SPATIAL TRENDS & IMPLEMENTATION TRACKING

DATA, MONITORING & EVALUATION REPORT

DEPARTMENT: **URBAN PLANNING AND DESIGN**

PUBLICATION: **3.0 - JUNE 2025**

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

Making progress possible. Together.

ACKNOWLEDGEMENTS

Director: Urban Planning and Design (UPD)

Erika Naude

Drafters (UPD M&E team)

Metropolitan Spatial Planning and Growth Management:
Jaco Petzer, Amalia Pugnalin, Louis Welgemoed, Annelise de Bruin, Nosiphe Mnyazi and Tanya Kieswetter
Spatial Targeting and Mechanisms:
Vernon Moonsamy, Michael Brooke, Ross Jacobs and Esethu Bacela

Contributing Drafters (External Line Departments)

Jonothan Bell (Environmental Management)
Harriet Clift (Heritage Management)

Contributing Drafters (District Spatial Planning)

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

OP&M Support (Theory of Change and Logic Model)

Zayaan Noordien and Ameen Benjamin

Data contributors

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

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

EDITORS' NOTE

Scope of the 2025 Review

The Spatial Trend Report provides a comprehensive overview of the land use patterns and emerging trends in Cape Town. Our goal is to deliver year-on-year analysis and refine key panels, ensuring the most accurate and up-to-date insights that current data allows. Each year, we also include special features to highlight noteworthy spatial trends.

The 2025 Review serves as a supplementary update to last year's report. Some of our key data sources are not updated annually and are currently between update cycles. The previous edition (2024 V2.0) represented a major revision, with nearly all panels undergoing a full review. A notable advancement introduced in that edition was the integration of consistently analysed General Valuation (GV) roll data spanning 2012 to 2022. This methodological improvement strengthens accuracy and reliability by applying uniform classification categories and points of departure across all GV years - ensuring a consistent and comparable analytical framework. Panels that rely on GV data will not be updated again until the formal release of the 2025 GV Roll.

New additions and revisions

This year's report includes new panels focusing on heritage mechanisms and protections, compiled in collaboration with the Environmental and Heritage Management Branch. Biodiversity-related panels have also been fully revised with assistance from the Biodiversity Management Branch. Both sets of panels are available in Section B of the report.

Updated Panels

The following panels were revised to capture/reflect the latest available data sources:

- Change in Urban Extent
- Biodiversity Network
- Environmental Impact Assessments
- Building Plans Submissions, Approvals, Commencements and Completions
- Take-up of New Development Areas (NDAs)
- Government Subsidised Housing
- Spatial Alignment of Capital Expenditure
- Progress on Urban Restructuring and Upgrading Projects
- Progress on prioritised Local Area Planning Initiatives (LAPIs)
- Progress on implementation of development mechanisms/incentives

All updated panels are flagged in the top-right corner for easy identification.

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

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 end of the 2025/2026 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.

MONITORING AND EVALUATION FRAMEWORK

CONTENT

INTRODUCTION

Key terms and definitions
Abbreviations and acronyms
Purpose of the report, data sources, assumptions and limitations
Theory of change, logic model and review framework
User guide

PART 1: SPATIAL TRENDS REPORT

A. URBAN EXTENT
1. Urban footprint and urban extent (2025 Update)

B. NATURAL, AGRICULTURAL AND HERITAGE ASSETS
1. Biodiversity network (2025 Update)
2. Early detection – EIAs (2025 Update)
3. Areas of agricultural significance
4. Heritage Protection (2025 - New Panel)

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 (2025 Update)
   a. Residential buildings (formal) (2025 Update)
   b. Non-residential buildings (commercial) (2025 Update)
   c. Non-residential buildings (industrial) (2025 Update)
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) (2025 Update)
   a. Overall Trend (2025 Update)
   b. Residential NDAs (2025 Update)
   c. Mixed use NDAs (2025 Update)
   d. Non-residential NDAs (2025 Update)
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 (2025 Update)
2. Capital investments: City projects (2025 Update)
3. Progress on Urban Restructuring and Upgrading Projects (2025 Update)
4. Progress on prioritised Local Area Planning Initiatives (LAPIs) (2025 Update)

G: PROGRESS ON DEVELOPMENT MECHANISMS / INCENTIVES
1. Progress on implementation of development mechanisms/incentives (2025 Update)
   a. Heritage exemptions (2025 - New Panel)
   b. Urban Development Zone: Uptake

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
GLA	Gross Leasable Area
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

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

INTRODUCTION

Purpose of this report

This report is a supplementary update to the June 2024 Spatial Trends Report. It includes several new or revised panels, indicated by a symbol in the top-right corner of each updated panel.

Reviewed annually, the report tracks year-to-year changes based on available data. Its purpose is to provide an overview of land-use development trends and changes 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 helps gauge the impact of spatial plans on the city's development and growth. The datasets can be used to reflect, compare, and monitor land development trends over time, enabling 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 presents enriched land-use data linked to indicators derived from MSDF and DSDF policy objectives. Most data is sourced at the property (cadastral) level and aggregated for analysis at various planning scales—metropolitan, district, local area, precinct, or site—over different time periods to ensure versatility.

Data sources, assumptions and limitations

Data was sourced from various City departments relevant to the indicators monitored. Key sources include the General Valuation (GV) Roll, Development Application Management System (DAMS), Biodiversity Network (BioNet), agricultural areas of significance, New Development Areas (NDAs), and the Undeveloped and Partially Developed Land Inventory (UPDLI).

While every effort has been made to reflect the most recent trends, datasets are not aligned to the same reporting year due to varying update cycles. Indicators reflect historic trends based on the most current data available at the time of compilation. References are included in each panel for transparency.

The limitations of the report

Data availability limits comprehensive reporting on all spatial policy objectives, particularly those related to the informal economy. Infrequent updates of source datasets complicate comparisons within the same time period. For example, the GV Roll is updated every three years, while building plan approvals are updated continuously, making direct comparisons challenging.

Disclaimer:

The information provided is for general guidance only and is not intended to offer definitive answers. While we strive to ensure accuracy and reliability, we make no warranties regarding completeness or suitability for any purpose.

Any reliance on this 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.

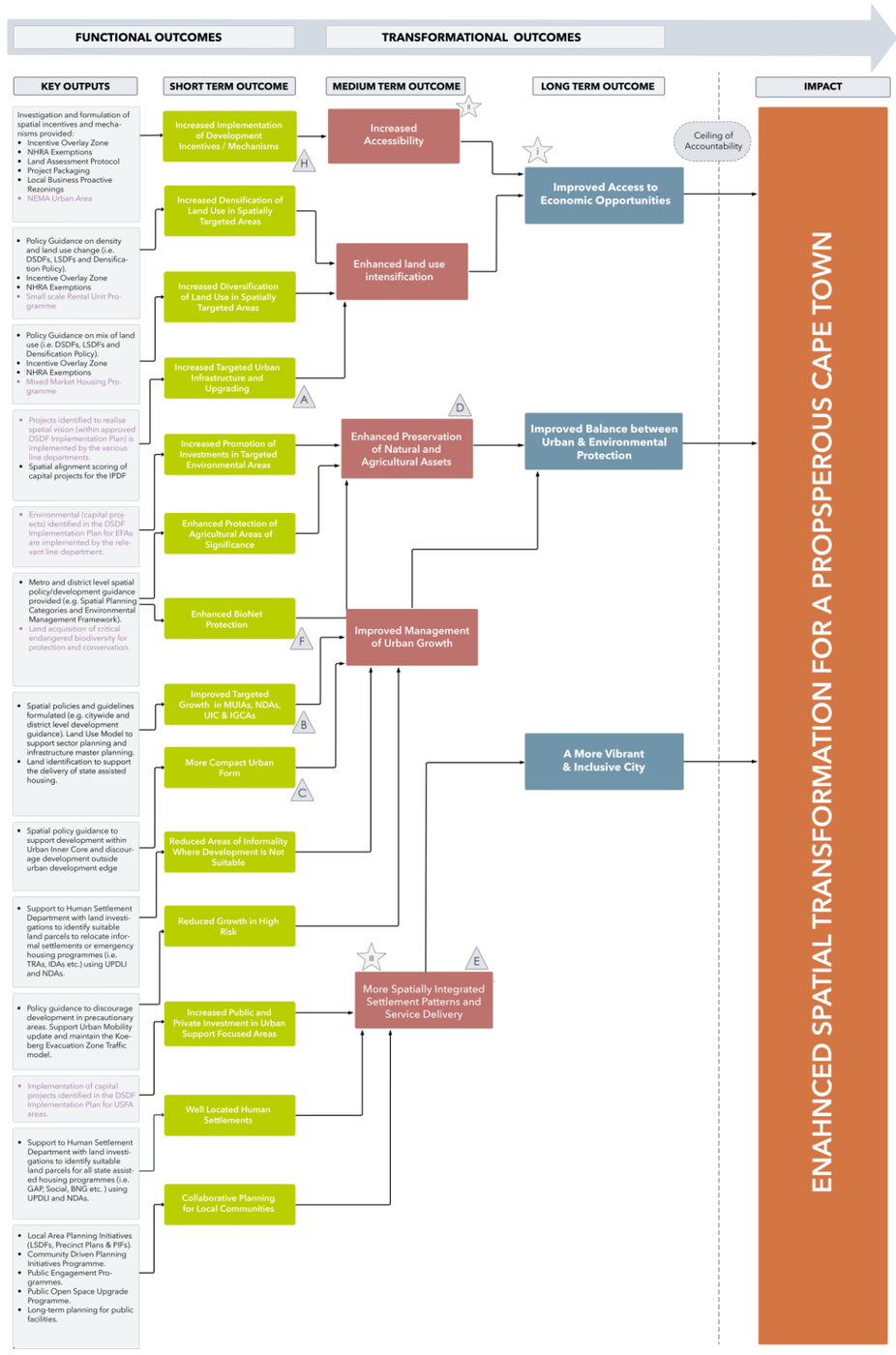
EXTERNAL/RISK FACTORS

- 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

- Assumption
- 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.

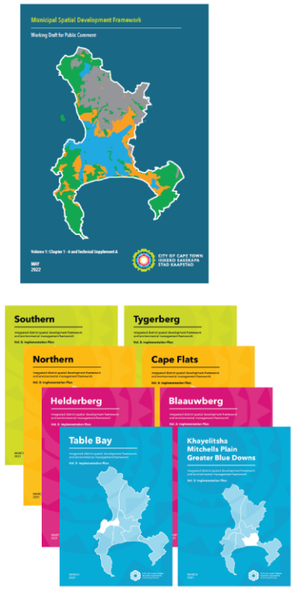
REVIEW

How?

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

OUTPUT:
Spatial Trends & Implementation Tracking Report

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

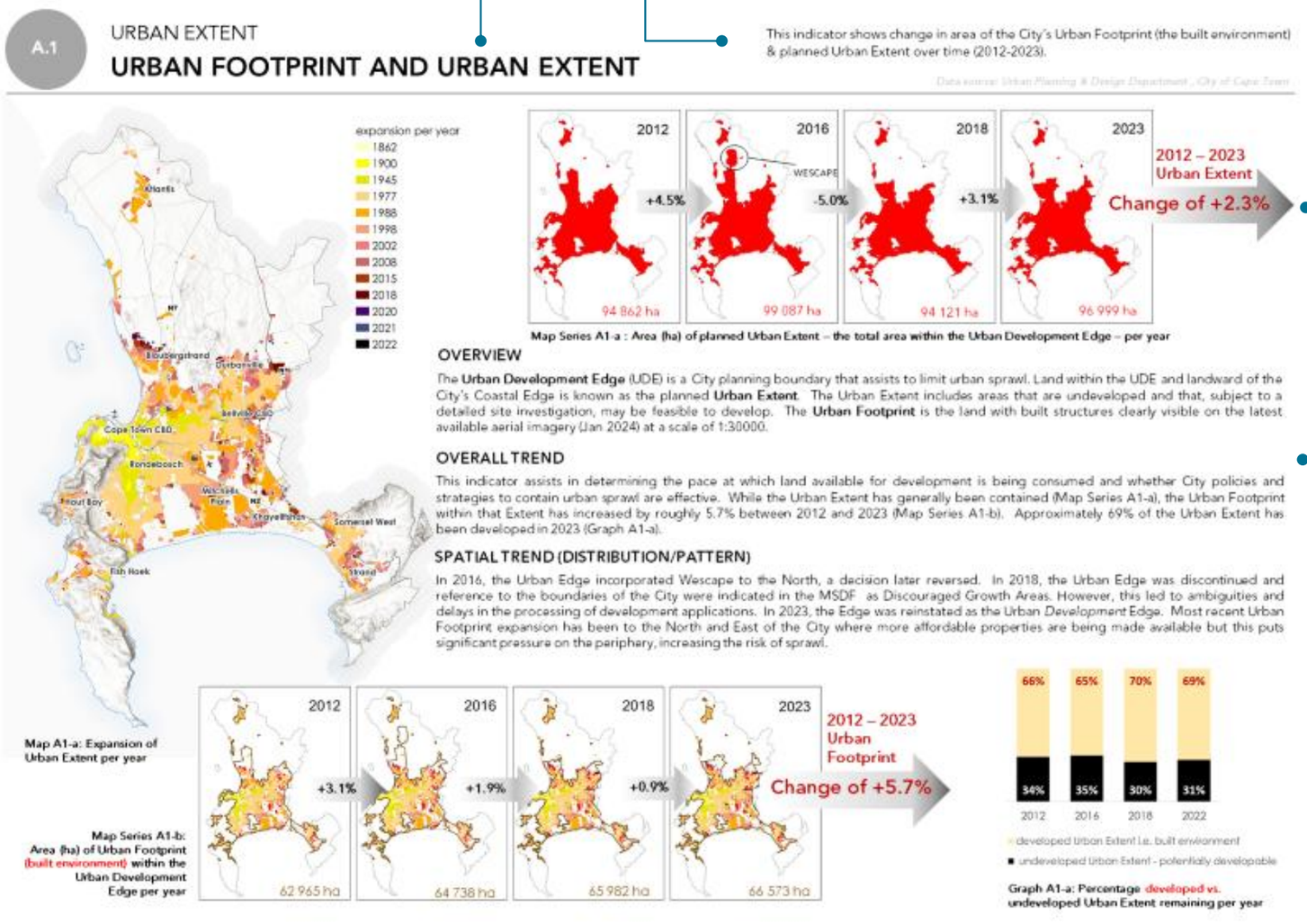
HOW TO INTERPRET THE COMPONENTS OF INFORMATION FOR EACH INDICATOR PANEL

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

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

A — Urban Extent
Indicators: A1

B — Natural, Agricultural and Heritage Assets
Indicators: B1, B2, B3 & B4

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

PART 1: SPATIAL TRENDS REPORT

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

A : URBAN EXTENT

A1 : Urban footprint and urban extent (2025 Update)

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

A.1

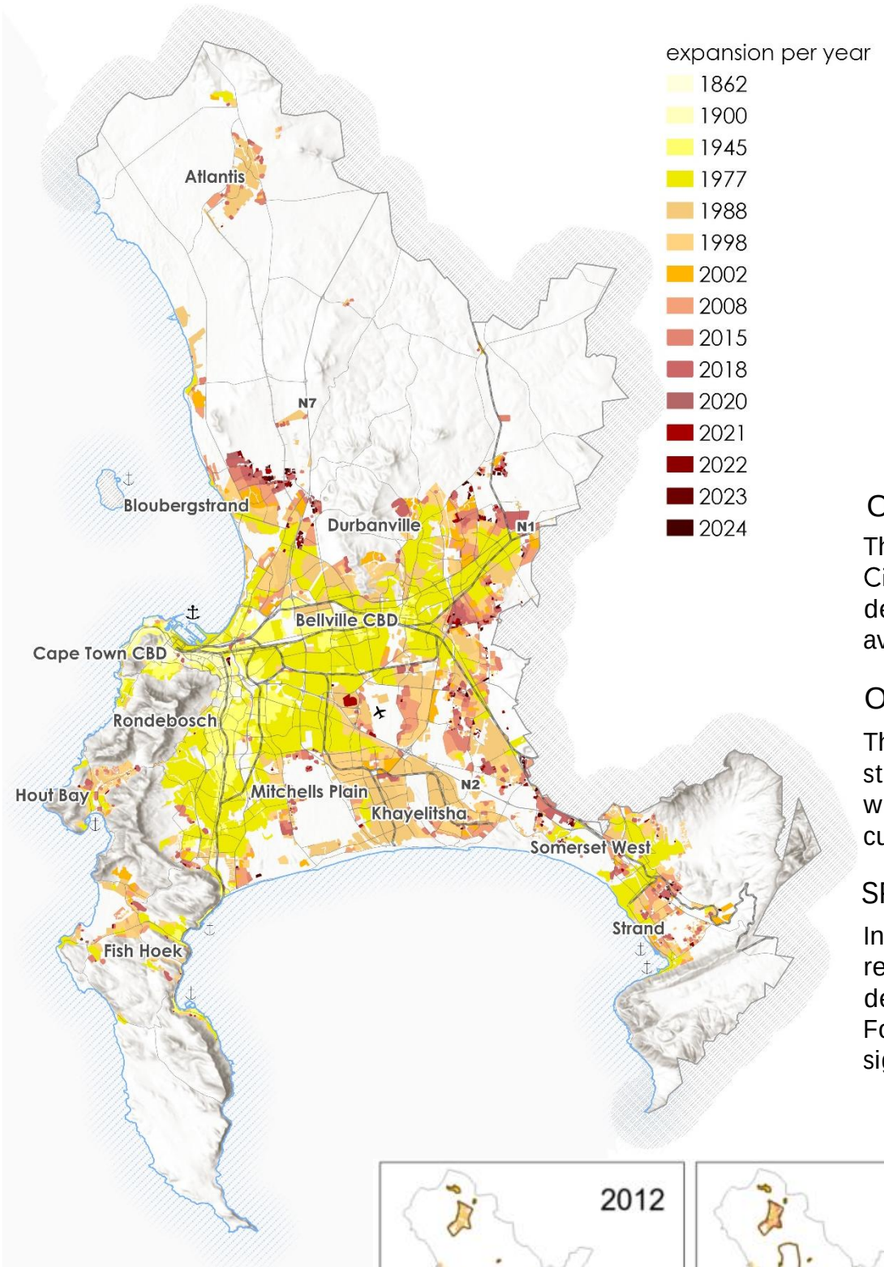
URBAN EXTENT

URBAN FOOTPRINT AND URBAN EXTENT

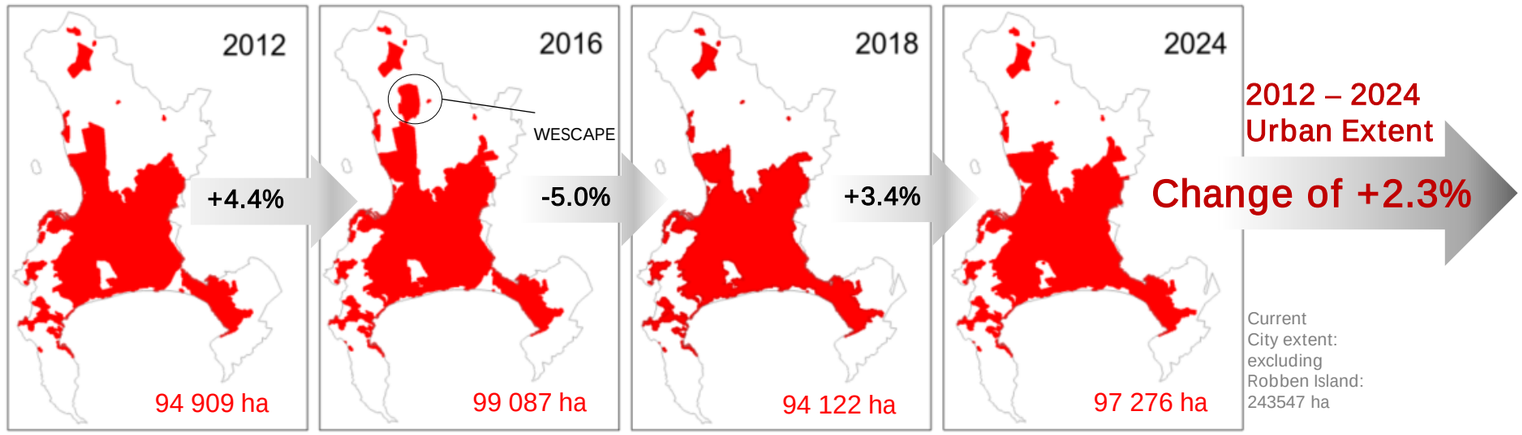
2025 Update

This indicator shows change in area of the City's Urban Footprint i.e. the built environment (2012-2024) & planned Urban Extent over time (2012-2024).

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

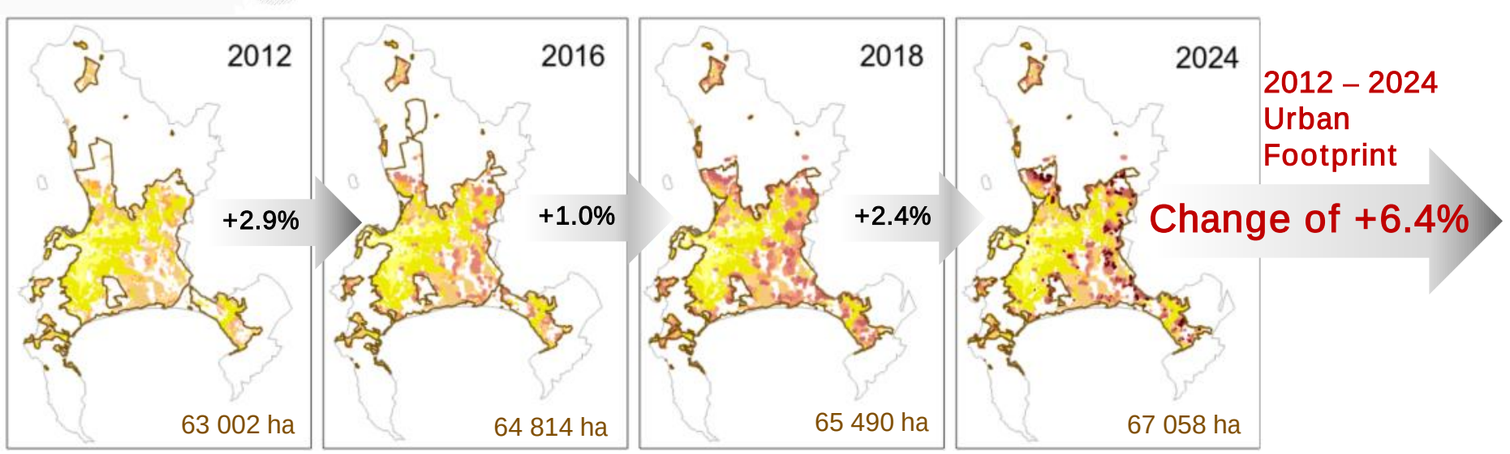
The **Urban Development Edge** (UDE) is a City planning boundary that assists to limit urban sprawl. Land within the UDE and landward of the City's Coastal Edge is known as the planned **Urban Extent**. The Urban Extent includes areas that are undeveloped and that, subject to a detailed site investigation, may be feasible to develop. The 2024 **Urban Footprint** is the land with built structures clearly visible on the latest available aerial imagery (Jan 2025) at a scale of 1:30000.

OVERALL TREND

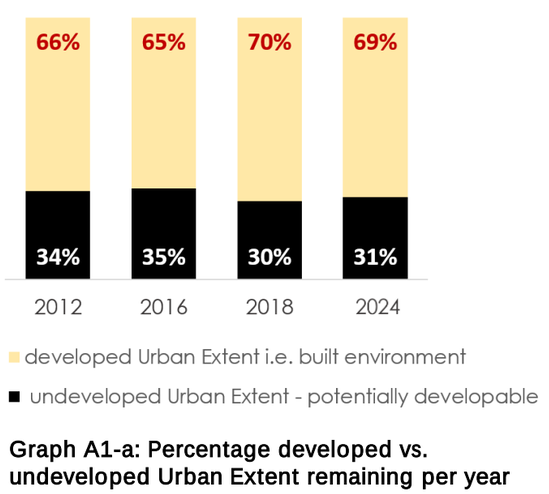
This indicator assists in determining the pace at which land available for development is being consumed and whether City policies and strategies to contain urban sprawl are effective. While the Urban Extent has generally been contained (Map Series A1-a), the Urban Footprint within that Extent has increased by roughly 6.4% between 2012 and 2024 (Map Series A1-b). Approximately 69% of the Urban Extent has currently been developed (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

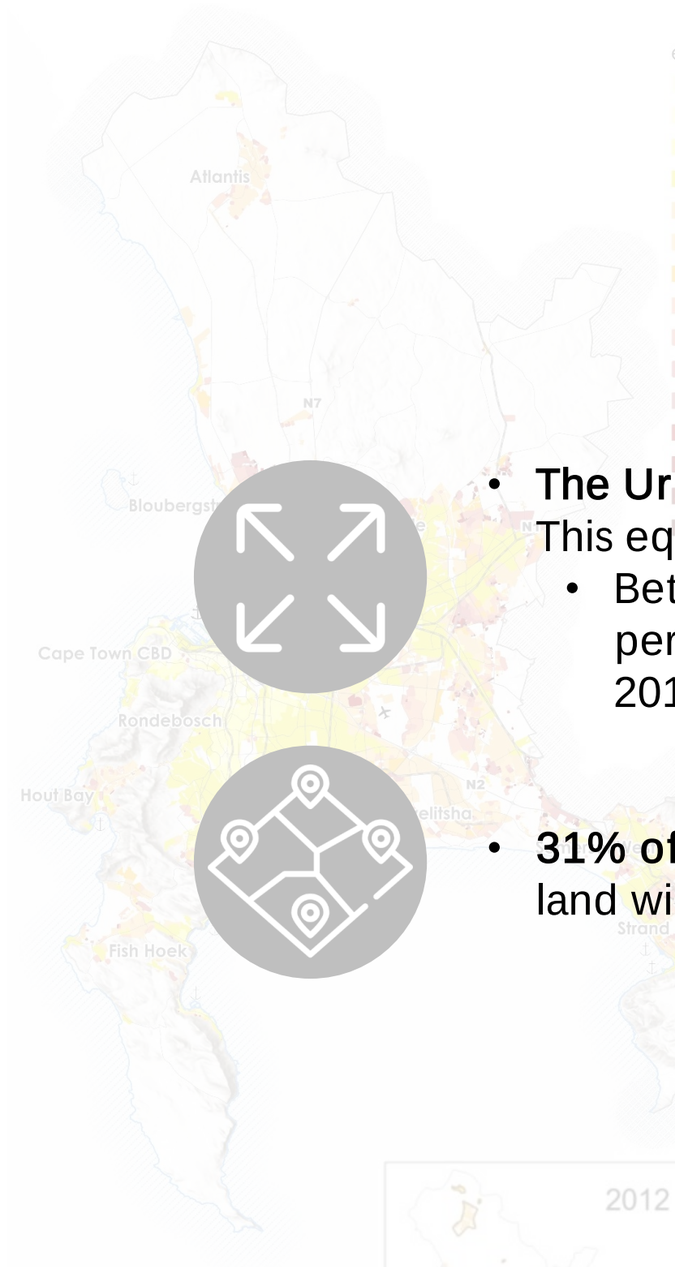


Graph A1-a: Percentage developed vs. undeveloped Urban Extent remaining per year

A.1

URBAN EXTENT

KEY TAKE-AWAY TRENDS



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

- **The Urban Footprint (built environment) grew by 4056 ha between 2012-2024.**

This equates to 18 x Century Cities.

- Between 2018 and 2024 the urban footprint expanded by 1568 ha, or 261.3 ha per annum, which is slightly lower than the rate of increase between 2016 and 2018 of 338 ha per annum.

- **31% of land inside the Urban Development Edge remains undeveloped** i.e. the land within the Urban Extent that is potentially developable as of 2024.

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

B : NATURAL, AGRICULTURAL AND HERITAGE ASSETS

B1 : Biodiversity network (2025 Update)

B2 : Early detection - EIAs (2025 Update)

B3 : Areas of agricultural significance

B4 : Heritage Protection (2025 New)

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

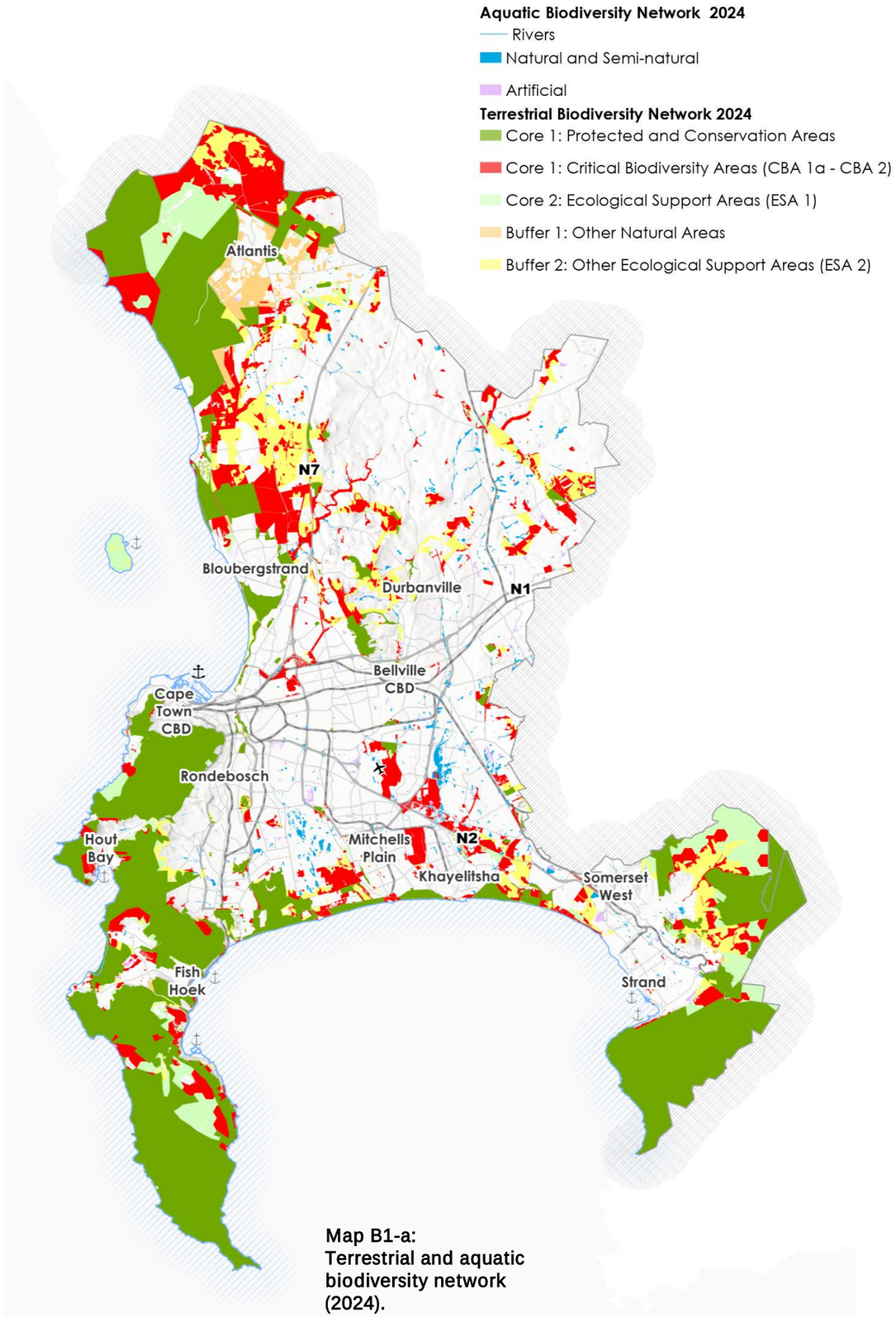
B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

This indicator shows the change in the extent of the terrestrial biodiversity network over time (2009-2024).

Source: Biodiversity Management, Environmental Management, City of Cape Town



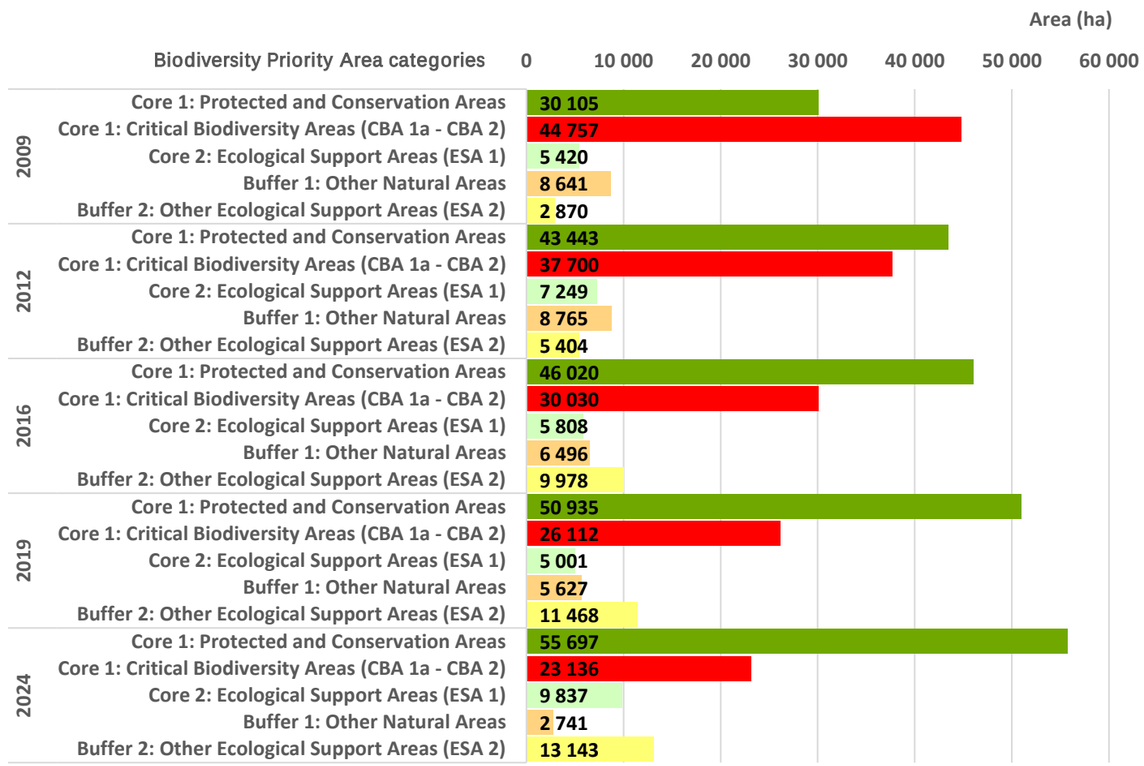
Map B1-a:
Terrestrial and aquatic biodiversity network (2024).

OVERVIEW

The terrestrial biodiversity network (BioNet; Map B1-a) is a network of the remaining indigenous vegetation in the city, classified into Biodiversity Priority Area categories that prioritise the conservation significance of each remnant. The classification is the result of a systematic scientific analysis conducted periodically that takes into account many factors such as the national biodiversity targets, presence of threatened species, and the least conflict with other land uses. The aquatic component of the BioNet comprises of the rivers and wetlands. Securing and managing biodiversity priority area sites across the BioNet is essential to ensure species survival, resilience to climate change, critical ecosystem functioning and the sustainability of Cape Town. BioNet core areas are included as critical natural assets in the City's Municipal Spatial Development Framework (MSDF).

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 tracks the rate at which habitat is being protected via proclamation and/or on-site management. The overall trend is that since 2009, the total Biodiversity Priority Areas of the BioNet increased from 91 793 ha to 104 554 ha by 2024, reflecting expanded conservation efforts. However, the extent of Core 1: Critical Biodiversity Areas and remaining indigenous vegetation has declined, and Buffer 1 areas have significantly reduced as they were either developed or prioritised as core areas due to limited habitat conservation options (Graph B1-a). The protected and conservation area category includes large waterbodies, as well as small developed areas for visitor amenities without remnant vegetation. Also, the growing Buffer 2 category is largely agricultural land.



Graph B1-a: Extent (ha) of total biodiversity network between 2009 (baseline) and 2024 (current) – includes both core & buffer areas. Note: Statistics may vary slightly at times due to different methods of geoprocessing used.

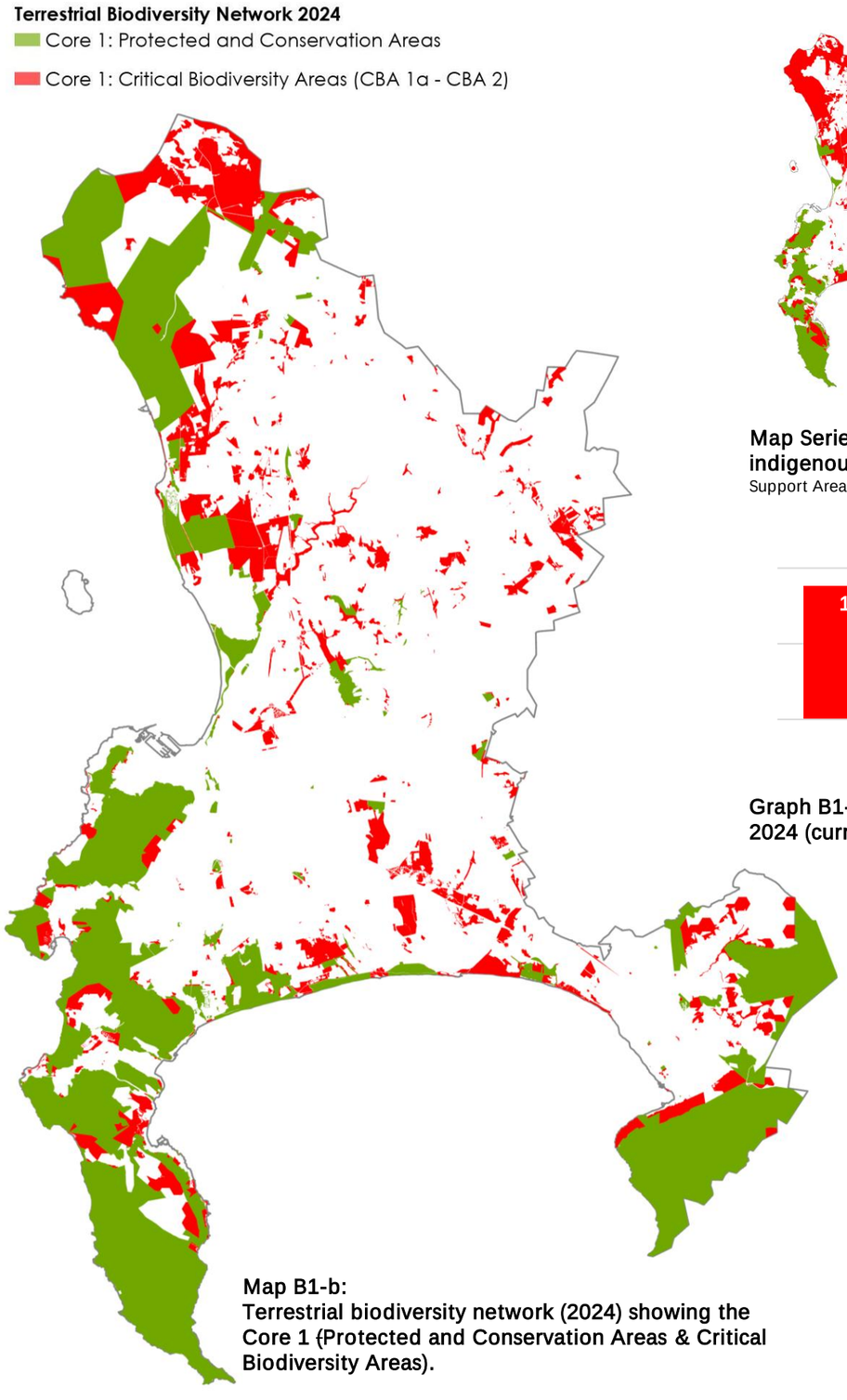
B.1

NATURAL AND AGRICULTURAL ASSETS

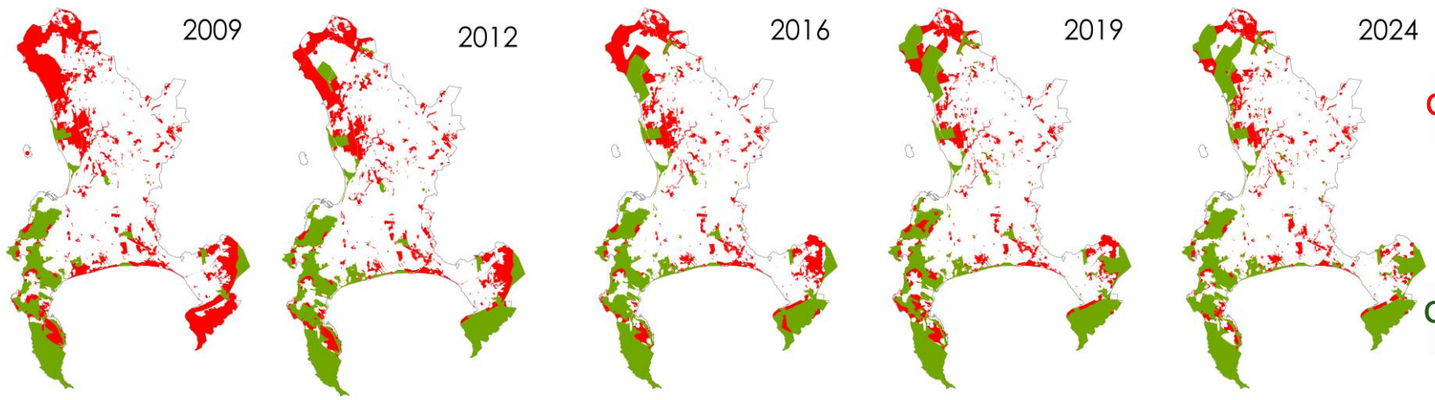
BIODIVERSITY NETWORK

This indicator focuses on the change in the extent of the core terrestrial biodiversity network over time (2009-2024).

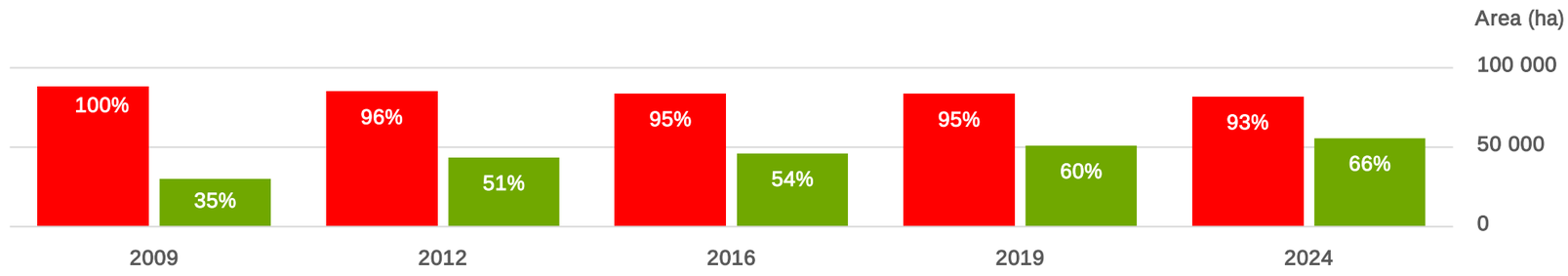
Source: Biodiversity Management, Environmental Management, City of Cape Town



Map B1-b:
Terrestrial biodiversity network (2024) showing the Core 1 {Protected and Conservation Areas & Critical Biodiversity Areas).



Map Series B1-a: Change in protected and conservation areas and change in core biodiversity network areas (CBA 1-2) i.e. the prioritised remnants of indigenous vegetation between 2009 and 2024. Note: Only Core 1 areas shown above. Biodiversity network Core 2 (ESA 1), Buffer 1 (Other Natural Areas) and Buffer 2 (Other Ecological Support Areas) areas are not shown above.



Graph B1-b: Area (ha) and percentage of the core biodiversity network (Core 1: Protected and Conservation Areas & CBA 1-2) between 2009 (baseline) and 2024 (current).

OVERVIEW

Map series B1-a shows the Core 1 Biodiversity Network (BioNet) areas - Protected and Conservation Areas & Critical Biodiversity Areas (CBA 1a-c and CBA 2) - that are required to meet national biodiversity targets. CBAs are indigenous vegetation remnants that have been prioritised for conservation. Core 1 areas are included as critical natural assets in the City's Municipal Spatial Development Framework (MSDF) [see indicator C.2a].

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 tracks the rate at which habitat is being protected via proclamation and/or on-site management. The overall trend is a loss of 7% core BioNet between 2009 and 2024. However, there was a 31% increase in the extent of BioNet that is protected and/or conserved (see Map Series B1-a and Graph B1-b).

B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

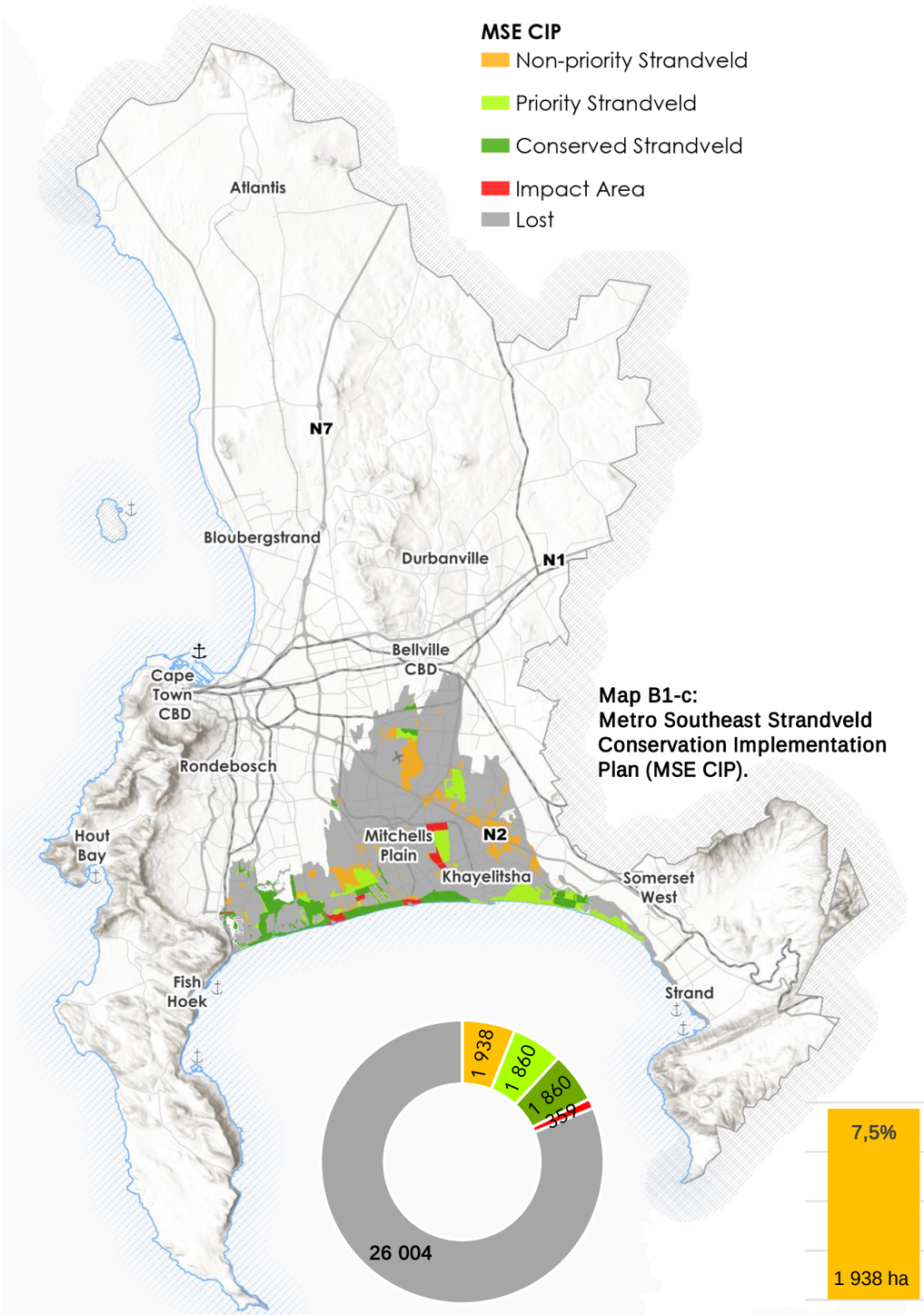
2025 Update

This indicator summarises the Metro Southeast Strandveld Conservation Implementation Plan (MSE CIP) and highlights focal areas of interest where significant gains made in the proclamation and conservation of the Biodiversity Priority Areas of the Biodiversity Network (BioNet).

Source: Biodiversity Management, Environmental Management, City of Cape Town

SPATIAL TREND (DISTRIBUTION/PATTERN)

In the southeast of the city, the Metro Southeast Strandveld Conservation Implementation Plan (MSE CIP) focusses on securing a defendable protected area network in a region with many competing needs and pressures (Map B1-c). The local Strandveld vegetation subtype is found nowhere else in the world. Of the historic extent (26 004 ha), only 23% (6 017 ha) of this vegetation subtype remains (Map B1-c, Graph B1-c). Of this, 7,5% has been identified as non-priority where development can be considered, while 7,2% has been proactively identified as priority for conservation, and an additional 7,2% is already formally protected and conserved (Map B1-c , Graphs B1-c and B1-d). Notably, 1,4% of the remaining historical extent is considered as impact area - a priority for both conservation and development (Map B1-c , Graphs B1-c and B1-d).



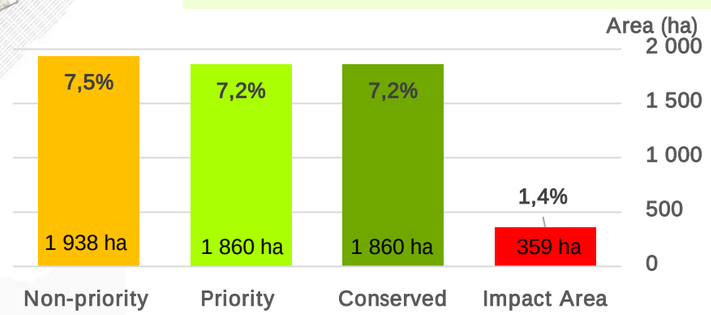
Map B1-c:
Metro Southeast Strandveld Conservation Implementation Plan (MSE CIP).

Graph B1-c: Area (ha) of historic and current Strandveld vegetation as per the MSE CIP.

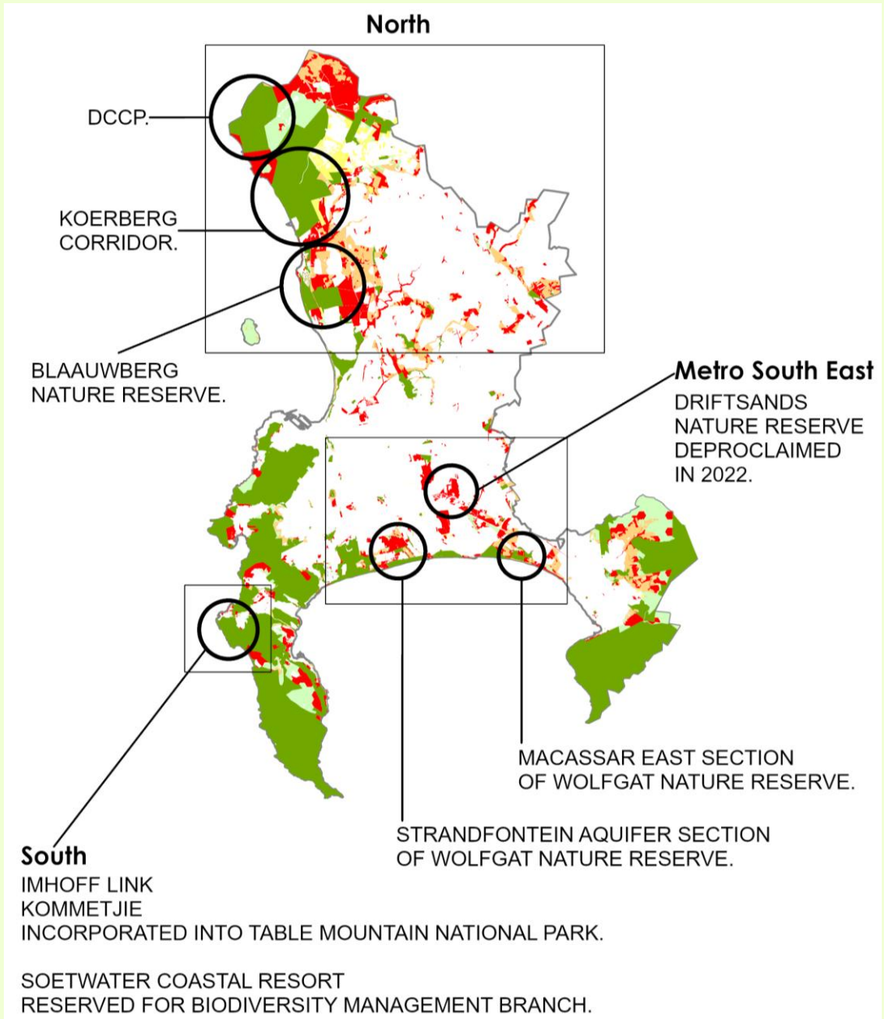
SPATIAL TREND (DISTRIBUTION/PATTERN)

Map B1-d highlights key focal areas that have experienced significant change in terms of the Biodiversity Network. Since 2009, large areas to the north of the city have been proclaimed, much of which overlay core biosphere and aquifer protection resource zones. These gains have been facilitated by programs such as the Atlantis Conservation Land Bank. The incorporation of the Macassar East and Strandfontein Aquifer Sections of Wolfgat Nature Reserve (Map B1-d) into the protected area network assists with key protected area connectivity along the False Bay coast. Similarly, incorporation of the Imhoff Link into Table Mountain National Park (TMNP) and reserving the Soetwater Coastal Resort Section add to the ecological connectivity and ecosystem functioning of TMNP (Map B1-d).

However, CapeNature's Driftsands Nature Reserve was deproclaimed in 2022, contributing to both protected area and core biodiversity area loss.



Graph B1-d: Area (ha) and percentage of remaining Strandveld vegetation as per MSE CIP.



Map B1-d: Focal areas of interest.

B.1

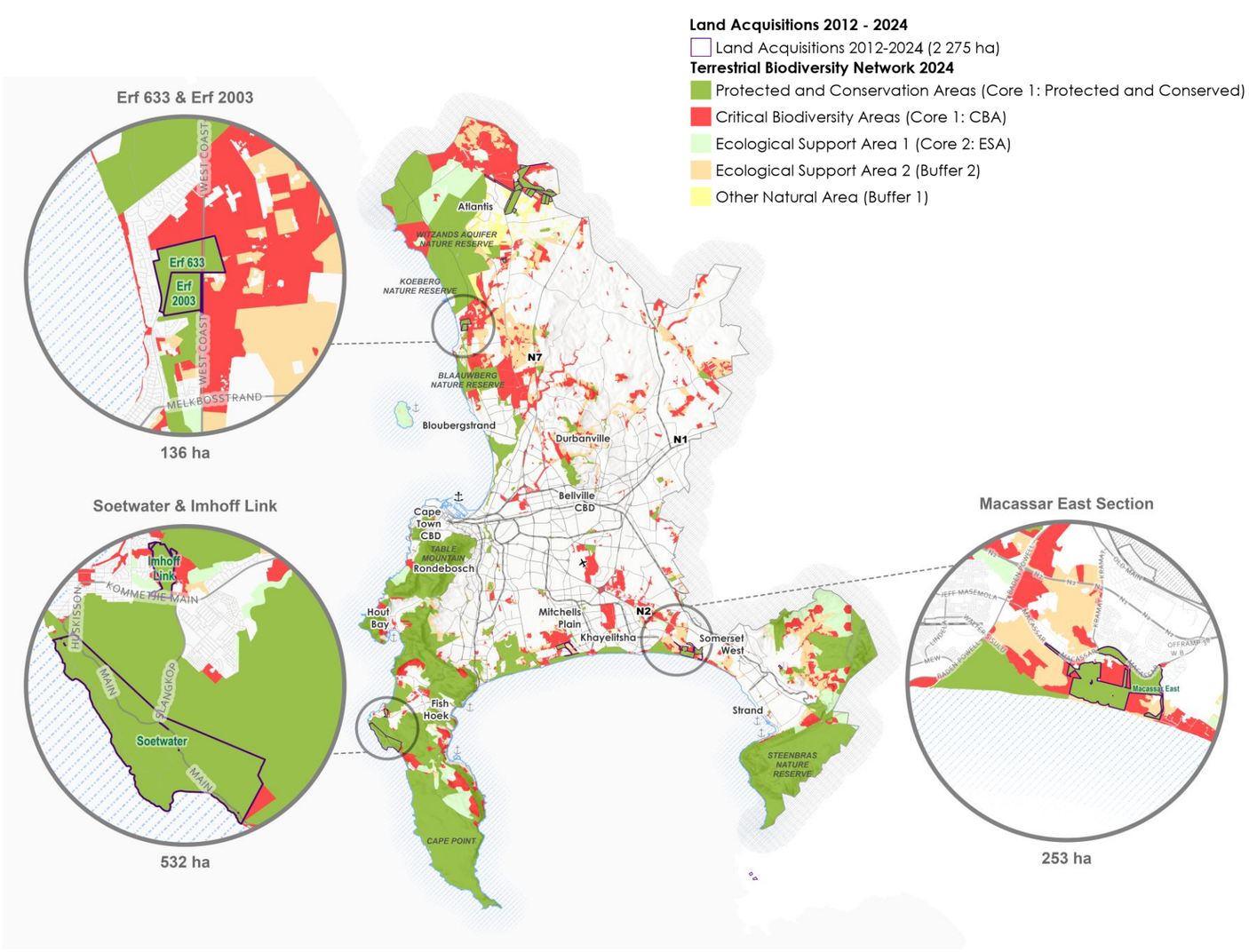
NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

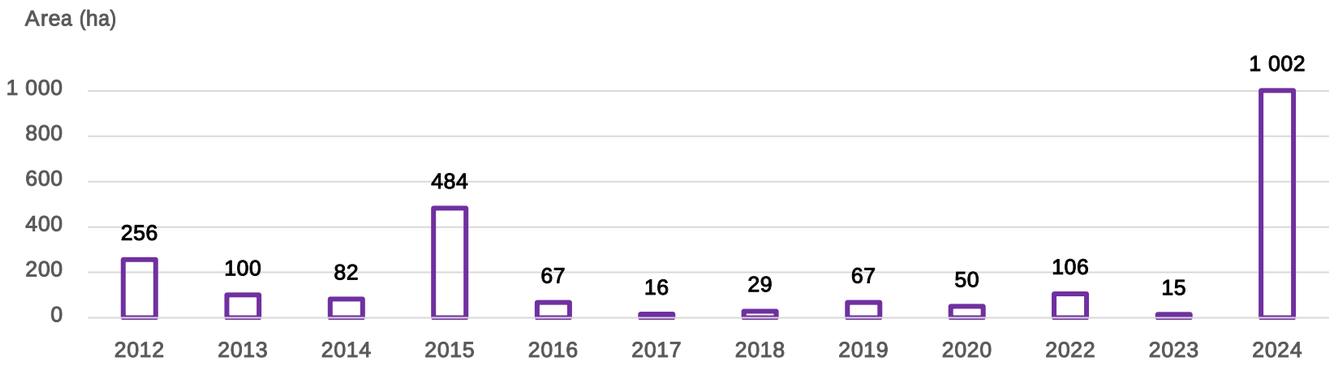
2025 Update

This indicator shows biodiversity-related land acquisitions (2012-2024) and development facilitation unlocked as a results of the Macassar conservation land bank in relation to the terrestrial Biodiversity network.

Source: Biodiversity Management, Environmental Management, City of Cape Town



Map B1-e: Biodiversity network (2024) with focal biodiversity-related land acquisitions (2012-2024).



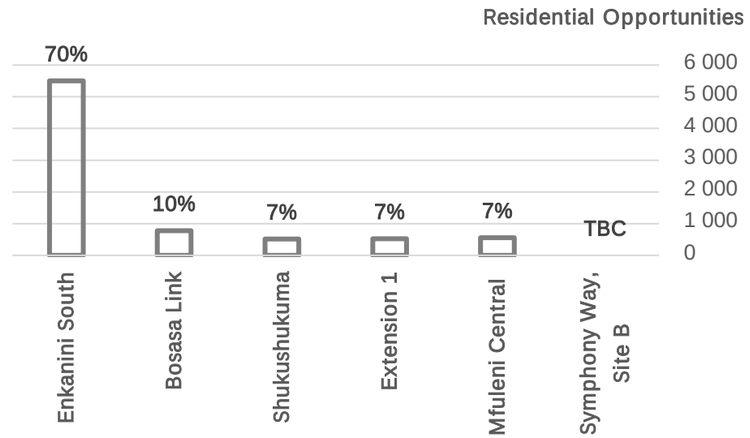
Graph B1-f: Area (ha) of land acquired for conservation (2012-2024).

OVERVIEW

The Biodiversity Management Branch (BMB) proactively identifies and purchases priority conservation land for protected area expansion and potential development facilitation. Where there is unavoidable biodiversity loss for a City development, these proactively conserved sites, collectively known as the development facilitation conservation land bank, can be considered for use as a potential offset by the specialists and competent authority.

To date, the Macassar East conservation land bank has been extensively used to facilitate development while mitigating the loss of non-priority Strandveld vegetation remnants in the Metro southeast. As a result, ~7 879 residential opportunities across six major development sites were realised (Graph B1-e), while simultaneously contributing to the consolidation and formal protection of the Macassar East section of Wolfgat Nature Reserve (Map B1-e).

The Enkanini south development has accounted for most of the residential opportunities unlocked as a result of the Macassar conservation land bank (Graph B1-e).



Graph B1-e: Number and percentage of residential opportunities unlocked as a results of the Macassar conservation land bank.

OVERALL TREND

Between 2012 and 2024, 2 275 ha of land was purchased by City of Cape Town for conservation. See map B1-e for an illustration of where these sites are located as well as graph B1-f for a breakdown of hectares acquired per year. Conservation land banking in the Atlantis area facilitated the Generic Environmental Management Programme (gEMPr), removing the clearing of vegetation from environmental authorisation triggers for land within the Atlantis urban edge.

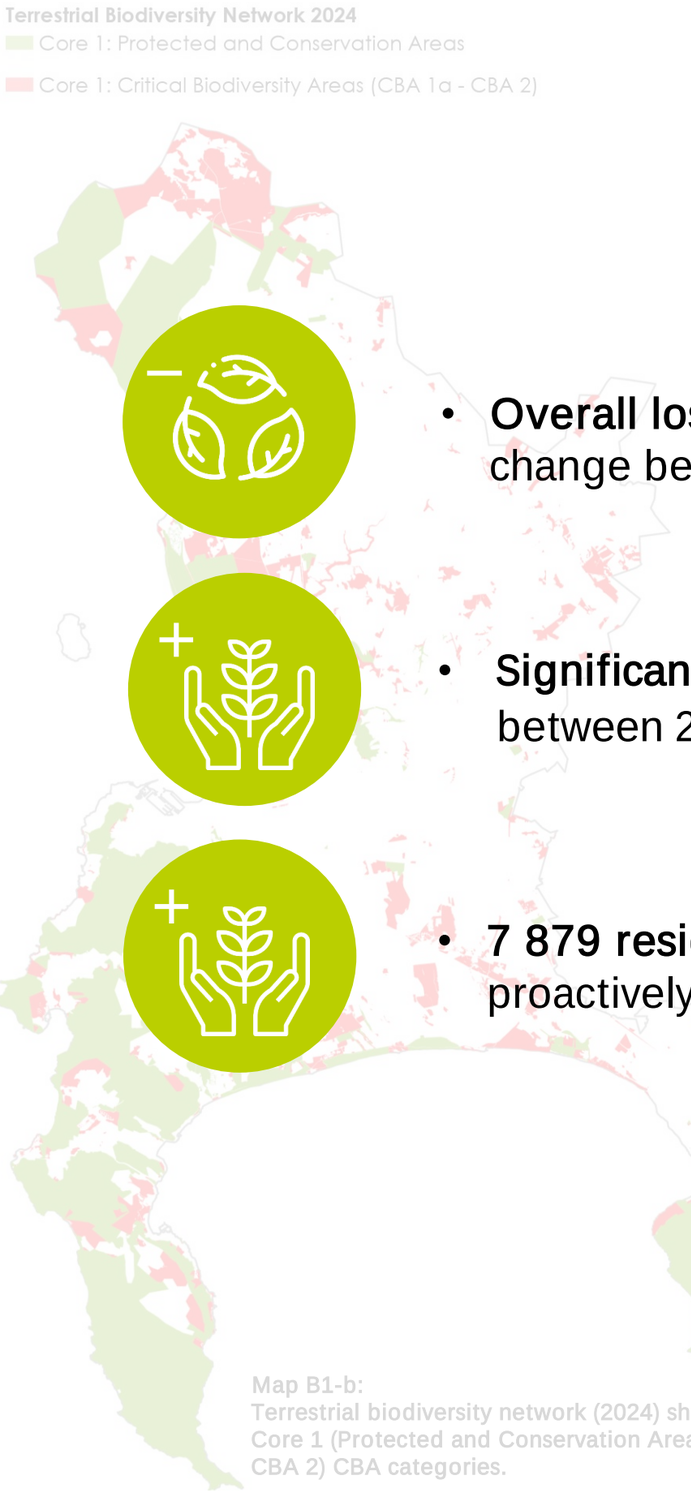
SPATIAL TREND (DISTRIBUTION/PATTERN)

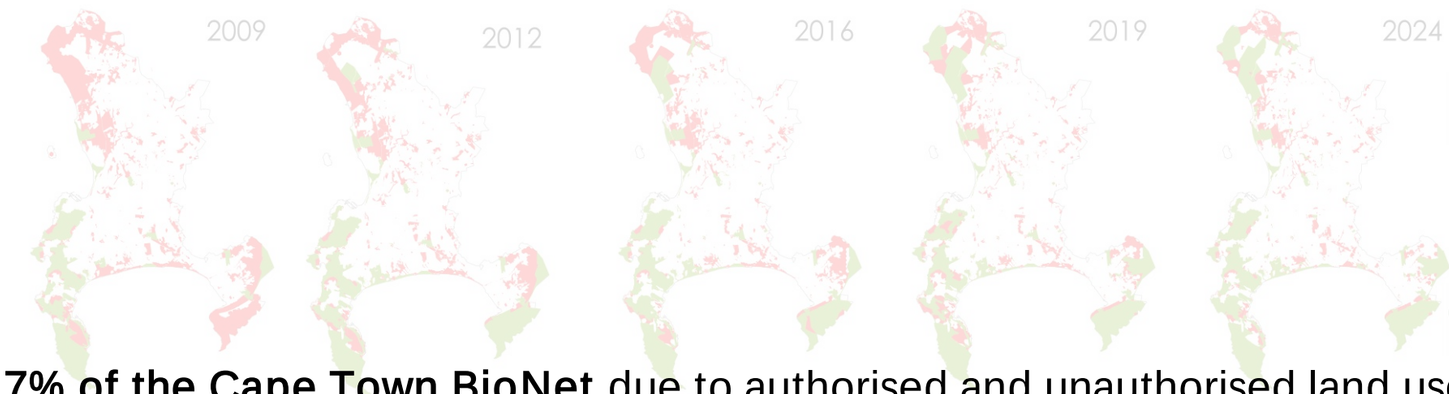
Between 2012 and 2024, land was acquired to expand ecological corridors, including areas near Witzands Aquifer Nature Reserve (WANR) (Graph B1-f). In 2020 and 2022, erven linking Blaauwberg and Koeberg Nature Reserves were secured (Map B1-e). The land includes Endangered Atlantis Sand Fynbos and Swartland Granite Renosterveld. In 2022, erven in Rooi Els (outside Cape Town) were added. The inclusion of the Strandfontein Aquifer and Macassar East Sections strengthens biodiversity connectivity to the False Bay coast via Wolfgat Nature Reserve, while the Imhoff Link and Soetwater Conservation Area are key to securing the Cape Peninsula's ecological network (Map B1-e).

B.1

BIODIVERSITY NETWORK

KEY TAKE-AWAY TRENDS





Core BioNet
Change of -7%

Protected & Conserved
Change of +31%

- **Overall loss of 7% of the Cape Town BioNet** due to authorised and unauthorised land use change between 2009 and 2024 – an additional 2% loss since it was last recorded in 2019

- **Significant gain of +31% of the Cape Town BioNet protected and conserved areas** between 2009 and 2024 due to proactive land acquisitions and conservation land banking.

- **7 879 residential opportunities unlocked** as a result of biodiversity offsets facilitated by the proactively secured Macassar East Conservation Land Bank.

Map B1-b:
Terrestrial biodiversity network (2024) showing the Core 1 (Protected and Conservation Areas, CBA 1a-CBA 2) CBA categories.

Graph B1-b: Area (ha) and percentage of the core biodiversity network (Core 1: Protected and Conservation Areas, CBA 1-2) compared to the 2009 baseline.

OVERVIEW

Map series B1-a shows the Core 1 BioNet areas. These are Core 1: Protected and Conserved and Core 1: CBA (CBA 1a-c and CBA 2) that are required to meet national biodiversity targets. They are included as critical natural assets in the City's Municipal Spatial Development Framework (MSDF).

OVERALL TREND

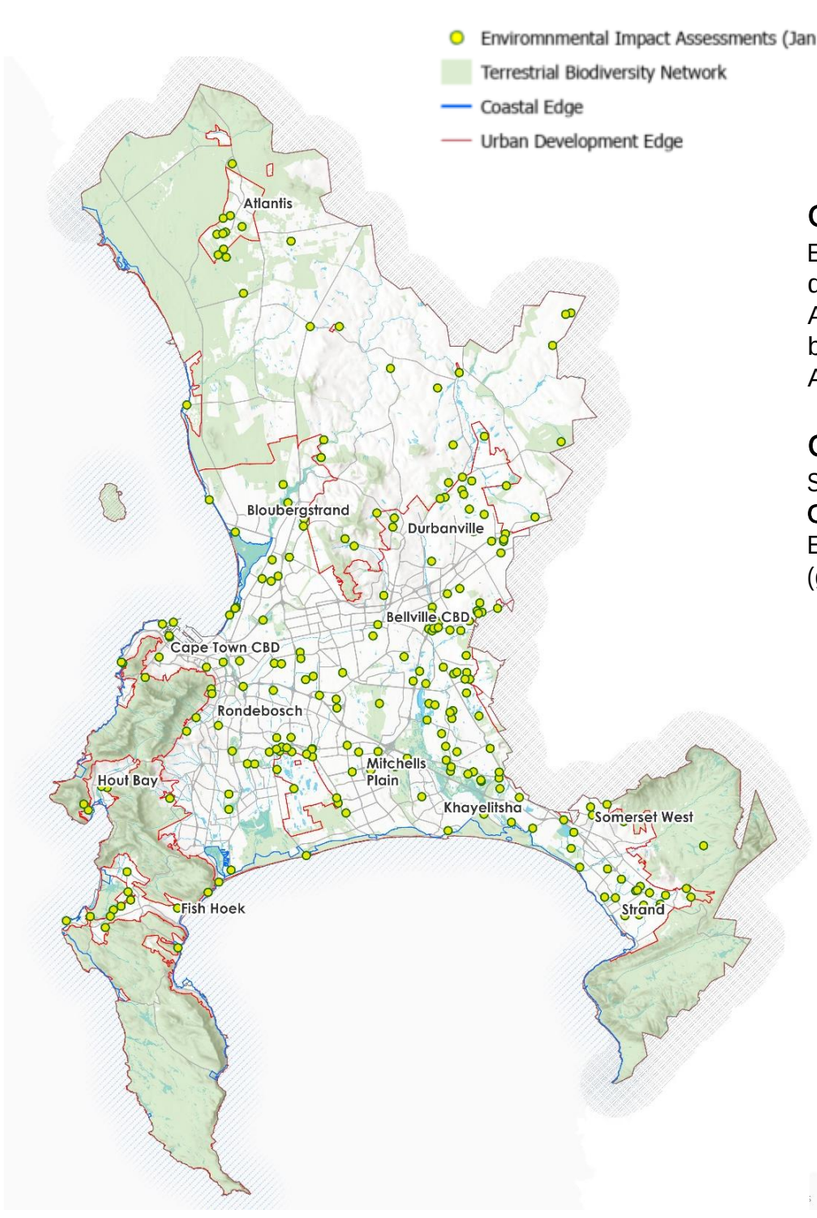
This indicator monitors the pace at which biodiversity is being lost to other land uses and whether City policies and strategies to protect it are effective. It also tracks the rate at which habitat is being protected via proclamation and/or on-site management. The overall trend is a loss of 7% core BioNet between 2009 and 2024: an area of 21 621 ha. However, there was a 31% increase in the extent of BioNet that is protected and/or conserved (see map series B1-a and Graph B1-b).

NATURAL AND AGRICULTURAL ASSETS

EARLY DETECTION - EIAS

This indicator shows the number of **Environmental Impact Assessments** authorised or refused between Jan 2018 and Dec 2024 (**excluding those relating to telecommunication masts and base stations)** where Western Cape Provincial Government was the competent authority

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



Map B2-a: EIAs (Jan 2018 – Dec 2024) authorised or refused

Map B2-a and Graph B2-a are produced using Western Cape Government's spatialised EIA dataset which is currently being taken through a Quality Assurance (QA) process. As some data still needs its quality assured, the map and statistics may change slightly in future. Appeals & amendments are not captured in the data. **Table B2-a and Graph B2-b** are produced using Western Cape's EIA Excel database extract as it contains additional attributes that are not currently available in the spatialised data. These statistics too may change.

YEAR	2018	2019	2020	2021	2022	2023	2024
Total EIA Authorised	24	28	35	29	49	35	29
Total EIA Refused	0	1	0	1	1	2	2

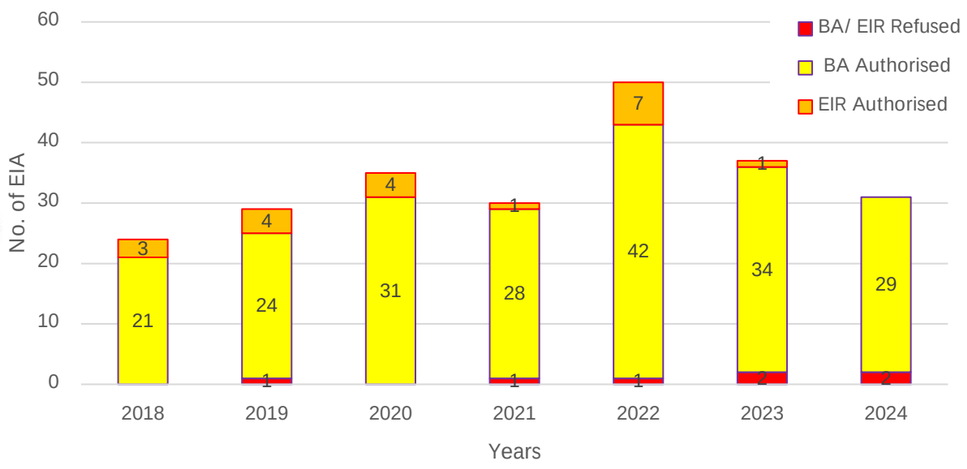
Table B2-a: Total no. of EIAs (June 2018 – Dec 2024) authorised or refused per year

OVERVIEW

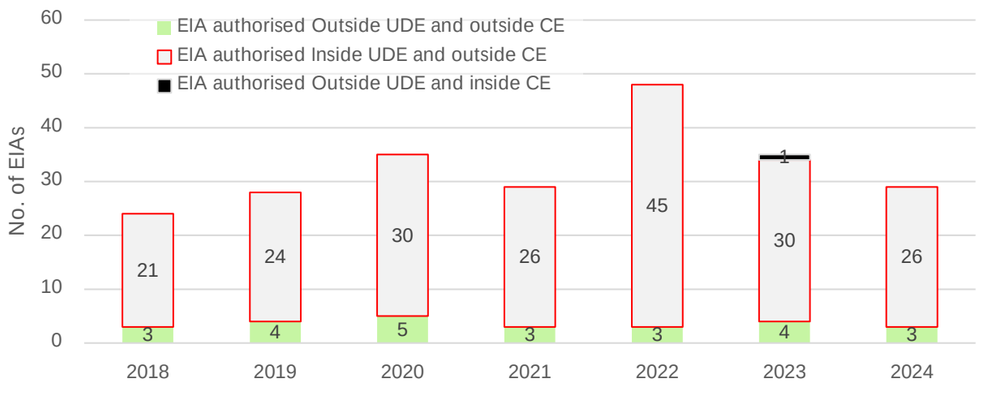
Environmental Impact Assessments (EIAs) are required in terms of the National Environmental Management Act (NEMA) whenever a proposed development may significantly impact the environment, socio-economic conditions and/or cultural heritage of a site. There are two types. Basic Assessments (BAs) are conducted 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. In terms of **EIAs evaluated by Western Cape Government**, there were seven refused between January 2018 and December 2024 and a total of 229 authorised. Of those authorised, 23 were EIRs and 209 were BAs. Between 2019 and 2023, the number of EIAs authorised has remained relatively constant other than a peak in 2022 (graph B2-b).



Graph B2-b: No. of EIAs (BAs vs EIRs) authorised or refused (June 2018 – Dec 2024)



Graph B2-a: No. of EIAs (BAs + EIRs) authorised (Jan 2018 – Dec 2024) inside/outside of the Urban Development Edge (UDE) and/or seaward/landward of the Coastal Edge (CE)

If City planning policies and strategies are working, the expectation is that authorisations for sites located outside the **Urban Development Edge (UDE)** and/or seaward of the **Coastal Edge (CE)** will continue to remain low or decrease (graph B2-a). Note that **EIAs relating to telecommunication masts and base stations have been excluded from this study** as their development has little effect on the land absorption rate.

SPATIAL TREND (DISTRIBUTION/PATTERN)

See Map B2-a. Since 2019, a cluster of EIAs were authorised in the North of the City in the Atlantis Industrial Area. This area was recently declared a **Special Economic Zone** and is a priority area for economic development, in particular where related to renewable energy and other green industries. The Helderberg region has had the highest concentration of EIAs authorised.

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.

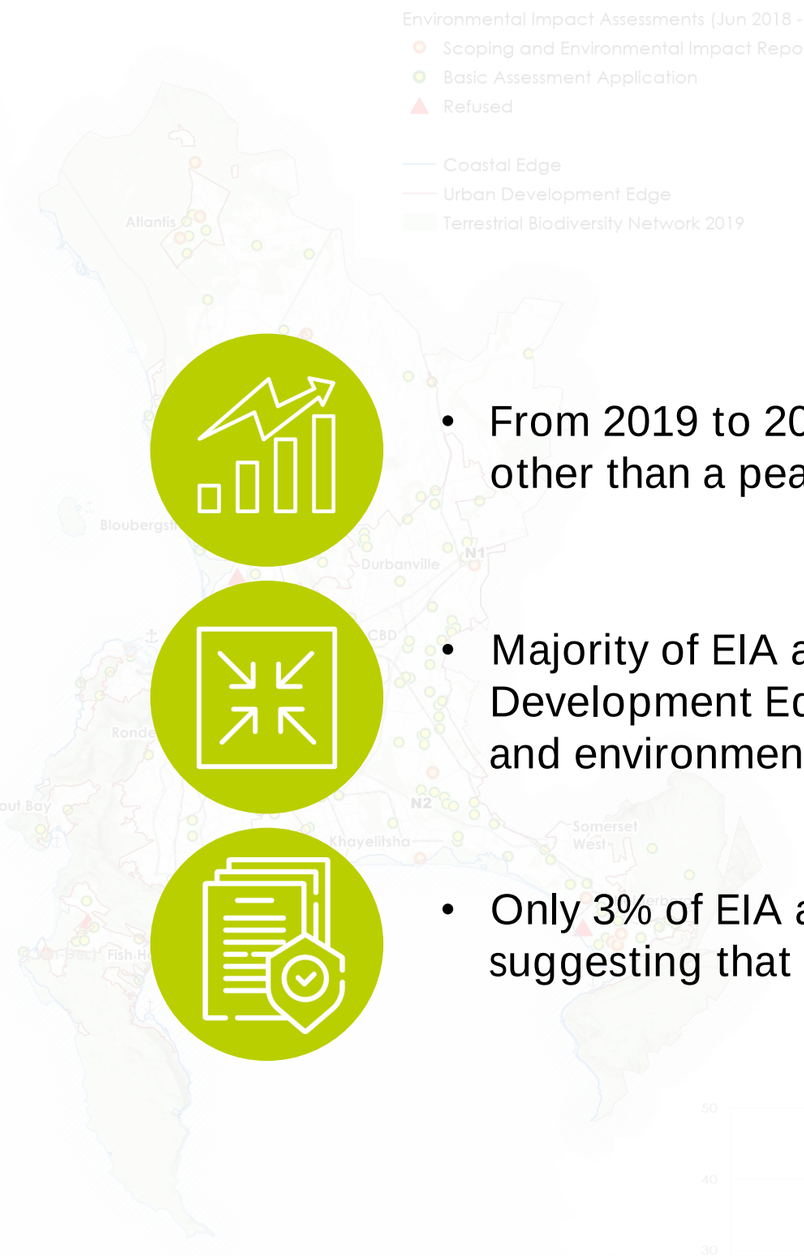
The EIAs refused were a property development at Lake Michelle, Noordhoek, a galvanising plant in Belville, two crematoriums, one in Strand and one in Montague Gardens, a proposed organic Waste Beneficiation and Biogas Production Facilities on Farm in Klipheuwel and a proposed high-performance sport centre, Strand

B.2

EARLY DETECTION - EIAS

KEY TAKE-AWAY TRENDS

- From 2019 to 2024, 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 Urban Development Edge and landward of the Coastal Edge, a good indication that spatial and environmental policy is working.
- Only 3% of EIA applications (7) between June 2018 and December 2024 were refused, 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
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

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)

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 (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** to attract investment and development in particular where related to renewable energy and other green industries. The Helderberg region has had the highest concentration of EIAs.

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.

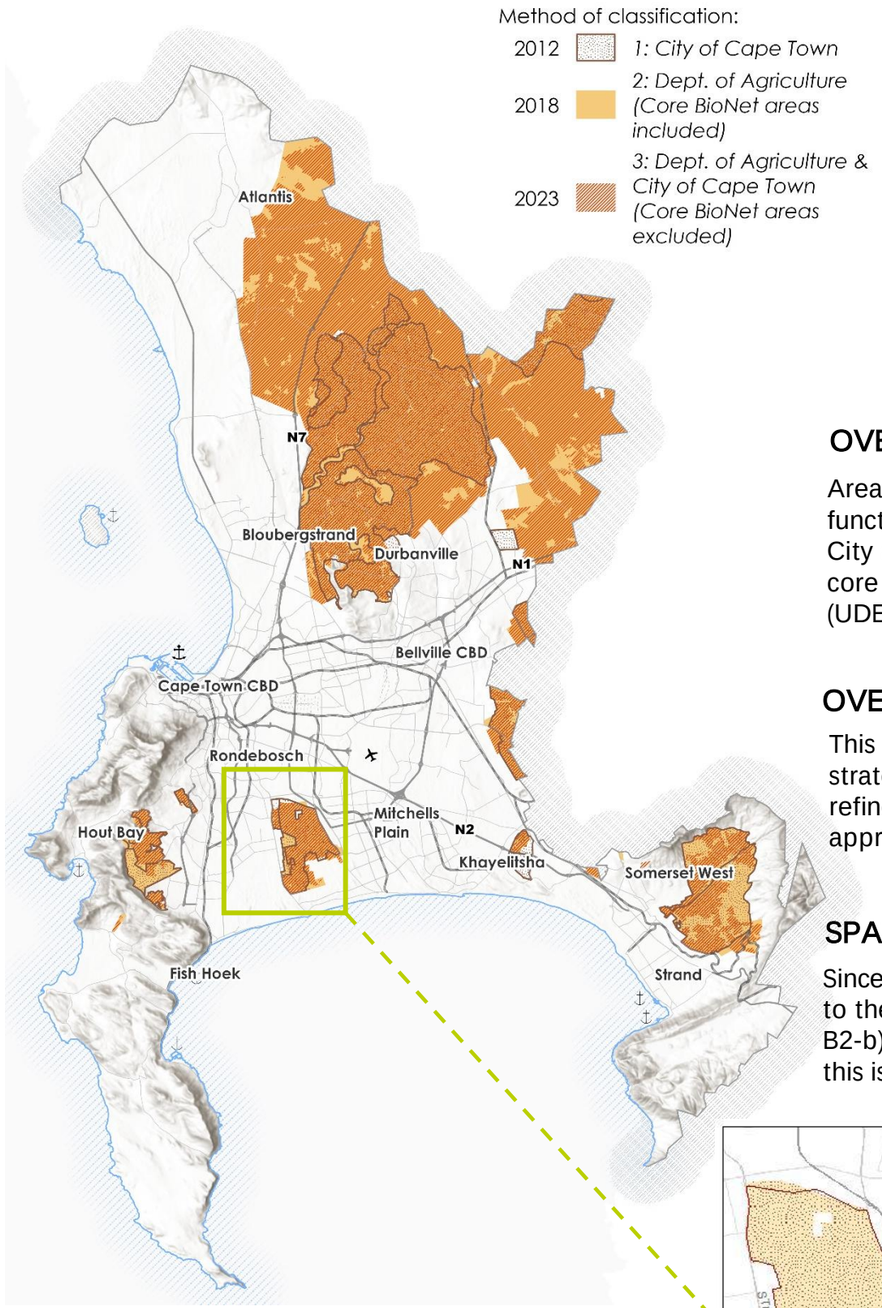
B.3

NATURAL AND AGRICULTURAL ASSETS

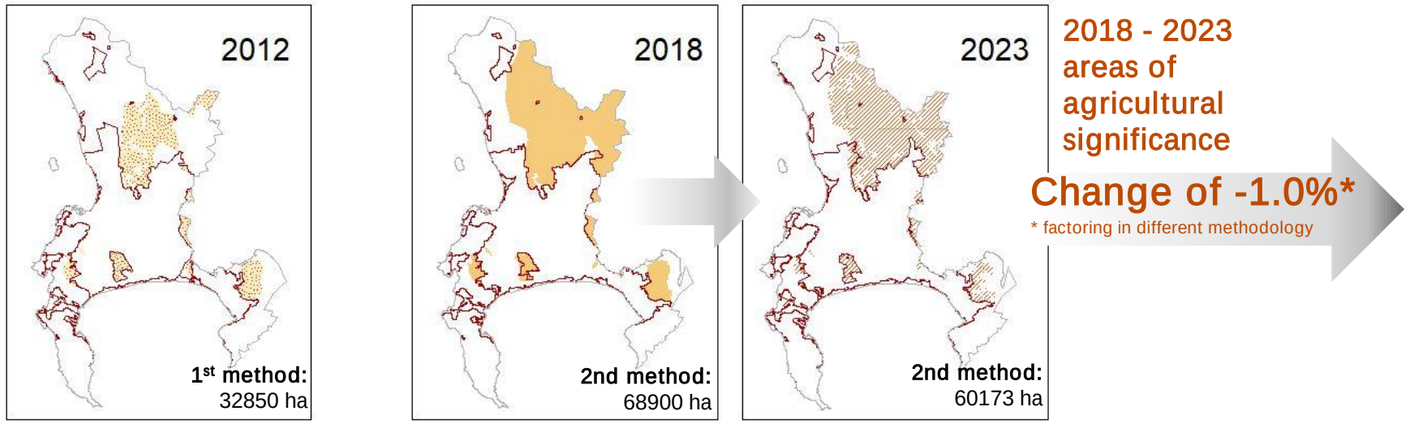
AREAS OF AGRICULTURAL SIGNIFICANCE

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

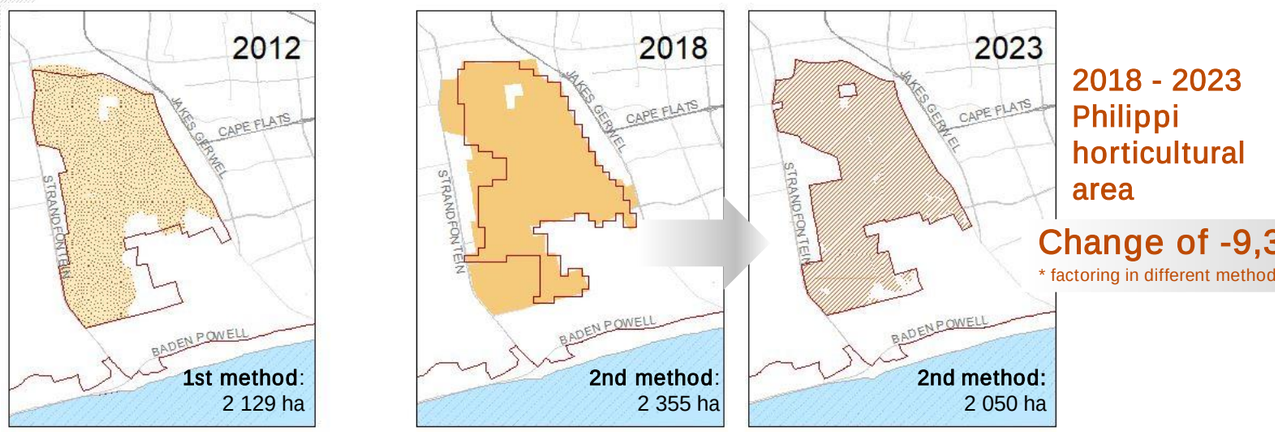
Areas of agricultural significance have unique production, cultural and heritage attributes and are critical for food security and ecosystem function. In 2012, areas of agricultural significance were identified by City of Cape Town based on soil potential only (map B2-a). In 2018, the City and Western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

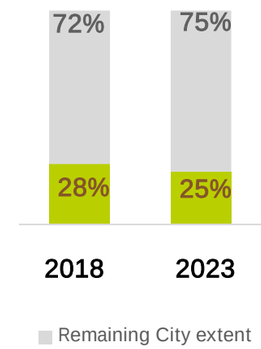
This indicator helps to determine the pace at which agricultural areas are being consumed by other land uses and whether City policies and strategies to preserve them are effective. Roughly 607 ha of the loss and 766 ha of the gain between 2018 and 2023 can be attributed to more refined data capturing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

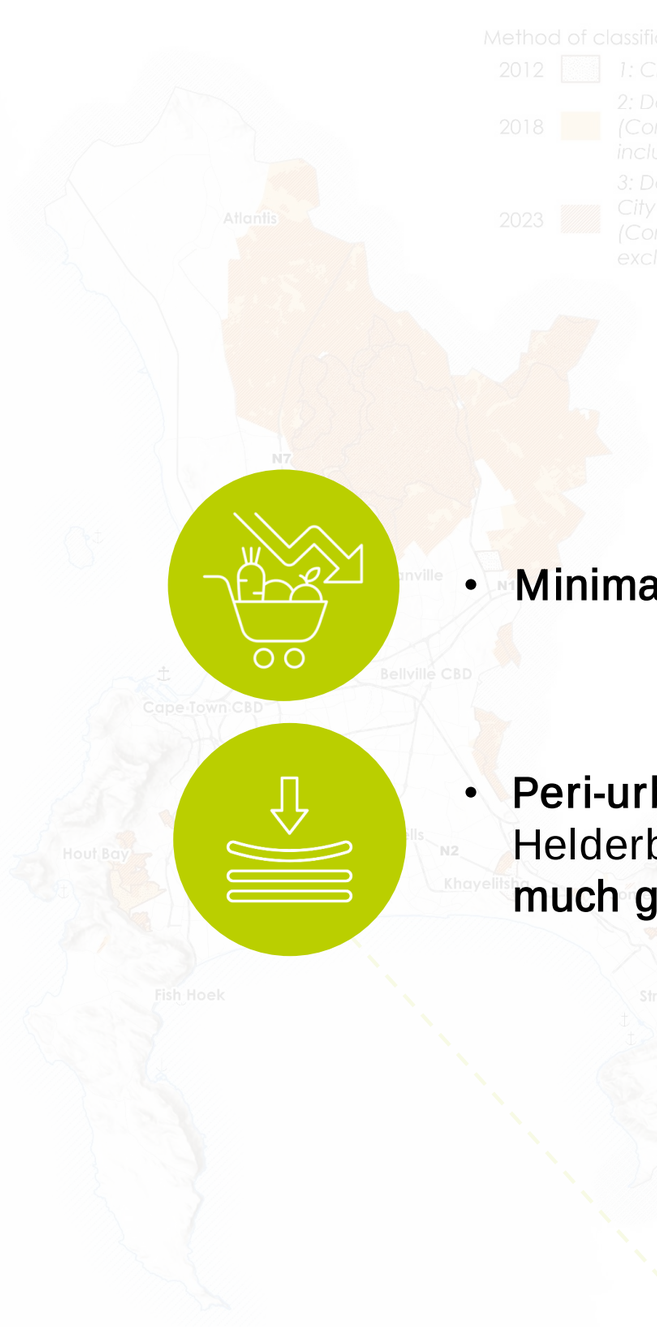


Graph B2-a: Percentage of the City extent per year that is an area of agricultural significance

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 methodology. 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 1%. 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.

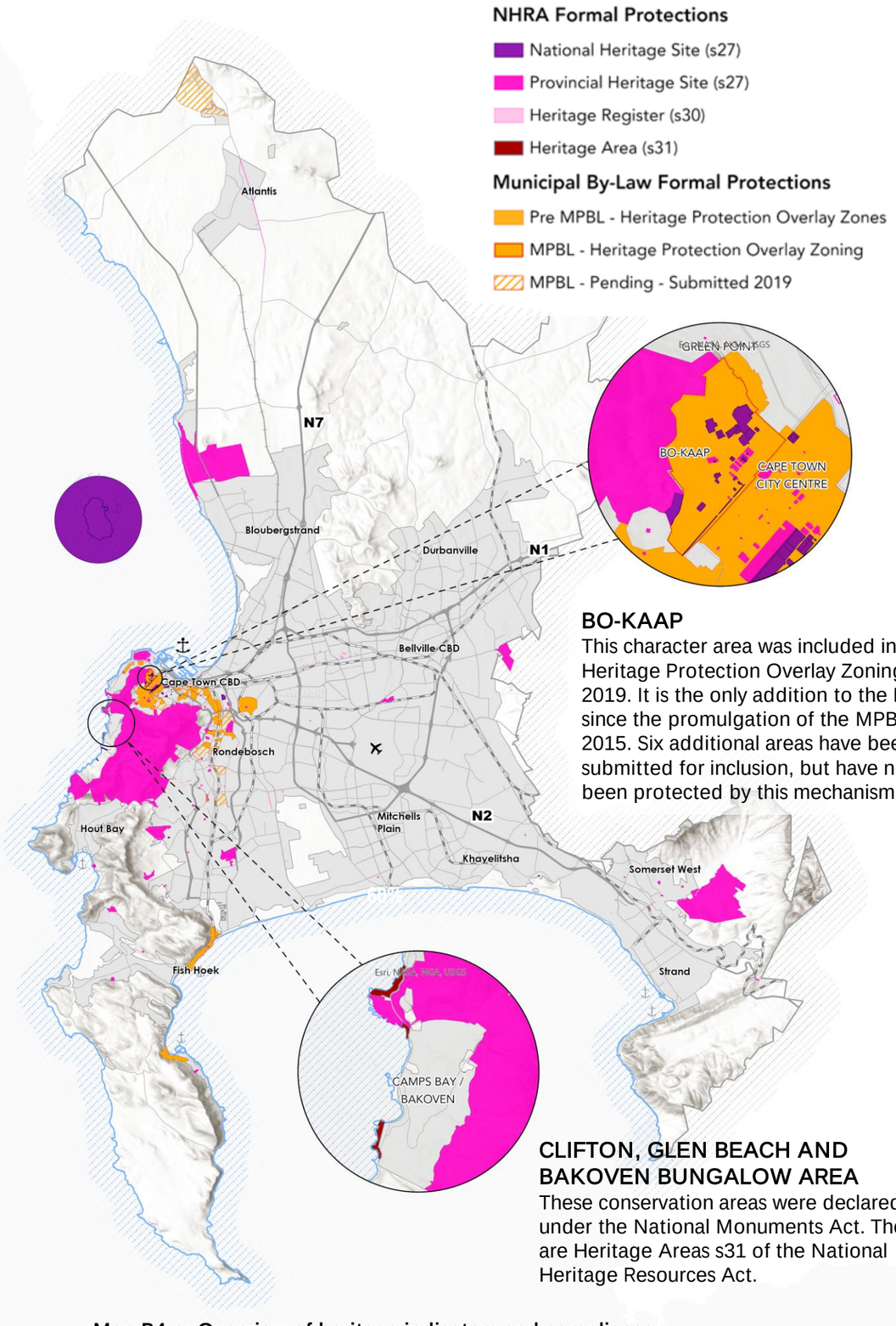
HERITAGE MANAGEMENT & LEGISLATIVE COMPLIANCE

HERITAGE PROTECTION MECHANISMS

2025 New

This indicator describes the status quo of heritage conservation areas and mechanisms for managing heritage within the City of Cape Town Metropolitan area

Source: Environment and Heritage Resources, Environmental Management, City of Cape Town



BO-KAAP

This character area was included in the Heritage Protection Overlay Zoning in 2019. It is the only addition to the HPOZ since the promulgation of the MPBL in 2015. Six additional areas have been submitted for inclusion, but have not yet been protected by this mechanism.

CLIFTON, GLEN BEACH AND BAKOVEN BUNGALOW AREA

These conservation areas were declared under the National Monuments Act. They are Heritage Areas s31 of the National Heritage Resources Act.

Map B4-a: Overview of heritage indicators and compliance

OVERVIEW

The City of Cape Town is the first local authority to have been found competent in terms of the NHRA, to identify, map and manage local heritage resources (Grade III).

The NHRA prescribes three categories of heritage significance which coincide with the three spheres of governance:

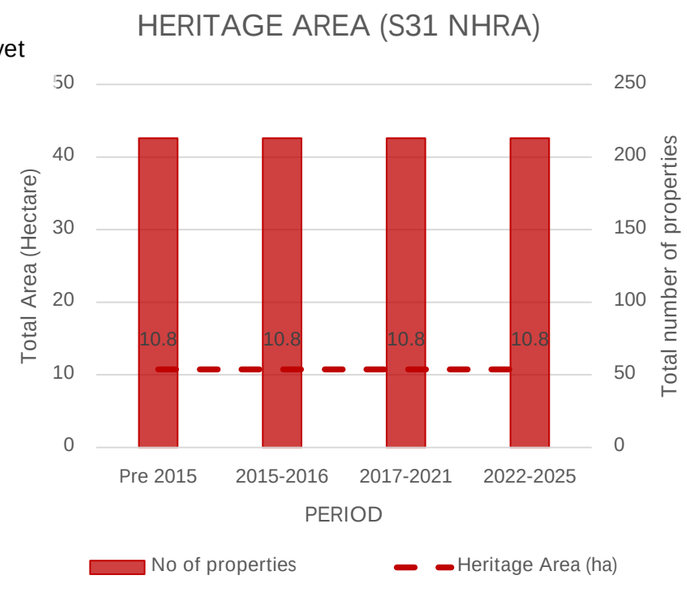
- Grade I: National Heritage Site, managed by the South African Heritage Resources Agency (SAHRA)
- Grade II: Provincial Heritage Site managed by Heritage Western Cape (HWC)
- Grade III: Local heritage resource, envisioned to be managed by the competent Local Authority (i.e. City of Cape Town)

The NHRA requires local authorities to identify conservation worthy places and defined geographical areas for investigate for formal protection at the time of the review of its spatial planning processes. The formal protection mechanism for Grade III heritage resources are the Heritage Register (section 30) and Heritage Areas (section 31). The HPOZ is designed to be the protection mechanism for Grade III heritage places and areas. It forms part of the development management scheme of the MPBL and was designed to be a protection mechanism and applications process consistent with the requirements of section 30 and section 31 of the NHRA.

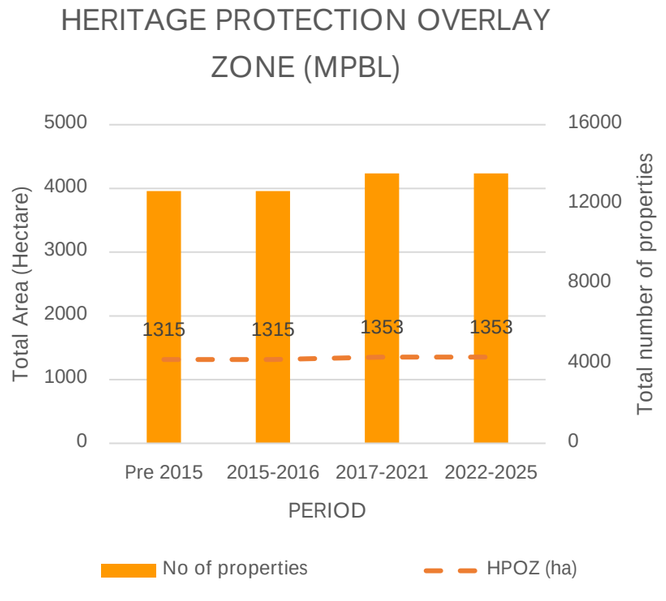
OVERALL TREND

There has been little or no significant growth in the protection of conservation worthy Grade III heritage resources.

- 3 heritage areas were proclaimed prior to 1999 (10,75 ha in total). No new Heritage Areas have been proclaimed since the promulgation of the NHRA. See Graph B4-a.
- 37 HPOZ were formally gazetted as urban conservation areas under the previous town-planning schemes. Only 1 new area, Bo-Kaap, had been added to the HPOZ since the promulgation of the MPBL (1353,12 ha in total). See Graph B4-b and insert to Map B4-a.



Graph B4-a: Growth in the protection of Grade III heritage resources since the promulgation of the National Heritage Resources Act, Act 25 of 1999 (s30 and s31)



Graph B4-b: Growth in the protection of Grade III heritage resources since the Municipal Planning By-Law (2015).

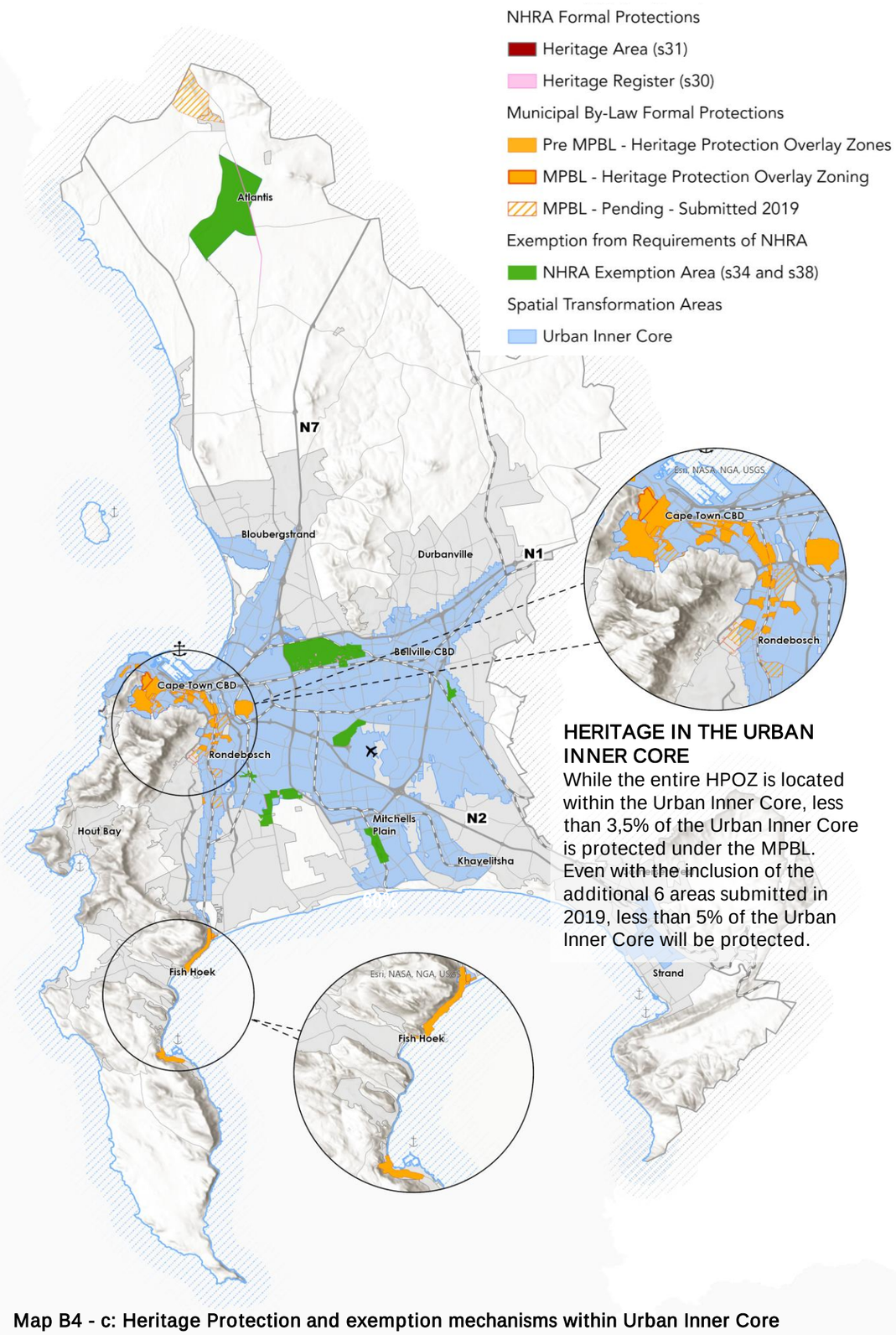
2025 New

HERITAGE MANAGEMENT & LEGISLATIVE COMPLIANCE

HERITAGE AND THE URBAN FOOTPRINT

This indicator describes the status quo of heritage conservation and exemption in the context of the Urban Footprint and the Urban Inner Core

Source: Environment and Heritage Resources, Environmental Management, City of Cape Town



Map B4 - c: Heritage Protection and exemption mechanisms within Urban Inner Core

HERITAGE IN THE URBAN INNER CORE

While the entire HPOZ is located within the Urban Inner Core, less than 3,5% of the Urban Inner Core is protected under the MPBL. Even with the inclusion of the additional 6 areas submitted in 2019, less than 5% of the Urban Inner Core will be protected.

OVERVIEW

The City of Cape Town is the oldest urban settlement in South Africa and it is fitting that the focus of the HPOZ is within the oldest parts of the City. The HPOZ constitutes less than 4% of the Urban Inner Core and has the highest concentration of conservation worthy heritage resources and formally protected heritage sites. Heritage is a non-renewable resource, once its heritage significance has been lost through demolition it is lost forever.

Within the HPOZ - 70% of properties are Grade III heritage resources worthy of conservation

Outside the HPOZ - 15% of properties are Grade III heritage resources worthy of conservation

The increasing number of building stock coming under the general protection of the NHRA (s34), requiring a permit for alterations/demolition of a structure or part of a structure older than 60 years, is placing immense pressure on both HWC and the City without adding value to the conservation of heritage. In order to reduce unnecessary administrative burden, the City is focusing on activating the exemptions provided for in the NHRA. Within the 2022-2025 time period, the City has increased its NHRA exemption areas from approximately 31 ha to over 4200 ha. The NHRA exemption program is coinciding with the Development Focus Areas and Spatially Targeted Areas to promote appropriate development in these areas through the removal of unnecessary administrative processes.

The City is desirous of redressing the spatial imbalances resulting from apartheid town planning practices through enabling the return to 'well located areas' of communities who had experienced Forced Removals. Various mechanism are being explored to achieve this redress.

OVERALL TREND

There is an increasing development trend within the HPOZ as these are 'well located areas' within the City and this places pressure on the conservation and preservation of heritage resources and the quality of the built environment of these areas for future generations.

Aim is to focus conservation and promotion of heritage in those areas where heritage is significant and where the quality of the built environment is related to its heritage and where the economic activities are associated with heritage and heritage tourism.

	HPOZ	Heritage Area s31	Heritage Register s30	NHRA Exemption s34 and s38
Urban Footprint (97 272,48 ha)	1,4%	0,01%	0,05%	4,4%
Urban Inner Core (41 371,21 ha)	3,3%	0%	0,11%	10,1%
TOTAL (ha)	1 382,67	10,75	46,44	4 259,8

Table B4 - a: Grade III heritage protections and exemptions in relation to the urban development area of the City shown as percentages of the urban development area and the urban inner core.

2025 New

KEY TAKE-AWAY TRENDS

- The HPOZ has grown by 2,92% in the 10 years since the promulgation of the MPBL in 2015.
- 6 additional areas have been proposed to be included in the HPOZ in the 2019 MPBL review (0,52% of the Urban Inner Core).
- Less than 3,5% of the Urban Inner Core has heritage protection.

HERITAGE IN THE URBAN INNER CORE

While the entire HPOZ is located within the Urban Inner Core, less than 3,5% of the Urban Inner Core is protected under the MPBL. Even with the inclusion of the additional 6 areas submitted in 2019, less than 5% of the Urban Inner Core is protected.

OVERVIEW

The City of Cape Town is the oldest urban settlement in South Africa and it is fitting that the focus of the HPOZ is within the oldest parts of the City. The HPOZ constitutes less than 4% of the Urban Inner Core and has the highest concentration of conservation worthy heritage resources and formally protected heritage sites. Heritage is a non-renewable resource, once its heritage significance has been lost through demolition it is lost forever.

Within the HPOZ - 70% of properties are Grade III heritage resources worthy of conservation

Outside the HPOZ - 15% of properties are Grade III heritage resources worthy of conservation

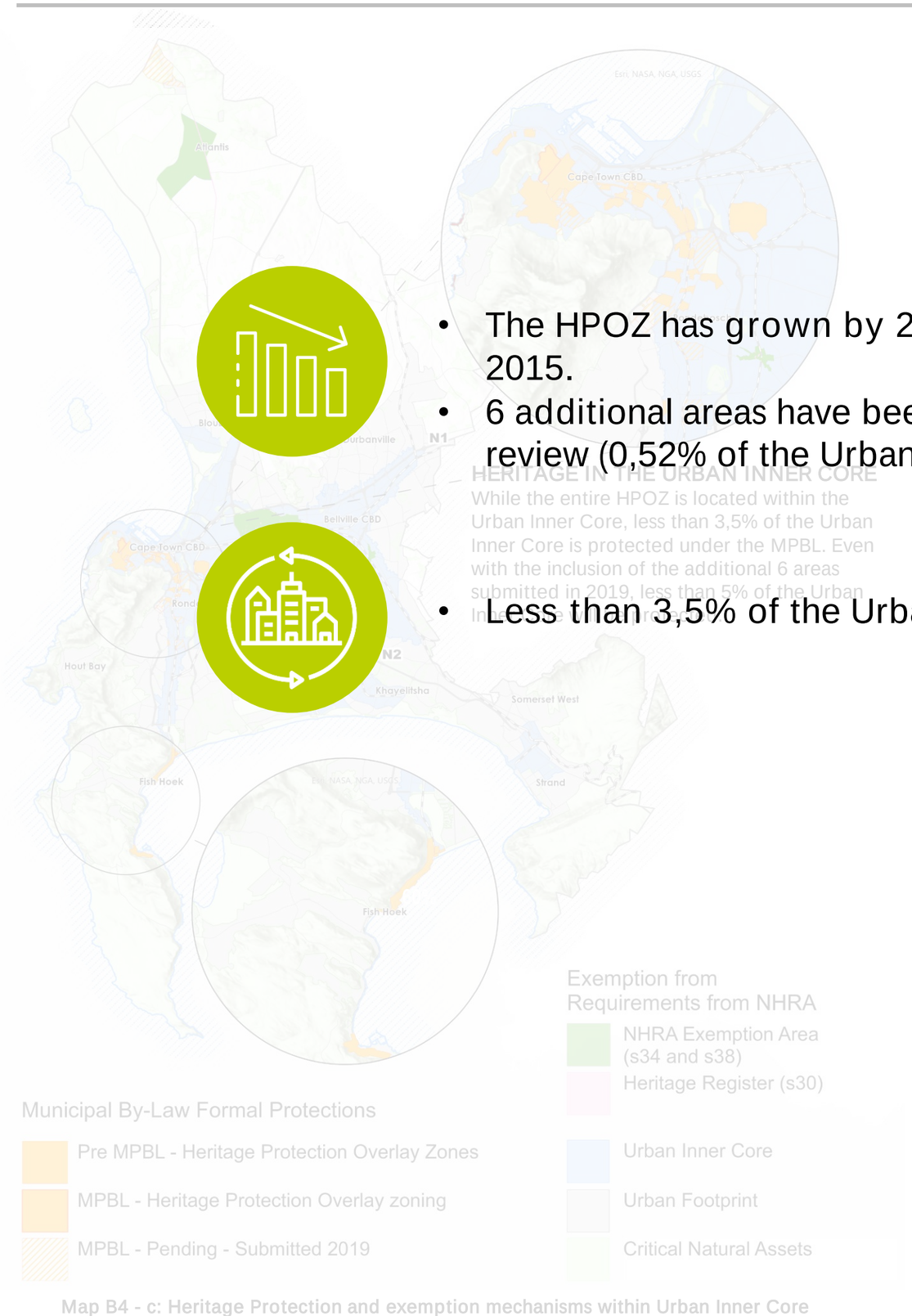
The increasing number of building stock coming under the general protection of the NHRA (s34), requiring a permit for alterations/demolition of a structure or part of a structure older than 60 years, is placing immense pressure on both [illegible] the City. In order to reduce the unnecessary administrative burden, the City is focusing on activating the exemptions provided for in the NHRA. Within the 2022-2025 time period, the City has increased its NHRA exemption areas from approximately 31 ha to over 4200 ha. The NHRA exemption program is coinciding with the Development Focus Areas and Spatially Targeted Areas to promote appropriate development in these areas through the removal of unnecessary administrative processes.

The City is desirous of redressing the spatial imbalances resulting from apartheid town planning practices through enabling the return to 'well located areas' of communities who had experienced Forced Removals. Various mechanism [illegible]

OVERALL TREND

There is an increasing development trend within the HPOZ as these are 'well located areas' within the City and this places pressure on the conservation and preservation of heritage resources and the quality of the built environment of these areas for future generations.

Aim is to focus conservation and promotion of heritage in those areas where heritage is significant and where the quality of the built environment is related to its heritage and where the economic activities are associated with heritage and heritage tourism.



Map B4 - c: Heritage Protection and exemption mechanisms within Urban Inner Core

	HPOZ	Heritage Area s31	Heritage Register s30	NHRA Exemption s34 and s38
Urban Footprint (97 272,48 ha)	1,4%	0,01%	0,05%	4,4%
Urban Inner Core (41 371,21 ha)	3,3%	0%	0,11%	10,1%
TOTAL (ha)	1 382,67	10,75	46,44	4 259,8

Table B4 - a: Grade III heritage protections and exemptions in relation to the urban development area of the City shown as percentages of the urban development area and the urban inner core.

C : LAND AND BUILDING DEVELOPMENT

C1-3 : Residential density
C4 : Non-residential change in land use
C5 : Diversity of use
C6 : Building plan submissions and completions (2025 Update)
C7 : Change in property value

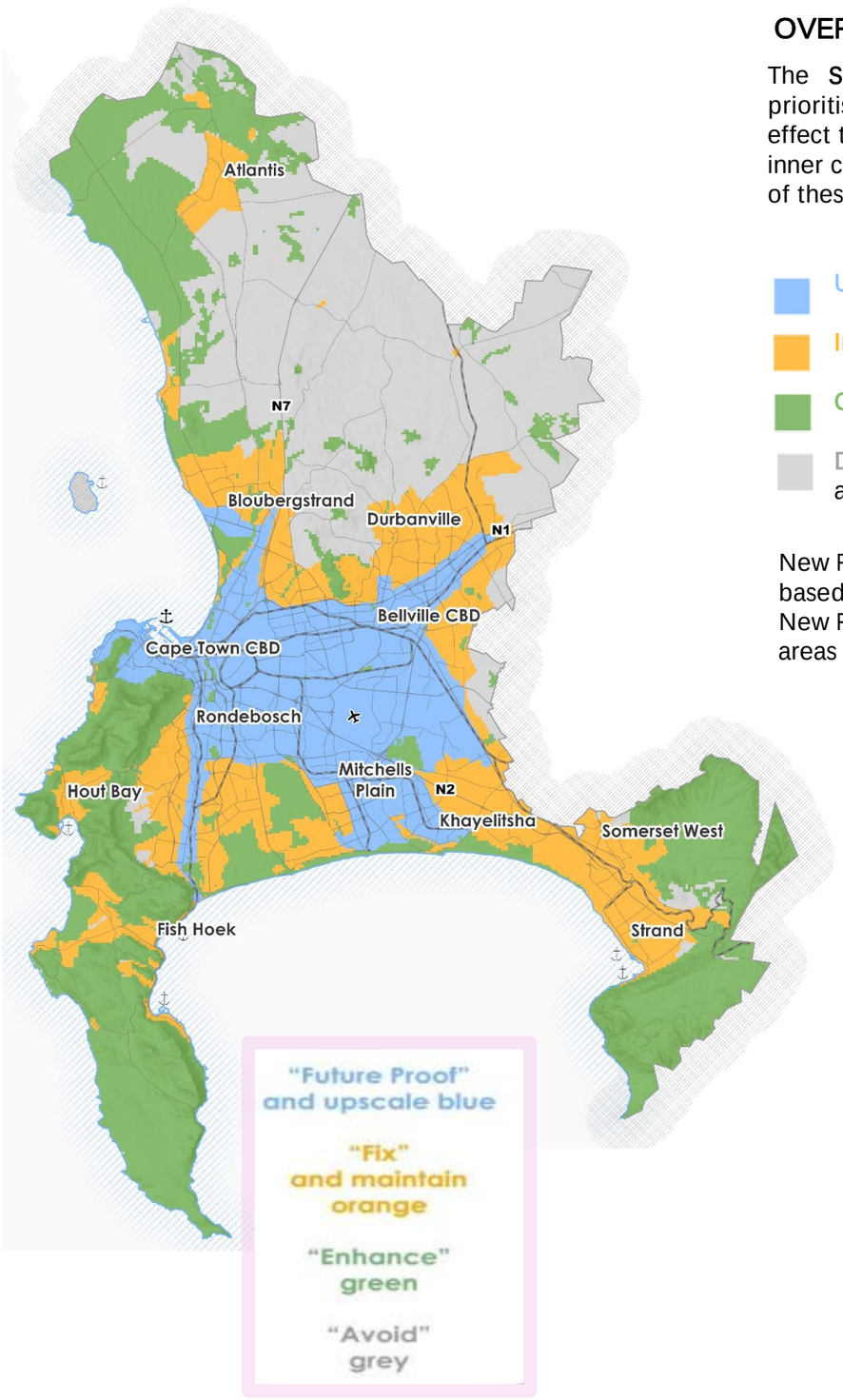
CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

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.

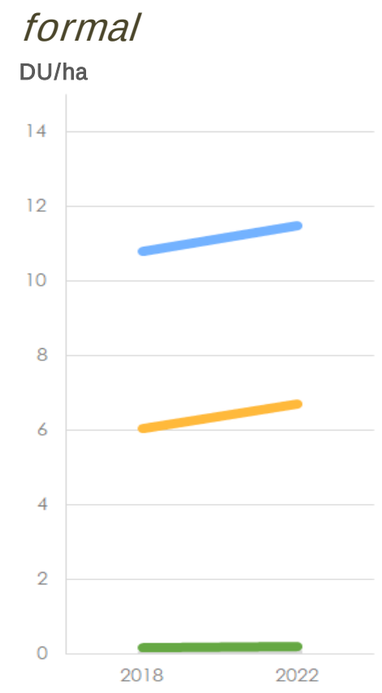
New Residential development is encouraged within the **Urban Inner Core** (UIC) and **Incremental Growth & Consolidation Areas** (IGCA) based on infrastructure availability in the IGCA.
New Residential development is discouraged/prohibited outside of the UDE in the **Discouraged Growth Areas** (DGA) - 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

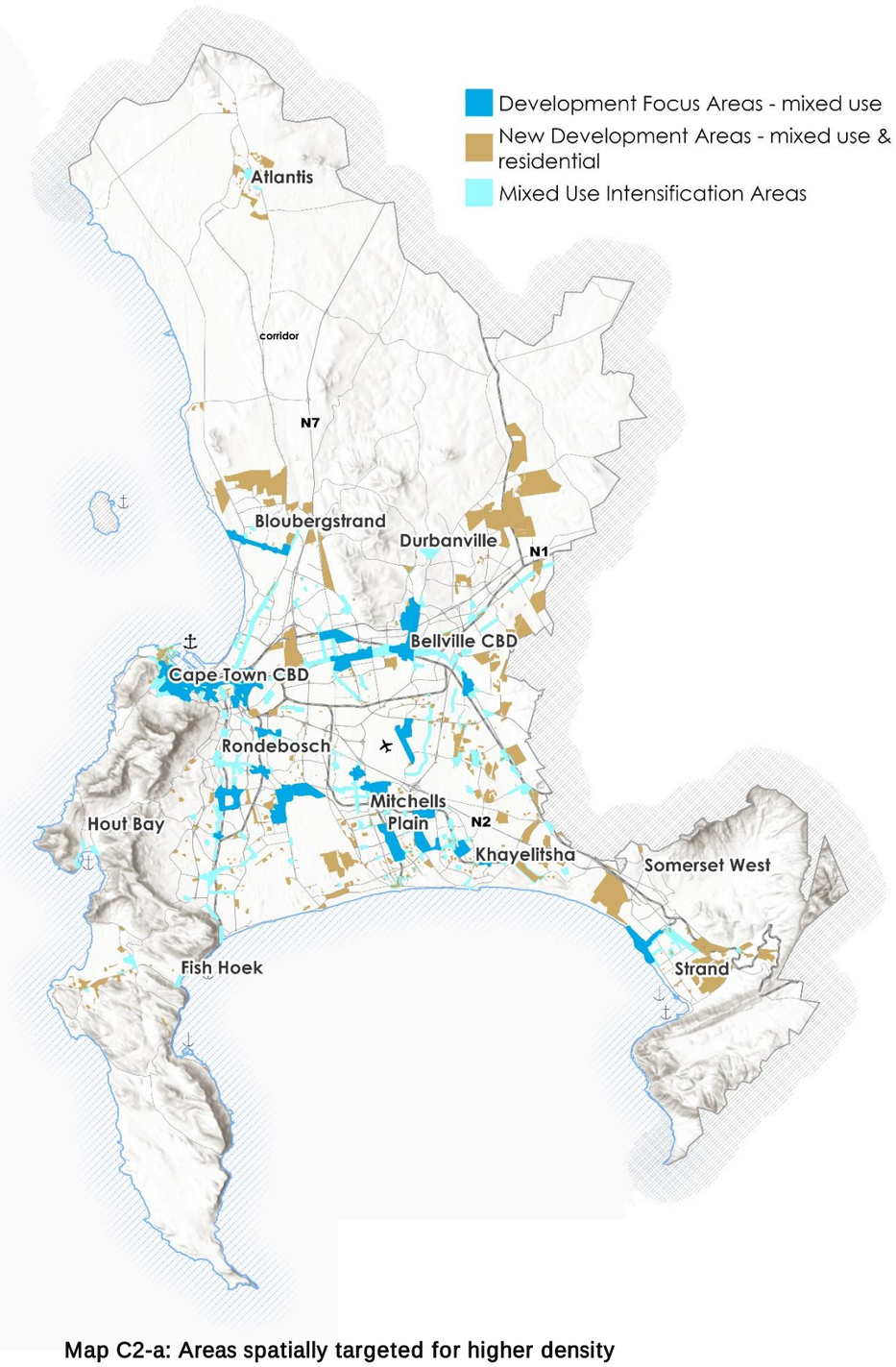
Graph C2a-a: 2018 & 2022 gross formal residential density (dwelling units per hectare) per 2023 STA zone

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.

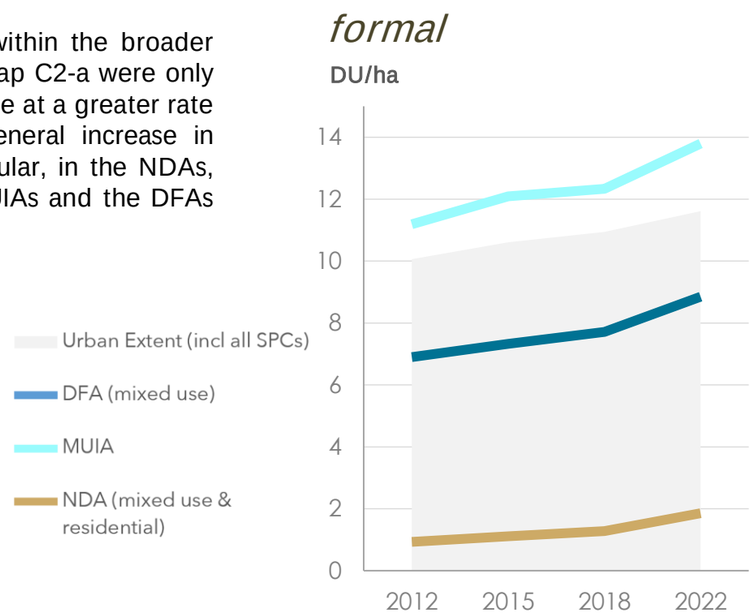
OVERALL TREND

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: 2012 - 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

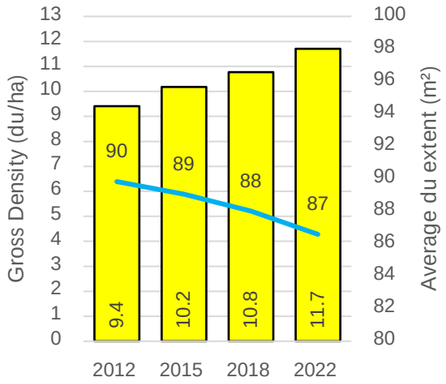
C.3

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

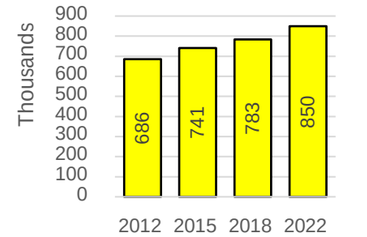
Densification is observed almost everywhere in the city. It occurs in different forms and at varying densities in different areas.

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

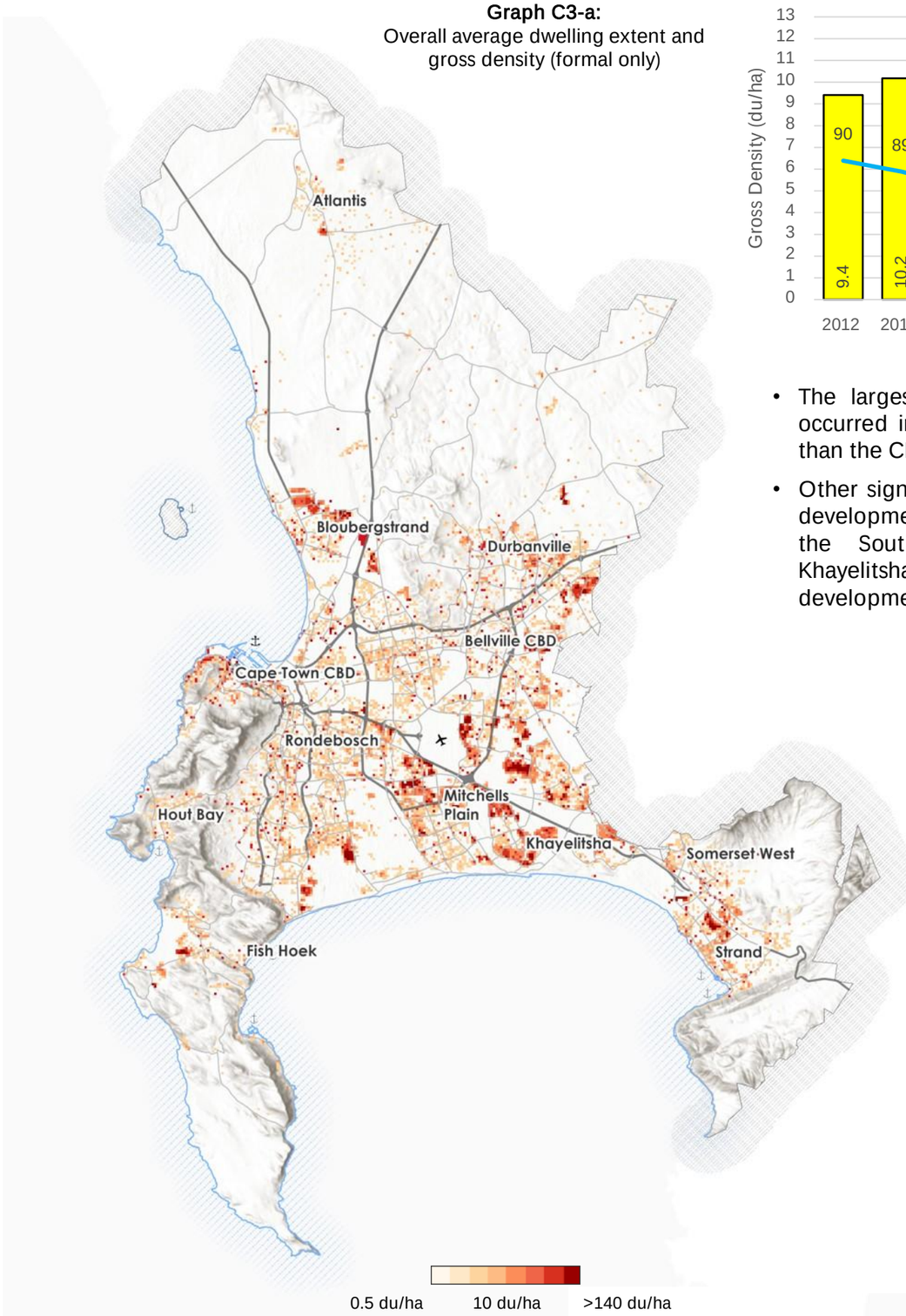
Map C3-b shows the 2022 residential density of formal dwellings (expressed in dwelling units per hectare or DU/ha), i.e. the spatial distribution of dwelling units.

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.

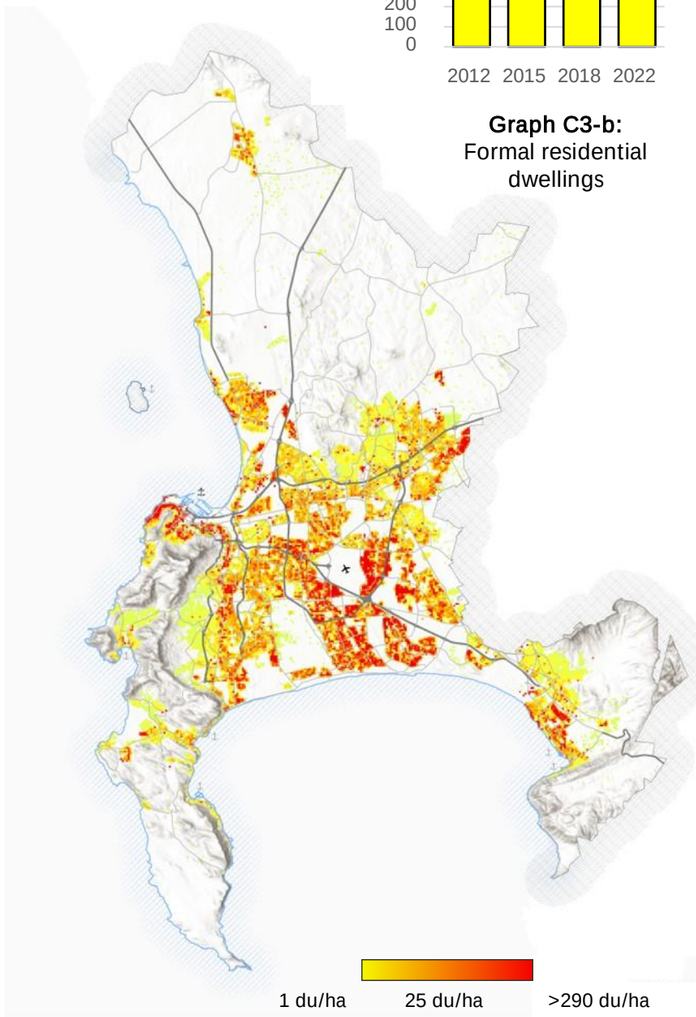
The number of formal residential dwellings increased from ±686,000 in 2012 to ±741,000 in 2015, ±783,000 in 2018 and ±850,000 in 2022 (see graph C3-b). It is of interest to note that the average unit size is ±88m² and that the gross density exhibits a clear increase across the city, albeit at varying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

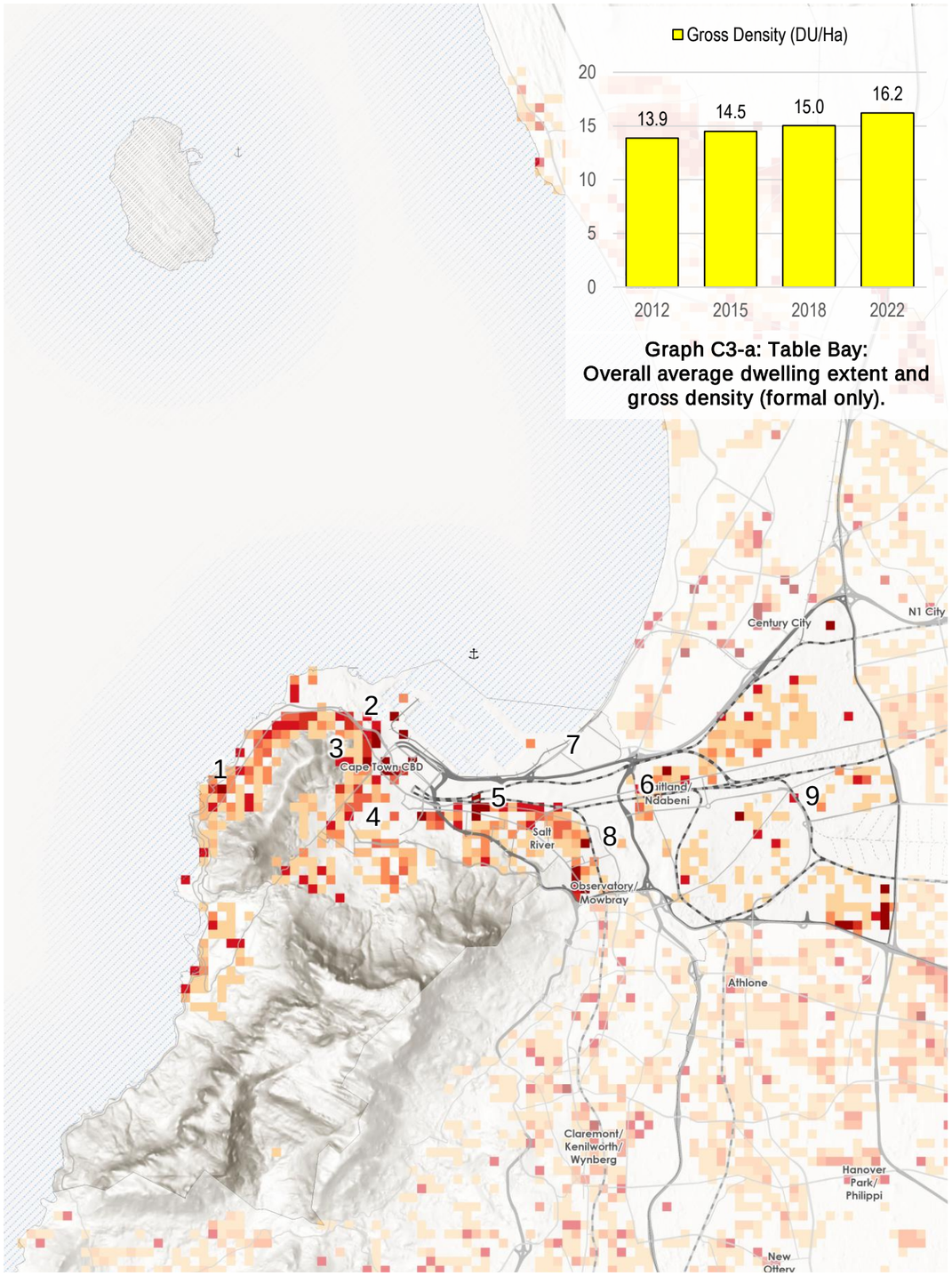
C.3

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



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

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

DISTRICT LEVEL ANALYSIS

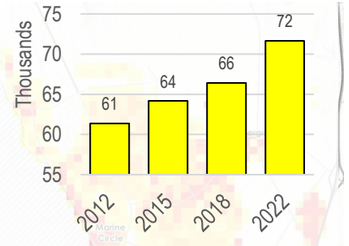
TABLE BAY DISTRICT (A)

ALIGNMENT TO SPATIAL POLICY

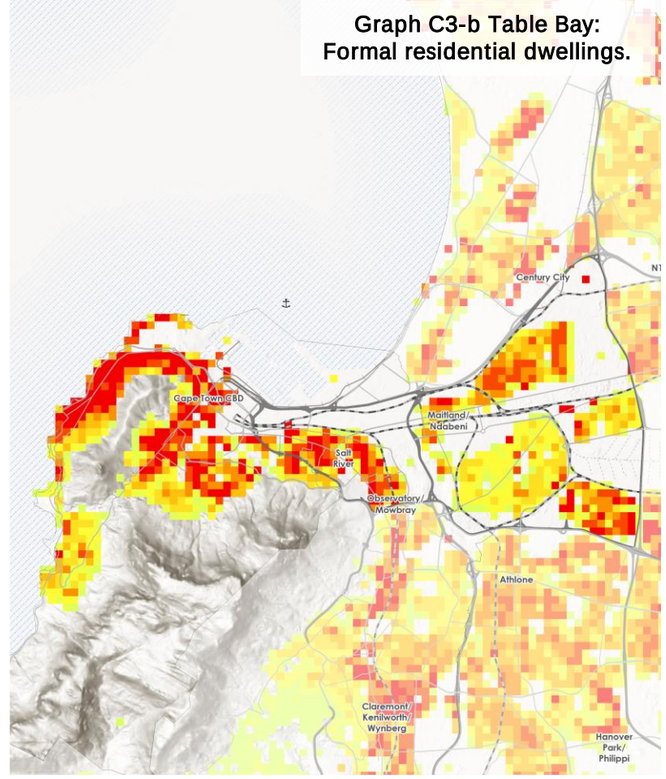
Generally the residential / dwelling densification observed between 2012 and 2022 (Map C3-a) is in line with spatial policy. These locations are well located close to public transport and high concentrations of employment opportunities and business areas. It's also areas of very high property values 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

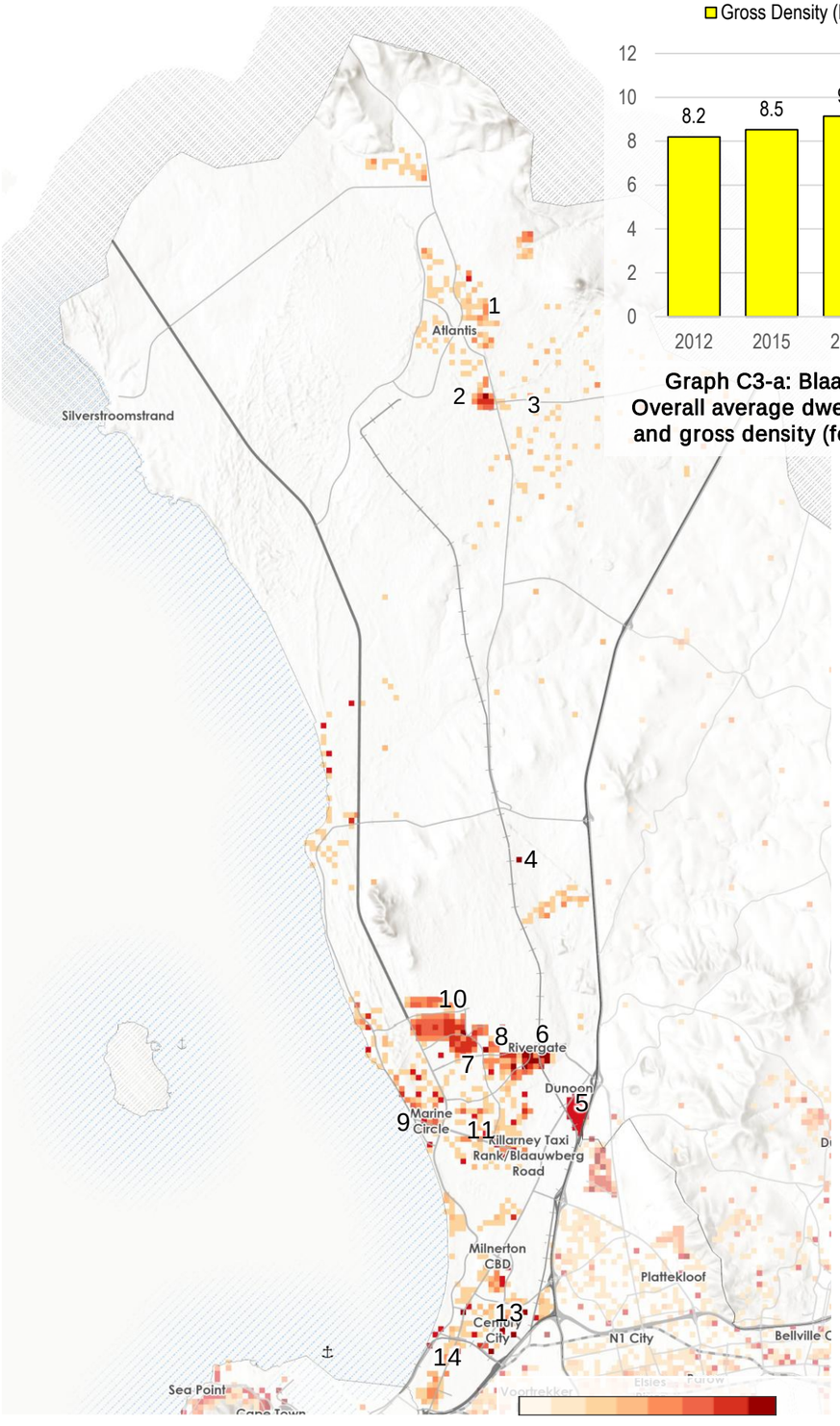
FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

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.

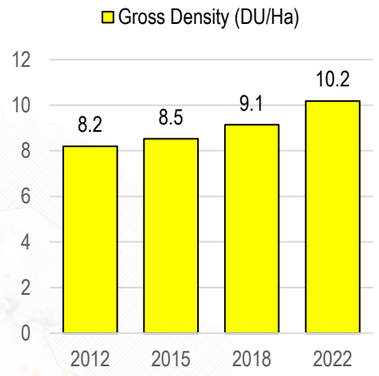
Source: CCT Valuation Rolls 2012, 2015, 2018 and 2022

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)



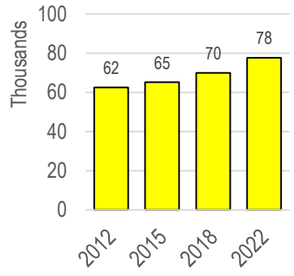
Map C3-a: Blaauwberg: Change in gross residential density (2012 to 2022).



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

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.



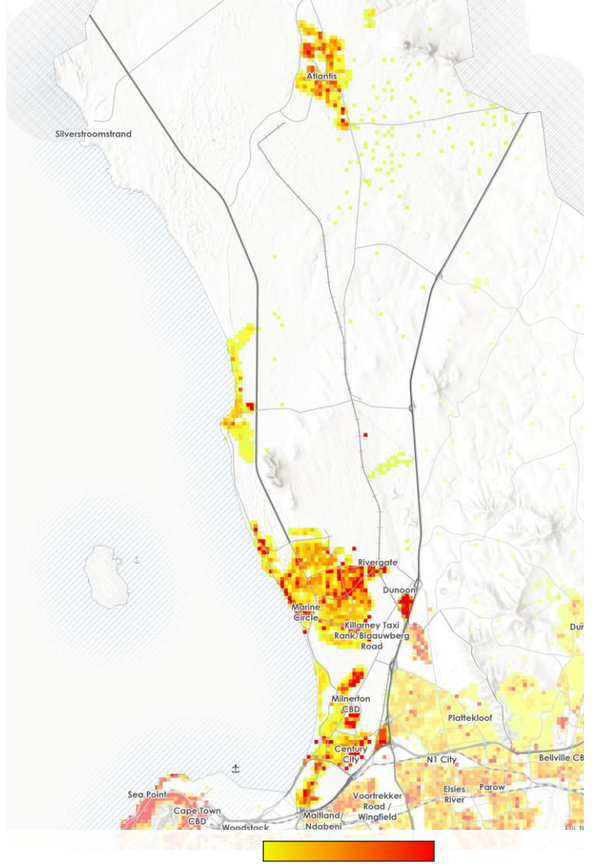
Graph C3-b: Blaauwberg: Formal residential dwellings.

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.



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

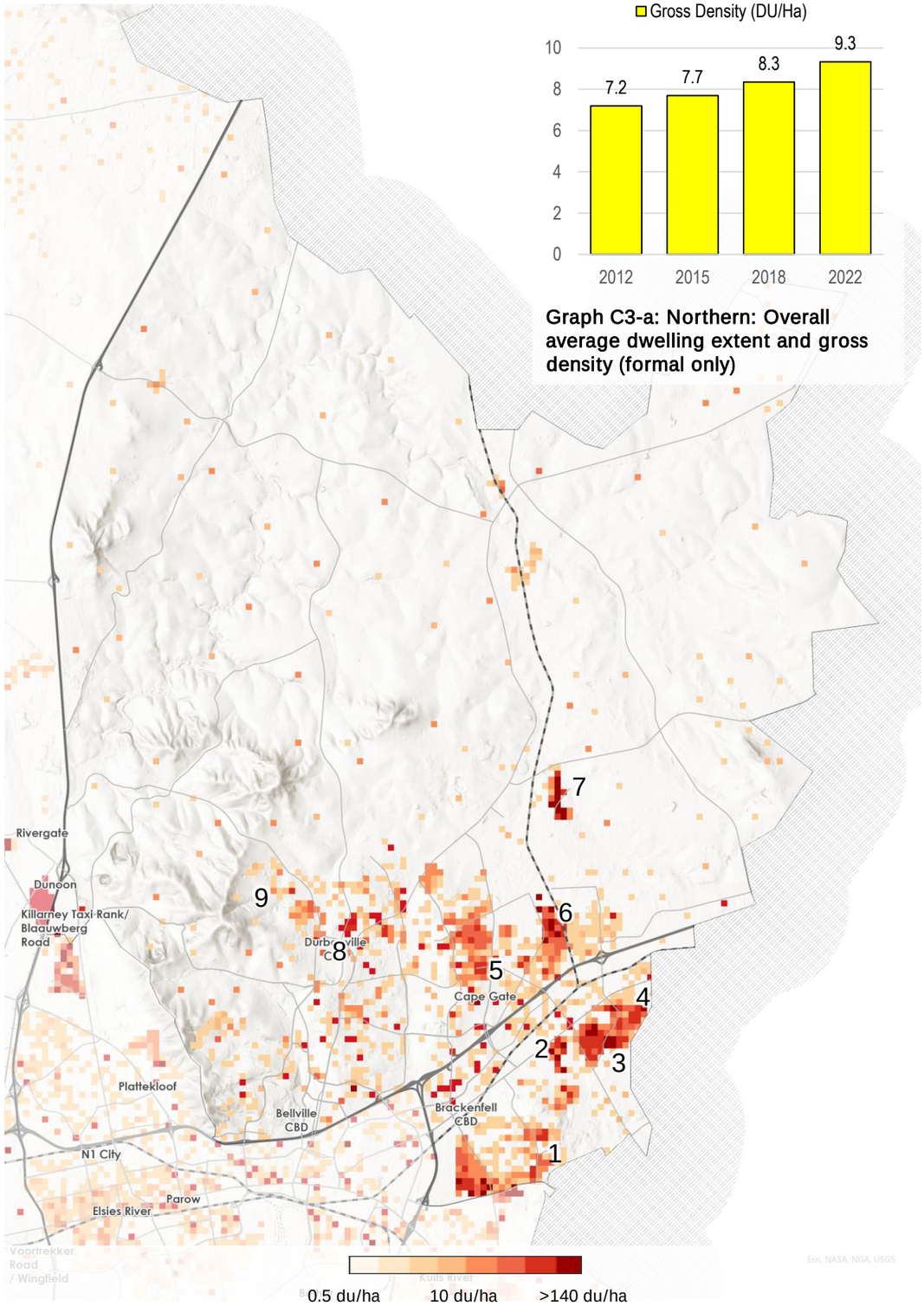
C.3

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



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

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

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)

LOCAL LEVEL TRENDS

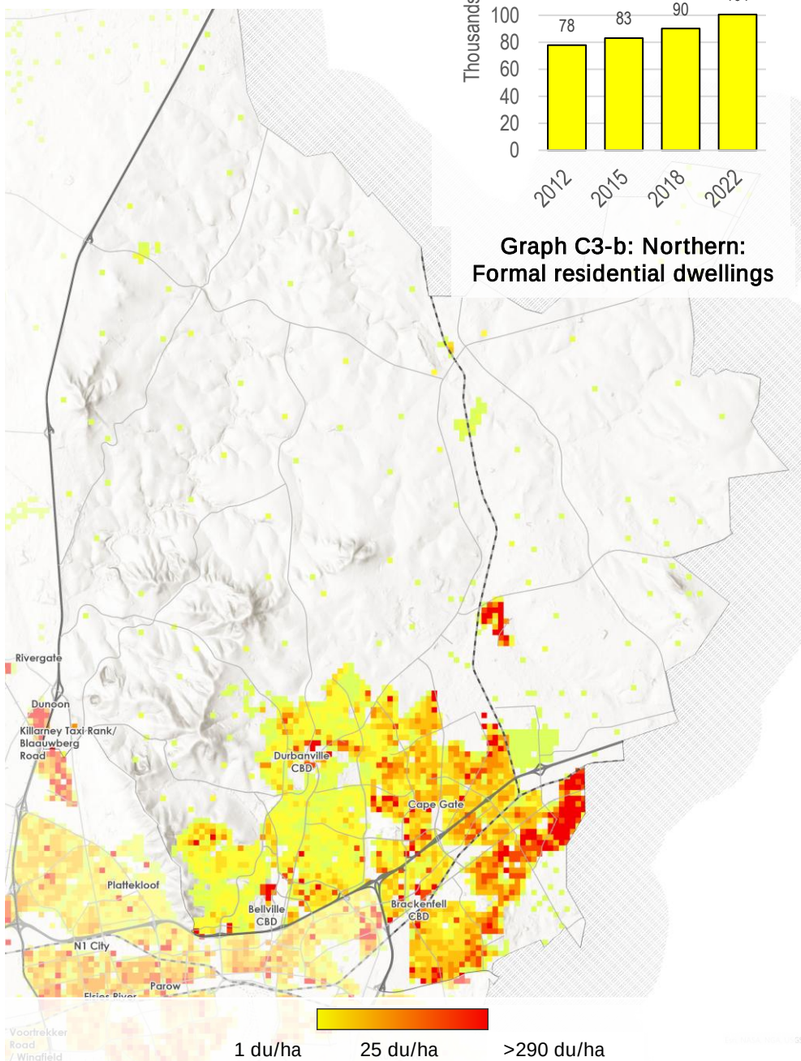
Primarily the trends (densification) in the Northern District relate directly to proposals made in the approved District Plans (mostly NDA's). However, the impact can also be ascribed to incremental densification as described in the Densification Policy, especially in lower-density older single residential 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)

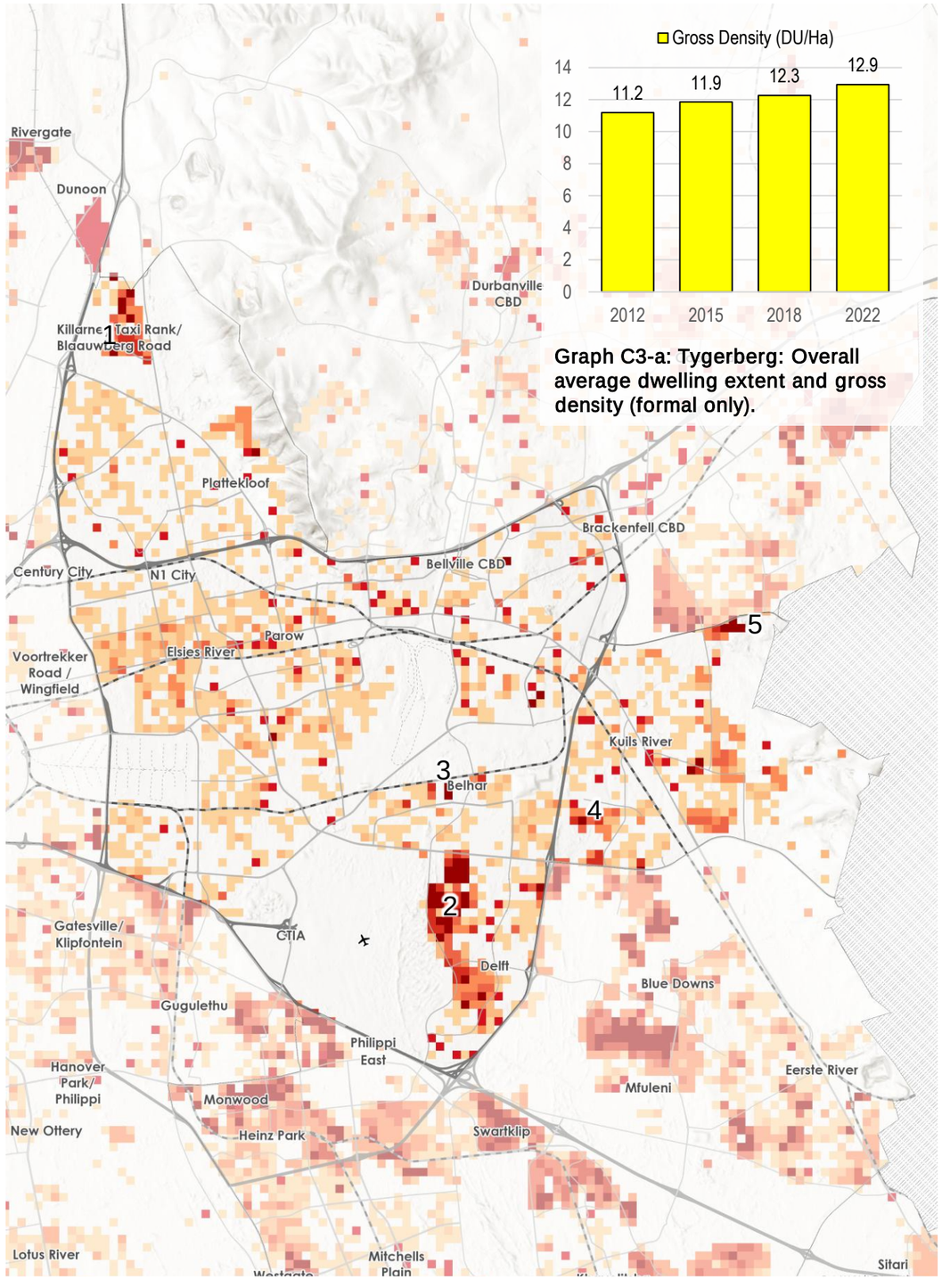
C.3

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)

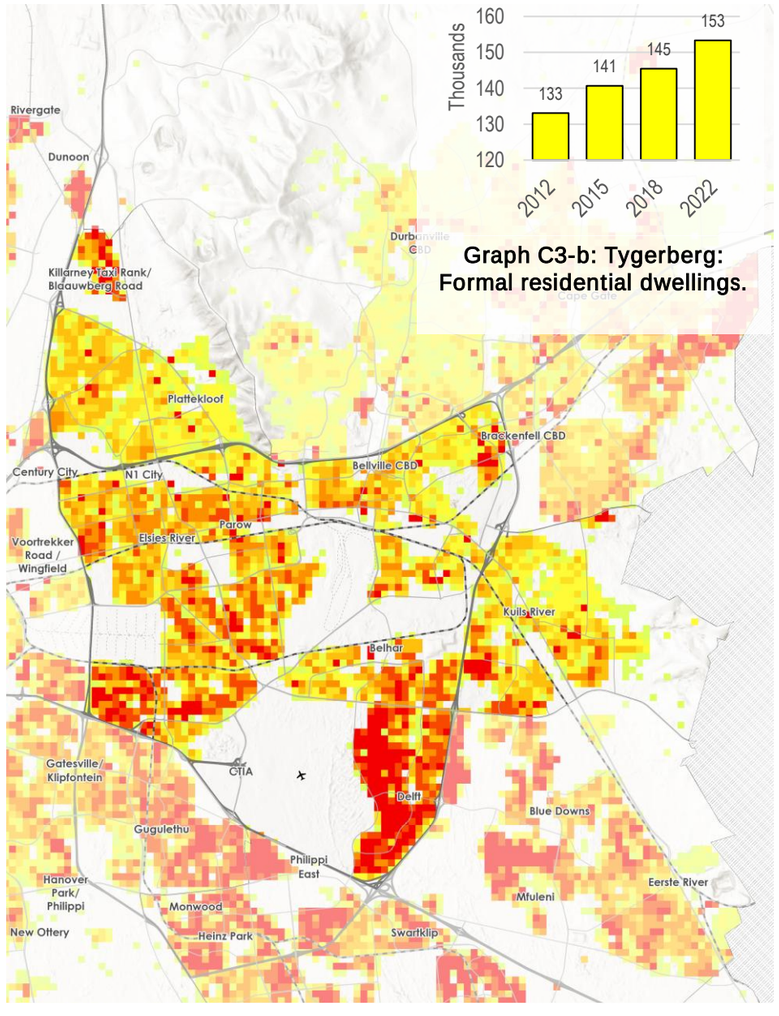
ALIGNMENT TO SPATIAL POLICY

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)

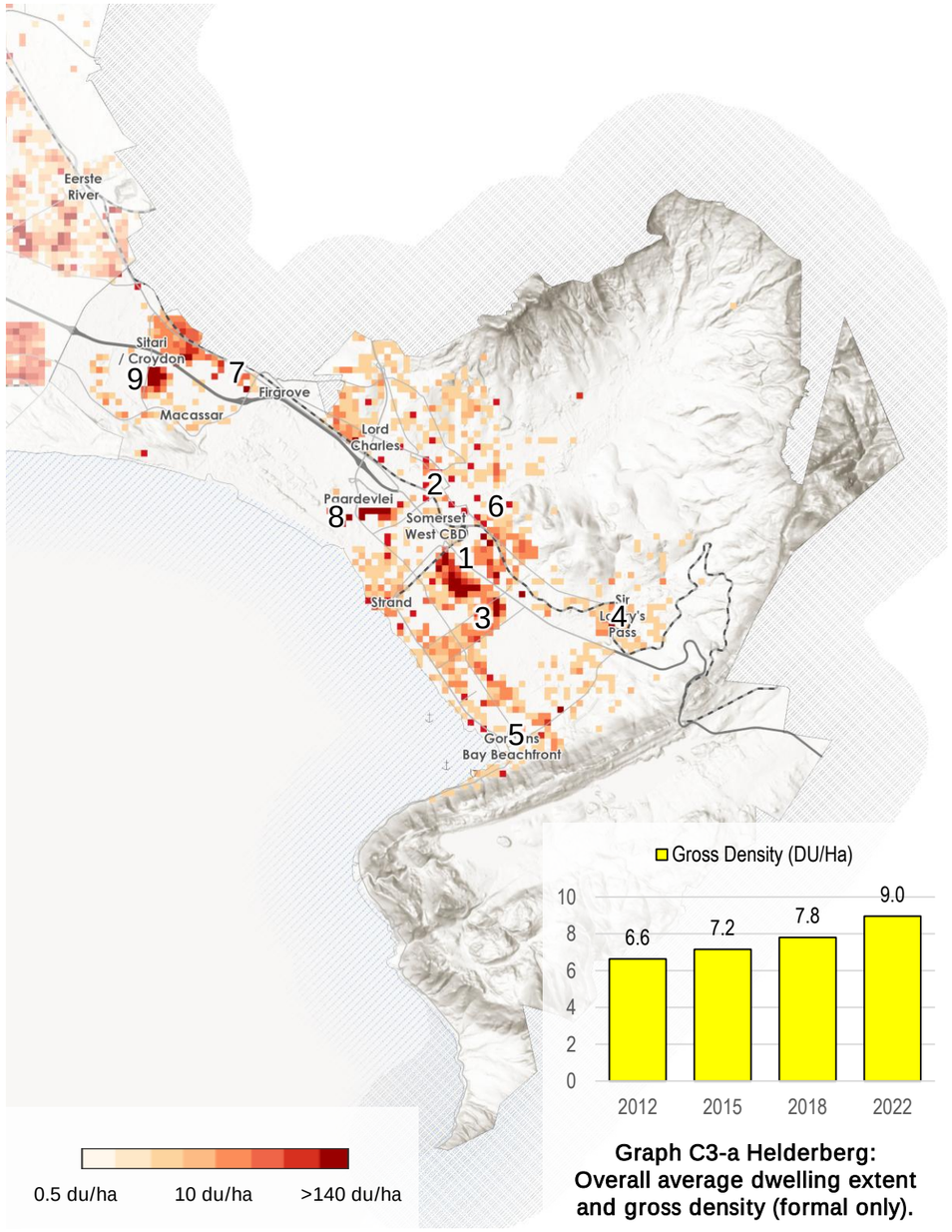
C.3

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.

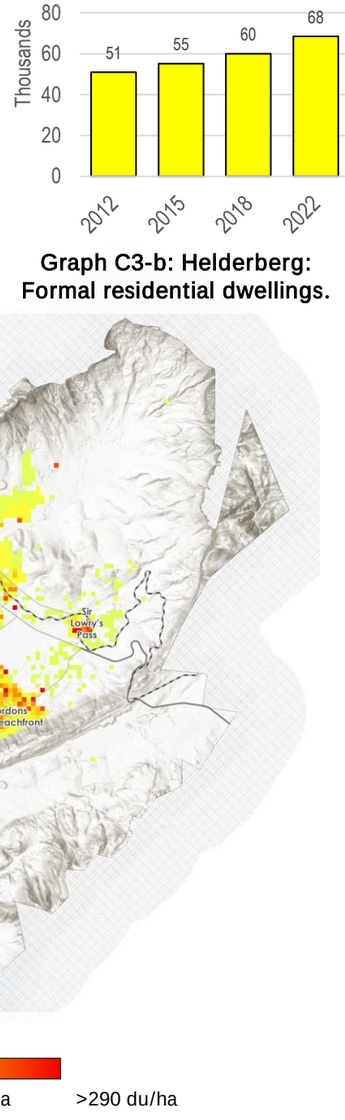
DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)

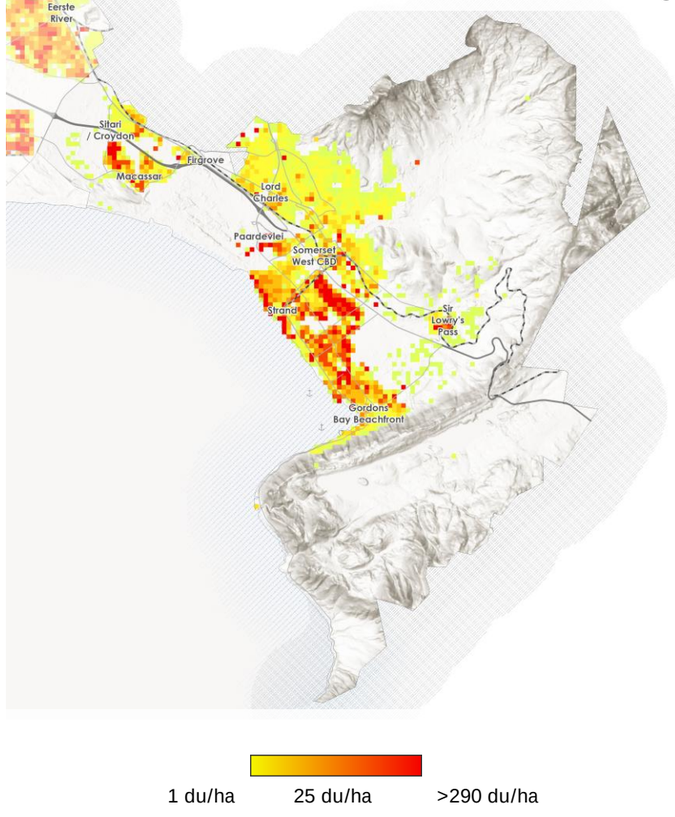
LOCAL LEVEL TRENDS

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).

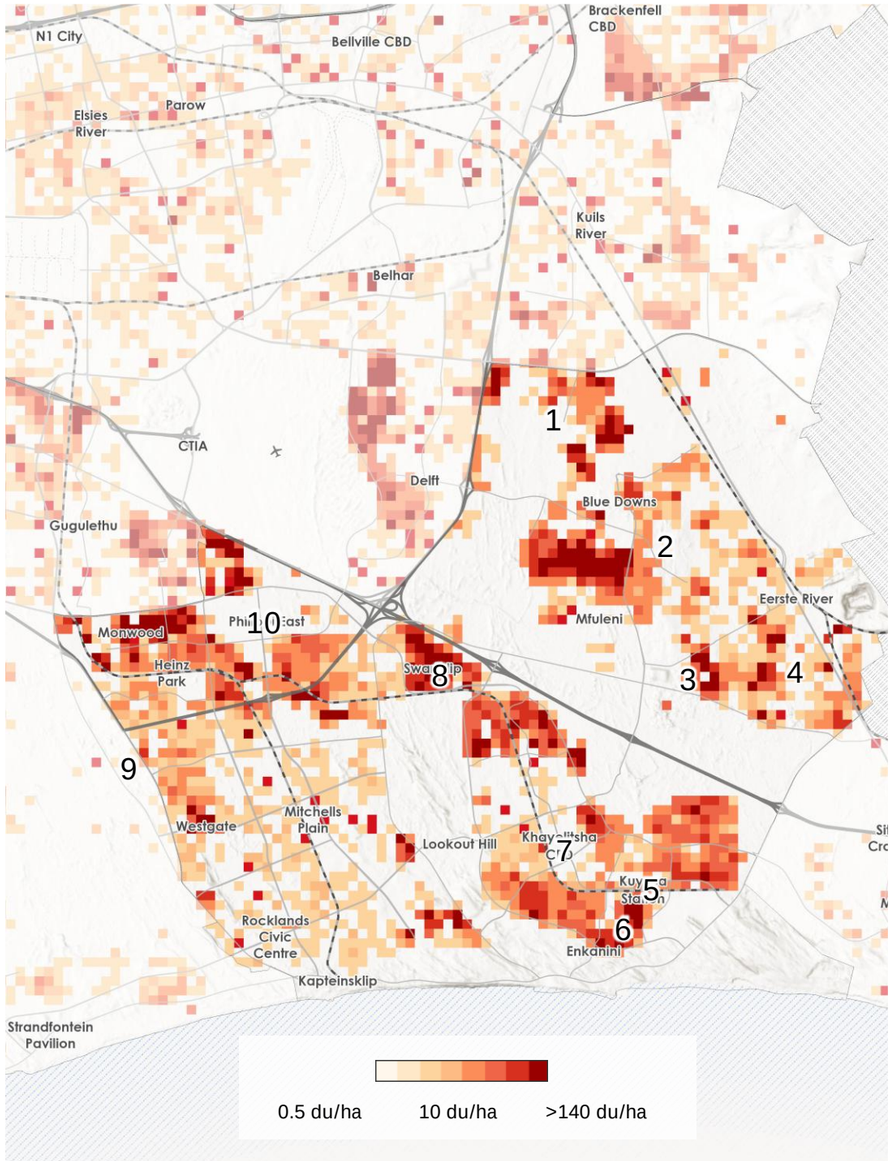
C.3

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.

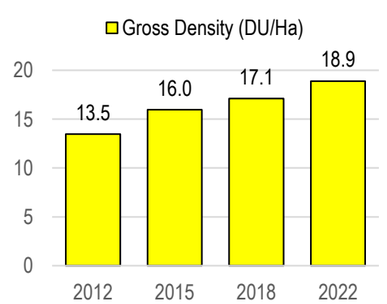
Source: CCT Valuation Rolls 2012, 2015, 2018 and 2022



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)

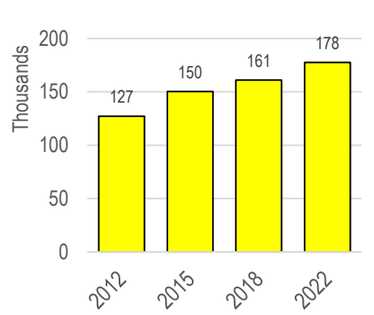
DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)

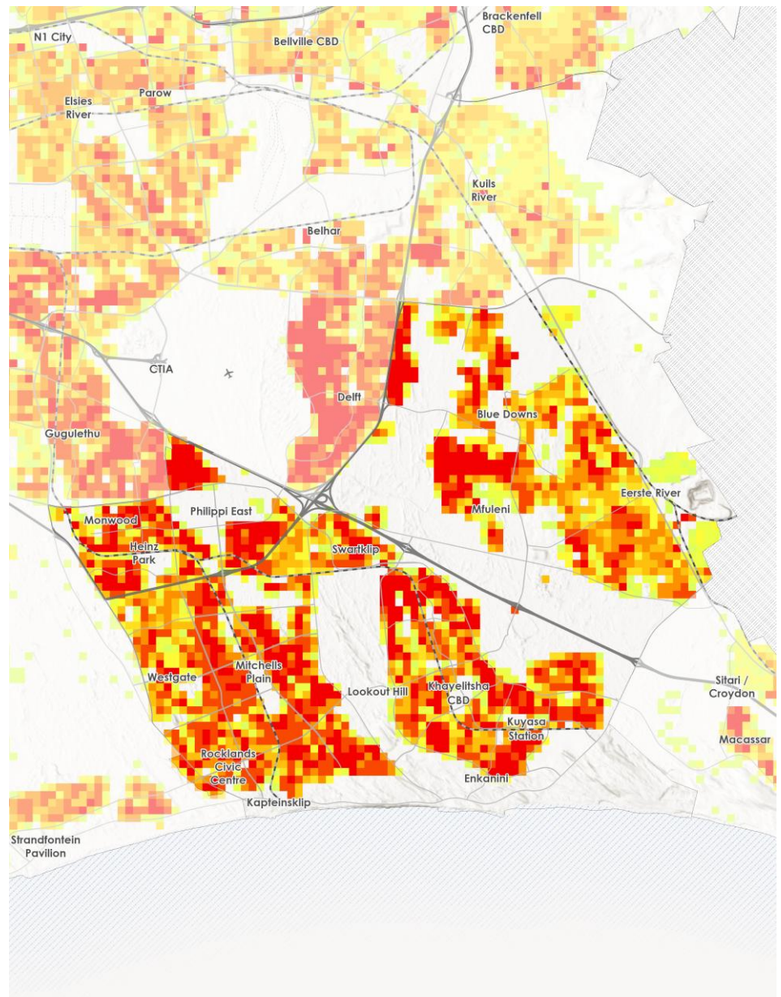
LOCAL LEVEL TRENDS

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)

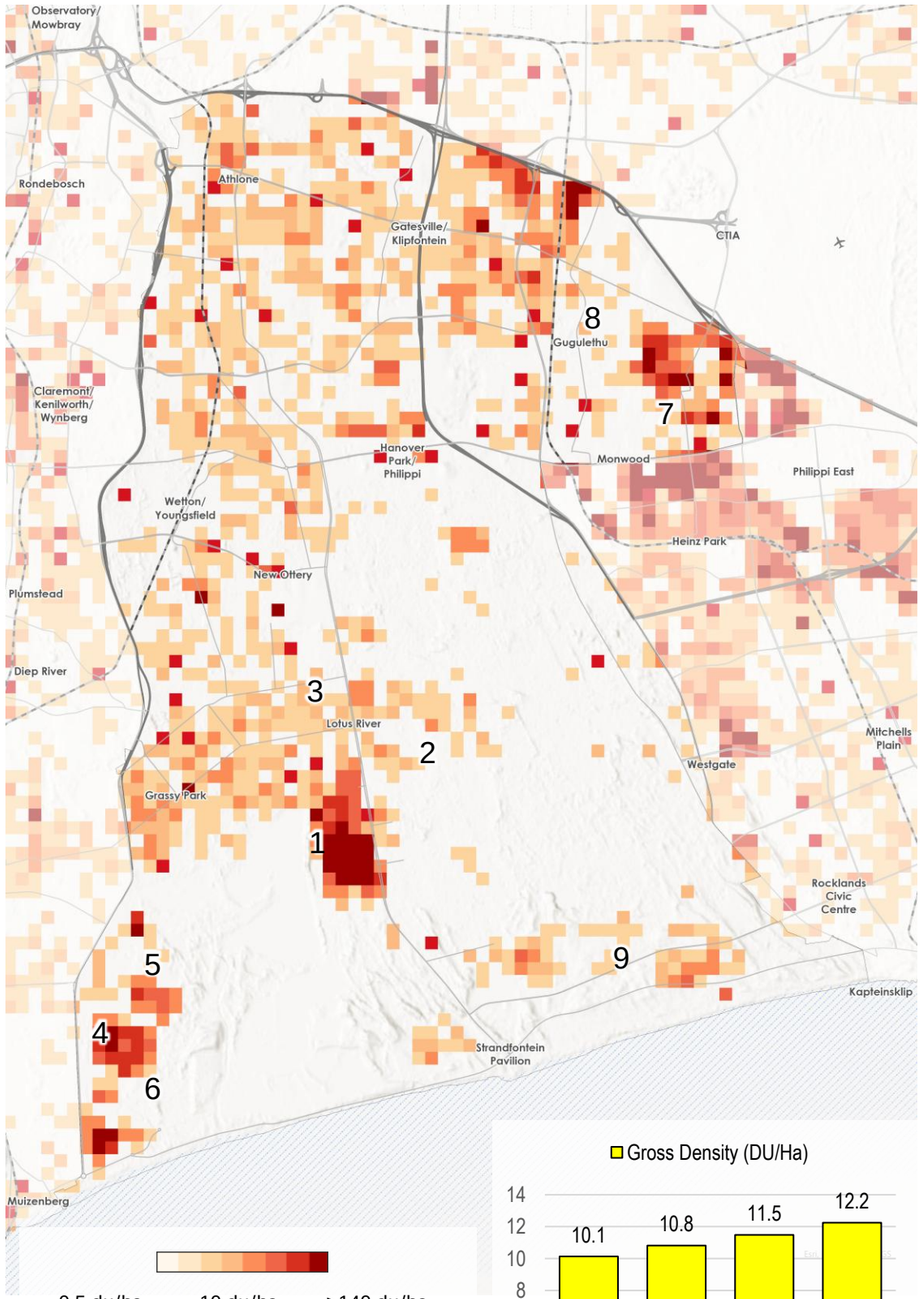
C.3

LAND AND BUILDING DEVELOPMENT

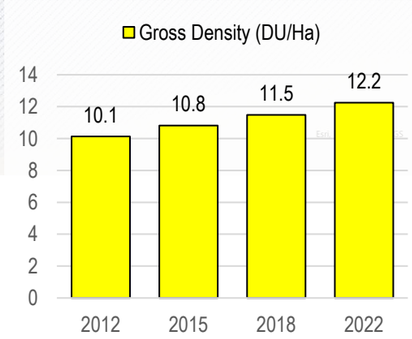
FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

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

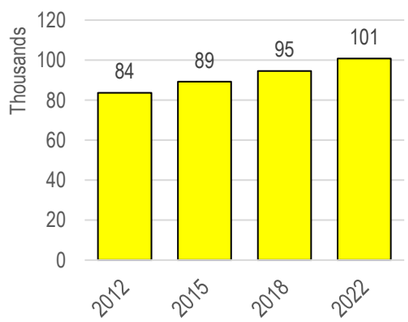
The Cape Flats District is characterised by consistent low-scale/incremental densification through predominantly single-residential development across the district over this period. Areas of greatest increases in residential density in the district are associated with government-subsidised housing projects 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.

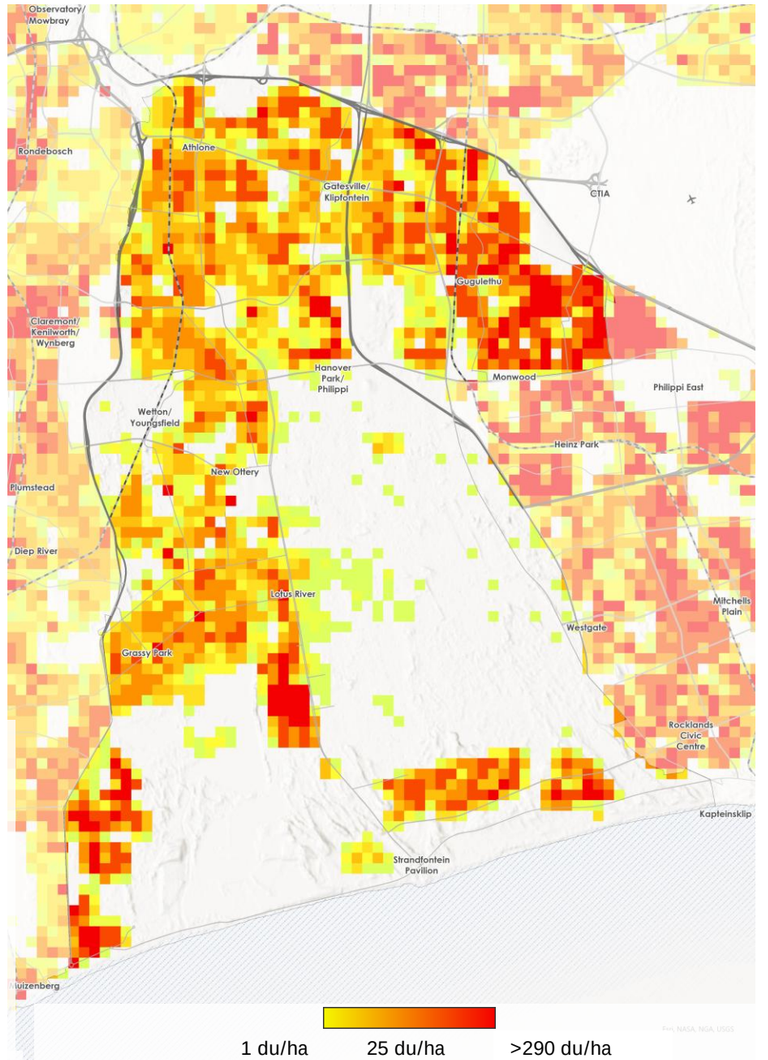
[2] Schaapkraal area has also seen significant change in density through incremental densification (small-scale subdivisions) and the development of flats closer to the [3] Lotus River node (more subdivision and rezoning applications for densification have been received in the past three years – the 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)

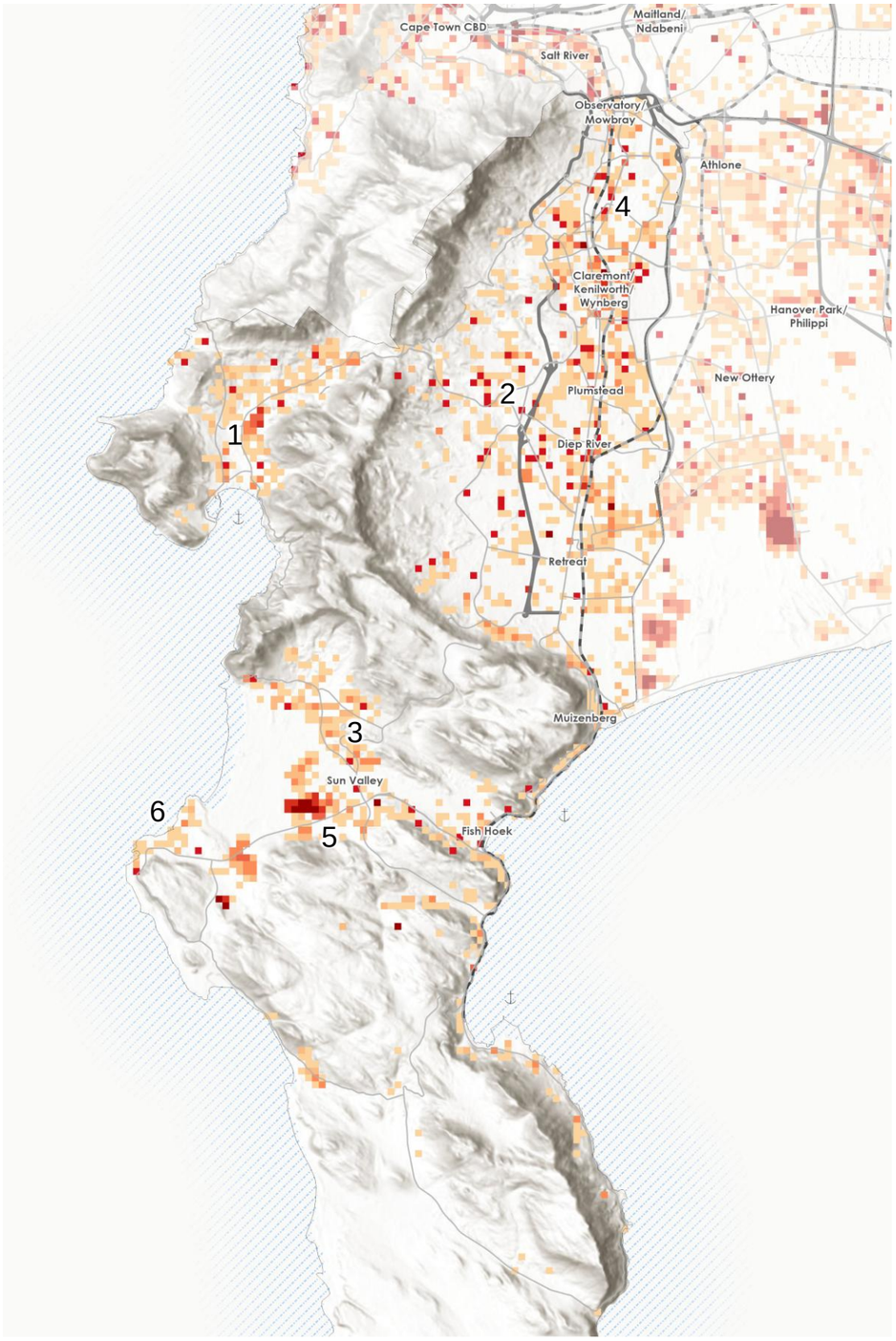
C.3

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

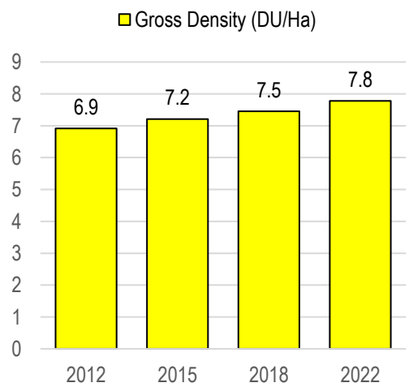
Change in formal residential density in the Southern District has comprised of three distinct types. The most widespread is small-scale incremental subdivisions happening in mainly peripheral low-density residential areas (in [1] Hout Bay, [2] Constantia – Tokai, and to a lesser extent the Far South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

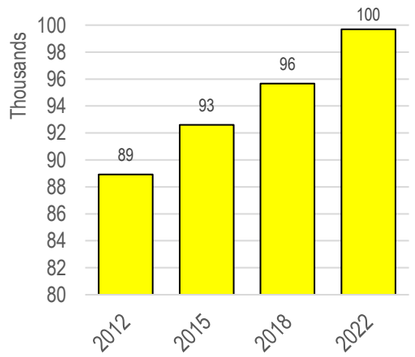
Finally, further densification, mainly of informal structure growth, has occurred in the low-income settlements of Masiphumele [5] and to lesser extent Imizamo Yethu, resulting in extremely high densities (and associated problems).

ALIGNMENT TO SPATIAL POLICY

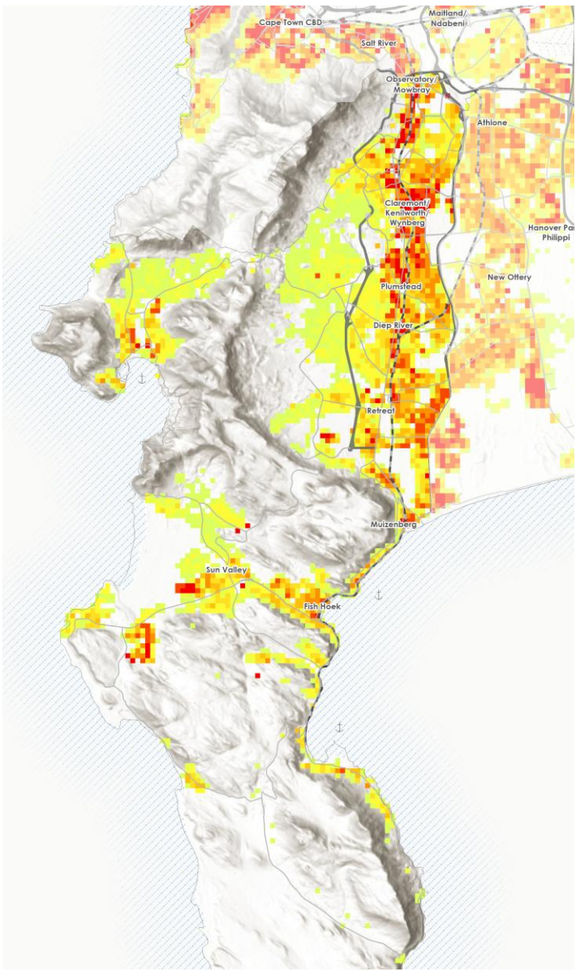
Little to no infill has taken place in identified NDA areas except for residential NDAs in the Kommetjie area [6]. Small-scale densification has however steadily continued in the northern part of Main Road corridor.



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)

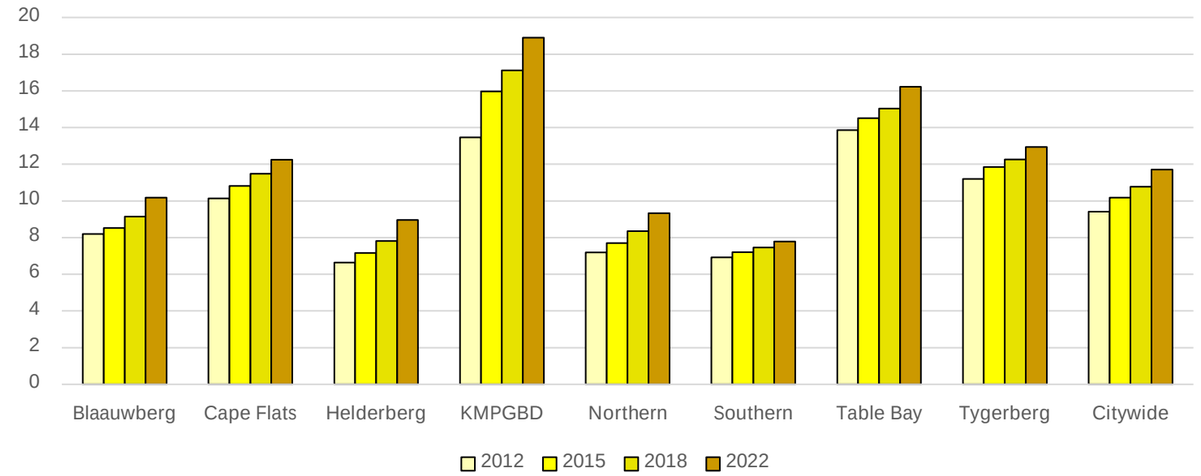
C.3

LAND AND BUILDING DEVELOPMENT

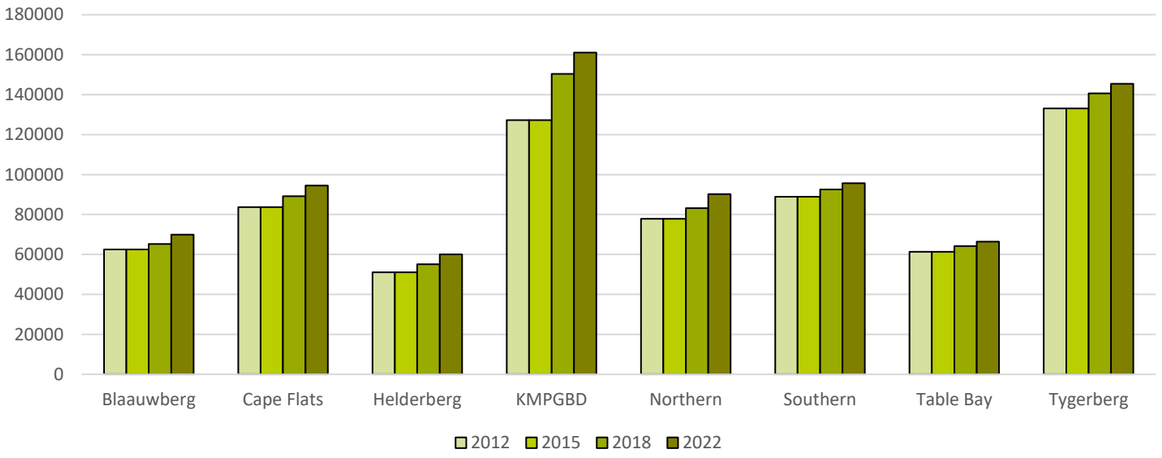
FORMAL RESIDENTIAL DENSITY (DISTRICT ANALYSIS)

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.

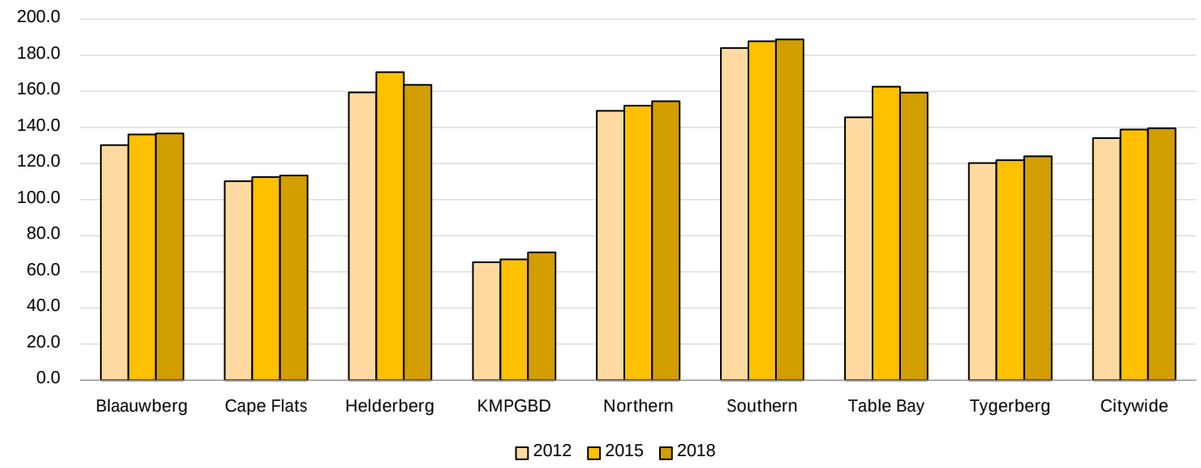
Source: CCT Valuation Rolls 2012, 2015 , 2018 and 2022



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

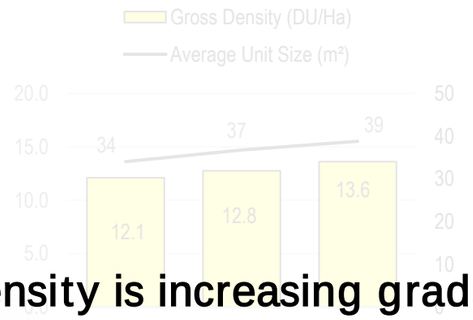
KEY TAKE-AWAY TRENDS

- **Gross density is increasing gradually**. From 2018 - 2022, formal gross density grew 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 peripheral 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. Taking place in areas such as the **CBD and Woodstock and Salt river.**

- **Continued land use intensification** of existing residential land uses (i.e. from single residential development to flats) especially **in development corridors and nodes**.



Graph C3-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 uses 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. Limited new clusters of non-residential land use have emerged.

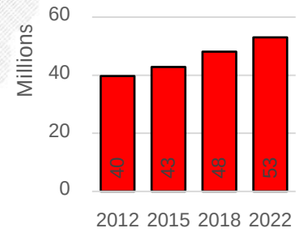
The distribution of non-residential land use reflects location preferences of the various underlying sectors. This indicator does not analyse the different non-residential property sectors or different economic sectors, e.g. this does not indicate what type of non-residential development took place where. This is done in other indicators.

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

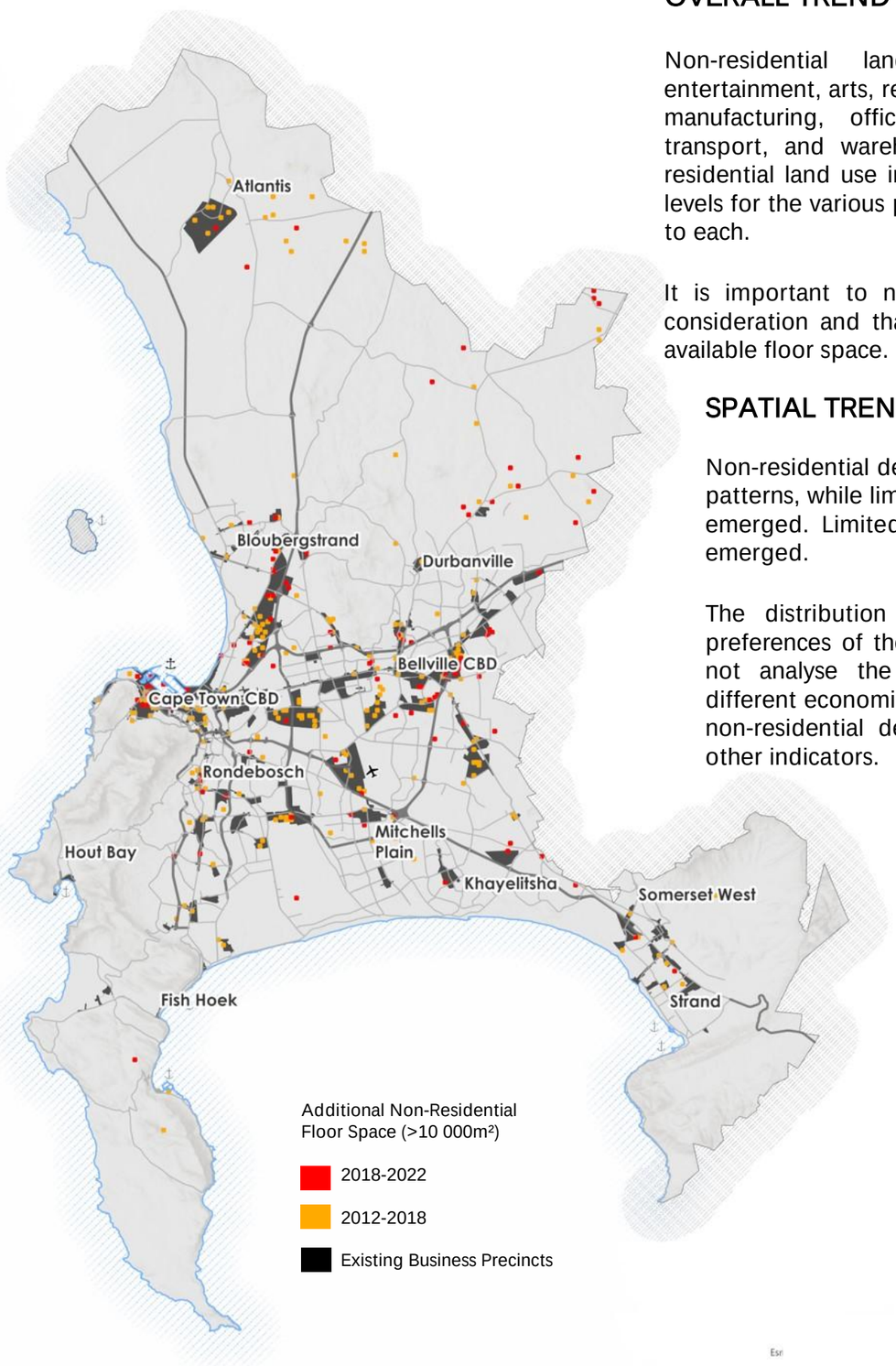
- The most notable increases in non-residential development occurred within established business precincts pointing to a tendency to agglomerate.
- The CBD, Foreshore, V&A Waterfront, Century City, Killarney Gardens, Montague Gardens, as well as Bellville South, and specifically Brackengate and Blackheath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

GENERAL ANALYSIS

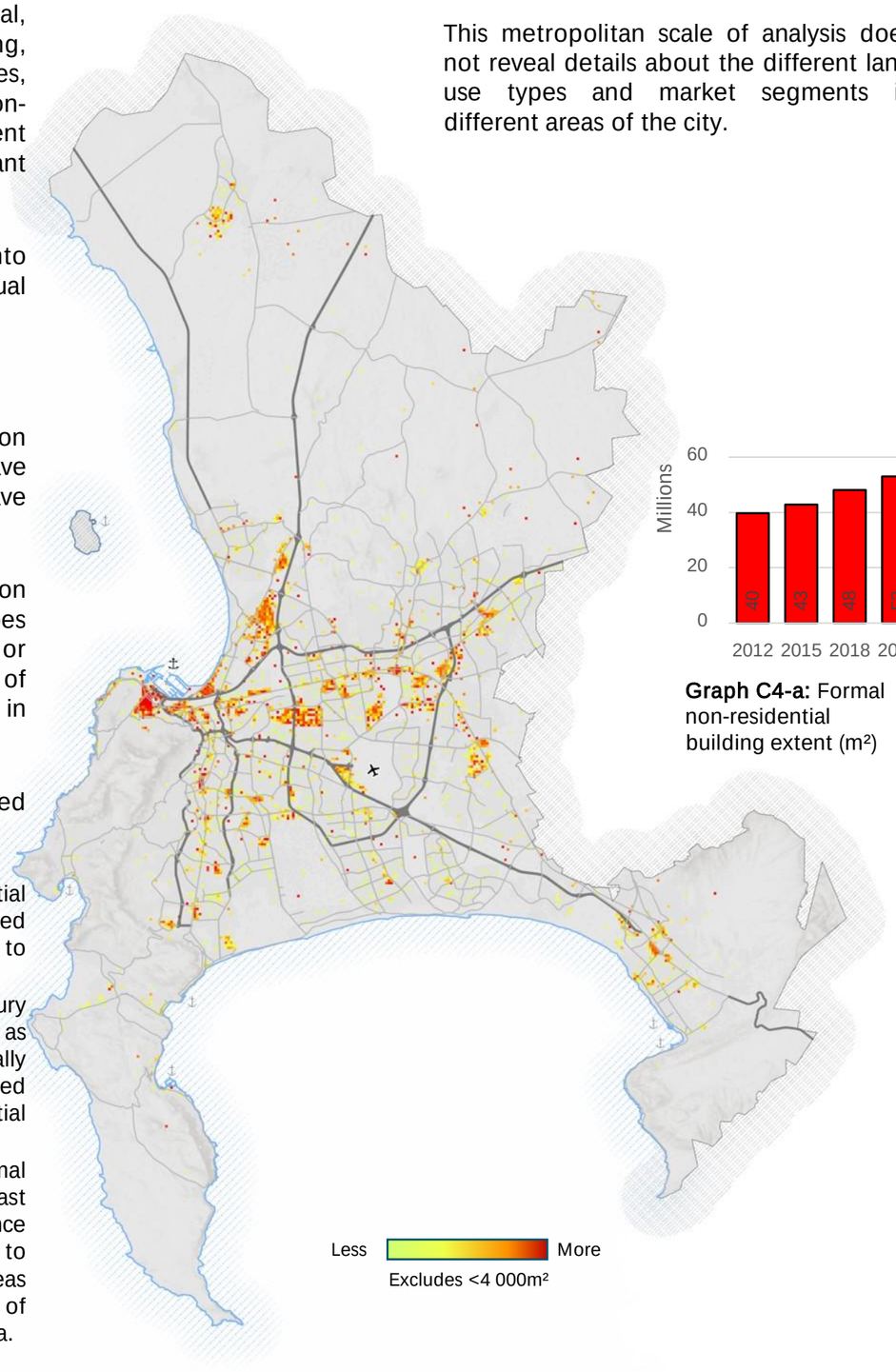
This metropolitan scale of analysis does not reveal details about the different land use types and market segments in different areas of the city.



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



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



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

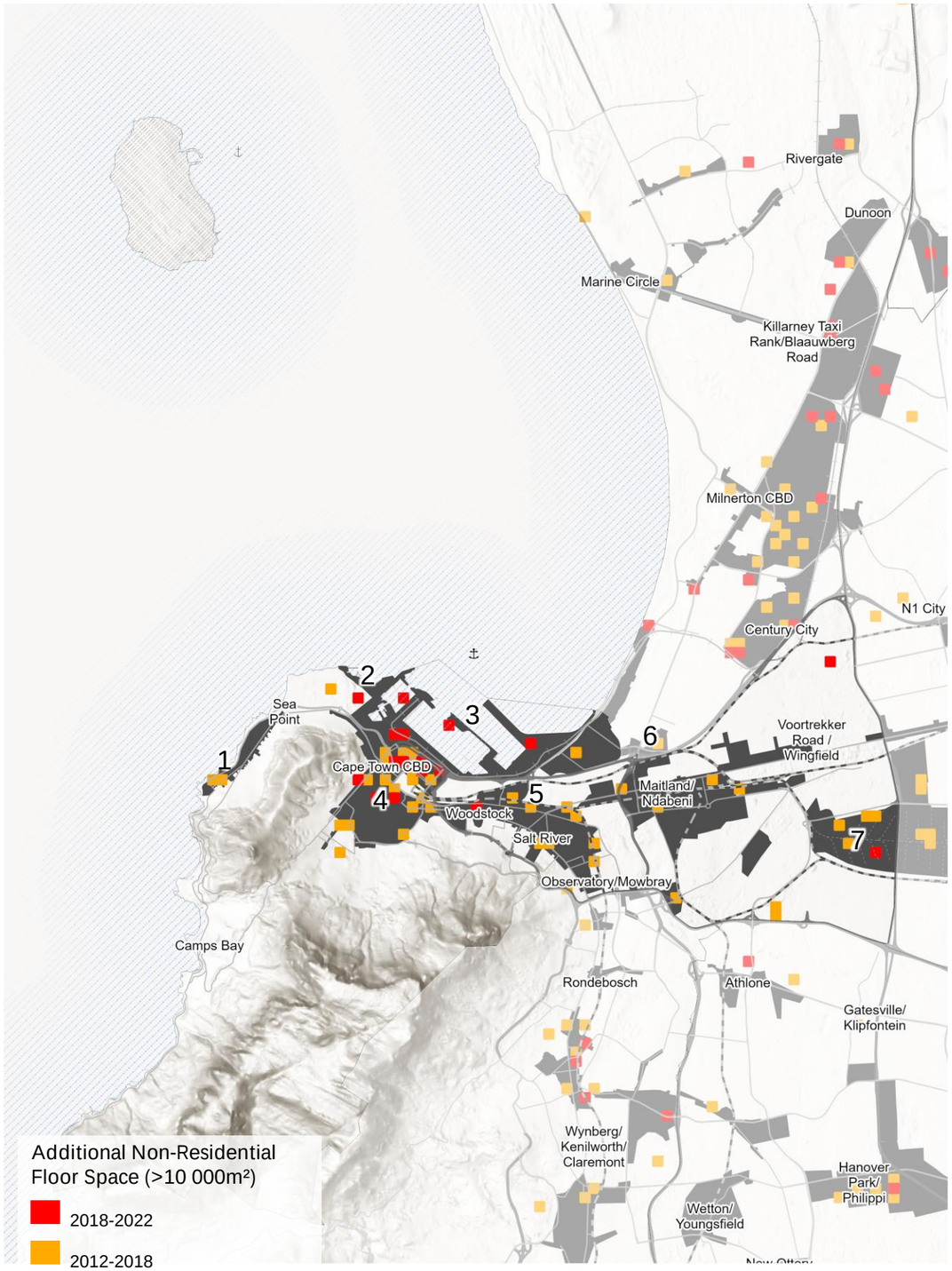
C.4

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

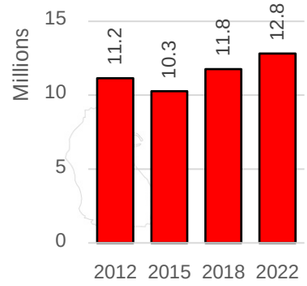
TABLE BAY DISTRICT (A)

ALIGNMENT TO SPATIAL POLICY

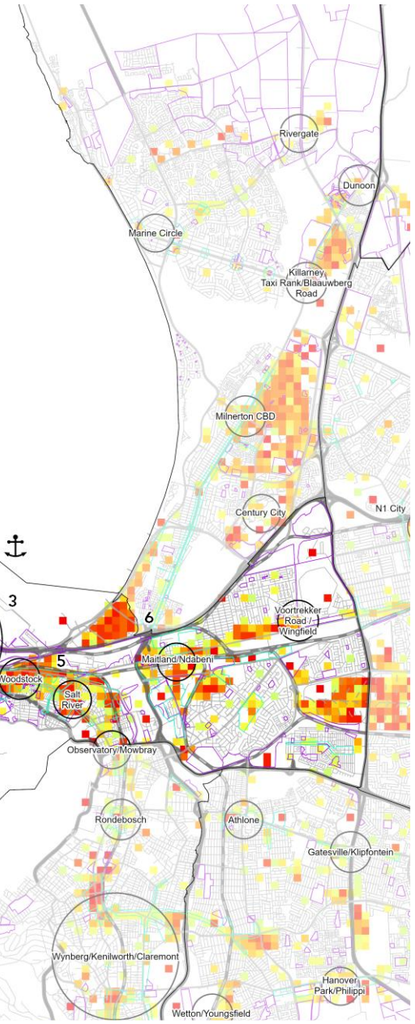
All of these non-residential (new of re-developments) are in-transit and employment-accessible, mixed-use areas, either within or in proximity to nodes and corridors and aligned to spatial planning policy (located in identified business precincts).

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)

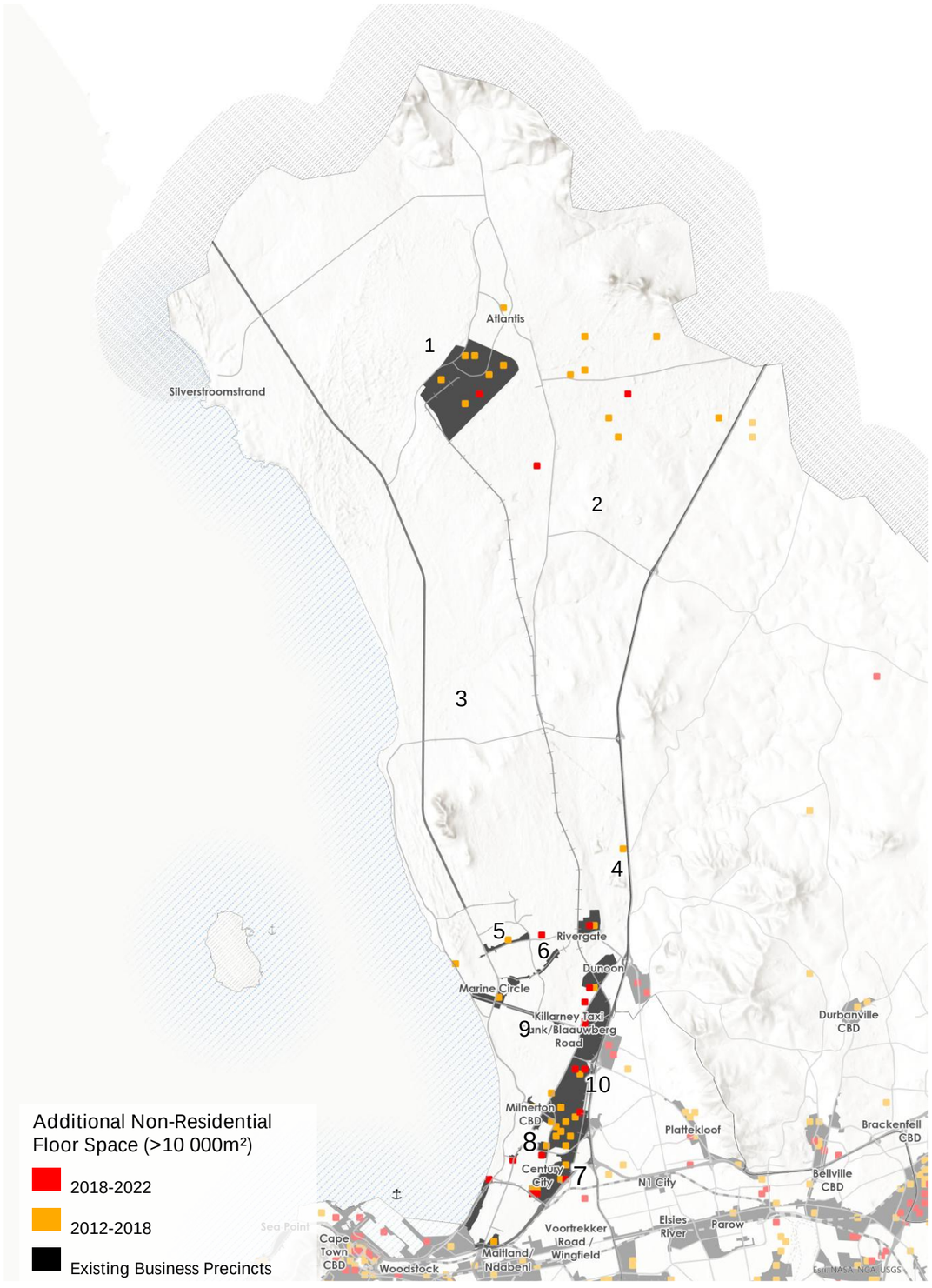
C.4

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

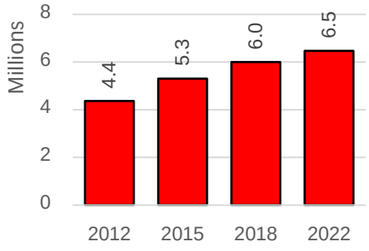
BLAAUWBERG DISTRICT (B)

ALIGNMENT TO SPATIAL POLICY

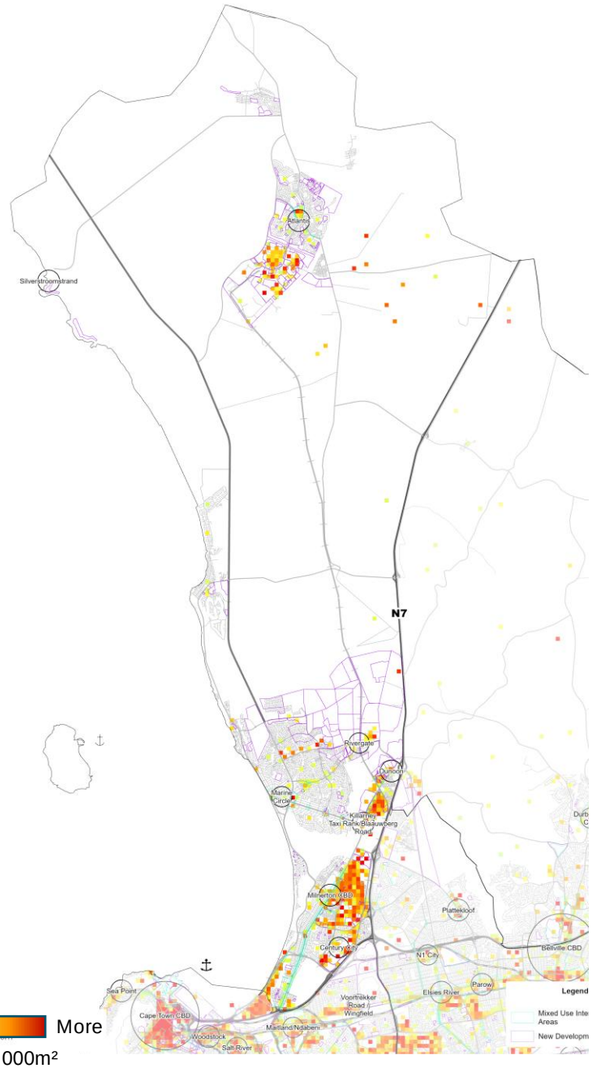
Growth in economic floor space continued in existing economic areas, and along the N7. Precinct management and active City Improvement Districts played a role in location choices of firms, driving the attractiveness of Montague Gardens and Century City.
A revitalised and people centred urban form, aligning 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)

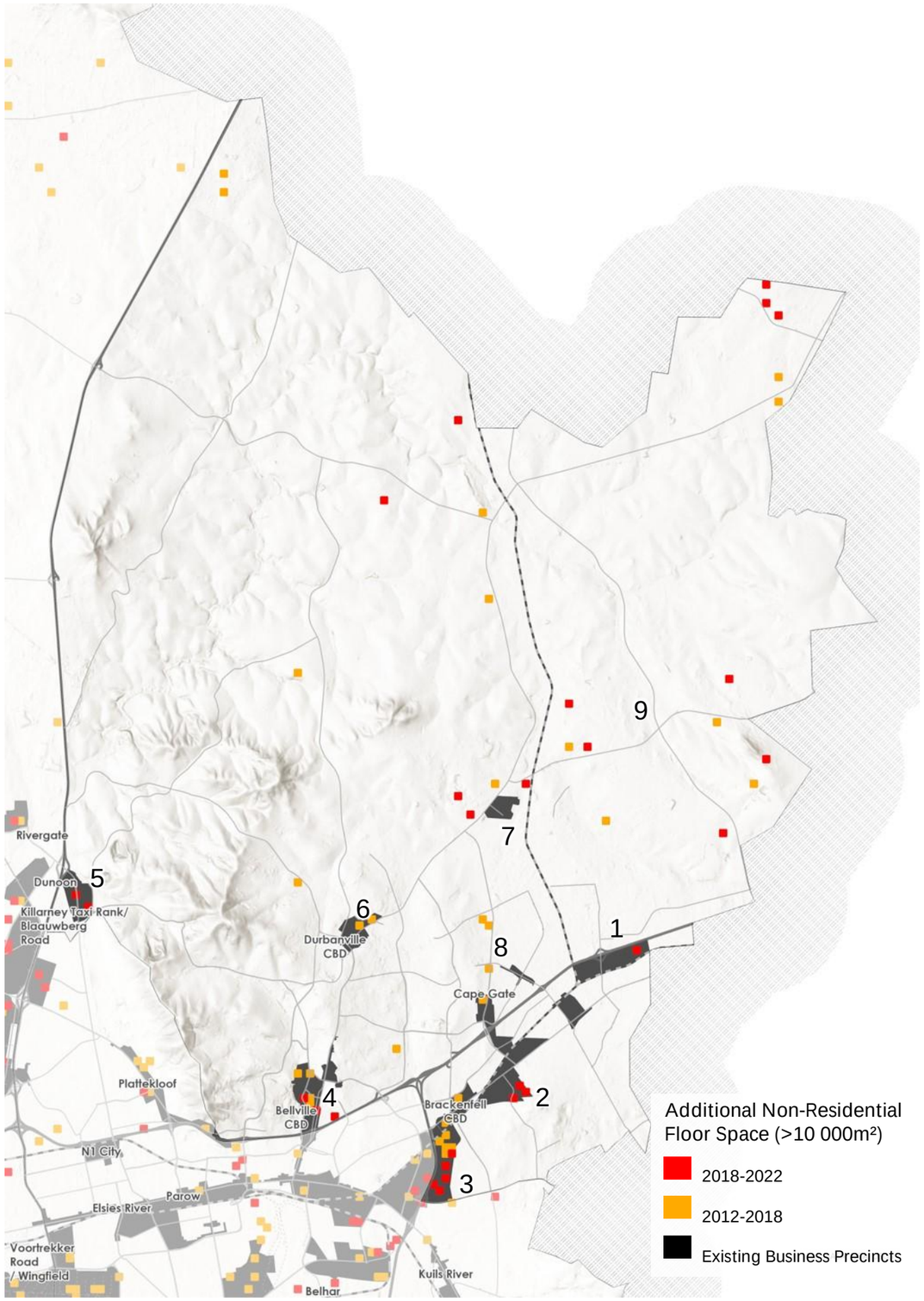
C.4

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)

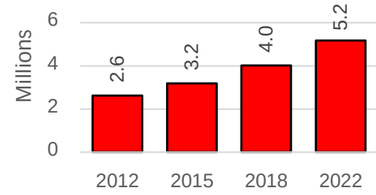
ALIGNMENT TO SPATIAL POLICY

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.

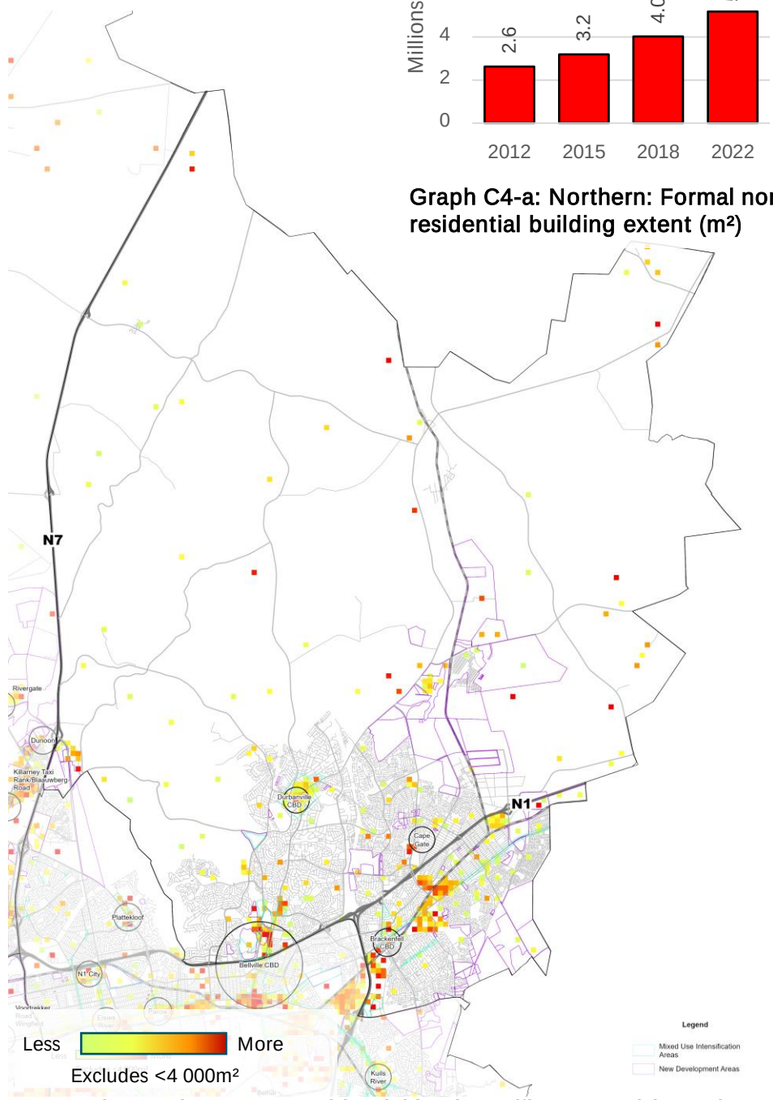
LOCAL LEVEL TRENDS

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)

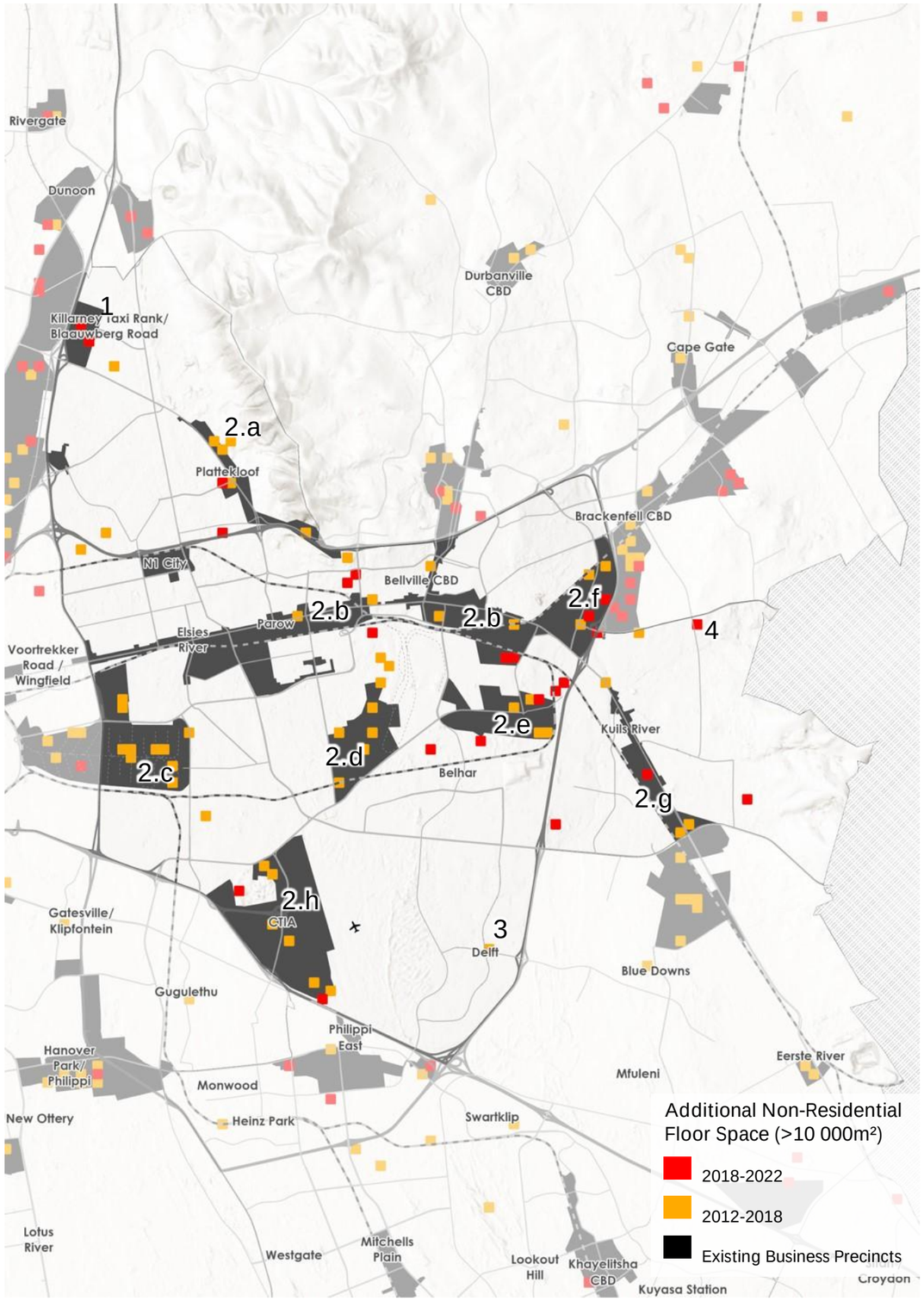
C.4

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)

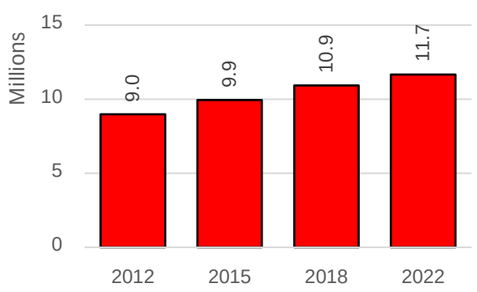
ALIGNMENT TO SPATIAL POLICY

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.

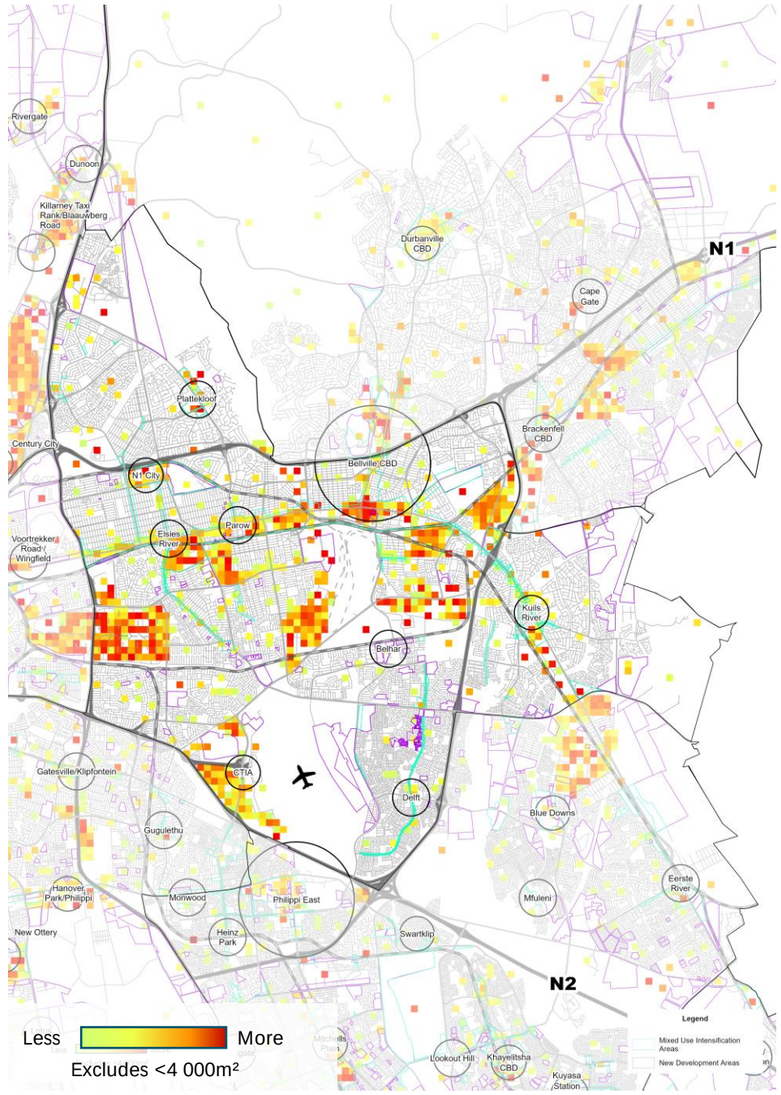
LOCAL LEVEL TRENDS

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)

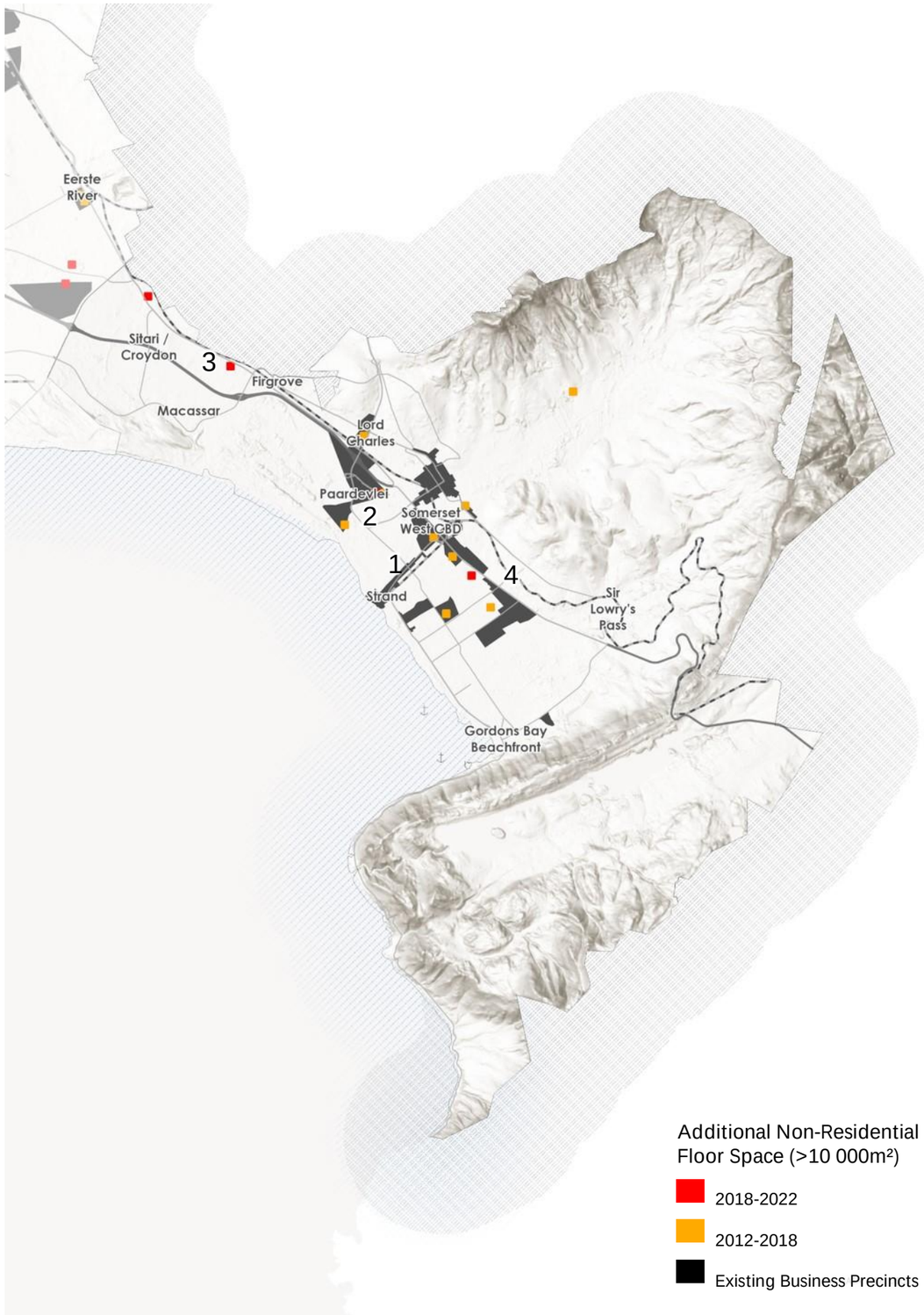
C.4

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

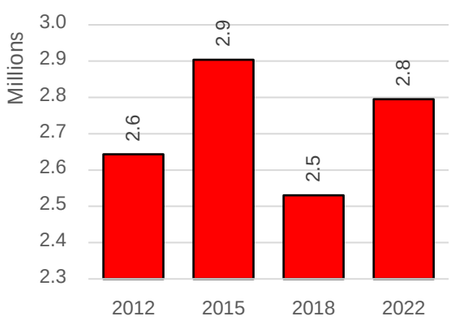
HELDERBERG DISTRICT (E)

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)

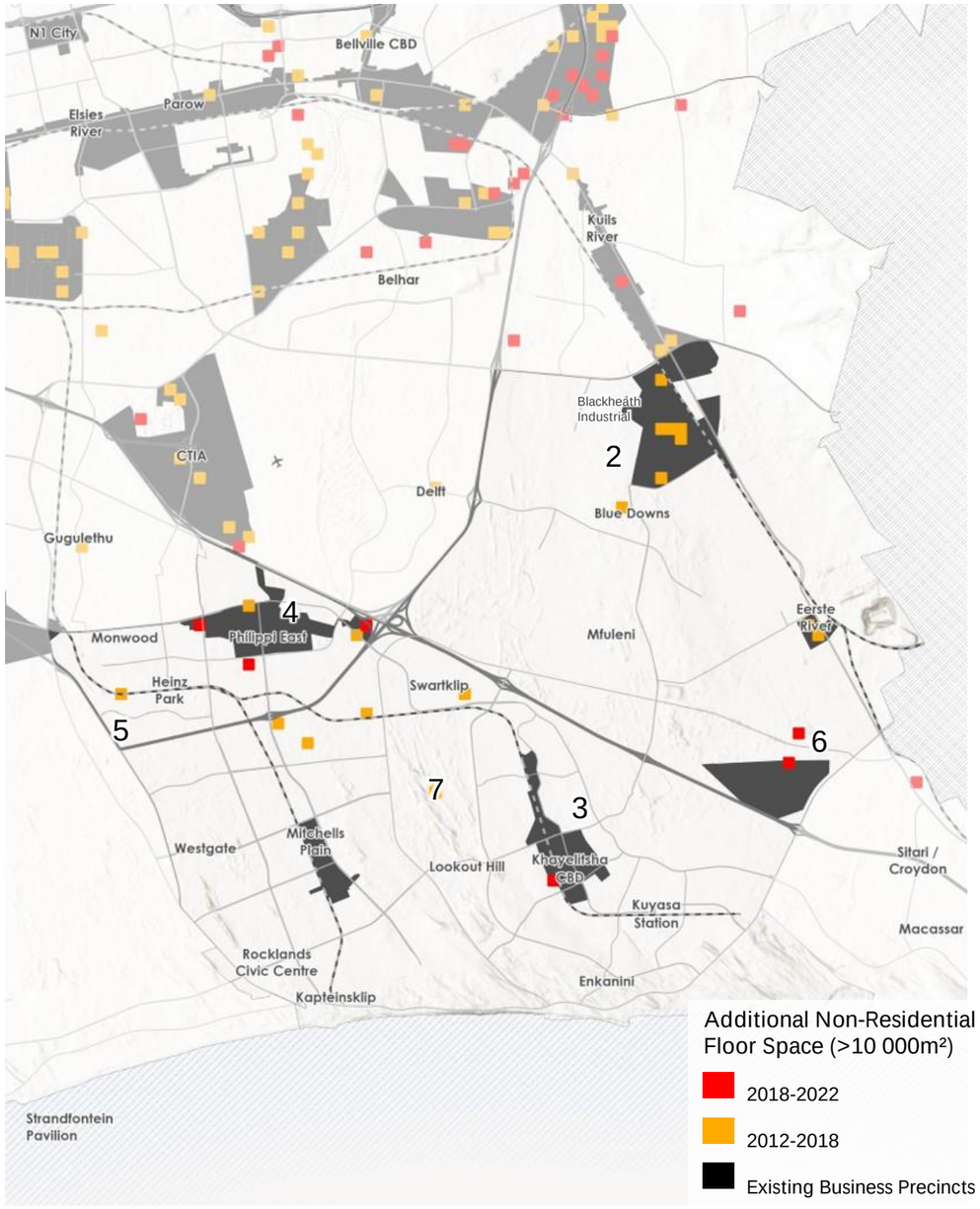
C.4

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

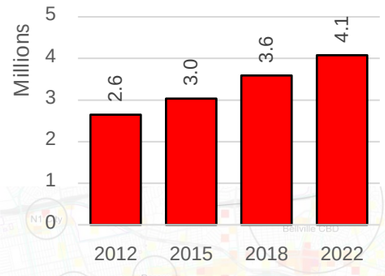
KMPGBD DISTRICT (F)

ALIGNMENT TO SPATIAL POLICY

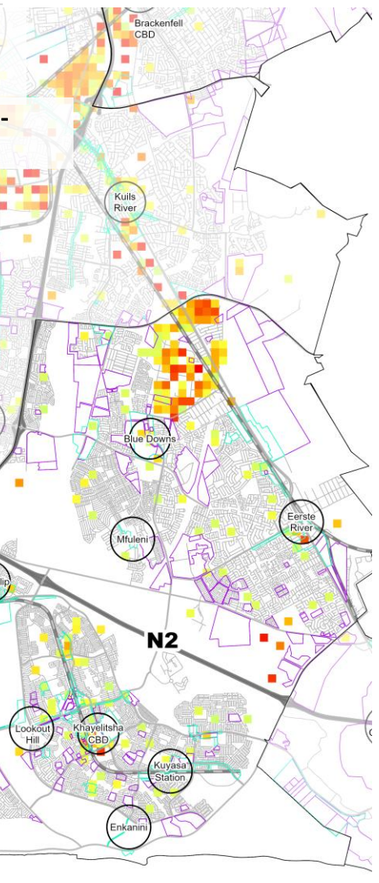
Most of the spatially targeted areas in the KMPGBD District plan have not seen much take up or appetite. However, a number of mixed-use intensification areas, have seen application submissions to take up the opportunities. While not significant development, it shows a promising trend that will hopefully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

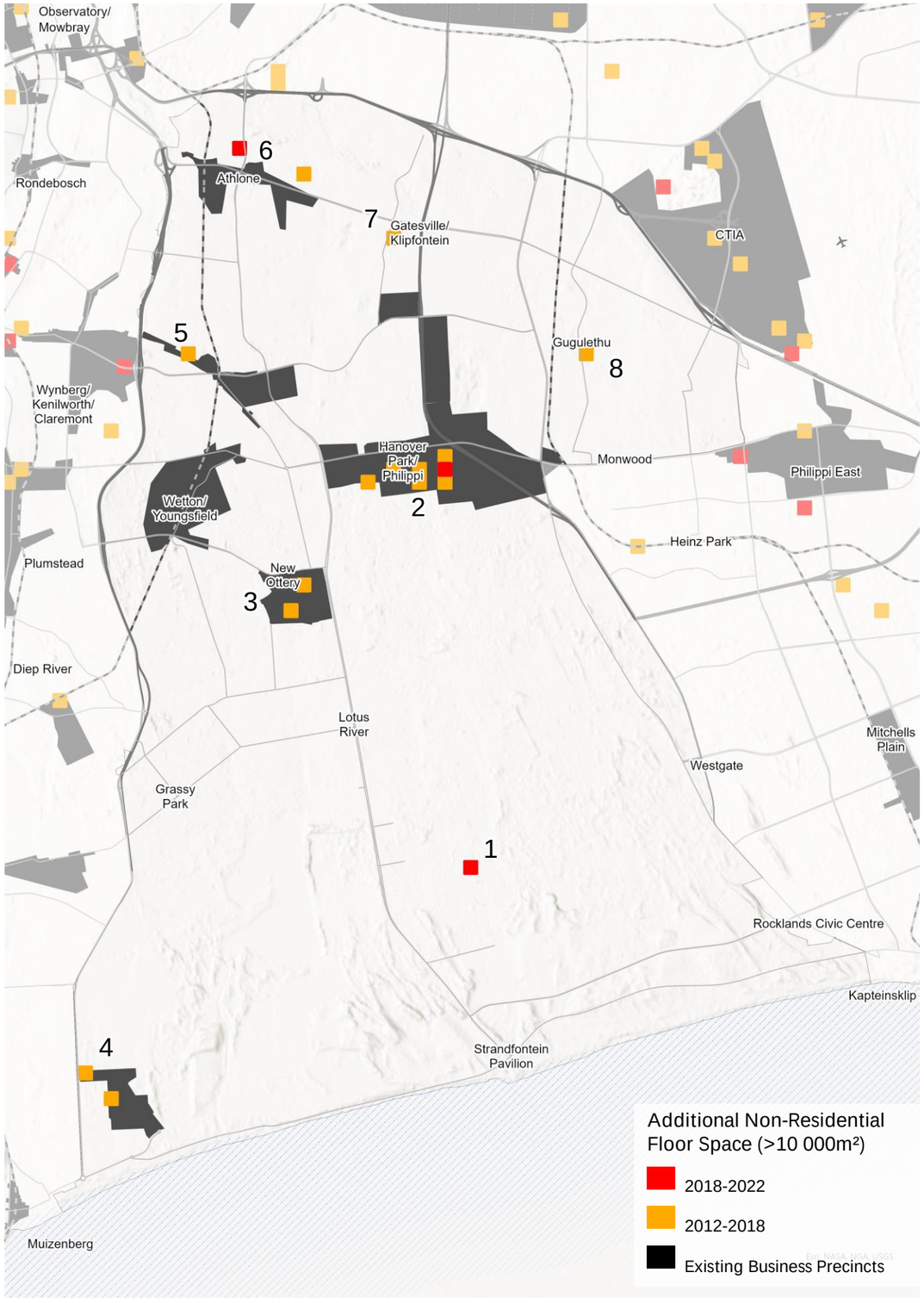
C.4

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.

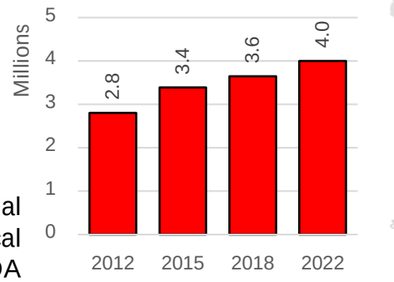
Source: CCT Valuation Rolls 2012, 2015, 2018, 2022



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

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)



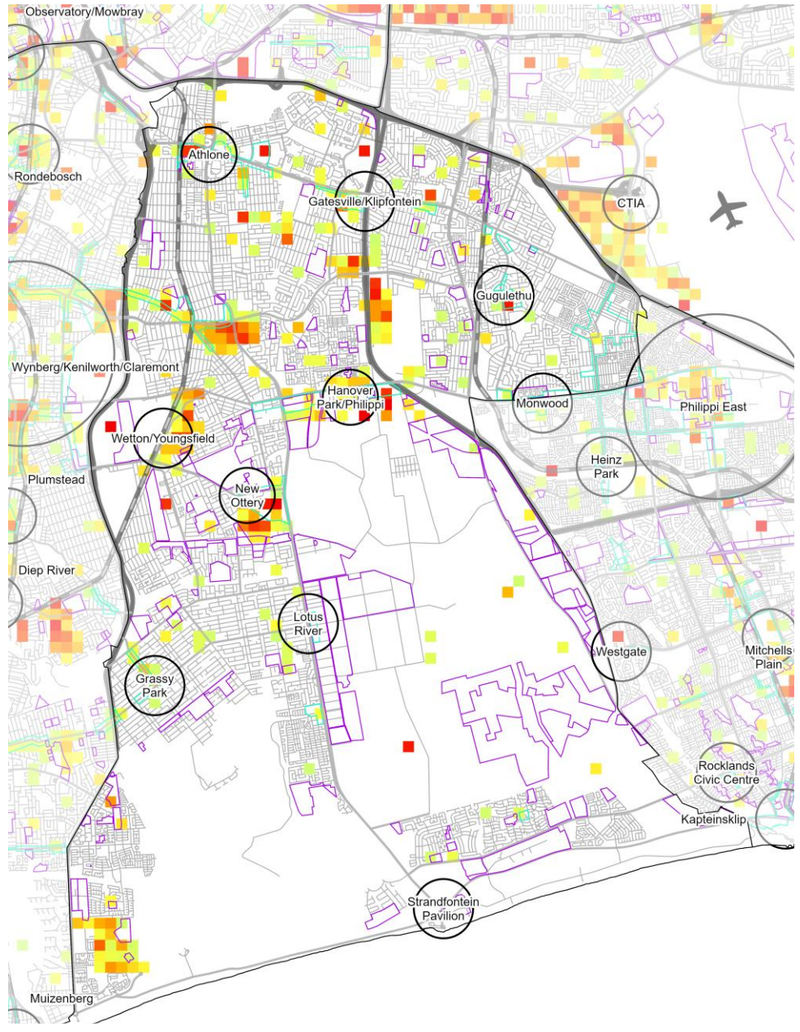
Graph C4-a: Formal non-residential building extent (m²)

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.

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)

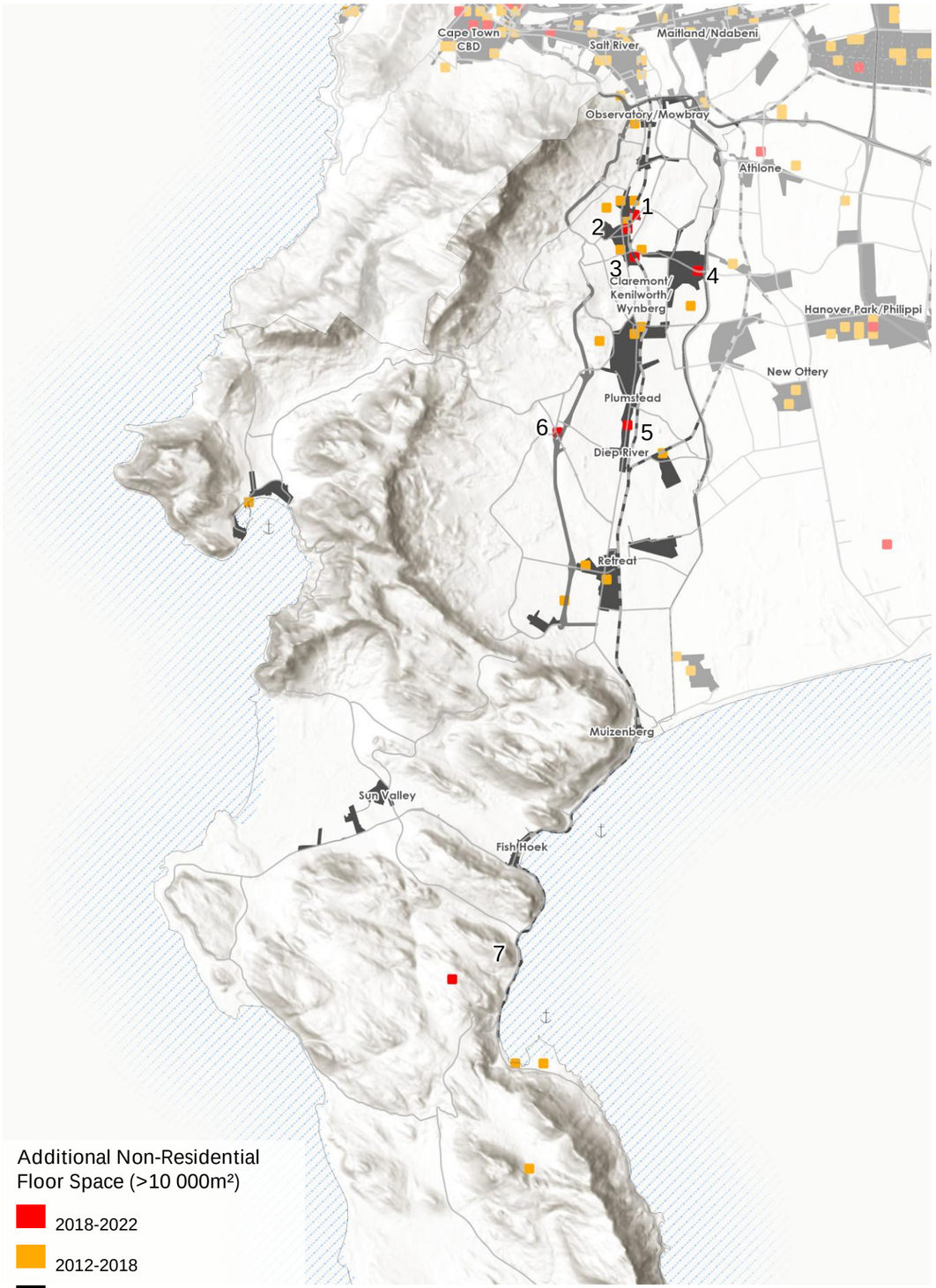
C.4

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)

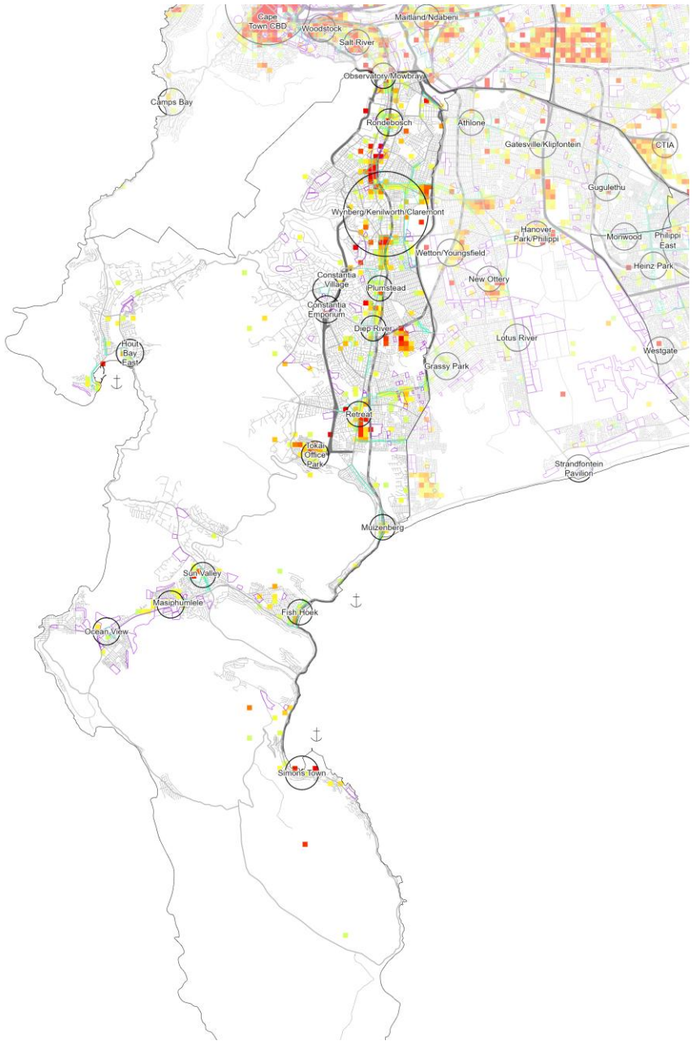
ALIGNMENT TO SPATIAL POLICY

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.**

- 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.

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.

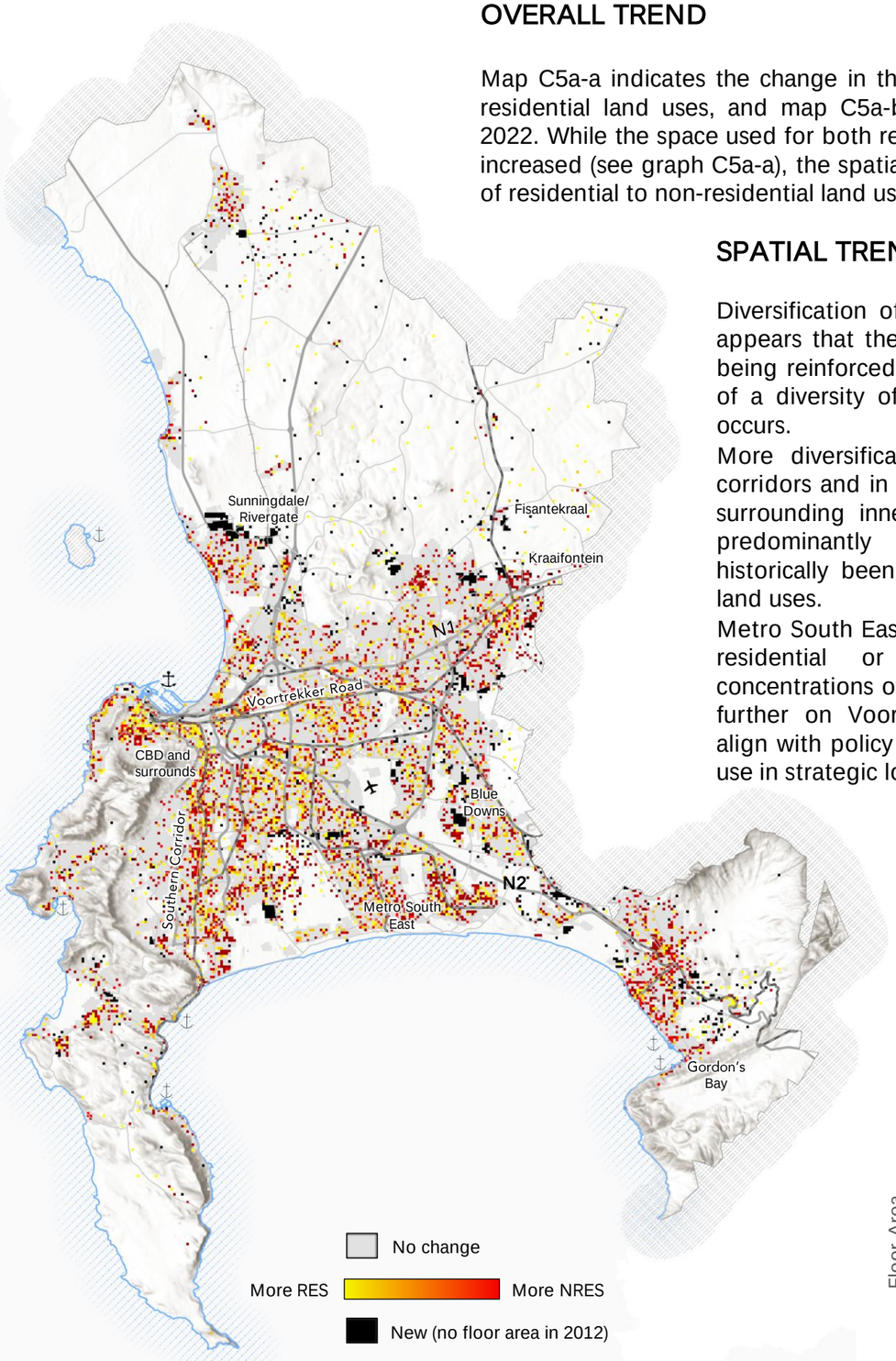
SPATIAL TREND (DISTRIBUTION/ PATTERN)

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.

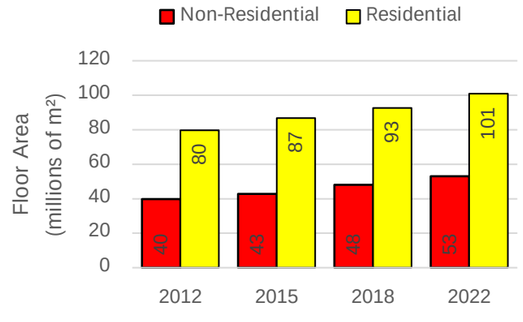
More diversification occurred around development corridors and in nodes. Development in the CBD and surrounding inner city areas has (since 2012) been predominantly residential uses, in what have historically been areas dominated by non-residential land uses.

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.



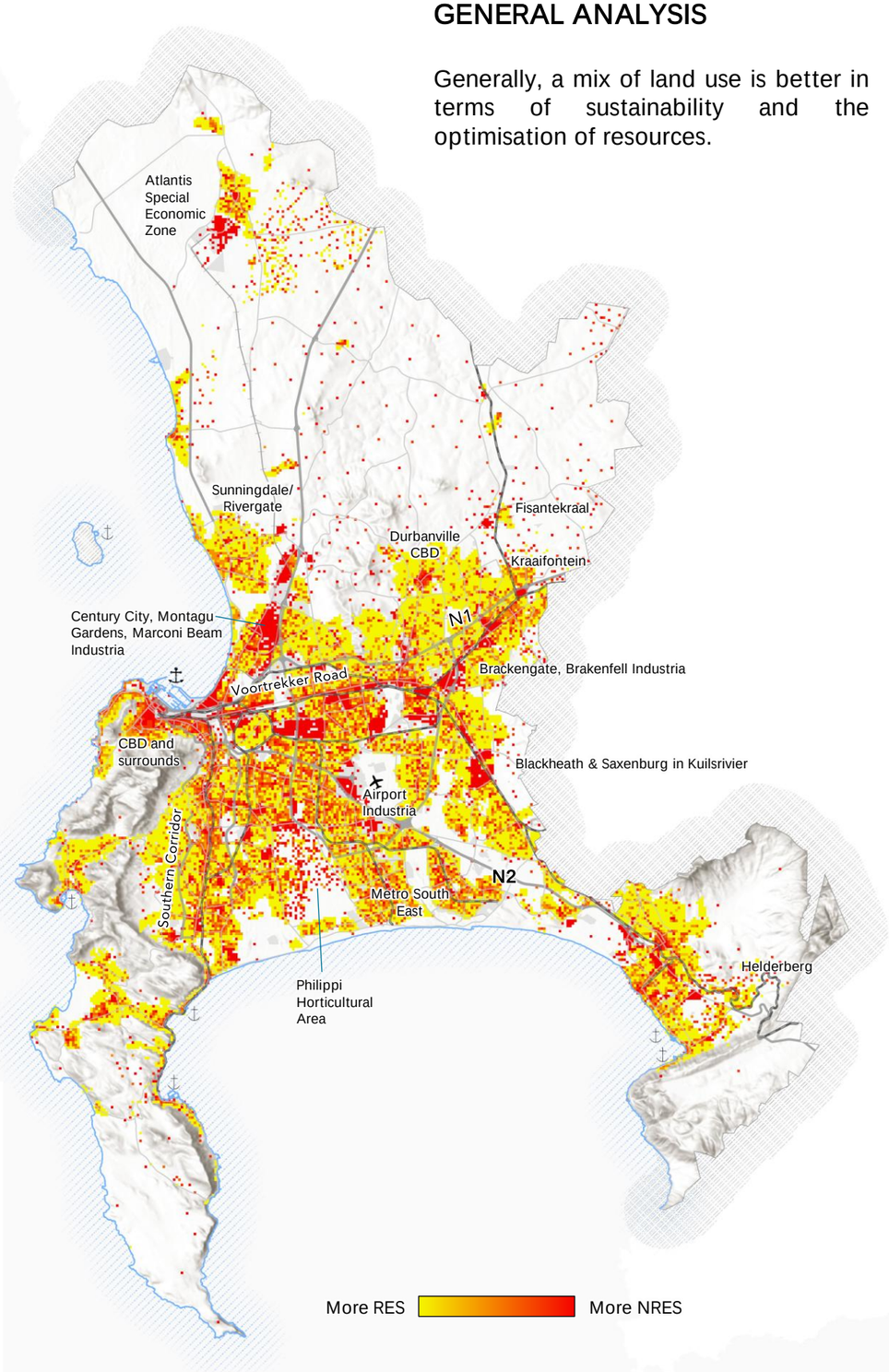
Map C5a-a: Change in land use diversity (2012 to 2022)



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)

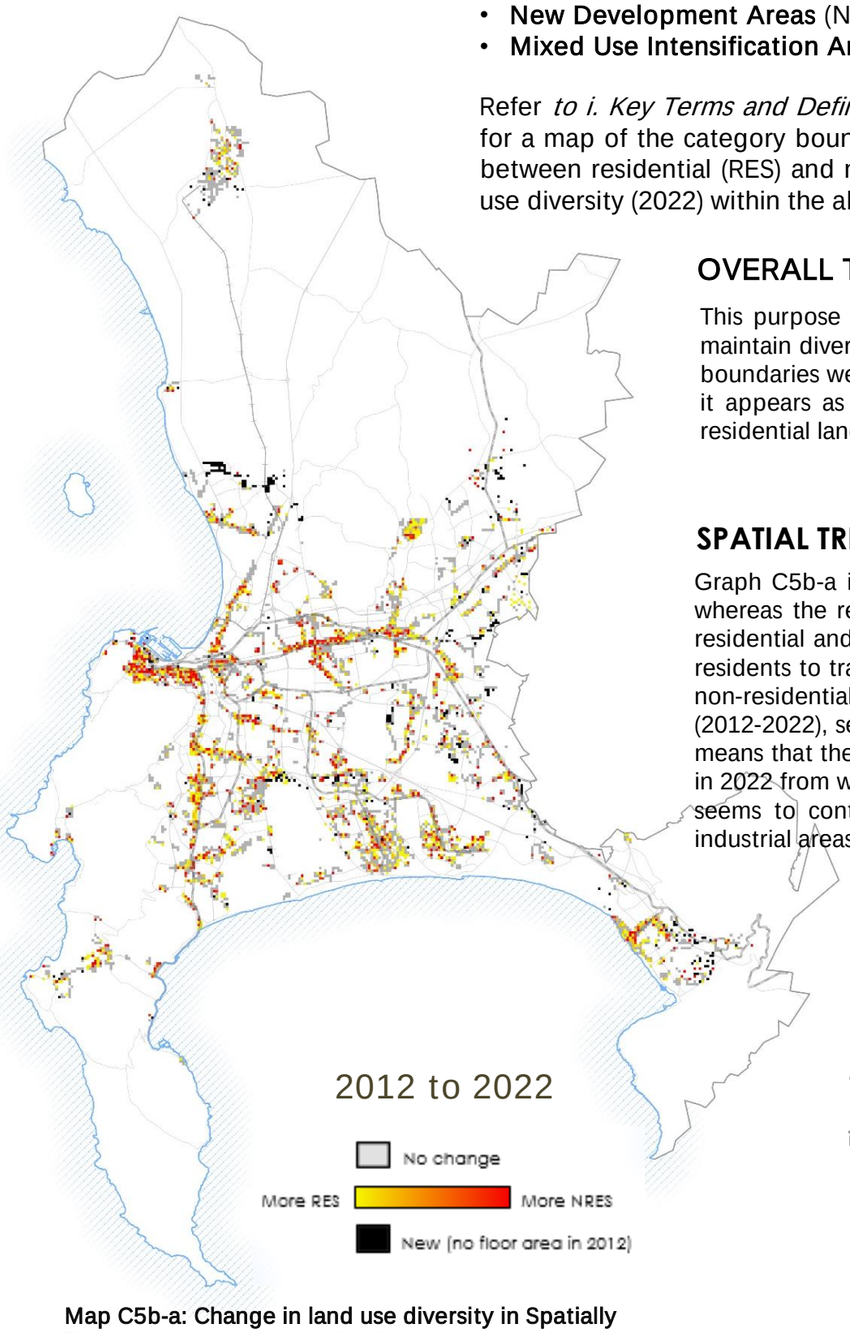
Refer *to i. Key Terms and Definitions* in the report for a description of each and to *indicator C.2b* for a map of the category boundaries. Map C5b-a indicates the change in the ratio (2012 to 2022) between residential (RES) and non-residential (NRES) land uses and Map C5b-b indicates the land use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

OVERALL TREND

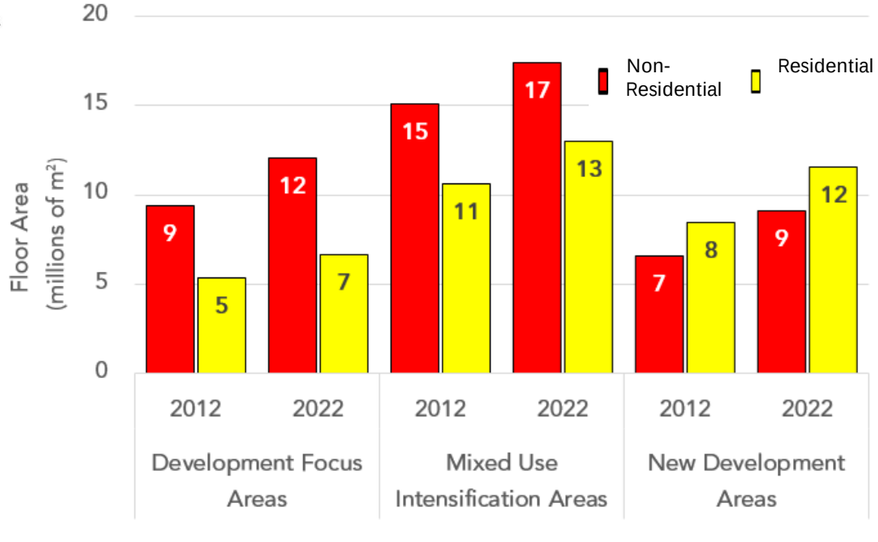
This purpose of this indicator is to determine whether existing policies to establish or maintain diversity of land use in these strategic locations, were effective. Before the STA boundaries were delineated in 2023, there was already diversity of use and from analysis it appears as if there continues 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)

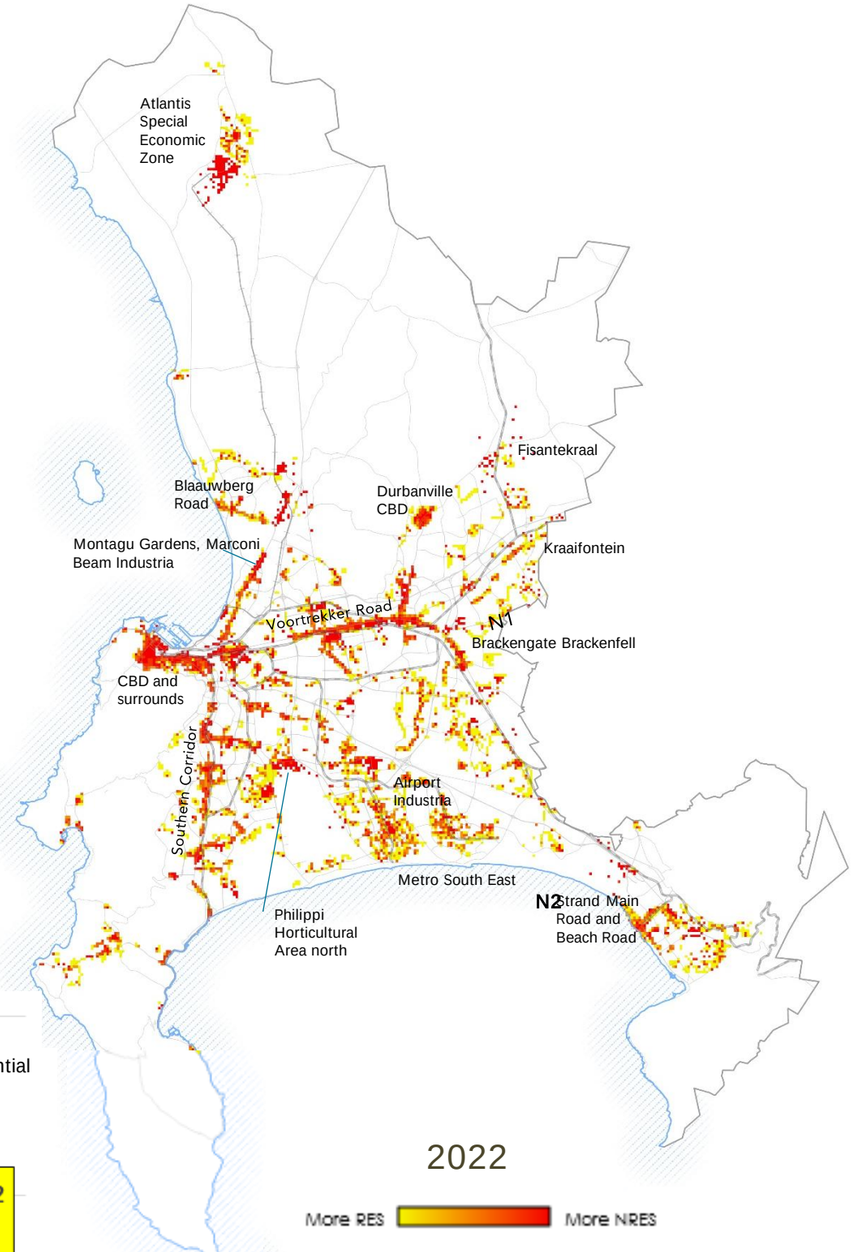
Graph C5b-a indicates that the NDAs have a greater proportion of residential land use whereas the reverse is true in the DFAs and MUIAs. Generally, a mix of land use (equal residential and non-residential) land uses, have the potential to reduce the need for local residents to travel to jobs and services. 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).



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



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



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

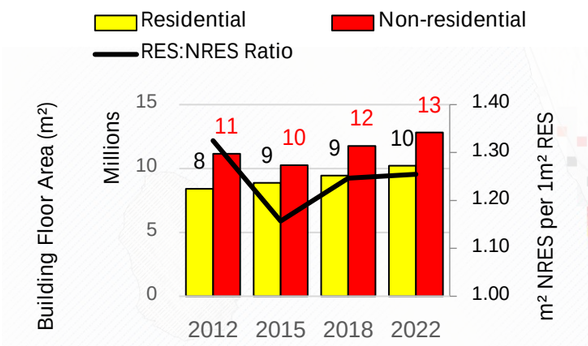
C.5c

LAND AND BUILDING DEVELOPMENT

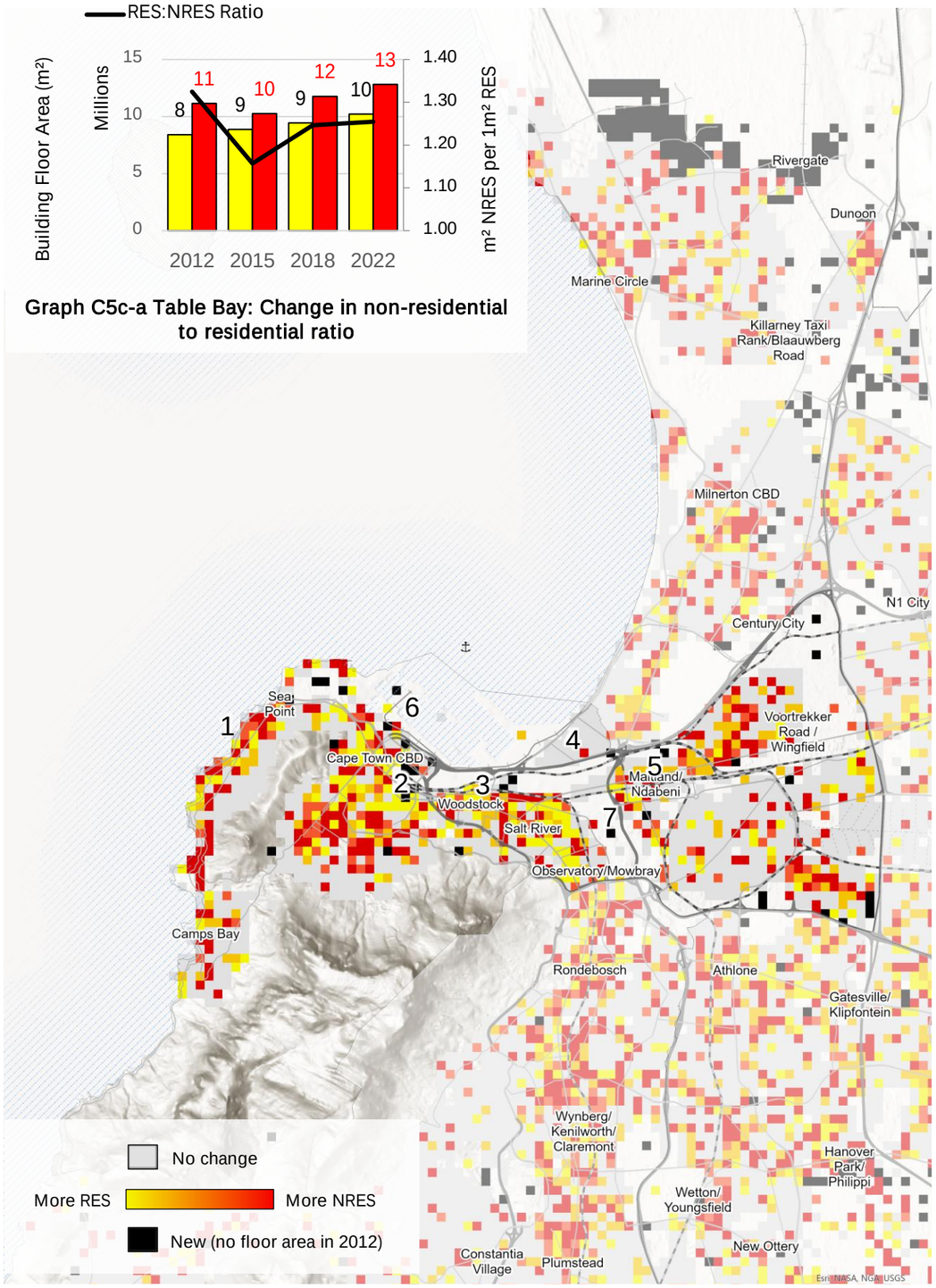
DIVERSITY OF USE (DISTRICT)

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)

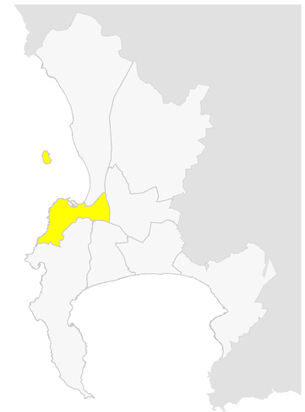
ALIGNMENT TO SPATIAL POLICY

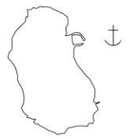
The change in land use between 2012 and 2022 correlates with areas identified for mixed-use intensification. It can be noted that the changes occurred mostly along higher- and lower-order development corridors and nodes where mixed-use intensification is supported.

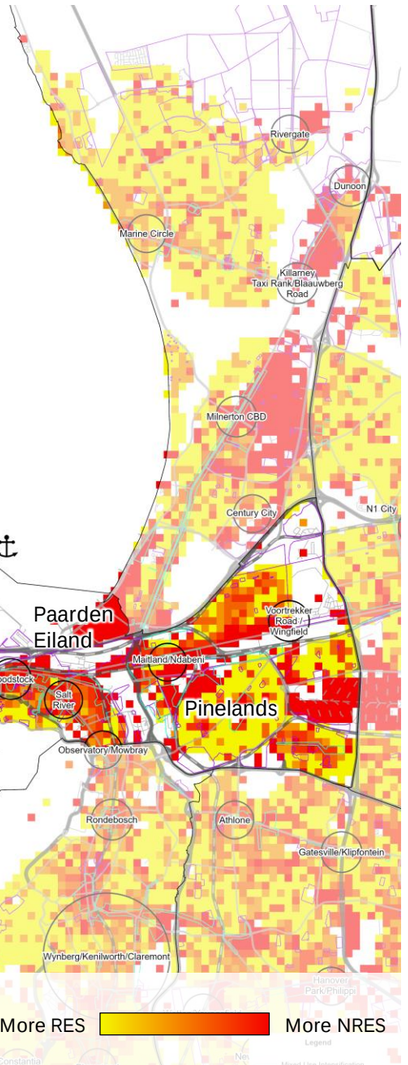
LOCAL LEVEL TRENDS

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)

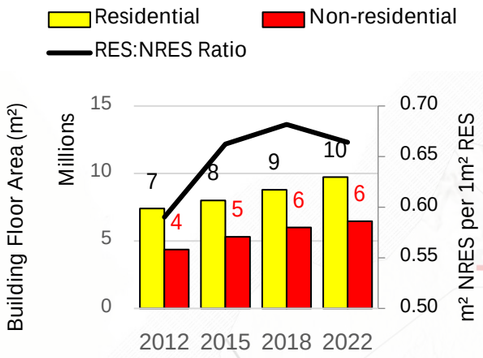
C.5c

LAND AND BUILDING DEVELOPMENT

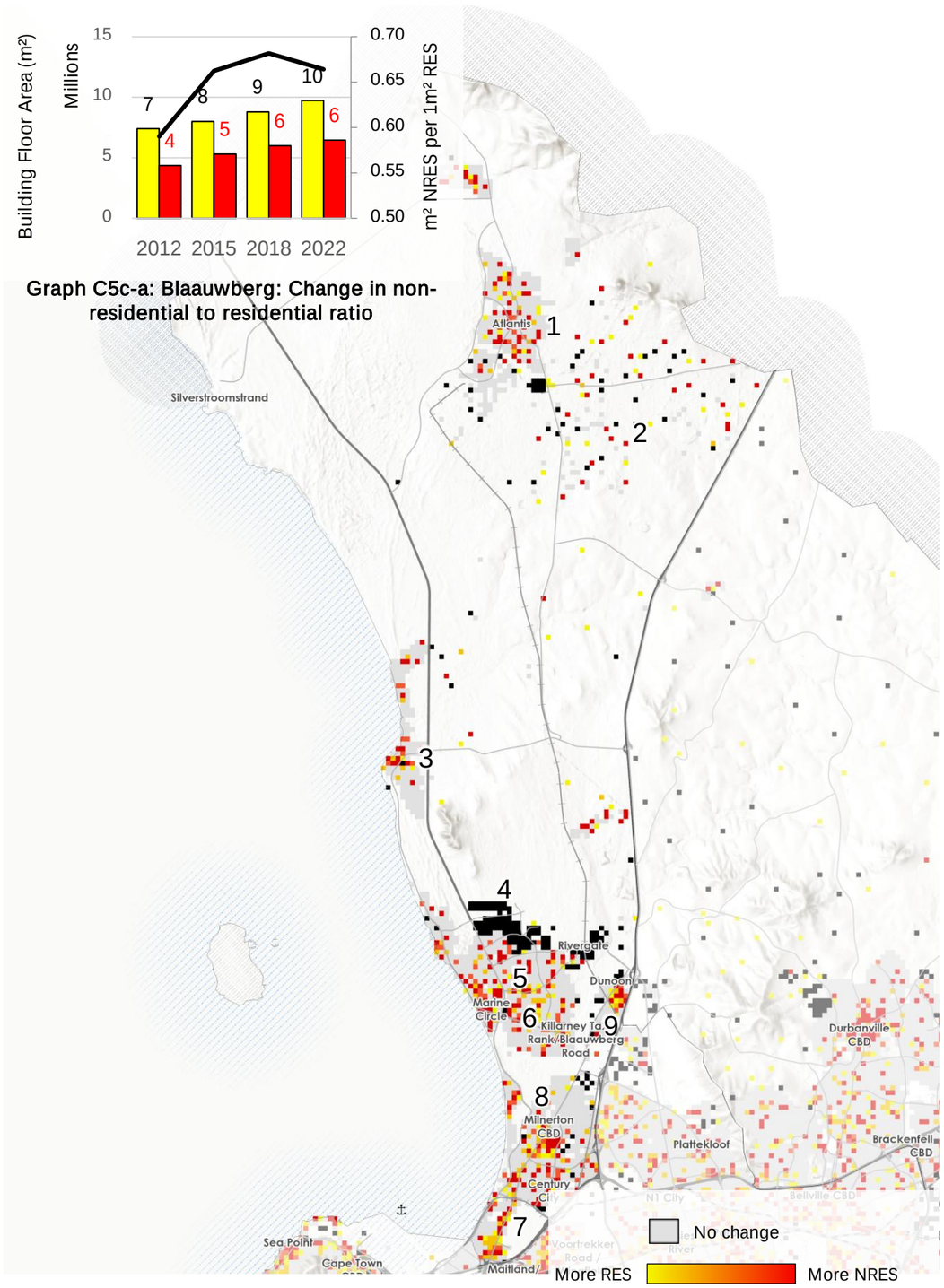
DIVERSITY OF USE (DISTRICT)

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)

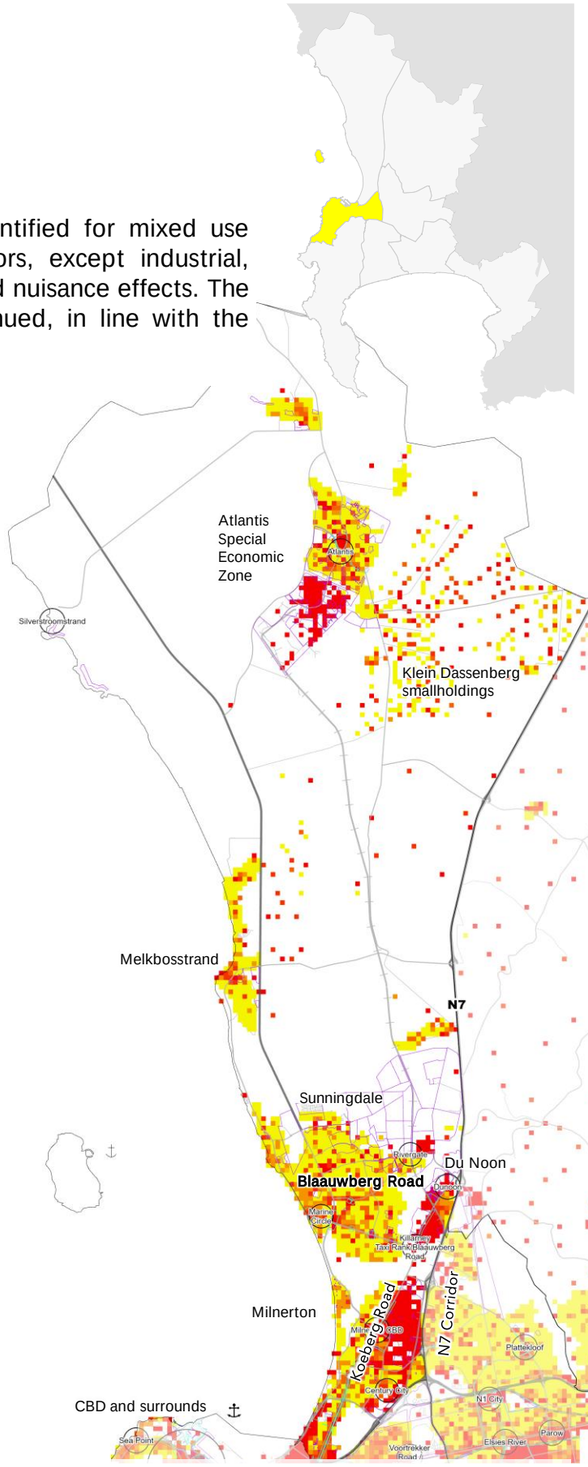
ALIGNMENT TO SPATIAL POLICY

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

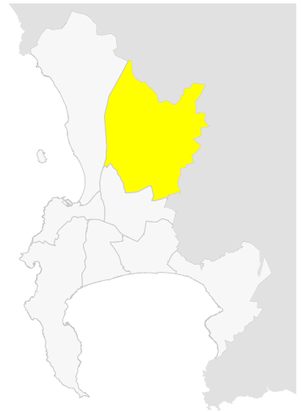
DIVERSITY OF USE (DISTRICT)

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)



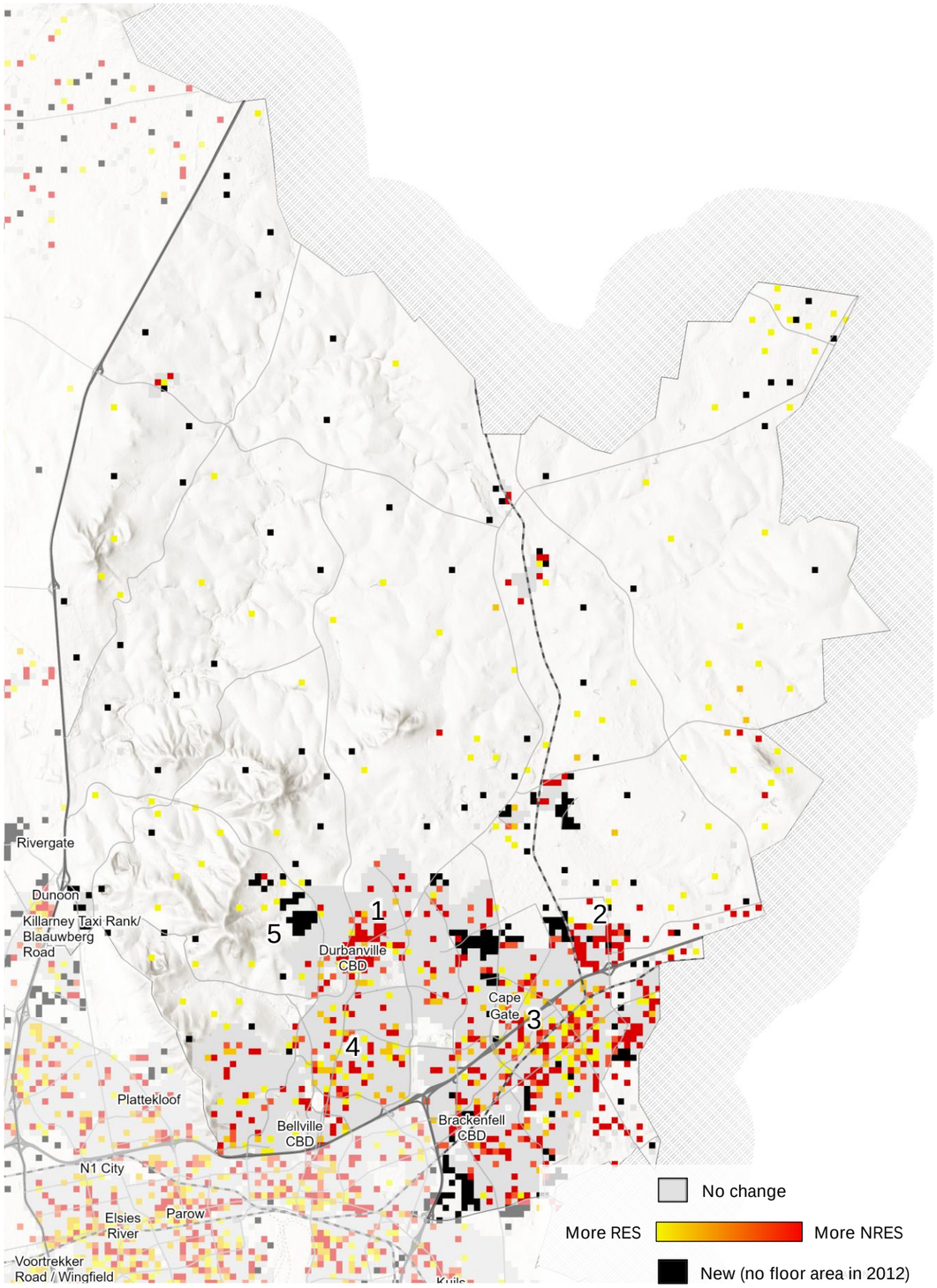
ALIGNMENT TO SPATIAL POLICY

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.

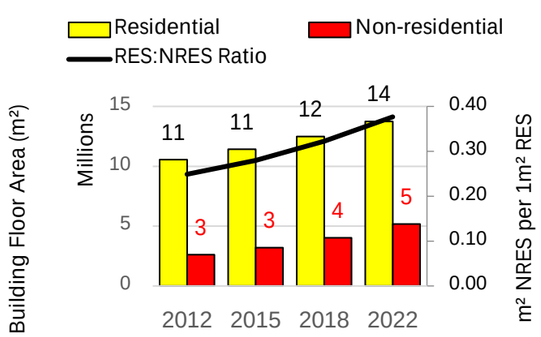
LOCAL LEVEL TRENDS

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

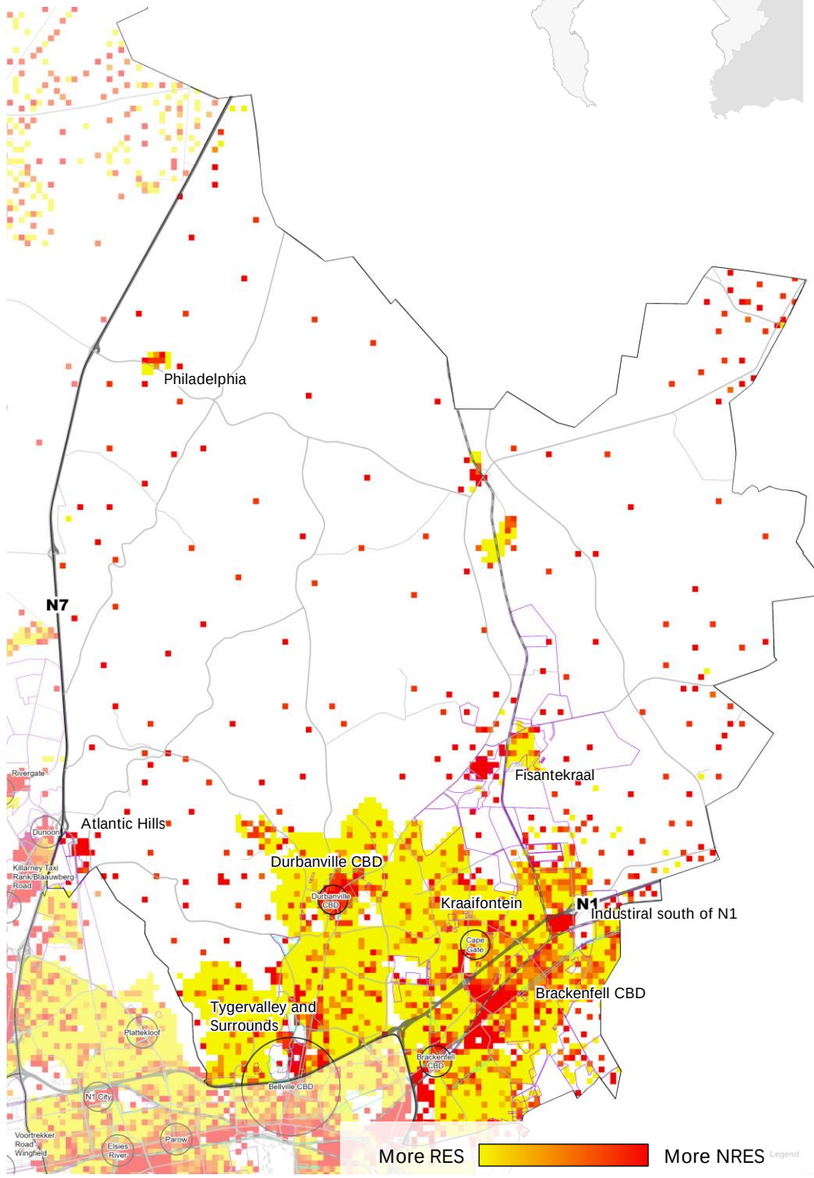
1. Durbanville secondary CBD - Change from SR1 to either GR1- 3 (group housing), and/or commercial at ground level, and higher-density residential (flats) on top, as prescribed in sub-district development guidelines. Implementation since 2012.
2. Joostenbergvlakte smallholdings – Widespread and significant 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)

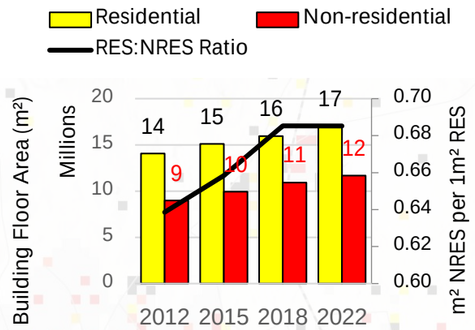
C.5c

LAND AND BUILDING DEVELOPMENT

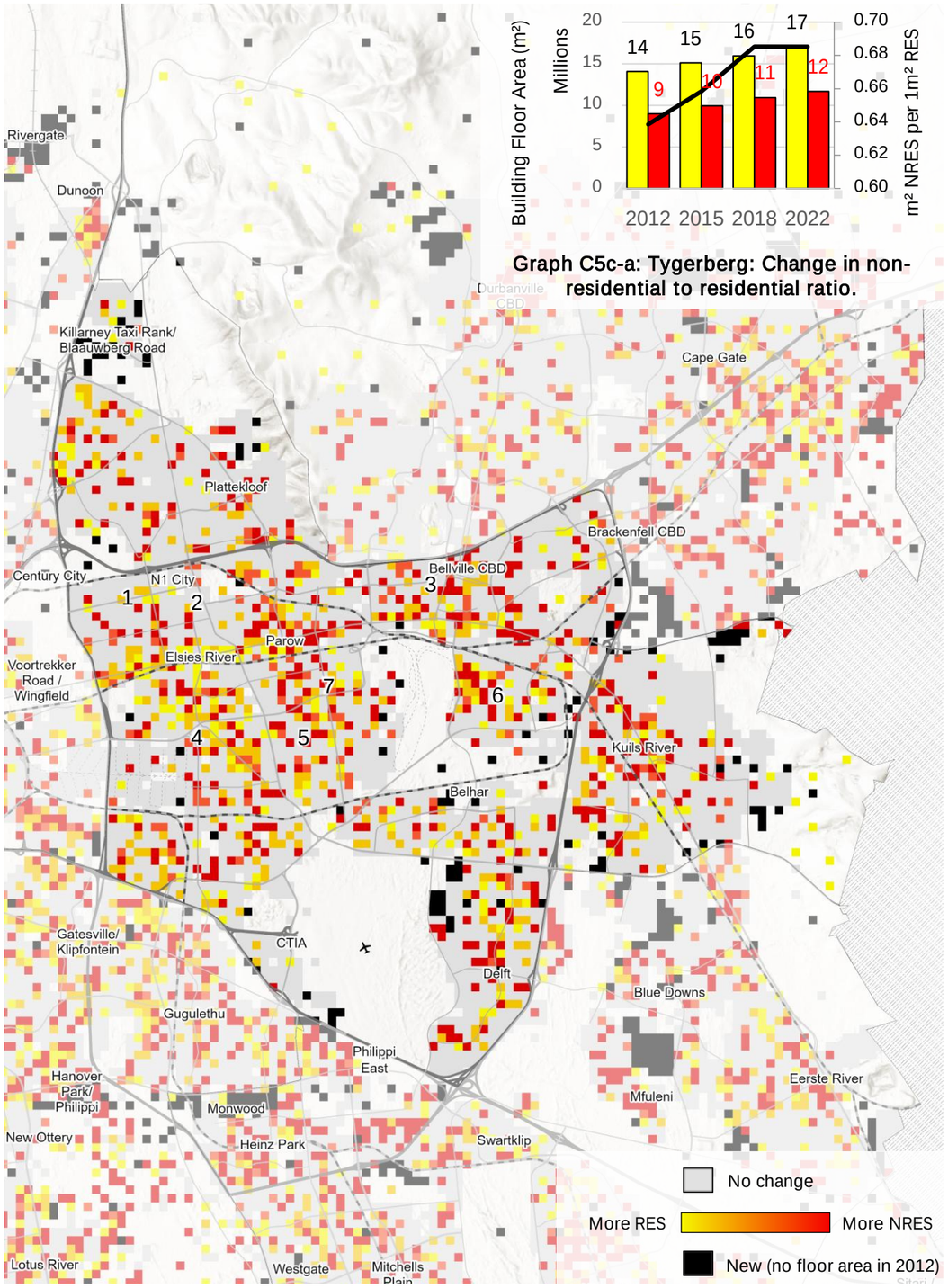
DIVERSITY OF USE (DISTRICT)

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)



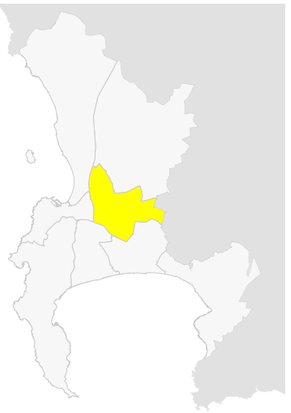
Graph C5c-a: Tygerberg: Change in non-residential to residential ratio.



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

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



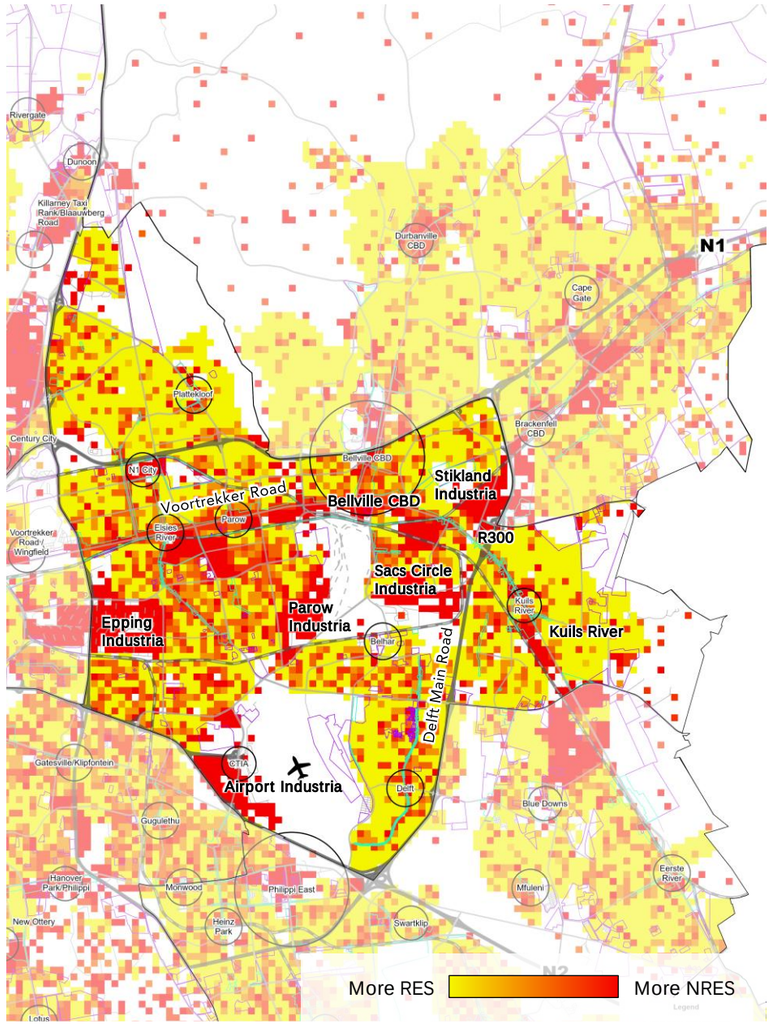
ALIGNMENT TO SPATIAL POLICY

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)

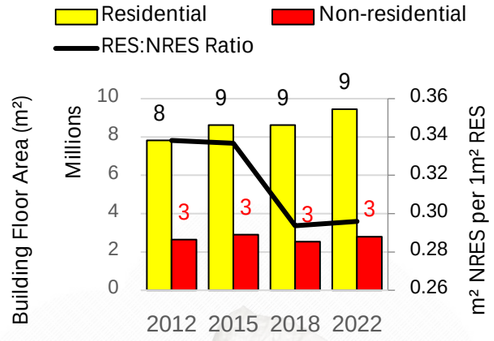
C.5c

LAND AND BUILDING DEVELOPMENT

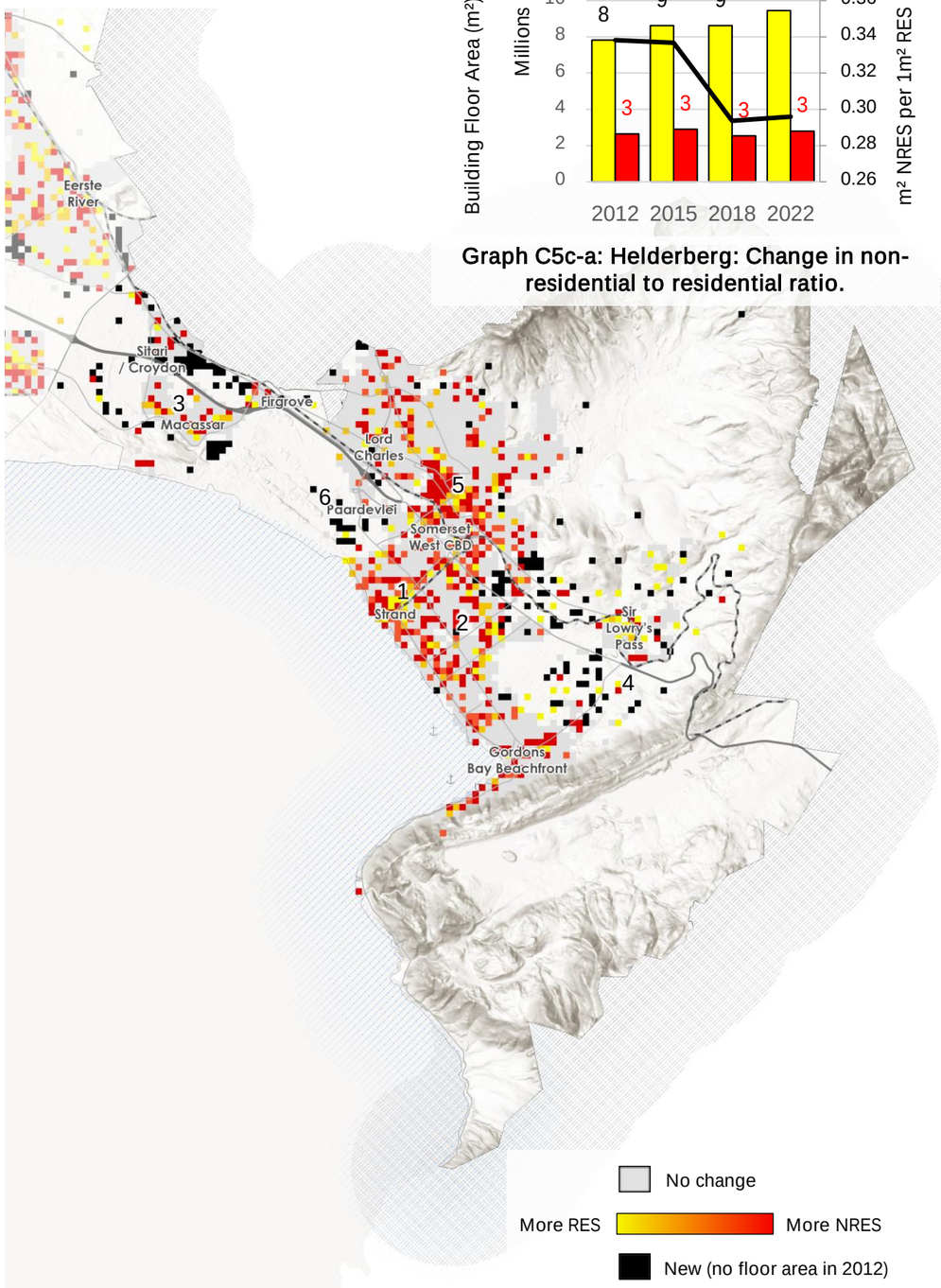
DIVERSITY OF USE (DISTRICT)

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)



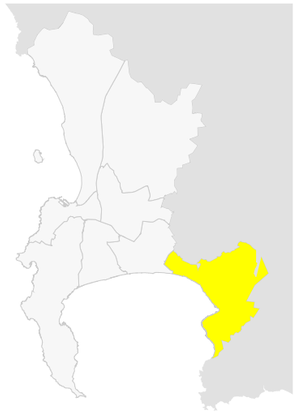
Graph C5c-a: Helderberg: Change in non-residential to residential ratio.



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

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)



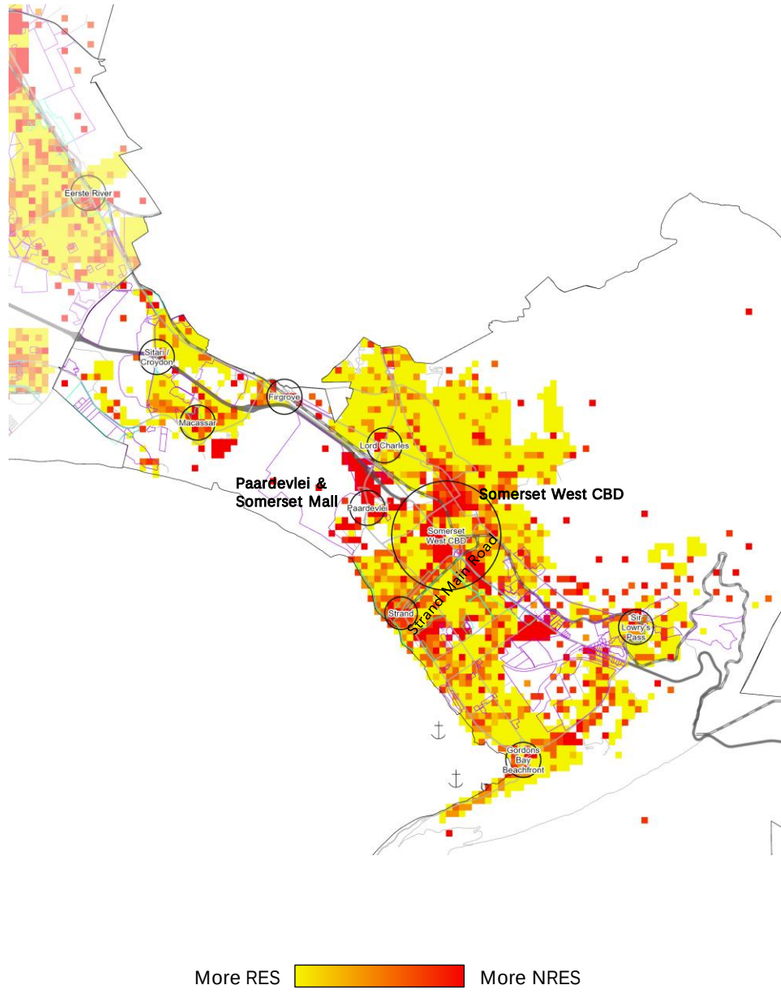
ALIGNMENT TO SPATIAL POLICY

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)

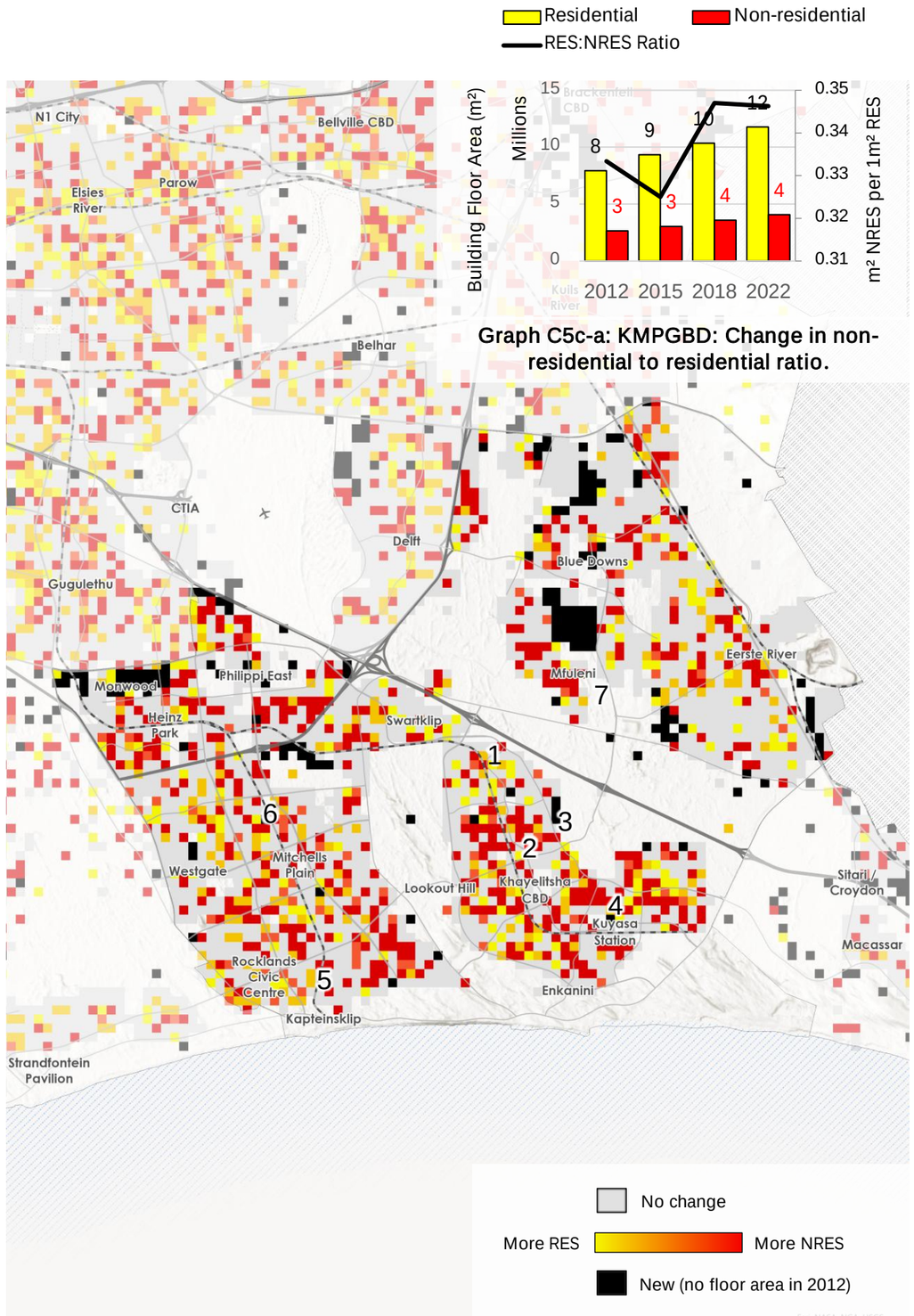
C.5c

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)

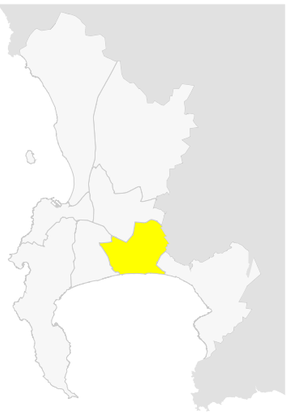


Map C5c-a: KMPGBD: Change in land use diversity (2012 to 2022)

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

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)



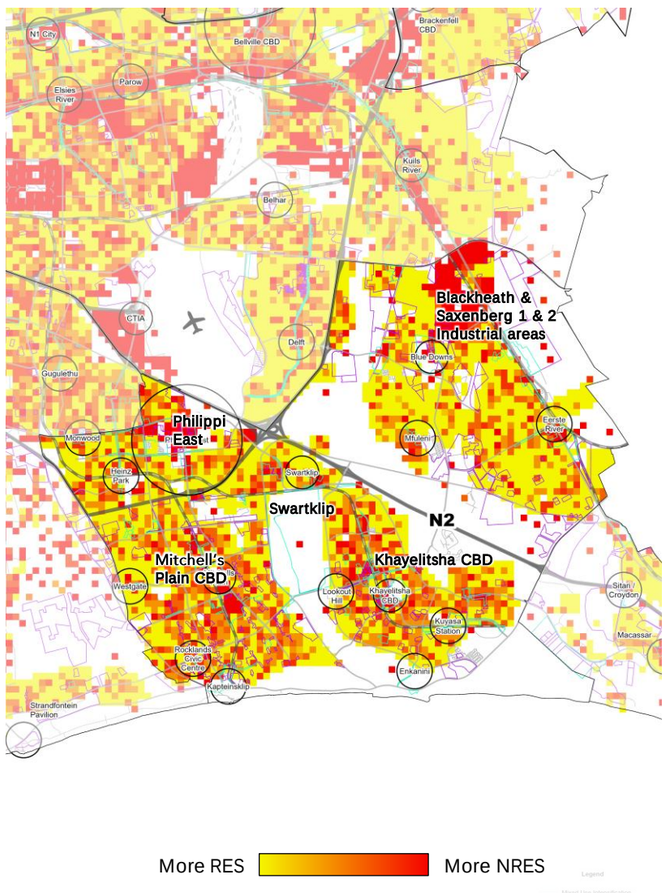
ALIGNMENT TO SPATIAL POLICY

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)

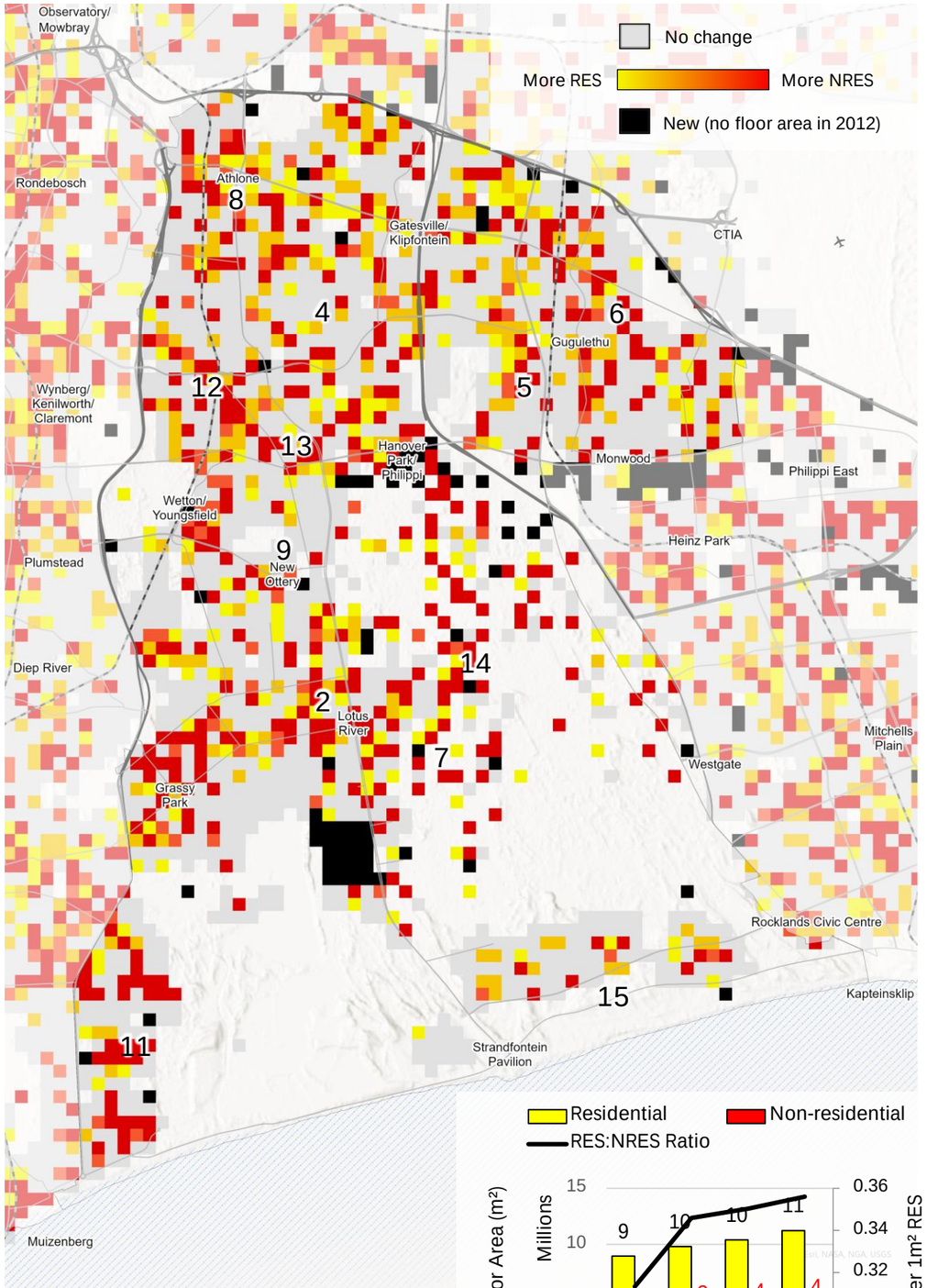
C.5c

LAND AND BUILDING DEVELOPMENT

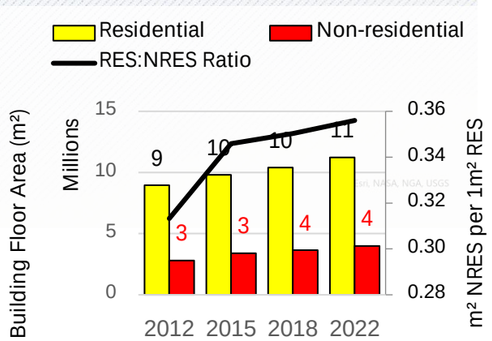
DIVERSITY OF USE (DISTRICT)

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)



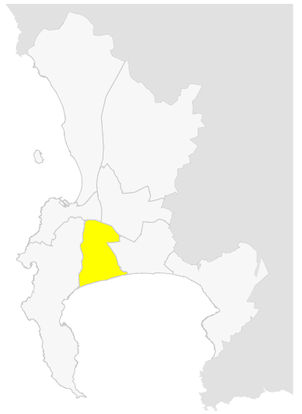
Map C5c-a: Cape Flats: Change in land use diversity (2012 to 2022)



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

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)



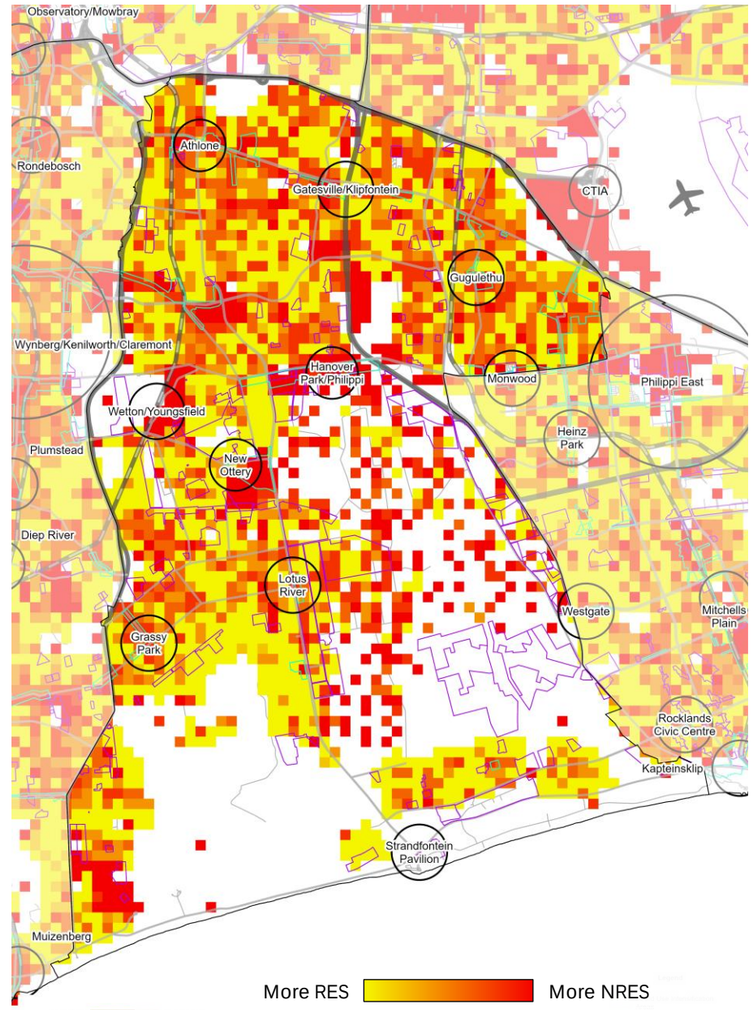
ALIGNMENT TO SPATIAL POLICY

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)

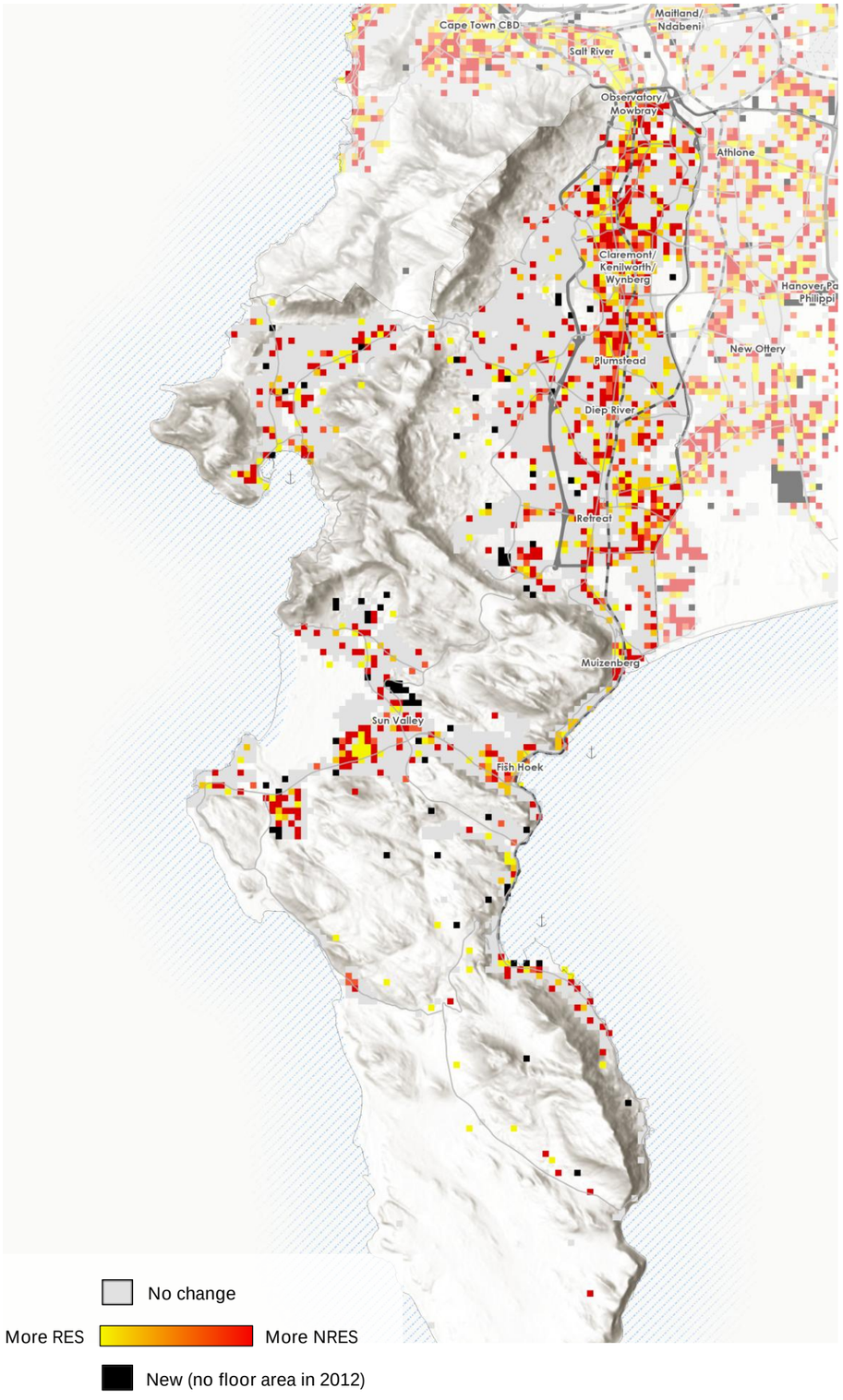
C.5c

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

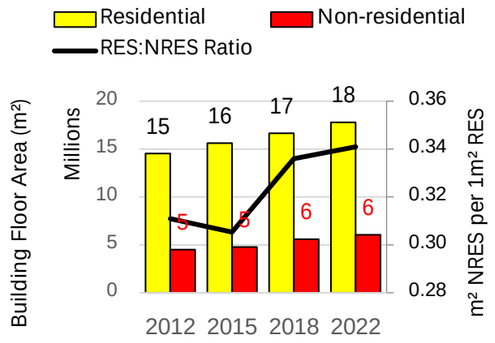
The change in land use between 2012 and 2022 generally correlates with areas identified for mixed-use intensification, mostly along higher- and lower-order development corridors and within urban nodes where mixed-use intensification is supported.

LOCAL LEVEL TRENDS

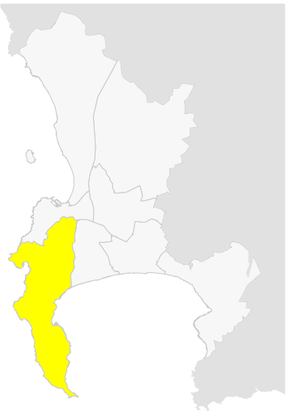
The section below highlights the areas where a significant change in land use was observed. Generally well-balanced diversity is confined to within the Main Road corridor, and new development on vacant land generally limited and confined to peripheral areas of the district.

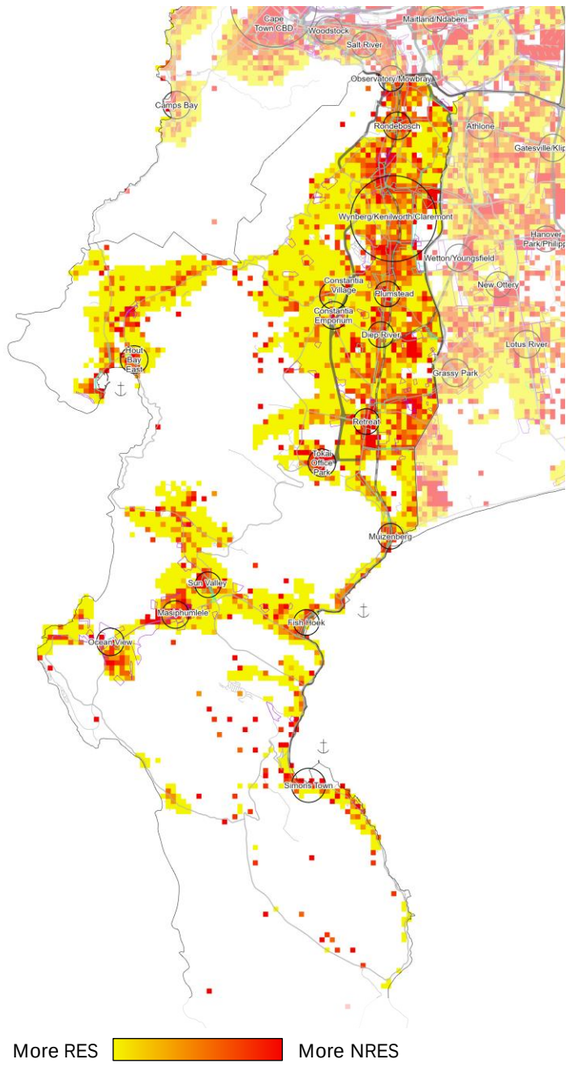
The following provides additional detail:

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

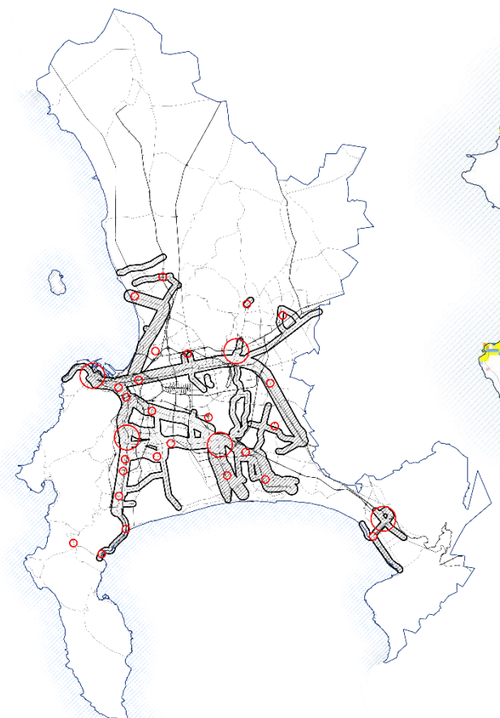
GENERAL ANALYSIS

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).

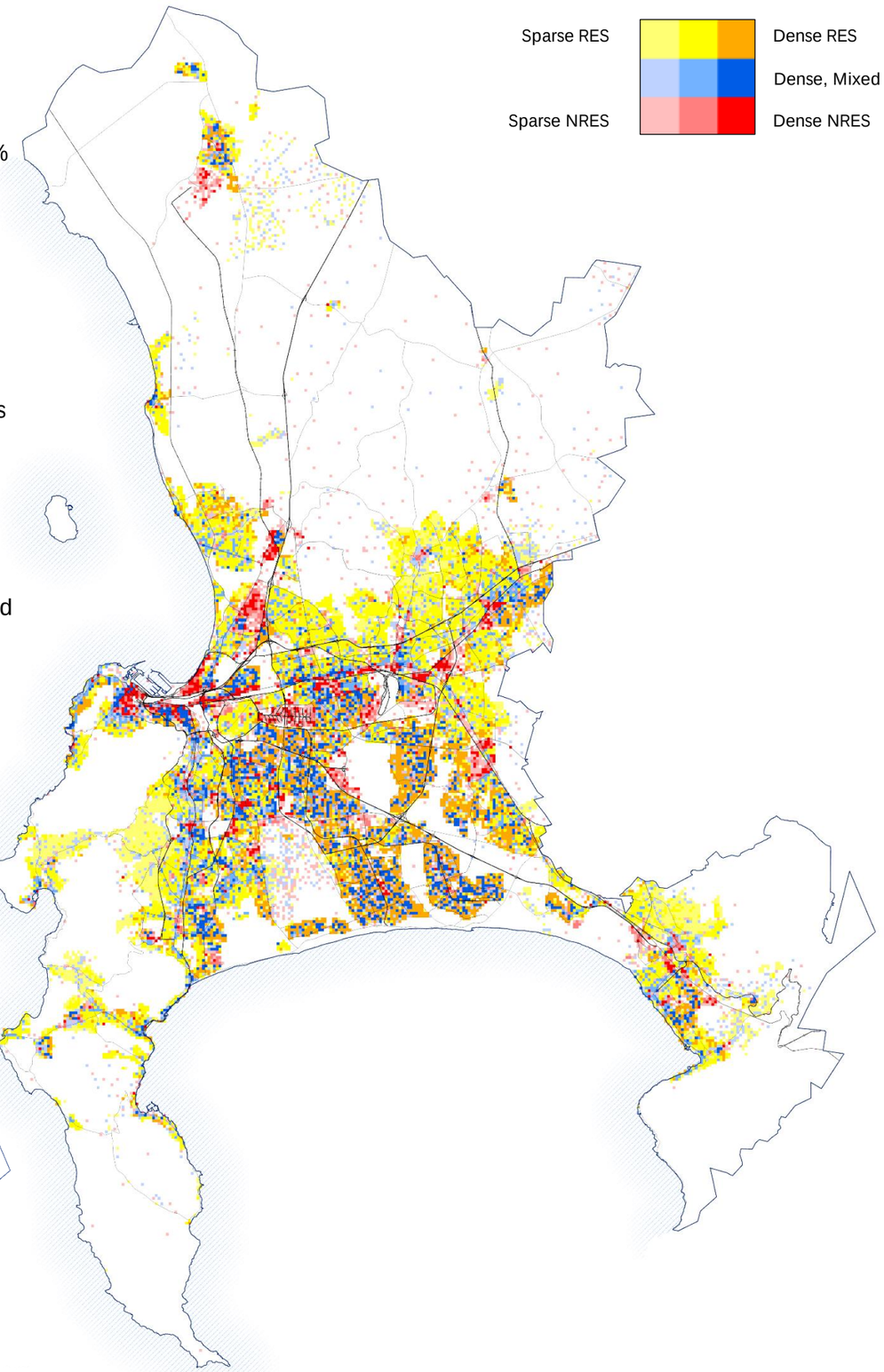
It is evident that strong spatial patterns representing spatial clustering of land use/activities and land use intensity exist.

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 has 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.

C.6a

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL BUILDING PLANS

This indicator shows residential building plans submitted, approved, commenced and completed over time.

Source: DAMS building plan applications 2020-2025

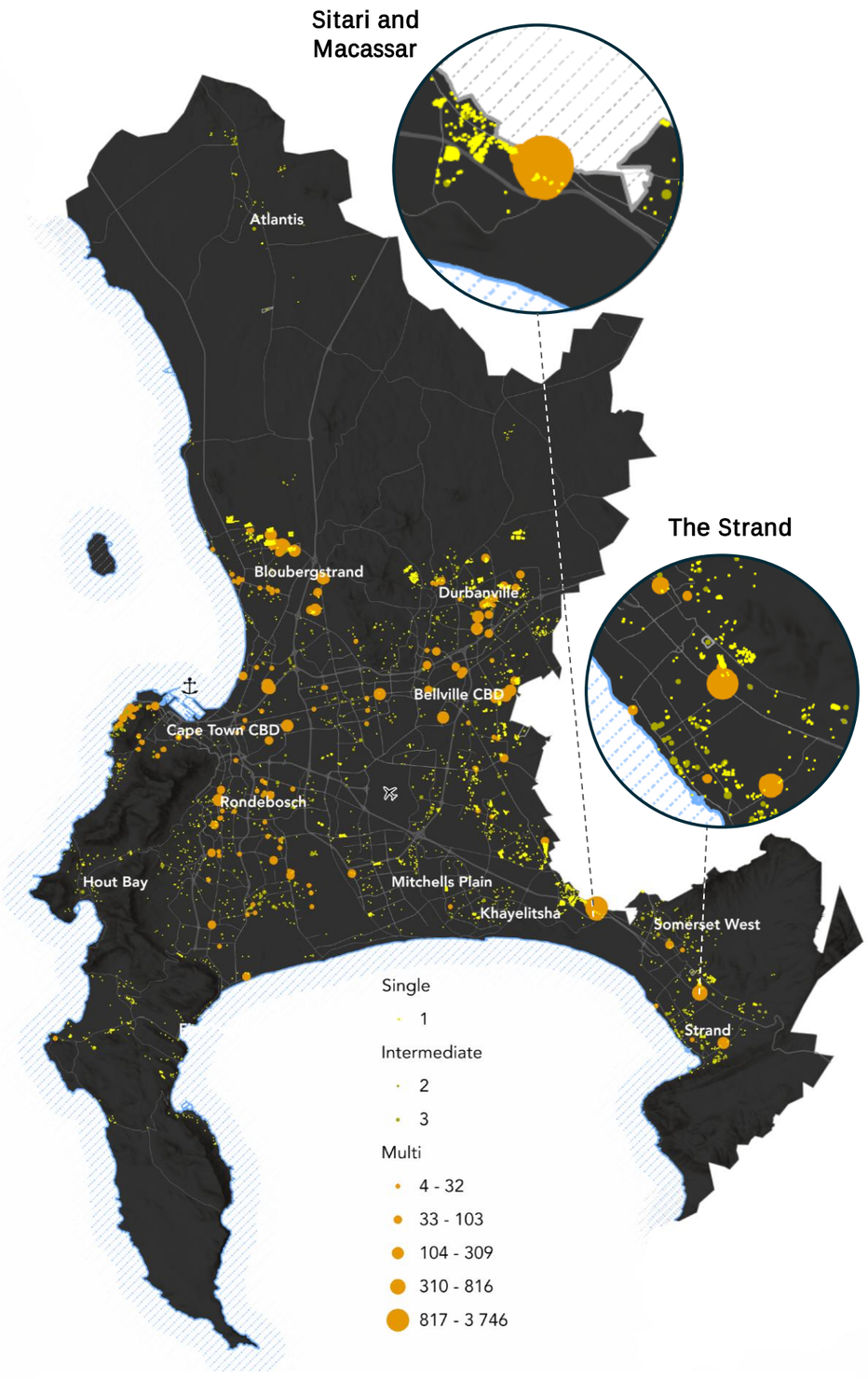


Figure C6-a: Building plans commenced and completed per residential category (single, intermediate and Multi) from January 2020 to April 2025.

OVERWIEW

This indicator measures the total number of residential units from building plans submitted, approved, commenced and completed between January 2020 and April 2025. Figure C6-a spatially depicts both commenced and completed building plans in Cape Town. The size of the circles on the map reflects the total number of residential units. Graph C6-a presents the total number of residential units by category and stage of building plan submission.

Residential units are classified into the following categories:

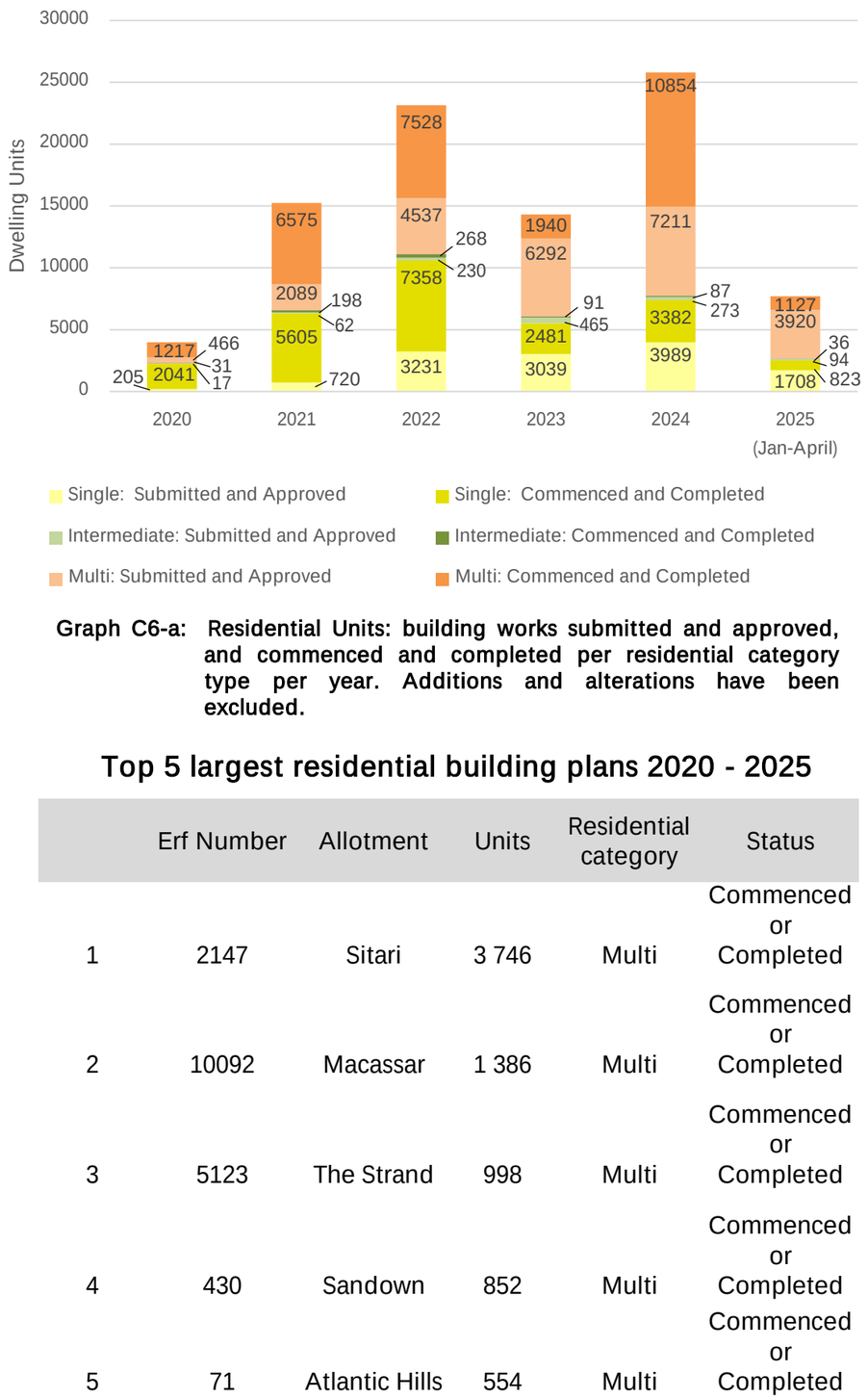
- Single: Building plans for one residential unit
- Intermediate: Building plans for 2 to 3 residential units
- Multi: Building plans for more than 3 residential units

SPATIAL TRENDS

Single residential dwellings were developed city-wide, with higher concentrations towards the urban edge in the northern and eastern parts of the city. Examples of these areas are Bloubergstrand, Sandown, Durbanville, Bellville, Eerste Rivier, Macassar and Strand.

The development of intermediate residential dwellings can also be seen across the city, although they are less common than the single residential and multi-residential categories (4 or more units on a single erf). There are almost none within this category occurring in the far south (Cape Peninsula). Higher concentrations can be seen along the Atlantic Seaboard, Ottery, Grassy Park (Cape Flats), and Strand. Intermediate residential dwellings can indicate the addition of rental units to erven with an existing, main dwelling.

Multi-residential building plan commencements and completions tend to concentrate in development corridors (mainly the Main Road/Southern Corridor, Jan Smuts Drive, Sea Point Main Road, Blaauwberg Road and Sandown Road), and in established nodes within the city such as Bellville, Athlone and Claremont. The largest multi-residential building commencements and completions occurred in areas such as Sitari, Macassar, Strand, Sandown and Atlantic Hills (Table C6-a). These areas fall within the Blaauwberg and Helderberg districts which have a larger availability of vacant land. Development in these areas also coincide with NDAs as designated in the district spatial planning policies.



Graph C6-a: Residential Units: building works submitted and approved, and commenced and completed per residential category type per year. Additions and alterations have been excluded.

Top 5 largest residential building plans 2020 - 2025

	Erf Number	Allotment	Units	Residential category	Status
1	2147	Sitari	3 746	Multi	Commenced or Completed
2	10092	Macassar	1 386	Multi	Commenced or Completed
3	5123	The Strand	998	Multi	Commenced or Completed
4	430	Sandown	852	Multi	Commenced or Completed
5	71	Atlantic Hills	554	Multi	Commenced or Completed
Total			7 536		

Table C6-a: Top 5 largest residential building plans in terms of the number of units from January 2020 to April 2025.

C.6b

LAND AND BUILDING DEVELOPMENT

NON-RESIDENTIAL BUILDINGS PLANS: COMMERCIAL

This indicator shows commercial building plans submitted, approved, commenced and completed over time.

Source: DAMS building plan applications 2020-2025

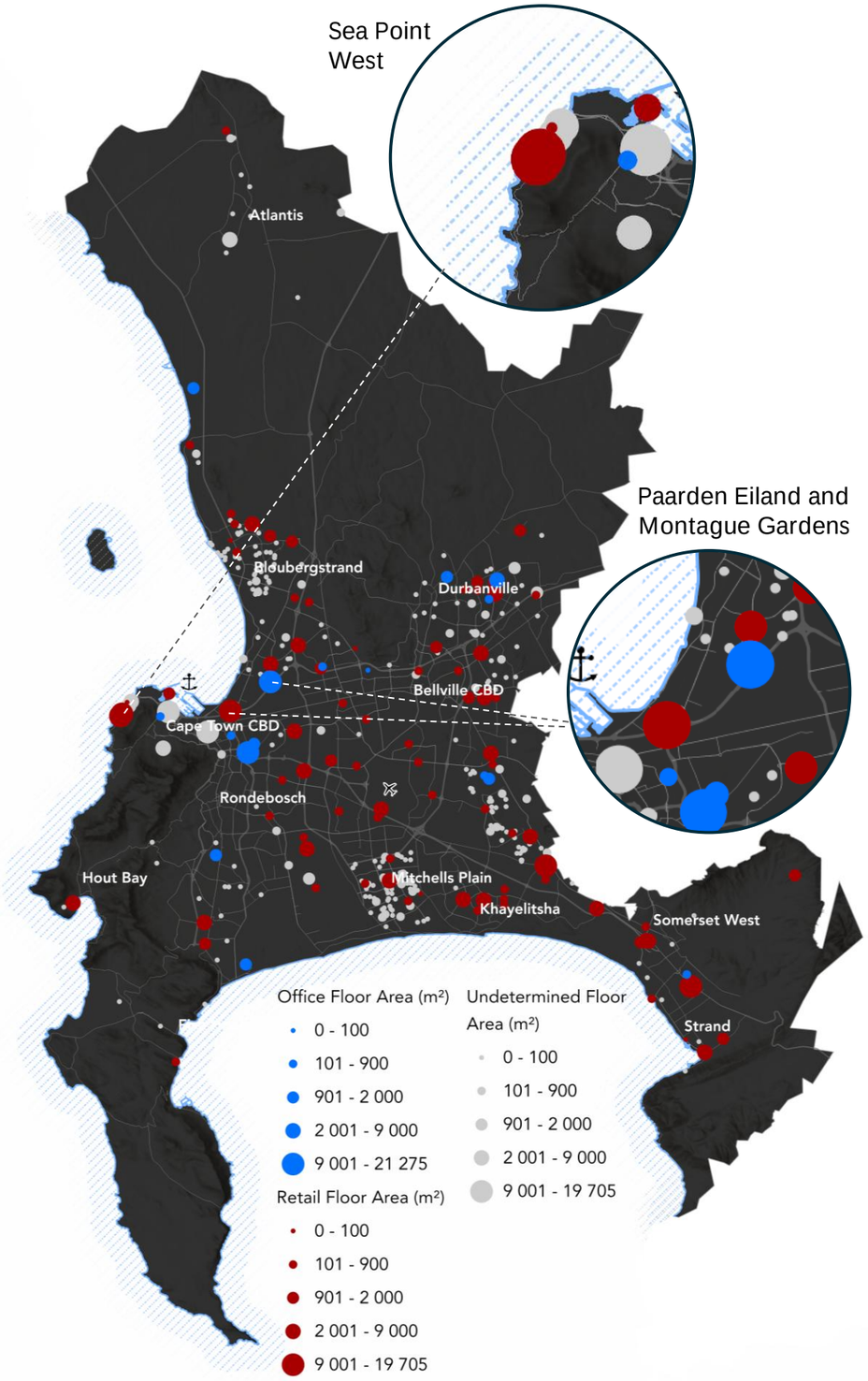


Figure C6-b: Building plans commenced and completed per commercial category (retail and office) from January 2020 to April 2025. Additions and alteration have been excluded

OVERVIEW

This indicator measures the total commercial (office and retail) floor area from building plans submitted, approved, commenced and completed between January 2020 and April 2025. Figure C6-b spatially depicts both commenced and completed building plans in Cape Town. The size of the circles on the map reflects the total commercial floor area. Graph C6-b presents the total commercial floor area by category and stage of building plan submission.

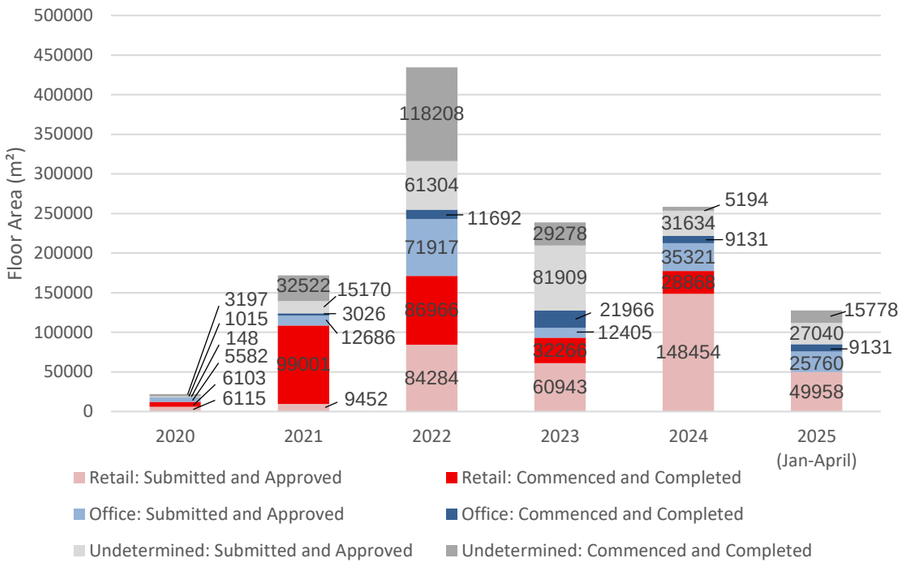
Commercial floor area is classified into the following categories:

- Retail: Businesses selling goods or services directly to consumers.
- Office: Buildings with rooms used for commercial or professional work.
- Undetermined: Non-residential building plans, excluding parking, where the category could not be determined.

SPATIAL TRENDS

The retail building plans are dispersed across the City. Areas of larger retail floor area tend to occur along or in close proximity to higher order mobility routes such as Jakes Gerwel Drive (M7), N1, N2 and Van Riebeeck Road. The largest retail developments occurred in Paarden Eiland, Sea Point and Eerste River. Other notable areas of retail growth is at the outer lying areas to the north and east such as Parklands, Bellville and Strand. This coincides with the growing residential densities that are extending outwards as indicated by the residential building plans and NDAs. The Metro South East (Mitchells Plain and Khayelitsha) has also seen some retail growth, thereby potentially indicating a growing economy in the more vulnerable areas.

Office building plans that have commenced or been completed are significantly lower than that of retail building plans. This trend is likely influenced by the rise of remote working and the increasing popularity of shared office spaces. The largest building plan is located in Century City (Montague Gardens allotment). The new Amazon development in Observatory has also added a significant office floor space to the City. Durbanville exhibits an agglomeration of office space while smaller pockets occur in a decentralised fashion in areas such as Wynberg, Muizenberg, Strand, Blackheath and Duynefontein.



Graph C6-b: Commercial building plans submitted and approved, and commenced and completed per commercial category type (retail and office) per year. Additions and alterations have been excluded.

Top 5 largest commercial building plans 2020 - 2025

	Erf Number	Allotment	Floor Area (m²)	Category	Status
1	7209	Montague Gardens	21 275	Office	Commenced or Completed
2	110219	Cape Town (Paarden Eiland)	19 705	Retail	Commenced or Completed
3	1247	Sea Point West	176 94	Retail	Commenced or Completed
4	1249	Sea Point West	12 364	Retail	Commenced or Completed
5	5541	Eerste River	11 676	Retail	Commenced or Completed
Total			82 714		

Table C6-b: Top 5 commercial building plans in terms of floor area that have been commenced or completed from January 2020 to April 2025.

C.6c

LAND AND BUILDING DEVELOPMENT

NON-RESIDENTIAL BUILDING PLANS: INDUSTRIAL

This indicator shows industrial building plans commenced and completed over time.

Source: DAMS building plan applications 2020-2025

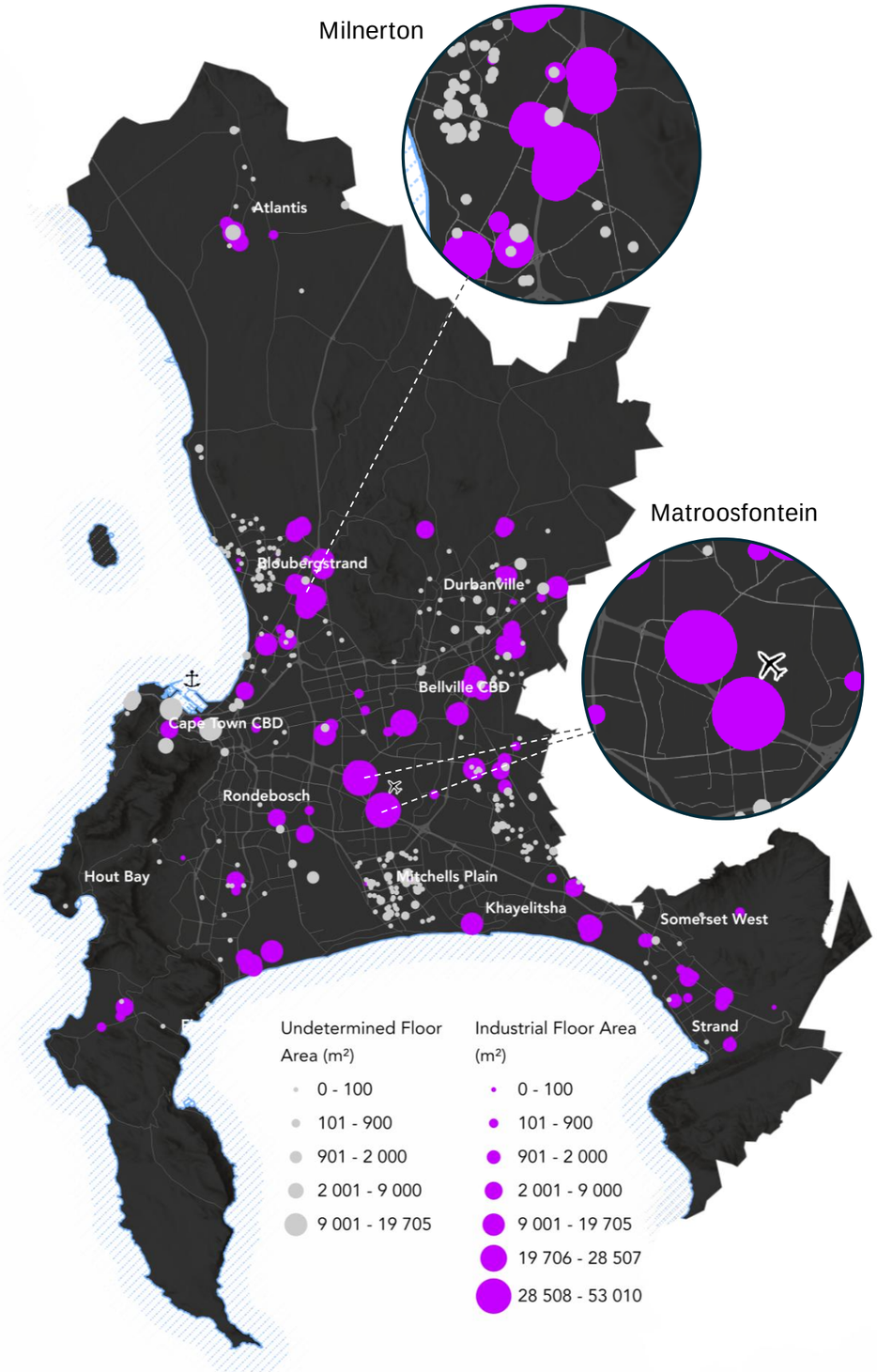


Figure C6-c: Building plans commenced and completed for industrial building plans from 2020 to 2025 (Jan – April). Additions and alteration have been excluded.

OVERVIEW

This indicator measures the total industrial floor area from building plans submitted, approved, commenced and completed between January 2020 and April 2025. Figure C6-c spatially depicts both commenced and completed building plans in Cape Town. The size of the circles on the map reflects the total industrial floor area. Graph C6-c presents the total industrial floor area by category and stage of building plan submission.

Industrial floor area is classified into the following categories:

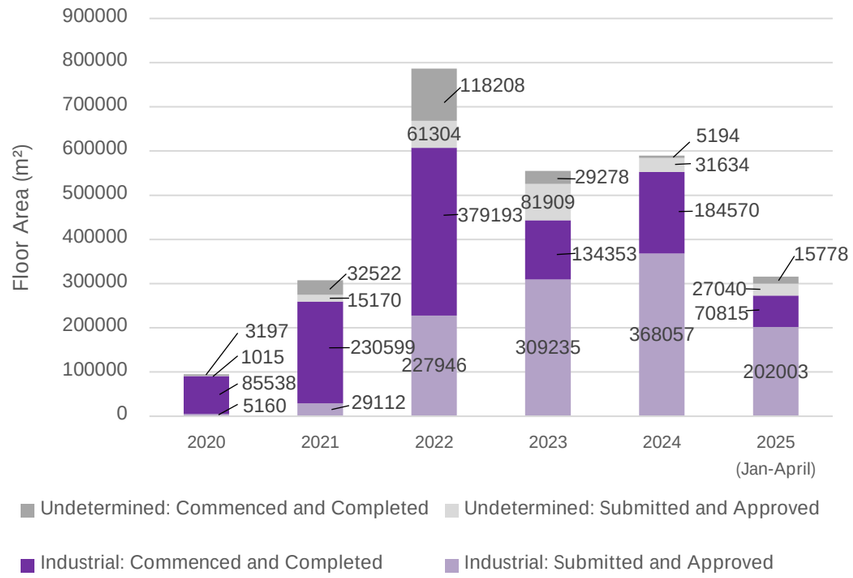
- Industrial: Land uses involving manufacturing, logistics or large-scale warehousing.
- Undetermined: Non-residential building plans, excluding parking, where the category could not be determined.

SPATIAL TRENDS

The top two largest building plans are both located in Matroosfontein, in close proximity to Cape Town International Airport. Other areas such as Richmond Park (Milnerton) and Parow Industria (Parow) also saw a significant increase in floor area with a large agglomeration of building plans having commenced or having been completed. This is a result of large, greenfield sites adjacent to existing industrial areas being taken up by industry related predominantly to logistics and warehousing. These land uses are likely a result of the growth in e-commerce and need for distribution centres and warehousing. Smaller agglomerations can be seen in Brackenfell, Kraaifontein, Strand, Muizenberg and Atlantis.

While the general trend seems to be that industry is growing in and around existing industrial areas or business parks, a small industrial area has begun to form just north-east of the intersection of Okavango road and Stonewood Drive on the outskirts of a residential neighbourhood. Some small, outer lying pockets of industrial land occur on farms and likely relate to the harvesting, processing and/or storage of produce.

The Metro South East has seen very little industrial growth. In Khayelitsha, the main increase in floor area is attributed to the development of a bus depot. Greater industrial investment in this area would be a benefit for local economic growth for job seekers in the skilled and semi-skilled range.



Graph C6-c: Industrial floor area of building works submitted and approved, and commenced and completed per year. Additions and alterations have been excluded.

Top 5 largest industrial building plans 2020- 2025

	Erf Number	Allotment	Floor Area (m²)	Category	Status
1	180439	Cape Town (Matroosfontein)	53 010	Industrial	Commenced or Completed
2	113223	Cape Town (Matroosfontein)	45 105	Industrial	Commenced or Completed
3	37145	Milnerton	28 507	Industrial	Commenced or Completed
4	38394-RE	Milnerton	24 768	Industrial	Commenced or Completed
5	22937	Parow	24 639	Industrial	Commenced or Completed
Total			176 029		

Table C6-c: Top 5 industrial building plans in terms of the largest floor area from January 2020 – April 2025.

LAND AND BUILDING DEVELOPMENT

KEY TAKE-AWAY TRENDS

- **The majority of residential development, particularly large developments such as apartment blocks, are occurring on the outer lying areas of the City** which coincides with large, affordable tracts of land and NDAs as designated in the district spatial planning policies.

- **A significant increase in retail floor area is also evident in outer-lying regions.** This is likely driven by rising demand for retail services to support the growing residential densities in these areas, as previously highlighted in Section C.6a.

- **Low building plan commencements and completions for offices suggest a continued contraction of the office sector** following 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 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 submitted over the past several years.

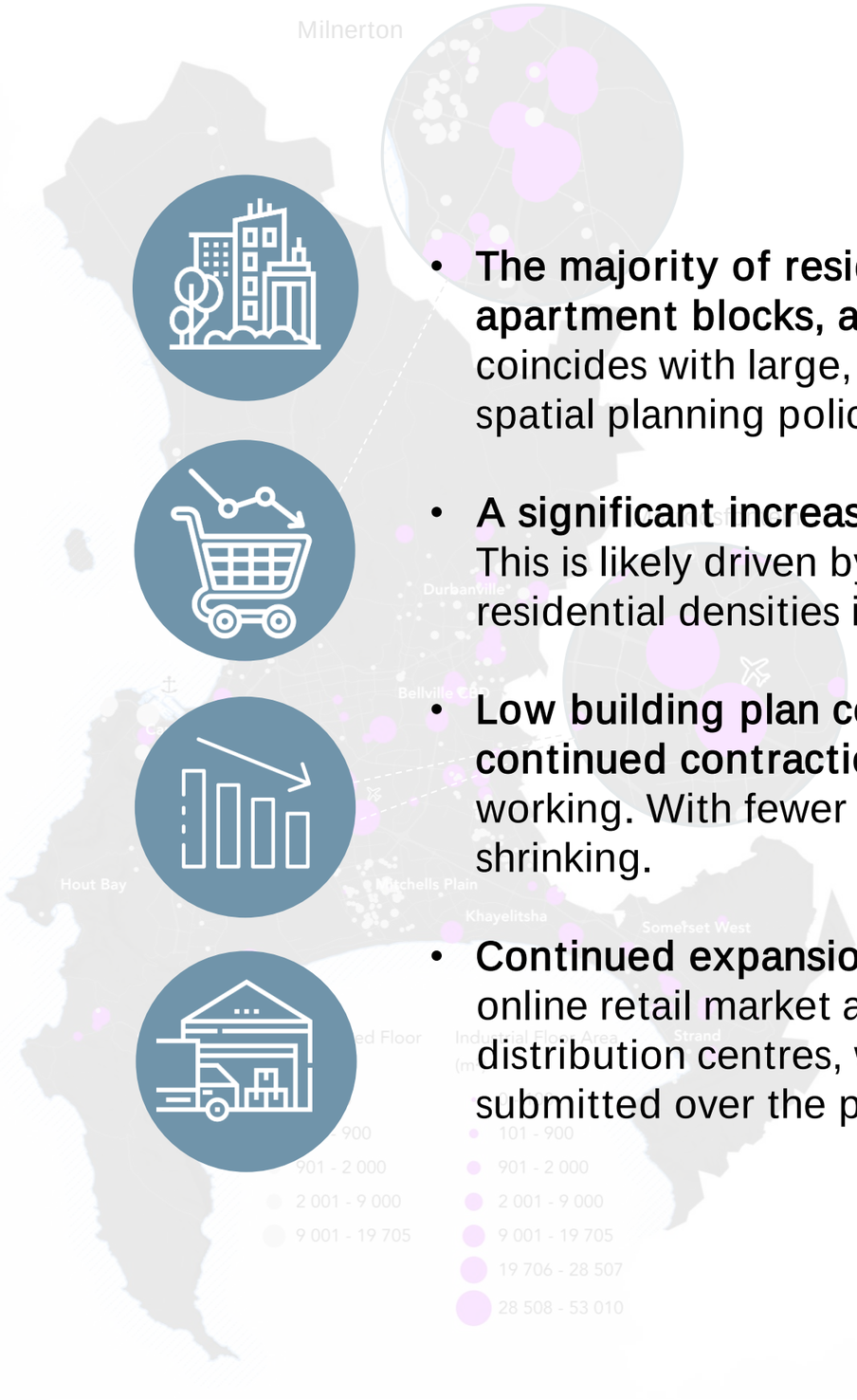


Figure C6-c: Building plans commenced and completed for industrial building plans from 2020 to 2025 (Jan – April). Additions and alteration have been excluded.

GENERAL ANALYSIS

In terms of the Industrial building plans that have commenced or have been completed, the spatial data indicates a large increase in industrial floor space from 2020 to 2025. The top two largest building plans are both located in Matroosfontein, in close proximity to [illegible] as Richmond Park (Milnerton) and Brackengate (Parow) [illegible] agglomeration of building plans having commenced or [illegible] complexes. This is a result of large greenfield sites adjacent to existing industrial areas being taken up by industry related predominantly to logistics and warehousing. These land uses a likely a result of the rise of online shopping and deliveries after the COVID-19 pandemic. Smaller developments are also [illegible] Brackenfell, Kraaifontein, Ottery, Maitland and Atlantis.

While the general trend seems to be that industry is growing in and around existing industrial areas or [illegible] just north-east of the intersection of Okavango road and [illegible] neighbourhood. Some small outer lying pockets of [illegible] harvesting, processing and/or storage of produce.

The Metro South East has seen very little industrial growth. In Khayelitsha, the main increase in floor area is [illegible] local economic growth for job seekers in the skilled and

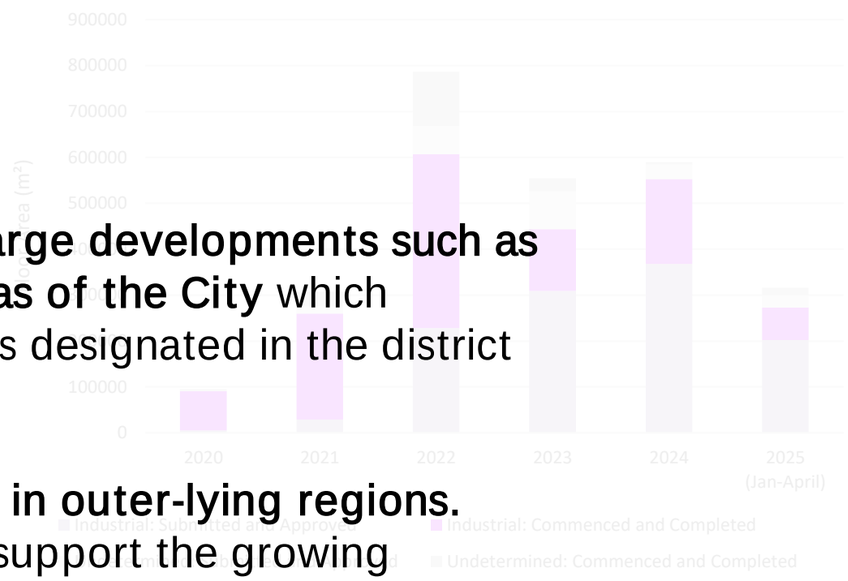


Figure C6-d: Total floor area of building works submitted and approved, and commenced and completed per residential category type per year. This excludes additions and alterations.

Top 5 largest industrial building plans 2020- 2025

	Erf Number	Allotment	Floor Area (m²)	Category	Status
1	180439	(Matroosfontein)	53010	Industrial	Commenced or Completed
2	113223	(Matroosfontein)	45105	Industrial	Commenced or Completed
3	37145	Milnerton	28507	Industrial	Commenced or Completed
4	38394-RE	Milnerton	24768	Industrial	Commenced or Completed
5	22937	Parow	24639	Industrial	Commenced or Completed
Total			176029		

Table C6-c: Top 5 industrial building plans in terms of the largest floor area from 2020 - 2025.

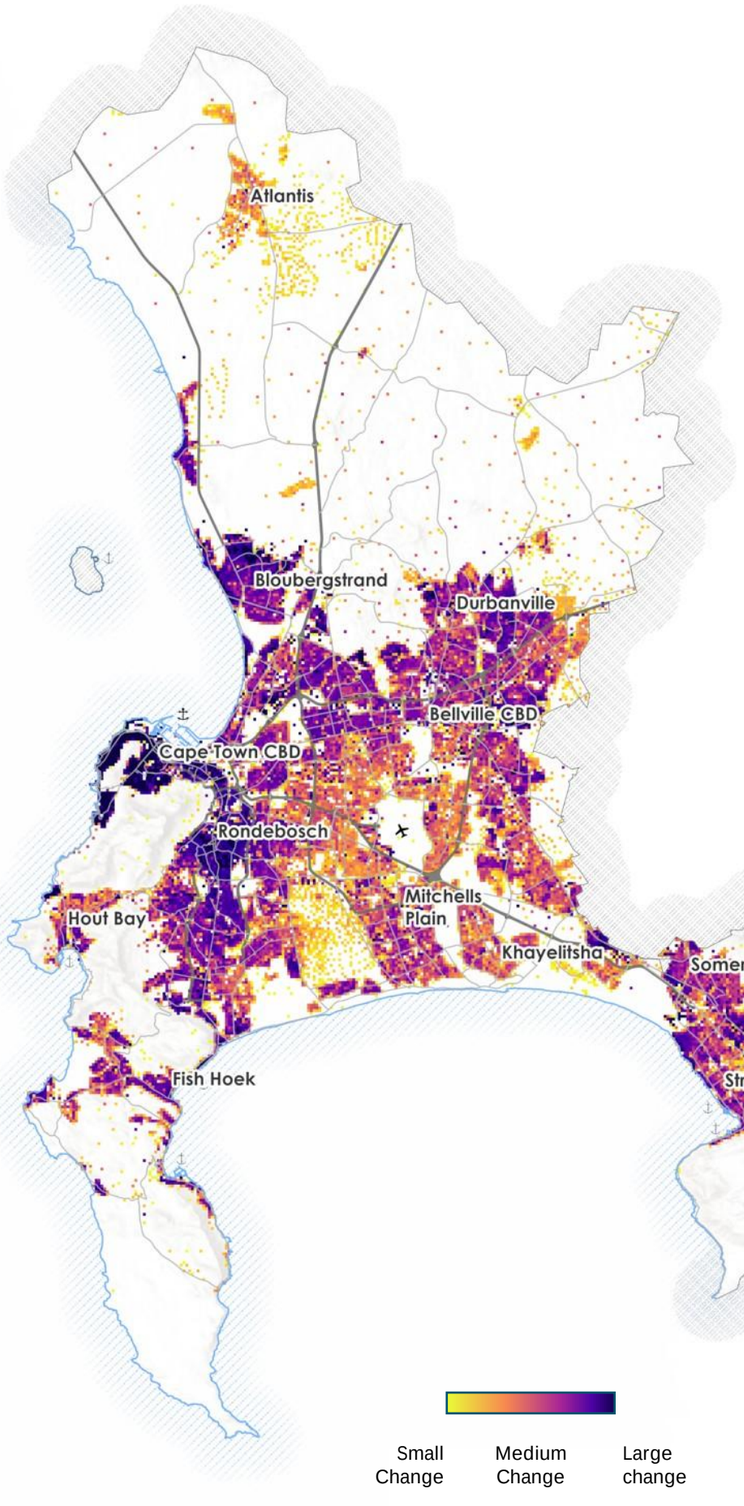
C.7

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)

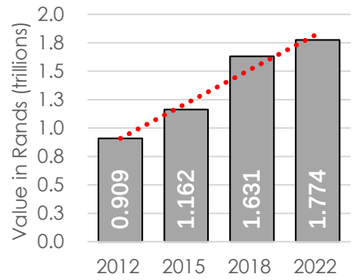


Map C7-a: Change in property value (2012 to 2022)

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.

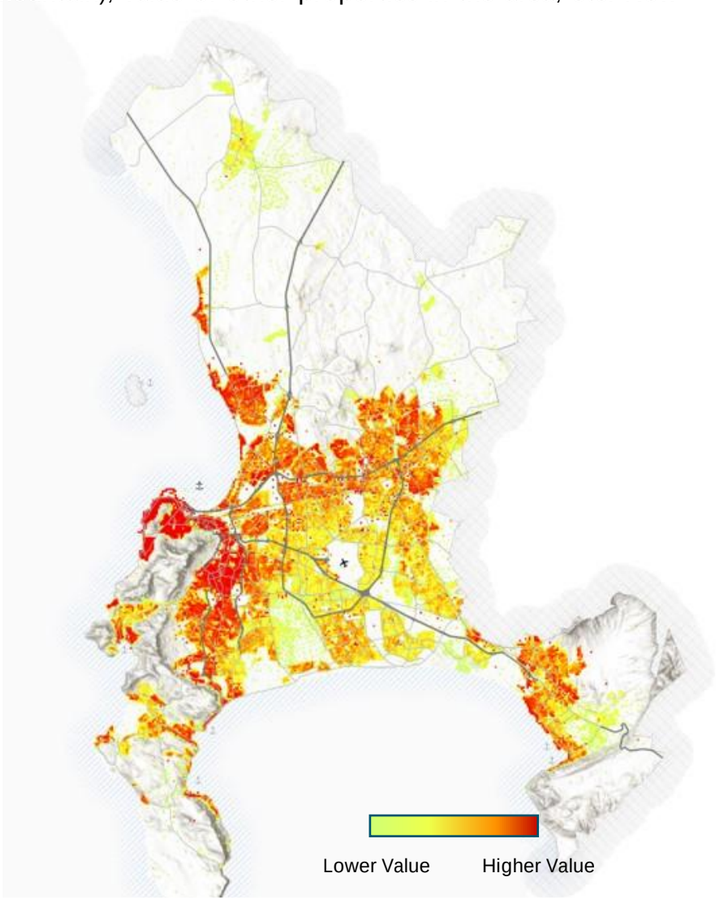
SPATIAL TREND (DISTRIBUTION/PATTERN)

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

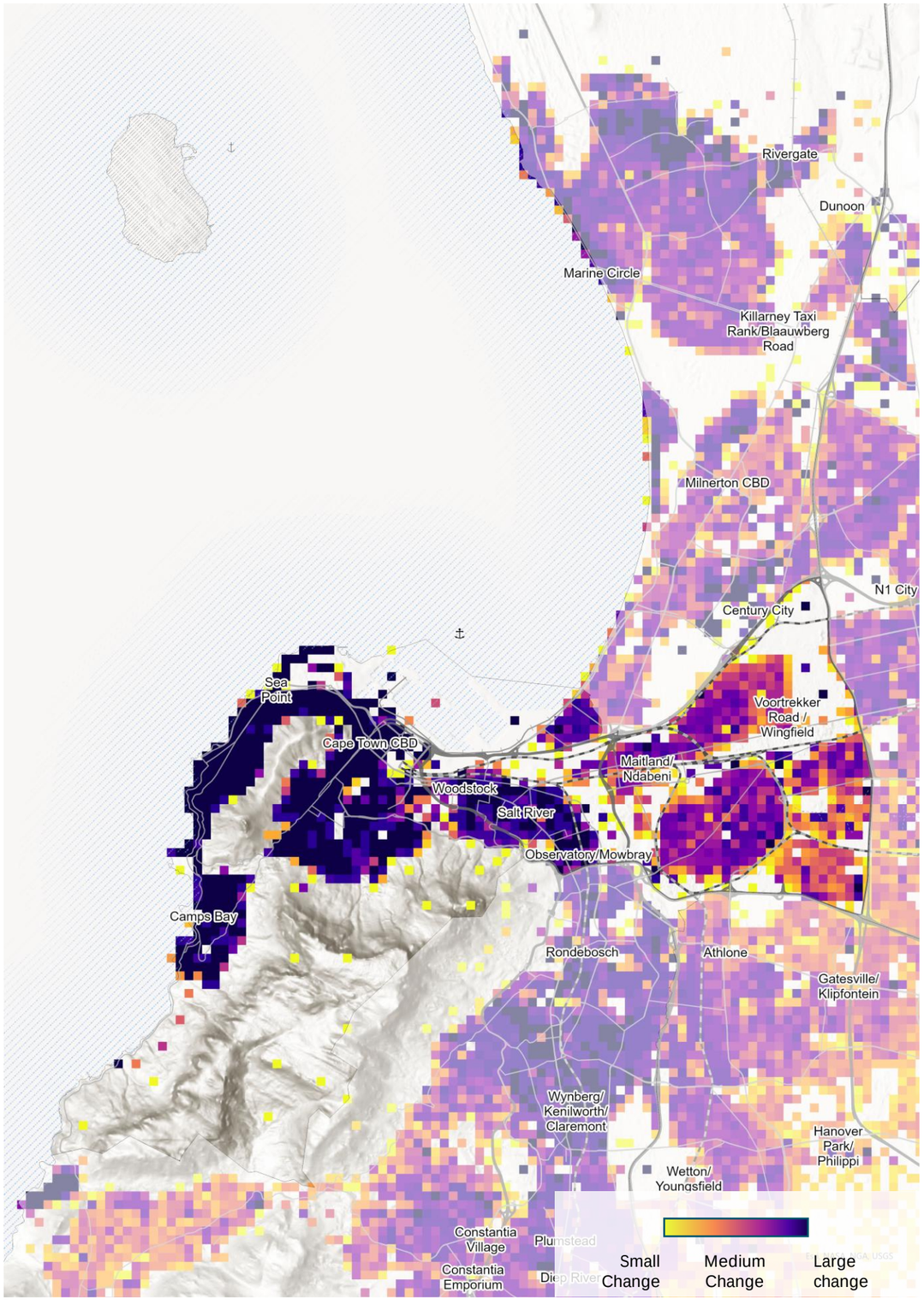
C.7

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.

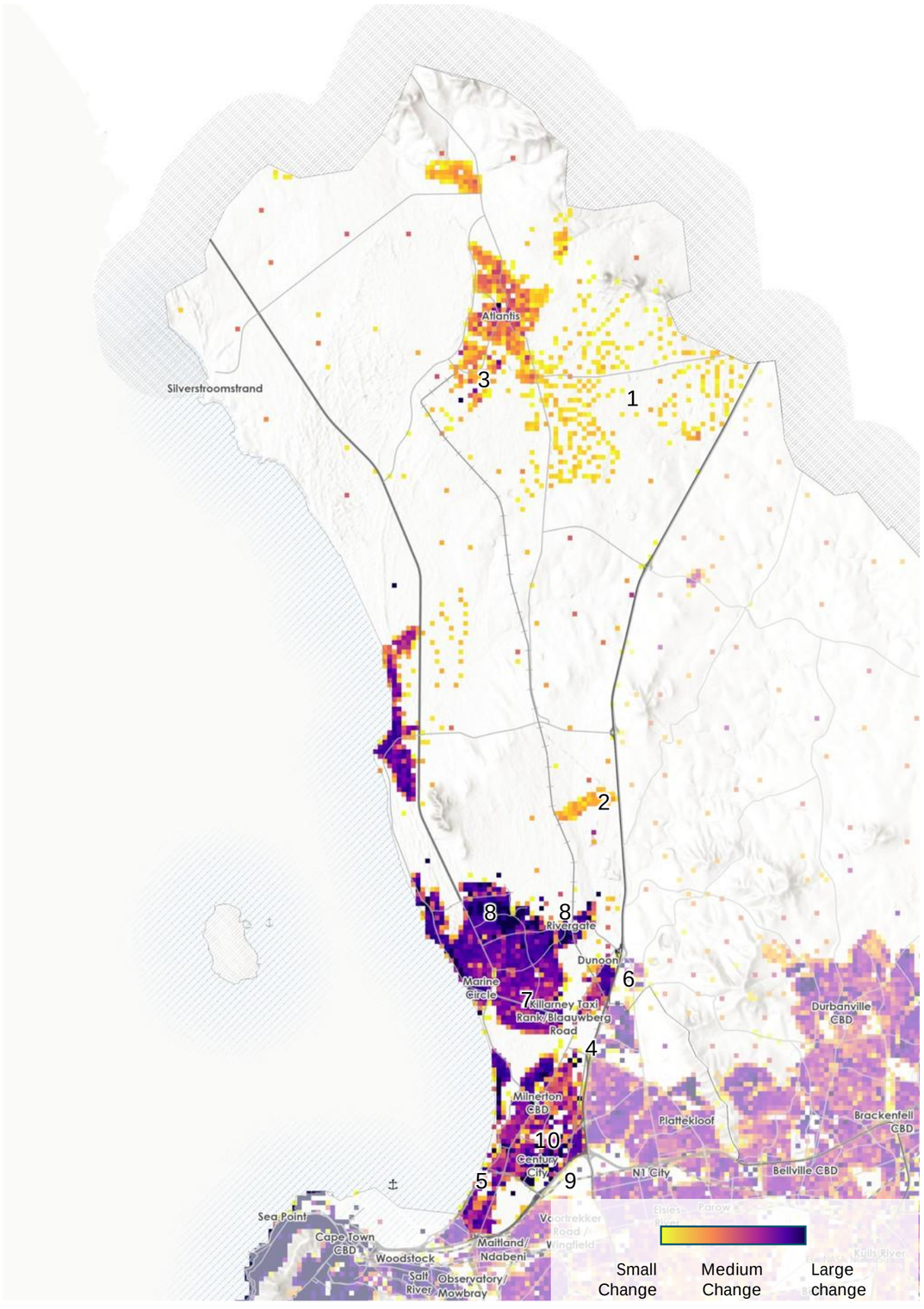
C.7

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.

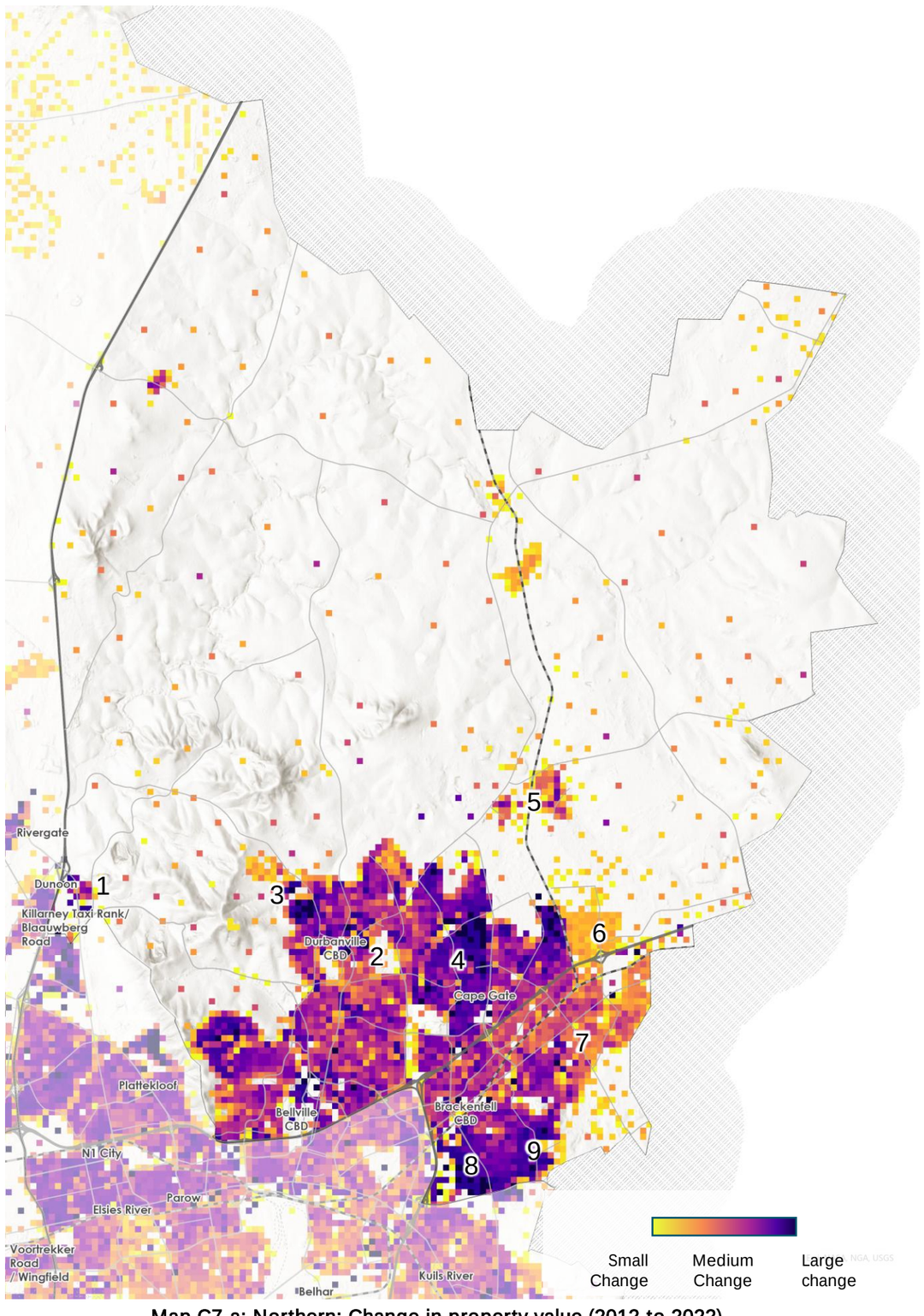
C.7

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.

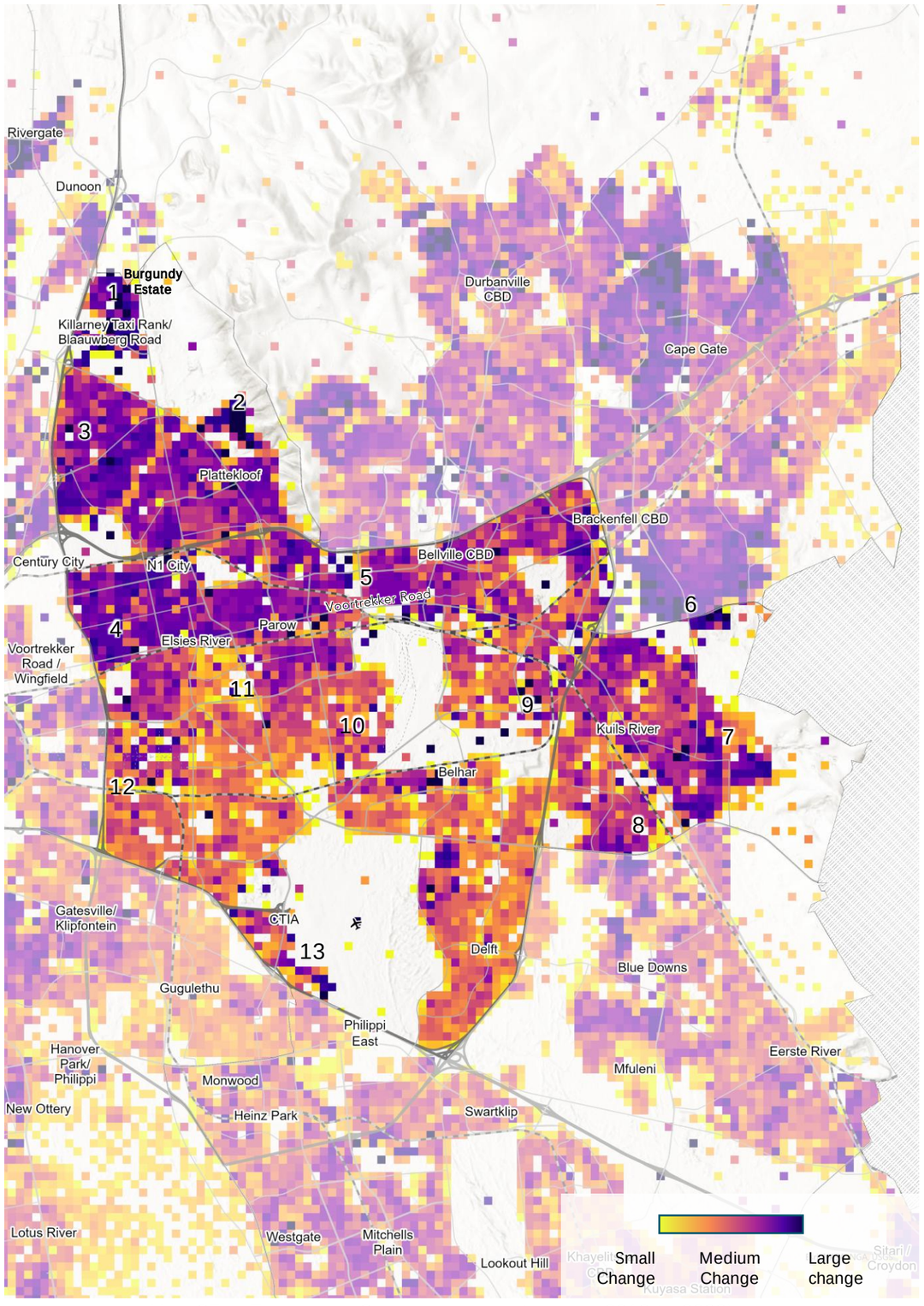
C.7

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.

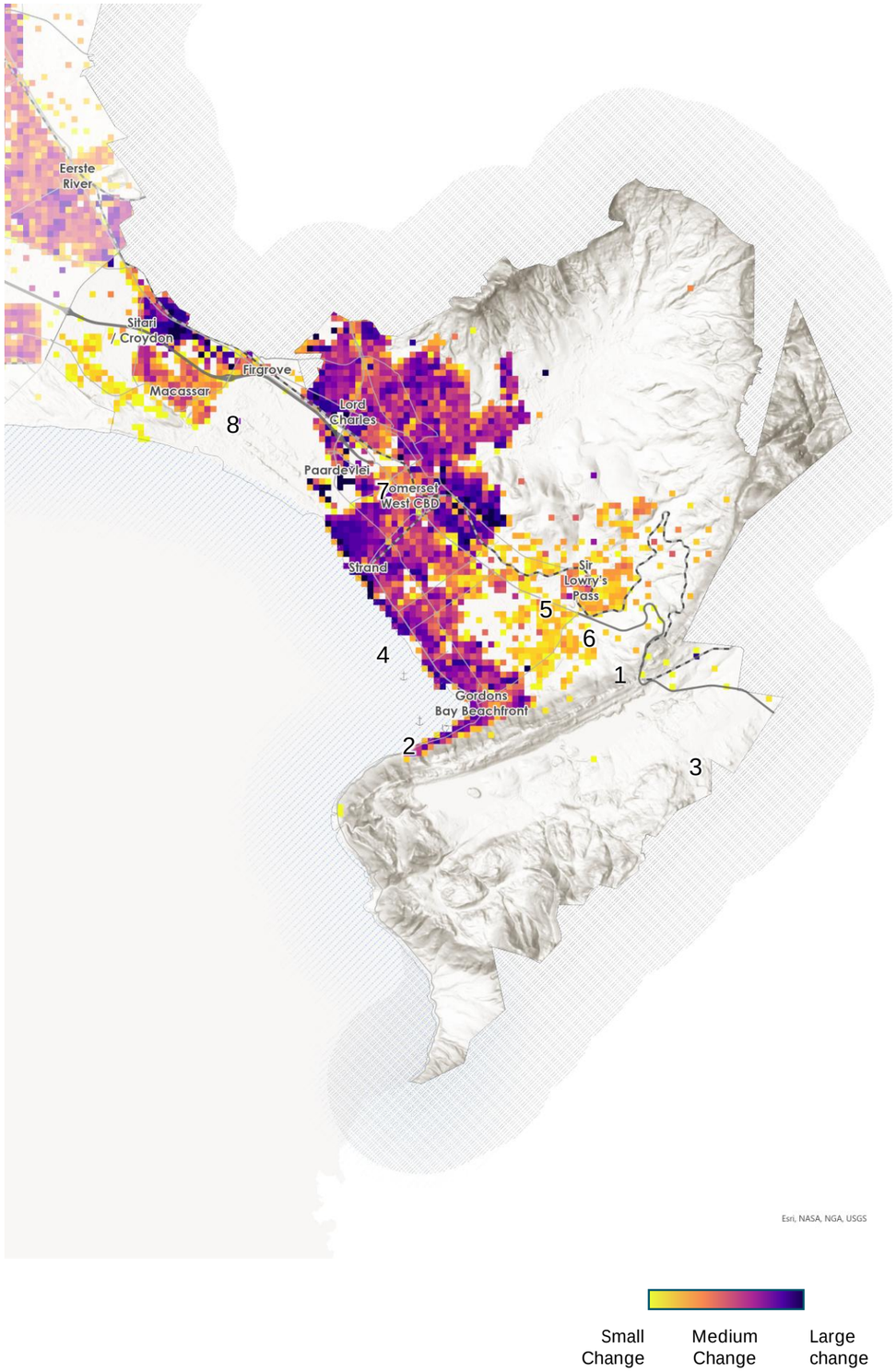
C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

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: 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.

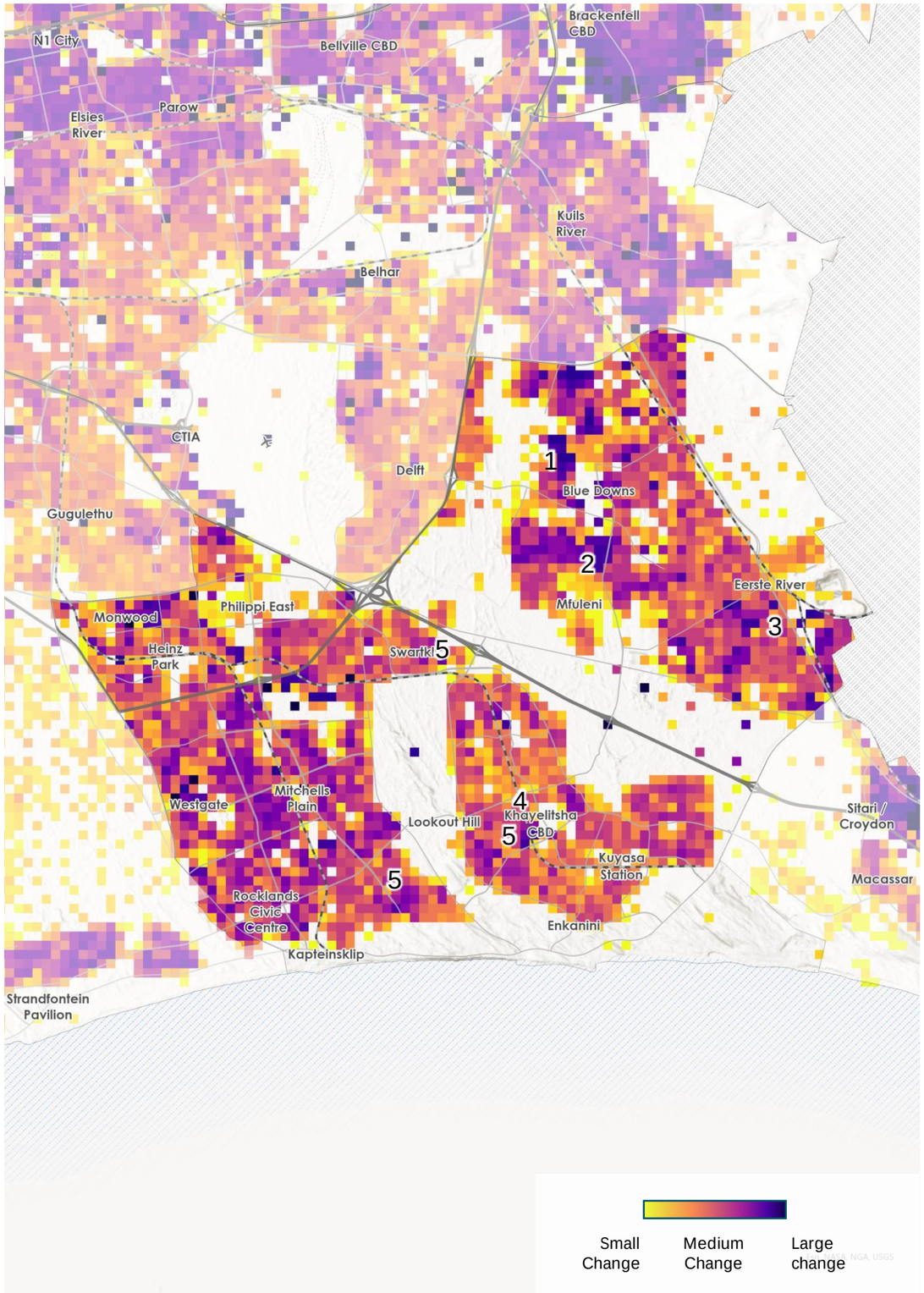
C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

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 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.

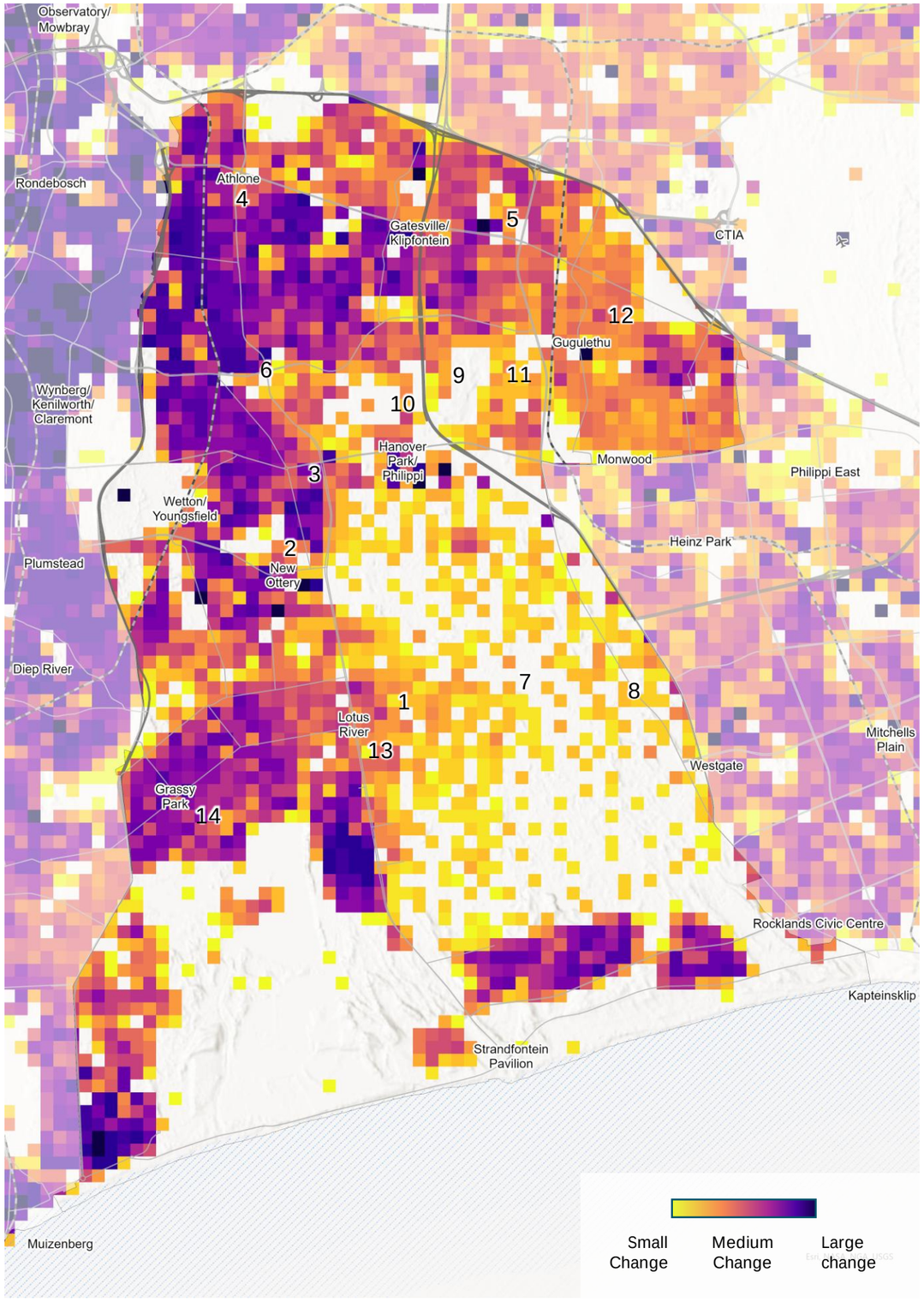
C.7

LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE (DISTRICT)

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: 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.

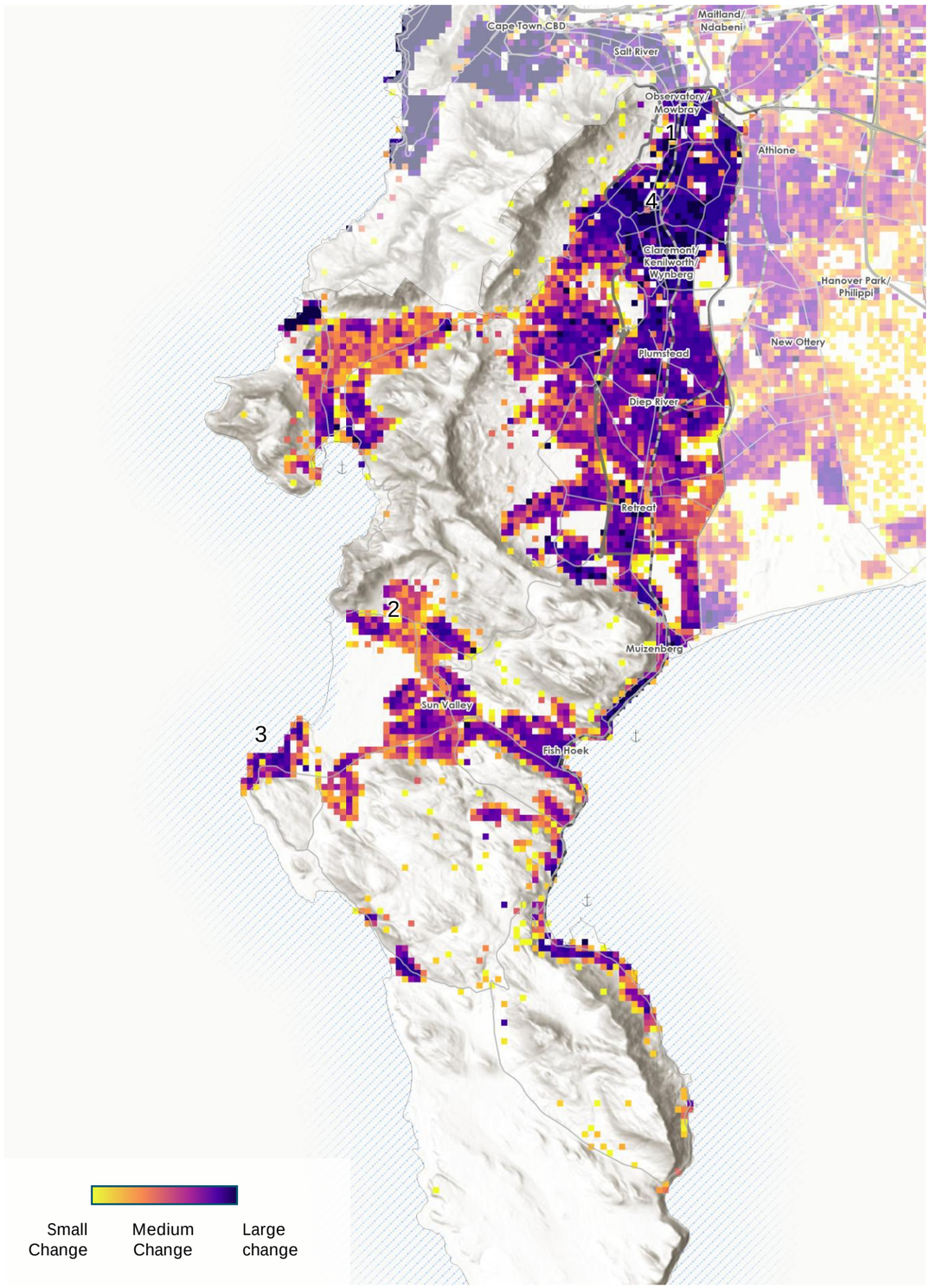
C.7

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.

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

D1 : New Development Areas (2025 Update)

D2 : Areas of informality

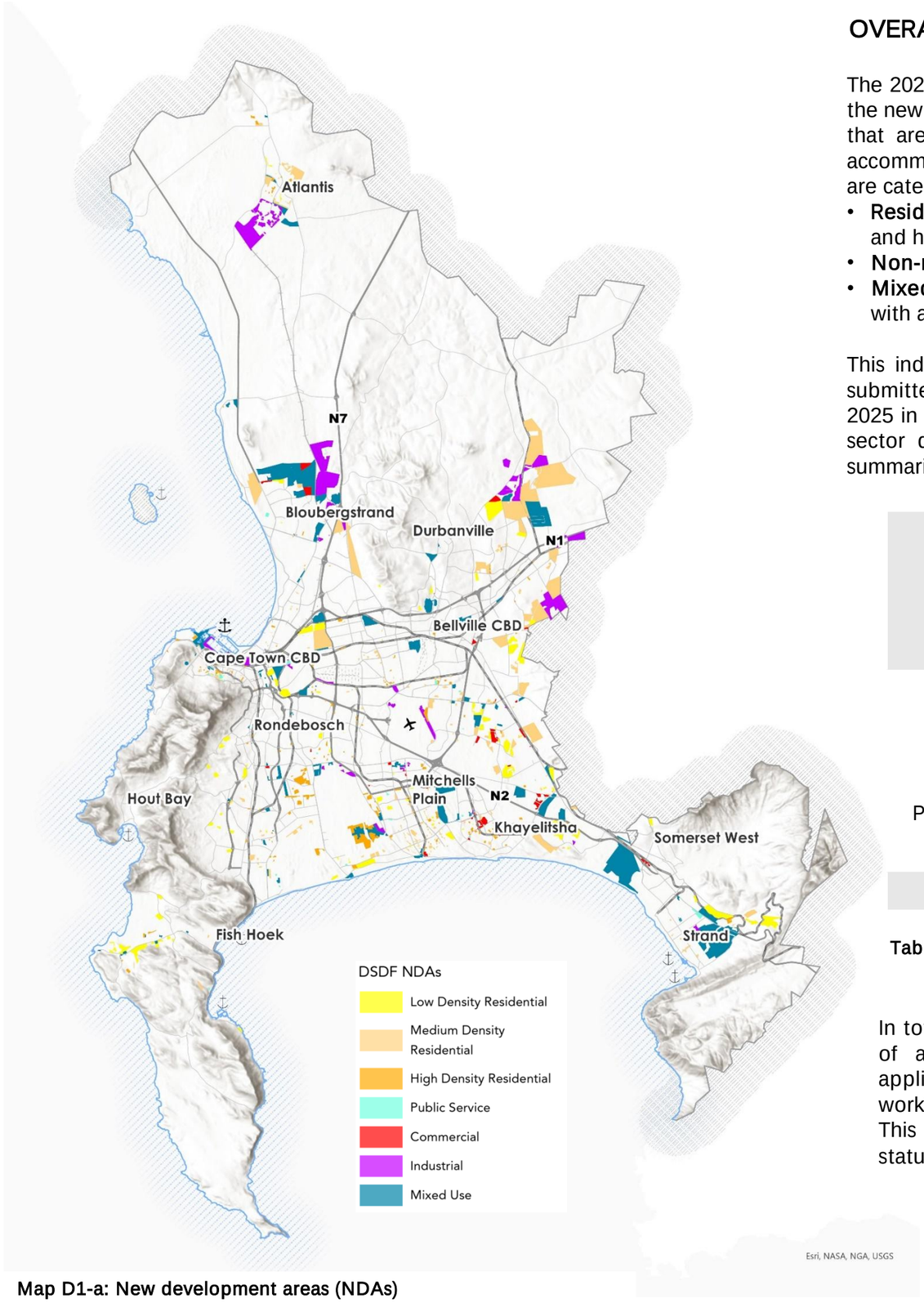
CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

LAND AND BUILDING DEVELOPMENT

TAKE-UP OF NEW DEVELOPMENT AREAS

This indicator monitors the take-up of NDAs by analysing approved building plan applications submitted, approved, commenced and constructed from DAMS between January 2020 and April 2025 located in the NDAs targeted by the DSDF.

Source: DAMS Building Plan Data – January 2020 – April 2025; NDAs – DSDF 2023 and LUM 2040



Map D1-a: 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 D1-a. 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:

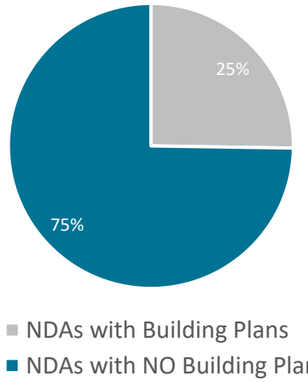
- **Residential NDAs:** Land targeted for potential low gross density (25-45 du/ha), medium gross density (45-75 du/ha) and high gross density (>75 du/ha) residential development.
- **Non-residential NDAs:** Land targeted for commercial, industrial or public service development.
- **Mixed-use NDAs:** 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 were submitted, approved, commenced construction or have been completed in the period between January 2020 and April 2025 in 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.

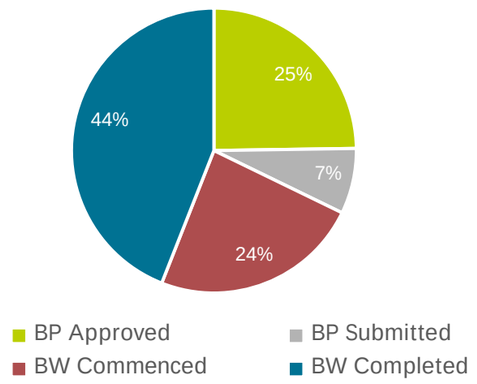
NDA category	Number of NDAs	Area (ha)	NDAs with BPs (no.)
Residential	543	6576	106
Mixed use	139	4362	58
Commercial	50	359	16
Public services	22	94	4
Industrial	78	2194	26
Total	**832**	**13585**	**210**

Table D1-a: NDAs with building plans in construction/completed (Jan 2020 – April 2025)

In total, the DSDF identified 832 NDA sites with a combined land extent of approximately 13 583 ha. Approximately 10476 building plan applications (submitted, approved, commenced or completed building work) from January 2020 to April 2025 were located inside 210 NDAs. This represents 25% of all NDAs that were approved in the DSDF. The status composition of the building plans are depicted in graph D1-b.



Graph D1-a: NDAs with Building Plan Applications (Jan 2020 – April 2025)



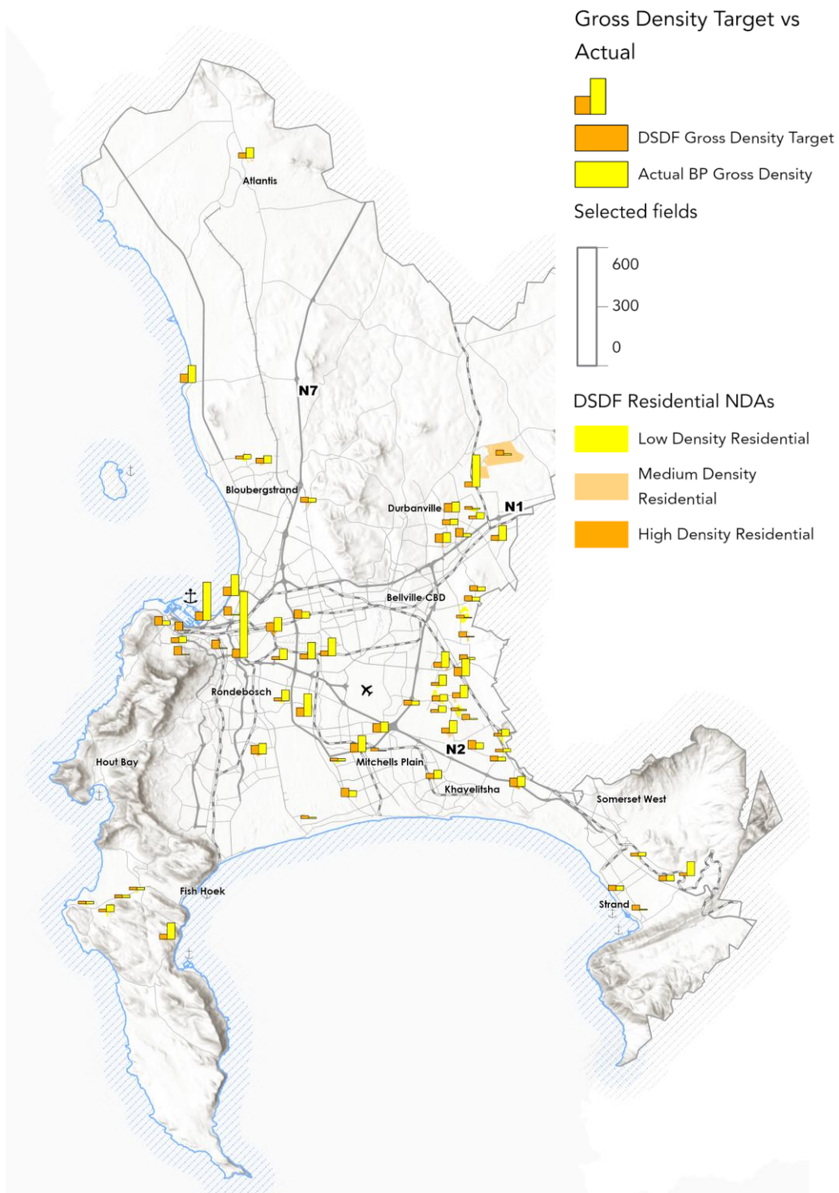
Graph D1-b: Status of Building Plan Applications (Jan 2020 – April 2025)

LAND AND BUILDING DEVELOPMENT

TAKE-UP OF NEW DEVELOPMENT AREAS

This indicator monitors the take-up of NDAs by analysing approved building plan applications submitted, approved, commenced and constructed from DAMS between January 2020 and April 2025 located in the NDAs targeted by the DSDF.

Source: DAMS Building Plan Data – January 2020 – April 2025; NDAs – DSDF 2023 and LUM 2040



Map D1-b: Nett Density of Residential Development Constructed or in Construction between 2020 – April 2025 in DSDF Residential NDAs by District and Metro

DISTRICT TRENDS

At a cumulative district scale, the gross density of building plans in high density development NDAs meet or exceed their target. In medium density and low density NDAs, the actual and target densities differ. In Table Bay, Helderberg and Cape Flats, building plan densities significantly exceed their targets in medium density NDAs. Conversely in low density NDAs, actual gross densities in Northern, Tygerberg and Helderberg are below the target and are achieving thresholds associated with low density NDAs. See graph D1c.

RESIDENTIAL NDAs

This section focuses on the portion of residential NDAs that have been taken up in terms of building plans submitted, approved, commenced and constructed in the period between January 2020 and April 2025, which amounts to approximately 20% of the total residential NDAs. It is important to note that 38 NDAs (containing a total of 384 building plan applications) with a gross density of less than 5du/ha were removed from the dataset as they were considered outliers (they yielded insignificant units with a significant gross area).

GENERAL ANALYSIS AND TRENDS

From January 2020 to April 2025 , 15993 residential units were or are in the process of being developed from 6587 Building Plan Applications (submitted, approved, commenced and constructed) across 68 Residential NDAs in Cape Town. The gross density of these applications are depicted in Map D1-b and Graph D1-a below.

Map D1-b 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 building plan applications between January 2020 and April 2025 (yellow bar) compared to the DSDF targets (orange bar). Graph D1-c shows the composite gross density of build plan applications per district between January 2020 and April 2025 in relation to their DSDF target.

The majority of building plan applications (submitted, approved, commenced and constructed) are developed at a density equivalent to or surpassing the DSDF gross density targets for site specific NDAs, 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.

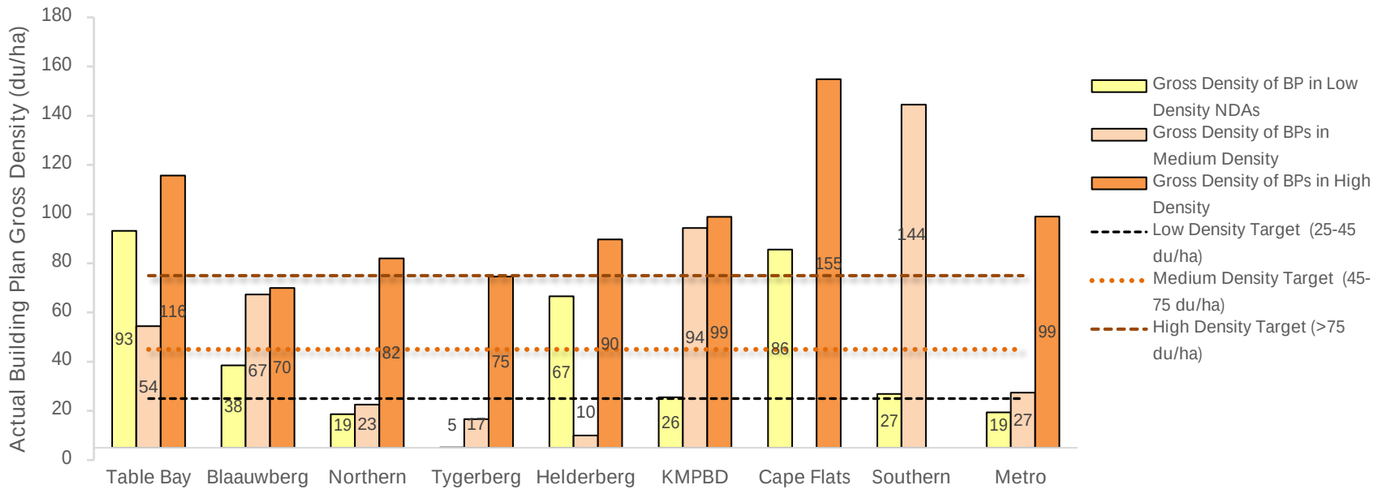


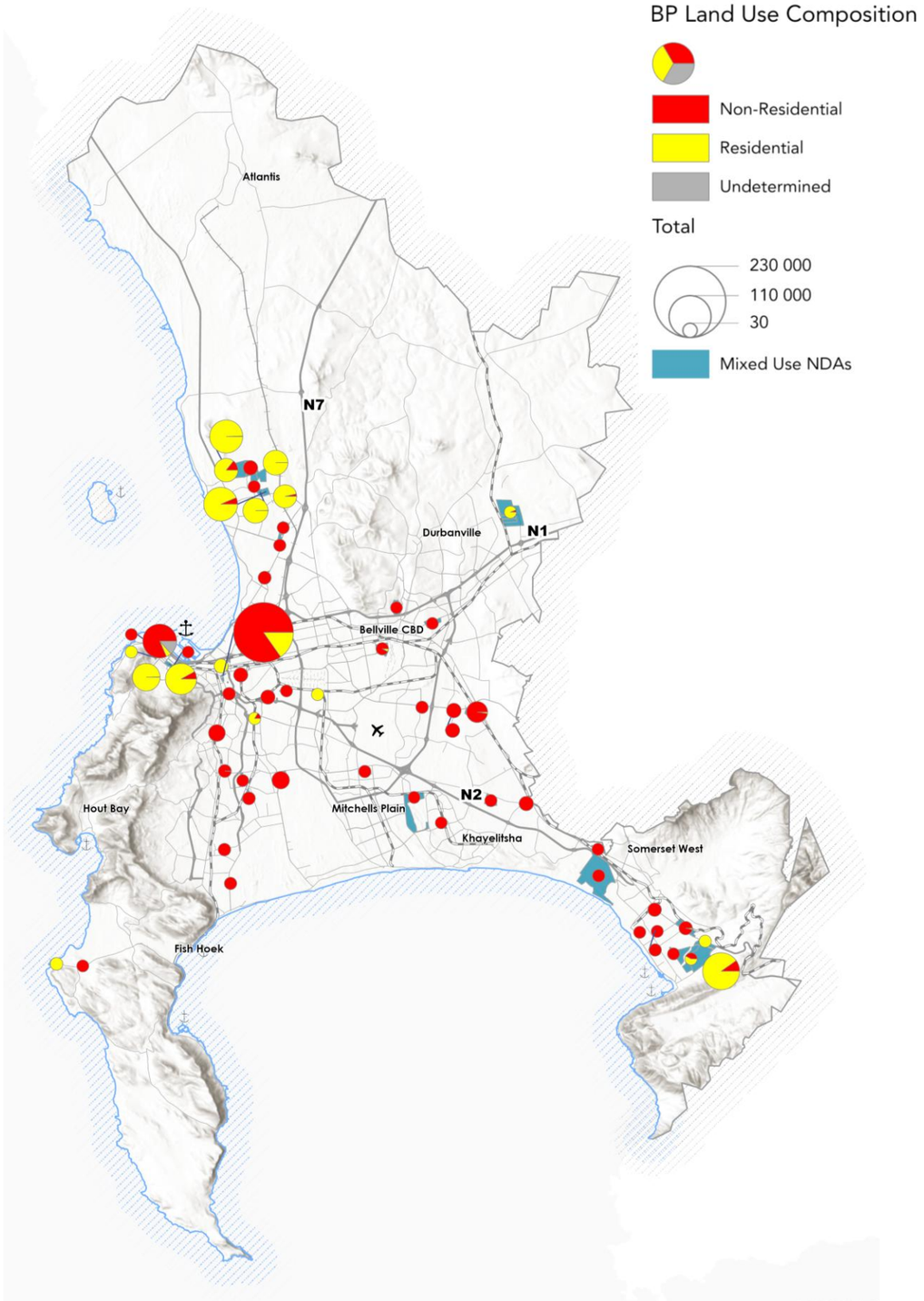
	Table Bay	Blaauwberg	Northern	Tygerberg	Helderberg	KMPBD	Cape Flats	Southern	Metro
Count of Low Density NDAs with BPs	1	1	2	1	2	7	2	4	20
Count of Medium Density NDAs with BPs	1	2	7	5	3	7	0	1	22
Count of High Density NDAs with BPs	7	3	3	2	1	4	2	0	26
Total	9	6	12	8	6	18	4	5	68

Graph D1-c: Comparison of Actual Gross Density vs. Gross Density Targets by DSDF Residential NDAs)

TAKE UP OF NEW DEVELOPMENT AREAS

This indicator monitors the take-up of NDAs by analysing approved building plan applications submitted, approved, commenced and constructed from DAMS between January 2020 and April 2025 located in the NDAs targeted by the DSDF.

Source: DAMS Building Plan Data – January 2020 – April 2025; NDAs – DSDF 2023 and LUM 2040



Map D1-c: 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 submitted, approved, commenced and constructed in the period between January 2020 and April 2025, which amounts to approximately 42% of the total mixed-use NDAs in terms of the number of sites – see table D1-a.

SPATIAL TRENDS

From January 2020 to April 2025 , a total building floor area of 1 298 278 m² (42% Non-Residential, 57% Residential and 1% Undetermined) was or is in the process of being developed from 2340 Building Plan Applications (submitted, approved, commenced and constructed) across 58 Mixed Use NDAs in Cape Town.

Map D1-c and graph D1-b depict the quantum of residential to non-residential development (GLA) in construction or that have been completed in relation to the mixed-use NDAs (the map on site by site level and the graph at cumulative district level). The size of pie charts on Map D1c and composite bars in Graph D1-c indicates the total extent of building plan floor area.

Table Bay, Blaauwberg and Helderberg experienced the most development in mixed use NDAs. Whilst there is a significant mix in Table Bay (concentrated in the River Club and Granger Bay), demonstrating positive alignment to the DSDF, there is greater extent of residential development in Blaauwberg and Helderberg demonstrating somewhat poorer alignment, however this could change as new BP applications are submitted and developed in the future.

Marginal development occurred in mixed use NDAs in the other 5 remaining districts which were dominated by non-residential development. Important to note, 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.

At metro scale, there is currently 4:6 ratio of non-residential to residential development for all mixed use NDAs.

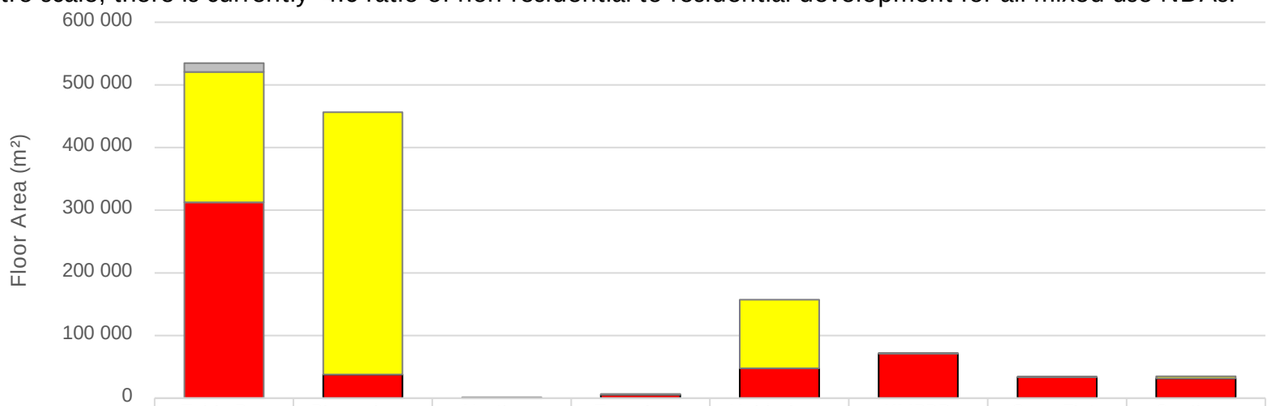


	Table Bay	Blaauwberg	Northern	Tygerberg	Helderberg	KMPBD	Cape Flats	Southern
Sum of Undetermined	14 192							
Sum of Residential	207 986	418 520	1 286	1 574	109 501	987	1 158	3 408
Sum of Non-Residential	312 512	37 813	154	5 314	47 879	71 048	33 529	31 417

Graph D1-c: Composition of residential and non-residential building plan submissions in relation to mixed use NDAs

D.1d

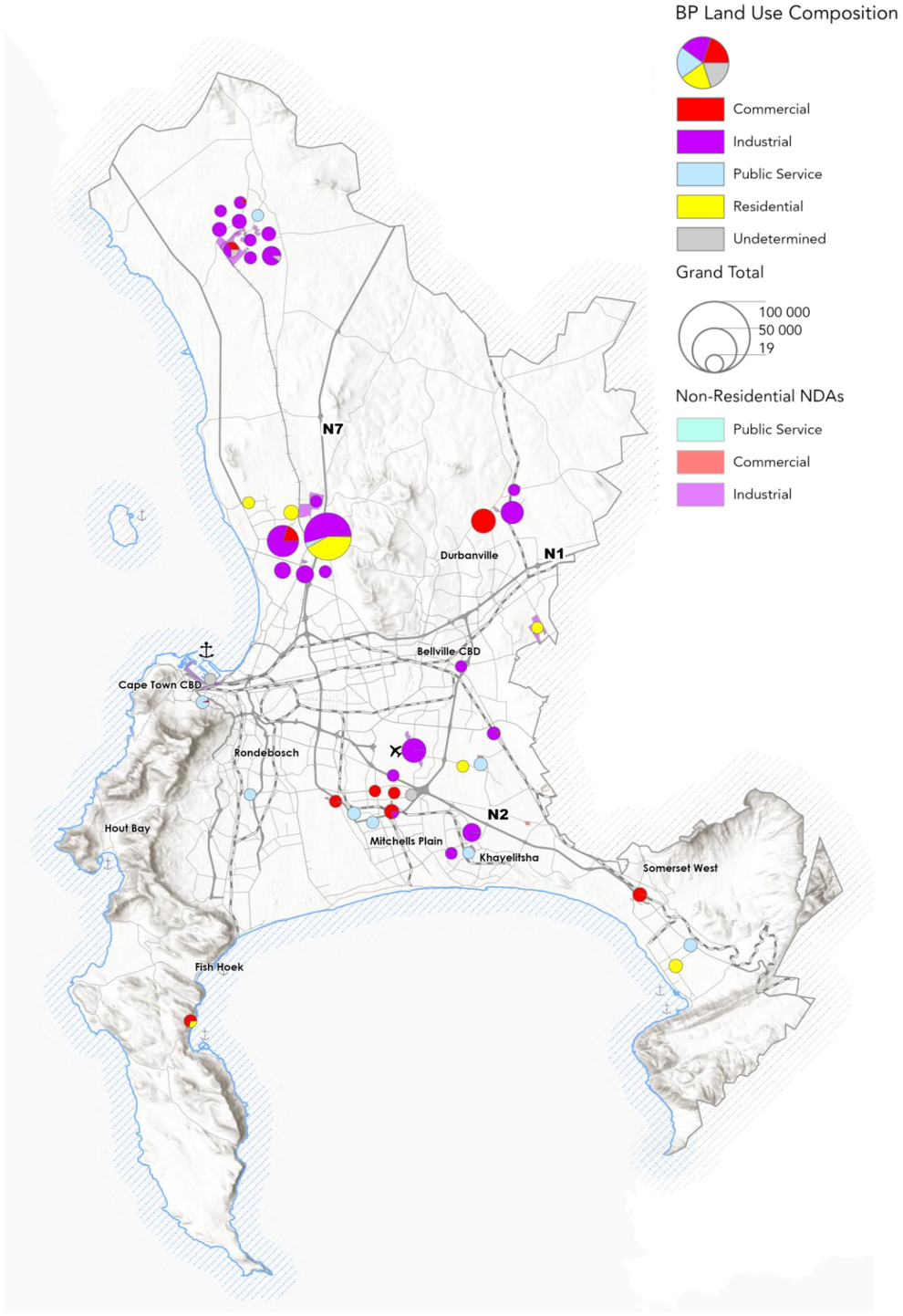
LAND AND BUILDING DEVELOPMENT

TAKE-UP OF NEW DEVELOPMENT AREAS

2025 Update

This indicator monitors the take-up of NDAs by analysing approved building plan applications submitted, approved, commenced and constructed from DAMS between January 2020 and April 2025 located in the NDAs targeted by the DSDF.

Source: DAMS Building Plan Data – January 2020 – April 2025; NDAs – DSDF 2023 and LUM 2040



Map D1-d: 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 plans submitted, approved, commenced and constructed in the period between January 2020 and April 2025 related to said NDAs. This amounts to approximately 31% of the total non-residential NDAs in terms of the number of sites.

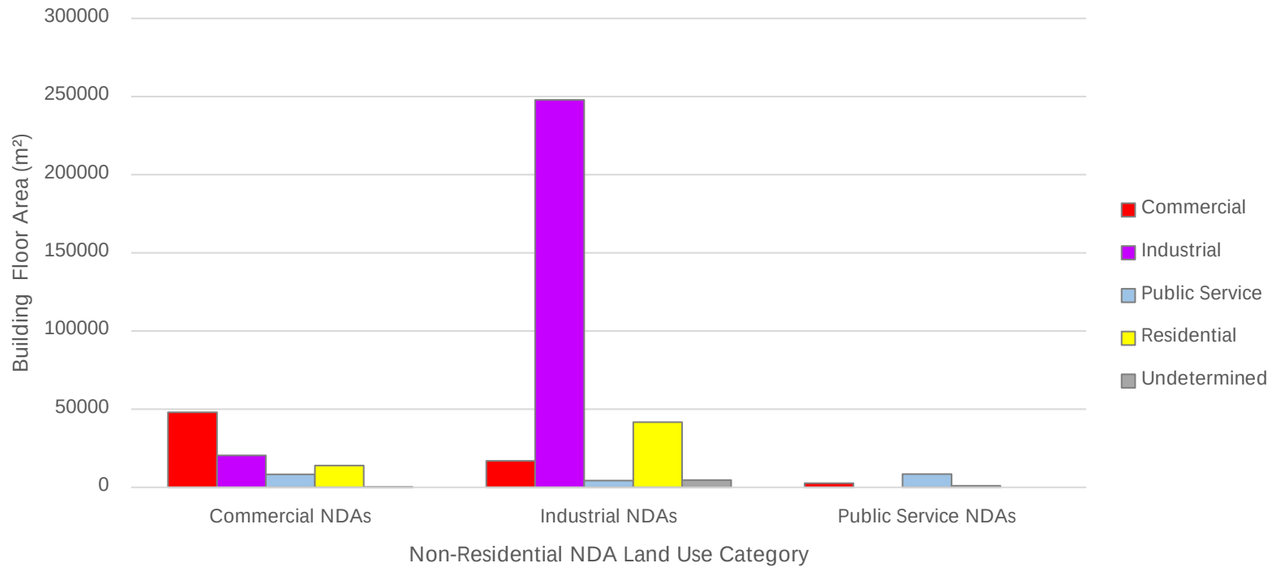
SPATIAL TRENDS

From January 2020 to April 2025 , a total building floor area of 420 636 m² was or is in the process of being developed from 706 Building Plan Applications (submitted, approved, commenced and constructed) across 46 Commercial, Industrial and Public Service NDAs in Cape Town.

Map D1-d depicts the sum of building floor area of commercial, industrial, public service and residential development in terms of building plan (BP) applications (submitted, approved, commenced and constructed) between January 2020 and April 2025. The BPs are extracted and added in relation to each non-residential NDA targeted for commercial, industrial or public service development. Graph D1-d shows the cumulative development of BPs relevant 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 thus far is for its intended land use.
- There is currently poor alignment with areas targeted for commercial development as the dominant land use of development is for a combination of other residential, public service and industrial uses.
- Between January 2020 and April 2025, industrial NDAs incurred the most development in terms of building floor area.



Graph D1-d: Composition of non-residential Building Plan floor area in relation to non-residential NDAs

TAKE-UP OF NEW DEVELOPMENT AREAS

- Approximately 10476 building plan applications (submitted, approved, commenced or completed building work) from January 2020 to April 2025 were located inside 210 NDAs. This represents 25% of all NDAs that were approved in the DSDF.

- **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.

- Table Bay, Blaauwberg and Helderberg experienced the most development in mixed use NDAs. Marginal development occurred in mixed use NDAs in the other 5 remaining districts which were dominated by a mix of non-residential development. At metro scale, there is currently 4:6 ratio of non-residential to residential development for all mixed use NDAs.

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

- Between January 2020 and April 2025, **industrial NDAs incurred the most non-residential development in terms of building floor area (m²)**.

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

Map D1d: Comp[illegible]n-residential bps land use in relation to non-residential NDAs

Graph D1d: Composition of non-residential Building Plan floor area in relation to non-residential NDAs

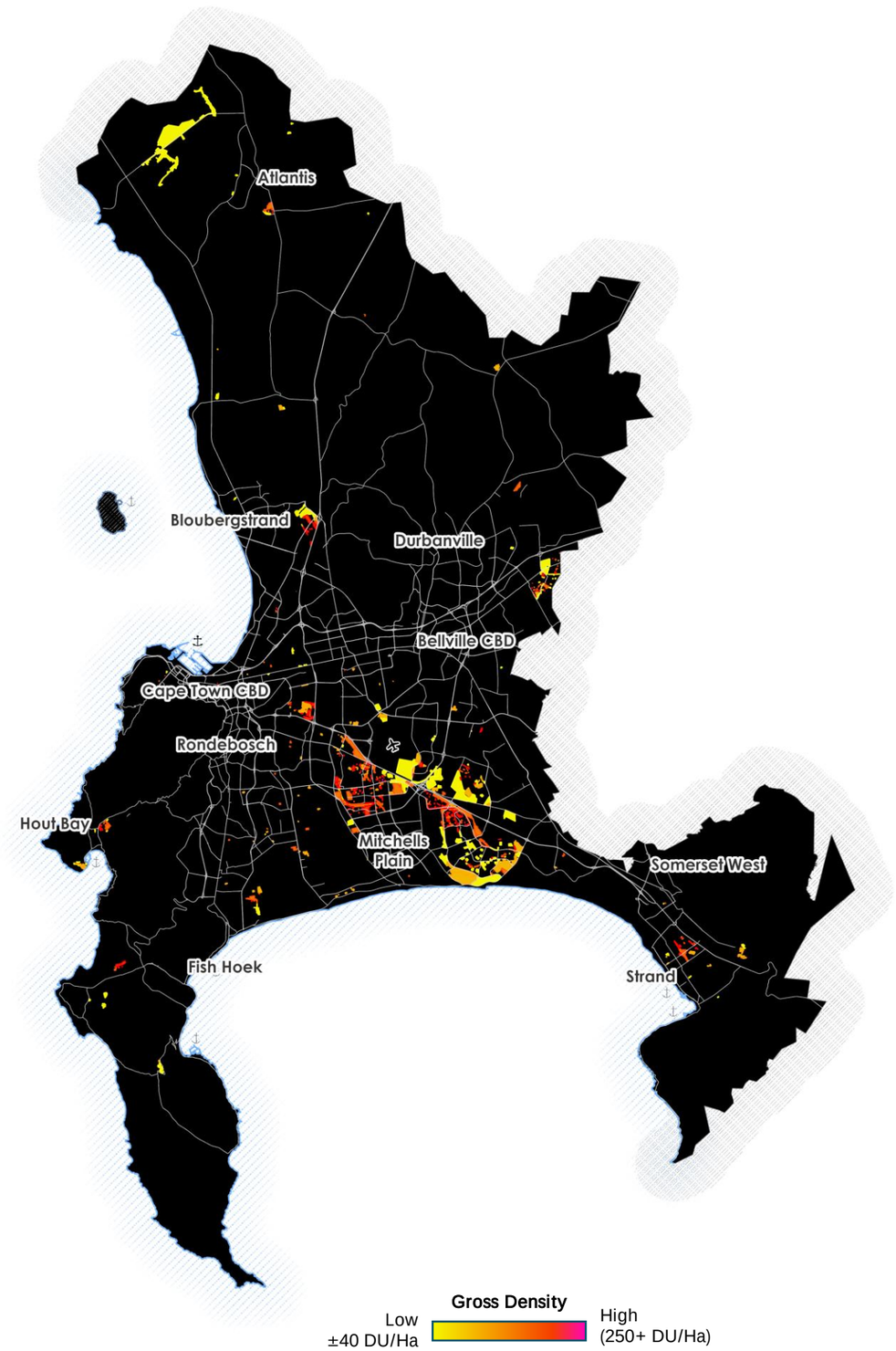
D.2

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).

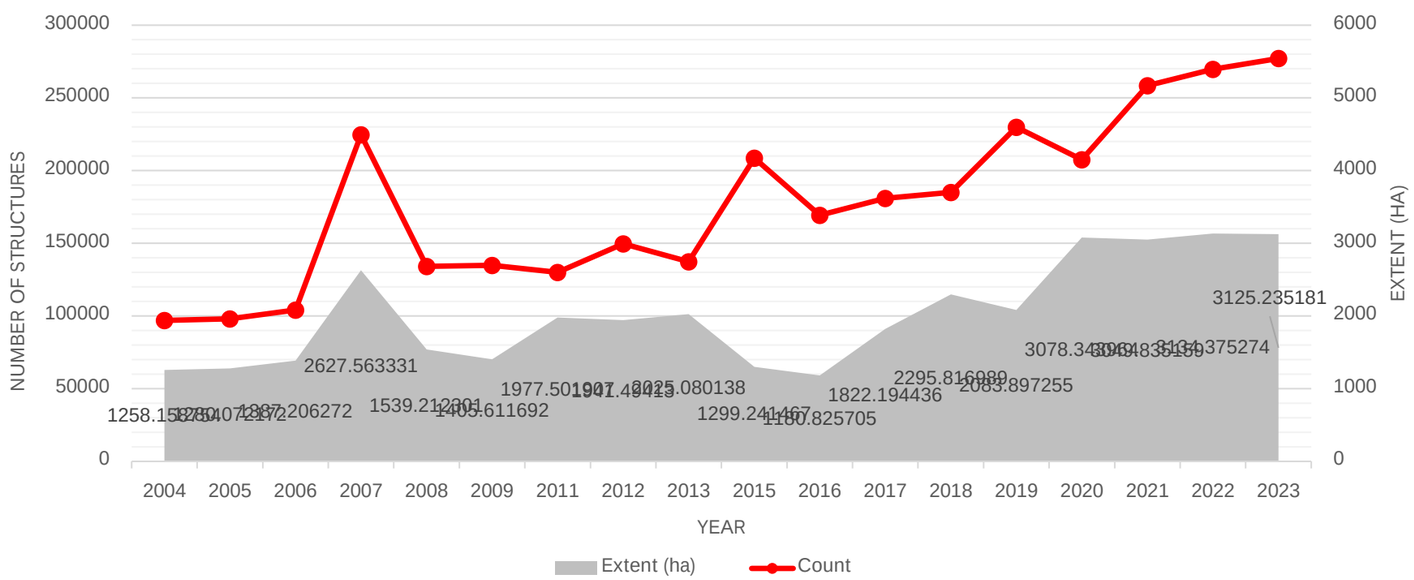
SPATIAL TREND (DISTRIBUTION/ PATTERN)

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)

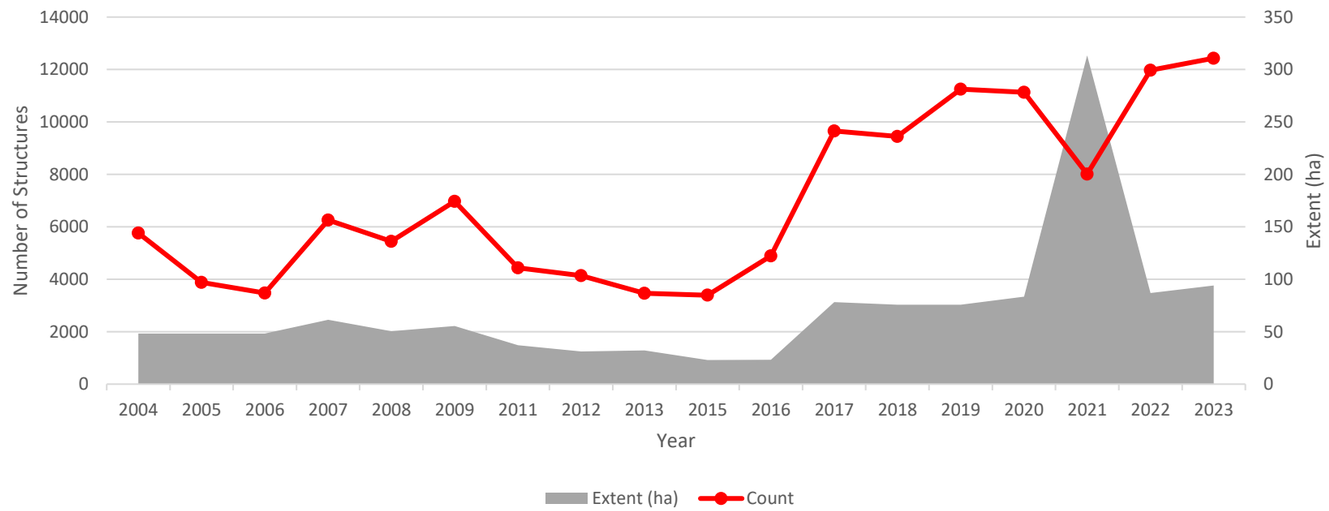
Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the N2, N1 and N7. Within the Table Bay District, areas of informality are concentrated within Langa, which is located along the N2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

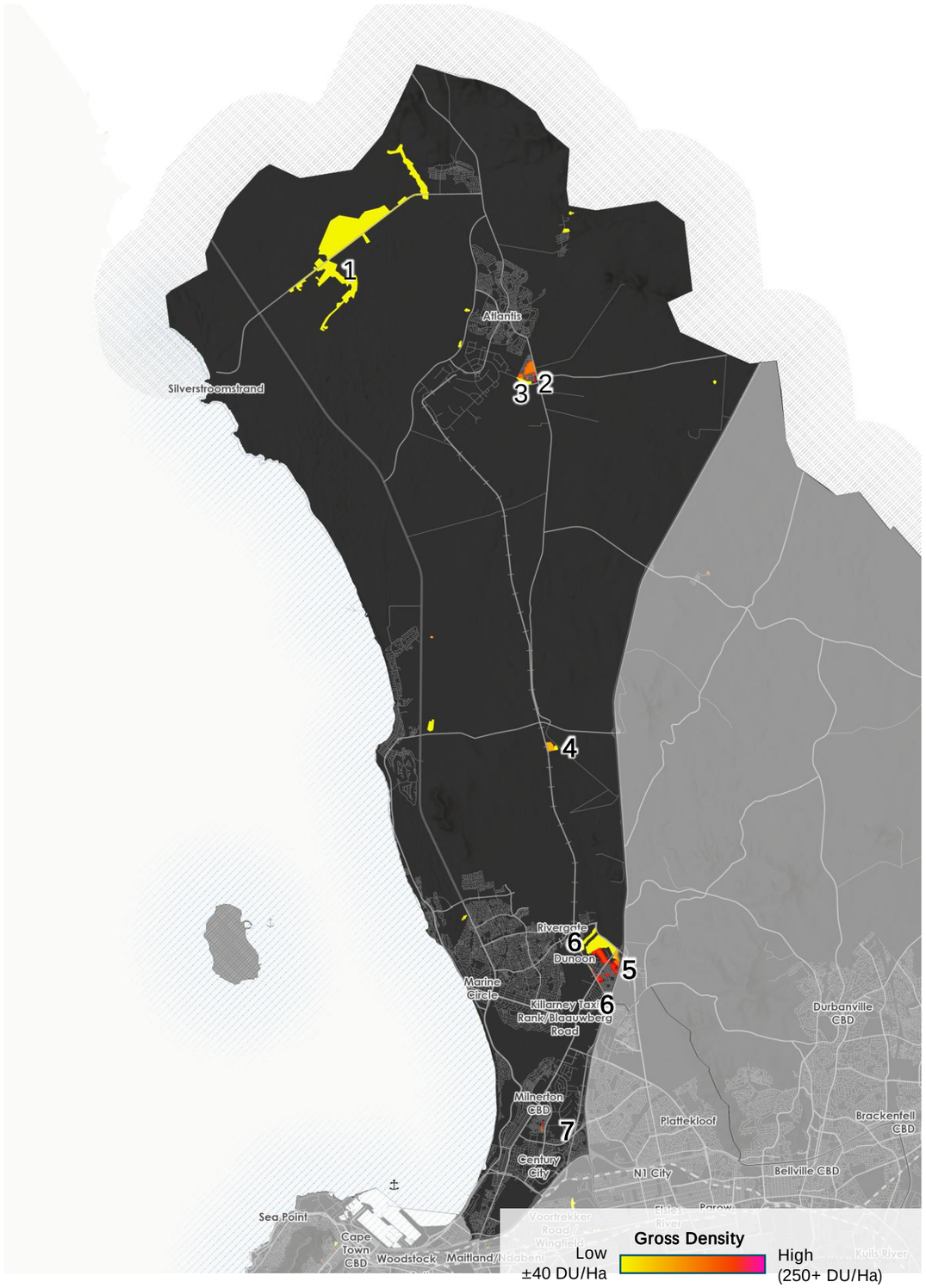
D.2

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)

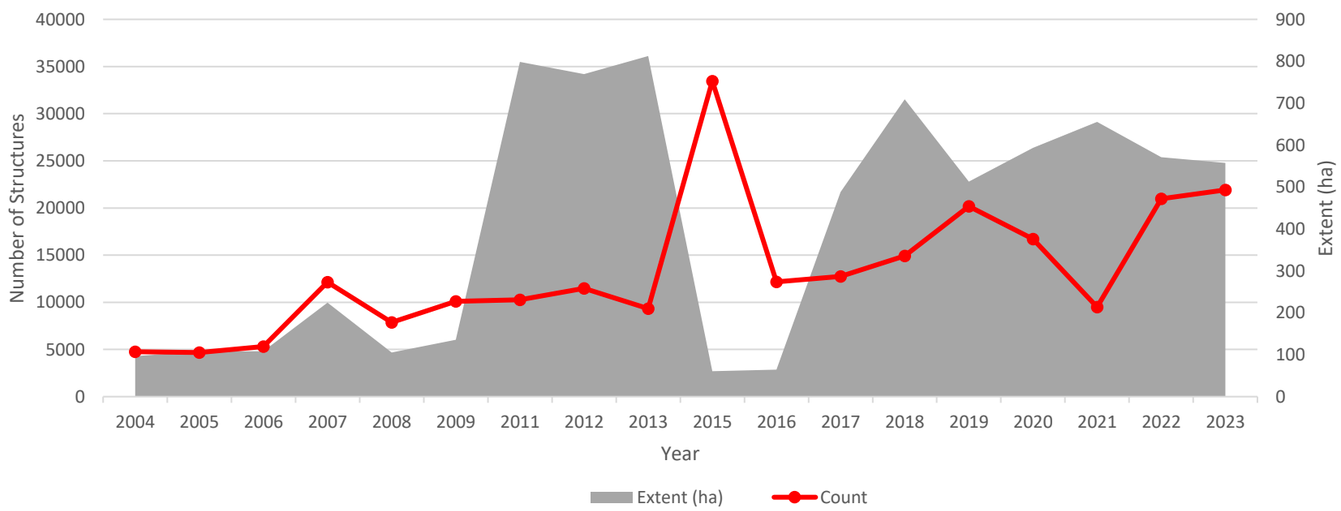
DISTRICT LEVEL ANALYSIS

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

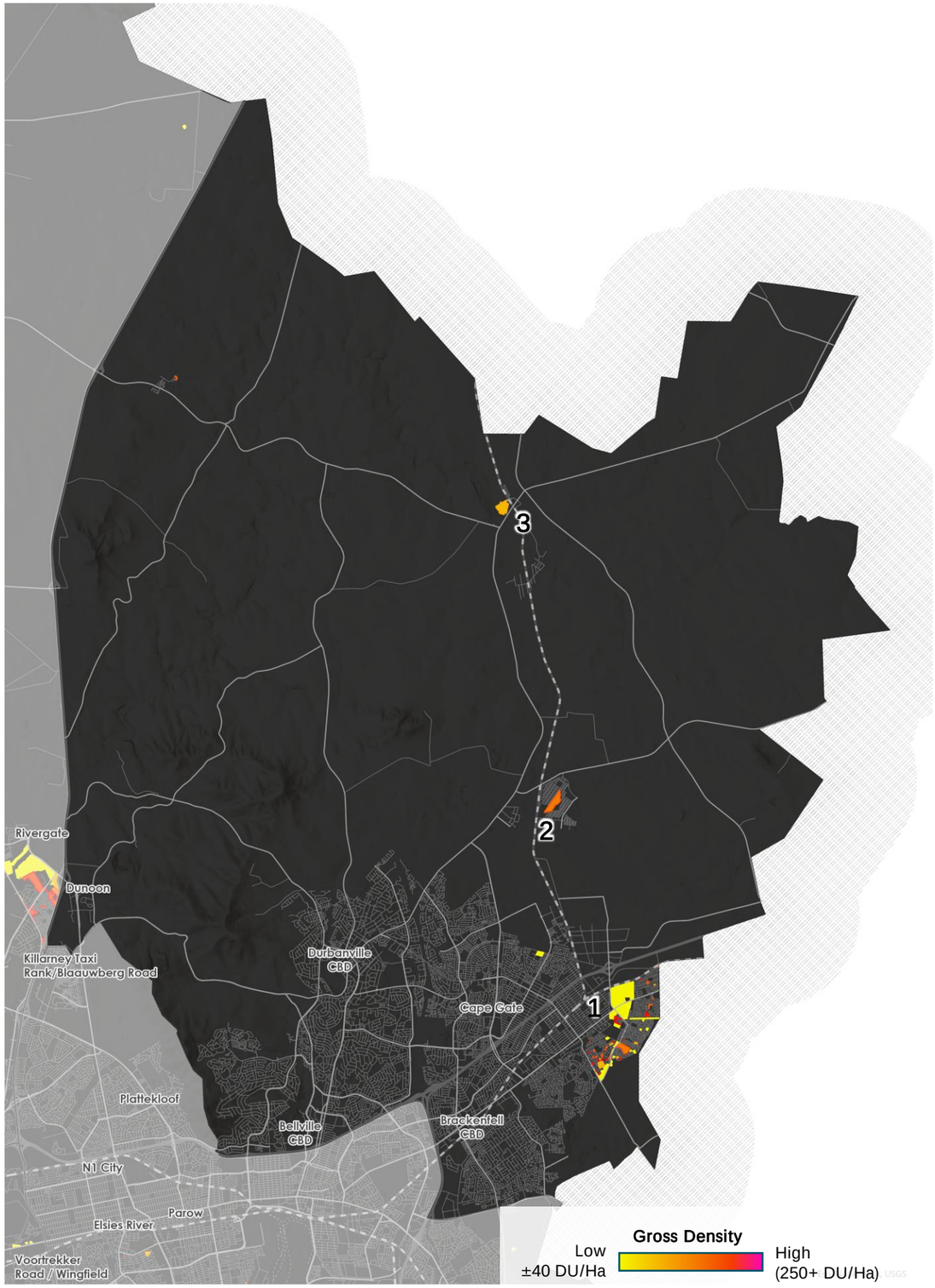
D.2

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)

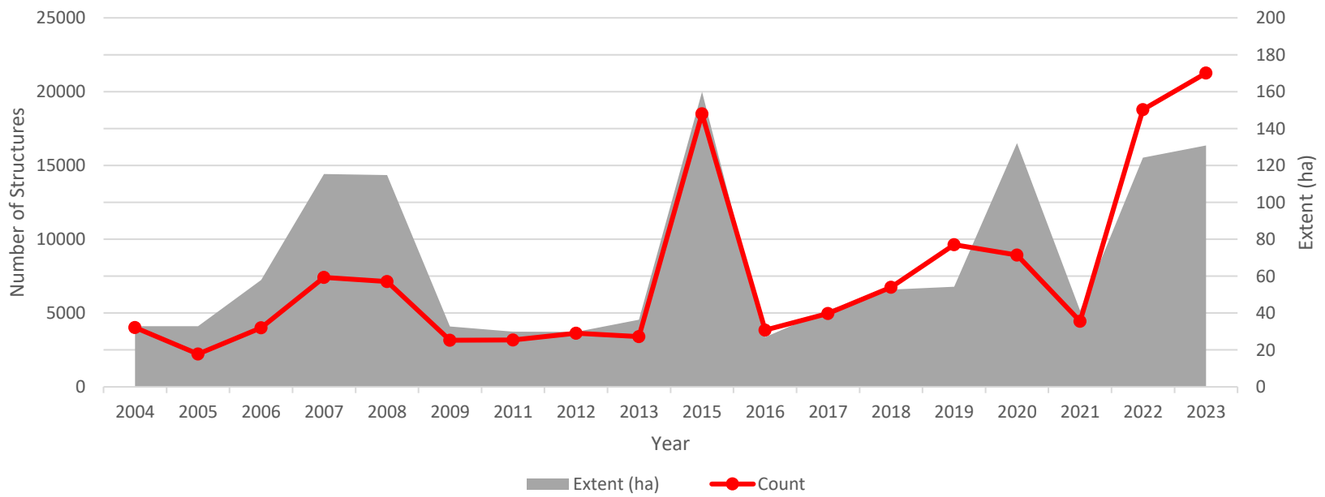
SPACIAL TREND (DISTRIBUTION/PATTERN)

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

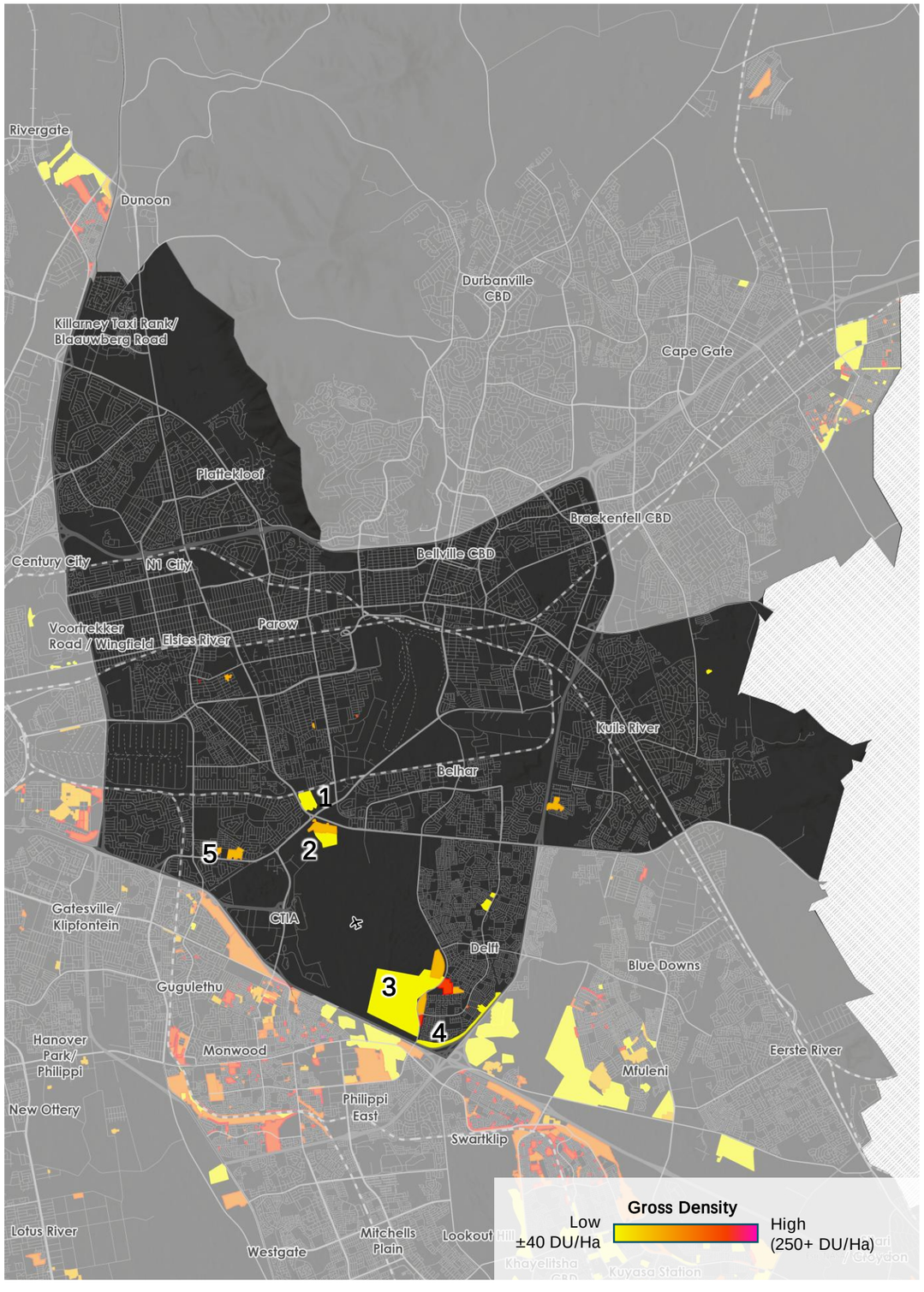
D.2

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)

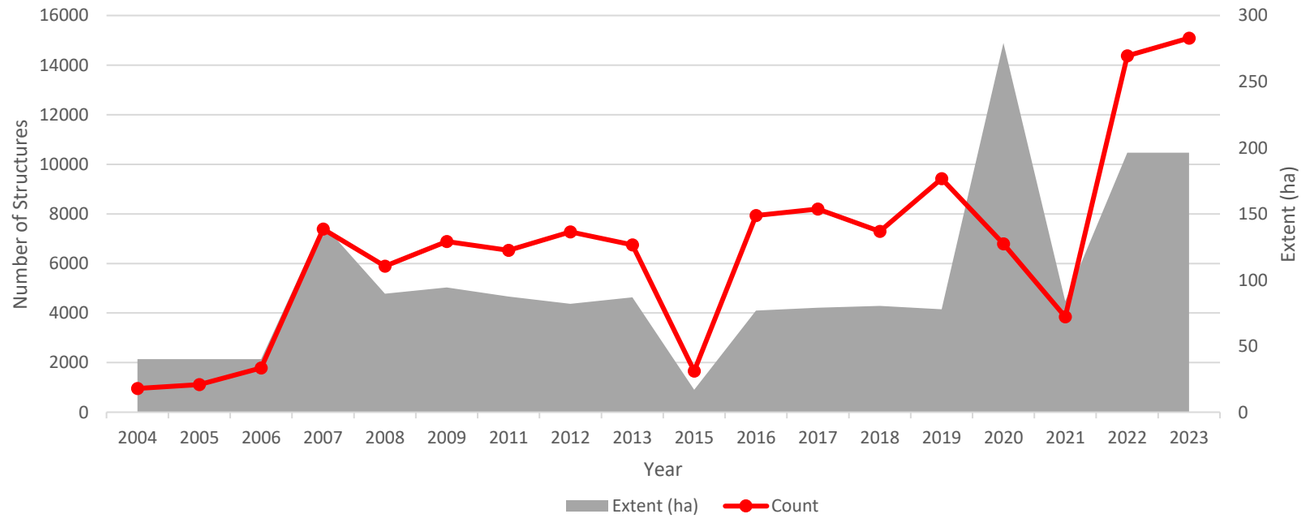
The areas of informality in Tygerberg District mostly occur on land that is not suitable (safe) for residential development such as core biodiversity areas and within noise contours around the Cape Town International Airport, landfill site, wetlands and servitudes. Some of these areas have been identified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

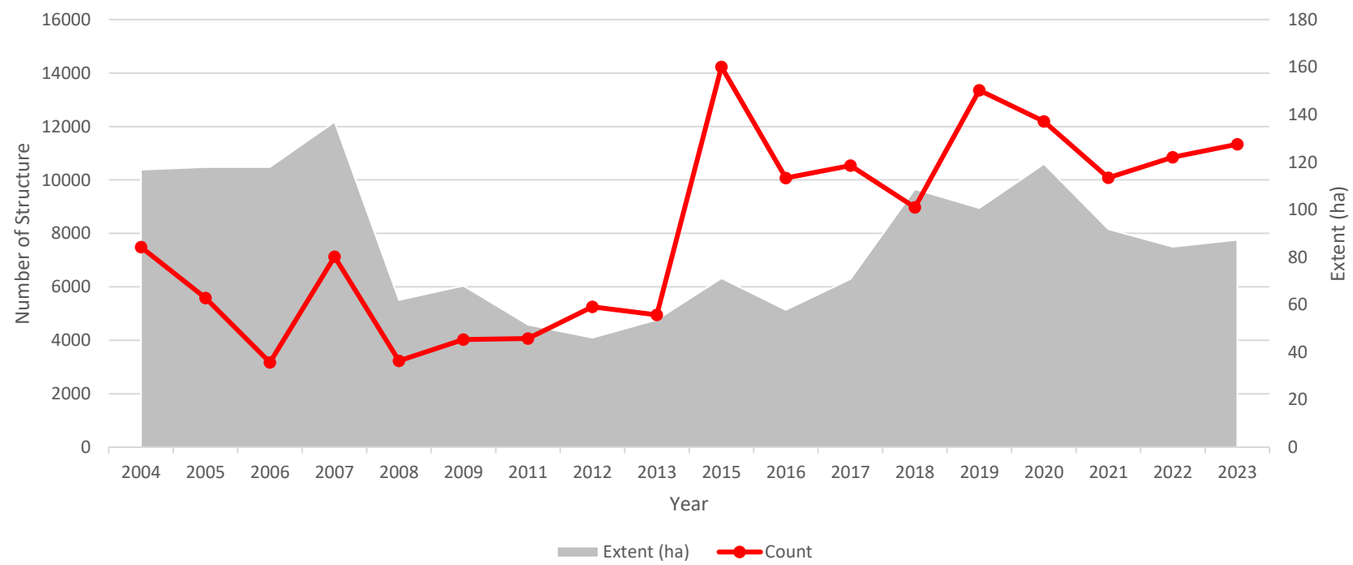
SPATIAL TREND (DISTRIBUTION/PATTERN)

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

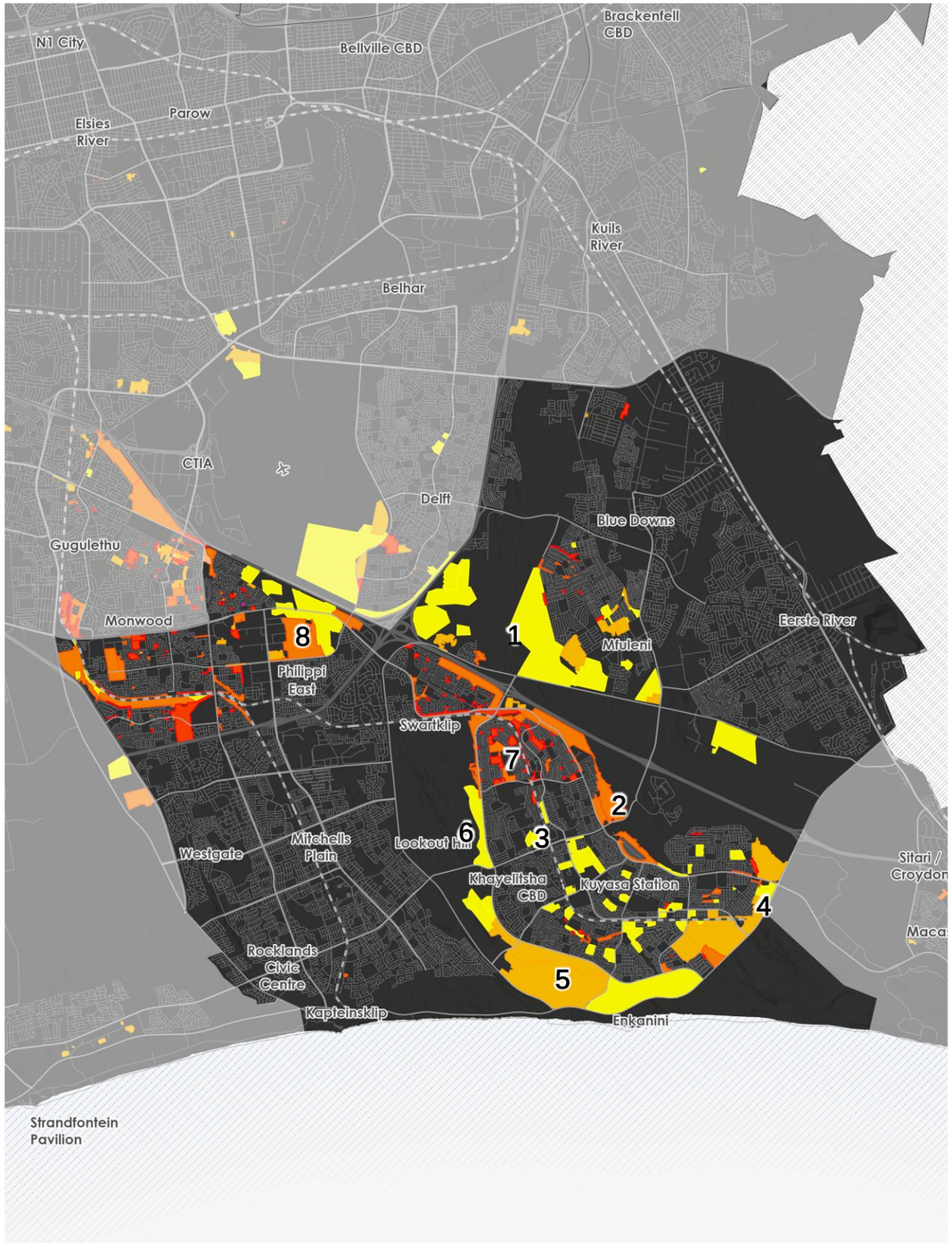
D.2

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).

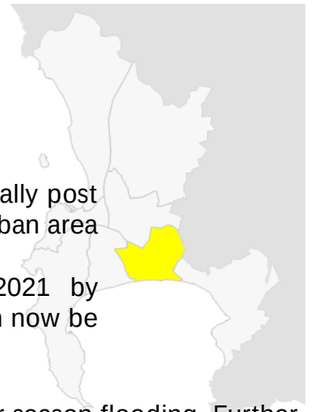
Source: Human Settlements and Urban Planning and Design, City of Cape Town (2002-2023)



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

DISTRICT LEVEL ANALYSIS

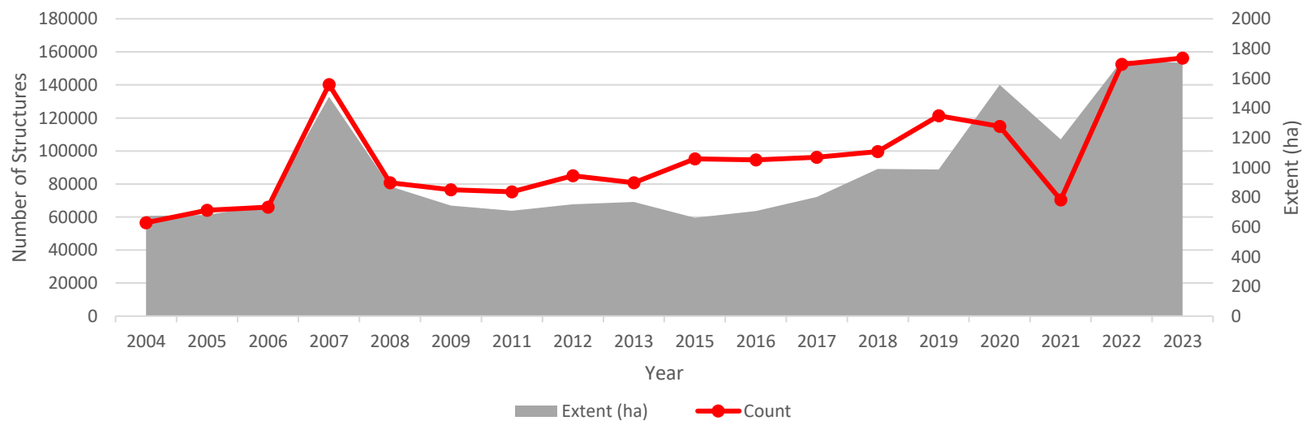
KMPGBD DISTRICT (F)



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

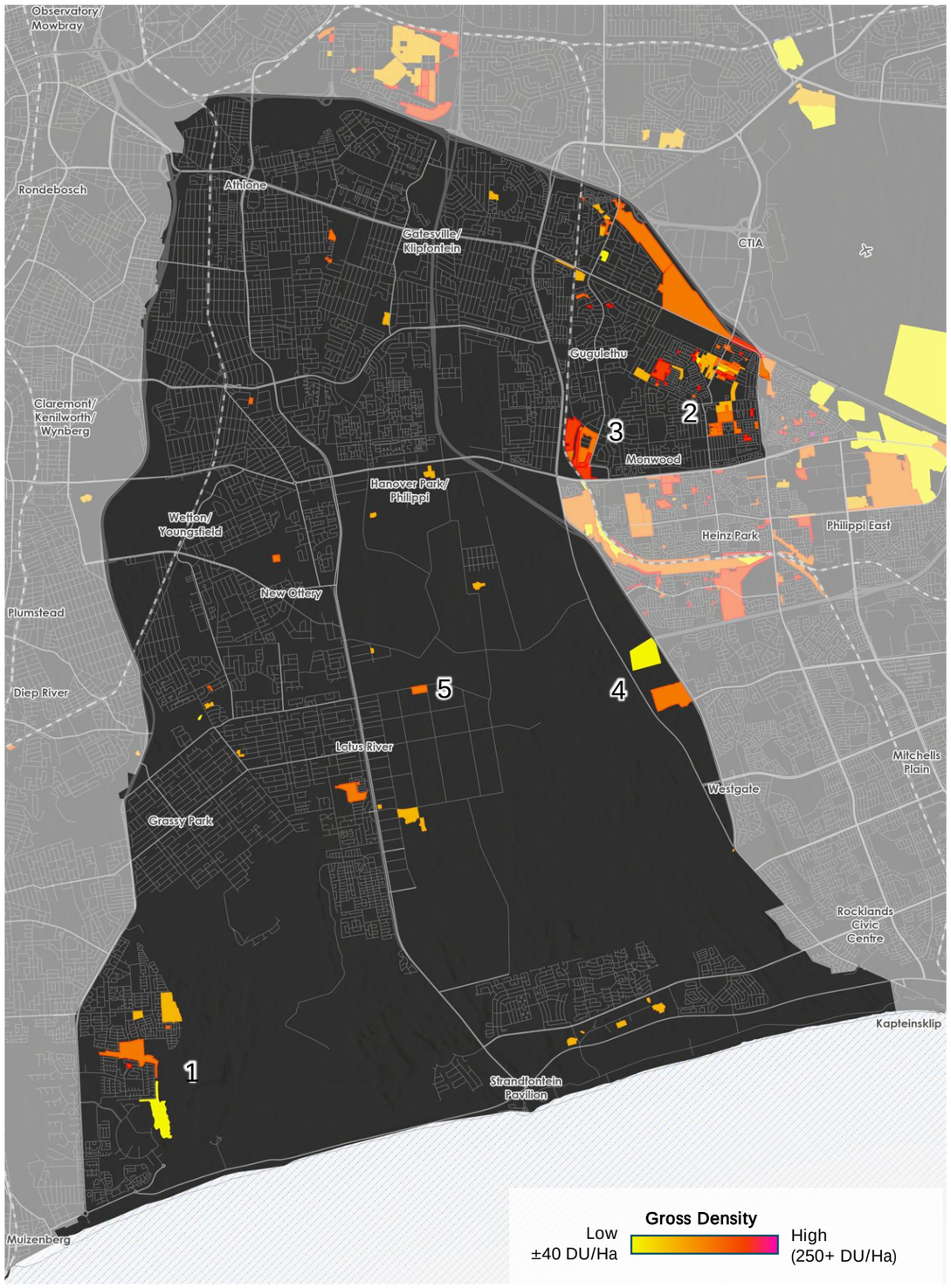
D.2

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)

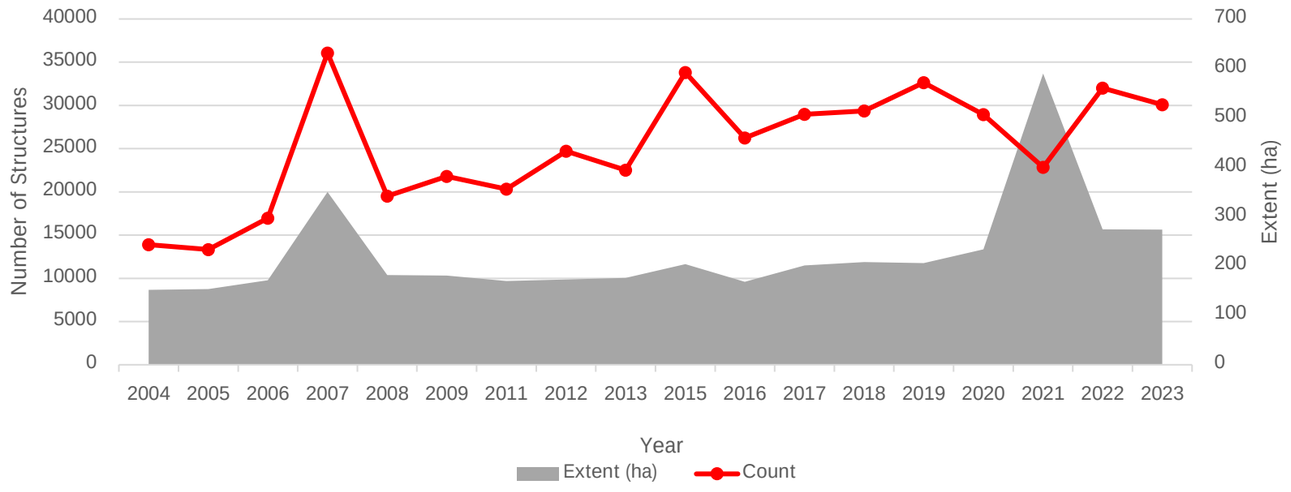
SPATIAL TREND (DISTRIBUTION/PATTERN)

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

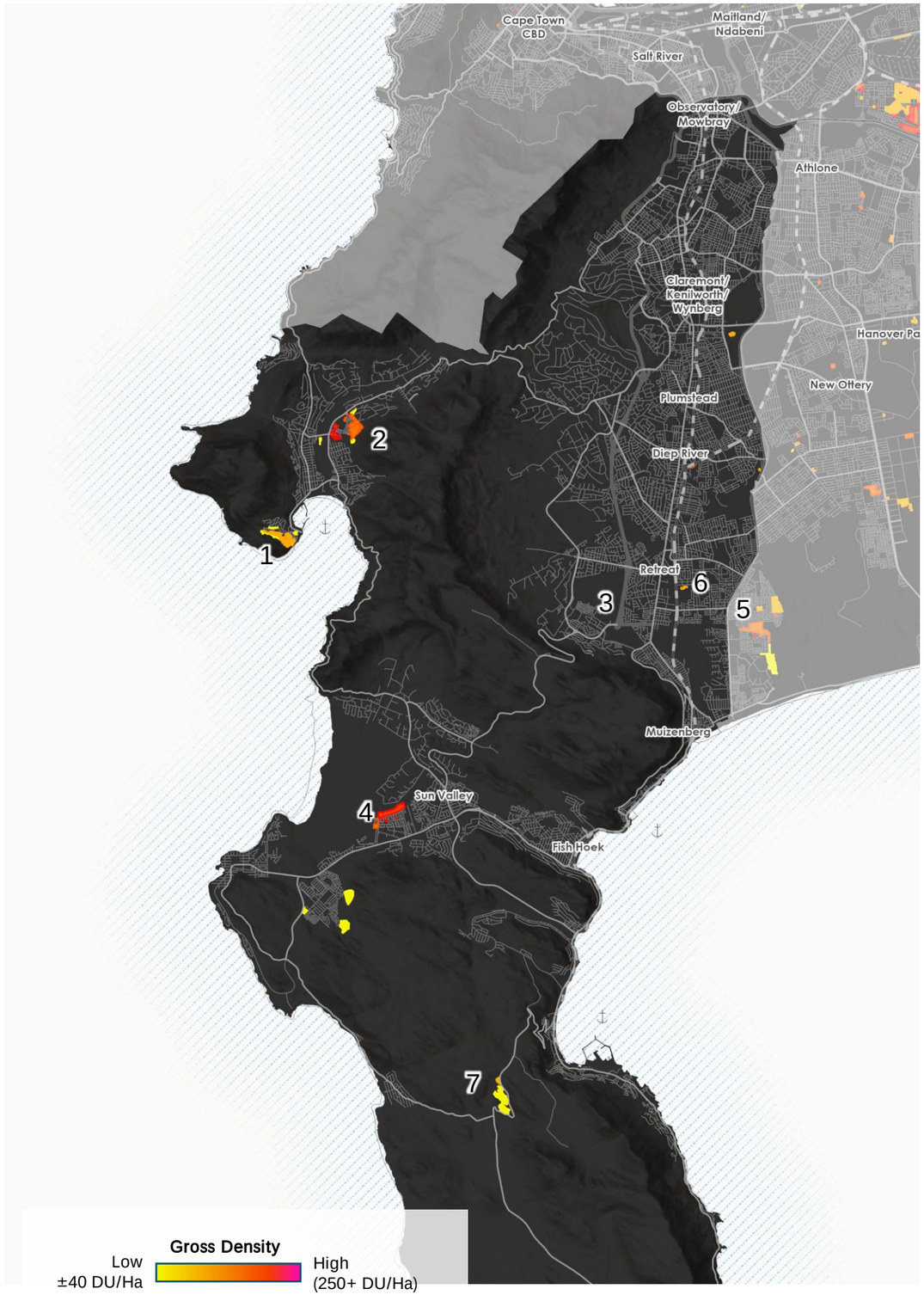
D.2

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)

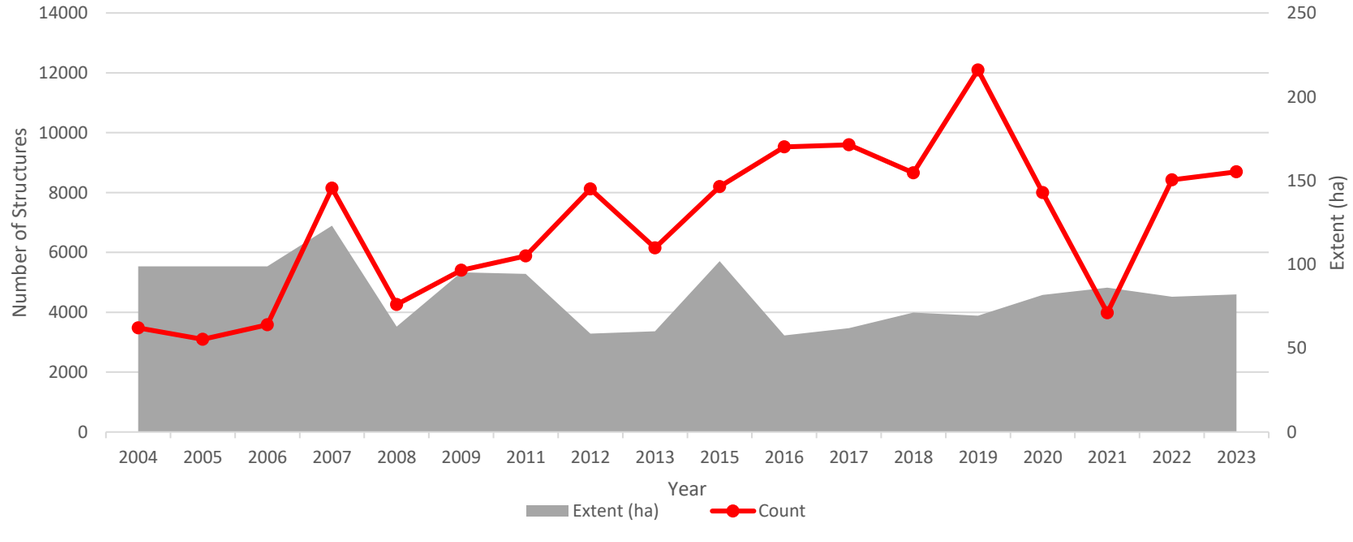
Areas of informality display a spatial pattern of clustering that is either embedded in or in close proximity of areas of lower income, with larger clusters forming along the major transport corridors. Informality has almost exclusively been contained to within the existing informal areas in the Southern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

F1 : Government subsidised housing (2025 Update)
F2 : Capital expenditure / budgets (2025 Update)
F3 : Urban restructuring and upgrading (2025 Update)
F4 : Prioritise LAPIs (2025 Update)

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

F.1

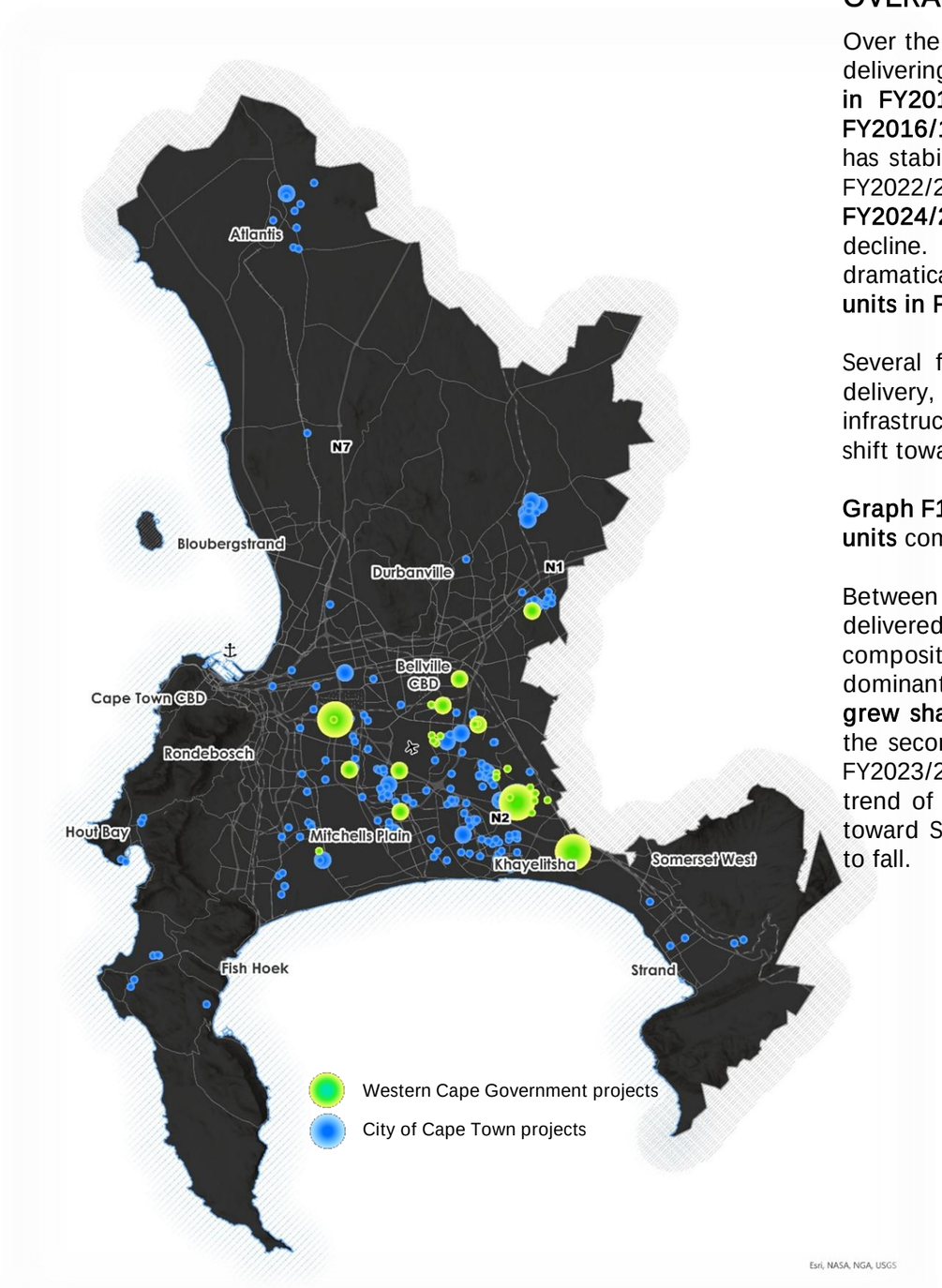
PUBLIC INVESTMENT

GOVERNMENT-SUBSIDISED HOUSING

2025 Update

This Indicator reflects the delivery of government subsidised housing (Completed housing) over a 10 year period, from FY2015/16 - 2024/25, as reported by City of Cape Town and Western Cape Department of Infrastructure: Branch Human Settlements.

Data Source: WCG&CCT Human Settlements Projects (2015/16 -2024/245



Map F1-a: Government-assisted housing completed (2015/16-2024/25)
Source: City of Cape Town and Provincial Departments of Human Settlements

OVERALL TREND

Over the past decade, the City has consistently outperformed the Province in delivering state-subsidised residential units. The City peaked at **11,011 units in FY2017/18**, while the Province's highest delivery was **3,883 units in FY2016/17**. More recently, **from FY2021/22 to FY2023/24**, the City's output has stabilised at around **5,000 units annually** (4,944 in FY2021/22, 4,994 in FY2022/23, and 4,949 in FY2023/24), before declining to **3,538 units in FY2024/25**. In contrast, the Province has experienced a sharp and sustained decline. After delivering **1,301 units in FY2022/23**, its output dropped dramatically **to 369 units in FY2023/24** and remained at a similarly low **366 units in FY2024/25.**

Several factors may have contributed to this downward trend in housing delivery, including reduced funding for subsidised housing grants, infrastructure limitations, delays in title deed transfers, and a strategic policy shift toward prioritising affordable housing delivery mechanisms.

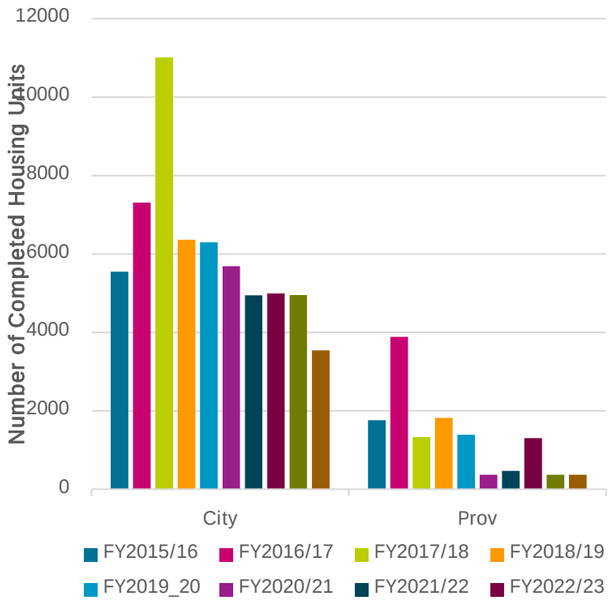
Graph F1-b provides a breakdown of the **proportions and types of subsidy units** completed over the past decade.

Between FY2023/24 and FY2024/25, the total number of housing units delivered in Cape Town declined from **5,318 to 3,904 (a 27% drop**). The composition of delivery, however, shifted significantly. BNG units, while still dominant, **fell from 58% (3,077 units) to 52% (2,046 units)**. **Social housing grew sharply, rising from 13% (671 units) to 34% (1,346 units**), making it the second largest contributor. Meanwhile, UISP units, which had surged in FY2023/24, **declined from 28% to 9%.** These shifts point to a longer term trend of diversification in housing delivery, with a gradual but notable pivot toward Social housing mechanisms, even as total delivery numbers continue to fall.

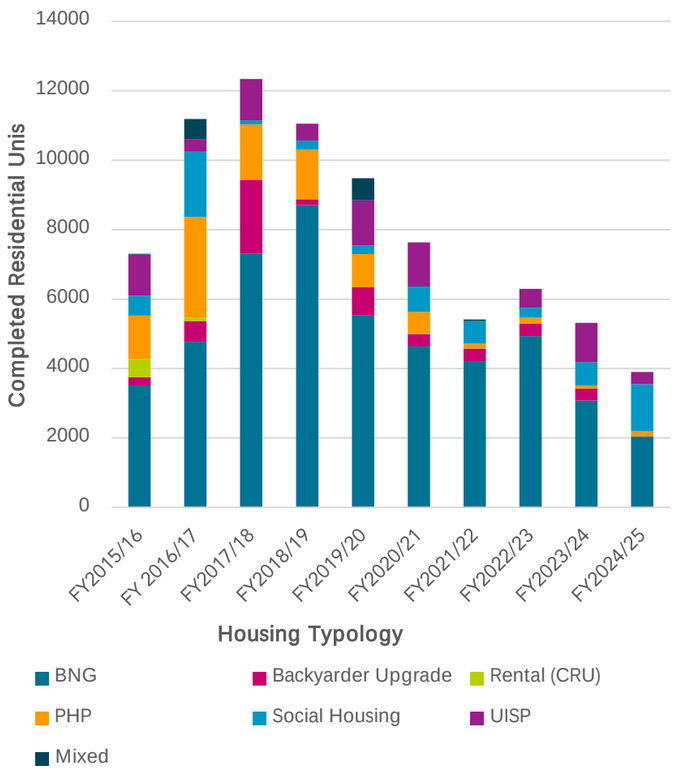
SPATIAL TREND (PATTERN/DISTRIBUTION)

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. 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.

Most projects are concentrated **within Urban Support Areas, as identified in the district spatial plans**, and within **Prioritised Human Settlements Development Areas** such as the Metro South-East Corridor and the Blue Downs Corridor. Provincial initiatives are largely located in Delft, Belhar, and parts of Wallacedene/Bloekombos in the north-east, while the City's major projects are concentrated in Langa, Blue Downs, Mfuleni and Scottsdene/Wallacedene.



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



Graph F1-b: Types of housing opportunities completed

F.1

GOVERNMENT-SUBSIDISED HOUSING

KEY TAKE-AWAY TRENDS

- **Stabilisation, then decline in City delivery:** The City of Cape Town maintained stable delivery around 5,000 units between FY2021/22 and FY2023/24 (4,944 → 4,994 → 4,949). However, output fell sharply in FY2024/25 to 3,538 units, signalling renewed delivery challenges.

- **Persistent decline in Provincial delivery**: The Western Cape Government's output dropped from 1,301 units in FY2022/23 to just 369 units in FY2023/24, and remained low at 366 units in FY2024/25, highlighting significant constraints.

- **Shifts in delivery profile**: BNG houses remain the largest share of the portfolio (both historically and in the 2021–2025 period), but their dominance has gradually reduced as affordable housing and UISP delivery gain traction.

- Geographically, government-subsidised residential opportunities continue to be concentrated in high-density areas, particularly within **Urban Support Areas and Prioritised Human Settlements Development Areas identified in the District Plans.**

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

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

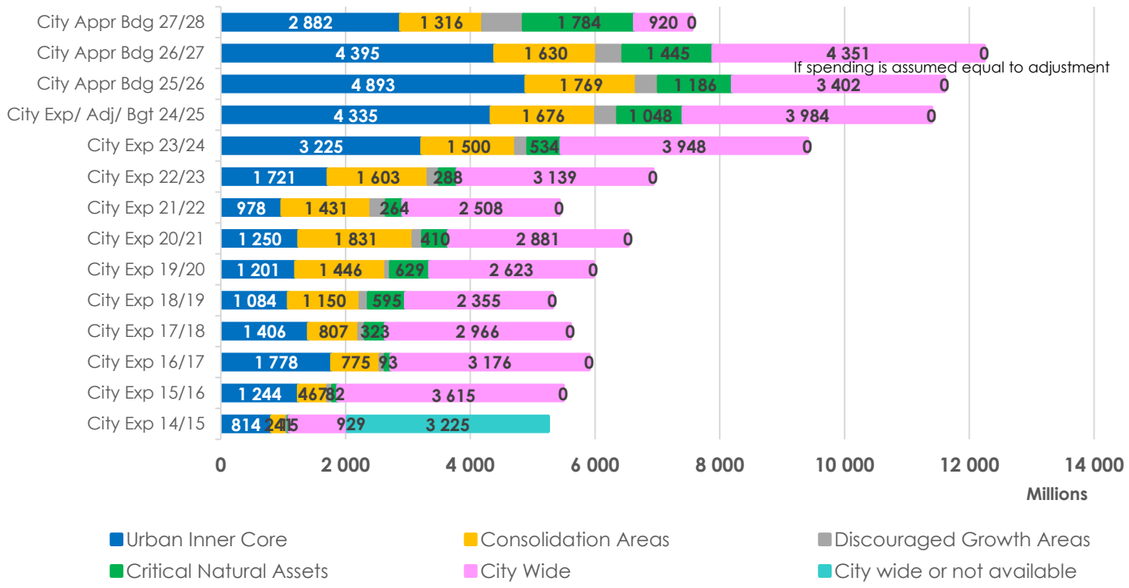
F.2

PUBLIC INVESTMENT

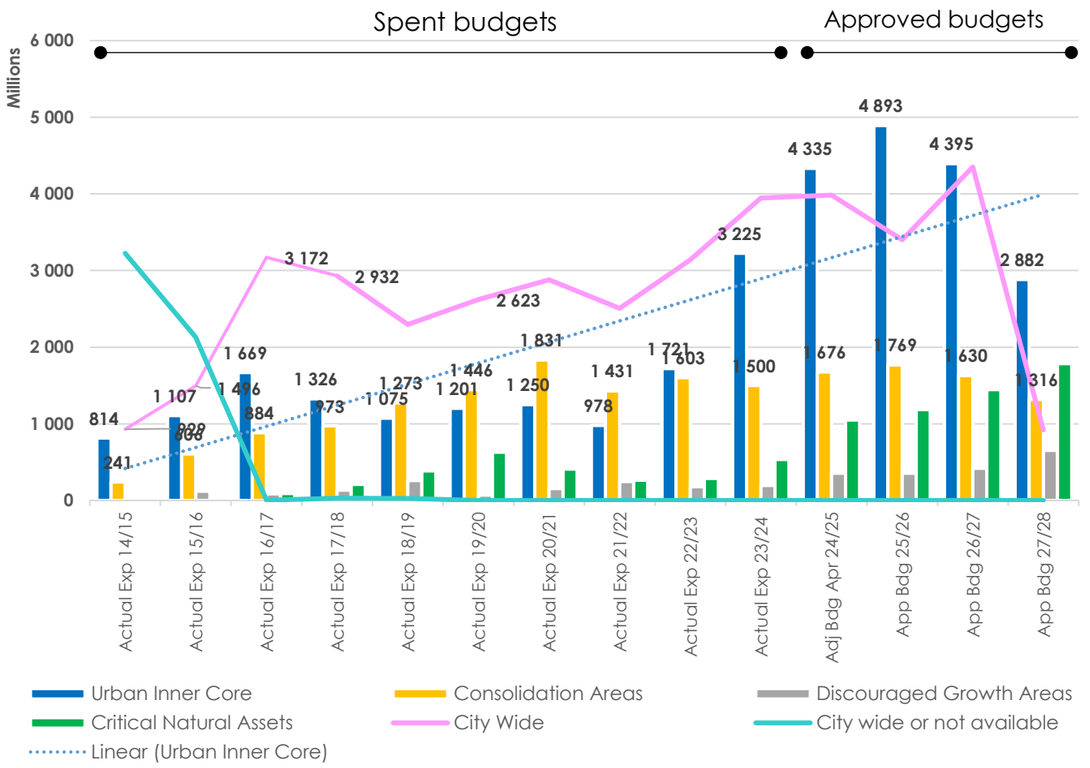
CAPITAL EXPENDITURE: CITY PROJECTS

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). Only City of Cape Town projects > R10m are reflected on maps.

Source: City of Cape Town Finance Dept (June 2025)



Graph F2-a: City of Cape Town capital expenditure 2014/15-2024/25 (as at Jun 25) per MSDF Spatial Transformation Area (2024/25 estimated as equal to budget)



Graph F2-b: City Capital expenditure 2014/15-23/24 and approved budgets 2024/25-27/28 (as at Jun 25)

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 significant increase in the expenditure on capital projects from around R5b in 2014/15 to over R12b in 2026/27-27/28 (graph F2-a). It is estimated that expenditure will increase to just over R12b in Jun 2027

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&b), but the UIC is exceeding those in 2025/26 implying spatial policy realisation. Citywide includes 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 were growing from just over R1b in 2014/15 to an estimated fourfold total of R4,4b in 2026/27

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 almost R5b in 2025/26. Coupled with the CA, the investment of approximately R7b 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 CNA were not clearly visible in 2014/15, but is estimated to significantly increase to approximately R1.4-1.7b in the current financial year (graph F2-a).

SPATIAL TREND (DISTRIBUTION/ PATTERN)

Projects located in the UIC and the CA 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, intensification and diversification of land uses along transport corridors. There is a constant increase in the overall spending and budgeting for the UCI (graph F2-b) - the area of highest anticipated residential densification over the next 10-25 years. However, the recent approval of the incremental densification referred to a affordable rental flats, should still be filtered into long term infrastructure planning.

The budget increase in the UIC and the CA can be ascribed to the investment in large bulk engineering services improvements such as the wastewater treatment works and bulk water regional distribution pipelines - located or targeted to serve the existing urban areas or those earmarked for increased densification. 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 citywide.

GENERAL ANALYSIS

Graph F2-b shows a step change increase in recent and anticipated capital expenditure in the UIC from 2023/24 onwards, more so than in the CA. 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 UIC trend line reflecting spent capital and anticipated spending in the UIC (with approved budgets for 2024/25 onwards), is substantially steeper from 2023/24 than historically. 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 2025/26 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). 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 (June 2025)

OVERALL TREND

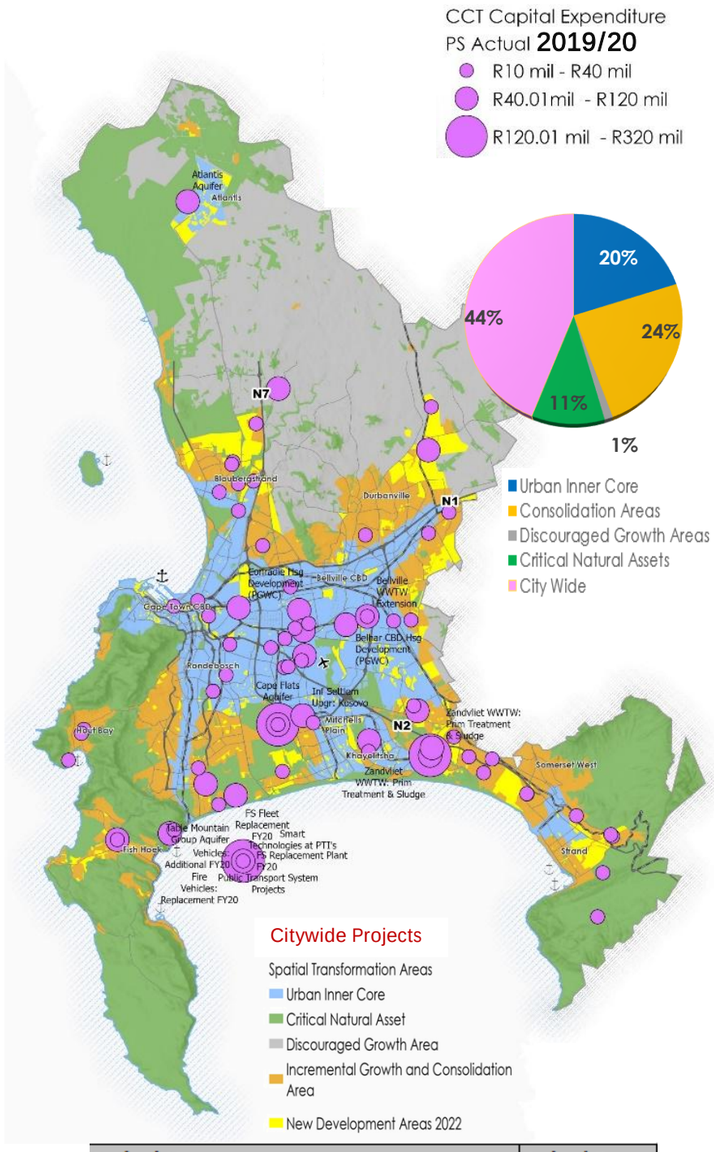
The expenditure on capital projects located in or beneficial to the UIC has steadily decreased and is averaging around 22% of the value of the total annual capital expenditure since 2015/16. The latest completed year (2024/25) appears to be on the rise again and this is a true reflection of the spatial targeting focus on the UIC large infrastructure projects like water water treatment works and the IRT h 2A.

The investment in projects located in or benefiting the CA has reached a high of about 23-24% (in 2019/20 and 2022/23) of the annual expenditure. Due to the large investments in the UIC, the 2024/25 CA is notably smaller.

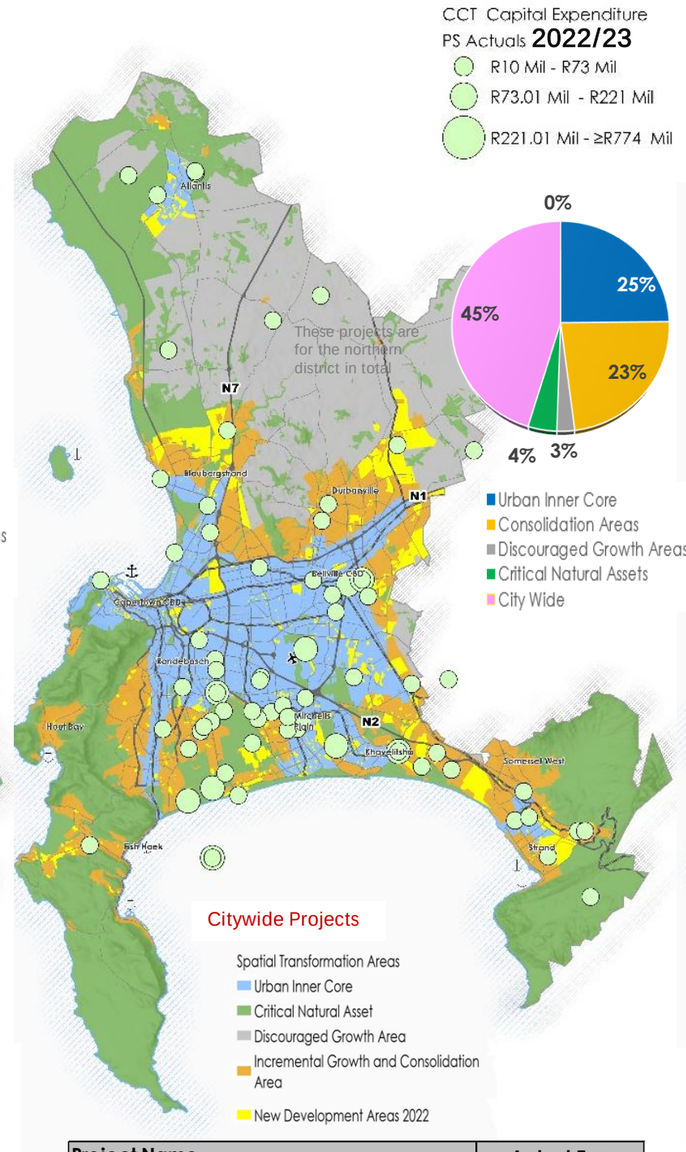
Expenditure on projects benefiting the whole municipal area, and categorised as citywide has more or less remained at about 44-45% for quite a few years. The latest, 2024/25 expenditure is much higher in well-known locations in the UIC and hence lower on citywide projects.

In almost all cases during the past eight financial years, the 10 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.

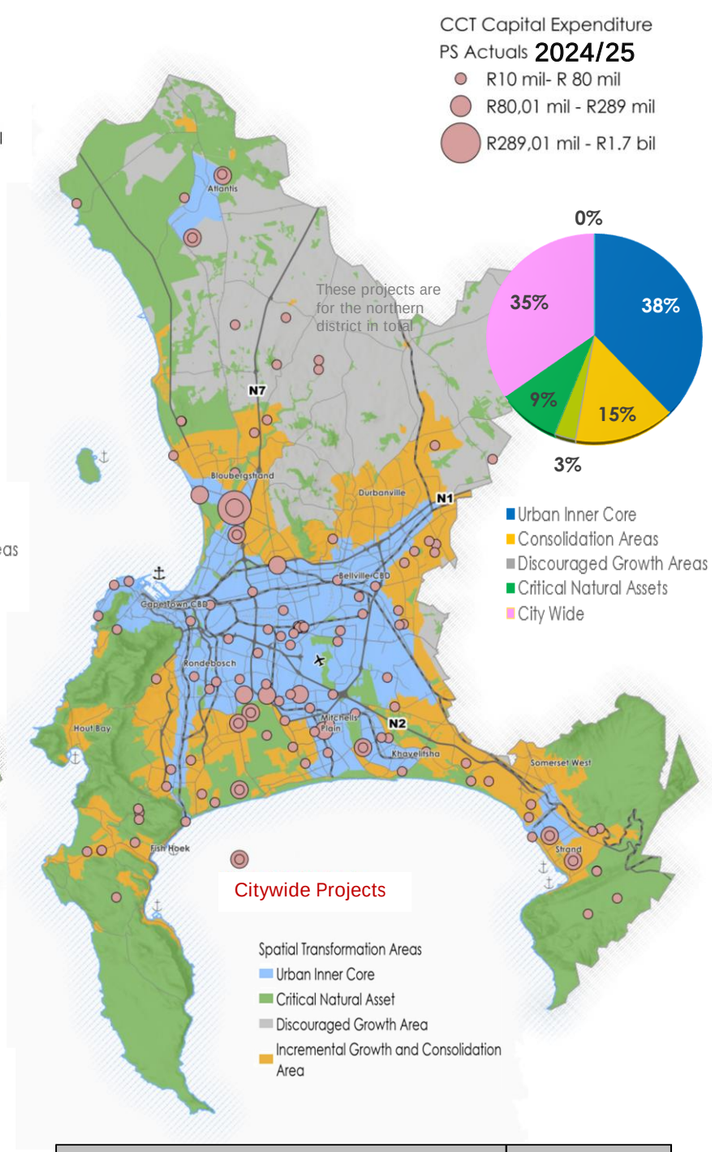
More recently, the engineering network projects such as WWTW upgrades dominated the human settlement projects in the top 10 per year. Since 2019/20, WWTW upgrade projects were the most costly single expenditure item – with the exception of the most recent year when the Rapid Bus Transport Road investment, significantly increase.



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
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	Actual Exp
Potsdam WWTW - Extension	1 075 370 000
Replace Sewer Network (Citywide) FY25	288 485 334
Replace Water Network (City Wide) FY25	220 194 973
Potsdam WWTW - Extension	211 617 256
IRT Phase 2A: Project Management	189 129 000
Ground Mounted PV	184 109 170
Property Acq: Joint Policing Centre	161 000 000
Wesfleur Aeration & Blower Replacement	157 019 363
Repl & Upgr Sew Pump Station FY25	147 612 304
IRT Ph2A:W4-Roadway-Govan Mbeki	145 683 627

Map Series F2-c: City capital expenditure 2019/20, 2022/23 and 2024/25

F.2

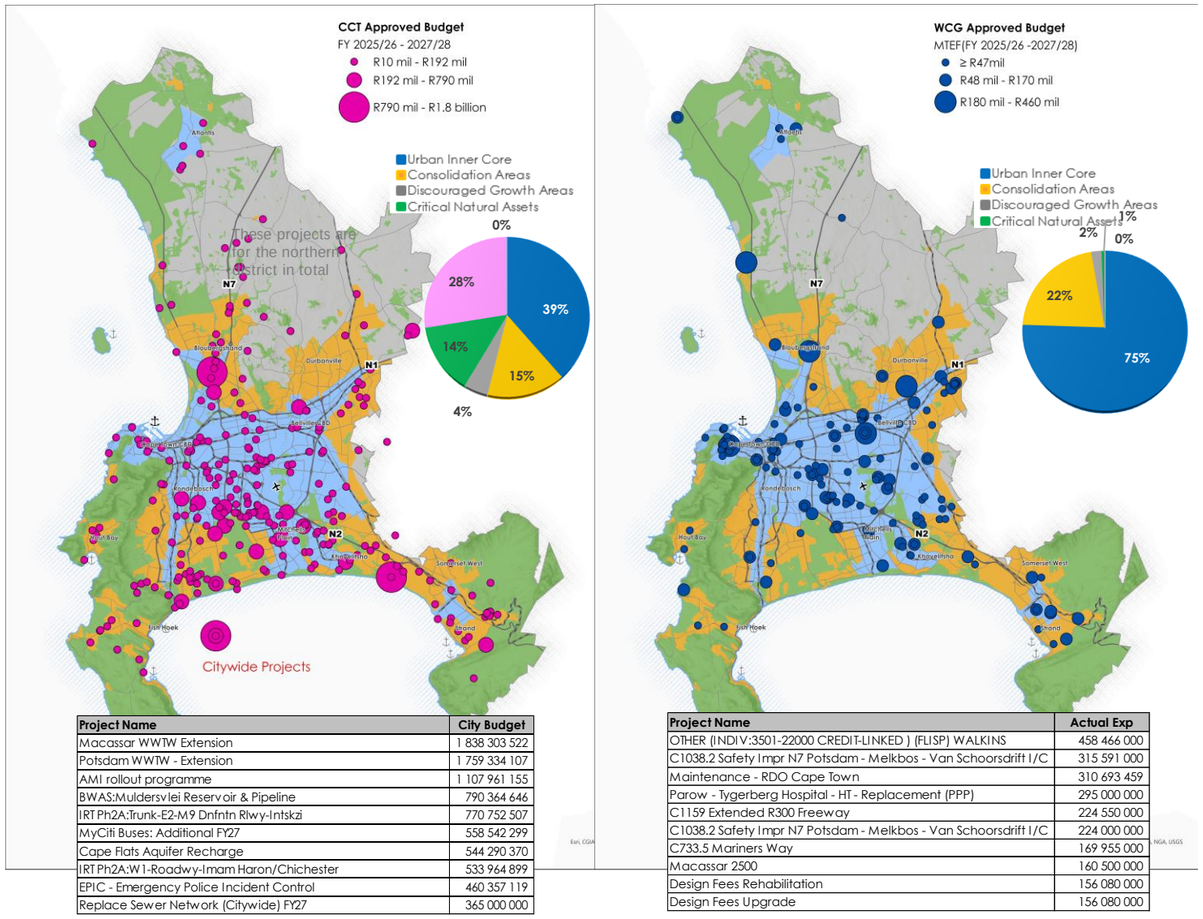
PUBLIC INVESTMENT: CITY & PROVINCIAL GOVERNMENT

CAPITAL BUDGET: CITY & PROVINCIAL PROJECTS

2025 Update

This indicator shows the location of annual completed capital projects 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).

Source: City of Cape Town and Western Cape Gov Finance Dept (June 2025)



Project Name	City Budget
Macassar WWTW Extension	1 838 303 522
Potsdam WWTW - Extension	1 759 334 107
AMI rollout programme	1 107 961 155
BWAS:Muldersvlei Reservoir & Pipeline	790 364 646
IRT Ph2A:Trunk-E2-M9 Dnfntn Rlwy-Intskzi	770 752 507
MyCiti Buses: Additional FY27	558 542 299
Cape Flats Aquifer Recharge	544 290 370
IRT Ph2A:W1-Roadwy-Imam Haron/Chichester	533 964 899
EPIC - Emergency Police Incident Control	460 357 119
Replace Sewer Network (Citywide) FY27	365 000 000

Map F2-b: City capital budget 2025/26-2027/28

Project Name	Actual Exp
OTHER (INDIV:3501-22000 CREDIT-LINKED) (FLISP) WALKINS	458 466 000
C1038.2 Safety Impr N7 Potsdam - Melkbos - Van Schoorsdrift I/C	315 591 000
Maintenance - RDO Cape Town	310 693 459
Parow - Tygerberg Hospital - HT - Replacement (PPP)	295 000 000
C1159 Extended R300 Freeway	224 550 000
C1038.2 Safety Impr N7 Potsdam - Melkbos - Van Schoorsdrift I/C	224 000 000
C733.5 Mariners Way	169 955 000
Macassar 2500	160 500 000
Design Fees Rehabilitation	156 080 000
Design Fees Upgrade	156 080 000

Map F2-c: Province capital budget 2025/26-2027/28

OVERALL TREND

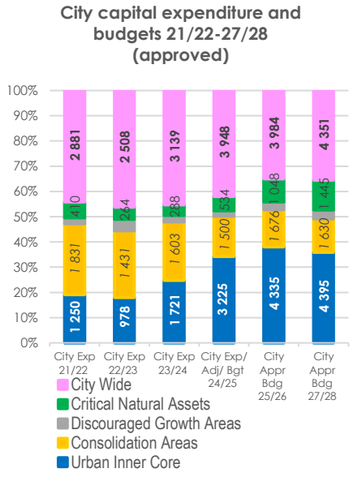
Anticipated and approved budgets for capital projects are an illustration of intended investment by role players such as the City as local authority and the Provincial Government of the Western Cape. These budgets reflect that government's intended capital project locations align with the spatially targeted areas of the City's MSDF (STAs). Approved investment by the local and provincial government over the medium term (2021/22-2027/28), is increasing (see graph F2-e) with the City spending four times more in the metropolitan area than Province.

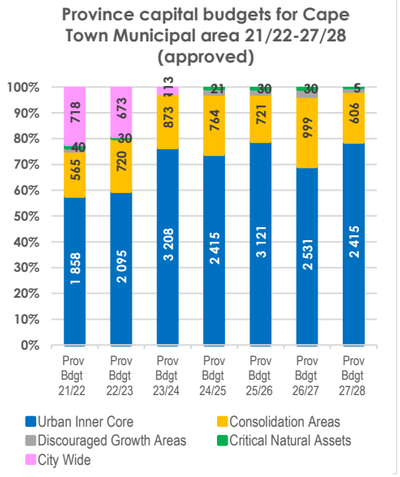
For the City, the overall budget is increasing from around R6b in 2021/22 to R12b in 2027/28, while the provincial budget remains on about R3b (see graph F2-e). Although the provincial budget earmarked for the City of Cape Town areas was between 59% (2021/22), it is decreasing to around 25% (2027/28) of the City's own budget within the context of the City's massive expansion in infrastructure (R6b-R12b). The proportion intended to be spent by the Province in the UIC and CAs, is more than the City's (graph F2-c vs graph F2-d, City 54% vs Province 97% 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 CA and the DGA, but outside the existing built-up footprint.





Graph F2-c: City capital budgets 2021/22-2027/28

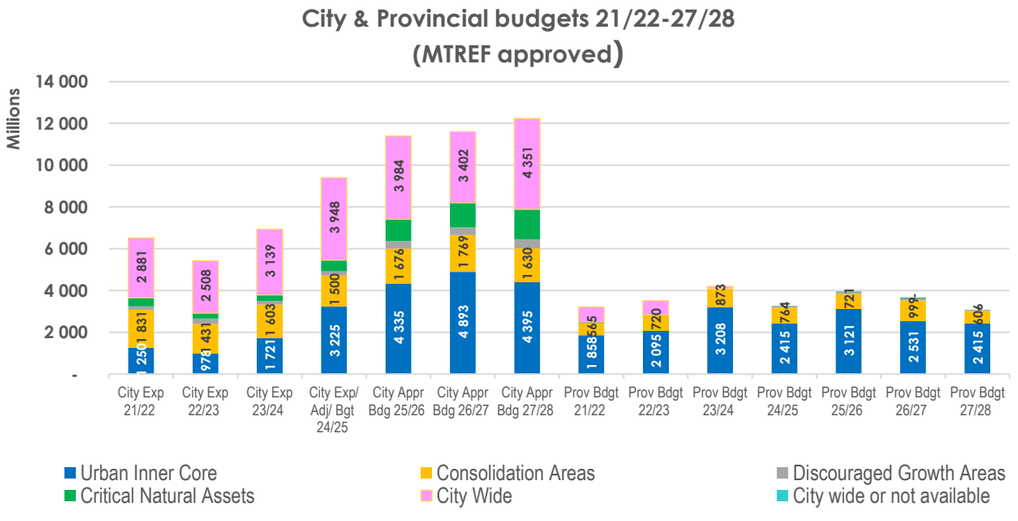
Graph F2-d: Province capital budgets 2021/22-2027/28

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, CA and even the CNAs (see graphs F2-c and F2-e). Projects located in the UIC and the CAs 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), Tygerberg hospital and Macassar human settlement project, as well as funding of houses under the FLISP programme. Around 40% of the capital budgets of the City is always depicted as citywide (graph F2-e) which implies the project benefits are distributed across the whole municipal area and cannot be ascribed to only the UIC, CAs or the CNA.

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). Especially the City has a number of projects that are of citywide 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 2021/22-2027/28

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 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 (CNA) areas.

- The City's budget was always about 1.5 times larger than the provincial budget to be spend in Cape Town (in 2021/22), but the outer years have increased to **four times larger** than the provincial budget for the municipal area.

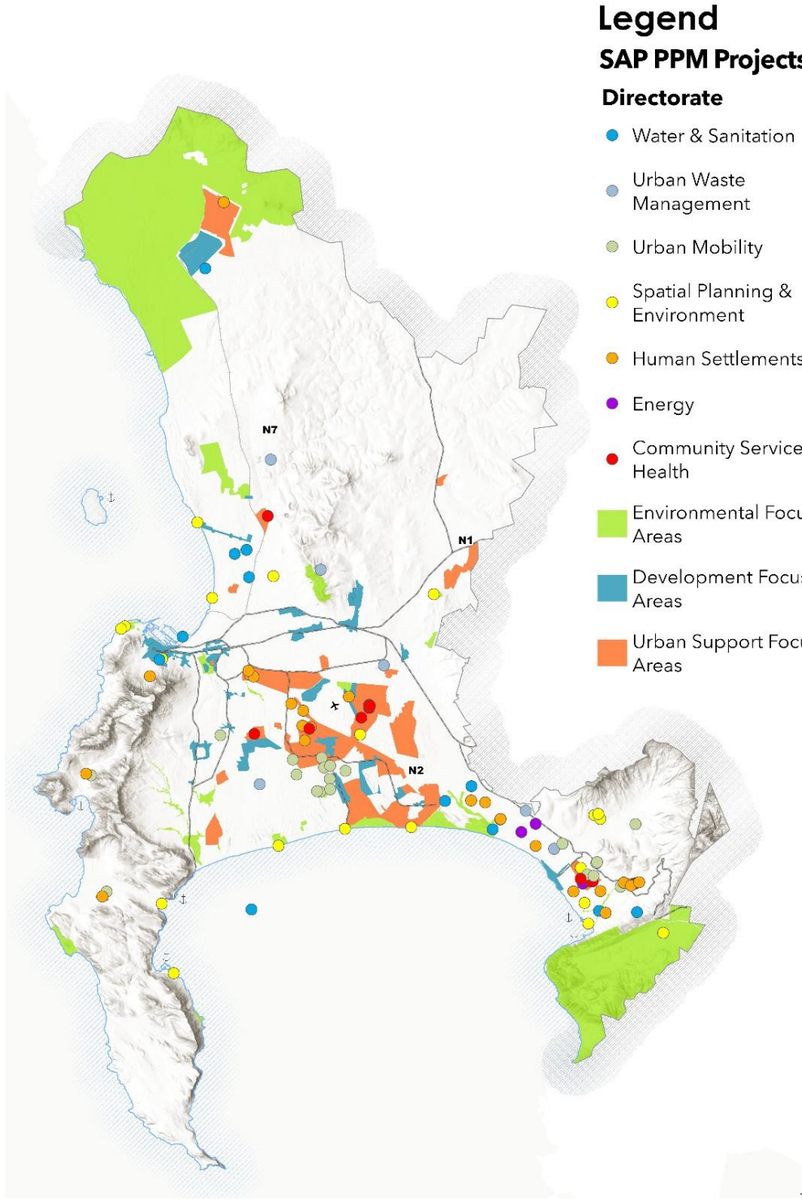
F.3

PUBLIC INVESTMENT

PROGRESS: URBAN AND RESTRUCTURING AND UPGRADING PROJECTS

2025 Update

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 2025; District Plan Vol. 3 2023*



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

PLFA	Count	Percentage
Development Focus Area (DFA)	23	10.1%
Environmental Focus Area (EFA)	17	7.5%
Urban Support Focus Area(USFA)	44	19.3%
Outside	92	40.4%
No Location	28	12.3%
Missing information	24	10.5%

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

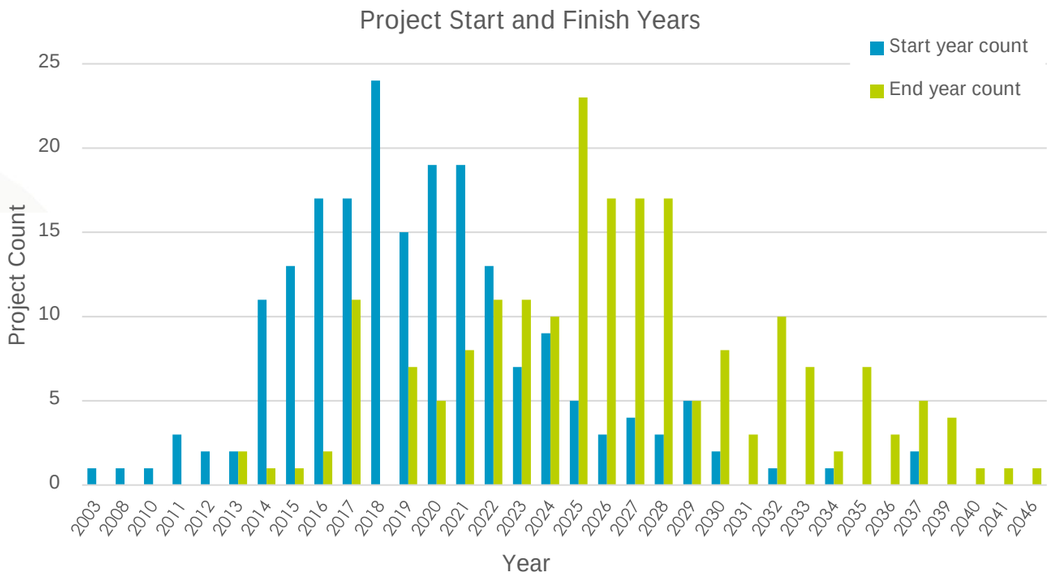
OVERVIEW

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 246 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 2046.
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 28% of projects are within the project preparation phase (between scoping and conceptual design), 2.5% of projects are in screening, and 64.7% of projects are within the project execution phase (between detailed design and benefits review). In 2026, 3 new projects are anticipated to start, while 17 projects are expected to be completed. Spatial Planning and Environment, Urban Mobility, Water and Sanitation 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 and Urban Mobility directorates. There are 24 projects proposed by the DSDF that have not been aligned to CPX numbers.



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

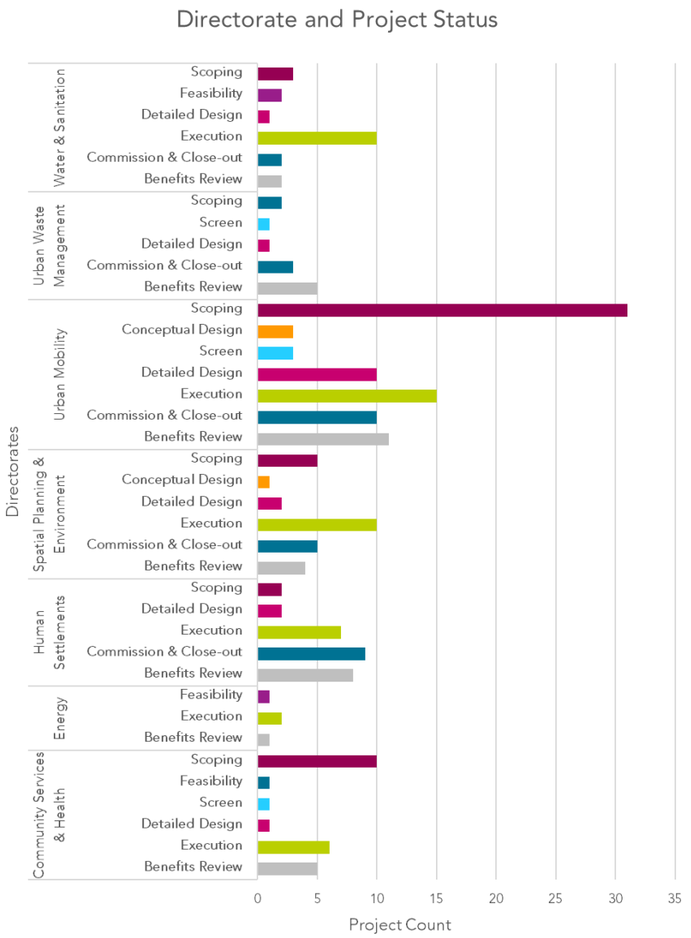


Figure F3-a: Bar chart showing capital investment prioritisation projects per sector and status

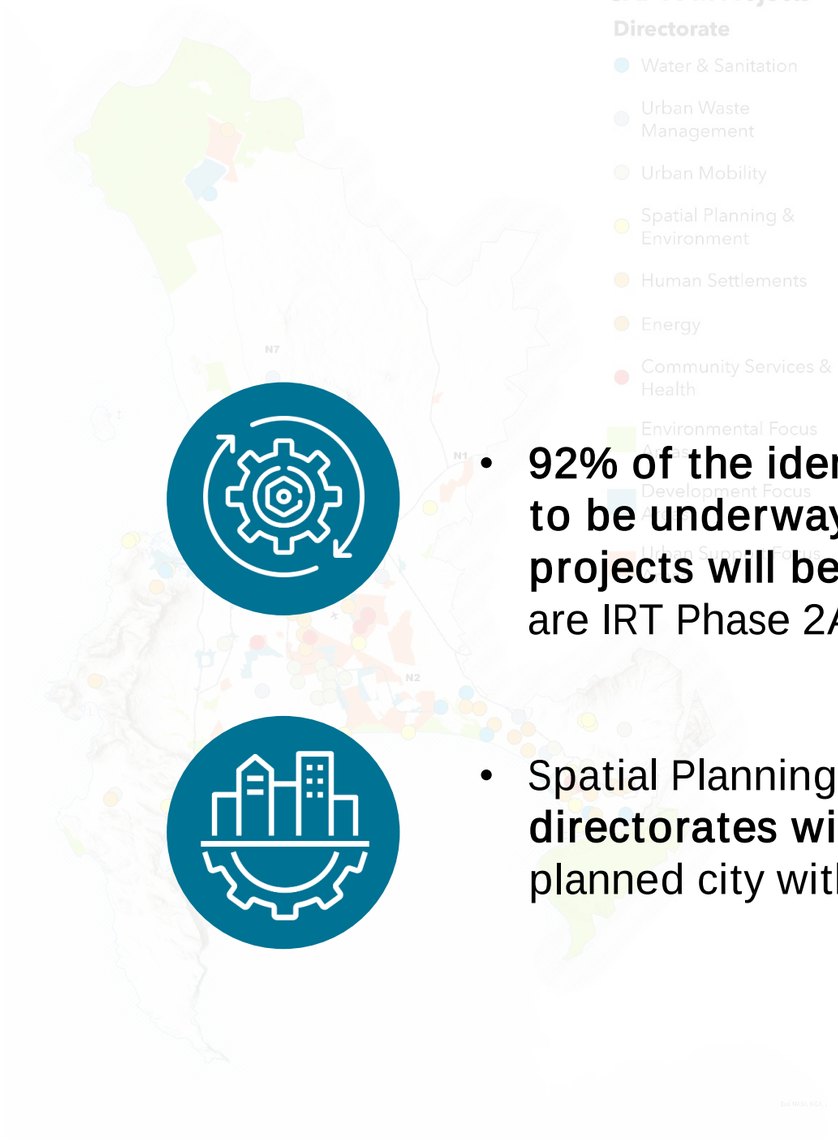
Current Status	Status	Percentage
Scoping	53	26%
Feasibility	4	2%
Conceptual Design	4	2%
Screen	5	2.5%
Detailed Design	17	8.3%
Execution	50	24.5%
Commission & Close-out	29	14.2%
Benefits Review	36	17.6%
Missing Information	24	11.8%

Table F3-b: Current status and project count

F.3

PROGRESS: URBAN AND RESTRUCTURING AND UPGRADING PROJECTS

KEY TAKE-AWAY TRENDS



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

- **92% of the identified urban restructuring and upgrading projects are expected to be underway by the end of 2025, while by 2030 over 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.

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

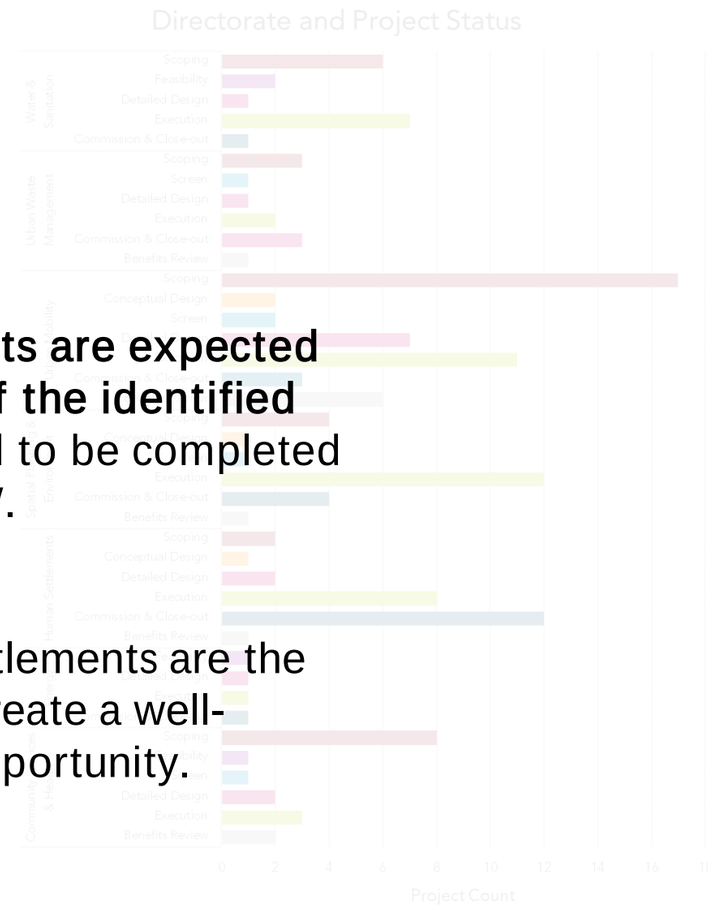


Figure F3-a: Bar chart showing capital investment prioritisation projects per sector and status

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%

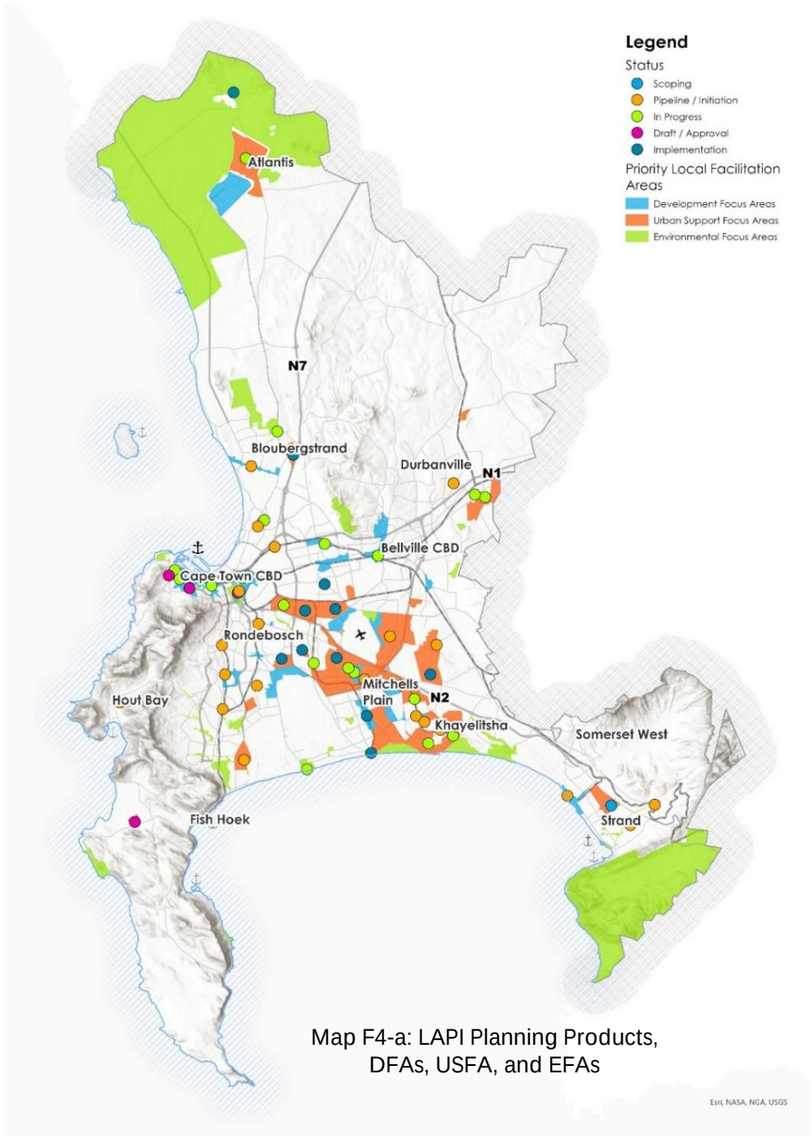
Table F3-b: Current status and project count

PUBLIC INVESTMENT

PROGRESS: PRIORITISED LAPIs

This indicator monitors the progress of developing Local Area Planning Initiatives (LAPIs) as 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 (Map F4-a). LAPIs typically provide a greater level of planning direction in strategic locations and have a stronger focus on implementation than higher level spatial development frameworks.

The DSDF assisted with identifying Priority Local Facilitation Areas (PLFAs), which provide a district/local level basis for spatial prioritisation. The PLFAs aim to guide implementation through; directing a.) public investment, b.) incentives, c.) budgets and d.) planning focus for the short to medium term. The PLFAs consist of Development Focus Areas (DFAs), Urban Support Focus Areas (USFAs) and Environmental Focus Areas (EFAs) (Map F4-a). A total of 59 new LAPIs were identified and prioritised for investigation in the district plans based on their location within a PLFA.

The current status of each LAPI is outlined in Figure F4-a. Table Bay has the largest number of active projects; three projects in progress and one in scoping phase. The districts of KMPGBD, Helderberg and Blaauwberg each have one project in progress and one in pipeline/initiation. Northern and Cape Flats have one project in progress.

Overall 24 projects have been approved/ adopted and are now in implementation phase. LSDFs approved in the last year include Woodstock Salt River and Blaauwberg Road.

In the last year, several planned LAPIs have been de-prioritised or withdrawn. Many of which were owed to the shift of priorities from external departments as well as a re-evaluation of LAPI requirements.

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

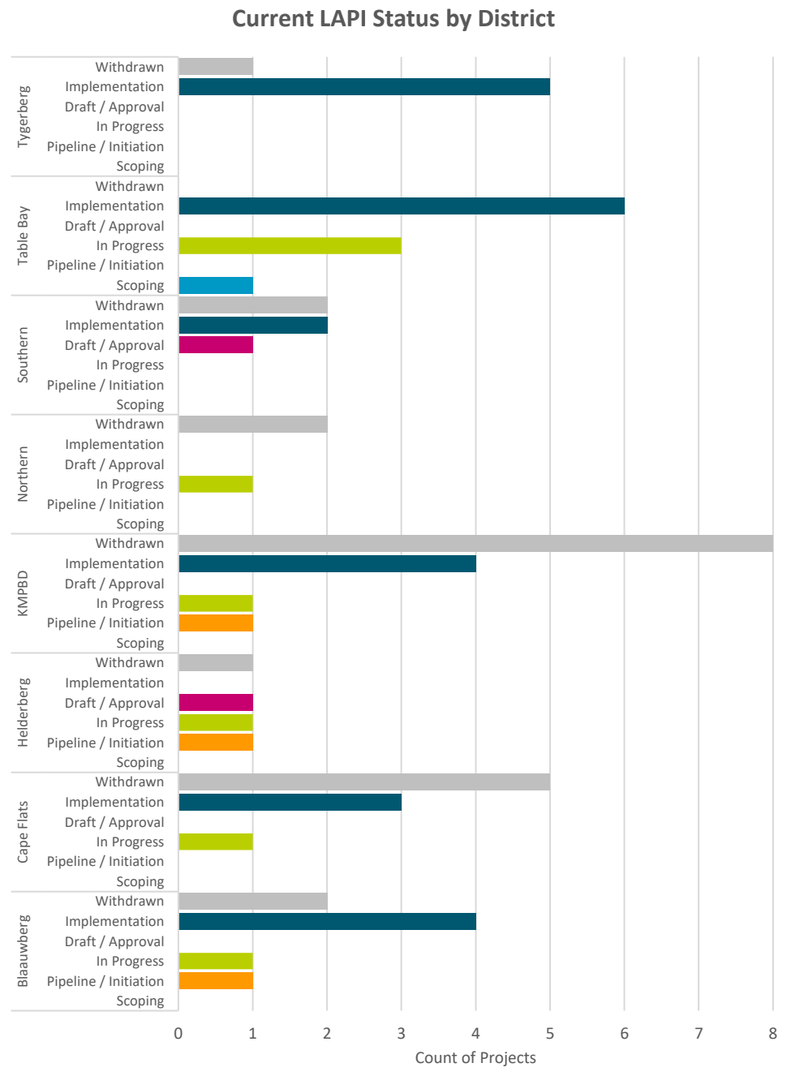
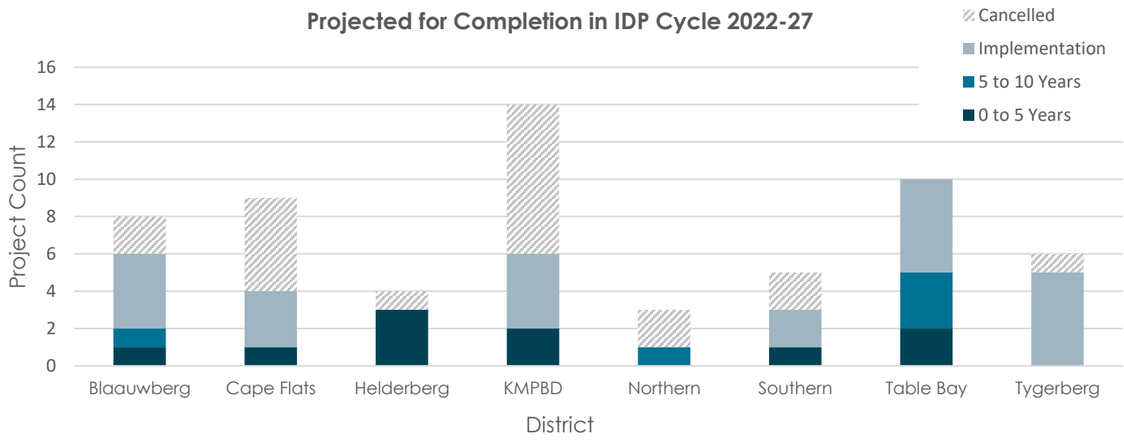


Figure F4-a: Bar chart showing the status of each project per district

Planning Product Status	Definition	23/24	24/25	25/26
Scoping	Determining whether LAPI is required / appropriate.	2	2	1
Pipeline / Initiation	LAPI planned to commence shortly. (Obtaining approvals, resources, budget)	22	24	3
In Progress	LAPI currently underway. *(Investigations, drafting, public engagement)*	20	15	8
Draft / Approval	LAPI Product is complete and ready for final approval / adoption.	4	2	2
Implementation	LAPI Product has been approved / adopted.	11	17	24
Withdrawn	LAPI Product has been cancelled / not prioritised.	-	-	21

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

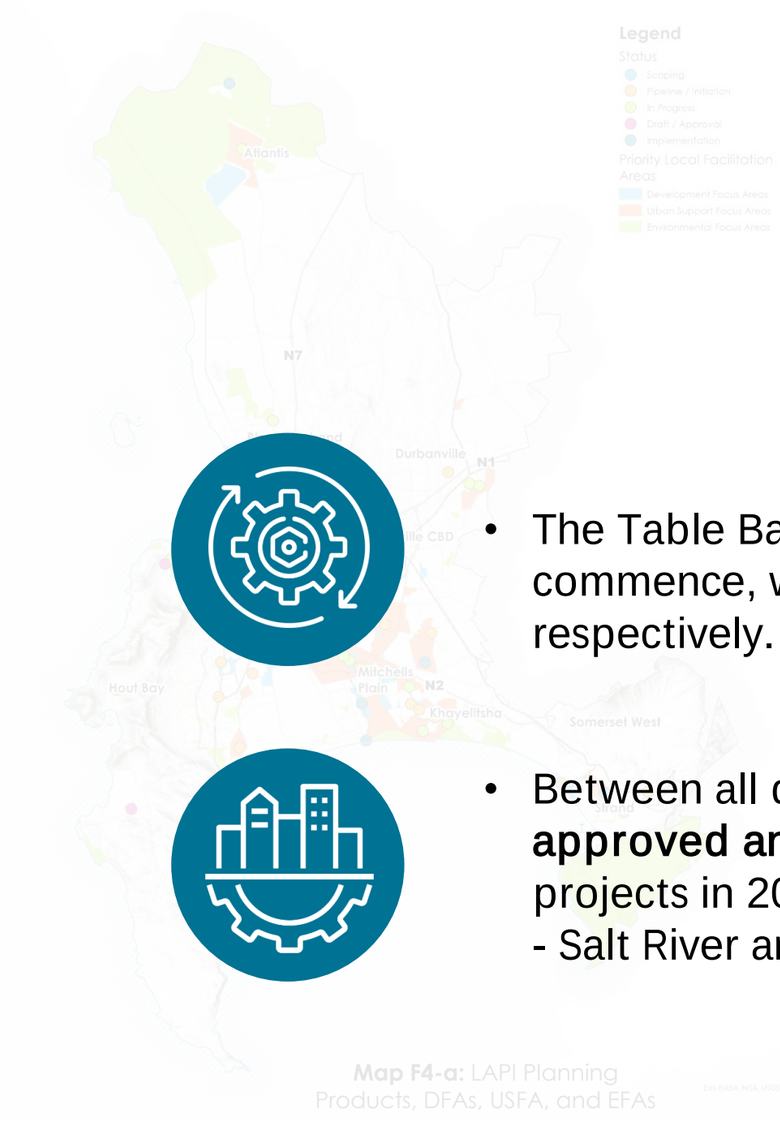


Graph F4-a: Projection of projects for completion in the IDP cycle ranging from 2022 to 2027

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 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. [illegible] and one in pipeline/initiation phase. Across all districts two projects are in draft/approval phase. The Woodstock - Salt River LSDF, Bo-Kaap LSDF, Somelele 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.

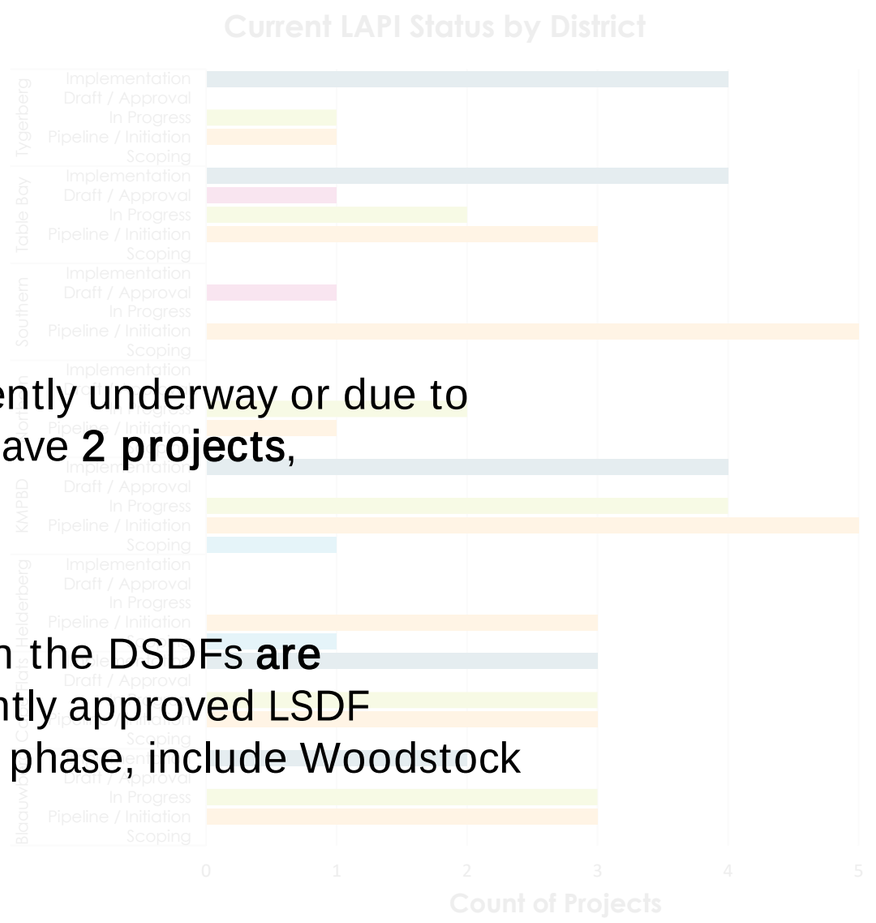


Figure F4-a: Bar chart showing the status of each project per district

- The Table Bay district has the most LAPIs, 4 projects, currently underway or due to commence, while **Blaauwberg, Helderberg, KMPGB** all have **2 projects**, respectively.

- Between all districts, 40% of LAPIs originally identified in the DSDFs **are approved and currently in implementation phase.** Recently approved LSDF projects in 2024 / 25 which are now in the implementation phase, include Woodstock - Salt River and Blaauwberg Road.

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.

G : DEVELOPMENT MECHANISMS/ INCENTIVES

G1 : Progress: implementation of development mechanisms / incentives

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

G.1

IMPLEMENTATION TRACKING

PROGRESS: IMPLEMENTATION OF DEVELOPMENT MECHANISMS/INCENTIVES

This indicator displays current development mechanisms and indicates the progress of each respective indicator.

2025 Update

Source: District Plan Vol. 3 2023

OVERVIEW

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

NHRA Exemptions:

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

Progress:

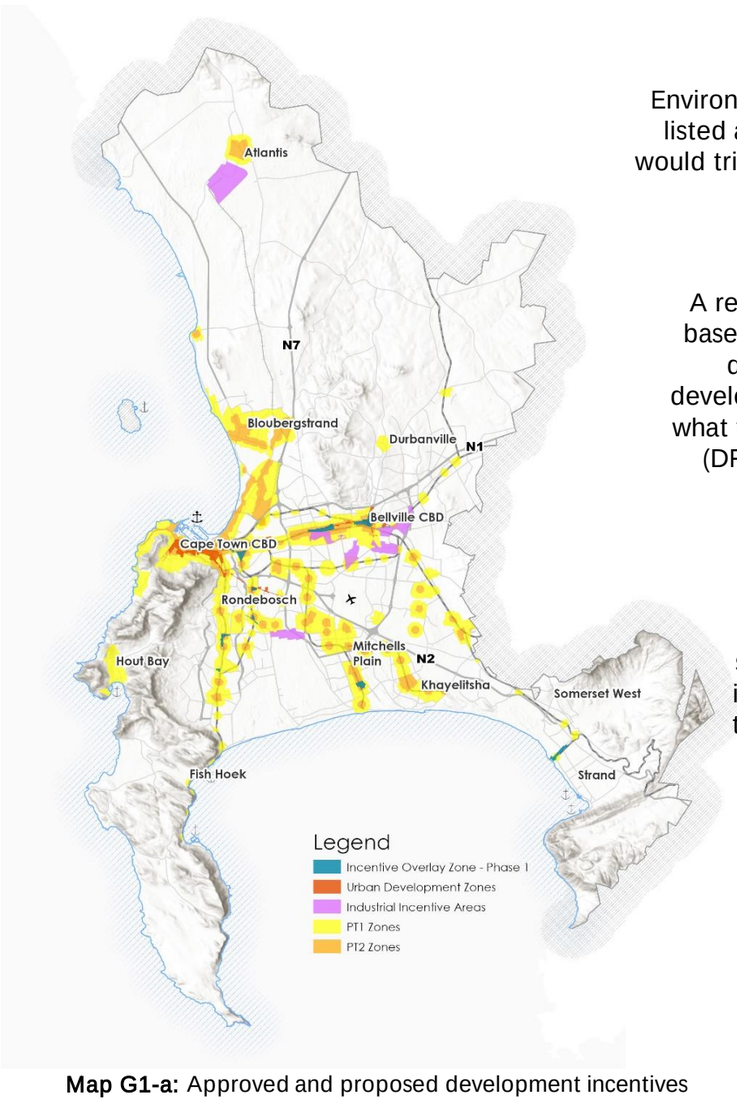
Active: The seven proposed areas have been gazetted for S34 and 38 exemptions as of 20 September 2024. A total of nine areas across the City are now gazetted.

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 have been 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

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:

Active: Approved and Gazetted in July 2025

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. **(Map G1-a).**

Progress:

Active: Five pilot areas have been approved and gazetted and went live on 1 October 2025.

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:

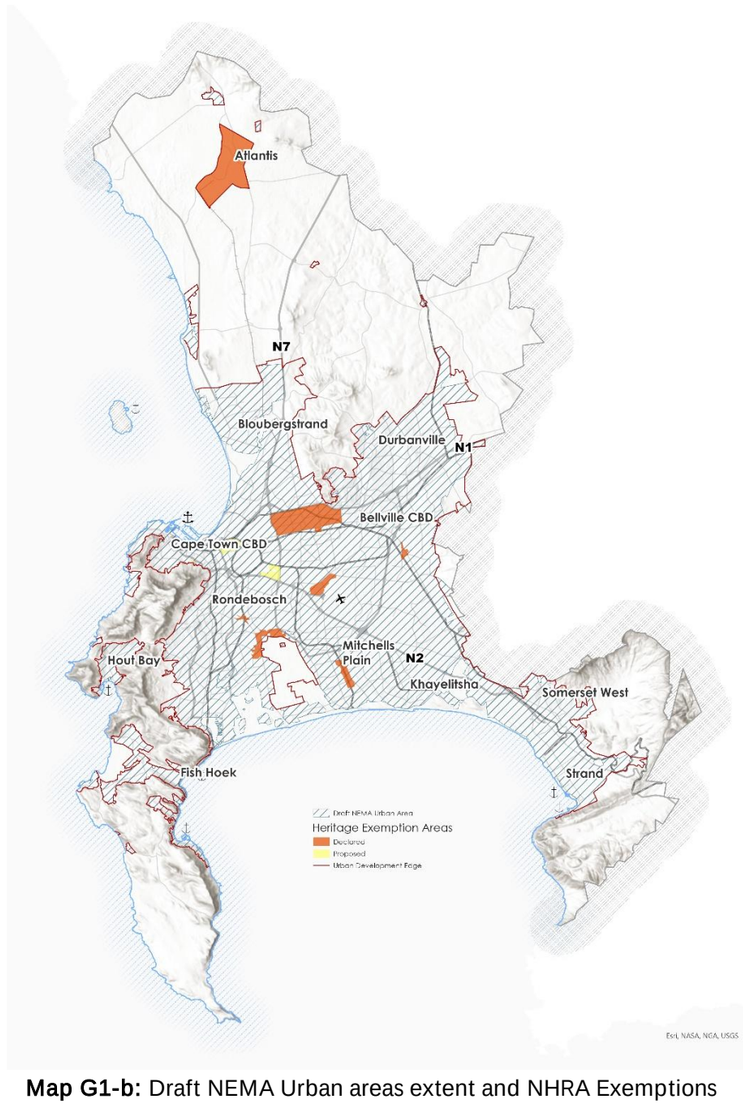
Active: The PT1 and PT2 Areas are approved as part of the Municipal Planning By-Law.

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.



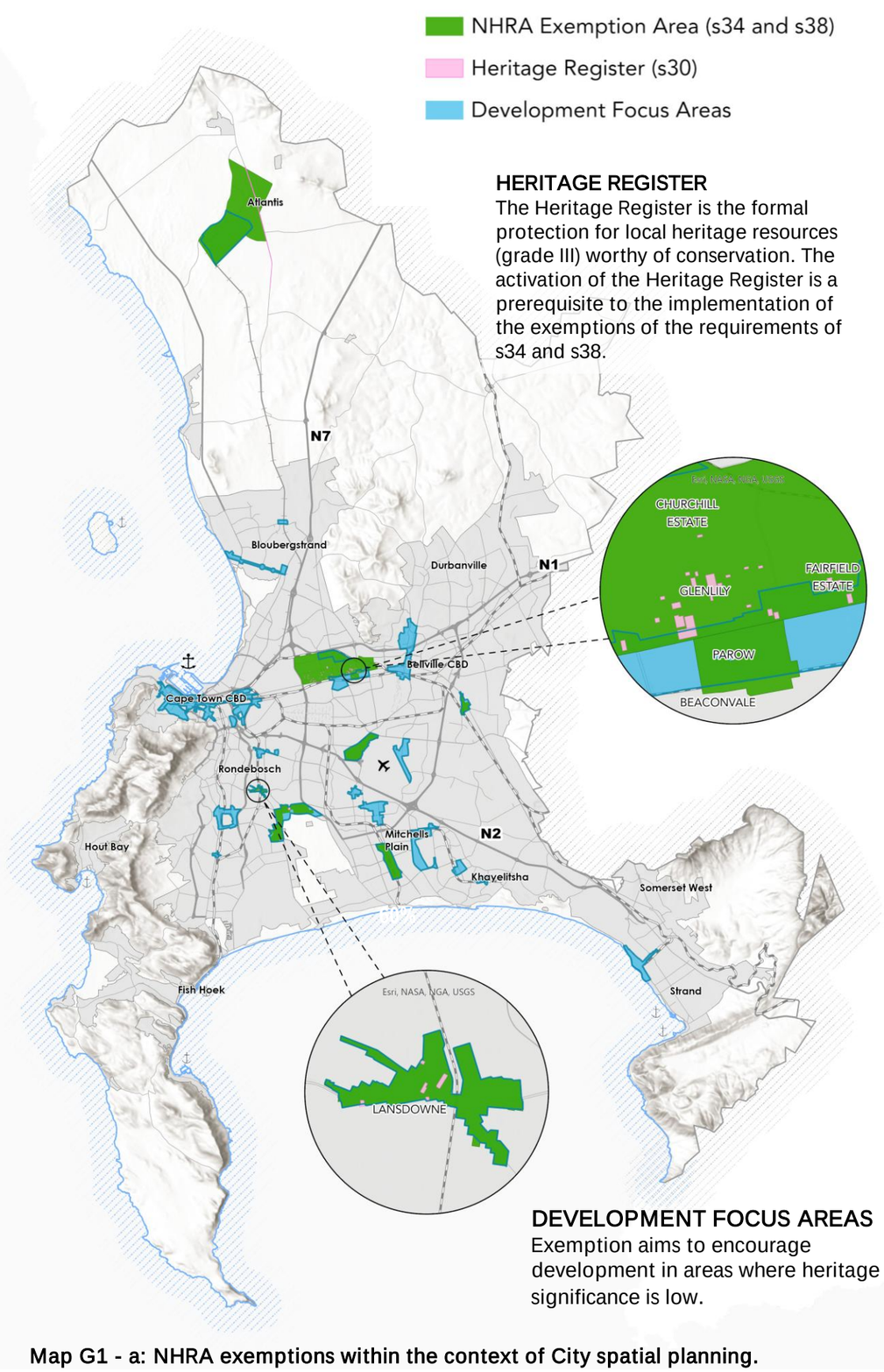
Map G1-b: Draft NEMA Urban areas extent and NHRA Exemptions

IMPLEMENTATION TRACKING

HERITAGE EXEMPTIONS

This indicator describes the status quo of the mechanisms within the National Heritage Resources Act, Act 25 of 1999 to relieve administrative burden and to promote the City's strategy of 'Ease of doing business'

Source: Environment and Heritage Resources, Environmental Management, City of Cape Town



HERITAGE REGISTER
The Heritage Register is the formal protection for local heritage resources (grade III) worthy of conservation. The activation of the Heritage Register is a prerequisite to the implementation of the exemptions of the requirements of s34 and s38.

DEVELOPMENT FOCUS AREAS
Exemption aims to encourage development in areas where heritage significance is low.

Map G1 - a: NHRA exemptions within the context of City spatial planning.

OVERVIEW

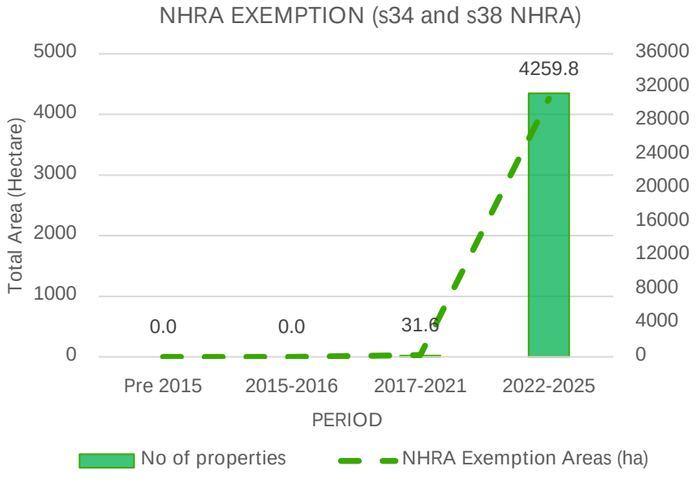
The City of Cape Town is the first local authority to implement or activate the exemptions provided for in the NHRA. The Parow Station Precinct was a pilot study undertaken in 2017-2021 to exempt this defined geographic area from the requirements of section 34 and section 38. i.e. application to HWC for NHRA permits. Subsequently, the number of NHRA exemption areas has increased to 8 defined geographical areas, covering 4259,8 ha. See Graph G1-a.
A pre-requisite of approving the exemptions, is the formal protection of heritage resources worthy of conservation in areas to be exempt. The formal protection within the NHRA for Grade III heritage resources is the Heritage Register (s30).
60 additional sites were added to the Heritage Register as part of the NHRA exemption implementation (72 sites, measuring 46,4 ha in total). See Graph G1-a.

The activation of the exemptions from the requirement of s34 and s38 of the NHRA is a major focus to alleviate the administrative burden associated with the '60 years clause'. Within the NHRA exemption areas, applicants are not required to apply for permits for the alteration or demolition of a structure or part of a structure older than 60 years. Developments which would have triggered s38 of the NHRA are also not required to apply for permission from HWC. All applications are dealt with through the City's Development Management processes. Heritage Register sites within these areas are managed through the HPOZ. There has been a concerted effort to focus on exemptions from the permitting requirements of s34 and s38 of the NHRA in areas where heritage significance is low or insignificant and there is alignment with other City mechanisms like the Development Focus Areas. The exemptions have the following benefits:

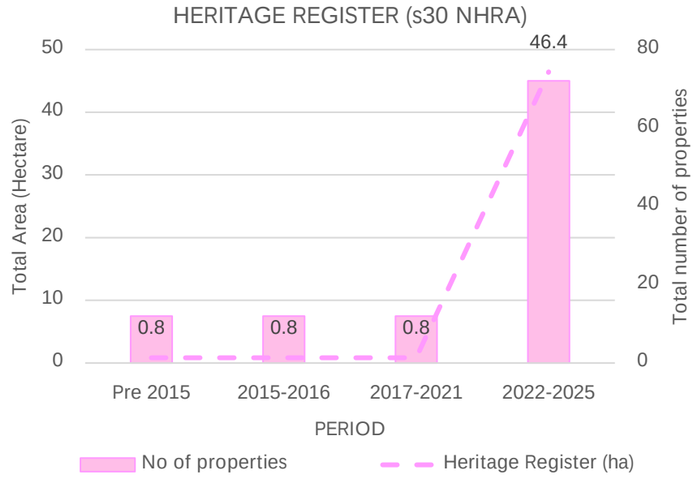
- Improves ease of doing business by removing the dual applications process, saving the applicant time and money
- Encourages development where it is appropriate in terms of (low) impact on heritage significance of the built environment
- Allows heritage management to focus where heritage is significant and worthy of conservation

OVERALL TREND

The number of NHRA exemption areas have increased significantly over the last few years. The 8 areas cover 4259,8 ha and over 31 000 properties, an increase from approximately 31 ha and 163 properties in the Parow Station Precinct activated in 2021. An additional 60 sites covering 45,6 ha have been added to the Heritage Register as part of the exemption process.



Graph G1-a: Activation of the NHRA exemptions



Graph G1-b: Sites added to the Heritage register as part of the exemptions process.

Note: All the existing Heritage Register sites prior to the activation of the exemptions from the requirement of s34 and s38 of the NHRA were declared under the previous National Monuments Act, 1969.

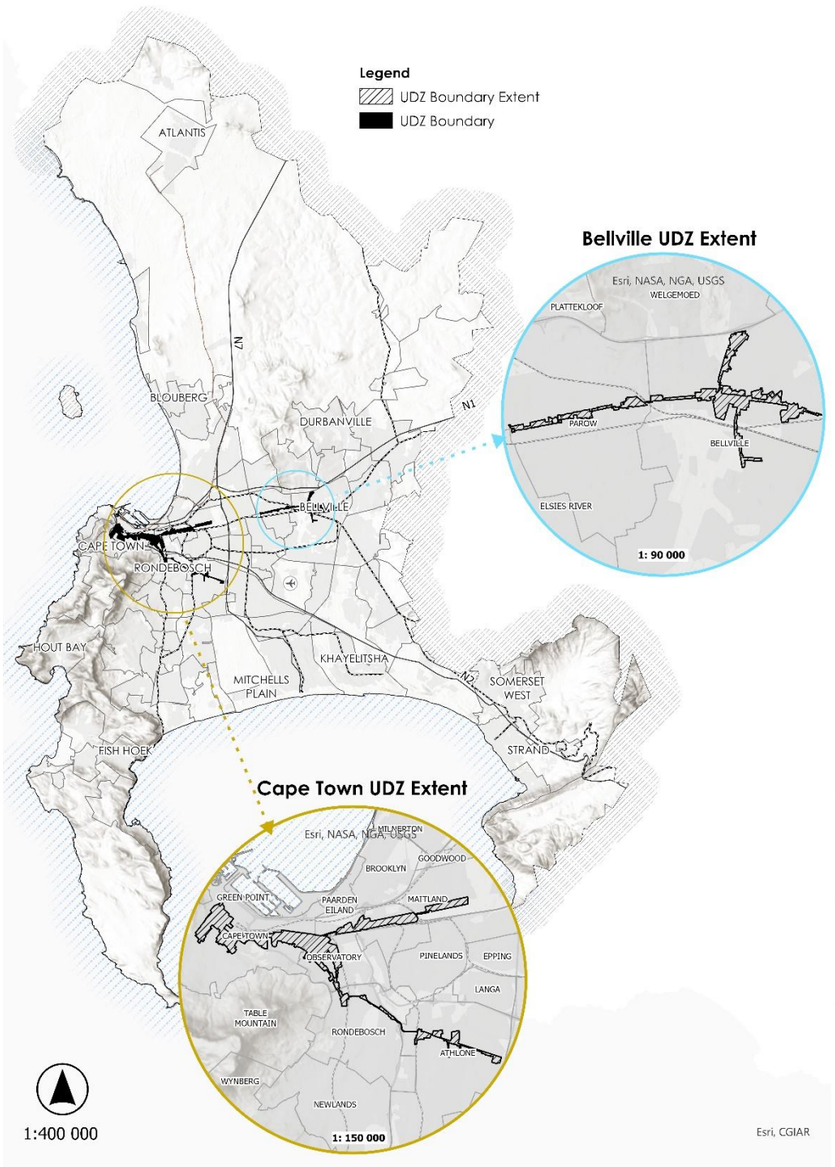
G.1b

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



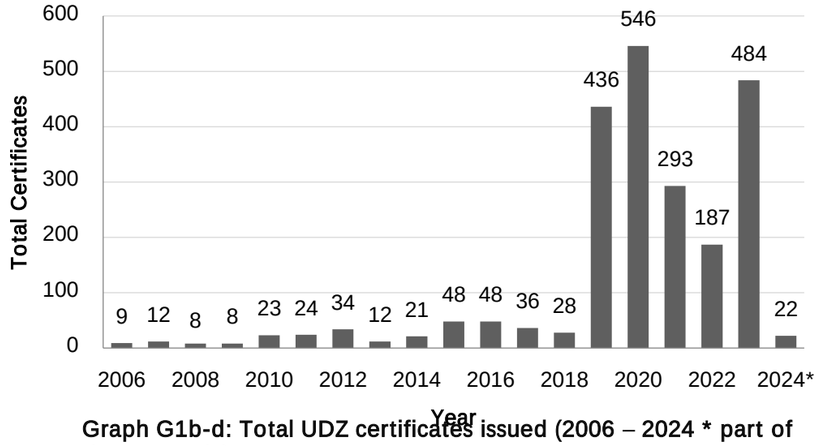
Map G1b-a: Cape Town UDZ location and extents

OVERVIEW

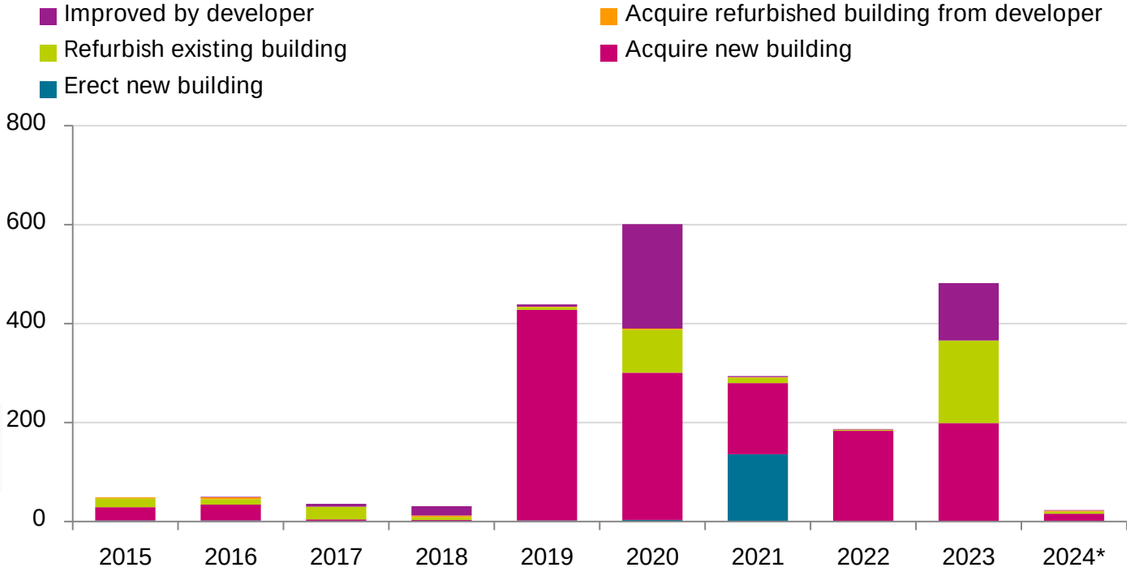
The Cape Town UDZ was gazetted on the 14th of October 2004 (Government Gazette number 26866) is a tax incentive scheme aimed at encouraging inner city renewal across South Africa by the South African Revenue Services (SARS). Any taxpaying, property owning, individual or entity may claim the tax benefits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

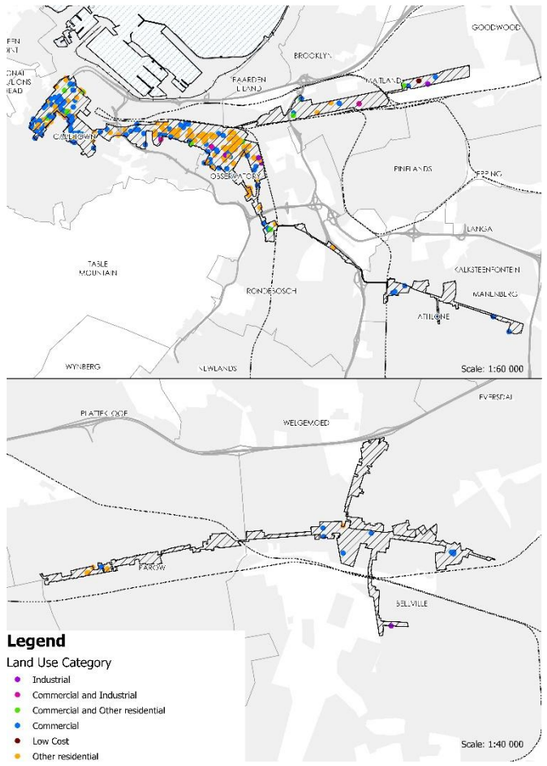


Graph G1b-b: Number of UDZ certificates issued by Type, 2006 - 2024

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.

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

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.

- **Recent mechanisms approved include** The NHRA Exemptions S34 and 38 exemptions (approved and gazetted in September 2024), the NEMA Urban Area Incentive (approved and gazetted in July 2025), and the Incentive Overlay Zones (approved, gazetted and in affect from 1 October 2025).

- The NHRA exemption areas have grown from 31,6 ha to 4259,8 ha
- The number of sites placed on the Heritage Register as part of the NHRA Exemption process has grown by 500% (+ 60 properties).

NHRA Exemptions:

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

Progress:

In progress: 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. Two of the proposed areas have been gazetted for S34 and 38 exemptions as of 12 April 2024 (i.e. Airport Industria and Mitchell's Plain Exemption Areas).

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

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

or land uses in the city.

Draft NEMA Urban Area Progress:

Environmental Management Act, Act 107 of 1998 (NEMA) for

would trigger a Basic Impact Assessment or Full Environmental Impact Assessment (**Map G1-b**).

DEA&DP will engage regarding the alignment of the proposed NEMA Urban Area with the Urban Development Edge.

Progress:

In progress: Technical investigation

the incentive overlay zone. Five pilot areas currently out for public comments as part of the Municipal Planning By-law Review.

Incentive Overlay Zone (IOZ):

A regulatory tool that refers to a zoning, in addition to the

densities, land use types, and economic sector types of

what the District SDF refers to as Development Focus Areas (DFAs), through enhancement of development rights and reduced timeframes for approval.

PT1 and PT2 Zones (Public Transport Zones):

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

Progress:

Active – The PT1 and PT2 Areas are approved as part of the Municipal Planning By-Law.

Urban Development Zone (UDZ)

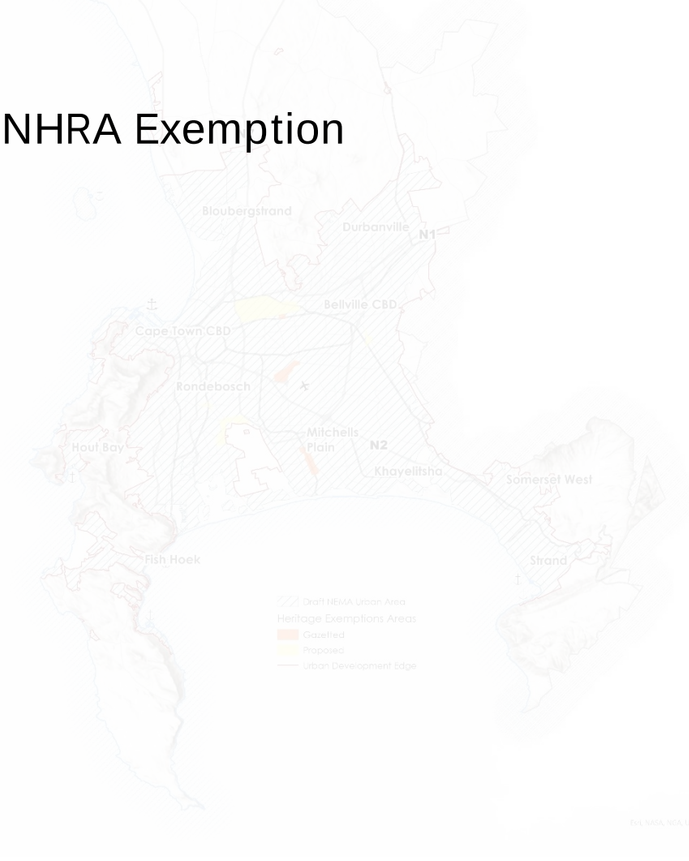
The UDZ is a National Treasury tax incentive administered by the municipality that aims to address urban decay in South Africa's inner cities by promoting private sector-led investment in commercial and residential developments. The incentive is currently applicable to the central city, Parow and Belleville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

Progress:

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



Map G1-a: Approved and proposed development incentives



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

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 2.0	Comprehensive Report	November 2024
Version 3.0	**Annual Review**	**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 – 2024
Environmental Land Acquisitions	CCT – Environmental Management	2012 – 2024
Heritage Register s30	CCT – Heritage Management	2015 – 2025
Agricultural Areas of Significance	WCG – Department of Agriculture	2012 – 2023
EIA Applications	WCG – DEADP	2018 – 2024
Urban Development Edge	CCT – Urban Planning and Design	2012 – 2024
Built Extent	CCT – Urban Planning and Design	2012 – 2024
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	2020 – 2025
Human Settlements Projects; Areas of Informality	WCG & CCT – Human Settlements	2013/14 – 2024/25
Capital Projects (SAP PPM)	CCT - Corporate Project, Programme and Portfolio Management	2017/18 - 2024/25 as of June 2025 for CoCT and Mar 2024 for WCG

END

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD