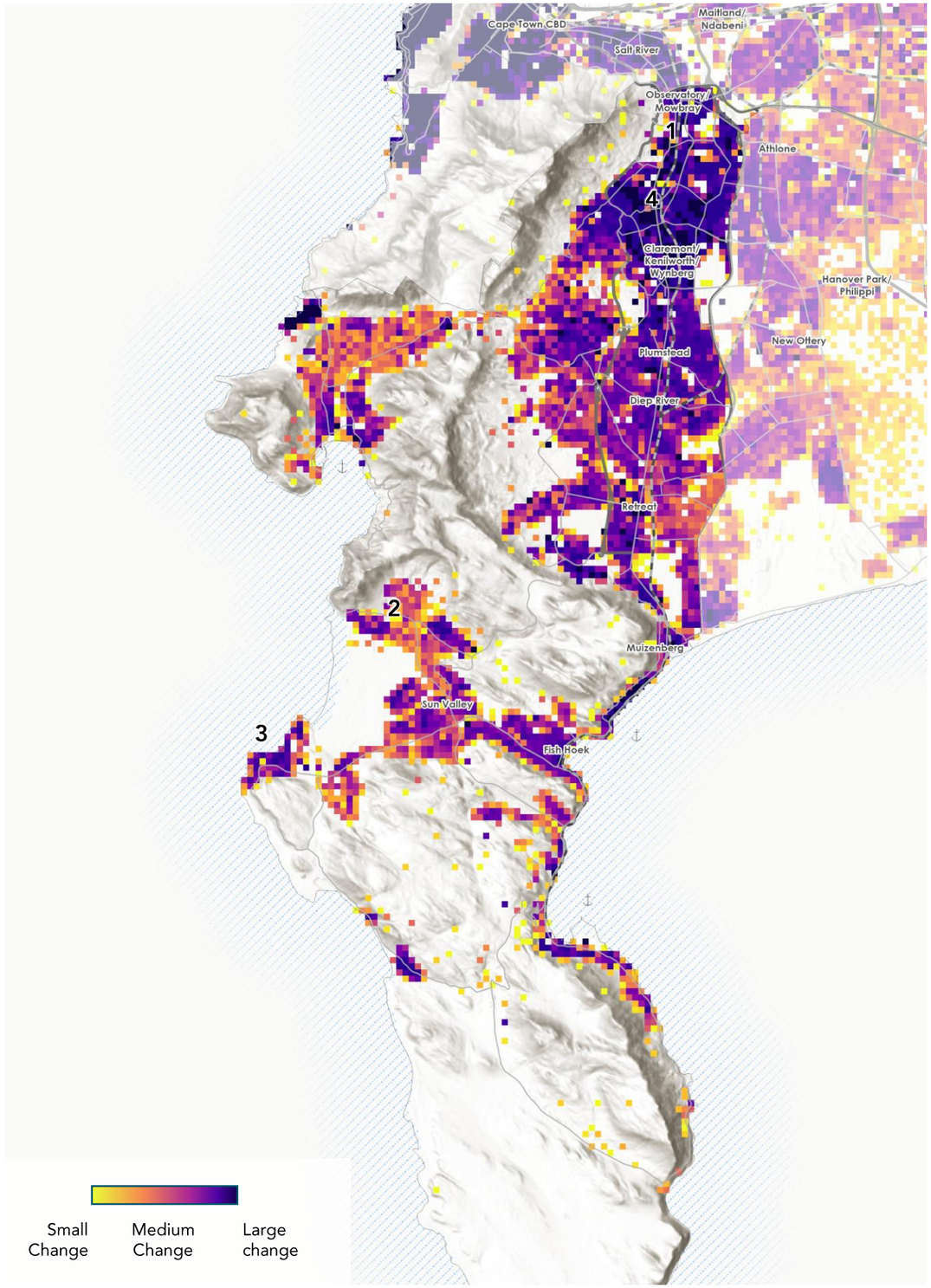
C.7

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, 2022). Data is aggregated by using a square grid comprised of 4ha (200mx200m) grid cells.

Source: CCT Valuation Rolls (2012, 2015, 2018 and 2022)



Map C7-a: Southern: Change in property value (2012 to 2022)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

More recent change in valuation has generally (and perhaps contrary to what might be expected) been most apparent in more well-located areas of the district, which is close to or within urban nodes or public transport routes and associated development corridors.

Across the district there are fairly distinct areas of change in property value over the recent period. One is the (closer) 'UCT sphere of influence' area ([1] Rosebank to Claremont) associated with new flats development. 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.

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. 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.

And thirdly, it is also apparent that the attractiveness of low-income urban areas within the district is growing, resulting in increasing population ingress pressure into these areas and consequent increasing land values and the initiation of redevelopment intensification. This includes in areas with already very high backyard shack numbers and also informal settlement parts such as in Imizamo Yethu, Hangberg, Westlake, Masiphumelele and Ocean View, where even greater backyard dwelling intensification has occurred, but now also the development of SSRUs. This also includes more formal areas such as Grassy Park, Retreat and Steenberg, where backyard intensification has also occurred through shacks but also wendy-houses and conversion of garages and additional rooms.

C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE

- There is a wide range of increased values across the city based on new building completions since the last valuation roll. The largest increase in property value between 2012-2022 was generally concentrated along the Southern Corridor, Atlantic Seaboard and New Development Areas in Sunningdale, Kraaifontein and Somerset West.

- The following suburbs **exhibited the highest increase in property value (>100 %)** between the three valuation terms (2012-2022):
  - City bowl/CBD and surrounds
  - Camps Bay and Llandudno
  - Century City
  - Sunningdale (new developments)
  - Claremont, Kenilworth and Wynberg
  - Strand and Somerset West CBD and surrounds
  - Brackenfell
  - Lifestyle Security Estates, e.g. Burgundy, Buh-rein, Sitari, Baronetcy, Garden Cities/ Pinehurst



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

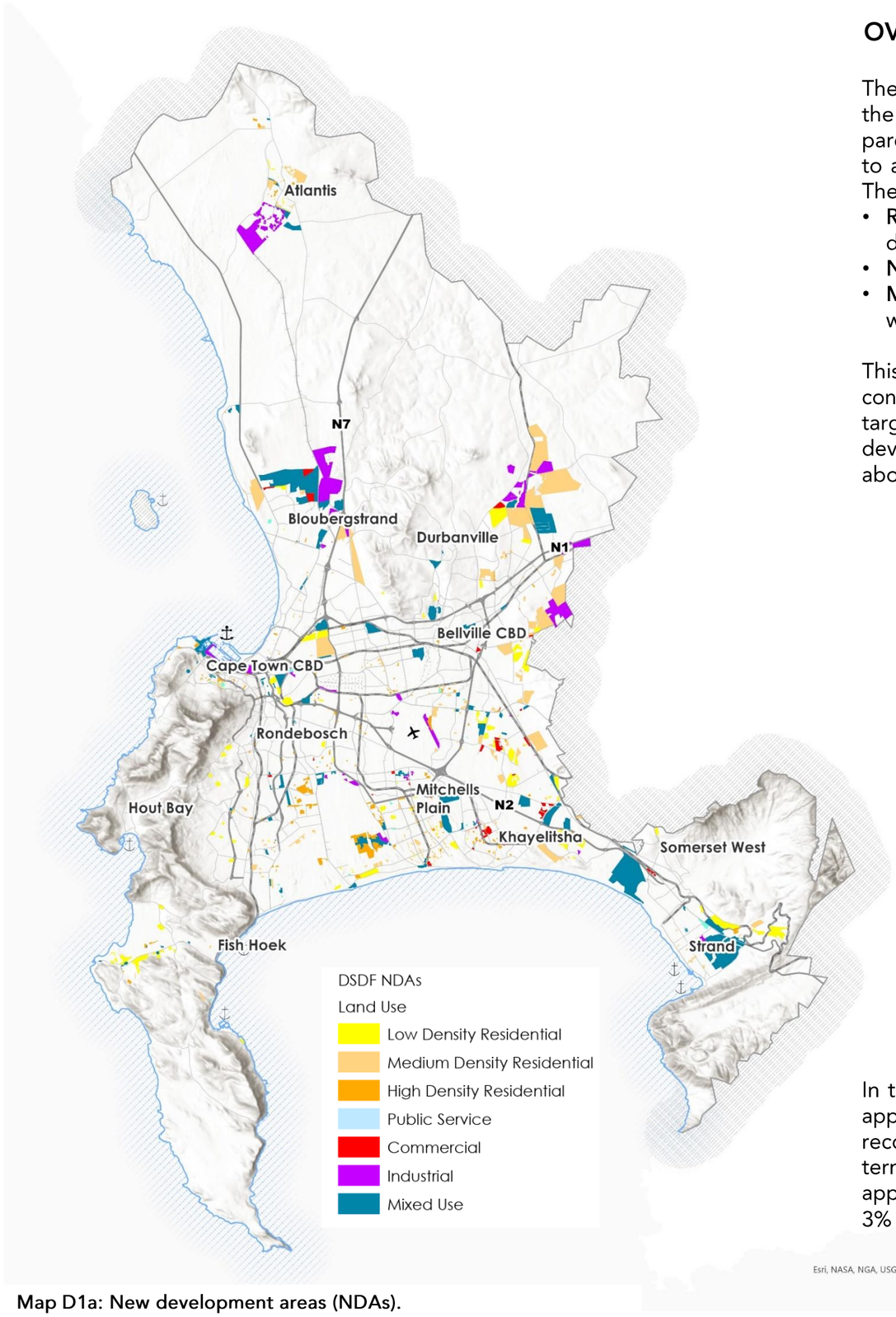
D.1a

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.

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)

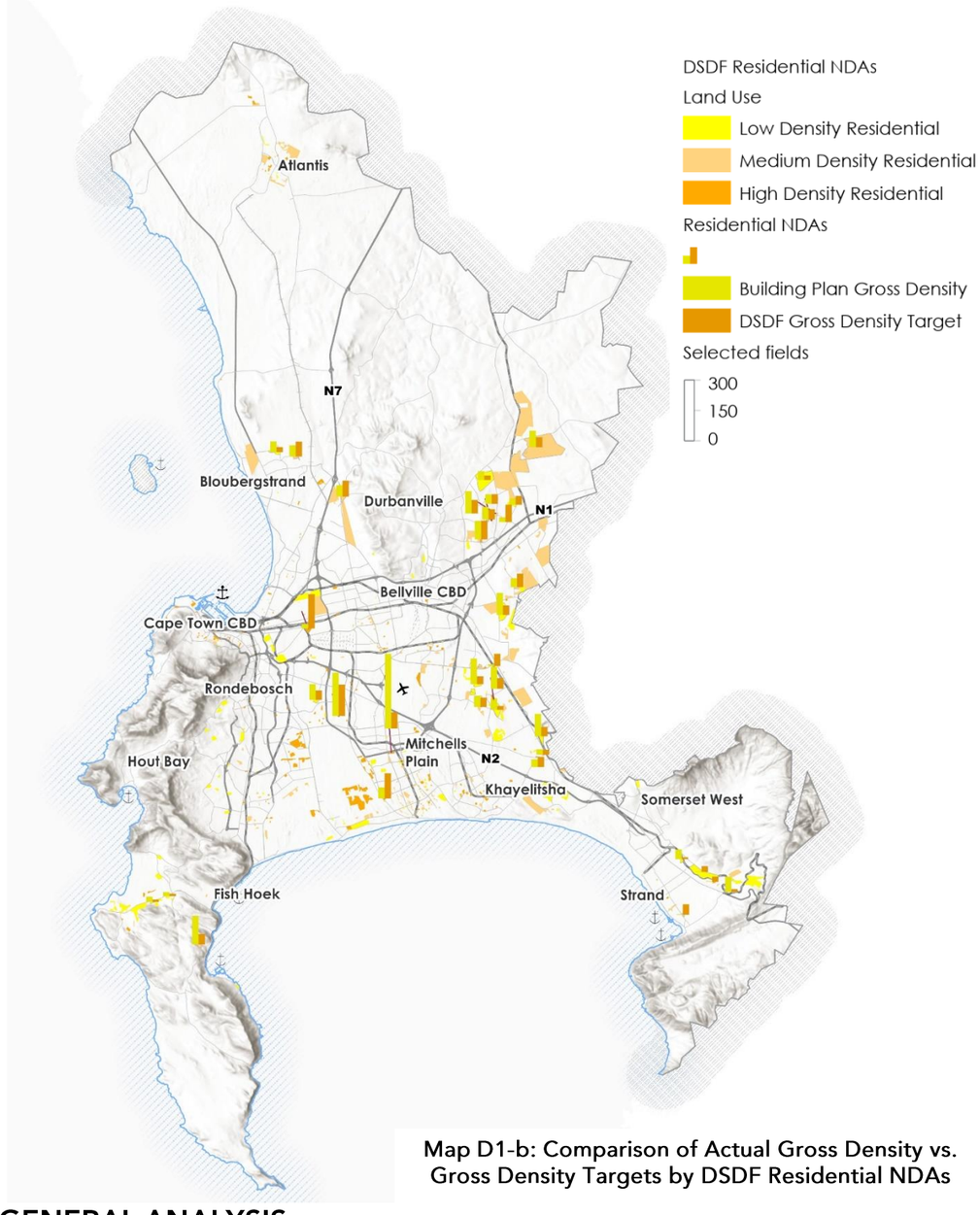
D.1b

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.

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

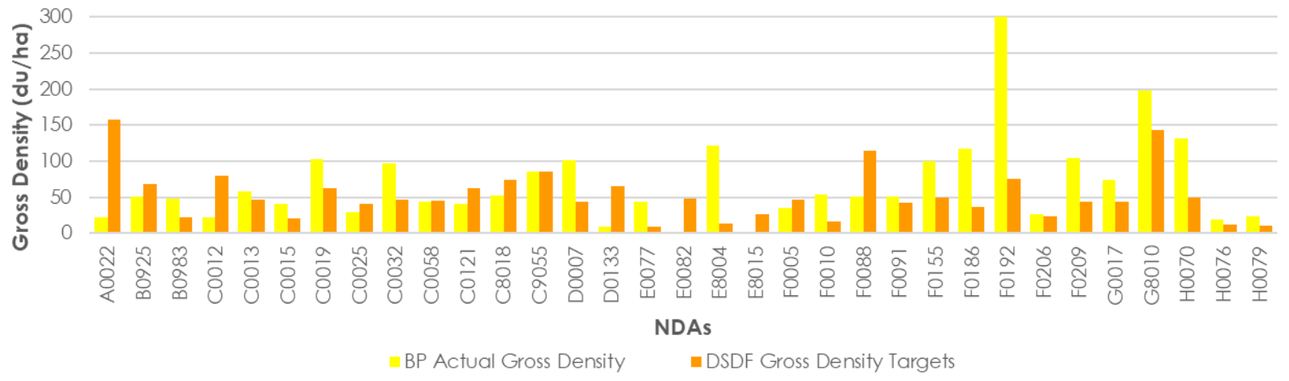
Graph D1b-b shows the composite gross density of BP in construction/completions per district and the entire metro between January 2020 and February 2023. New residential development in the Cape Flats and KPMBD districts exhibits the highest gross density of >100 du/ha due to the large number of state-assisted 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

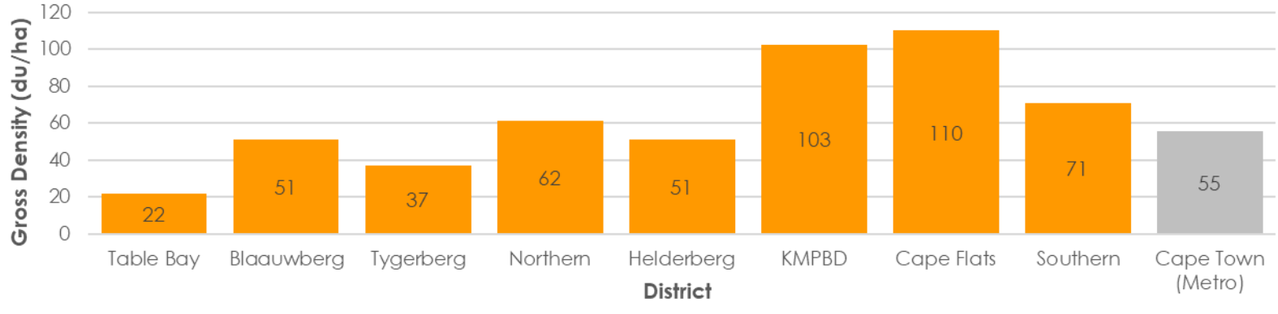
This section focuses on the portion of residential NDAs that have been taken up in terms of building plan approvals recorded as being in construction or completed in the period between January 2020 and February 2023, which amounts to approximately 6% of the total residential NDAs. However, this translates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

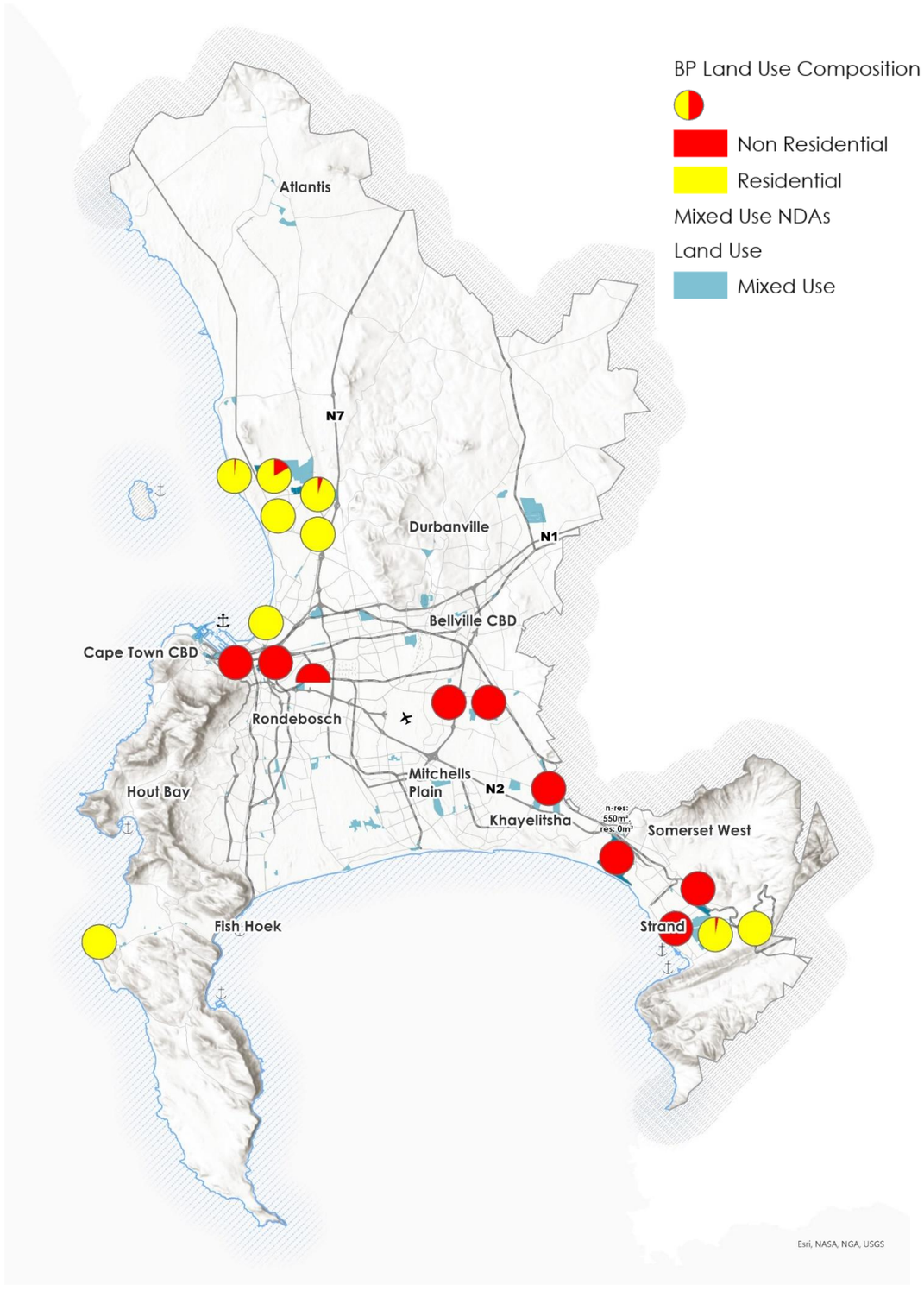
D.1c

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.

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



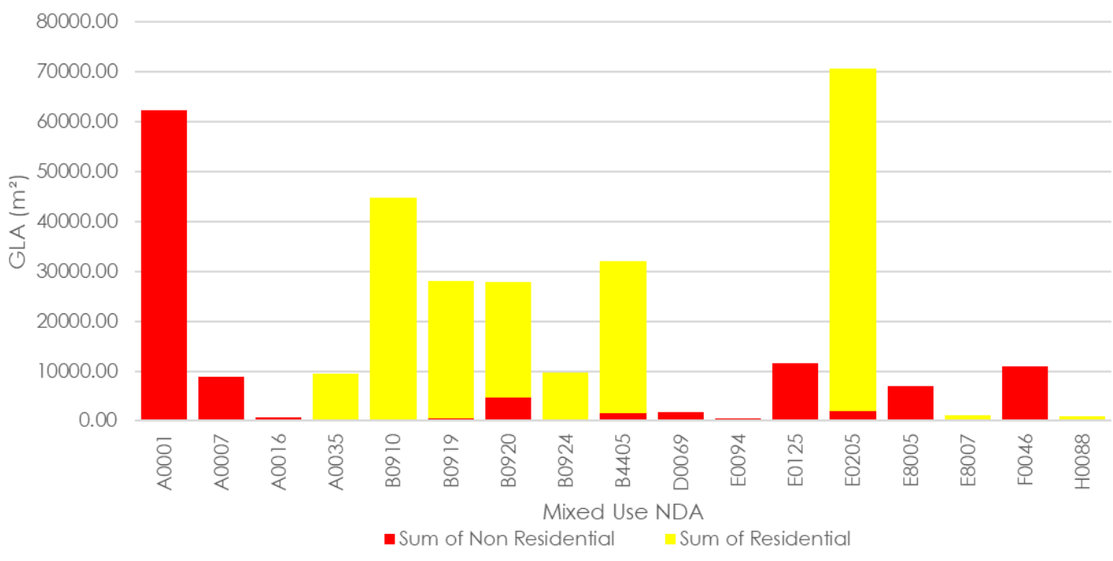
Map D1c: Composition of residential and non-residential bps in relation to mixed use NDAs

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

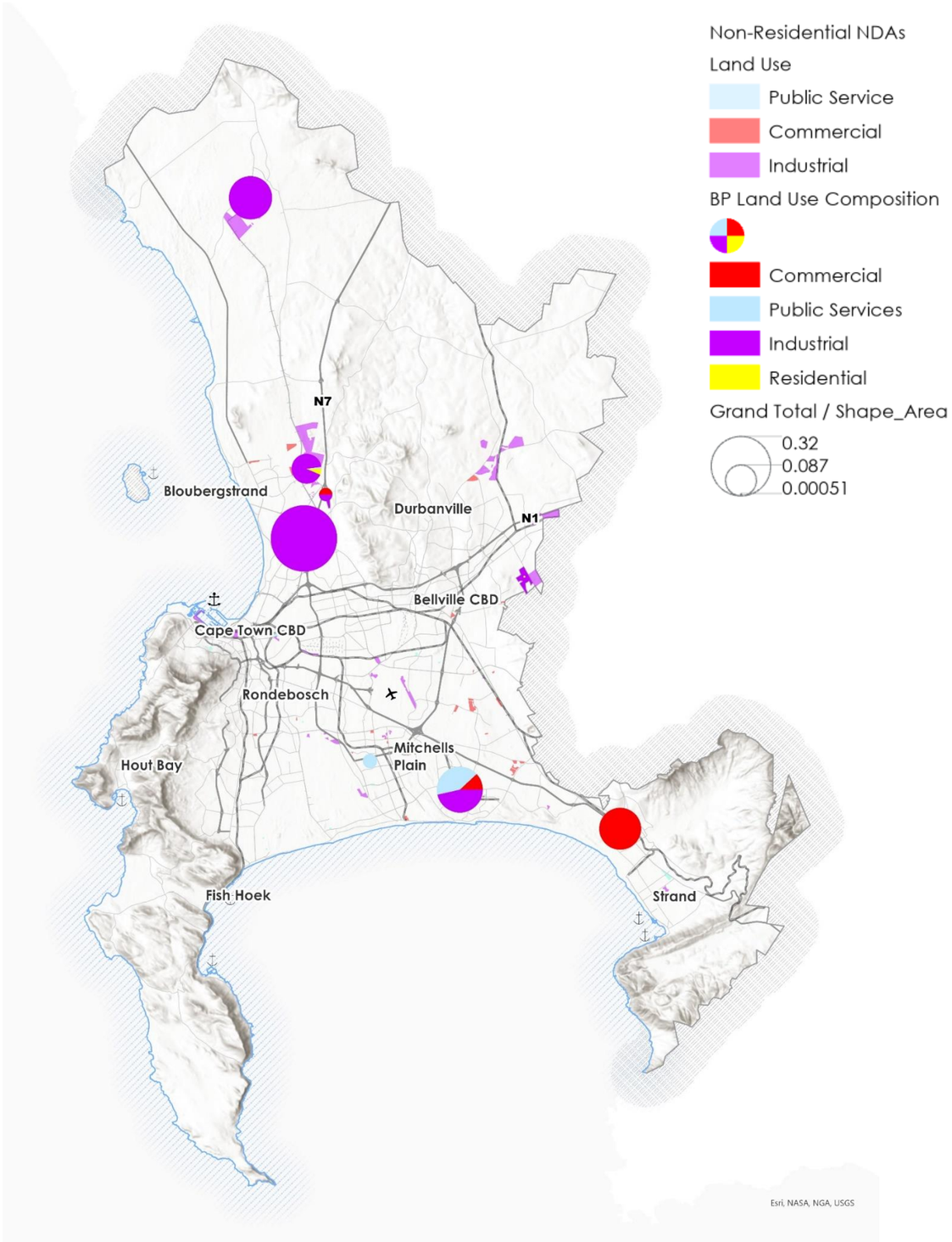
D.1d

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

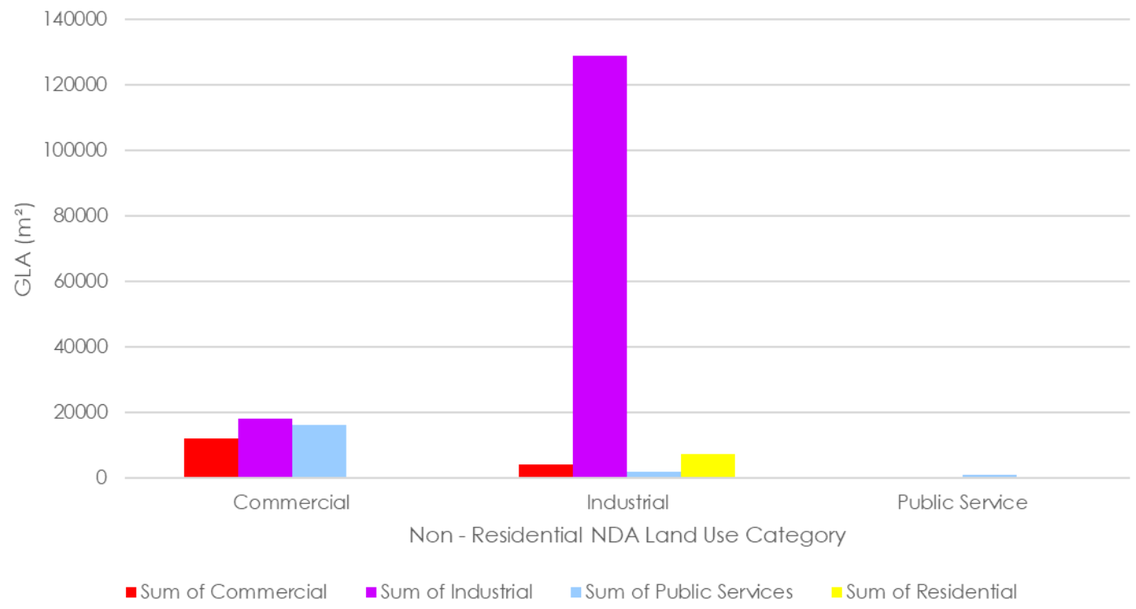
This section focuses on the portion of NDAs targeted for non-residential development (i.e. either commercial, industrial or public services) that have been taken up through building plan approvals recorded as being in construction or completed in the period between January 2020 and February 2023 related 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

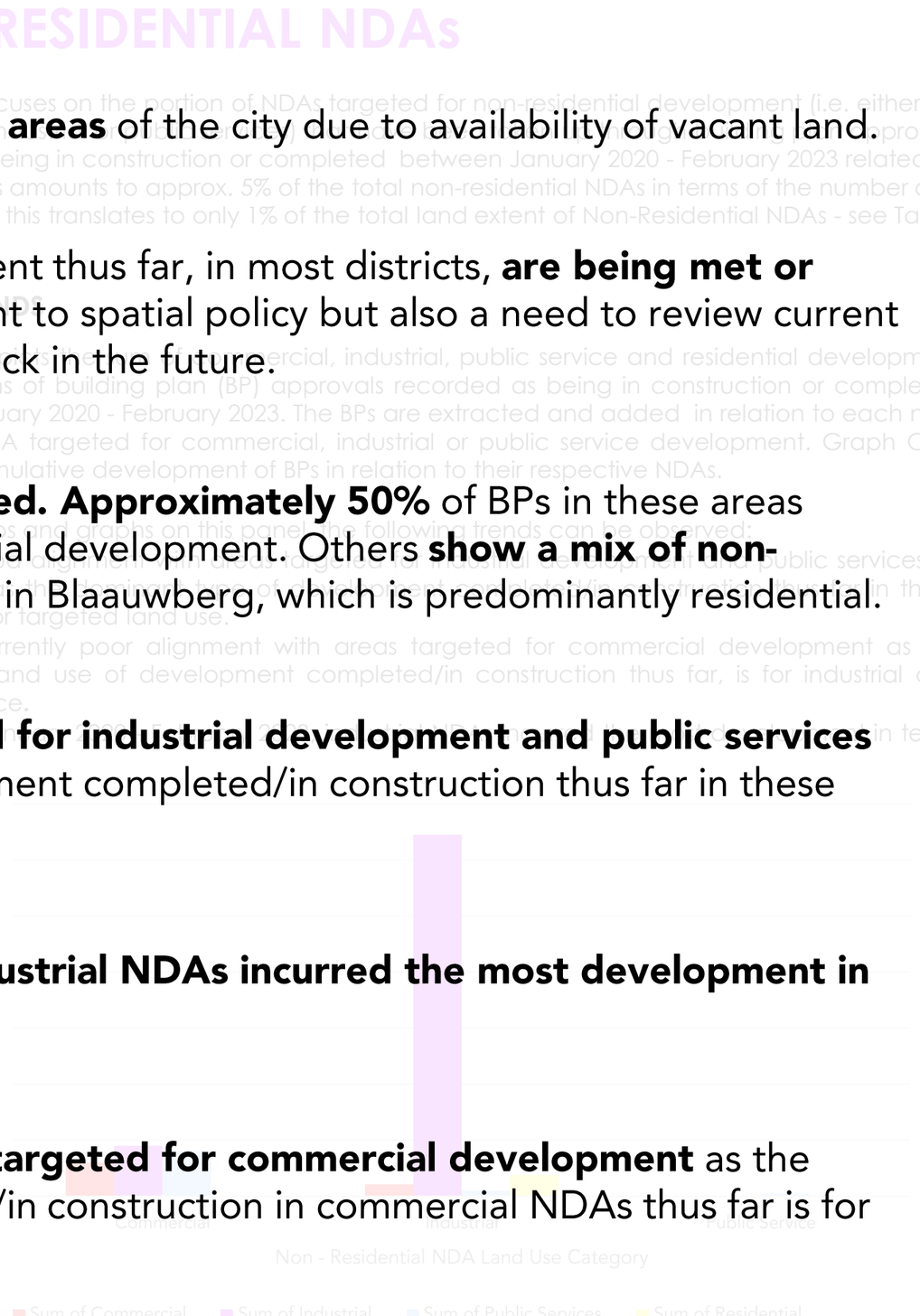
D.1d

TAKE UP OF NEW DEVELOPMENT AREAS

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.

Map D1-d: **Comp[illegible]n-Residential BPs land use in relation to Non-Residential NDAs**



Graph D1-e: **Composition of Non-Residential BPs land use in relation to Non-Residential NDAs**

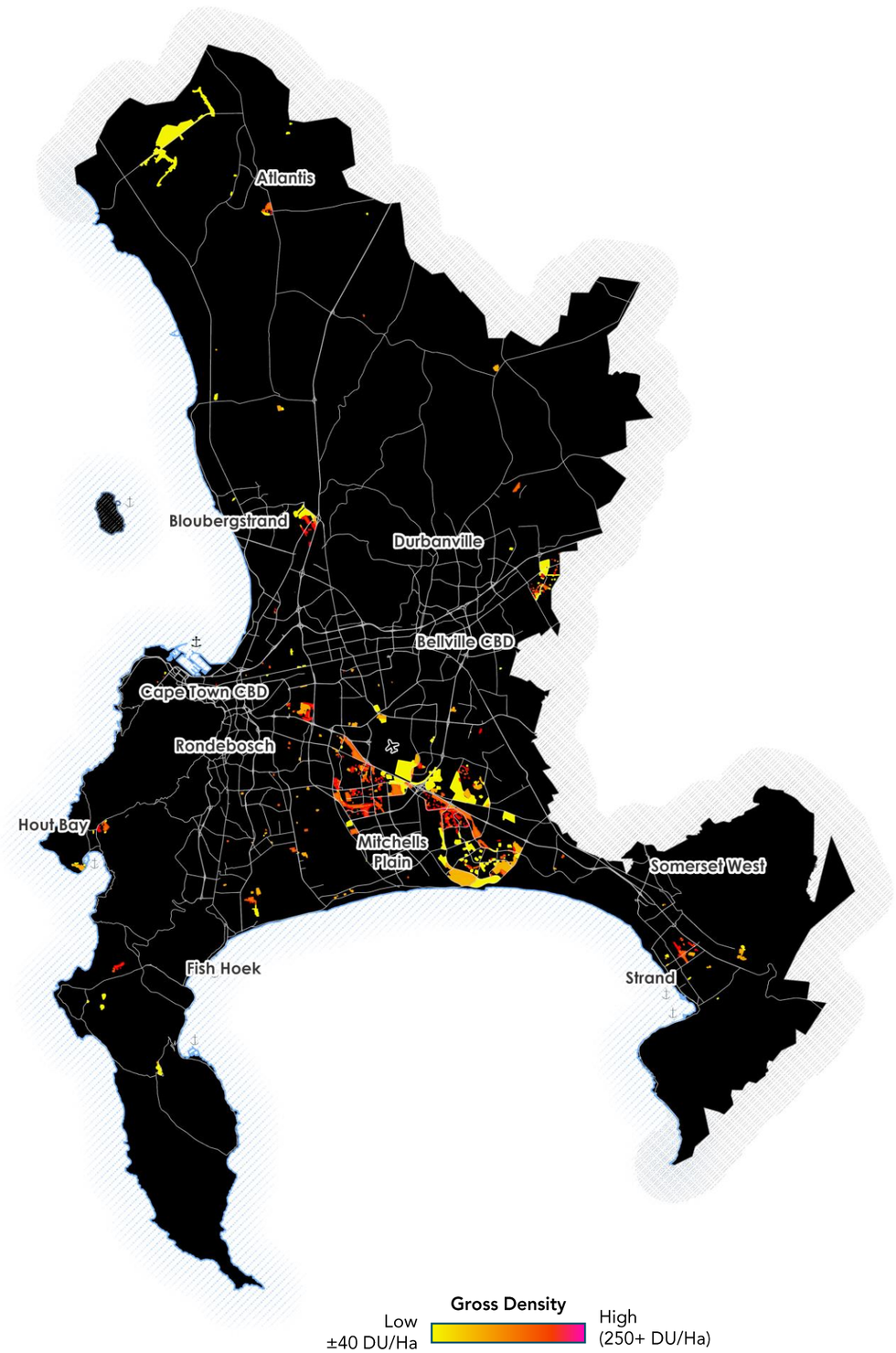
D.2

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 (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Varying location, extent and density of areas of informality (2002-2023)

OVERALL TREND

In late 2023, there were +/- 277 110 informal structures in several areas known as Areas of Informality, of varying size and density in Cape Town. This excludes all informal structures on single residential or other zoned erven known as backyarders or addition dwelling units (informal).
The data indicates a 49% increase in informal settlement structures from 2018 to 2023. 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 classified Area of Informality) of at its maximum footprint (i.e. all areas 2004-2023).

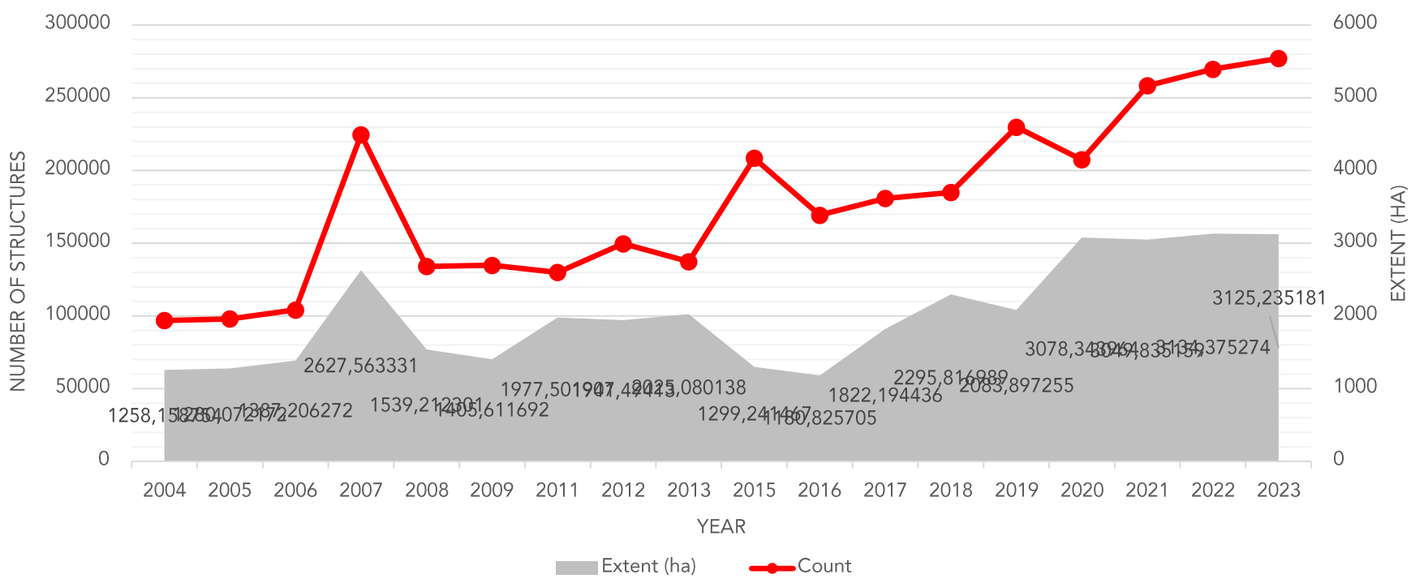
SPATIAL TREND (DISTRIBUTION/ PATTERN)

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 (historically vacant and under-utilised land). Although the location of these clusters remain 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. The areas with the most notable increase in informal settlements are Khayelitsha, Mfuleni, Delft, and Kraaifontein. In contrast, the areas with the largest decrease in informal land extent include Langa and Imizamo Yethu. Since 2019, additional areas have been unlawfully occupied such as the land in Kraaifontein (which were earmarked for government housing) and the Witzands Nature Reserve.

GENERAL ANALYSIS

Areas of informality mostly 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 South East.

Compare the net density on Map D2-a with densities in the rest of the city (indicator C1, C2 and C3). Areas of informality density is significantly higher. Not only because it is calculated as nett but also because of the significant amount of structures. Densities in Areas of Informality aligns with densities of flat complexes but are on one level.



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 changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Table Bay: Varying location, extent and density of areas of informality (2002-2023).

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)

SPATIAL TREND (DISTRIBUTION/PATTERN)

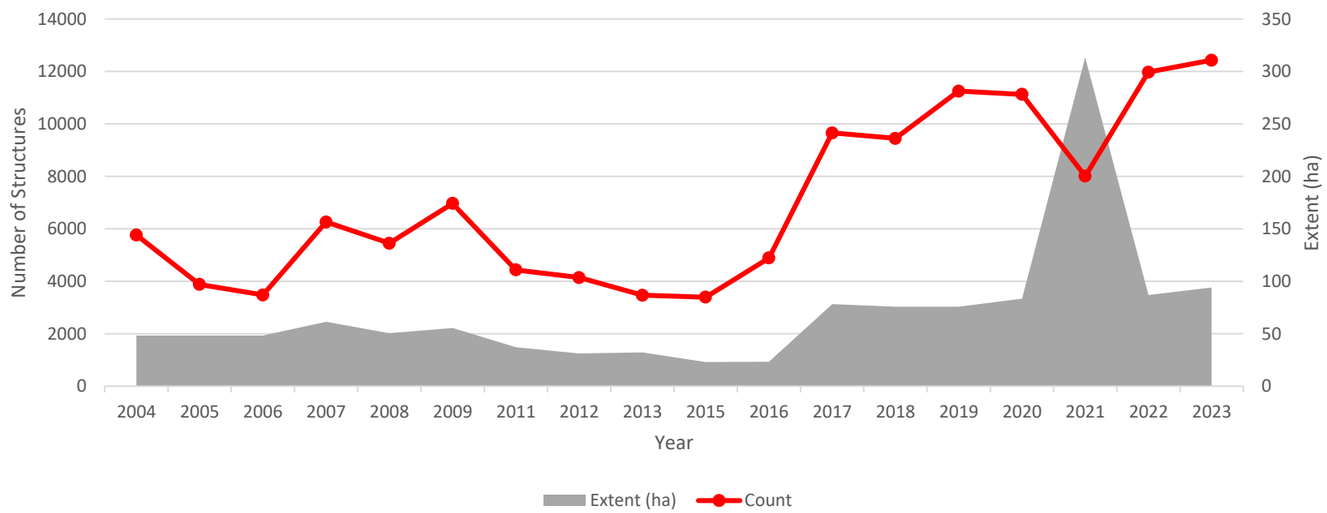
Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the N2, N1 and N7. Within the Table Bay District, areas of informality are concentrated within Langa, which is located along the N2 and is one of the densest area of informality 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 north-eastern 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 areas of informality 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.

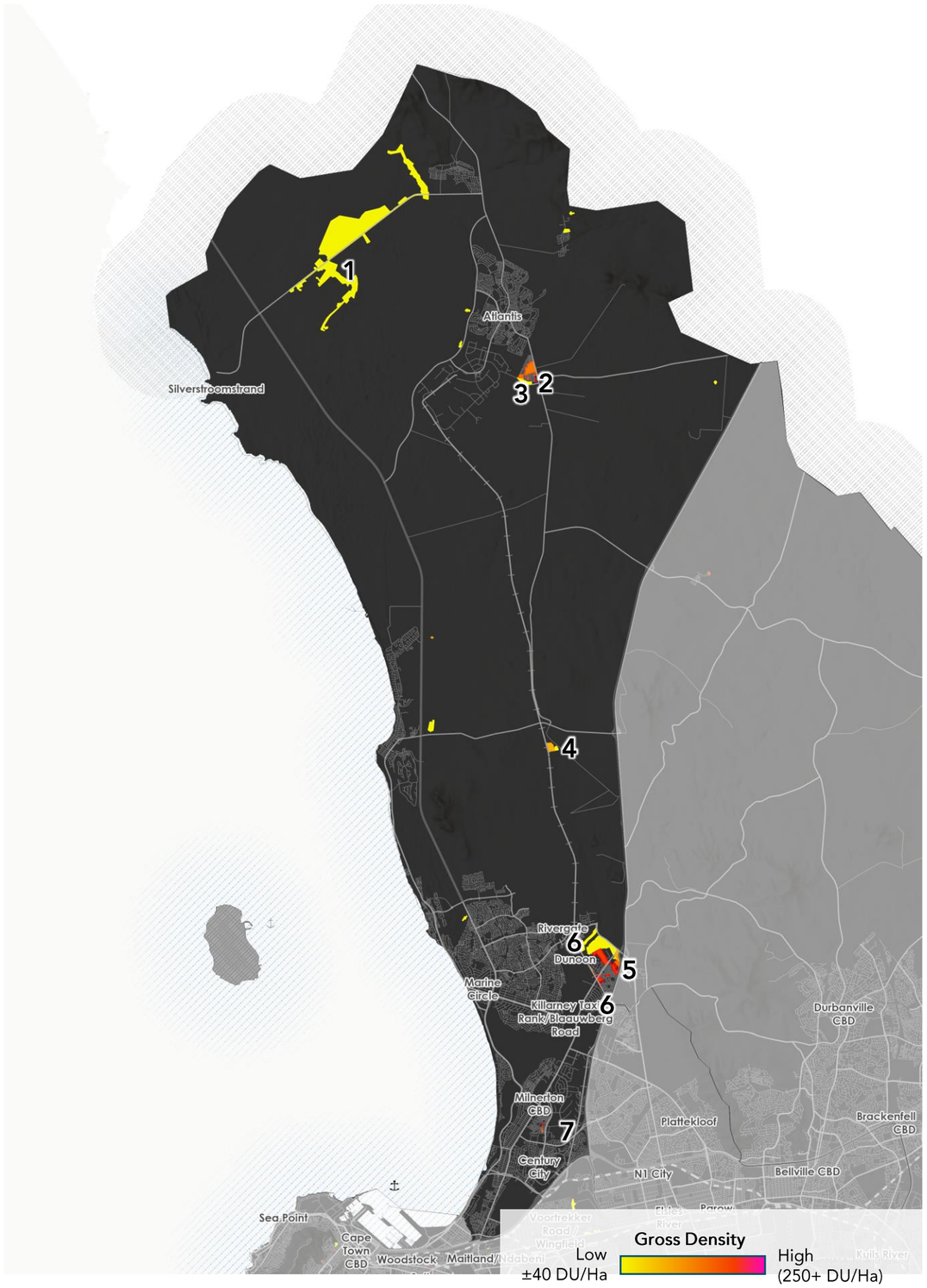
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Blaauwberg: Varying location, extent and density of areas of informality (2002-2023)

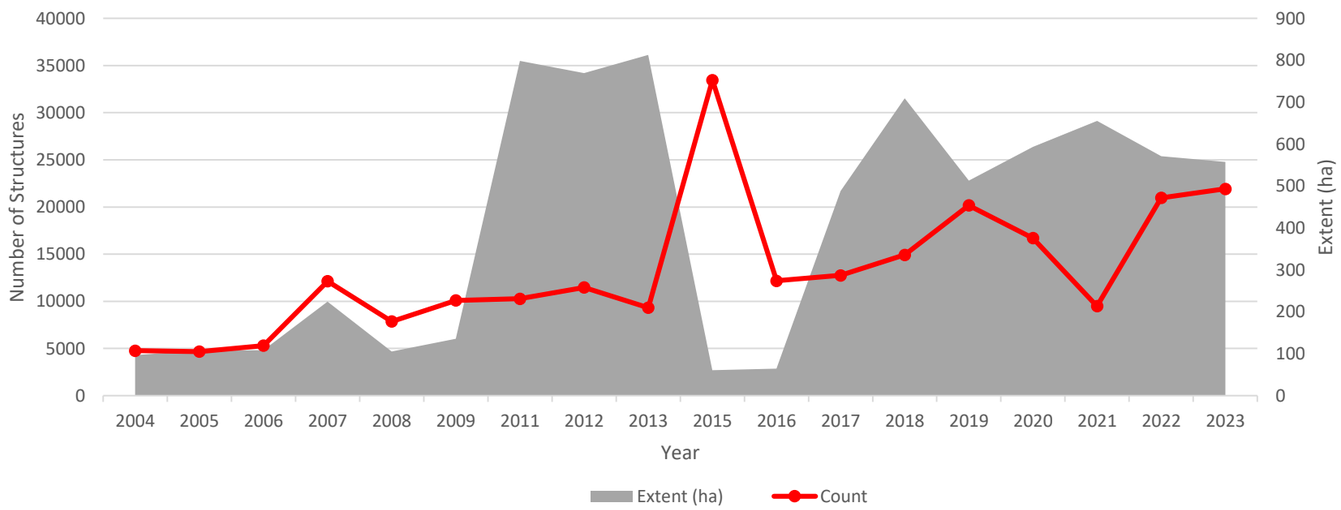
DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

LOCAL LEVEL TRENDS

1. Informal structures and farming along Silverstream Road - Not near existing residential, more low density and related to smallholdings and farming.
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. 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 Du Noon and surrounds - Closely correlated to existing lower-income accommodation, RDP units and proximity to job opportunities in industrial corridor. Transport links to CBD (MyCiTi and taxis) and further in the city are good and not as long as from the Metro South East.
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 as New Development Area, 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 Area of Informality.

There appears to be no correlation in terms of the location of Areas of Informality 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

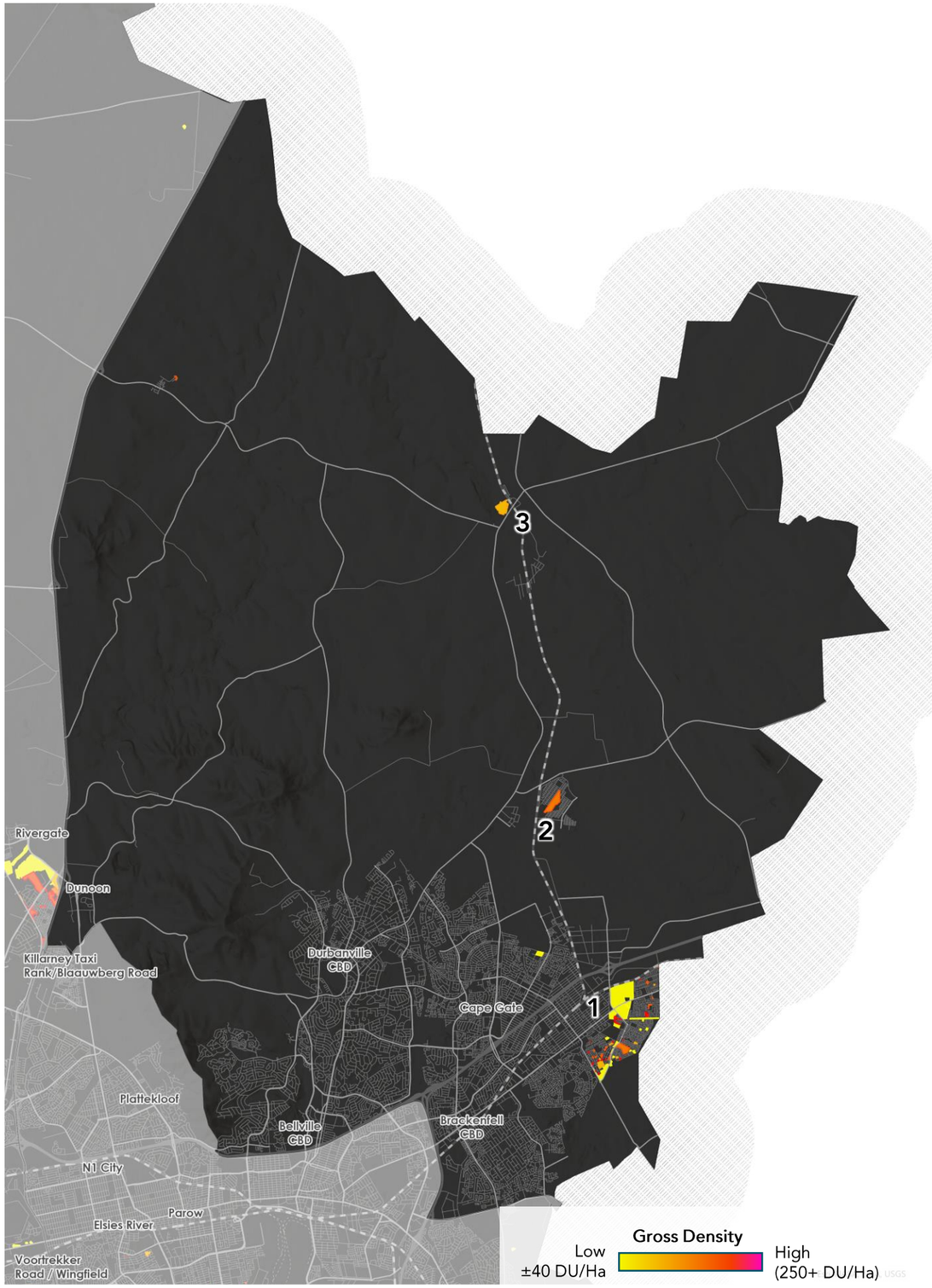
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Northern: Varying location, extent and density of areas of informality (2002-2023)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)

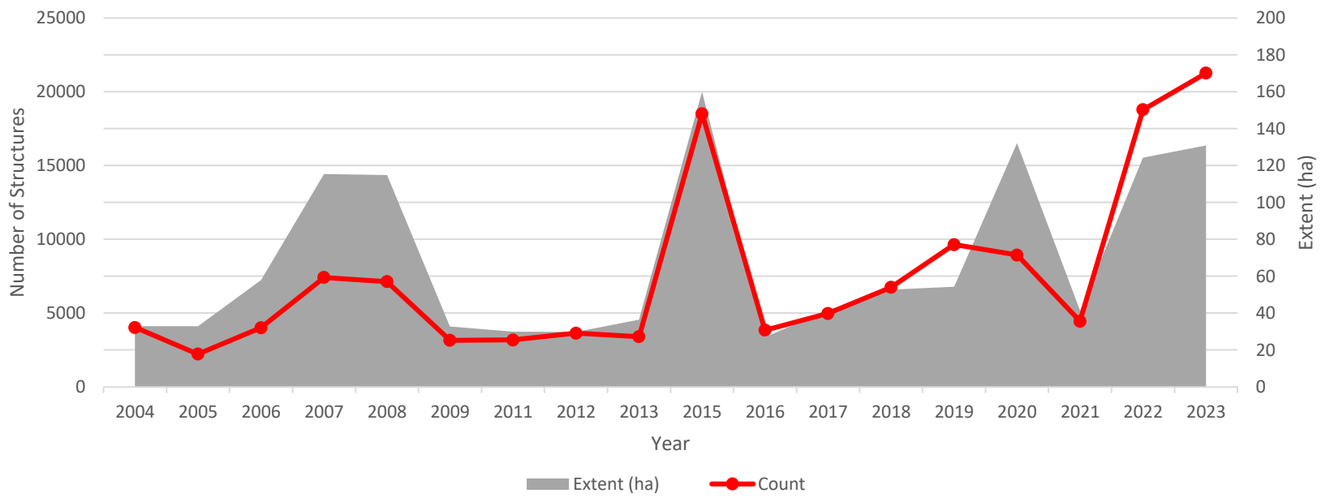
SPACIAL TREND (DISTRIBUTION/PATTERN)

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. There was a significant spike in the number of informal structures in 2015, post-2019 and even more post 2021. 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 a 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/ unlawful land occupation of areas identified as NDAs in 2012 & 2023 District Plans and earmarked for government housing construction programmes (which cannot proceed now anymore).
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 a 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

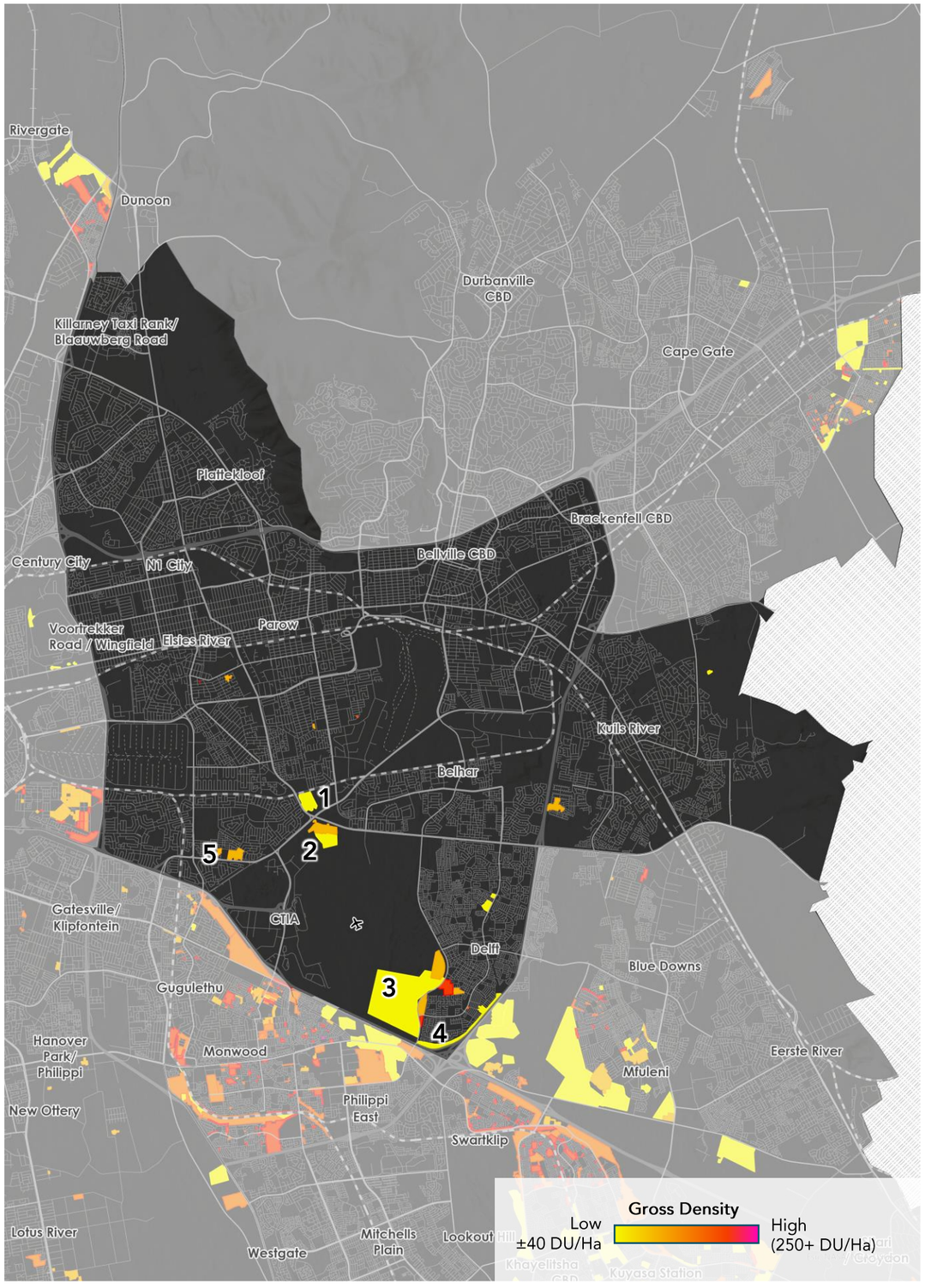
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Tygerberg: Varying location, extent and density of areas of informality (2002-2023)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)

SPATIAL TREND (DISTRIBUTION/PATTERN)

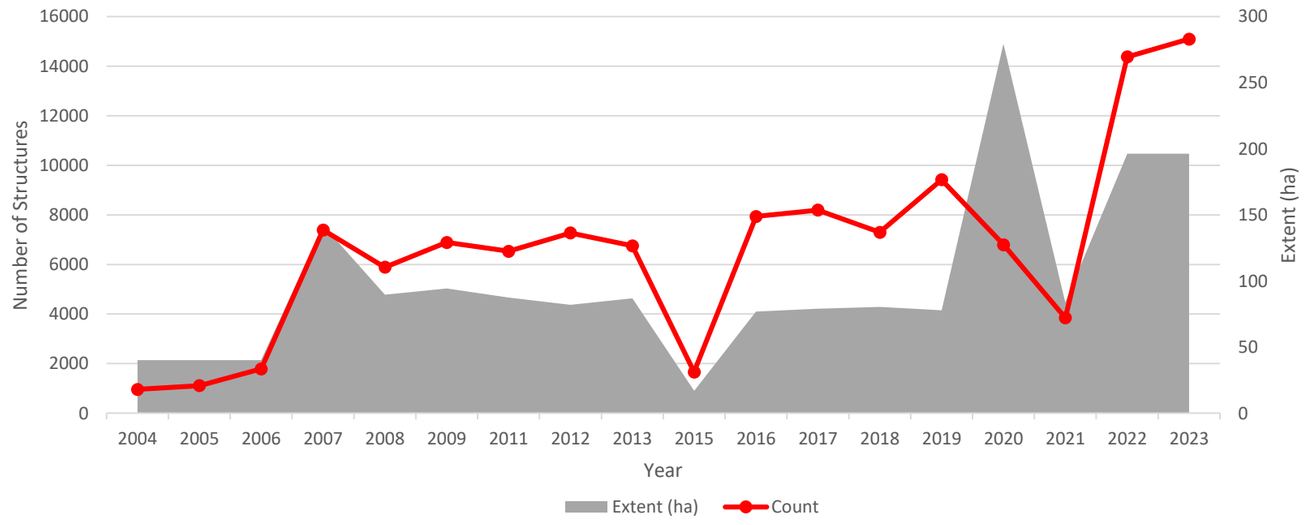
The areas of informality in Tygerberg District mostly occur on land that is not suitable (safe) for residential development such as core biodiversity areas and within noise contours around the Cape Town International Airport, landfill site, wetlands and servitudes. Some of these areas have been identified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

Graph D2-a indicates significant increases in structures since covid.

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

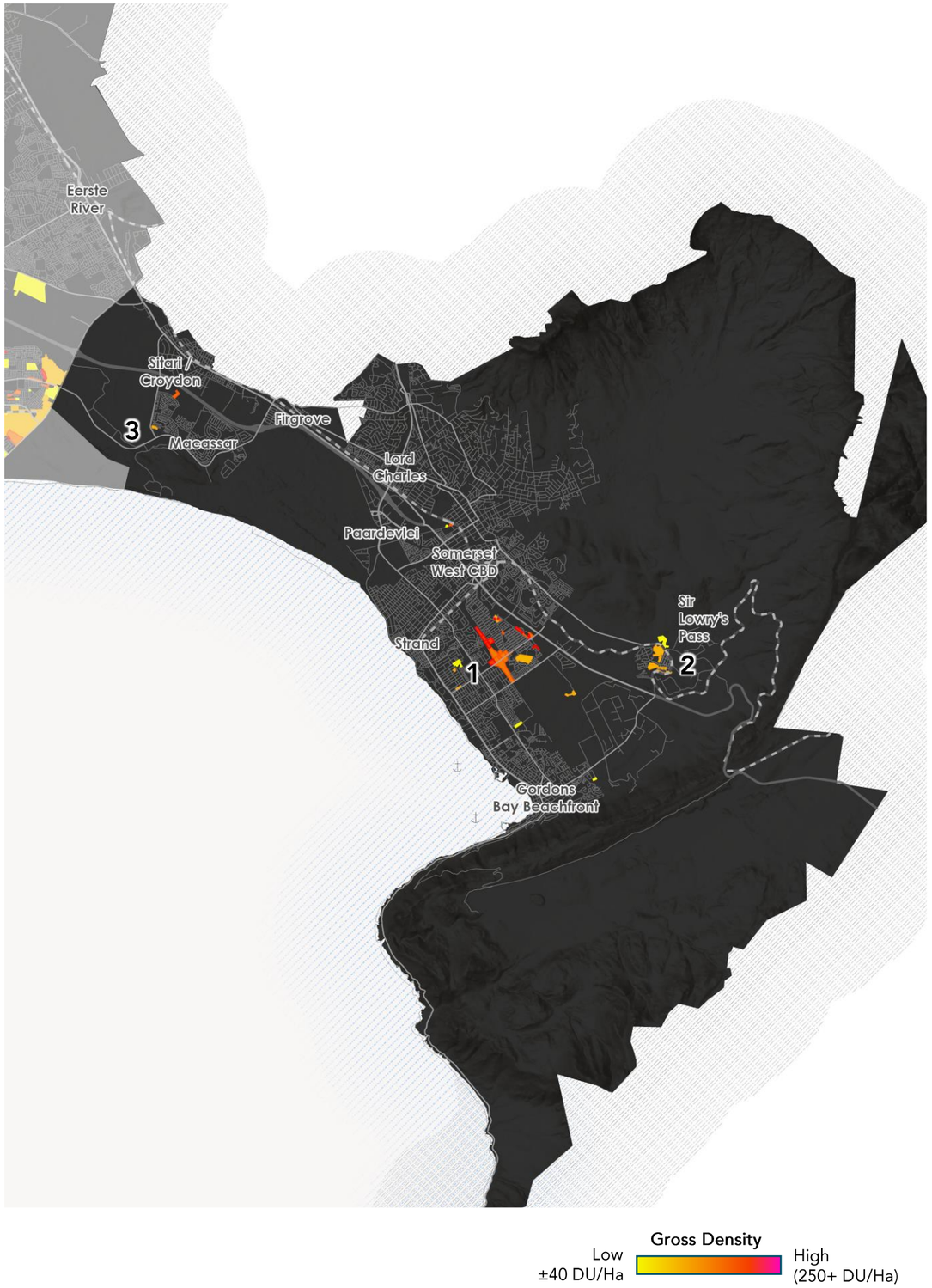
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Helderberg: Varying location, extent and density of areas of informality (2002-2023)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)

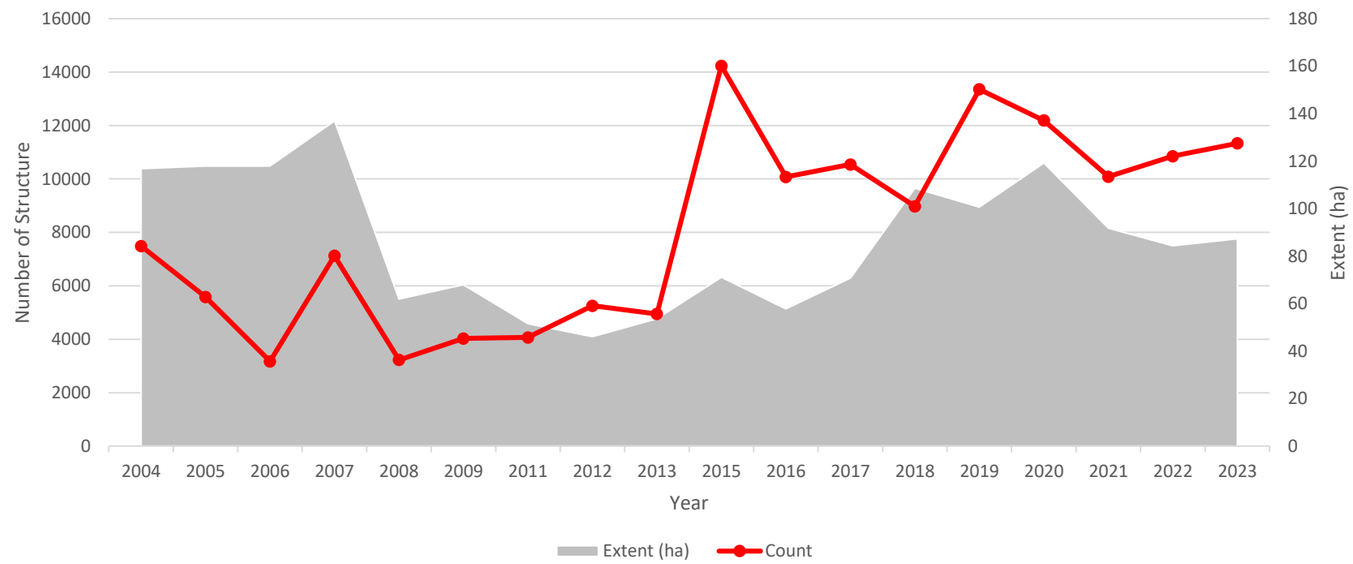
SPATIAL TREND (DISTRIBUTION/PATTERN)

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. Appears some stabilisation ito of numbers of structures after covid and compared to the 2015 significant increase.

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, 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

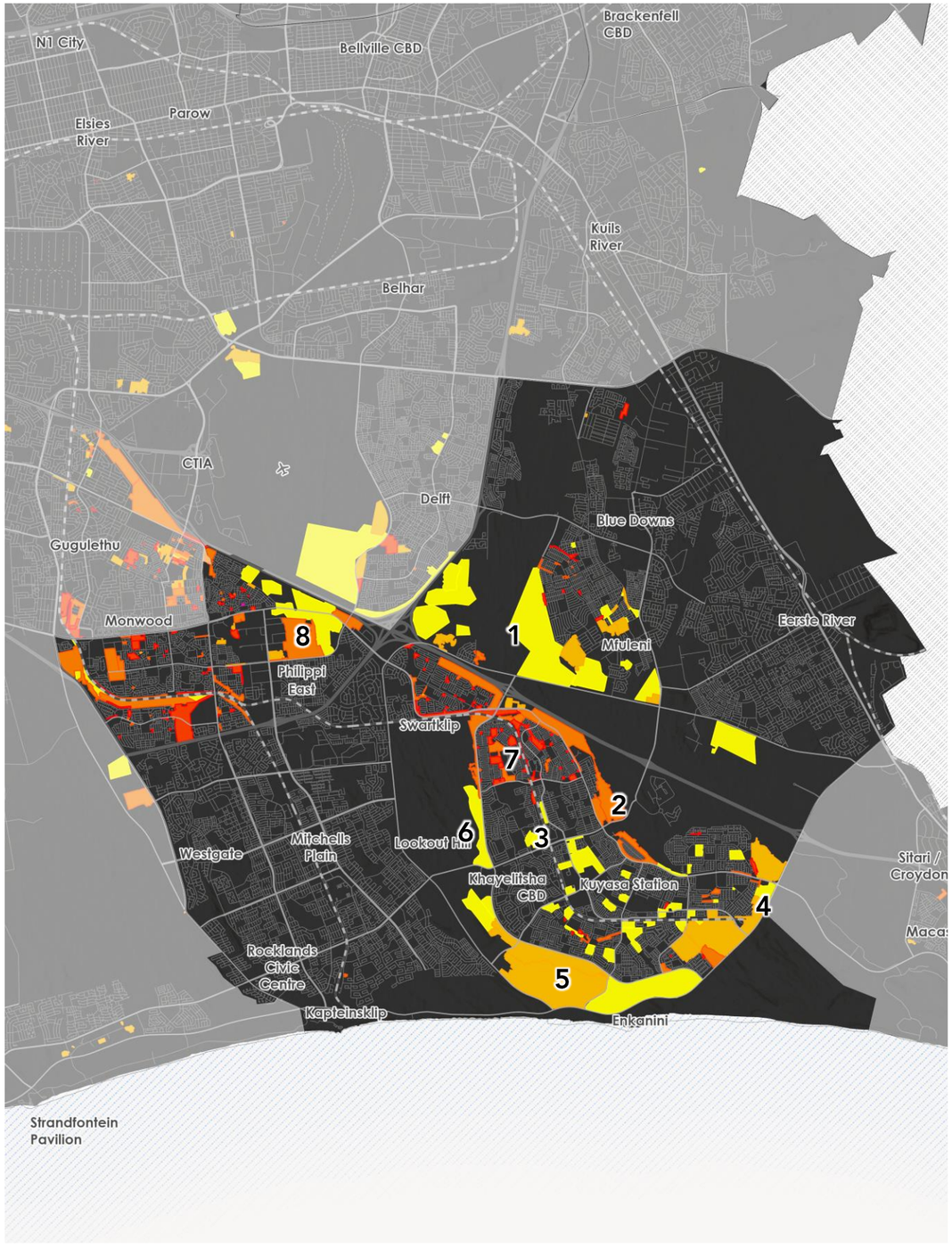
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

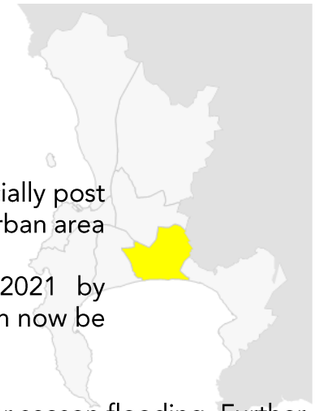
Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: KMPGBD: Varying location, extent and density of areas of informality (2002-2023)

DISTRICT LEVEL ANALYSIS

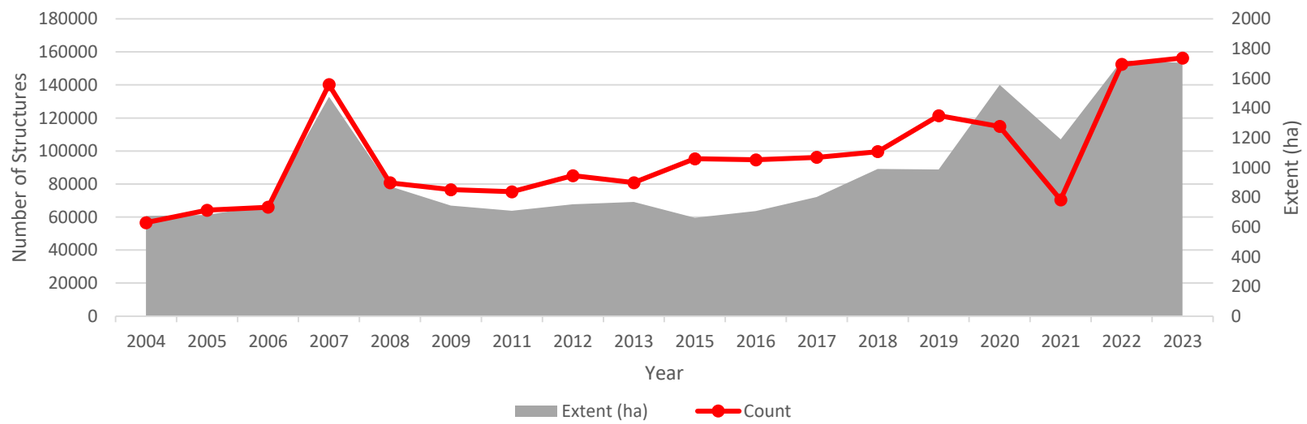
KMPGBD DISTRICT (F)



LOCAL LEVEL TRENDS

The district has seen a significant increase in the number of informal areas over time, especially post covid-19. It has the most informal structures of all district that covers the largest extent of urban area compared to other districts. 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 can now 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 flooding. Further investigation is required to identify other vacant portions of land for permanent housing opportunities to accommodate households that need to be relocated as well as to find land for essential non-residential uses, such as manufacturing, public facilities or 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. Khayalitsha – 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 originally earmarked 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

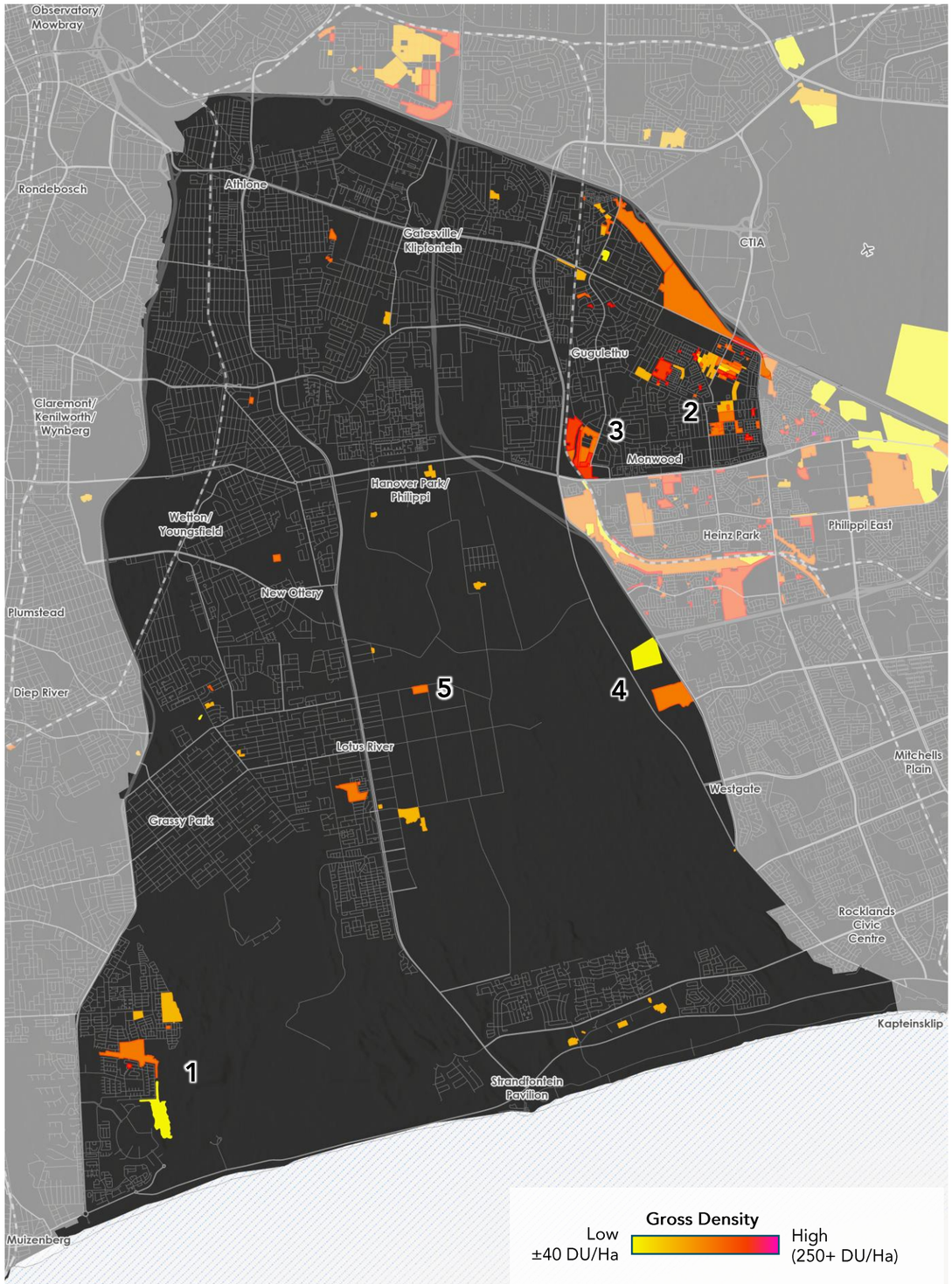
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Cape Flats: Varying location, extent and density of areas of informality (2002-2023)

DISTRICT LEVEL ANALYSIS

CAPE FLATS (G)

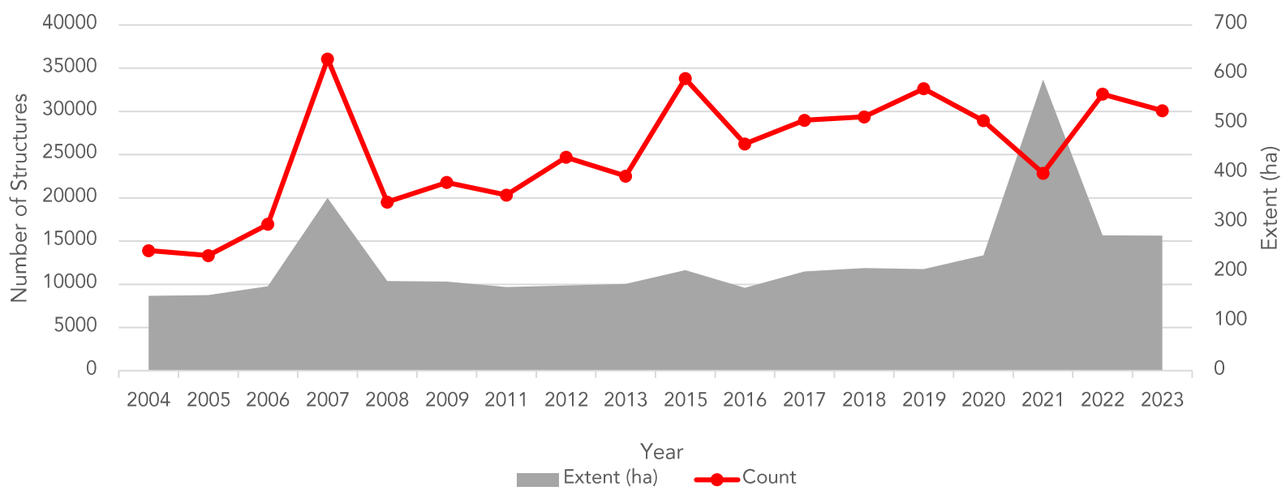
SPATIAL TREND (DISTRIBUTION/PATTERN)

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), and the land parcel north of it is experiencing growth. These changes are not related to any spatial planning categories.
5. Informal settlements in Schaapkraal such as Egoli and Jim se Bos have also increased in size and density.



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

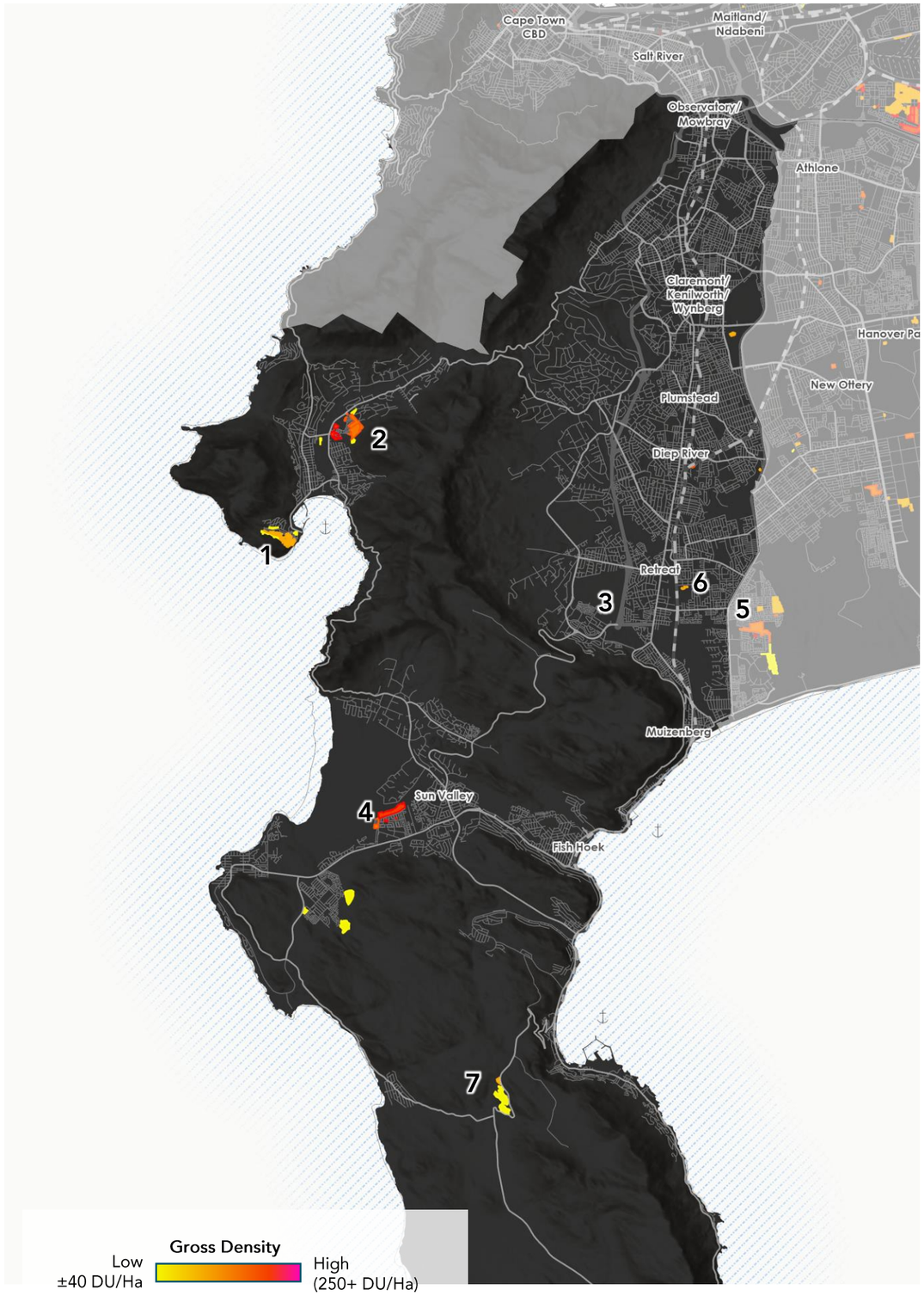
D.2

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent and number of structures) of areas of informality over time (2002-2023).

Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



Map D2-a: Southern: Varying location, extent and density of areas of informality (2002-2023)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)

SPATIAL TREND (DISTRIBUTION/PATTERN)

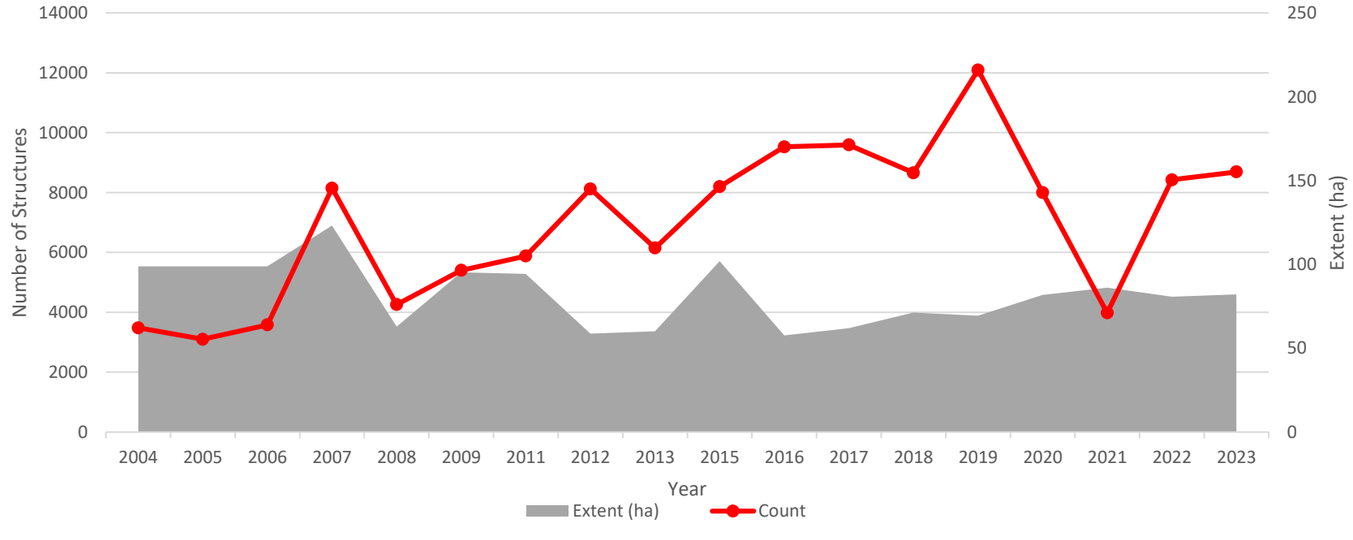
Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the major transport corridors. Informality has almost exclusively been contained to within the existing informal areas in the Southern 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 significant informality exists within the district:

1. Hangberg
2. Imizamo Yethu
3. Westlake
4. Masiphumelele
5. Steenberg
6. Retreat
7. Red Hill



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

D.2

AREAS OF INORMALITY

KEY TAKE-AWAY TRENDS:

- Areas of informality display a spatial pattern of clustering that is either **embedded in or in close proximity to lower income areas**, with larger clusters forming along major movement routes like the N2, N1 and N7. Although the location of these clusters **remains fairly consistent, there are changes in extent and density over time.**

- As of 2023 the average net density for areas of informality is 88 du/ha across the City.

- Areas with the most notable **increase in informal settlements are Khayelitsha, Mfuleni, Delft, and Kraaifontein**. In contrast, the areas with **the largest decrease** in informal land extent include **Langa and Imizamo Yethu.**

- **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.**

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

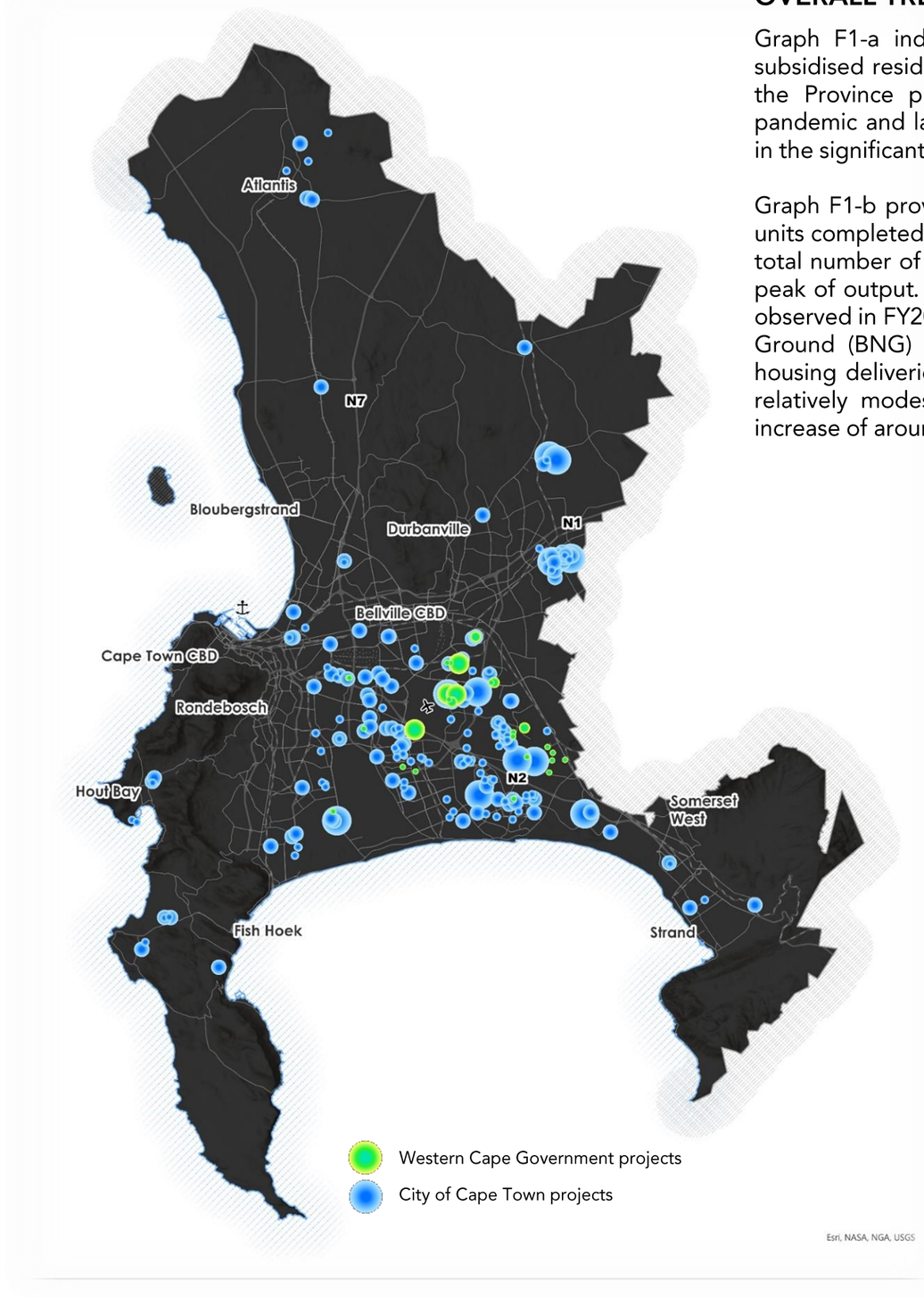
F.1

PUBLIC INVESTMENT

GOVERNMENT-SUBSIDISED HOUSING

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

Source: WCG&CCT Human Settlements Projects (2013-2023)



Map F1-a: Government-assisted housing completed (2013-2022/2023)
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 2022/23, 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.

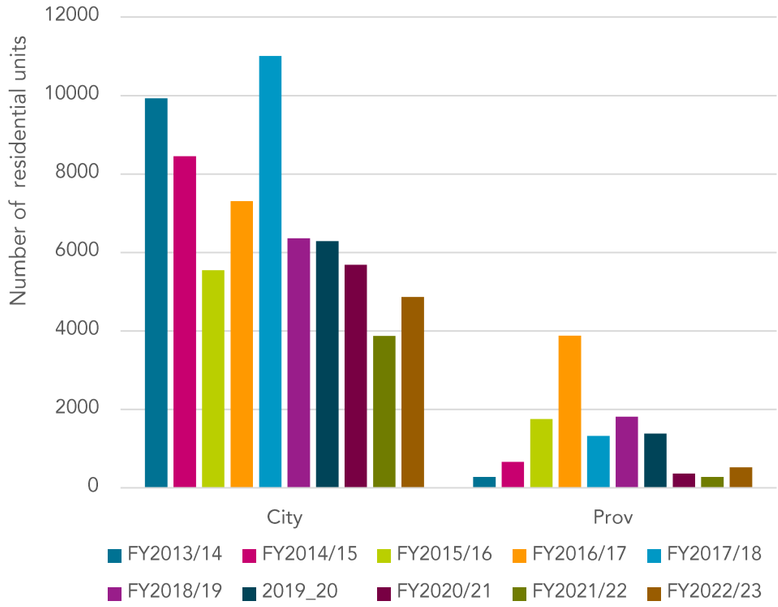
Graph F1-b provides a breakdown of the proportions and types of subsidy units completed over the past decade. There has been a clear decline in the total number of housing units delivered since FY2017/18, which marked the peak of output. This downward trend persists, with particularly sharp drops observed in FY2021/22 and FY2022/23. Throughout the years, Breaking New Ground (BNG) projects have consistently made up the largest share of housing deliveries. While both rental (CRU) and social housing have shown relatively modest yet stable contributions, social housing saw a notable increase of around 4.5% in FY2022/23 compared to the previous year.

SPATIAL TREND (PATTERN/ DISTRIBUTION)

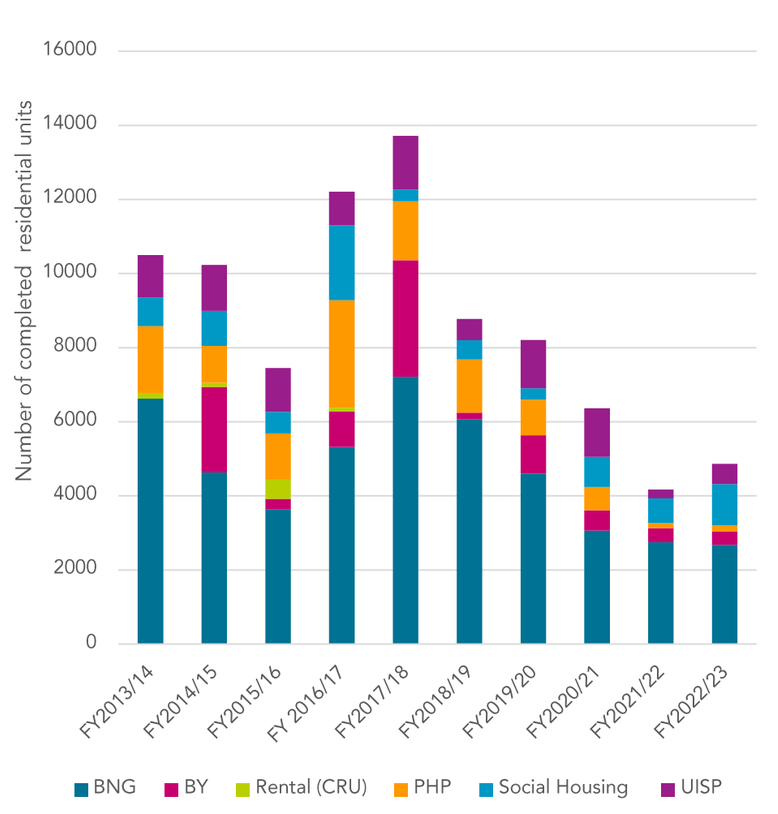
Map F1-a illustrates the concentrations and relative size of the human settlements projects cumulatively over the past decade. This includes all sites and top structures added together as residential opportunities. Most of the projects were located in the Metro South East of the city, closest to the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

Majority of projects are concentrated within Urban Support Areas, as identified in district spatial plans, with cumulatively approximately 39,415 city and 6,049 provincial housing opportunities situated in these areas. Most of the provincial projects were located in Delft, Belhar and some in Wallacedene/ Bloekombos (north east), while the City's largest projects can be seen in Blue Downs, Mfuleni Scottsdene/ Wallacedene and new developments in Fisantekraal

Compared with indicator C7 (previous report), very few formally registered property (re)sale transactions were concluded since 2013/14 in the Metro South East, 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 which does not appear as Deeds Office transfers.



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



Graph F1-b: Types of housing opportunities completed

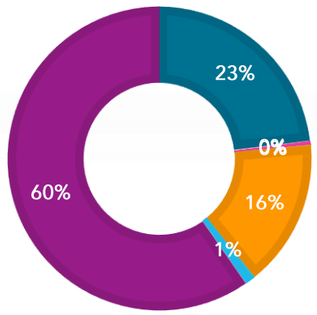
F.1

PUBLIC INVESTMENT

PLANNED GOVERNMENT-SUBSIDISED HOUSING

This indicator displays the long-term housing pipeline of the City's and Western Cape Provincial Government's departments of Human Settlements as of 2023/24.

Source: WCG&CCT Human Settlements Project Pipeline (2013-2023)



Graph F1-a: Number of state planned Residential Units as at 2023/24

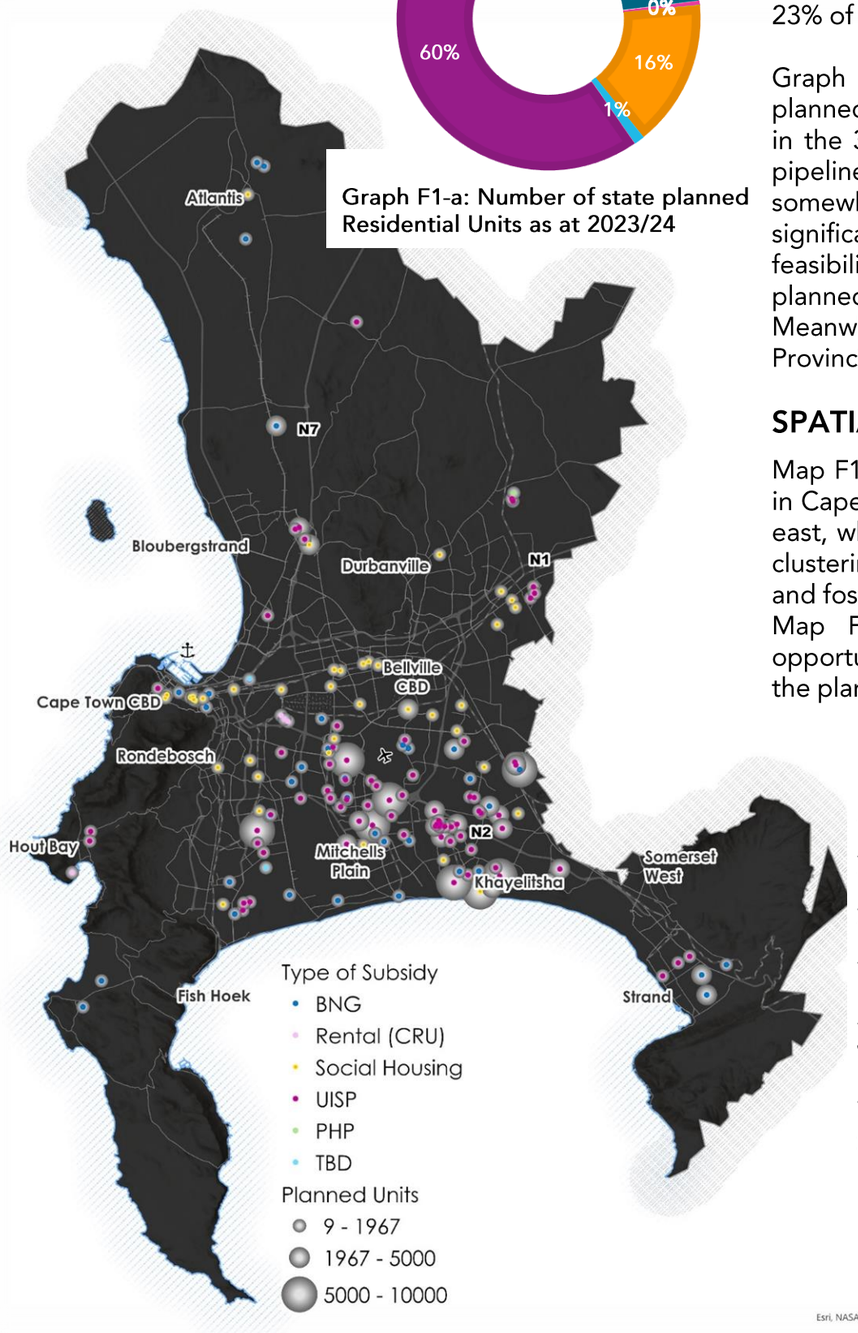
OVERALL TREND

Graph F1-a indicates that UISP comprises the largest portion, accounting for 60% of long term planned government-subsidized housing initiatives in Cape Town. While BNG housing accounts for 23% of the planned subsidized housing portfolio.

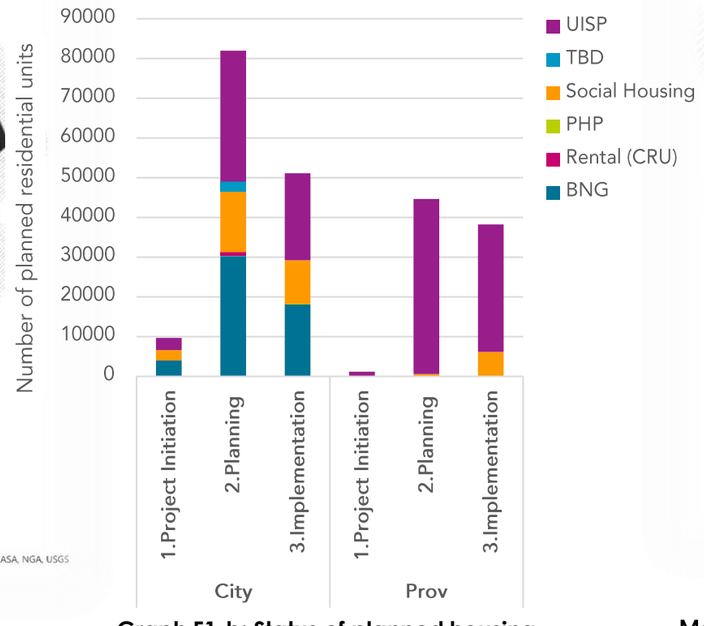
Graph F1-b indicates that City of Cape Town has a substantial planned housing delivery pipeline, with approximately 142,695 units in the 30+ year pipeline. In contrast to the City's housing delivery pipeline, the planned provincial housing opportunities appear to be somewhat lower, with around 84,025 opportunities available. A significant portion of the housing pipeline is in the planning and feasibility stages, comprising approximately 57% of the City's planned housing portfolio and 53% of the provincial pipeline. Meanwhile, 36% of the City's pipeline and about 43% of the Provincial pipeline are in the implementation stage.

SPATIAL TREND (PATTERN/ DISTRIBUTION)

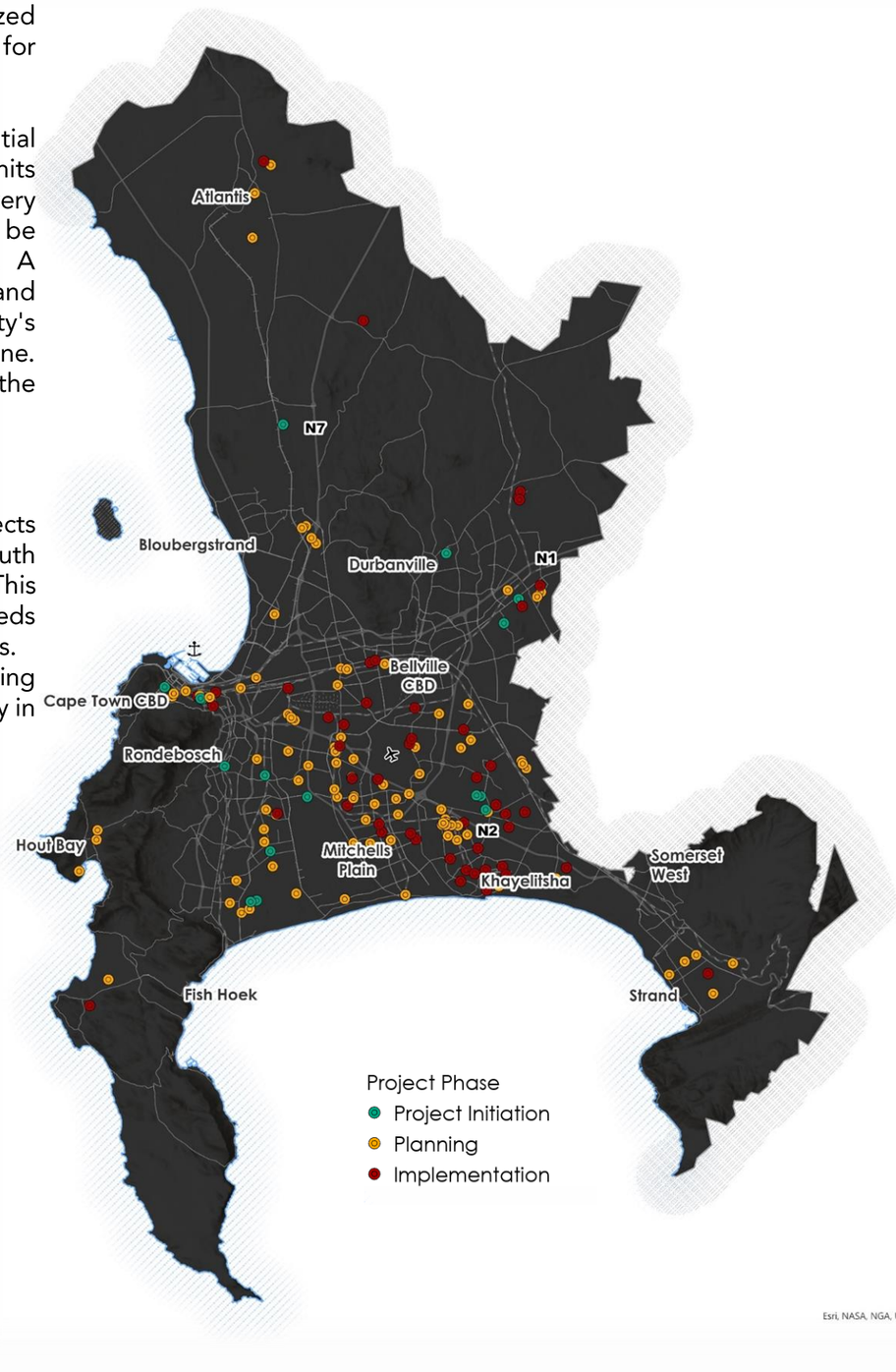
Map F1-a shows the spatial distribution of planned housing projects in Cape Town. The map indicates a concentration in the metro south east, where approximately 5,000 to 10,000 units are projected. This clustering suggests a strategic focus on addressing housing needs and fostering urban development in this urban support focus areas.
Map F1-b illustrates the various stages of planned housing opportunities in Cape Town, with the majority of projects currently in the planning and implementation phase.



Map F1-b: Planned Housing units per subsidy (2023/24)
Source: City of Cape Town and Provincial Departments of Human Settlements



Graph F1-b: Status of planned housing



Map F1-c: Planned Government-assisted housing Project Status (2023/24)
Source: City of Cape Town and Provincial Departments of Human Settlements

F.1

GOVERNMENT-SUBSIDISED HOUSING

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).
  - Housing delivery showed an initial increase from 10,210 units in FY2013/14 to a peak of around 12,000 units in FY2017/18.
  - After FY2017/18, there was a steady decline, with the total number of units declining to just over 4, 000 units in FY2021/22—a decrease of 8,000 units or 66% compared to the peak year.
  - FY2022/23 saw a slight recovery with approximately 4,867 units, a 17.1% increase from FY2021/22.
- The most notable trend in recent years (FY2021/22 and FY2022/23) is the broad decline across all categories of housing projects, with much lower delivery numbers compared to earlier years.
- **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 the majority are located in Urban Support Areas of the city.
- The housing pipelines seems extremely large but is a single figure for a very long term future and would all be budget and process dependent.

Map D1-a: **Government-assisted housing completed (2013-2022/Q3 2023).**
Source: City of Cape Town and Provincial Departments of Human Settlements

Graph D1-a: **Number of state-provided residential units.**

Graph D1-b: **Types of housing opportunities completed.**

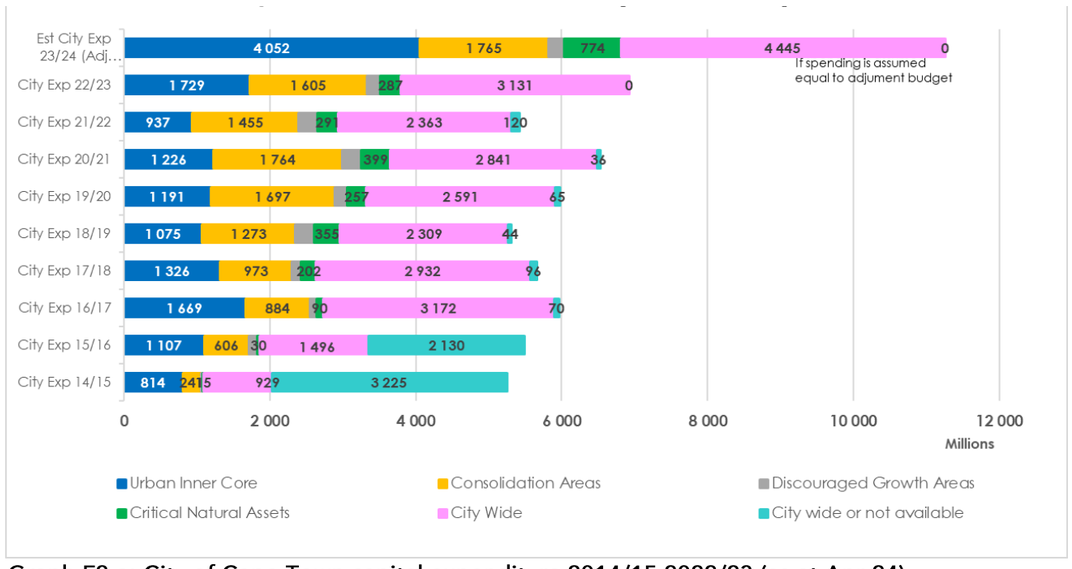
F.2

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.

Source: City of Cape Town Finance Dept (Apr 2024)



Graph F2-a: City of Cape Town capital expenditure 2014/15-2022/23 (as at Apr 24) per MSDF Spatial Transformation Area (2022/23 estimated as equal to budget)

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 around R7b in 2022/23. It is estimated that expenditure will increase to over R11b in June 2024 (graph F2-a). Spatial mapping of the precise location of capital expenditure in the C3PM system commenced in 2015 (refer to next page).

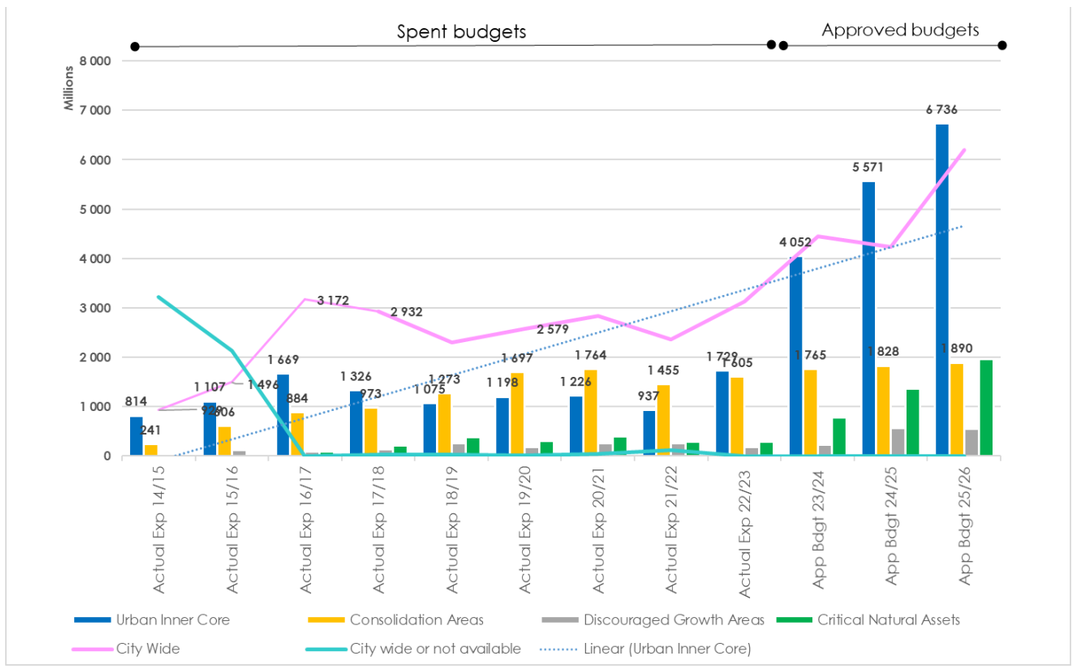
The largest group of projects is still classified as those benefiting the Cape Town municipal area at large (indicated as 'citywide' benefits on graph F2-a). These include projects such as waterpipe and meter replacements; sewer pump station upgrades and pipe replacements; road upgrades; informal settlement 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 an estimated fourfold total of R4,4b in 2023/24.

Projects with clear locations in the UIC, rapidly increased due to system correction and spatial targeting, increasing for less than R1b in 2014/15 to over R4b in 2023/24. Coupled with the IGCA, the investment of approximately R8b is intended for the area within the planned urban development area of the City in order to facilitate new development and upgrading of existing infrastructure. Capital expenditure in the critical natural assets were not clearly visible in 2014/15, but is estimated to significantly increase to approximately R780m in the current financial year (graph F2-a).

SPATIAL TREND (DISTRIBUTION/ PATTERN)

Projects located in the UIC and the IGCAs 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. There was an anticipated increase in the potential spending by the City in all of the STAs, especially in the UCI and IGCA, with a clear increase from around 43% (R2.55b) of all spending in 2016/17 to 48% (R3.3b) in 2022/23, and an anticipated 53% (R5.81b) in 2023/24 (if spending is equal to the adjustment budget in Jan 2024). This increase can be ascribed to the fact that large bulk engineering services network improvements such as the waste water treatment works and bulk water regional distribution pipelines, are located or targeted to serve the existing urban areas or those earmarked for short term development. The estimated expenditure in the CNA areas is a result of the City's 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, IGCAs, DGA or the CNAs.



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

GENERAL ANALYSIS

Graph F2-b shows a rapid increase in anticipated capital expenditure in the UIC more so than in the IGCA. This is as an illustration of the focus on alignment with the MSDF and the location of the large very costly infrastructure projects like the Bus Rapid Transport and the Upgrading of Waste Water Treatment Works. 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 at R4b or R5.5b or R6.7b) in the UIC than the historical expenditure between 2017/18-2021/22 (which was around R1.3). 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.

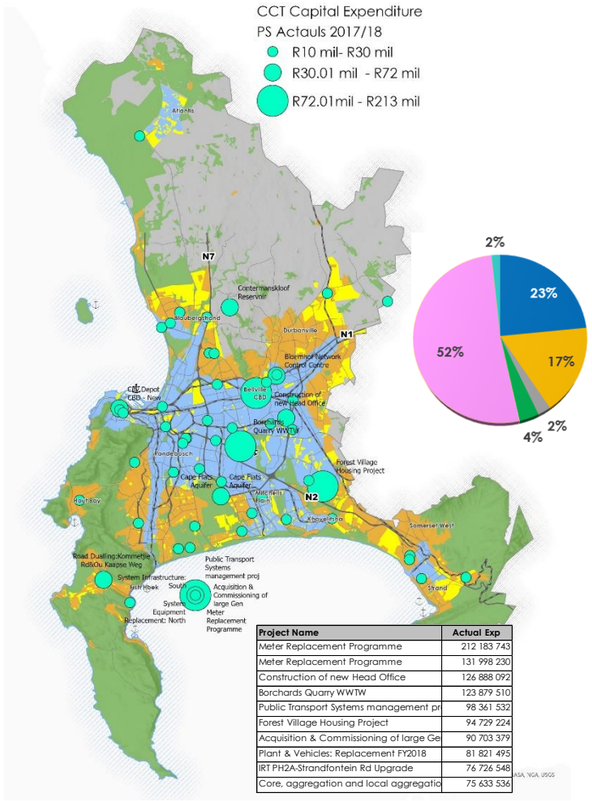
Data Source: City of Cape Town Finance Dept (Apr 2024)

Map Series F2b-a: City capital expenditure 2015/16-2023/24

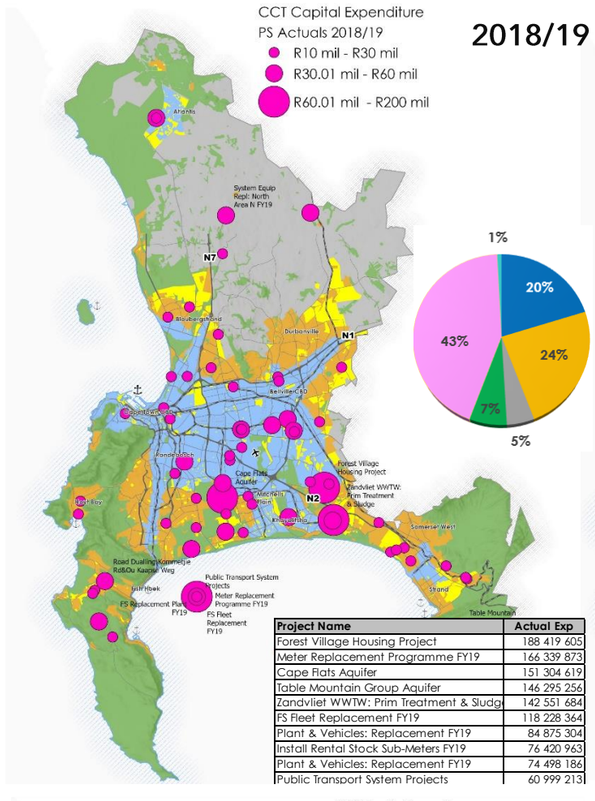
OVERALL TREND

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.

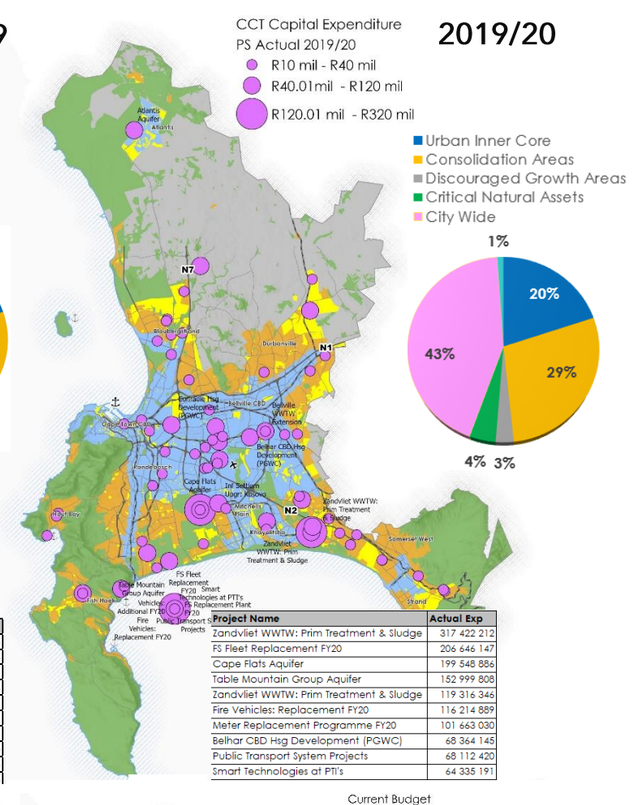
In almost all cases during the past seven financial years, the most expensive capital projects were related to bulk and systems engineering network upgrades (including water meter replacements), IRT, human settlement projects, fleet replacement and in two years, land acquisition. More recently, the engineering 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.



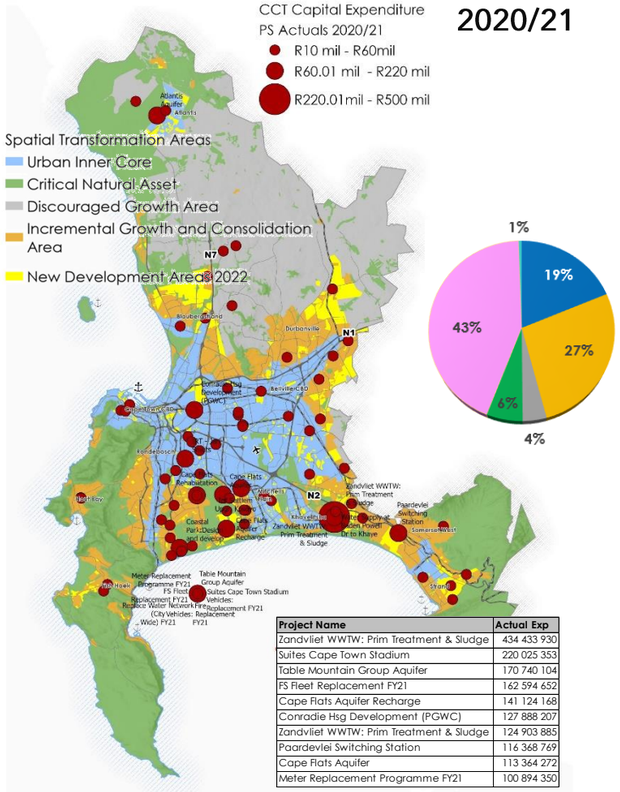
Project Name	Actual Exp
Meter Replacement Programme	212 183 743
Meter Replacement Programme	131 998 230
Construction of new Head Office	126 888 092
Borchards Quarry WWTW	123 879 510
Public Transport Systems management pr	98 361 532
Forest Village Housing Project	94 729 224
Acquisition & Commissioning 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



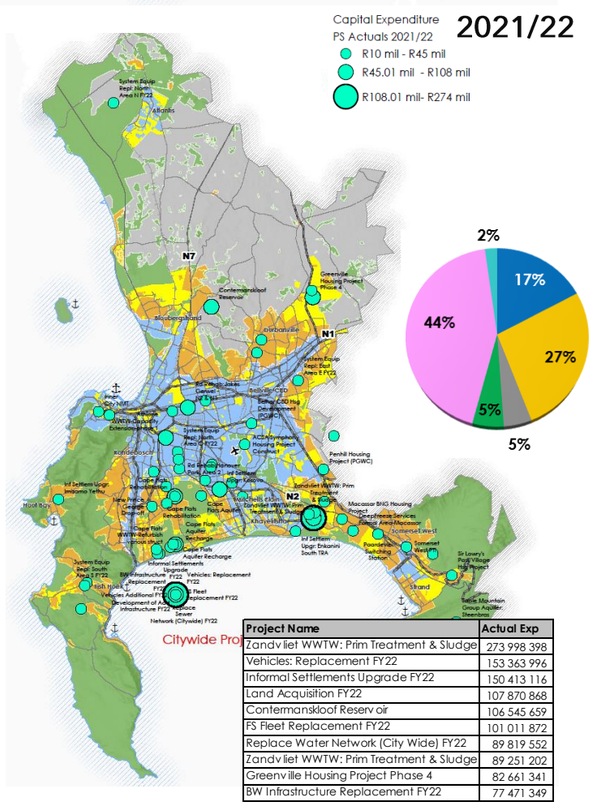
Project Name	Actual Exp
Forest Village Housing Project	188 419 605
Meter Replacement Programme FY19	166 339 873
Cape Flats Aquifer	151 304 619
Table Mountain Group Aquifer	146 295 256
Zandvliet WWTW: Prim Treatment & Sludg	142 551 684
FS Fleet Replacement FY19	118 228 364
Plant & Vehicles: Replacement 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



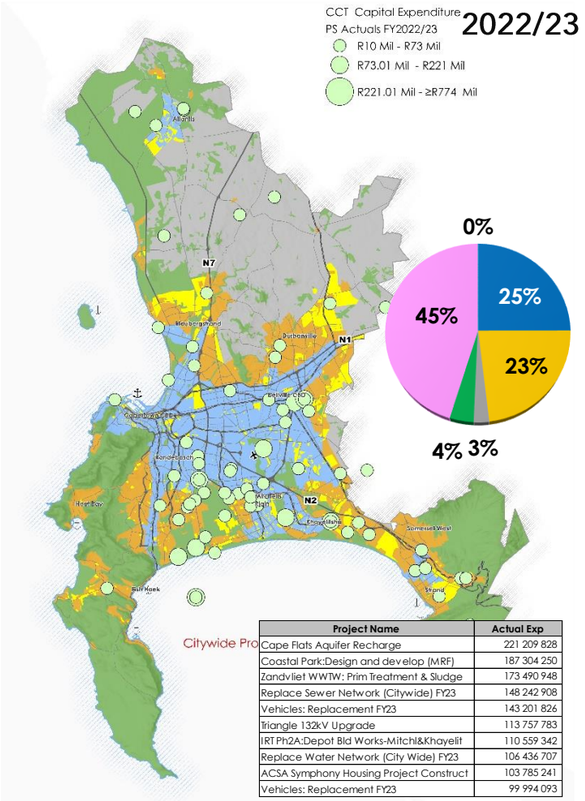
Project Name	Actual Exp
Zandvliet WWTW: Prim Treatment & Sludge	317 422 212
FS Fleet Replacement FY20	206 646 147
Cape Flats Aquifer	199 548 886
Table Mountain Group Aquifer	152 999 808
Zandvliet WWTW: Prim Treatment & Sludge	119 316 346
Fire Vehicles: Replacement FY20	116 214 889
Meter Replacement Programme 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



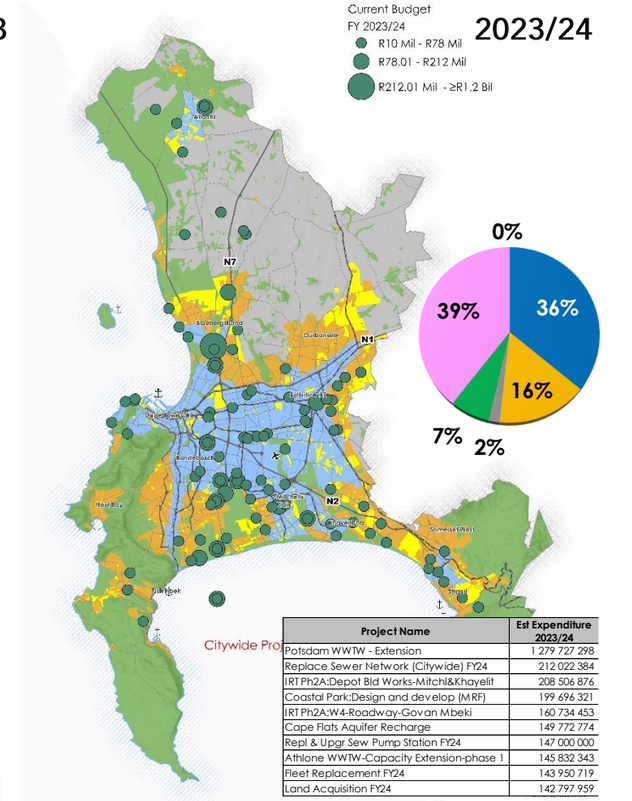
Project Name	Actual Exp
Zandvliet WWTW: Prim Treatment & Sludge	434 433 930
Suites Cape Town Stadium	220 025 353
Table Mountain Group Aquifer	170 740 104
FS Fleet Replacement FY21	162 594 652
Cape Flats Aquifer Recharge	141 124 168
Conradie Hsg Development (PGWC)	127 888 207
Zandvliet WWTW: Prim Treatment & 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
Zandv liet 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
Zandv liet WWTW: Prim Treatment & Sludge	89 251 202
Greenville Housing Project Phase 4	82 661 341
BW Infrastructure Replacement FY22	77 471 349



Project Name	Actual Exp
Cape Flats Aquifer Recharge	221 209 828
Coastal Park:Design and develop (MRF)	187 304 250
Zandvliet WWTW: Prim Treatment & Sludge	173 490 948
Replace Sewer Network (Citywide) FY23	148 242 908
Vehicles: Replacement FY23	143 201 826
Triangle 132kV Upgrade	113 757 783
IRT Ph2A:Depot Bld Works-Mitchl&Khayelit	110 559 342
Replace Water Network (City Wide) FY23	106 436 707
ACSA Symphony Housing Project Construct	103 785 241
Vehicles: Replacement FY23	99 994 093



Project Name	Est Expenditure 2023/24
Potsdam WWTW - Extension	1 279 727 298
Replace Sewer Network (Citywide) FY24	212 022 384
IRT Ph2A:Depot Bld Works-Mitchl&Khayelit	208 506 876
Coastal Park:Design and develop (MRF)	199 696 321
IRT Ph2A:W4-Roadway-Govan Mbeki	160 734 453
Cape Flats Aquifer Recharge	149 772 774
Repl & Upgr Sew Pump Station FY24	147 000 000
Athlone WWTW-Capacity Extension-phase 1	145 832 343
Fleet Replacement FY24	143 950 719
Land Acquisition FY24	142 797 959

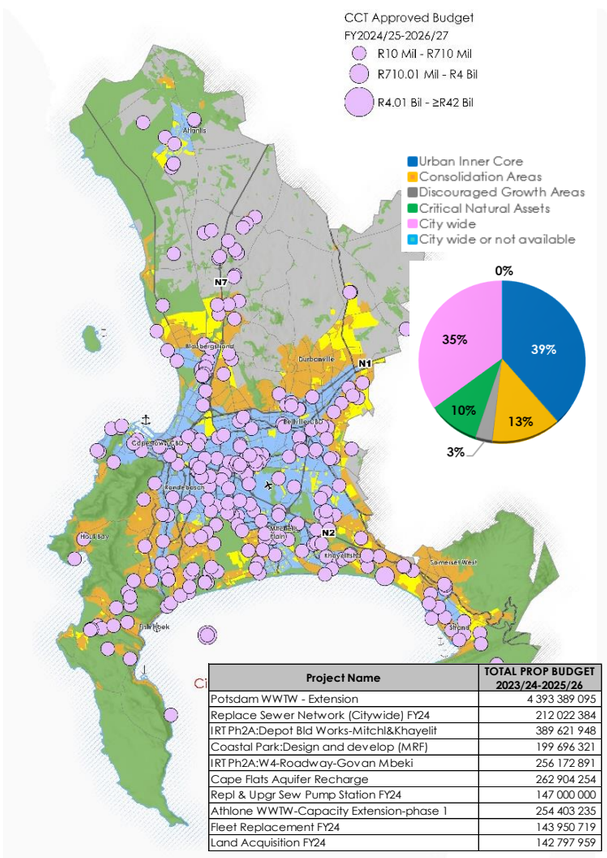
F.2

PUBLIC INVESTMENT: CITY & PROVINCIAL GOVERNMENT

CAPITAL BUDGET: CITY & PROVINCIAL PROJECTS

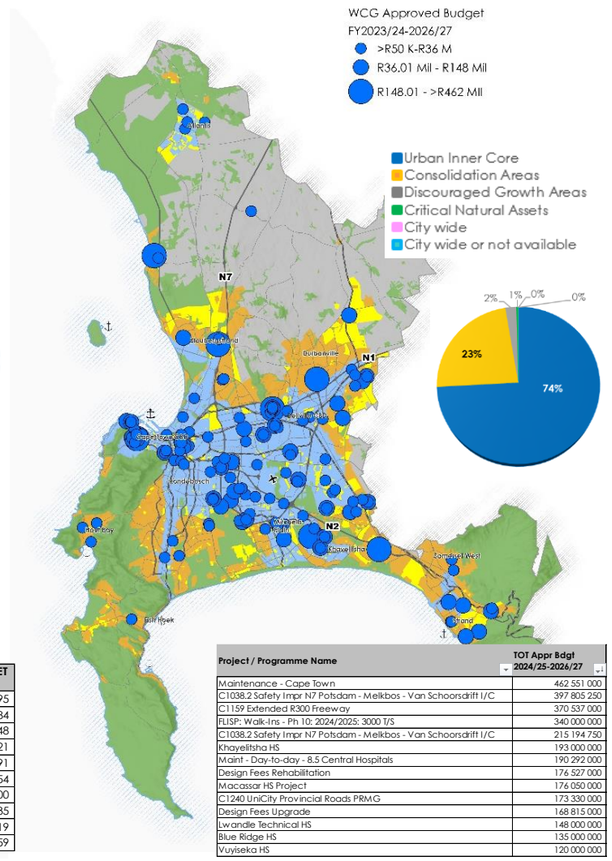
This indicator shows the focus of the approved three year capital project budgets by the City of Cape Town (CCT) and the Western Cape Government. It is reflected in the different investment targeted areas in the city, as consolidated in the MSDF (Municipal Spatial Development Framework). This includes 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.

Source: City of Cape Town (Apr 2024) and Western Cape Government Finance Dept (Mar 2024)



Project Name	TOTAL PROP BUDGET 2023/24-2025/26
Potsdam WWTW - Extension	4 393 389 095
Replace Sewer Network (Citywide) FY24	212 022 384
IRT Ph2A:Depot Bld Works-Mitchl&Khayelit	389 621 948
Coastal Park:Design and develop (MRF)	199 696 321
IRT Ph2A:W4-Roadway-Govan Mbeki	256 172 891
Cape Flats Aquifer Recharge	262 904 254
Repl & Upgr Sew Pump Station FY24	147 000 000
Athlone WWTW-Capacity Extension-phase 1	254 403 235
Fleet Replacement FY24	143 950 719
Land Acquisition FY24	142 797 959

Map F2-b: City capital budget 2024/25-2026/27



Project / Programme Name	TOT Appr Bdgt 2024/25-2026/27
Maintenance - Cape Town	462 551 000
C1038.2 Safety Impr N7 Potsdam - Melkbos - Van Schoorsdrift I/C	397 805 250
C1159 Extended R300 Freeway	370 537 000
FLISP: Walk-Ins - Ph 10: 2024/2025: 3000 T/S	340 000 000
C1038.2 Safety Impr N7 Potsdam - Melkbos - Van Schoorsdrift I/C	215 194 750
Khayelitsha HS	193 000 000
Maint - Day-to-day - 8.5 Central Hospitals	190 292 000
Design Fees Rehabilitation	176 527 000
Macassar HS Project	176 050 000
C1240 UniCity Provincial Roads PRMG	173 330 000
Design Fees Upgrade	168 815 000
Lwandle Technical HS	148 000 000
Blue Ridge HS	135 000 000
Vuyiseka HS	120 000 000

Map F2-c: Province capital budget 2024/25-2026/27

OVERALL TREND

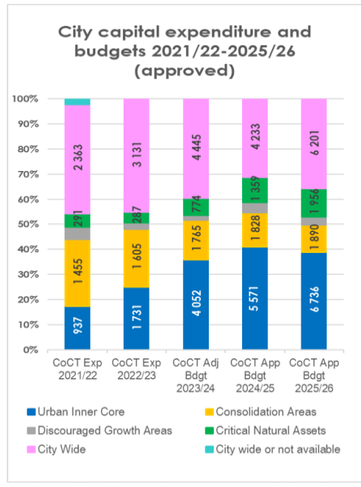
Anticipated and approved budgets for capital projects are an illustration of intended investment by role players such as the City as local authority and the Western Cape Government. These budgets reflect that government's intended capital project locations align with the spatially targeted areas of the 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 R17,3b in 2025/26, while the provincial budget remains on about R3,2b (see graph F2-e). Although the provincial budget earmarked for the City of Cape Town areas was between 59% (2021/22), it is decreasing to around 18% (2025/26) of the City's own budget within the context of the City's massive expansion in infrastructure (R6b-R17b). The proportion intended to be spent by the Province in the UIC and IGCAs, is more than the City's (graph F2-c vs graph F2-d, City 45%-50% vs Province 75%-95% of total annual budget per annum). Maps F2-b and F2-c depict the location of the City and provincial government's approved capital projects for the next three years.

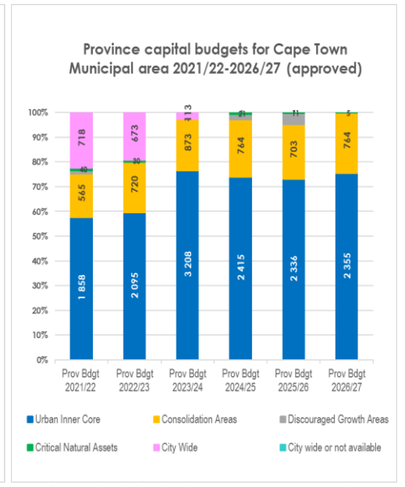
The City's capital budget contains a significantly larger number of projects than that of the Province. The City has double the number of large projects (>R10m in 2023/24-2025/26) than the Province. Also for projects <R10m (over the three year period), the City has around 10 times more than the Province.

Maps F2-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



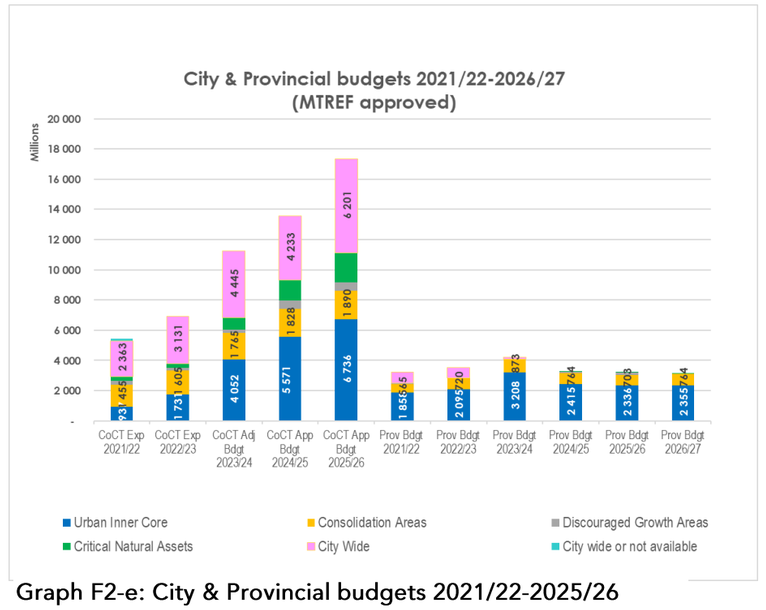
Graph F2-d: Province capital budgets 2021/22-2025/26

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 F2-c and F2-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 road construction (R300 and N7), human settlement projects such as the Macassar and Khayelitsha housing projects, as well as funding of houses under the FLISP programme. Each amounts to >R175m over the next three years. Around 40% 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.

GENERAL ANALYSIS

The maps show a high concentration of projects in locations such within the UIC, 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 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

CAPITAL BUDGET: CITY & PROVINCIAL PROJECTS

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 was about 1.5 times larger than the provincial budget to be spend in Cape Town (in 2021/22), but the outer years have increased from four to five times larger than the provincial budget for the municipal area.

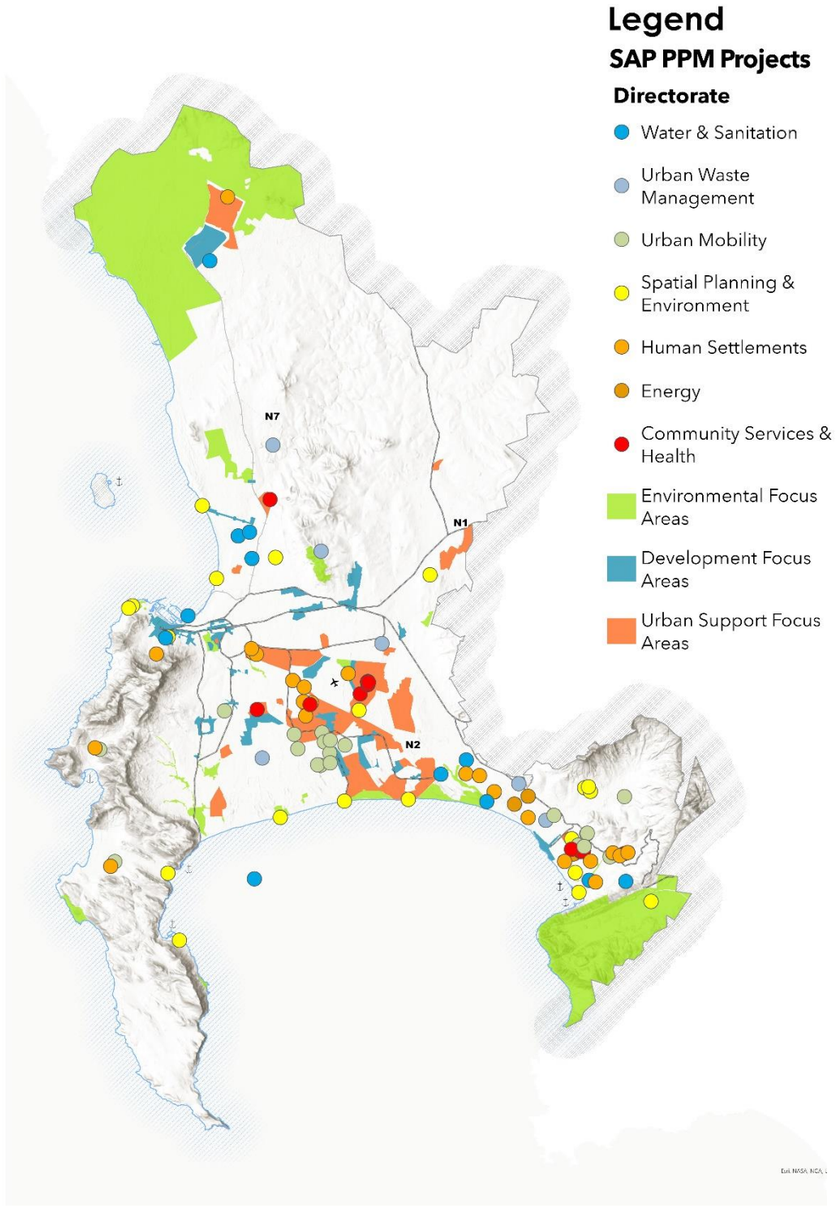
F.3

PUBLIC INVESTMENT

PROGRESS: URBAN AND RESTRUCTURING AND UPGRADING PROJECTS

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

Source: SAP PPM 2024; District Plan Vol. 3 2023



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

PLFA	Count	Percentage
DFA	14	7.5%
EFA	12	6.4%
USFA	33	17.6%
Outside of PLFA	83	44.4%
No Location	45	24.1%

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

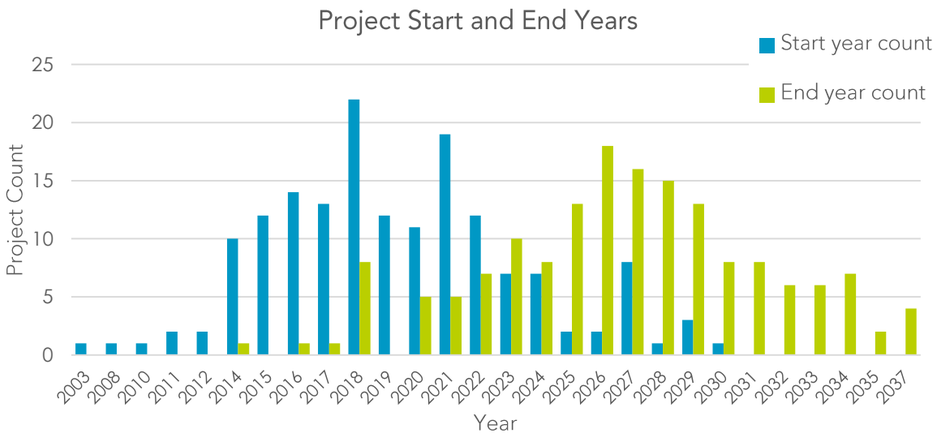
OVERVIEW

This panel monitors the progress of prioritised capital public investment projects identified for urban restructuring and upgrading in the 8 approved DSDFs 2023. In total 187 projects have been recommended for implementation by the various service delivery line department in the City. The projects reported on consist of those that align to 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 2003 to 2037.
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 23.5% of projects are within the project preparation phase (between scoping and conceptual design), 2.7% of projects are in screening, and 23.5% of projects are within the project execution phase (between detailed design and benefits review). In 2025, two new projects are anticipated to start, while 18 projects are expected to be completed. Spatial Planning and Environment, Urban Mobility, and Human Settlements 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, Human Settlements and Urban Mobility directorates. There are 41 Projects proposed by the DSDF do not have CPX numbers, thus have not been initiated.
Note: The alignment between the DSDF Priority projects and the Sector Plans was adjusted after the last publication. Tracking will proceed using this list going forward.



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

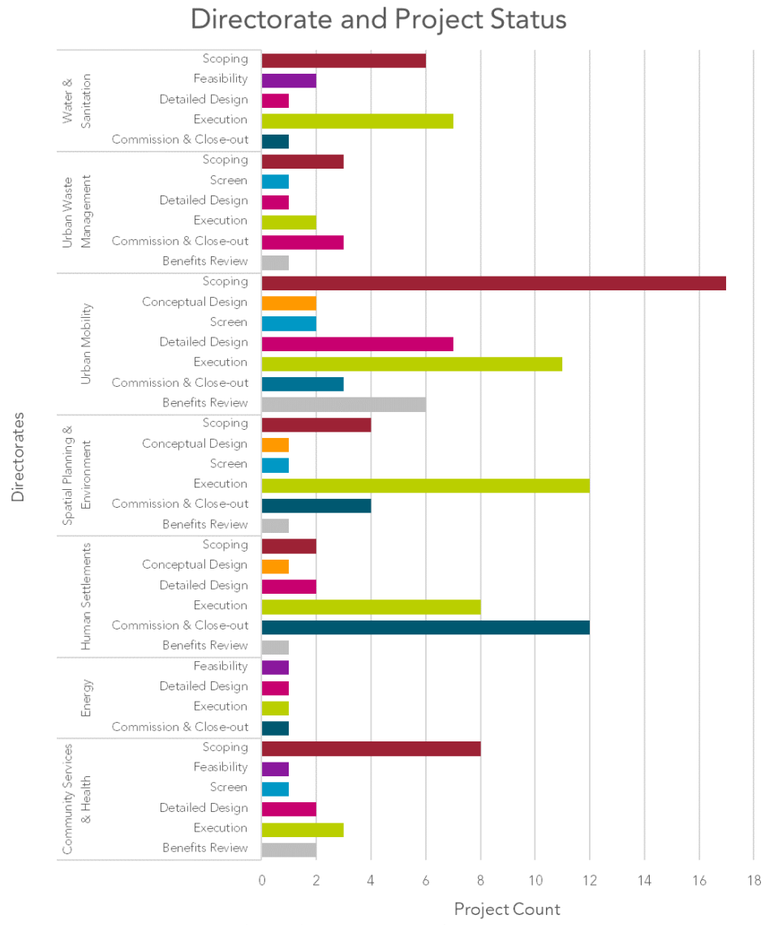


Figure F3-a: Bar chart showing capital investment prioritisation projects per sector and status

Current Status	Count	Percentage
Scoping	40	21.4 %
Feasibility	4	2.1%
Conceptual design	4	2.1%
Screen	5	2.7%
Detailed design	14	7.5%
Execution	44	23.5%
Commission & close-out	24	12.8%
Benefits review	12	6.4%
Missing information	40	21.4%

Table F3-b: Current status and project count

F.3

PROGRESS: URBAN AND RESTRUCTURING AND UPGRADING PROJECTS

KEY TAKE-AWAY TRENDS

- **47% of the identified urban restructuring and upgrading projects are expected to be completed by the end of 2024, while by 2028 80% of the identified projects will be complete.** 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 Human Settlements are the **directorates with the most priority projects,** reflecting aims to create a well-planned city with increased transport connectivity and access to opportunity.

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

PLFA	Count	Percentage
DFA	14	7.5%
EFA	12	6.4%
USFA	33	17.6%
Outside of PLFA	83	44.4%
No Location	45	24.1%

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

Figure F3-a: Bar chart showing capital investment prioritisation projects per sector and status

Current Status	Count	Percentage
Scoping	40	21.4 %
Feasibility	4	2.1%
Conceptual design	4	2.1%
Screen	5	2.7%
Detailed design	14	7.5%
Execution	44	23.5%
Commission & close-out	24	12.8%
Benefits review	12	6.4%
Missing information	40	21.4%

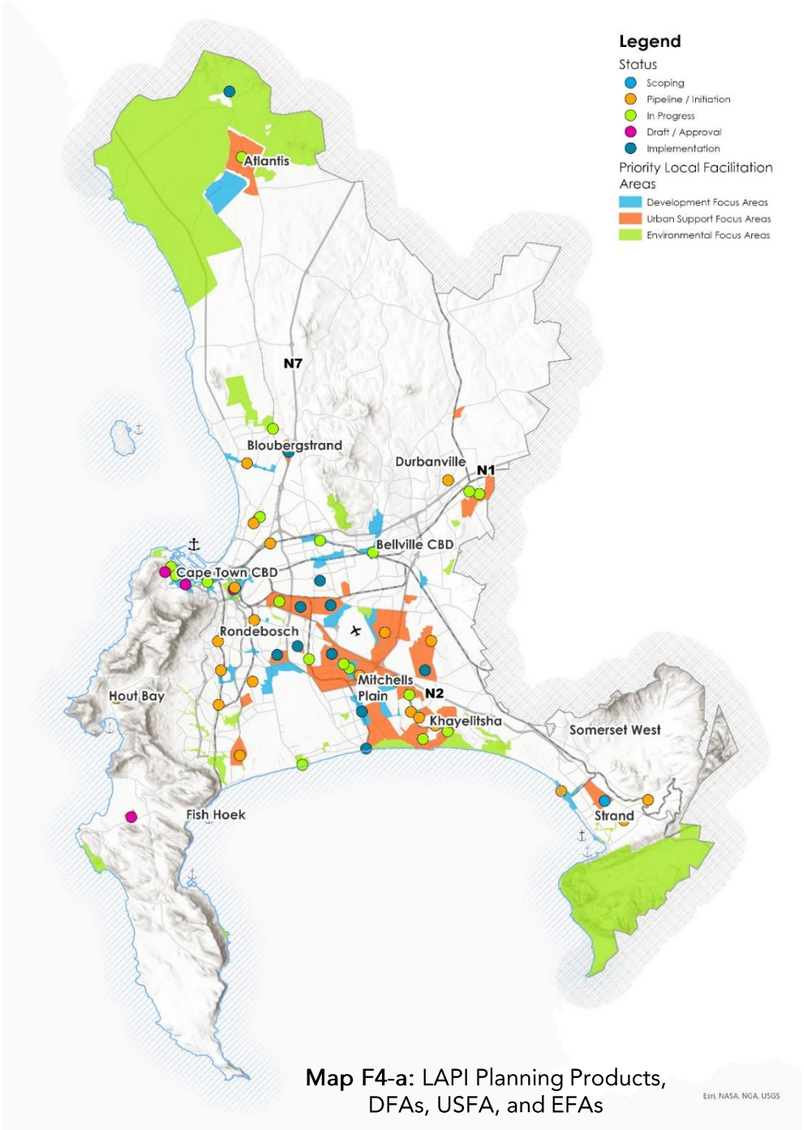
Table F3-b: Current status and project count

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. This panel only tracks LAPIs listed in the DSDF.

Source: SAP PPM; District Plan Vol. 3 2023



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

OVERVIEW

Local Area Planning Initiatives (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 have been identified and prioritised to be developed based on their location in PLFAs.

Figure F4-a depicts stages in the development process of LAPIs that have been prioritised. Projects are shown by district and project status. KMPGBD has the largest number of active projects; four projects in progress, five in the pipeline/initiation and one in scoping phase. Table Bay, Cape Flats and Blaauwberg each have three projects in progress and three in pipeline/initiation. The Tygerberg district has one project in progress and one in pipeline/initiation while the majority of Southern and Helderberg's projects are in the pipeline/initiation phase. Lastly, the Northern district has two projects in progress and one in pipeline/initiation phase. Across all districts, two projects are in draft/approval phase; the Woodstock Salt River and Masiphumelele LSDFs, and 17 projects have been approved/adopted and are now in implementation phase. LSDFs approved in the last year include Bo-Kaap, TRUP, District 6, Maitland, Bellville and Philippi Opportunity Area.

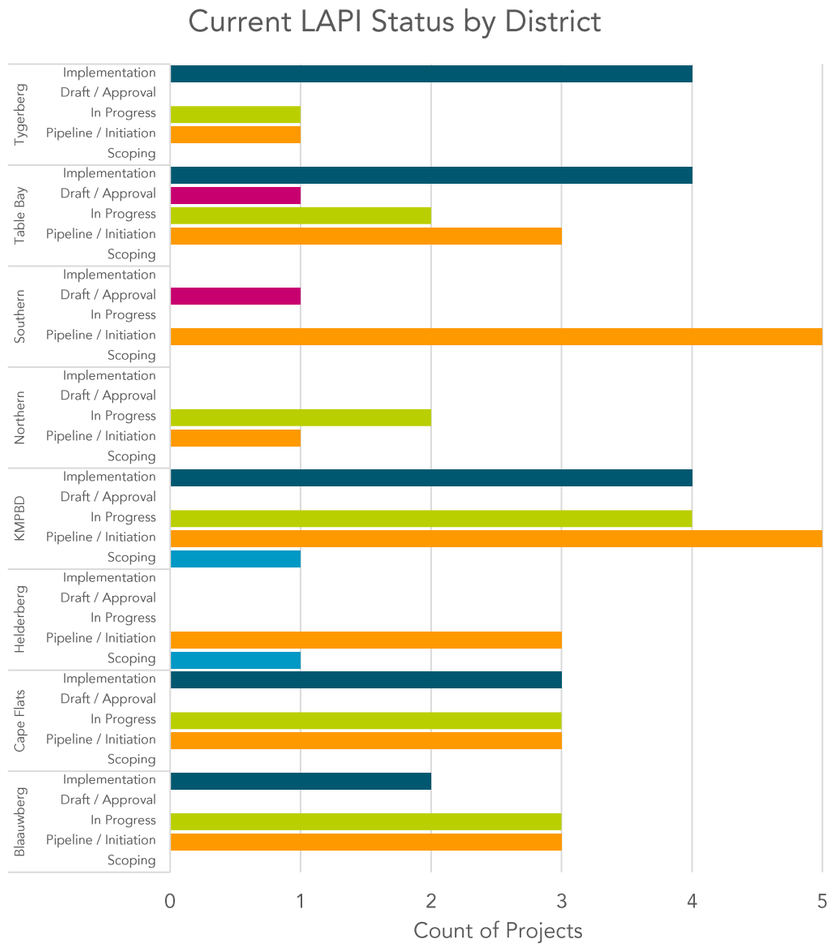
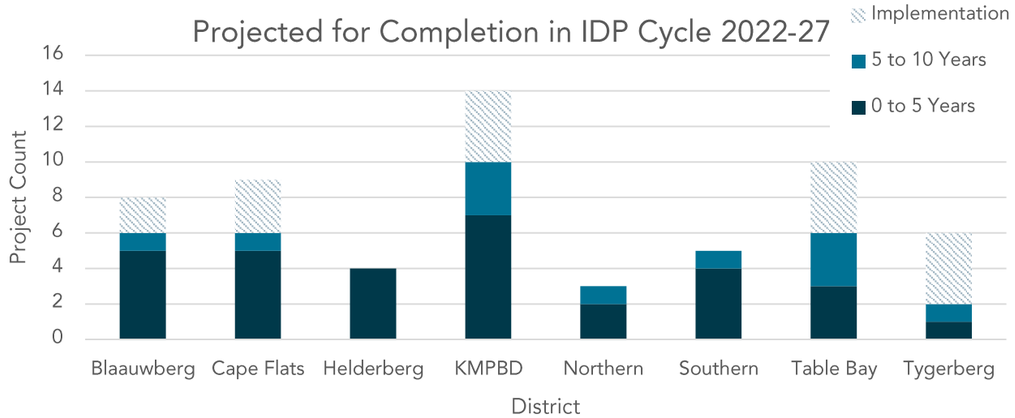


Figure F4-a: Bar chart showing the status of each project per district

Planning Product Status	Definition	23/24	24/25
Scoping	Determining whether LAPI is required / appropriate.	2	2
Pipeline / Initiation	LAPI planned to commence shortly. (Obtaining approvals, resources, budget)	22	24
In Progress	LAPI currently underway. *(Investigations, drafting, public engagement)*	20	15
Draft / Approval	LAPI Product is complete and ready for final approval / adoption.	4	2
Implementation	LAPI Product has been approved / adopted.	11	17

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



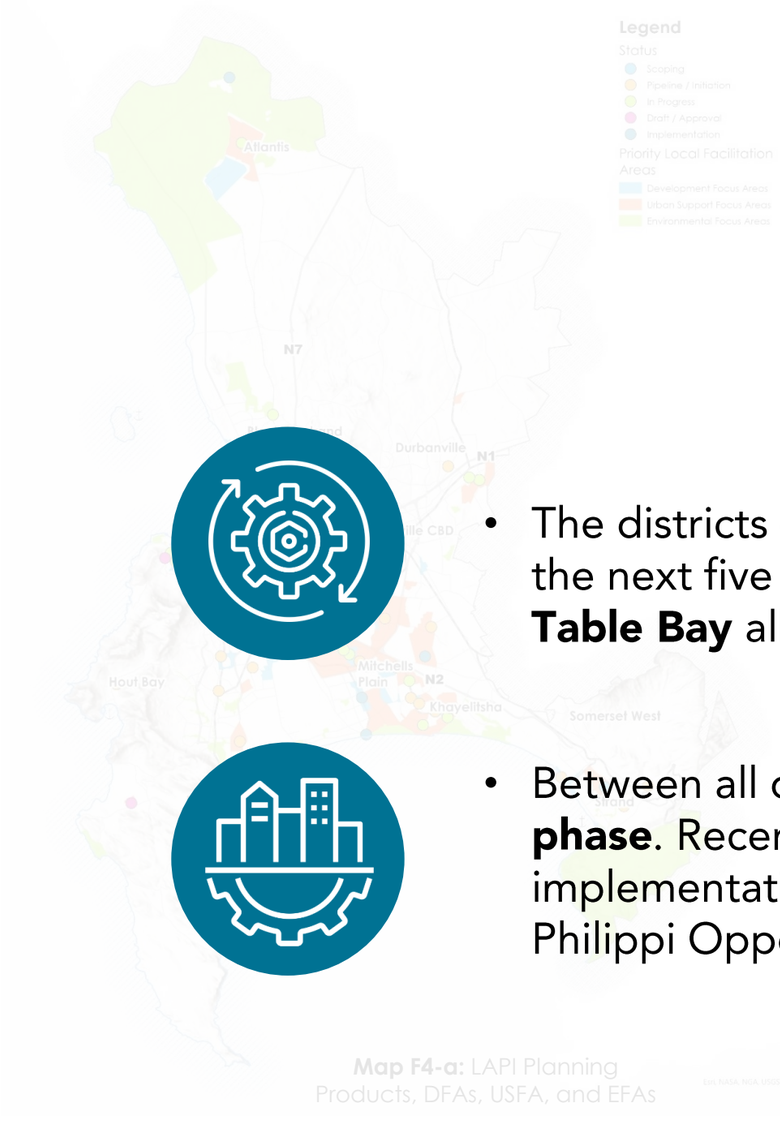
Graph F4-a: Projection of projects for completion in the IDP cycle ranging from 2022 to 2027

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

PROGRESS: PRIORITISED LAPIS

KEY TAKE-AWAY TRENDS



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

OVERVIEW

Local Area Planning Initiatives (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 have been identified and prioritised to be developed based on their location in PLFAs.

Figure F4-a depicts stages in the development process of LAPIs that have been prioritised. Projects are shown by number of active projects: four projects in progress, five in pipeline/initiation and one in scoping phase. Table Bay, Cape Flats and Blaauwberg each have three projects in progress and three in pipeline/initiation. The Tygerberg district has one project in progress and one in pipeline/initiation. The majority of Southern and Helderberg's projects are in the pipeline/initiation phase and one in pipeline/initiation phase. Across districts, two projects are in draft/approval phase, the Woodstock and Masiphumelele LSDFs, and 17 projects have been approved/adopted and are now in implementation phase. LSDFs approved in the last year include Bo-Kaap, TRUP, District 6, Maitland, Bellville and Philippi Opportunity Area.

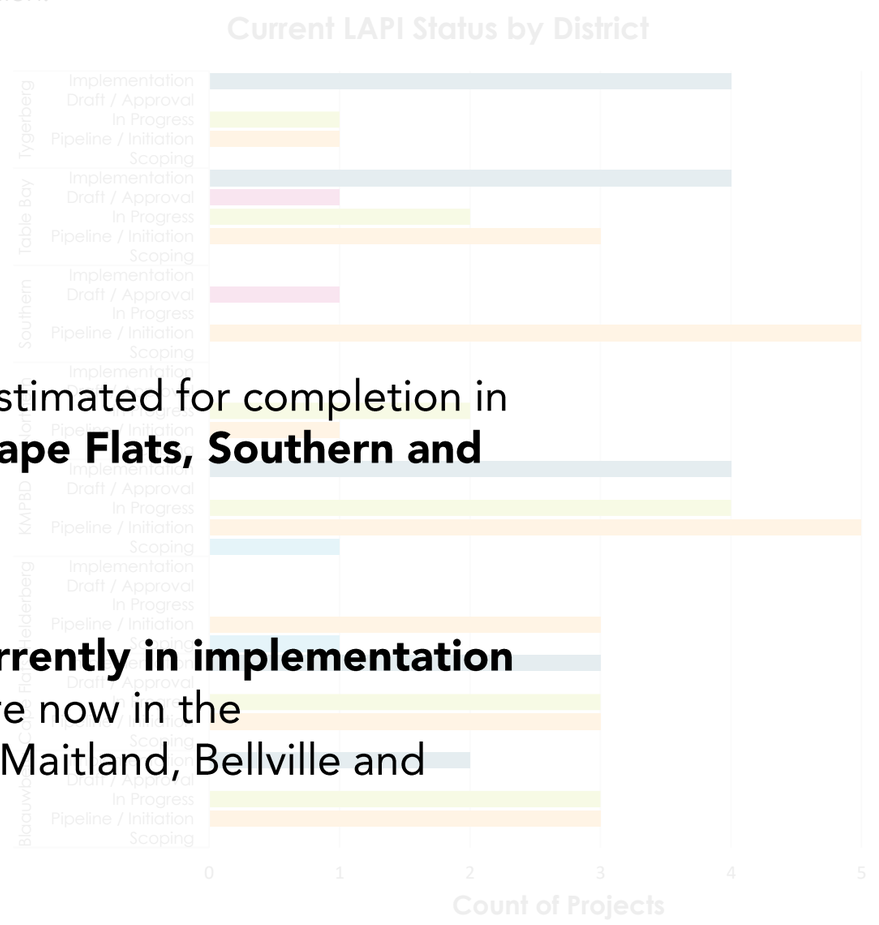


Figure F4-a: Bar chart showing the status of each project per district

- The districts of **KPMBD currently have the most LAPIs** estimated for completion in the next five years with **10 projects**, while **Blaauwberg, Cape Flats, Southern and Table Bay** all have **6 projects**, respectively.

- Between all districts, **28% of LAPIs are approved and currently in implementation phase**. Recently approved LSDF projects in 2024, which are now in the implementation phase, include Bo-Kaap, TRUP, District 6, Maitland, Bellville and Philippi Opportunity Area.

Planning Product Status	Definition	23/24	24/25
Scoping	Determining whether LAPI is required / appropriate.	2	2
Pipeline / Initiation	LAPI planned to commence shortly. (Obtaining approvals, resources, budget)	22	24
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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.

G : PROGRESS ON DEVELOPMENT MECHANISMS/ INCENTIVES

G.1

IMPLEMENTATION TRACKING

PROGRESS: IMPLEMENTATION OF DEVELOPMENT MECHANISMS/INCENTIVES

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.

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 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 seven 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**). These include Airport Industria, Atlantis, Flamingo, Kuils River, Mitchells Plain CBD, Ottery/Lansdowne and part of the Voortrekker Road Corridor.

Progress:

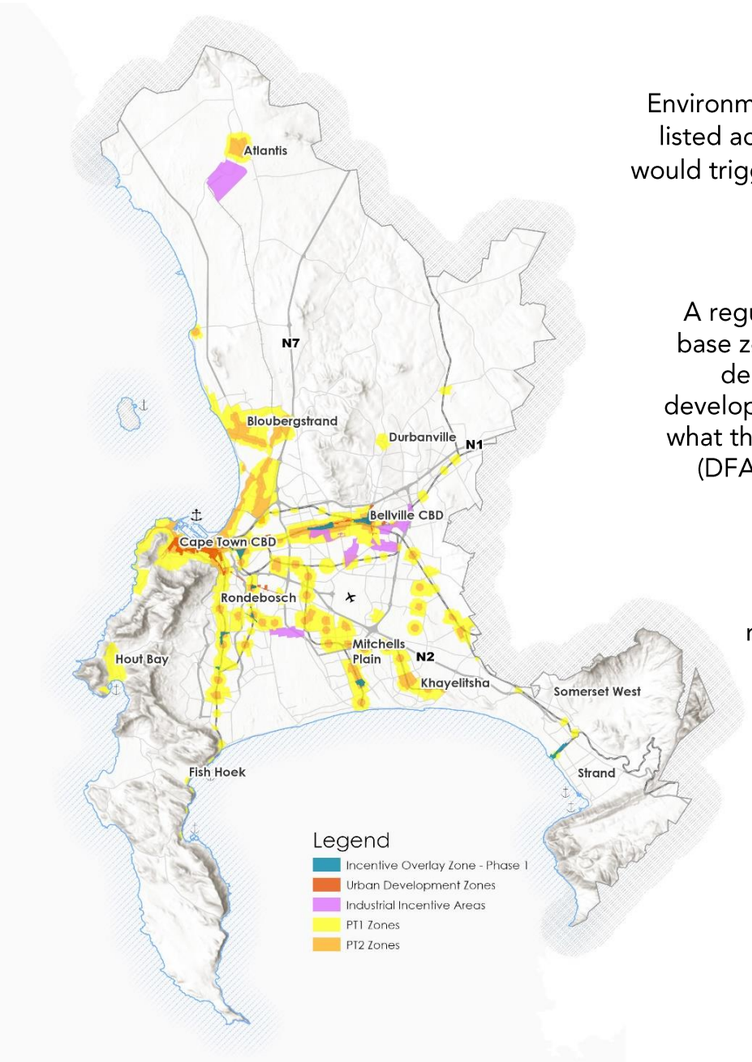
Active: Reports for proposed NHRA Exemption areas (x 7) submitted to Heritage Western Cape for approval by the provincial authority and the Minister of Cultural Affairs and Sport. All seven areas proposed have been gazetted for S34 and 38 exemptions as of 20 September 2024.

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 is approved and currently available for the six manufacturing areas depicted in map **G1-a**, and all tertiary sector land uses in the city.



Map G1-a: Approved and proposed development incentives

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 Zone (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 completed to determine viability of the incentive overlay zone. Five pilot areas currently out for public comments as part of the Municipal Planning By-law Review.

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**).

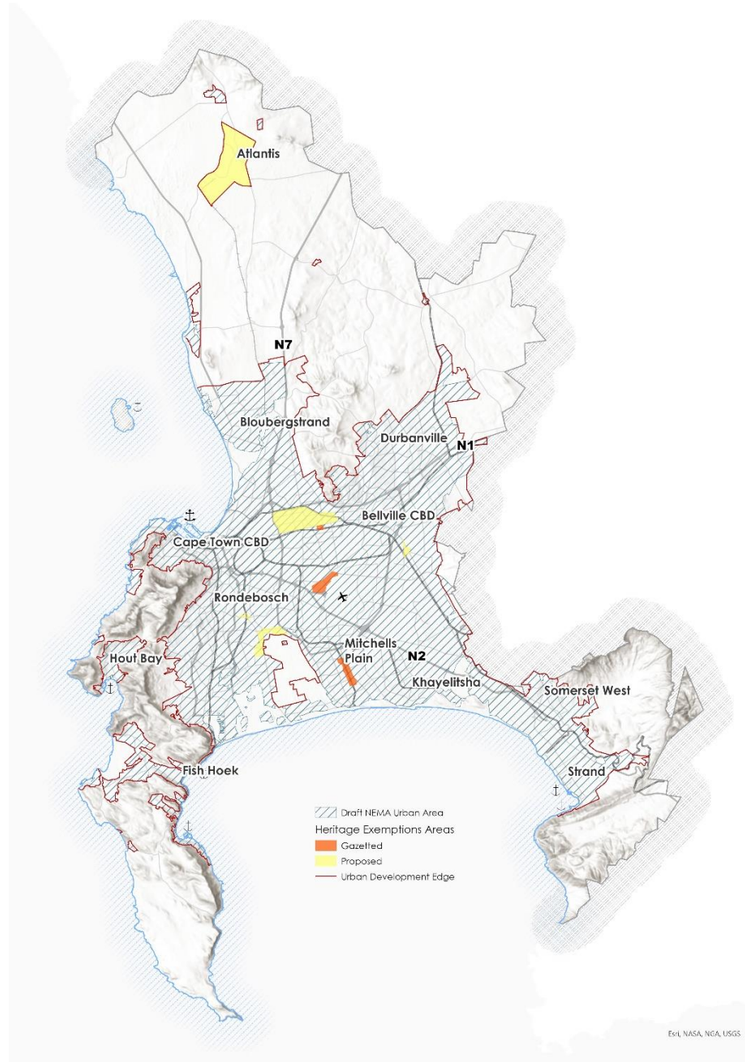
Progress:

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-b: Draft NEMA Urban areas extent and NHRA Exemptions

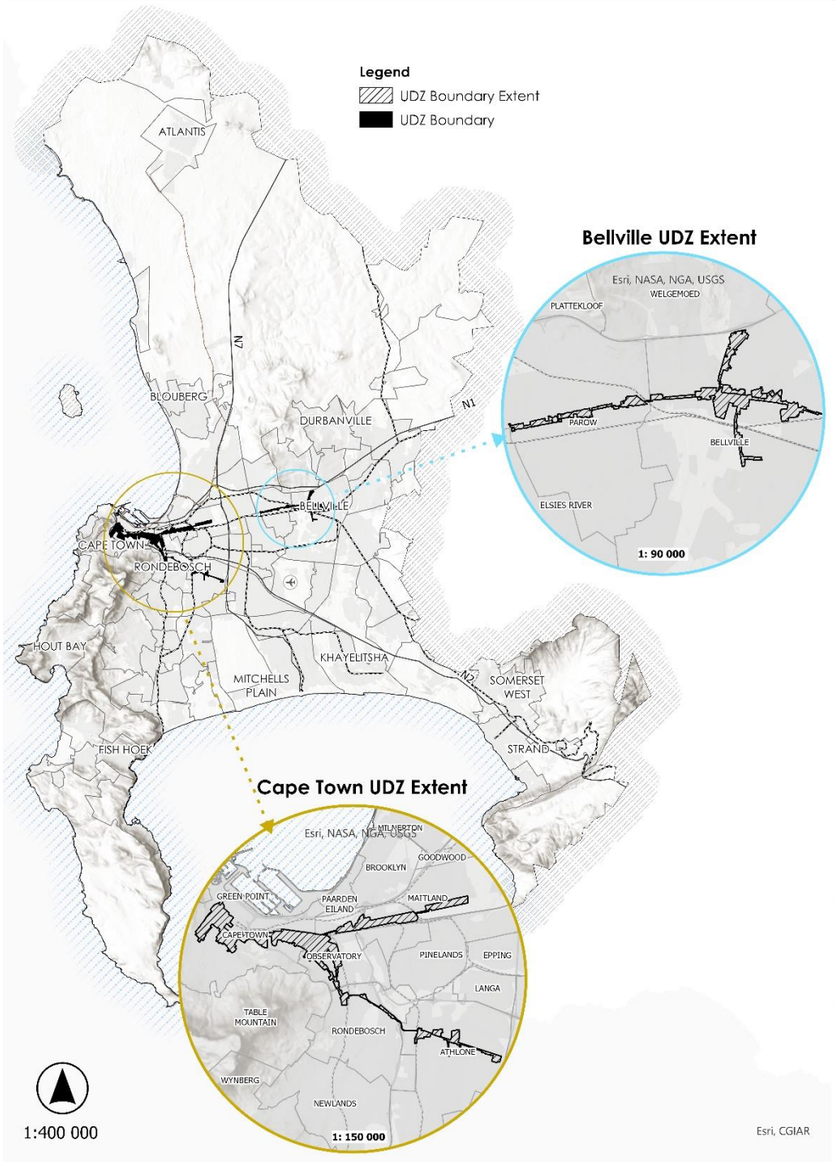
G.1a

ACTIVE INCENTIVES/MECHANISMS SPECIAL FEATURE

URBAN DEVELOPMENT ZONE: UPTAKE

This indicator displays the number of **Urban Development Zone (UDZ)** claims captured for the duration of the UDZ (2006 – 2024). Special Feature: A panel to spotlight certain noteworthy spatial trends or implementation tracking. The focus of the panel content will therefore change from year to year.

Source: Building Development Management, Development Management, City of Cape Town



Map G1b-a: Cape Town UDZ location and extents

SPATIAL TREND (DISTRIBUTION/PATTERNS)

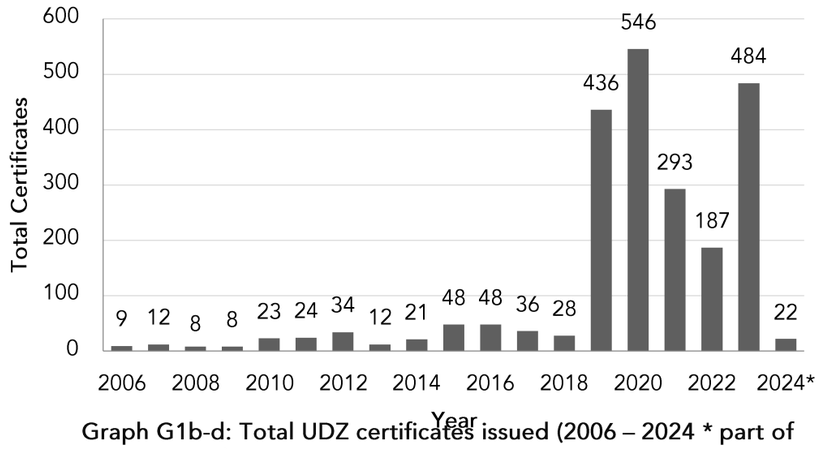
The Cape Town and surround component of the UDZ has had more activity than the Bellville and surrounds component. The other residential claims category displayed distinct dominance in the year 2019 and has maintained the same trajectory on 2020, however a decrease was experienced in 2021 and 2022 respectively. The Woodstock, Salt River and Observatory suburbs accommodated these residential claims the most, with Cape Town CBD, some parts of Maitland and Athlone also contributing to the residential claims allocations (Map G1b-c). Commercial UDZ claims have also had prevalent existence in the Cape Town CBD as well as an odd number in Maitland and Observatory.

OVERVIEW

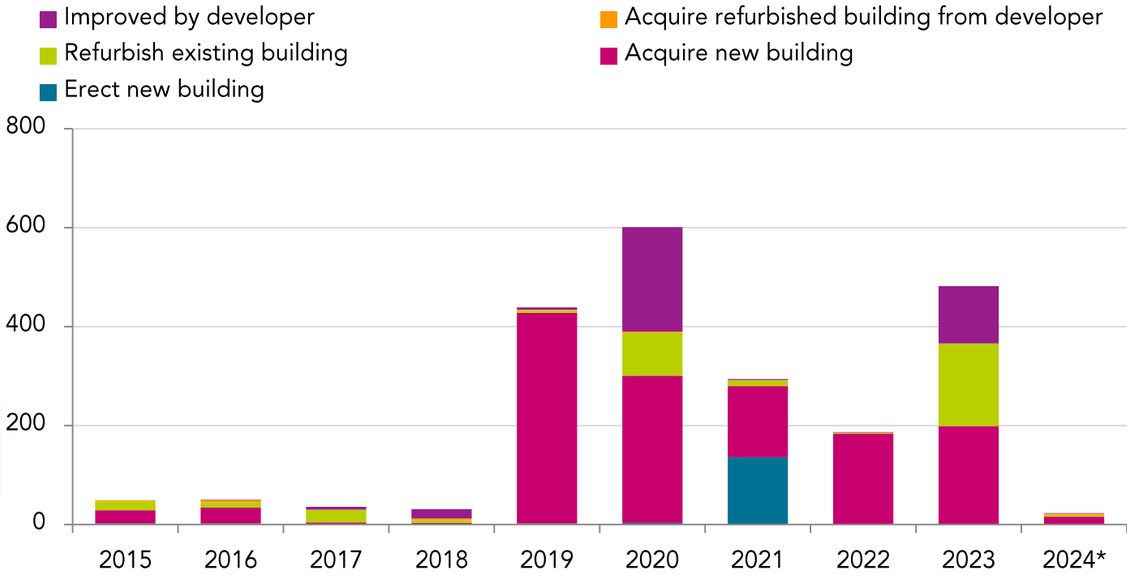
The Cape Town UDZ was gazetted on the 14th of October 2004 (Government Gazette number 26866) is a tax incentive scheme aimed at encouraging inner city renewal across South Africa by the South African Revenue Services (SARS). Any taxpaying, property owning, individual or entity may claim the tax benefits of the UDZ incentive. The UDZ incentive is currently operating on a two year extension which expires on 31 March 2025.

OVERALL TREND

The UDZ had a gradual start with low uptake in the first 7 years with a steady increase observed from 2015 onward. The significant peak in claims started from the year 2019, with subsequent years reaching total claims nearing the 200 mark (Graph G1b-d). The year 2020 saw the most number of claims submitted (a total of 546). The formative years of the UDZ (2006 - 2014) only had claims in the commercial and Other Residential land use categories. Claims for Low-cost housing and Industrial Land uses were added to the fold in 2015, however, claims submitted in this land use category have been minimal with other residential category dominating the claims (2015 – 2024). In as much as this residential category's claims have been dominant, the value thereof has seen a gradual decrease.

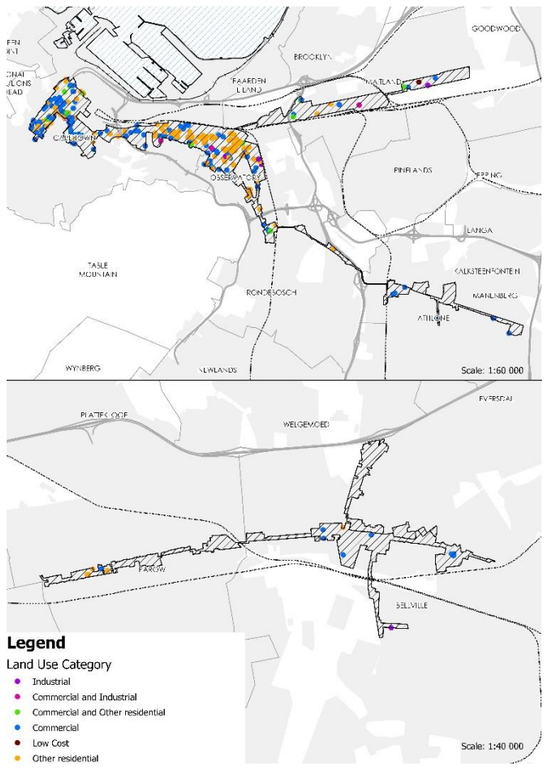


Graph G1b-d: Total UDZ certificates issued (2006 – 2024 * part of the year only)



Graph G1b-b: Number of UDZ certificates issued by Type, 2006 - 2024

The lack in claims within the Bellville areas could be attributed to the extent and delineation of this boundary. This trend was highlighted as part of the performance review of the UDZ which included motivation for the re-delineation of the UDZ boundary for Cape Town and its entirety. Research on property sales shows that there have been sales in this area (across the four land use categories of the UDZ. Claims in the low cost housing category is almost non-existent, considering that there is no affordable housing being developed within these boundaries places a constraint on this claim category, bearing in mind the claim limit of R350 000 associated with this land use category.



Map G1b-c: Spatial distribution of claims by Land Use Category (2006 – 2024)

G.1

IMPLEMENTATION TRACKING

PROGRESS: IMPLEMENTATION OF DEVELOPMENT MECHANISMS/INCENTIVES

- **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). The NHRA Exemptions S34 and 38 exemptions were approved and gazetted in September 2024.

- Mechanisms which are **still in progress** include NEMA Urban Areas (alignment with Urban Development Edge is required), and Incentive Overlay Zones (currently out for public participation as part of the MPBL Review).

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	**Comprehensive Report**	**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, 2018 and 2022
Property Sales Transactions	CCT – Valuation Department	2009 – 2022
Bio-Net	CCT – Environmental Management	2009 – 2019
Environmental Land Acquisitions	CCT – Environmental Management	2012 – 2024
Agricultural Areas of Significance	WCG – Department of Agriculture	2012 – 2023
EIA Applications	WCG – DEADP	2018 (June) – 2024 (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 – 2023/24
Capital Projects (SAP PPM)	CCT - Corporate Project, Programme and Portfolio Management	2017/18 - 2023/24 as of April 2024 for CoCT and Mar 2024 for WCG

ANNEXURE A: ECONOMIC AND INDUSTRIAL AREA PROFILES

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

ACKNOWLEDGEMENTS

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Valuations, Development Management & Policy and Strategy

DISCLAIMER:
The information contained herein is provided for general information only which 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.

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BRACKENFELL INDUSTRIAL ECONOMIC AREA PROFILE

TREND ANALYSIS 2012-2022





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June 2024

Making progress possible. Together.

POLICY & REGULATORY CONTEXT

For the past decade the global and national economic context has required regional economies to prioritise its investment decisions in space for greater efficiency. The Economic Areas Management Programme (ECAMP) as it was introduced has therefore been considered a valuable economic data tool to providing valuable insights into the performance of the space economy at an area-specific level.

This update of ECAMP is further aligned to the Urban Planning & Design Department's business strategy to leverage spatial intelligence to unlock value within Cape Town's space economy by:

a) Tracking the performance and implementation of its spatial development framework policies
b) Developing the evidence base to inform and adjust said spatial policy
c) Supporting spatially targeted investment decision-making
d) Providing a spatial lens of economic data within the Cape Town context

The update of ECAMP is supported by the following strategic objectives and programmes:



INTEGRATED DEVELOPMENT PLAN 2022-2027

- Objective 1 (Increased jobs and investment in the Cape Town Economy): Targeted urban development programme
- Objective 15 (A more spatially integrated and inclusive city): Spatial strategy monitoring and evaluation project

INCLUSIVE ECONOMIC GROWTH STRATEGY (2021)

- Applying an economic lens to policy-making by integrating sustainable analysis into City Decision Making in alignment with the MSDF.
- The primary and most immediate scope of work must centre around economic recovery. To this end, implementation of this Strategy will be in the form of a three-phase recovery approach.

MUNICIPAL SPATIAL DEVELOPMENT FRAMEWORK (MSDF, 2023) POLICY & STRATEGY IMPLEMENTATION

- Table 5.1: Spatial strategy 1: Substrategies and policy guidelines (Policy 2, 4 and 5)
- Table A2: Spatial strategy 1: Policy guidelines, strategic and implementation intent (Policy 4,2 and 4,3)

DISTRICT SPATIAL DEVELOPMENT FRAMEWORK (DSDF, 2023): SUB DISTRICT GUIDANCE

- Northern DSDF - Subdistrict 3: Fisantekraal, Joostenbergvlakte, Bloekombos and Scottsdene Area:
  - Typologies and district elements – Development guidelines (page 69)
  - Policy statements (page 109)
  - New Development Areas (page 109 - 111)
  - Consolidated subdistrict SDF (Figure 20: Subdistrict 3: Fisantekraal, Joostenbergvlakte, Bloekombos and Scottsdene area)

CONCEPTUAL FRAMEWORK

Intended users
This profile provides a cohesive narrative to determine key trends across a number of data entry points to help inform decision making. This profile also aims to help guide investment in cases where data is not readily available to the public.

Conceptual Framework
The reporting of updated time series microeconomic analysis on Cape Town's economic areas is informed by a conceptual framework, which aims to create spatial intelligence on *supply & demand factors according to the* 5 themes which has been identified. The 5 themes allows for an integrated narrative across area-based economic trends. The trends being reported throughout this profile is used to classify and assess the overall performance of Cape Town's economic areas.

Data preparation, sources, assumptions and limitations
The indicators reported on in this profile feed off a number of automated data processes to add intelligence at a land parcel level which is then aggregated into economic areas. This profile draws across various datasets between 2012 and 2022 such as the general valuation roll, market reports, building plans, land use applications, property sales and SARS data. While many of the respective datasets are continuously refined overtime, this profile will be updated as and when new data is available.

Contact details
Should you wish to make contact, please direct your feedback to the City of Cape Town's Metropolitan Spatial Planning and Growth Management branch via Future.CapeTown@capetown.gov.za

MACRO-ECONOMIC REPORTS AND INDICATORS
The purpose of this profile is not to provide a comprehensive summary of macro-economic factors determining the basis for which industries invest in based on the economic condition. Refer to reports to read more about macro-economic indicators reported for Cape Town:

- Economic Performance Indicators for Cape Town
- Regional Market Analysis and Intelligence 2023/24
- Provincial Economic Review and Outlook (PERO)
- Municipal Economic Review and Outlook (MERO)

MICRO-ECONOMIC DEMAND & SUPPLY FACTORS
This profile considers an array of micro-economic indicators in providing trends on *Supply and Demand* unique to an economic area. These indicators include:

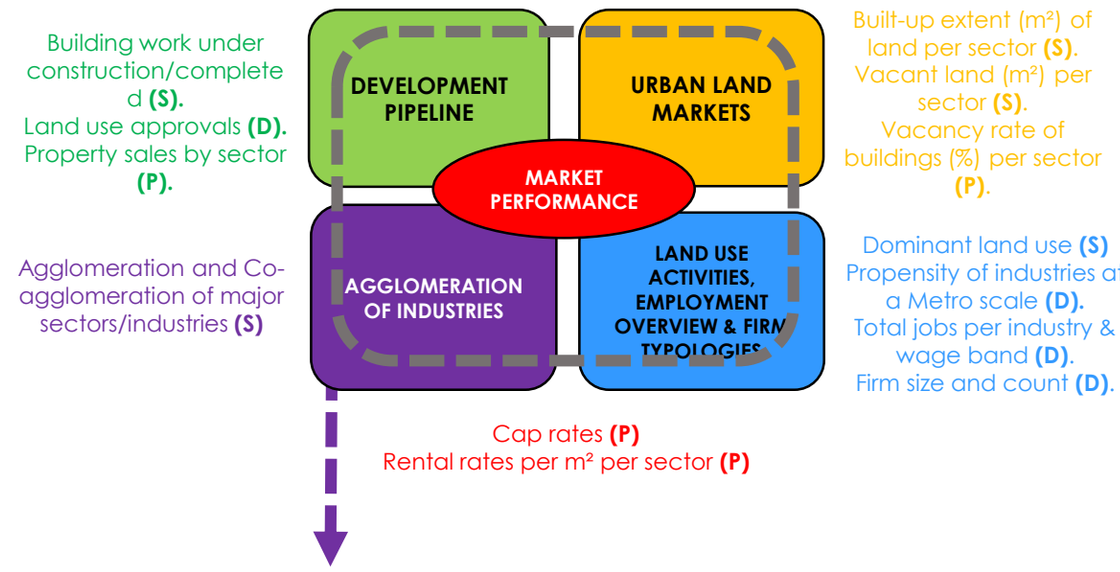
- Property sales per land use sector
- Building work completed
- Types of land use applications approved
- Vacant land per land use sector
- Built-up land and take up rate per land use sector
- Dominant land uses present in an area
- Building vacancy rate overtime
- Capitalisation rate over time
- Rental rate p/m² by land use sector
- Jobs per industry

WHY

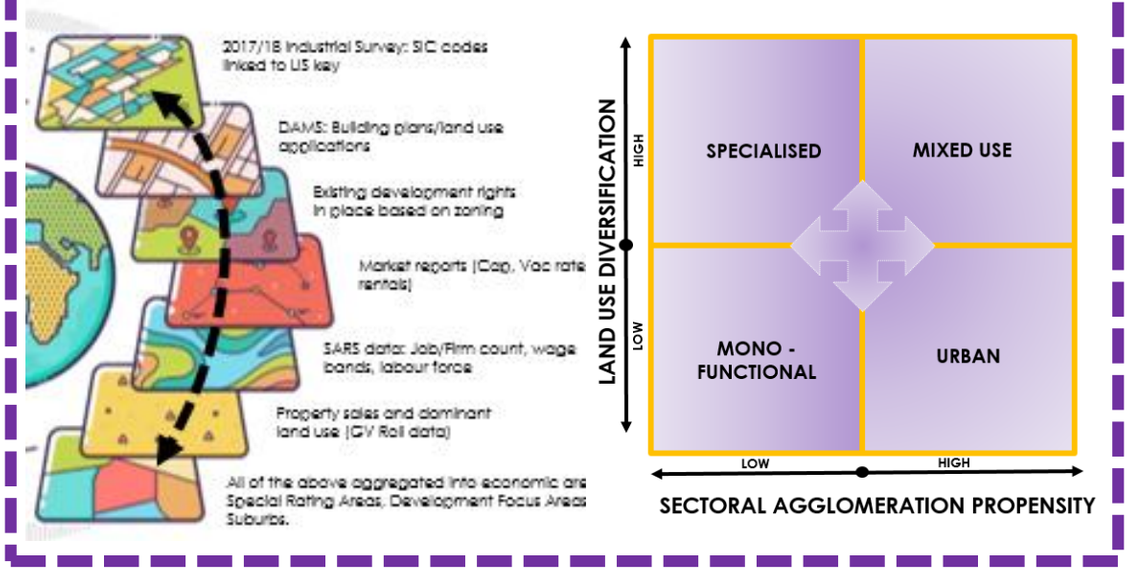
VALUE PROPOSITION	CHALLENGES /OBJECTIVES TO ADDRESS	AREAS OF APPLICATION
Promoting economic infrastructure in support of economic growth and job creation. Supports internal and external collaboration around data and spatial intelligence. Supports the spatially differentiated investment rationale of the MSDF and DSDFs.	**Urban Growth Planning (Non-res growth estimates)**: Determine where to accommodate ne non-res growth. **Spatial intelligence**: Location-based supply and demand factors. **Enhanced spatial policy**: Evidence-based analysis on Cape Town's space economy informing a policy framework.	Land Use Model 2050 update. Replacement of the static and dated ECAMP with an updated, automated economic analysis tool. Support: Business retention & expansion initiatives. Data foundation behind MSDF Policy Statement 4.

WHAT

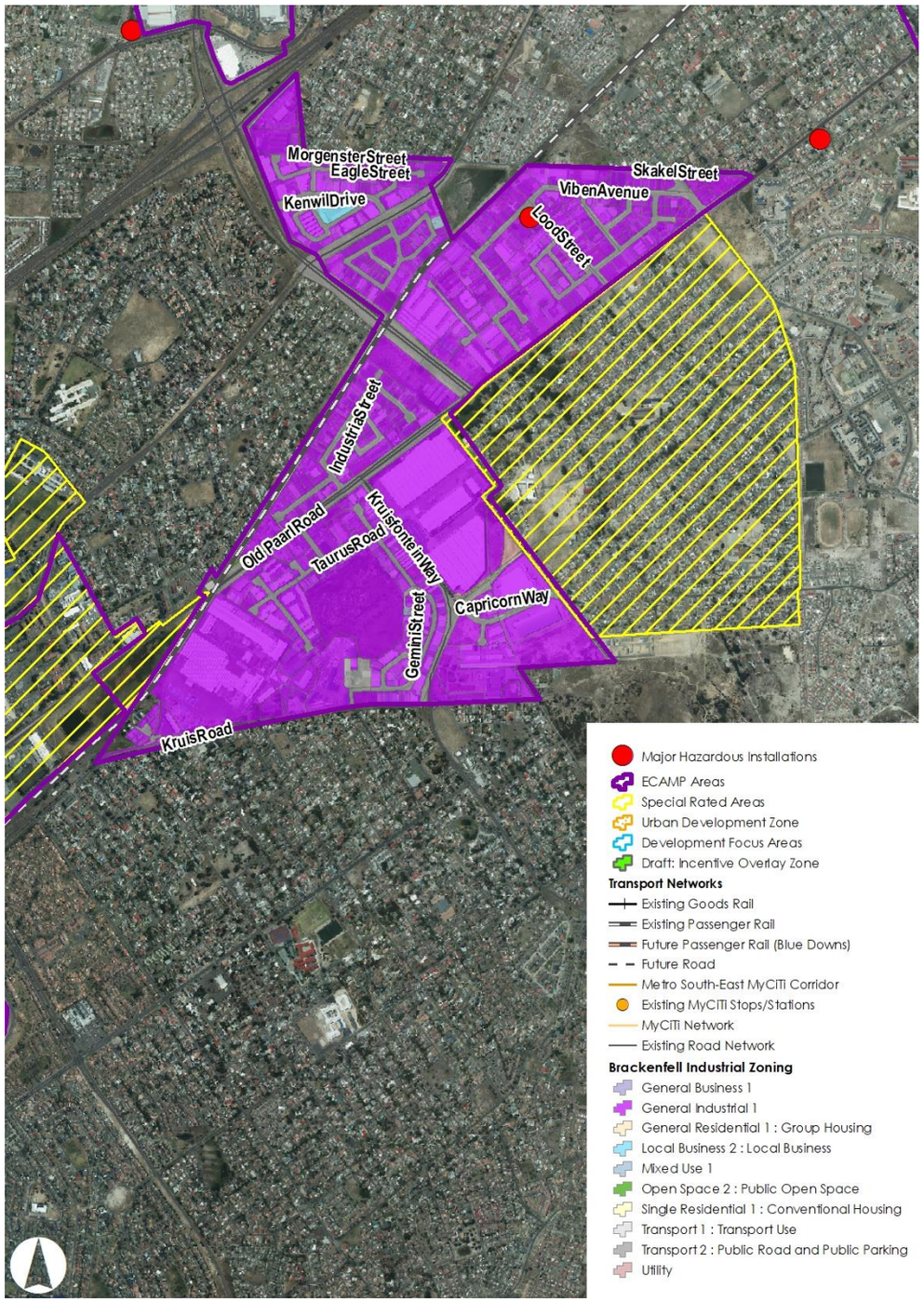
Supply, Demand & Performance (S,D & P)



HOW



INTRODUCTION



BRACKENFELL INDUSTRIAL

Location

- The area is approximately 27km north-east of Cape Town's central business district and Port of Cape Town. Furthermore, located 15km from Cape Town International Airport to allow for efficient import and export of goods.
- Situated near the N1 and R300 highway, providing easy across Cape Town and connecting to areas beyond Cape Town.
- The area is mainly serviced by rail, taxis and GABS.
- Access to a skilled workforce from surrounding areas, includes Kuilsriver, Blue Downs and Blackheath.

Zoning and Land Use

- The area is predominantly zoned for industrial and commercial use allowing for manufacturing, warehousing, and distribution activities.
- The area is currently accommodated by light and heavy industrial uses including warehousing.
- Types of land uses include warehousing, sales, manufacturing, repairs and office accommodation.

Plot Sizes

- The average plot sizes in the area mostly vary between 1 000 – 2 500m² with a limited amount of plots ranging between 5 000 – 10 000m².

Spatial planning mechanisms

- Areas adjacent to the area is serviced by a Central Improvement District

Key highlights of the area include:

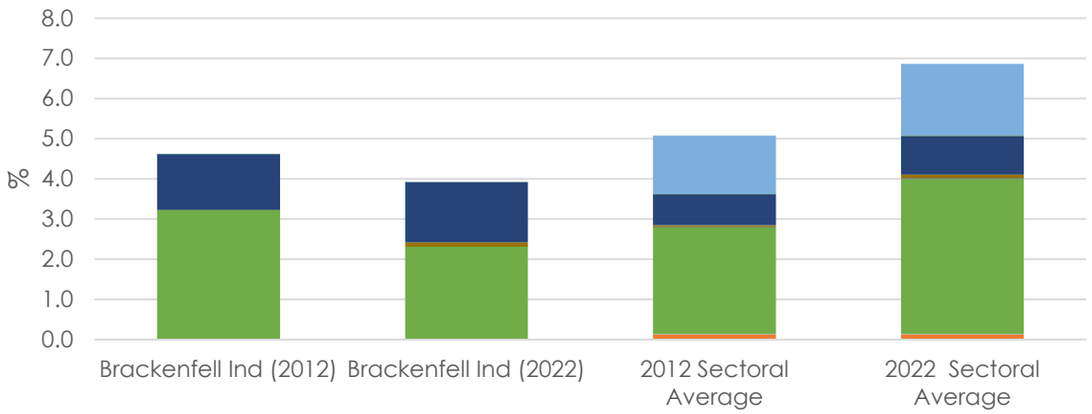
- The area started to establish itself from the 1960s which has developed into an industrial economic area.
- Okavango Park has been the latest significant extension to the area which includes sales type of businesses.
- More recently Shoprite Distribution Centre has established itself within the area.

LAND USE ACTIVITIES

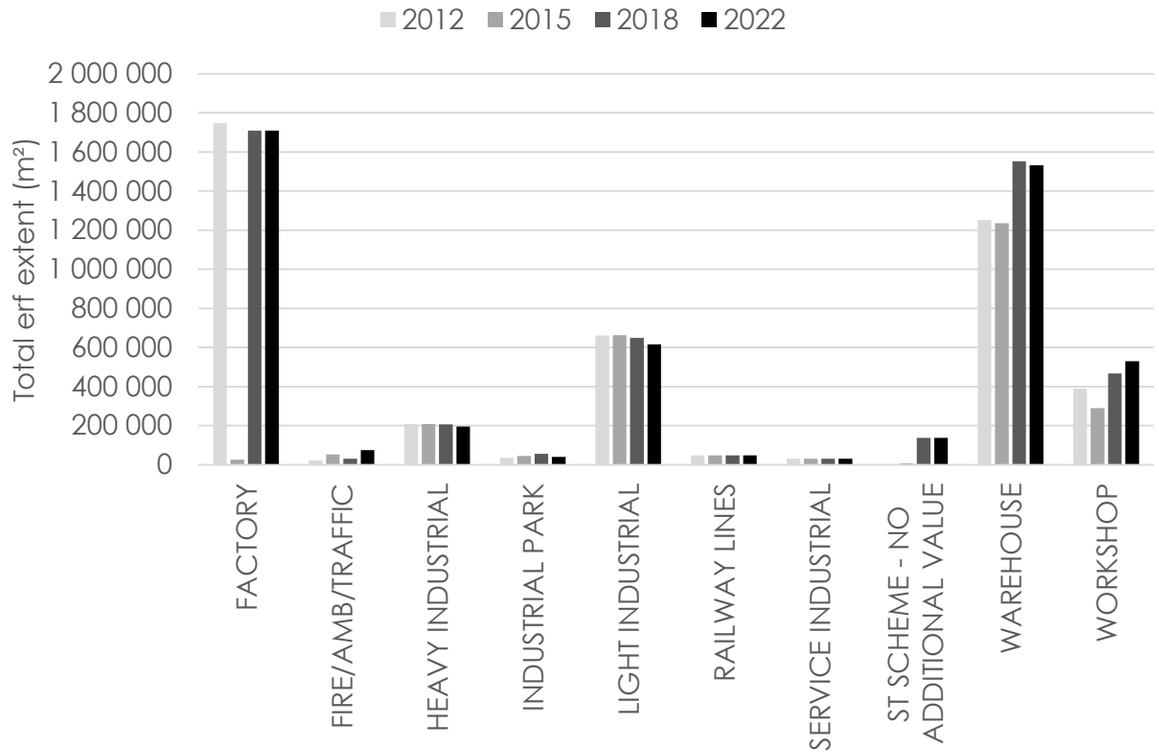
Recent analysis entailed the conversion of land use codes contained in the GV Roll into SIC codes in order to determine propensity of industries operating in areas of similar character.

- Between 2012 and 2022, Brackenfell industrial was mainly characterised by a greater propensity for manufacturing and transport & storage as reflected in the **Nodal Typology**. The nodal typology highlights industries with the most floor area (m²) operating within an economic area.
- The **Metroscale Benchmarking** positions Brackenfell industrial to being a contributor of manufacturing and transport & storage which is higher than that of the sectoral average when measured against other industrial areas across Cape Town.
- The GV Roll supplements the findings of the SIC level data by illustrating the **dominant land use** overtime based on the cumulative extent (m²) of floor area for factories, light industrial, warehousing and workshops.

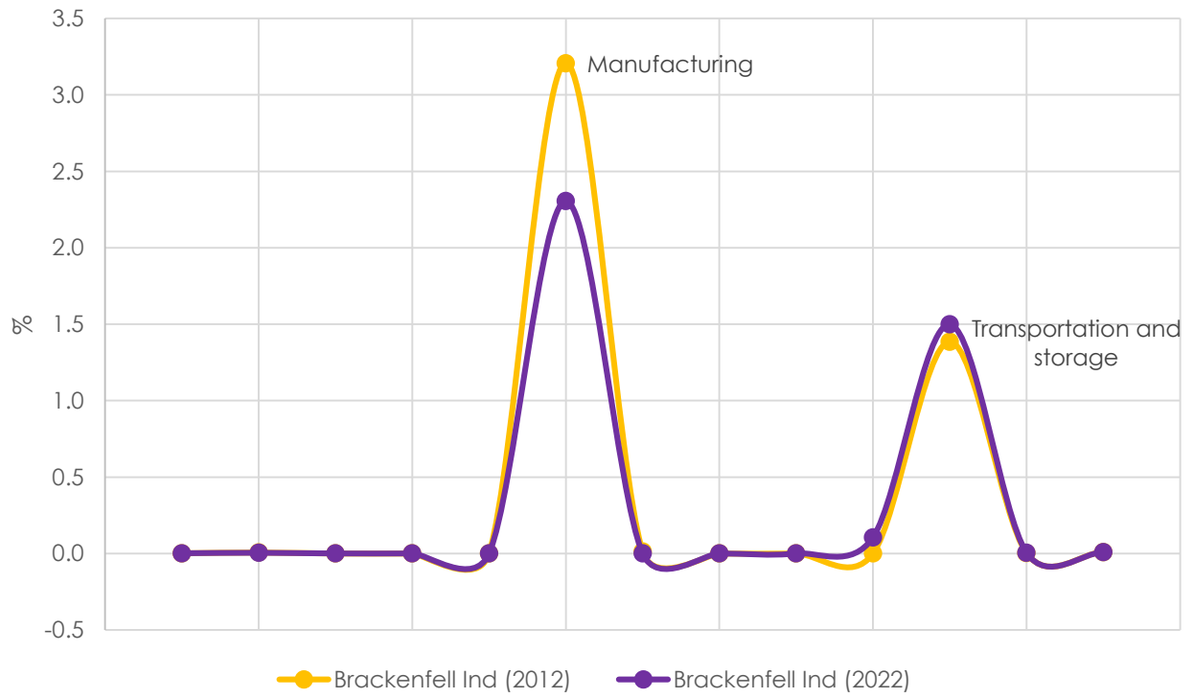
METROSCALE BENCHMARK



CUMULATIVE EXTENT OF THE MOST DOMINANT LAND USES BETWEEN 2012 AND 2022



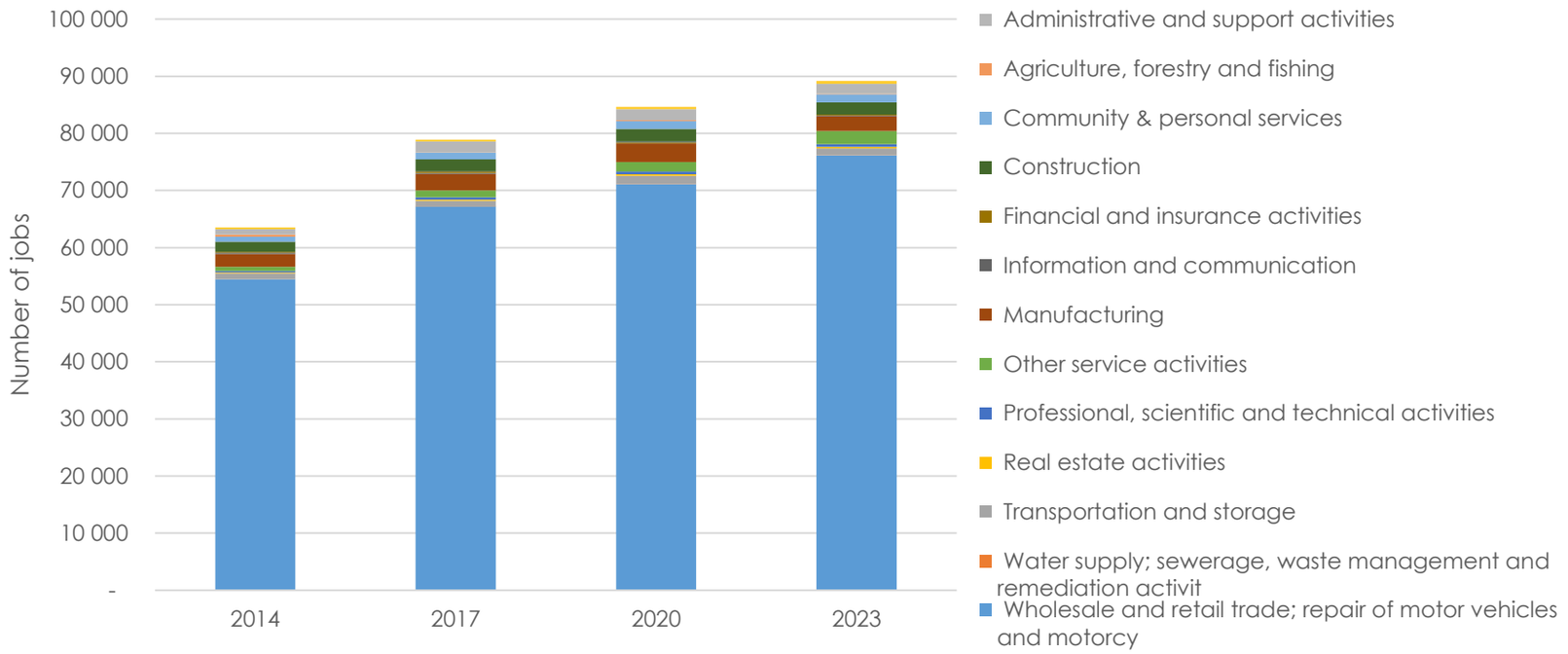
NODAL TYPOLOGY FOR 2012 AND 2022 (*Mixed Industrial*)



Source: 2012 – 2022 land use codes converted to SIC codes (May 2024 analysis)

EMPLOYMENT OVERVIEW & FIRM TYPOLOGIES

FULL TIME EMPLOYMENT BY INDUSTRY

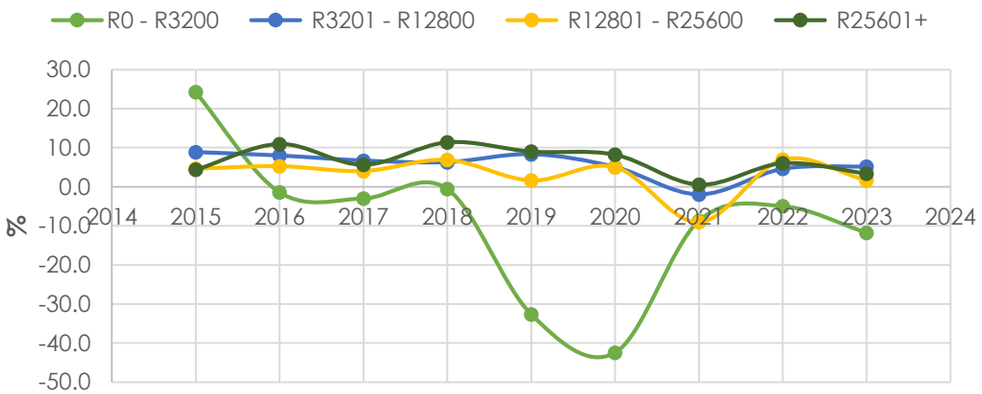


Jobs/Firms: The number of job opportunities surrounding Brackenfell industrial ranged around 60 000 to 90 000 between 2014 and 2023. A significant increase in jobs has been observed between 2014 and 2020 despite the effects of the Covid pandemic. Overtime, majority of the jobs have been positioned within wholesale industry and dwarfs the other sectors.

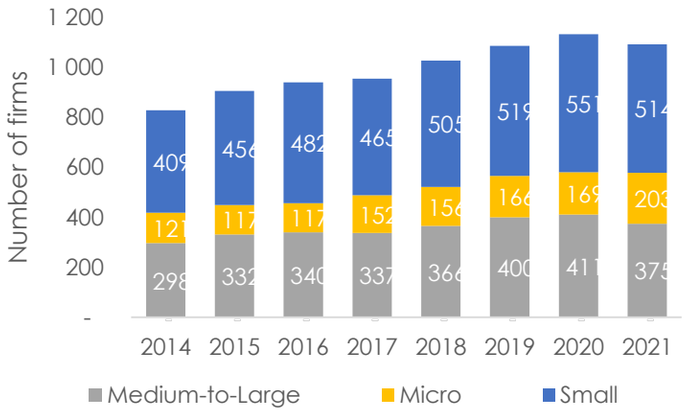
The total number of firms experienced an overall increase from 800 to 1 000 firms. While 'small' firm sizes are most dominant, there has also been a significant presence of 'medium-to-large' firms and also includes 'micro' firms. All 3 has increase significantly over the period.

Income bands: The income bands provide an indication of the skill level that is being employed. The data suggests that a larger proportion of employees earns up to R12 800 per month with a limited amount of employees earning above R12 800.

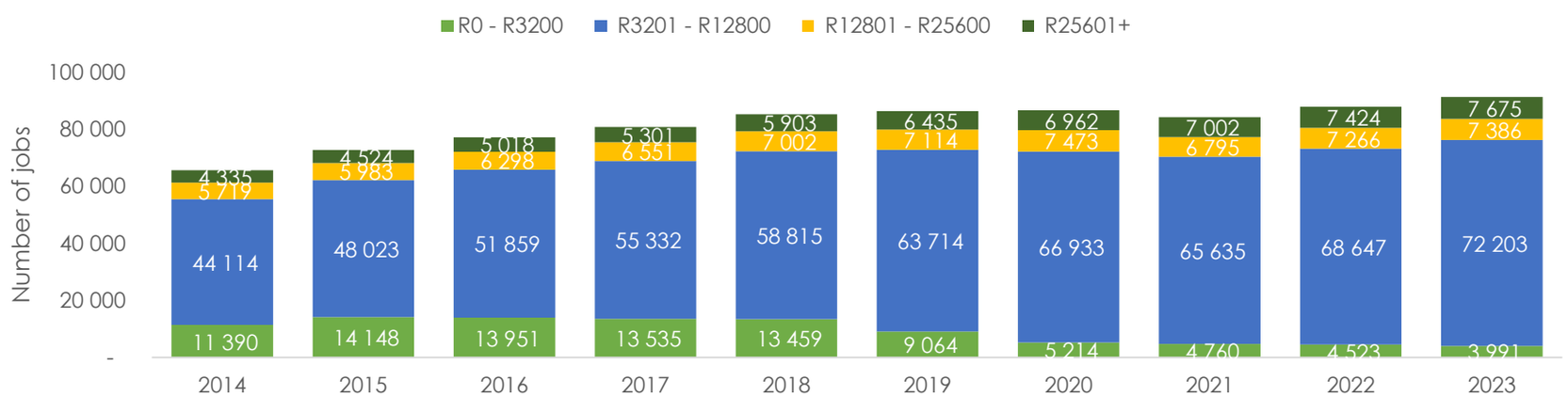
YEAR ON YEAR % CHANGE OF FULL TIME EMPLOYMENT WITHIN EACH WAGE BAND



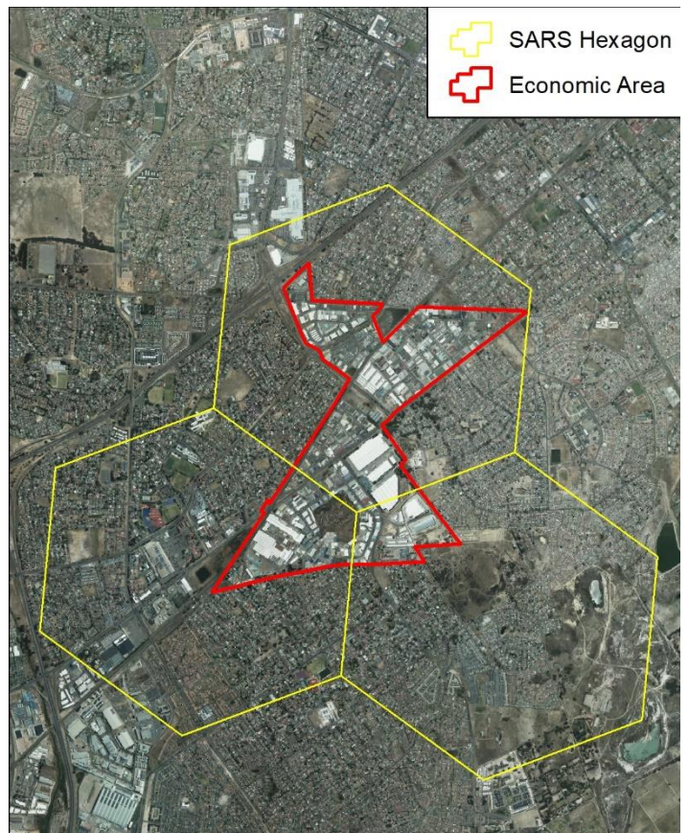
NUMBER OF FIRM TYPOLOGIES



FULL TIME EMPLOYMENT BY WAGEBAND



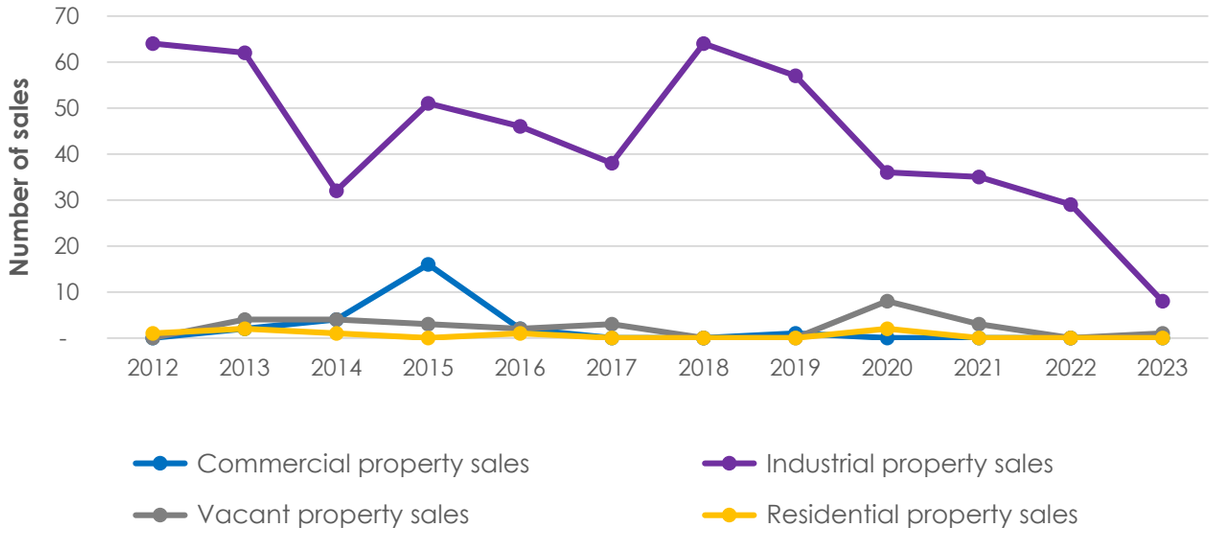
Source: SARS data extract for period between 2014 and 2022. Firm size data only available between 2014 and 2020.



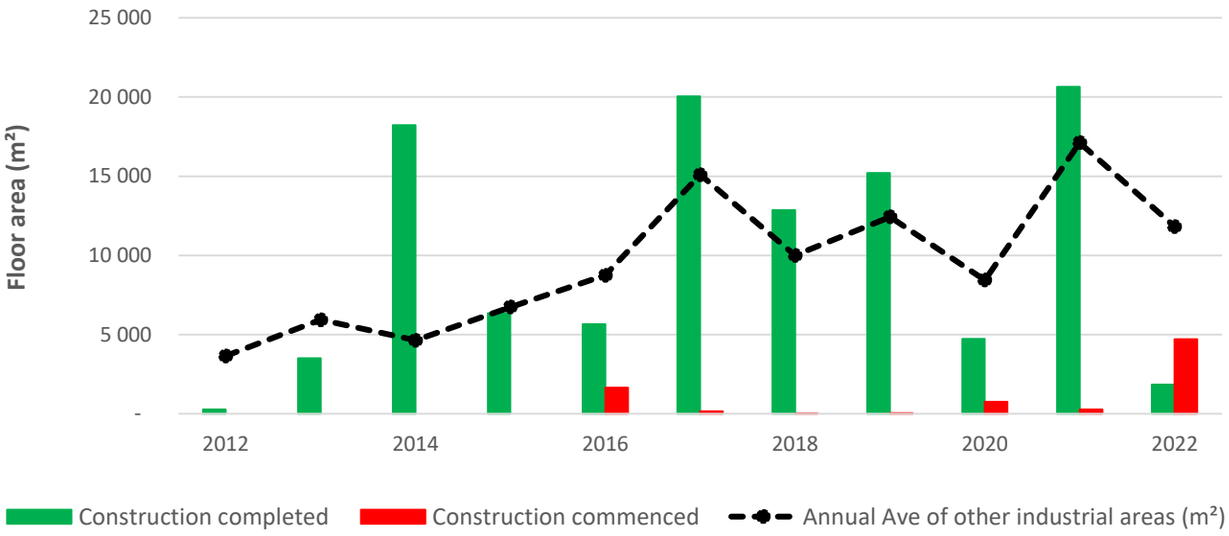
Spatial hexagons in which SARS data has been captured and overlaid with Brackenfell industrial area.

DEVELOPMENT PIPELINE

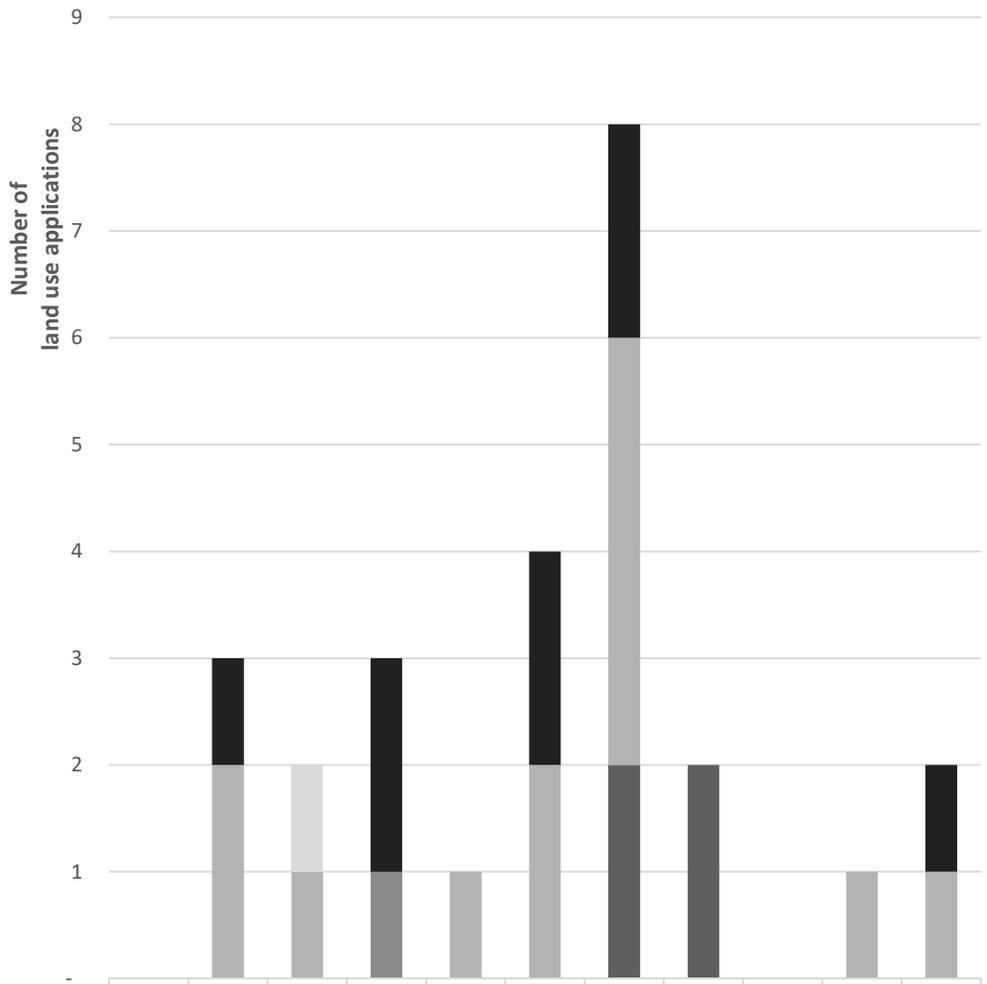
PROPERTY SALES BY SECTOR



BUILDING WORK COMPLETED/UNDER CONSTRUCTION RELATIVE TO AVERAGE OF AREAS WITH SIMILAR CHARACTER



APPROVED LAND USE APPLICATIONS



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Temporary departures		-	1	-	-	-	-	-		-	-
Subdivisions		1	-	2	-	2	2	-		-	1
Rezonings		-	-	1	-	-	-	-		-	-
Multiple applications		2	1	-	1	2	4	-		1	1
Consolidations		-	-	-	-	-	2	2		-	-

Property sales: Most property sales happened between 2012 and 2018 for industrial properties which started to taper down from 2018 to 2023.

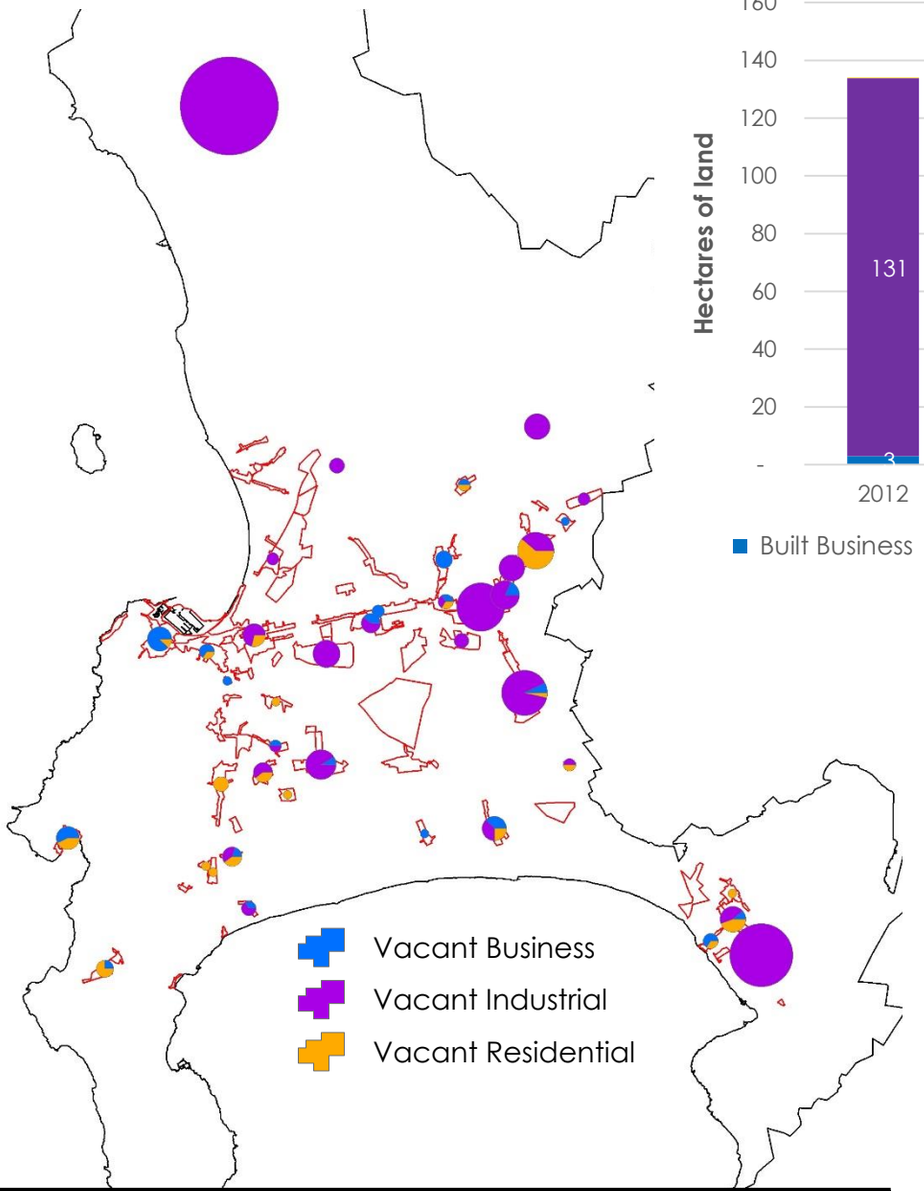
Land use applications: The area experienced the most land use approvals between 2013 and 2019 which can be related to the investment sentiment/intent shown in the property transaction for the this period. While the area is mainly zoned industrial, most of the land use approvals were for subdivisions and multiple applications suggesting a demand for particular sized industrial land.

Building plans: Following on from property sales and land use approvals, construction has shortly happened since the first set of land use approvals were granted in 2013. Building work being constructed commenced significantly from 2014 onwards and has also reflected higher floor area being constructed than that of the metro average across other industrial areas. This trends also suggest a higher investment confidence for the area.

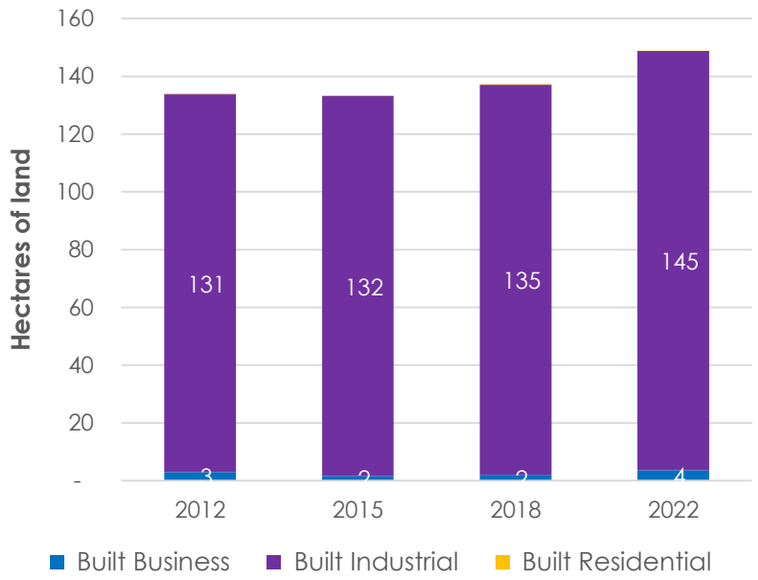
Source: City's DAMS (building plans and land use applications extract), General Valuation Roll.

URBAN LAND MARKETS

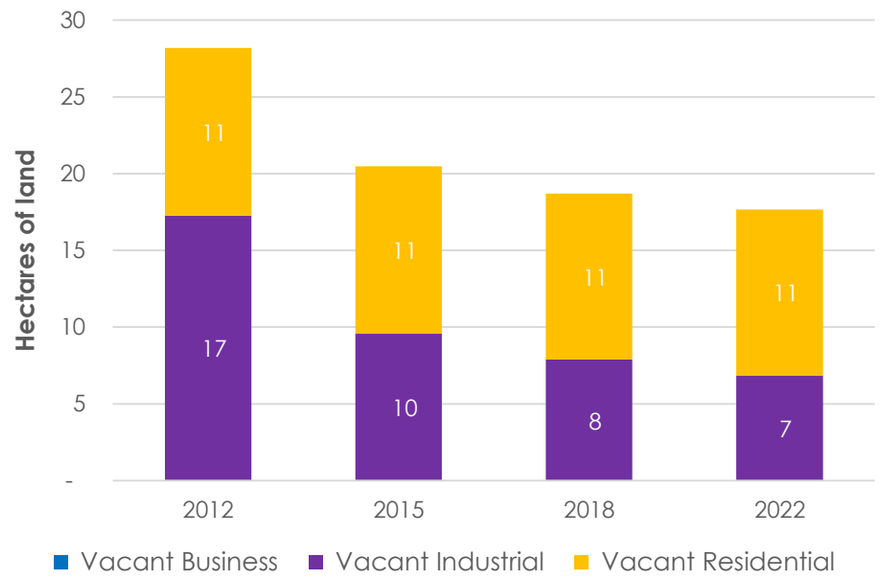
VACANT LAND ACROSS CAPE TOWN (GV 2022)



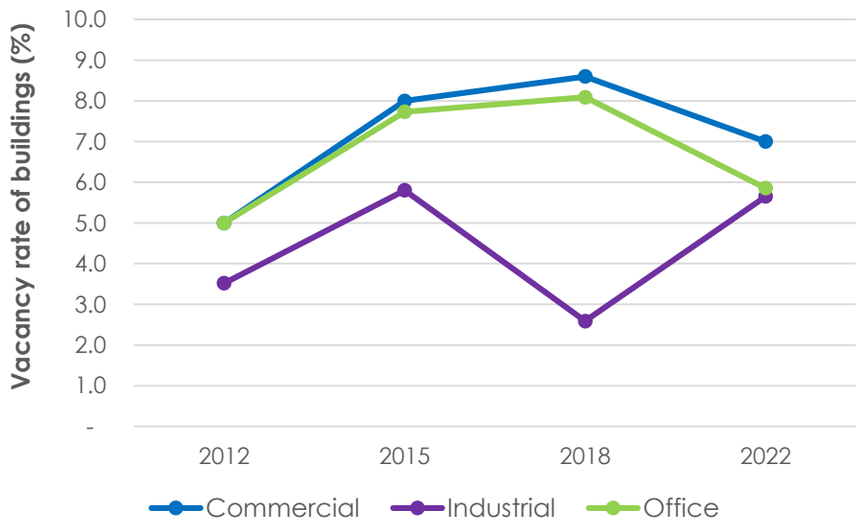
BUILT-UP LAND EXTENT BY SECTOR (TOTAL ERF EXTENT)



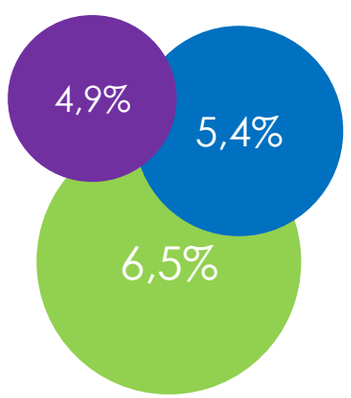
VACANT LAND EXTENT BY SECTOR (TOTAL ERF EXTENT)



VACANCY RATE OF EXISTING BUILDINGS



METRO AVERAGE: VACANCY RATES PER SECTOR FOR 2022



Number of land parcels that are vacant by size			
Erf Size	Commercial	Industrial	Residential
1) 1-250m²			
2) 251-500m²			
3) 501-1000m²		2	
4) 1001-2500m²		15	
5) 2501-5000m²		3	
6) 5001-10000m²		1	
7) >10000m²		2	1

Source: City's General Valuation Roll and Market Reports

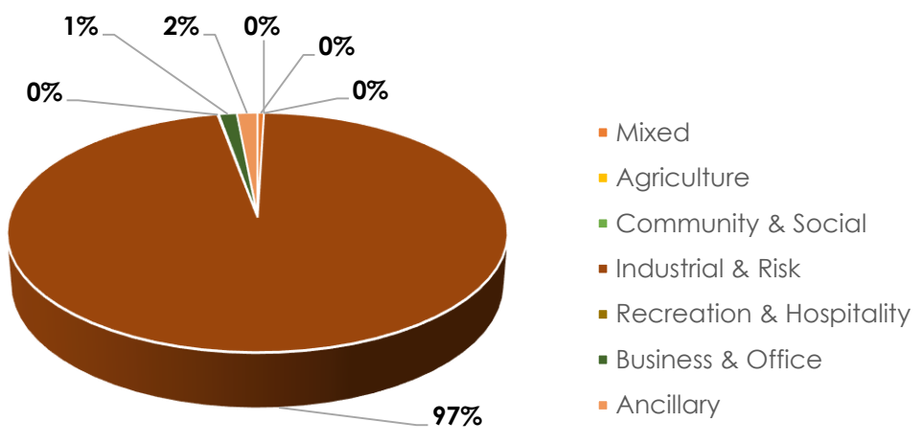
Vacant land:
The map provides a representation of the latest GV Roll (2022) by illustrating vacant land across the metropolitan area and supplements the graph on vacant land for the 2022 GV year. While the area has experienced a gradual growth in terms of the built-up land. There has been a significant take up of vacant land between 2012 and 2022 which can be corroborated with the building work that has been completed and also that which is still under construction till date. Furthermore, the available vacant land is also categorised based on the number and size of land parcels.

Vacancy rates:
In addition to vacant land, vacancy rates of existing buildings for the industrial sector ranged from 3,5% in 2012 to 5,9% in 2022 with an average of 4,5% across years. The commercial sectors has increased from 5% in 2012 to 7% in 2022 while the office sector has also increased from 5% in 2012 to 5,9%.

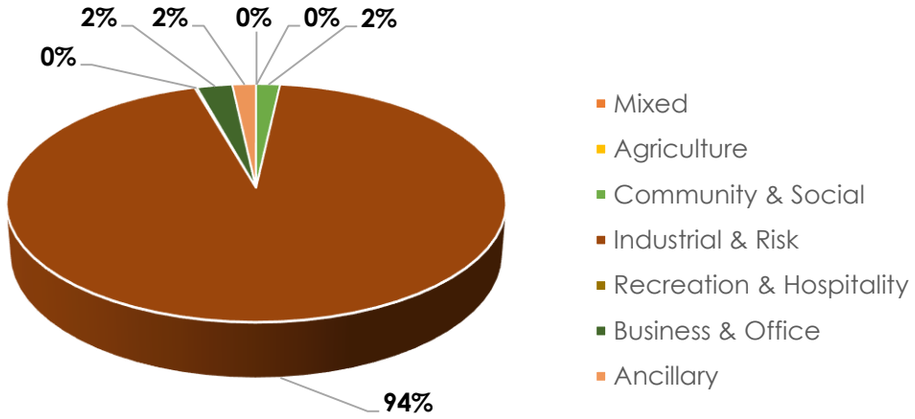
AGGLOMERATION OF INDUSTRIES

SECTORAL AGGLOMERATION AND CO-AGGLOMERATION RELATIONSHIPS

% OF LAND USE GROUPS (2012)



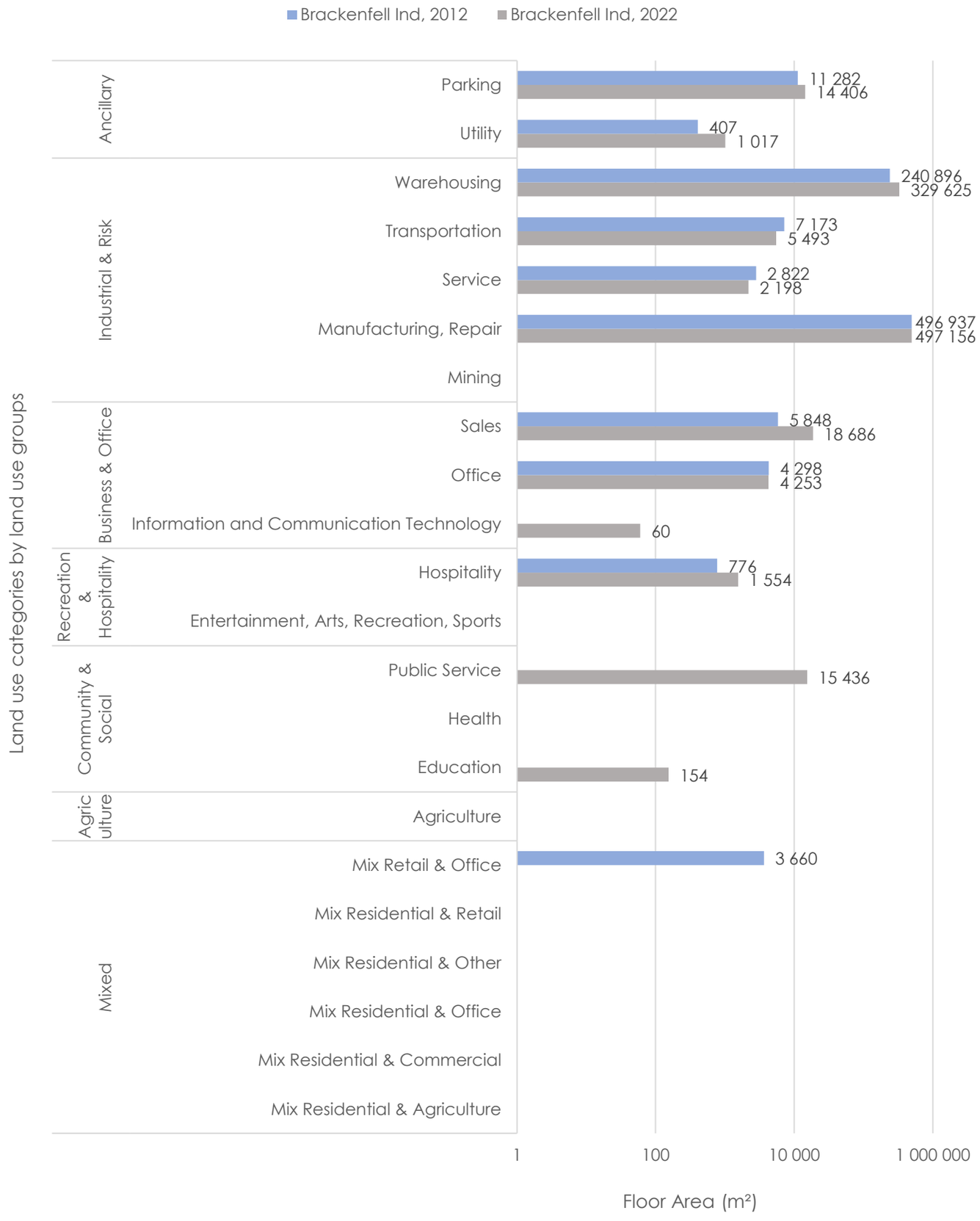
% OF LAND USE GROUPS (2022)



The pie charts represents the % split of land use groups agglomerated in Brackenfell industrial. This % is based on the cumulative floor area (m²) across the various land uses and as can be seen by the chart, the Industrial & Risks group has been dominant in both 2012 and 2022 compared to the other groups which are mainly in support of the dominant land use group.

Furthermore, the bar graph represents a comparative view between 2012 and 2022 on the co-agglomeration of land use categories within each of the land use groups. The area shows the most dominance between 2012 and 2022 for manufacturing, repairs and warehousing. There is also a presence of other industrial land uses which can be seen to be in support of the most dominant land uses.

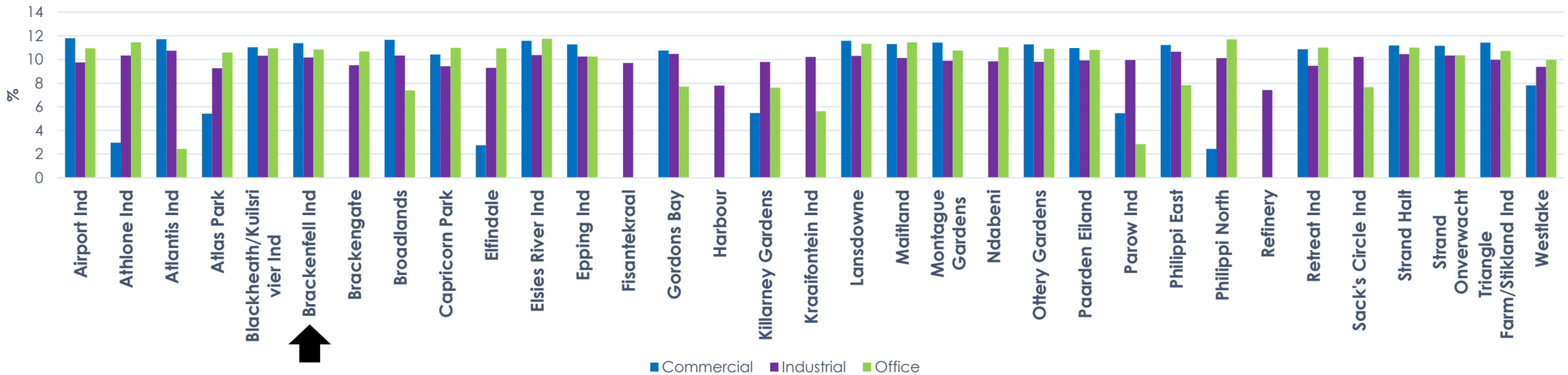
FLOOR AREA PER LAND USE CATEGORY FOR 2012 AND 2022



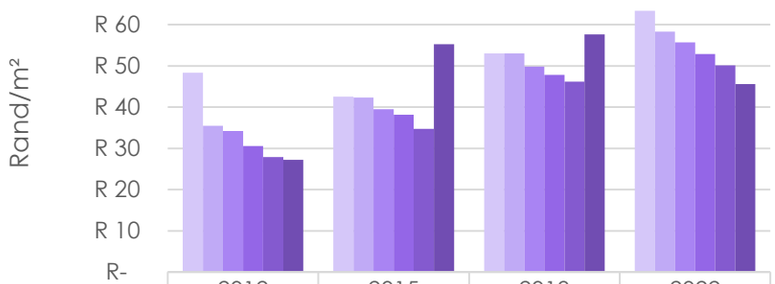
Source: Analysis of GV data (May 2024)

MARKET PERFORMANCE

AVERAGE CAPITALISATION RATE OF BRACKENFELL INDUSTRIAL IN RELATION TO OTHER INDUSTRIAL AREAS FOR THE PERIOD BETWEEN 2012 AND 2022



INDUSTRIAL RENTALS

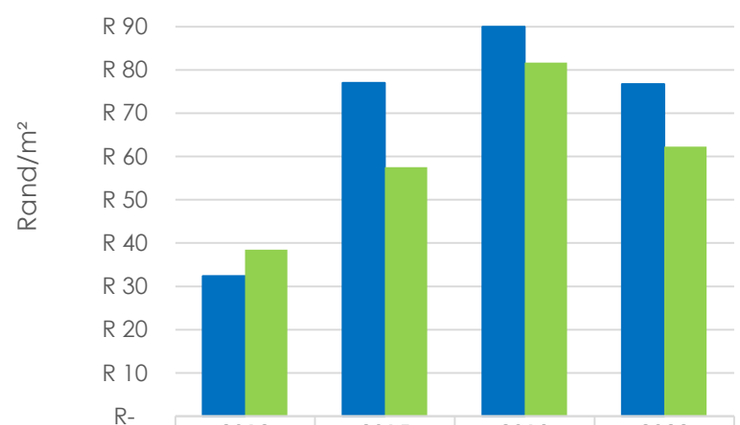


	2012	2015	2018	2022
1) 250m²	R 48	R 43	R 53	R 63
2) 500m²	R 35	R 42	R 53	R 58
3) 1000m²	R 34	R 39	R 50	R 56
4) 2500m²	R 31	R 38	R 48	R 53
5) 5000m²	R 28	R 35	R 46	R 50
6) 10000m²	R 27	R 55	R 58	R 46

Rental rates:
Rental rates across all industrial property sizes gradually increased between 2012 and 2022 and reflects consistency in rental rates across property sizes for 2022. the most increase in rental rates was for smaller and largest property sizes.

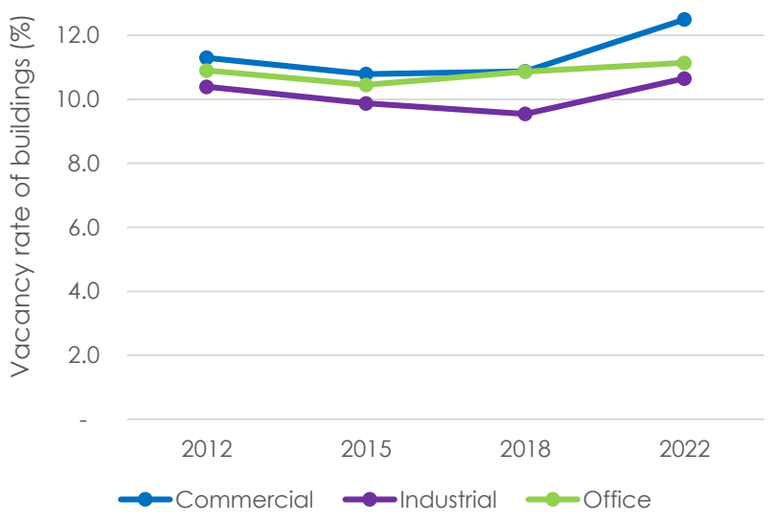
Both office and commercial rentals has increased significantly between 2012 and 2018 with both sectors experiencing a decrease in 2022.

COMMERCIAL AND OFFICE RENTALS



	2012	2015	2018	2022
Commercial	R 32	R 77	R 90	R 77
Office	R 39	R 58	R 82	R 62

CAPITALISATION RATES



Comparative view on cap rates:
The average capitalisation rate between 2012 and 2022 for industrial, office and commercial sectors has been 10,16%, 10,84% and 11,37% respectively and further indicating its competitiveness relative to other industrial areas.

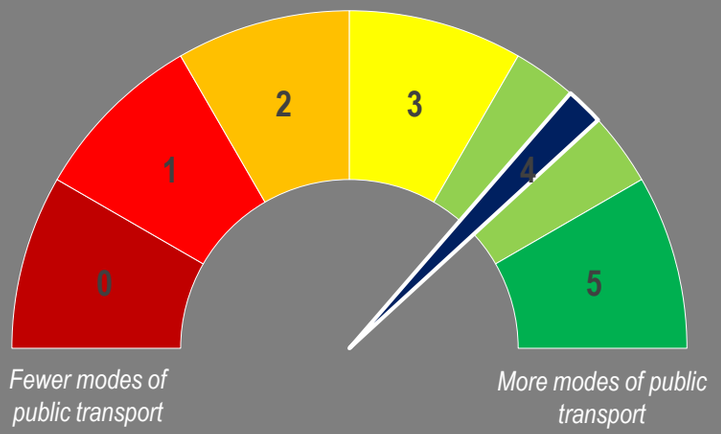
Year on year cap rates for the industrial sector has remained consistent around the 10,5% mark, the same applies for the office sector showing consistency round the 11% mark while cap rates for the commercial sector has increased from 11,3% to 12.5%.

- *Higher cap rates = higher investment risk.*
- *Lower cap rates = lower investment risk.*

FINDINGS – draft

Potential:

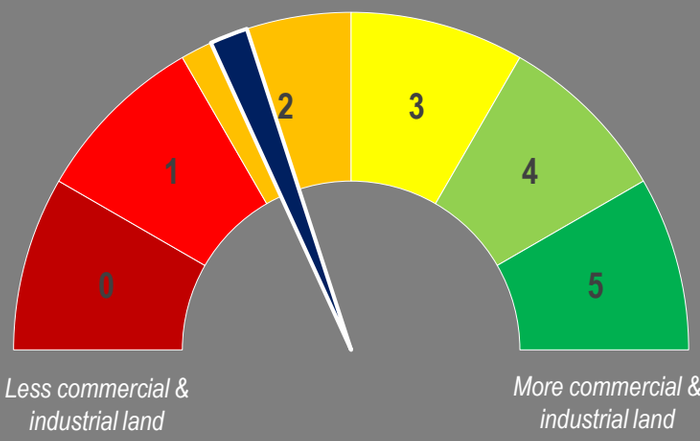
PROXIMITY TO PUBLIC TRANSPORT



Fewer modes of public transport

More modes of public transport

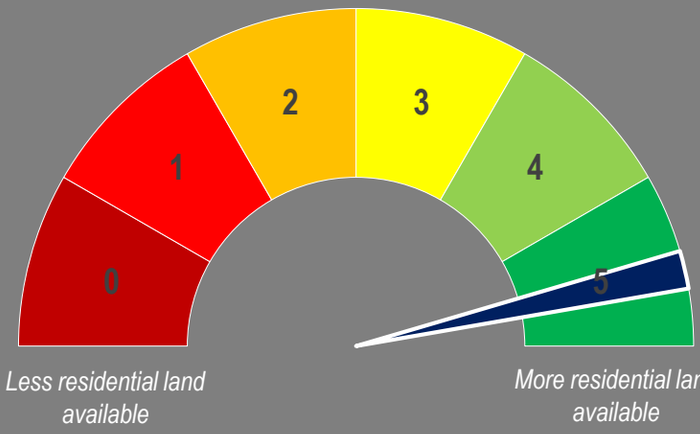
VACANT NON RESIDENTIAL LAND



Less commercial & industrial land

More commercial & industrial land

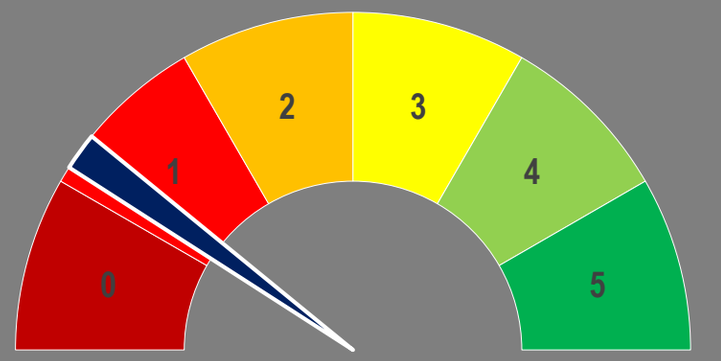
VACANT RESIDENTIAL LAND



Less residential land available

More residential land available

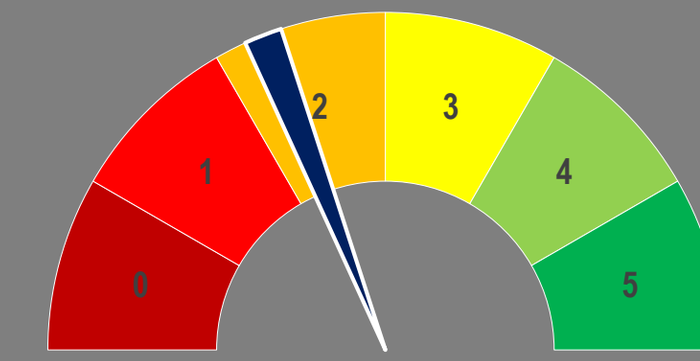
COMMERCIAL BUILDING VACANCY RATE



Lower vacancy rates

Higher vacancy rates

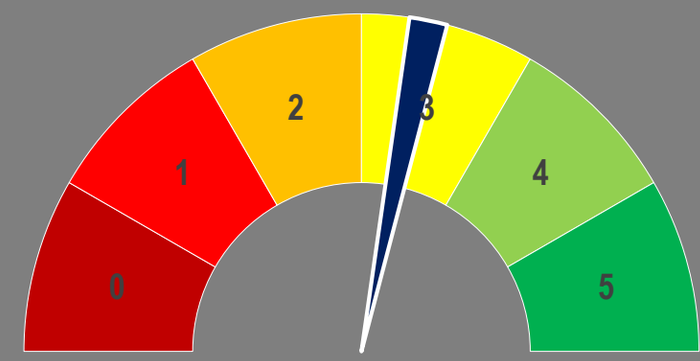
INDUSTRIAL BUILDING VACANCY RATE



Lower vacancy rates

Higher vacancy rates

INCENTIVES AND PRECINCT MANAGEMENT



Fewer facalitative instruments

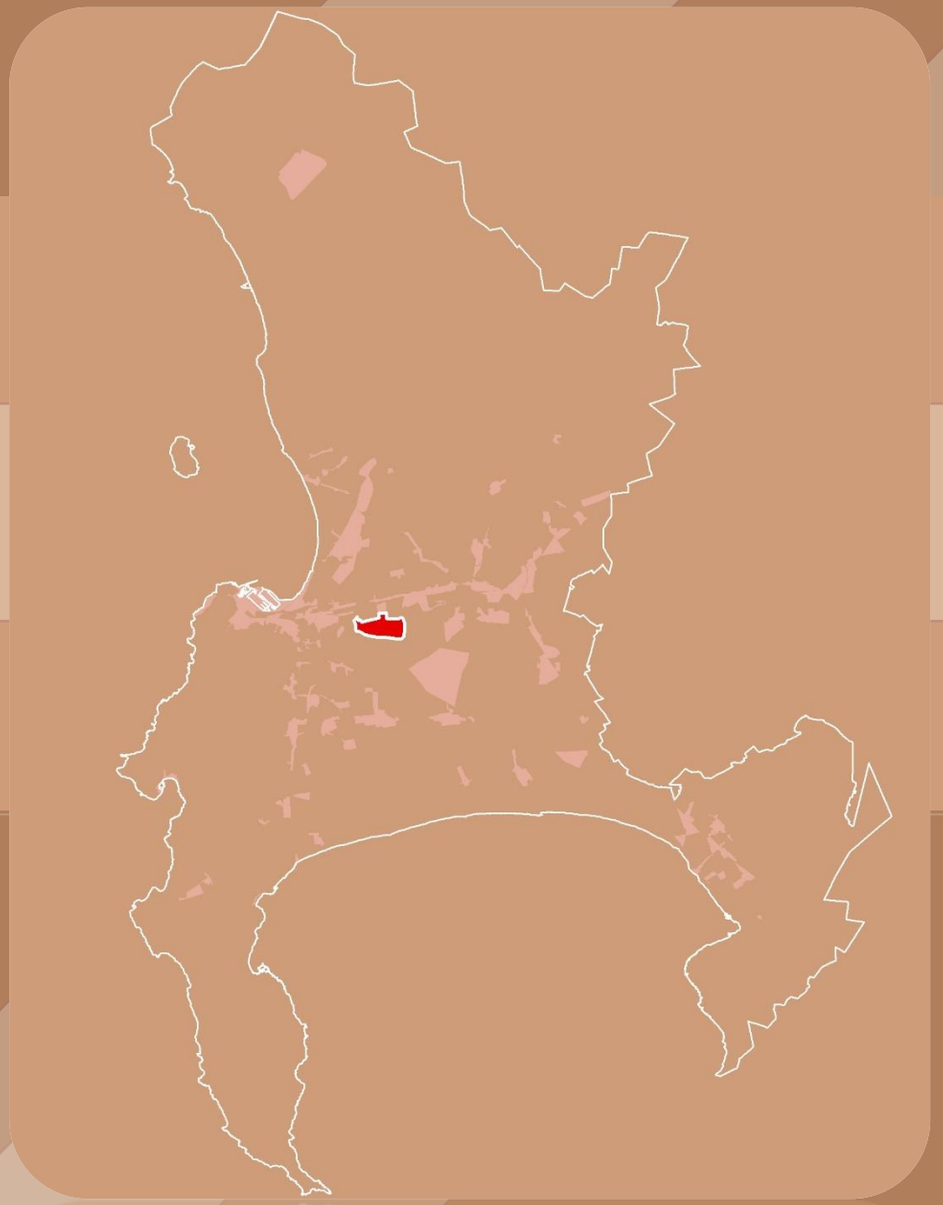
More facalitative instruments

Performance: pending under development

EPPING INDUSTRIAL ECONOMIC AREA PROFILE

TREND ANALYSIS 2012-2022





June 2024

CITY OF CAPE TOWN
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POLICY & REGULATORY CONTEXT

For the past decade the global and national economic context has required regional economies to prioritise its investment decisions in space for greater efficiency. The Economic Areas Management Programme (ECAMP) as it was introduced has therefore been considered a valuable economic data tool to providing valuable insights into the performance of the space economy at an area-specific level.

This update of ECAMP is further aligned to the Urban Planning & Design Department's business strategy to leverage spatial intelligence to unlock value within Cape Town's space economy by:

a) Tracking the performance and implementation of its spatial development framework policies
b) Developing the evidence base to inform and adjust said spatial policy
c) Supporting spatially targeted investment decision-making
d) Providing a spatial lens of economic data within the Cape Town context

The update of ECAMP is supported by the following strategic objectives and programmes:



INTEGRATED DEVELOPMENT PLAN 2022-2027

- Objective 1 (Increased jobs and investment in the Cape Town Economy): Targeted urban development programme
- Objective 15 (A more spatially integrated and inclusive city): Spatial strategy monitoring and evaluation project

INCLUSIVE ECONOMIC GROWTH STRATEGY (2021)

- Applying an economic lens to policy-making by integrating sustainable analysis into City Decision Making in alignment with the MSDF.
- The primary and most immediate scope of work must centre around economic recovery. To this end, implementation of this Strategy will be in the form of a three-phase recovery approach.

MUNICIPAL SPATIAL DEVELOPMENT FRAMEWORK (MSDF, 2023) POLICY & STRATEGY IMPLEMENTATION

- Table 5.1: Spatial strategy 1: Substrategies and policy guidelines (Policy 2, 4 and 5)
- Table A2: Spatial strategy 1: Policy guidelines, strategic and implementation intent (Policy 4,2 and 4,3)

DISTRICT SPATIAL DEVELOPMENT FRAMEWORK (DSDF, 2023): SUB DISTRICT GUIDANCE

- Table Bay DSDF - Subdistrict 4: Eastern District:
  - Typologies and district elements – Development guidelines (page 72)
  - Policy statements (page 156)
  - New Development Areas (page 157)
  - Consolidated subdistrict SDF (Figure 26: Subdistrict 4: Eastern District)

CONCEPTUAL FRAMEWORK

Intended users
This profile provides a cohesive narrative to determine key trends across a number of data entry points to help inform decision making. This profile also aims to help guide investment in cases where data is not readily available to the public.

Conceptual Framework
The reporting of updated time series microeconomic analysis on Cape Town's economic areas is informed by a conceptual framework, which aims to create spatial intelligence on *supply & demand factors according to the 5* themes which has been identified. The 5 themes allows for an integrated narrative across area-based economic trends. The trends being reported throughout this profile is used to classify and assess the overall performance of Cape Town's economic areas.

Data preparation, sources, assumptions and limitations
The indicators reported on in this profile feed off a number of automated data processes to add intelligence at a land parcel level which is then aggregated into economic areas. This profile draws across various datasets between 2012 and 2022 such as the general valuation roll, market reports, building plans, land use applications, property sales and SARS data. While many of the respective datasets are continuously refined overtime, this profile will be updated as and when new data is available.

Contact details
Should you wish to make contact, please direct your feedback to the City of Cape Town's Metropolitan Spatial Planning and Growth Management branch via Future.CapeTown@capetown.gov.za

MACRO-ECONOMIC REPORTS AND INDICATORS
The purpose of this profile is not to provide a comprehensive summary of macro-economic factors determining the basis for which industries invest in based on the economic condition. Refer to reports to read more about macro-economic indicators reported for Cape Town:

- Economic Performance Indicators for Cape Town
- Regional Market Analysis and Intelligence 2023/24
- Provincial Economic Review and Outlook (PERO)
- Municipal Economic Review and Outlook (MERO)

MICRO-ECONOMIC DEMAND & SUPPLY FACTORS
This profile considers an array of micro-economic indicators in providing trends on *Supply and Demand* unique to an economic area. These indicators include:

- Property sales per land use sector
- Building work completed
- Types of land use applications approved
- Vacant land per land use sector
- Built-up land and take up rate per land use sector
- Dominant land uses present in an area
- Building vacancy rate overtime
- Capitalisation rate over time
- Rental rate p/m² by land use sector
- Jobs per industry

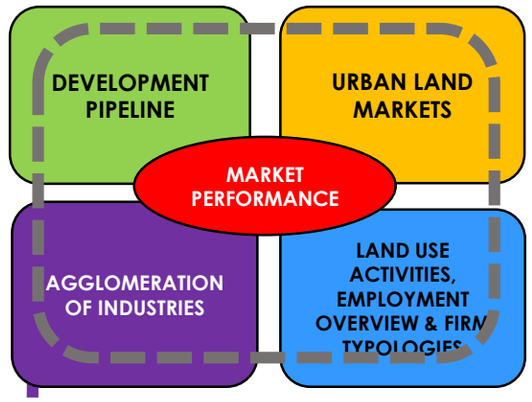
WHY

VALUE PROPOSITION	CHALLENGES /OBJECTIVES TO ADDRESS	AREAS OF APPLICATION
Promoting economic infrastructure in support of economic growth and job creation. Supports internal and external collaboration around data and spatial intelligence. Supports the spatially differentiated investment rationale of the MSDF and DSDFs.	**Urban Growth Planning (Non-res growth estimates)**: Determine where to accommodate ne non-res growth. **Spatial intelligence**: Location-based supply and demand factors. **Enhanced spatial policy**: Evidence-based analysis on Cape Town's space economy informing a policy framework.	Land Use Model 2050 update. Replacement of the static and dated ECAMP with an updated, automated economic analysis tool. Support: Business retention & expansion initiatives. Data foundation behind MSDF Policy Statement 4.

WHAT

Supply, Demand & Performance (S,D & P)

Building work under construction/completed **(S)**.
Land use approvals **(D)**.
Property sales by sector **(P)**.



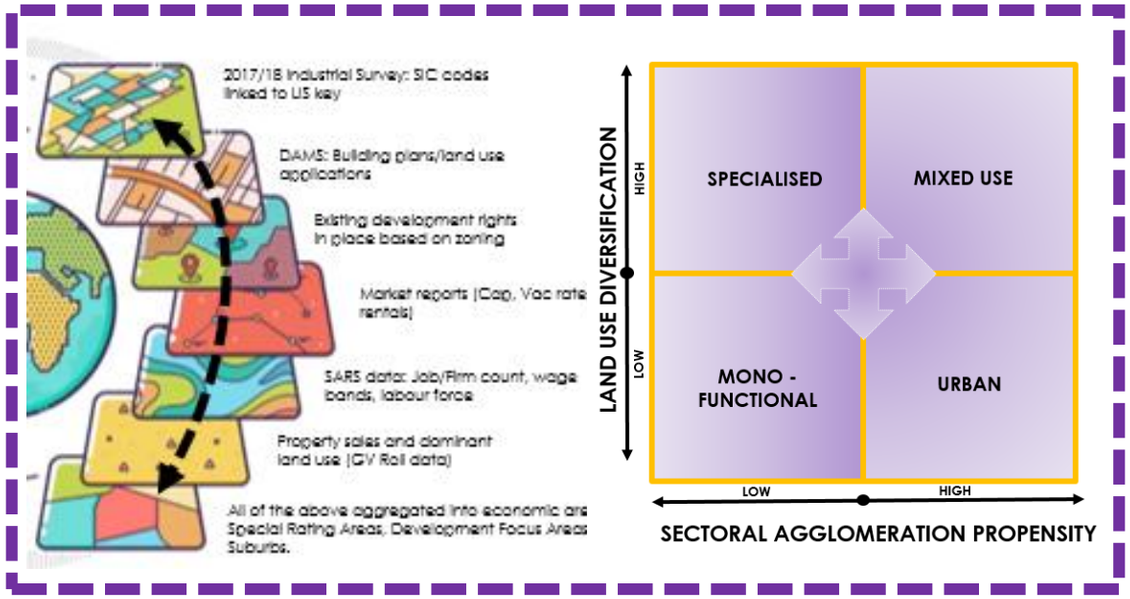
Built-up extent (m²) of land per sector **(S)**.
Vacant land (m²) per sector **(S)**.
Vacancy rate of buildings (%) per sector **(P)**.

Agglomeration and Co-agglomeration of major sectors/industries **(S)**

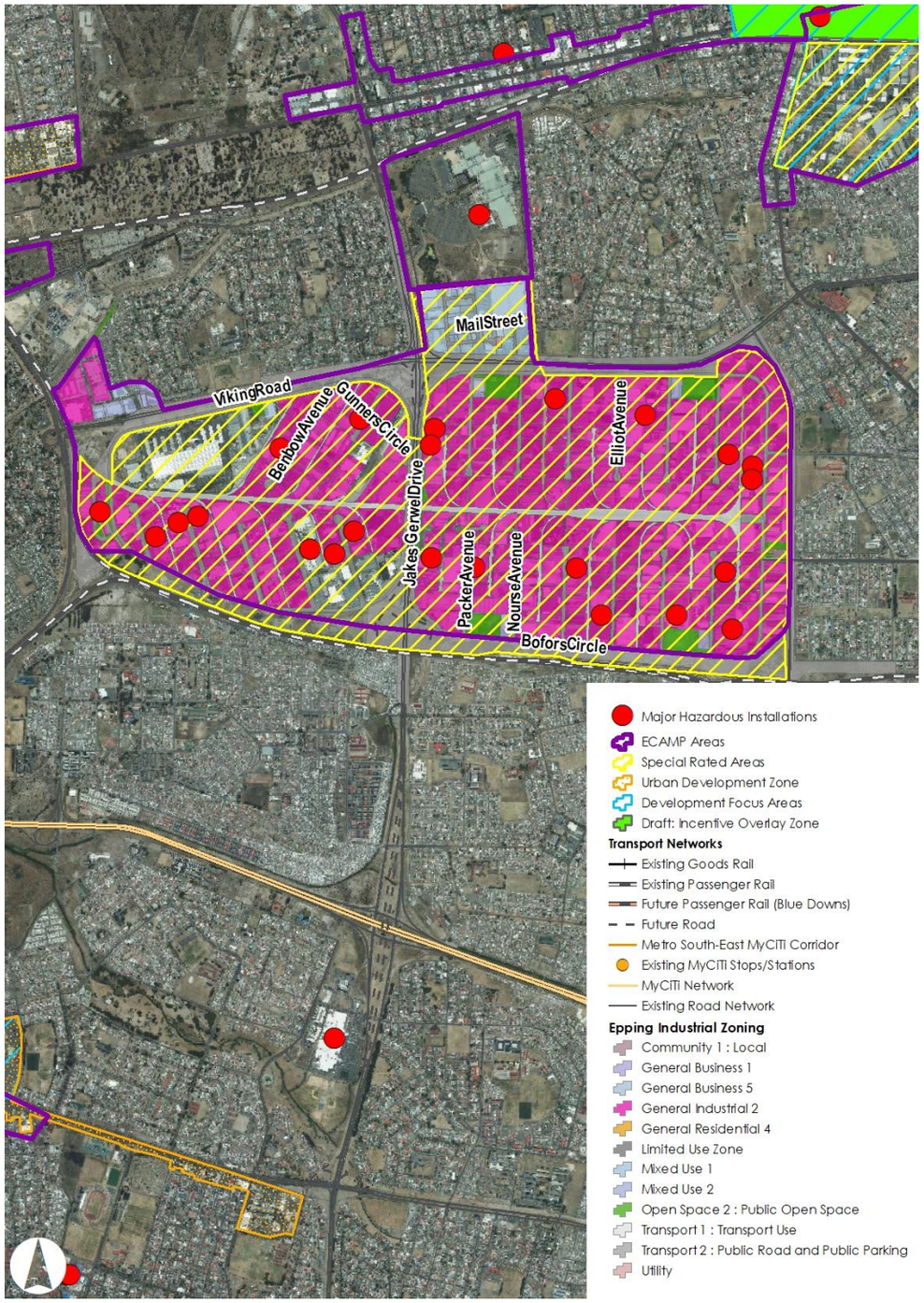
Dominant land use **(S)**
Propensity of industries at a Metro scale **(D)**.
Total jobs per industry & wage band **(D)**.
Firm size and count **(D)**.

Cap rates **(P)**
Rental rates per m² per sector **(P)**

HOW



INTRODUCTION



EPPING INDUSTRIAL

Location

- The area is approximately 10km east of Cape Town's central business district and Port of Cape Town. Furthermore, located 5km from Cape Town International Airport to allow for efficient import and export of goods.
- The area is split in half by the N7 and further situated near the N1 and N2 highway, providing easy across Cape Town and connecting to areas beyond Cape Town.
- The area is in proximity to a Public Transport Interchange and serviced by rail, taxis and GABS.
- Access to a skilled workforce from surrounding areas, Pinelands, Goodwood, Kalksteenfontein, Bishop Lavis and Elsies Rover. Due to its location, the area also attracts skilled workforce from areas across Cape Town.

Zoning and Land Use

- The area is predominantly zoned for industrial use allowing for manufacturing, warehousing, and distribution activities.
- The area is mainly characterised by light industrial uses and warehousing.
- Types of land uses include warehousing, transportation, sales, manufacturing, repairs and office accommodation.

Plot Sizes

- The average plot sizes in the area mostly vary between 5 000 – 10 000m² with a limited amount of plots ranging beyond 10 000m².

Spatial planning mechanisms

- The area is serviced by a City Improvement District

Key highlights of the area include:

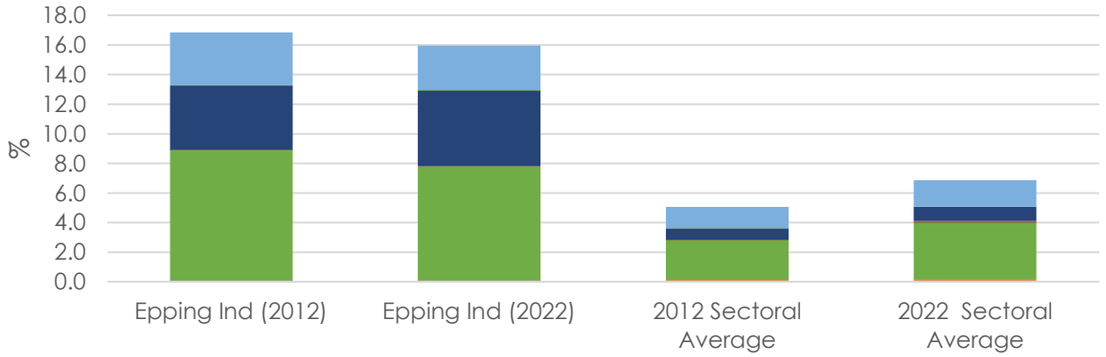
- The area had previously been used as a race track and started to establish itself as an industrial area from 1940 onwards. As the area established itself further, the racing was stopped.
- Epping City Improvement District was established in 2001 designed to increase property investment, amplify job creation and encourage new investments into the area.
- The area is know for some key anchor industries mainly, SA Metal, TFG, Stuttafords removal/storage and the monumental land mark, Cape Town fresh produce market.

LAND USE ACTIVITIES

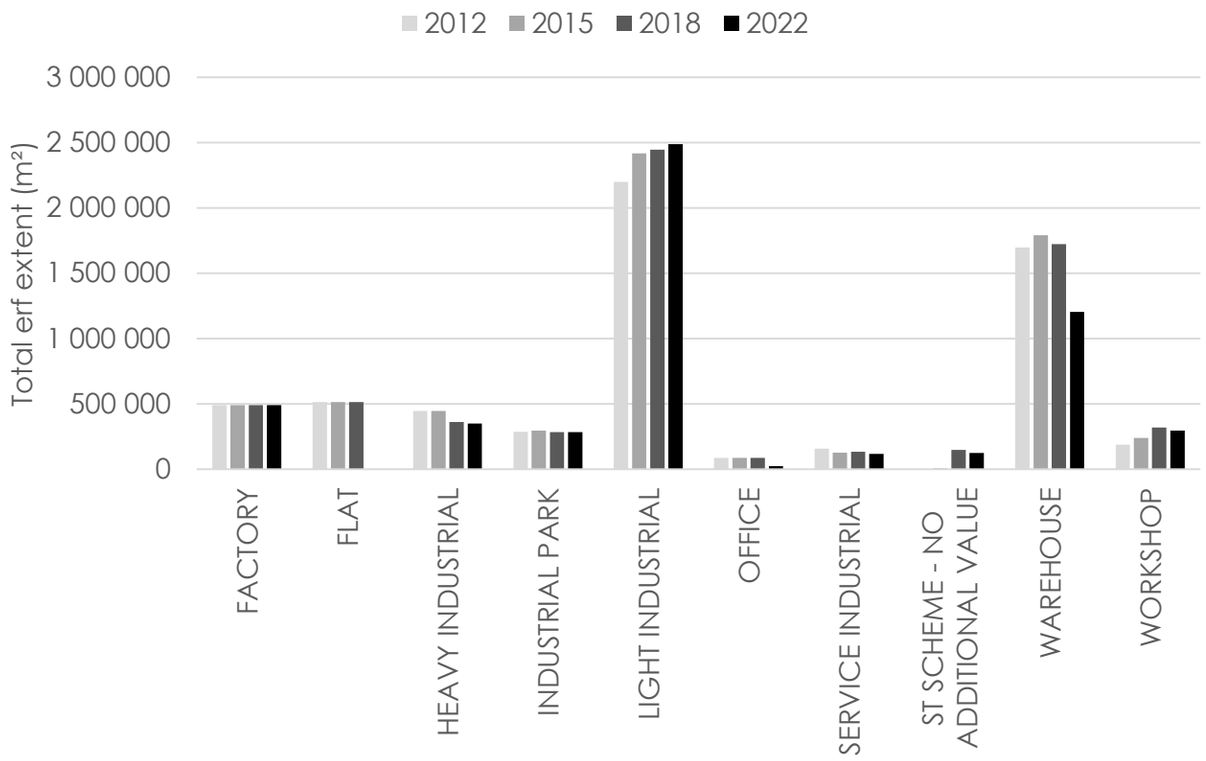
Recent analysis entailed the conversion of land use codes contained in the GV Roll into SIC codes in order to determine propensity of industries operating in areas of similar character.

- Between 2012 and 2022, Epping industrial was mainly characterised by a greater propensity for manufacturing, transport & storage and wholesale & retail as reflected in the **Nodal Typology**. The nodal typology highlights industries with the most floor area (m²) operating within an economic area.
- The **Metroscale Benchmarking** positions Epping industrial to being a contributor of manufacturing, transport & storage and wholesale & retail which is higher than that of the sectoral average when measured against other industrial areas across Cape Town.
- The GV Roll supplements the findings of the SIC level data by illustrating the **dominant land use** overtime based on the cumulative extent (m²) of floor area for light industrial, warehousing, workshops, factories, industrial parks, service industrial and flats.

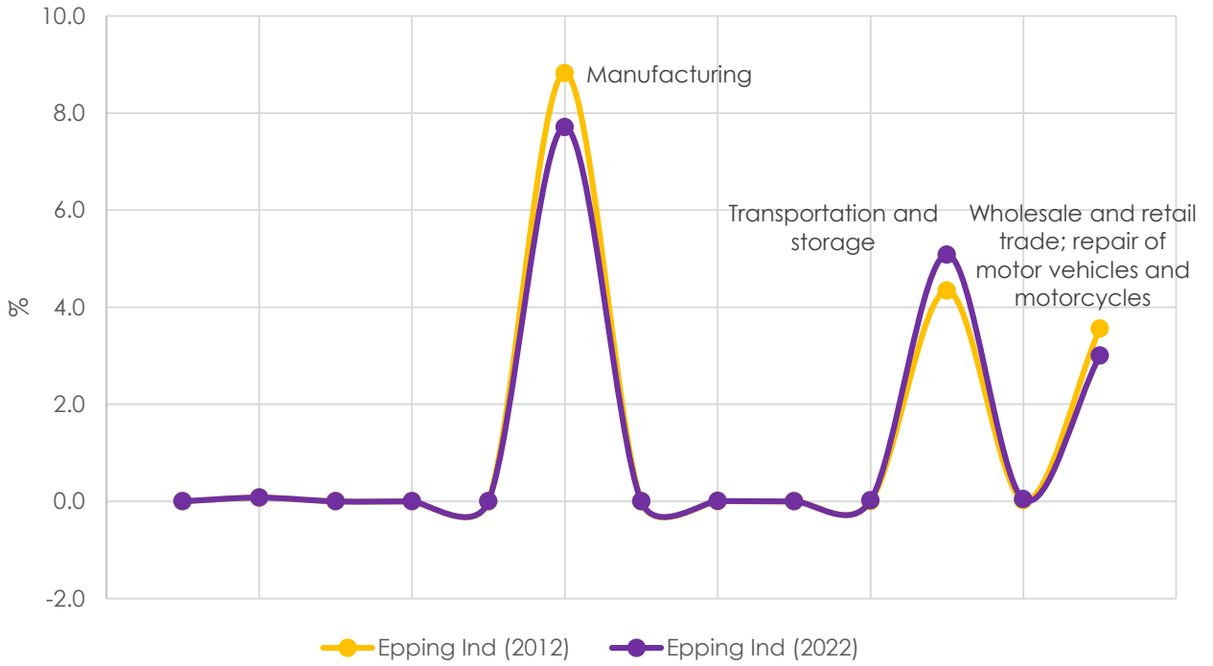
METROSCALE BENCHMARK



CUMULATIVE EXTENT OF THE MOST DOMINANT LAND USES BETWEEN 2012 AND 2022



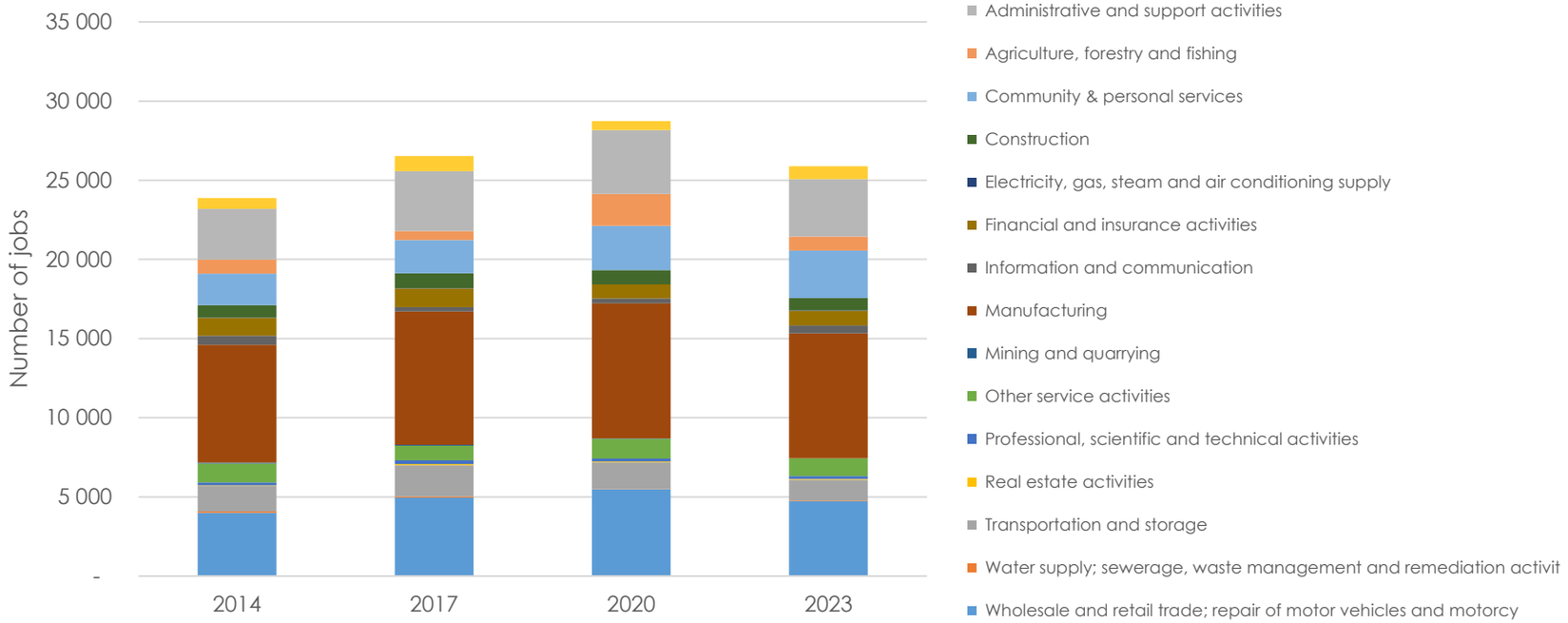
NODAL TYPOLOGY FOR 2012 AND 2022 (*Mixed Industrial*)



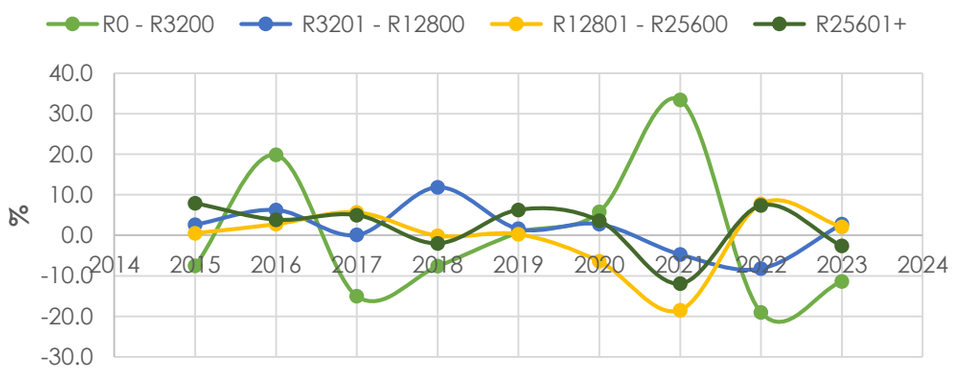
Source: 2012 – 2022 land use codes converted to SIC codes (May 2024 analysis)

EMPLOYMENT OVERVIEW & FIRM TYPOLOGIES

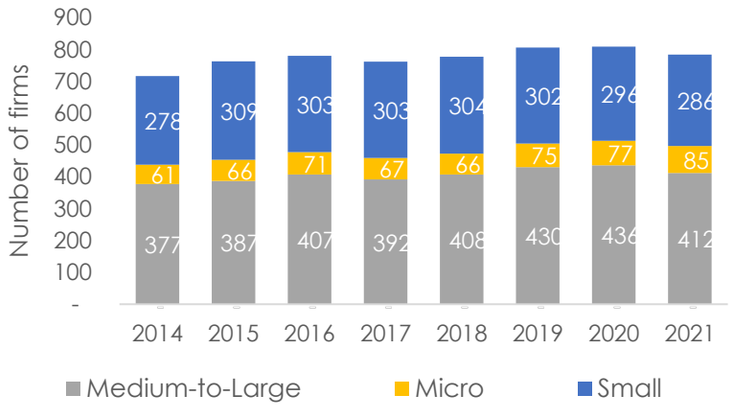
FULL TIME EMPLOYMENT BY INDUSTRY



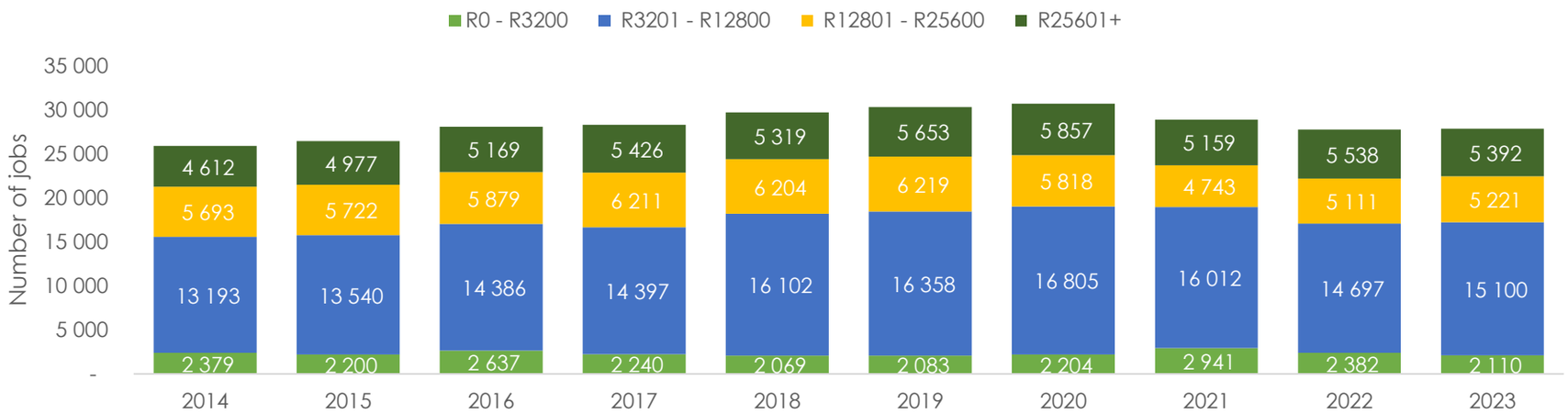
YEAR ON YEAR % CHANGE OF FULL TIME EMPLOYMENT WITHIN EACH WAGE BAND



NUMBER OF FIRM TYPOLOGIES



FULL TIME EMPLOYMENT BY WAGEBAND

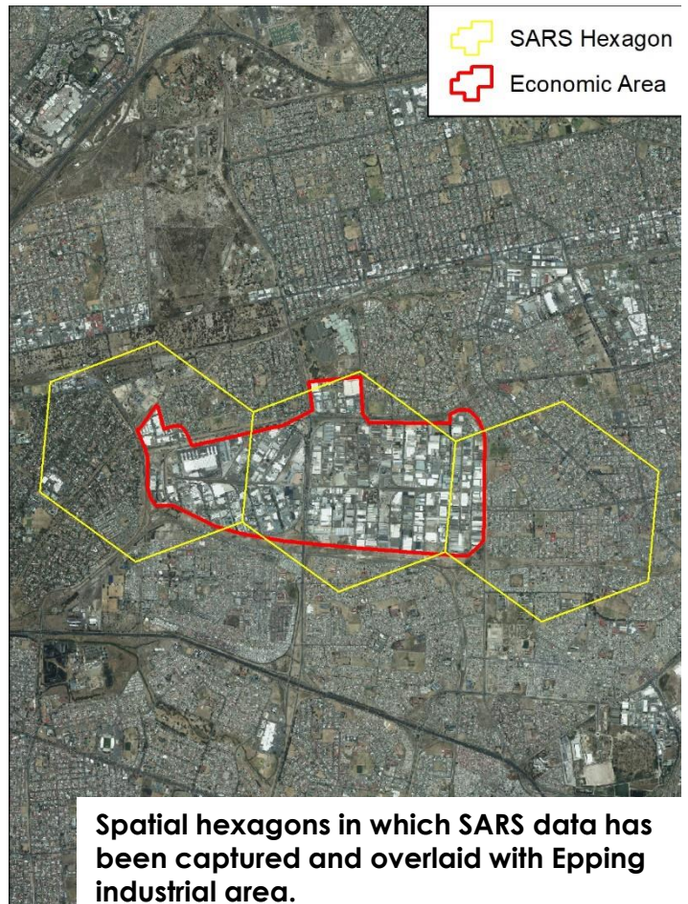


Source: SARS data extract for period between 2014 and 2022. Firm size data only available between 2014 and 2020.

Jobs/Firms: The number of job opportunities surrounding Epping industrial increased from 24 000 to 26 000 between 2014 and 2023. An increase in jobs has been observed between 2017 and 2020 with the decrease in jobs at 2023 but still relatively higher than 2014. Overtime, majority of the jobs have been positioned within the manufacturing, wholesale and admin support industries.

The total number of firms fluctuated around the 700 mark between 2014 and 2021. While 'medium-to-large' firm sizes are most dominant, there has also been a significant presence of 'small' firms and also includes 'micro' firms.

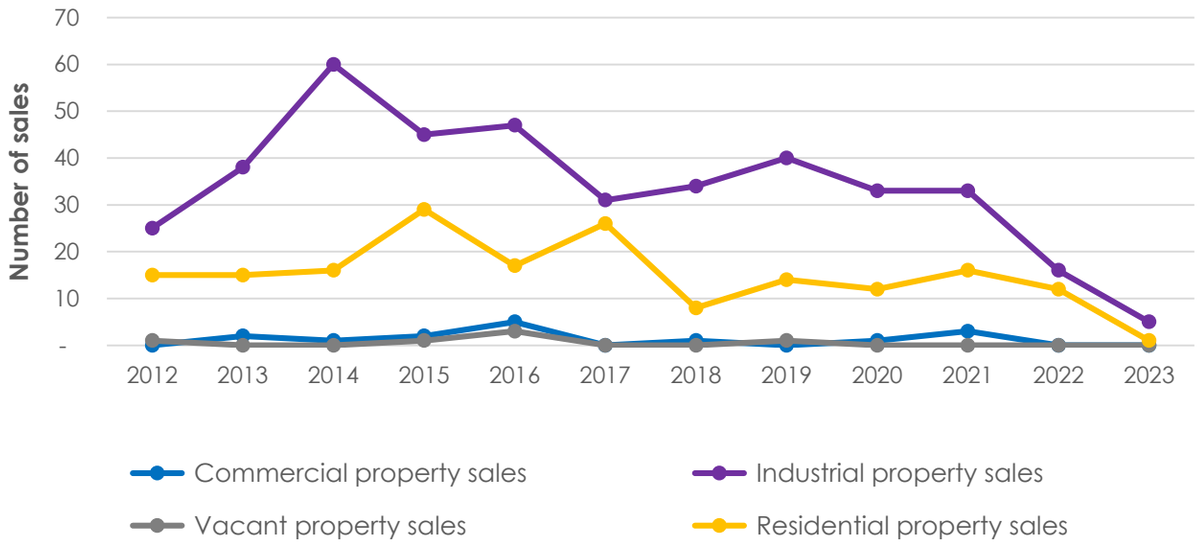
Income bands: The income bands provide an indication of the skill level that is being employed. The data suggests that a larger proportion of employees earns up to R12 800 per month. However, there is a considerable amount of employees earning above R12 800.



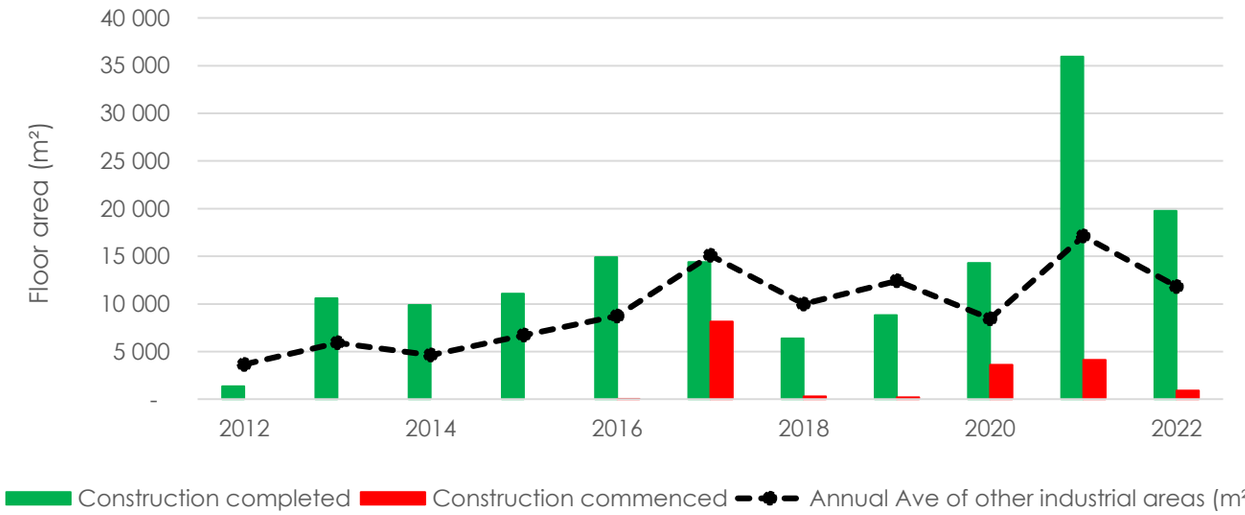
Spatial hexagons in which SARS data has been captured and overlaid with Epping industrial area.

DEVELOPMENT PIPELINE

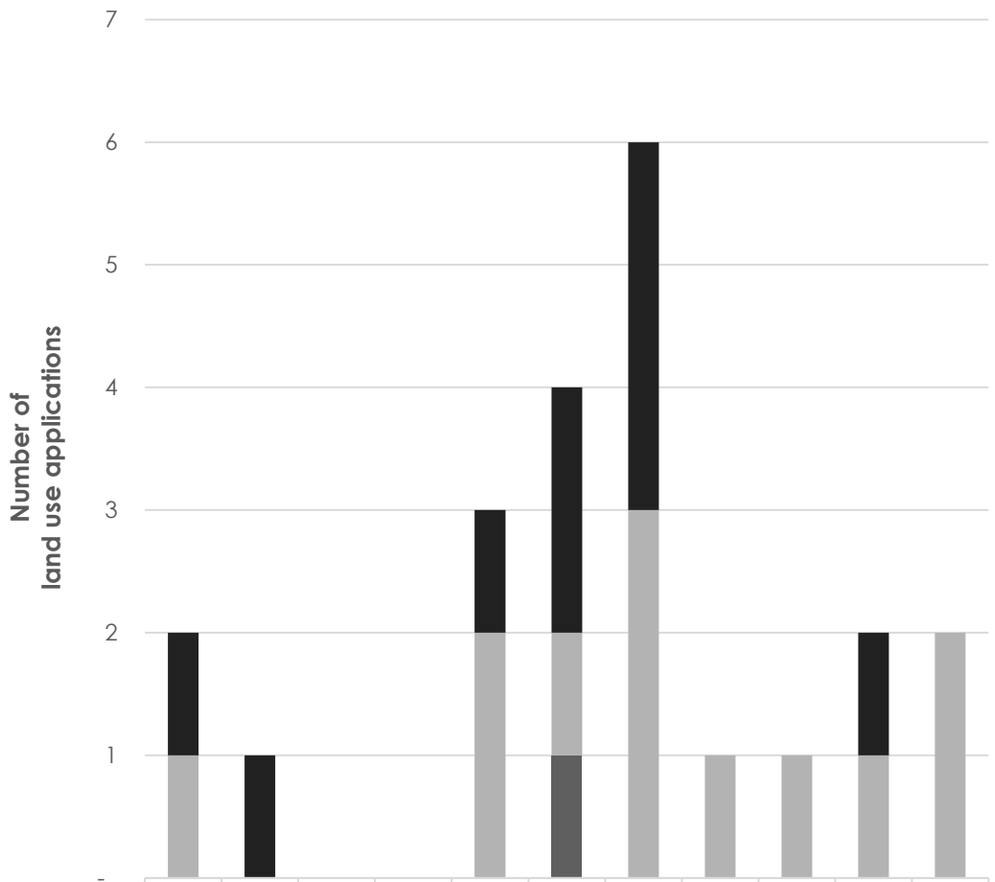
PROPERTY SALES BY SECTOR



BUILDING WORK COMPLETED/UNDER CONSTRUCTION RELATIVE TO AVERAGE OF AREAS WITH SIMILAR CHARACTER



APPROVED LAND USE APPLICATIONS



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Temporary departures	-	-			-	-	-	-	-	-	-
Subdivisions	1	1			1	2	3	-	-	1	-
Rezonings	-	-			-	-	-	-	-	-	-
Multiple applications	1	-			2	1	3	1	1	1	2
Consolidations	-	-			-	1	-	-	-	-	-

Property sales: Property sales/transactions of existing built-up industrial land fluctuated between 2012 and 2022 with a spike in 2014 and tapering down gradually up to 2022. A number of residential land parcels has also been transacted on but not to the extent of existing built-up industrial land. While transactions tapered off in 2023 across the 2 sectors, approval of land use rights increased significantly from 2016 onwards which followed through by building work being completed and that which is under construction indicating investment confidence for the area.

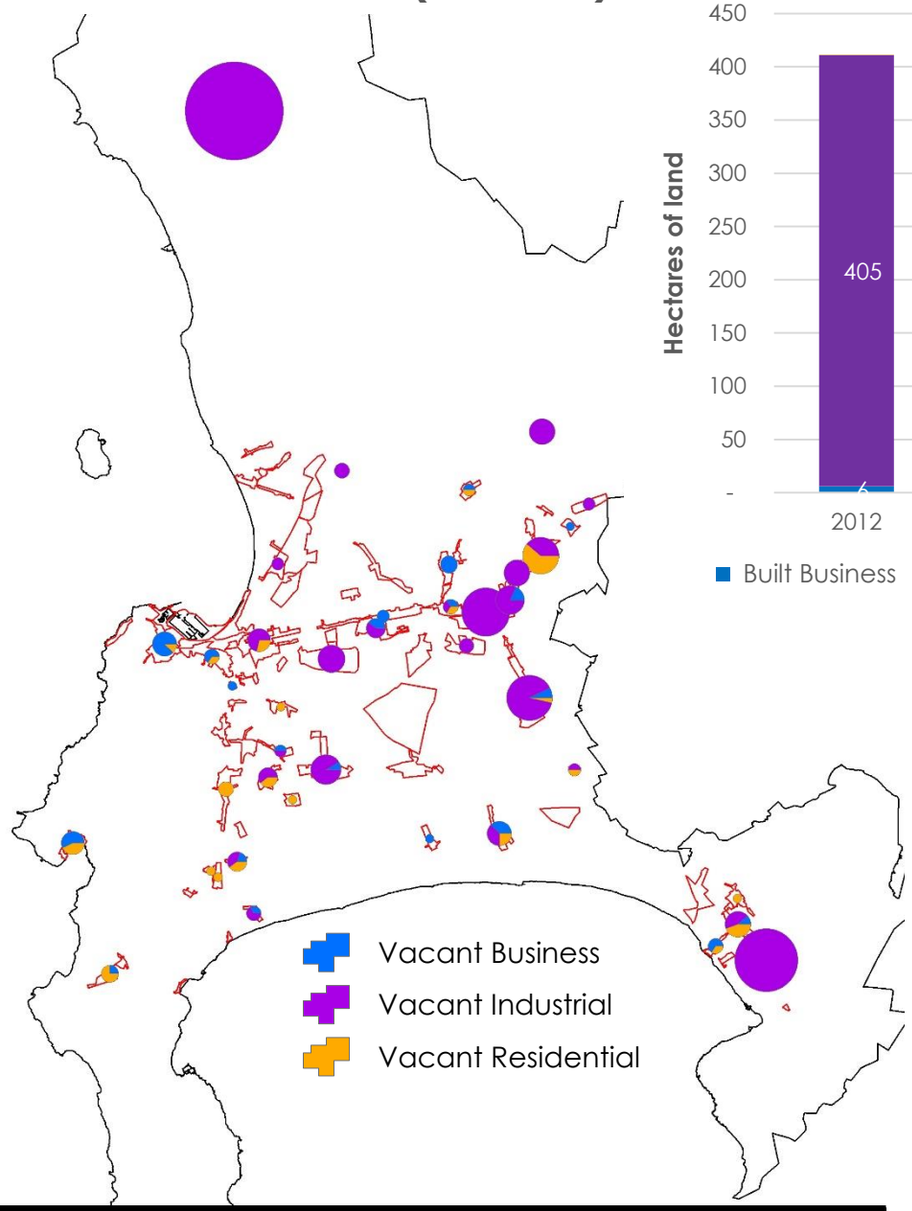
Land use applications: While the area is predominately zoned for industrial purposes most of the land use approvals granted between 2012 and 2022 were for subdivisions and multiple applications. Subdivisions suggesting a demand for a particular property size.

Building plans: Following on from property sales and land use approvals, construction has happened consistently between 2013 and 2017 where construction has been higher than the metro average across other industrial areas. While land use approvals increased between 2016 and 2018, building work also started to increase again from 2020 onwards and experiencing a spike in 2021.

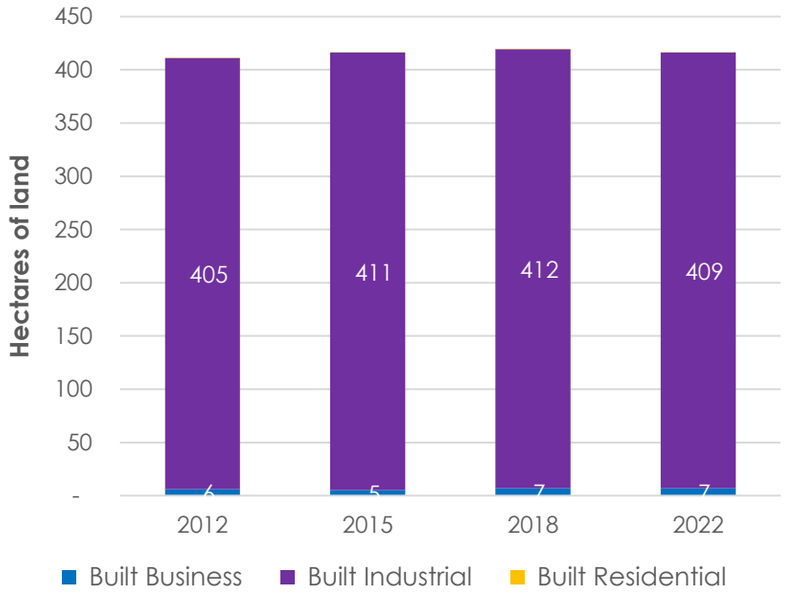
Source: City's DAMS (building plans and land use applications extract), General Valuation Roll.

URBAN LAND MARKETS

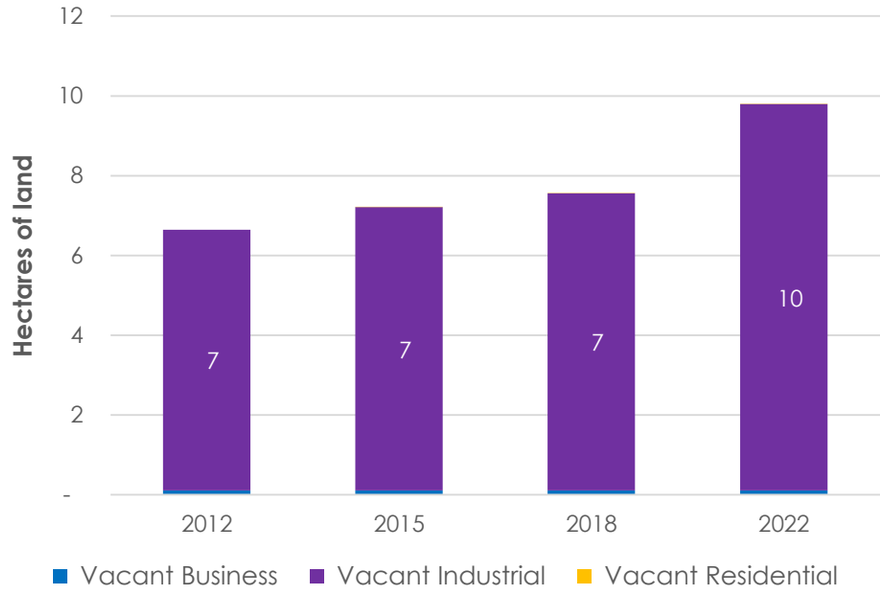
VACANT LAND ACROSS CAPE TOWN (GV 2022)



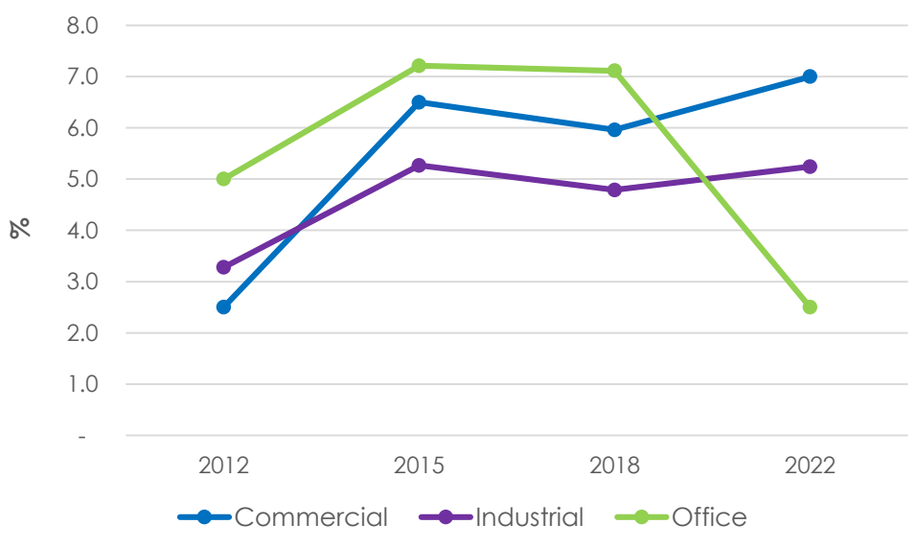
BUILT-UP LAND EXTENT BY SECTOR (TOTAL ERF EXTENT)



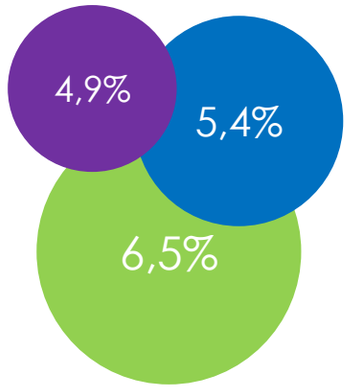
VACANT LAND EXTENT BY SECTOR (TOTAL ERF EXTENT)



VACANCY RATE OF EXISTING BUILDINGS



METRO AVERAGE: VACANCY RATES PER SECTOR FOR 2022



Number of land parcels that are vacant by size			
Erf Size	Commercial	Industrial	Residential
1) 1-250m²			1
2) 251-500m²			
3) 501-1000m²			
4) 1001-2500m²	1	1	
5) 2501-5000m²		2	
6) 5001-10000m²		7	
7) >10000m²		2	

Source: City's General Valuation Roll and Market Reports

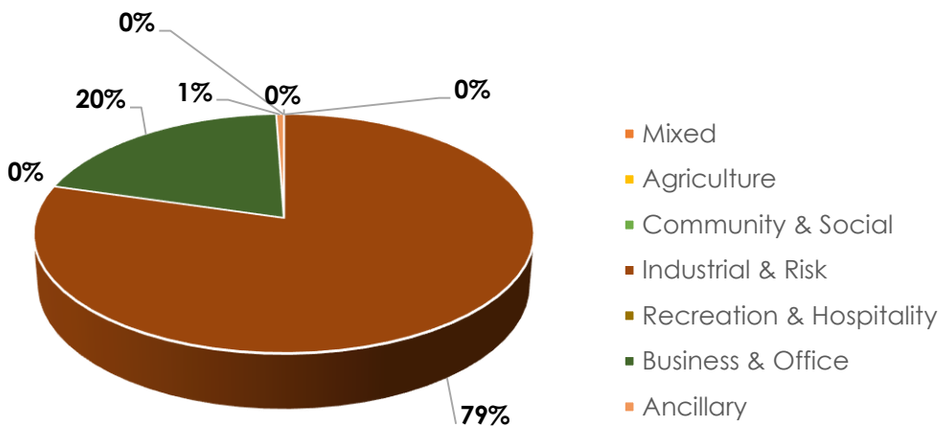
Vacant land:
The map provides a representation of the latest GV Roll (2022) by illustrating vacant land across the metropolitan area and supplements the graph on vacant land for the 2022 GV year. While the area has experienced a minimal growth in terms of the built-up land due to its maturity, additional vacant land has been created. Furthermore, the vacant land is further categorised based on the number and size of land parcels.

Vacancy rates:
In addition to vacant land, vacancy rates of existing buildings for the industrial sector ranged between 3,7% in 2012 to 5,2% in 2022. The commercial sector has increased from 2,5% in 2012 to 7% in 2022 whereas for the office sector, vacancy rates decreased from 5% in 2012 to 2,5% in 2022. The data suggesting that both industrial and office buildings are reasonably occupied while commercial as a higher vacancy rate.

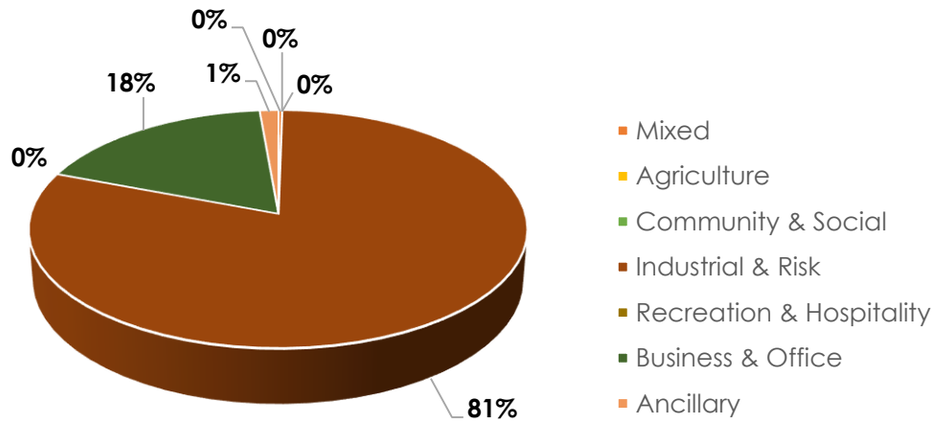
AGGLOMERATION OF INDUSTRIES

SECTORAL AGGLOMERATION AND CO-AGGLOMERATION RELATIONSHIPS

% OF LAND USE GROUPS (2012)



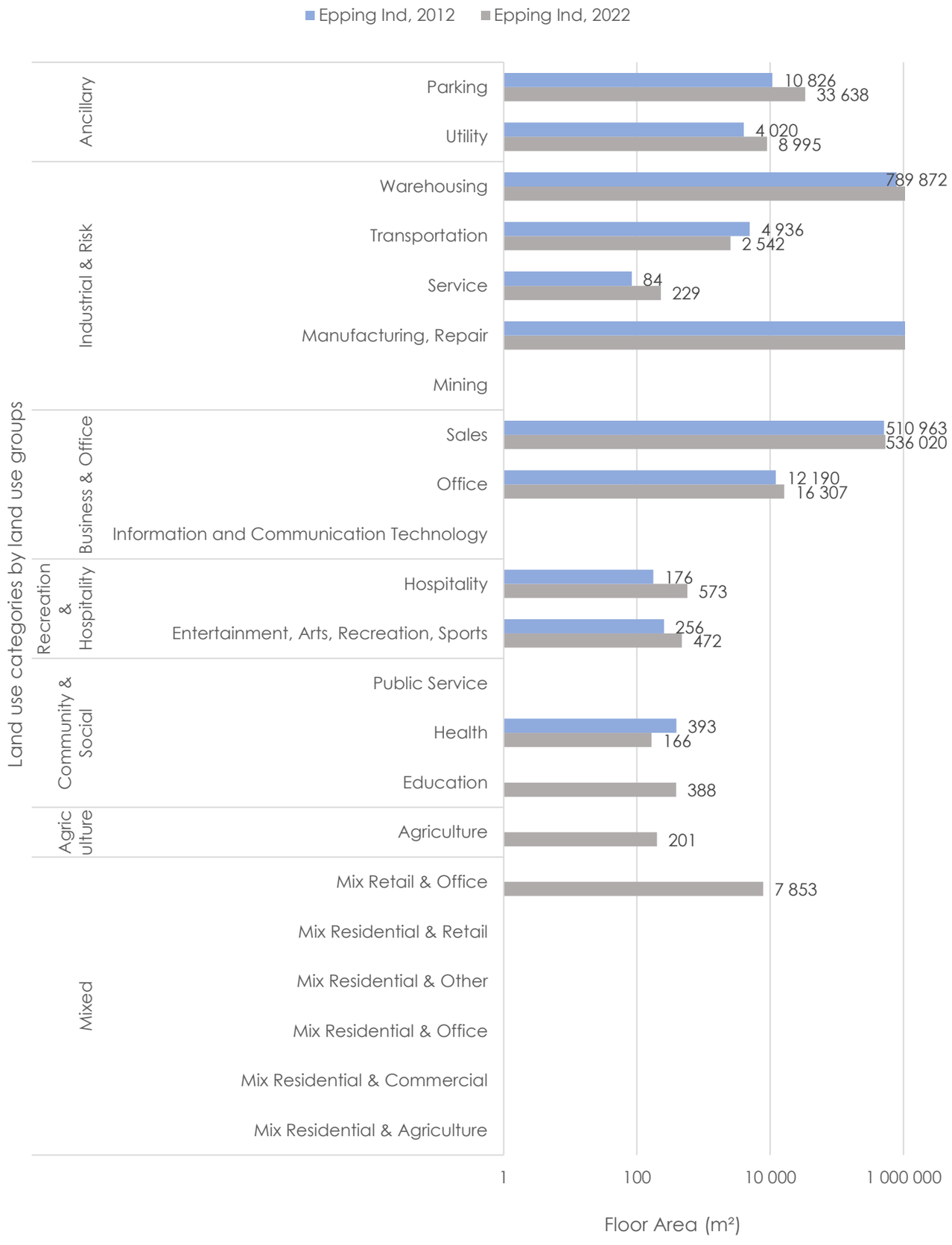
% OF LAND USE GROUPS (2022)



The pie charts represents the % split of land use groups agglomerated in Epping industrial. This % is based on the cumulative floor area (m²) across the various land uses and as can be seen by the chart, the Industrial & Risks group has been dominant in both 2012 and 2022 with a significant % of Business & Office group compared to the other groups which are mainly in support of the dominant land use groups.

Furthermore, the bar graph represents a comparative view between 2012 and 2022 on the co-agglomeration of land use categories within each of the land use groups. The area shows the most dominance between 2012 and 2022 for manufacturing and repairs exceeding 1 million m² in floor area. Warehousing has also tipped beyond the 1 million mark in 2022 with sales being one of the dominant land uses categories. The area also consists of other industrial and non-industrial land uses which is seen to be in support of the most dominant land uses.

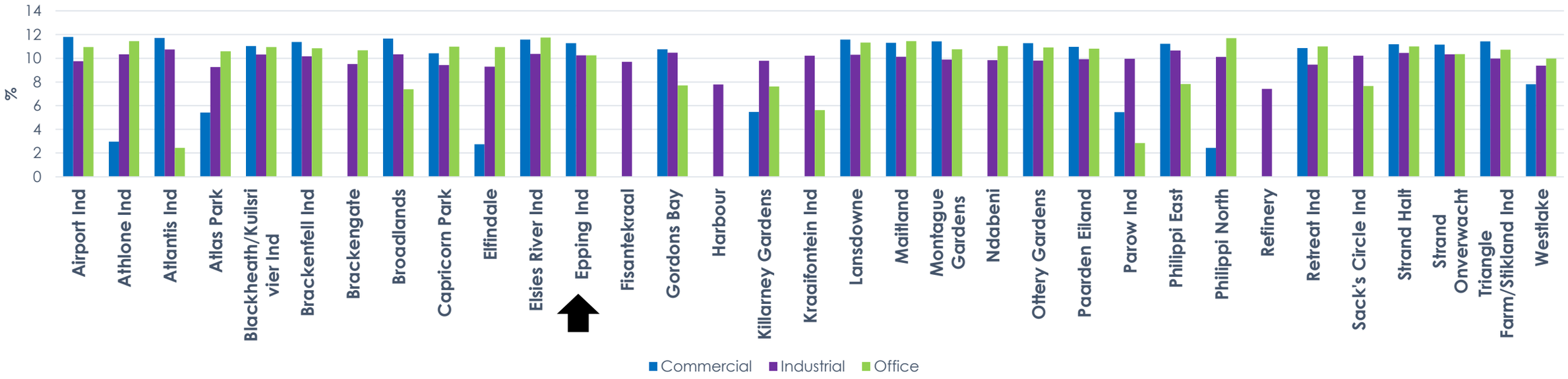
FLOOR AREA PER LAND USE CATEGORY FOR 2012 AND 2022



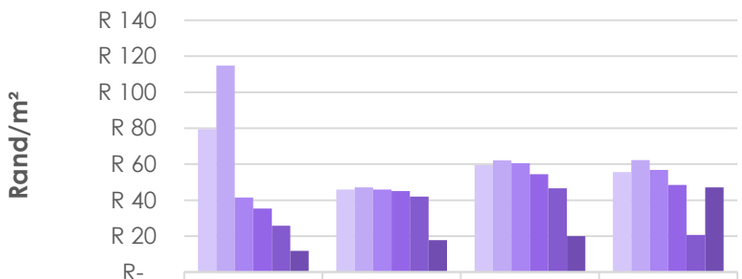
Source: Analysis of GV data (May 2024)

MARKET PERFORMANCE

AVERAGE CAPITALISATION RATE OF EPPING INDUSTRIAL IN RELATION TO OTHER INDUSTRIAL AREAS FOR THE PERIOD BETWEEN 2012 AND 2022

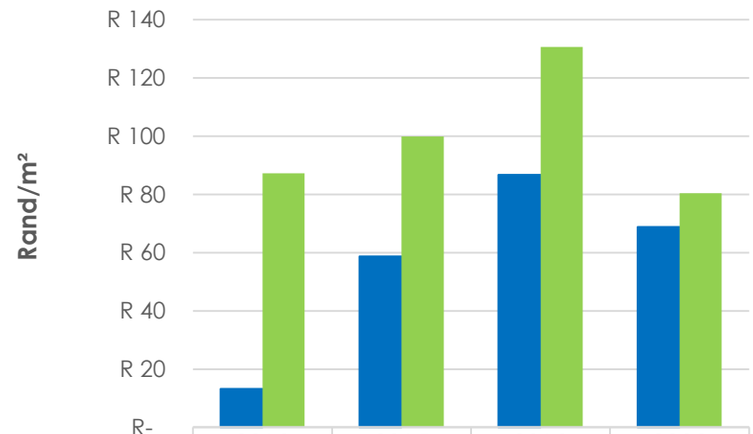


INDUSTRIAL RENTALS



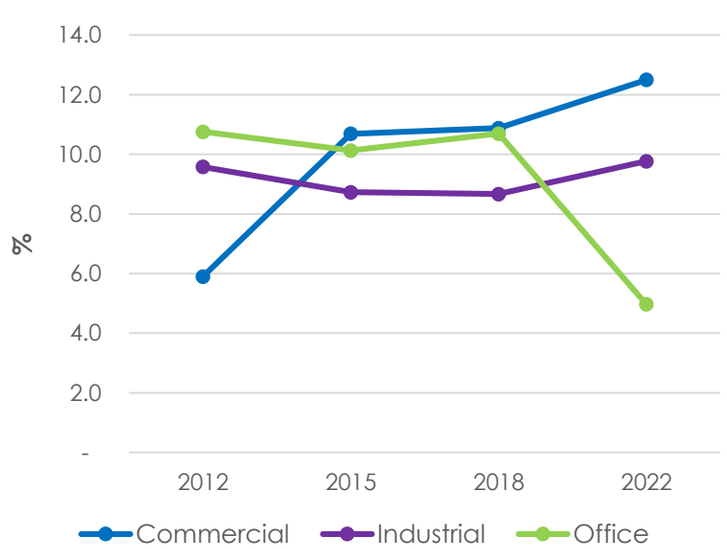
	2012	2015	2018	2022
1) 250m²	R 80	R 46	R 60	R 56
2) 500m²	R 115	R 47	R 62	R 62
3) 1000m²	R 41	R 46	R 61	R 57
4) 2500m²	R 35	R 45	R 55	R 48
5) 5000m²	R 26	R 42	R 47	R 21
6) 10000m²	R 12	R 18	R 20	R 47

COMMERCIAL AND OFFICE RENTALS



	2012	2015	2018	2022
Commercial	R 13	R 59	R 87	R 69
Office	R 87	R 100	R 131	R 80

CAPITALISATION RATES



Rental rates:
Rental rates across property sizes has gradually increased between 2012 and 2022 with significant increase experienced within property sizes larger than 10 000m² indicating demand.

Both office and commercial rentals gradually increased between 2012 and 2018 and dropped significantly in 2022.

Comparative view on cap rates:
The average capitalisation rate between 2012 and 2022 for industrial, office and commercial sectors has been 10,24%, 10,25% and 11,27% respectively and further indicating its competitiveness relative to other industrial areas.

Year on year cap rates for the industrial sector has been consistent at around the 10% mark while the office sector has decreased from 10,8% to 5% in 2022. The commercial sector's cap rate increased from 5,9% in 2012 to 12,5% in 2022.

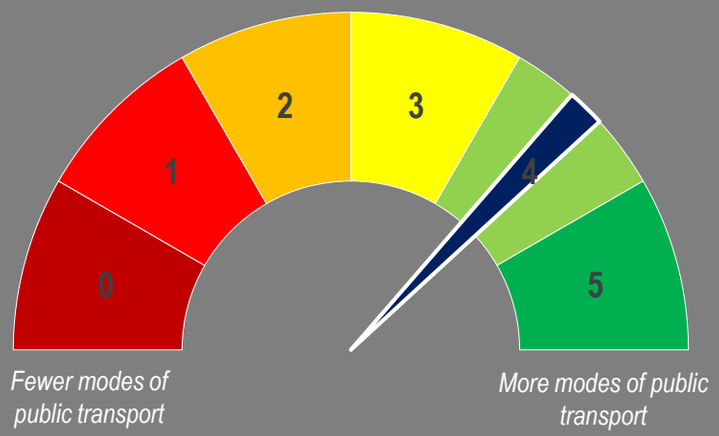
- *Higher cap rates = higher investment risk.*
- *Lower cap rates = lower investment risk.*

Source: 2012 – 2022 market reports

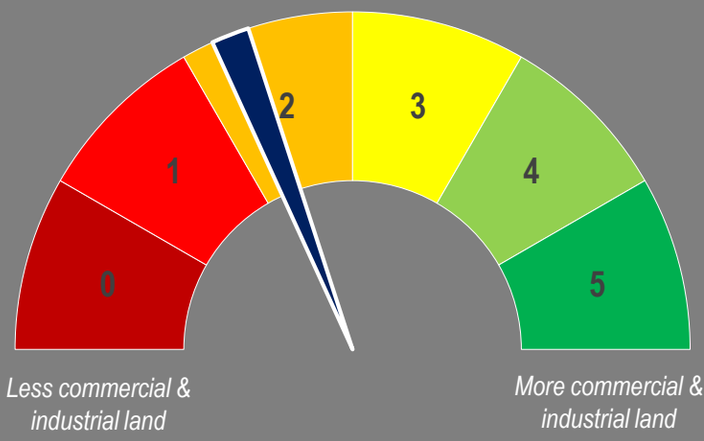
FINDINGS – Provisional

Potential:

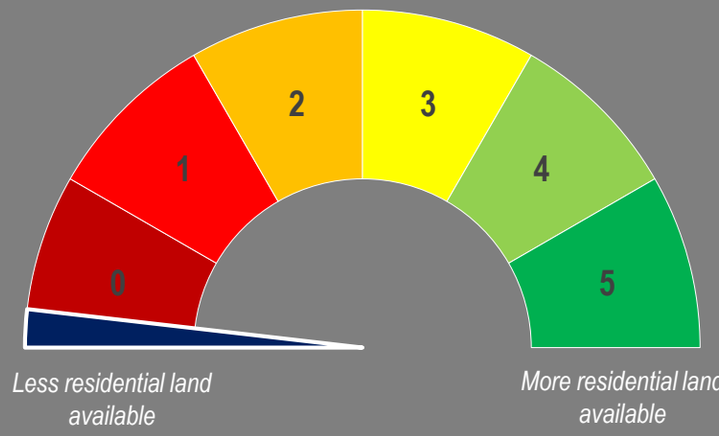
PROXIMITY TO PUBLIC TRANSPORT



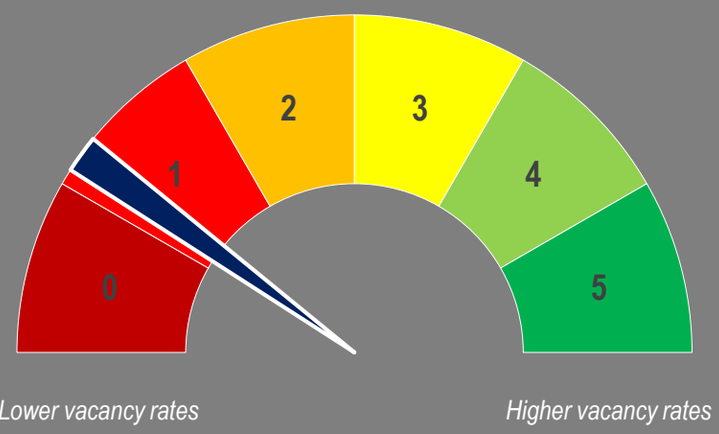
VACANT NON RESIDENTIAL LAND



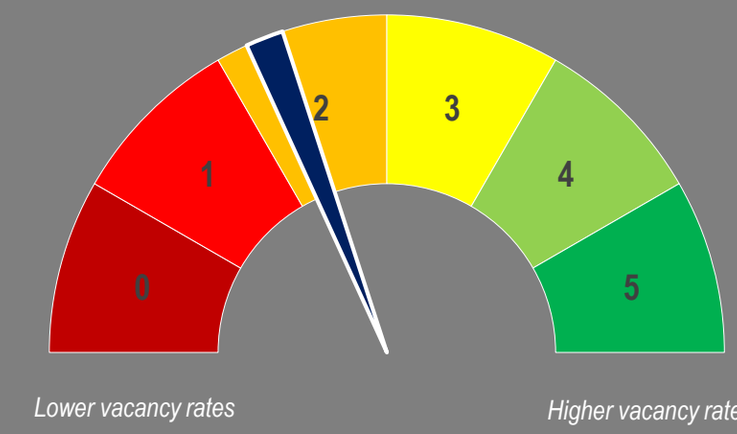
VACANT RESIDENTIAL LAND



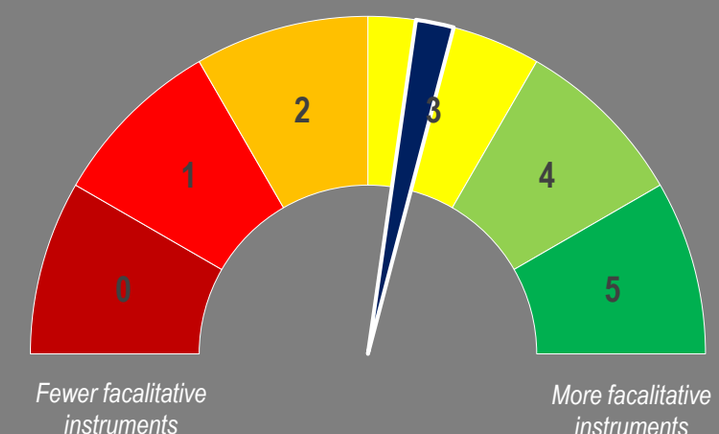
COMMERCIAL BUILDING VACANCY RATE



INDUSTRIAL BUILDING VACANCY RATE



INCENTIVES AND PRECINCT MANAGEMENT



Performance: Information pending and under development

END

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD