

**BELFAST AREA PLAN**  
**Phase 1 Report: Business Activity**  
**July 2009**



**Prepared by**  
***Christchurch City Council***

## EXECUTIVE SUMMARY

The purpose of this report is to assist in the preparation of the Belfast Area Plan project. This Phase I Report is prepared with regard to the management of the business and industrial resources in the Belfast area, and the formation of new economic commercial developments. That is to say, the report consolidates:

- all existing knowledge (both historic and recently acquired for the project purpose);
- adds to that a professional perspective about business and industrial growth in the Belfast settlement generally;
- identifies issues arising in anticipation of possible future development within Belfast; and finally
- suggests a possible way forward.

Economic activity and business growth are key components of the Belfast Area Plan, as they:

- Provide for the economic growth of the area, as well as the provision of employment and the provision of services or retailing;
- Can alter in the future in terms of both the sector provision of business and industrial activity, their servicing requirements and locational parameters and preferences;
- Can have a number of impacts and demands on the area in which they are located.

Manufacturing, a historic employer in the area for decades has decreased in the number of businesses, but not in employees. Economic activity within Belfast has been largely driven by retail and construction growth over the last six to eight years. Despite this, 'white collar' commercial employment opportunities in Belfast remain out of proportion with the number of Belfast residents employed in such occupations, resulting in a migration of such employees commuting out of Belfast.

Belfast contains a vast amount of the City's vacant industrial land resource, which given the lack of infrastructural service provision to these areas is not currently in demand. Once service provision is secured to these areas, as well as the provision of improved access to the area through the Northern Arterial and Western Belfast Bypass, demand is expected to increase.

The spatial extent of retail activity in the area is somewhat larger than what would be needed to service just the population of Belfast. The extent of commercial development in the area therefore also services a wider catchment, including the extent of passing commuter trade. Subject to a substantial growth in resident population in the area, a moderate extension of the Belfast Super Centre may well be appropriate (as a District Centre, zoned Business 2) to provide for a greater convenience and leisure function and role for the residents of Belfast.

### DISCLAIMER

*This Council does not guarantee the accuracy of the data or information contained in this Phase 1 Report. Whilst every endeavour has been made to compile data and information that is up to date and relevant, not all of it has been, or is capable of being verified. The Belfast Area Plan Phase 1 Report on Business Activity, and others for the Belfast area of Christchurch, should not be relied upon for the purposes of any proposed property transaction, including subdivision or land use approvals.*

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## 1.0 INTRODUCTION

1.1 The purpose of this report is to provide an overall scoping document on the economic development of the Belfast Area. In particular it records the existing level of economic activity in the area, and outlines the potential land use requirements for future economic development.

1.2 Economic Activity is a key component of the formation of the Belfast Area Plan.

The significant matters to be considered surrounding economic activity for Belfast are:

- Provision for economic activity to occur within the area, to provide for the people and communities within Belfast, either as places to work, or through the provision of services and retailing. This reduces the propensity for the community to access employment, goods and services outside of Belfast reducing transport trips and providing a more efficient urban environment;
- Impacts of economic activity on the natural and physical environment, including impacts and constraints which may over time alter the nature and location of industrial activity;
- The appropriate locations for economic activities given that they have a diversity of scales of impacts and also demands; and
- The key requirements to support economic growth in the area.

### 1.3 Information Sources

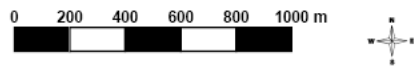
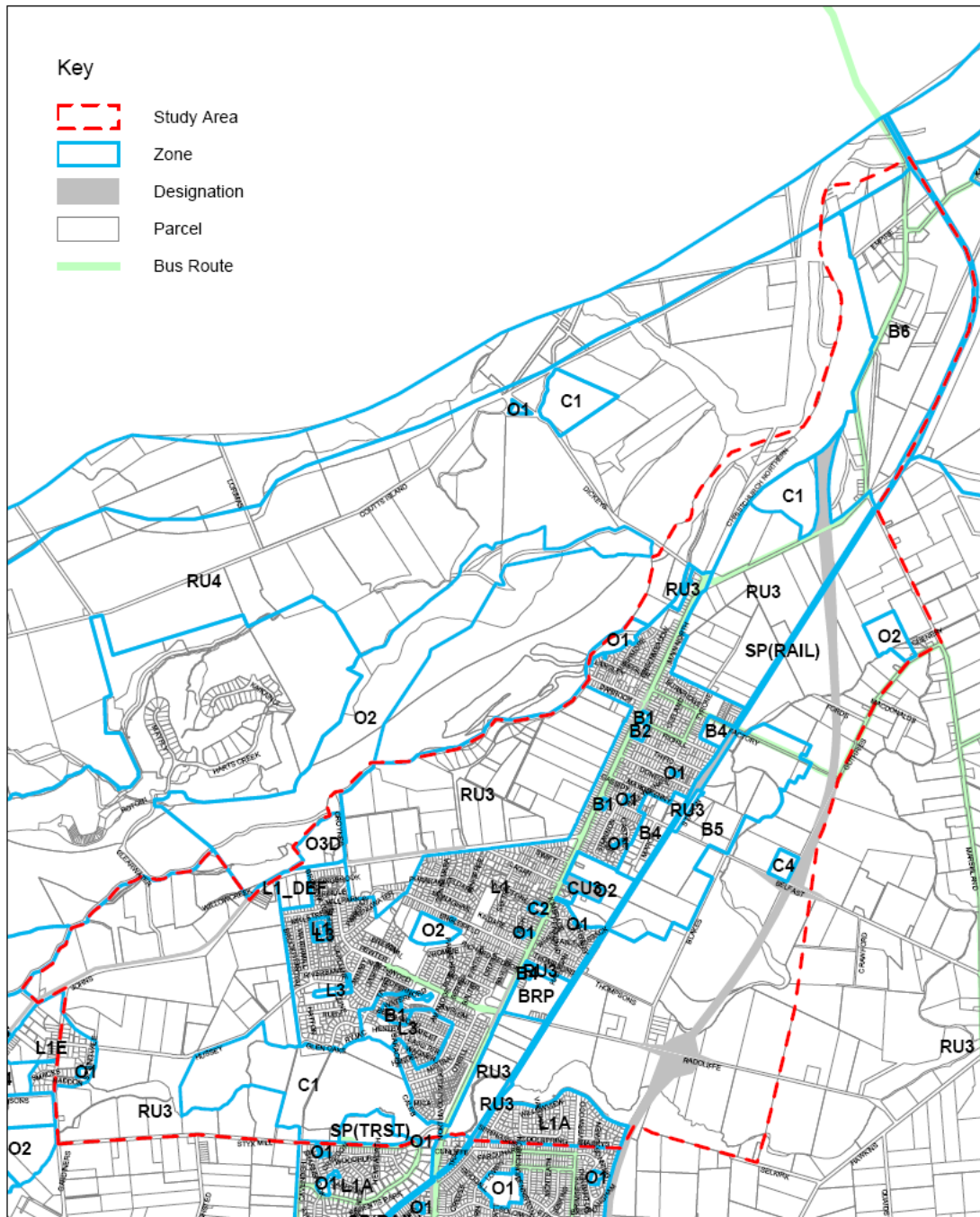
Information has been obtained from a variety of sources and publications, including:

- **Census of Population and Dwellings 2001 and 2006.** Statistics NZ
- **Household Economic Survey.** Statistics NZ
- **Christchurch Commercial Strategy Discussion Document. 2004.** Property Economics.
- **Draft Commercial Strategy.** 2006. Christchurch City Council.
- **Draft UDS Industrial Strategy Discussion Document. 2004.** Property Economics
- **Belfast Retail Overview. 2005.** Property Economics
- **Christchurch City Plan – Retail Variation, Industrial Land Evaluation. 2005.** Peter Cook
- **Business Frame. 2000, 2004.** Statistics New Zealand.
- **Longitudinal Business Frame 2008.** Statistics New Zealand.

### 1.4 Location and Meshblocks

**Figure 1** illustrates the study area and existing zoning for spatial areas relevant to the Belfast Area Plan. **Figure 2** outlines the ‘meshblocks’ (Census Statistical Units) that have been used as a basis for assessment throughout this report.

Figure 1: Belfast Study Area & Zoning



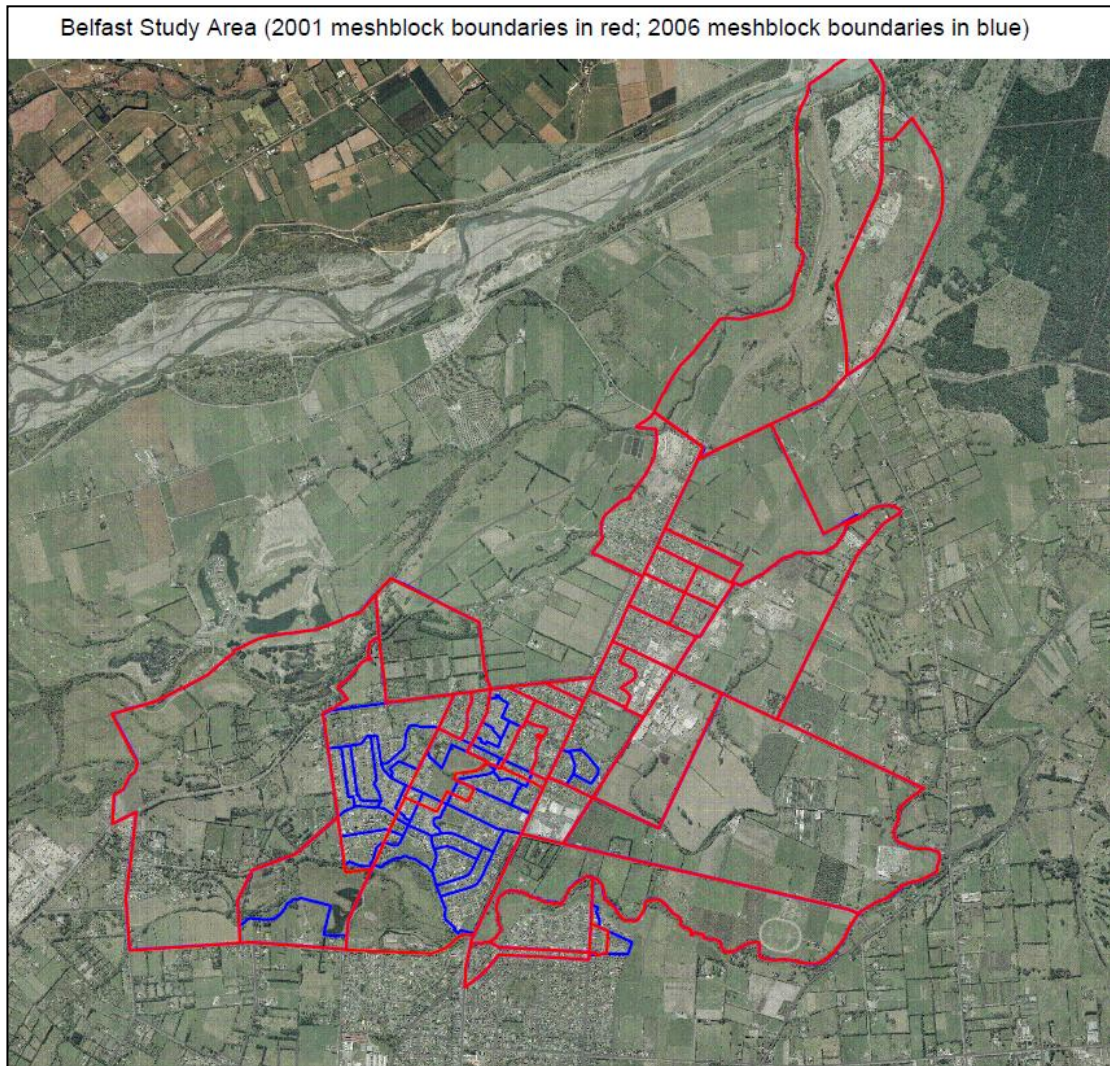
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**BELFAST AREA PLAN  
INFRASTRUCTURE BASE**

IT Services  
Christchurch City Council  
Map: AP001739  
Layout: Infrastructure Base  
Date: 01/11/2006

Source: CCC Zoning Maps, November 2006

**Figure 2: Statistical 'Meshblocks'**



*Source: Statistics New Zealand, Longitudinal Business Frame date 2008.*

## 2.0 ECONOMIC DEMOGRAPHICS

### Belfast Employment Demographics

- 2.1 **Figure 3** shows the breakdown of employment (by Full Time Equivalent workers or 'FTE's') in the Belfast Area as compared to Metropolitan Christchurch (the spatial area of general commuting distance to Christchurch City, i.e. this area includes Rolleston and Rangiora). The information within **Figure 3** is based on Statistics New Zealand 2008 Longitudinal Business Frame data. The table shows that a substantial proportion of those employed within Belfast are in a manufacturing related industry. The next most significant industries for employing workers in Belfast are Construction and Retail respectively. Typically these industries have significant land dependencies, in that they require substantial sites in areas of relatively cheaper land, and generally accessible lower skilled surrounding populations.
- 2.2 In comparing the Belfast FTE's to that of Metropolitan Christchurch<sup>1</sup> (**Figure 3** and **Figure 4**) there are some significant matters that become apparent. If it can be assumed that Metropolitan Christchurch has a sustainable employment base, in that employees are diversified over the range of industries, then it can be assumed that Belfast does not have such a diversified employment base. Some 35% of FTE's in Belfast are employed in Manufacturing. Should there be a significant downturn in manufacturing activity within New Zealand, this may well occur at the expense of manufacturing industries and employment within Belfast. The land use consequences of such a direction may well be that alternative uses would need to be found for areas previously used for manufacturing activities. In addition, available infrastructure would be required to ensure that there would be the ability to enable the rapid transition of employment within the locality into other Business sectors.

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<sup>1</sup> Metropolitan Christchurch includes those urban townships within commuting distance to Christchurch City, e.g. Rangiora, Rolleston etc.

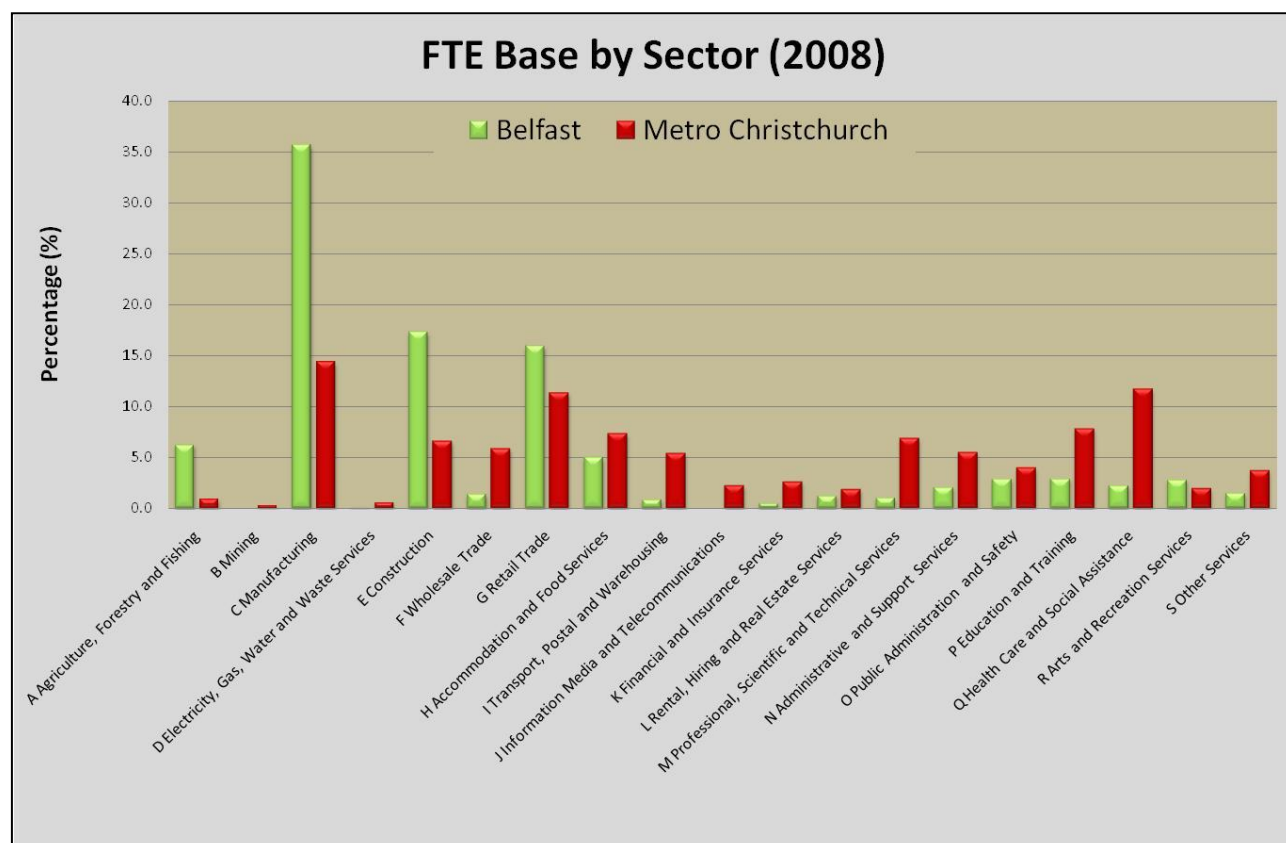
**Figure 3: Employees by Sector – Belfast FTE's vs Metropolitan (Urban) Christchurch**

<b>Industry of Employment ANZSIC</b>	<b>Belfast Employees (FTE's)</b>	<b>Belfast Percentage</b>	<b>Metro Employees (FTE's)</b>	<b>Metro Percentage</b>
A Agriculture, Forestry and Fishing	203	6.2	1,823	0.9
B Mining	0	0.0	449	0.2
C Manufacturing	1,163	35.6	29,250	14.3
D Electricity, Gas, Water and Waste Services	6	0.2	1,018	0.5
E Construction	564	17.3	13,445	6.6
F Wholesale Trade	45	1.4	11,913	5.8
G Retail Trade	520	15.9	23,165	11.3
H Accommodation and Food Services	161	4.9	14,955	7.3
I Transport, Postal and Warehousing	27	0.8	10,905	5.3
J Information Media and Telecommunications	0	0.0	4,530	2.2
K Financial and Insurance Services	15	0.5	5,172	2.5
L Rental, Hiring and Real Estate Services	39	1.2	3,752	1.8
M Professional, Scientific and Technical Services	33	1.0	13,985	6.8
N Administrative and Support Services	67	2.1	11,131	5.4
O Public Administration and Safety	93	2.8	8,030	3.9
P Education and Training	94	2.9	15,945	7.8
Q Health Care and Social Assistance	71	2.2	23,845	11.7
R Arts and Recreation Services	90	2.8	3,853	1.9
S Other Services	48	1.5	7,470	3.6
<b>Total</b>	<b>3,265</b>	<b>100.0</b>	<b>204,670</b>	<b>100.0</b>

*Source: Statistics New Zealand, Longitudinal Business Frame (2008).*



**Figure 4: Employees by Sector – Belfast vs Metropolitan Christchurch**



Source: Statistics New Zealand, Annual Longitudinal Business Frame 2008.

- 2.3 Employment in Belfast has ramifications in terms of both transportation outcomes and also housing types. For example, if the only housing stock in the area caters towards the higher end of the market (predominantly purchased by high wage earners), it has to be expected that there will be some outward migration of those involved in activities such as Finance and Insurance, Professional Services, and Health and Education sectors are not well represented in Belfast itself. Therefore, a large number of office workers that live in Belfast will be commuting to the CBD.
- 2.4 A comparison with **Figure 6** (Belfast resident occupations) indicates that at 2008 there was some inward migration of labour, particularly within the manufacturing sector. For example, there are currently 1,163 FTE's employed in the 'Manufacturing' sector (Source: Statistics New Zealand, Business Frame 2008). Of this number, only 381 (Trades Workers) and 369 (Plant and Machine Operators, NZSCO Census 2006) FTE's reside in Belfast (although it cannot be assumed that all these employees work in Belfast itself).

### 3.0 BELFAST POPULATION DEMOGRAPHICS

3.1 **Figure 5** outlines the general economic demographic profile for the Belfast Area in comparison with Christchurch City over the Census periods of 2001 to 2006. The key points from this table are as follows:

- A considerable change in the mix of household incomes in Belfast as a consequence of net migration into newer residential suburbs such as Northwood. In 2001 the greatest proportion of households (87.8%) was within a lower income bracket (\$0 - \$50,000) within Belfast, reducing to some 40.8% by 2006. By comparison, within the <\$50,000 income bracket, Christchurch City changed from 65% (2001), to 44.4% (2006).
- The proportion of household incomes over \$70,000 has increased from 8.6% (2001) to 33.7% (2006) in Belfast. Within the City as a whole, household incomes over \$70,000 increased from only 18% to 27.3%.

*Note: Natural wage increases should also be factored into the interpretation of these statistics.*

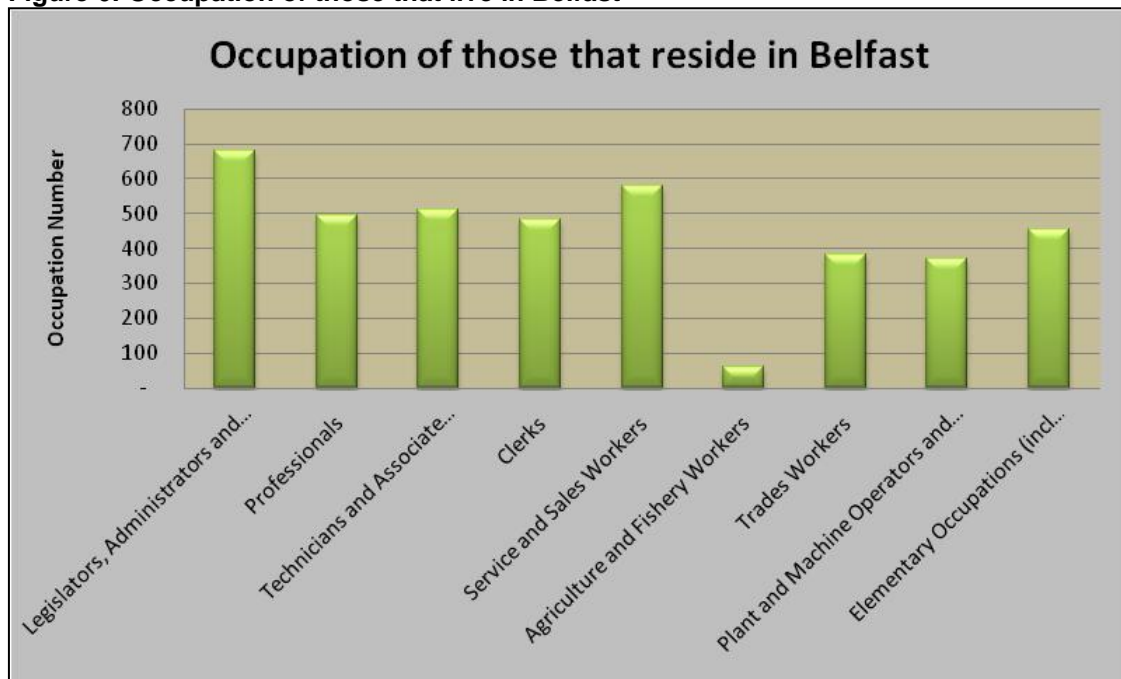
**Figure 5: Belfast Economic Demographic Profile (2001 and 2006)**

	Belfast (2001)	Christchurch City (2001)	Belfast (2006)	Christchurch City (2006)
<b>Population</b>	<b>3,954</b>	<b>312,439</b>	<b>7,641</b>	<b>348,435</b>
<b>Households (private occupied dwellings)</b>	<b>1,360</b>	<b>121,578</b>	<b>2,844</b>	<b>133,743</b>
<b>Average Household size</b>	<b>2.9%</b>	<b>2.6</b>	<b>2.7%</b>	<b>2.6%</b>
<b>Growth rate 2001 – 2006 (%)</b>	<b>-</b>	<b>-</b>	<b>47%</b>	<b>7%</b>
<b>Household income profile</b>				
\$0 - \$30,000	66.4%	43%	24.2%	27.0%
\$30,001 - \$50,000	21.4%	22%	16.6%	17.4%
\$50,001-\$70,000	5.5%	16%	14.8%	14.4%
\$70,001-100,000	1.2%	10%	17.3%	13.5%
\$100,001 +	7.4%	8%	16.4%	13.8%
Not recorded	-	-	10.8%	13.9%
<b>Employment</b>				
Total employed (FTE & Part time)	2013	146,985	4,128	178,092
Total Unemployed	90	10,857	108	8478
Total unemployed (%) (labour force over 15 years)	2.9%	4%	1.8%	3.0%

*Source: Statistics New Zealand Census Data 2001 and 2006*

3.2 **Figure 6** outlines the occupation of those people that reside within Belfast. What the figure illustrates is that a number of Belfast residents work in the service or professional and management sectors although, as shown in **Figure 4** there is a lack of such employment in Belfast. Such a trend is at odds with the current secondary (such as manufacturing or construction trades) type employment opportunities available within Belfast itself (refer **Figure 3**). This confirms the comment that many of the residents of Belfast are likely to commute into the City for employment.

**Figure 6: Occupation of those that live in Belfast**

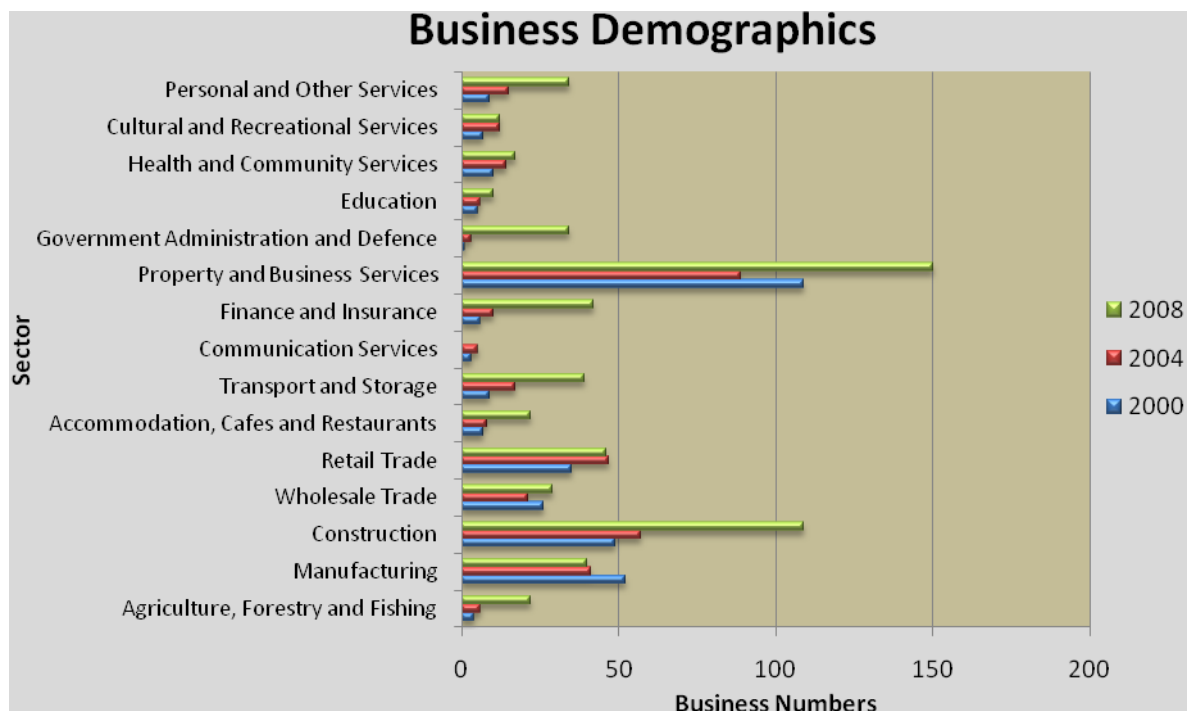


Source: Statistics New Zealand 2006 Census Data

## 4.0 BELFAST BUSINESS DEMOGRAPHICS

4.1 The major economic growth in Belfast over the last four years has predominantly been in the Construction sector and the Retailing sector, and also with Property and Business Services. **Figure 7** illustrates the change in business numbers by sector over the last 5 years. **Figure 8** illustrates the corresponding changes in employment numbers. The growth in the retail sector is largely attributable to the emergence of the Supa Centa, a large format retail centre on the corner of Radcliffe and Main North Roads, as well as the New World Supermarket on the opposite corner of Main North Road.

Figure 7: Belfast business numbers: 2000 - 2008

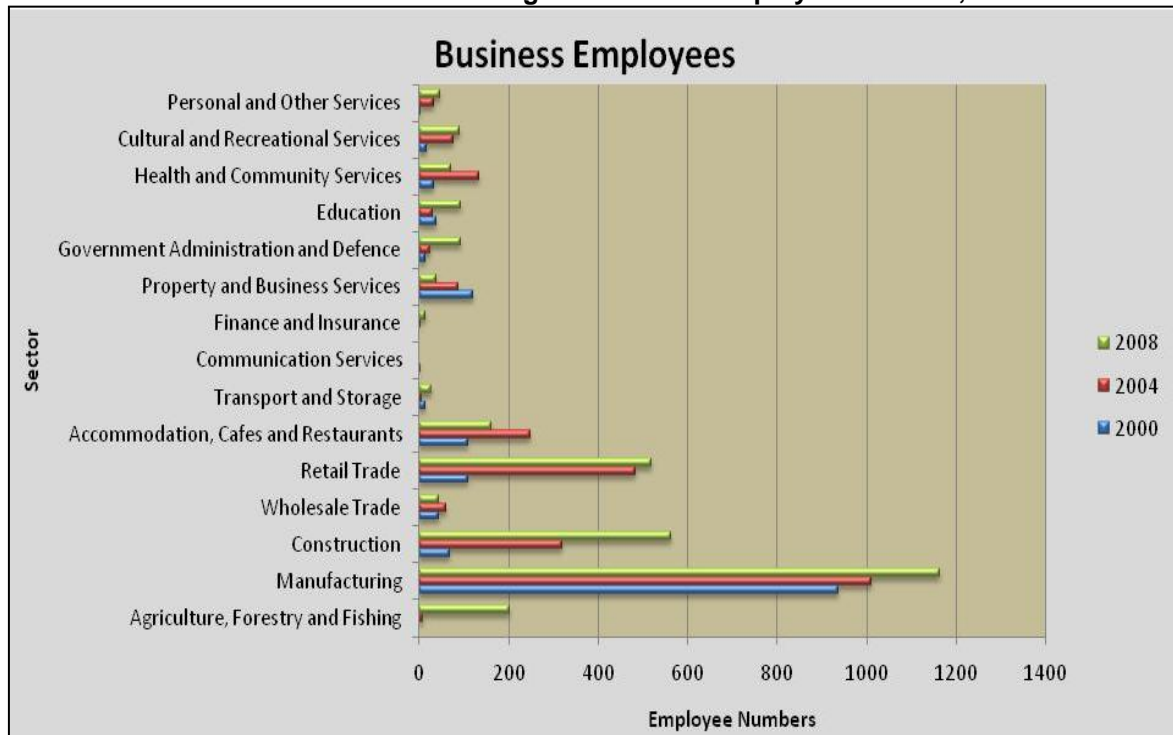


Source: Statistics New Zealand, Annual Business Frame Update 2000, 2004. Longitudinal Business Frame 2008.

Note: These results should be conservatively interpreted as they rely on Statistics New Zealand Business Frame date for 2000 and 2004, and the modified 2008 Longitudinal Business Frame data which relies on an improved set of business demography statistics.

4.2 Other business sectors that have increased in number between 2000 and 2008 include: transport and storage; finance and insurance; and personal and other services. For the construction and transport sectors, this increase is to be expected given the growth in such sectors nationally over the time period. Furthermore the locational characteristics of Belfast are of benefit to these sectors, for example, access to quarries, and access to the State Highway network. Business sectors illustrating a static trend, or a decrease in business numbers include: manufacturing, wholesale trade, cultural and recreational services. Whilst the number of businesses involved in manufacturing has decreased from 52 to 40 during this time period, the number of overall staff has increased from 936 to 1,163. This is likely to reflect an increase in FTE density in existing premises, or an increase in scale of some of the existing businesses, as there has been little in the way of building consents for new industrial premises within Belfast during this time period.

**Figure 8: Belfast employee numbers, 2000 - 2008**



Source: Statistics New Zealand, Annual Business Frame Update 2000, 2004. Longitudinal Business Frame 2008.

Note: These results should be conservatively interpreted as they rely on Statistics New Zealand Business Frame data for 2000 and 2004, and the modified 2008 Longitudinal Business Frame data which relies on an improved set of business demography statistics

4.3 The key point from this analysis is that even with the recent substantial growth in the retail market, there is a shortage of business and employment options for those seeking other 'white collar' work opportunities in the Belfast area in terms of the office, finance and commercial related sectors. In addition, whilst the number of manufacturing business numbers has decreased, it is those businesses that have increased staff numbers.

**Summary**

- Retail and construction growth has been the predominant economic driver of the Belfast economy over the last six to eight years.
- Manufacturing, whilst decreasing in business numbers remains a considerable employer within the area.
- There are few 'white collar' commercial employment opportunities in Belfast. It would be appropriate to facilitate office activities for any increase in the commercial zoning for the area.

## 5.0 THE BELFAST MARKET

5.1 This section provides an overview of some of the key drivers of economic development and employment within Belfast.

### 5.2 Employment

**Figure 3** and **Figure 4** revealed the breakdown of Full Time Equivalent employees ('FTE's') in Belfast based on Statistics New Zealand Longitudinal Business Frame data 2008. These figures indicate a high proportion of manufacturing, and construction and retail trade workers, and a very low proportion of tertiary industry workers in sectors such as commerce, health and education, and government. It can therefore be expected that the predominant type of business premises within Belfast will be a low density, in that they are industrial type premises on larger sites with moderate to low staff numbers per hectare of land utilised. Should this trend continue, it can be expected that larger tracts of land in the Belfast area would be required to provide employment opportunities in comparison with higher density business activities such as commerce or office activity.

### 5.3 Current land supply

The amount of land currently zoned for business in the Belfast area has been provided by the Christchurch City Council down to meshblock level.

5.4 **Figure 9** shows the amount and type of business land zoned in this area. The amount of vacant land has been defined by the Christchurch City Council as industrial land that remains undeveloped. It is noted that there may well be other impediments to such land being developed, such as contamination issues.

**Figure 9: Belfast Area – Business Zoned Land 2007, Vacant Land proportions.**

	Business zoned land	Vacant	Percentage vacant
Commercial Zoned Land	(B1, B2) 2.66ha (BRP) 7.30ha	0ha	0%
Industrial Zoned Land (B4-B6)	168.84ha	58.68ha	35%
	Vacant Zoned Land (Belfast)	Total vacant Zoned Land	Belfast Proportion
Industrial Zoned Land (B3-B6)	58.68ha	287.7ha (in Christchurch)	20%
Industrial Zoned Land (B3-B6)	58.68ha	711ha (in metropolitan Christchurch (2004) i.e commuting distance)	11%

Source: CCC Industrial Vacancy Register, 2007

5.5 **Figure 9** shows that 35% of the area zoned for industrial activity in Belfast remains vacant. On the face of it, the information above would indicate that whilst the Belfast industrial areas account for 8% of the City's 2100ha of industrial land, it accounted for some 20% of the City's current share of vacancies at 2007.

5.6 The Christchurch City Council's Industrial vacant land register ('VLR') dated June 2007 identifies some 287.7 hectares of vacant industrial land for the City, excluding that land identified as Special Purpose Airport Zone. There has been a steady decline in the area recorded in the VLR decreasing from 625.8 hectares in June 1992 to 287.7 hectares in June 2007, a fall of 54% during this 16 year period, at an average uptake of just over 24ha, although the 2008/2009 year recorded only a 7.2ha take-up. These statistics take into account not only land take-up but also land rezoned for industrial purposes.

- 5.7 It would also indicate that even though no new rezoned industrial land has been provided for in the Belfast area since the City Plan decisions were released in July 1999, that industrial land uptake in the area has been slow. This is confirmed in **Figure 10**, which shows that the uptake of vacant industrial land in Belfast from 2000 – 2006 was very low. The increase in take-up has not changed dramatically since.
- 5.8 The construction of the Supa Centa for retailing activity was the only major development on industrially zoned land over this time period. The main reasons for the slow uptake of industrially zoned land in the Belfast area are that:
- 14 ha of the vacant industrial land in Belfast is zoned B5<sup>2</sup>. Much of this land is owned by the PPCS freezing works and is utilised primarily for the grazing component of their existing operations.
  - The 62 remaining hectares are zoned B6 (Rural Industrial). The area at Styx / Chaney's contains large blocks of as yet undeveloped land owned principally by the Regional Council. Development is constrained at present by: the lack of water supply; the provision of sewage disposal; and short term lease arrangements. It has thus attracted 'dray industries' including businesses requiring large yard areas such as timber processors, machinery operators and housing companies. The location of this area is such that should sewer and water supply be provided it is likely to be in some demand from warehousing, distribution and logistics companies, due to its excellent access to distribution routes to other parts of the South Island, and access to main transport terminals such as the airport. It is noted that the Canterbury Regional Council has earmarked the provision of infrastructural services to their portion of this Business 6 zoned area. Industrial land demand may also increase when the Northern Arterial is constructed which would also provide easier access to the ring road serving Lyttleton Port.
- 5.9 It is noted that the 2005 evaluation by Peter Cook, Registered Valuer in relation to Industrial land vacancies in the City, actually highlights the above Business 6 zoned land as having impediments which are unlikely to be overcome until the area is serviced, and ownership and tenancy issues overcome.
- 5.10 Mr Cook identifies (page 6) that the *"historic take – up rates would suggest that the land in these localities is not sought after. The reasons will be mixed but include the Environment Canterbury land much of which is in leasehold tenure, low profile of Belfast sites held as large blocks by the Freezing works, that have been unavailable historically as sites for development / redevelopment. The "actual vacant" land in the north area represents 37.7% of the total [actually identified by the Council in the June 2004 Industrial Vacant Land Register]. In contrast, the average take-up represents only 6.3% of the Christchurch Total."*
- 5.11 The 'north area' referred to by Mr Cook incorporates Johns Road, Sheffield Crescent business areas and Papanui, as well as the Belfast and Kainga / Chaney's business areas specific to that report.

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<sup>2</sup> Property Economics, Discussion Document on the UDS Area Industrial Strategy. Page 23.



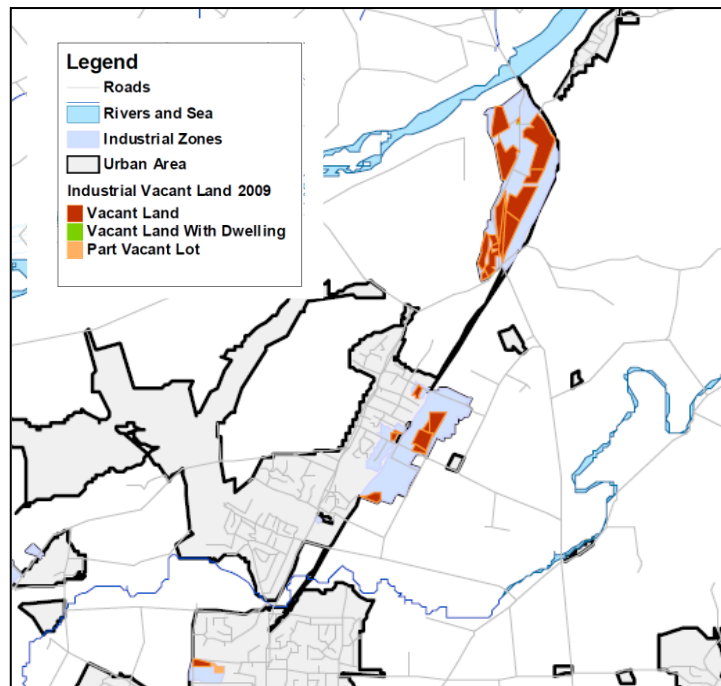
**Figure 10:**  
Uptake of  
vacant  
Industrial  
Land

Source: CCC June 2007. Industrial vacant land register.

5.12 **Figure 11** spatially illustrates the vacant industrial land resource within Belfast. The majority of this vacant land is located within the unserved Business 6 zoned area at Styx /Chaney's.

**Figure 11: Belfast Area - Vacant Industrial Land, June 2009**

Source: CCC June 2009. Industrial vacant land register.



**Summary**

- Belfast contains a large amount of the City's vacant industrial land resource.
- The uptake of this land is low, due primarily to a lack of services, ownership issues and the absence of a more efficient arterial road network.
- Once these impediments are overcome it can be expected that demand for industrial development in the area will increase considerably.

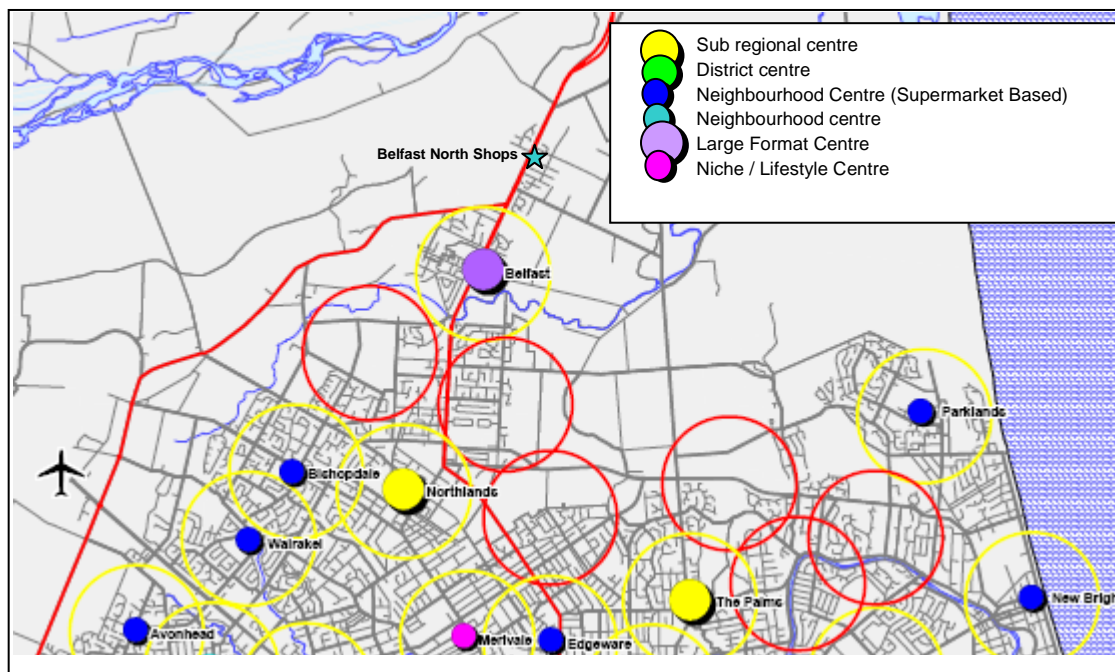


## 6.0 EXISTING COMMERCIAL ACTIVITY IN BELFAST

### Commercial Market

- 6.1 In commercial terms, the Belfast Study area is located within the north western quadrant of the City's network of retail centres.
- 6.2 Currently Belfast itself has two main commercial nodes – the Belfast North shops and the Northwood Supa Centre. The Supa Centa provides a range of activities including large format retail and is zoned Business Retail Park, but also provides offices, food and beverage outlets, a gymnasium and automotive services. The closest sub-regional centre is located at Papanui – Northlands some 5km to the south east of central Belfast. This sub-regional centre services a considerable component of the north-west area's major retail needs.
- 6.3 **Figure 12** illustrates the location of the main shopping centres located within the northern part of the City, including the Belfast study area. Given its close spatial proximity, the Northwood New World Supermarket has been incorporated as a component of the Supa Centa 'Centre'. Also illustrated is the location of those retail centres within close proximity to Belfast.

**Figure 12: Northern Sector Major Retail Nodes**



Source: Modified from Property Economics, 2006

### *Belfast North*

- 6.4 Belfast North is a local centre with a small grouping of mainly convenience stores grouped around a centralised carpark. The centre primarily services local residents' day-to-day retailing needs for frequently purchased retail goods, although it may receive some passing trade from City bound traffic. Being a local centre, it mainly draws people from its immediate catchment, i.e. generally within 500m or from people visiting either the post office or doctor's surgery.
- 6.5 The status of the Belfast North Centre in the City's retail hierarchy has changed as a result of the relocation of the New World supermarket to a more southerly position opposite the Northwood Supa Centa. This has resulted in a significant decline in the number of shopping trips to the Belfast North centre, and changed its role from a

supermarket based convenience centre to what it plays today – a local convenience centre. The establishment of a new Bar / Restaurant on the old New World site has added to the centre's mix of services, but has not changed the function or role that the North Belfast centre plays in the community from a retail perspective. It is identified in the Draft Commercial Strategy (2006) that the existing Business 2 (district centre) zone notating the site is no longer appropriate, and should be replaced by a Business 1 (local centre) zoning.

- 6.6 The Belfast North centre has a good level of parking, very good exposure and is centrally located in relation to the current distribution of residential activity within Belfast. This provides efficient access and convenience, allowing the centre to perform its new role in the community successfully. Continued retail development beyond the immediate vicinity of the centre is such that it is unlikely that Belfast North will ever play a role above that of a local centre. However, in saying that, it is an important role for the community and this should be recognised through the relevant zoning in the City Plan. The impact of further residential development such as that proposed for the Applefield / Devondale Estate block between Johns Road and Main North Road, or to the south, east and west of Belfast through the Area Plans process will result in this centre being at the northern extent of a consolidated Belfast.
- 6.7 There are a number of non-residential uses on the eastern frontage of Main North Road from the south of Third Street continuing sporadically to the Business 1 zone at the corner of Belfast Road, and further to Sheldon Park. It is acknowledged that it is unlikely that these will easily revert to a more residential use, and it may be appropriate that when Main North Road is downgraded there could be scope for a comprehensive examination of this frontage as a main street, or collection of semi-commercial / community nodes. Such a proposition would be heavily dependent on securing a safe functional access to Main North Road and would likely be easier to facilitate by way of specific resource consent for agglomerated blocks.
- Northwood Supa Centa*
- 6.8 The now established Northwoods Supa Centa has become a major retail centre in Belfast. With two supermarkets included in its retail mix it has now become the major retail focus of the community for the majority of frequently purchased food and beverage needs, and less frequently purchased items.
- 6.9 Being a large centre with a number of national banner brands on offer including the Warehouse and Smiths City, the Supa Centa attracts shoppers from a wide catchment. It therefore also services a portion of the community's less frequently required retail needs, e.g. whiteware / gardening supplies. This means that the Supa Centa has a high position and role in the City's retail hierarchy, which is likely to remain.
- 6.10 With two new large format supermarkets, being Woolworths, and the New World across Main North Road, the centre plays an important role in meeting the needs of Belfast's food and beverage requirements. Two modern large format supermarkets is more than the current local resident population could normally sustain (as a rule of thumb 12 000 – 15 000 people can sustain one large format supermarket), and it is likely both Supermarkets are bolstered by pass by trips. Given this, no additional supermarkets should be considered appropriate within the Belfast area even with considerable population growth.
- 6.11 The Northwood Supa Centa has a high provision of carparking, and being located on Main North Road has a high profile position. As noted, the Centre does contain some small, many commercial service activities, restaurants and a community gym.
- 6.12 The Christchurch City Plan notes that changing circumstances in the communities and infrastructure supporting the Supa Centa Business Retail Park zone may give

rise to the necessity for further investigations for potential future rezoning (refer Policy 12.9 'Retail Parks').

*Plan Change 22*

- 6.13 Plan Change 22 as privately lodged with the City Council and notified in October 2008 seeks to rezone a 9.21 ha site from Rural 3 to Business 2. The site concerned is that land to the south east of the intersection of Main North Road and Radcliffe Road, directly south of the existing Supa Centa, and the south east of the New World at Mounter Avenue. The site at present contains some rural dwellings, and has been traditionally used for horticulture and market garden activities. Information contained within the Plan Change application identified that some 45,000m<sup>2</sup> GFA would be developed, with 10,000m<sup>2</sup> of this being for non-commercial activities such as community facilities.
- 6.14 A key component of the proposed Plan Change is the extent of control to be applied to the site if rezoned Business 2 (district centre) zone, through an outline plan that incorporates such matters as the layout, design and setbacks of likely development. It is understood that the proposal is centred on the provision of a holistic 'town centre' which would contain public and private community facilities, commercial employment opportunities, social and retail activities.
- 6.15 The Council Hearing for the above was heard by Independent Commissioners in July / August 2009, and a decision is expected prior to 2010. It is noted that whilst this Technical Paper identifies a more modest district centre in this location the scale of the district centre identified in this Belfast Area Plan will be amended to reflect the final decision on Plan Change 22 as this is being rigorously considered through its respective statutory process.

*Belfast future retail prospects*

- 6.16 A complete examination of the zoned, consented and proposed commercial development for the Belfast area includes the following:

**Figure 13: Belfast future retail prospects**

Centre and Location		Zone	Land Area
Existing	Belfast North, located on the corner of Richill Street and Main North Road	Business 2 zone, and adjoining Business 1 (fringe zone)	10,048m <sup>2</sup>
	Northwood Supa Centa – Radcliffe Road and Main North Road	Business Retail Park Zone	72,000m <sup>2</sup>
	New World – Northwood. 2-8 Mounter Avenue	Environment Court Decision <b>CP45/01</b> sets out that the titles identified above “shall be developed in accordance with the provisions for the Business 1 zone in the Proposed City Plan”. In effect, this means that whilst the zoning of the titles is Living 1, there is a Clayton’s B1 zoning for the site.	10,579m <sup>2</sup>
	752-758 Main North Road	Business 1	2,387m <sup>2</sup>
	1 Waterford Avenue	Environment Court Decision <b>CP45/01</b> in effect provides a Clayton’s B1 zoning for the site.	4,004m <sup>2</sup>

Proposed	Styx Centre – Radcliffe Road	Rural 3 (proposed rezoning to Business 2).	77,800m <sup>2</sup>
	Applefields – Johns Road and Main North Road	Rural 3 (proposed Business 1 as component of section 293 application pursuant to the Resource Management Act 1991.	26,000m <sup>2</sup>
<b>Total</b>			<b>202,818m<sup>2</sup> 20.3 ha</b>

6.17 Based on **Figure 13**, and utilising a conservative ratio of 1:3 for floorspace to total land area. The Belfast area would, should all of the ‘proposed’ commercial areas be developed, have a gross leasable floorspace (‘glfa’) of some **67,605m<sup>2</sup>** associated with some **202,818m<sup>2</sup>** of commercial zoned land.

6.18 The existing residential population for Belfast is 7,641 (Figure 5), and is predicted to grow to some **13,949** resident population by 2026, dependent on the outcome of Variation 4 to Change 1 which would have the effect of reducing the household growth in the immediate Belfast area. By 2041, a resident population of some **15,000** is expected.

6.19 At its most conservative, that is a low leasable floorspace yield (1:3 for floorspace to land area) combined with the high residential yield scenario, the commercial floorspace ratio per person in Belfast would be above 4.5m<sup>2</sup> glfa per person.

$$(202,818\text{m}^2 * 1/3) / 15,000 = 4.5\text{m}^2 \text{ GLFA per person.}$$

6.20 It is considered, given the ‘urban peninsula’ form of Belfast, in that it is somewhat disconnected from Christchurch City, that the floorspace yields of 4.5m<sup>2</sup> per person would be considerable, and clearly not commensurate with the ability of household expenditure in the immediate Belfast area to support such floorspace. At the very least, for these areas to be economically sustainable, the trade area would need to extend considerably beyond Belfast to include areas such as Northlands, Shirley and Redwood, and also potentially Rangiora and Kaiapoi.

#### Summary

- The spatial extent of retail activity in the area is significantly larger than what would be needed to service just the population of Belfast. This is a factor of the large extent of passing trade that is captured by retail activity within Belfast. A good example of this is the location of the New World and Woolworths supermarkets in south Belfast.
- The convenience retail activity provided by the north Belfast shops provide an important role and function to the local community serviced by this centre.

## 7.0 COMMERCIAL CONCLUSIONS

### Population requirements

- 7.1 **Figure 14** links retail centre types with their requirements in terms of supporting land areas and their catchment or surrounding residential population.

**Figure 14: Indicative Floorspace and Land/Population requirements by Centre Type**

Centre Type	Retail Floorspace (m <sup>2</sup> )	Land Area(ha)	Supporting Population
Sub-Regional Centre	25,000 to 50,000	7.5 to 15.0	60,000 to 80,000
District Centre	15,000 to 25,000	4.5 to 7.5	17,000 to 40,000
Supermarket based Neighbourhood Centre	5,000 to 10,000	4.5 to 3.0	12,000 to 15,000
Neighbourhood Centre	2,000 to 5,000	0.6 to 1.5	5,000 to 7,000
Local Centre	Up to 2,000	Up to 0.6	2,000 to 3,000

Source: Modified from Property Economics, 2006

### Christchurch City Plan application

- 7.2 The Christchurch City Plan (**'the Plan'**) provides a reasonably flat commercial centre hierarchy, in that commercial areas are zoned as either: Local Centres (Business 1 zone), District Centres (Business 2 zone), or the Central City (Central City zone).
- 7.3 The **Business 1 zone** purpose<sup>3</sup> states:  
*"These areas are dominated by small scale retail shops and service activities, and many are characterised by "strip" development of shops immediately adjoining road frontages. The Business 1 Zone's purpose is to provide for local opportunities for employment, community activities and convenient (often pedestrian) access to goods and services".*
- 7.4 The proposition for Business 1 zones, is that they provide a convenience role for the adjacent residential catchment, or they act as a fringe area to a larger Business 2 type zoning. Business 1 zones are low order convenience retail centres that service the frequently required 'top up' of goods and services to a local, and adjacent, residential community.
- 7.5 Another key component is that of scale: even the largest Business 1 zones are comparatively small. Typically, Business 1 centres are predominantly smaller than 1.0ha with the majority well below 5,000m<sup>2</sup> in total land area. It is also noted that the cadastral boundaries of even the larger existing Business 1 areas effectively precludes the ability to amalgamate and nucleate a substantial retail node.
- 7.6 According to the City Plan's zone statement, the **Business 2 Zone** has three main purposes. Firstly, it provides for building development of a significant scale and intensity, appropriate to the function of larger district centres and to the amenities of any living environment adjoining the zone. Secondly, the zone identifies the core of business activity within a district centre, particularly with regard to retailing. Thirdly, these centres usually contain important community facilities, whether in public or private ownership. Business 2 zoned District Centres as described in the City Plan, are identified to range in size but usually to be over 5000m<sup>2</sup> total floor space and typically contain a supermarket.<sup>4</sup>

<sup>3</sup> Christchurch City Plan Part 3, Section 1.4 'Business 1 Local Centre / District Centre Fringe Zone purpose'.

<sup>4</sup> Christchurch City Plan - Explanation of Policy 12.7.1.

7.7 Some of the district centres serve a surrounding neighbourhood catchment. These centres are well distributed throughout the suburban areas of the city, and include a number and variety of small retail, community and service activities, and usually include a supermarket. The Business 2 Zone component of these centres identifies the focal point for business activity and development within these centres.

**Application to Belfast**

7.8 Belfast has been identified as an area of long term growth potential, with a total population predicted to reach around 15,000 people<sup>5</sup>. With such likely population growth, and the benefits of passing trade into and out of the City, it is considered essential that a strategy is developed to establish a district centre with clearly defined functions and roles within the Belfast area. The most likely location for such a centre is the Northwood Supa Centa, building upon the existing retail facilities and infrastructure developed at the site. This node already has a floor area of some 34,610m<sup>2</sup> on a site of some 7.2Ha. An additional land area of approximately 3-4ha should provide for the complete long term commercial and social needs of the community in the Belfast area. Any expansion should be aimed at developing more social and convenience activities and speciality comparison offer, and be timed to coincide with population growth in the area.

7.9 The area lends itself to consolidating retail and community facility activity, as a Business 2 zoned area given: the size and functionality of the existing commercial offer; the current absence of a diverse range of small scale retail, social and commercial activities; and subject to potential residential development to the east, south and west of the Belfast settlement.

7.10 With regard to the other indicative living areas and their respective populations<sup>6</sup>, additional local centres of approximately 6-8 shops should be enabled to be developed in conjunction with such residential development at:

- the Applefields / Devondale Block;
- fronting Blakes Road; and
- adjoining Johns Road (once the Western Bypass has been commissioned).

These local centres would provide for the convenience needs once a resident population emerges in this area.

7.11 The overall retail hierarchy for the area is identified in **Figure 15** and illustrated in **Figure 18**.

**Figure 15: Indicative long term retail land requirements**

Centre location	Role in the hierarchy	Land requirements
Belfast North	Local Centre	Already present, but should be rezoned to Business 1.
Applefields / Devondale	Local Centre	5,000m <sup>2</sup>
Blakes Road	Local Centre	5,000m <sup>2</sup>
Johns Road	Local Centre	5,000m <sup>2</sup>
Supa Centa	District Centre	Additional 3ha*
Northwood New World		
<b>Total</b>		<b>Approx 45,000m<sup>2</sup> (4.5ha) land area</b>

\* This area is subject to Plan Change 22 seeking a rezoning 7.8 ha for Business 2 land.

<sup>5</sup> Assuming 260Ha of greenfield development at 15.5 houses per Hectare and a household size of 2.4 persons.

<sup>6</sup> Landuse Scenarios and Population Projections. Belfast Area Plan Technical Paper, 2009.

**Summary**

- Subject to a substantial increase in population size, some consideration should be given to the strategic development of a District Centre adjacent to, and including the Belfast Supa Centa. Such development should encompass a range of social and convenience activities.
- With commissioning of new residential subdivisions, local centres should be enabled at the Applefields / Devondale, Blakes Road, and Johns Road developments. Such local centres should cater towards the convenience needs of the new residents. These should not be of a size that conflicts with the long term consolidation of an expanded Business 2 centre adjacent to the Supa Centa site.
- The Business 2 zoned Belfast North shops should be down-zoned to a Business 1 zoning to reflect the reduced functionality with the loss of the New World Supermarket to the Northwood development.

## 8.0 THE INDUSTRIAL MARKET

### Employment Growth

8.1 In the context of Belfast there are clear limitations projecting likely growth in Industrial FTEs and consequential floorspace requirements:

- Firstly, such projections would not take into account the likely growth anticipated for the area with a projected population reaching approximately 15,000 by 2020.
- Secondly, the development of industrial sites in a number of green field areas of the City is likely to be limited in the future by the Canterbury Regional Council's Natural Resources Regional Plan ('NRRP') and also Change 1 to the Regional Policy Statement. The NRRP prohibits the subdivision and development of land in relation to the Christchurch Groundwater Recharge Zone in order to protect the underlying aquifer system. Change 1 to the Regional Policy Statement limits the extent of new Industrial rezoning in the wider metropolitan area, and also establishes a staging and sequencing policy for land that is released.

### Key factors and constraints for industrial development

8.2 Industrial growth in the Belfast area will be influenced by a number of physical and infrastructural barriers:

8.3 *Noise, hazardous substances and amenity impacts from industry on nearby dwellings*  
Historically industry has been separated from sensitive activities (such as residential, and ecologically sensitive areas) to avoid possible incompatibilities. However, in Belfast the location of the Freezing Works and Tannery precedes such endeavours, and regardless of odour effects is situated in close proximity to residences. A separation of activities is encouraged through the Christchurch City Plan in the form of zoning and regulation. The use of buffer areas such as the roading network, parks and open space and building setbacks can also be utilised to reduce potential impacts from business developments on nearby sensitive residential activities.

8.4 *Protecting the unconfined aquifer*  
With regard to the protection of the unconfined aquifer, it would be appropriate that any new industrial activities or land uses that involve contaminants that pose a significant risk to groundwater should not be located within the Christchurch groundwater aquifer recharge zone. There is a limited amount of confined aquifer within the Christchurch area, with the majority being located around the wider Belfast – Marshland area. **Figure 16** indicates the location of the unconfined aquifer in relation to Christchurch City. This makes industrial development in Belfast an attractive option in absorbing the need for such activity within the wider Christchurch City.

8.5 *Infrastructural Servicing*  
Industrial activity in the metropolitan area will be restricted where there is not the adequate supply of water, waste discharge and power. The Kainga/Chaney's area is an example of this within Belfast, where there is little demand for business development given the lack of servicing available. Infrastructure supply and cost sharing will need to be established well in advance of expanding or developing new locations for industrial development.

8.6 *Aircraft Noise*  
It is generally considered that whilst noise sensitive uses such as residential development will be inappropriate within the 50dBA noise contour boundary<sup>7</sup>, it is arguable that business activities may well be suitable within this location. **Figure 16** illustrates the Airport noise contours in relation to Christchurch City as remodelled as consequence of Variation 4 to Change 1 to the Regional Policy Statement.

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<sup>7</sup> Refer C60/2004 *Robinsons Bay Trust et al vs Christchurch City Council*



*Transport*

8.7 Transportation links and efficient access are two of the key drivers in terms of business location. One of the main deterrents for increased demand for business land in Belfast is the current transportation network in the area. Belfast industrial areas are accessible to the Christchurch International Airport, destinations to the north of the South Island and to a lesser extent the Port of Lyttleton via the arterial and State Highway network. However, the current levels of service in terms of congestion and network layout act as a disincentive for business establishment when compared to more accessible areas of the City such as Hornby and Sockburn.

8.8 Currently under investigation is the development of a northern roading bypass to the east of the Belfast settlement. Plans illustrate that the connection would link from an overbridge with State Highway 1 at Chaney's to Prestons Road, with a current estimated time for completion in 2016 / 2017. Also under consideration is the Western Belfast Bypass. Whilst a preferred route is to be evaluated by New Zealand Transport Agency ('NZTA'), the bypass is likely to connect Johns Road at Rosebank through to State Highway 1 at Chaney's. There is no timetable associated with this proposed western bypass, although it is noted that the route through Rosebank has been future proofed through shared City Council / Transit ownership. The operation of one or both of these proposed routes are imperative for the growth of large manufacturers who rely on good access to shift goods and materials. At present businesses in the area must contend with traffic congestion at peak commuting times, and also the navigation of heavy goods through more urban streets.

*Access to labour*

8.9 The historical workforce of Belfast has traditionally been based on relatively unskilled labour in order to support the manufacturing industries of the area. The main employer then, as now, is the freezing work operations by PPCS. Recent subdivisions in the area are generally attracting those residents that work in more skilled occupations, which are likely to be currently located within the CBD.

8.10 A future consideration for this area will be access to unskilled labour in order to drive the existing and ongoing manufacturing employment base of the area. The location of new industrial activity in close proximity to affordable housing growth areas is necessary to maintain an accessible labour supply.

**Summary**

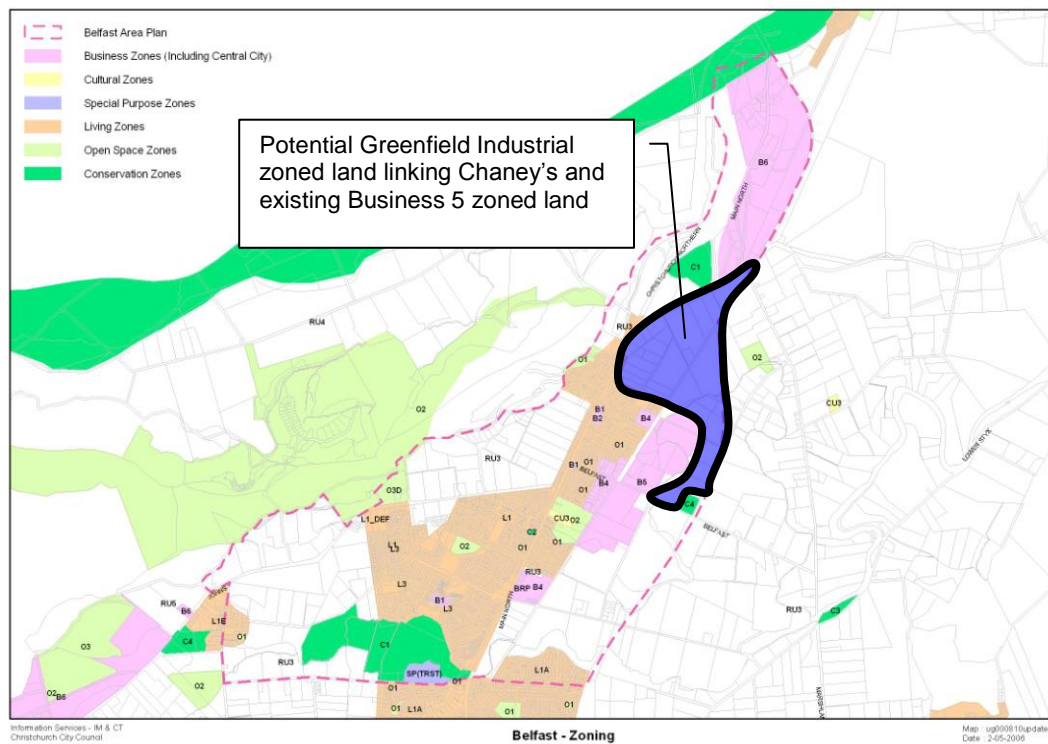
- The north east of Belfast is not located on the unconfined aquifer, which makes industrial development in this area an attractive proposition.
- There are a range of variables including reverse sensitivity, access to labour and accessibility which will need to be incorporated in any decisions to rezone areas within Belfast to facilitate industrial development.



## 9.0 INDUSTRIAL CONCLUSIONS

- 9.1 The work undertaken by Property Economics in relation to the Greater Christchurch Urban Development Strategy ('GC-UDS') Industrial Strategy illustrates that there will be modest demand for industrial land in wider metropolitan Christchurch area in the short to long term, due to the globalisation of manufacturing activity, increased densities of industrial employment, and a shift in growth to commercial and service sectors. This is currently at odds to the current uptake of industrial land at some 24ha per annum. The predicted drop in land demand is to coincide with the predicted long term drop in growth of industrial FTE's. It also coincides with remediation by the Christchurch City Council of the lack of regulation during 1999 to 2004 which allowed for a significant number of non-industrial activities to occupy industrially zoned land.
- 9.2 There are a number of variables that would need to be taken into consideration in modelling the likely extent of future demand for industrial land in the Belfast area. These would include, but are not limited to:
- Projected growth in FTE's as dependent on predicted growth in residents in the area;
  - Land supply constraints for industrial development in the City through regulation protecting the aquifer;
  - Localised impediments to Industrial development such as contamination; and
  - The impact that the provision of infrastructure services and an improved highway network in the area would have on industrial land demand in Belfast.
- 9.3 The Belfast Infrastructure report incorporates an assessment of the provision of sewage / water to part of the Kainga / Chaney's Business 6 zoned land. However, for this to be efficiently supplied from Belfast, those rural areas between the existing PPCS Freezing Works (Business 5) and Kainga / Chaney's (Business 6) would also need to be developed for industrial activity, and an appropriate cost share arrangement for funding the infrastructure established.
- 9.4 Based on the existing land tenure and zoning, as well as the influencing factors identified above, the preference for greenfields industrial land would be adjacent to the proposed Northern Bypass, and to the north west of the existing PPCS freezing works. This site is not within the Christchurch Groundwater Recharge Zone 1 and so is not subject to the NRRP prohibitions. Such a node would also need to provide an infrastructure link from the existing industrially zoned areas of Belfast to the Chaney's / Kainga Business 6 zoned.
- 9.5 **Figure 17** illustrates a potential area to create such a node. This would result in approximately 90 ha of industrial land being released over time onto the market, but would be dependent on the provision of infrastructure to the area, and the operation of at least the Northern Bypass to facilitate demand.
- 9.6 It is noted that the 90 ha figure is based on giving effect to the following factors:
- the long term desire to efficiently provide servicing to the B6 area at Kainga / Chaney's, as currently proposed by the Regional Council's 2007/2008 plans to service their land holdings within this area;
  - providing an employment node to match residential growth in the area; and
  - to provide an industrial land supply for the City given the constraint on industrial growth within Christchurch as imposed through the Regional Council's NRRP policy for aquifer protection.

**Figure 17: Indicative Industrial Zoned land**



**Summary**

- Based on providing for the City's long term industrial sector growth on areas that are not part of the unconfined aquifer, approximately 90Ha of industrial land should be provided over time in the Belfast area to meet demand.
- The capacity of servicing the Chaney's block in conjunction with the Environment Canterbury decision to fund servicing should also be carefully considered in the release and quantum of serviced industrial land provided.

## 10.0 CONCLUSION AND SUMMARY

- 10.1 There is currently an imbalance between the occupations of those that reside in Belfast and the occupations available within the area, leading to a net influx of manufacturing workers and migration of office employees. Whilst the range of occupations of residents in the area is diverse and incorporates the full spectrum from manufacturing to commercial activities, manufacturing predominantly represents the primary employment sector within the area. It is noted that operation of the Northwood Supa Centa and New World has increased employment opportunities in the area in relation to retail trade.
- 10.2 Emerging considerations within the Belfast area in terms of factors influencing business land supply and demand include:
- That the development of high socio-economic residential areas would make the area a less attractive location for industrial activity due to labour force accessibility issues, or that the transport implications of commuters would need to be acknowledged and accommodated within the transport network;
  - Long term provision for industrial land in the City is likely to fall to pockets within south west Christchurch and Belfast. This is due primarily to other greenfield areas being foreclosed through the protection of the City's groundwater aquifers;
  - That the highest and best use often prevails in land development, with high end residential activity being generally more profitable than industrial development;
  - Demand for industrial developments within the area is likely to be very closely linked with infrastructure supply and highway construction. It is unlikely that take up rates in Belfast will increase unless land is serviced by infrastructure and either the Northern or Western bypasses are constructed to improve accessibility;
  - Retail, commercial and leisure facilities should be consolidated around an extended Supa Centa node. This would provide opportunities for retail, professional services and leisure employment opportunities, but should be subject to an expanded residential base in the wider Belfast area.
- 10.3 **Figure 18** represents an indicative land supply for the range of business activities that could be established by 2020. This includes some 4.5 ha of additional commercial land, and approximately 90 ha of land to support industrial activities in Belfast. It is noted that the industrial land figure is based on the long term provision of an industrial land resource within Christchurch, and access improvements through the implementation of Transit's 10 year programme which includes the development of the Northern Arterial by 2016/17, and the Western Belfast Bypass shortly thereafter. As stated earlier, modelling of exact land demands should be undertaken before servicing and rezoning is undertaken.

Figure 18 : Indicative business and Industrial land supply at peak population (2041)

