SPATIAL TRENDS AND IMPLEMENTATION TRACKING - 2026

DATA, MONITORING AND EVALUATION REPORT








DEPARTMENT: URBAN PLANNING AND DESIGN

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Making progress possible. Together.

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EDITORS' NOTE

Scope of the 2026 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 annual edition also includes special features that highlight noteworthy spatial trends and developments.

The 2026 Review represents a substantial update to the previous report, with most panels undergoing a comprehensive review. This is due to the incorporation of the 2025 version of one of our key informant datasets, the General Valuation (GV) Roll, which is only formally updated every three years. In addition, this report includes data from the Land Use Model Base for the first time, providing a more comprehensive picture of residential development across the city, including housing typologies not fully captured within the GV dataset.

An important methodological advancement introduced in recent years has been the integration of consistently processed General Valuation data. The report now analyses five valuation roll periods spanning 2012 to 2025, using a standardised classification methodology and consistent analytical assumptions across all years. This approach improves data reliability and enables robust long-term trend analysis and comparison.

New additions and revisions

This year's report introduces a series of new panels focused on property market activity, developed in collaboration with the Economic Analysis Branch. Biodiversity-related content has also been substantially revised and expanded to include a new wetlands tracking analysis prepared by the Biodiversity Management Branch. These additions can be found in Sections B and C of the report.

Updated Panels

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

- Biodiversity network
- Environmental impact assessments
- Residential density, non-residential land use and diversity of use patterns
- Property value changes
- 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

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

Reflections on Spatial Trends in Cape Town

The report highlights a range of significant spatial trends shaping Cape Town's urban environment. Urban expansion continues to influence the city's development footprint, while the shift towards formally protected biodiversity areas reflects ongoing efforts to balance growth with sustainability objectives.

Patterns of residential development indicate increasing levels of inward growth and densification in targeted areas, reflecting progress towards spatial transformation objectives. Trends in non-residential development within established development corridors and key employment nodes suggest continued market preference for these locations and the reinforcement of existing economic geographies.

The analysis of land use diversity, development intensity, and patterns of informality provides additional insight into the complexity of Cape Town's evolving urban form. Furthermore, trends relating to government-subsidised housing delivery and the spatial distribution of capital expenditure demonstrate the City's continued commitment to inclusive growth, service delivery, and infrastructure investment.

Looking Ahead

The next review of the Spatial Trends Report is scheduled for completion during the 2026/27 financial year. We look forward to continuing to monitor and report on Cape Town's changing land use patterns and spatial development trends.

We extend our sincere thanks to all contributors, stakeholders, and readers for their continued support and engagement.

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MONITORING AND EVALUATION FRAMEWORK

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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
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 (2050)	Land Use Model (2050)
LUMS	Land use management system
M&E	Monitoring and Evaluation
MPBL	Municipal Planning By Law, 2015 (City of Cape Town)
MPT	Municipal Planning Tribunal
MSA	Municipal Systems Act (No 32 of 2000)
MTIF	Medium Term Infrastructure Framework
MTREF	Medium Term Revenue and Expenditure Framework
MUIA	Mixed Use Intensification Area
MURP	Mayoral Urban Renewal Programme
NDA	New Development Area
NDP	National Development Plan
NEMA	National Environmental Management Act (No 107 of 1998)
NHRA	National Heritage Resources Act (No 25 of 1999)
OP&M	Organisational Performance and Management branch
PGWC	Provincial Government Western Cape
PHA	Philippi Horticultural Area
PHSHDA	Priority Human Settlements Housing Development Area
PIIF	Public Infrastructure Investment Framework
PLFA	Priority Local Facilitation Area
PNE	Protected Natural Environment
POA	Philippi Opportunity Area
POS	Public Open Space
PPM	Project Portfolio Management
SANParks	South Africa National Parks
DSDF	District Spatial Development Framework
SEZ	Special Economic Zone
SMF	Strategic Management Framework
SSRU	Small Scale Rental Units
SPC	Spatial Planning Category
SPLUMA	Spatial Planning and Land Use Management Act
SRA	Special Rating Area
STA	Spatial Transformation Areas
TMNP	Table Mountain National Park
TRA	Temporary Relocation Area
UDE	Urban Development Edge
UPD	Urban Planning and Design Department
UIC	Urban Inner Core
UISP	Upgrade of Informal Settlement Programme
UPDLI	Undeveloped and Partially Developed Land Inventory
USFA	Urban Support Focus Area
WWTW	Waste Water Treatment Works

INTRODUCTION

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

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MONITORING AND EVALUATION FRAMEWORK

INTRODUCTION

Purpose of this report

This report is 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.

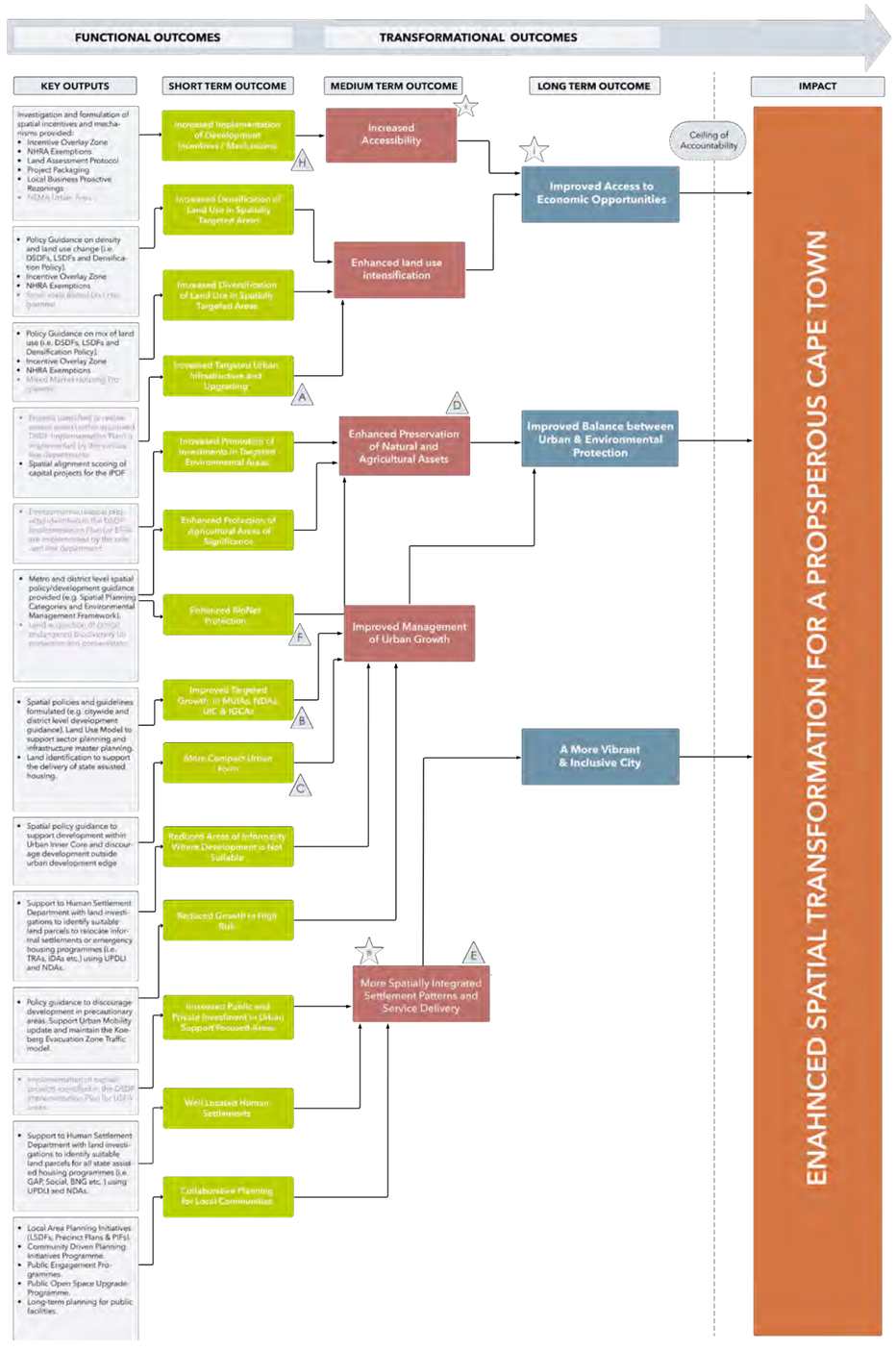
EXTERNAL/RISK FACTORS

- 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

- A — Assumption
- 1 — 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?



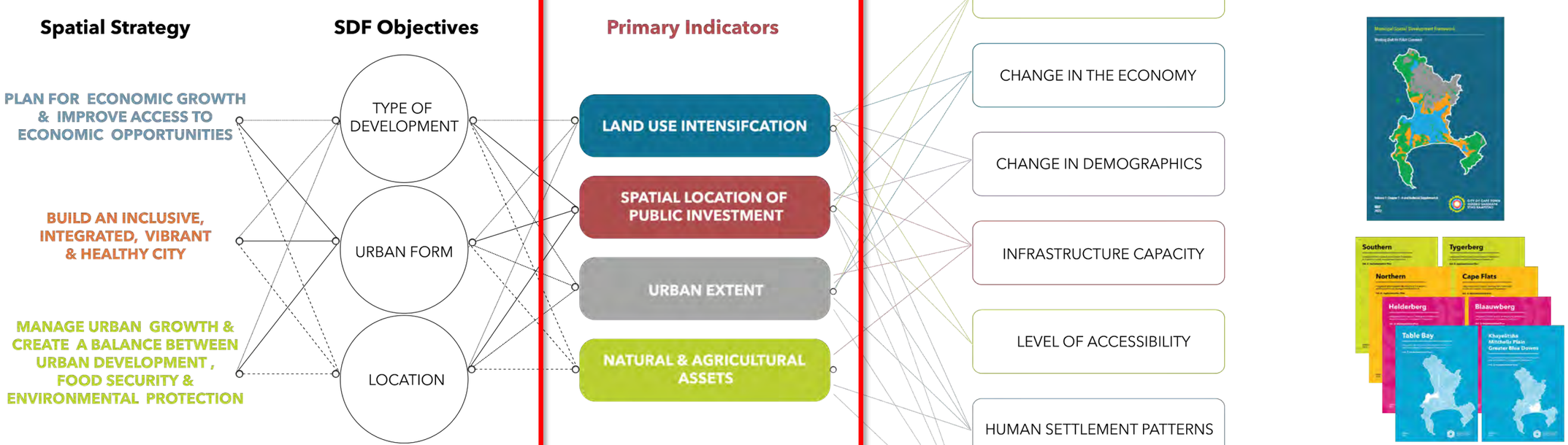
Braoder indicators that need to be understood in order to justify why spatial trends occur and why spatial policy is successful or unsuccessful in managing development.

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

Secondary Indicators

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

OUTPUT:
Evaluation Report

OUTPUTS:
Revised MSDF and DSDFs

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

USER GUIDE

HOW TO INTERPRET THE COMPONENTS OF INFORMATION FOR EACH INDICATOR PANEL

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

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

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

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

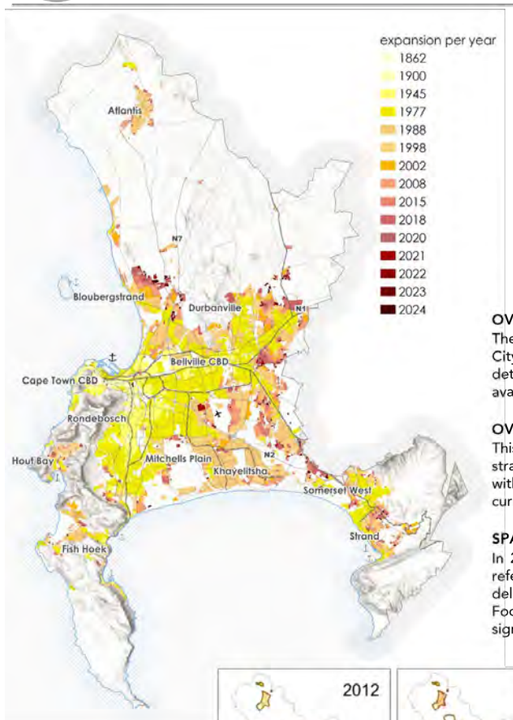
A.1

URBAN EXTENT

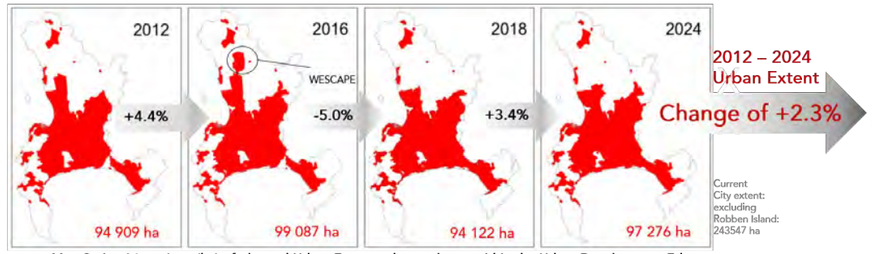
URBAN FOOTPRINT AND URBAN EXTENT

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

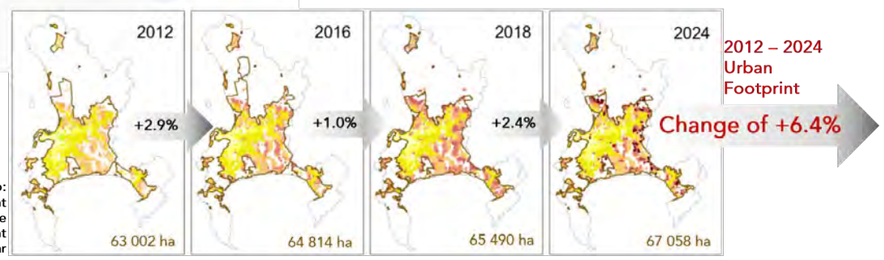
The **Urban Development Edge** (UDE) is a City planning boundary that assists to limit urban sprawl. Land within the UDE and landward of the City's Coastal Edge is known as the planned **Urban Extent**. The Urban Extent includes areas that are undeveloped and that, subject to a detailed site investigation, 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 1:30 000.

OVERALL TREND

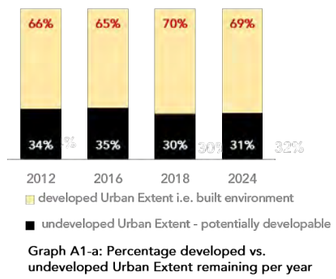
This indicator assists in determining the pace at which land available for development is being consumed and whether City policies and strategies to contain urban sprawl are effective. While the Urban Extent has generally been contained (Map Series A1-a), the Urban Footprint within that Extent has increased 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



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

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

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

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

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

THEMATIC INDEX

A	Urban Extent Indicators: A1
B	Natural, 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

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

PART 1: SPATIAL TRENDS REPORT

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

A : URBAN EXTENT

A1 : Urban footprint and urban extent

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

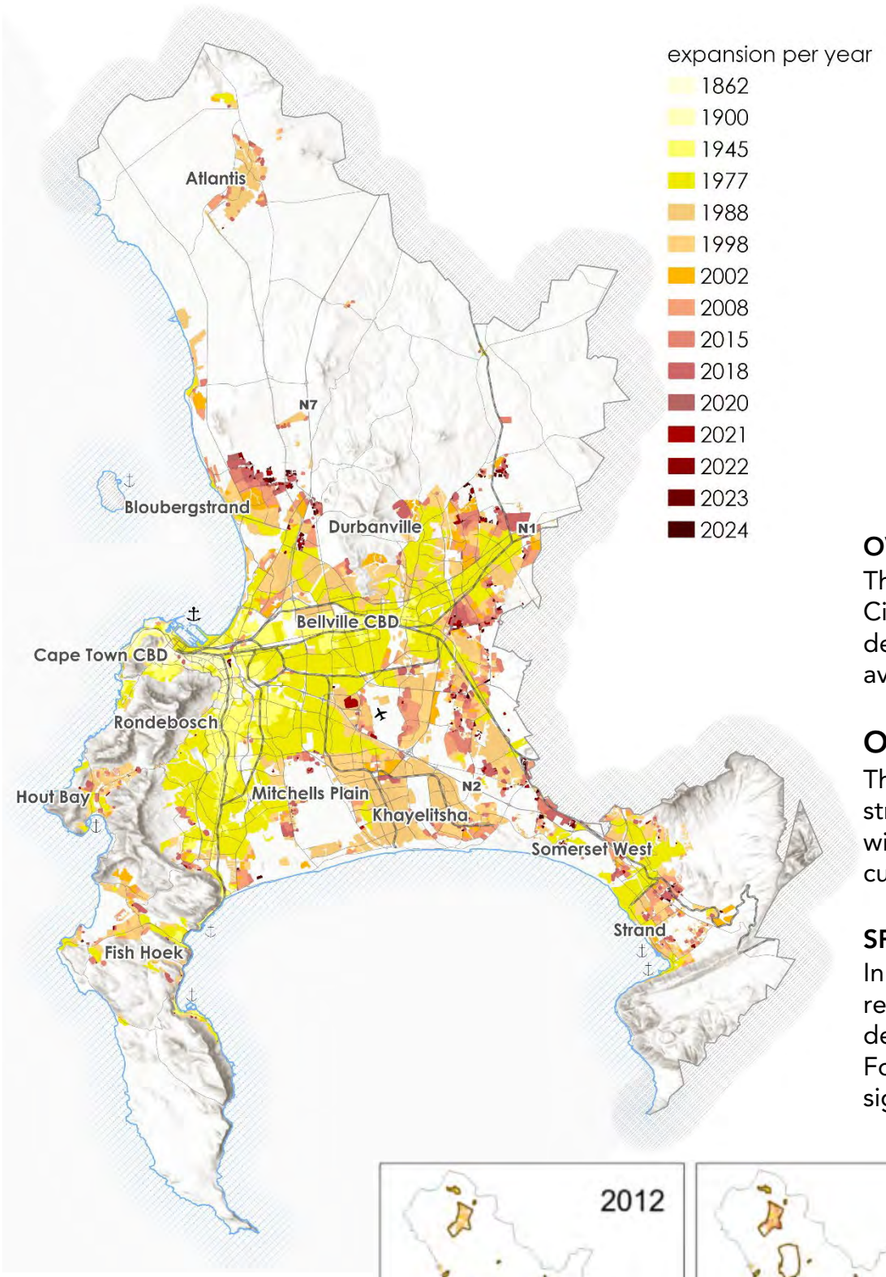
A.1

URBAN EXTENT

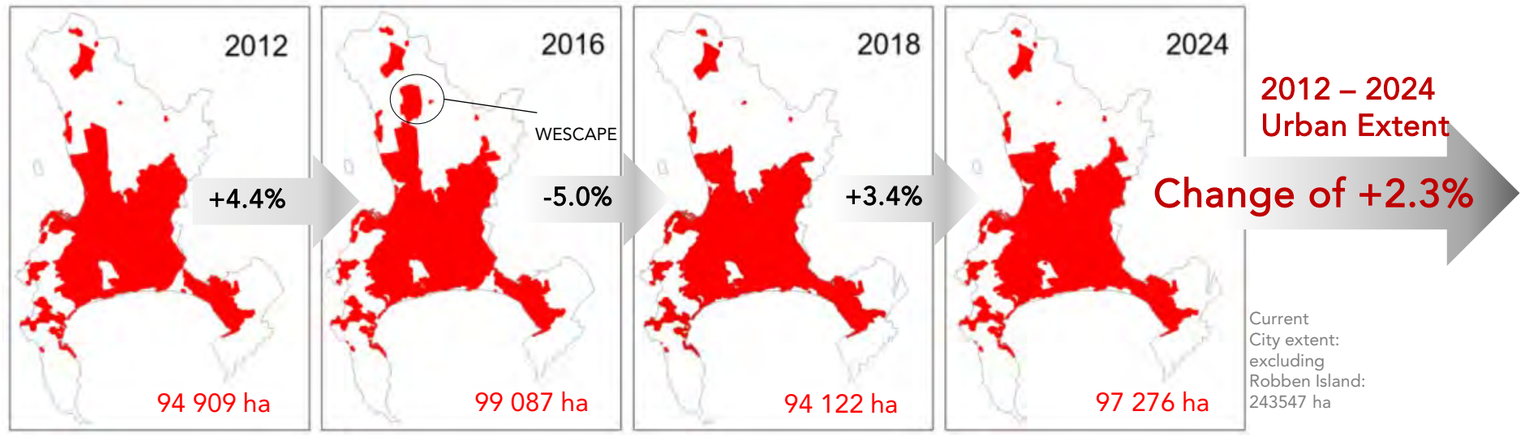
URBAN FOOTPRINT AND URBAN EXTENT

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 1:30 000.

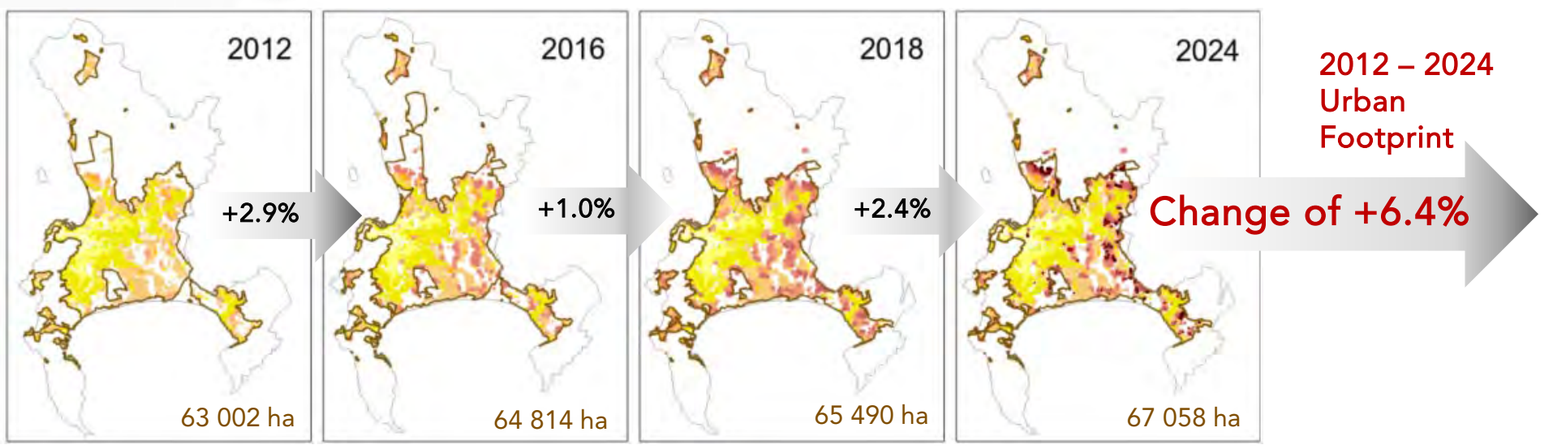
OVERALL TREND

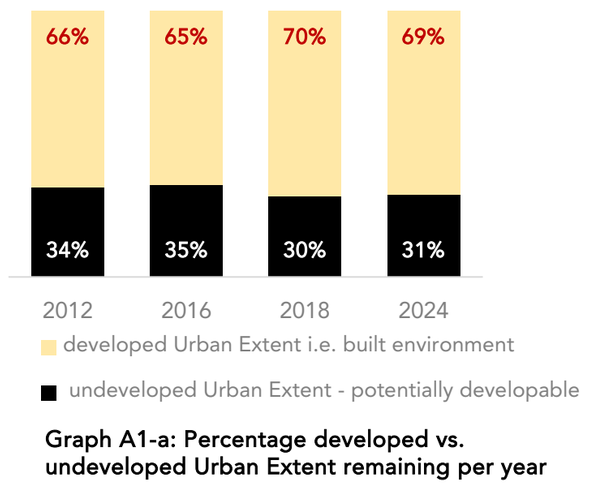
This indicator assists in determining the pace at which land available for development is being consumed and whether City policies and strategies to contain urban sprawl are effective. While the Urban Extent has generally been contained (Map Series A1-a), the Urban Footprint within that Extent has increased 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



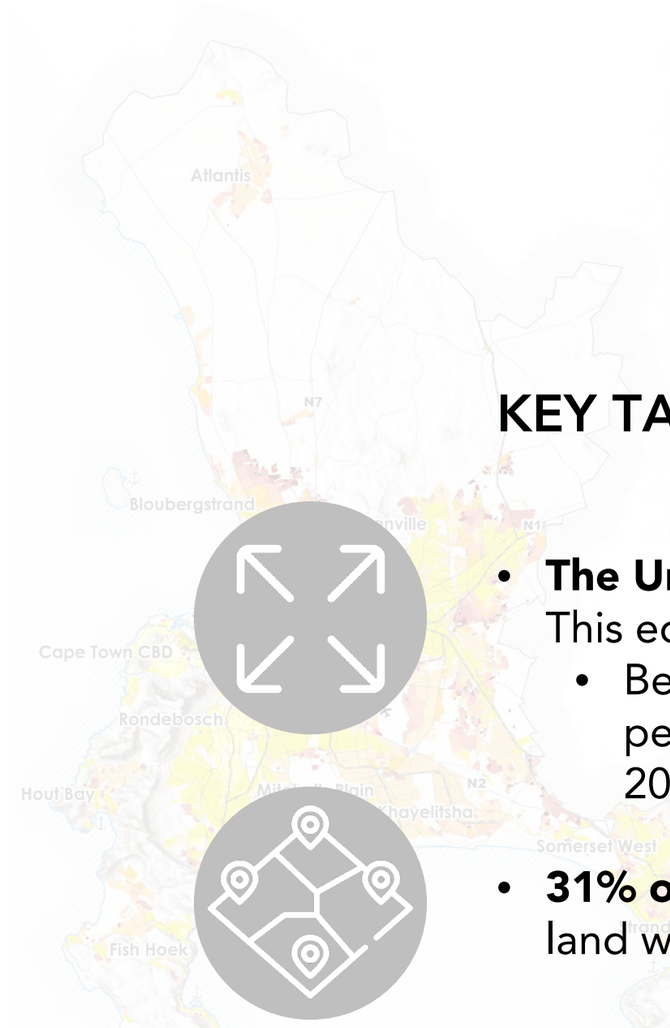


Graph A1-a: Percentage developed vs. undeveloped Urban Extent remaining per year

A.1

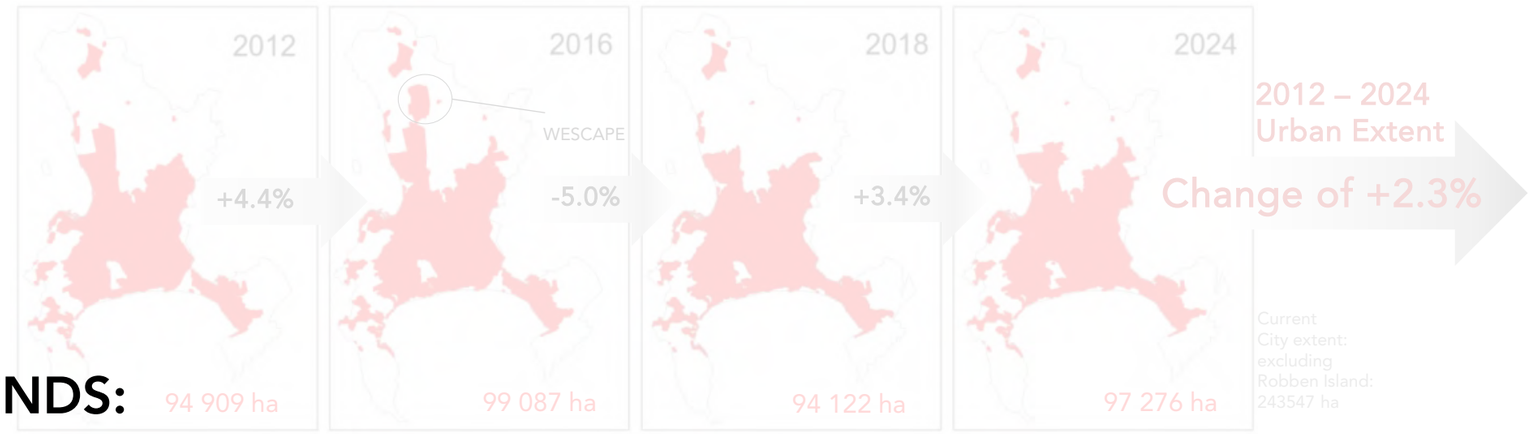
URBAN EXTENT

URBAN FOOTPRINT AND URBAN EXTENT



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

KEY TAKE-AWAY TRENDS:

- **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 (2026 Update + New)

B2 : Early detection - EIAs (2026 Update)

B3 : Areas of agricultural significance

B4 : Heritage Protection

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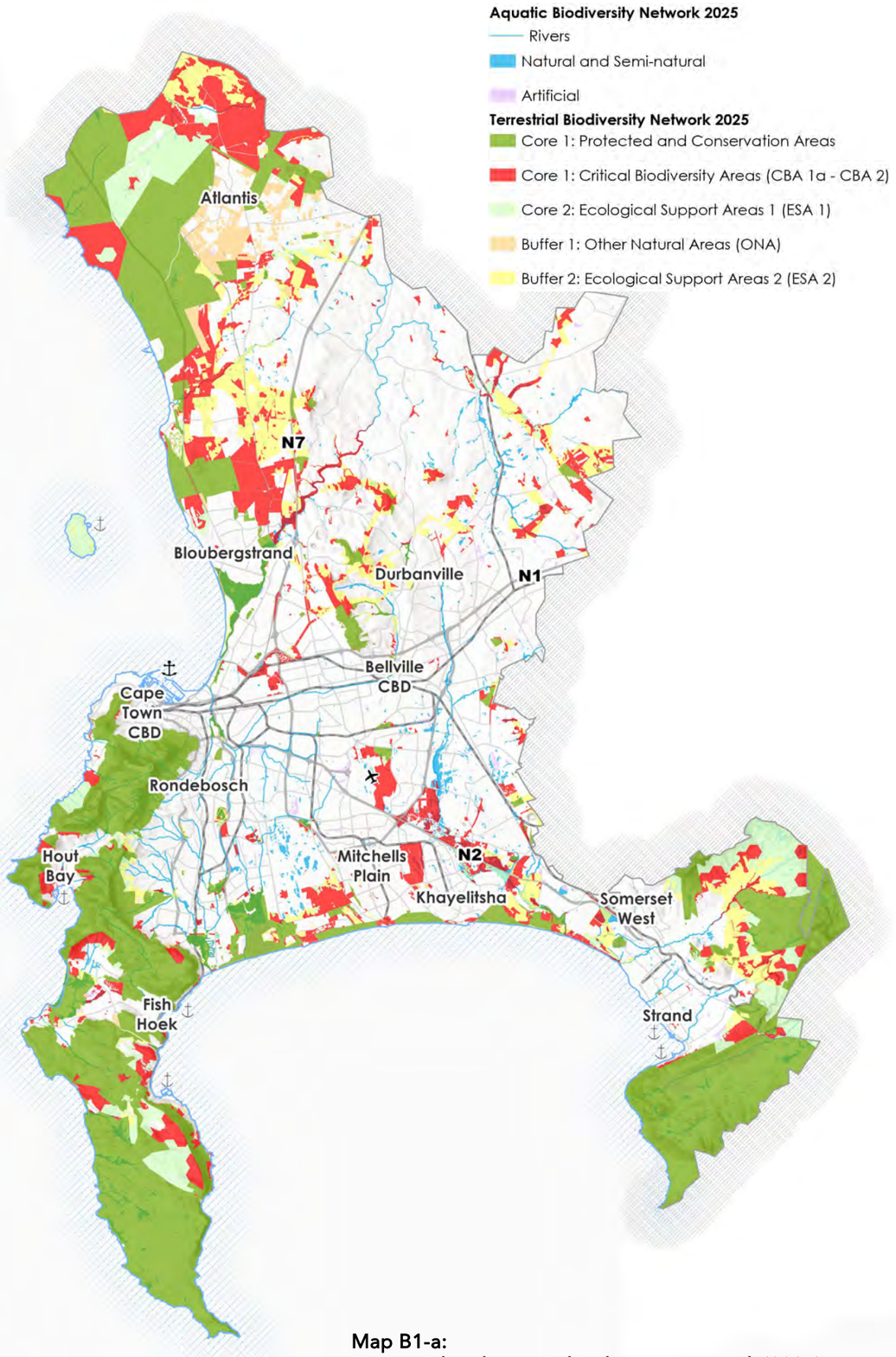
B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

This indicator shows the change in the extent of the terrestrial biodiversity network over time (2009-2025).

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



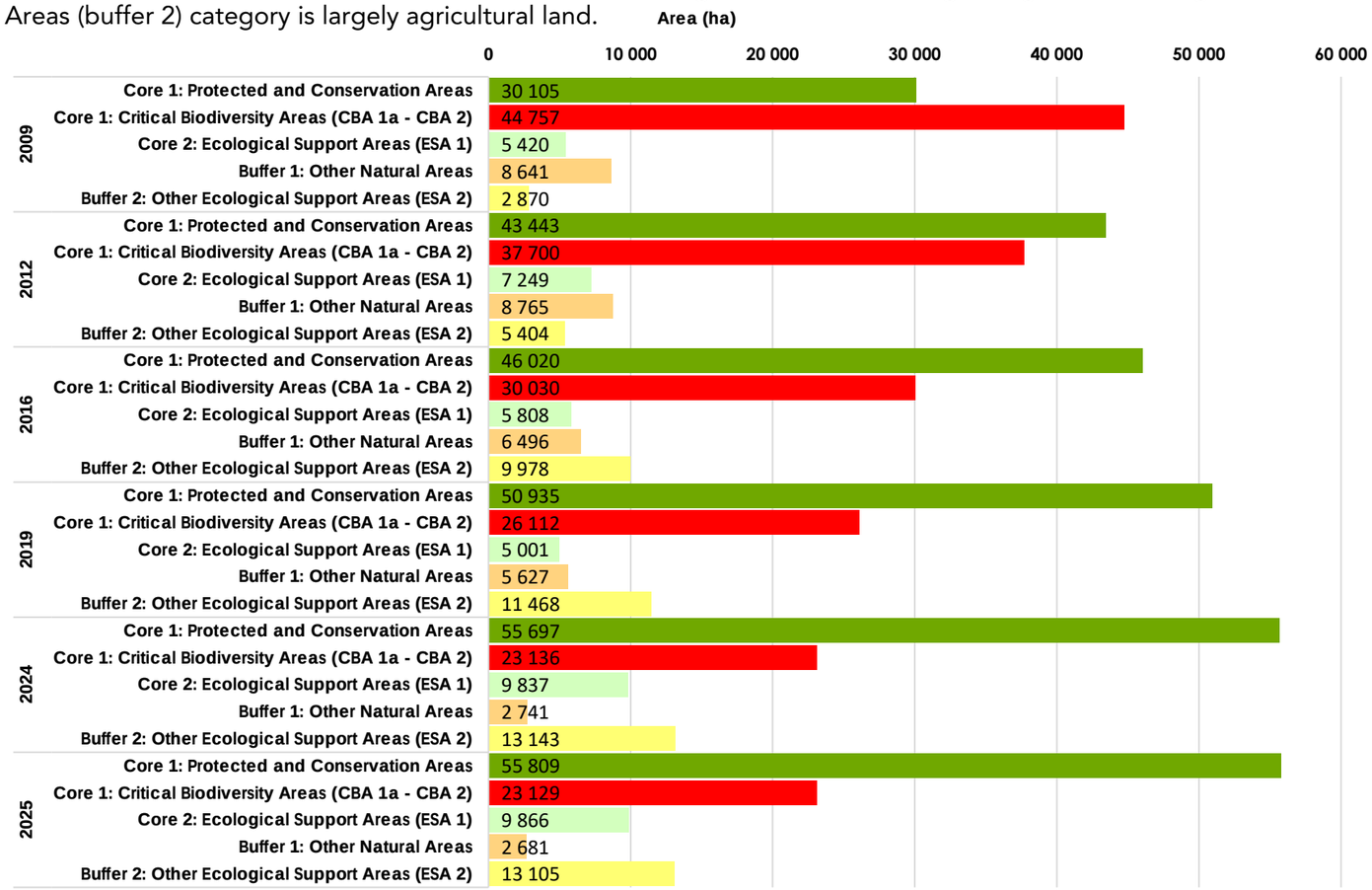
Map B1-a:
Terrestrial and aquatic biodiversity network (2025).

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 (BPA, formerly CBA) 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 ensuring sound ecological management of 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.

OVERALL TREND

This indicator monitors the pace at which biodiversity is being lost to other land uses and whether national legislation, City policies and City strategies to protect it are effective. It also tracks the rate at which habitat is being protected via proclamation and/or on-site management. As Graph B1-a shows, there have been significant gains in the proclamation and conservation of the Biodiversity Priority Areas of the BioNet. The extent of Other Natural Areas (Buffer 1) has reduced significantly since 2009, having been developed or prioritised as core areas in later analyses as options to conserve habitat become limited. Although the overall area of the total BioNet increased to 104 591 ha in 2025 from 91 793 ha in 2009 (Graph B1-a), the core area and extent of indigenous vegetation remaining has reduced. The protected and conservation area category includes large waterbodies, as well as small developed areas for visitor amenities without remnant vegetation. Also, the growing Other Ecological Support Areas (buffer 2) category is largely agricultural land.



Graph B1-a: Extent (hectares) of total biodiversity network between 2009 (baseline) and 2025 (current) – includes both core & buffer areas. Note: Statistics may vary slightly at times due to different methods of geoprocessing used.

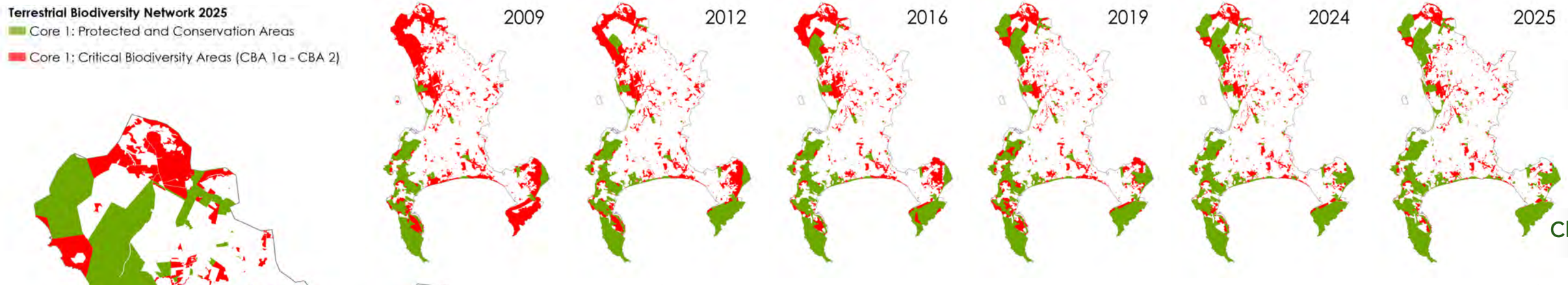
B.1

NATURAL AND AGRICULTURAL ASSETS

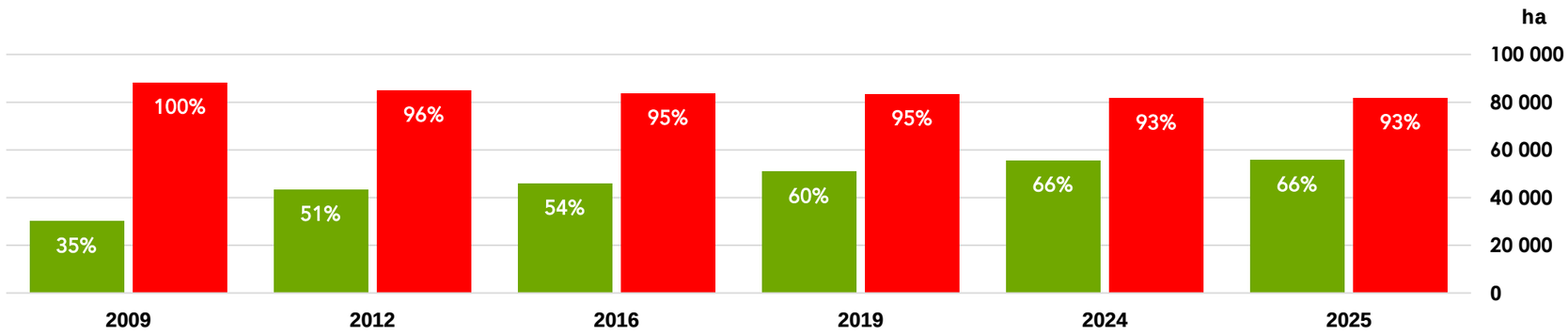
BIODIVERSITY NETWORK

This indicator focuses on the change in the extent of the core terrestrial biodiversity network over time (2009-2025), including protected and conservation areas.

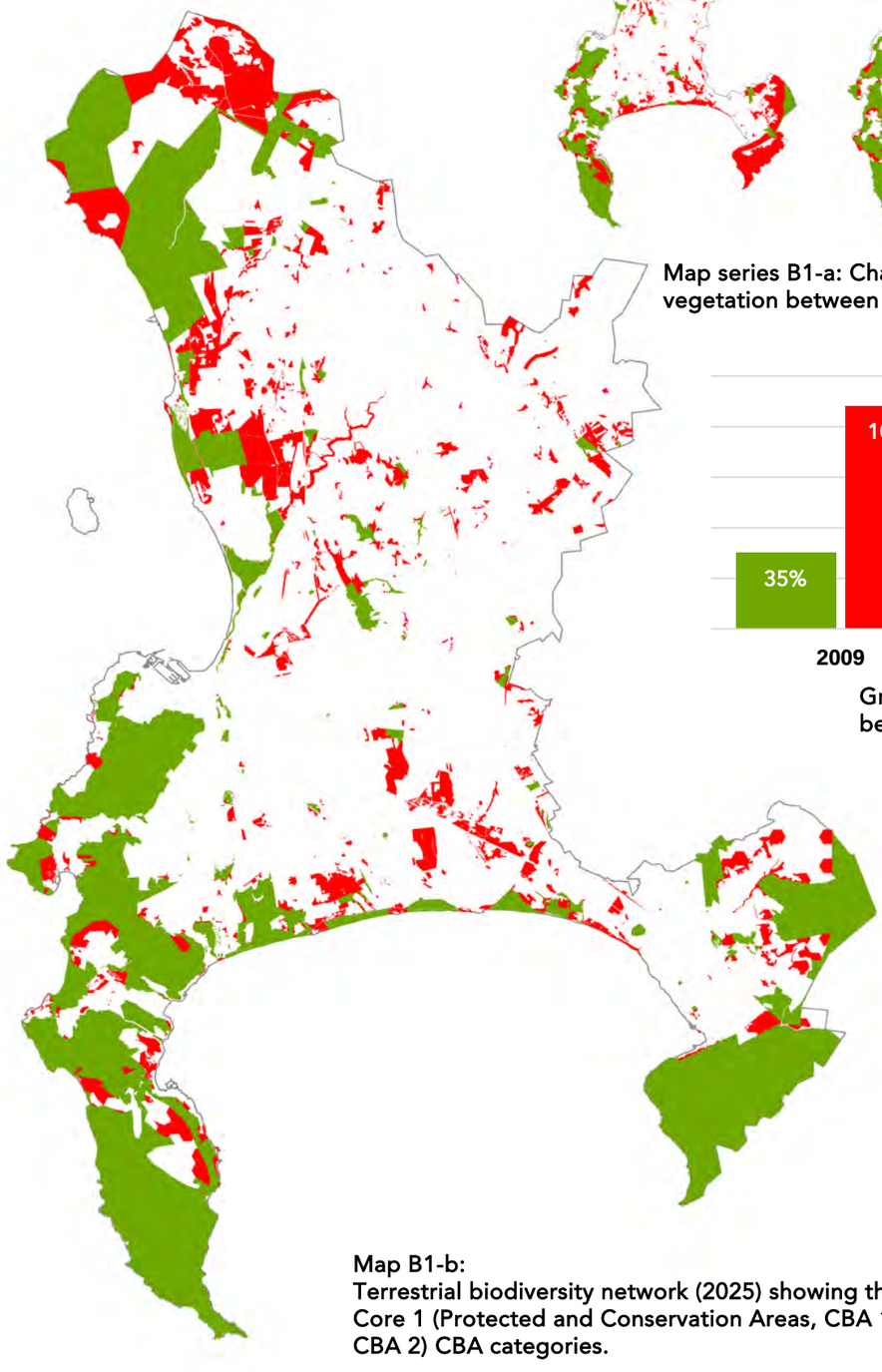
Source: Biodiversity Management, Environmental Management, City of Cape Town



Map series B1-a: Change of protected and conservation areas, including core biodiversity network areas (CBA 1 -2) i.e. the prioritised remnants of indigenous vegetation between 2009 and 2025. Note: Only Core 1 areas shown above. Biodiversity network Core 2 (ESA 1), Buffer 1 (Other Natural Areas) and Buffer 2 (ESA 2) 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 2025 (current).



Map B1-b:
Terrestrial biodiversity network (2025) showing the Core 1 (Protected and Conservation Areas, CBA 1a-CBA 2) CBA categories.

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 2025. However, there was a 30% increase in the extent of BioNet that is protected and/or conserved (see map series B1-a and Graph B1-b).

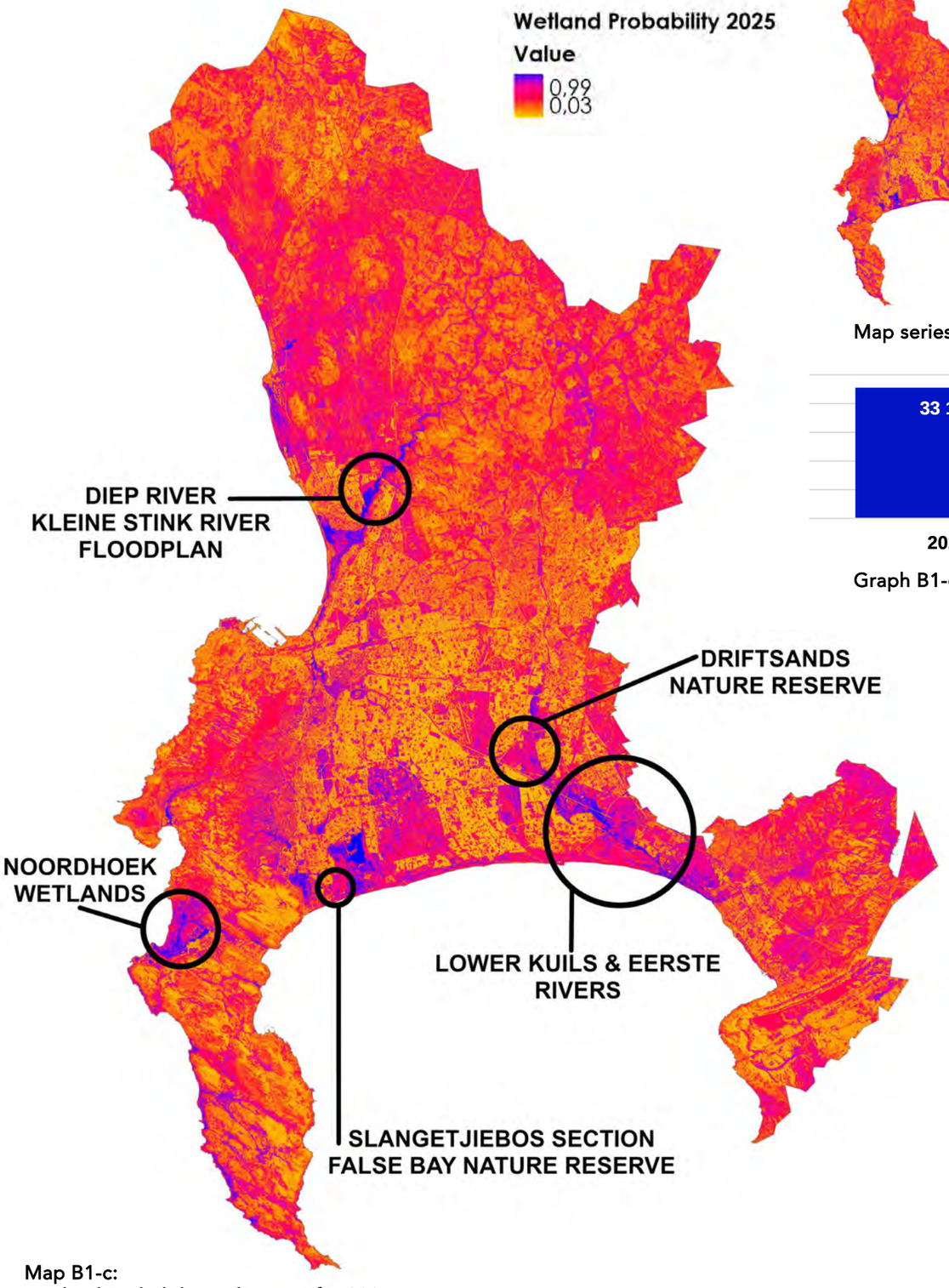
NATURAL AND AGRICULTURAL ASSETS

WETLANDS

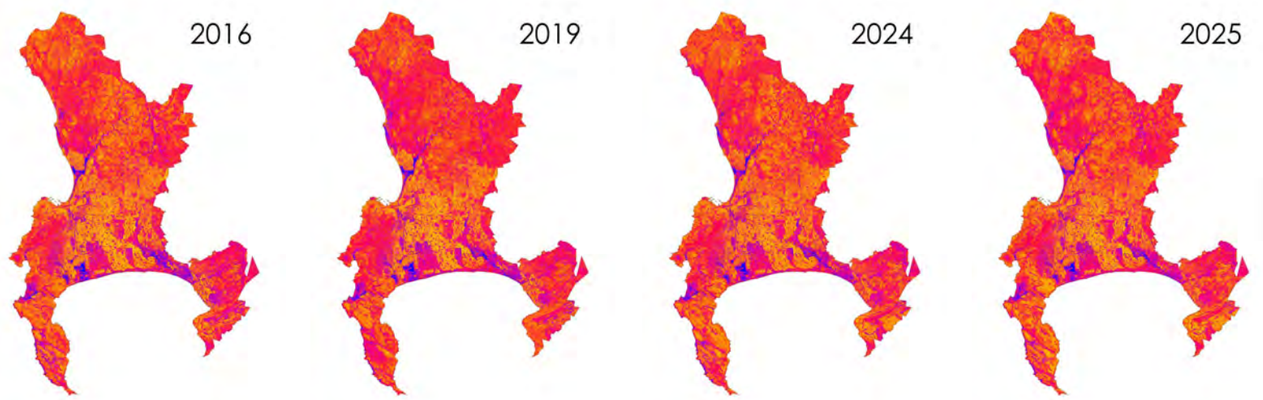
2026 New

This indicator focuses on the potential change in spatial trend of wetland probability extent over time (2016-2025).

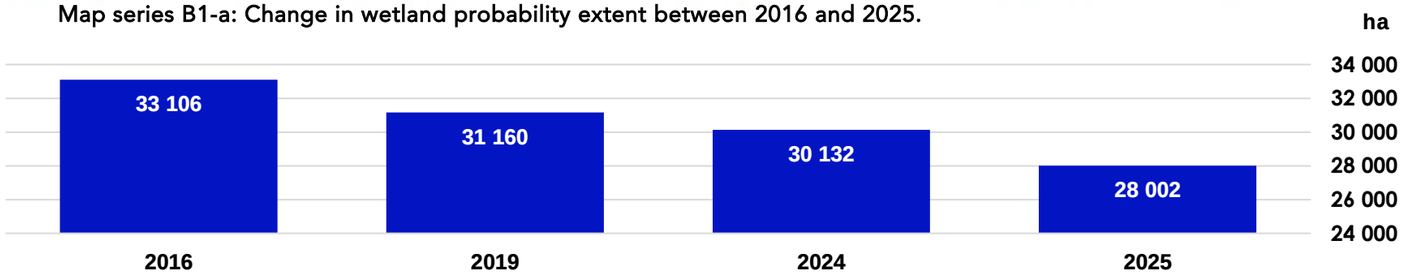
Source: Biodiversity Management, Environmental Management; City of Cape Town Wetland Report 2024 (Day et al., 2024)



Map B1-c:
Wetland Probability index map for 2025.
A wetland probability value of 0 = impossible and 1 = certain.



Map series B1-a: Change in wetland probability extent between 2016 and 2025.



Graph B1-c: Area (ha) of potential wetland loss between 2016 and 2025.

OVERALL TREND

To better understand wetland loss in Cape Town, **a** wetland probability mapping machine learning-based classification approach in Google Earth Engine (GEE) was used to identify and map potential wetland areas across Cape Town at a 10m spatial resolution. The wetland probability mapping indicates an overall declining trend in wetland probability across Cape Town between 2016 and 2025, with estimated wetland area decreasing from approximately 33 106 ha to 28 002 ha, representing a net loss of roughly 5 104 ha over the ten-year period. Minor interannual fluctuations broadly correspond with climatic variability and rainfall patterns, particularly the severe 2015–2018 "Day Zero" drought and subsequent wetter years, with lower wetland extents between 2017 and 2022 likely linked to reduced surface water availability and hydrological connectivity under prolonged below-average rainfall conditions. Although modest recoveries were observed during wetter years, the overall declining trend suggests that longer-term pressures, including urban expansion, land transformation, hydrological modification, and climate change, could be contributing to persistent wetland loss across Cape Town.

SPATIAL TREND (DISTRIBUTION/PATTERN)

On-the-ground observations indicate significant wetland transformation and degradation associated with urban expansion, land invasion, pollution, and hydrological modification.
Key areas affected by wetland loss include:

- Driftsands Nature Reserve and associated wetlands following land invasions during the Covid-19 period;
- Noordhoek wetlands impacted by expansion of informal settlements from Masiphumelele;
- Diep River and Kleine Stink River floodplain wetlands affected by expansion of Dunoon and Doornbach informal settlements;
- Seasonal wetlands within the Slangetjiebos section of the False Bay Nature Reserve; and
- Depression and floodplain wetlands associated with the lower Kuils River and Eerste River.

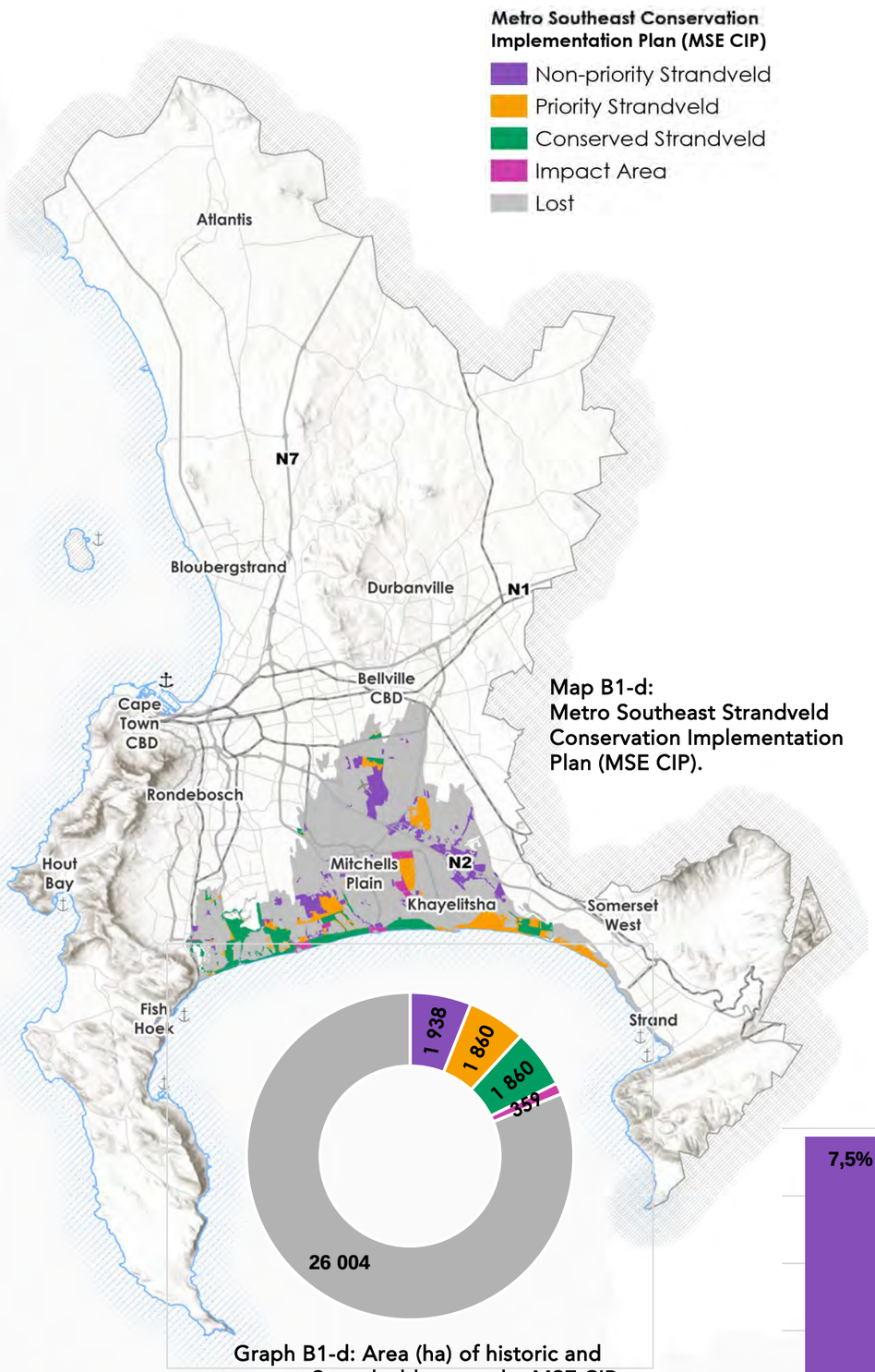
B.1

NATURAL AND AGRICULTURAL ASSETS
BIODIVERSITY NETWORK

2026 Update

This indicator summarises the Metro Southeast Strandveld Conservation Implementation Plan (MSE CIP) and highlights focal areas of interest where significant gains in the proclamation and conservation of the critical biodiversity areas (CBAs) of the BioNet.

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



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

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

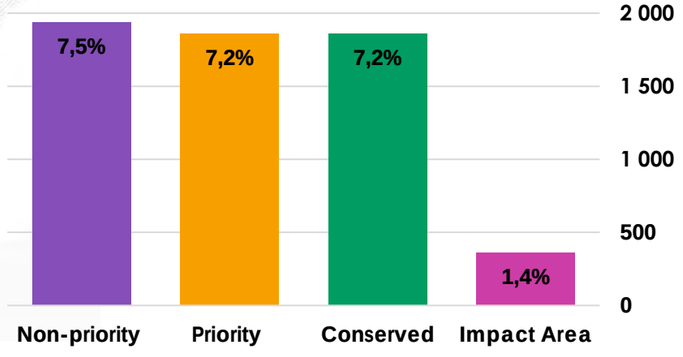
SPATIAL TREND (DISTRIBUTION/PATTERN)

In the southeast, the Metro Southeast Strandveld Conservation Implementation Plan (MSE CIP) focuses on securing a defendable protected area network in a region with many needs and pressures (Map B1-d). This vegetation subtype is found nowhere else in the world but is also in a region under immense pressure for development. Of the historic extent (26 004 ha), only 23% (6 017 ha) of this vegetation subtype is remaining (Map B1-d, Graph B1-d and Graph B1-e). As per the MSE CIP, 7,5% (1 938 ha) has been identified as non-priority Strandveld where development can be considered. However, an additional 7,2% (1 860 ha) has been proactively identified as priority for conservation, with 7,2% (1 860 ha) already formally protected and conserved (Map B1-d, Graph B1-d and Graph B1-e). Notably, approximately 1,4% (359 ha) of the remaining historical extent is considered as impact area - a priority for both conservation and development (Map B1-d, Graph B1-d and Graph B1-e).

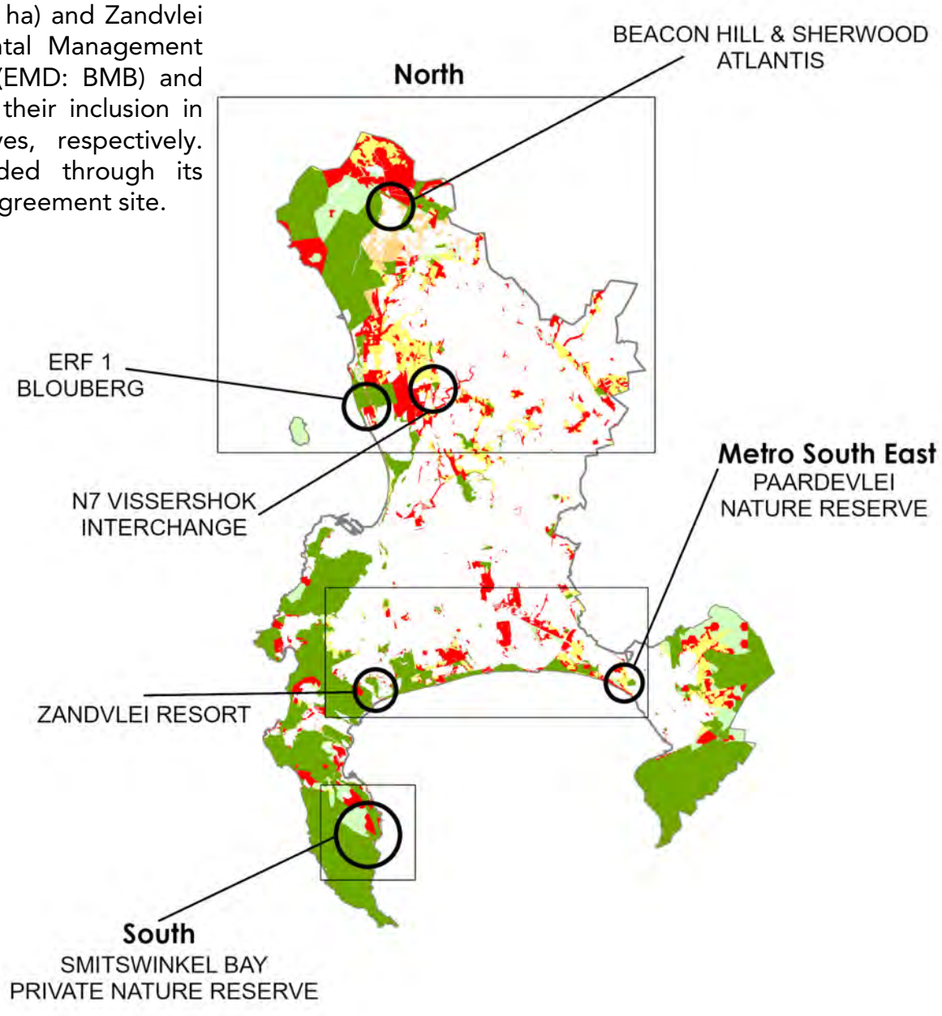
SPATIAL TREND (DISTRIBUTION/PATTERN)

Map B1-e highlights focal areas that have experienced significant change. Since 2024, several smaller protected and conservation areas have been incorporated into Cape Town's conservation estate. Notable additions include Paardevlei (72 ha) and Zandvlei Resort (12. ha), both reserved for Environmental Management Department: Biodiversity Management Branch (EMD: BMB) and managed for biodiversity conservation through their inclusion in the Helderberg and Zandvlei Nature Reserves, respectively. Smitswinkel Bay (26 ha) has also been added through its designation as a private perpetuity biodiversity agreement site.

Minor biodiversity loss has been recorded in northern Cape Town, where areas of natural vegetation classified as Critical Biodiversity Areas (CBA 1a and CBA 1b) and Ecological Support Areas (ESAs) have been transformed due to the formal widening of the N7 and the development of the Vissershok–Van Schoorsdrift interchange (Map B1-e). Similarly, portions of ESA Other Natural Areas (ONA) have been lost to formal residential development within Beacon Hill and Sherwood in Atlantis. This loss has been partially offset by the reclassification of a substantial area of high quality Cape Flats Dune Strandveld on Erf 1 (Blouberg) to CBA 1a status (Map B1-e).



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



Map B1-e: Focal area of interest.

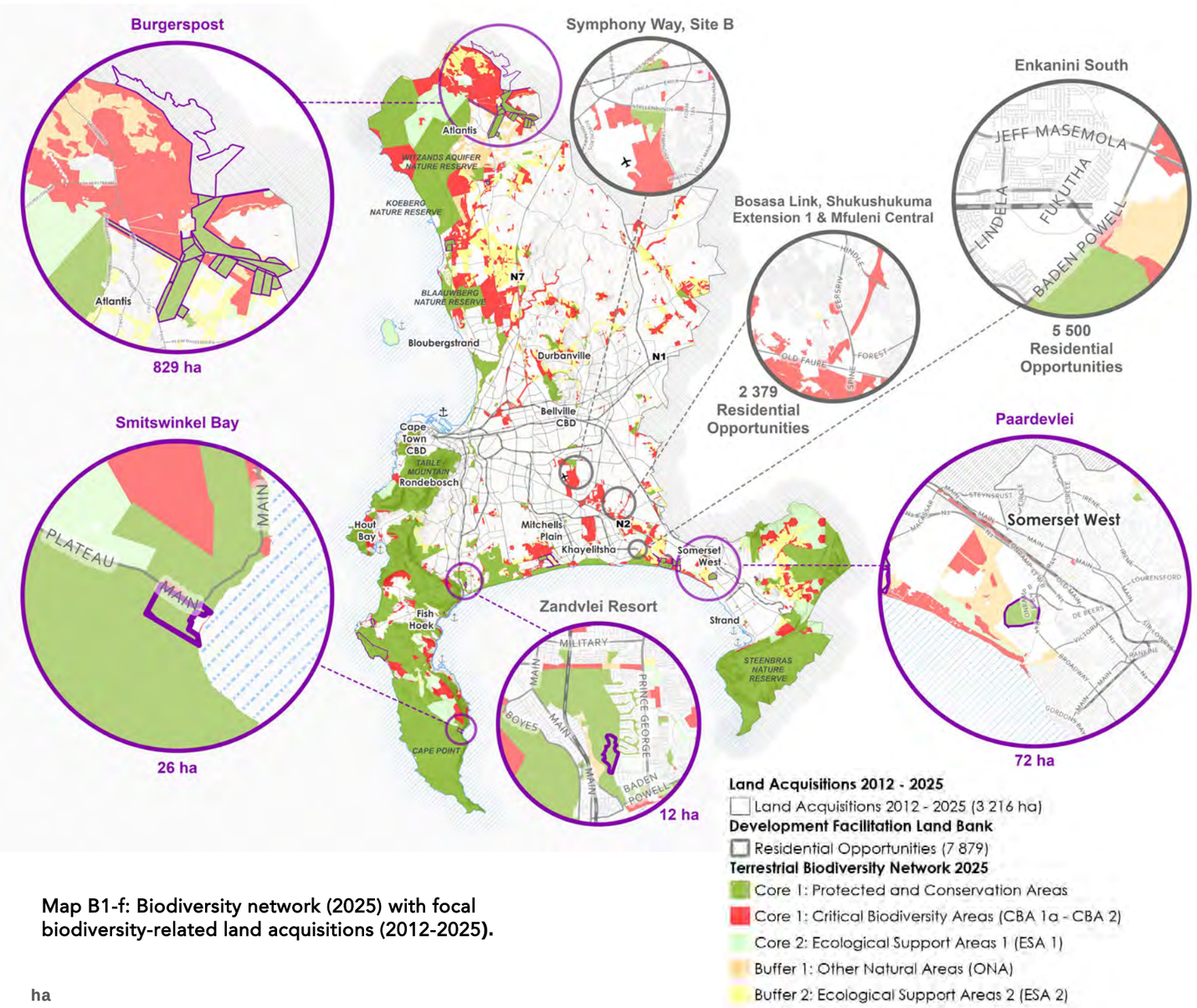
B.1

NATURAL AND AGRICULTURAL ASSETS

BIODIVERSITY NETWORK

This indicator shows biodiversity-related land acquisitions (2012-2025) and development facilitation unlocked as a result of the Macassar East Development Facilitation Land Bank in relation to the terrestrial Biodiversity network.

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

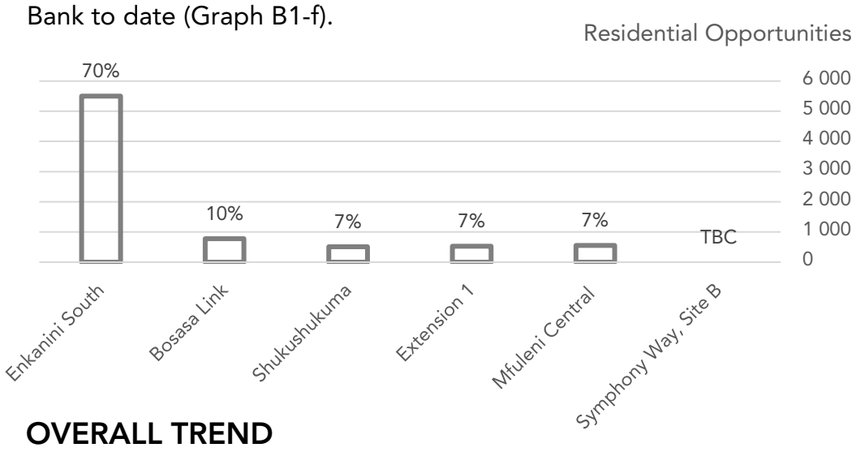


Map B1-f: Biodiversity network (2025) with focal biodiversity-related land acquisitions (2012-2025).

OVERVIEW

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

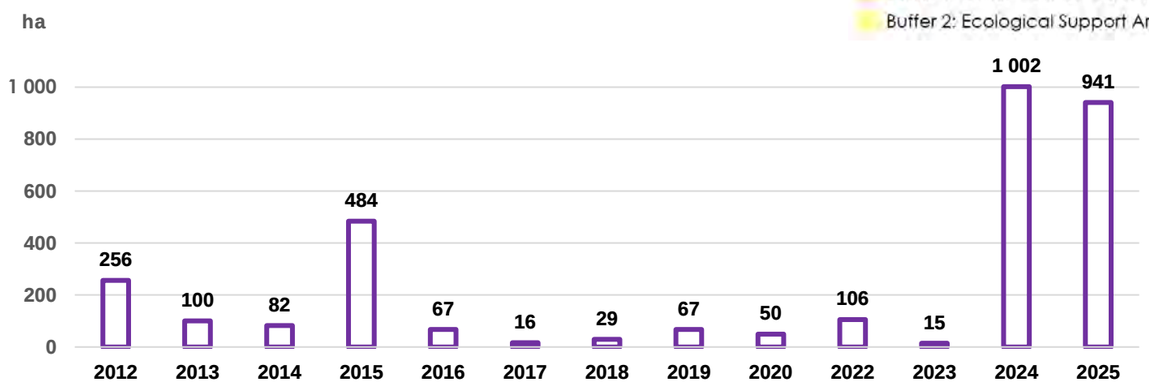
To date, the Macassar East Development Facilitation Land Bank has been extensively used to facilitate development while mitigating the loss of non-priority Strandveld remnants in the Metro Southeast. As a result, ~7 879 residential opportunities across six major development sites were realised (Graph B1-f), while simultaneously contributing to the consolidation and formal protection of the Macassar East Section of Wolfgat Nature Reserve. The Enkanini South development accounted for the majority of residential opportunities unlocked as a result of the Macassar East Development Facilitation Land Bank to date (Graph B1-f).



Graph B1-f: Number and percentage of residential opportunities unlocked as a results of the Macassar East Development Facilitation Land Bank.

OVERALL TREND

Between 2012 and 2025, 3 216 ha of land was purchased by City of Cape Town for conservation. See map B1-f for an illustration of where these sites are located as well as graph B1-g for a breakdown of hectares acquired per year. Additionally, ~7 879 residential opportunities were unlocked as a result of the Macassar East Development Facilitation Land Bank (Graph B1-f). Proactive acquisition of priority biodiversity land in the Atlantis area facilitated the Generic Environmental Management Programme (gEMPr), which removed the clearing of vegetation from environmental authorisation triggers for land within the Atlantis urban edge.



Graph B1-g: Area (hectares) of land acquired for conservation (2012-2025).

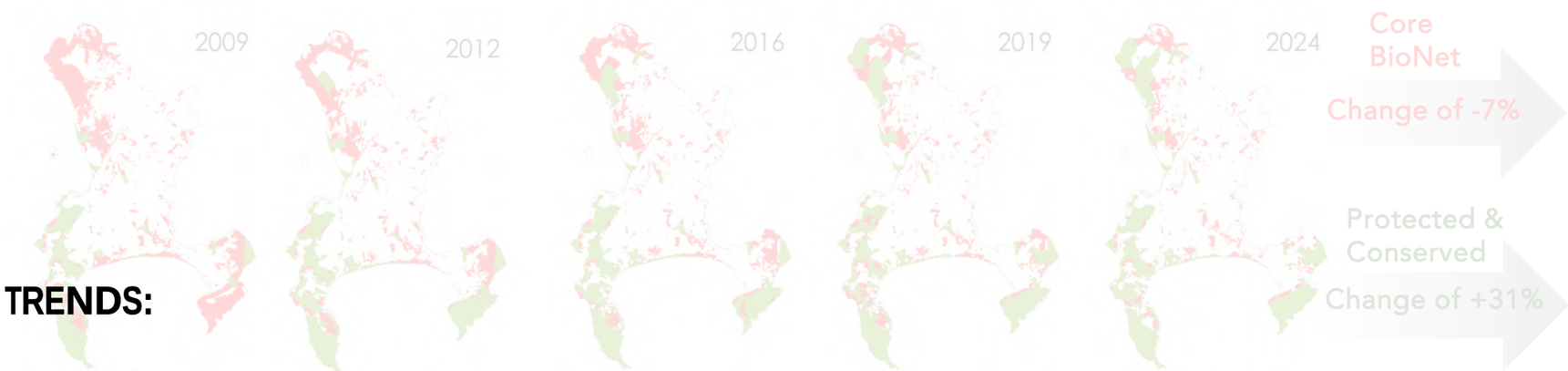
SPATIAL TREND (DISTRIBUTION/PATTERN)

Between 2012 and 2025, land was gradually acquired (Graph B1-g) to expand ecological corridors, including areas northeast of and east of Witzands Aquifer Nature Reserve (WANR). In 2020 and 2022, erven linking Blaauwberg and Koeberg Nature Reserves were secured (Map B1-f). The land includes Endangered Atlantis Sand Fynbos and Swartland Granite Renosterveld. In 2022, erven in Rooi Els (outside Cape Town, near Steenbras) were added. The inclusion of Strandfontein Aquifer and Macassar East Sections consolidates key biodiversity and links to the False Bay Coast via Wolfgat Nature Reserve (Map B1-f). The Imhoff Link and Soetwater Conservation Area gains are fundamental in securing the ecological network on the Cape Peninsula (Map B1-f). Since 2024, an additional 941 ha has secured for formal biodiversity conservation (Map B1-f). Notable additions include Burgerspost (829 ha), Paardevlei (72 ha), Zandvlei Resort (12 ha), Smitswinkel Bay (26 ha), Map B1-f.

BIODIVERSITY NETWORK



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



Map series B1-a: Extent per year of protected and conservation areas, including core biodiversity network areas (CBA 1 -2) i.e. the prioritised remnants of [illegible]. Buffer 2 (ESA 2) 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) compared to the 2009 baseline.

KEY TAKE_AWAY TRENDS:

- **Overall loss of - 7%** of the Cape Town BioNet and **potential loss of - 15%** of wetlands due to authorised and unauthorised land use change between **2009 and 2025.**
- **Significant gain of +30%** of the Cape Town BioNet protected and conserved areas between 2009 and 2025 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.

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).

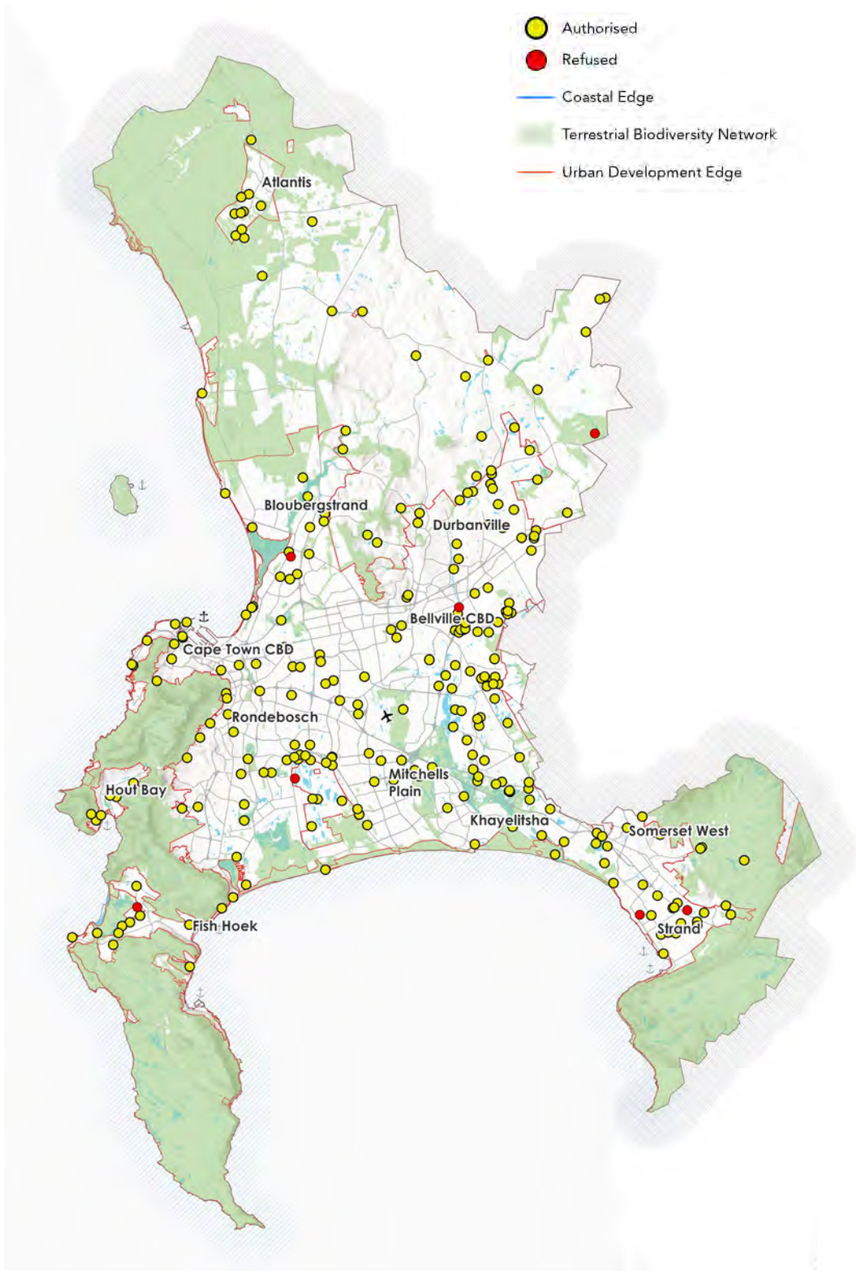
B.2

NATURAL AND AGRICULTURAL ASSETS
EARLY DETECTION - EIAS

2026 Update

This indicator shows the number of **Environmental Impact Assessments** authorised or refused between Jan 2018 and Dec 2025 (**excluding those relating to telecommunication masts and base stations) where 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 2025) authorised or refused

Map B2-a and Graph B2-a are produced using Western Cape Government's spatialised EIA dataset, which has changed following a Quality Assurance (QA) process. 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.

Year	2018	2019	2020	2021	2022	2023	2024	2025
Total EIA Authorised	22	28	34	29	49	35	30	41
Total EIA Refused	0	1	0	1	1	2	1	0

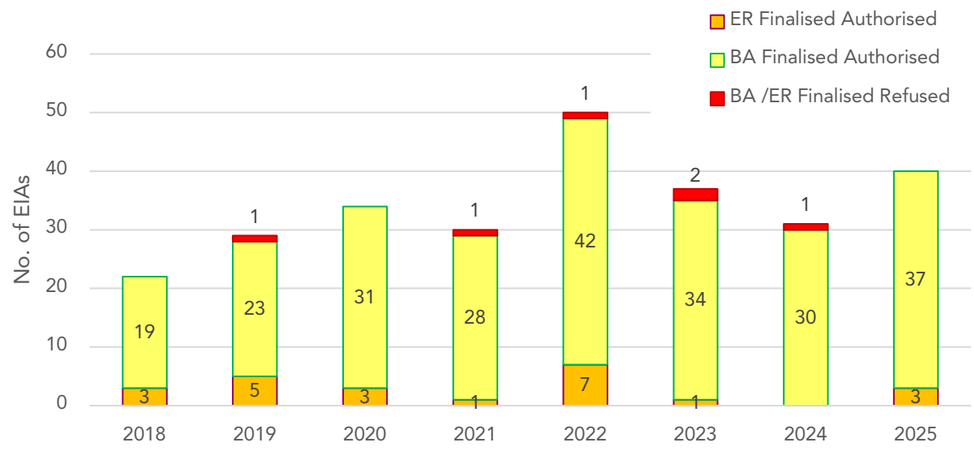
Table B2-a: Total no. of EIAs (January 2018 – Dec 2025) authorised or refused per year

OVERVIEW

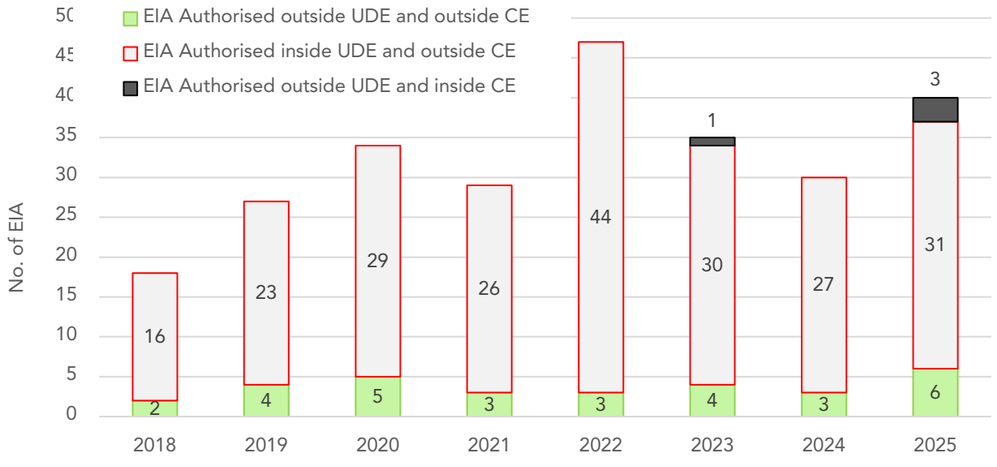
Environmental Impact Assessments (EIAs) are required in terms of the National Environmental Management Act (NEMA) whenever a proposed development may significantly impact the environment, socio-economic conditions and/or cultural heritage of a site. There are two types. Basic Assessments (BAs) are conducted 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 six refused between January 2018 and December 2025 and a total of 268 authorised. Of those authorised, 23 were EIRs and 245 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 2025)



Graph B2-a: No. of EIAs (BAs + EIRs) authorised (Jan 2018 – Dec 2025) 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.

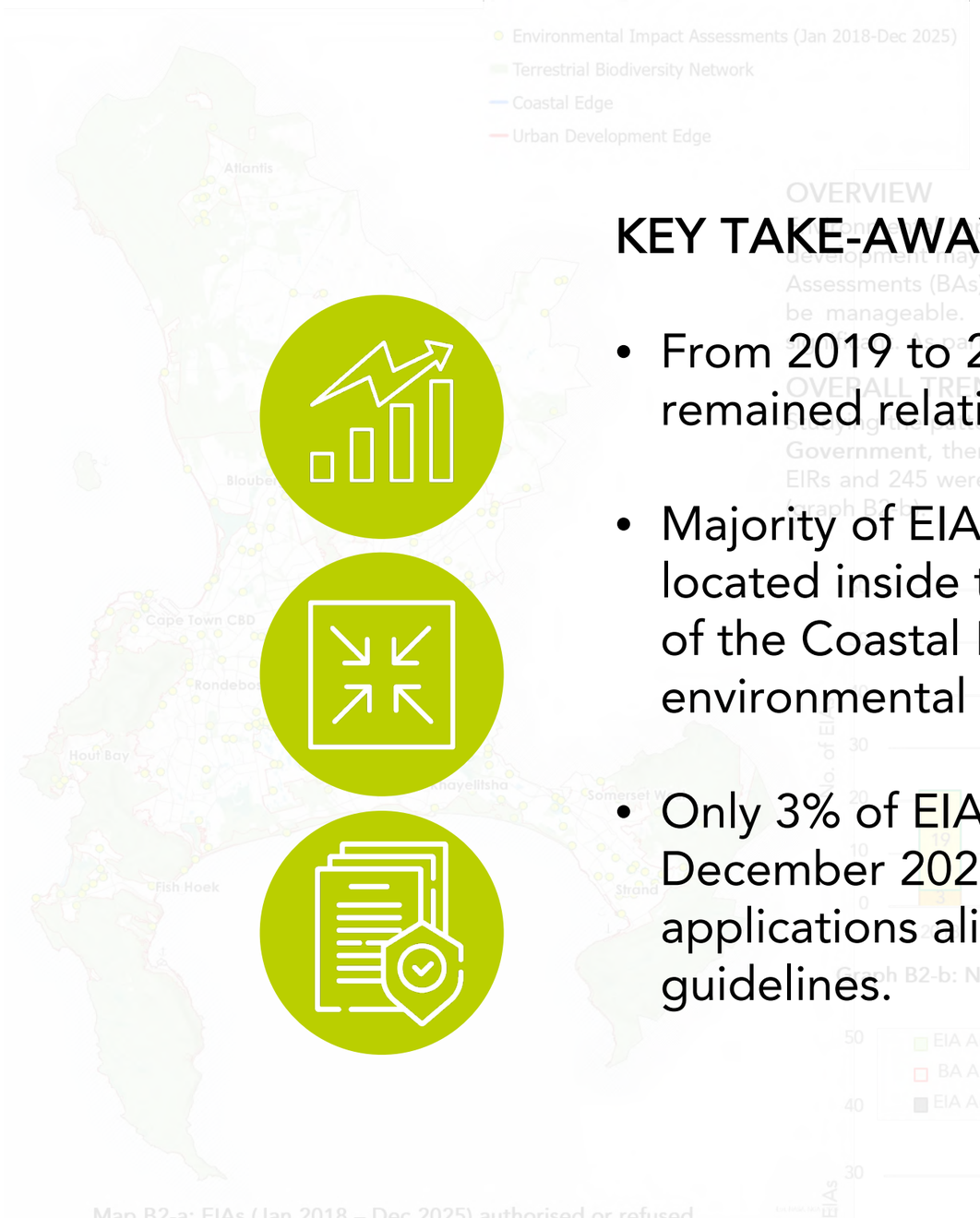
SPATIAL TREND (DISTRIBUTION/PATTERN)

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 Northen 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 Bellville, 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 in Strand.

EARLY DETECTION - EIAS



Map B2-a: EIAs (Jan 2018 – Dec 2025) authorised or refused

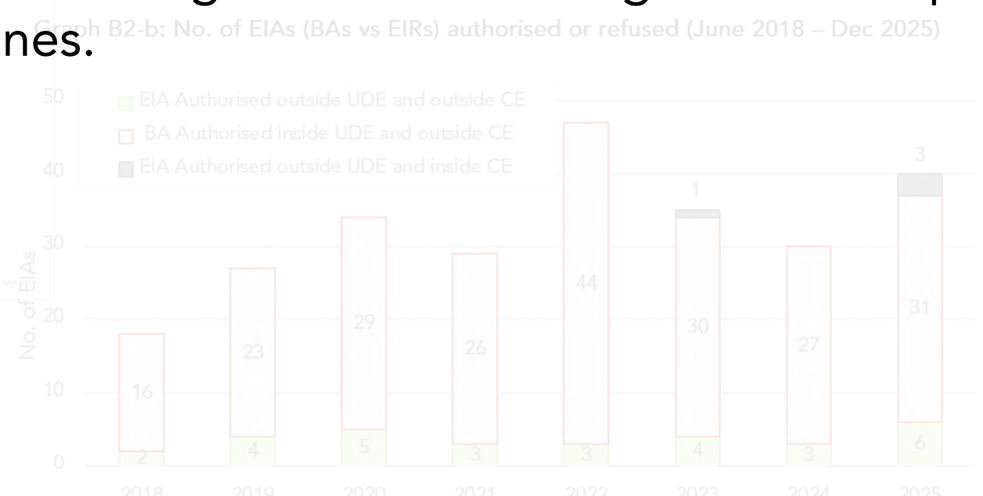
Map B2-a and Graph B2-a are produced using Western Cape Government's spatialised EIA dataset, which has changed following a Quality Assurance (QA) process. Appeals & amendments are not captured in the data.
Table B2-a and Graph B2-b are produced using Western Cape's EIA Excel database extract as it contains additional attributes that are not currently available in the spatialised data.

KEY TAKE-AWAY TRENDS

- From 2019 to 2025 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 (6) between January 2018 and December 2025 were refused, suggesting that most applications align with relevant legislative and policy guidelines.

Year	2018	2019	2020	2021	2022	2023	2024	2025
Total EIA Authorised	22	28	34	29	49	35	30	41
Total EIA Refused	0	1	0	1	1	2	1	0

Table B2-a: Total no. of EIAs (January 2018 – Dec 2025) authorised or refused per year



Graph B2-a: No. of EIAs (BAs + EIRs) authorised (Jan 2018 – Dec 2025) inside/outside of the Urban Development Edge (UDE) and/or seaward/landward of the Coastal Edge (CE)

OVERVIEW

(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. Appropriate measures can then be developed to ensure that they are kept at acceptable levels and to monitor them.

OVERALL TREND

Graph B2-b: No. of EIAs (BAs vs EIRs) authorised or refused (June 2018 – Dec 2025)

In terms of **EIAs evaluated by Western Cape Government**, there were six refused between January 2018 and December 2025 and a total of 268 authorised. Of those authorised, 23 were EIRs and 245 were BAs. Between 2019 and 2023, the number of EIAs authorised has remained relatively constant other than a peak in 2022 (graph B2-a).

If the planning policies and strategies are working, the expectation is that authorisations for sites located seaward of 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 Northen region has had the highest concentration of EIAs authorised.

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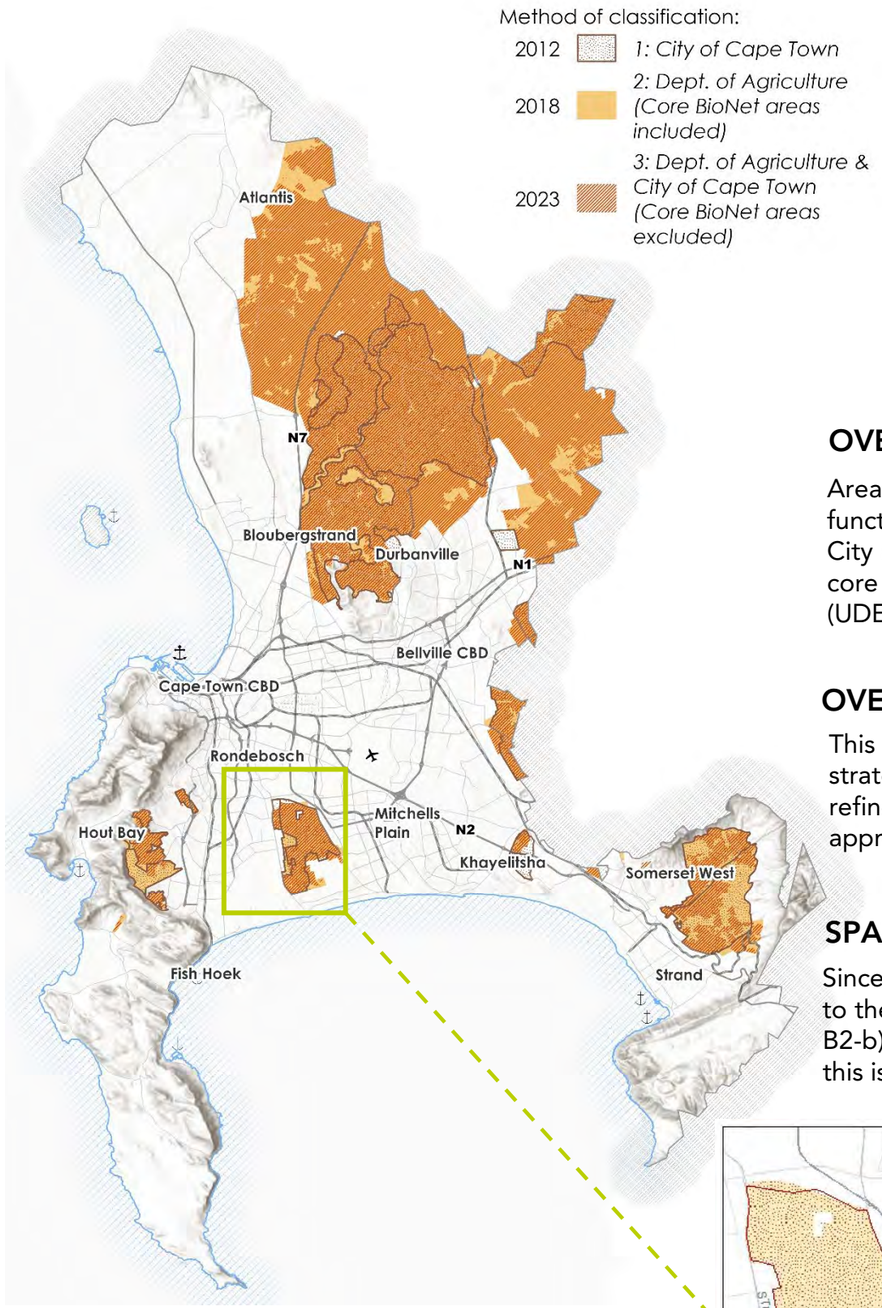
B.3

NATURAL AND AGRICULTURAL ASSETS

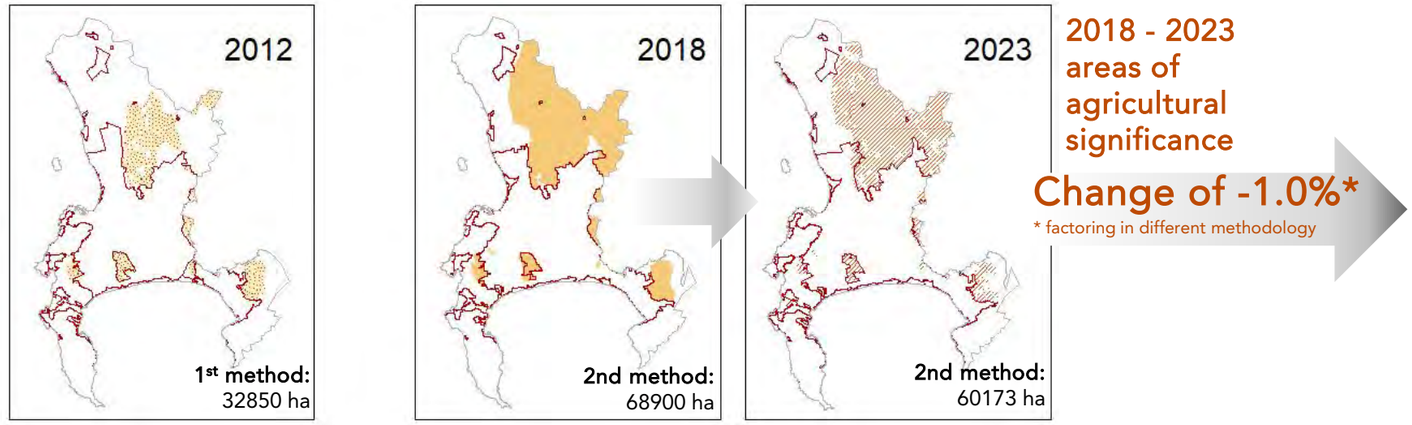
AREAS OF AGRICULTURAL SIGNIFICANCE

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

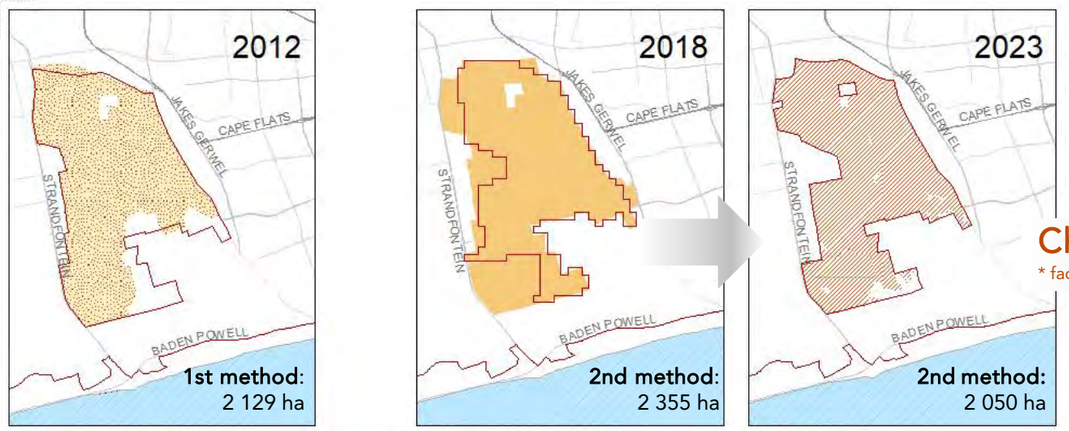
Areas of agricultural significance have unique production, cultural and heritage attributes and are critical for food security and ecosystem function. In 2012, areas of agricultural significance were identified by City of Cape Town based on soil potential only (map B2-a). In 2018, the City and Western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

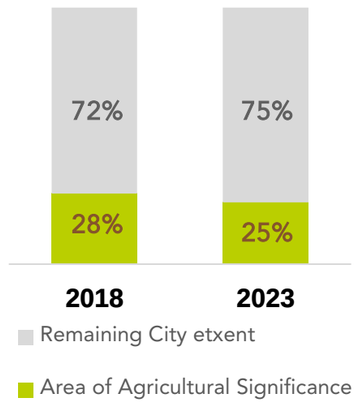
This indicator helps to determine the pace at which agricultural areas are being consumed by other land uses and whether City policies and strategies to preserve them are effective. Roughly 607 ha of the loss and 766 ha of the gain between 2018 and 2023 can be attributed to more refined data capturing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



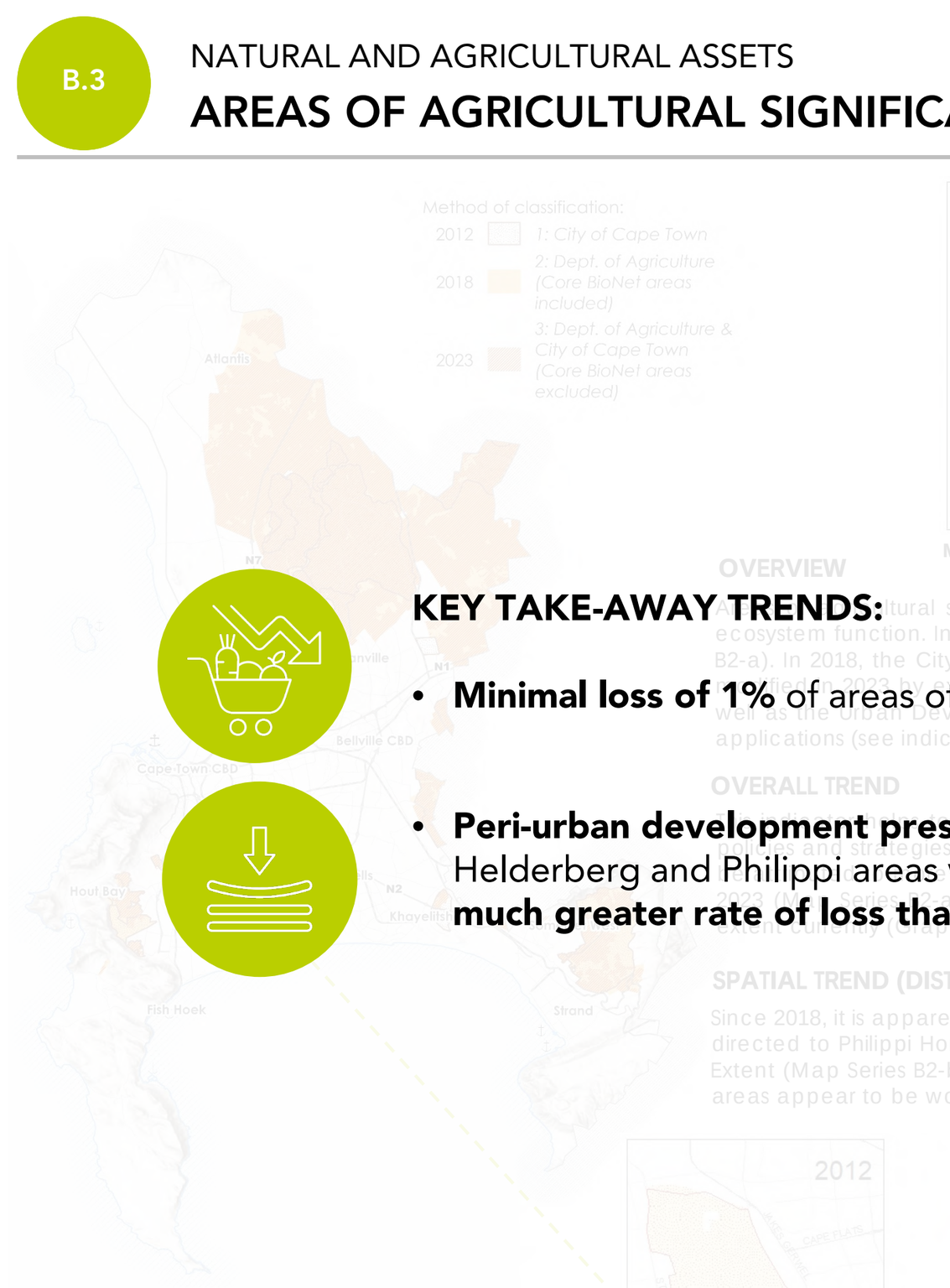
Map series B2-b:
Area (hectares) of Philippi horticultural area of agricultural significance per year – with urban development edge



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

NATURAL AND AGRICULTURAL ASSETS

AREAS OF AGRICULTURAL SIGNIFICANCE



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

KEY TAKE-AWAY TRENDS:

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

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

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

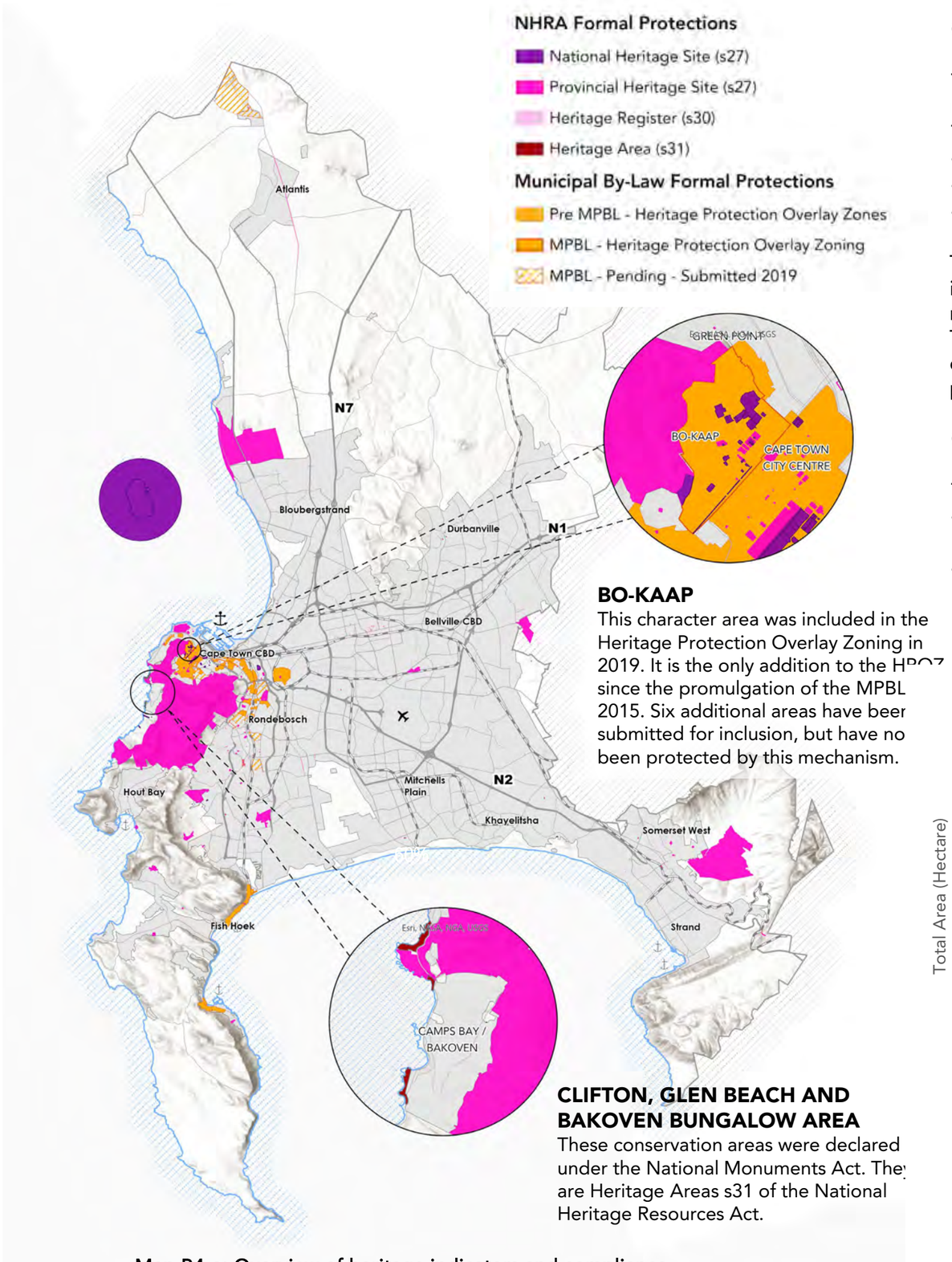
B.4

HERITAGE MANAGEMENT & LEGISLATIVE COMPLIANCE

HERITAGE PROTECTION MECHANISMS

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 2015. Six additional areas have been submitted for inclusion, but have not 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:

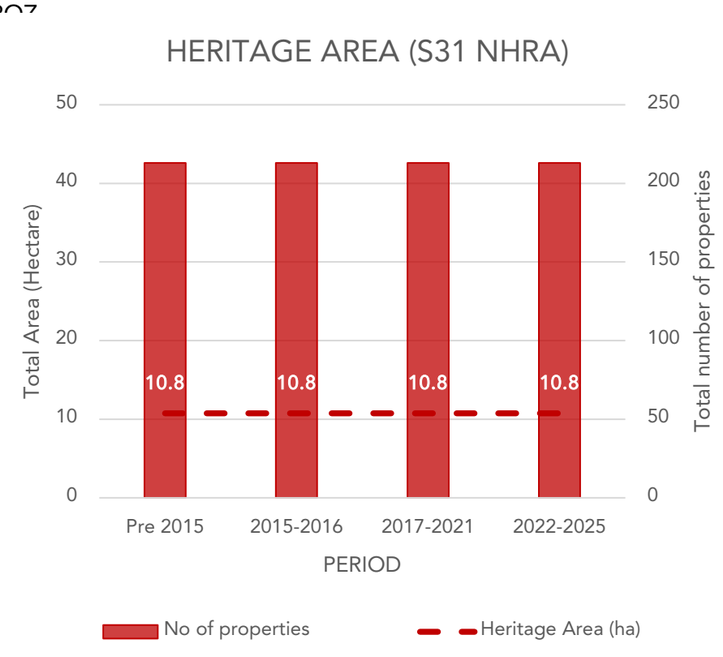
- Grade I: National Heritage Site, managed by the South African Heritage Resources Agency (SAHRA)
- Grade II: Provincial Heritage Site managed by Heritage Western Cape (HWC)
- Grade III: Local heritage resource, envisioned to be managed by the competent Local Authority (i.e. City of Cape Town)

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.

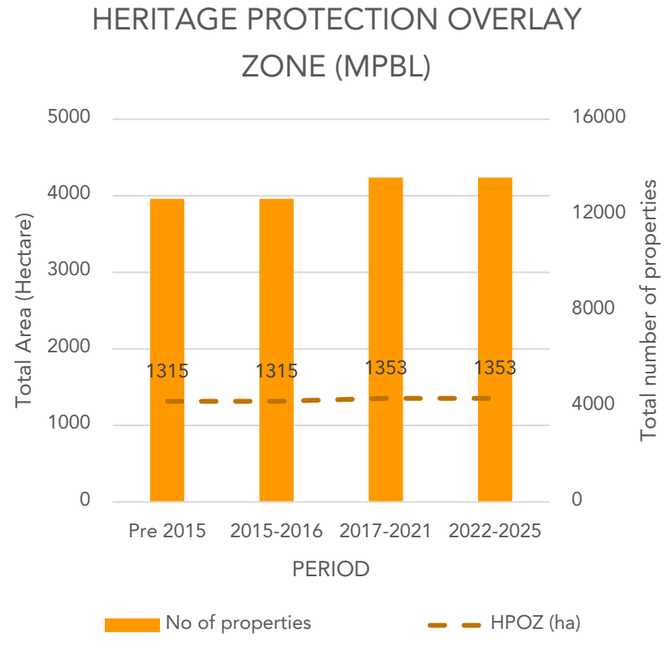
OVERALL TREND

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).

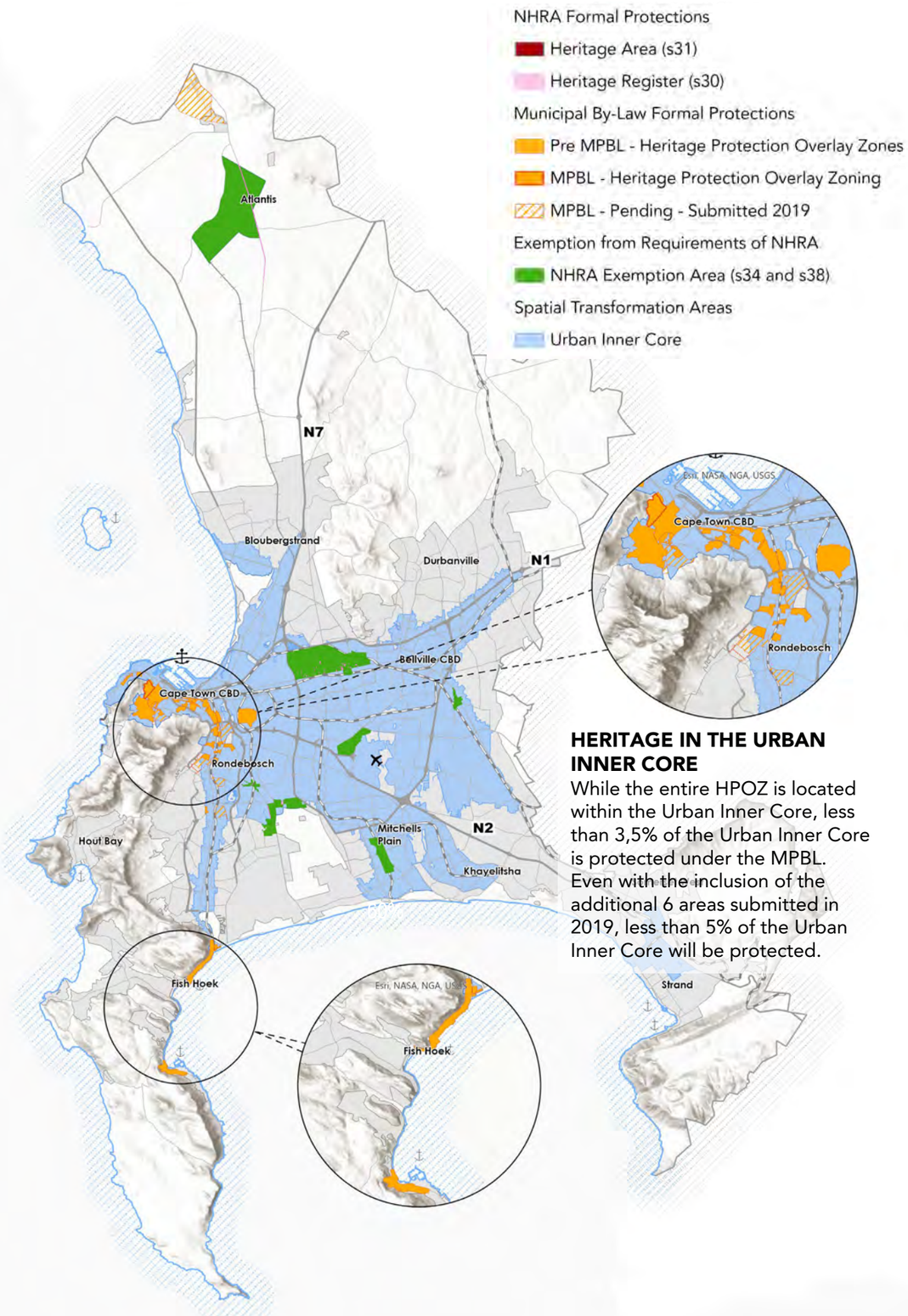
B.4

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.

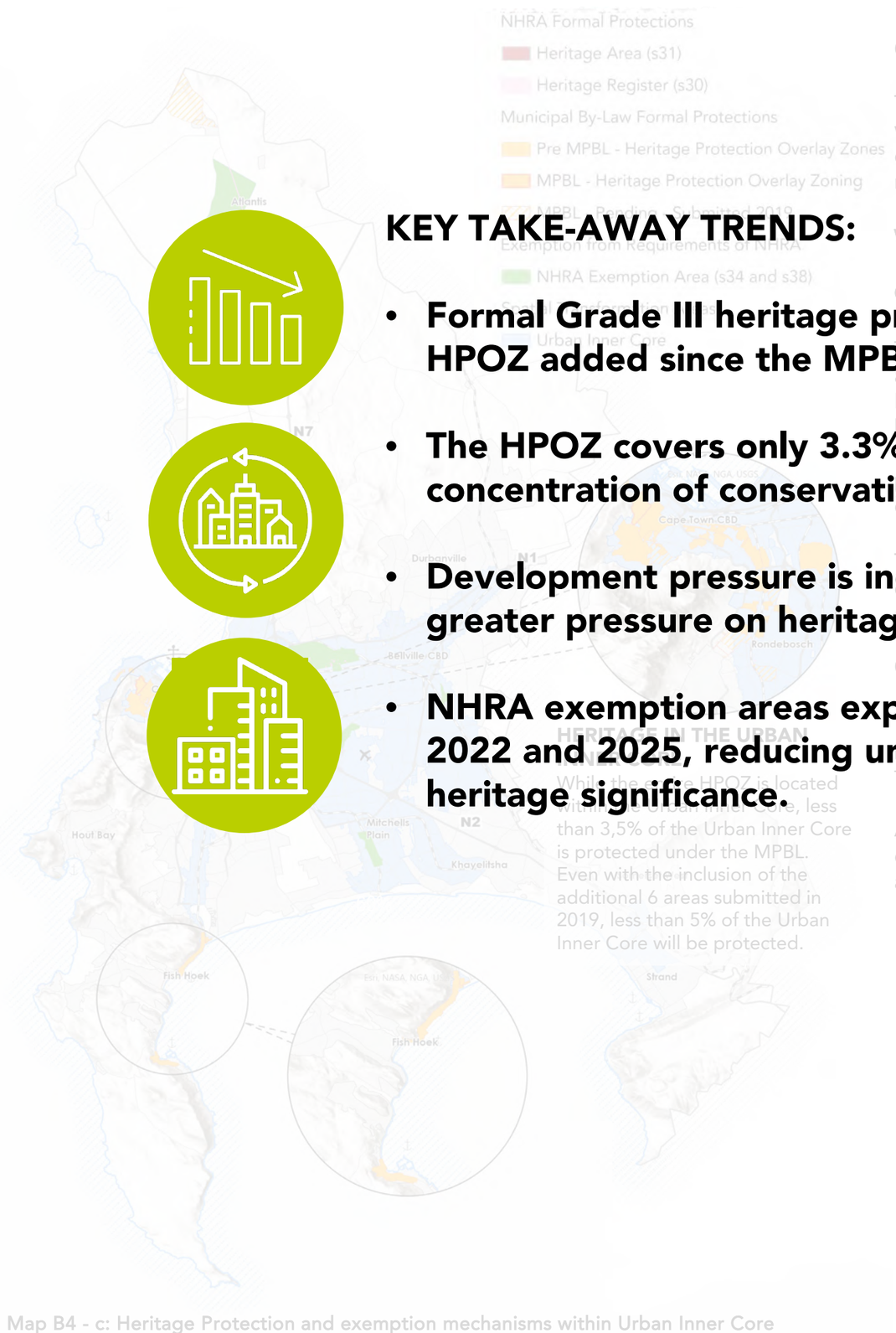
	HPOZ	Heritage Area s31	Heritage Register s30	NHRA Exemption s34 and s38
Urban Footprint (97 272,48 ha)	1,4%	0,01%	0,05%	4,4%
Urban Inner Core (41 371,21 ha)	3,3%	0%	0,11%	10,1%
TOTAL (ha)	1 382,67	10,75	46,44	4 259,8

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.

HERITAGE AND THE URBAN FOOTPRINT

KEY TAKE-AWAY TRENDS:

- **Formal Grade III heritage protection has expanded very little, with only one new HPOZ added since the MPBL was promulgated.**
- **The HPOZ covers only 3.3% of the Urban Inner Core, but contains a high concentration of conservation-worthy heritage resources.**
- **Development pressure is increasing in well-located heritage areas, placing greater pressure on heritage conservation.**
- **NHRA exemption areas expanded from about 31ha to over 4 200ha between 2022 and 2025, reducing unnecessary heritage processes in areas of lower heritage significance.**



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

HERITAGE IN THE URBAN FOOTPRINT

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.

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The City is desirous of redressing the spatial imbalances resulting from apartheid town planning practices through creating greater opportunities in 'well located areas' for communities who have experienced Forced Removals. Various mechanism are being used 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 development pressure is placing the 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.

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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 (2026 Update + New)
C4 : Non-residential change in land use (2026 Update + New)
C5 : Diversity of use (2026 Update)
C6 : Building plan submissions and completions
C7 : Change in property value (2026 Update)

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

C.1

LAND AND BUILDING DEVELOPMENT

GROSS RESIDENTIAL DENSITY, 2025

This indicator shows gross residential density (number of residential dwelling units per hectare - du/ha) estimated in the City's Land Use Model, 2025. This includes formal (conventional), less-formal (incremental) and informal dwellings. Data is aggregated by using a square grid comprised of 4ha (200m x 200m) grid cells.

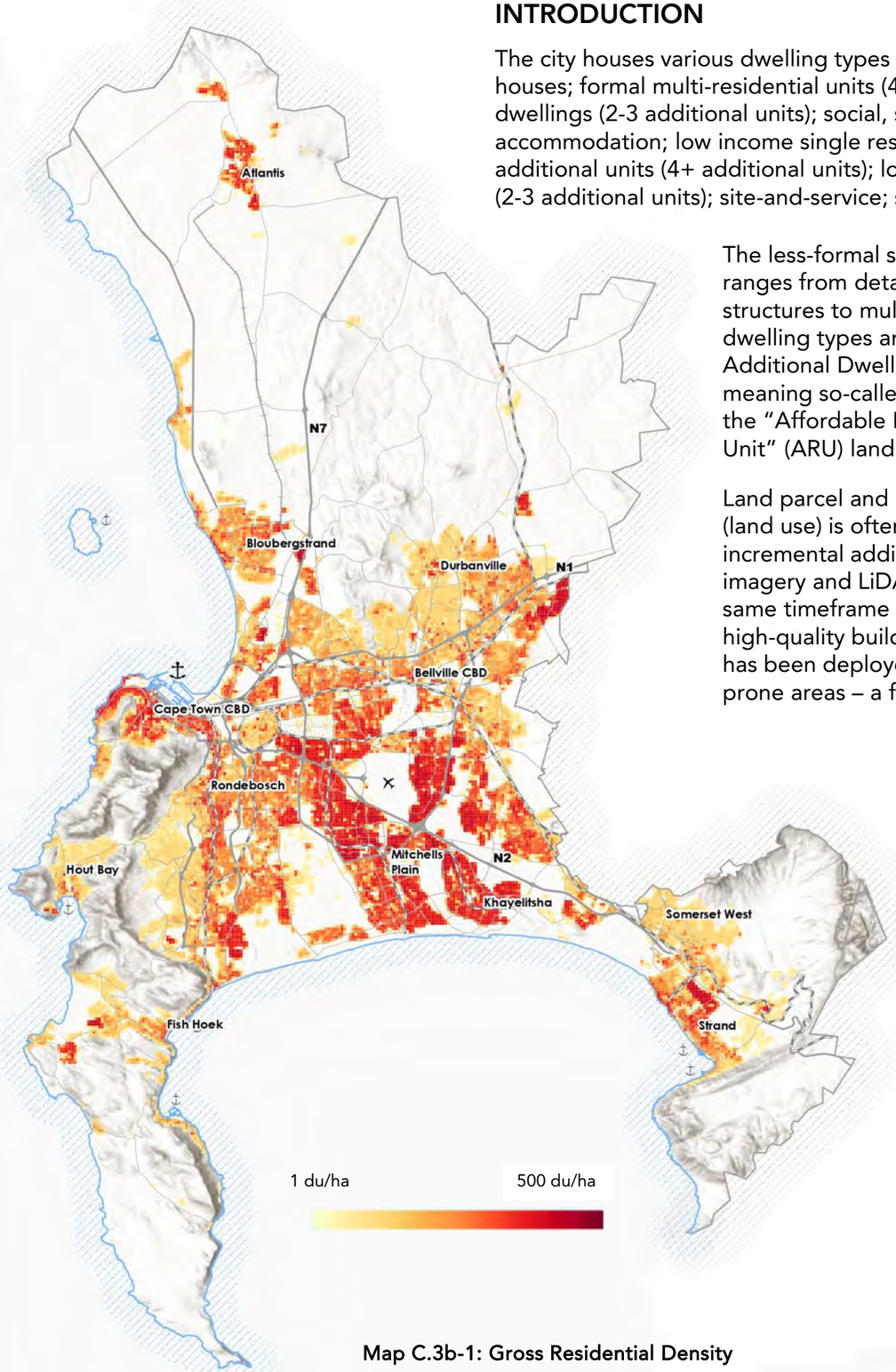
2026 New

INTRODUCTION

The city houses various dwelling types such as market-supplied freestanding houses; formal multi-residential units (4+ additional units), formal additional dwellings (2-3 additional units); social, student and institutional accommodation; low income single residential units; low-income, high-density additional units (4+ additional units); low income, low-density additional units (2-3 additional units); site-and-service; structures in an informal settlement.

The less-formal secondary development component ranges from detached rooms and freestanding backyard structures to multi-storey, multi-unit buildings. These dwelling types are collectively referred to as "Incremental Additional Dwellings" (IADs). It includes within its meaning so-called "Small-scale Rental Units" (SSRUs) and the "Affordable Rental Flat" (ARF) / "Affordable Rental Unit" (ARU) land use introduced in the MPB-L.

Land parcel and building-level data on the use of space (land use) is often inaccurate in respect of these incremental additional dwellings. The availability of aerial imagery and LiDAR data for the whole city and for the same timeframe has enabled the automated extraction of high-quality building footprints and building heights, and has been deployed in incremental additional dwelling prone areas – a first of its kind approach.



Map C.3b-1: Gross Residential Density

SPATIAL DISTRIBUTION

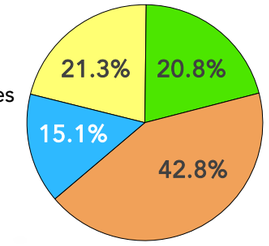
Gross residential density – *Map C-1* depicts the spatial distribution and concentration of dwelling units. The average consolidated residential density across the metro is 46.28 du/ha.

Composition of residential typologies – *Map C-2* shows the dwelling type based on the predominance of simple, density-related residential classes – classified at land parcel level – at a 4-ha aggregated level. The unit types are:

- Single Residential (1 DU),
- Intermediate Residential (1 + 2-3 DUs) Multi-Residential (4+ DUs).

By comparing the two maps, it is clear that density and residential typologies are related. The concentration of residential units is the spatial outcome of an intricate interplay between desirability, accessibility and affordability.

Graph C3b-1: Contribution of residential typologies to the total number of dwelling units.



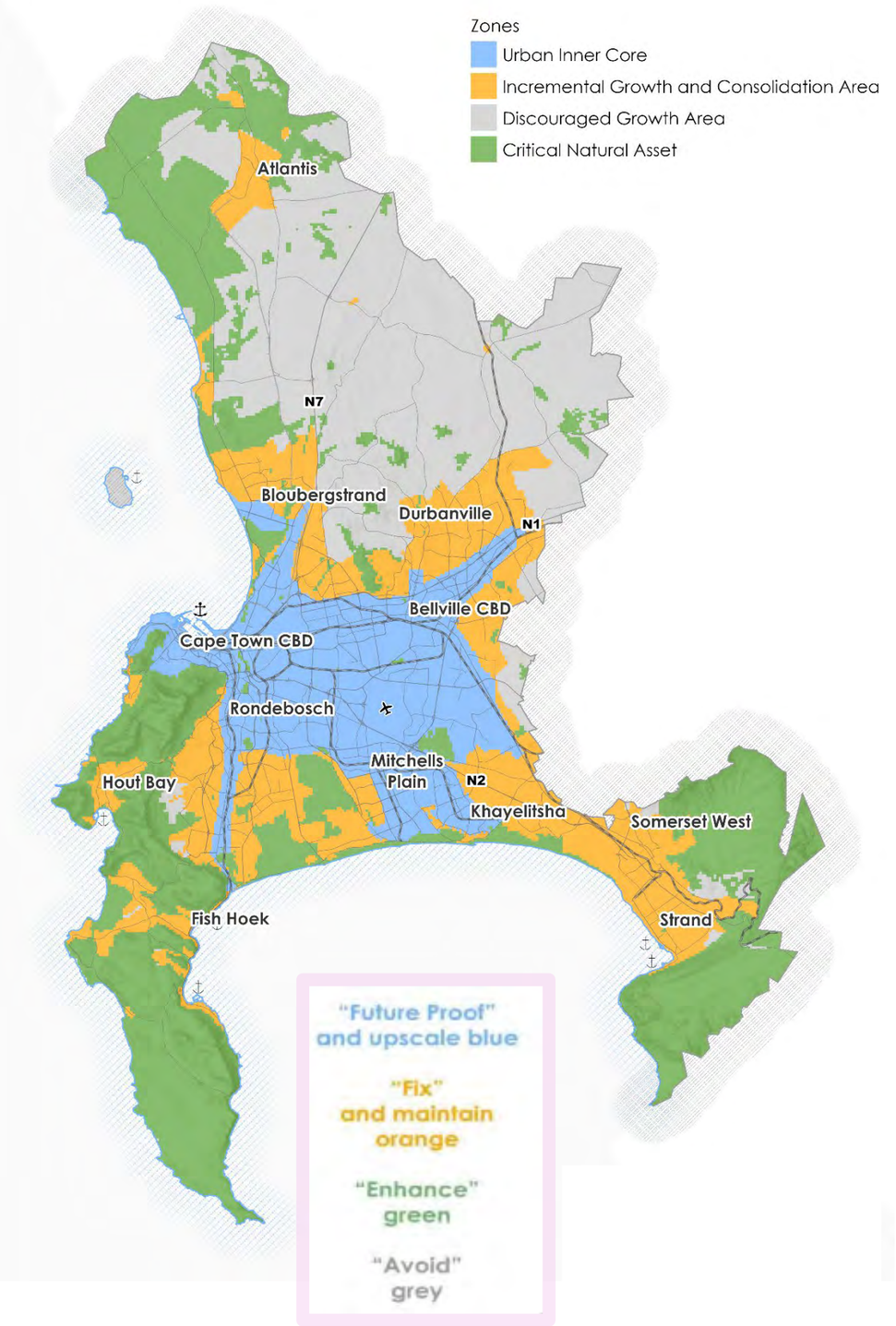
Map C-3b-2: Predominant Dwelling Typology

C.2

LAND AND BUILDING DEVELOPMENT
RESIDENTIAL DENSITY WITHIN SPATIAL TRANSFORMATION AREAS

This indicator shows the **gross residential density** as captured in the General Valuations (GV) Roll (**formal only**) (2018, 2022 & 2025) and in the 2025 Land Use Model (**all typologies**) 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 form the basis of spatial targeting in the MSDF (2023) with the aim of prioritising areas for public and private investment. They 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, and 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. Each of these is linked to a set of development rules with suitable land uses promoted within each based on investment principles:

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

New residential development is encouraged within the UIC and IGCAs based on infrastructure capacity. It is discouraged/prohibited outside of the Urban Development Edge in the DGAs and where there are CNAs.

OVERALL TREND

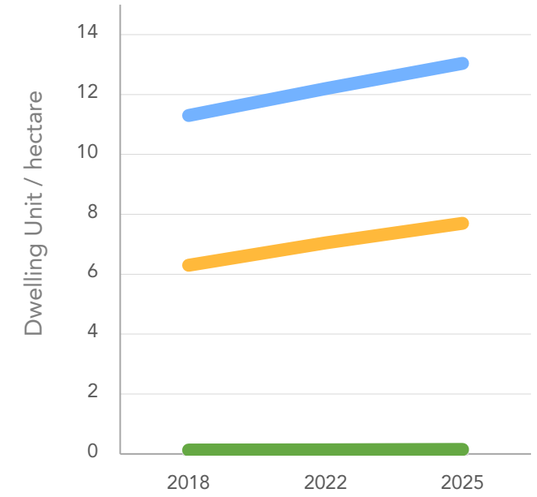
This study of the residential density per zone helps us to understand whether City policies and strategies to shape the City's growth and contain urban sprawl are effective. Residential density is highest in the zones designated for residential land use - UIC and IGCA – and very low in the zones designated for other land uses - DGA and CNA.

Graph C1-a includes a comparison of formal residential densities as per the past three General Valuation (GV) Rolls. From the GV data (formal only) between 2018 and 2025, it is evident that there is a gradual increase in densities in the UIC and IGCA zones, with UIC densities almost twice those in the IGCA zone.

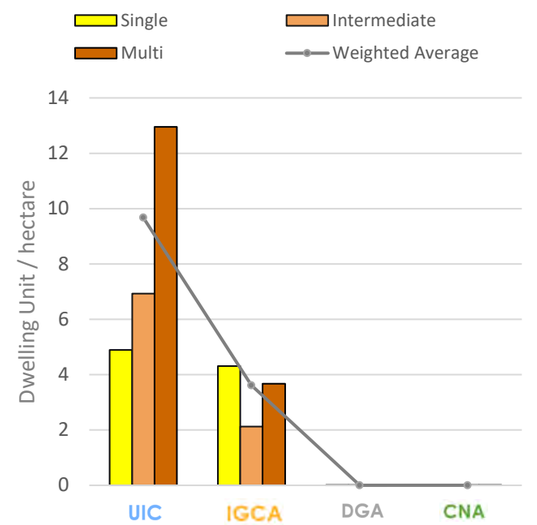
The recently available Land Use Model includes the more informal residential areas not captured in the GV data (see panel C1.a) but only for 2025 (Graph C1-b). Densities are highest in the UIC where the dominant typology is 'multi' i.e. where there are 4 or more dwellings on the erf, typically in the form of flats, boarding hostels and so on. In the IGCA, there is more of a balanced mix of 'multi, 'intermediate' - where there is 1 to 3 dwellings on the erf including the main dwelling, and 'single' residential - where there is a single dwelling in on the erf.

SPATIAL TREND (DISTRIBUTION/PATTERNS)

Formal residential density increased by approximately 1.7 du/ha in the UIC (15%) and 1.4 du/ha in the IGCA (22%) between 2018 to 2025. Trends over time that include informal residential areas will be monitored in future when updates to the Land Use Model become available.



Graph C1-a: 2025 gross residential density per 2023 STA zone – formal only
[Source: General Valuation Roll]



Graph C1-b: 2025 gross residential density per hectare per 2023 STA zone – all typologies
[Source: Land Use Model]

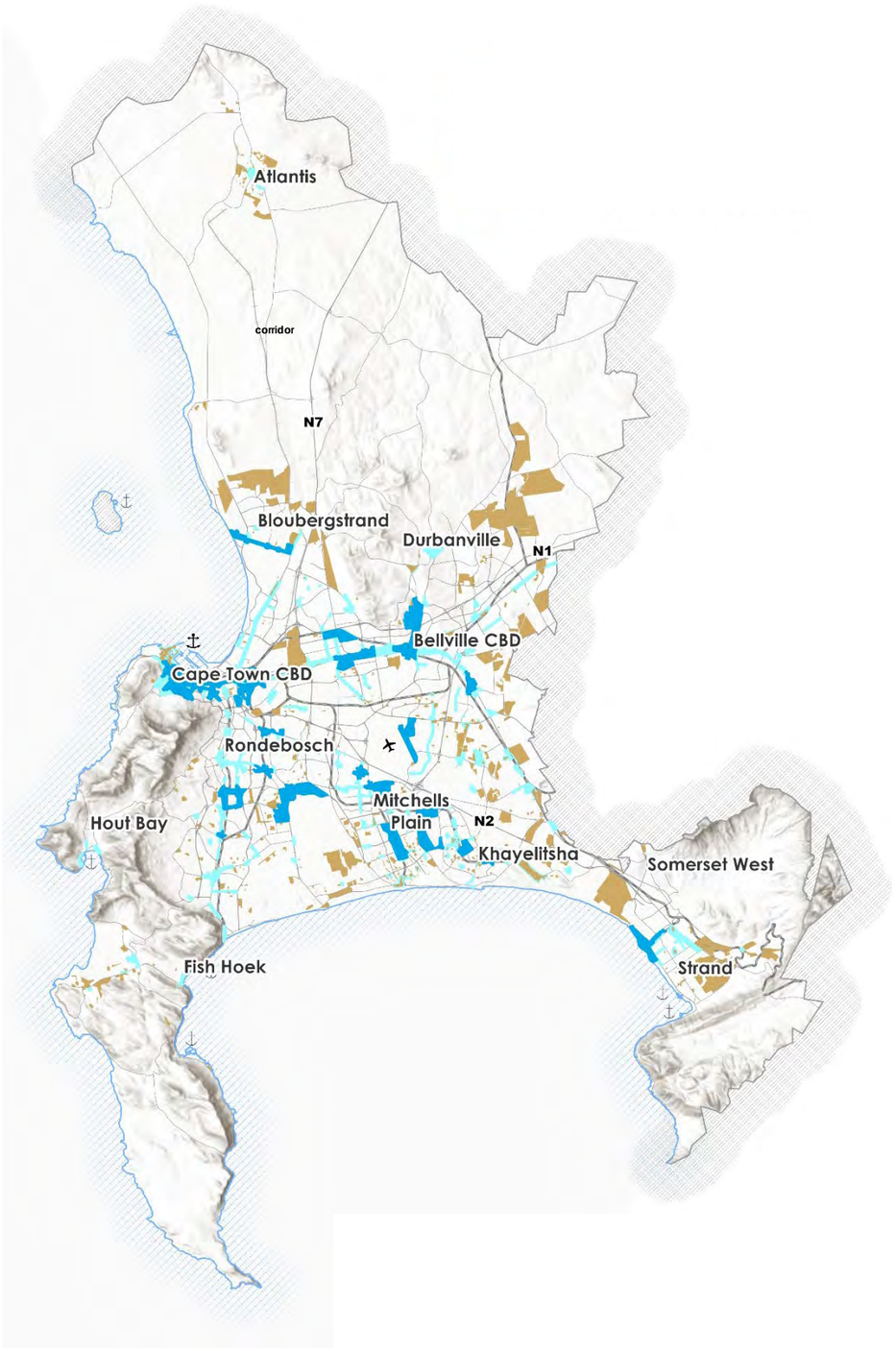
C.2

LAND AND BUILDING DEVELOPMENT

RESIDENTIAL DENSITY WITHIN SPATIALLY TARGETED AREAS

This indicator shows the **gross residential density** as captured in the General Valuations (GV) Roll (**formal only**) (2012, 2015, 2018, 2022, 2025) and in the 2025 Land Use Model (**all typologies**) 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 (SDFs) target particular areas for development, known collectively as the "**Spatially Targeted Areas**" (map C2-a). These include the following categories **where policy would currently support residential development**:

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

The Spatially Targeted Areas are the result of fine-scale planning for development within the broader Urban Extent (see *indicator A.1 and refe*r to the *Key Terms and Definitions* section in this 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, 2022 and 2025, the 2023 Spatially Targeted Areas were used as the spatial unit as their boundaries were delineated for the 2023 SDFs.

OVERALL TREND

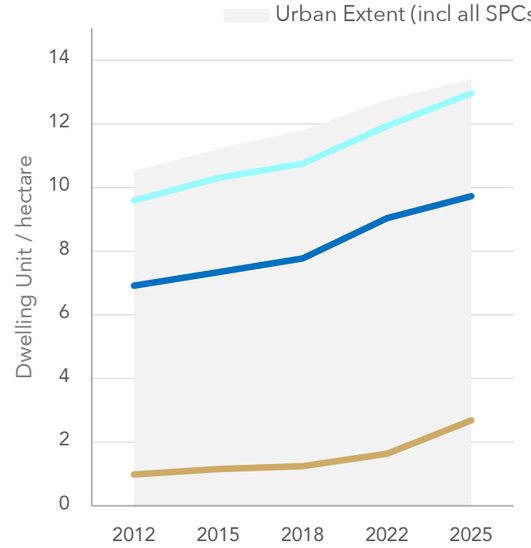
The aim is to understand whether programmes to increase residential density in these targeted areas are leading to actual results. Between 2012 and 2025, there was a gradual increase in formal residential density in all of these Spatially Targeted Areas with the rate at which that took place increasing in 2018 (Graph C2-a).

The recently available Land Use Model includes the more informal residential areas not captured in the General Valuations data but only for 2025 (Graph C2-b). Densities are highest in the MUIAs and the dominant typology in the MUIAs and DFAs is 'multi' i.e. where there are 4 or more dwellings on the erf, typically in the form of flats, boarding hostels and so on. 'Single' residential is where there is a single dwelling in on the erf and 'intermediate' is where there is 1 to 3 dwellings on the erf including the main dwelling. The trends over time will be monitored when updates become available.

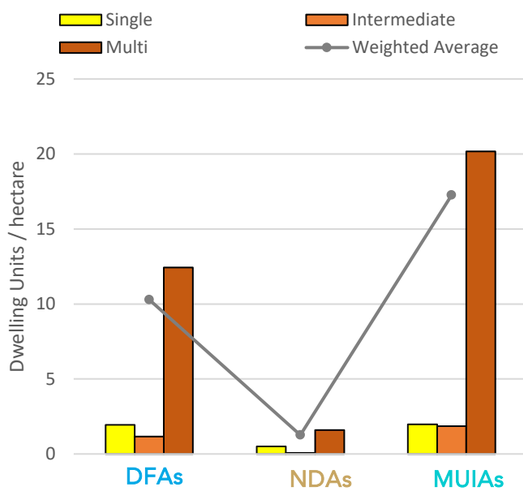
SPATIAL TREND (DISTRIBUTION/PATTERNS)

Since the delineation of the areas depicted in Map C2-a, residential densities within them are expected to increase at a greater rate in the coming years than in neighbouring areas because of a general increase in densities of newly approved and implemented projects. In particular, in the NDAs, which have a lower residential density than the MUIAs and the DFAs currently (Graph C2-a and C2-b).

Note that where MUIA boundaries were found to overlap NDA boundaries, the overlaps were removed for this analysis to avoid distorting the results. The preparation of the indicator data has therefore also been useful for informing the review and delineation of Spatially Targeted Areas in the future.



Graph C2-a: 2012 - 2025 gross residential density per 2023 spatially targeted area – formal only [Source: General Valuations Roll]



Graph C2-b: 2025 gross residential density per 2023 spatially targeted area – all typologies [Source: Land Use Model]

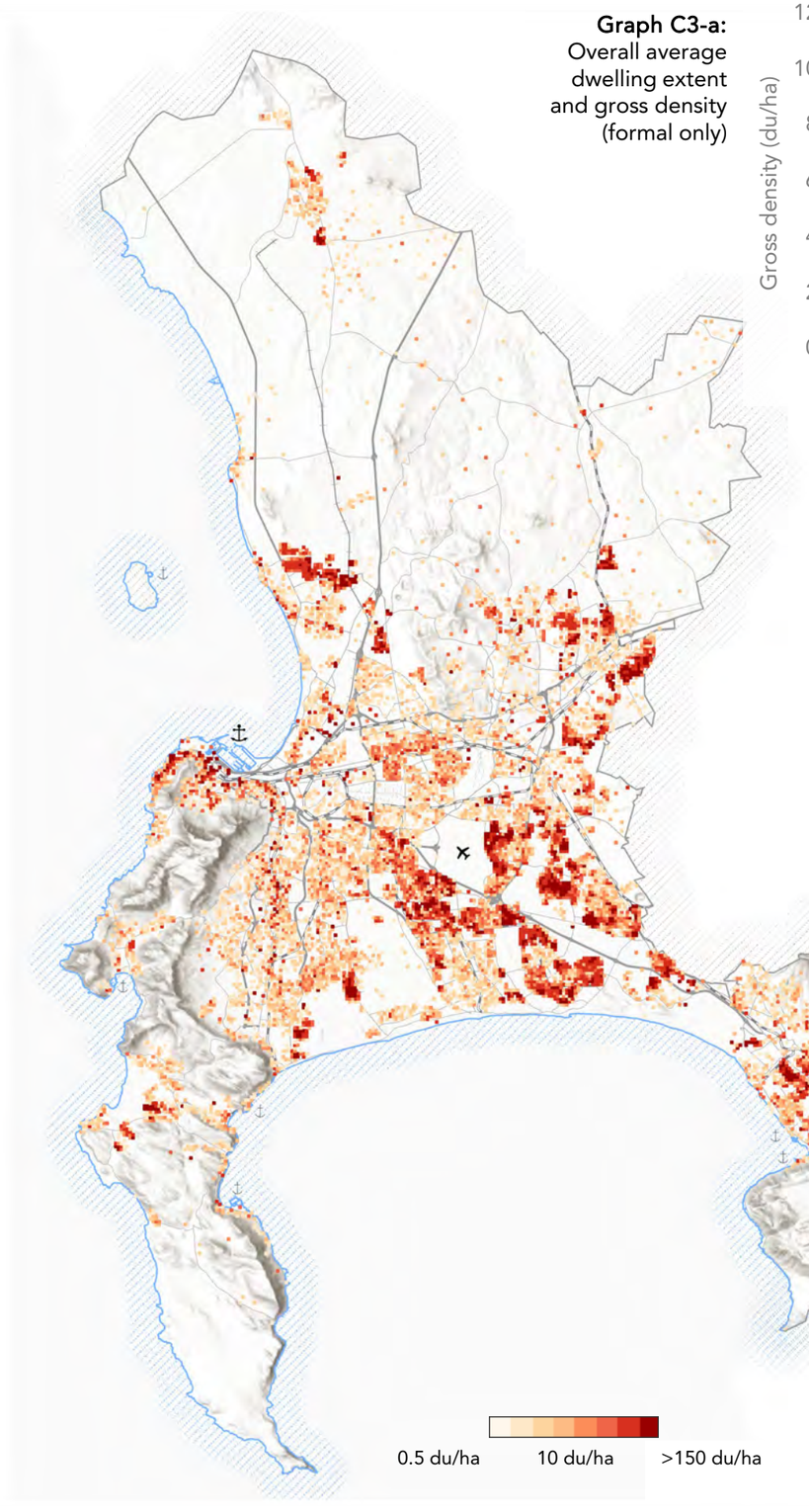
C.3

LAND AND BUILDING DEVELOPMENT
FORMAL RESIDENTIAL DENSITY

2026 Update

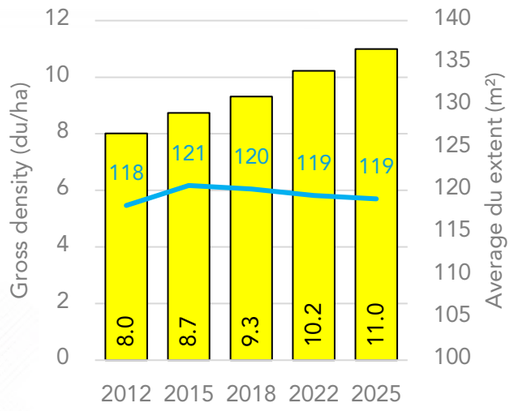
This indicator shows change in **gross residential density** over time (2012-2025) as captured in the City's General Valuation Rolls (**formal dwellings** only, excluding collective living quarters and any less-formal / informal structures not included in the Valuations Data). Data is aggregated by using a square grid comprised of 4ha (200m x 200m) grid cells.

Source: CCT Valuation Rolls 2012, 2015, 2018, 2022, 2025



Map C3-a: Change in gross residential density (2012 to 2025)

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



OVERALL TREND

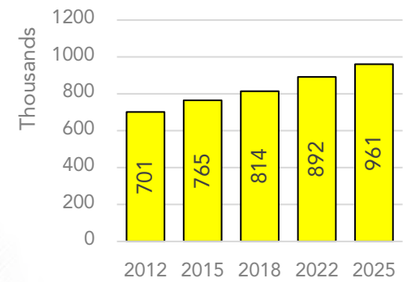
Densification is observed almost everywhere in the city. It occurs in different forms and at varying densities in different areas.

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 2025 occurred in the Metro South East, and recorded the highest densities (other than the CBD) as of 2025.
- Other significant increases in density between 2012 and 2025 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)
- New development areas (Rivergate, Parklands, Sunningdale, Fisantekraal, etc.) stand out as well, however this "densification" is in fact new development where the calculated density increased from zero or a very low number.



Graph C3-b:
Formal residential dwellings

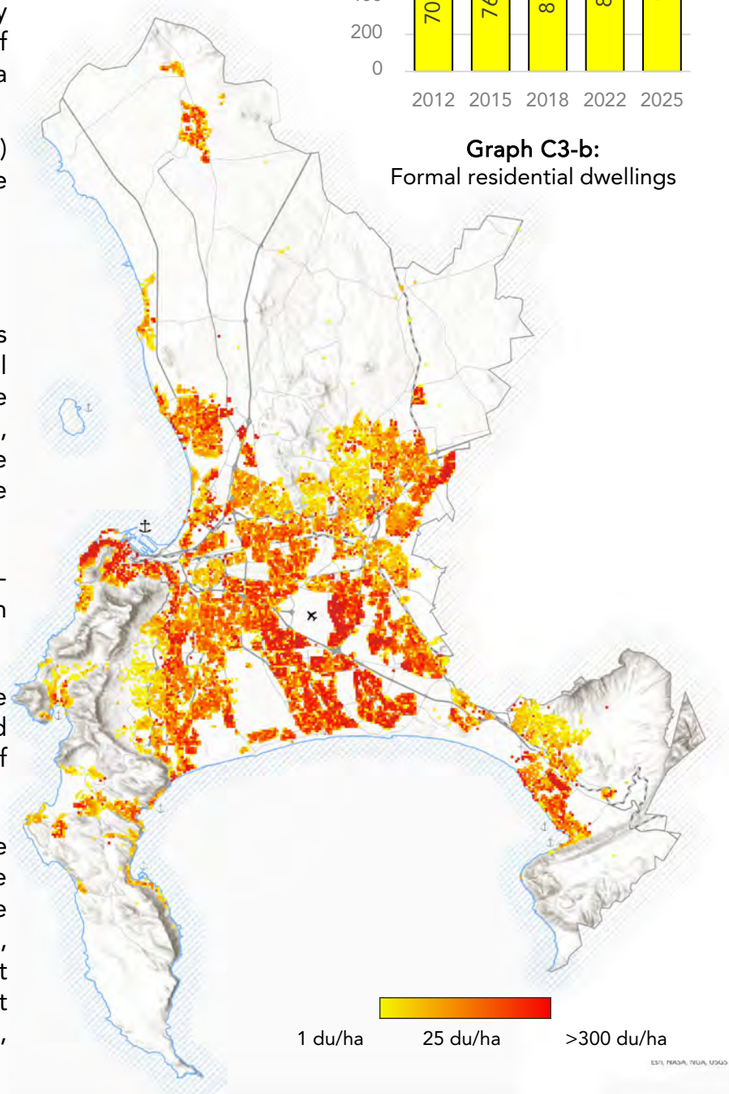
GENERAL ANALYSIS

Map C3-b shows the 2025 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 2025, in other words where densification has taken place to arrive at the density depicted on map C3-b. Gross density exhibits an 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.

Note that areas like Du Noon, the Metro South East (e.g. Delft, Blue Downs, Khayelitsha), Walacedene/Scottsdene, etc. show up on these maps as "formal" densification. However, the nature of the growth/densification is mostly less-formal in the form of hostels, boarding houses and blocks of flats. It is being shown here due it being included in General Valuations dataset following recent improvements to the Valuations data. "Formal" properties are, in turn, defined here as properties that are included in the Valuation Roll.



Map C3-b: Gross residential density (2025)

C.3

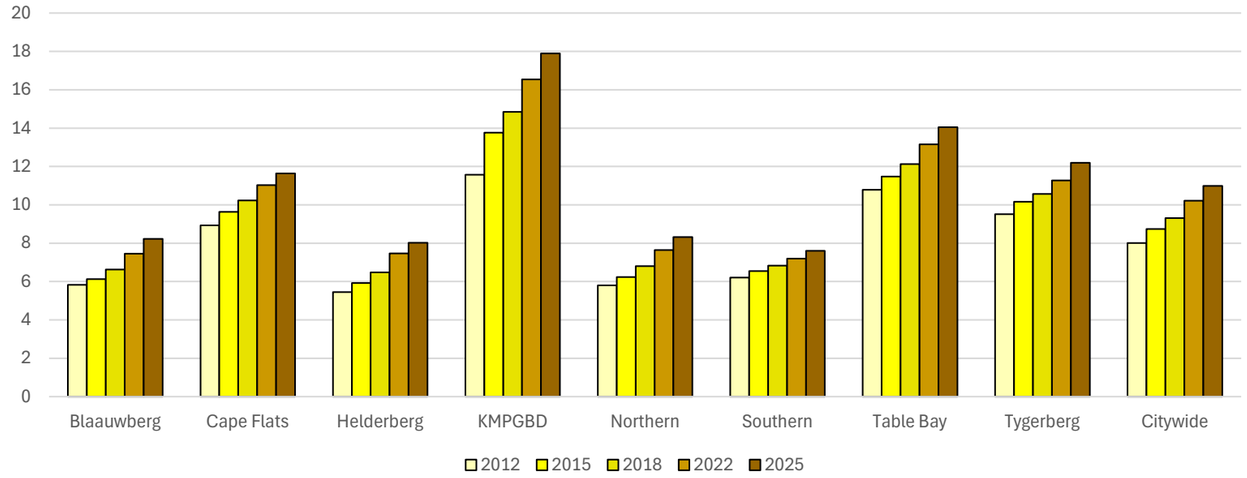
LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (DISTRICT ANALYSIS)

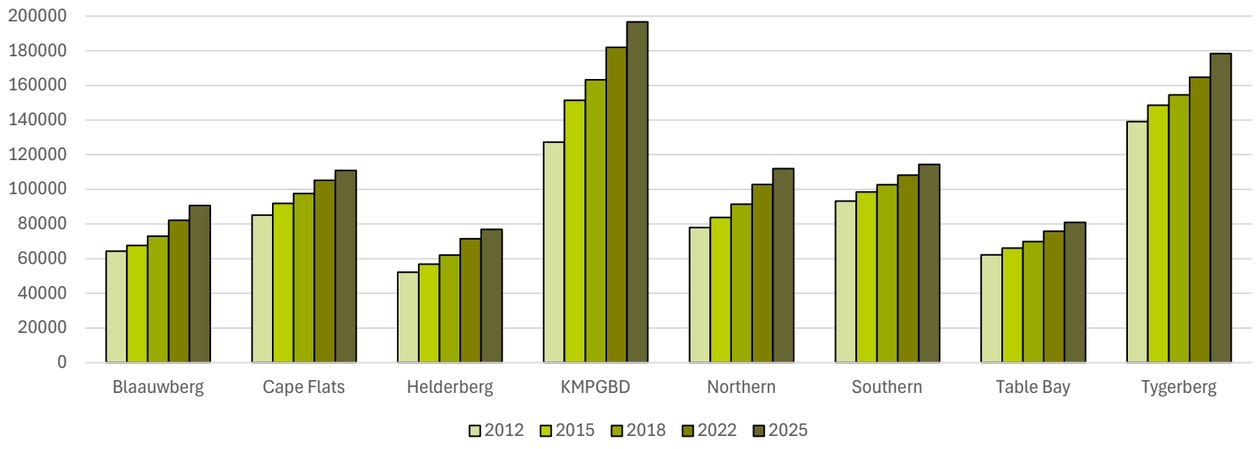
2026 Update

This indicator shows a change in **gross residential density** 2025) 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.

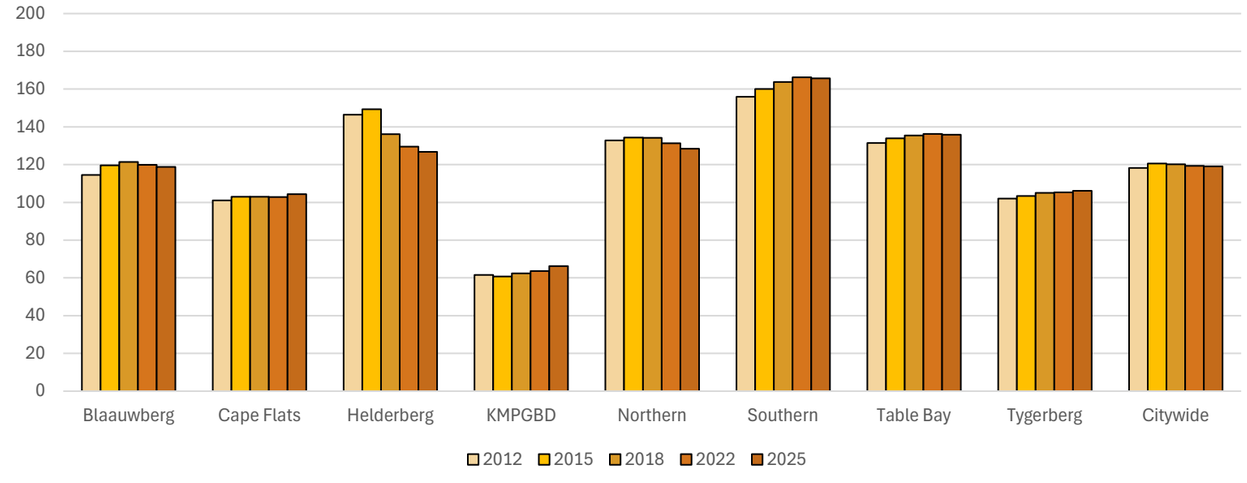
Source: CCT Valuation Rolls 2012, 2015 , 2018, 2022 and 2025



Graph C3-c: Average gross density (formal only) per district between 2012 and 2025



Graph C3-d: Number of formal residential dwellings per district between 2012 and 2025



Graph C3-e: Average dwelling extent (m²) per district between 2012 and 2025 (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 2025. Main insights include:

- Citywide, gross formal residential density has in general increased over the period. The gross residential density in Cape Town has increased by ± 37% to 11,0 du/ha.
- Gross densities in the KMPGBD, Helderberg, Northern and Blaauwberg districts have increased by more than 40%. These areas in the city typically have less greenfield land available and intensification is required.
- Gross densities in the Table Bay, Tygerberg and Cape Flats District have increased by ± 30%. The gross residential density has increased more slowly in the Southern District (± 23%). These are areas with limited new peripheral development and are often fairly densely developed already.
- Currently, the highest gross formal densities are in KMPGBD at ± 16.5 du/ha.

Graph C3-d compares the number of residential units in each of the districts between 2012 and 2025. 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 ±260 000 (37%) between 2012 and 2025.
- KMPGBD saw an increase in units of 55%. The Helderberg, Blaauwberg and Northern districts all saw an increase of over 40% over the period.
- The Cape Flats, Tygerberg, Southern and Table Bay districts all saw increases of between 23% and 30%.

Graph C3-e displays the average unit size per district between 2012 and 2025. The trends here are more unique to each district.

- Citywide, the average unit size increased from 118 m² to 119 m² (an increase of ± 1%).
- While unit sizes increased slightly across most of the planning districts (except Helderberg and Northern), 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 ± 165 m² to ± 126 m². The KMPGBD Districts has the lowest average unit size of ± 66 m².

SYNTHESIS

There is a substantial increase in formal residential dwellings throughout the city. Districts on the periphery of the city are continuing to exhibit lower density, sprawling development.

C.3

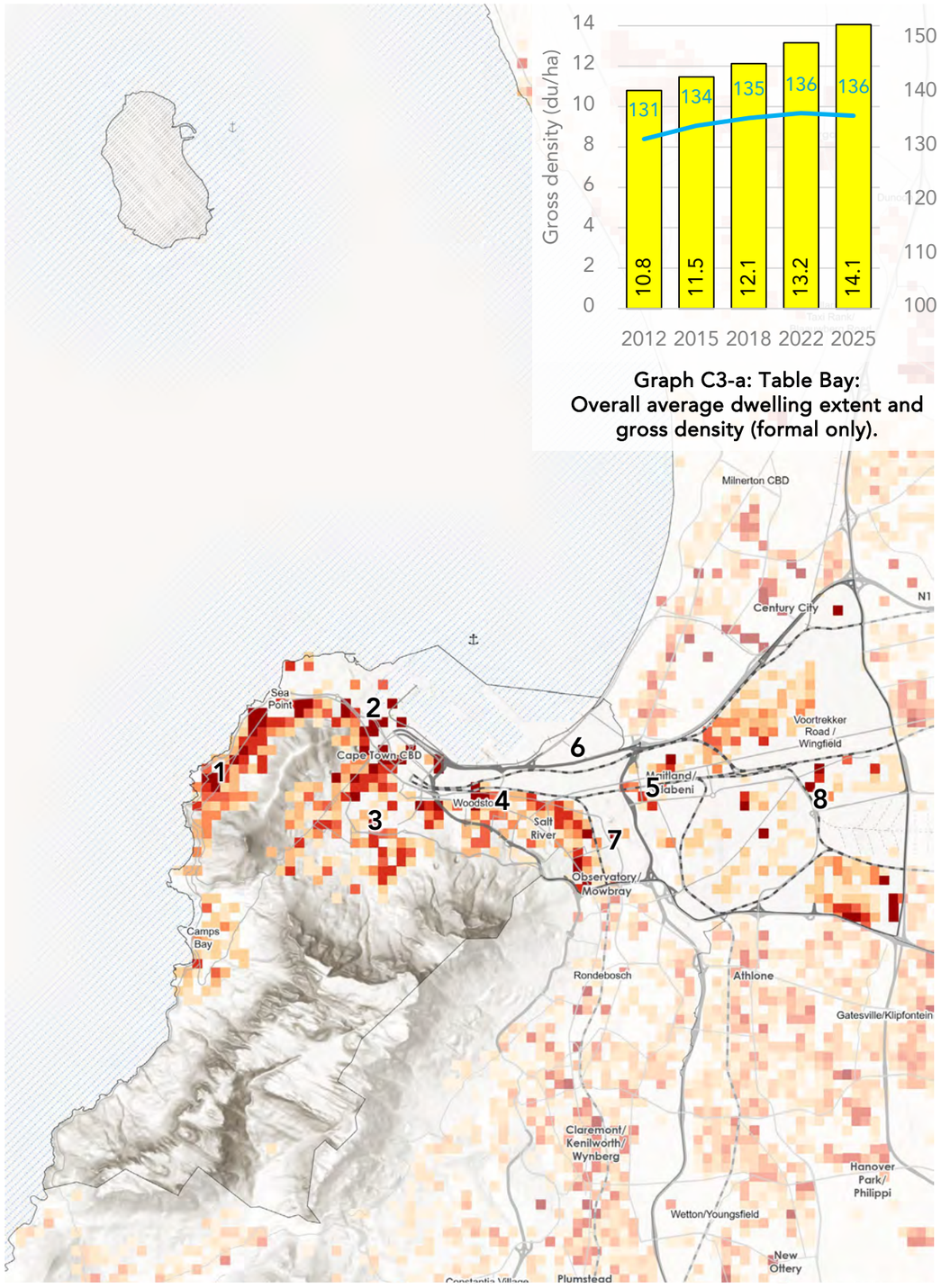
LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

2026 Update

This indicator shows a change in **gross residential density** over tim
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, 2022, and 2025

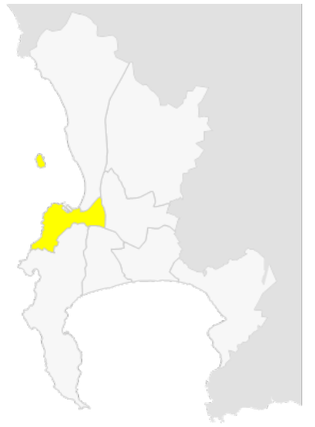


Map C3-a: Table Bay: Change in gross residential density (2012 to 2025).

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

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)

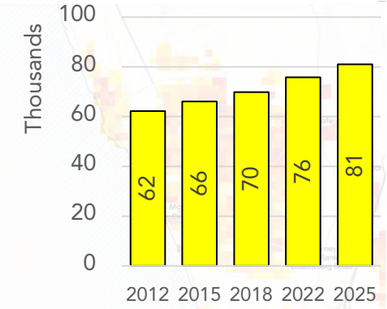


ALIGNMENT TO SPATIAL POLICY

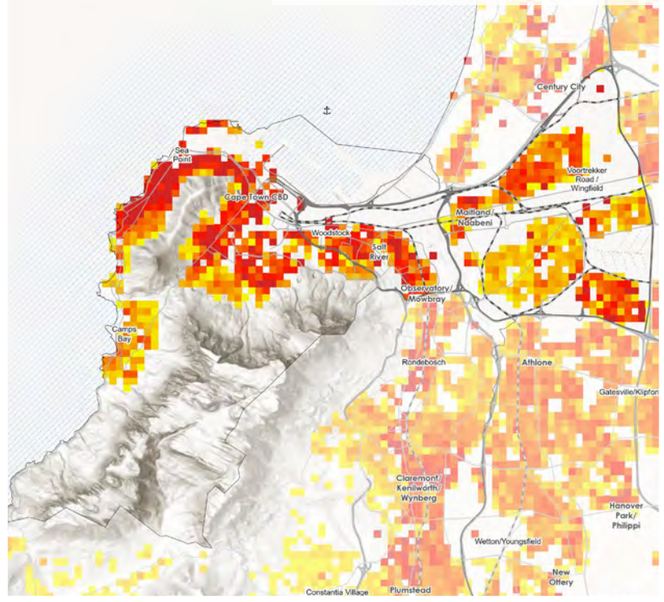
Generally the residential / dwelling densification observed between 2012 and 2025 (Map C3-a) is in line with spatial policy. These locations are well located close to public transport and high concentrations of employment opportunities and business areas. It's also areas of very high property values 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: Continued residential density increases along Main and Regent roads in Sea Point and some redevelopments in Mouille Point.
Trend of redevelopment along Main Rd with a mix of apartment hotels, apartments and ground floor retail. Luxury market multi-storey e.g. Dear Jean, The Sea Point, The Flamingo- are recent residential developments
2. Waterfront: Granger Bay EIA includes provision of housing including affordable housing. Gateway/Canal Precinct – hotels offices and residential. Luxury market multi-storey.
3. CBD: Increase in residential density in CBD.
Zeeland Pier - redevelopment of older office building to mixed residential. The York - luxury residential, Ten On V, Charlie and the Chairman and others completed in 2025.
4. Continued infill and redevelopment in Salt River: Urban Salt, The Herringbone, breaking ground of Salt River Market affordable housing.
5. Maitland: Continued development of the Maitland Station Precinct, including the Cube development.
6. Paarden Eiland: There were several approved applications for land use and building conversion of industrial to mixed use (including residential), Maritime Place constructure.
7. Two Rivers Urban Park: River Club, mixed use infill in the Two Rivers Urban Park initiated through the Riverlands development Oude Molen in planning.
8. Conradie Park: This very large inner city private partnership project for residential and mixed use is occupied.



Graph C3-b Table Bay: Formal residential dwellings.



Map C3-b: Table Bay: Gross residential density (2025).

C.3

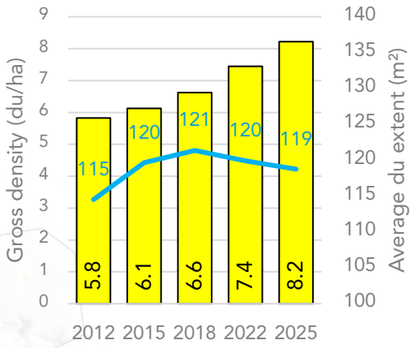
LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

2026 Update

This indicator shows a change in **gross residential density** over time (2012-2025) 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.

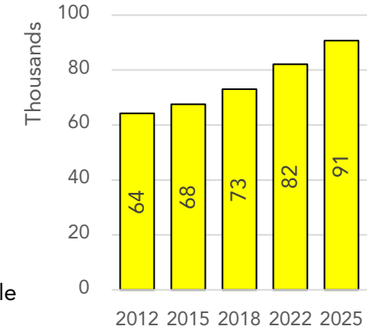
Source: CCT Valuation Rolls 2012, 2015, 2018 , 2022, and 2025



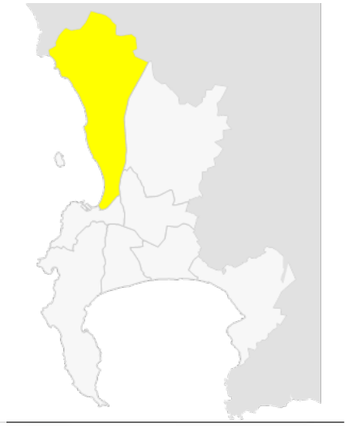
Graph C3-a: Blaauwberg: Overall average dwelling extent and gross density (formal only).

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)



Graph C3-b: Blaauwberg: Formal residential dwellings.



LOCAL LEVEL TRENDS

1. Atlantis – low to medium increases associated with government housing projects.
2. Witsand north – high increase in density due to housing project.
3. Low density but widespread throughout the Klein Dassenberg smallholding area.
4. Wolwerivier TRA established and increase construction on Morningstar Smallholdings.
5. Dunoon – redevelopment of RDP units to micro developments, small scale rental reflecting incremental growth.
6. Large release of land at approximately 70ha at Annandale site.
7. Rivergate node – Pioneer Valley affordable group housing development, predominantly FLISP continue in construction with some completed.
8. Gie Road – Increased densification on sites along Gie and Arnold Road.
9. Marine Circle and Beachfront – some increases in density in few roads back from the main node and 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. Large development blocks and gated estates - including several Balwin developments, Northridge estate and Sandown phases.
11. Blaauwberg Road corridor, increase in density around Marine Circle and Porterfield Road (area west of R27), noted development along parallel roads to Blaauwberg east of the R27, especially in Athens, North and Arum Road.
12. Summer Greens – Whole suburb showing an increase in gross density, mainly through incremental densification. 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 for example Bridgeway Axis
14. Koeberg Road – densification along the corridor, especially taken up in parallel roads in Brooklyn and Rugby

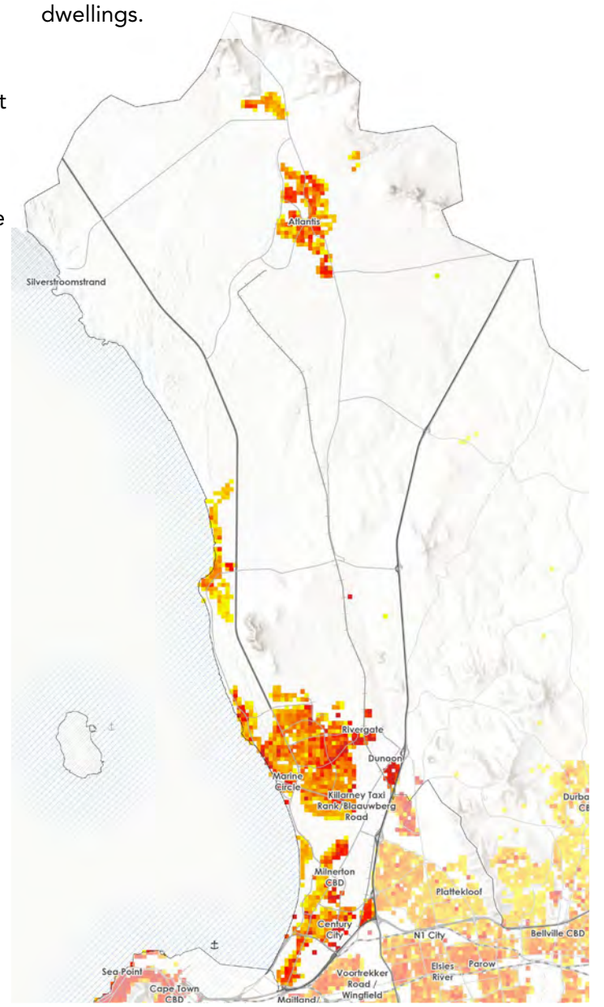
Map C3-a: Blaauwberg: Change in gross residential density (2012 to 2025).

ALIGNMENT TO SPATIAL POLICY

Development opportunities on greenfield sites, evolving market trends, and the attractiveness of coastal locations are key drivers of densification in this district. Evidence suggests that market forces and desirable location characteristics, such as beachfront access, are influencing density growth more than spatial policy alone.

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

- Atlantis generally aligns with NDAs.
- The district's development patterns are broadly aligned with spatial policy, with most new greenfield growth occurring within designated development areas, particularly along the Sandown corridor. Density increase driven by private sector.
- Densification has also been concentrated in planned nodes like Century City, corridors like Sandown Road, with portions directly adjacent to corridors in Blaauwberg and Koeberg Road.
- However, significant incremental and micro-unit development in areas like Du Noon, Joe Slovo Park and Summer Greens is exceeding planned densities, creating infrastructure pressures while meeting strong rental demand.
- Coastal areas, particularly along the Table View beachfront, continue to densify despite limited policy direction, indicating that market demand and locational advantages are stronger drivers of density than spatial policy in some areas. Title deed restrictions also continue to limit densification along the Blaauwberg Road corridor, reinforcing development in parallel roads.



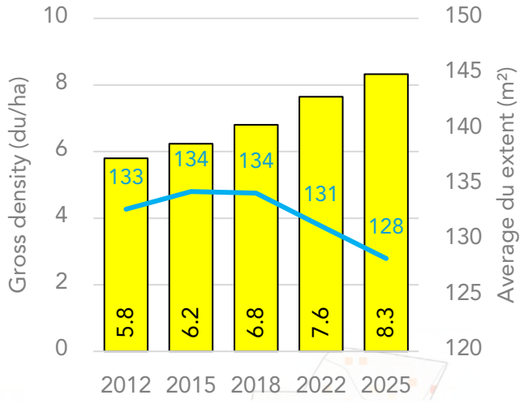
Map C3-b: Blaauwberg: Gross residential density (2025).

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2025) 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 , 2022 and 5025



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

Map C3-a: Northern: Change in gross residential density (2012 to 2025).

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)

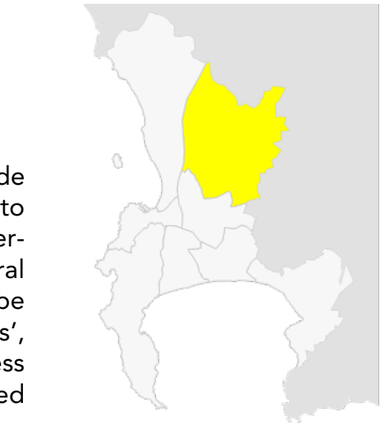
LOCAL LEVEL TRENDS

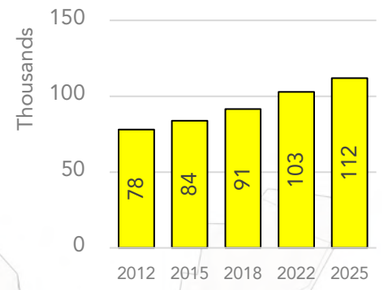
Primarily the trends (densification) in the Northern District relate directly to proposals made in the approved District Plans (mostly NDA's). However, the impact can also be ascribed to incremental densification as described in the Densification Policy, especially in lower-density older single residential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

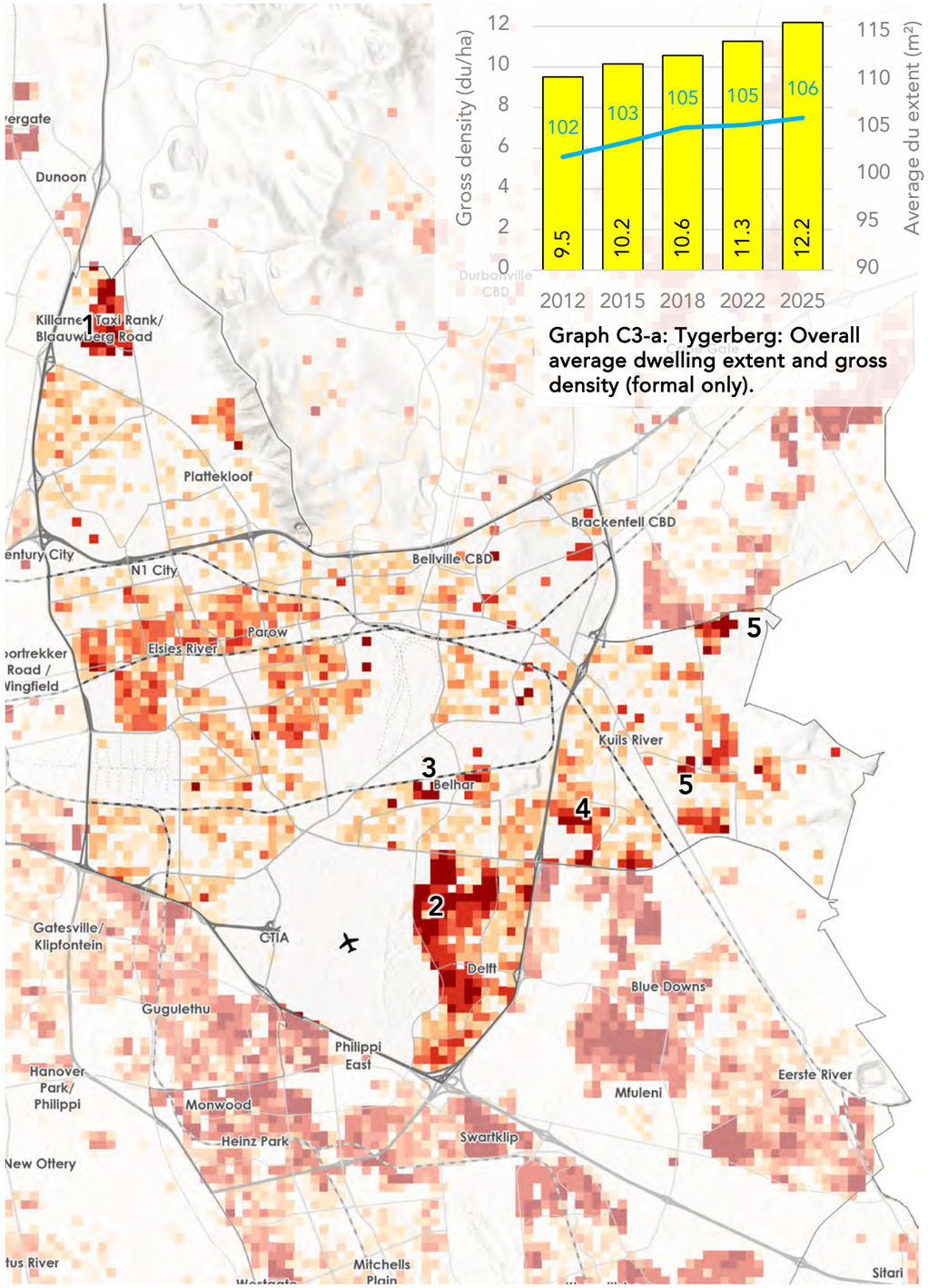
Map C3-b: Northern: Gross residential density (2025)

LAND AND BUILDING DEVELOPMENT

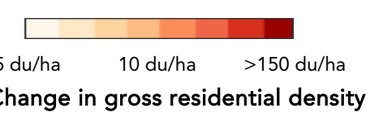
FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

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 , 2022 and 2025



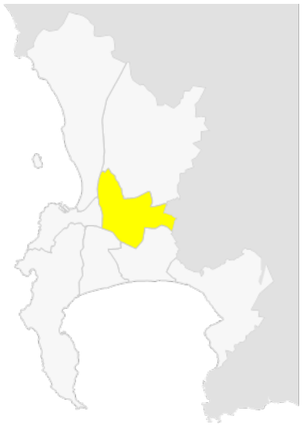
Graph C3-a: Tygerberg: Overall average dwelling extent and gross density (formal only).



Map C3-a: Tygerberg: Change in gross residential density (2012 to 2025).

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



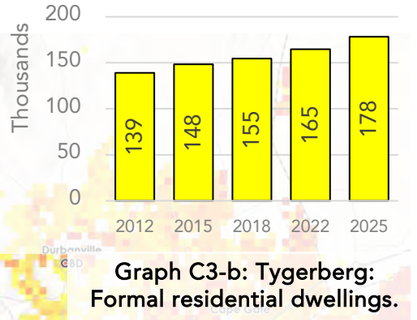
ALIGNMENT TO SPATIAL POLICY

Significant increases in density between 2012 and 2025 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.

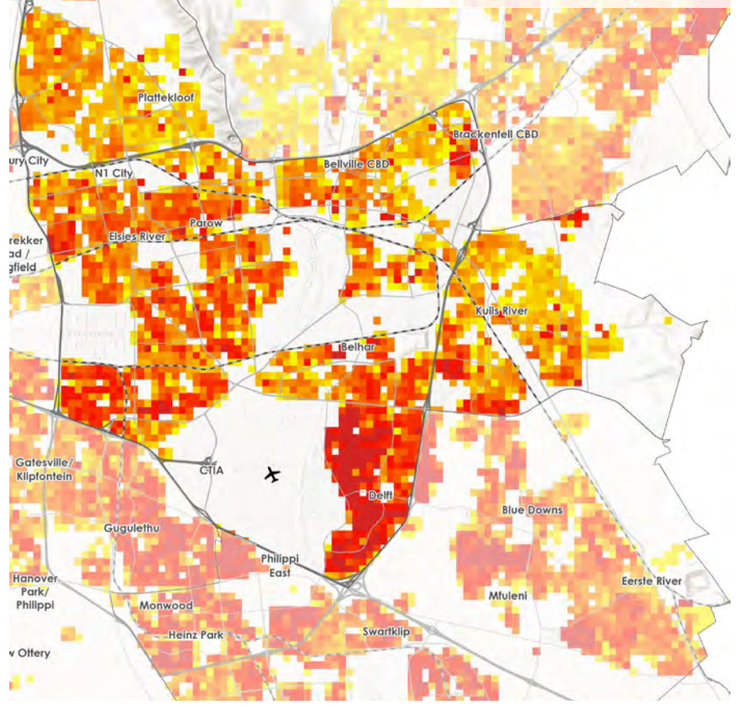
LOCAL LEVEL TRENDS

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. Haasendal area along Bottelary Road & Zevenwacht Link Road consists of general residential projects being implemented at high densities.



Graph C3-b: Tygerberg: Formal residential dwellings.





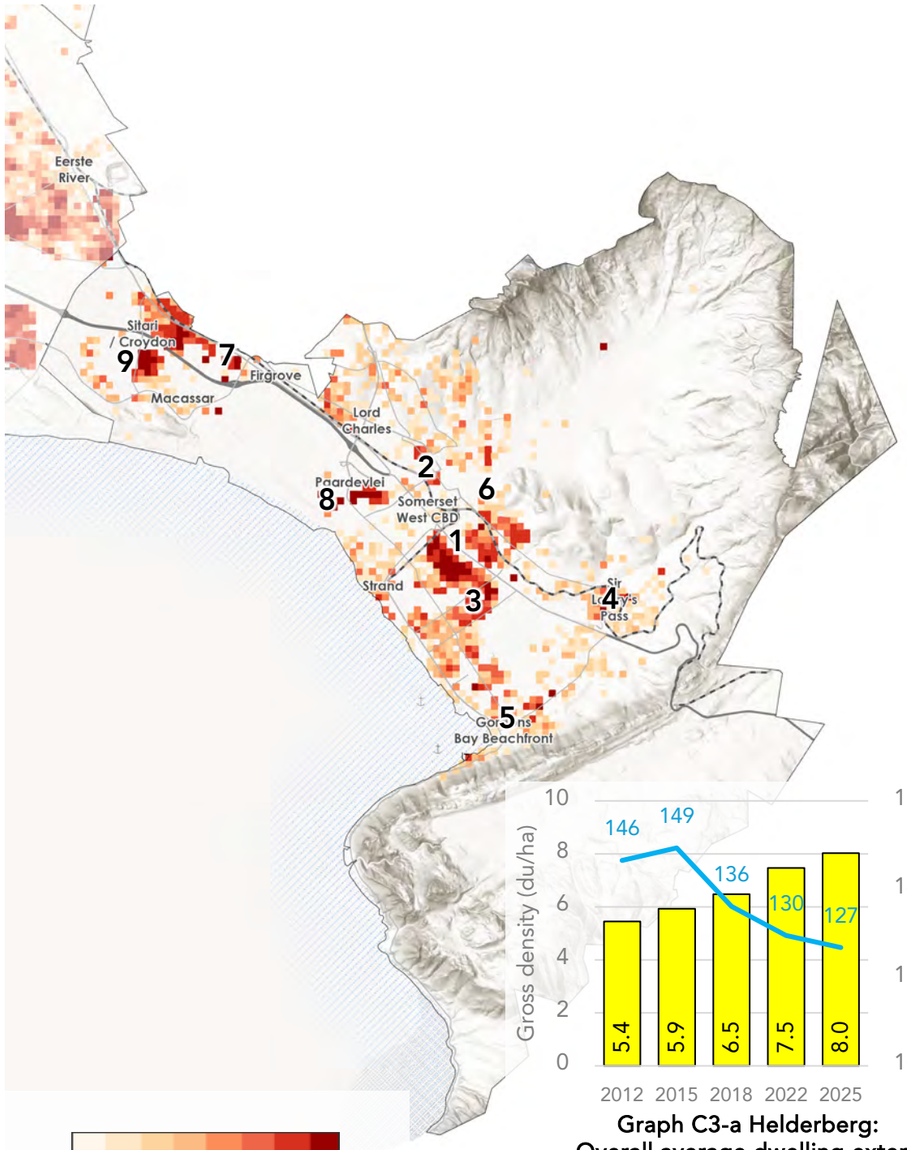
Map C3-b: Tygerberg: Gross residential density (2025)

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2025) 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, 2022 and 2025



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

Map C3-a: Helderberg: Change in gross residential density (2012 to 2025).

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.

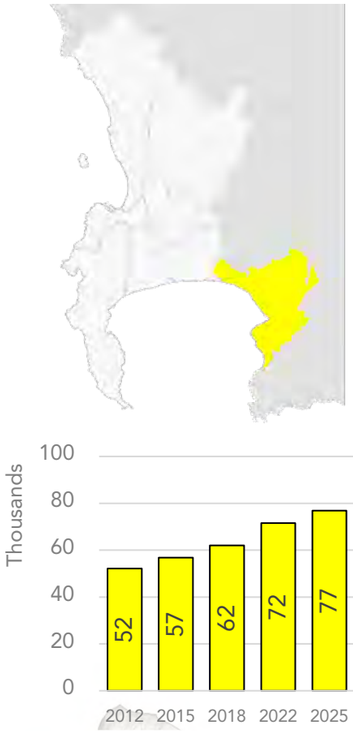
DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)

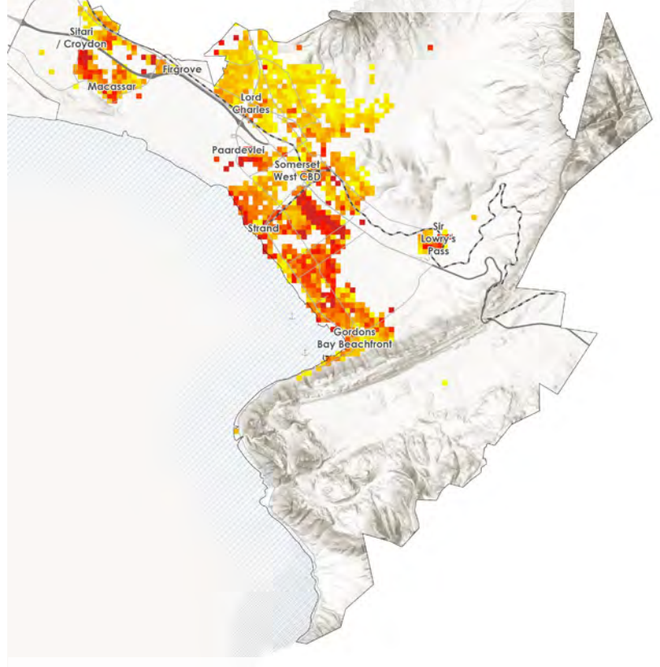
LOCAL LEVEL TRENDS

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 identified, especially within the Lwandle and Nomzamo 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.



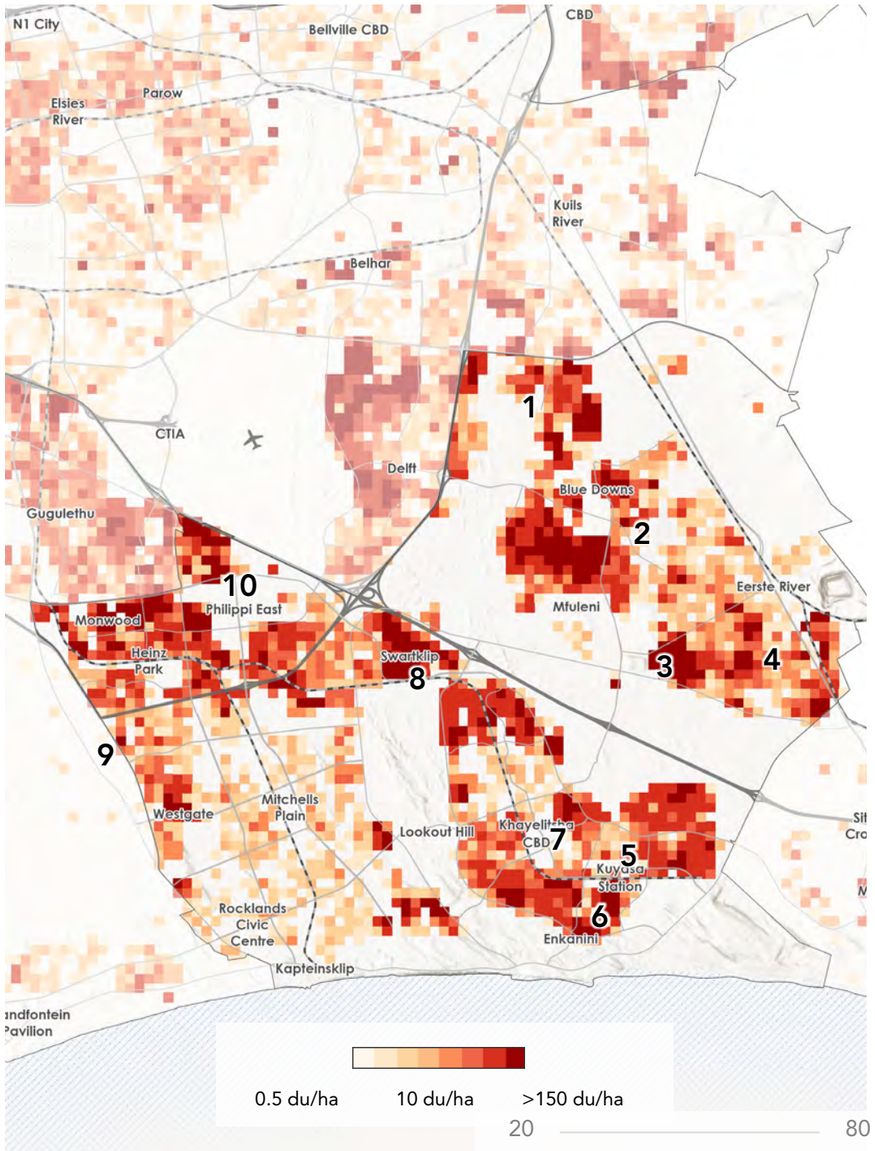
Map C3-b: Helderberg: Gross residential density (2025).

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.

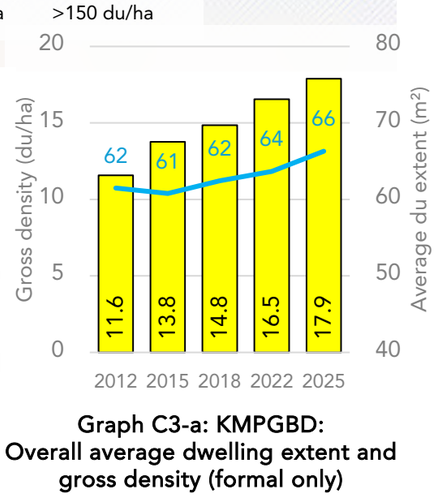
Source: CCT Valuation Rolls 2012, 2015, 2018, 2022 and 2025



Map C3-a: KMPGBD: Change in gross residential density (2012 to 2025).

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

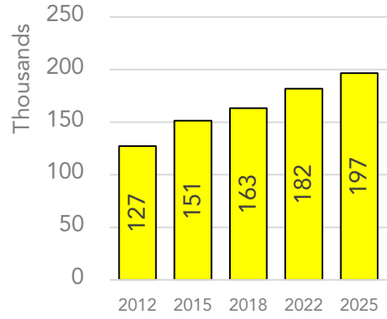
KMPGBD DISTRICT (F)

LOCAL LEVEL TRENDS

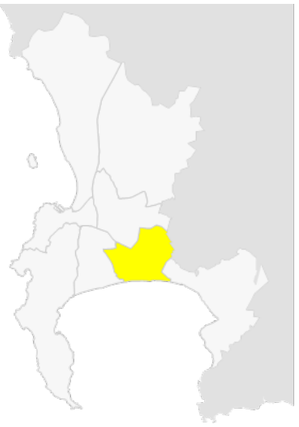
The updated valuation data records approximately 197,000 formal dwellings in 2025, compared with 182,000 in 2022. Formal gross residential density increased from 16.5 to 17.9 du/ha over this period. The maps show substantial growth around Blue Downs, Mfuleni and Eersteriver, with further increases across parts of Khayelitsha and Mitchells Plain:

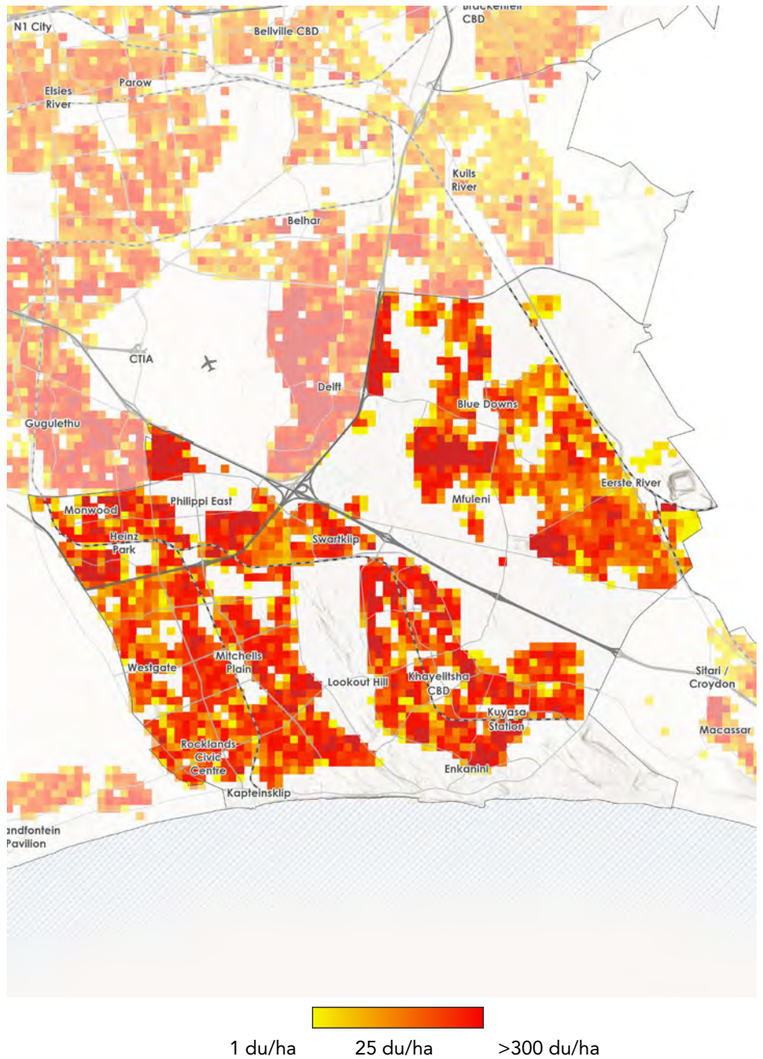
1. **Hagley and Wesbank:** Residential growth is evident around Hagley and Wesbank. The previous district review identifies a combination of private and state-assisted housing, with additional small-scale rental accommodation in Wesbank.
2. **Blue Downs and Mfuleni:** The maps show extensive increases in recorded residential density. Local development includes flats and additional accommodation within established residential areas.
3. **Forest Village:** A pronounced increase is visible south of Mfuleni, consistent with the state-assisted housing development identified in the previous district review.
4. **Greater Eersteriver:** Residential growth includes development on previously vacant land and infill within the established urban area. The previous review identifies a range of housing forms, including freestanding houses and flats.
5. **Kuyasa station surrounds:** Recorded density has increased around the station area. The previous review also identifies small-scale rental development, providing useful context for the observed growth.
6. **Enkanini and Monwabisi surrounds:** The maps show increased recorded density in parts of southern Khayelitsha. Informal accommodation outside the valuation roll requires separate consideration.
7. **Khayelitsha CBD and surrounds:** The area has a substantial residential concentration. Further intensification should strengthen the relationship between housing, public transport and the services offered by the CBD.
8. **Site C and northern Khayelitsha:** Recorded density has increased in parts of the area. Planned housing upgrades should be reported separately from development already captured in the valuation data.
9. **Weltevreden Valley and Mitchells Plain:** Residential increases are visible along the western edge and within established neighbourhoods. The previous review identifies private housing development and social housing as part of the local development context.
10. **Philippi East and surrounds:** The maps show increased formal residential density alongside extensive informality. Read this pattern together with the Areas of Informality indicator.

The indicator covers formal dwellings recorded in the valuation roll. Informal structures and rental accommodation not captured in the roll are excluded.



Graph C3-b: KMPGBD: Formal residential dwellings





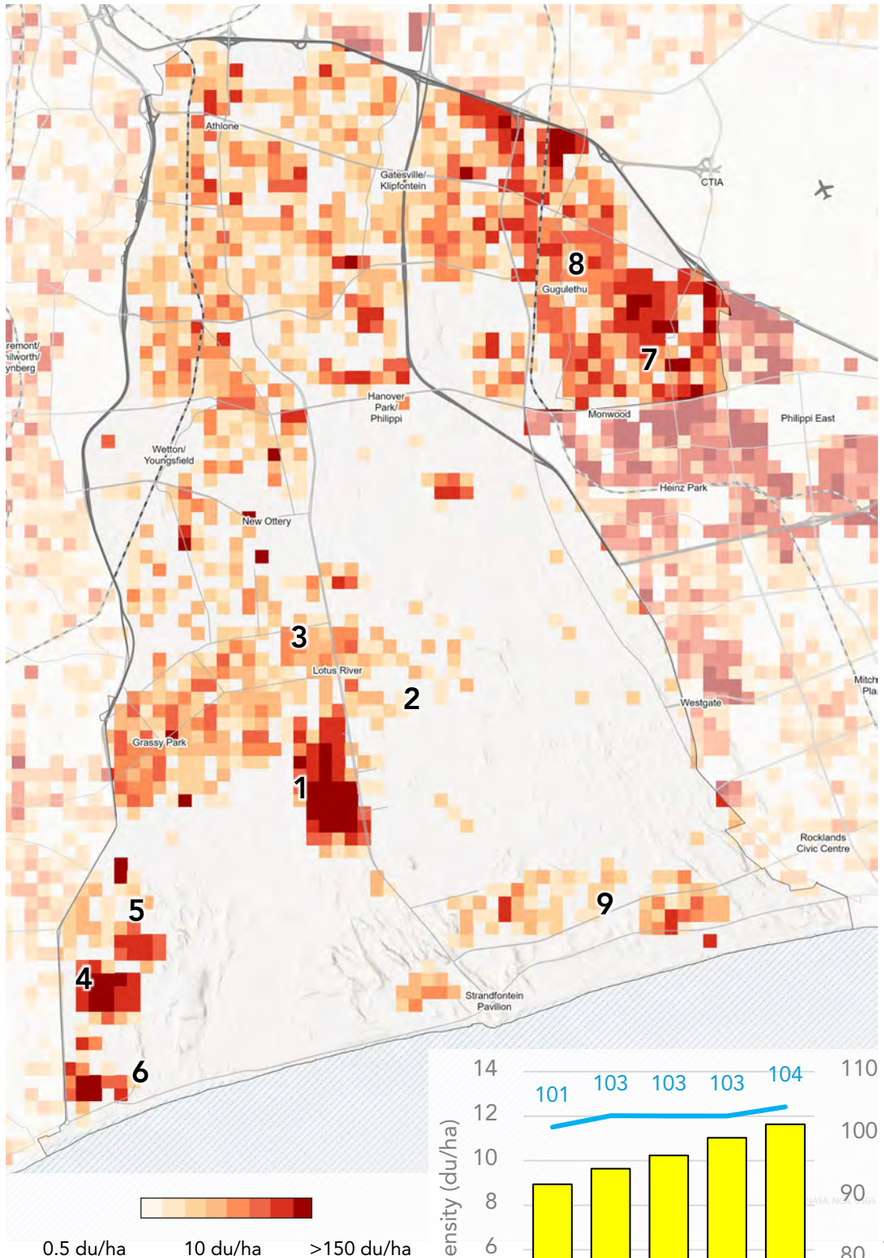
Map C3-b: KMPGBD: Gross residential density (2025)

LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

This indicator shows a change in **gross residential density** over time (2012-2025) 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, 2022 and 2025

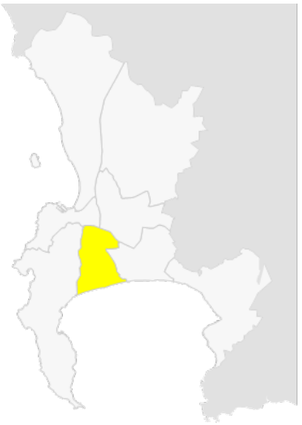


Map C3-a: Cape Flats: Change in gross residential density (2012 to 2025)

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

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)



LOCAL LEVEL TRENDS

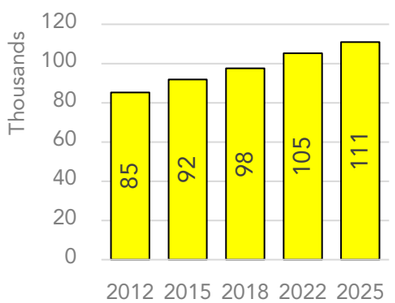
The Cape Flats District continues to densify slowly and incrementally, mainly through single-residential development. Formal dwellings grew from approximately 85 000 to 111 000 between 2012 and 2025, yet gross density remains low at 11.6 du/ha. The most substantial increases are concentrated in government-subsidised housing projects and largely align with planned NDAs, nodes and development corridors. Growth in Vrygrond, Seawinds and Capricorn, however, has occurred outside these targeted areas. The areas with a substantial change are highlighted below:

[1] Pelikan Park shows the largest increase in the district. Phase 1, previously an NDA along the Strandfontein Road development corridor, demonstrates how well-located state land can deliver density at scale. Phase 2, also an NDA, is at an advanced planning stage.

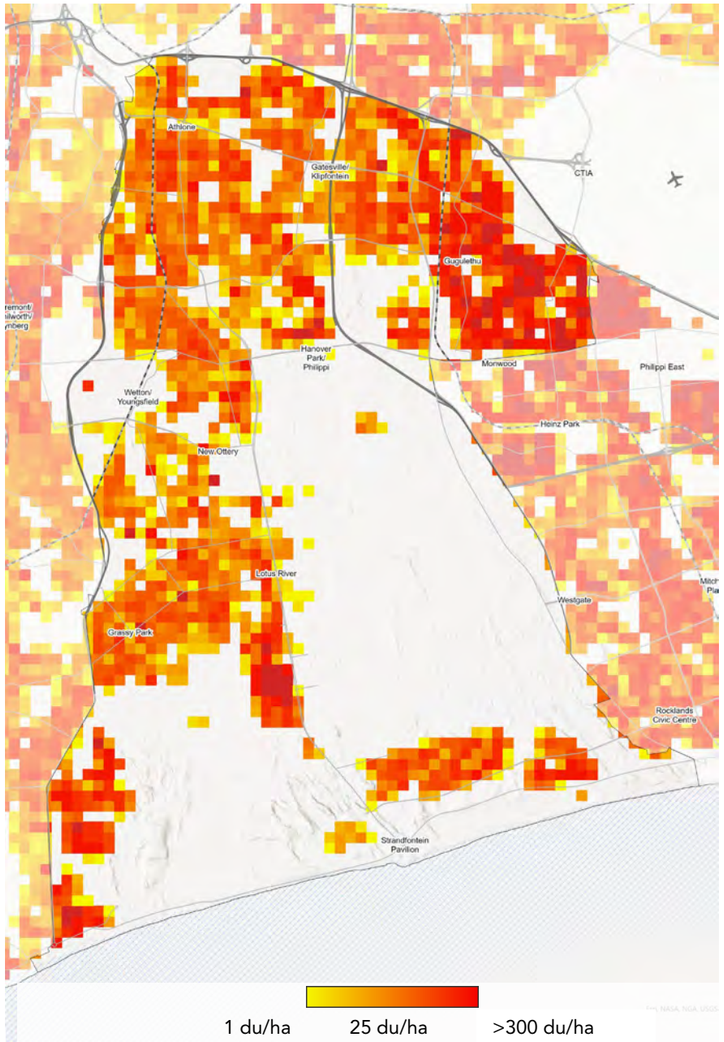
[2] In Schaapkraal, small-scale subdivisions are steadily converting smallholdings to urban use within the urban development edge, as supported along the Strandfontein Road corridor. Flats have also been developed close to the **[3]** Lotus River local node. Increased subdivision and rezoning applications suggest this transition will continue. **[4]** Vrygrond and **[5]** Seawinds have seen strong growth in formal dwellings within existing urban development, outside identified nodes and corridors. High levels of backyarding, not captured in the formal data, point to ongoing demand for affordable rental accommodation.

[6] Around Capricorn and Costa da Gama, single-storey units and two- to five-storey flats have emerged close to the Capricorn shopping centre and Prince George Drive. This growth is not within an NDA, node or corridor, but reflects the pull of established commercial and transport infrastructure. Densities are highest in **[7]** Nyanga and **[8]** Gugulethu, where growth aligns with the urban nodes, mixed-use intensification areas and the Klipfontein Road, Steve Biko Drive and Emms Drive corridors. Informality remains high, so actual densities exceed those shown.

[9] Strandfontein remains largely single-residential, with incremental densification through second and third dwellings around Spine Road. The NDAs along Spine Road and the coastal node are yet to be developed and are expected to drive future growth.



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



Map C3-b: Cape Flats: Gross residential density (2025)

C.3

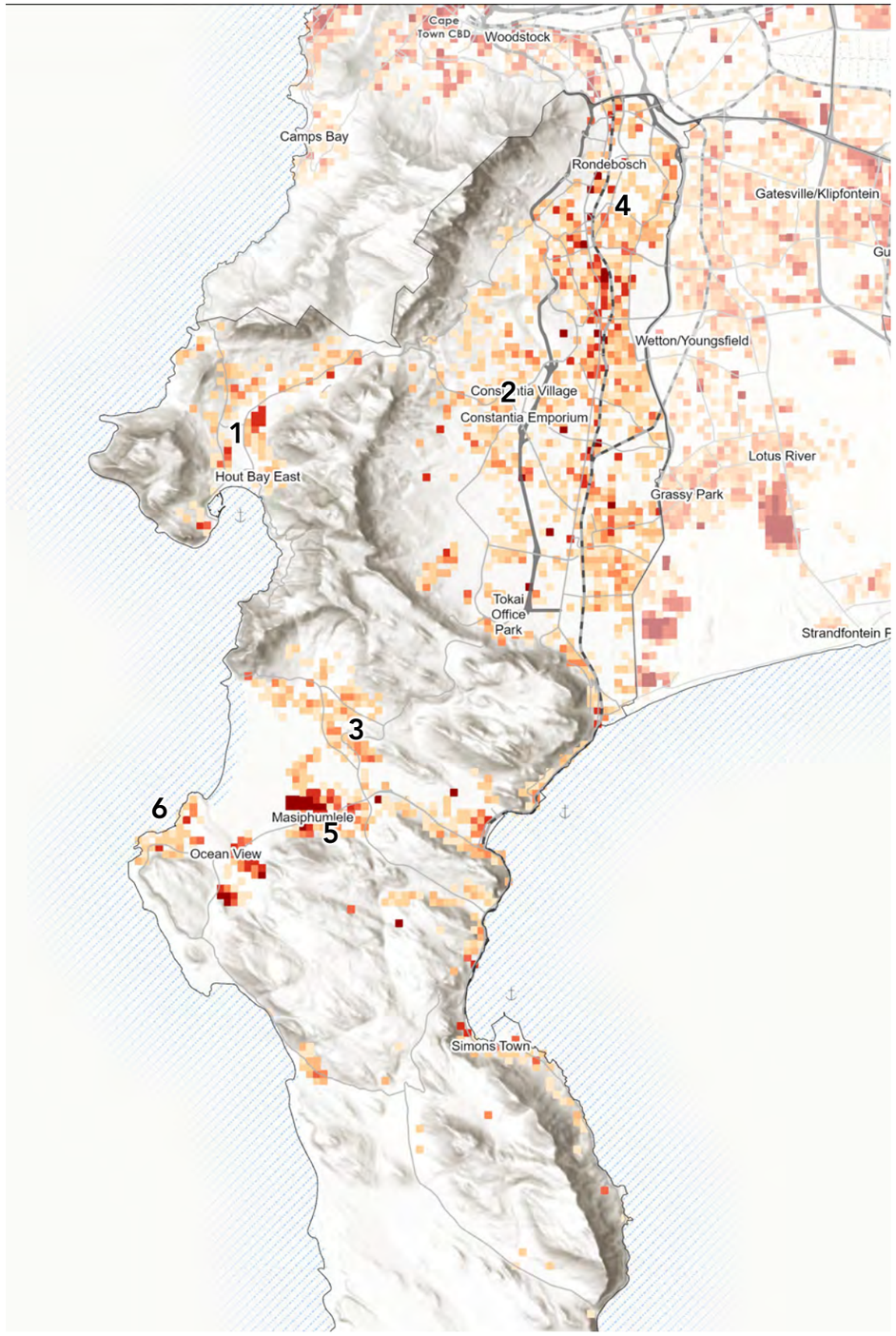
LAND AND BUILDING DEVELOPMENT

FORMAL RESIDENTIAL DENSITY (BY DISTRICT)

2026 Update

This indicator shows a change in **gross residential density** over time (2012-2025) 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, 2022 and 2025

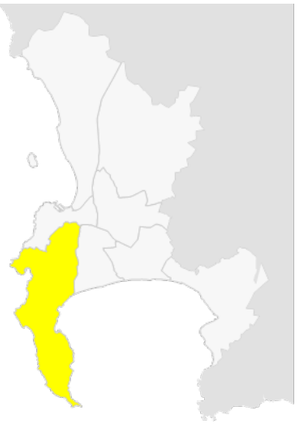


0.5 du/ha 10 du/ha >150 du/ha

Map C3-a: Southern: Change in gross residential density (2012 to 2025).

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)



LOCAL LEVEL TRENDS

Densification in the Southern District continues to occur at a comparatively slow rate. Change in formal residential density has comprised of three distinct types.

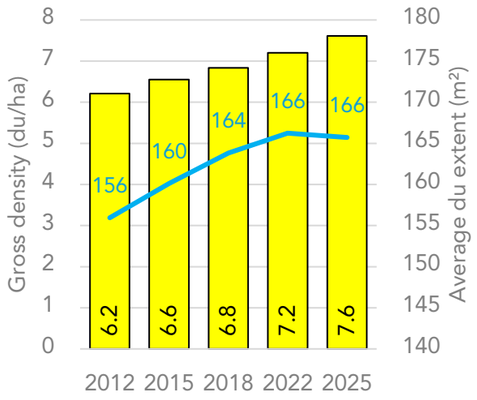
The most widespread is small-scale incremental subdivisions happening in mainly peripheral low-density residential areas (in [1] Hout Bay, [2] Constantia – Tokai, and to a lesser extent the Far South [3]).

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.

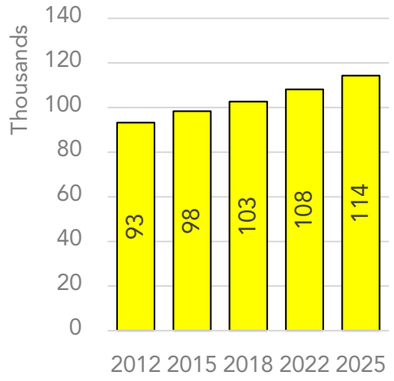
Most lower-density infill developments in mainly more peripheral areas are comparatively small gated villages for high-income residential estates or retirement complexes in response to increasing demand.

ALIGNMENT TO SPATIAL POLICY

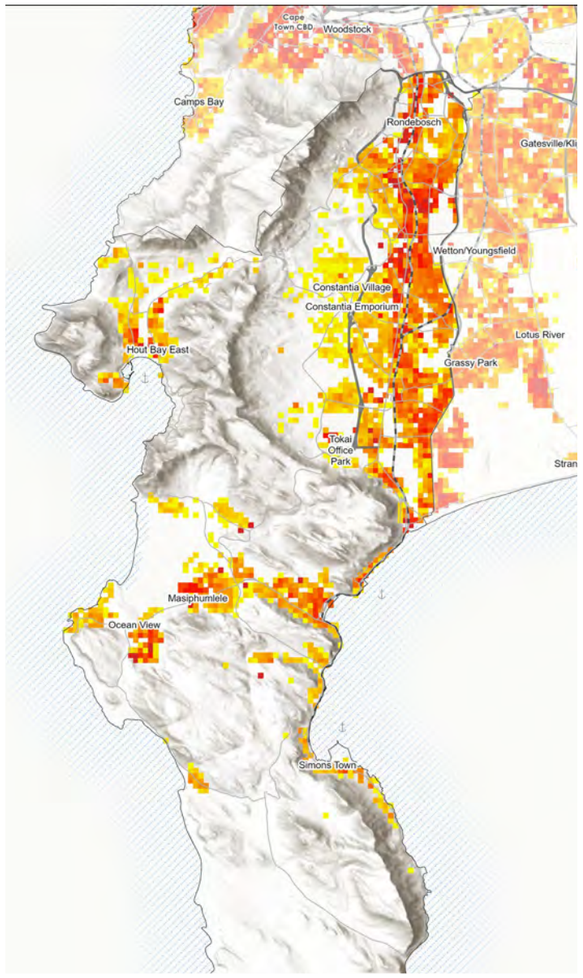
Little to no infill has yet taken place in identified NDA areas except for residential NDAs in the Kommetjie area [6]. Small-scale densification has however steadily continued in the northern part of Main Road corridor.



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



Graph C3-b: Southern: Formal residential dwellings



1 du/ha 25 du/ha >300 du/ha

Map C3-b: Southern: Gross residential density (2025)

FORMAL RESIDENTIAL DENSITY

KEY TAKE-AWAY TRENDS:

- **Residential density is increasing across Cape Town.** Formal gross residential density increased from 8.0 du/ha in 2012 to 11.0 du/ha in 2025, although the rate and form of densification vary between districts. The average consolidated residential density (all typologies) across the metro is 46.28 du/ha

- **Density patterns broadly align with spatial policy.** Densities are highest in the UIC and IGCA and negligible in the DGA and CNA. Between 2018 and 2025, formal density increased by approximately 15% in the UIC and 22% in the IGCA.

- **Densification occurs through multiple processes,** including infill, redevelopment, higher-density residential development, development along nodes and corridors, subsidised housing, and conversion of some non-residential space to residential use.

- **Residential density is closely linked to dwelling typology and location.** Higher-density areas generally contain more intensive residential forms, while the spatial concentration of residential development reflects desirability, accessibility and affordability.

- **Incremental Additional Dwellings (IADs) are an important but difficult-to-measure component of densification.** A new methodology using aerial imagery, LiDAR and automated building analysis has been developed to improve their identification and estimation.

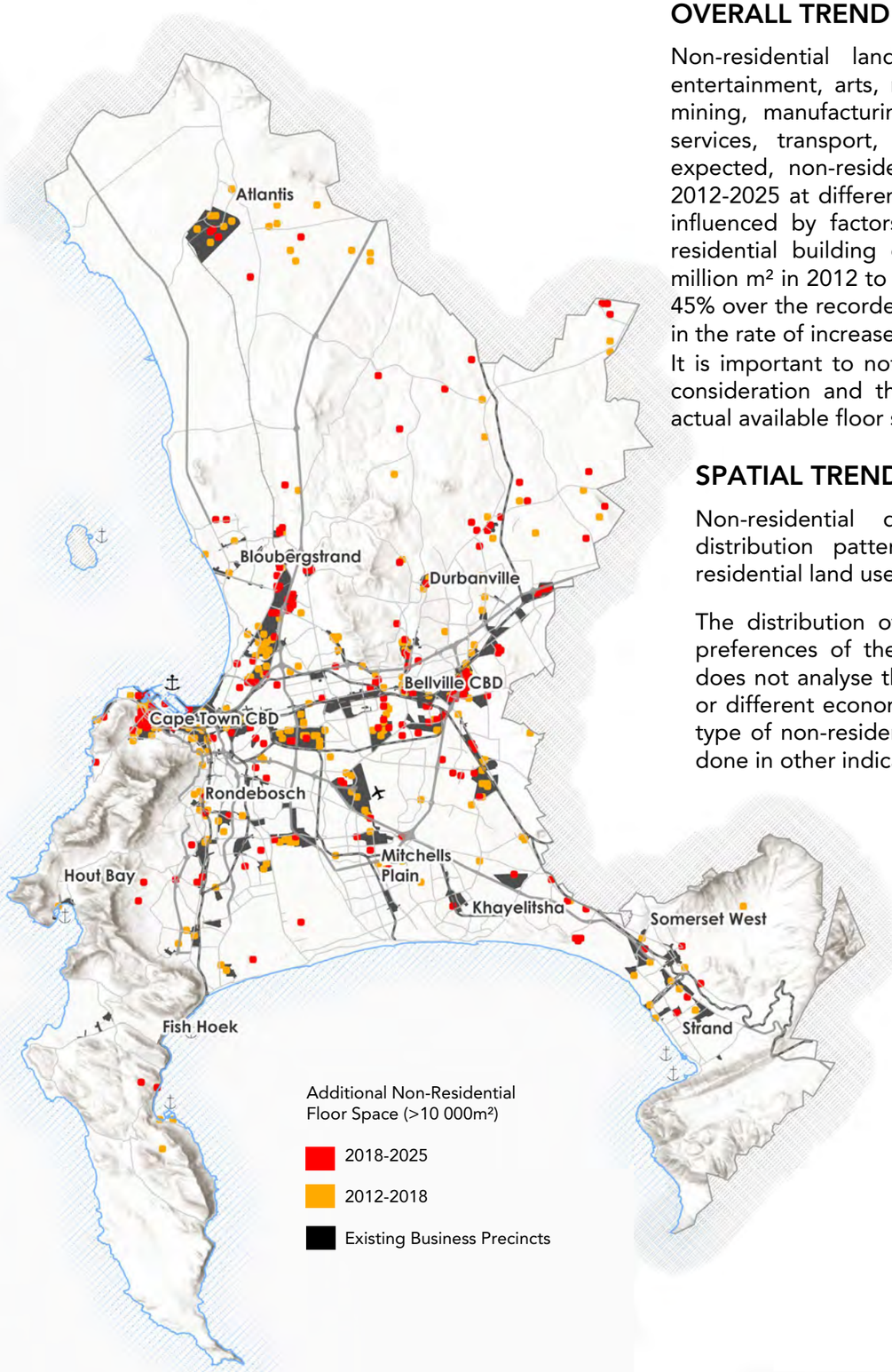
C.4

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, 2025).
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, 2025



Map C4-a: Change in non-residential land use (floor space) in m² (2012 to 2025)

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 2012-2025 at different levels for the various property sectors, as influenced by factors relevant to each. The total formal non-residential building extent increased from approximately 41,4 million m² in 2012 to 60,2 million m² in 2025, an increase of some 45% over the recorded period. There has however been a decline in the rate of increase over the last GV period.

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 recorded in the GV.

SPATIAL TREND (DISTRIBUTION/ PATTERN)

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

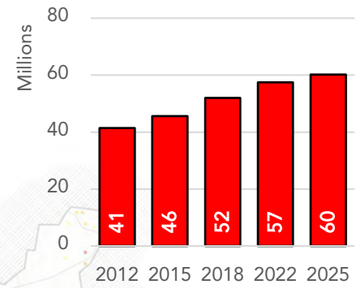
The distribution of non-residential land use reflects location preferences of the various underlying sectors. This indicator does not analyse the different non-residential property sectors or different economic sectors, e.g. this does not indicate what type of non-residential development took place where.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

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

- The most notable increases in non-residential development occurred within established business precincts pointing to a tendency to agglomerate.
- The CBD, Foreshore, V&A Waterfront, Century City, Killarney Gardens, Montague Gardens, as well as Bellville South, and specifically Brackengate and Blackheath have experienced significant increase in non-residential development between 2012 and 2025.
- 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-b: Non-residential land use (floor space) in m² (2025)

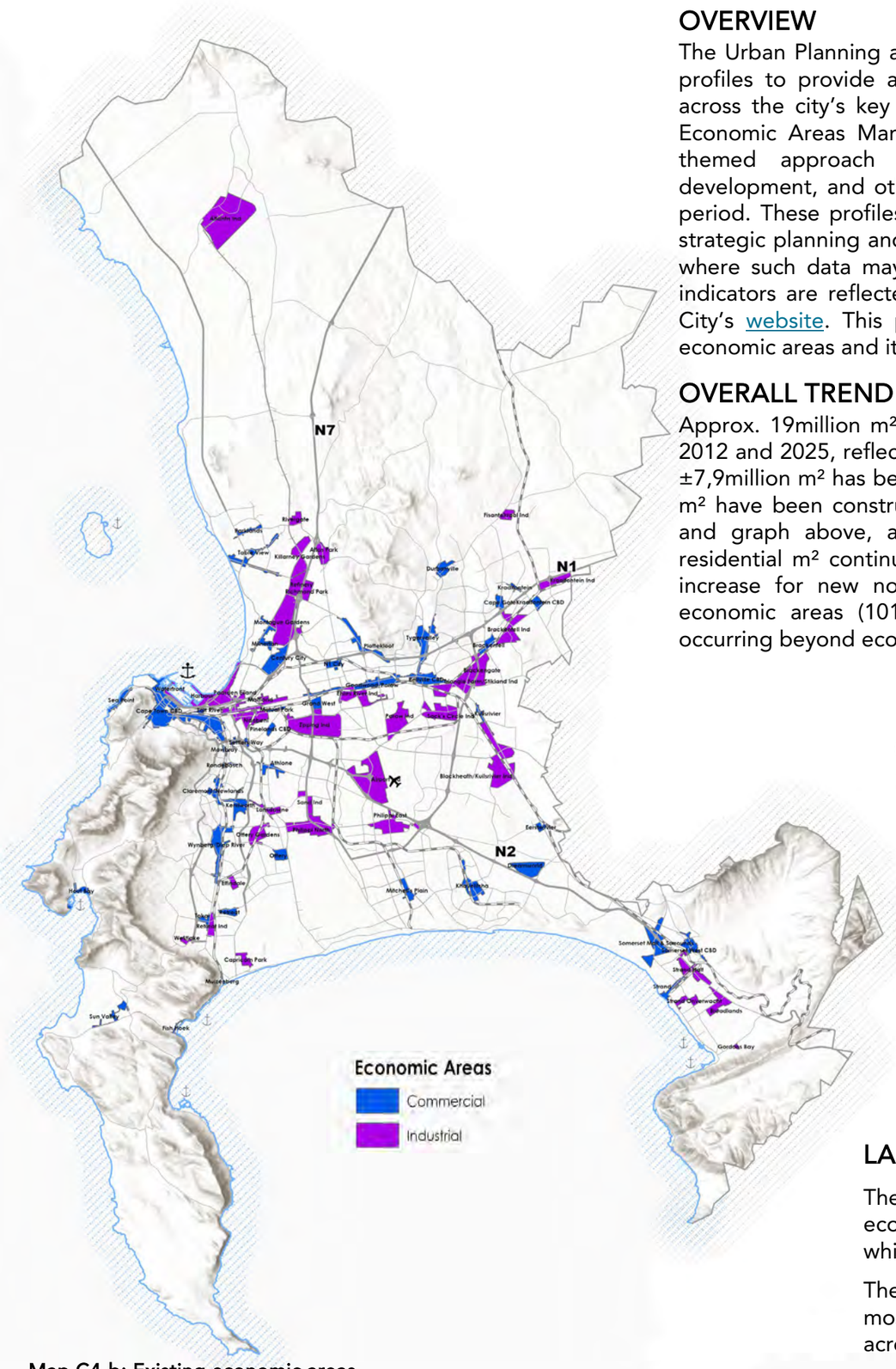
2026 New

C.4b

LAND AND BUILDING DEVELOPMENT
ECONOMIC AREAS

This indicator assesses the change in square metres of building floor area in respect of non- residential land uses as captured in the City's General Valuation Rolls (2012, 2015, 2018, 2022, 2025) comparing areas inside and outside of delineated economic areas. Data is aggregated into the delineated economic areas.

Source: CCT Valuation Rolls 2012 and 2025



Map C4-b: Existing economic areas.

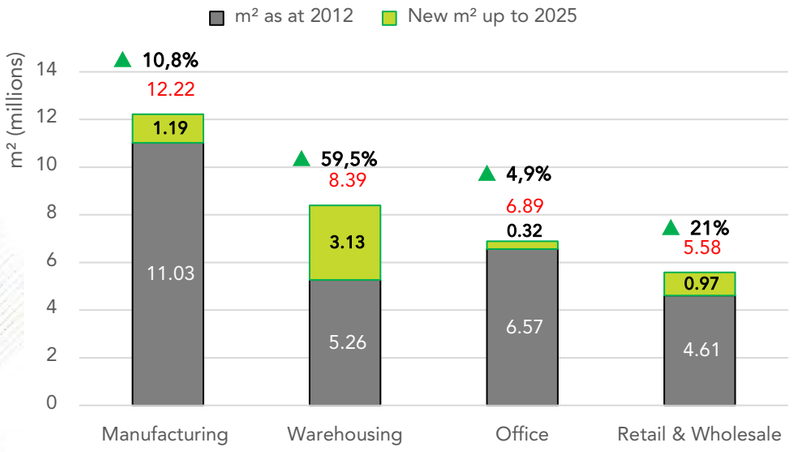
OVERVIEW

The Urban Planning and Design Department has developed economic area profiles to provide a comprehensive overview of urban economic trends across the city's key economic areas. Building on the work of the former Economic Areas Management Programme (ECAMP), these profiles use a themed approach to analyse labour market, land use, property development, and other economic indicators reported over a decade long period. These profiles aims to support informed decision-making, facilitate strategic planning and investment, and provide valuable time-series insights where such data may not be readily available to the public. The themed indicators are reflected across 70+ profiles which can be accessed on the City's website. This panel provides a summary of key analysis across all economic areas and its relevance at a metropolitan scale.

Spatial Area	2012	2025	Diff.	Ave. new m²/annum	% Growth (2012 - 2025)
	(Non-Residential building floor area (m²) in millions)				
Inside Economic Areas	30,02	37,93	7,90	0,61	26%
Outside Economic Areas	11,09	22,29	11,20	0,86	101%
Metro Total	**41,12**	**60,22**	**19,01**	**1,47**	**46%**

OVERALL TREND

Approx. 19million m² of new floor area has been added to the built up space between 2012 and 2025, reflecting a 46% increase since 2012 at a metropolitan scale. Of this total, ±7,9million m² has been constructed inside delineated economic areas, while ±11,2million m² have been constructed outside economic areas. As can be deducted from the table and graph above, as at 2025, approximately 63% of the metropolitan's total non-residential m² continue to exist inside delineated economic areas. However, the rate of increase for new non-residential floor area has developed faster outside delineated economic areas (101%) than inside (26%) suggesting higher levels of diversification occurring beyond economic areas that are within residential areas.

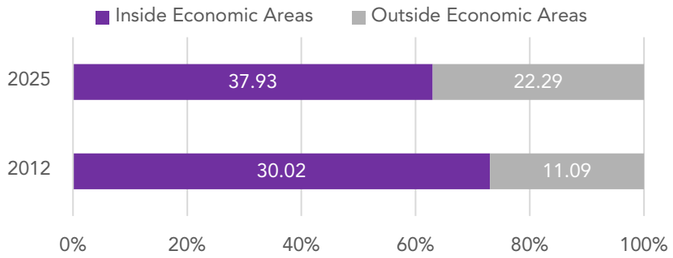


Graph C4-b (2): New floor area (m²) by key land use sectors inside all economic areas.

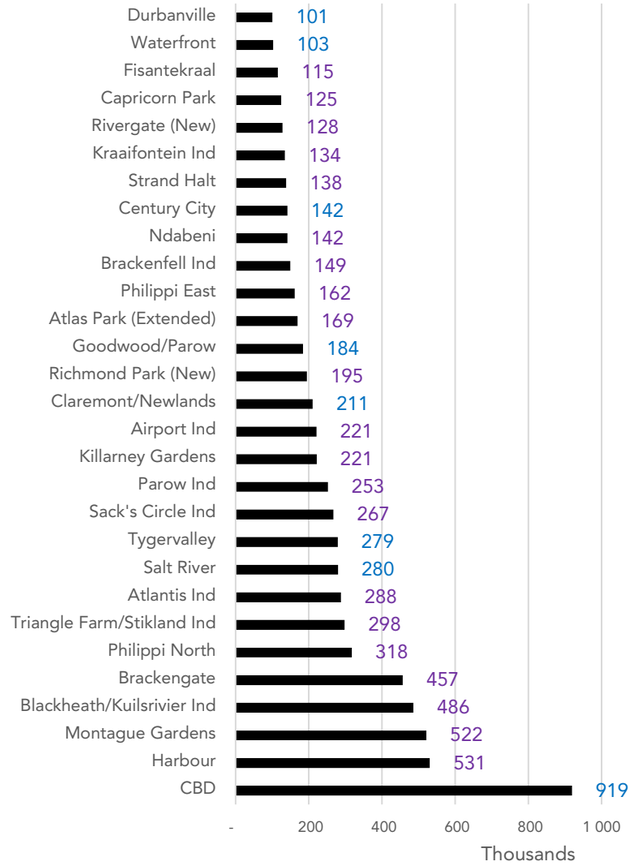
LAND USE AND LOCATIONAL TRENDS

The graph above shows growth across major land use sectors within economic areas. Manufacturing remains the largest sector by floor area, while warehousing has recorded the strongest growth since 2012.

The graph on the right highlights the economic areas that added the most new floor space between 2012 and 2025 (more than 100,000 m²), across both industrial (purple) and commercial (blue) areas.



Graph C4-b (1): Growth rate of new non-residential floor area (m²) inside vs outside economic areas.



Graph C4-b (3): New non-residential floor area > 100 000m² in economic areas between 2012 and 2025 (excl. parking).

C.4

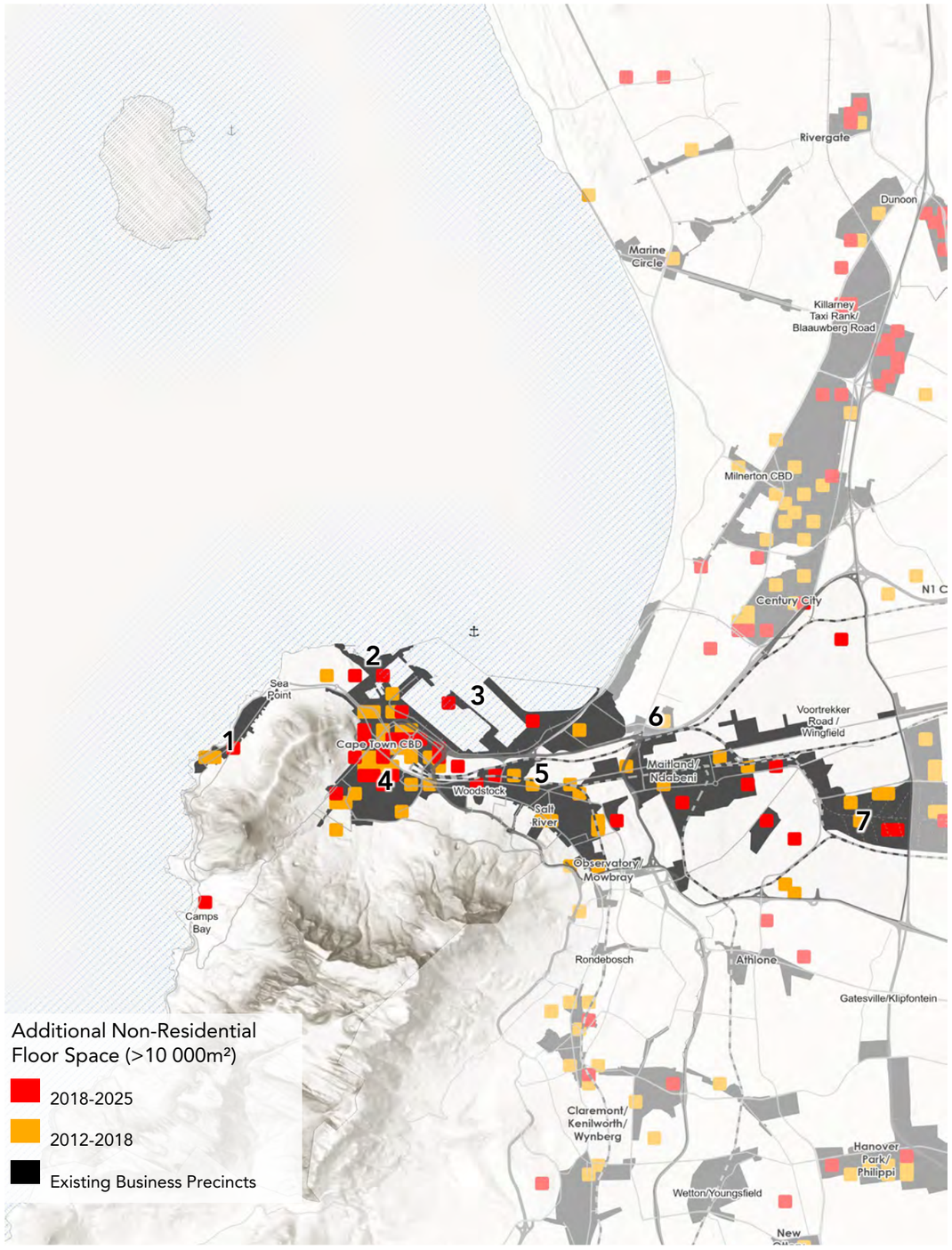
LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

2026 Update

This indicator shows the change in square metres of buildi respect of non- residential land use as captured in the City's General Valuation Rolls (2012, 2015, 2018, 2022, 2025). Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

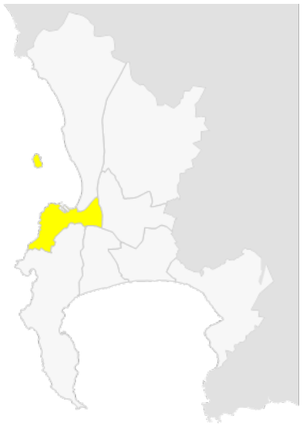
Source: CCT Valuation Rolls 2012, 2015, 2018, 2022 and 2025



Map C4-a: Table Bay: Change in non-residential land use (floor space) in m² (2012 to 2025)

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)

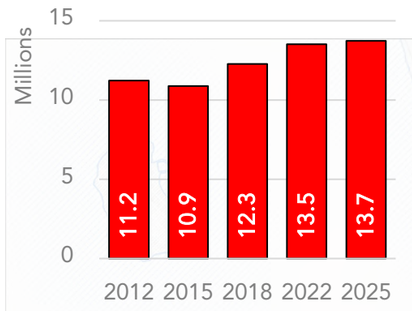


ALIGNMENT TO SPATIAL POLICY

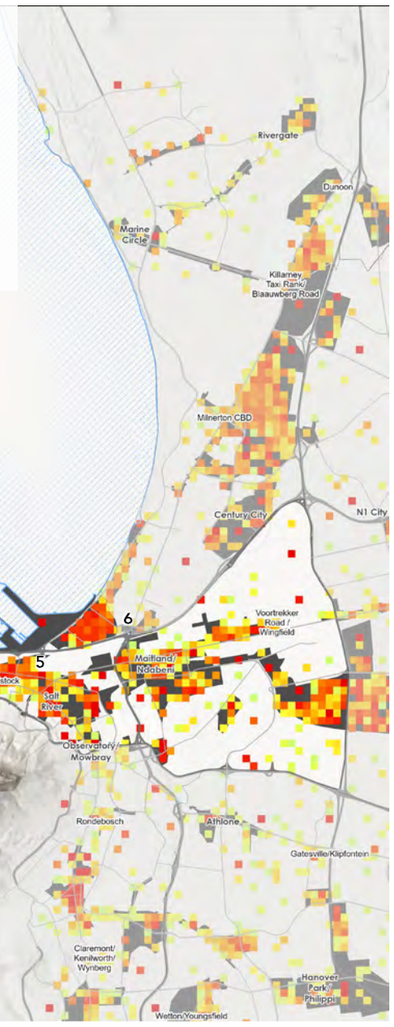
All of these non-residential (new of re-developments) are in-transit and employment-accessible, mixed-use areas, either within or in proximity to nodes and corridors and aligned to spatial planning policy (located in identified business precincts).

LOCAL LEVEL TRENDS

1. Sea Point and Green Point: are retaining and expanding street retail, with new developments maintaining a ground floor retail component. Hotel space has increased.
2. The V&A waterfront continues to diversify and expand its destination offerings, and lead innovation in green building. Examples include the relocation of the Oranjezicht market to the roof of the breakwater, and the redevelopment of the Union Castle Building.
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, and office development has increased in buildings such as 93 Bree and Ninety One.
5. Salt River and Woodstock developments, have been along Victoria Rd and within Salt River and have frequently taken the form of ground floor, street retail in mixed use buildings.
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 and have .
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 (2025)

C.4

LAND AND BUILDING DEVELOPMENT

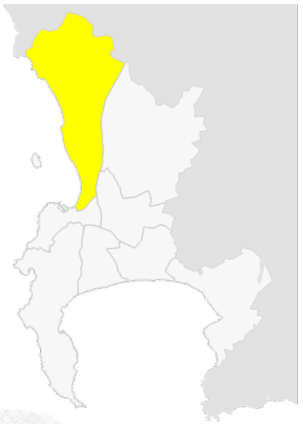
CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

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, 2025). 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 and 2025

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

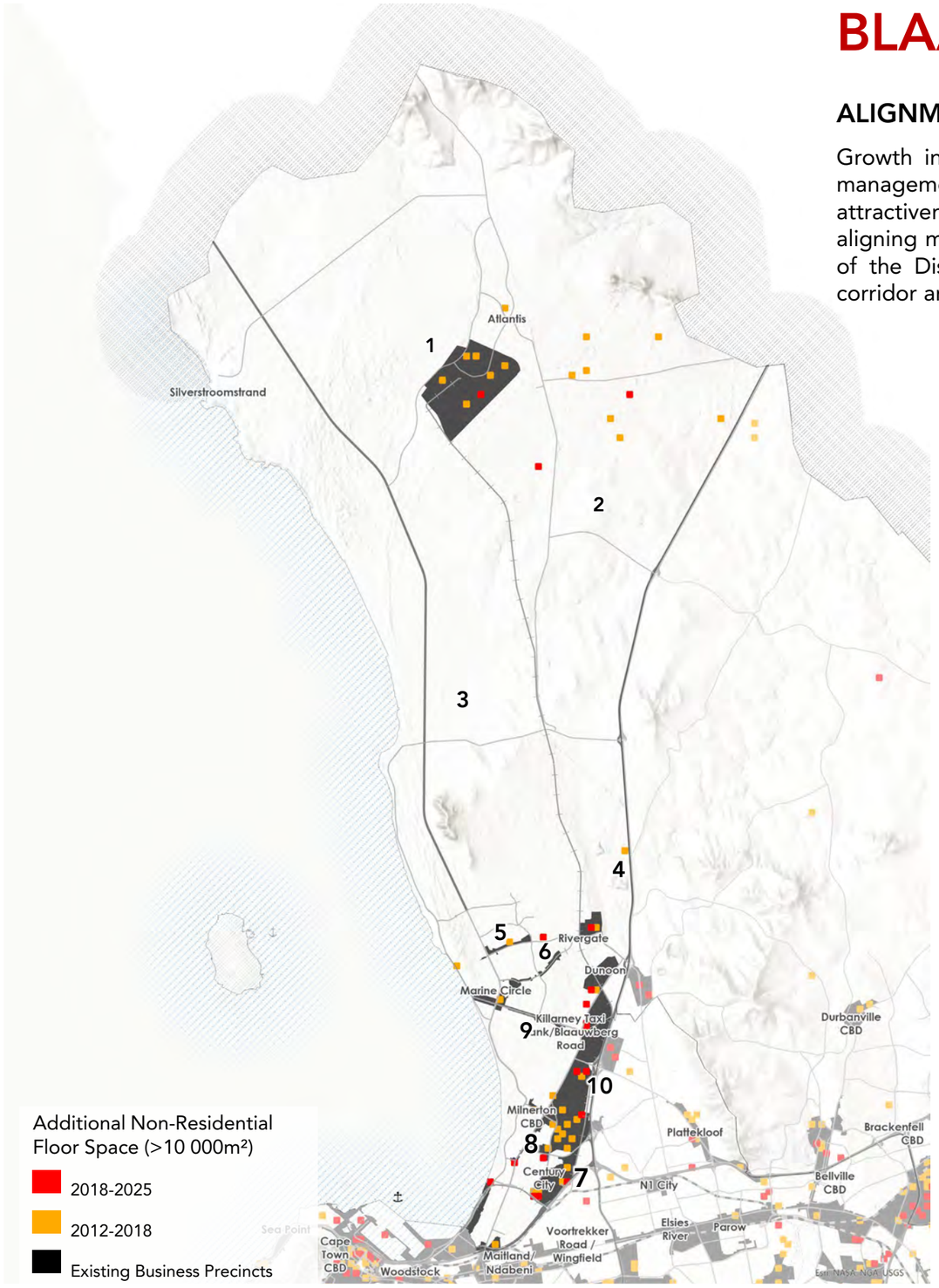


ALIGNMENT TO SPATIAL POLICY

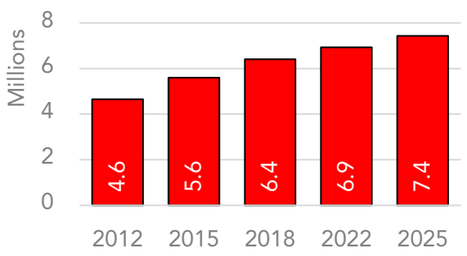
Growth in economic floor space continued in existing economic areas, and along the N7. Precinct management and active City Improvement Districts played a role in location choices of firms, driving the attractiveness of Montague Gardens and Century City. A revitalised and people centred urban form, aligning 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. Increased development along the Sandown corridor and Rivergate precinct aligns with growth potential and strategic development here.

LOCAL LEVEL TRENDS

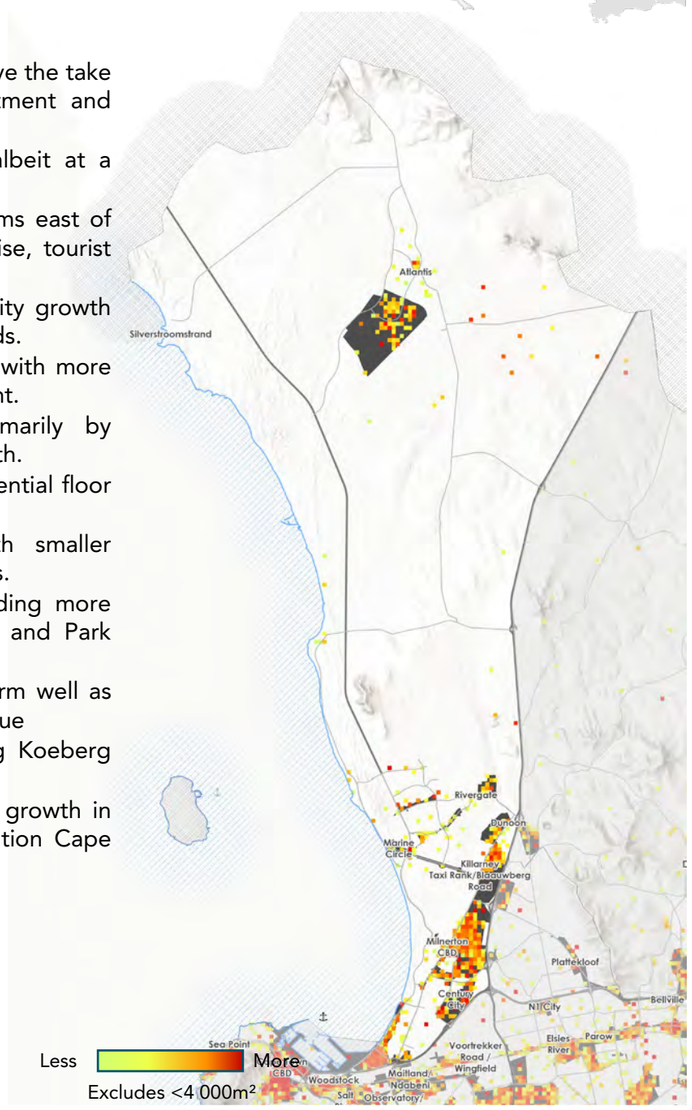
1. The Atlantis industrial incentives and Special Economic Zone drove the take up of industrial rights in this area. Future large-scale investment and unlocking of industrial land continues through SEZ.
2. The town centre of Atlantis has attracted new investment, albeit at a smaller scale.
3. The agricultural 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.
4. Visserhoek landfill site and waste beneficiation has driven facility growth and upgrades in association with the landfill site and growth needs.
5. The Rivergate industrial site continues to develop in this area, with more contemporary and flexible industrial and commercial development.
6. Retail development in the District has been driven primarily by redevelopment at shopping Centres with smaller malls in the north.
7. Parklands Main Road and Sandown Road have added non-residential floor space, typically in a car showrooms and strip malls.
8. Additional bulk along Berkshire boulevard associated with smaller shopping centres, storage facilities and mixed use sports grounds.
9. Century City continues to take up their basket of rights, adding more hospitality and recreation components. Including the Bridges and Park Place Skywater, associated with Ratanga Park .
10. Paarden Eiland North and Killarney Gardens continue to perform well as industrial areas - including Indlovu Logistics Park & 7 Chain Avenue
11. Residential to business conversion along key routes, including Koeberg and Blaauwberg Road.
12. Warehousing and digital economy are drivers of development growth in Montague Gardens. Large new developments like Auction Nation Cape Town next to the N7.



Map C4-a: Blaauwberg: Change in non-residential land use (floor space) in m² (2012 to 2025)



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



Map C4-b: Blaauwberg: Non-residential land use (floor space) in m² (2025)

C.4

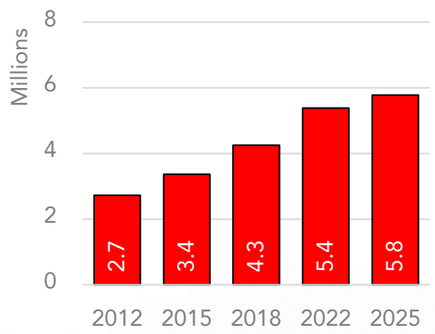
LAND AND BUILDING DEVELOPMENT

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, 2022,2025). 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 and 2025

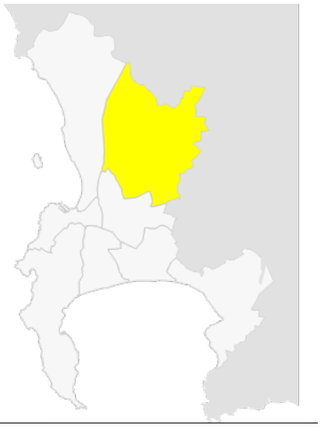
Graph C4-a: Northern: Formal non-residential building extent (m²)



Map C4-a: Northern: Change in non-residential land use (floor space) in m² (2012 to 2025)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)

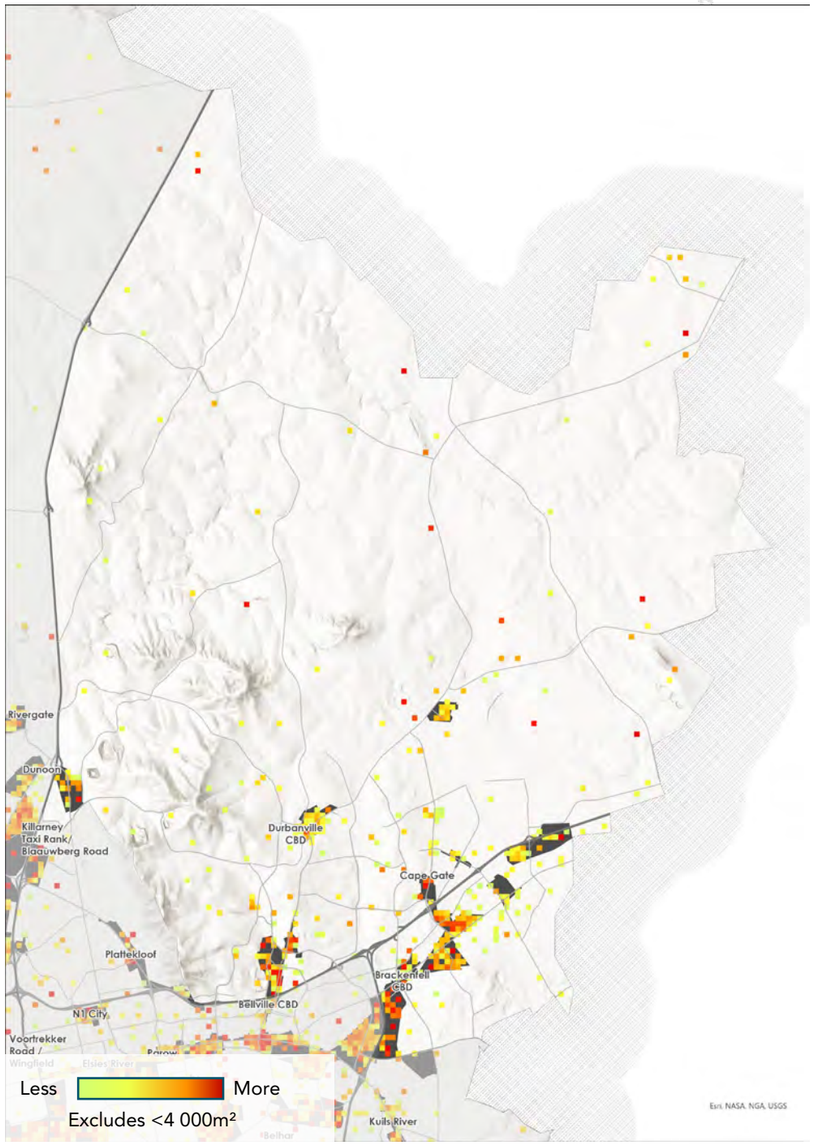


ALIGNMENT TO SPATIAL POLICY

In the majority of instances, the changes in non-residential development between 2012 and 2025 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 2023 Northern District Plan.
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 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 Plan.
7. Fisantekraal Industrial Area: Development of industrial and related uses in the area earmarked for such use in the 2023 Northern District Plan. Development of Groot Phesantekraal area is also being implemented in phases including retail, residentila and community uses.
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.



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

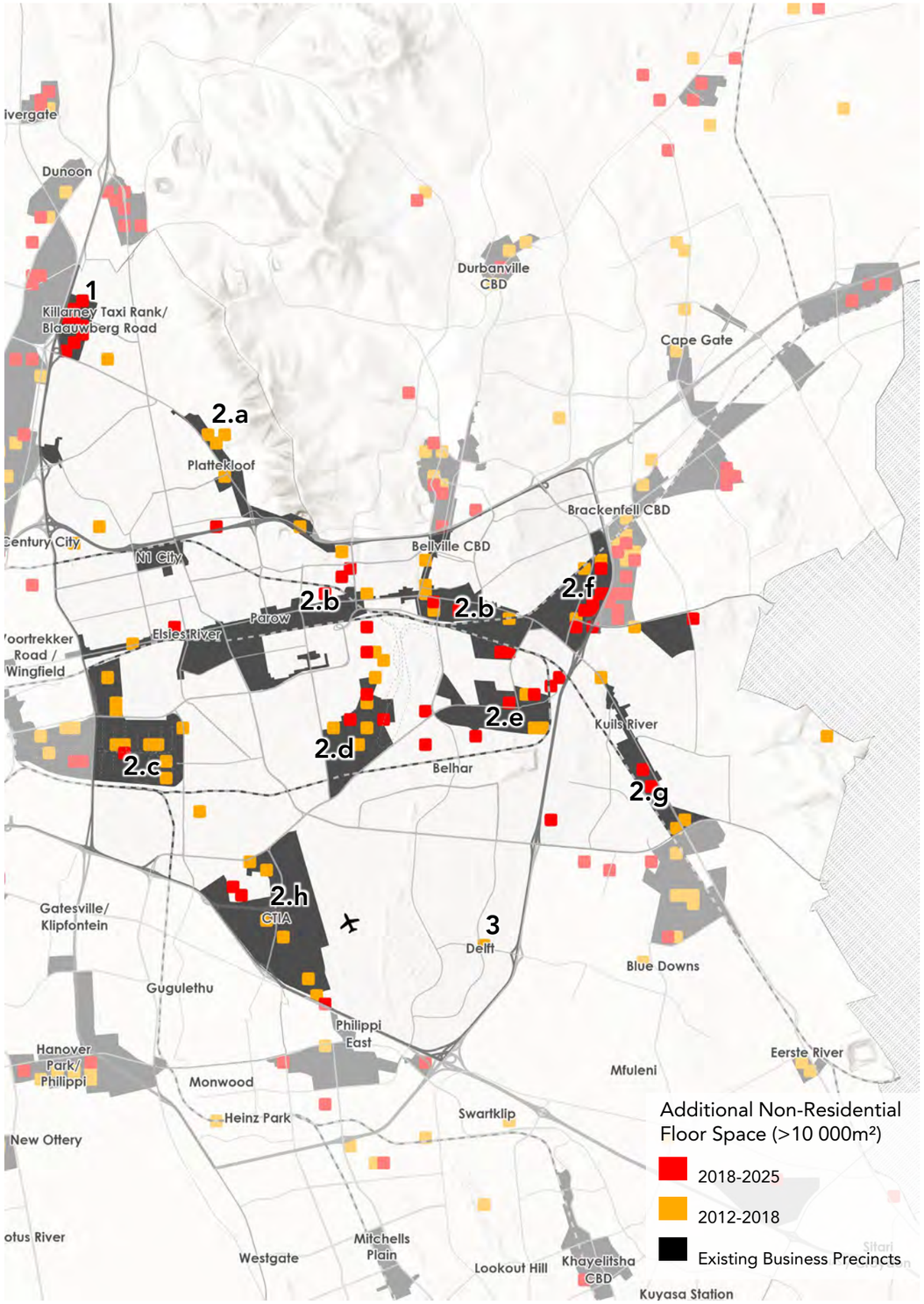
C.4

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, 2022,2025). Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

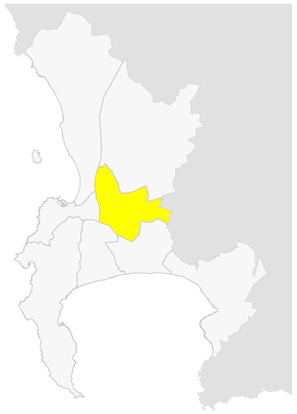
Source: CCT Valuation Rolls 2012, 2015, 2018, 2022,2025



Map C4-a: Tygergberg: Change in non-residential land use (floor space) in m² (2012 to 2025)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



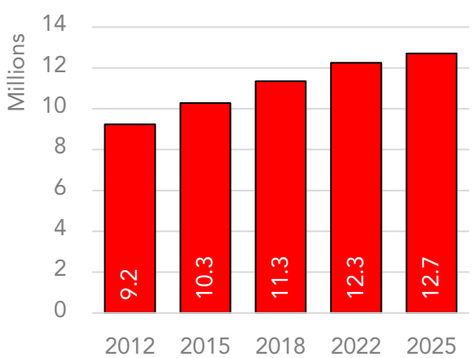
ALIGNMENT TO SPATIAL POLICY

Significant increases in non-residential development between 2012 and 2025 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.

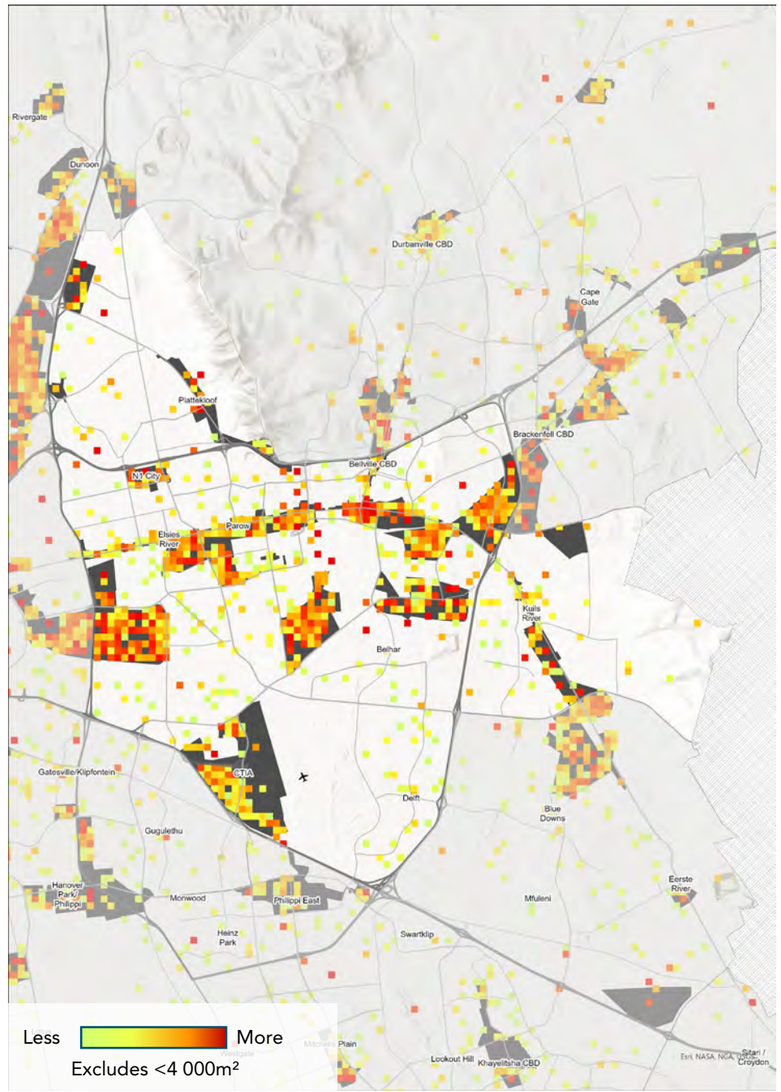
LOCAL LEVEL TRENDS

The section below highlights the areas where a substantial change in non-residential development has been noted between 2012 and 2025.

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. Platteklooof 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).



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



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

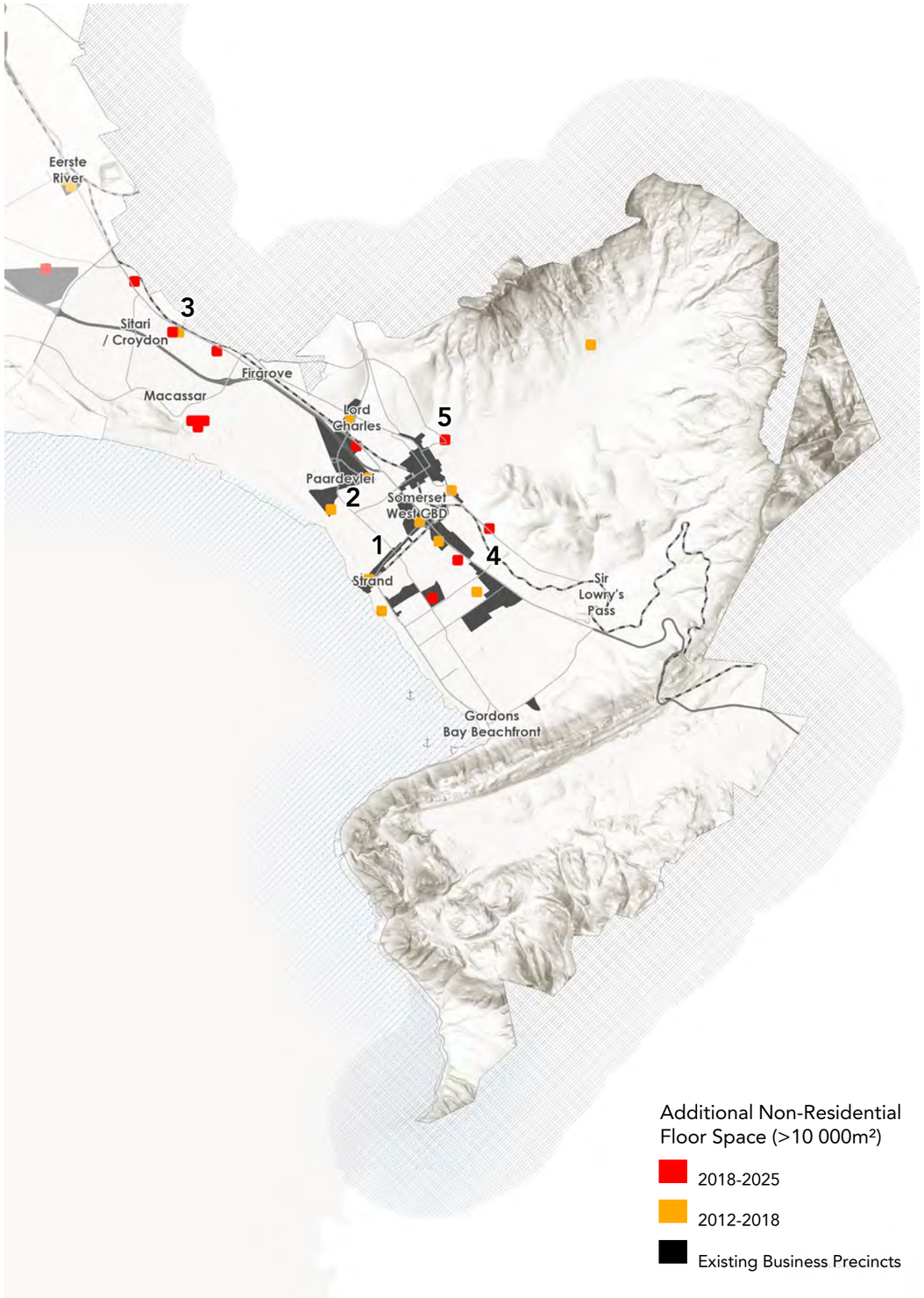
C.4

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, 2025). 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, and 2025



Map C4-a: Helderberg: Change in non-residential land use (floor space) in m² (2012 to 2025)

DISTRICT LEVEL ANALYSIS

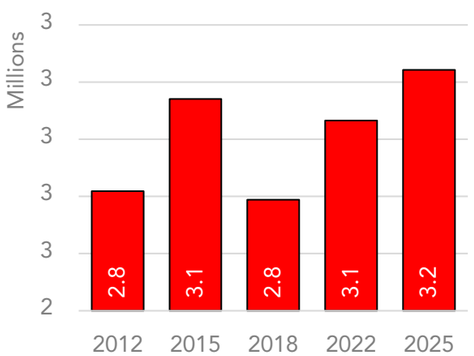
HELDERBERG DISTRICT (E)

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.

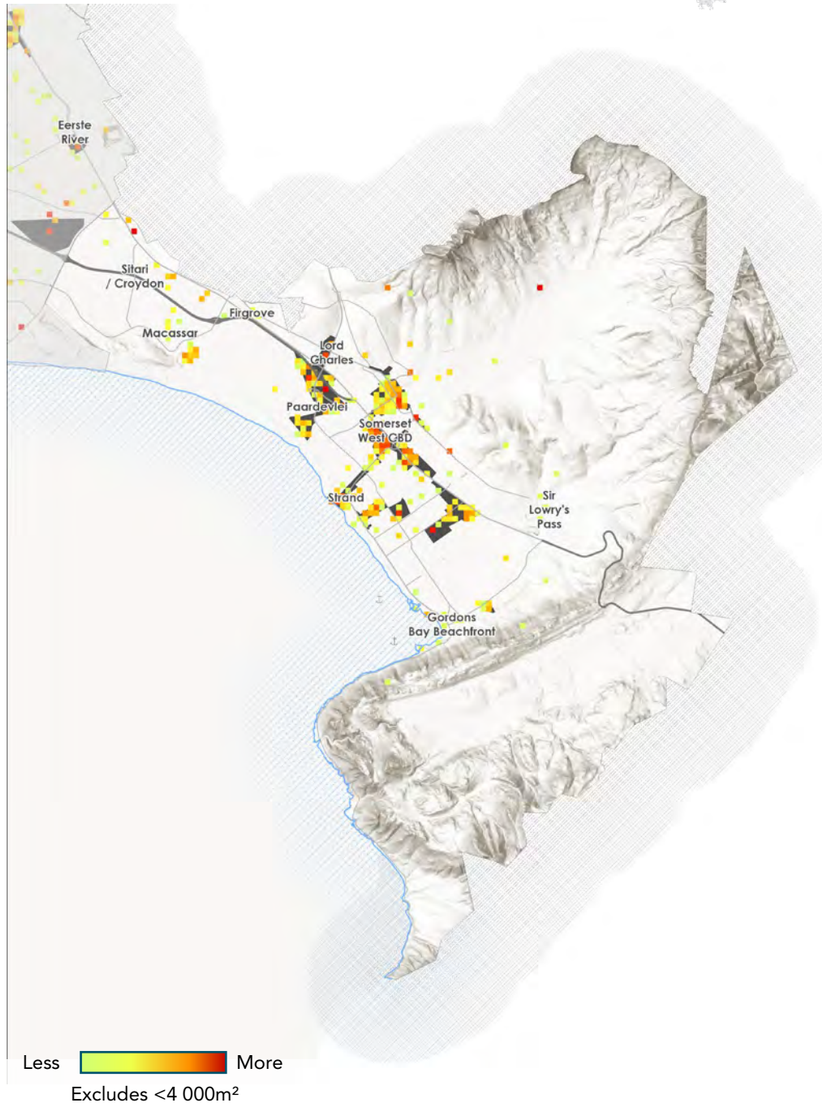
LOCAL LEVEL TRENDS

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, as well as Croydon, which experienced increases in local eateries and other minor retail developments.
4. Due to the possible N2 realignment, there has been an increase in non-residential land uses in the form of shopping complexes, offices, businesses and schools that were developed along the existing N2 which will become the T2 in future.
5. Lourensford Road has experienced an increase in conversion from residential to non-residential in the form of offices, local cafes, etc.



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





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

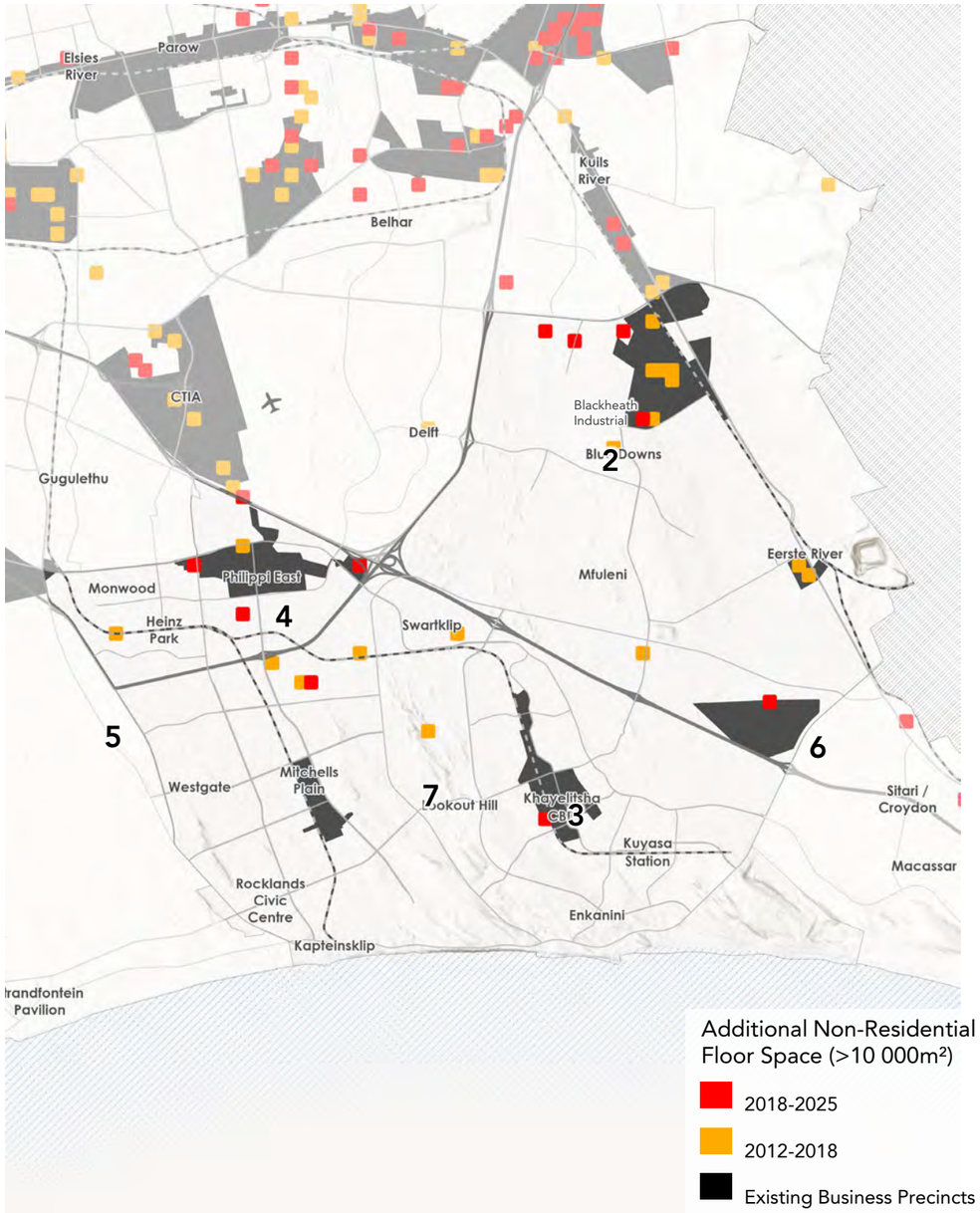
C.4

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, 2022,2025). 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 and 2025



Map C4-a: KMPGBD: Change in non-residential land use (floor space) in m² (2012 to 2025)

Recorded non-residential floor space increased from approximately 2.6 million m² in 2012 to 4.0 million m² in 2025. However, the latest figures show a slight decline from approximately 4.1 million m² in 2022. The district therefore shows substantial growth over the full period, but a small reduction in recorded floor space between 2022 and 2025.

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)

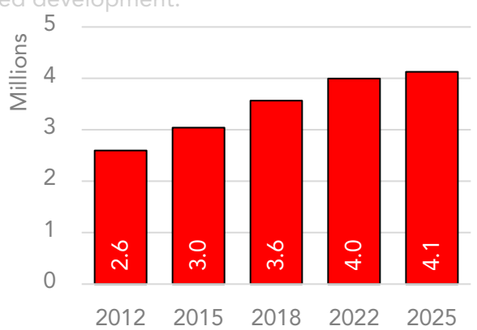


ALIGNMENT TO SPATIAL POLICY

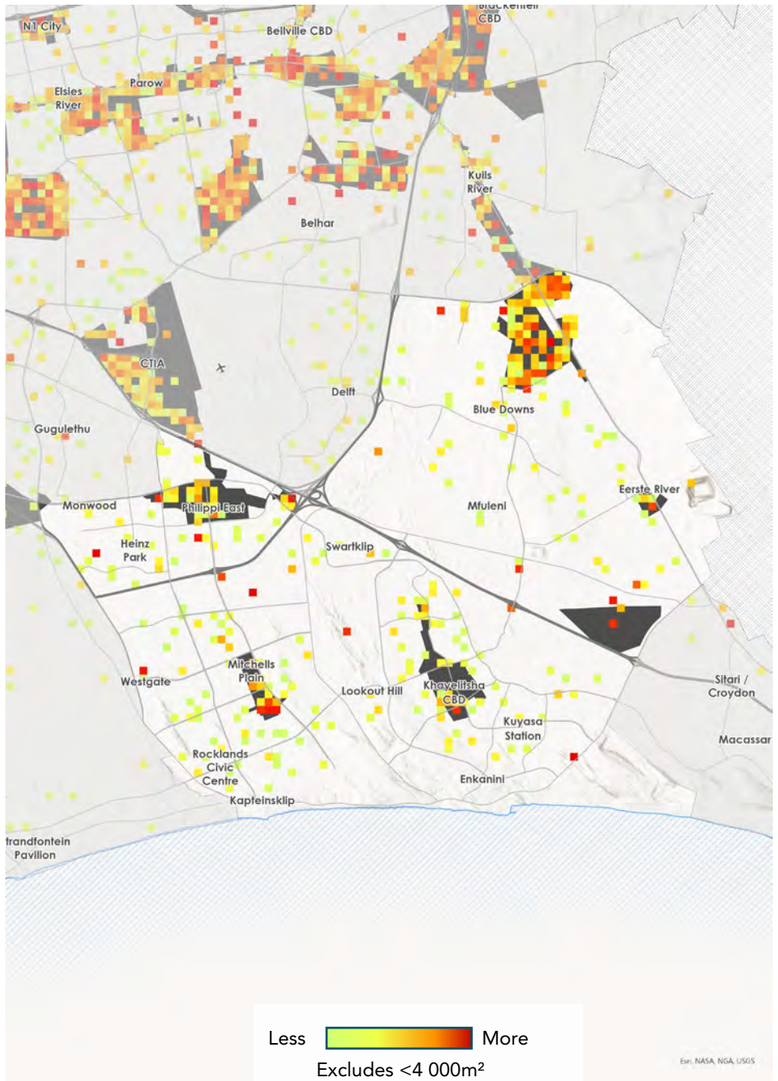
Non-residential development remains concentrated in Blackheath, Philippi East and established district centres. Additions within these areas broadly support the DSDF approach to strengthening employment nodes and mixed-use intensification. However, growth elsewhere remains scattered, with limited concentrations across much of the residential area. Expanding local economic opportunities will require suitable land and supporting infrastructure.

LOCAL LEVEL TRENDS

1. **Blackheath and Blue Downs:** Blackheath remains the district's largest concentration of recorded non-residential floor space. Additions occur within and around the industrial precinct, while development elsewhere in Blue Downs is more dispersed.
2. **Khayelitsha CBD and surrounds:** Additions are visible within the established CBD. Recorded floor space elsewhere in Khayelitsha remains scattered, indicating a limited spread of larger non-residential developments beyond the centre.
3. **Philippi East:** The maps show an established concentration of non-residential activity and further additions over the period. This reinforces its importance as an employment area within the district.
4. **Weltevreden Valley and Mitchells Plain:** Recorded floor space is distributed across established centres and smaller concentrations within the residential area. The change map shows scattered additions rather than extensive new concentrations.
5. **Eersteriver South and the film precinct:** Additional non-residential floor space is visible within the precinct. This strengthens the area's role as a location for economic activity.
6. **Swartklip and surrounds:** The maps show some additions around the precinct. Future development offers an opportunity to expand local economic activity, although proposed land packaging must be distinguished from completed development.



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



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

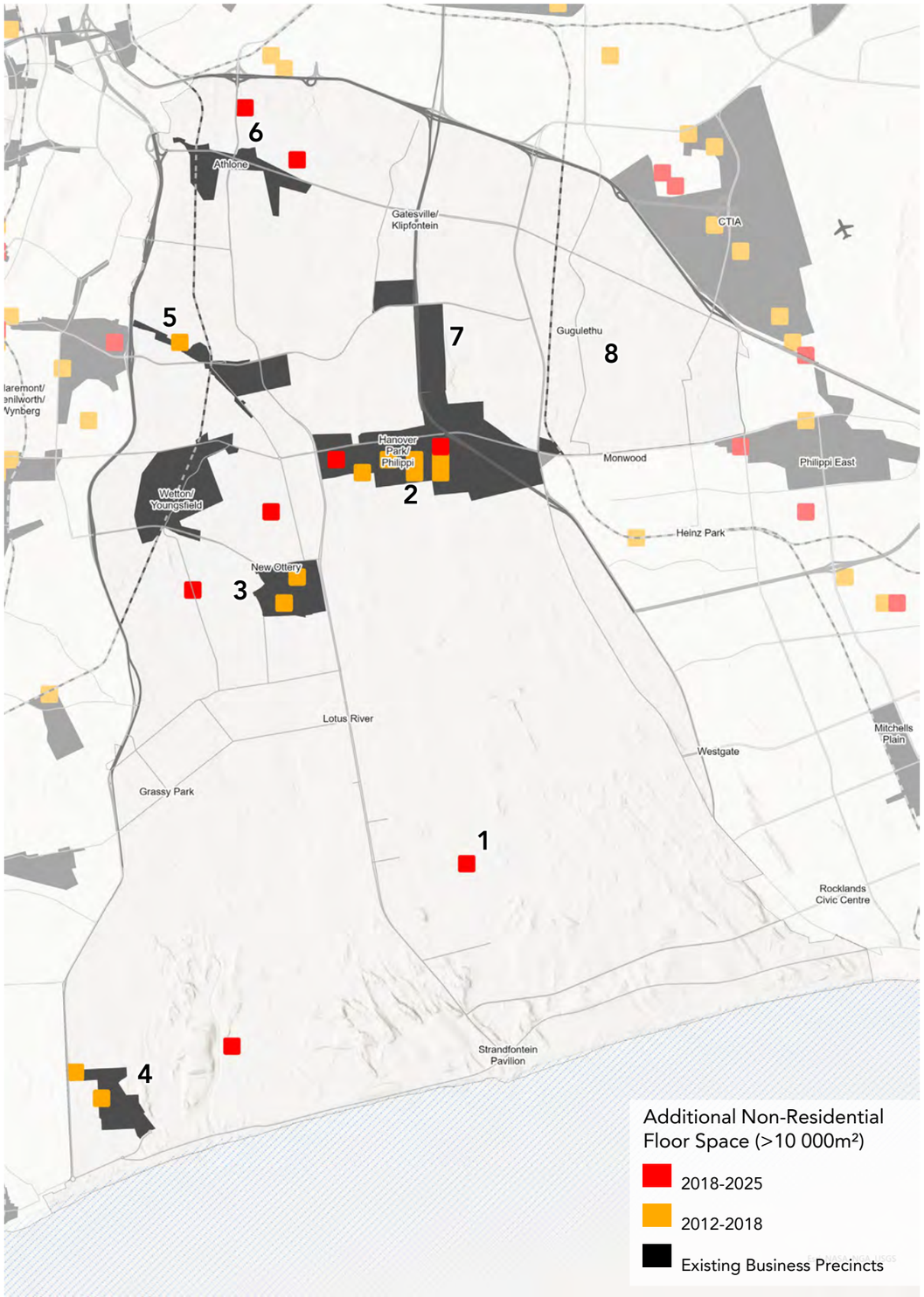
C.4

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, 2025). 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 and 2025



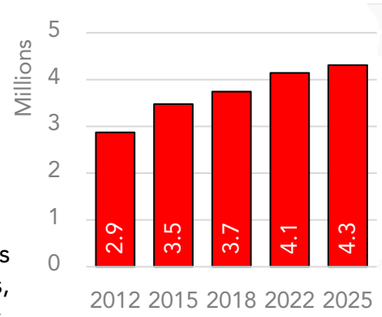
Map C4-a: Change in non-residential land use (floor space) in m² (2012 to 2025)

DISTRICT LEVEL ANALYSIS

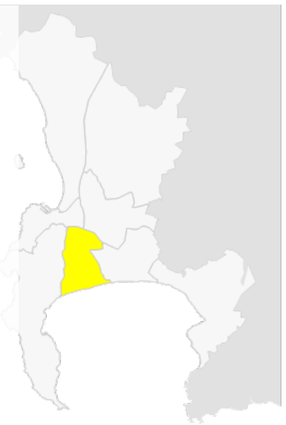
CAPE FLATS DISTRICT (G)

ALIGNMENT TO SPATIAL POLICY

Most new non-residential floor space between 2012 and 2025 has been added within existing industrial and business precincts, nodes, mixed-use intensification areas and development corridors, in line with spatial policy. The main exception is utility infrastructure in the PHA. Formal non-residential floor space grew from 2.9 million m² in 2012 to 4.3 million m² in 2022, before declining slightly to 4.1 million m² in 2025. Growth is concentrated in a few established precincts, while the higher-density residential areas of Gugulethu and Nyanga have seen only small-scale additions.



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



LOCAL LEVEL TRENDS

[1] In the PHA, an electricity substation and water treatment facility have been added within the Areas of Agricultural Significance. While not a targeted area, this is necessary service infrastructure.

[2] The Lansdowne industrial area (Philippi North) has absorbed the largest share of new floor space, mostly before 2018, but there has been additional non-residential floor space between 2018-2025, reinforcing its designated role as an industrial area and district node.

[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.

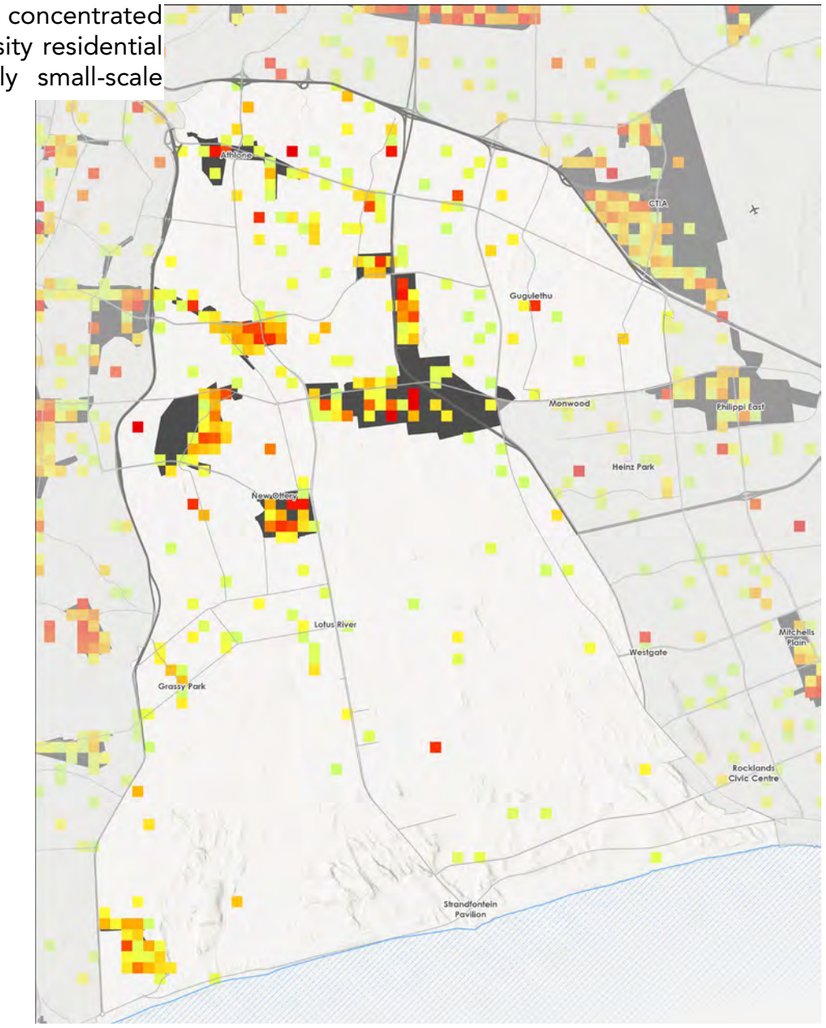
[4] Capricorn Park has consolidated as an industrial precinct through light industrial development in the Capricorn Business and Technology Park. A new school and shopping centre extension along Prince George Drive, with housing planned, align with the mixed-use and residential NDA.

[5] Along Imam Haron Road in Lansdowne, non-residential development aligns with the mixed-use intensification designation.

[6] Athlone shows the most notable recent growth (2018 to 2025) outside the existing business precinct, suggesting expansion of the economic precinct in the Athlone CBD.

[7] In Hatton and Primrose Park, smaller-scale growth is contained within the local node, an established mixed-use precinct as seen in Map C4-b.

[8] Gugulethu has seen smaller-scale growth at the centre of the local node, which remains modest relative to the area's residential growth as indicated on Map C4-b.



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

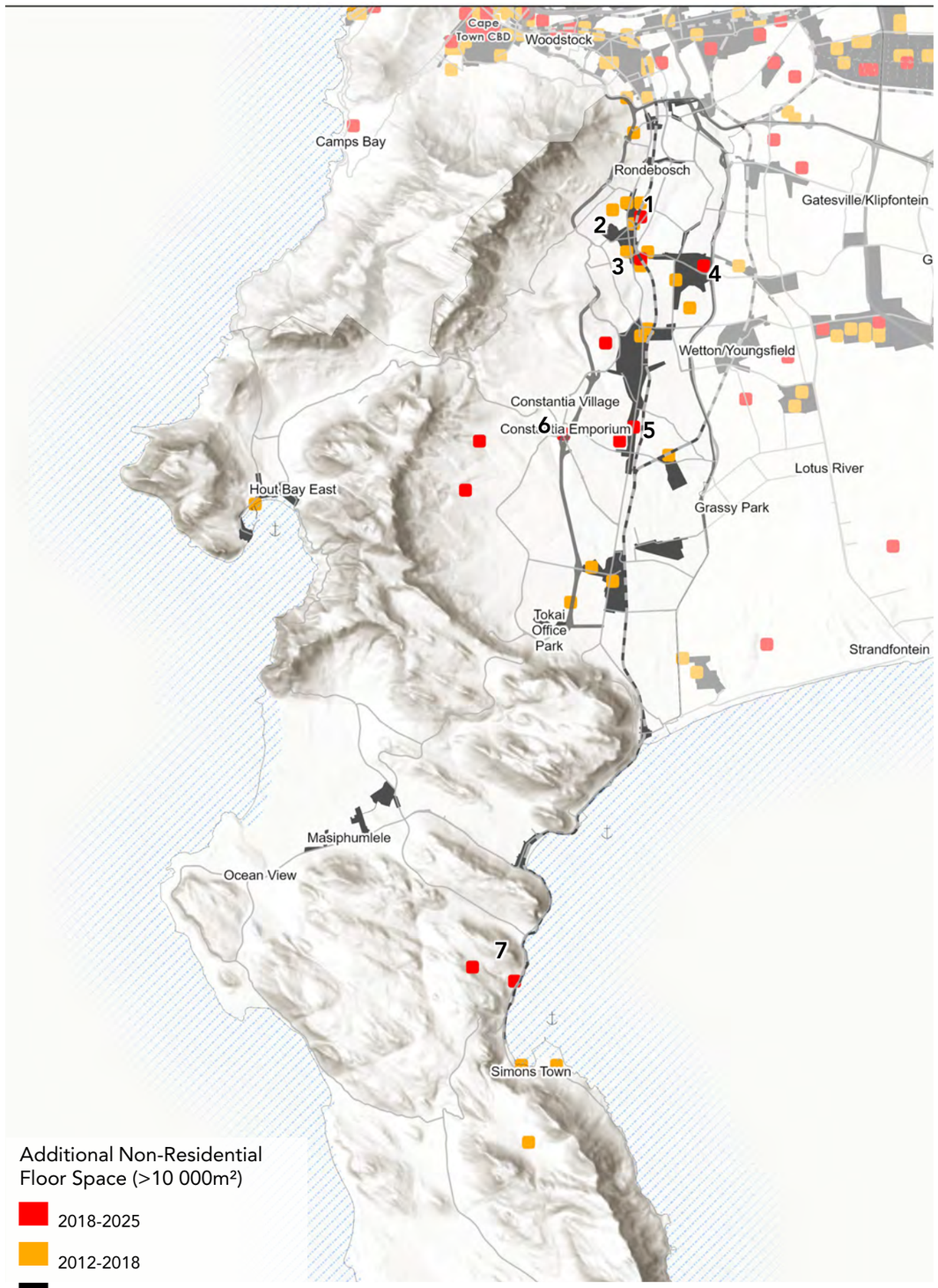
C.4

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, 2025). Data is aggregated by using a square grid comprised of 4 ha (200 m x 200 m) grid cells.

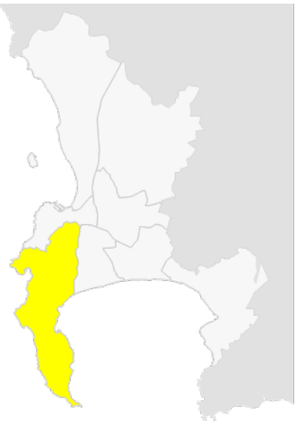
Source: CCT Valuation Rolls 2012, 2015, 2018, 2022 and 2025



Map C4-a: Southern: Change in non-residential land use (floor space) in m² (2012 to 2025)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)



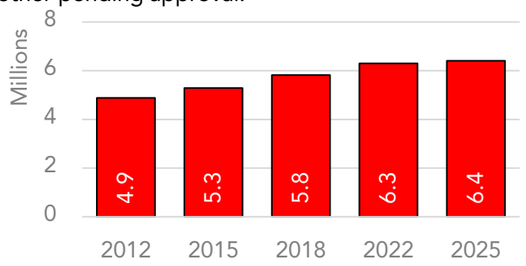
ALIGNMENT TO SPATIAL POLICY

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.

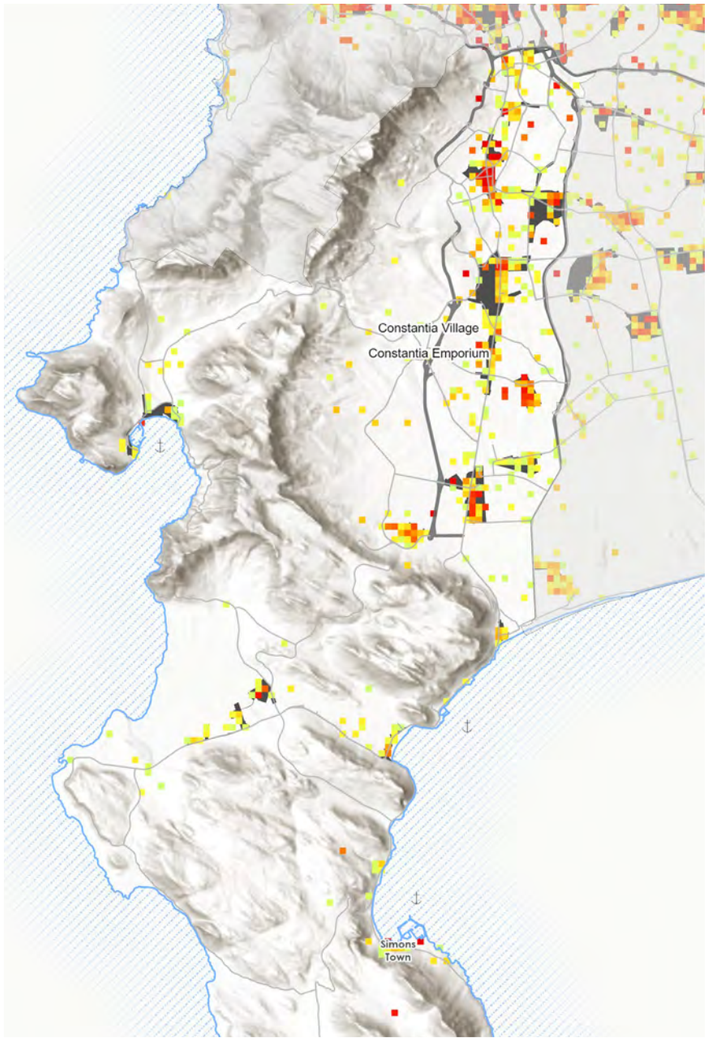
LOCAL LEVEL TRENDS

The most 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 to establish 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. Blue Route: Upgrade to the mall.
8. Sun Valley: Upgrade to the 'Checkers' mall.
9. 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), comprising new mixed development begun in 2017 and still ongoing. This includes retail, office, residential, and a small private-sector hospital.
10. A number of new (mainly private) schools throughout the district, including in Hout Bay, Claremont, Imhoff's Gift, with other pending approval.



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



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

C.4

LAND AND BUILDING DEVELOPMENT

CHANGE IN NON-RESIDENTIAL LAND USE (DISTRICT)

KEY TAKE-AWAY TRENDS:

- **Non-residential development increased substantially between 2012 and 2025, rising from approximately 41 million m² to 60 million m² of floor area,** with much of this growth reinforcing established industrial and business locations.

- **Growth remained concentrated in major economic nodes and corridors,** including the Cape Town CBD, Century City, Bellville, Epping, Somerset West CBD, CTIA, the N7 Corridor, Voortrekker Road and the Southern Corridor.

- **Established economic areas remain the dominant locations for economic activity**, containing approximately 65% of total non-residential floor area in 2025, with significant growth in areas such as the CBD, Harbour, Montague Gardens, Brackengate, Blackheath/Kuils River and Philippi.

- **Non-residential growth outside established economic areas is occuring more rapidly**, with floor space outside economic areas increasing by approximately 82%, compared with 26% within economic areas, indicating increasing diversification into residential and mixed-use areas.

- **Warehousing has been the fastest-growing non-residential land-use sector**, while manufacturing remains the largest by total floor area, reflecting continued industrial activity alongside expanding logistics and distribution functions.



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

Map C4-a: Change in non-residential land use (floor space) in m² (2012 to 2025)

Map C4-b: Non-residential land use (floor space) in m² (2025)

C.5

LAND AND BUILDING DEVELOPMENT
DIVERSITY OF USE

2026 Update

This indicator shows the change in land use diversity by comparing the floo residential (RES) and formal non-residential (NRES) land uses as captured in the City's General Valuation Rolls (2012, 2015, 2018, 2022 and 2025). 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, 2025

OVERALL TREND

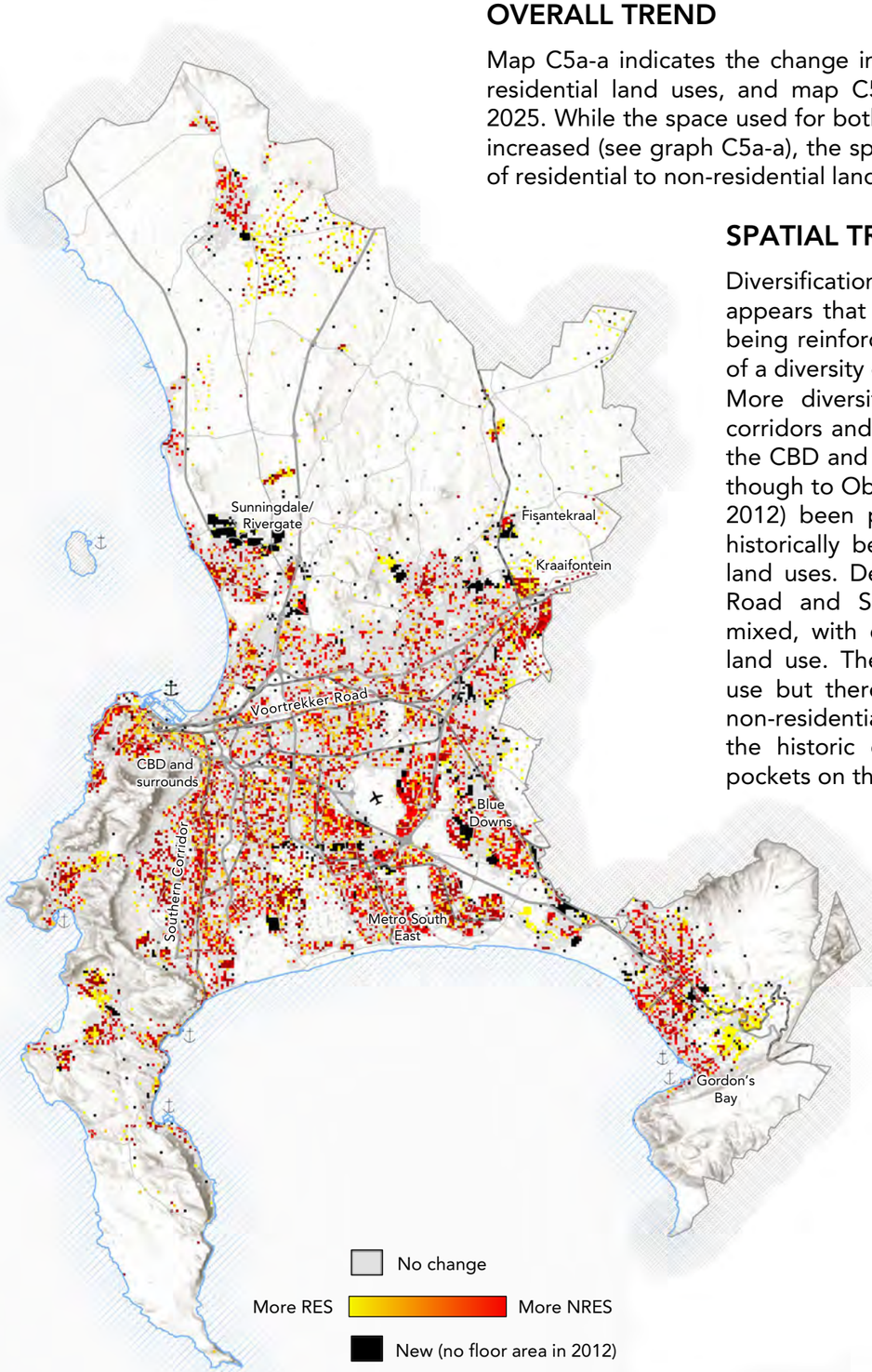
Map C5a-a indicates the change in the ratio between residential and non-residential land uses, and map C5a-b indicates the land use diversity in 2025. While the space used for both residential and non-residential land use increased (see graph C5a-a), the spatial distribution thereof affects the ratio of residential to non-residential land use in specific locations.

SPATIAL TREND (DISTRIBUTION/ PATTERN)

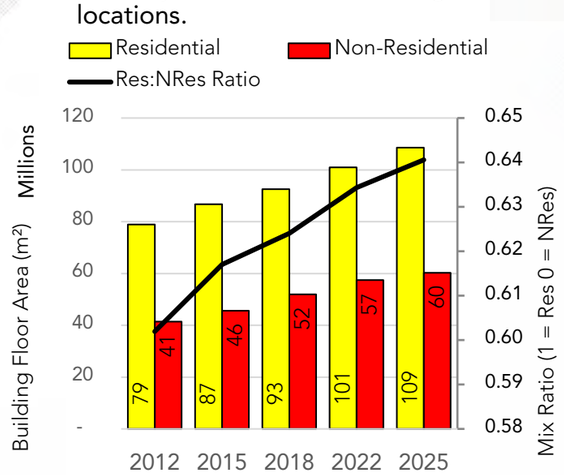
Diversification of use occurs on a city-wide scale. It appears that the existing land use diversity is largely being reinforced, which points to a greater clustering of a diversity of activities.

More diversification occurred around development corridors and in nodes. Map C5a-a highlights shifts in the CBD and surrounding inner city areas (Woodstock though to Observatory) where development has (since 2012) been predominantly residential, in what have historically been areas dominated by non-residential land uses. Development along both the Voortrekker Road and Southern Main Road corridors remains mixed, with concentrated pockets of non-residential land use. The Metro South East shows very diverse use but there has been an increase / shift towards non-residential uses in this period. This is likely due to the historic dominance of residential uses. Several pockets on the periphery show a distinct increase in residential development – these are areas where previously uses were peri-urban related.

These observations align with policy guidance that seeks to diversify land use in strategic locations.



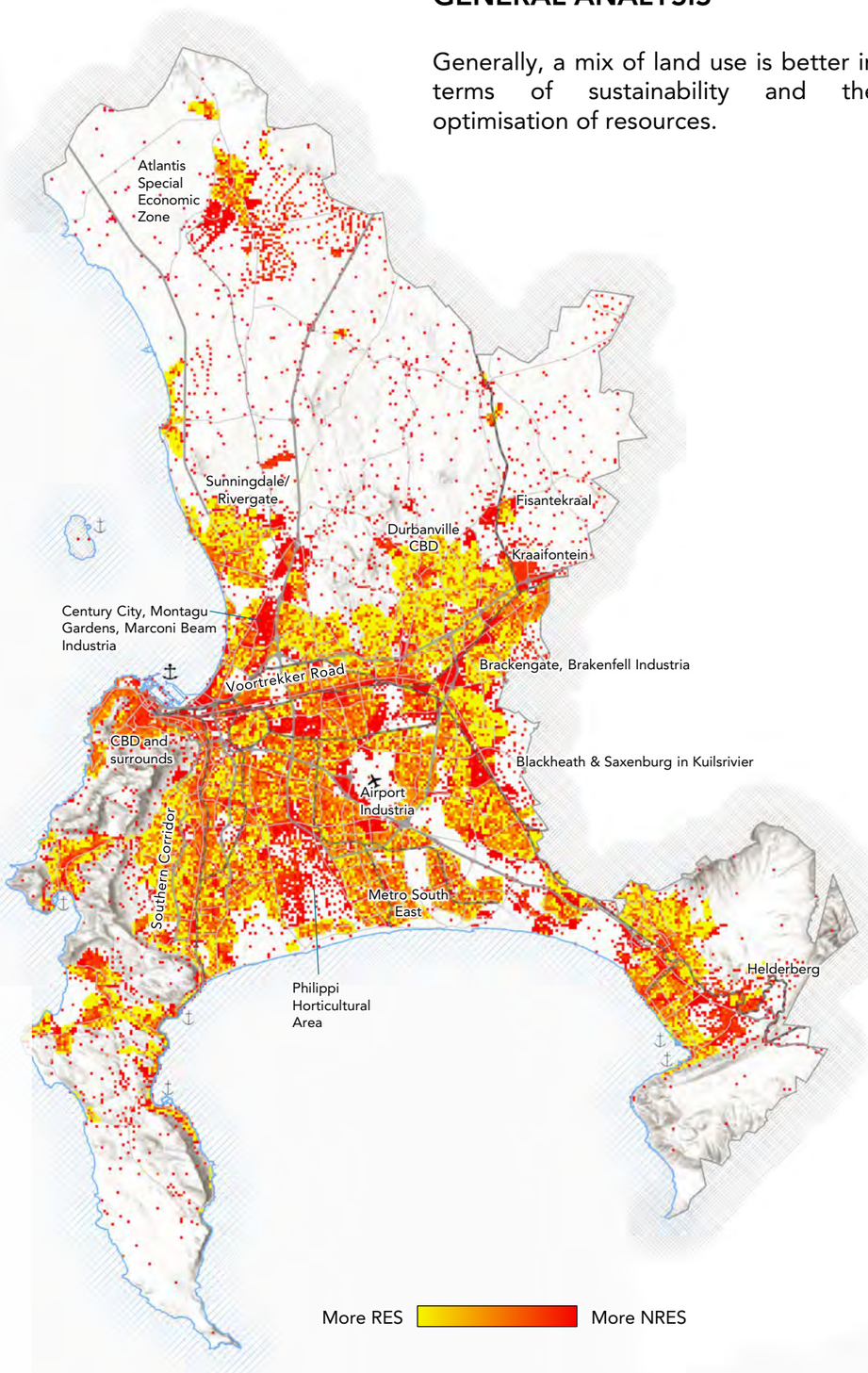
Map C5a-a: Change in land use diversity (2012 to 2025)



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 (2025)

C.5a

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, 2025 (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 2025



Map C5d-a: Areas with diverse land use



Map C5d-b: Building density



Map C5d-c: Non-residential intensity



Map C5d-d: Residential density

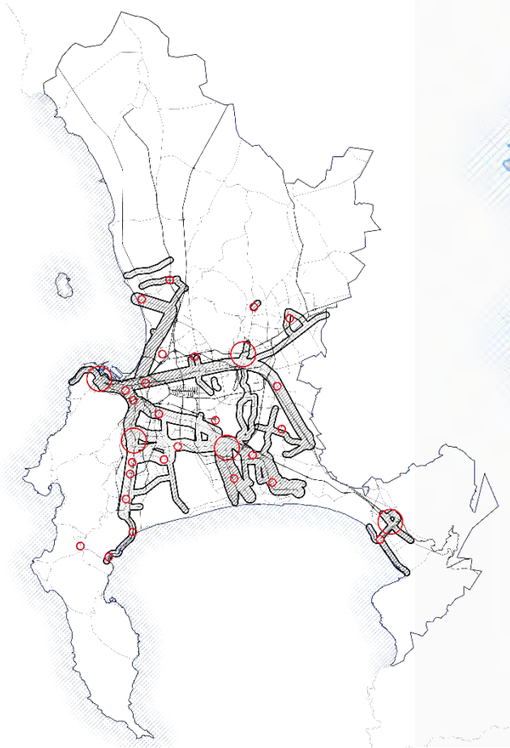
GENERAL ANALYSIS

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).

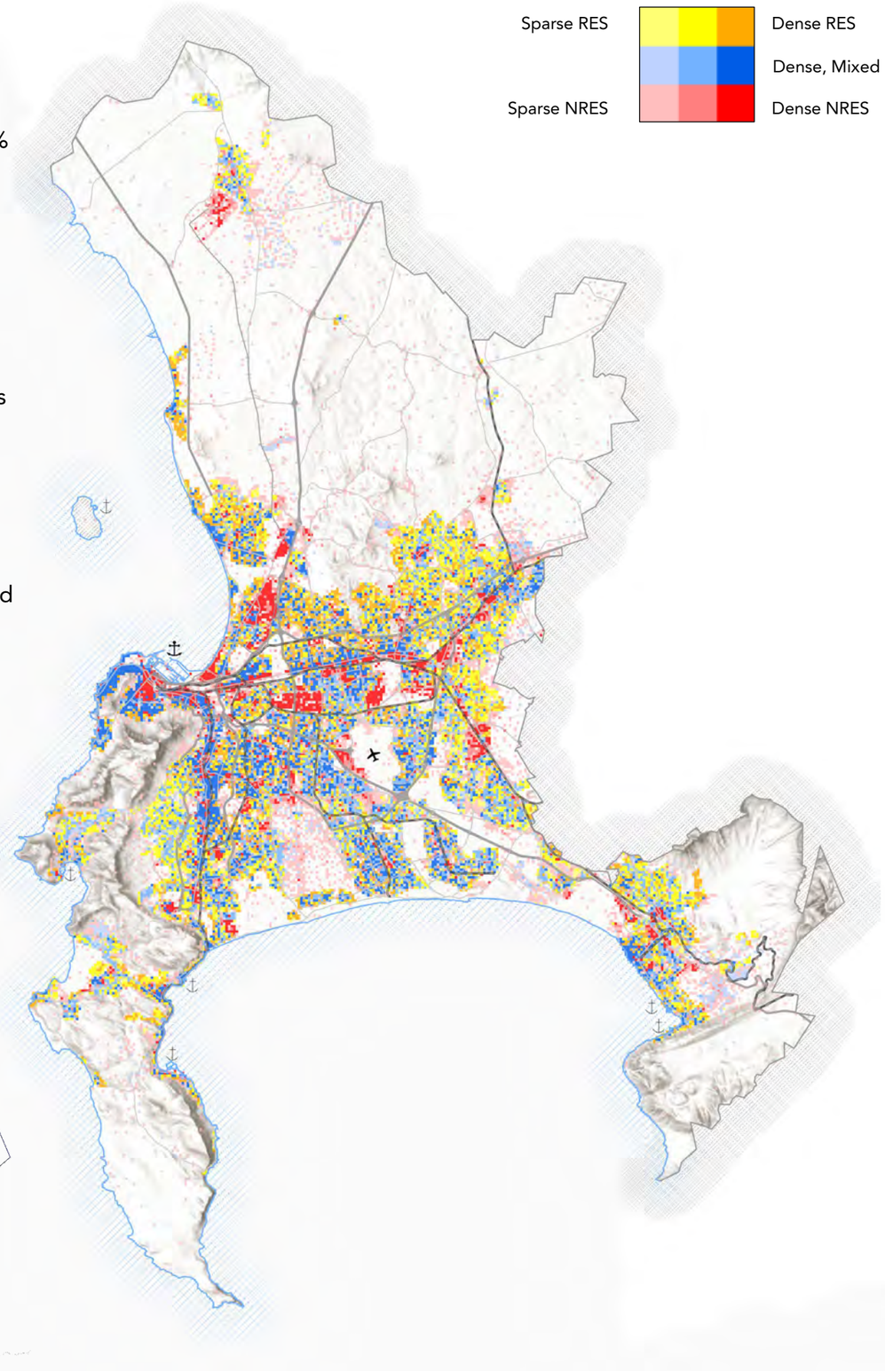
It is evident that strong spatial patterns representing spatial clustering of land use/activities and land use intensity exist.

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, 2023)



Map C5d-f: Bivariate analysis of land use diversity and intensity (2025)

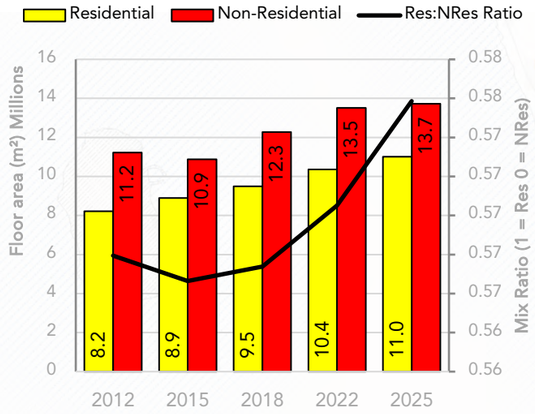
C.5c

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 and 2025)

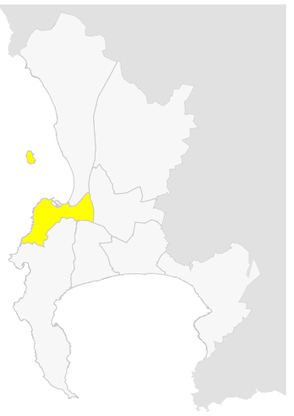


Graph C5c-a Table Bay: Change in non-residential to residential ratio

Map C5c-a: Table Bay: Change in land use diversity (2012 to 2025)

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)



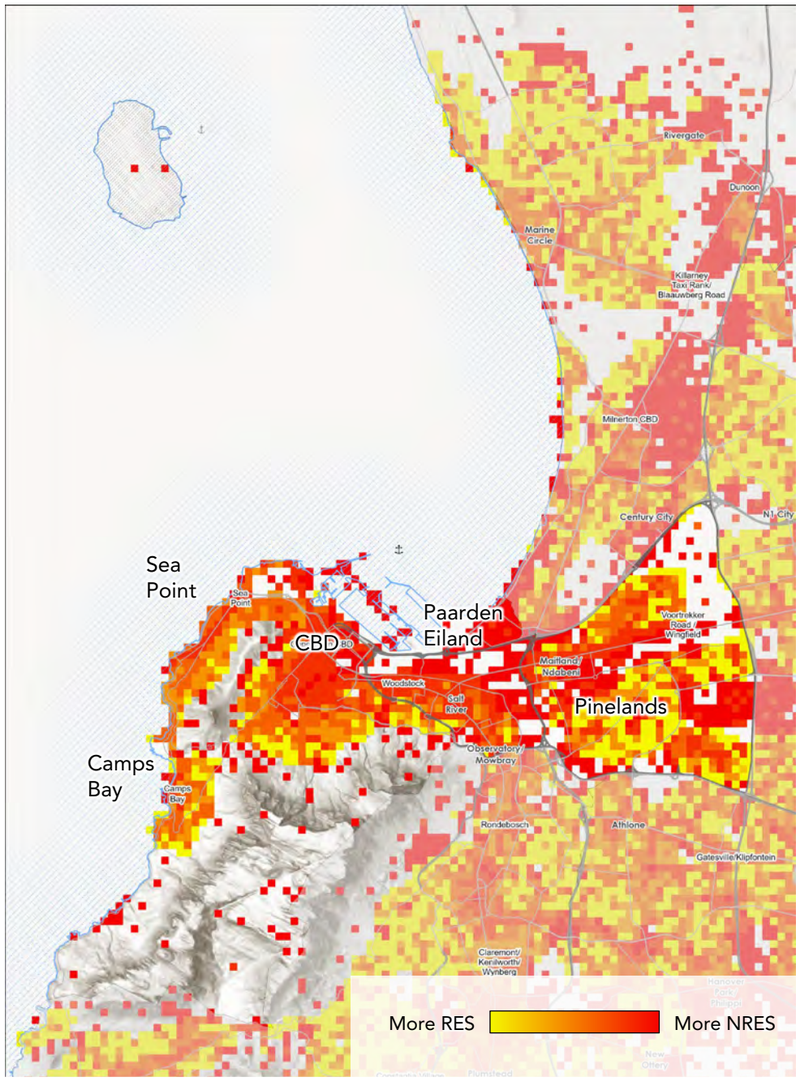
ALIGNMENT TO SPATIAL POLICY

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.
2. CBD/Foreshore – Grade 3 office conversion to residential are in construction or completed 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).
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. Consent uses for skate parks, climbing gyms and other niche entertainment businesses continues.
5. Maitland – Cube 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).
6. Waterfront – Granger Bay EIA and rezoning application, significant additional bulk in the precinct expected.



Map C5c-b: Table Bay: Residential vs Non-Residential land use (2025)

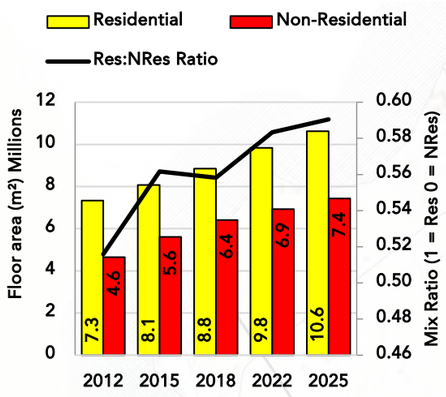
C.5c

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 and 2025)



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

Map C5c-a: Blaauwberg: Change in land use diversity (2012 to 2025)

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)

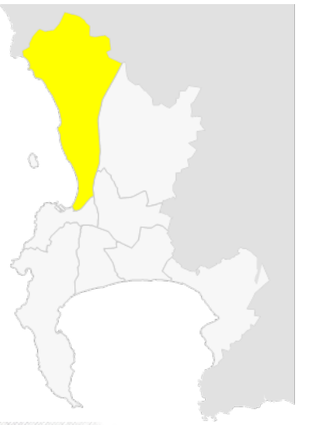
ALIGNMENT TO SPATIAL POLICY

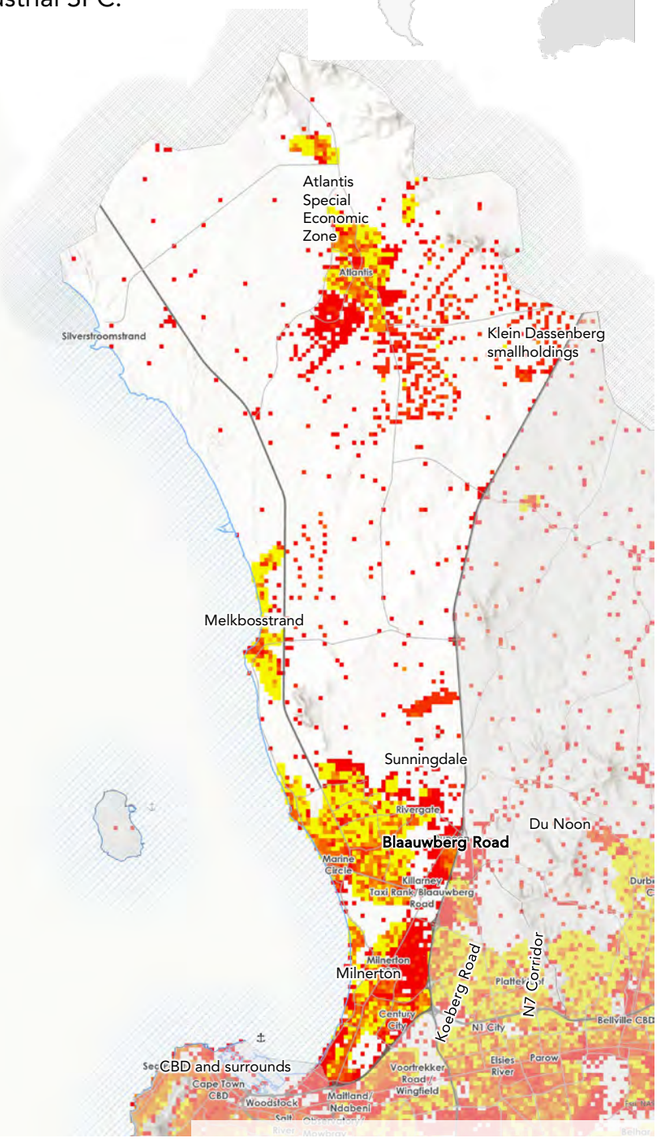
The change in land use between 2012 and 2025 correlates with areas identified for mixed use intensification and take up of larger NDA's in Sandown and Sunningdale. Generally, diversification is happening in nodes and corridors, except industrial, because of the more strict zoning, location of major hazardous 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 and Sandown – along corridors like Berkshire Boulevard and Sandown. 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 with upgrades to shopping centres and residential in-between. Some update of local business and conversion of older residential stock along Blaauwberg Road. 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. as well as increased growth in Montague Gardens. Major development at Potsdam Wastewater treatment works with upgrades of facilities.





Map C5c-b: Blaauwberg: Residential vs Non-Residential land use (2025)

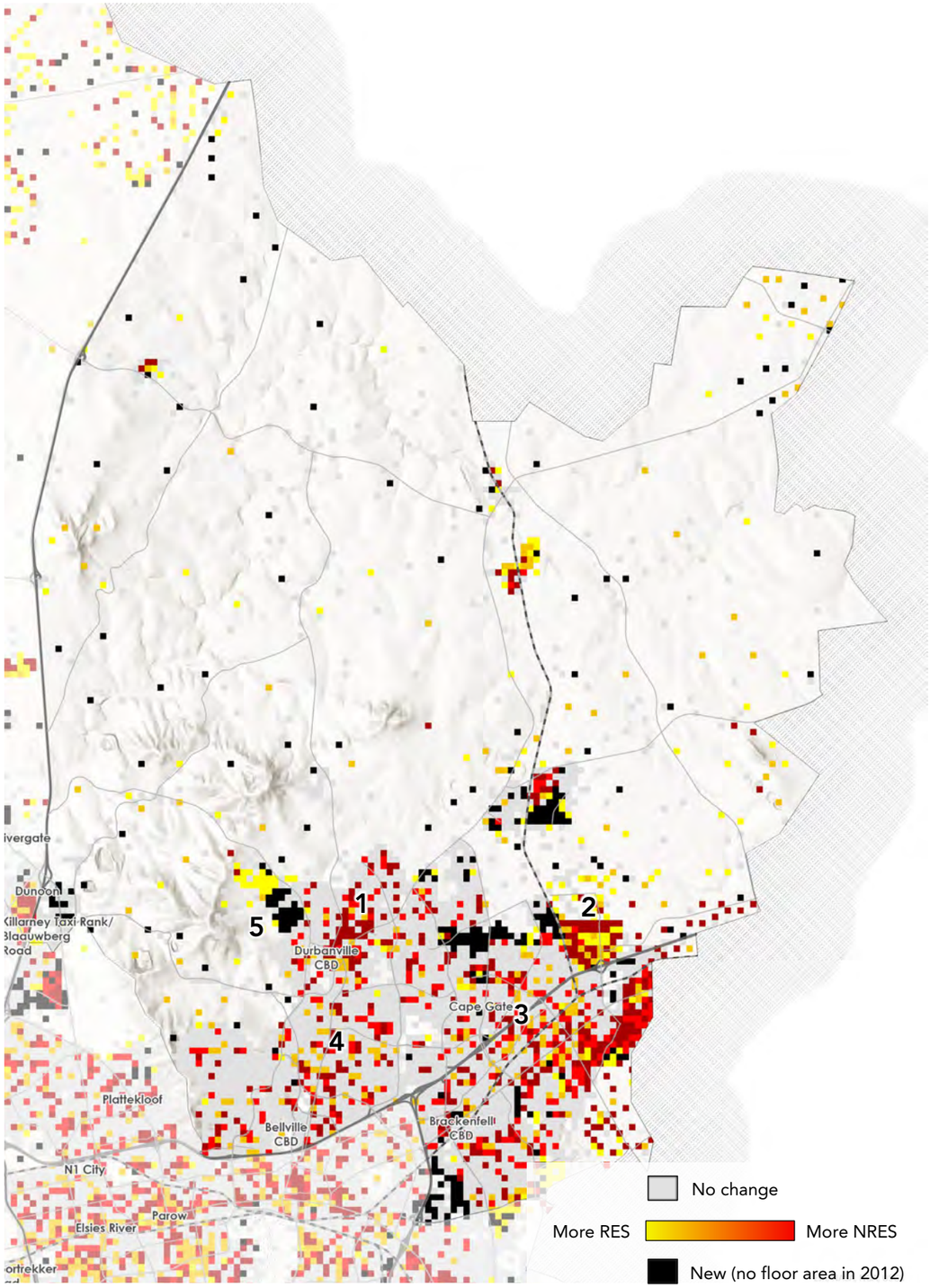
C.5c

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.

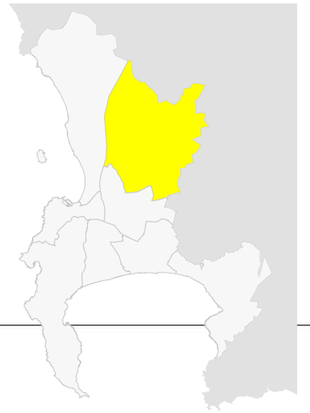
Source: CCT General Valuation Rolls (2012, 2015, 2018, 2022 and 2025)



Map C5c-a: Northern: Change in land use diversity (2012 to 2025)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)



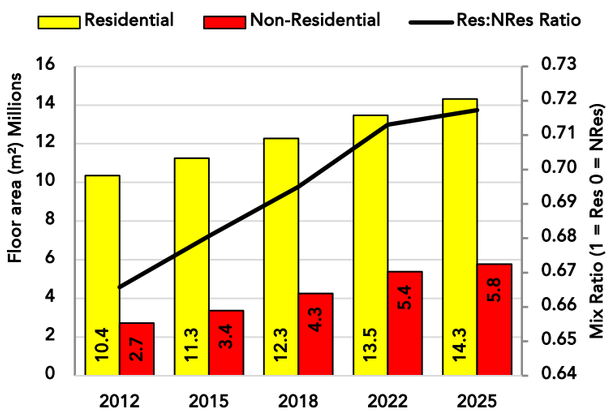
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2025 correlates with areas identified for mixed-use intensification as ascribed to proposals in the 2023 Northern District Plan.

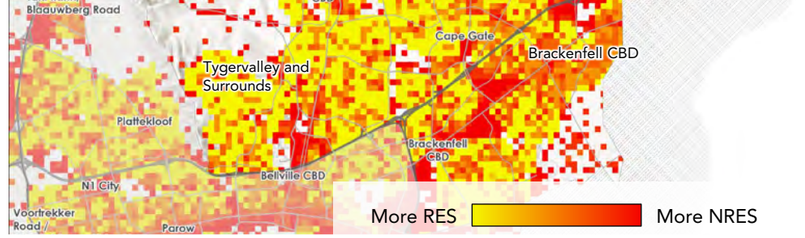
LOCAL LEVEL TRENDS

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

1. Durbanville CBD - Change from single residential to either higher density general residential (group housing/apartments) and/or commercial as prescribed in sub-district development guidelines. Implementation started 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 R1 to commercial.
5. Lower density development in Clara-Anna Fontein. Land use approvals in place – implementation underway.



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



Map C5c-b: Northern: Residential vs Non-Residential land use (2025)

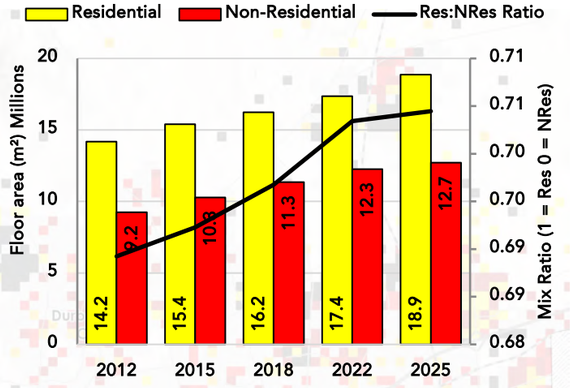
C.5c

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 and 2025)

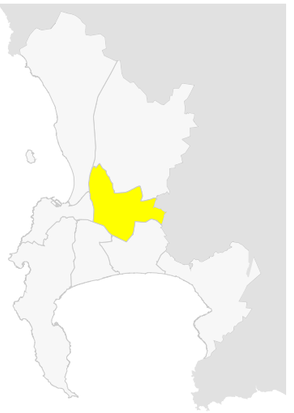


Graph C5c-a: Tygerberg: Change in non-residential to residential ratio.

Map C5c-a: Tygerberg: Change in land use diversity (2012 to 2025)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



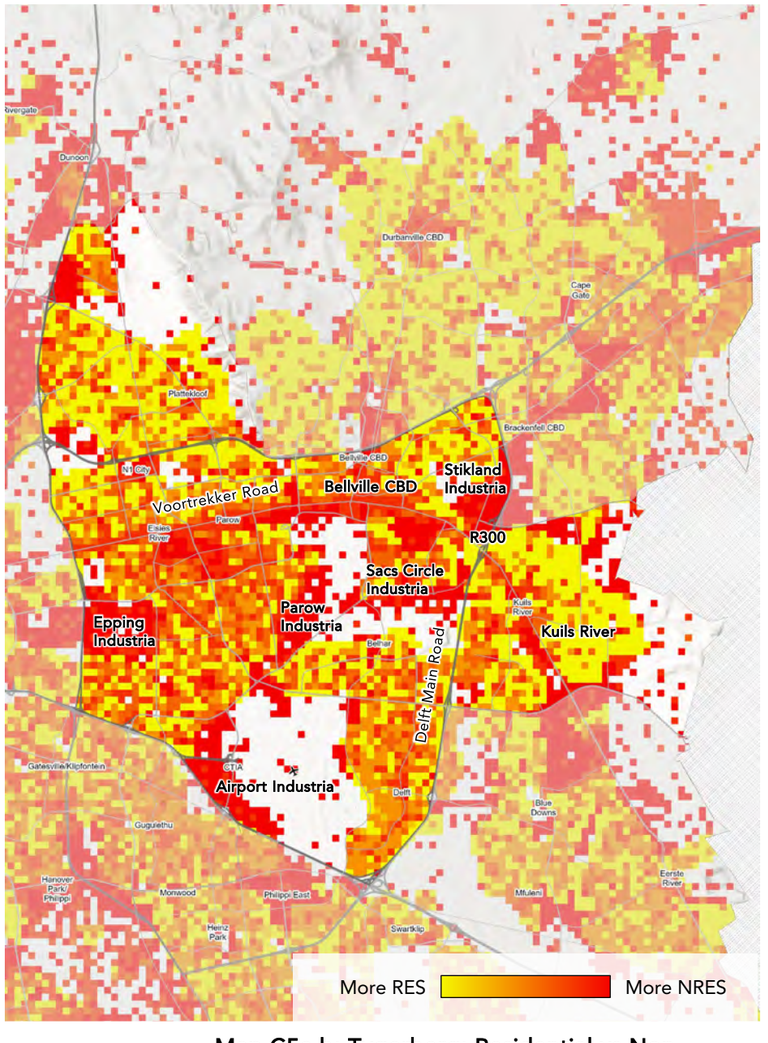
ALIGNMENT TO SPATIAL POLICY

The change in land use between 2012 and 2025 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 (2025)

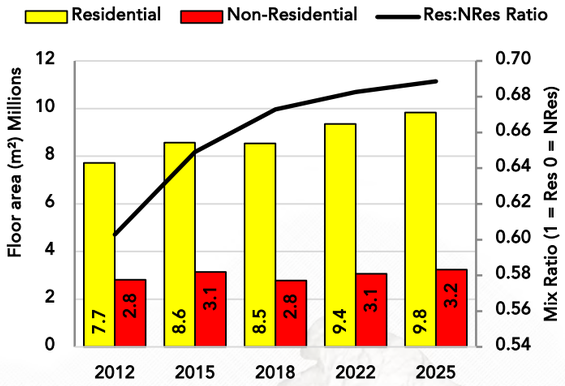
C.5c

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 and 2025)

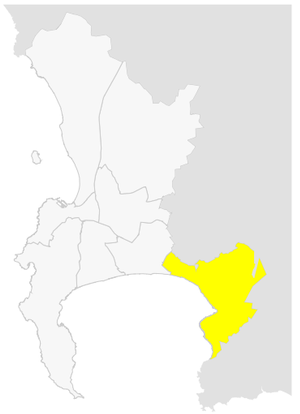


Graph C5c-a: Helderberg: Change in non-residential to residential ratio.

Map C7c-a: Helderberg: Change in land use diversity (2012 to 2025)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)



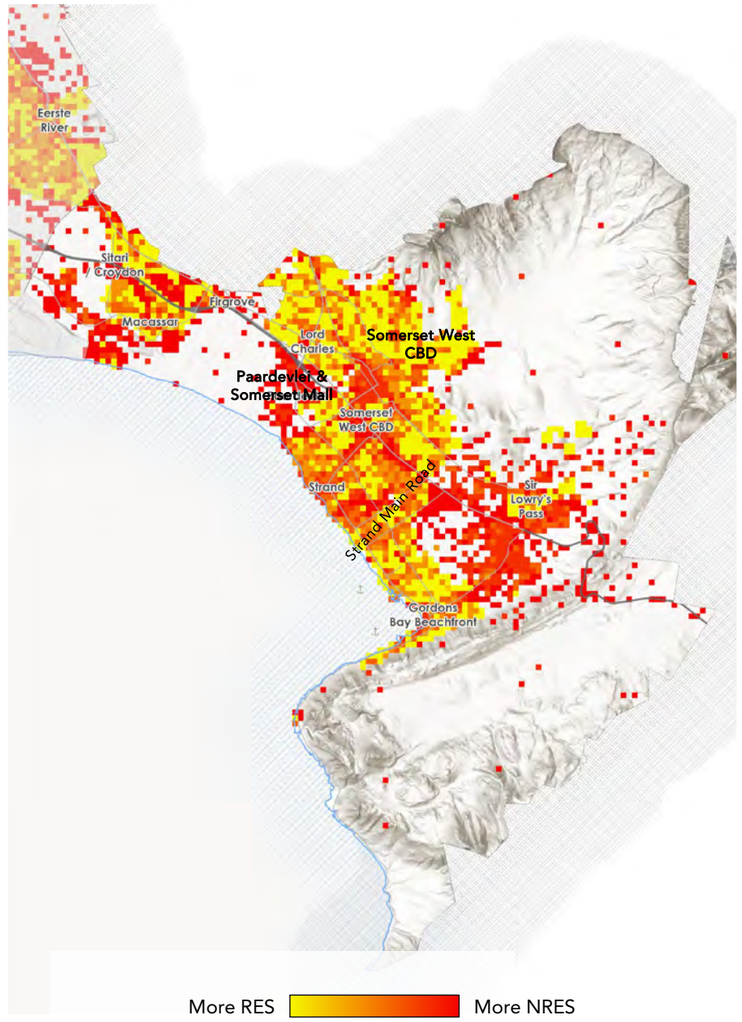
ALIGNMENT TO SPATIAL POLICY

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 occurred 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 an increase in density due to a mix of non-res development.
7. This area has identified increase in residential development complexes which occurred along the N2 towards Old Sir Lowry's Pass Road.



Map C5c-b: Helderberg: Residential vs Non-Residential land use (2025)

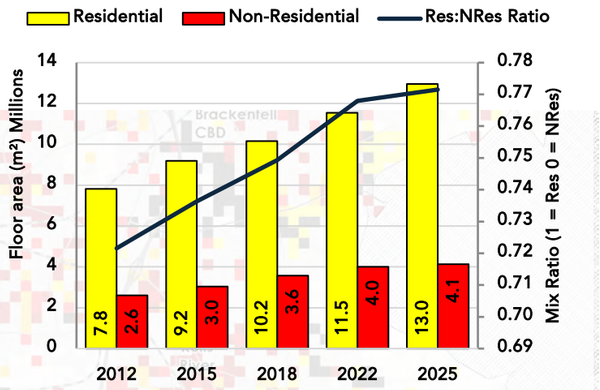
C.5c

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 and 2025)

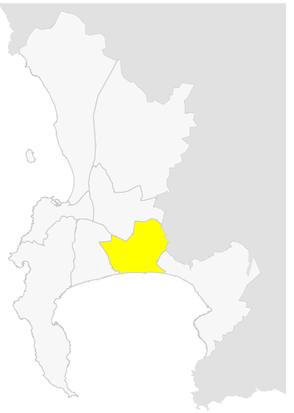


Graph C5c-a: KMPGBD: Change in non-residential to residential ratio.

Map C5c-a: KMPGBD: Change in land use diversity (2012 to 2025)

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)



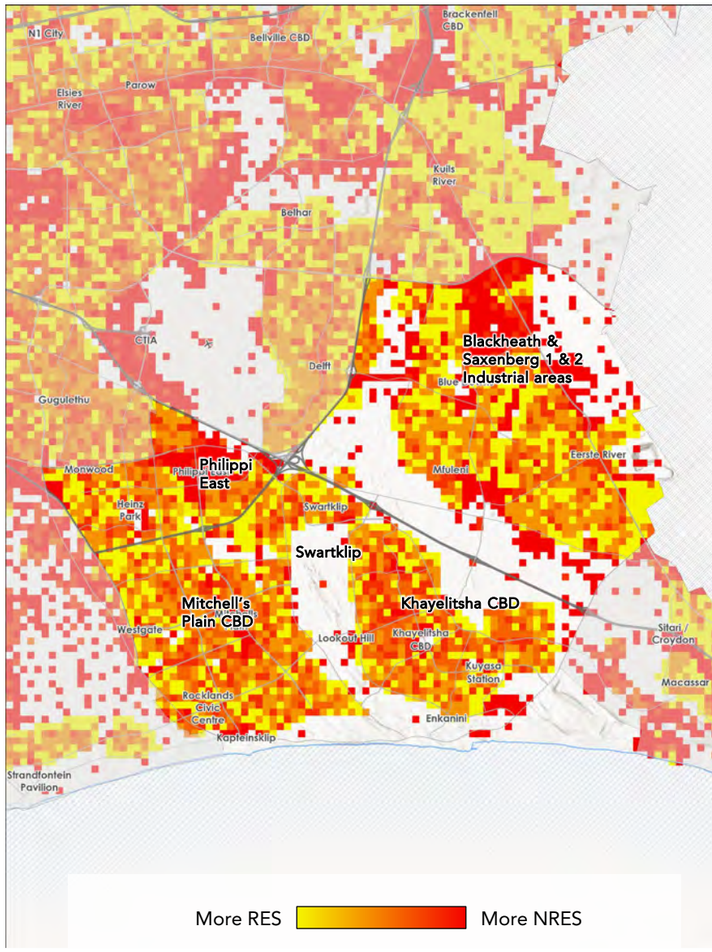
ALIGNMENT TO SPATIAL POLICY

Residential floor space continues to dominate the district, although local shifts towards non-residential uses are evident around some centres and development routes. These changes broadly support the DSDF approach to mixed-use intensification and improved access to local services. However, non-residential growth has not kept pace with residential growth at district level. Strengthening local employment areas and business opportunities remains an important implementation priority.

LOCAL LEVEL TRENDS

The maps show uneven changes in the balance between residential and non-residential floor space. Some established areas have shifted towards non-residential uses, while other areas show residential growth or new recorded development. The district graph shows stronger growth in residential floor space over the full period from 2012 to 2025:

1. **Nonqubela and Site B:** Parts of the area show a shift towards non-residential uses within the established residential fabric. The previous district review identifies local businesses around the public transport interchange as part of this context.
2. **Spine Road and Khaya:** Local shifts towards non-residential uses are evident along the route and in surrounding neighbourhoods. This broadly supports the direction for mixed-use intensification.
3. **Silvertown:** Changes in land-use composition occur within the wider Khayelitsha residential area. The retail activity identified in the previous review provides context for these local changes.
4. **Kuyasa station surrounds:** The area shows changes in the balance of residential and non-residential floor space. These should inform planning for housing and supporting activities around the station.
5. **Kapteinsklip:** Parts of the surrounding residential area show shifts towards non-residential uses. This is relevant to the activity-street role identified in the previous district plan.
6. **Mitchells Plain town centre and surrounds:** Local shifts towards non-residential uses occur around the established centre, reinforcing its role in providing services within the wider residential area.
7. **Mfuleni node and Main Road:** The maps show changes in land-use composition together with new recorded development. These are relevant to the area's role as a local centre serving the surrounding residential community.



Map C5c-b: KMPGBD: Residential vs Non-Residential land use (2025)

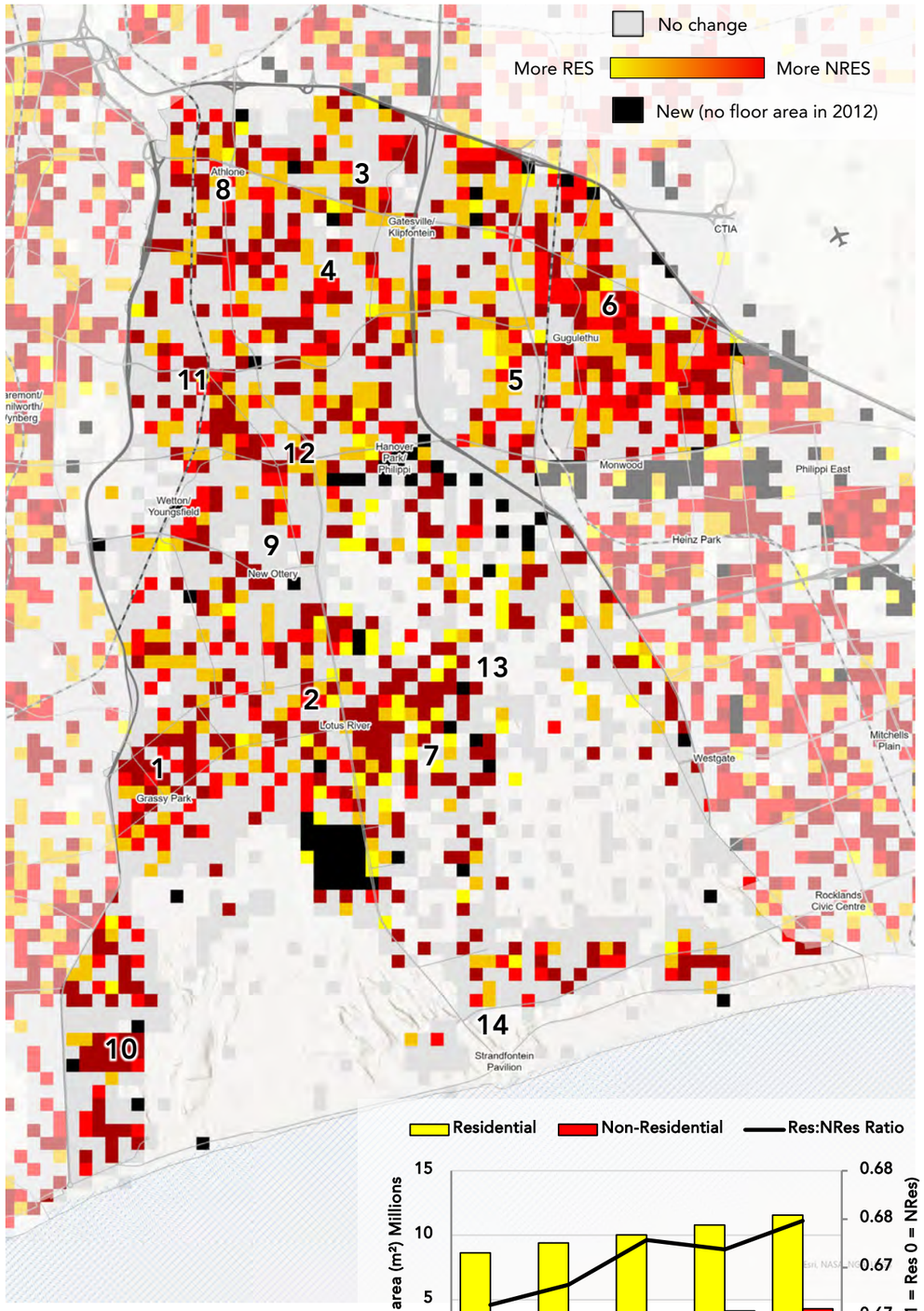
C.5c

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 and 2025)

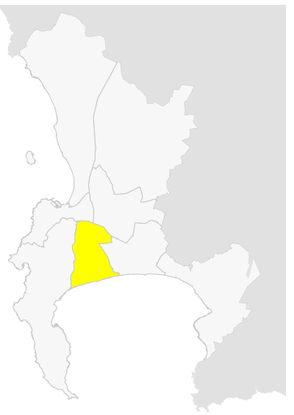


Map C5c-a: Cape Flats: Change in land use diversity (2012 to 2025)

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 2025 generally aligns with areas identified for mixed-use intensification, particularly along the Klipfontein Road corridor, along Victoria Road and in nodal areas such as Athlone, Ottery and Grassy Park. Some diversification, such as along Klip Road, around Lotus River and in Penlyn Estate, has occurred outside these designations.

LOCAL LEVEL TRENDS

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

[1] Grassy Park has seen increased non-residential development within the Victoria Road mixed-use intensification area, with diversity extending beyond it along Klip Road.

[2] Lotus River shows an increased mix of uses, partly beyond the local node and mixed-use intensification area.

[3] The Klipfontein Road corridor shows diversification in both directions, in line with its designation: new residential development in Rylands/Silvertown and a greater mix of uses around Belgravia Road in Athlone.

[4] Penlyn Estate has shifted from a purely residential area to a mix of uses, likely due to its proximity to Athlone and Gatesville, although it is not a designated mixed-use area.

[5] Manenberg and **[6]** Gugulethu show a gradually increasing mix of uses, with Gugulethu's change centred on its local node.

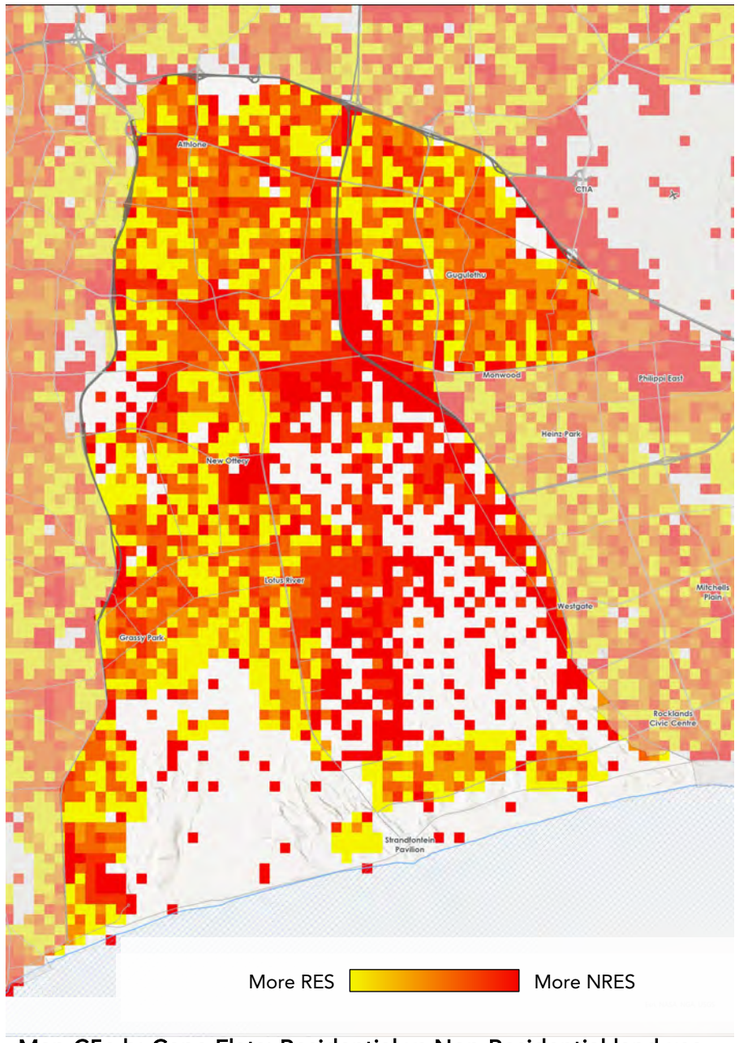
[7] In Schaapkraal, the mix of uses is increasing as smallholdings transition to urban use within the urban development edge.

[8] Athlone saw a significant number of non-residential applications completed in 2018/19, with **[9]** Ottery following a similar pattern, including industrial buildings. Both are district nodes, where office development has been consistent since 2017.

[10] Capricorn Park and **[11]** Lansdowne have attracted industrial development within existing industrial areas, while **[12]** Wetton and the Lansdowne industrial area recorded a high number of non-residential applications prior to 2020.

[13] The PHA core has seen growth in utilities, tourism-related activities, agri-industry storage and farm labourer accommodation within the Areas of Agricultural Significance. These largely support agriculture, but their cumulative effect warrants monitoring.

[14] Strandfontein has seen land use diversification mainly through the introduction of new utility services to support the future growth of the area.



Map C5c-b: Cape Flats: Residential vs Non-Residential land use (2025)

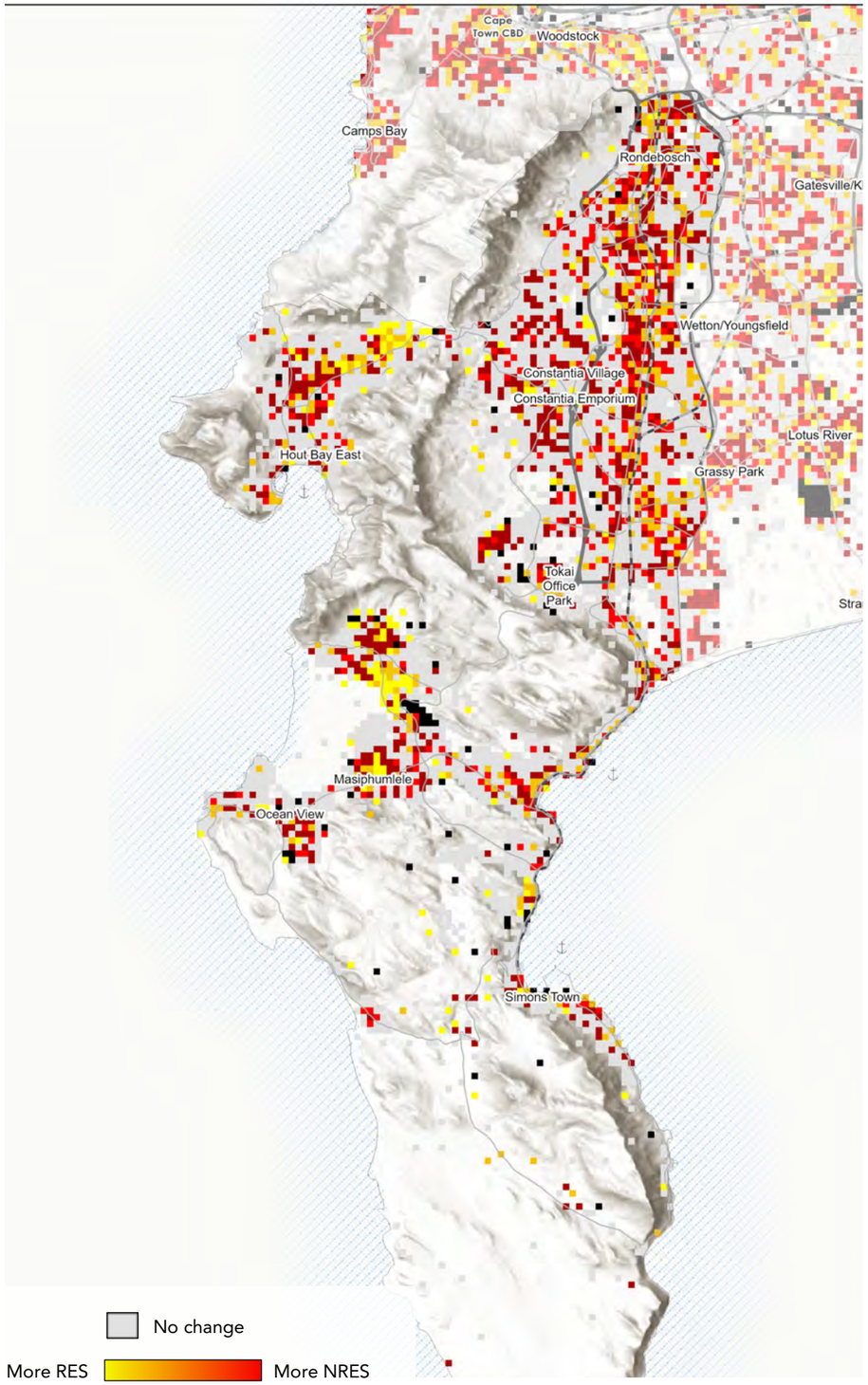
C.5c

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)



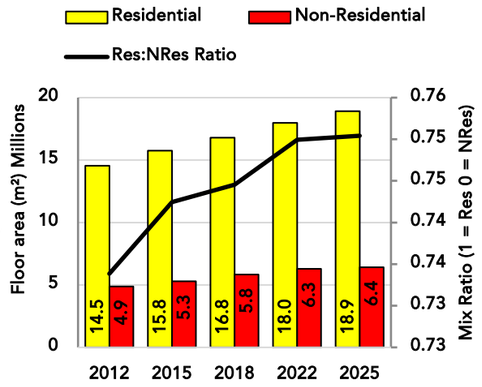
Map C5c-a: Southern: Change in land use diversity (2012 to 2025)

DISTRICT LEVEL ANALYSIS

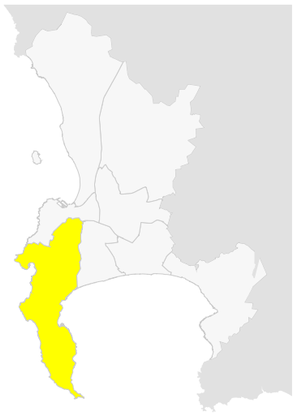
SOUTHERN DISTRICT (H)

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.



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

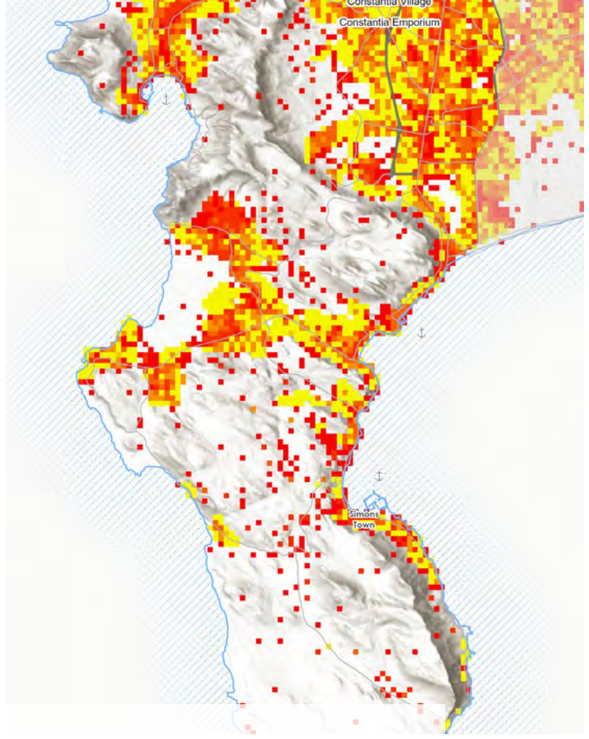


LOCAL LEVEL TRENDS

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.



Map C5c-b Southern: Residential vs Non-Residential land use (2025)

C.5

DIVERSITY OF USE

KEY TAKE-AWAY TRENDS

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 specific concentrations

- **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.

Map C5a-a: Change in land use diversity (2012 to 2025)

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

Map C5a-b: Residential v Non-Residential land use (2025)

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

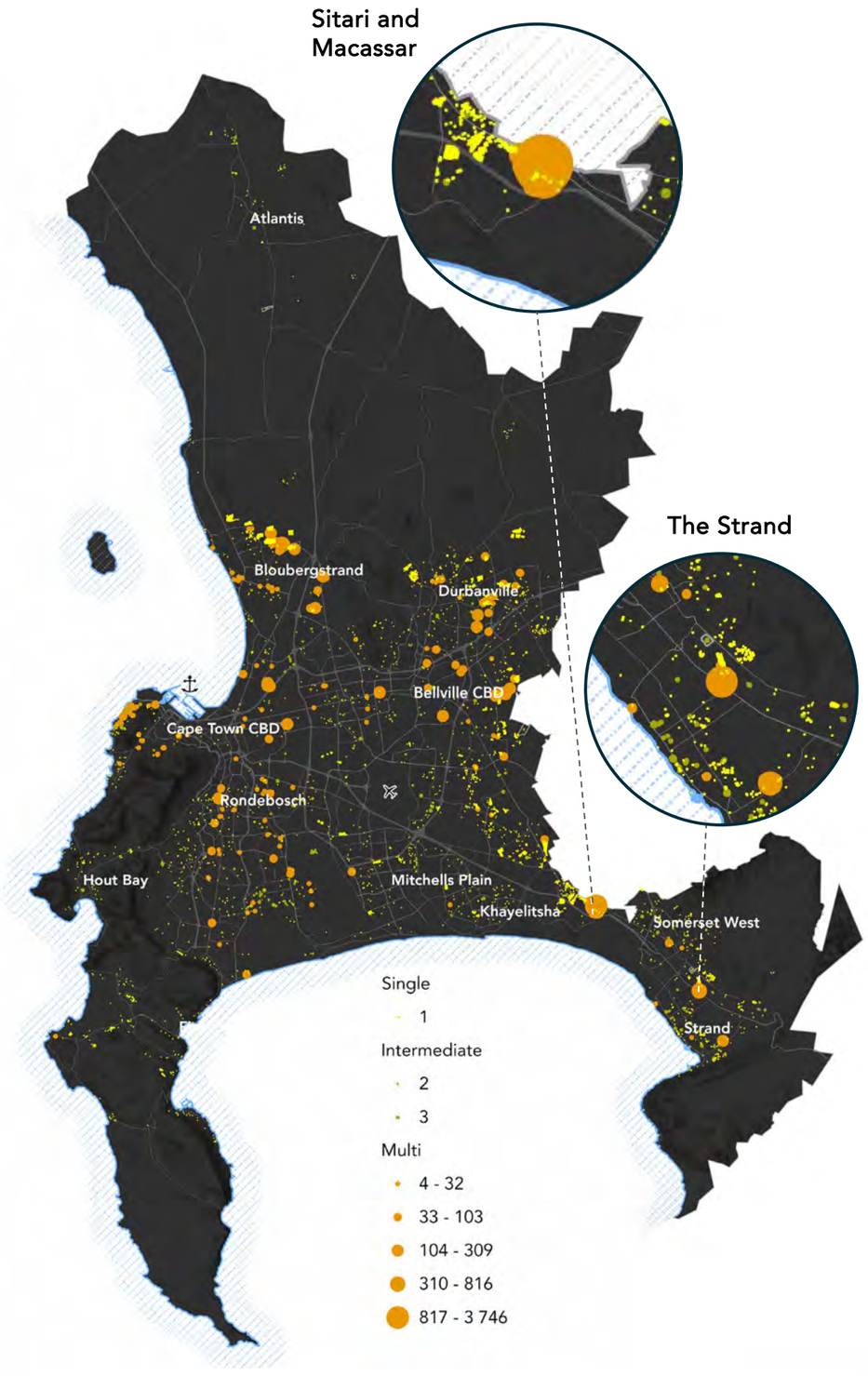


Figure C6-a: Building plans commenced and completed per residential category (single, intermediate and Multi) from January 2020 to April 2025.

OVERVIEW

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:

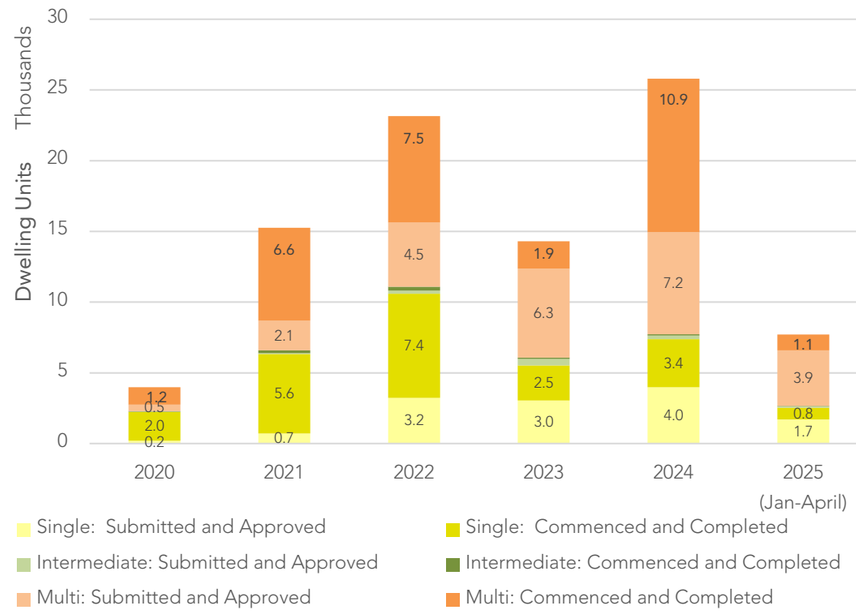
- **Single:** Building plans for one residential unit
- **Intermediate:** Building plans for 2 to 3 residential units
- **Multi:** Building plans for more than 3 residential units

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

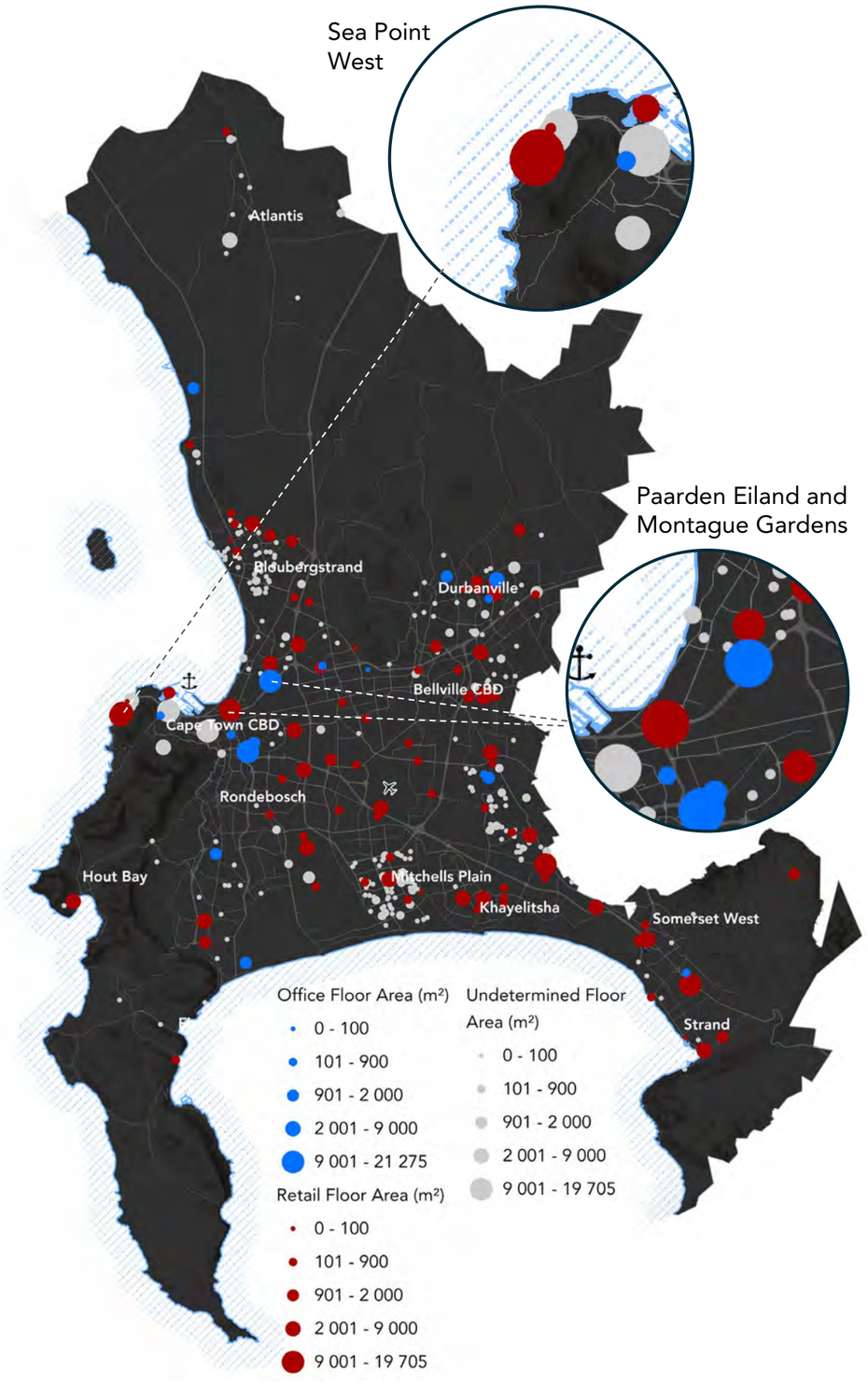


Figure C6-b: Building plans commenced and completed per commercial category (retail and office) from January 2020 to April 2025. Additions and alteration have been excluded

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.

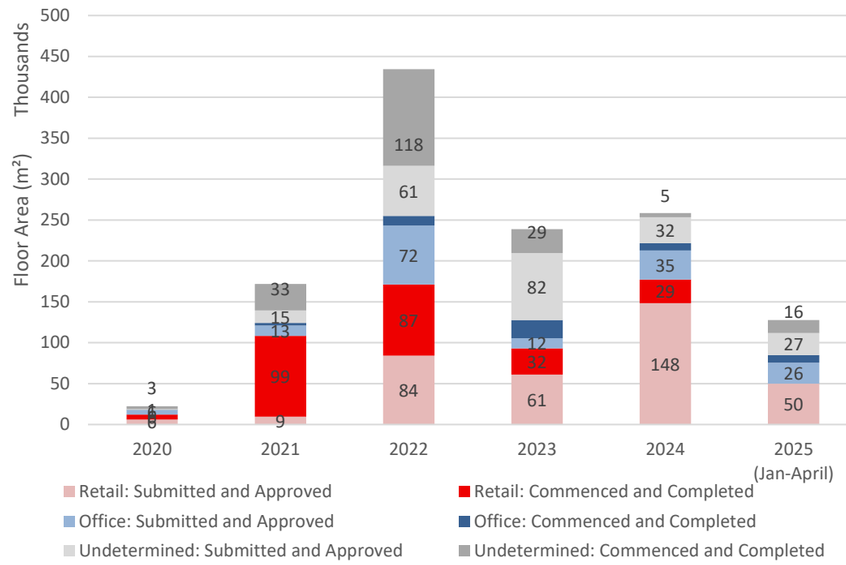
Commercial floor area is classified into the following categories:

- **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

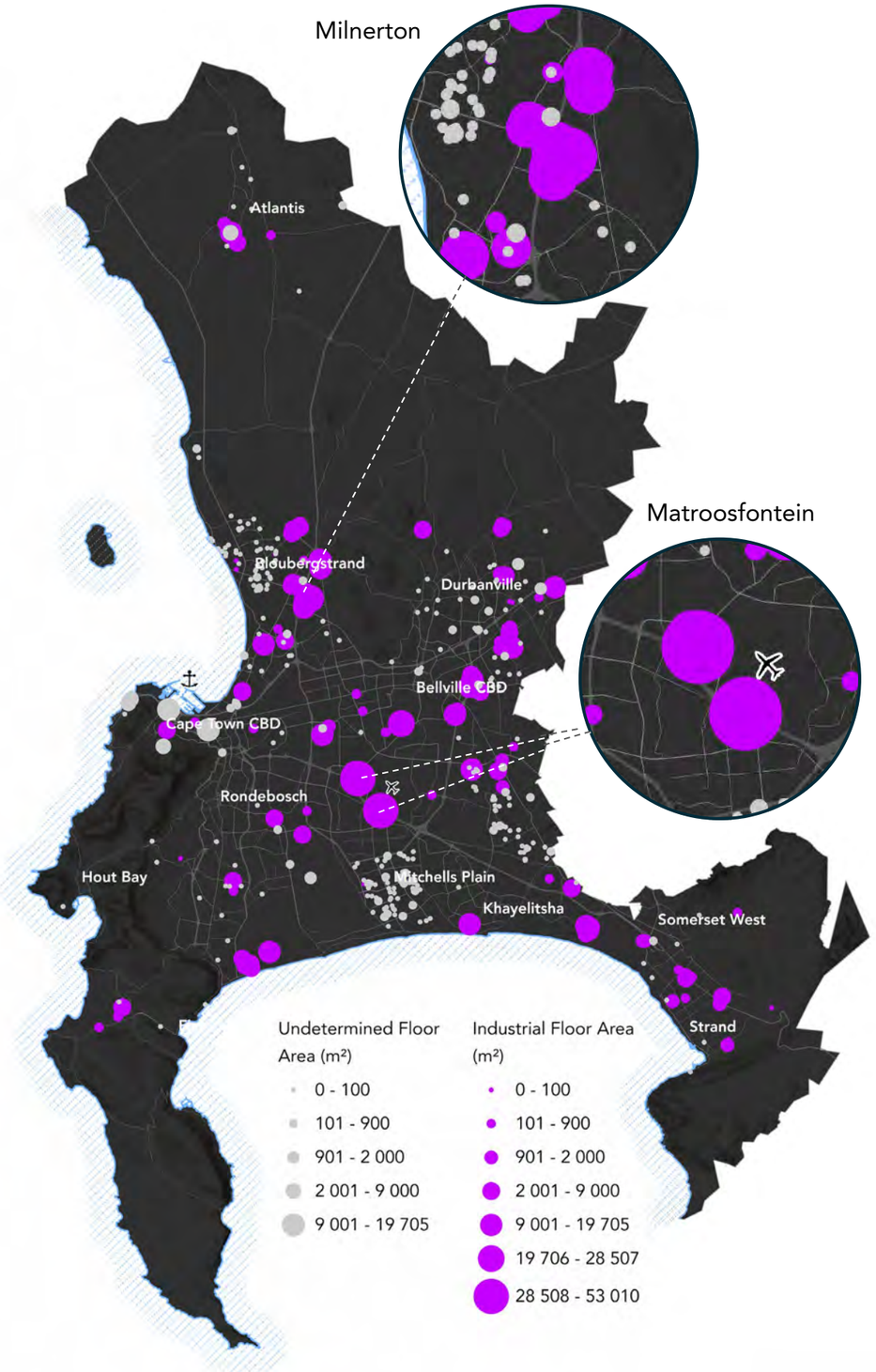


Figure C6-c: Building plans commenced and completed for industrial building plans from 2020 to 2025 (Jan – April). Additions and alteration have been excluded.

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.

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

C.7a

LAND AND BUILDING DEVELOPMENT

PROPERTY MARKET ACTIVITY

2026 New

This indicator examines activity and real price movements in the formal property market (2010/11-2024/25) and includes residential, commercial and industrial properties. All prices are adjusted for inflation.

Source: Deeds Office registrations, City of Cape Town General Valuation rolls from GV2012-GV2025, Statistics South Africa CPI and Residential Property Price Index series, South African Reserve Bank prime lending rate. Data was compiled and analysed by Economic Analysis (October 2026)

OVERVIEW

This section examines activity and real price movements in Cape Town's formal property market only. It covers residential, commercial and industrial properties, distinguishing between freehold and sectional-title ownership. Sales are grouped by the City of Cape Town's July-to-June financial year and analysed at land-parcel, 4 ha grid, district and metropolitan levels.

Price change is measured primarily using a repeat-sales index. Each property is compared with its own earlier sale, reducing distortions caused by changes in the location, size or type of properties sold in different years.

Unless otherwise indicated, the Western Cape CPI is used in this analysis as it more accurately reflects local market conditions. It is higher than the National CPI, and, as such, real price change estimates are lower than if National CPI were to be applied, as all values are deflated by the chosen CPI figure.

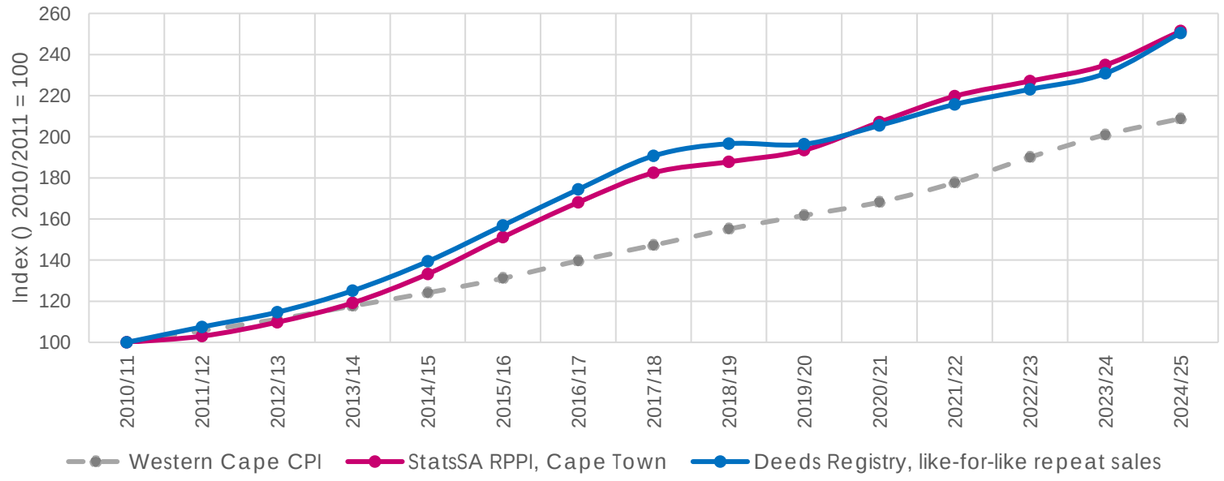


Figure C.7a-1: Residential Prices against Consumer Prices (nominal, 2010/2011 = 100)

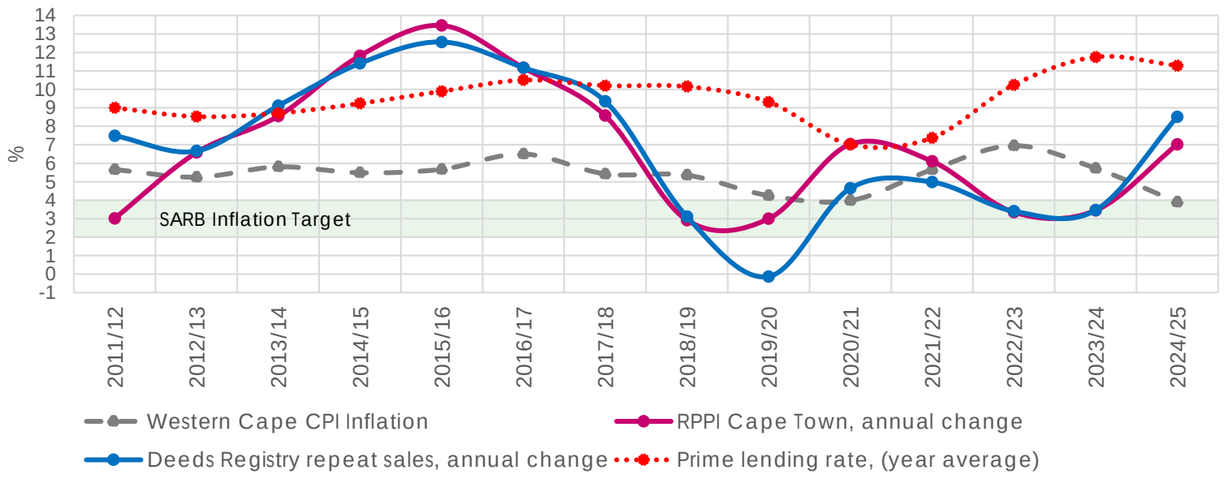


Figure C.7a-2: House-price inflation, Western Cape CPI inflation and the prime interest rate

OVERALL TREND AND GENERAL OBSERVATIONS

Market Conditions

Cape Town's formal property market recorded substantial nominal price growth, but little long-term growth in transaction activity. The number of residential transfers increased from 31,779 in 2010/11 to 32,721 in 2024/25, a rise of approximately 3%. In nominal terms, house prices increased by about 150%, compared with a 109% rise in Western Cape consumer prices. On a like-for-like, inflation-adjusted basis, residential property gained approximately 20% over the period.

Two key determinants move every property price: general inflation and the cost of borrowing. Figure C.7a-1 shows the distinction between nominal house-price growth and general inflation. Figure C.7a-2 provides the corresponding context for annual price movements and borrowing costs. Other factors, such as semigration, population growth, household income trends, housing supply constraints and the rate of new development approvals also influenced property demand and price movements across the city.

Most real growth occurred during the 2013/14–2017/18 period, when annual house-price inflation of 9%–13% exceeded consumer inflation of 5%–6.5%. Since 2018/19, house prices fell behind inflation in four of seven years. Over the same period, the prime lending rate rose from 7.0% in 2020/21 to 11.75% in 2023/24.

Residential and Non-Residential

Residential activity followed a cyclical pattern, reaching 42,949 transfers in 2020/21 before returning to 32,721 in 2024/25. This movement is presented in Figure C.7a-3. Commercial and industrial markets were substantially smaller, recording 508 and 455 transfers respectively in 2024/25 as per Figure C.7a-4.

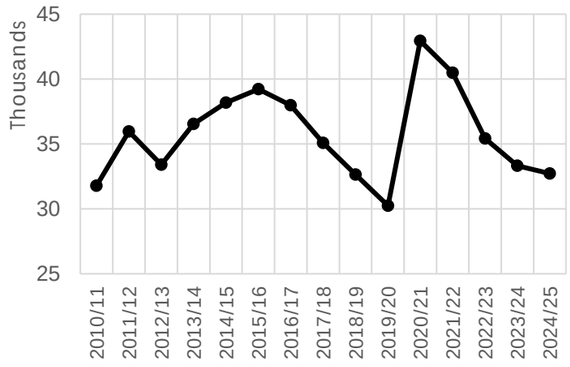


Figure C.7a-3: Residential transfers per year

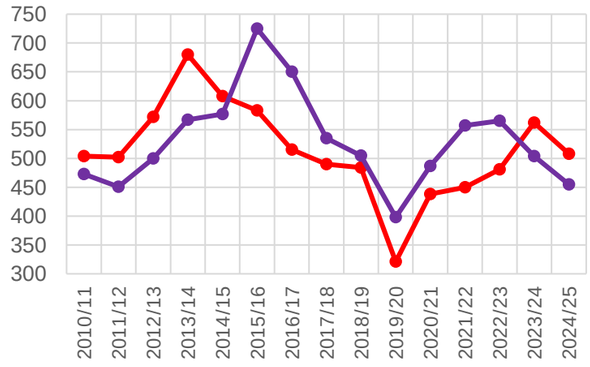


Figure C.7a-4: Non-residential transfers per year

In terms of ownership type, freehold property recorded stronger real price growth than sectional-title property across both residential and non-residential sectors. Based on repeat sales over the full period, freehold residential prices rose by approximately 27%, compared with 15% for sectional-title properties. Commercial freehold property increased by approximately 27%, while sectional-title commercial and industrial units ended broadly flat or lower, although most non-residential estimates are based on relatively few transactions.

C.7a

LAND AND BUILDING DEVELOPMENT

PROPERTY MARKET ACTIVITY: RESIDENTIAL

2026 New

This indicator examines activity and real price movements in the formal property market (2010/11-2024/25) and includes residential, commercial and industrial properties. All prices are adjusted for inflation.

Source: Deeds Office registrations, City of Cape Town General Valuation rolls from GV2012-GV2025, Statistics South Africa CPI and Residential Property Price Index series, South African Reserve Bank prime lending rate. Data was compiled and analysed by Economic Analysis (October 2026)

OVERALL TREND AND GENERAL OBSERVATIONS

Ownership type: figure C.7a-5 shows the differing performance of residential freehold and sectional title properties. Nominal price increases obscure the fact that real price growth has stalled since the 2017/18 peak. Since 2018/19 freehold properties have edged up in real terms (+1.5%) while sectional-title homes have lost 9.9%. This while flats became the dominant form of new housing with its share of completed units rising from 22.5% to 52.8%.

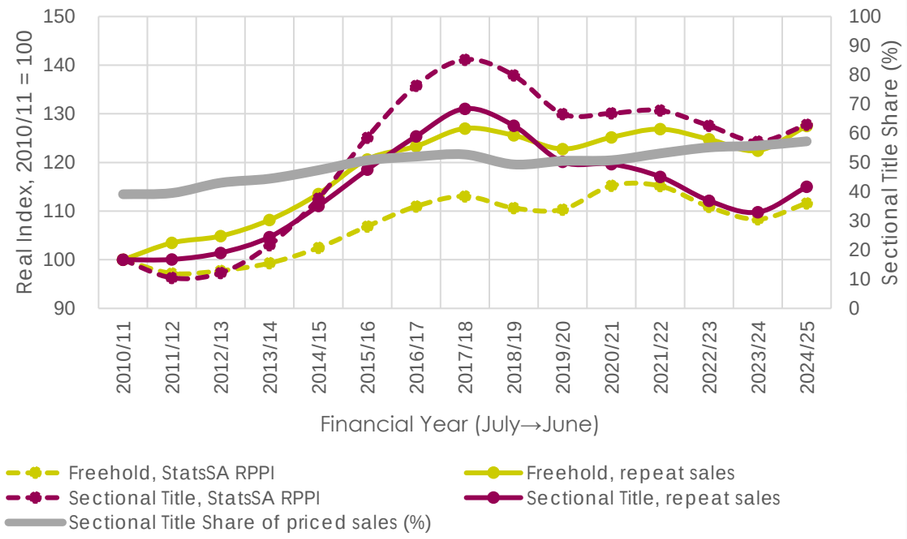
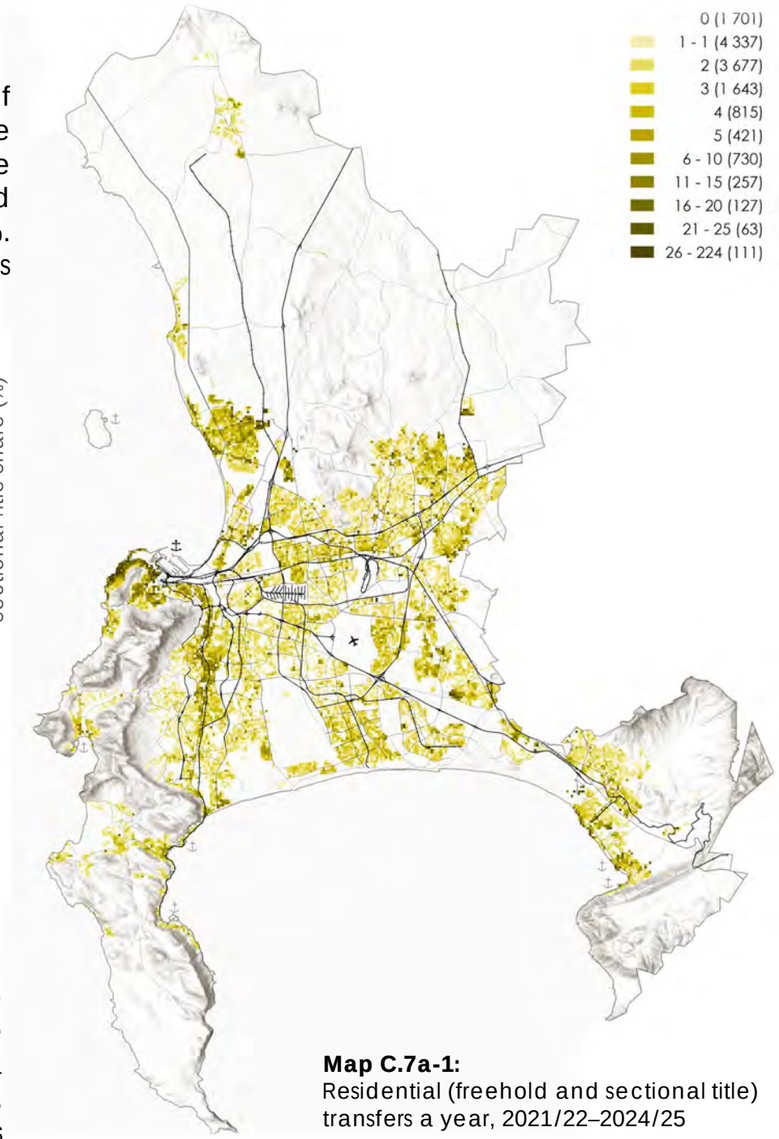


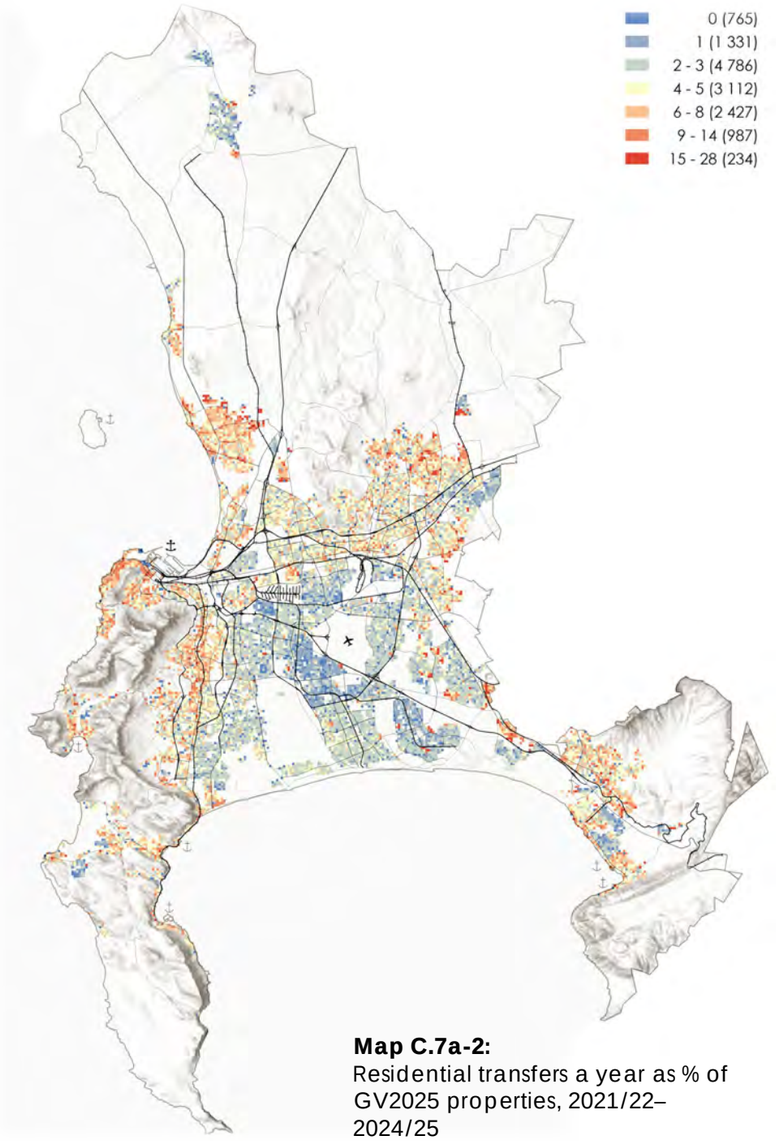
Figure C.7a-5: Freehold compared with sectional title: real price indices

Sales Volume (see Map C.7a-1): residential transfers increased from 31,779 in 2010/11 to a peak of 42,949 in 2020/21, before declining to 32,721 in 2024/25. Over approximately the same period, the formal housing stock grew by 27.3%, resulting in a declining proportion of residential properties being sold annually. Growth in recorded housing stock was concentrated in Mitchells Plain/Khayelitsha, Tygerberg and Northern districts, which together accounted for 57% of additions to the valuation roll. Southern district accounted for 7%. The data reflect both additional housing and broader valuation-roll coverage.

Sales Churn: approximately 4% of Cape Town's formal residential stock changes ownership in a typical year, equivalent to an average holding period of about 25 years. Churn ranges from 6.1% a year in Blaauwberg to 2.2% in Cape Flats. Map C.7a-2 illustrates both transaction concentration and relative churn. Higher turnover is recorded along the Blaauwberg coast, Atlantic Seaboard, Durbanville and Somerset West, while lower turnover occurs in Cape Flats and Mitchells Plain/Khayelitsha.



Map C.7a-1:
Residential (freehold and sectional title) transfers a year, 2021/22–2024/25



Map C.7a-2:
Residential transfers a year as % of GV2025 properties, 2021/22–2024/25

Price Change: The residential repeat-sales index increased by 22.4% in real terms between 2010/11 and 2024/25 using national CPI, compared with 22.9% in Statistics South Africa's City of Cape Town Residential Property Price Index. Most of the increase occurred before 2018/19.

SPATIAL TREND

Like-for-like real house-price change by district shows that every district recorded a real increase over the full period. Since 2018/19, however, Table Bay recorded the largest decline at 15.5%, while Mitchells Plain/Khayelitsha recorded the strongest increase at 8.4%. Sectional-title prices declined in six of eight districts, while freehold prices increased in five. Residential land values in Mitchells Plain/Khayelitsha increased by 143.4% in real terms between 2012 and 2025, compared with 56.0% citywide

PROPERTY MARKET ACTIVITY

KEY TAKE-AWAYS: RESIDENTIAL

- The number of residential **transfers increased by only 3%**, from 31,779 in 2010/11 to 32,721 in 2024/25, **despite 27.3% growth in the formal housing stock**.

- Like-for-like **residential prices increased by ±20% in real terms**, with **most growth occurring during 2013/14–2017/18**.
- **In real terms, freehold properties gained ±27% over the full period**, compared with **±15% for sectional-title properties**.
- **Since 2018/19**, **freehold prices increased by 1.5%**, while **sectional-title prices declined by 9.9% in real terms**.
- Since 2018/19, **real prices fell most in Table Bay** and **rose most in Mitchells Plain/Khayelitsha**.

- **Annual churn averages about 4%**, **ranging from 6.1%** in Blaauwberg **to 2.2%** in Cape Flats

- Between 2018 and 2025 **easing real prices and dearer credit roughly cancelled out**, which did not assist in making homes more affordable.

C.7a

LAND AND BUILDING DEVELOPMENT

PROPERTY MARKET ACTIVITY: NON-RESIDENTIAL

2026 New

This indicator examines activity and real price movements in the formal property market (2010/11-2024/25) and includes residential, commercial and industrial properties. All prices are adjusted for inflation.

Source: Deeds Office registrations, City of Cape Town General Valuation rolls from GV2012-GV2025, Statistics South Africa CPI and Residential Property Price Index series, South African Reserve Bank prime lending rate. Data was compiled and analysed by Economic Analysis (October 2026)

OVERALL TREND AND GENERAL OBSERVATIONS

Ownership type: freehold commercial and industrial properties ended the period above their 2010/11 real price levels after peaking in 2017/18. Commercial freehold property recorded an estimated real increase of approximately 27%. Sectional-title office suites and smaller industrial units ended broadly around, or below, their starting levels.

Sales volume: commercial and industrial transaction volumes were considerably lower than residential volumes. In 2024/25, 508 commercial and 455 industrial transfers were recorded. The relatively small number of transactions, particularly when divided by ownership type, location and year, limits the certainty of detailed price comparisons.

Sales churn: the available analysis maps commercial and industrial transaction intensity rather than reporting a citywide annual churn rate comparable with the residential sector. Maps C.7a-3 and C7a-4 show that sales are concentrated in established commercial and industrial nodes.

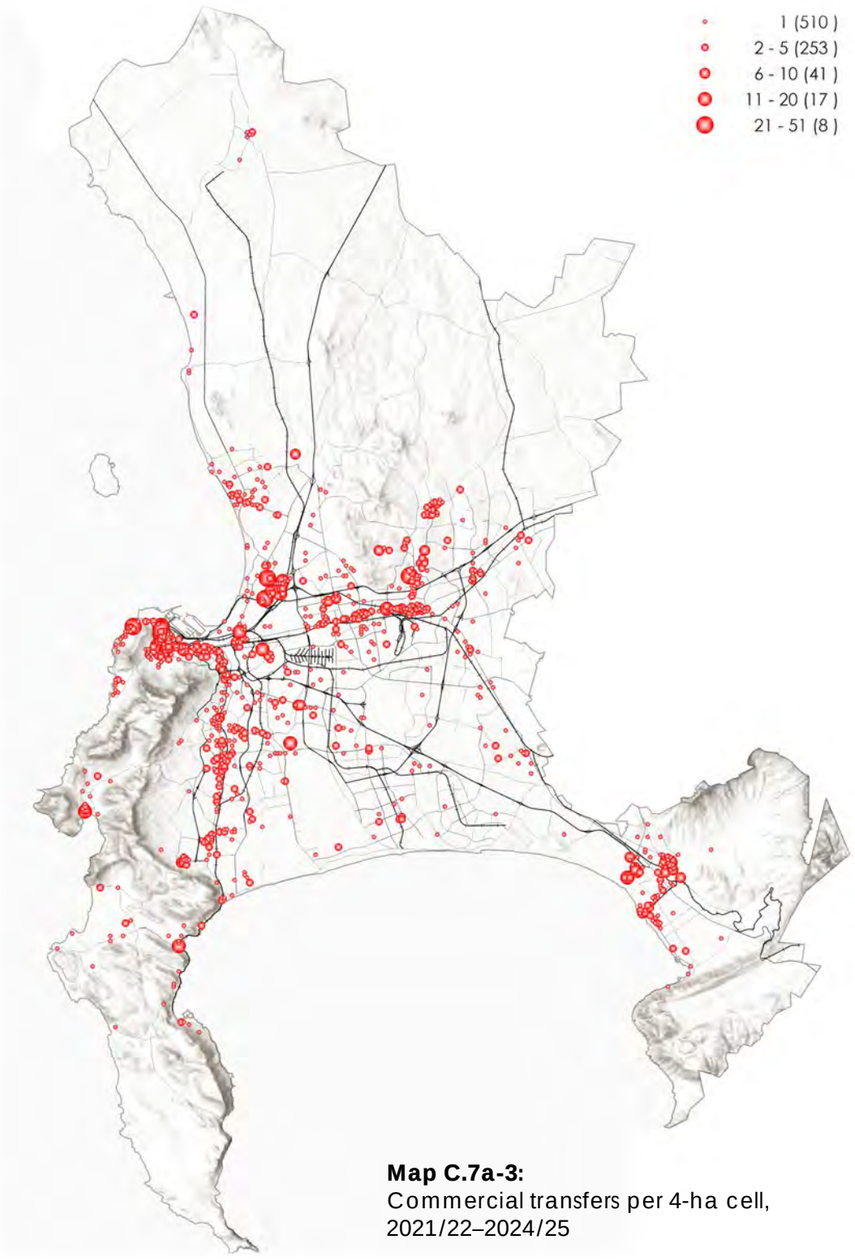
Price change: freehold properties peaked in 2017/18 and remained above their 2010/11 levels, while sectional-title units ended approximately where they began.

SPATIAL TRENDS

Spatial patterns of transactions are shown on Maps C.7a-3 and C.7a-4.

Between 2021/22 and 2024/25, commercial transactions were concentrated in Cape Town CBD, Century City, Somerset West and Bellville.

Industrial transactions were concentrated in Strand, Killarney Gardens, Montague Gardens and Brackenfell.



Map C.7a-3:
Commercial transfers per 4-ha cell, 2021/22–2024/25

Map C.7a-4:
Industrial transfers per 4-ha cell, 2021/22–2024/25

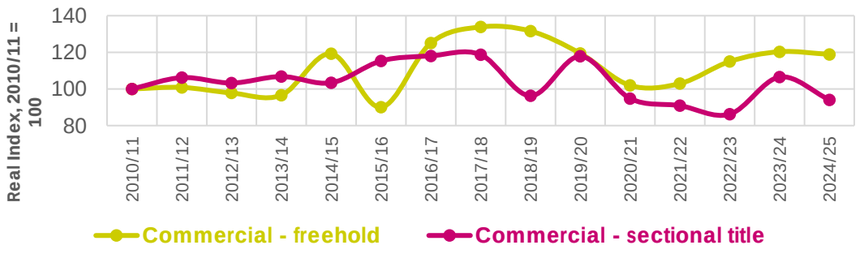


Figure C.7a-7: Commercial: real price per m², adjusted for suburb and size

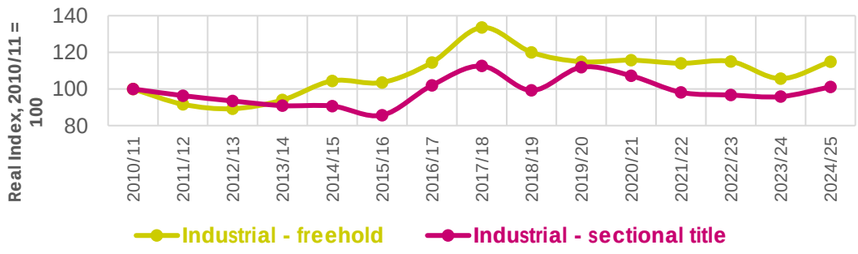


Figure C.7a-8: Industrial: real price per m², adjusted for suburb and size

KEY TAKE-AWAYS: NON-RESIDENTIAL

- **Commercial and industrial markets are relatively small**, recording 508 and 455 transfers respectively in 2024/25. Confidence ranges are wider because transaction volumes are low and alterations cannot be screened from repeat-sale pairs.

- **Commercial freehold property recorded an estimated 27% real increase** over the study period.

- **Sectional-title office and industrial units ended broadly flat or lower in real terms**, based on limited repeat-sales samples.

- **Commercial sales** were **concentrated in Cape Town CBD, Century City, Somerset West and Bellville**.

- **Industrial sales centred on Strand, Killarney Gardens, Montague Gardens and Brackenfell**.

C.7

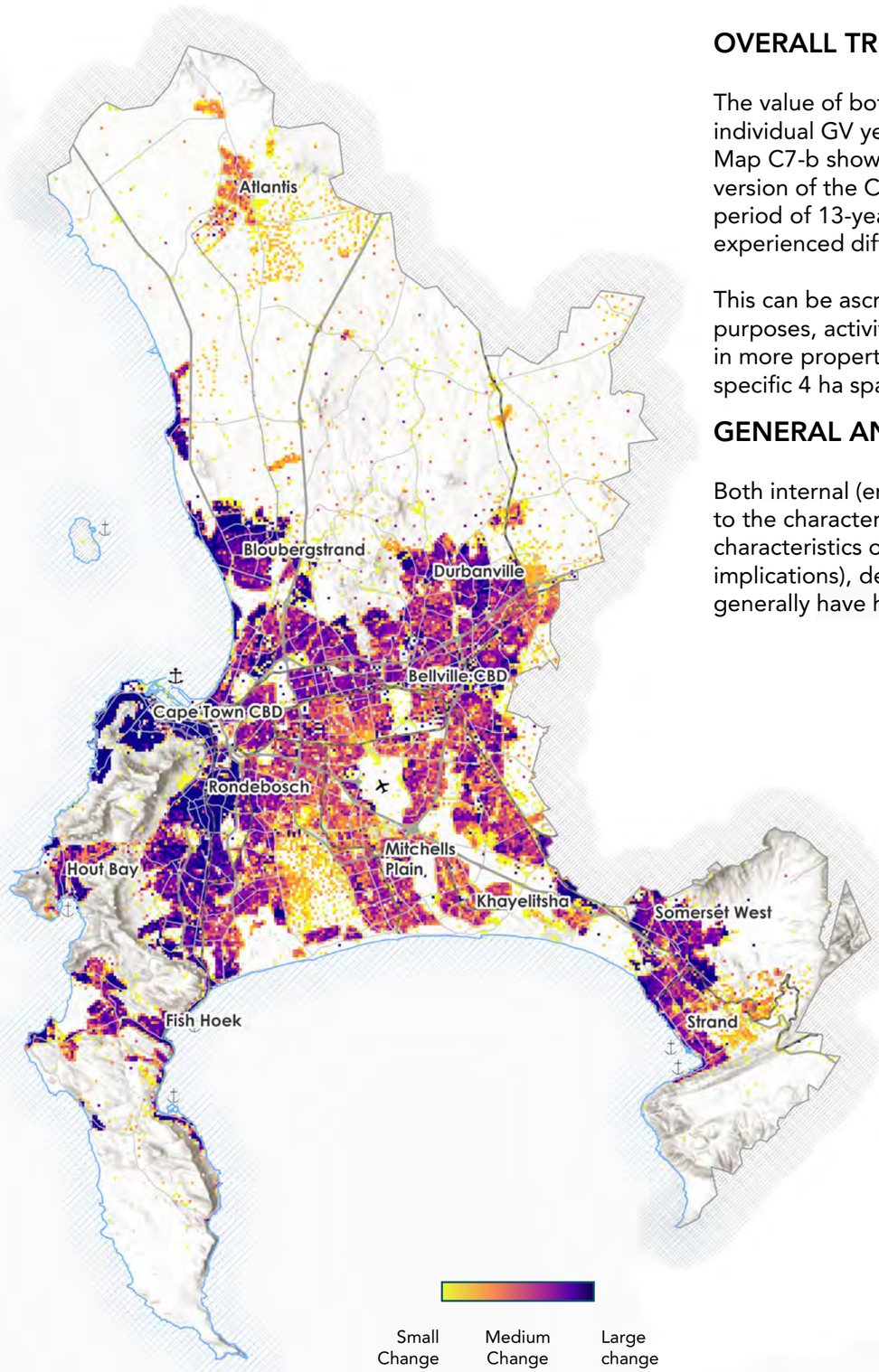
LAND AND BUILDING DEVELOPMENT

CHANGE IN PROPERTY VALUE

2026 Update

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 4 ha (200 m x 200 m) grid cells.

Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)

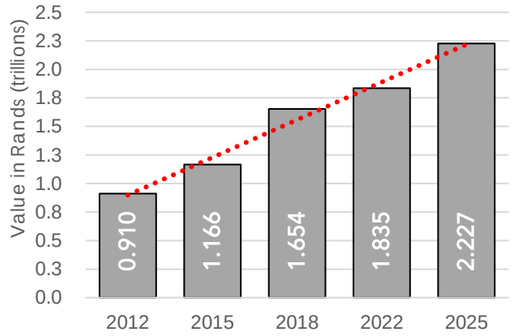


Map C7-a: Change in property value (2012 to 2025)

OVERALL TREND

The value of both residential and non-residential properties has increased between individual GV years, as well as over the analysed period from 2012 to 2025 (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 the change in value over a period of 13-years from 2012 to 2025 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 and land uses, as well as new development in certain areas. This results in more properties and floor space and, consequently, higher property values within those specific 4 ha spatial units of analysis, as shown on map C7-a.



Graph C7-a: Estimated total value (R) of all properties on the City's general valuation roll (may differ slightly from the Valuations Department's official values as at the date of valuation)

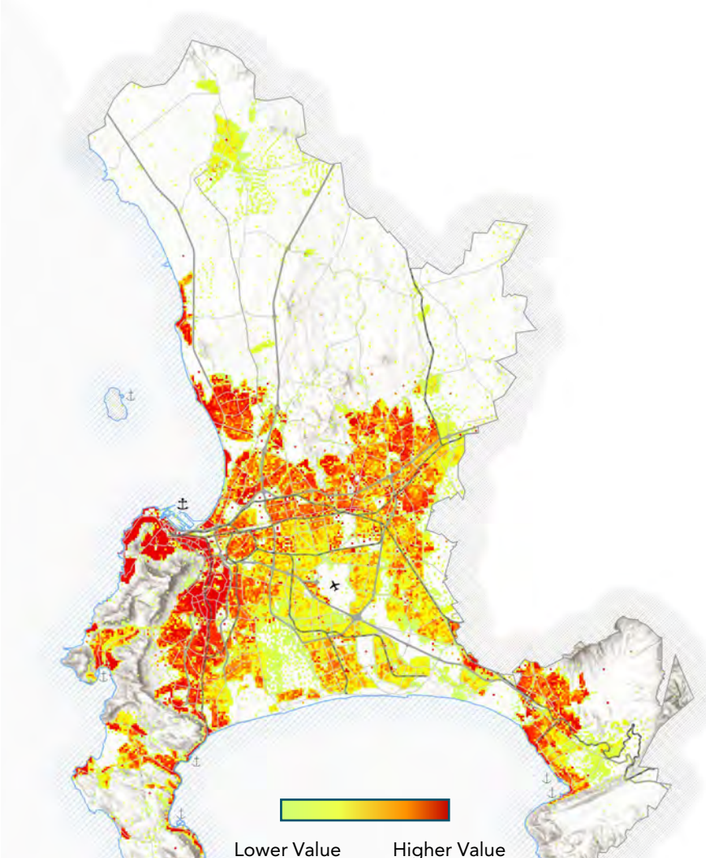
GENERAL ANALYSIS

Both internal (endogenous) and external (exogenous) hedonic pricing factors play a role in determining property values. Internal factors relate to the characteristics of the property itself, including the land and buildings, e.g. size, appearance and finishes. External factors relate to the characteristics of the surrounding environment, e.g. crime rates, proximity to facilities and other locations (with both positive and negative implications), desirable locations (e.g. the coast and the mountain), and the value of other properties in the area. New development areas will generally have higher property values than before development occurred.

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

SPATIAL TREND (DISTRIBUTION/PATTERN)

Between 2012 and 2025, the strongest growth in property values occurred along Cape Town's coastal and high-amenity areas, particularly the Atlantic Seaboard, City Bowl, Southern Peninsula, Bloubergstrand, Somerset West and Durbanville. In contrast, the weakest growth was observed in Philippi and parts of the Cape Flats, including Mitchells Plain, while Khayelitsha recorded moderate to low levels of property value appreciation. The spatial pattern suggests that accessibility, coastal location, environmental amenities and market demand continue to be key drivers of property value growth across the metropolitan area.



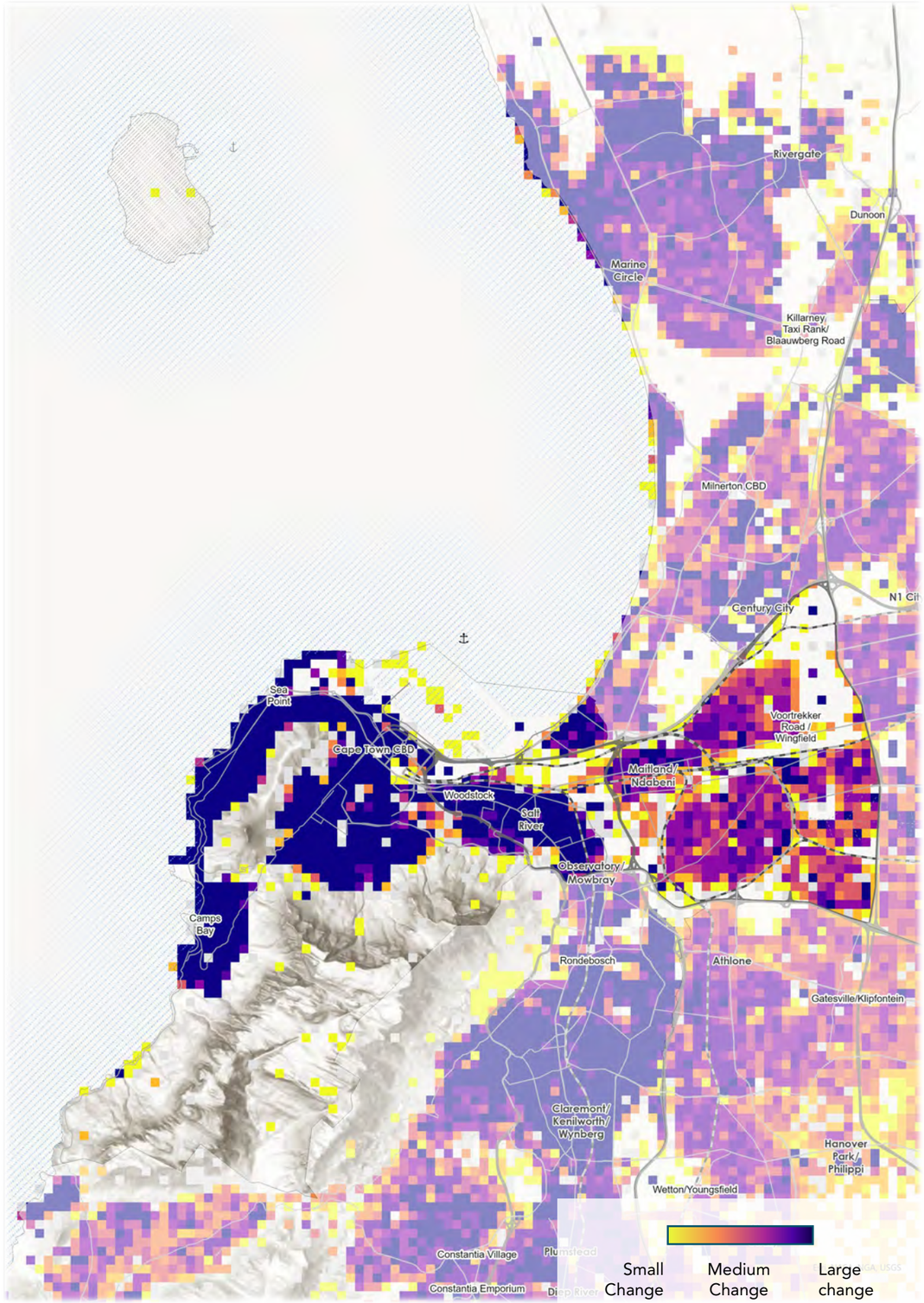
Map C7-b: Property value, 2025

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

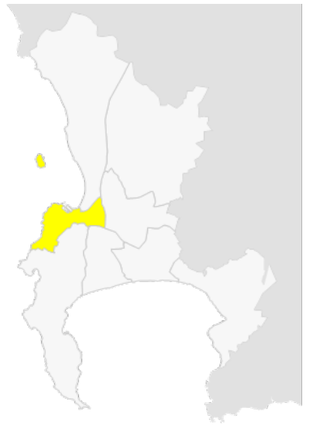
Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)



Map C7-a Table Bay: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)



LOCAL LEVEL TRENDS & ALIGNMENT TO SPATIAL POLICY

Property values have increased across the district, with the most significant increases evident in and around the CBD, extending into Woodstock and Salt River. The pattern of property-value change broadly aligns with areas designated as mixed-use intensification areas, DFAs and NDAs.

Redevelopment and property improvements in Woodstock and Salt River have contributed to some of the observed increase in property values.

Spatially targeted mechanisms and tax incentives, including National Treasury's Urban Development Zone (UDZ), have also supported commercial and residential development in the inner city (see indicator G1a).

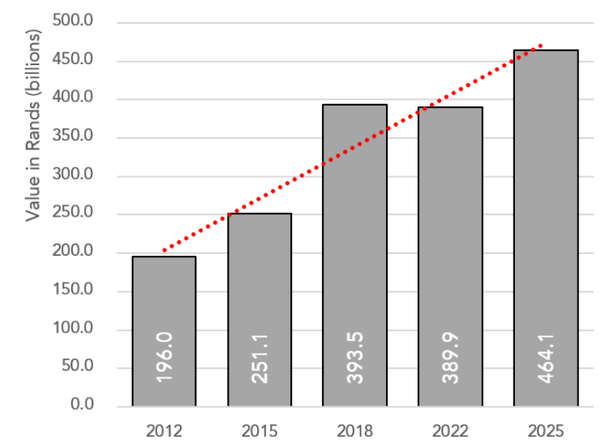
Increases in property values cannot be attributed solely to policy or changes in density. The locational qualities of the CBD and Atlantic Seaboard, including access to employment, sea and mountain views, heritage landscapes, and destinations such as the Promenade, Table Mountain and the V&A Waterfront, may also contribute to higher property values.

Higher-density development tends to occur in areas where higher property prices can be achieved.

Airbnb listings broadly follow the spatial patterns of hotels and formal hospitality development, increasing the supply of visitor accommodation. Hotel-room capacity has also increased in the CBD and Waterfront, with further development planned.

The district remains attractive for development and has generally experienced increasing property values, excluding properties within national park boundaries.

Property values are lower or have declined in some locations on the edges of established neighbourhoods or closer to industrial areas.



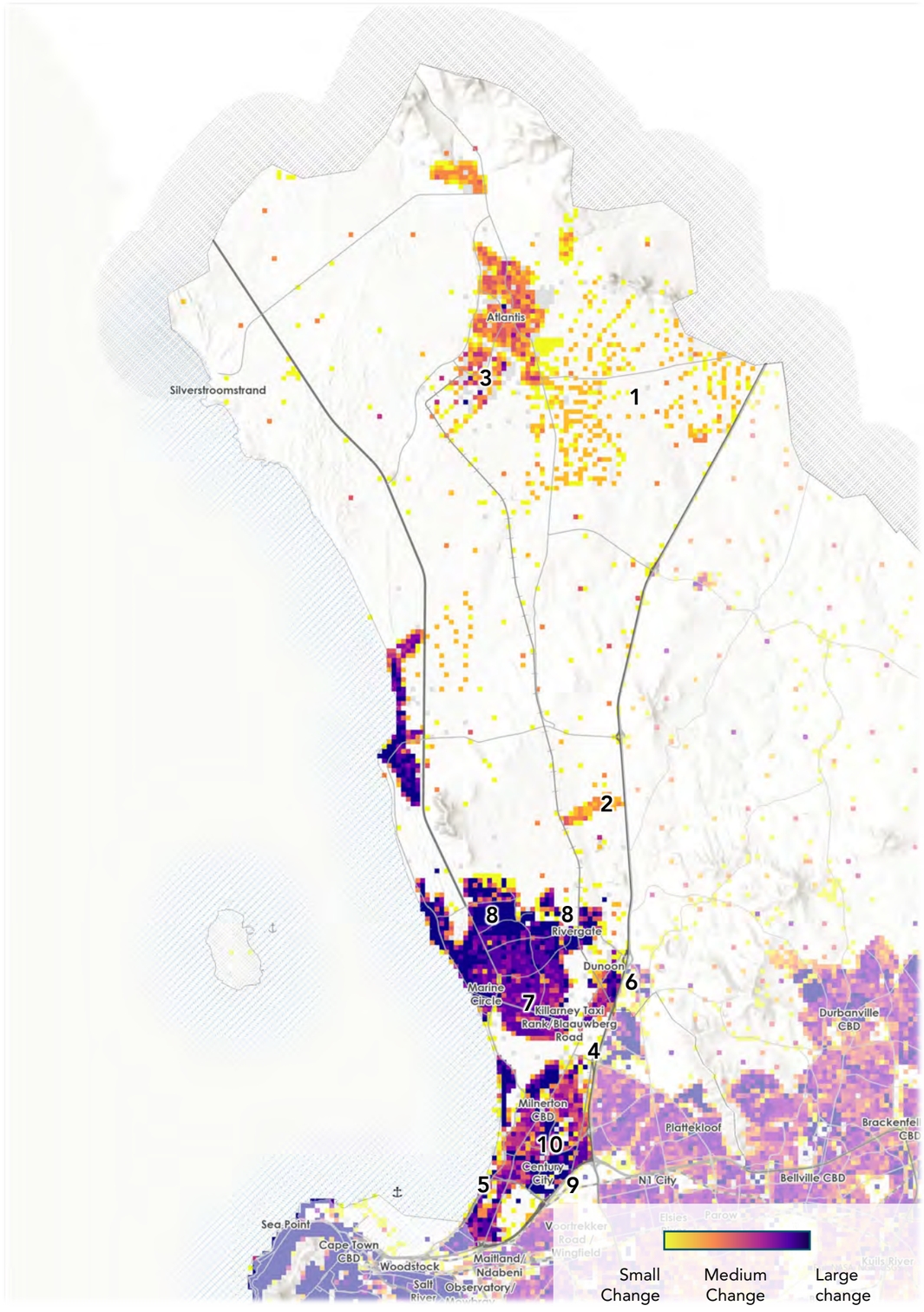
Graph C7-a Table Bay: Estimated total value (R) of all properties on the City's general valuation roll (may differ slightly from the Valuations Department's official values as at the date of valuation)

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

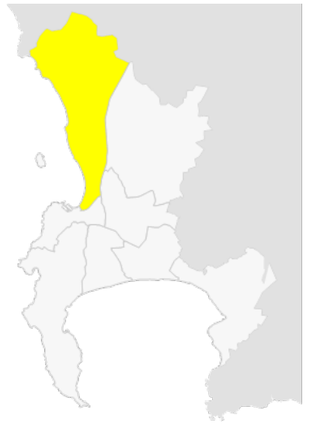
Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)



Map C7-a Blaauwberg: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

BLAAUWBERG DISTRICT (B)



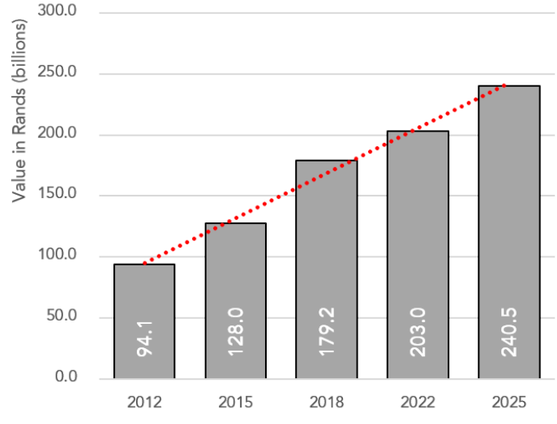
LOCAL LEVEL TRENDS

1. The smallholding areas of Klein Dassenberg and Morningstar have experienced small increases in property values.
2. In Morningstar, increased interest in mixed-use facilities and small-scale intensification has coincided with changes in property values, although these remain minimal.
3. The Atlantis industrial area has experienced small to medium increases in industrial property values. This may be associated with the declaration of the Atlantis Special Economic Zone and related interventions that have increased the attractiveness of the area.
4. The Montague Gardens and Killarney Gardens industrial areas and corridor have experienced medium-level changes in property values over the past decade, alongside ongoing development.
5. Increased property values are evident in the Paarden Eiland industrial area.
6. Property values in Dunoon have grown similarly to those in Flamingo Vlei, representing some of the strongest growth in the district.
7. Property-value increases directly along Blaauwberg Road have generally been lower than in the surrounding suburbs, except around the shopping centres at Bayside, Table View Mall, Booi de Goede and Flamingo Square.
8. Peripheral development in Sunningdale and Sandown has recorded large increases from a low base, as much of the area was undeveloped in 2012. Development within these larger NDAs, including larger single-residential properties and large blocks of flats within security estates, has been associated with increased property values.
9. Strong growth has continued in Century City, associated with its mix of office, retail and residential land uses, including development around Bridgeway Axis and broader growth within the node.
10. Strong growth is also evident in Sanddrift, adjacent to Century City. Residential areas close to Century City appear to have benefited from proximity to the node.

ALIGNMENT TO SPATIAL POLICY

Changes in property values appear to be strongly associated with locational factors, including proximity to the coast, sea and mountain views, and newer urban developments characterised by more orderly neighbourhood layouts. Dunoon has experienced substantial increases in property values, likely reflecting both a relatively low starting base and ongoing informal redevelopment, including the replacement of single dwellings on individual erven with small-scale rental blocks of flats.

The Valuations Department has also invested significant effort in revaluing properties in Dunoon and other neighbourhoods established under the Less Formal Establishment Act. This may partly explain the large increase in recorded property values when comparing the 2025 valuation with the 2012 figures.



Graph C7-a Blaauwberg: Estimated total value (R) of all properties on the City's general valuation roll (may differ slightly from the Valuations Department's official values as at the date of valuation)

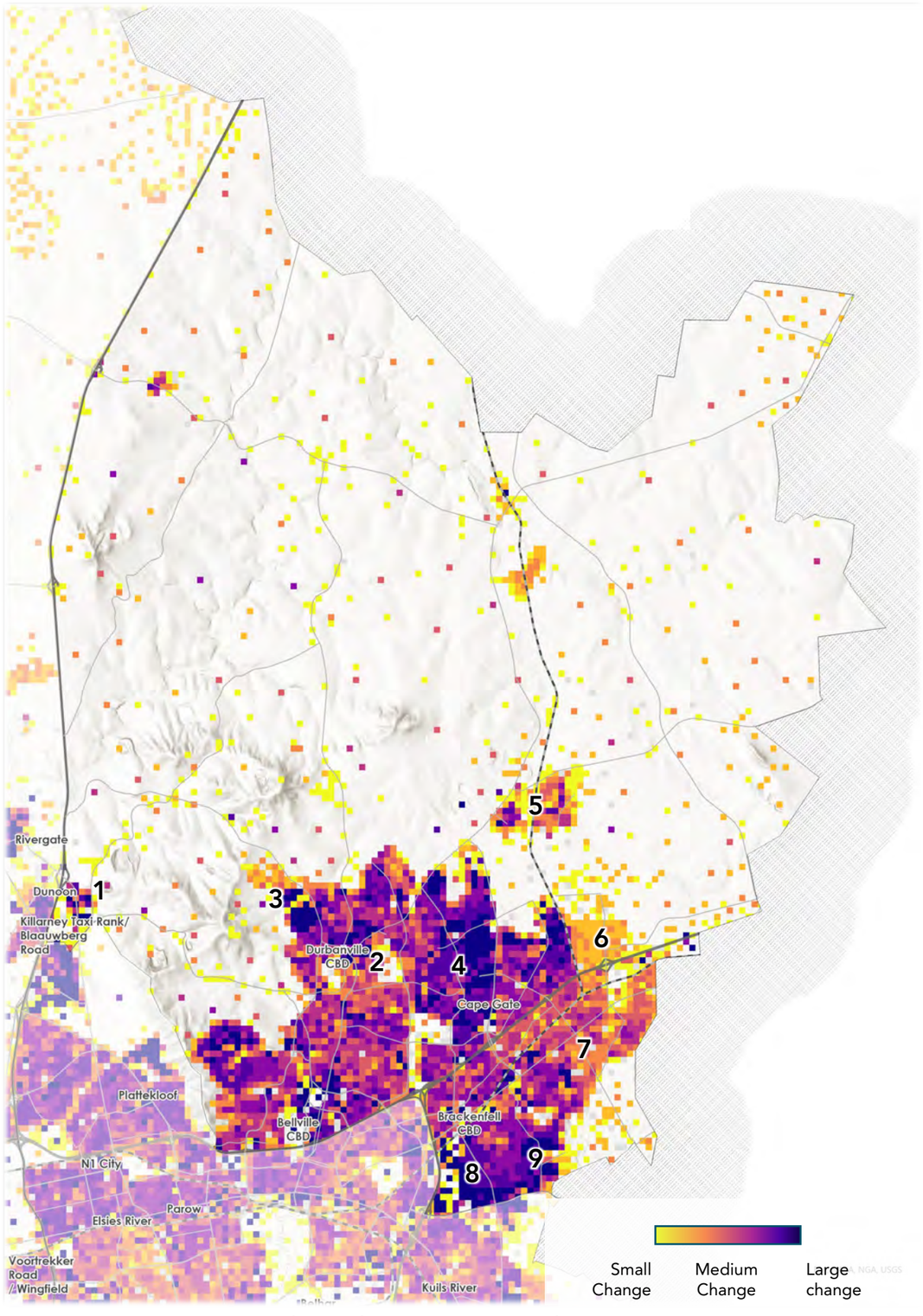
C.7

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

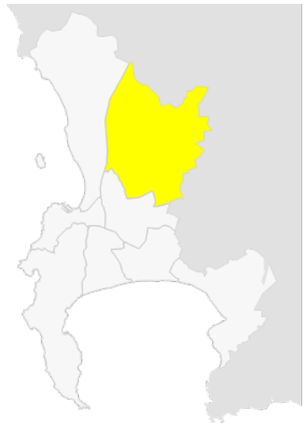
Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)



Map C7-a Northern: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)



LOCAL LEVEL TRENDS

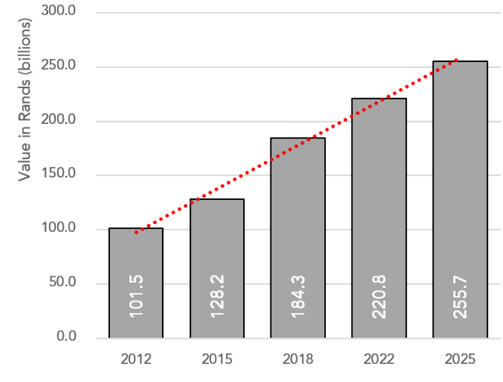
Increases in property values may be associated primarily with redevelopment and upgrading in areas such as Atlas Park industrial area and the Joostenbergvlakte smallholding area, including development associated with approved temporary departures.

Increases are also evident where development rights have been implemented on remaining vacant portions of phased development areas, or where land-use changes have occurred in line with District Plan proposals.

1. Atlas Park industrial area: Property values have increased alongside redevelopment and new development associated with Atlantic Hills.
2. Durbanville CBD: Increases in property values may be associated with redevelopment to higher-density residential and commercial uses, as promoted in the 2023 District Plan.
3. Clara-Anna Fontein Lifestyle Security Estate: Land-use approvals were obtained prior to 2012, when the land was still agriculturally zoned. Subsequent low-density, higher-income residential development, including a private school, has been associated with large increases in property values.
4. Pinehurst, Kraaifontein: Implementation of medium-density, open-market residential development, including private schools and security estate/townhouse complexes, on previously vacant land has been associated with large increases in property values since construction began approximately a decade ago.
5. Fisantekraal/Greenville: Implementation of subsidised human settlement development by Garden Cities has been associated with increases in property values, although these remain relatively small compared with higher-income residential security estates (see points 3 and 4 above).
6. Joostenbergvlakte smallholdings: Small increases in property values are associated with approved land-use departures. For properties to the north, these may also relate to consent uses permitted under agricultural/rural zoning.
7. Scottsdene: Property values have increased alongside the implementation of subsidised and social housing development by Calgro.
8. Brackengate 2 Industrial Area: Development of large-scale distribution centres on previously vacant agricultural land has been associated with significant increases in property values between 2012 and 2025, comparable in magnitude to changes recorded in the Cape Town CBD.
9. Brackenfell security estates: Infill development and redevelopment, predominantly associated with GR1 development on former smallholdings along Kruis Road, have been associated with large increases in property values from a previously low vacant-land base.

ALIGNMENT TO SPATIAL POLICY

Changes in property values cannot be directly attributed to approved spatial policy. Increases in valuation have occurred mainly through redevelopment, infill development, including phasing within development areas, and formalisation through the provision of top structures in subsidised human settlement projects. However, increased land-use diversity and intensification in the Durbanville CBD may be associated with approved spatial planning policy, as the area is identified as an urban node where mixed-use development is promoted in the District Plan.



Graph C7-a Northern: Estimated total value (R) of all properties on the City's general valuation roll (may differ slightly from the Valuations Department's official values as at the date of valuation)

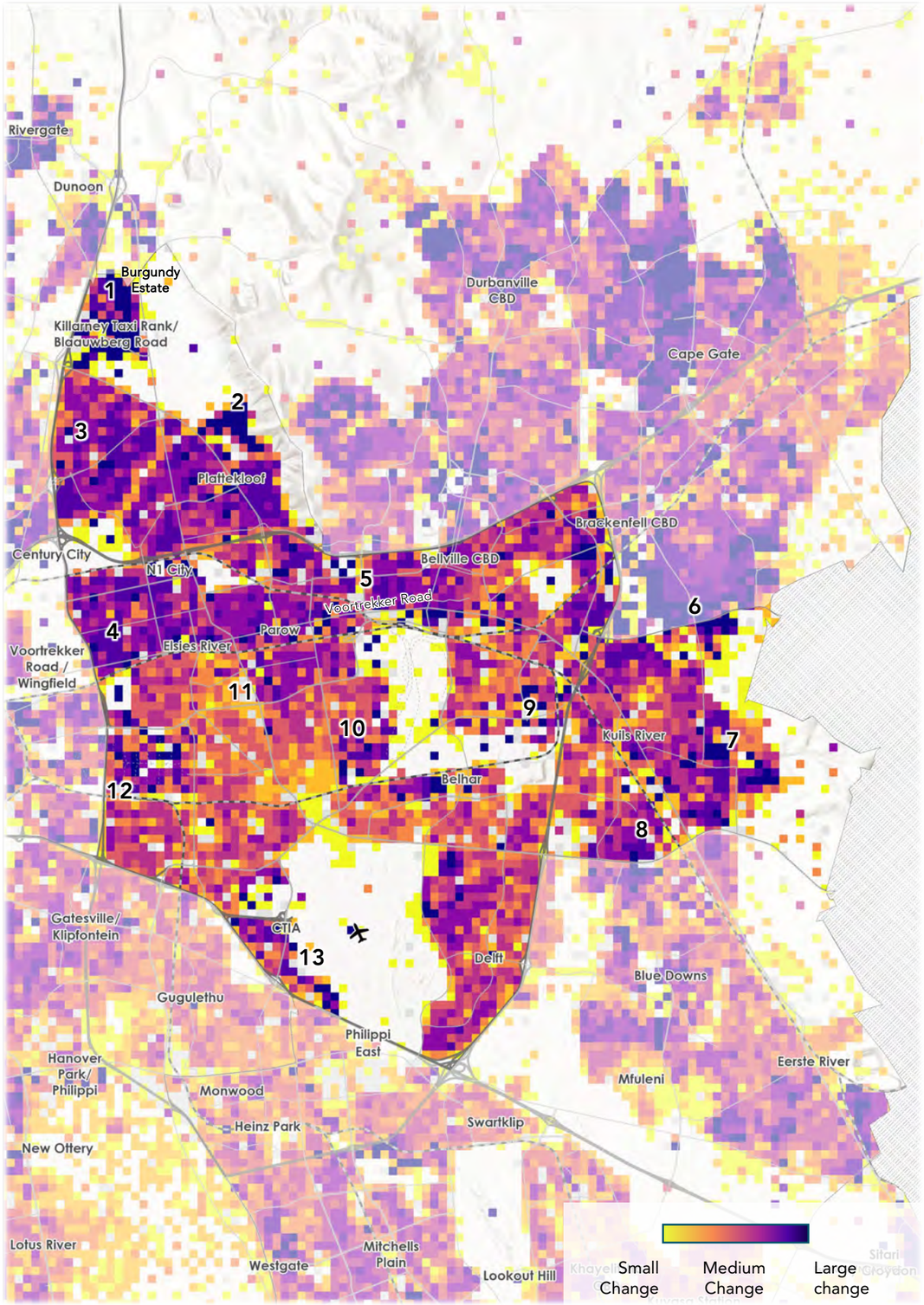
C.7

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

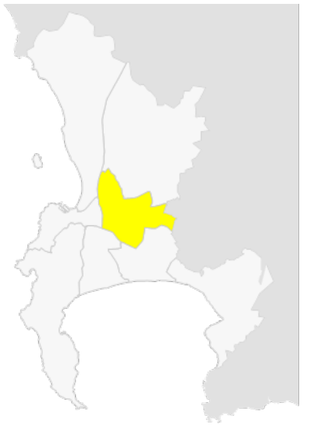
Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)



Map C7-a Tygerberg: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



ALIGNMENT TO SPATIAL POLICY

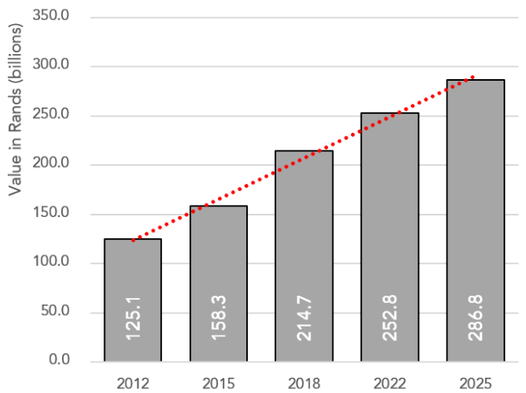
Changes in property values between 2012 and 2025 appear to be associated with increasing residential densities, particularly in areas where redevelopment has occurred along high-accessibility routes and where large-scale, open-market residential developments, predominantly in security-complex typologies, have been implemented. The largest increases in property values are evident in employment areas designated for industrial use, as well as in neighbourhoods north of the N1 and along Voortrekker Road.

LOCAL LEVEL TRENDS

The following areas show significant changes in property values:

1. Burgundy Estate: Substantial increases are associated with implementation of medium- to high-density residential development, predominantly general residential, on previously undeveloped land.
2. Baronetcy Estate and De Plattekloof Lifestyle Retirement Village: Substantial increases are associated with implementation of open-market residential development (SR1), in close proximity to key hospitals and higher-income neighbourhoods.
3. Established residential suburbs: Increases in property values may be associated with property upgrades following the rollout of the MyCiTi bus service. These are well-located single-residential suburbs with access to good schools.
4. Voortrekker Road Corridor (VRC) north to Milton Road: Increases may be associated with redevelopment of existing properties to higher-density residential uses and appear to align with the land-use diversity indicator (see C5).
5. Voortrekker Road Corridor between Parow and Bellville: Increases may be associated with redevelopment to a wider mix of land uses and similarly align with the land-use diversity indicator (see C5).
6. Hazendal Gables: Higher-density residential and commercial development has been implemented along Bottelary and Saxdowne Roads on land that was largely vacant a decade ago, including flats, townhouses and a medium-sized neighbourhood shopping centre.
7. Zevenwacht security estates: Property-value increases coincide with infill development of remaining phases, including residential and retail development.
8. Stellendale: Infill general residential development has been implemented within an NDA targeted for medium- to high-density residential development in the District Plan.

9 – 13 Industrial areas: Property values have increased in Sacks Circle, Parow Industria, Beaconvale, Epping 2 and King Air Industria. This is assumed to be associated mainly with redevelopment in these established, well-located and well-serviced industrial areas, some of which benefit from additional institutional and incentive mechanisms such as Special Rating Areas.



Graph C7-a Tygerberg: Estimated total value (R) of all properties on the City's general valuation roll
(may differ slightly from the Valuations Department's official values as at the date of valuation)

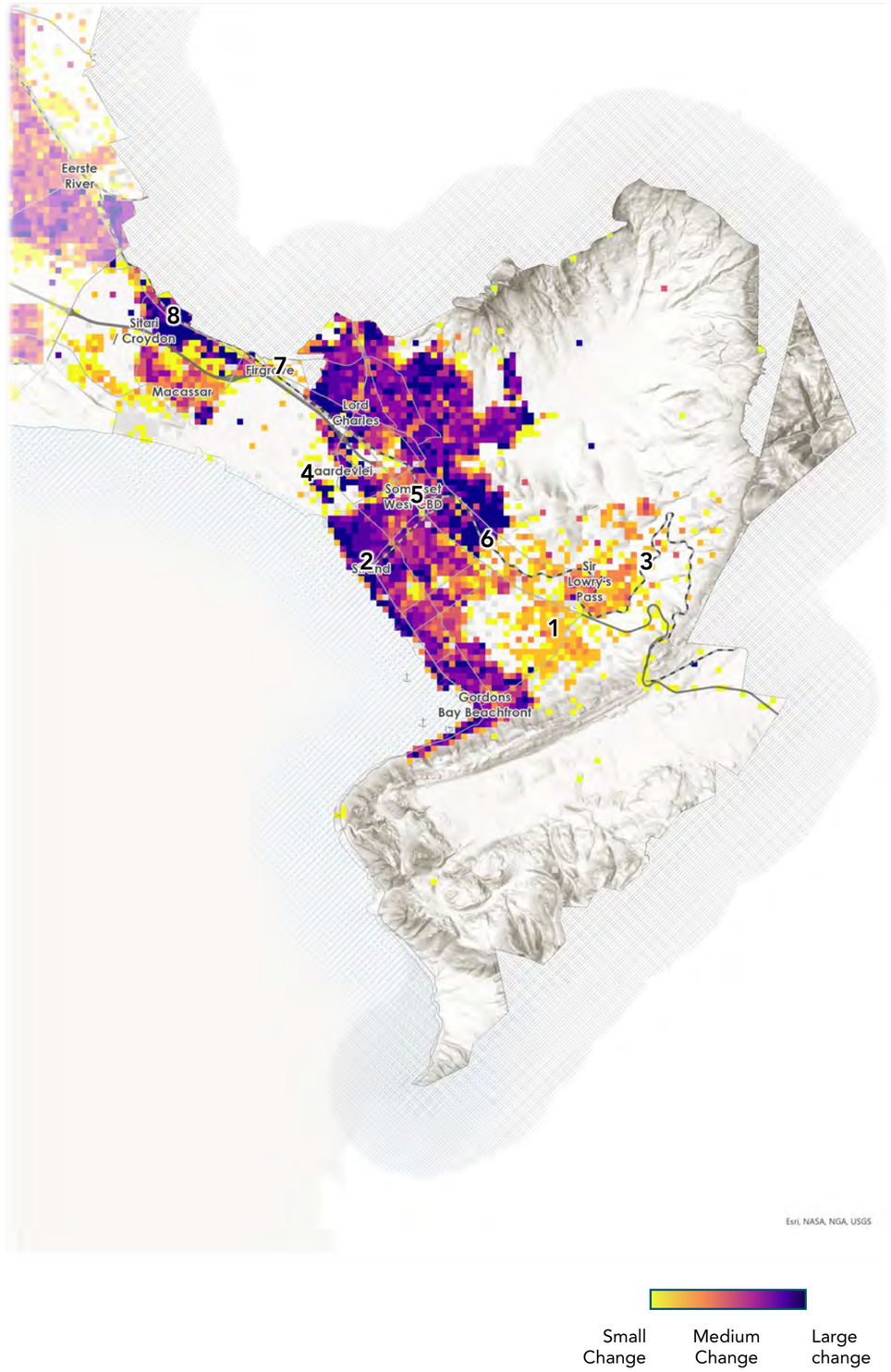
C.7

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

Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)



Map C7-a Helderberg: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)



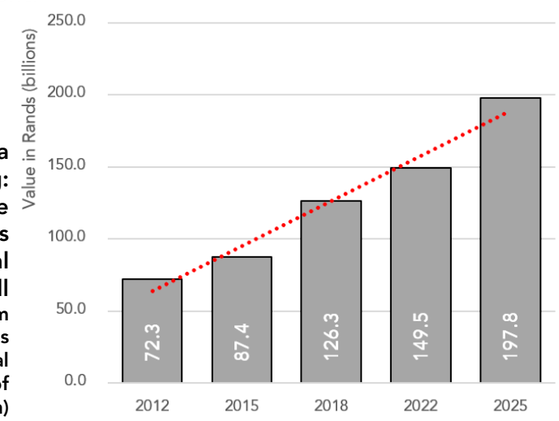
LOCAL LEVEL TRENDS

Changes in property values may be associated primarily with redevelopment and upgrading 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. Increases in property values are also evident where development rights have been implemented on remaining vacant portions of phased development areas, or where land-use changes have occurred in line with District Plan proposals. The largest increases generally occur where land that was vacant in 2012 had been developed by 2022.

1. Sir Lowry's Pass Road: Property values have increased in association with the N2 realignment. Along Sir Lowry's Pass Road, between the existing N2 and Gordon's Bay, increases are also associated with location, road upgrades and changes in land use from residential to uses such as schools and academies.
2. Strand CBD and Beach Road: Property values have increased in association with location, views, amenities, redevelopment and renovations. Beach Road has also experienced a shift from predominantly residential to mixed-use development.
3. Sir Lowry's Pass urban edge: Property values have increased alongside residential estate development, including Tre Donne Country Estate, High Riding Estate and High Riding Country Estate, with further development planned at Casa Maris Luxury Eco Estate.
4. Paardevlei: Property values have increased alongside precinct development comprising a mix of retail, office, industrial, residential, educational and healthcare uses, including Sanctuary Shopping Centre and Busamed Private Hospital.
5. Somerset West CBD: Increases in property values are associated with land-use change and a growing mix of office, retail, light industrial, residential, educational and medical uses. Residential development includes retirement villages, multi-residential complexes such as Hageland Estate and single-residential complexes such as Sea View Lake Estate.
6. Above the T2 between Sir Lowry's Pass and Somerset West: Property values have increased alongside non-residential development, including Monkey Town and light-industrial and retail uses on land that was vacant or agricultural approximately a decade ago.
7. Along the N2 between Somerset West and Firgrove local nodes: Property values have increased alongside residential complex development.
8. Croydon, Sitari and Kelderhof luxury security estates: Property values have increased alongside residential estate development comprising both single- and multi-residential development.

ALIGNMENT TO SPATIAL POLICY

Changes in property values cannot be directly attributed to approved spatial policy. Increases in valuation have occurred mainly through new development on previously vacant, agricultural or underutilised land, redevelopment, infill development within phased development areas, and the formalisation of top structures in lower-income areas. These changes have, however, generally occurred within the framework of approved spatial planning policy.



Graph C7-a Helderberg: Estimated total value (R) of all properties on the City's general valuation roll (may differ slightly from the Valuations Department's official values as at the date of valuation)

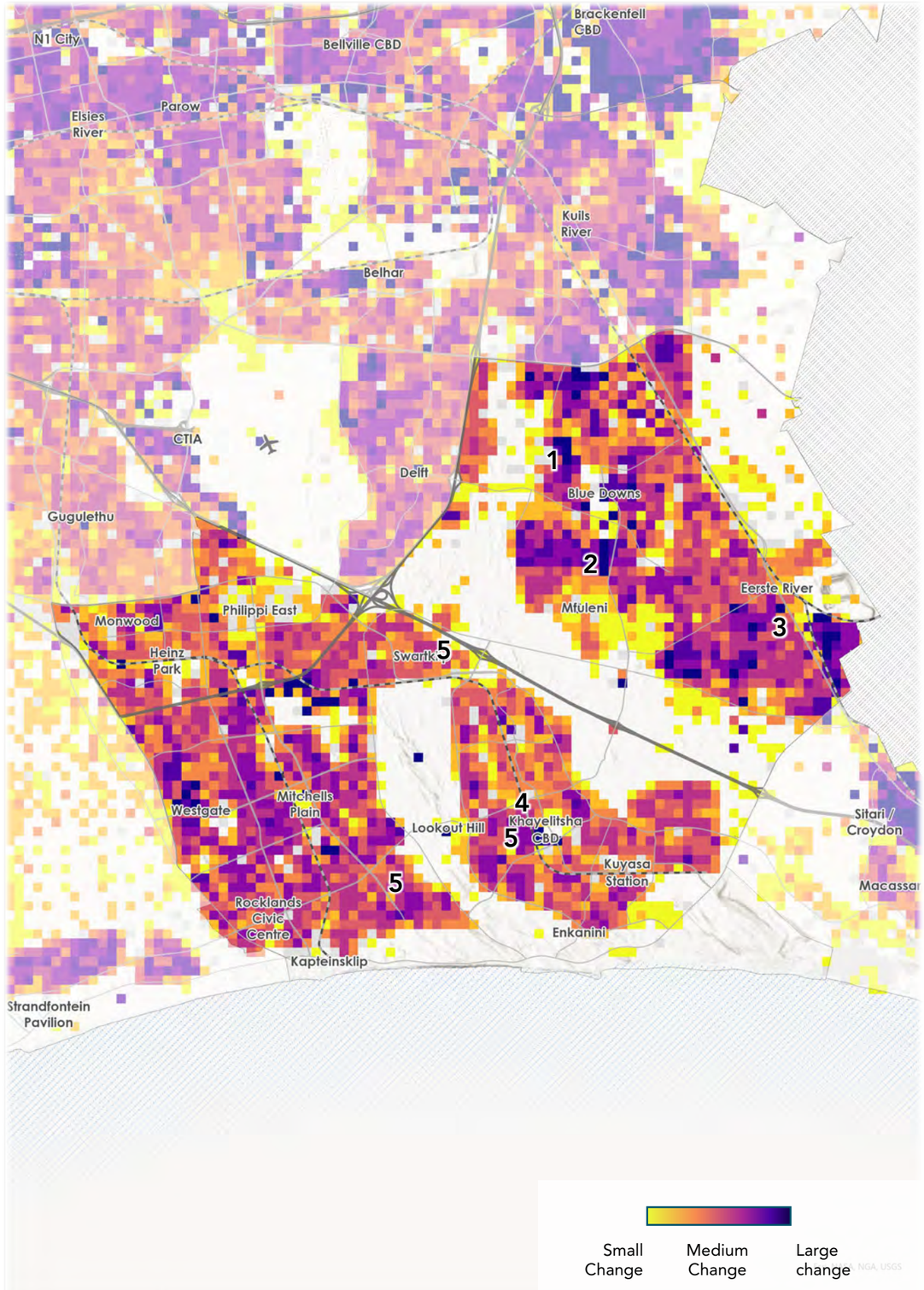
C.7

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

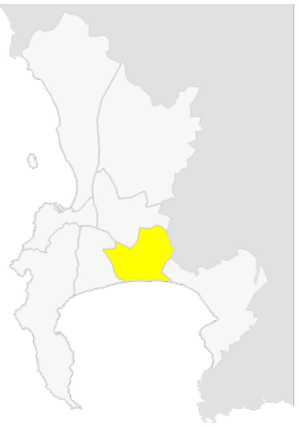
Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)



Map C7-a KMPGBD: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)

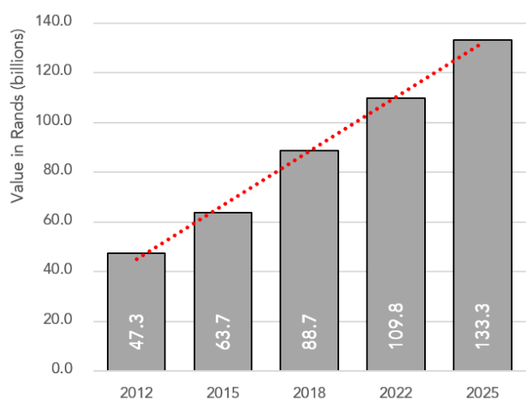


LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

The distribution of changes in aggregate property value broadly reflects patterns of urban development and investment across the district. Larger increases are evident in Blue Downs, Mfuleni, Greater Eerste River and parts of Mitchells Plain, including established and expanding residential areas. Changes are also evident within established urban areas, including Khayelitsha, although the pattern is uneven. These trends broadly align with the spatial policy objective of accommodating development within the existing urban footprint. However, increases in aggregate property value do not necessarily indicate improved affordability or demonstrate the effectiveness of spatial policy interventions.

1. Hagley and northern Blue Downs: Significant increases in aggregate property value are evident across parts of northern Blue Downs, particularly in areas experiencing residential expansion.
2. Southern Blue Downs and Mfuleni: A broad concentration of larger increases is evident across established residential neighbourhoods and areas of more recent development.
3. Greater Eerste River: Larger increases are concentrated within parts of the established residential area and surrounding development areas, indicating continued change in the formal property base.
4. Spine Road and surroundings of Khayelitsha CBD: Changes are uneven, with pockets of medium and larger increases within the established urban area. The indicator does not establish whether these relate to new development or improvements to existing properties.
5. Site C and the Swartklip edge: A mixture of medium and larger increases is evident, particularly along the northern edge of Khayelitsha and adjoining established residential areas.
6. **Central Khayelitsha: Changes vary across established neighbourhoods around the CBD, with localised larger increases occurring alongside areas of more moderate change.**
7. **Mitchells Plain and Rocklands: Widespread medium and larger increases are evident across established residential neighbourhoods, with notable concentrations around Rocklands and surrounding areas.**

Note: The indicator reflects nominal changes in aggregate recorded property values between 2012 and 2025. It does not distinguish between new development, improvements to existing properties and general valuation changes, and is not adjusted for inflation.



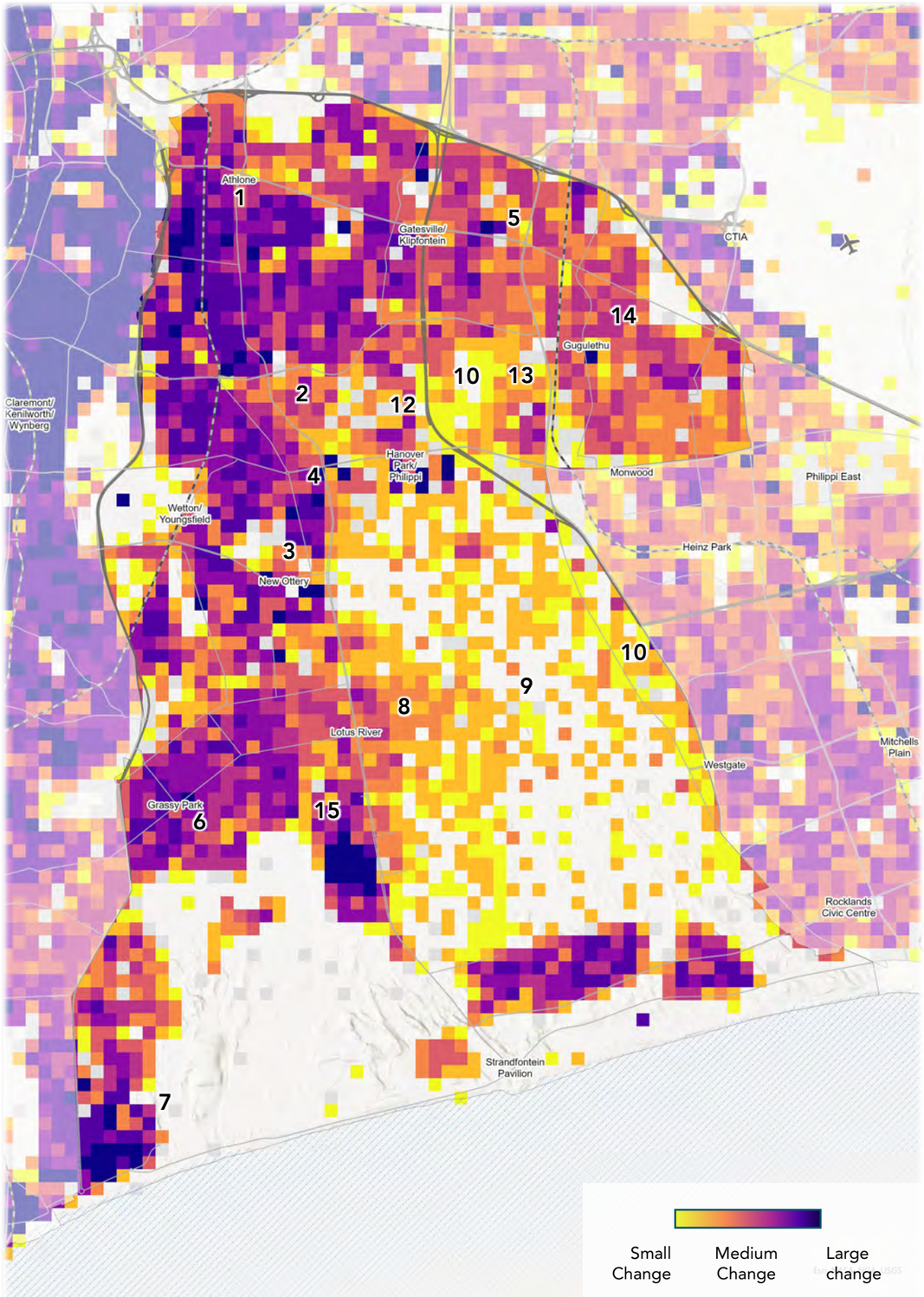
Graph C7-a KMPGBD: Estimated total value (R) of all properties on the City's general valuation roll
(may differ slightly from the Valuations Department's official values as at the date of valuation)

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

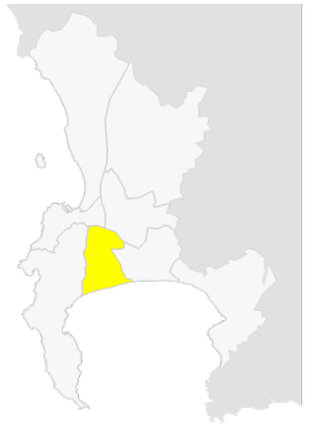
Data Source: CCT Valuation Rolls (2012, 2015, 2018, 2022, 2025)



Map C7-a Cape Flats: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

CAPE FLATS DISTRICT (G)



LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

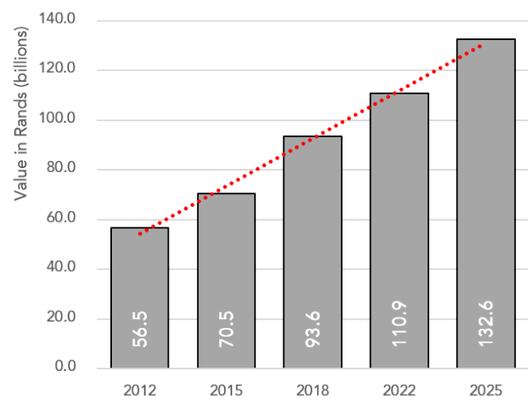
Between 2012 and 2025, property values increased most in the established western parts of the district and in areas of new formal development, with more moderate increases in the east. The pattern broadly aligns with spatial policy, with the largest changes concentrated in nodes, development corridors, mixed-use intensification areas and industrial areas.

The strongest increases were recorded in the [1] Athlone district node and [2] Pinati and Belthorn, extending along the Klipfontein Road and Govan Mbeki Road corridors. Values also increased around the [3] Ottery district node, [4] Lansdowne industrial area, [5] Heideveld and the Turf Hall/Racecourse Road area, where established locations and supportive spatial designations coincide with reinvestment and changes in use. [6] Grassy Park recorded similarly strong growth, particularly around the Victoria Road mixed-use intensification area.

[7] New formal development areas in Pelican Park, Capricorn and Vrygrond, and along Spine Road in Strandfontein, recorded large increases in property values, broadly reflecting the residential growth shown in C3.

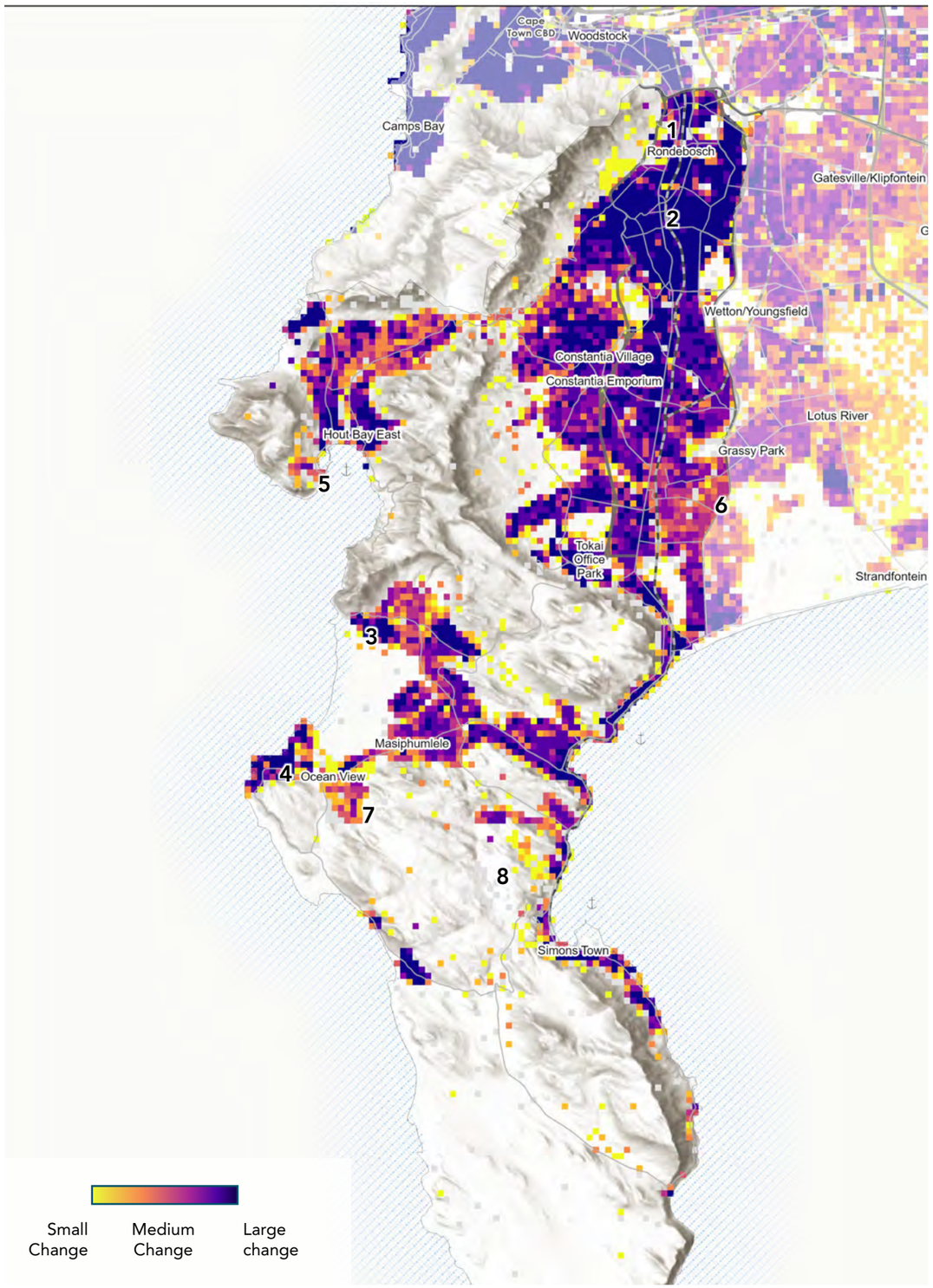
By contrast, [8] Schaapkraal, the [9] PHA and the [10] Weltevreden Wedge recorded small to moderate changes. Although Schaapkraal and parts of the Wedge are transitioning from smallholdings to urban uses in line with spatial policy, this is not yet strongly reflected in property values. In [11] Primrose Park and Sand Industria, businesses have occupied previously vacant land, although property-value changes remain modest.

The lowest increases were recorded in [12] Hanover Park, [13] Manenberg, [14] Nyanga/Gugulethu and the southern part of [15] Lotus River/Pelican Park. In Nyanga and Gugulethu, strong residential growth has not been matched by non-residential investment (see C4), which may partly explain the slower increase in property values.



Graph C7-a Cape Flats: Estimated total value (R) of all properties on the City's general valuation roll
(may differ slightly from the Valuations Department's official values as at the date of valuation)

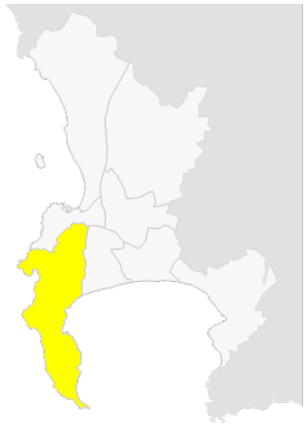
CHANGE IN PROPERTY VALUE (DISTRICT)



Map C7-a Southern: Change in property value (2012 to 2025)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)



LOCAL LEVEL TRENDS AND ALIGNMENT TO SPATIAL POLICY

More recent changes in property values have generally, and perhaps contrary to expectations, been most apparent in the better-located parts of the district, close to or within urban nodes, public transport routes and associated development corridors.

Across the district, three distinct patterns are evident. First, within the [1] Rosebank to Claremont "UCT sphere of influence", increases are associated with new apartment development. The [2] Claremont urban node continues to record high property values and strong growth, alongside good urban management and its continued attractiveness as a satellite financial centre.

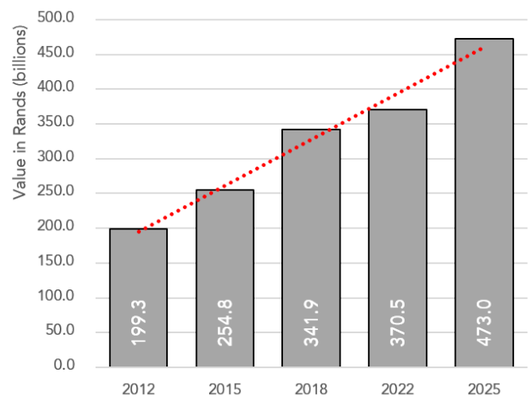
Second, higher-value growth is evident in peripheral valley enclaves, particularly the newer lifestyle-oriented residential areas of [3] Noordhoek and, to a lesser extent, [4] Kommetjie. These areas remain attractive because of their distinctive character, proximity to amenities, and mountain and coastal settings.

Third, lower-income areas are also experiencing increasing development pressure, reflected in population growth, rising land values and redevelopment/intensification. This includes Imizamo Yethu, Hangberg, Westlake, Masiphumelele and Ocean View, where backyard intensification and SSRU development are evident. Similar, although less pronounced, intensification occurs in Grassy Park, Retreat and Steenberg through backyard structures, garage conversions and additional rooms.

Notwithstanding these trends, the lowest valuation changes occur in lower-income areas including [5] Hangberg, [6] Retreat, [7] Ocean View and [8] Dido Valley. Lower changes are also evident on larger erven in peripheral parts of Hout Bay, Noordhoek and Constantia, further from the coast and urban conveniences.

ALIGNMENT TO SPATIAL POLICY

Changes in property values cannot be directly attributed to approved spatial policy. Increases in valuation have occurred mainly through new development on previously vacant, agricultural or underutilised land, redevelopment, infill development within phased development areas, and formalisation through the provision of top structures in lower-income areas. These changes have, however, generally occurred within the framework of approved spatial planning policy.



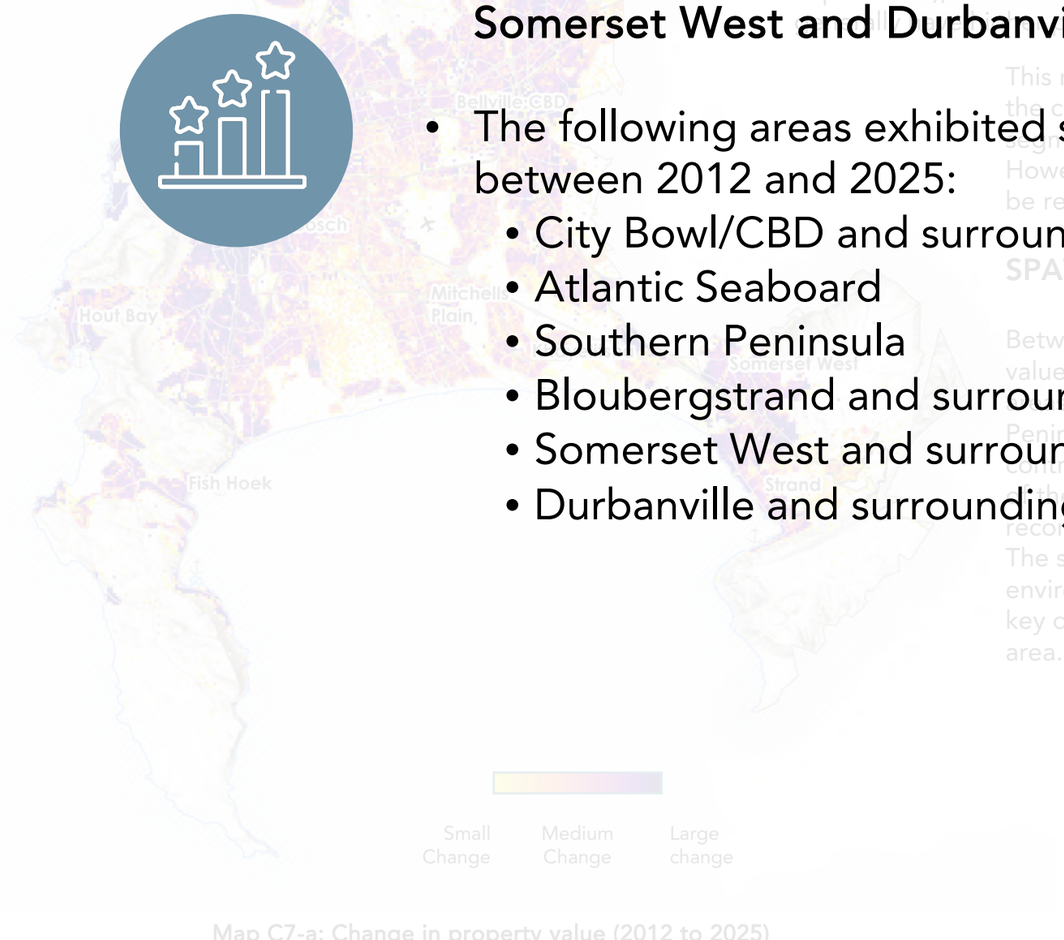
Graph C7-a Southern: Estimated total value (R) of all properties on the City's general valuation roll
(may differ slightly from the Valuations Department's official values as at the date of valuation)

CHANGE IN PROPERTY VALUE

KEY TAKE-AWAY TRENDS:

- **Property values increased across a wide range of areas between 2012 and 2025.** Changes reflect spatially differentiated demand and supply, redevelopment and new development, including development on previously vacant land. The strongest increases were generally concentrated in coastal and high-amenity areas, particularly along the **Atlantic Seaboard, City Bowl, Southern Peninsula, Bloubergstrand, Somerset West and Durbanville**.

- The following areas exhibited some of the strongest growth in property values between 2012 and 2025:
  - City Bowl/CBD and surrounds
  - Atlantic Seaboard
  - Southern Peninsula
  - Bloubergstrand and surrounding growth areas
  - Somerset West and surrounds
  - Durbanville and surrounding growth areas



Map C7-a: Change in property value (2012 to 2025)

Graph C7-a: Estimated total value (R) of all properties in the City's general valuation roll (may differ slightly from the Valuations Database as official values as at the date of valuation)



Map C7-b: Property value, 2025

D : LAND AND BUILDING DEVELOPMENT

D1 : New Development Areas

D2 : Areas of informality (2026 Update + New)

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

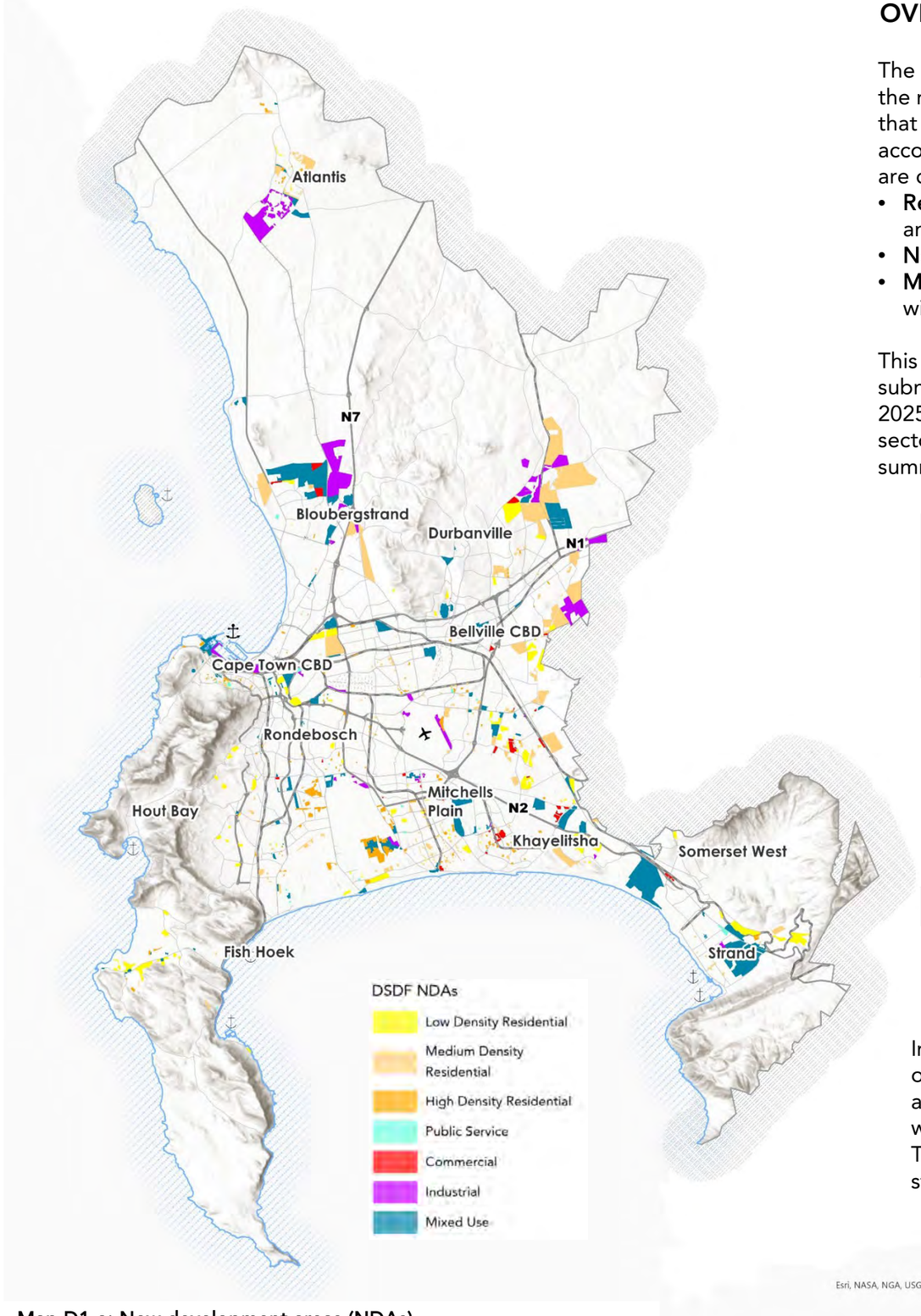
D.1

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:

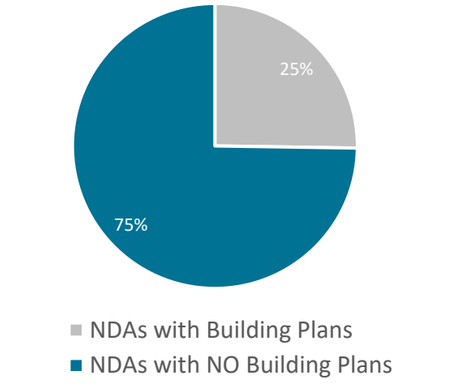
- **Residential NDAs:** Land targeted for potential low gross density (25-45 du/ha), medium gross density (45-75 du/ha) and high gross density (>75 du/ha) residential development.
- **Non-residential NDAs:** Land targeted for commercial, industrial or public service development.
- **Mixed-use NDAs:** 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.

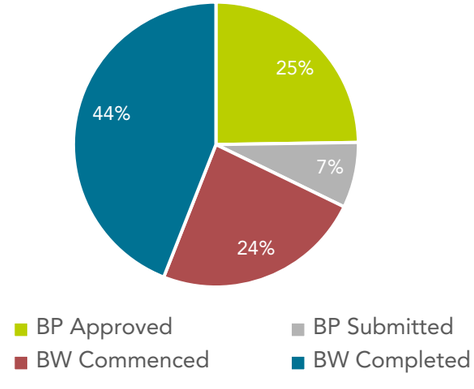
NDA category	Number of NDAs	Area (ha)	NDAs with BPs (no.)
Residential	543	6576	106
Mixed use	139	4362	58
Commercial	50	359	16
Public services	22	94	4
Industrial	78	2194	26
Total	**832**	**13585**	**210**

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)

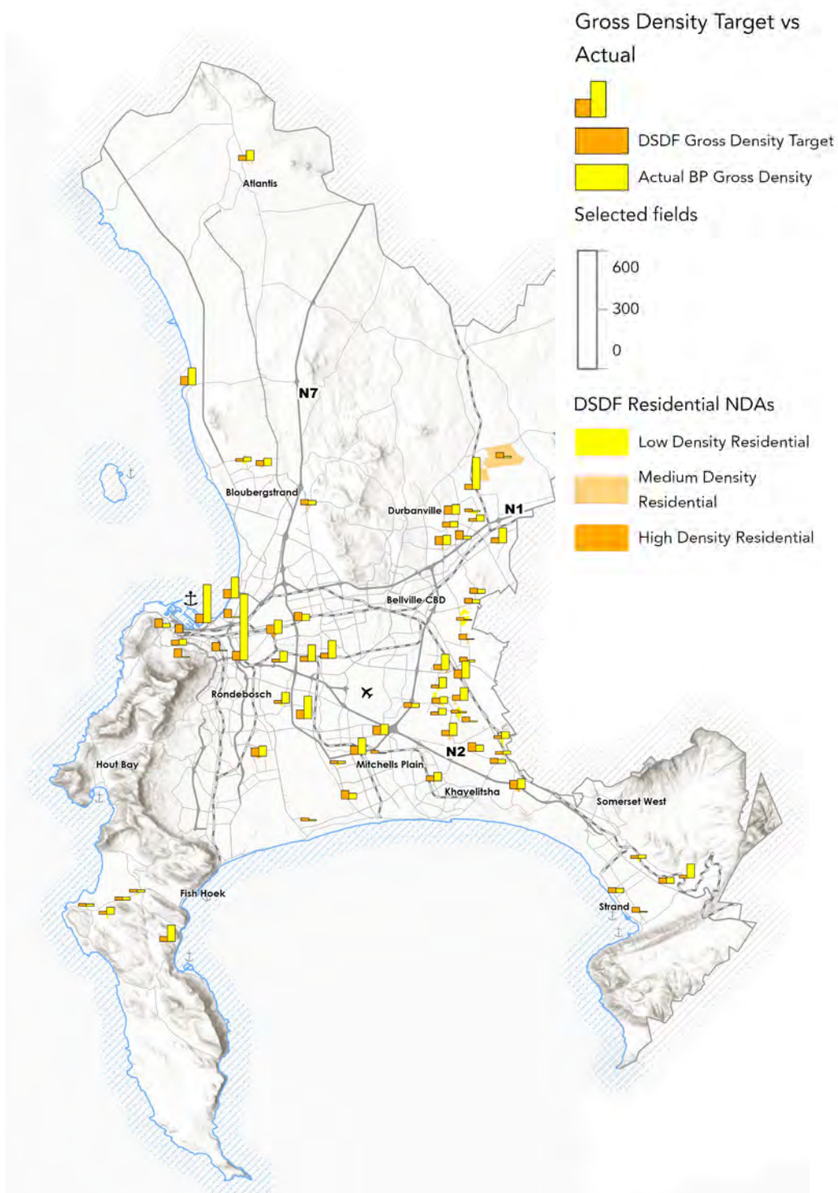
D.1

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.

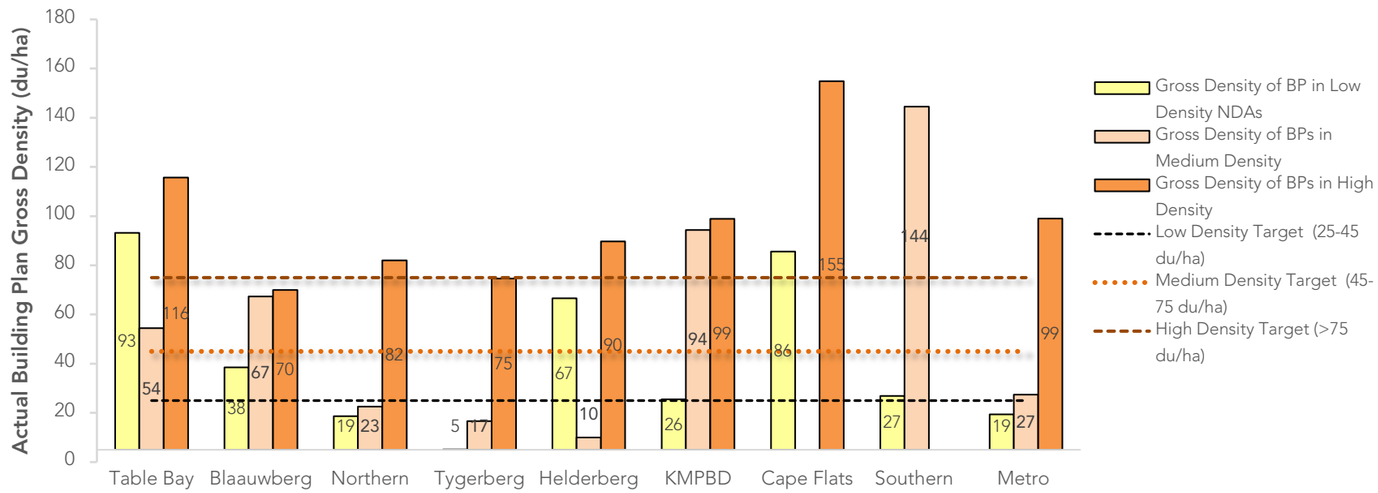


	Table Bay	Blaauwberg	Northern	Tygerberg	Helderberg	KMPBD	Cape Flats	Southern	Metro
Count of Low Density NDAs with BPs	1	1	2	1	2	7	2	4	**20**
Count of Medium Density NDAs with BPs	1	2	7	5	3	7	0	1	**22**
Count of High Density NDAs with BPs	7	3	3	2	1	4	2	0	**26**
Total	**9**	**6**	**12**	**8**	**6**	**18**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

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

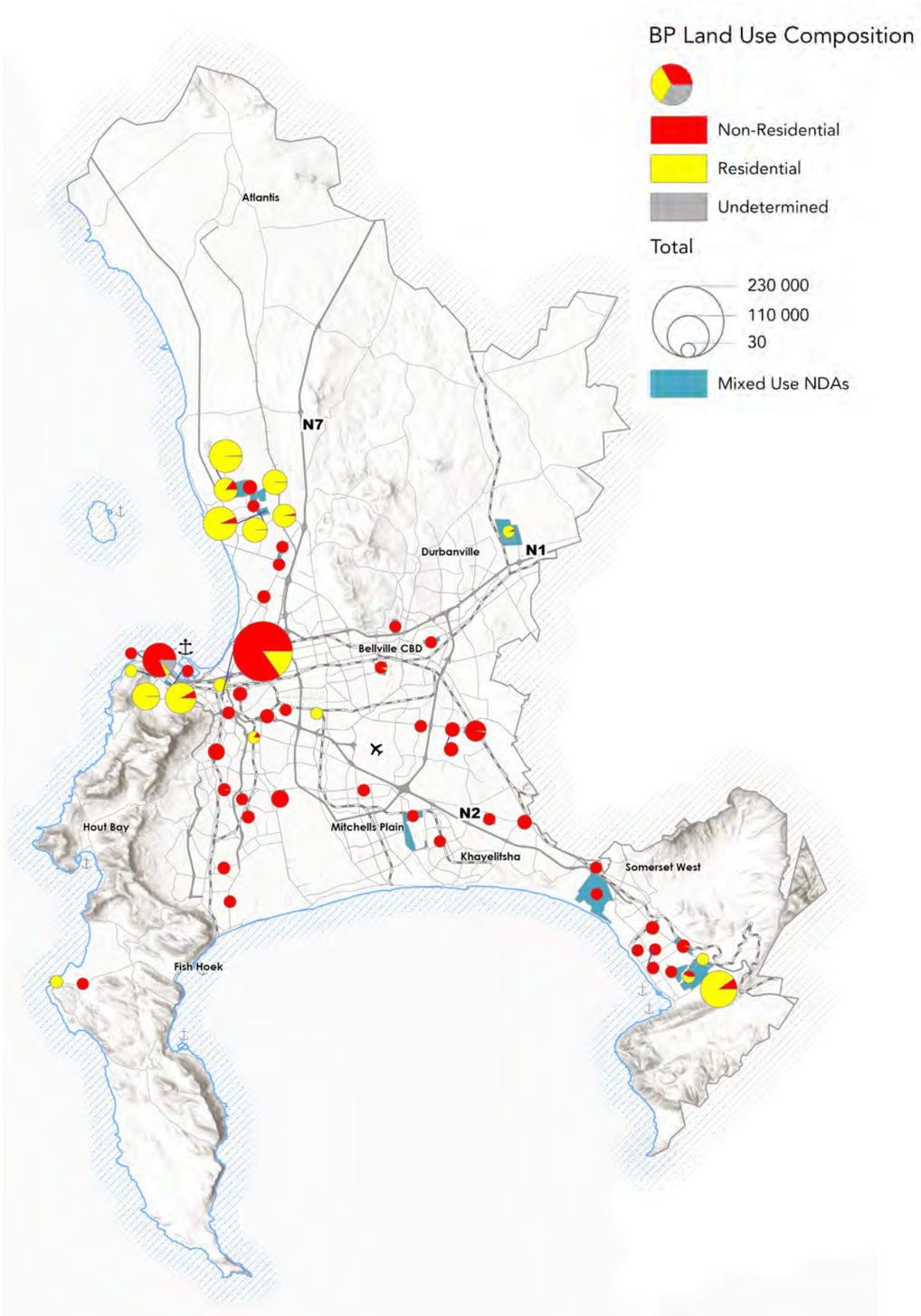
D.1

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-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.

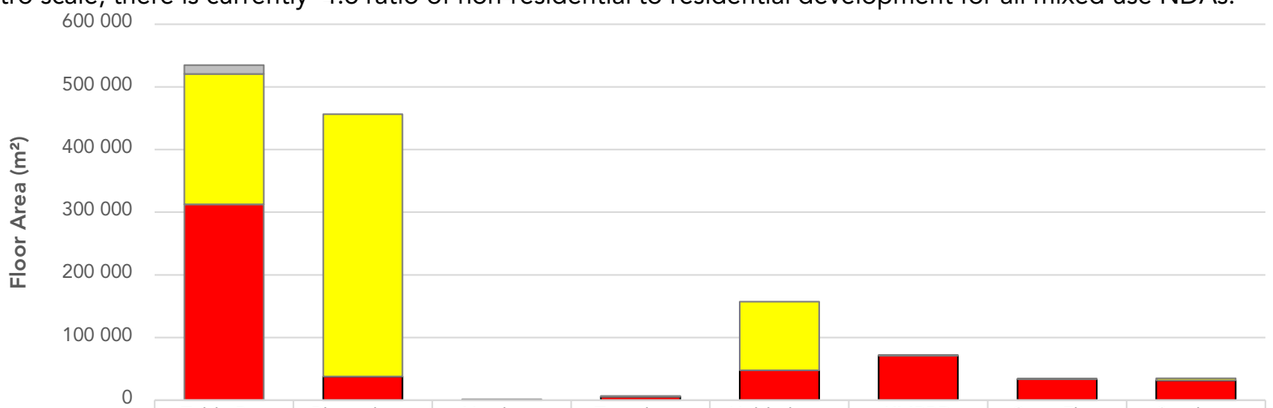


	Table Bay	Blaauwberg	Northern	Tygerberg	Helderberg	KMPBD	Cape Flats	Southern
Sum of Undetermined	14 192							
Sum of Residential	207 986	418 520	1 286	1 574	109 501	987	1 158	3 408
Sum of Non-Residential	312 512	37 813	154	5 314	47 879	71 048	33 529	31 417

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

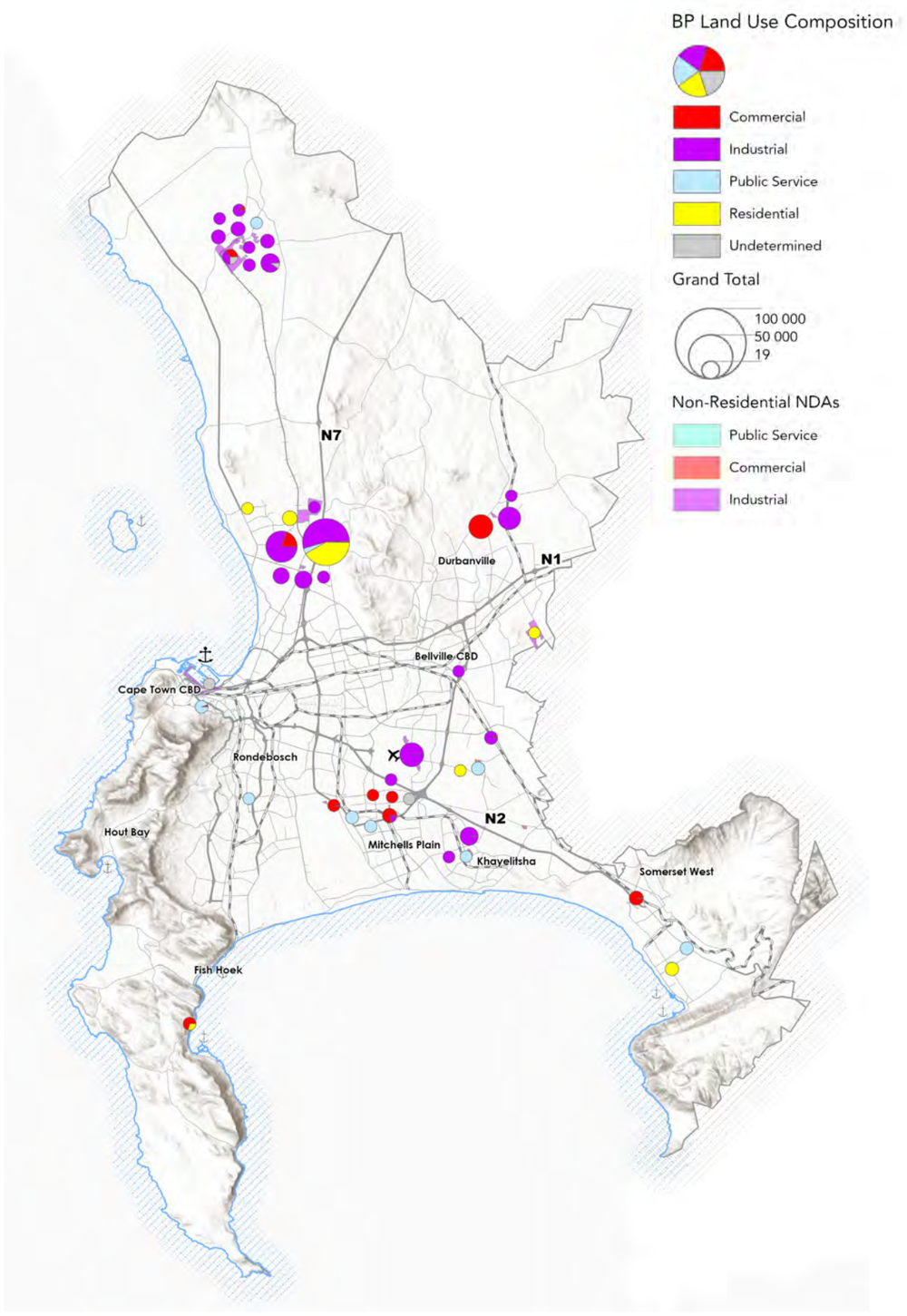
D.1

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-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.

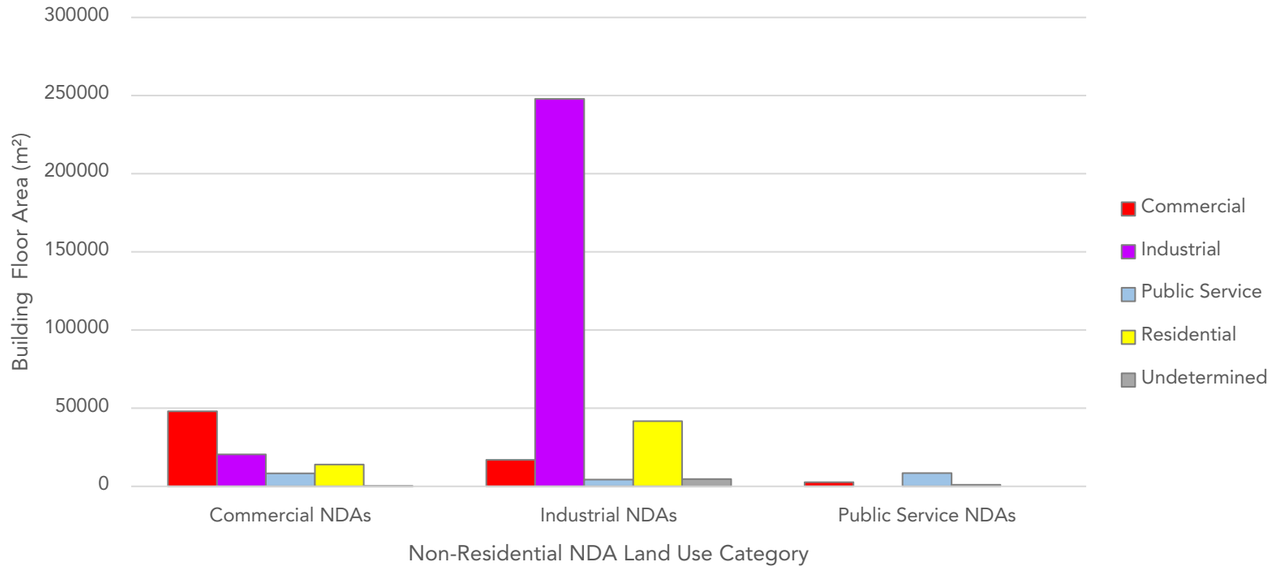
SPATIAL TRENDS

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

D.1

LAND AND BUILDING DEVELOPMENT

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

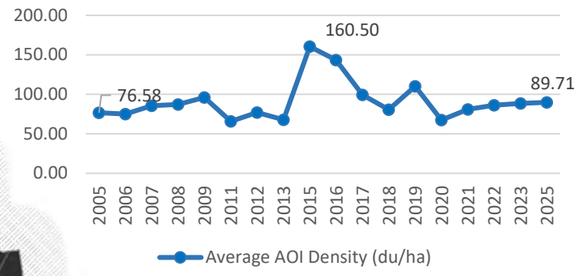
LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (METRO-WIDE)

2026 Update

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Graph D2-a: AOI average density

Map D2-a: Varying location, extent and AOI net density of areas of informality (2025)

OVERALL TREND

By 2025, approximately **283 379 informal structures** were located across areas of informality of varying size and density in Cape Town. This represents an absolute increase of **6 269 structures (2,26%)** compared with 2023, when 277 110 structures were recorded, and an overall increase of approximately 5% since 2022. Growth in informal structures is therefore continuing, although at a slower rate than between 2022 and 2023. Graph D2-a shows the average density of AOIs from 2005 to 2025. Graph D2-b shows changes in the number of structures and extent of areas of informality since 2005. Map D2-a shows AOI net density, calculated as the number of informal structures divided by the AOI extent, for each area at its maximum recorded footprint in 2025. No data were captured for 2024 due to the unavailability of suitable aerial imagery.

SPATIAL TREND (DISTRIBUTION/PATTERN)

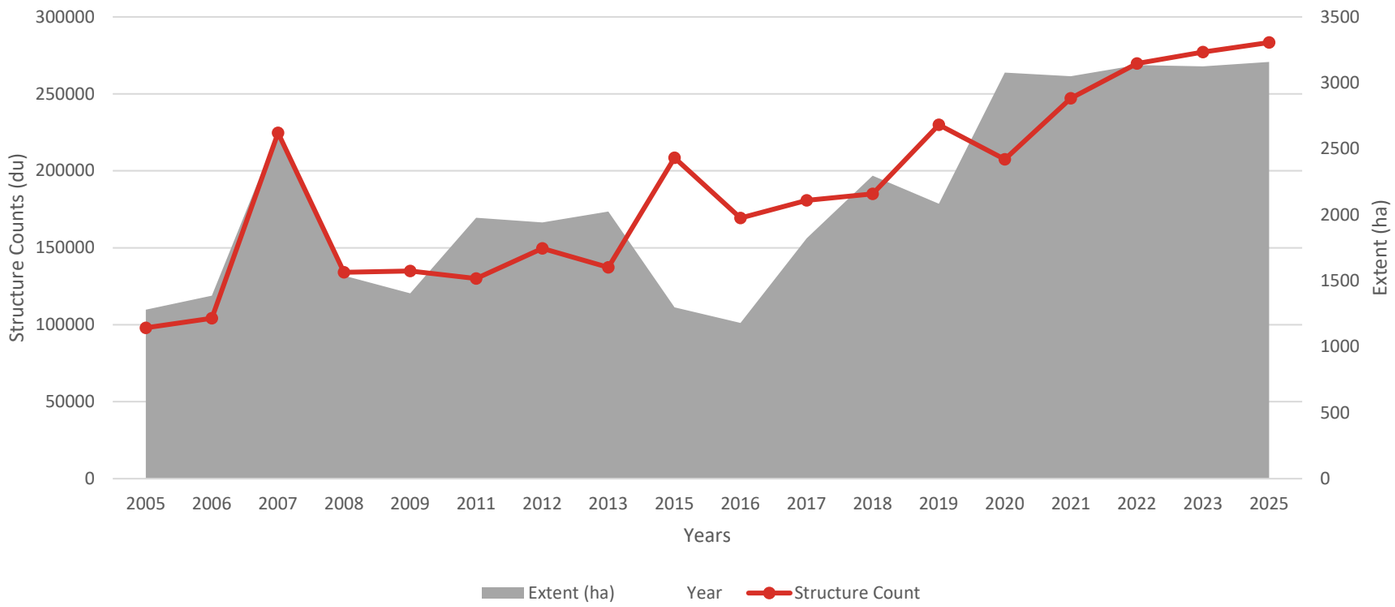
Areas of informality display a clustered spatial pattern, generally within or close to lower-income areas, with larger clusters along the N2, N1 and N7. Although the location of these clusters remains relatively consistent, they may expand in extent and increase in AOI net density over time. Areas may also disappear once formalised or relocated, while new areas form elsewhere.

Map D2-a highlights areas with very high AOI net densities, including Wallacedene, Delft, Gugulethu, Dunoon, Crossroads and the Khayelitsha/Mitchells Plain area. In contrast, areas shown in yellow have lower AOI net densities.

GENERAL ANALYSIS

Areas of informality include land that may be unsuitable or unsafe for residential development, or intended for other urban support functions. Examples 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 relationship with areas of informality where incremental informal settlement upgrading has occurred, particularly in the metro southeast.



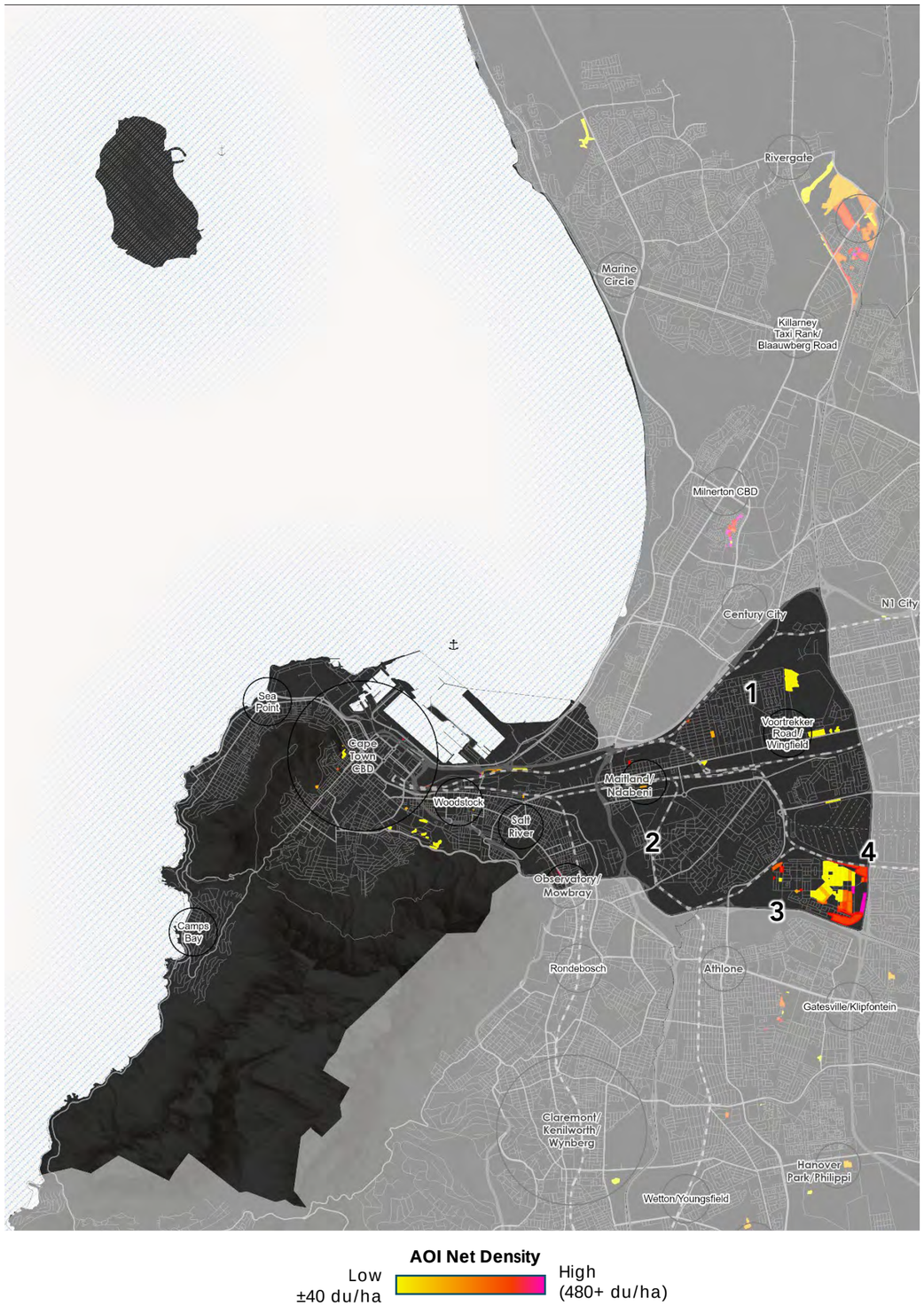
Graph D2-b: Number of informal structures per year, excluding areas of unlawful land occupation

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

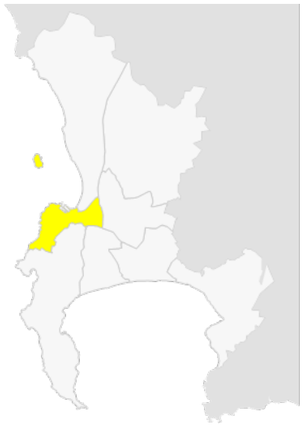
Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a Table Bay: Varying location, extent and density of areas of informality (2002 to 2025)

DISTRICT LEVEL ANALYSIS

TABLE BAY DISTRICT (A)



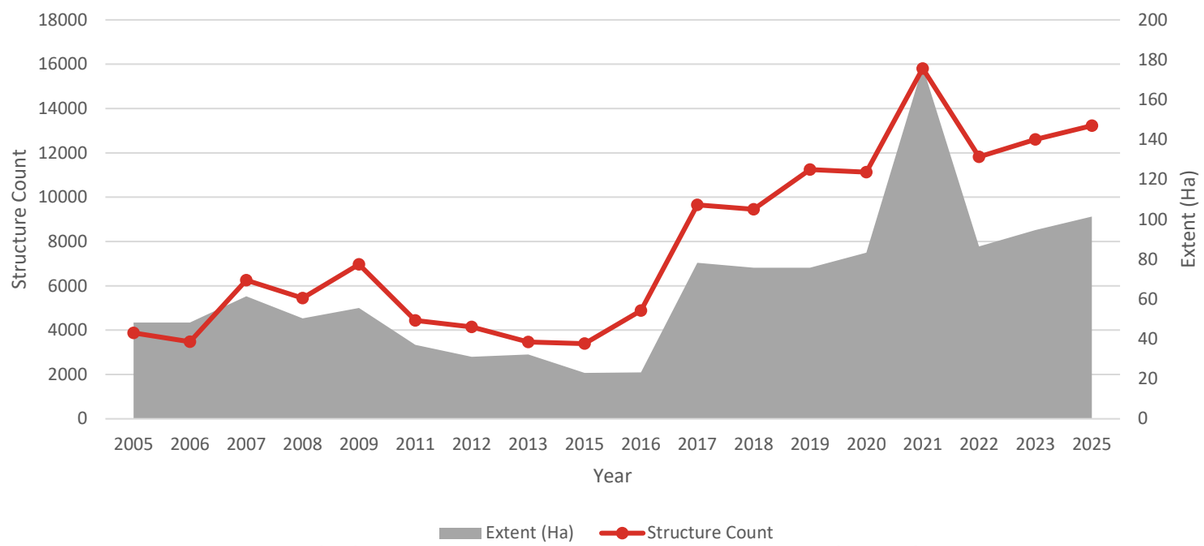
SPATIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality are typically clustered within or adjacent to lower-income areas, with larger concentrations forming along the N2, N1 and N7 corridors. Within the Table Bay District, informality is concentrated in Langa, along the N2. Langa contains some of the densest areas of informality in the district and may also include some of the metro's most established and oldest informal settlements. Density varies within Langa, with the southern areas recording the highest concentrations of informal structures, exceeding 250 du/ha in places, particularly where vacant land has been occupied. Homelessness and "tent cities" have also begun to emerge within the district, particularly in the City Bowl and Sea Point areas.

LOCAL LEVEL TRENDS

1. Factreton and Wingfield: Informality is evident in Factreton, in the north-eastern part of Kensington, and on properties allocated to Ndabeni Trust beneficiaries in the Wingfield area.
2. Maitland Garden Village: Backyarding is evident within the area.
3. Langa: The number of informal structures has increased, including through the occupation of vacant sites identified for other uses, such as the Langa fire station site (Site 4).
4. CBD and District Six: Small, localised informal settlements and "tent cities" have emerged on vacant land (see red dots).

Where areas of informality have been formalised, there appears to be alignment with spatial policy, as in Langa. For example, SPC residential development may reflect incremental informal settlement upgrading where such upgrading has occurred.



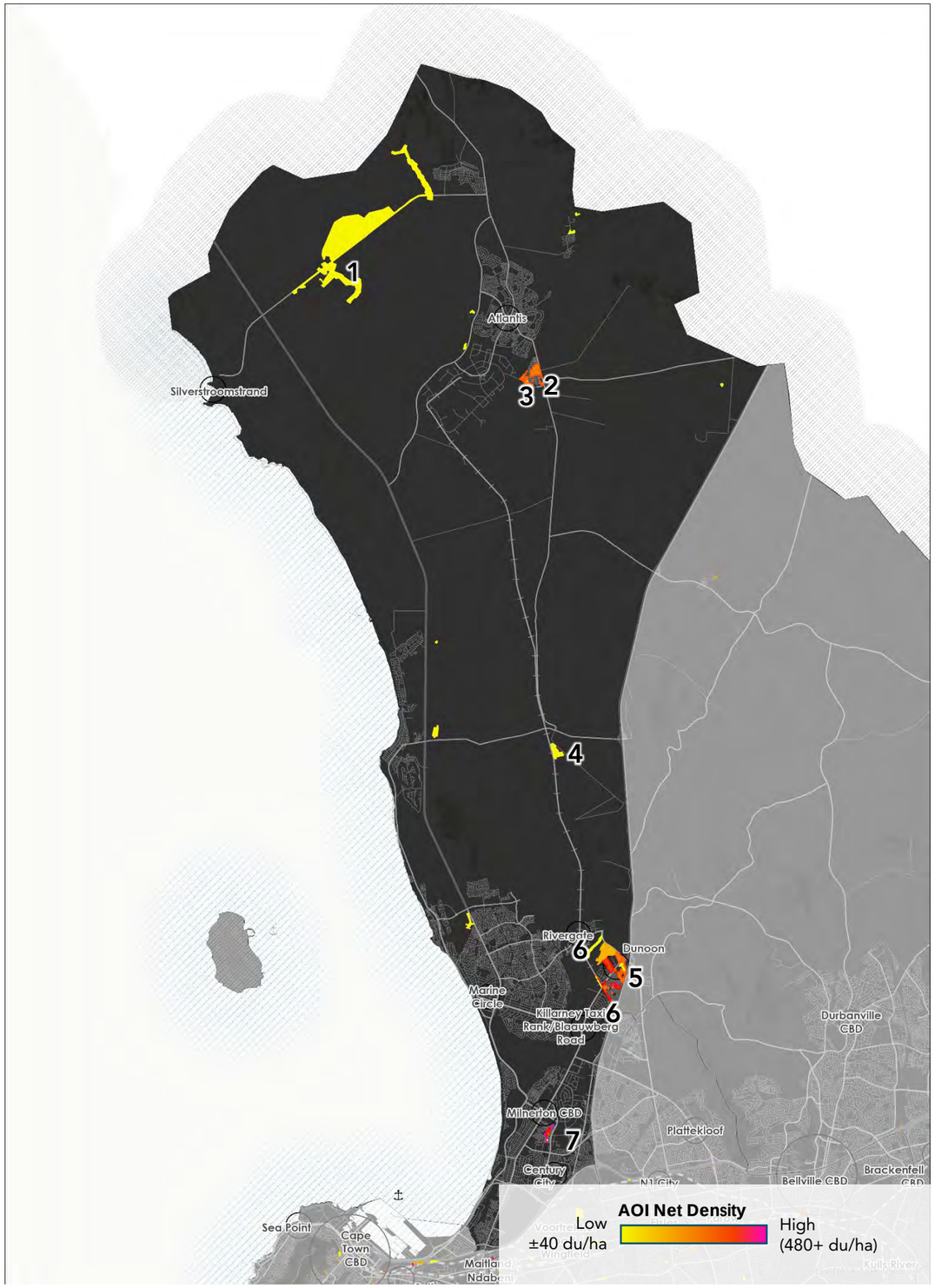
Graph D2-a Table Bay: Number of informal structures per year, excluding areas of unlawful land occupation

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

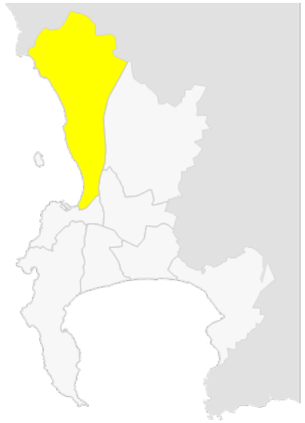
Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a Blaauwberg: Varying location, extent and density of areas of informality (2002 to 2025)

DISTRICT LEVEL ANALYSIS

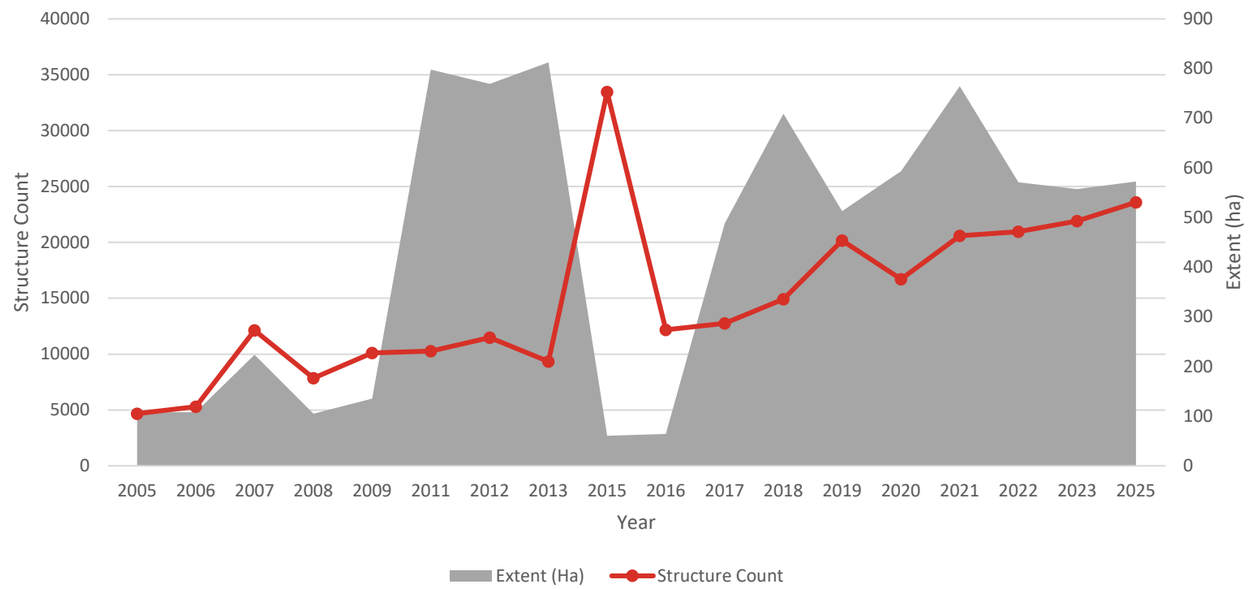
BLAAUWBERG DISTRICT (B)



LOCAL LEVEL TRENDS

1. Silverstream Road: Informal structures and farming occur in a lower-density smallholding area, away from established residential areas.
2. Witsand: Continued high-density informal growth occurs on land intended for the People's Housing Project and facilities, close to Atlantis employment areas and with good road access to Cape Town.
3. Near Atlantis: Informal occupation has occurred on private land near the Atlantis industrial area and Witsand.
4. Wolwerivier: The existing IDA accounts for most development. A small informal settlement has emerged alongside it as households outgrow single IDA units, reflecting limited provision for additional units. Informal densities remain relatively low compared with formal residential densities.
5. Dunoon and surrounds: Informal areas have expanded across Malibongwe towards Rivergate and along the nature reserve. Growth is associated with existing lower-income/RDP housing, proximity to industrial and construction employment, and good public transport access to the CBD and wider city.
6. Land suitability and services: Apart from Doornbach, which is being upgraded, much of the surrounding informal occupation is unsuitable for long-term settlement. Constraints include floodplains, biodiversity areas, NDAs, school sites, public open space and railway reserves. Densities are very high and infrastructure is under strain.
7. Joe Slovo Park: A very high-density area of informality occupies linear public open/stormwater land and a school site. It is well located near industrial employment, Koeberg Road and wider transport connections.

No clear spatial relationship is evident between areas of informality and MyCiTi routes, with other bus and taxi services providing alternative transport.



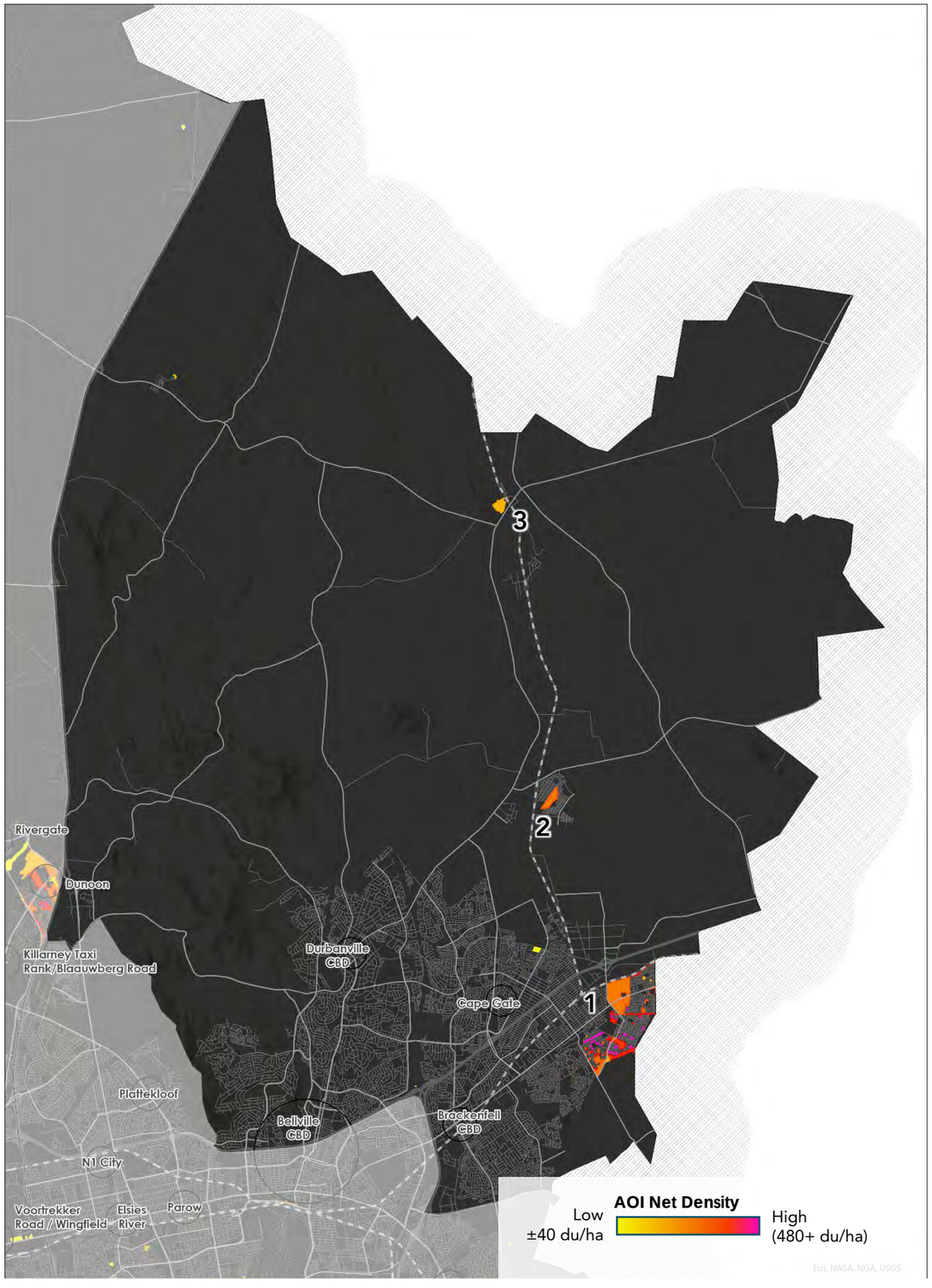
Graph D2-a Blaauwberg: Number of informal structures per year, excluding areas of unlawful land occupation

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

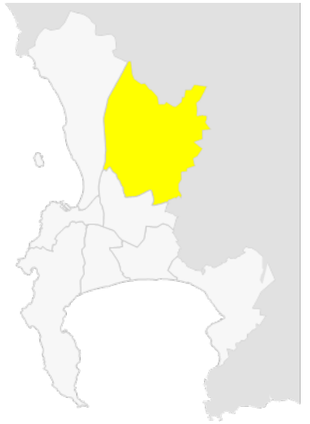
Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a Northern: Varying location, extent and density of areas of informality (2002-2025)

DISTRICT LEVEL ANALYSIS

NORTHERN DISTRICT (C)



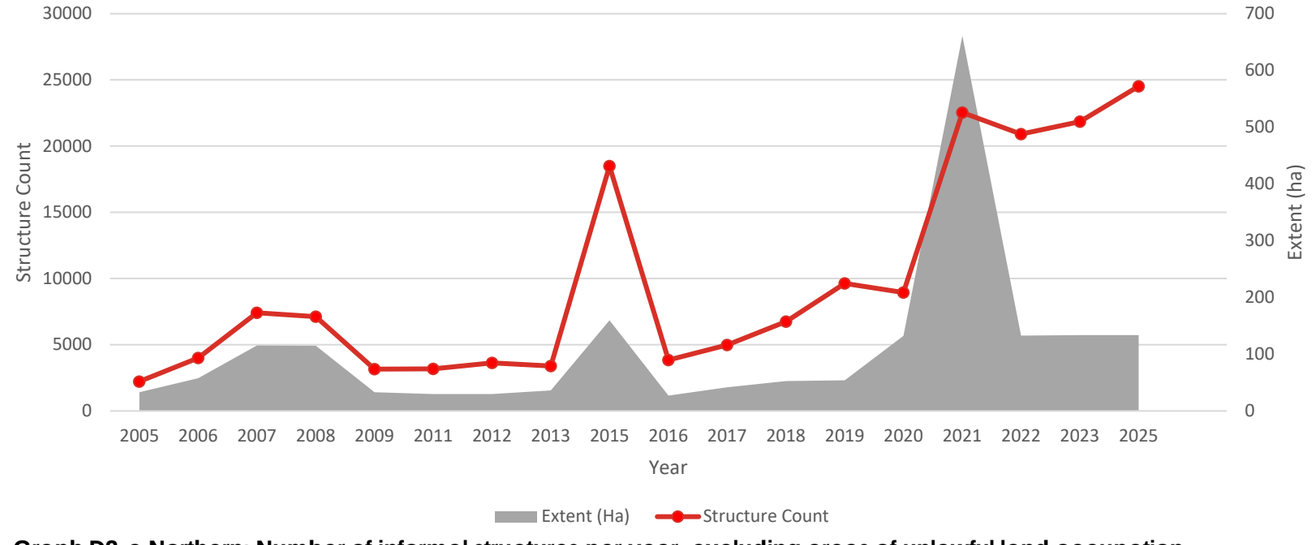
SPACIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality display a clustered spatial pattern, typically embedded within or located close to lower-income areas, with larger concentrations forming along major transport corridors. There was a significant increase in the number of informal structures in 2015, again after 2019, and more markedly after 2021. The increase in informal structures in areas such as Klipheuwel and Bloekombos/Wallacedene cannot be directly linked to approved spatial policy, given the unplanned nature of informal settlement growth.

LOCAL LEVEL TRENDS

The main areas showing a clear increase in informal structures are Wallacedene, particularly the Maroela North and South development areas, and Klipheuwel. Growth in Wallacedene was especially notable during the COVID-19 period. Klipheuwel has not been identified as an NDA, as the original resolution was that the informal settlement should be incorporated into the Greenville (Garden Cities) development at Fisantekraal.

1. Maroela North and South, Wallacedene: Unlawful land occupation has occurred within areas identified as NDAs in the 2012 and 2023 District Plans and earmarked for government housing programmes. This occupation has constrained the planned housing development.
2. Fisantekraal: The informal settlement forms part of the Greenville development area (NDA). It is understood that the current informal-settlement residents do not qualify for subsidised housing.
3. Klipheuwel informal settlement: The settlement is not identified as an NDA. The original objective was to relocate the settlement to Fisantekraal.



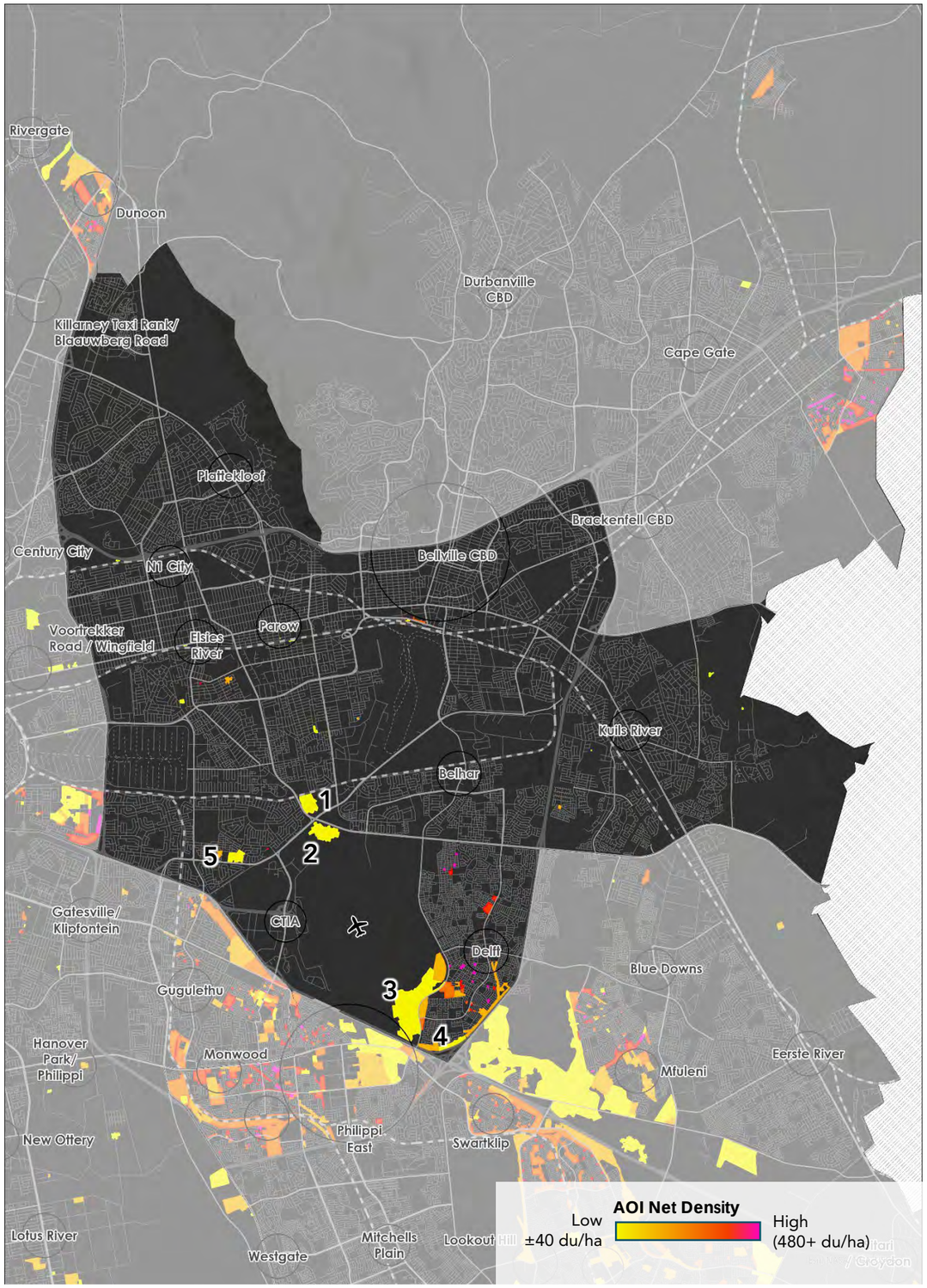
Graph D2-a Northern: Number of informal structures per year, excluding areas of unlawful land occupation

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

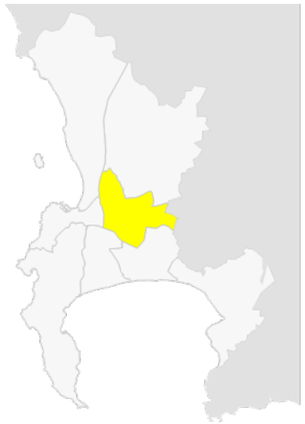
Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a Tygerberg: Varying location, extent and density of areas of informality (2002 to 2025)

DISTRICT LEVEL ANALYSIS

TYGERBERG DISTRICT (D)



SPATIAL TREND (DISTRIBUTION/PATTERN)

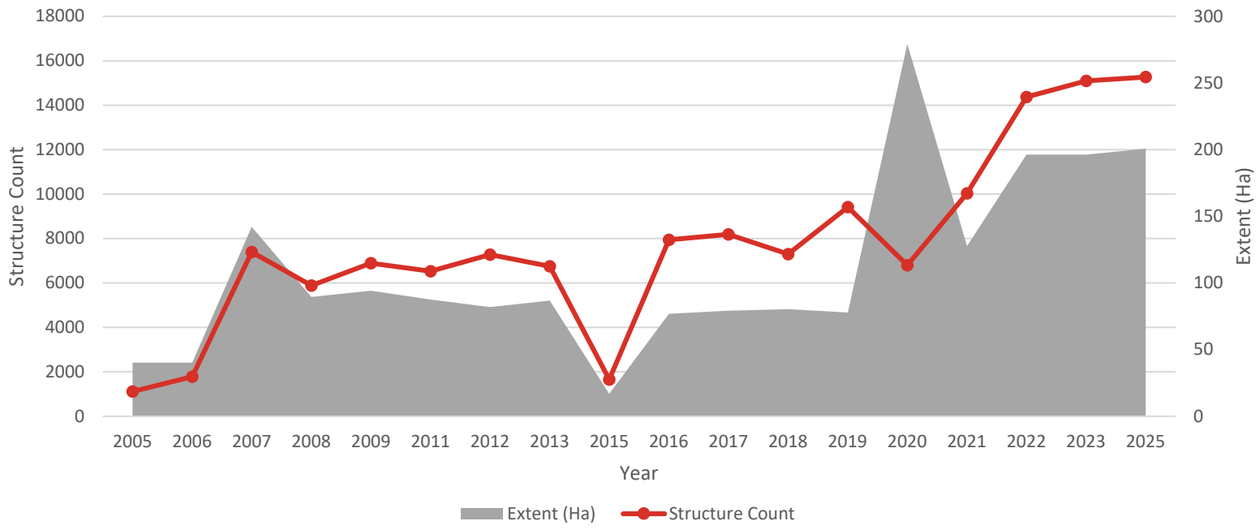
Areas of informality in the Tygerberg District occur predominantly on land that is unsuitable or unsafe for residential development, including core biodiversity areas, airport noise contours around Cape Town International Airport, landfill sites, wetlands and servitudes. Some of these areas are also identified in the District Plan for alternative land uses, including industrial and other employment-generating uses.

LOCAL LEVEL TRENDS

The section below highlights areas where informality has been observed. Most of these settlements have existed for some time, with relocation generally dependent on the implementation of subsidised human settlement projects.

Graph D2-a indicates significant increases in the number of informal structures since the COVID-19 period.

1. Malawi Camp: Partial relocation to Symphony Way. The site is designated as an NDA for employment-generating uses, including services, industrial, commercial, warehousing and office development.
2. Freedom Park: Partial relocation to Symphony Way.
3. Blikkiesdorp: Partial formalisation is planned in relation to Symphony Way. The area is identified in the 2023 District Plan as an NDA for industrial and residential development associated with the ACSA development.
4. Delft South/R300: Unlawful occupation has occurred on environmentally sensitive land.
5. Agste Laan informal settlement.



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

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a Helderberg: Varying location, extent and density of areas of informality (2002 to 2025)

DISTRICT LEVEL ANALYSIS

HELDERBERG DISTRICT (E)



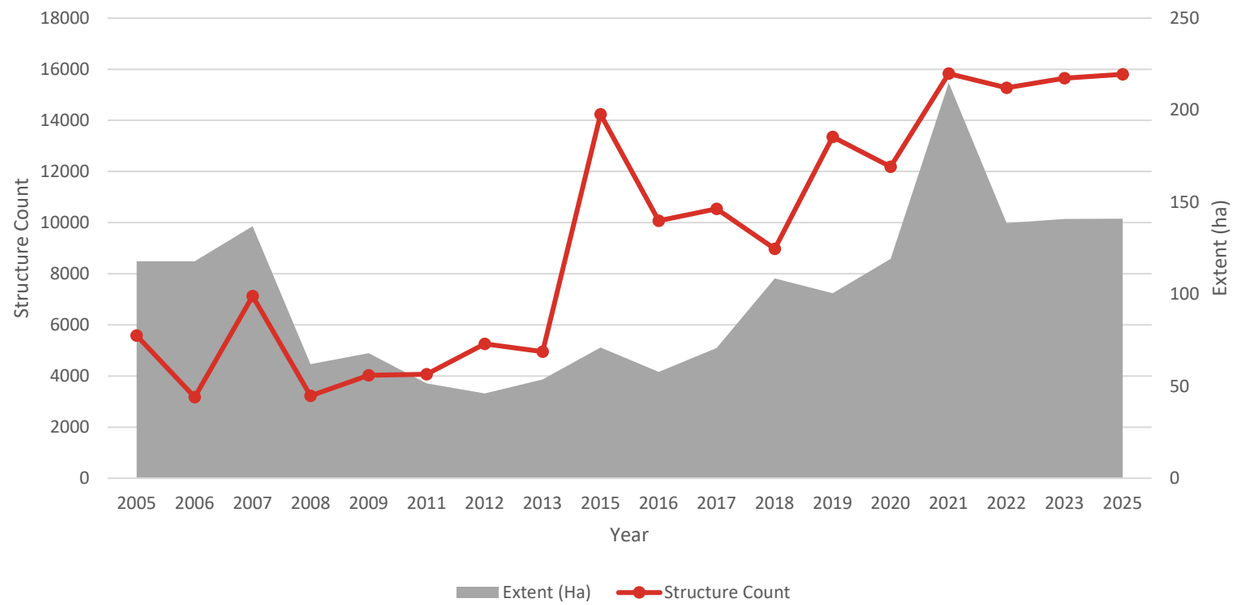
SPATIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality display a clustered spatial pattern, typically embedded within or located close to lower-income areas, with larger concentrations occurring along major transport corridors. Within the Helderberg District, areas of informality are concentrated in Lwandle and Nomzamo, along the N2. In 2015, there appears to have been a significant increase in the number of informal structures relative to the extent of land occupied. Following the COVID-19 period, the number of structures appears to have stabilised compared with the substantial increase recorded in 2015..

LOCAL LEVEL TRENDS

The main areas showing a clear increase in informal structures are Macassar, Sir Lowry's Pass, Lwandle and Nomzamo, where the number of structures continues to grow.

1. Lwandle and Nomzamo: Informal settlements within the N2 alignment corridor are planned for relocation to the proposed Vlakteplaas development and NDA 3 (see D1b).
2. Sir Lowry's Pass: Relocation of the informal settlement to NDA 3, Farm 845, is planned (see D1b).
3. Macassar: Relocation is planned to sites in close proximity to NDAs 3 and 5, for which layout plans have been approved (see D1b). A further informal settlement, known as Deep Freeze, has been identified along Macassar Road.



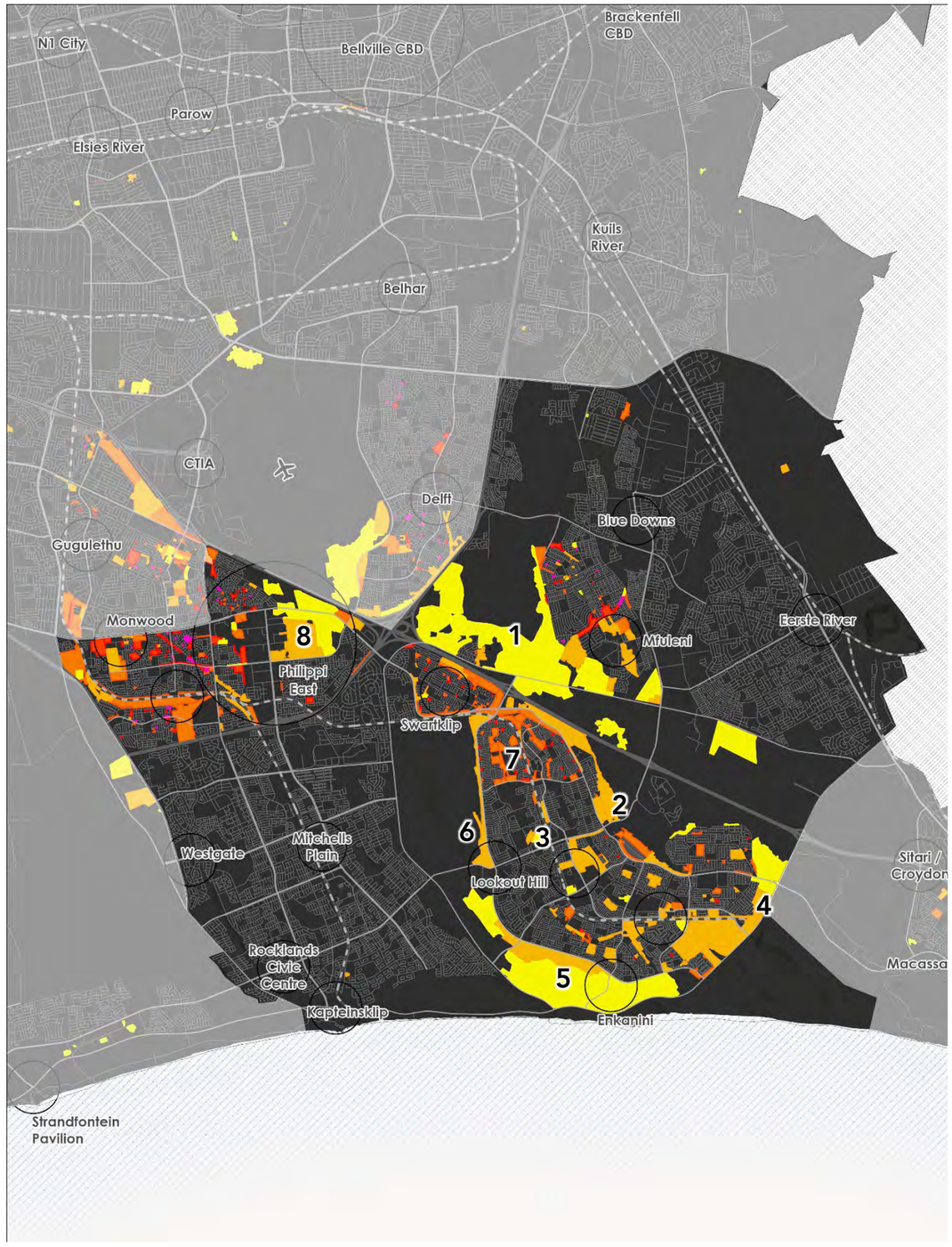
Graph D2-a Helderberg: Number of informal structures per year, excluding areas of unlawful land occupation

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a KMPGBD: Varying location, extent and density of areas of informality (2002 to 2025)

DISTRICT LEVEL ANALYSIS

KMPGBD DISTRICT (F)

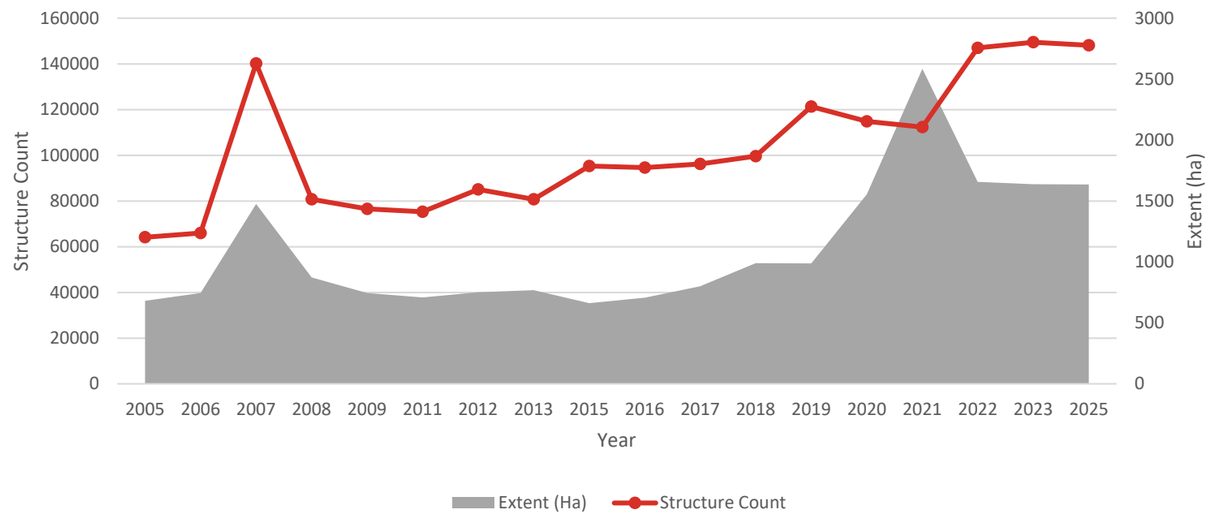


LOCAL LEVEL TRENDS

The 2002 to 2025 data indicate that informality remains concentrated in Philippi East, Driftsands, Mfuleni and Khayelitsha, with varying settlement densities and extents.

The graph shows an overall increase in recorded informal structures over this period, while the recorded extent of informal settlement declines slightly between 2023 and 2025. The figures exclude areas classified as unlawful land occupation.

1. Driftsands: Extensive informality occurs between Delft and Mfuleni, including wetlands and flood-risk areas. These constraints limit conventional residential development and require consideration of upgrading or alternative accommodation.
2. Spine Road and military land: Informality occurs along the Spine Road corridor and adjoining land. Responses should protect land required for infrastructure, environmental management and future development.
3. Lookout Hill and central Khayelitsha: Informal settlements occur within established neighbourhoods. Upgrading should consider infrastructure capacity and access to community facilities.
4. Baden Powell Drive corridor: Informality extends towards eastern Khayelitsha, where flood risk, environmental sensitivities and infrastructure requirements constrain future interventions.
5. Monwabisi and southern coastal edge: Extensive informality occurs along southern Khayelitsha. Coastal and environmental risks, together with infrastructure availability, influence upgrading potential.
6. Swartklip edge: Informality occurs along the northern Khayelitsha interface. Interventions should align with future land development and infrastructure planning.
7. Site C and surrounds: Established informal settlements occur in northern Khayelitsha. Upgrading should consider infrastructure capacity, environmental constraints and access to services.
8. Philippi East and surrounds: Significant concentrations occur near established residential and employment areas, requiring coordinated upgrading, infrastructure investment and protection of land for economic activity.



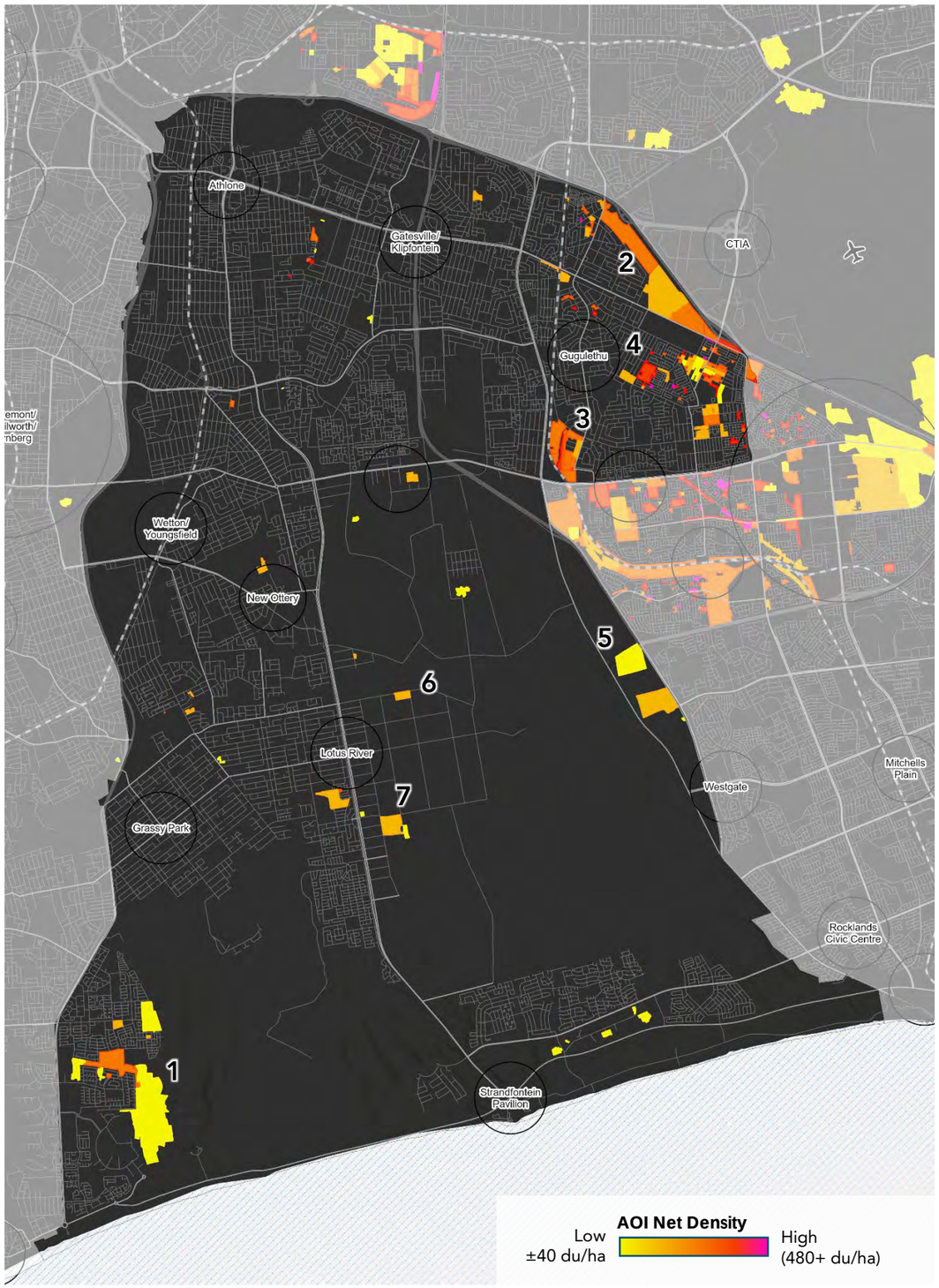
Graph D2-a KMPGBD: Number of informal structures per year, excluding areas of unlawful land occupation

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

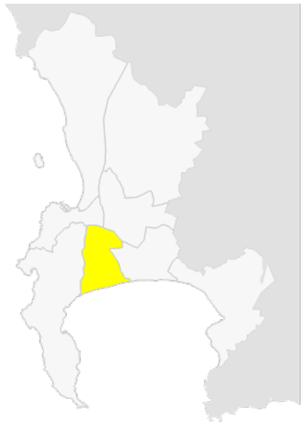
Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a Cape Flats: Varying location, extent and density of areas of informality (2002 to 2025)

DISTRICT LEVEL ANALYSIS

CAPE FLATS (G)



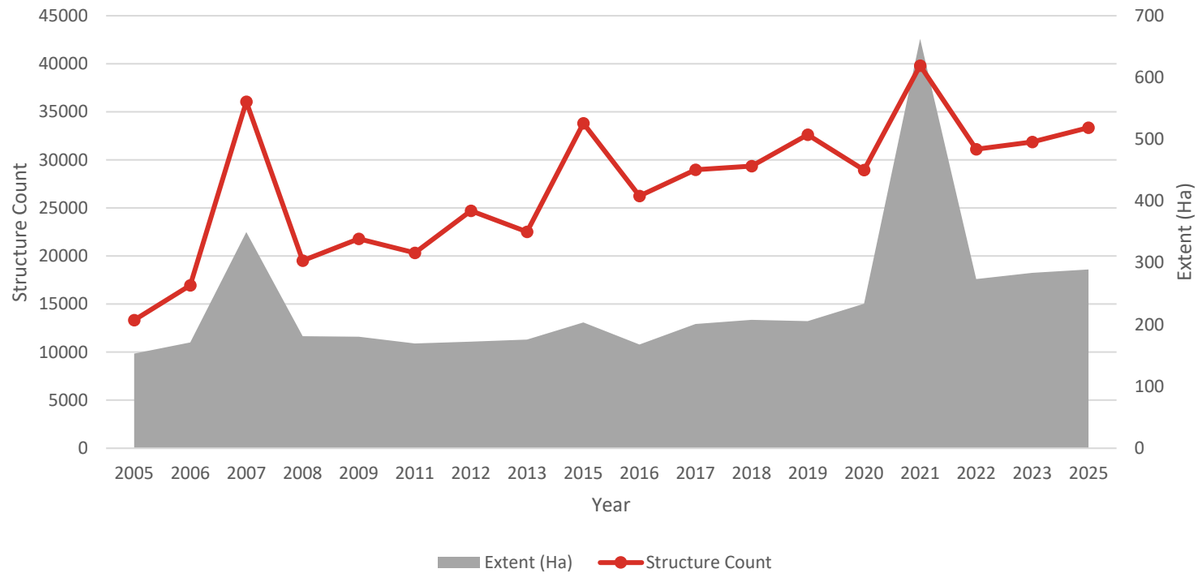
SPATIAL TREND (DISTRIBUTION/PATTERN)

Areas of informality cluster within or adjacent to lower-income areas, with the largest concentrations along the N2 edge of Gugulethu and Nyanga and, since 2020, east of Vrygrond and Lavender Hill. Informal structures increased from approximately 13 000 in 2005 to 33 000 in 2025. The extent of informality remained relatively stable at around 200 ha until 2020, before increasing to approximately 650 ha in 2021 during the COVID-19 lockdown period. It has since declined but remains above pre-2020 levels. The decline in average density in 2021 indicates that newly occupied land was initially settled at relatively low densities.

LOCAL LEVEL TRENDS

Informality is concentrated in Vrygrond and Lavender Hill, the Weltevreden Wedge (Isiqalo), Gugulethu (Fezeka) and Nyanga (KTC). No state-assisted housing has been completed in these areas (see F1), while capital projects are planned for Vrygrond/Lavender Hill, Fezeka, Hanover Park, Nyanga and Pelikan Park.

[1] The greatest change is the occupation of the western part of the False Bay landfill buffer, following the eastward expansion of Vrygrond and Lavender Hill during the COVID-19 period (2020 to 2022). This relatively low-density settlement conflicts with the landfill buffer designation, where residential development is not supported. In [2] Nyanga (KTC), [3] Fezeka in Gugulethu and [4] the informal area near Phakama Community Centre, informality occupies pockets of land within formal residential areas close to nodes and corridors, at some of the highest densities in the district. [5] Isiqalo, in the Weltevreden Wedge, continues to grow and expand onto the land parcel to the north, which is not earmarked for residential development. In [6] and [7] Schaapkraal, the Egoli and Jim se Bos informal settlements have increased in extent and density on smallholdings within an area transitioning to urban uses.



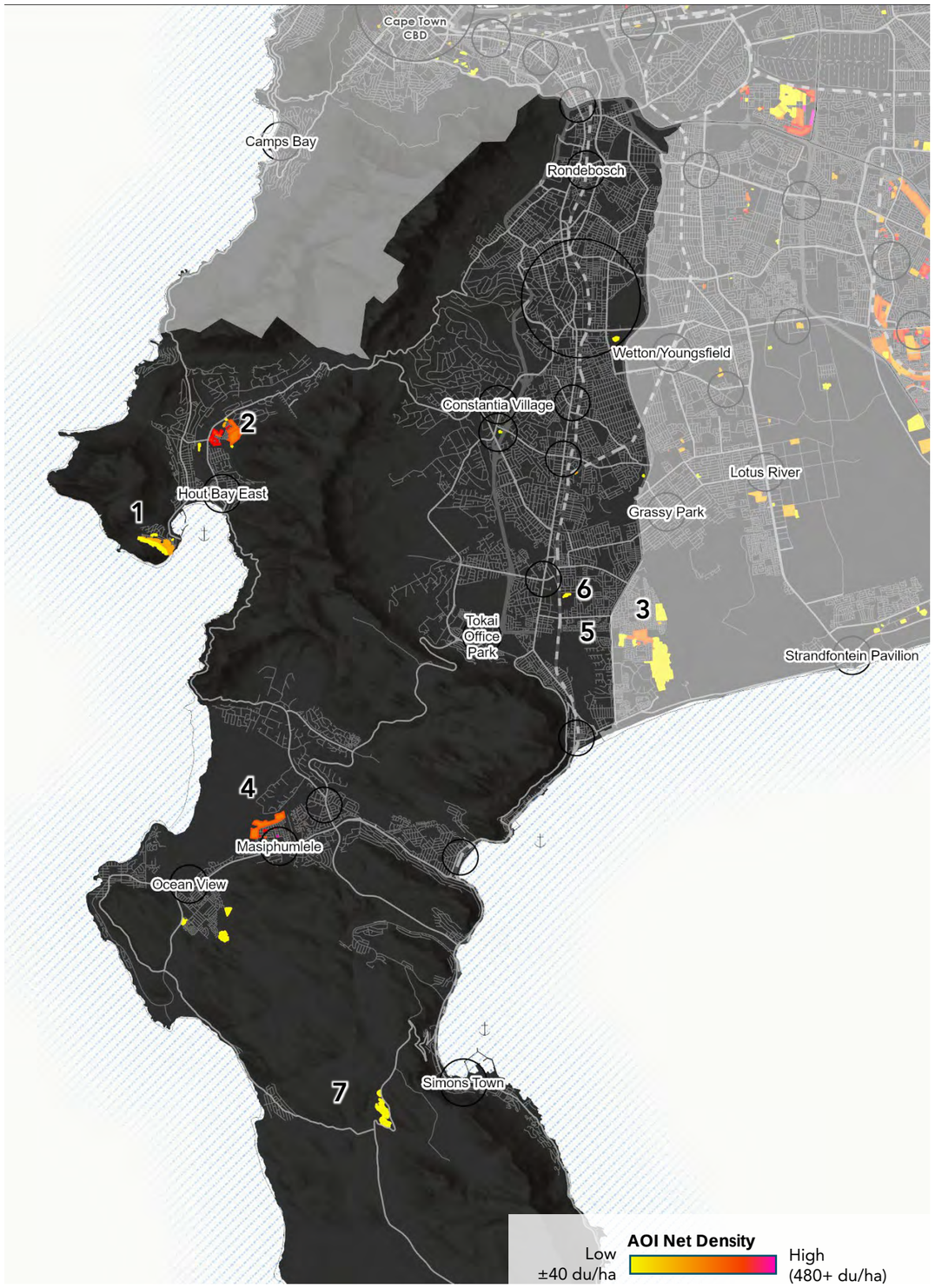
Graph D2-a Cape Flats: Number of informal structures per year, excluding areas of unlawful land occupation

LAND AND BUILDING DEVELOPMENT

AREAS OF INFORMALITY (DISTRICT)

This indicator shows changes in the location and scale (extent, AOI net density and number of structures) of areas of informality over time (2005 to 2025).

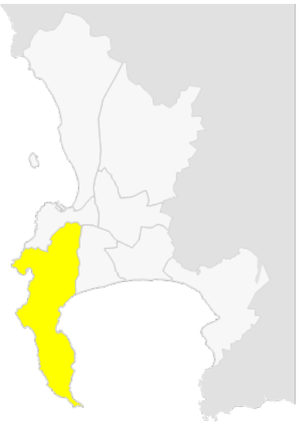
Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2005 to 2025)



Map D2-a Southern: Varying location, extent and density of areas of informality (2002 to 2025)

DISTRICT LEVEL ANALYSIS

SOUTHERN DISTRICT (H)



SPATIAL TREND (DISTRIBUTION/PATTERN)

- Informal settlements are predominantly clustered within or adjacent to lower-income communities.
- Larger concentrations occur in peripheral valley enclaves adjoining natural areas at the urban edge, where opportunities for expansion exist and urban management to contain further growth is challenging.
- Because relatively few lower-income urban areas are located adjacent to the urban edge, those where opportunities for informal expansion exist experience sustained development pressure.

KEY TREND

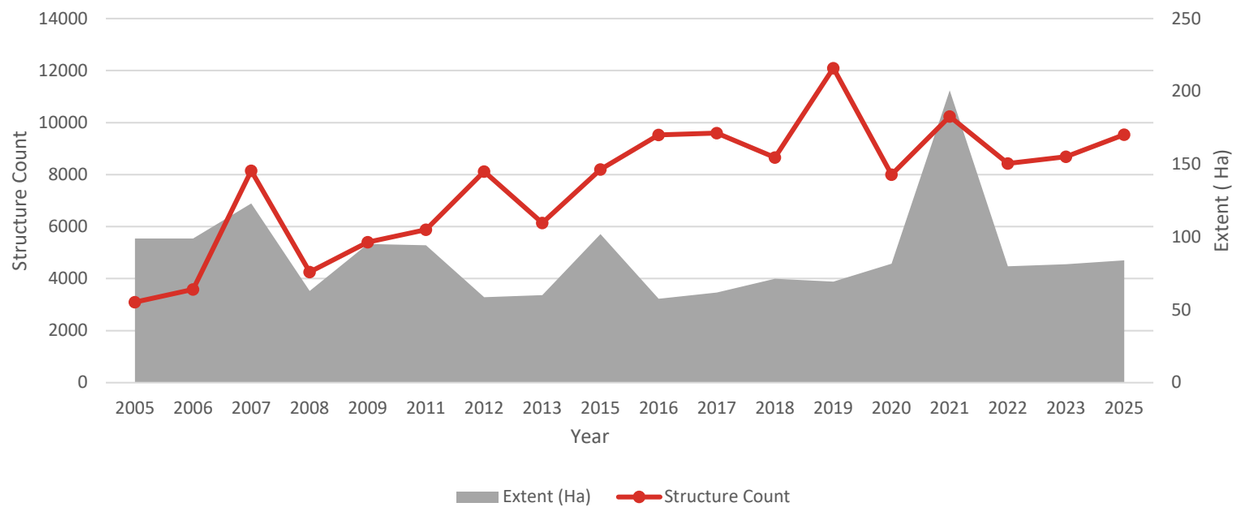
- Ongoing densification within existing informal settlements in the lowest-income areas, particularly Masiphumelele and, to a lesser extent, Imizamo Yethu, has resulted in some of the highest residential densities in the district.
- In other lower income areas, with the exception of Hangberg, growth remains largely contained within established formal areas but continues through the gradual increase in structures.

IMPLICATIONS

- Increasing pressure on infrastructure and service capacity.
- Environmental degradation and declining urban living conditions.
- Coordinated intervention and support from responsible authorities are required to manage growth and improve resilience, particularly where informal settlements abut the urban edge or extend beyond it into adjacent natural areas.

Major Areas of Informality:

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

AREAS OF INFORMALITY

KEY TAKE-AWAY TRENDS:

- **The scale of informal settlement growth has increased substantially since 2016.** Informal structures increased by approximately **67%**, from **169 330 to 283 379**, while the mapped AOI footprint expanded by roughly **1 900 ha**, from about **1 200 ha to more than 3 100 ha**. This highlights the sustained increase in both informal structures and the amount of land under informal occupation.

- **Informal settlement growth remains concentrated in the metro southeast and along major transport corridors**, including the N2, N1, N7 and key rail corridors, reflecting the spatial relationship between accessibility, economic opportunities and informal settlement growth.

- **Growth occurs through both outward expansion and increasing AOI net density**, with many established AOIs becoming progressively consolidated and spatially constrained, particularly in already urbanised areas.

- **AOI net density change is dynamic and non-linear.** Newly occupied and lower-density AOIs generally have low initial densities before consolidating over time. High AOI net densities therefore emerge progressively rather than immediately following occupation.

- **Informal settlement growth is spatially uneven and increasingly constrained.** Newer and lower-density AOIs generally occur on the metropolitan periphery, while established areas such as Khayelitsha, Philippi, Delft, Dunoon and Mitchells Plain continue to intensify within limited available land.

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

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

E : CASE STUDIES

E1 : Historic AOI growth and density change (2026 New Panel)

CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

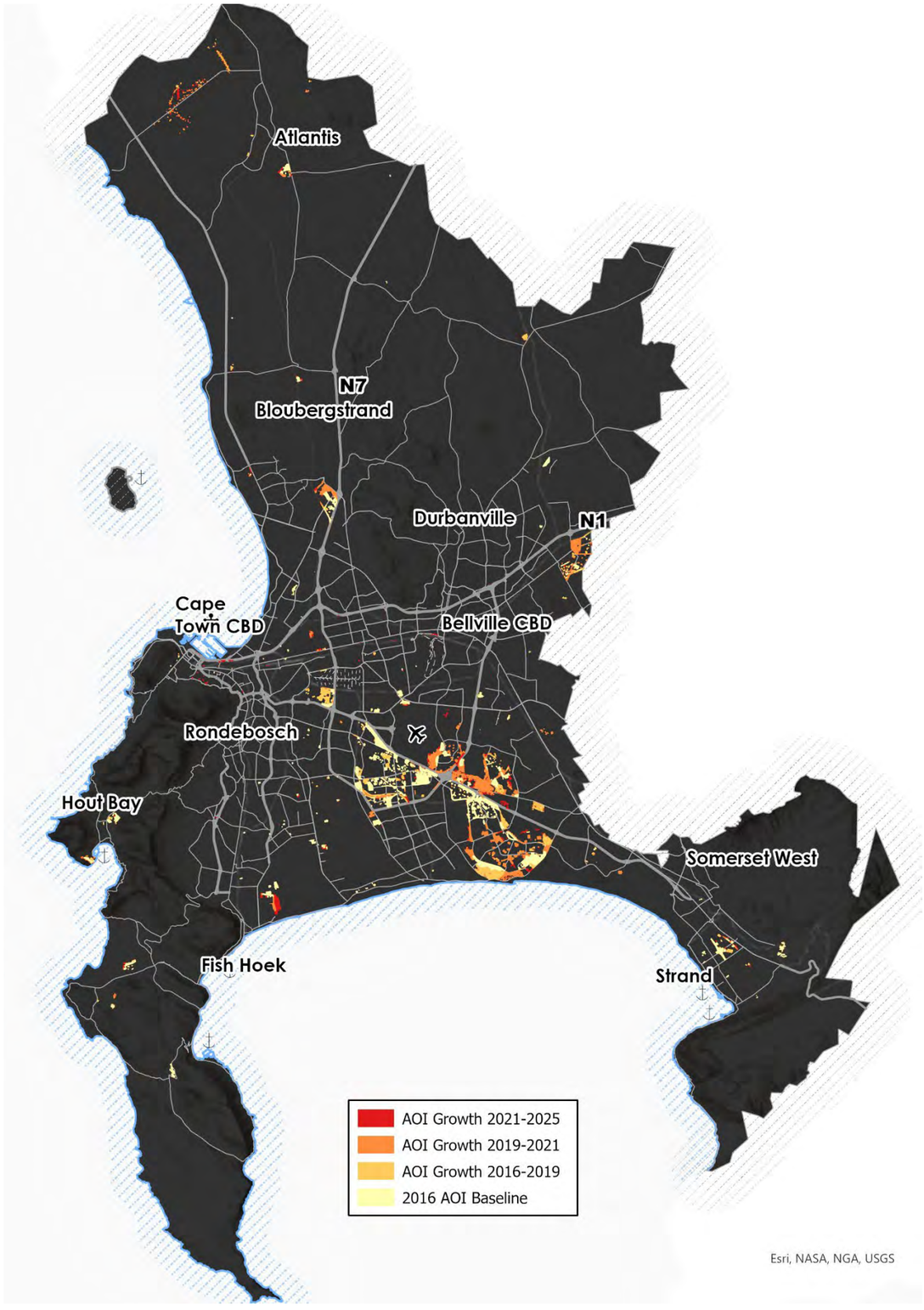
E.1

CASE STUDY

HISTORIC AOI GROWTH AND DENSITY CHANGE

This case study examines historic AOI growth and density change to understand how informal settlements expand, consolidate and densify over time.

Data Source: Human Settlements and Urban Planning and Design, City of Cape Town (2016-2023; spatial data update to 2025)



Map E1-a: AOI Spatial Growth: 2016 Baseline, 2016–2019, 2019–2021 and 2021–2025

PURPOSE

The historic AOI growth and density analysis was undertaken as an input to the 2050 Land Use Model (LUM) to better understand how informal settlements expand and densify over time. The objective was to move beyond a simple assumption that informal settlements progressively "fill to capacity" and instead identify empirically observed patterns of spatial expansion, consolidation and density change. The original analysis examined AOI change between 2016 and 2023. Map E1-a shows AOI spatial growth from the 2016 baseline to 2025 across three distinct growth periods and has been updated to incorporate the latest 2025 AOI dataset.

APPROACH

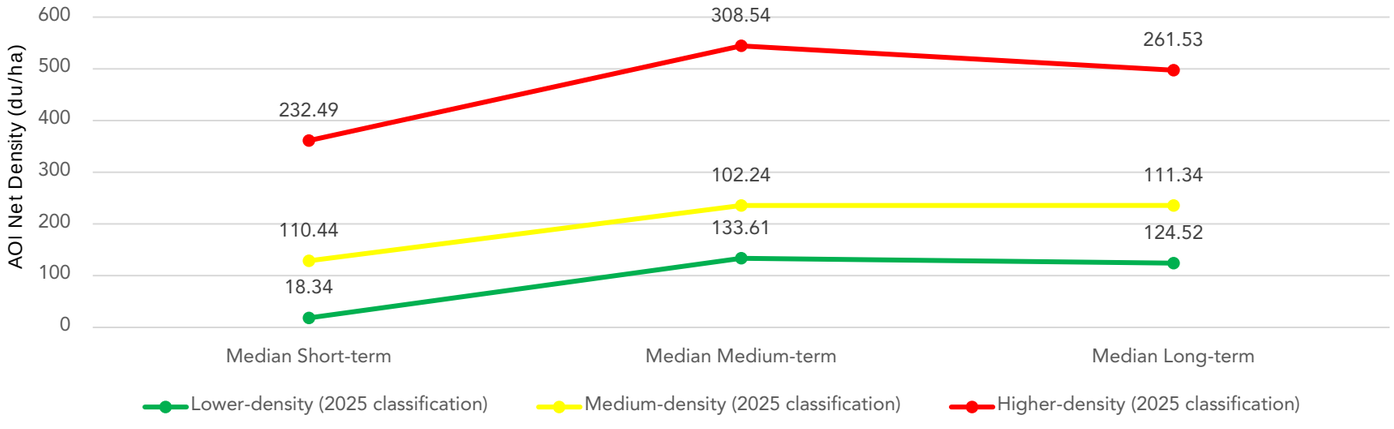
Historic AOI extents and structure counts were compared over time to examine changes in both settlement footprint and AOI net density. The density analysis focused on AOIs originating through informal occupation, as these were considered most representative of potential future AOI formation. Observed density trajectories were grouped into low-, medium- and high-density categories and assessed across short-, medium- and longer-term phases.

WHAT DID THE ANALYSIS FIND?

AOI growth is non-linear and episodic. Spatial expansion and densification do not necessarily occur simultaneously. Newly occupied areas generally start at relatively low densities and densify progressively as structures are added and settlements consolidate. Graph E1-a illustrates these different density trajectories over time. Low-density AOIs generally densify as they consolidate, while medium- and high-density AOIs show more rapid densification followed by stabilisation or moderation. Higher-density outcomes therefore tend to emerge progressively rather than immediately following occupation. The historic analysis also identified a particularly strong expansion phase around 2019–2020, followed by increasing infill and consolidation from 2021 onwards.

HOW WERE THE RESULTS USED?

The findings, including the density trajectories illustrated in graph E1-a, were used to develop time-phased density assumptions for the LUM's future AOI modelling. Rather than applying a single deterministic end-state density, the model uses empirically derived density ranges reflecting different stages of settlement formation and consolidation. This allows future informal growth to be modelled as a probabilistic and time-phased process, recognising that both the location and achievable density of future AOIs vary spatially and over time.



Graph E1-a: AOI net density categories over time

CASE STUDY

HISTORIC AOI GROWTH AND DENSITY CHANGE

KEY TAKE-AWAY TRENDS:

- **AOI growth is non-linear and occurs through different phases.** Outward expansion and densification do not necessarily occur simultaneously; newly occupied land generally starts at lower densities and consolidates progressively over time.
- **Density generally increases as settlements consolidate, but does not increase indefinitely.** Higher-density outcomes emerge through phased occupation, with rapid densification often occurring during the consolidation phase before stabilising or moderating as settlements mature.
- **Historic growth patterns provided an empirical basis for future AOI modelling.** The LUM uses time-phased density assumptions and probabilistic spatial allocation rather than assuming that all AOIs develop uniformly towards a single predetermined density.

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
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STAD KAAPSTAD

F : PUBLIC INVESTMENT

F1 : Government subsidised housing (2026 Update)
F2 : Capital expenditure / budgets (2026 Update)
F3 : Urban restructuring and upgrading (2026 Update)
F4 : Prioritise LAPIs (2026 Update)

CITY OF CAPE TOWN
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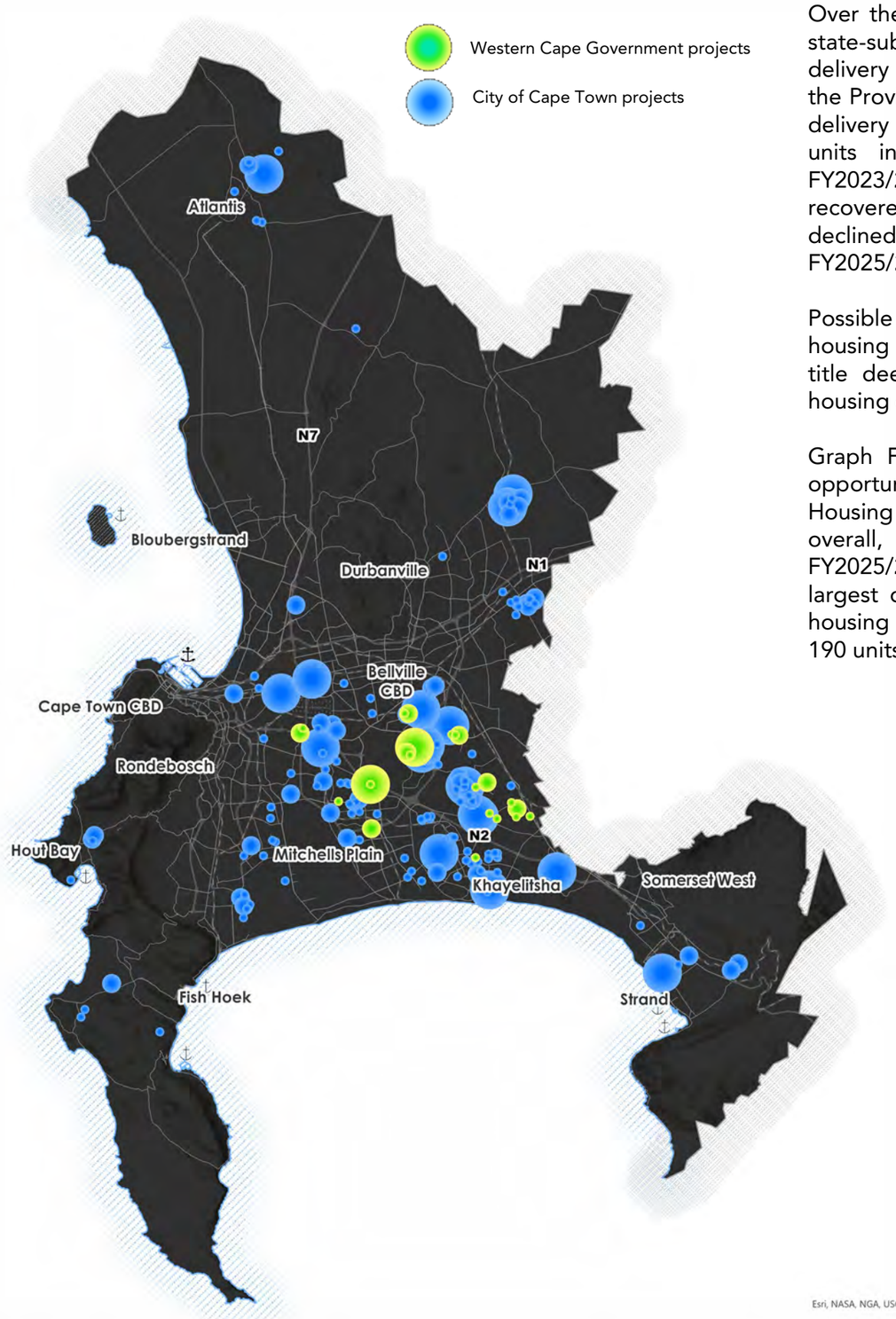
F.1

PUBLIC INVESTMENT

GOVERNMENT-SUBSIDISED HOUSING

This indicator reflects the delivery of government-subsidised housing (completed housing) over a 10-year period, from FY2016/17 to FY2025/26, as reported by the City of Cape Town and the Western Cape Department of Infrastructure: Branch Human Settlements.

Data Source: WCG&CCT Human Settlements Projects (2016/17 to 2025/26)



Map F1-a: Government-assisted housing completed (2016/17 to 2025/26)
Source: City of Cape Town and Provincial Departments of Human Settlements

OVERALL TREND

Over the past decade, the City consistently delivered more state-subsidised residential units than the Province. City delivery peaked at 5 810 units in FY2016/17, compared with the Province's peak of 2 818 units in the same year. Although delivery declined overall, City output increased from 2 013 units in FY2021/22 to approximately 4 000 units in FY2023/24, declined to 2 405 units in FY2024/25, and recovered to 4 468 units in FY2025/26. Provincial delivery declined from 945 units in FY2021/22 to 53 units in FY2025/26.

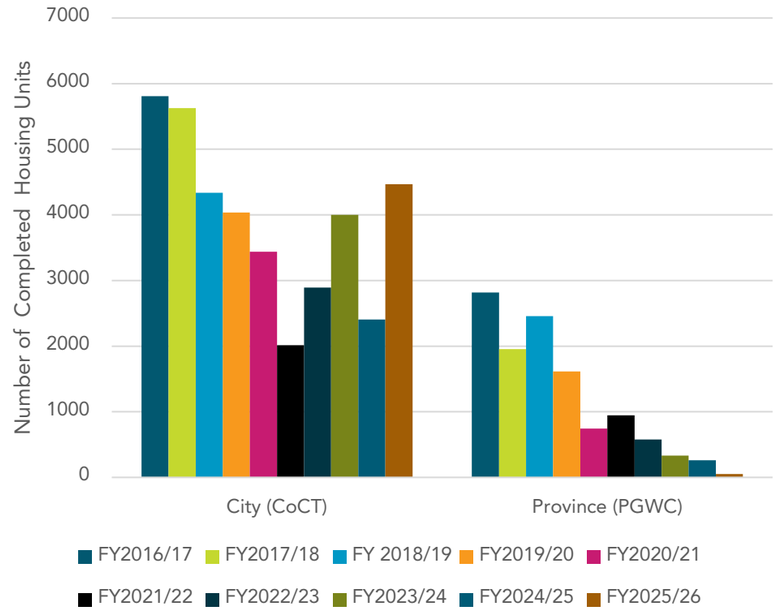
Possible contributing factors include reduced subsidised housing grant funding, infrastructure constraints, delays in title deed transfers and a policy shift towards affordable housing delivery mechanisms.

Graph F1-b shows the proportions and types of housing opportunities delivered over the past decade. Formal State Housing (BNG) remained the dominant delivery mechanism overall, although its contribution declined over time. In FY2025/26, Informal Settlements Upgrading became the largest delivery typology, contributing approximately 2 300 housing opportunities, followed by Formal State Housing (1 190 units) and Social Housing (999 units).

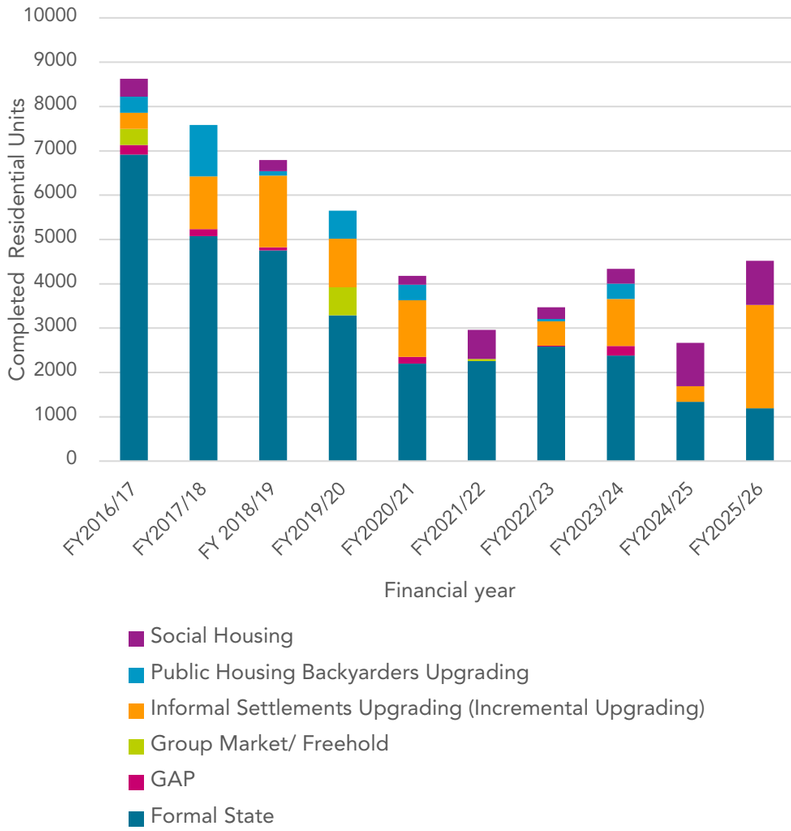
SPATIAL TREND (PATTERN/DISTRIBUTION)

Map F1-a shows the cumulative concentration and relative scale of human settlements projects delivered over the past decade, combining sites and top structures as residential opportunities. Most projects are concentrated in the metro southeast, close to areas of highest residential density. This contrasts with privately delivered multi-residential development, which is generally located towards the northeastern and northwestern parts of the built-up footprint.

Most projects fall within Urban Support Areas identified in the district spatial plans and Prioritised Human Settlements Development Areas, including the Metro South-East Corridor and Blue Downs Corridor. Provincial initiatives are concentrated in Delft, Belhar and parts of Wallacedene/Bloekombos, while major City 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

PUBLIC INVESTMENT

GOVERNMENT-SUBSIDISED HOUSING

This indicator reflects the delivery of government-subsidised housing (completed housing) over a 10-year period, from FY2016/17 to FY2025/26, as reported by the City of Cape Town and the Western Cape Department of Infrastructure: Branch Human Settlements.

Data Source: WCG&CCT Human Settlements Projects (2016/17 to 2025/26)

KEY TAKE-AWAY TRENDS:

- **City delivery has fluctuated but remains the dominant contributor:** City delivery declined substantially from its earlier peak, before recovering to 4 468 units in FY2025/26 following a decline to 2 405 units in FY2024/25.
- **Provincial delivery has declined substantially:** Provincial delivery has reduced over the recent period, reaching 53 units in FY2025/26, indicating increasingly constrained delivery.
- **The housing delivery profile is changing:** Formal State Housing (BNG) remains the dominant delivery mechanism over the longer term, but its share has declined as Social Housing and Informal Settlements Upgrading have become more prominent. In FY2025/26, Informal Settlements Upgrading represented the largest delivery typology.
- **Government-subsidised residential opportunities remain spatially concentrated in high-density areas**, particularly within Urban Support Areas and Prioritised Human Settlements Development Areas identified in the District Plans.

Map F1-a: Government-assisted housing completed (2016/17 to 2025/26)
Source: City of Cape Town and Provincial Departments of Human Settlements

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

Graph F1-b: Types of housing opportunities completed

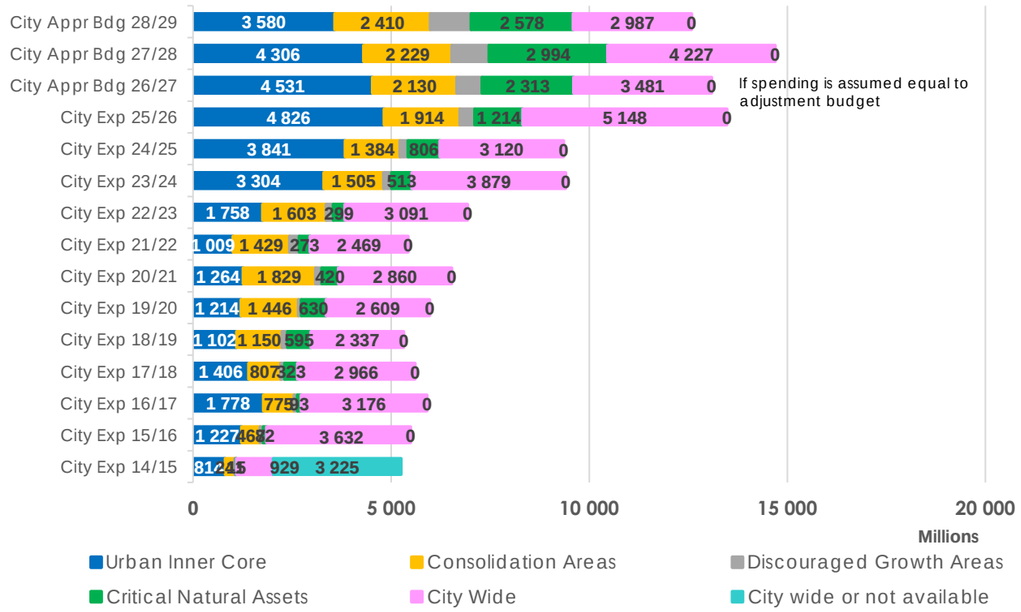
F.2

PUBLIC INVESTMENT

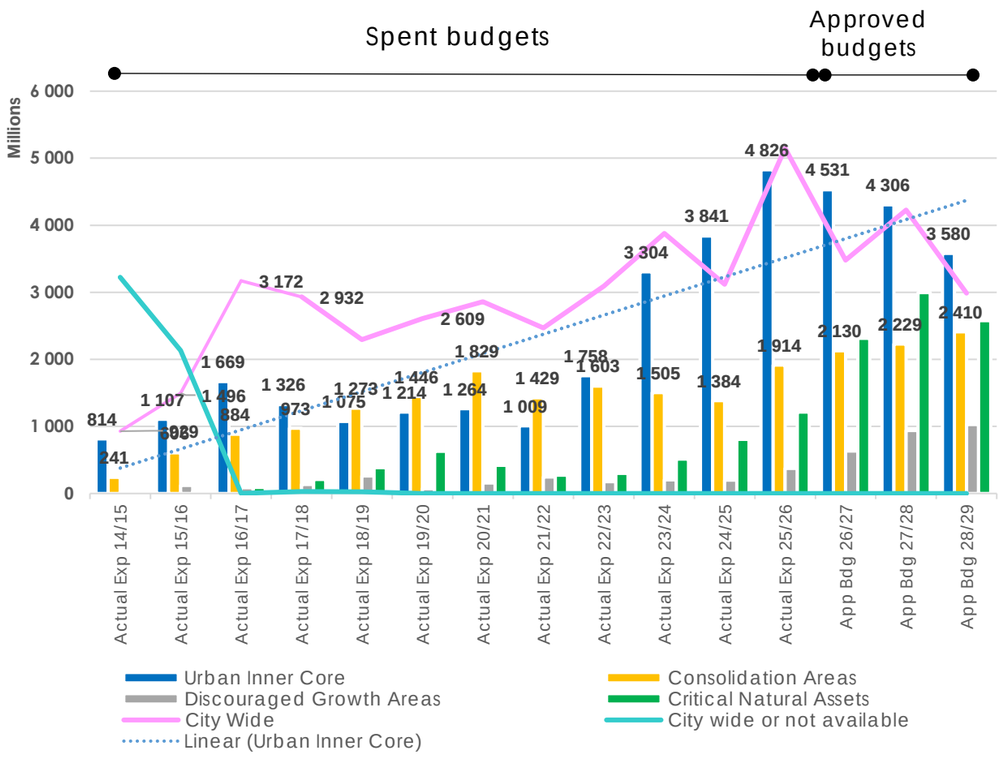
CAPITAL EXPENDITURE: CITY PROJECTS

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.

Data Source: City of Cape Town Finance Dept (June 2026)



Graph F2-a: City of Cape Town capital expenditure 2014/15 to 2025/26 (as at Jun 2026) per MSDF Spatial Transformation Area (>2026/27 estimated as equal to budget)



Graph F2-b: City Capital expenditure 2014/15 to 2025/26 and approved budgets 2026/27 to 2028/29 (as at Jun 2026)

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 expenditure on capital projects, from around R5b in 2014/15 to over R14b in 2025/26–2028/29 (see graph F2-a). It is estimated that expenditure will increase to just under R15b in June 2027.

Spatial mapping of the precise location of capital expenditure in the C3PM system commenced in 2015 (refer to the next page). The largest group of projects is still classified as those benefiting the Cape Town municipal area at large (indicated as citywide benefits in graphs F2-a and F2-b), but the UIC is exceeding these from 2025/26 onwards, implying spatial policy realisation. Citywide includes projects such as water pipe and meter replacements; sewer pump station upgrades and pipe replacements; road upgrades; informal settlement upgrades, including sanitation; vehicle replacements; and technology improvements (IT, safety and security systems, disaster risk management, etc.). These citywide locations grew from just over R1b in 2014/15 to an estimated fourfold total of R4,2b in 2027/28.

Projects with clear locations in the UIC rapidly increased due to system correction and spatial targeting, increasing from less than R1b in 2014/15 to almost R4,8b 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 the upgrading of existing infrastructure. Capital expenditure in the CNA was not clearly visible in 2014/15, but is estimated to increase significantly to more than R2,3b in the current financial year (see graph F2-a). Many of these projects are bulk water infrastructure projects that traverse certain CNA areas and hence pick up that location..

SPATIAL TREND (DISTRIBUTION/ PATTERN)

Projects located in the UIC and the CA aim to provide improved services to the areas where the majority of citizens are currently residing (refer to panel C3). These areas are also the intended focus of 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 UIC (see graph F2-b) – the area of highest anticipated residential densification over the next 10–25 years. However, the recent approval of incremental densification referred to affordable rental flats, and its full impact on the long-term infrastructure budget planning of the capital programmes should still be filtered into long-term infrastructure planning and is hence not yet visible, even though expenditure in the UIC is the highest ever in the City's records, with a significant step change in 2022/23.

The budget increase in the UIC and the CA can be ascribed to investment in large bulk engineering service improvements, such as 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 the security of nature reserves, biodiversity improvements and environmental protection. On average, about 50% of the City's historical capital budget expenditure was depicted as citywide, but this is gradually decreasing as more project locations are confirmed.

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 illustrates the focus on alignment with the MSDF and the location of large, very costly infrastructure projects such as Bus Rapid Transit and the upgrading of wastewater treatment works.

The UIC trend line, reflecting capital expenditure and anticipated spending in the UIC (with approved budgets from 2026/27 onwards), is substantially steeper from 2023/24 than it has been historically. Annual spending is generally lower than budgeted amounts, but the City is working on expanding programme and supply chain management capacity to ensure that approved budgeted amounts, such as those for 2026/27 and beyond, are spent rather than reduced at the 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.

Data Source: City of Cape Town Finance Dept (June 2026)

OVERALL TREND

Expenditure on capital projects located in or beneficial to the UIC has steadily increased over the years and has averaged around 27% of the value of total annual capital expenditure since 2015/16, although it has been much higher in recent years (35%–41%–36%). The latest completed year (2025/26) appears to be returning to just over one-third and is a true reflection of the spatial targeting focus on the UIC for large infrastructure projects such as wastewater treatment works and IRT Phase 2A.

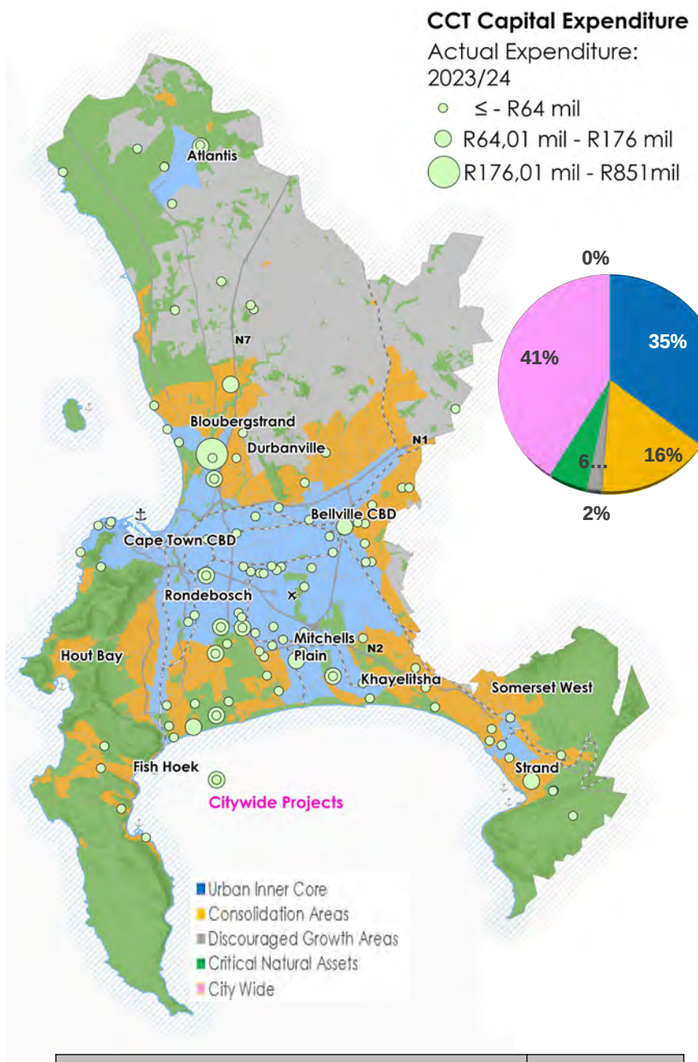
Investment in projects located in or benefiting the CA reached a high of about 28% of annual expenditure in 2020/21. Due to the large investments in the UIC, the CA share for 2022/23 to 2025/26 is slightly smaller.

Expenditure on projects benefiting the whole municipal area and categorised as citywide has more or less remained at about 40% for quite a few years. In the last two years (2025/26 to 2026/27), expenditure is much higher in well-known locations in the UIC, and locations are clear for large projects.

In almost all cases during the past ten 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.

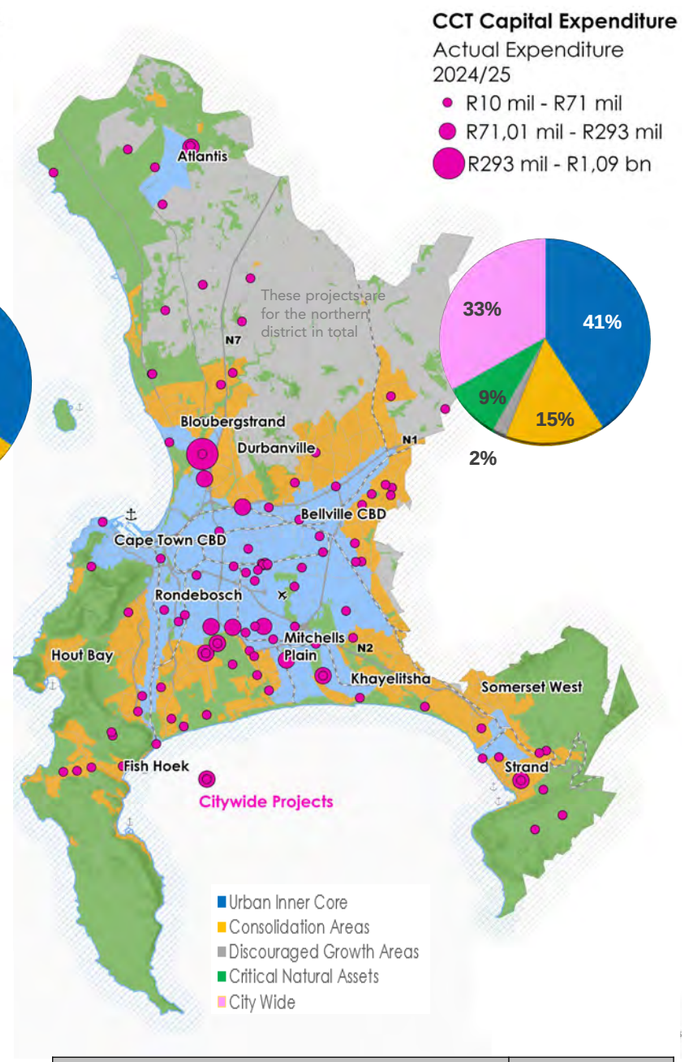
More recently, engineering network projects such as WWTW upgrades, Cape Flats Aquifer Recharge and especially IRT Phase 2A (bus rapid transport road construction) dominated human settlement projects in the top 10 per year. Since 2019/20, wastewater treatment works (WWTS), Sewer Network Replacements, as well as Automated Water Meter Replacement (AMI) upgrade projects, were the most costly expenditure items, closely followed by the Rapid Bus Transport Road investment.

2023/24



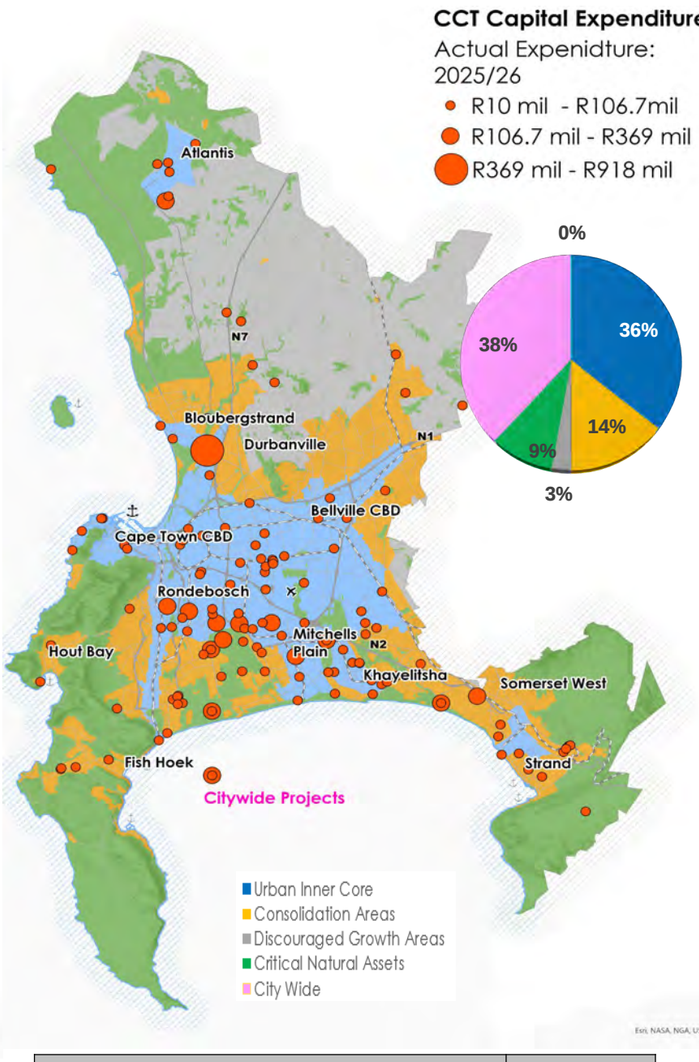
Project Name	Actual Exp
Potsdam WWTW - Extension	851 136 358
IRT Ph2A:Depot Bld Works-Mitchl&Khayelit	176 043 096
Replace Sewer Network (Citywide) FY24	171 829 904
Coastal Park:Design and develop (MRF)	153 387 387
Land Acquisition FY24	152 211 918
Fleet Replacement FY24	147 194 721
Repl & Upgr Sew Pump Station FY24	139 897 098
Athlone WWTW-Capacity Extension-phase 1	129 141 585
Triangle 132kV Upgrade	128 313 576
Replace Water Network (City Wide) FY24	122 443 011

2024/25



Project Name	Actual Exp
Potsdam WWTW - Extension	1 088 824 736
Replace Sewer Network (Citywide) FY25	292 922 638
Replace Water Network (City Wide) FY25	169 063 169
Property Acq: Joint Policing Centre	160 875 451
IRT Ph2A:Depot Bld Works-Mitchl&Khayelit	145 904 068
Repl & Upgr Sew Pump Station FY25	143 961 443
Ground Mounted Photo Voltaic	143 408 283
IRT Ph2A:W4-Roadway-Govan Mbeki	132 844 295
IRT Ph2A:Trunk-E6-AZ Berm Stock-MtchplTC	127 403 649
Vehicles: Replacement FY25	127 077 938

2025/26



Project Name	Actual Exp
Potsdam WWTW - Extension	918 130 345
Macassar WWTW Extension	368 792 525
Replace Sewer Network (Citywide) FY26	335 000 000
IRT Ph2A:Trunk-E2-M9 Dnfntn Rlwy-Intskzi	317 333 922
AMI rollout programme	267 281 000
Cape Flats Aquifer Recharge	260 489 370
Replace Water Network (City Wide) FY26	213 402 748
IRT Ph2A:W4-Roadway-Govan Mbeki	194 351 169
IRT Ph2A:Trunk-E1-M9 Heinz - Dnfntn Rlwy	175 466 027
IRT Ph2A:Trunk-E6-AZ Berm Stock-MtchplTC	167 512 264

Map Series F2-a: City capital expenditure 2023/24, 2024/25 and 2025/26

F.2

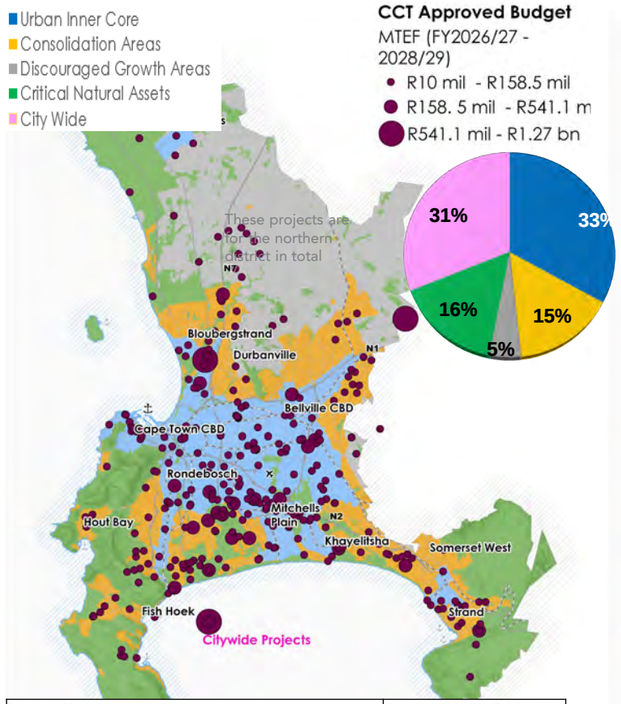
PUBLIC INVESTMENT: CITY & PROVINCIAL GOVERNMENT

CAPITAL BUDGET: CITY & PROVINCIAL PROJECTS

2026 Update

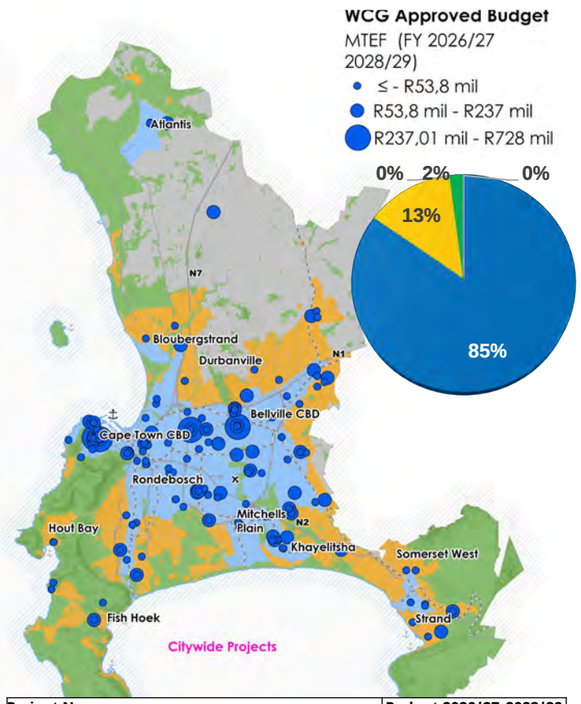
This indicator shows the location of annual completed capital projects by the City of Cape Town (CCT) and the Western Cape Government. It is reflected in the different investment targeted areas in the city, as consolidated in the MSDF (Municipal Spatial Development Framework).

Data Source: City of Cape Town and Western Cape Gov Finance Dept (June 2026)



Project Name	Budget 2026/27-2028/29
Macassar WWTW Extension	1 846 519 847
BWAS:Muldersvlei Reservoir & Pipeline	1 269 125 883
Finance and Operational Core Software	1 088 290 346
Potsdam WWTW - Extension	813 010 246
AMI rollout programme	753 931 184
EPIC - Emergency Police Incident Control	541 065 173
Cape Flats Aquifer:Strandfontein NorthE	518 965 603
Ground mounted Solar PV Project	492 012 417
Rietvlei Pump Station and Rising Main	460 083 249
MyCiti Buses: Additional FY27	435 708 000

Map F2-a: City capital budget 2026/27 to 2028/29



Project Name	Budget 2026/27-2028/29
Scheduled Maintenance	728 633 000
Parow - Tygerberg Hospital - HT - Replacem	665 000 000
Maintenance - RDO Cape Town	656 422 000
Individ Non-Cred Linked Subs	584 007 000
Individ Finance Linked Sub	545 000 000
Operational Maintenance	430 564 000
C1325 PRMG Routine MaintenanceCTM	237 000 000
Cleaning Services	220 921 000
Design Fees Rehabilitation	195 000 000
C1288 Rehab/reseal of Contermanskloof Rd	190 470 000

Map F2-b: Province capital budget 2026/27 to 2028/29

OVERALL TREND

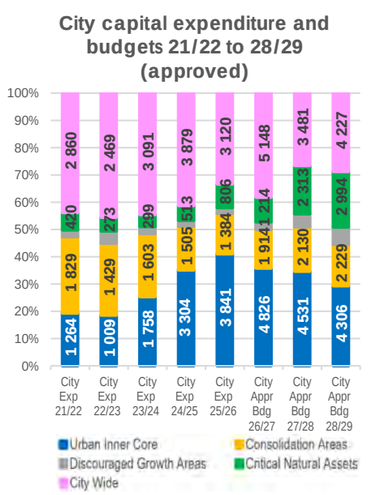
Anticipated and approved budgets for capital projects illustrate intended investment by role players such as the City, as the local authority, and the Provincial Government of the Western Cape. These budgets reflect that government's intended capital project locations align with the spatially targeted areas (STAs) of the City's MSDF. Approved investment by the Local and Provincial Government over the medium term (2021/22 to 2028/29) is increasing (see graph F2-e), with the City spending more than four times what the Provincial Government is spending in the Cape Town metropolitan area.

For the City, the overall budget is increasing from around R7b in 2023/24 to just over R14b in 2028/29, while the provincial budget increases to about R4b or slightly more (see graph F2-c). The proportion intended to be spent by the Province in the UIC and CAs is greater than the City's (see graph F2-a versus graph F2-b: City 44%–50% versus Province 96%–99% of the total annual budget). Maps F2-a and F2-b depict the locations of the City and Provincial Government's approved capital projects for the next three years.

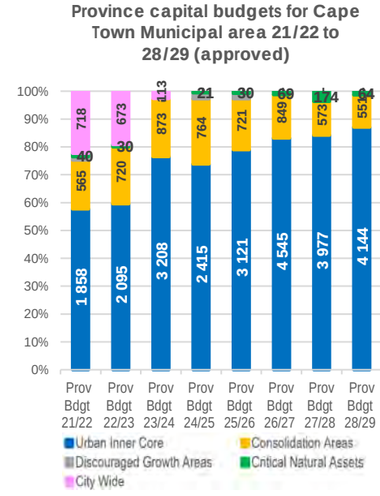
The City's capital budget contains a significantly larger number of projects than that of the Province. The City has more than double the number of large projects (>R10m in 2025/26 to 2028/29) compared with the Province. For projects <R10m over the three-year period, the City has around 12 times more projects than the Province.

Maps F2-a and F2-b indicate the proportion of capital project values for the MTREF period to be spent in each of the STAs.

Some projects are also located in 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-a: City capital budgets 2021/22 to 2028/29



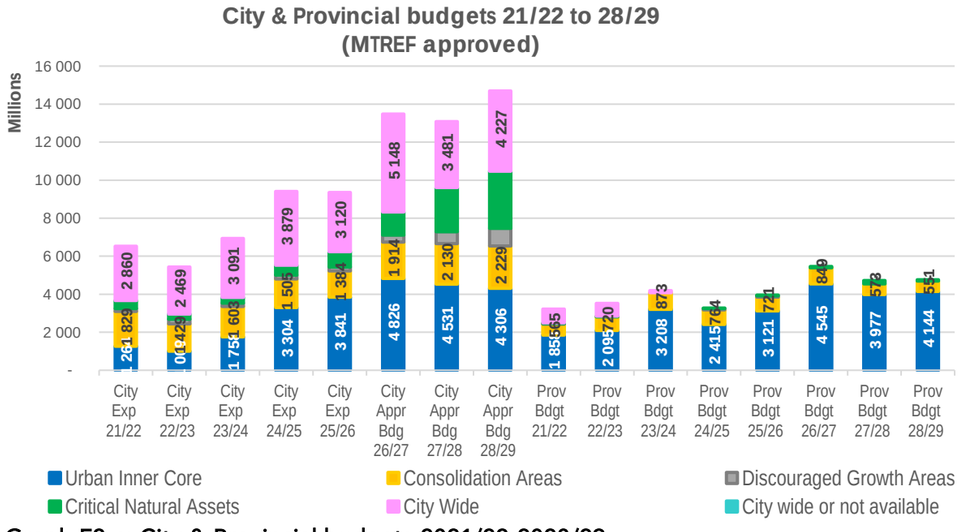
Graph F2-b: Province capital budgets 2021/22 to 2028/29

SPATIAL TREND (DISTRIBUTION/PATTERN)

There is an anticipated increase in potential spending by the City in all of the STAs, especially in the UIC, CA and even the CNAs (see graphs F2-a and F2-c). Projects located in the UIC and the CA reflect a focus on providing improved services to the areas where the majority of citizens are currently located and where further densification is expected and planned. The anticipated increase in the CNAs can be ascribed to the fact that large bulk engineering service network improvements at wastewater treatment works (WWTW), as well as large bulk water pipelines, are mostly located in or surrounded by critical natural areas. Secondly, the City is investing in improving the 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 WWTW upgrades, bulk water pipelines, reservoir upgrades, sewer pump station upgrades, AMI Automatic Water Meter Infrastructure, Financial and Operational Information Technology Software, as well as Solar PV Plants and Emergency Incident Control Technology Systems. The Provincial budget has a strong focus on upgrading the Tygerberg Provincial Hospital and, more specifically, on road maintenance. Around 30% of the City's capital budget is always depicted as citywide (see graph F2-c), which implies that the project benefits are distributed across the whole municipal area and cannot be ascribed only to the UIC, CAs or CNAs.

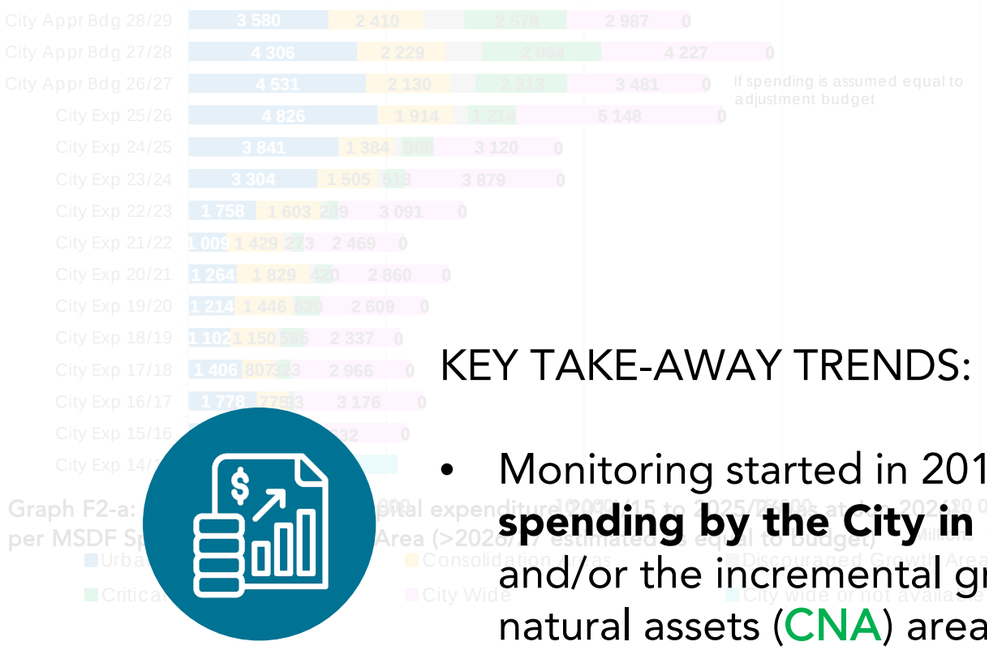
GENERAL ANALYSIS

The maps show a high concentration of projects within the UIC, corresponding with the highest concentrations of residential units, population density and the overall need for further investment to serve the increasing needs of citizens (refer to other indicator sheets). The City, in particular, has a number of projects that provide citywide benefits and do not have specific locations (see dots located in the sea). These projects cover investments planned for the City's full jurisdictional area and include water meter and water pipe replacements; sewer pump station upgrades and sewer pipe replacements; road upgrades; vehicle replacements; informal settlement upgrades, including sanitation; and technology improvements (IT, safety and security systems, disaster risk management, etc.).



Graph F2-c: City & Provincial budgets 2021/22-2028/29

CAPITAL EXPENDITURE: CITY PROJECTS

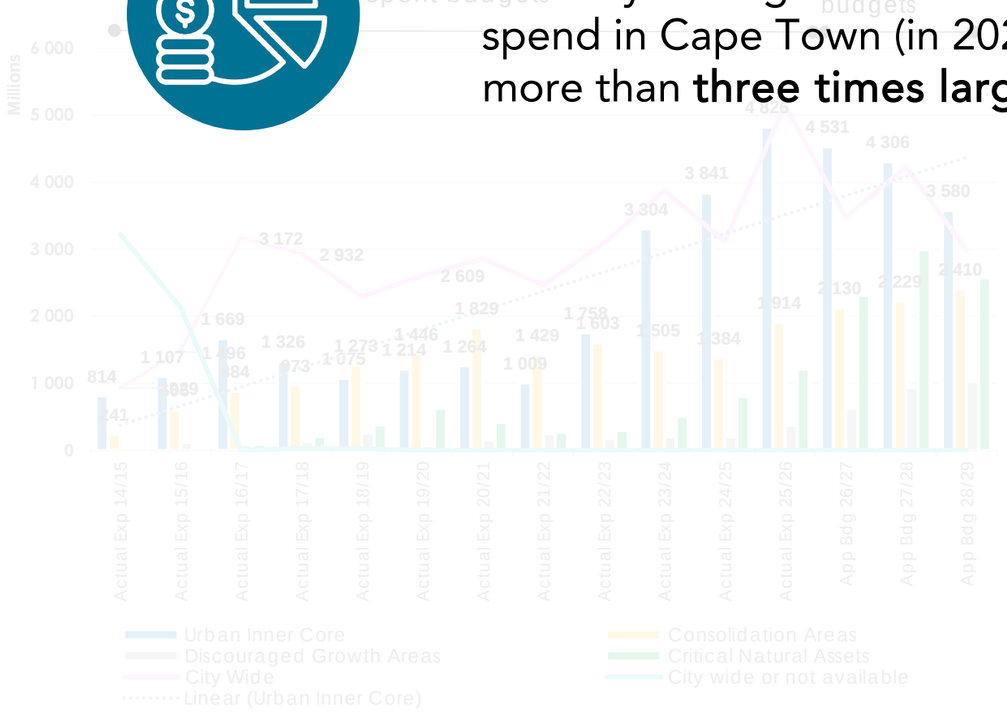


Graph F2-a: Capital expenditure 2014/15 to 2025/26 and approved budgets 2026/27 to 2028/29 per MSDF Spatial Area (>2026/27 estimated spend equal to budget)

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 (CA) 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 (2028/29) have increased to more than **three times larger** than the provincial budget for the municipal area.



Graph F2-b: City Capital expenditure 2014/15 to 2025/26 and approved budgets 2026/27 to 2028/29 (as at Jun 2026)

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 expenditure on capital projects, from around R5b in 2014/15 to over R14b in 2025/26–2028/29 (see graph F2-a). It is estimated that expenditure will increase to just under R15b in June 2027.

Spatial mapping of the precise location of capital expenditure in the C3PM system commenced in 2015 (refer to the next page). The largest group of projects is still classified as those benefiting the Cape Town municipal area at large (indicated as citywide benefits in graphs F2-a and F2-b), but the UIC is exceeding these from 2025/26 onwards, implying spatial policy realisation. Citywide includes projects such as water pipe and meter replacements; sewer pump station upgrades and pipe replacements; road upgrades; informal settlement upgrades, including sanitation; vehicle replacements; and technology improvements (IT, safety and security systems, disaster risk management, etc.). These citywide locations grew from just over R1b in 2014/15 to an estimated fourfold total of R4,2b in 2027/28.

Projects with clear locations in the UIC rapidly increased due to system correction and spatial targeting, increasing from less than R2b in 2014/15 to almost R4,8b 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 [illegible] not clearly visible in 2014/15, but is estimated to increase significantly to more than R2,2b in the current financial year (see graph F2-a). Many of these projects are [illegible] hence pick up that location..

SPATIAL TREND (DISTRIBUTION/ PATTERN)

Projects located in the UIC and the CA aim to provide improved services to the areas where the majority of citizens are currently residing (refer to panel C3). These areas are also the intended focus of the largest component of incremental densification, intensification and diversification of land uses along transport corridors. There is a constant increase in the [illegible] related residential densification over the next 10–25 years. However, the recent approval of incremental densification referred to affordable rental flats, [illegible] programmes should still be filtered [illegible] expenditure in the UIC is the highest ever in the City's records, with a significant step change in 2022/23.

The budget increase in the UIC and the CA can be ascribed to investment in large bulk engineering service improvements, such as 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 the security of nature reserves, biodiversity improvements and environmental protection. On average, about 50% of the City's historical capital budget expenditure was depicted as citywide, but this is gradually decreasing as more project locations are confirmed.

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 illustrates the focus on alignment with the MSDF and the location of large, very costly infrastructure projects such as Bus Rapid Transit and the upgrading of wastewater treatment works.

The UIC trend line, reflecting capital expenditure and anticipated spending in the UIC (with approved budgets from 2026/27 onwards), is substantially steeper from 2023/24 than it has been historically. Annual spending is generally lower than budgeted amounts, but the City is working on expanding programme and supply chain management capacity to ensure that approved budgeted amounts, such as those for 2026/27 and beyond, are spent rather than reduced at the 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.

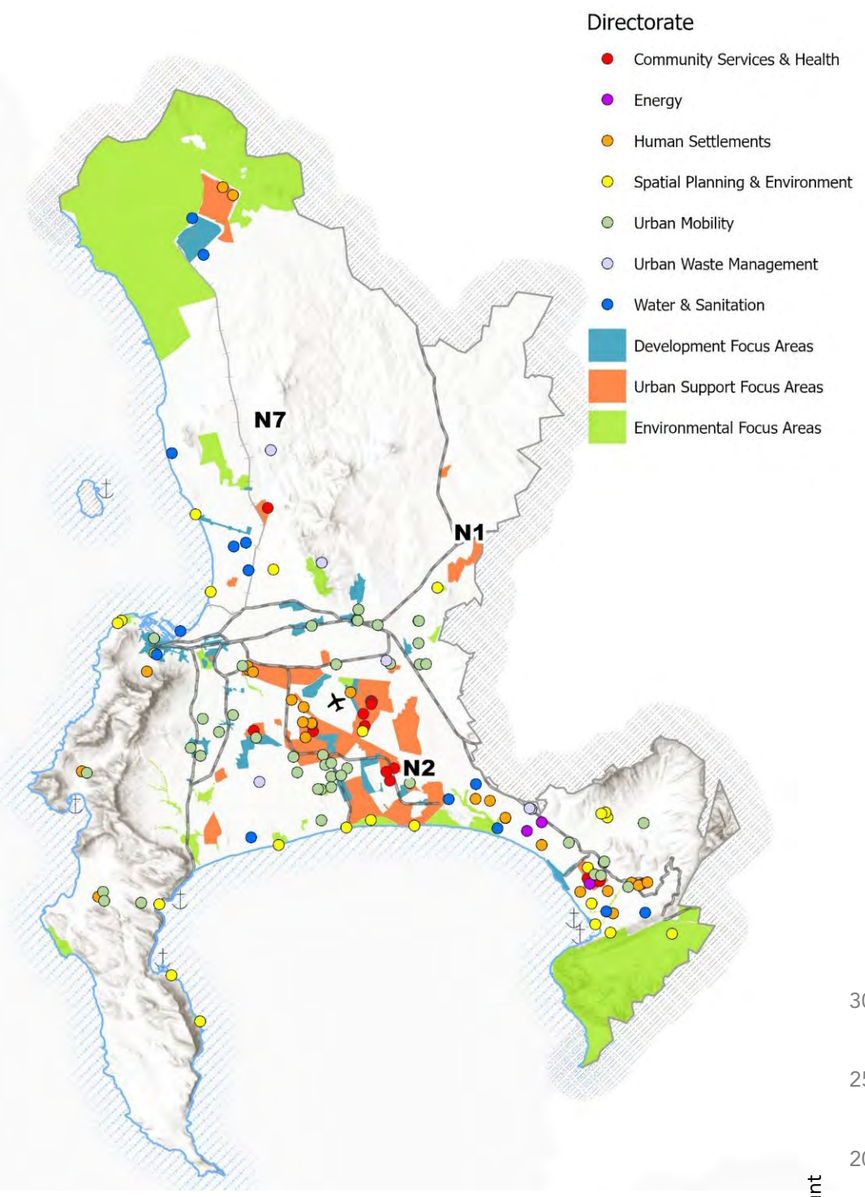
F.3

PUBLIC INVESTMENT

PROGRESS: URBAN RESTRUCTURING AND UPGRADING PROJECTS

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

Data Source: SAP PPM 2026; District Plan Vol. 3 2023



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

PLFA	Count	Percentage
Development Focus Area (DFA)	20	8.8%
Environmental Focus Area (EFA)	16	7.0%
Urban Support Focus Area (USFA)	2	18.4%
Outside PLFA	87	38.2%
Missing Information	28	12.3%
No Location	35	15.4%

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

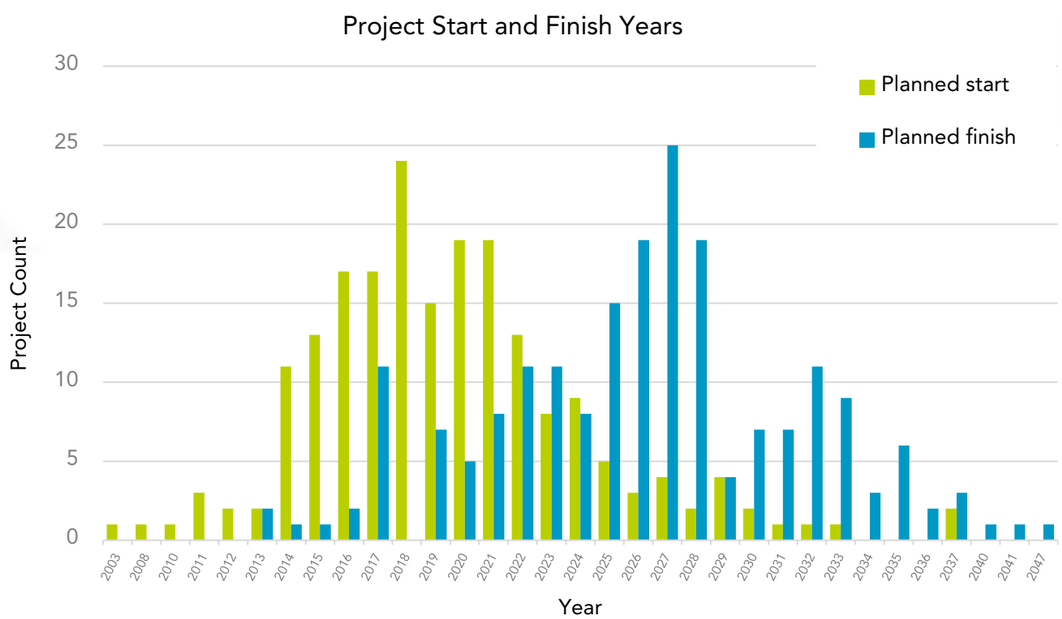
OVERVIEW

This panel monitors progress in implementing prioritised public capital investment projects identified for urban restructuring and upgrading in the eight approved 2023 DSDFs. A total of 228 projects have been recommended for implementation by the various City service delivery line departments. The projects reported on align with Sector Plan priorities and are primarily located within Priority Local Facilitation Areas (PLFAs), including Environmental Focus Areas, Development Focus Areas and Urban Support Focus Areas. They do not represent the complete suite of urban restructuring and upgrading projects identified in the DSDFs.

Map F3-a spatially depicts the location of projects, identifies the lead directorate for each project and indicates alignment with PLFAs. Table F3-a shows that the majority of projects fall within a PLFA. Graph F3-a shows the start and end years of projects, ranging from 2003 to 2047. Figure F3-a shows the number of projects at various stages of the development process. Projects are grouped first by directorate and then by project status. Table F3-b shows the number and current status of projects within each stage gate. Apart from projects with no spatial location, most projects are within the execution and scoping phases.

PROGRESS

The stage gate review indicates that 28,9% of projects are in the project preparation phase, between scoping and conceptual design; 1,8% are in screening; and 57% are in the project execution phase, between detailed design and benefits review. In 2027, four new projects are anticipated to start, while 25 projects are expected to be completed. Spatial Planning and Environment, Urban Mobility, Water and Sanitation, and Human Settlements are responsible for the largest share of projects in the execution phase. Projects in conceptual design are predominantly led by Spatial Planning. A further 24 projects proposed by the DSDFs do not have CPX numbers.



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

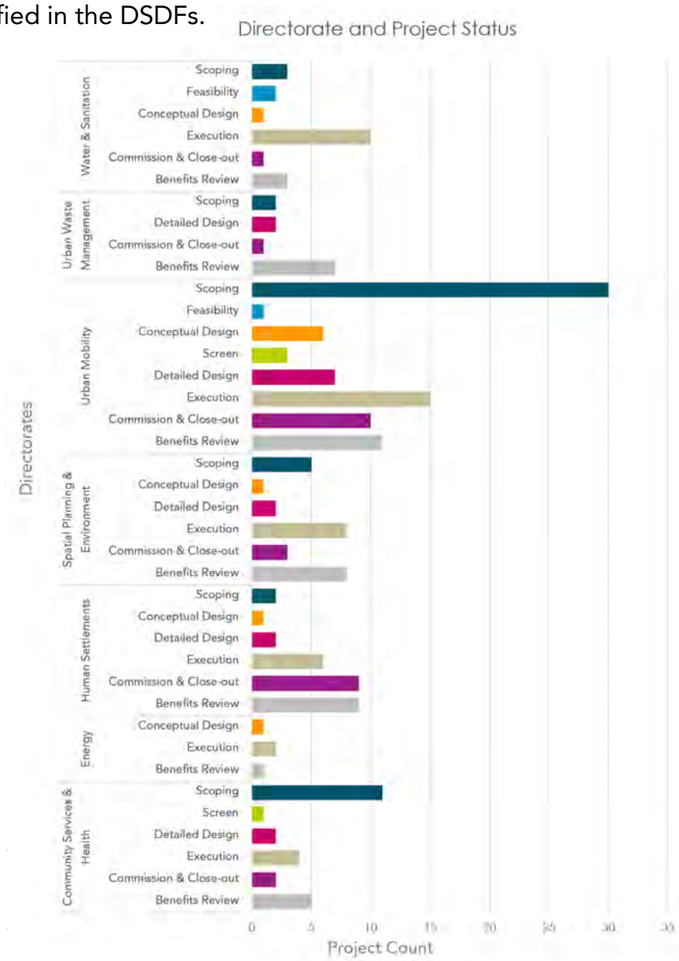


Figure F3-a: Bar chart showing capital investment prioritisation projects per sector and status

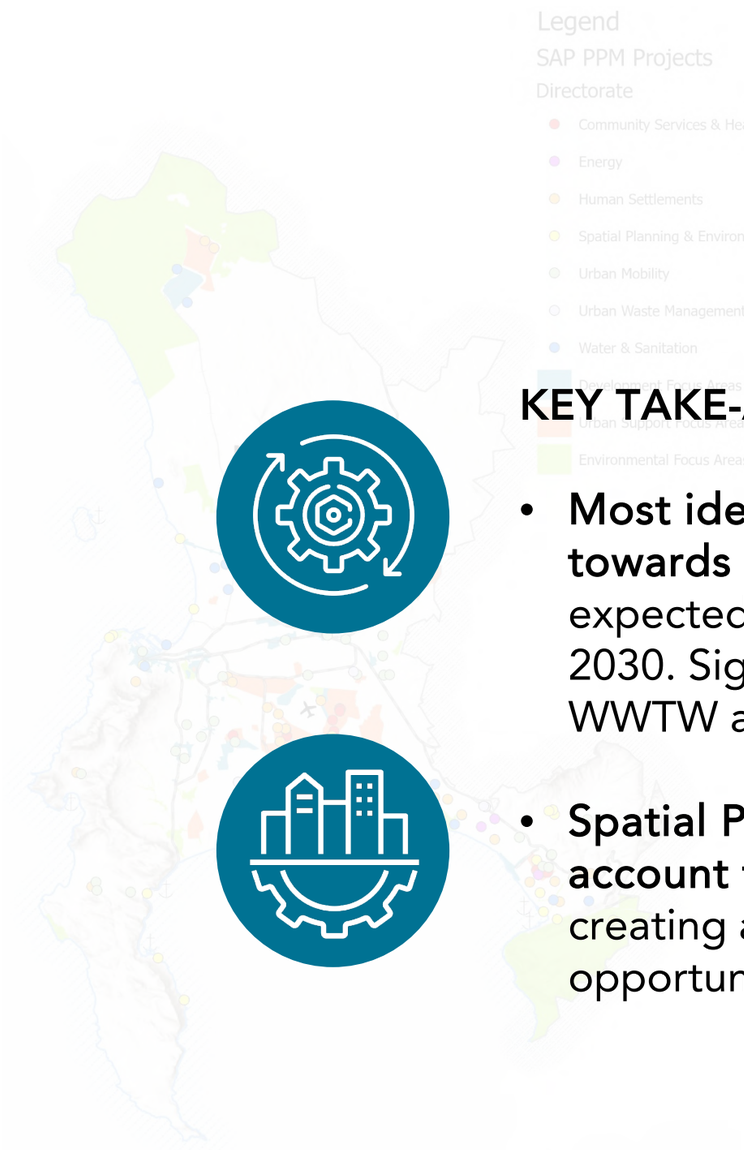
Current Status	Count	Percentage
Scoping	53	23.2%
Feasibility	3	1.3%
Conceptual Design	10	4.4%
Screen	4	1.8%
Detailed Design	15	6.6%
Execution	45	19.7%
Commission & Close-out	26	11.4%
Benefits Review	44	19.3%
Missing Information	28	12.3%

Table F3-b: Current status and project count

PROGRESS: URBAN RESTRUCTURING AND UPGRADING PROJECTS

KEY TAKE-AWAY TRENDS:

- **Most identified urban restructuring and upgrading projects are progressing towards implementation:** By the end of 2025, 91% of identified projects were expected to be under way, while more than 76% are expected to be completed by 2030. Significant projects anticipated for completion include IRT Phase 2A, Potsdam WWTW and Zandvliet WWTW.
- **Spatial Planning and Environment, Urban Mobility and Human Settlements account for the largest number of priority projects,** reflecting the focus on creating a well-planned city with improved transport connectivity and access to opportunities.



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

PLFA	Count	Percentage
Development Focus Area (DFA)	20	8.8%
Environmental Focus Area (EFA)	16	7.0%
Urban Support Focus Area (USFA)	2	18.4%
Outside PLFA	87	38.2%
No Information	28	12.3%
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Table F3-a: PLFA type, Project count and Percentage of projects which fall under PLFAs



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

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Scoping	53	23.2%
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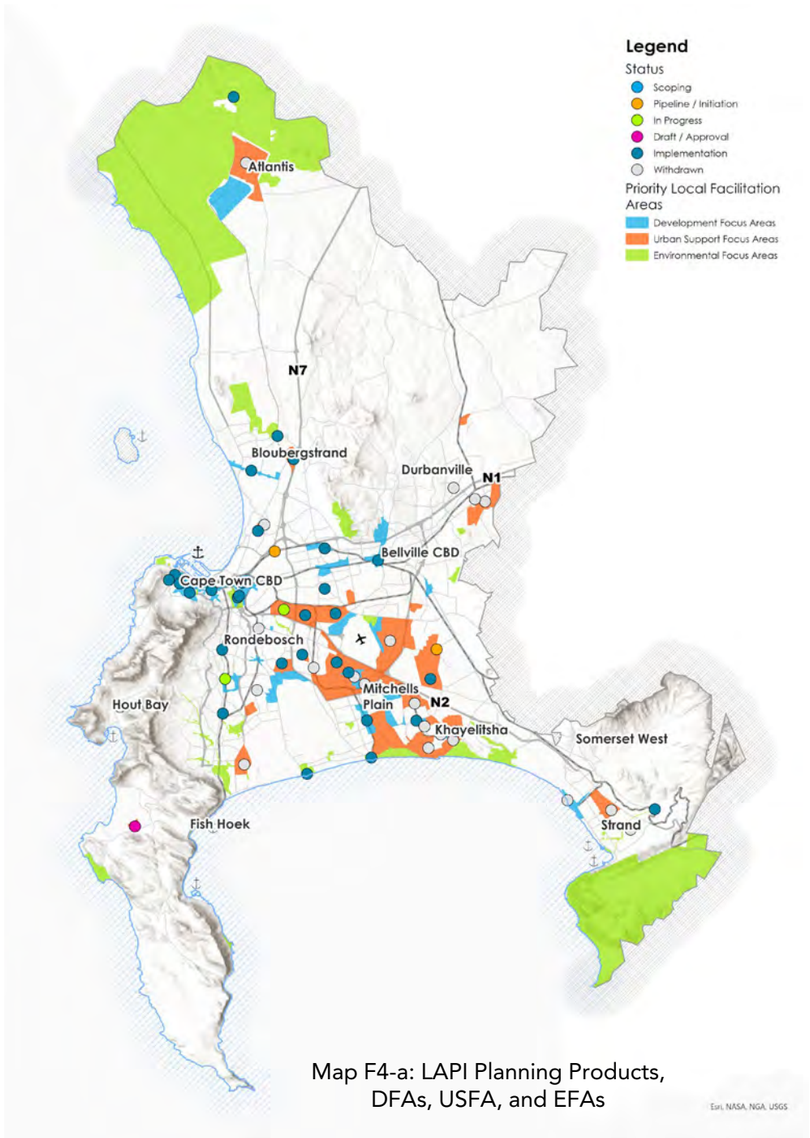
Table F3-b: Current status and project count

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.

Data Source: District Plan Vol. 3 2023



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

OVERVIEW

Local Area Planning Initiatives (LAPIs) include Local Spatial Development Frameworks (LSDFs), Public Investment Frameworks (PIFs) and Precinct Plans (see map F4-a). LAPIs provide more detailed planning direction in strategic locations and have a stronger implementation focus than higher-level spatial development frameworks.

The DSDFs identified Priority Local Facilitation Areas (PLFAs), which provide a district and local-level basis for spatial prioritisation. PLFAs guide public investment, incentives, budgets and planning focus over the short to medium term. They comprise Development Focus Areas (DFAs), Urban Support Focus Areas (USFAs) and Environmental Focus Areas (EFAs) (see map F4-a). A total of 59 new LAPIs were identified and prioritised for investigation in the 2023 District Plans based on their location within PLFAs. Most are now complete or withdrawn, with only four remaining under development.

The current status of each LAPI is shown in figure F4-a. Table Bay has the largest number of active projects, with two in progress. KMPGBD and Southern each have one remaining active project, in pipeline/initiation and awaiting approval respectively.

Overall, 31 projects have been approved or adopted and are now in the implementation phase. LSDFs approved during the past year include Cape Town CBD, Spine Road and Sir Lowry's Pass Village.

Several planned LAPIs have been deprioritised or withdrawn, largely due to changing priorities within other departments and a reassessment of LAPI requirements. Graph F4-a shows projected project completion across two timeframes: zero to five years and five to 10 years. All remaining projects are projected for completion within zero to five years.

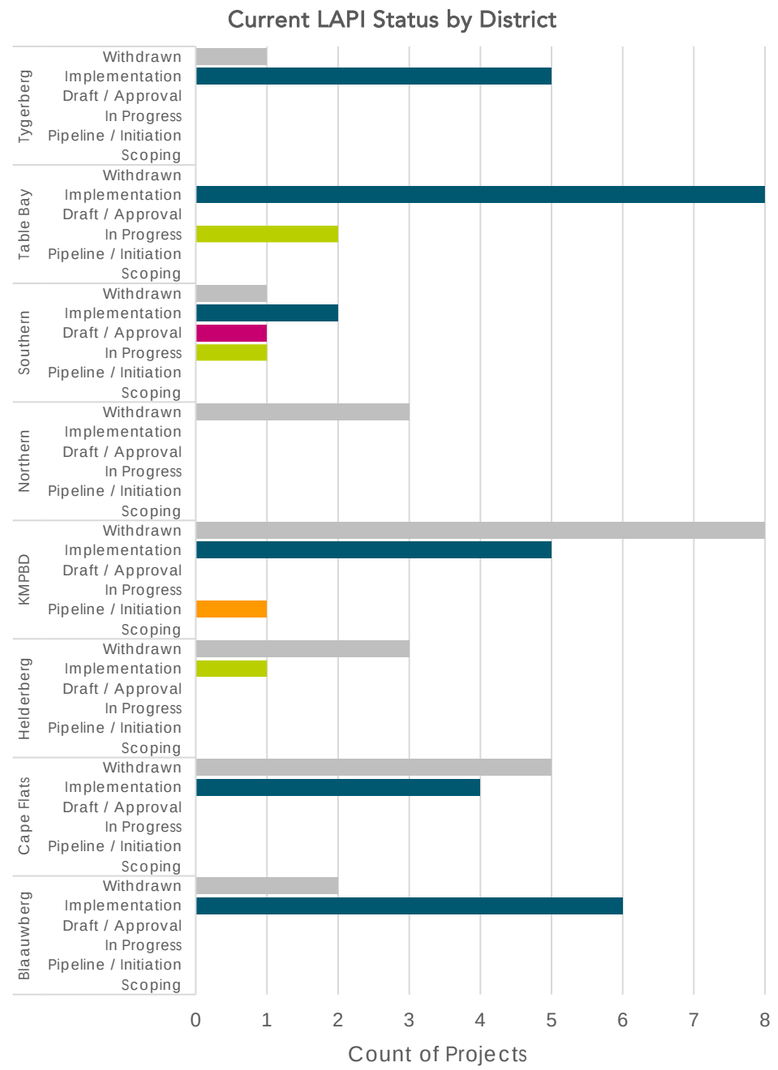
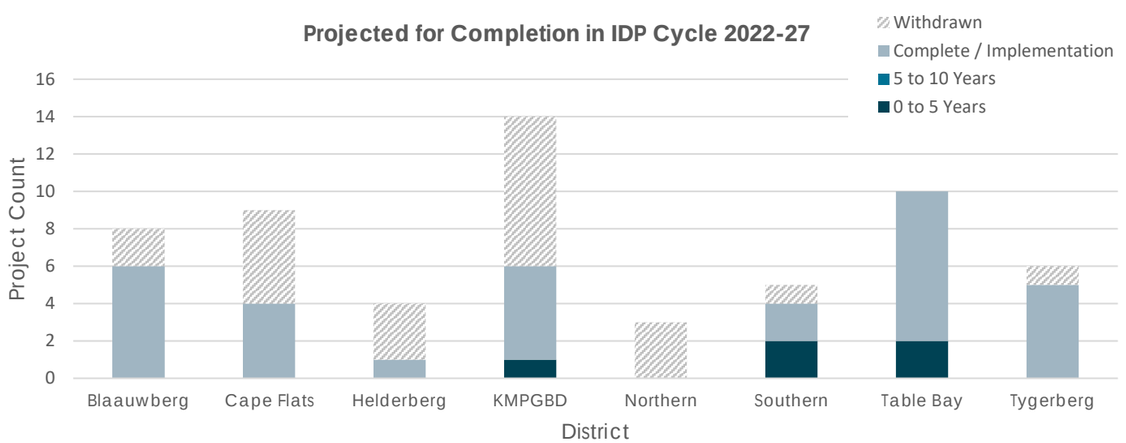


Figure F4-a: Bar chart showing the status of each project per district

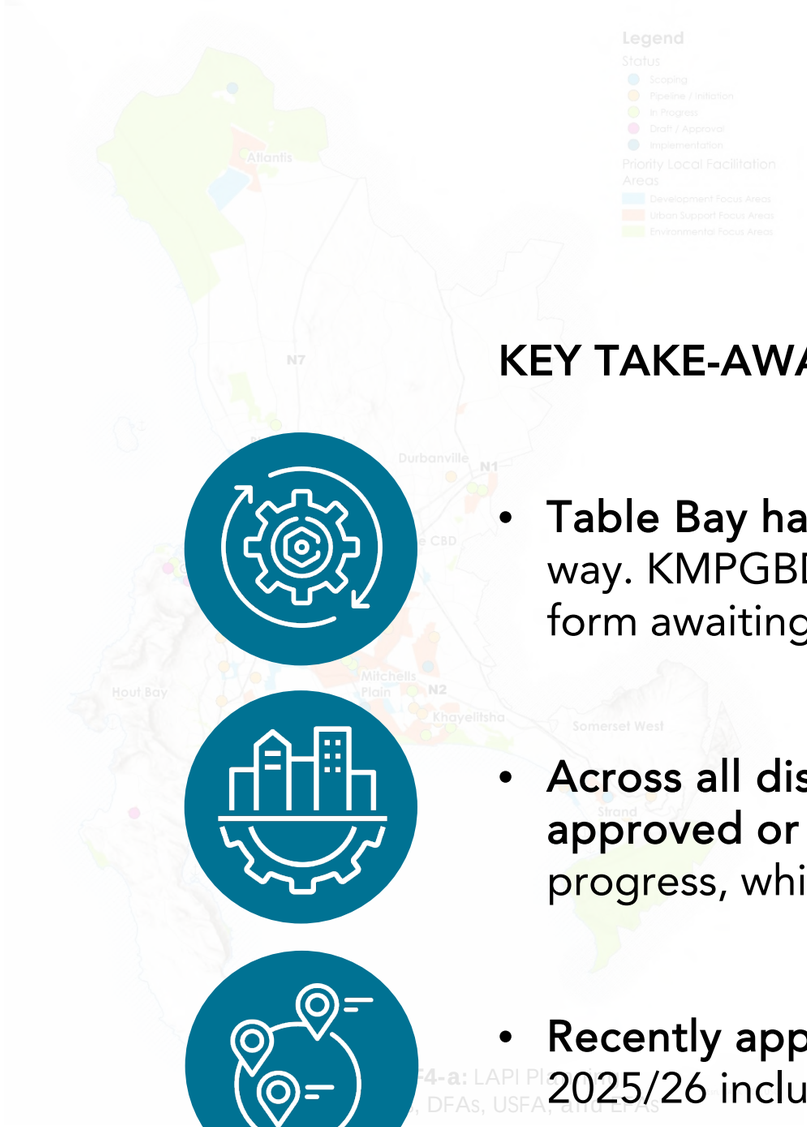
Planning Product Status	Definition	23/24	24/25	25/26	26/27
Scoping	Determining whether LAPI is required / appropriate.	2	2	1	0
Pipeline / Initiation	LAPI planned to commence shortly. (Obtaining approvals, resources, budget)	22	24	3	1
In Progress	LAPI currently underway. *(Investigations, drafting, public engagement)*	20	15	8	2
Draft / Approval	LAPI Product is complete and ready for final approval / adoption.	4	2	2	1
Implementation	LAPI Product has been approved / adopted.	11	17	24	31
Withdrawn	LAPI Product has been cancelled / not prioritised.	-	-	21	24

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

PROGRESS: PRIORITISED LAPIs



Map F4-a: LAPI Pl... DFAs, USFA, and EFAs

KEY TAKE-AWAY TRENDS:

- **Table Bay has the largest number of active LAPIs**, with two projects currently under way. KMPGBD has one project due to commence, while Southern has one LAPI in draft form awaiting approval.

- **Across all districts, 53% of LAPIs originally identified in the DSDFs have been approved or adopted and are in the implementation phase**. A further 7% remain in progress, while approximately 40% have been withdrawn or deprioritised.

- **Recently approved LSDFs are progressing to implementation**. Those approved in 2025/26 include Cape Town CBD, Spine Road and Sir Lowry's Pass Village.

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.

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.

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

G : DEVELOPMENT MECHANISMS/ INCENTIVES

G1 : Progress: implementation of development mechanisms / incentives

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G.1

IMPLEMENTATION TRACKING

PROGRESS: IMPLEMENTATION OF DEVELOPMENT MECHANISMS/INCENTIVES

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

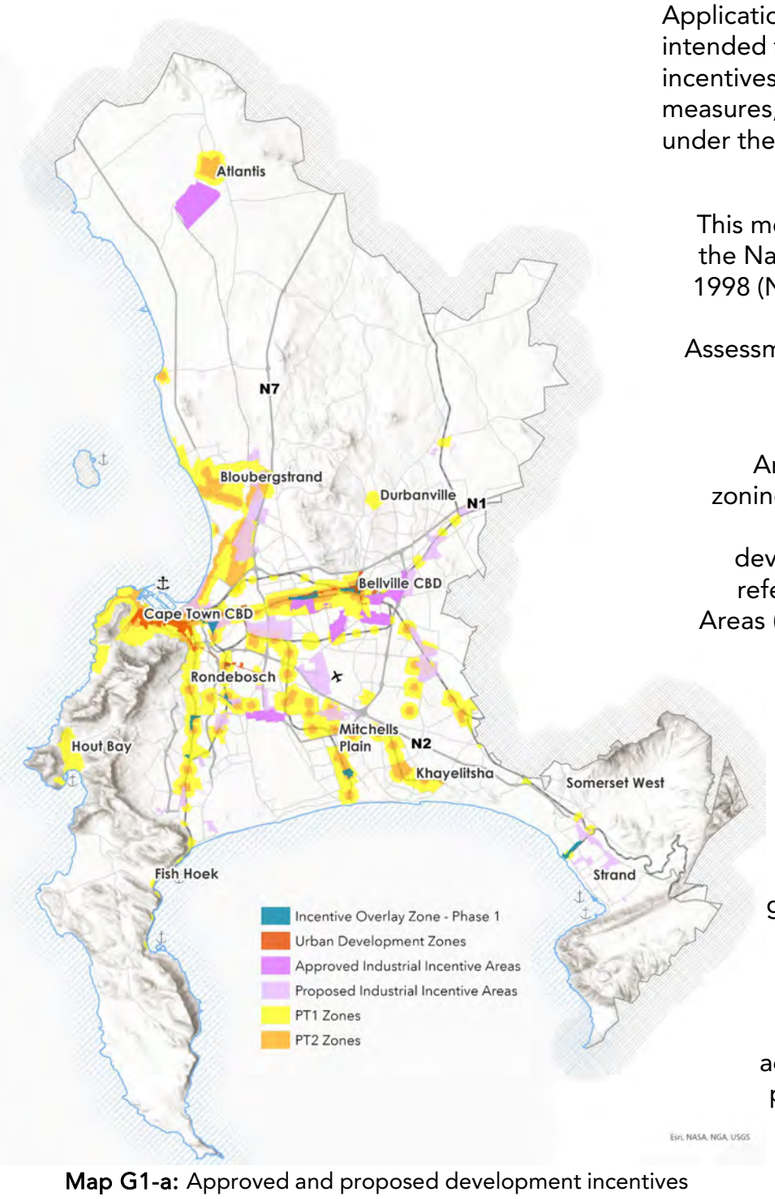
2026 Update

Source: District Plan Vol. 3 2023

OVERVIEW

Current and required development mechanisms were investigated during the DSDF review. The main objective was to identify pragmatic mechanisms that could be implemented within the lifespan of the DSDF to support its development proposals.

This section summarises the progress and status of the following mechanisms: NHRA Exemptions, Industrial Overlay Zones, Draft NEMA Urban Areas, and PT1 and PT2 Zones



Map G1-a: Approved and proposed development incentives

NHRA Exemptions:

The aim of this project is to undertake heritage audits in areas where exemptions from certain sections of the NHRA, including sections 34 and 38, may be investigated. The intention is to reduce the administrative burden and red tape associated with dual application processes required of developers. The investigation focuses on Development Focus Areas (DFAs) with no or limited conservation-worthy heritage resources, following an approach similar to the Parow Station precinct, which was gazetted as an NHRA exemption area (see map G1-b).

Progress:

Active: The seven proposed areas were gazetted for exemptions under sections 34 and 38 as at 20 September 2024. A total of eight areas across the city have now been gazetted.

Investment Incentives Policy:

The Investment Incentives Policy aims to attract job-creating investment to Cape Town and strengthen the city's position as a preferred business destination. The policy currently provides the following incentives: Deferred DC Payments, Exemption of Development Application Fees, Development Application Fast-Tracking and Discounted Electricity Tariffs. The draft Manufacturing Support Policy is intended to supersede the Investment Incentives Policy once approved. Key changes include extending incentives to all 33 industrial areas in the city, providing a broader package of non-financial support measures, and placing greater emphasis on green technology investment. Existing incentives available under the Investment Incentives Policy will be retained under the Manufacturing Support Policy.

Progress:

Active: Incentives under the Investment Incentives Policy have been approved and are currently available in the six manufacturing areas shown in map G1-a, as well as for all tertiary-sector land uses across the city. The 33 proposed Manufacturing Support Policy areas are also shown in map G1-a.

NEMA Urban Area:

This mechanism provides for appropriate exclusions from the National Environmental Management Act, 1998 (NEMA), for listed activities within spatially targeted areas that would otherwise trigger a Basic Impact Assessment or Full Environmental Impact Assessment (see map G1-b).

Progress:

Active: Approved and Gazetted in Act 107 of July 2025

Incentive Overlay Zone (IOZ):

An IOZ is a regulatory tool that applies an additional zoning layer to the base zoning. Its purpose is to enable desired densities, land uses and economic-sector development within strategic priority areas of the city, referred to in the District SDFs as Development Focus Areas (DFAs), through enhanced development rights and reduced approval timeframes (see 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 provide reduced off-street parking requirements for developments in areas already well served by public transport. This aims to encourage development intensification and reduce the number of private vehicle trips generated to and from these areas (see map G1-a).

Progress:

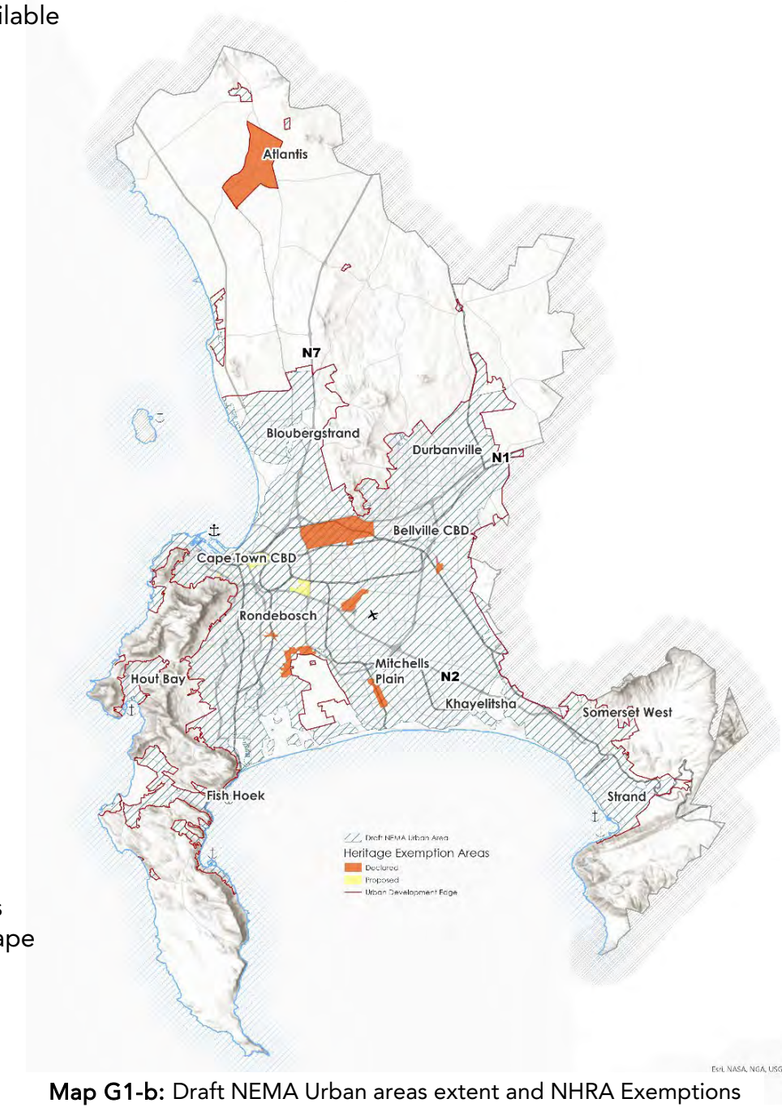
Active: The PT1 and PT2 Areas are approved as part of the Municipal Planning By-Law.

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 investment in commercial and residential development. The incentive currently applies to the Cape Town central city, Parow and Bellville (see map G1-a).

Progress:

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



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

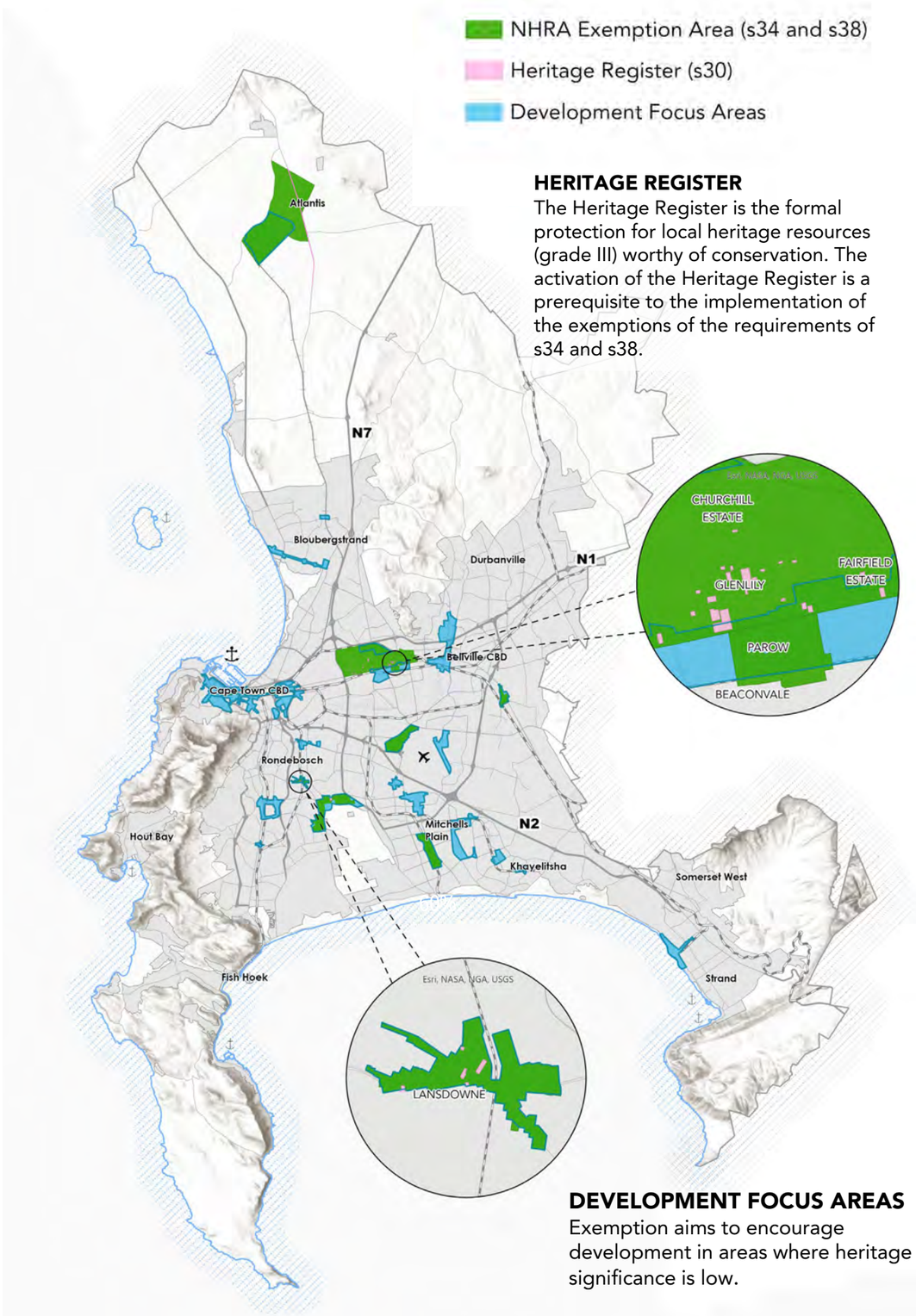
G.1a

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



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

OVERVIEW

The City of Cape Town is the first local authority to activate the exemptions provided for in the NHRA. The first pilot study for the Parow Station Precinct was undertaken in 2017-2021 to exempt this 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 for approving the exemptions, is the formal protection of heritage resources worthy of conservation in these areas. The formal protection within the NHRA for Grade III heritage resources is the Heritage Register (section 30). Sixty additional sites were added through implementation of the exemptions, bringing the total to 72 sites covering 46,4 ha (see graph G1-b).

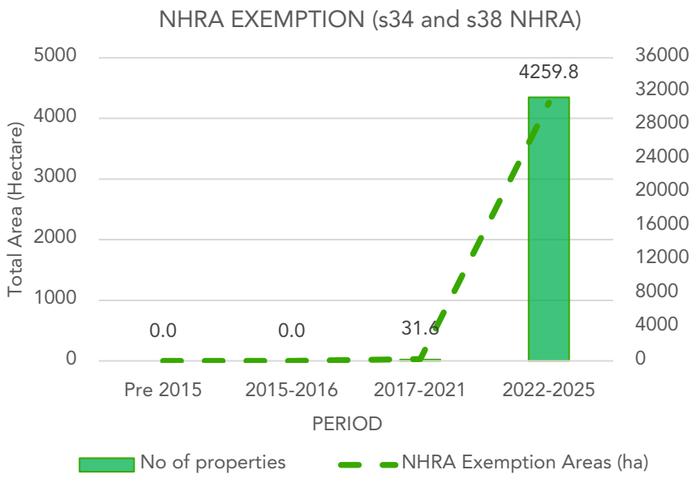
The exemptions from sections 34 and 38 aim to reduce the administrative burden associated with the "60-year clause". Within the NHRA exemption areas, applicants are not required to apply for permits for the alteration or demolition of a structure or part of a structure older than 60 years, while developments that would have triggered s38 do not require HWC approval. 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:

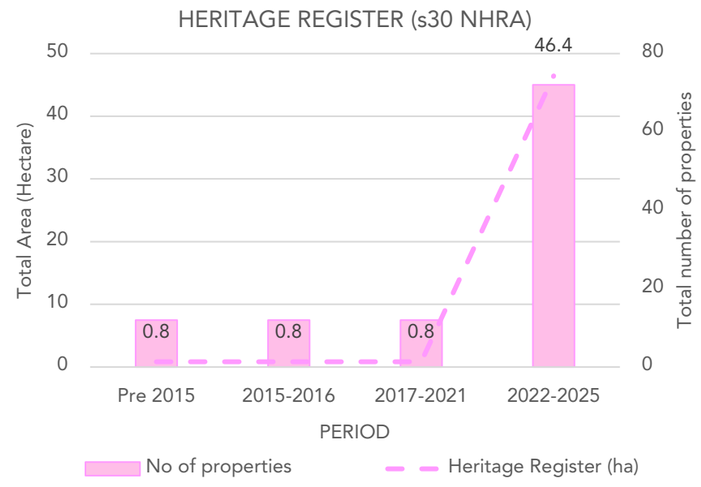
- Improves ease of doing business by removing the dual applications process, saving the applicant time and money
- Encourages development where it is appropriate in terms of (low) impact on heritage significance of the built environment
- Allows heritage management to focus where heritage is significant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

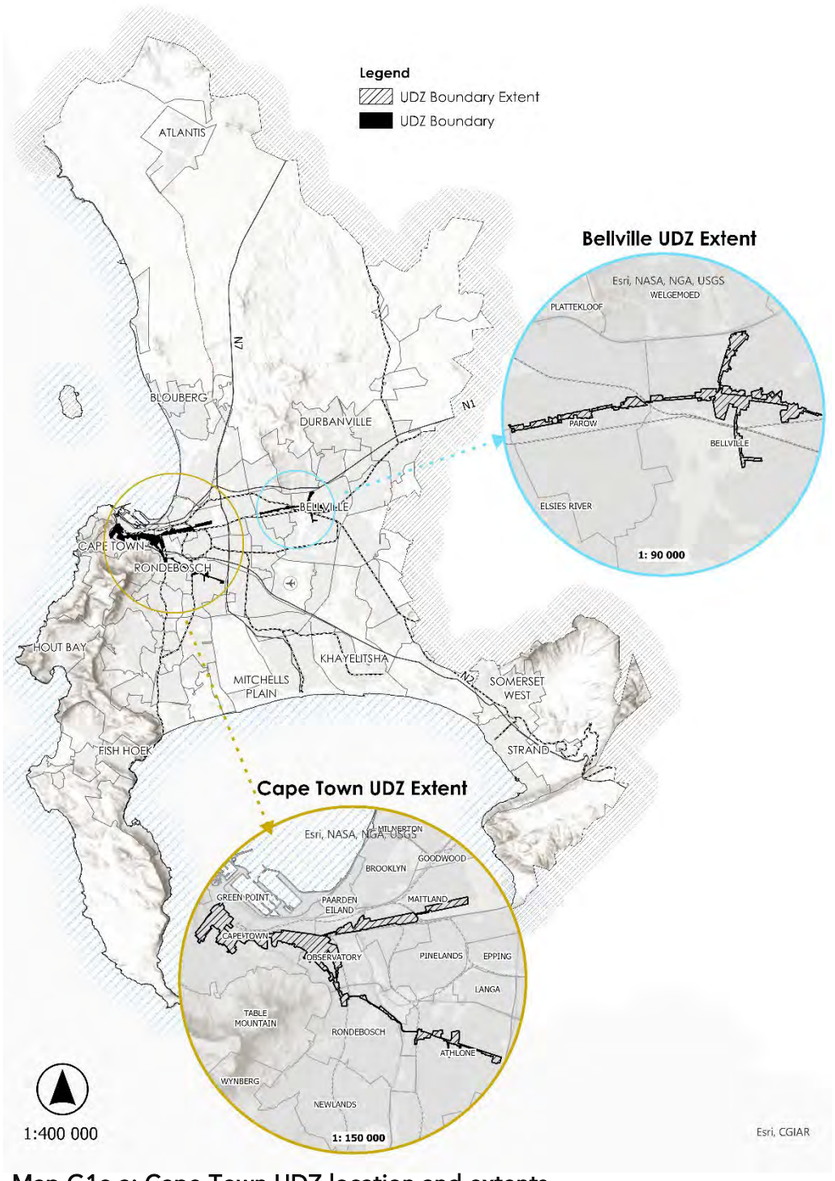
G.1b

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 to 2025). 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.

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



Map G1c-a: Cape Town UDZ location and extents

SPATIAL TREND (DISTRIBUTION/PATTERNS)

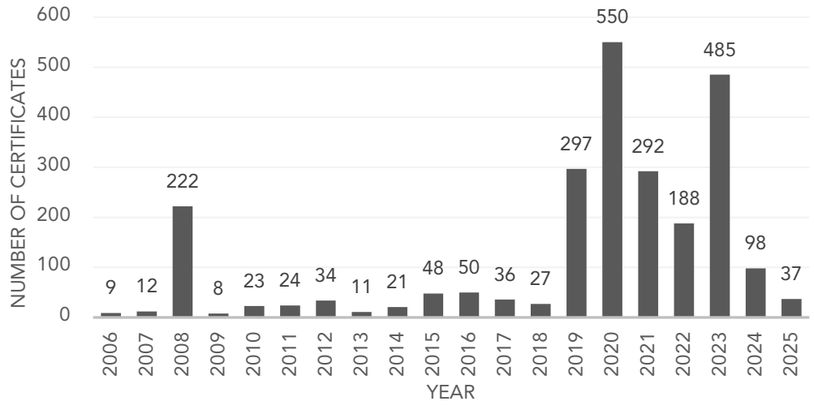
The Cape Town and surrounds component of the UDZ has experienced more activity than the Bellville and surrounds component. The other residential claims category showed clear dominance in 2019 and maintained a similar trajectory in 2020, before decreasing in 2021 and 2022. Woodstock, Salt River and Observatory accommodated the largest share of these residential claims, with the Cape Town CBD and parts of Maitland and Athlone also contributing to the distribution of residential claims (see map G1b-c). Commercial UDZ claims have also been concentrated in the Cape Town CBD, with a limited number recorded in Maitland and Observatory.

OVERVIEW

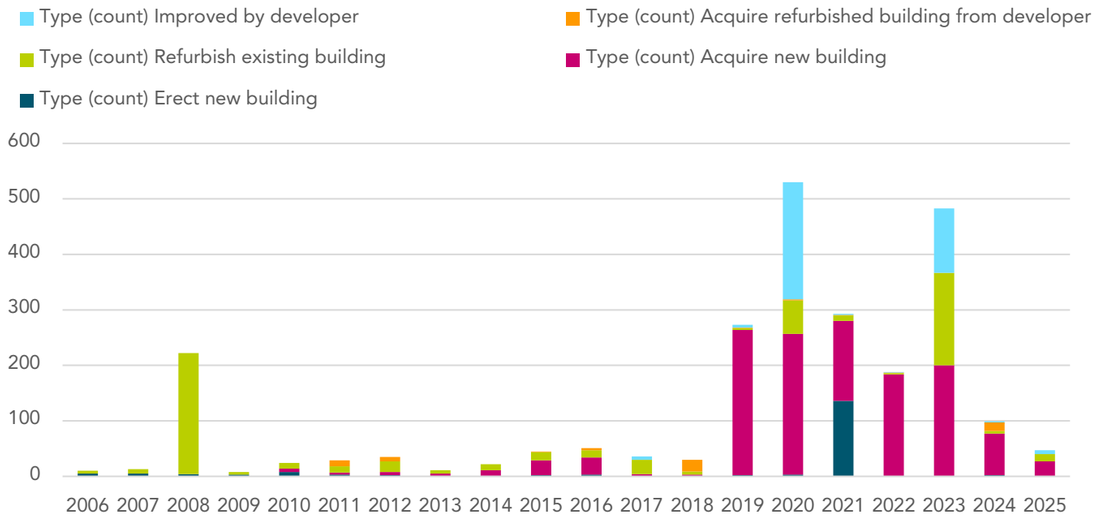
The Cape Town UDZ was gazetted on 14 October 2004 (Government Gazette No. 26866). It is a tax incentive scheme administered by the South African Revenue Service (SARS) and is aimed at encouraging inner-city renewal across South Africa. Any taxpaying, property-owning individual or entity with a UDZ may claim the tax benefits available through the UDZ incentive. The incentive is currently operating under a five-year extension, which expires on 31 March 2030.

OVERALL TREND

The UDZ had a gradual start, with low uptake during the first seven years, followed by a steady increase from 2015 onwards. A significant increase in claims began in 2019, with subsequent years recording totals approaching 200 claims (see graph G1b-d). The highest number of claims was recorded in 2020, with a total of 550. During the formative years of the UDZ (2006 to 2014), claims were recorded only in the Commercial and Other Residential land-use categories. Low-cost Housing and Industrial claims were introduced in 2015; however, uptake in these categories has remained limited, with Other Residential dominating claims between 2015 and 2025. Although the Other Residential category has continued to account for the largest number of claims, the value of claims within this category has gradually decreased.

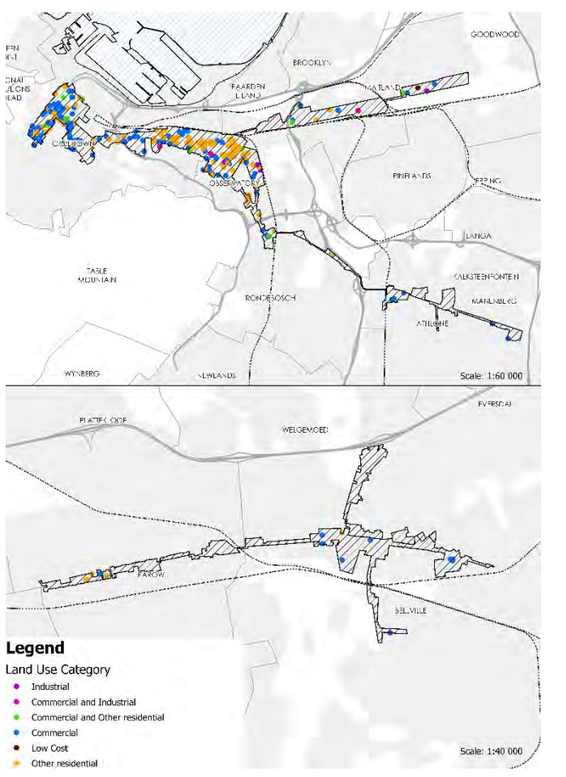


Graph G1c-b: Total UDZ certificates issued (2006 to 2025 part of the year only)



Graph G1c-a: Number of UDZ certificates issued by Type, 2006 to 2025

The relatively low number of claims within the Bellville area could be attributed to the extent and delineation of the current UDZ boundary. This trend was highlighted as part of the UDZ performance review, which included motivation for the re-delineation of the UDZ boundary across Cape Town. Research on property sales indicates that transactions have occurred within the Bellville area across the four UDZ land-use categories. However, claims in the Low-cost Housing category are almost non-existent. The lack of affordable housing development within the UDZ boundary constrains uptake in this category, particularly given the R350 000 claim limit associated with it.



Map G1c-b: Spatial distribution of claims by Land Use Category (2006 to 2025)

G.1

IMPLEMENTATION TRACKING

PROGRESS: IMPLEMENTATION OF DEVELOPMENT MECHANISMS/INCENTIVES

- **Recently approved mechanisms include the NEMA Urban Area Incentive and Incentive Overlay Zones.** The NEMA Urban Area Incentive was approved and gazetted in July 2025, while the Incentive Overlay Zones were approved, gazetted and came into effect on 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).

- The **draft Manufacturing Support Policy is intended to supersede the current Investment Incentives Policy once approved.** Key changes include expanding the incentive from six areas to all 33 industrial areas in the city, providing a broader package of non-financial support measures and placing greater emphasis on green technology investment.

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
Version 4.0	**Comprehensive Report**	**November 2026**

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, 2022 and 2025
Property Sales Transactions	CCT – Valuation Department	2010 – 2026
Bio-Net	CCT – Environmental Management	2009 – 2026
Environmental Land Acquisitions	CCT – Environmental Management	2012 – 2026
Heritage Register s30	CCT – Heritage Management	2015 – 2025
Agricultural Areas of Significance	WCG – Department of Agriculture	2012 – 2023
EIA Applications	WCG – DEADP	2018 – 2025
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	2016/17 – 2025/26
Capital Projects (SAP PPM)	CCT - Corporate Project, Programme and Portfolio Management	2014/15 - 2025/26 as of June 2026 for CoCT and Mar 2024 for WCG

END

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