GROWTH MANAGEMENT PROGRAM

LAND SUPPLY REPORT FOR GREATER ADELAIDE

Part 1: Greenfield

Published June 2021

Government of South Australia
Attorney-General's Department




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1. GREENFIELD LAND SUPPLY OVERVIEW

This section summarises the allotment potential from the identified Greenfield land supply, and the estimated dwelling requirement from this land to 2030. It includes; the Outer North, Outer South, Adelaide Hills, Fleurieu, Murray Bridge, and the Northern Plains and Barossa regions where the Greenfield land supply is located.

1.1 Greenfield land supply

The Greenfield land supply across Greater Adelaide includes:

- broadhectare land in existing residential zones; and
- broadhectare land identified for future urban growth in *The 30-Year Plan for Greater Adelaide - 2017 Update*.

To enable a more detailed analysis of the potentially available supply, the land in existing residential zones has been split into two categories (Development Ready and Undeveloped Zoned) (refer Table 1). The key difference between the two categories is that the Development Ready supply has a proposed or approved land sub division plan lodged over the land.

Table 1: Greenfield Land Definitions

DEVELOPMENT STATUS	ZONING	DEFINITION
Development Ready	Residential	Zoned land greater than 4,000sqm with an approved or proposed plan of division.
Undeveloped Zoned	Residential	Zoned land greater than 4,000sqm with no active plan of division.
Future Urban Growth Area	Deferred Urban, Rural	Land not currently zoned but identified for future urban growth in *The 30 Year Plan for Greater Adelaide - 2017 Update* as Growth Area.

Table 2 summarises the estimated allotment potential available from all identified broadhectare Greenfield and Township land by its current development status and by region, as of June 2020.

The potential yields from both the Undeveloped Zoned and Future Urban growth areas were estimated using the gross dwelling yields achieved in active Greenfield developments within the region, or where specified by a strategic plan[1]. As an example, in the City of Onkaparinga, the gross yield from Greenfield land in 2019 was 14 lots per hectare[2] which has been applied to the stock of Greenfield land in Onkaparinga to estimate the future allotment potential.

The amount of Development Ready and Undeveloped Zoned Greenfield land for each region will be reviewed with each future iteration of the Land Supply Report (LSR).

[1] Note: the estimated potential number of allotments from the identified Greenfield land supply has not been discounted to account for land converted to other uses or land that is withheld from development for a range of reasons.

[2] 2019 Broadhectare land supply report

Table 2: Greenfield and Township lot supply by region (actual and estimated lots), June 2020

REGION	DEVELOPMENT READY	UNDEVELOPED ZONED	FUTURE URBAN GROWTH	TOTAL	VACANT LOTS (June 2020)
Outer North	12,400	33,900 *	20,100 *	**66,400 ***	1,300
Outer South	1,800	2,400 *	4,900 *	**9,100 ***	600
Adelaide Hills	4,400	8,600 *	400 *	**13,400 ***	1,200
Fleurieu	2,100	5,400 *	13,800 *	**21,300 ***	2,400
Murray Bridge	500	5,800 *	4,400 *	**10,700 ***	400
Northern Plains & Barossa	1,200	3,500 *	400 *	**5,100 ***	1,000
TOTAL	**22,400**	**59,600 ***	**44,000 ***	**126,000***	**6,900**

* estimated lots

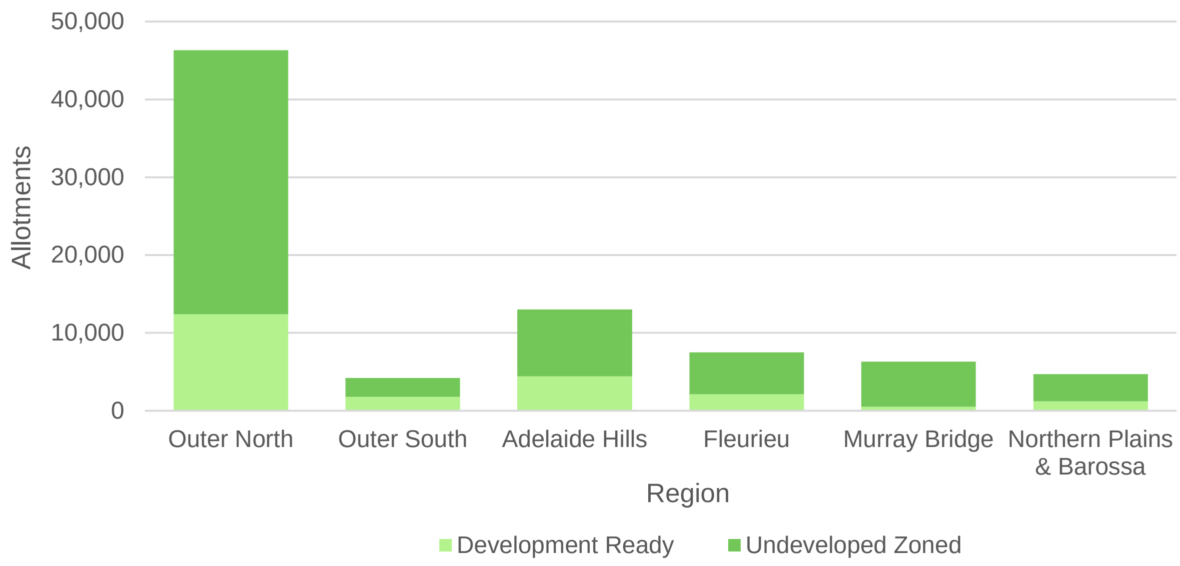
In addition to the estimated allotment potential from Greenfield land, established vacant residential allotments provide another source of supply. However these allotments have been excluded from the land supply analysis for the following reasons:

- they are a part of an active Greenfield development project and already have a dwelling under construction or are awaiting development approval;
- they are being held as a longer term investment; and
- they are located in regional townships and there is no certainty about future availability for development.

Figure 1 displays the estimated allotment potential from the residential zoned Greenfield land (Development Ready and Undeveloped Zoned) by region. The Outer North has the largest supply with an estimated potential for just over 45,000 allotments (12,400 are considered to be Development Ready at June 2020).

The Outer South has the least supply with an estimated potential for just 4,200 allotments, with only 1,800 considered as Development Ready.

Figure 1: Zoned Greenfield allotment potential by region, June 2020



The Adelaide Hills region has the potential to supply 13,000 lots from the zoned Greenfield land (4,400 lots have been classified Development Ready). Mount Barker alone contributes almost 10,700 lots to the overall supply in this region.

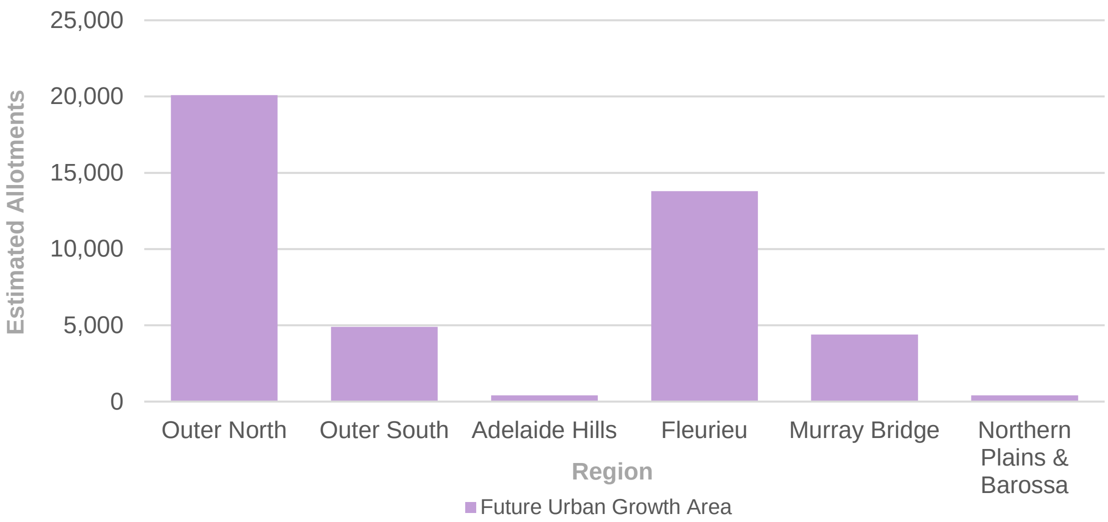
The Fleurieu region has the third largest estimated potential supply from Greenfield land, with the majority located within the townships of Goolwa, Victor Harbor and Strathalbyn.

In addition to the allotment potential from the zoned Greenfield supply, there is land identified for future urban growth that requires rezoning before development can occur. Figure 2 shows the estimated allotment potential from this land for each region. The Outer North has the most significant potential supply of approximately 20,100 lots, with 10,000 lots of these within the Concordia growth area.

In the Outer South, the estimated potential supply from Future Urban growth area land is approximately 4,900 lots (Aldinga, Hackham and Sellicks Beach).

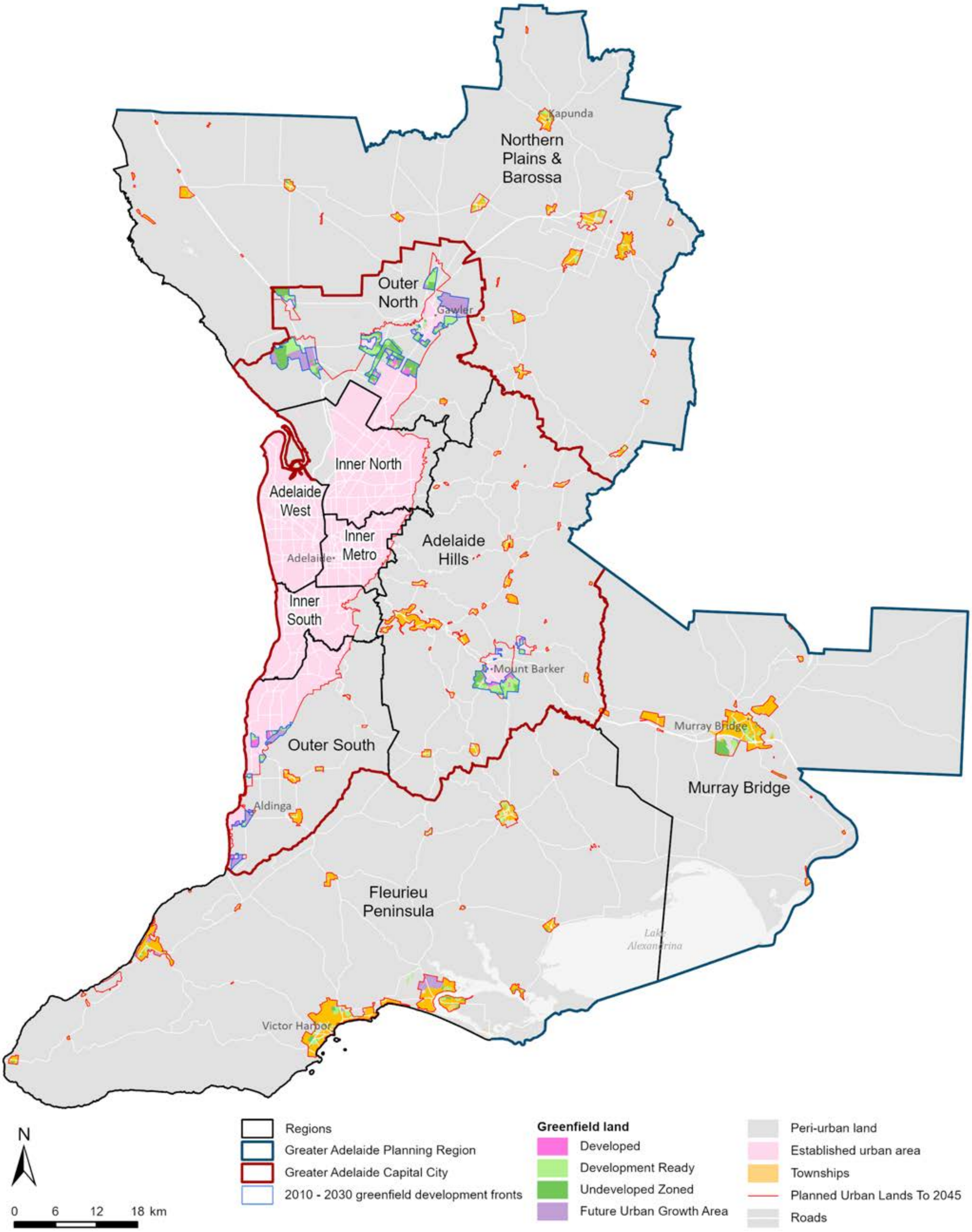
Identified Future Urban land supply in most townships is limited, except for the major Fleurieu Peninsula townships like Goolwa, Victor Harbor and to a lesser extent Strathalbyn.

Figure 2: Future Urban growth area allotment potential by region



Locations of the Greenfield, Township and Future Urban growth area land are shown in Figure 3.

Figure 3: LSR Greenfield land supply



1.2 Greenfield land demand

The estimated future dwelling requirement for each region is based on the projections of future population growth[3], and the projected development share (in this case Greenfield and Township).

Table 3 summarises the estimated dwelling requirement from Greenfield land by region, for both a medium and a high growth scenario. The estimated dwelling requirement from Greenfield land in metropolitan Adelaide to 2030 is in the order of 20,400 dwellings for the medium growth scenario. This represents around 32% of the total dwelling requirement for Greater Adelaide. For the high growth scenario, the estimated future dwelling requirement from Greenfield is estimated to be around 28,400 dwellings.

Table 3: Greenfield and Township dwelling demand by region

REGION	ESTIMATED DWELLING REQUIREMENT	
	Medium growth scenario	High growth scenario
Outer North	9,400	13,000
Outer South	2,800	4,100
Adelaide Hills	2,500	3,400
Fleurieu	3,700	4,700
Murray Bridge	900	1,300
Northern Plains & Barossa	1,100	1,900
TOTAL	**20,400**	**28,400**

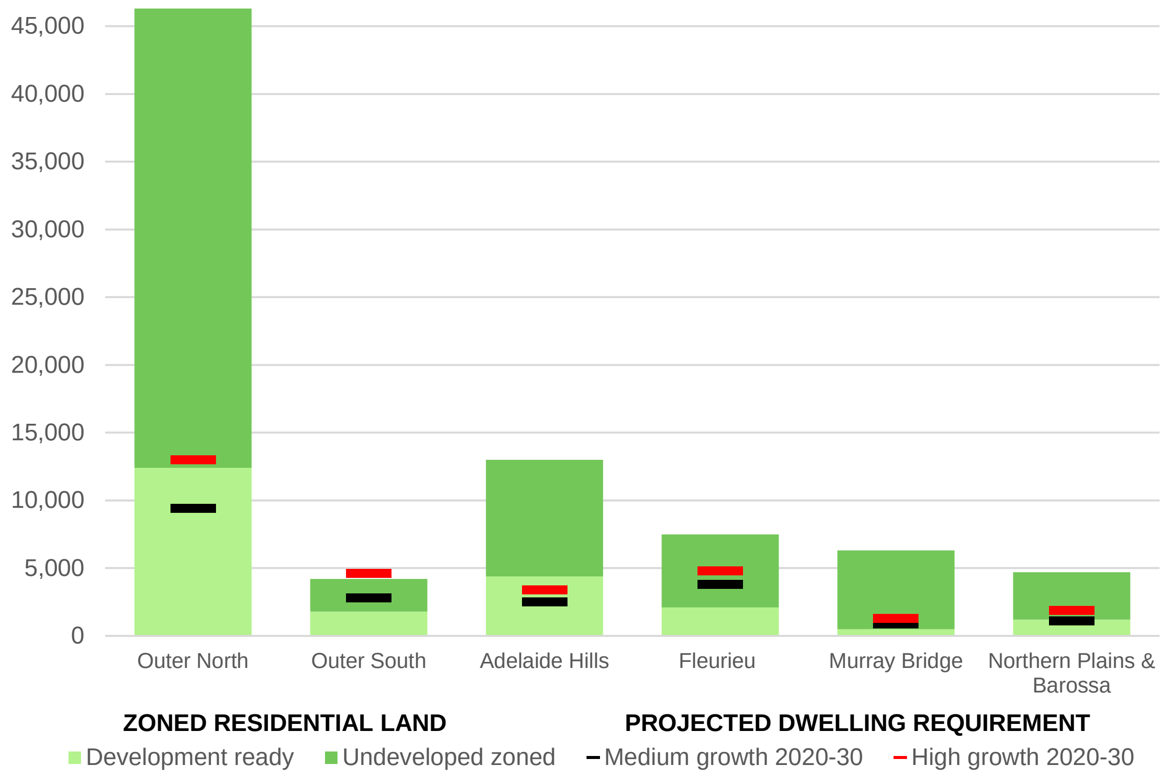
1.3 Greenfield supply and demand balance

The estimated total potential allotment supply from zoned Greenfield land, and the projected dwelling requirement (medium and high) from Greenfield land over the next 10 years (2020 to 2030) is presented in Figure 4. The chart shows the following:

- The significant allotment potential relative to projected demand in the Outer North. The total allotment potential from zoned Greenfield land is over 56% on the total potential for Greater Adelaide.
- The limited allotment potential relative to projected demand in the Outer South.
- The relatively small amount of Development Ready land across the Fleurieu region relative to projected demand.

[3] DPTI Population Projections, 2019

Figure 4: Estimated Greenfield allotment potential and projected dwelling requirement, 2020 -2030



Therefore, when analysing the capacity of available land supply within Greater Adelaide to accommodate projected dwelling growth over the next 10 years, in aggregate, there is more than sufficient zoned and identified future urban land to manage projected dwelling growth.

1.4 Region analysis

The following sections of the report present a detailed summary of the amount and location of identified Greenfield and Township land for each region. Along with supply, the estimated future dwelling requirement in the following regions is considered, based on recent development trends over the last 10 years:

- Outer North
- Outer South
- Adelaide Hills
- Fleurieu Peninsula
- Murray Bridge
- Northern Plains & Barossa

Greenfield and Township development and land supply is also shown at a precinct or township level to provide more detailed information.

2. GREENFIELD LAND SUPPLY - OUTER NORTH

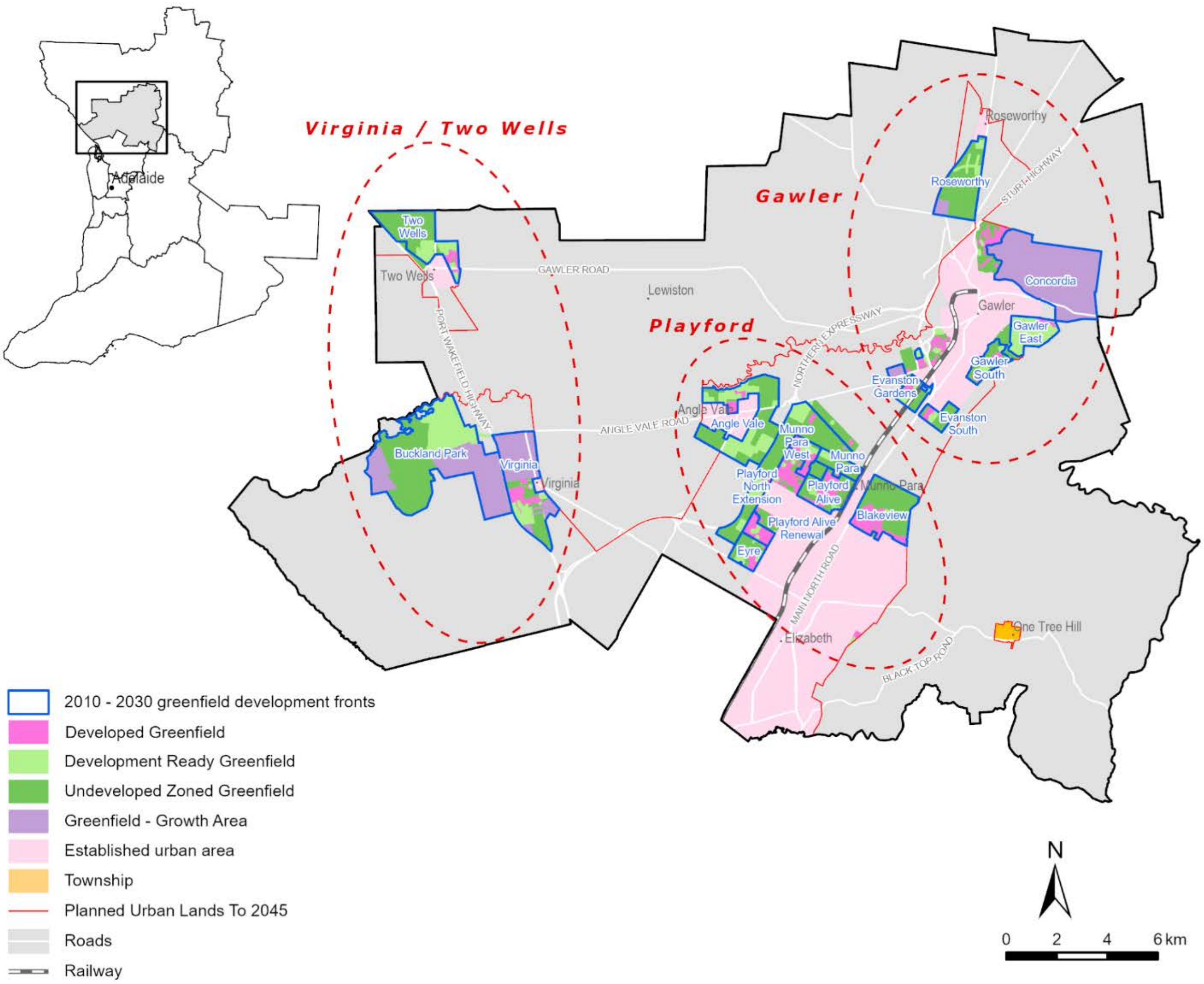
2.1 Overview

Residential land supply in the Outer North region is predominantly Greenfield land which is spread across a significant geographical area.

Key facts about the region include:

- It contains the Local Government Areas (LGA's) of Gawler, Playford, Light Regional (in part) and Adelaide Plains (in part).
- It has the largest stock of Greenfield land for residential purposes, when compared to all other regions.
- Given the complexity and geographical size of the region, three sub-regions have been created, as illustrated in Figure 5.
- Within these sub-regions there are 17 active residential development fronts and, in some cases, multiple estates within each development front.

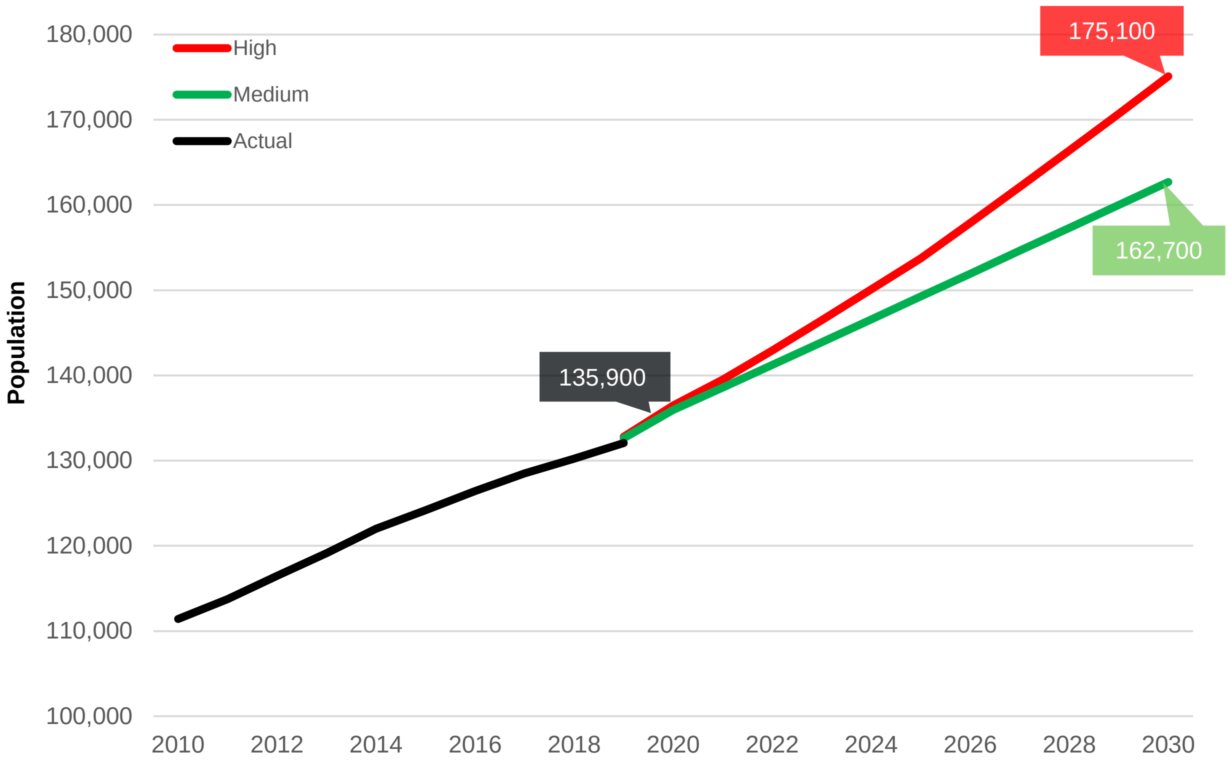
Figure 5: Outer North region geography and sub-regions



Population

- Between 2010 and 2019 the region grew by 20,650 persons, at an average annual rate of 1.8%.
- In 2020 the projected population for the region is 135,900.
- Figure 6 shows actual growth to 2019, and the projected growth from 2020 to 2030 under both a medium and a high growth scenario.

Figure 6: Population growth 2010 – 2030



Housing demand

- Between 2010 and June 2020 a total of 11,500 dwellings were constructed.
- Under a medium growth scenario there is an estimated requirement for 12,000 additional dwellings between 2020 and 2030, with 9,400 to be built on Greenfield land.
- Under a high growth scenario there is an estimated requirement for 16,400 additional dwellings between 2020 and 2030, with 13,000 to be built on Greenfield land.

Land supply

At June 2020:

- there were 13,300 Development Ready Greenfield allotments; and
- potential for an estimated 36,200 allotments from Undeveloped Zoned Greenfield land.

2.2 Recent development trends, 2010 – 2019

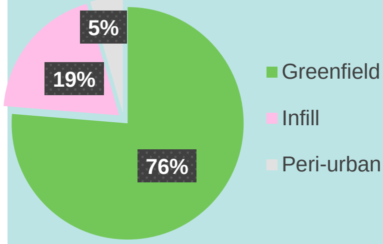
DWELLINGS BUILT

11,300 (gross)

10,800 (net)

1,080p.a (average)

DEVELOPMENT TYPE



DWELLING TYPE

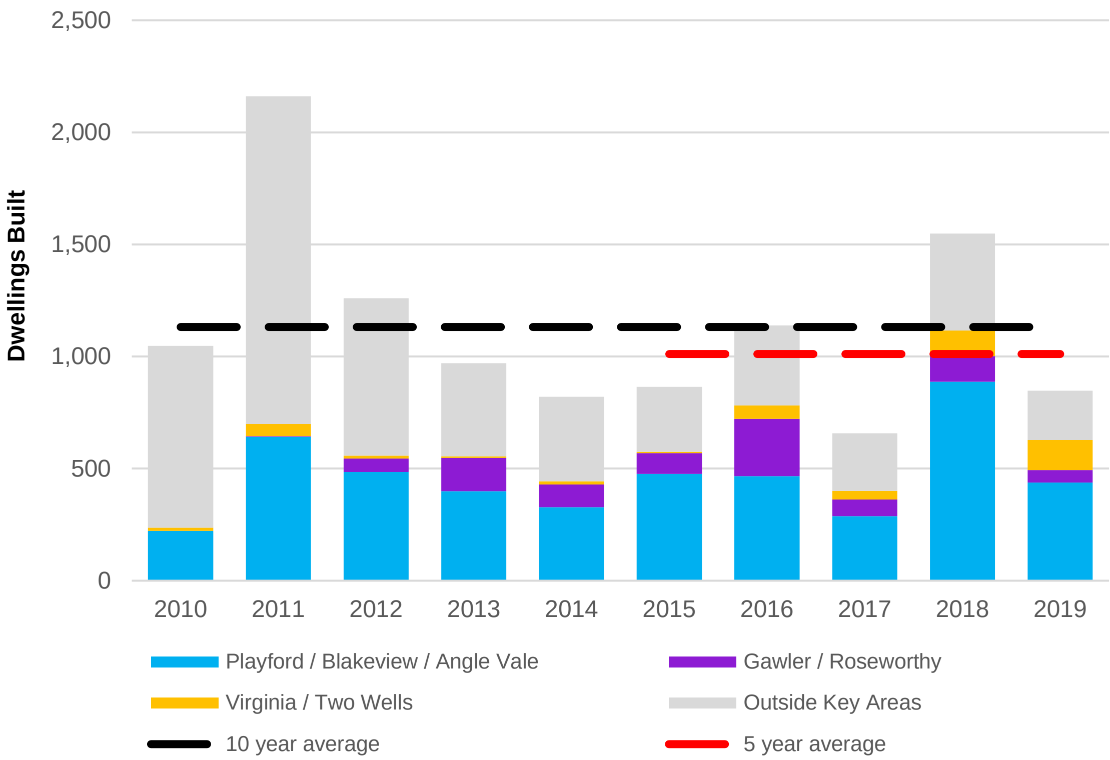
91% Detached

4% Unit / Townhouse

Over the period the following development trends have emerged within the region:

- A total 11,300 dwellings were completed, for a net gain of 10,800 dwellings once demolitions were accounted for.
- Detached dwellings accounted for 91% of all dwellings built.
- Dwelling completions peaked in 2011 with over 2,100 dwellings, as shown in Figure 7.
- Greenfield development accounted for 76% of total dwellings built.
- The four suburbs of Blakeview, Munno Para West, Munno Para and Andrews Farm accounted for 50% of total dwellings built within the region.
- The Playford sub-region contributed 80% of total Greenfield development with more dwellings built in Andrews Farm and Blakes Crossing estates than the sub-regions of Gawler and Virginia / Two Wells combined.

Figure 7: Gross number of dwellings built by year, 2010-2019



2.3 Future demand, 2020 – 2030

POPULATION CHANGE

26,800 (medium)
2,700p.a

38,600 (high)
3,860p.a

TOTAL DWELLING DEMAND

12,000 (medium)
16,400 (high)

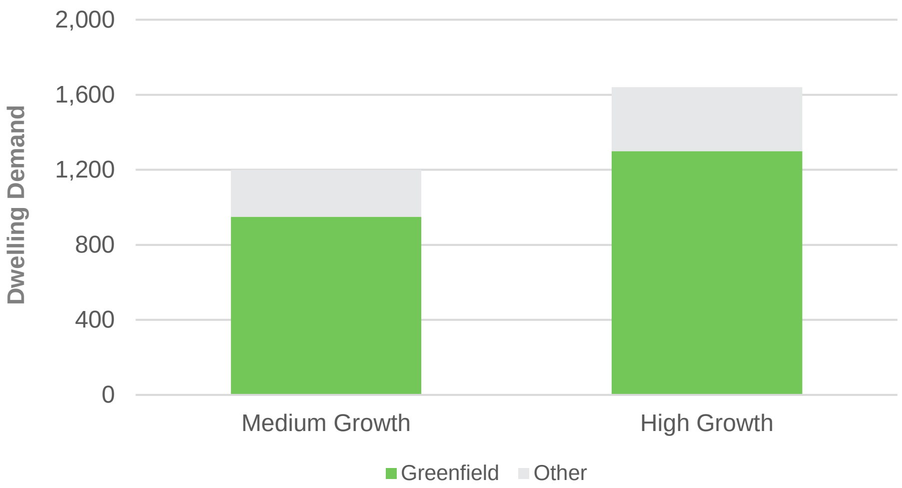
GREENFIELD DWELLING DEMAND

9,500 (medium)
13,000 (high)

The report provides a medium and a high growth scenario for both projected population and dwelling demand. This has been prepared to assist strategic and infrastructure planning at a Local and State Government level because decision and policy makers must be cognisant of the impacts both scenarios are likely to have on future demand for land, services and critical infrastructure.

Projected population growth and average dwelling size were used to estimate dwelling demand for a medium and high growth scenario, as shown in Figure 8.

Figure 8: Projected annual dwelling demand to 2030



Analysis of these projections indicates that:

- Under a medium growth scenario an additional 950 dwellings per annum would be required from Greenfield development to accommodate projected demand.
- Under a high growth scenario an additional 1,300 dwellings per annum would be required from Greenfield development to accommodate projected growth.

2.4 Greenfield land supply to 2030

DEVELOPMENT READY	UNDEVELOPED ZONED	FUTURE URBAN GROWTH
12,400 lots	**33,900** Estimated lots	**20,100** Estimated lots

Over the last decade Greenfield development has accounted for 80% of all dwellings built in the region. This trend is assumed to continue into the next decade as additional land comes to the market and major infrastructure projects make land more accessible and desirable to a larger portion of the market.

A stocktake of Greenfield land supply within the region is illustrated in Figure 9 and Table 4, and shows the following:

- 19% of land supply is Development Ready.
- Over 5,400 Development Ready allotments are located within the Playford sub-region, with just under half these allotments located within the Angle Vale precinct.
- Over 50% of estimated allotment potential is located within Undeveloped Zoned land.
- It is estimated that undeveloped zoned land within the Playford sub-region could yield in excess of 20,000 allotments. The Playford North Extension will account for approximately 6,000 of these allotments.
- Future Urban Growth area land is estimated to yield 30% of total allotment potential for the region with land at Concordia estimated to have a total potential to create 10,000 allotments.

Figure 9: Greenfield land supply by development front, June 2020

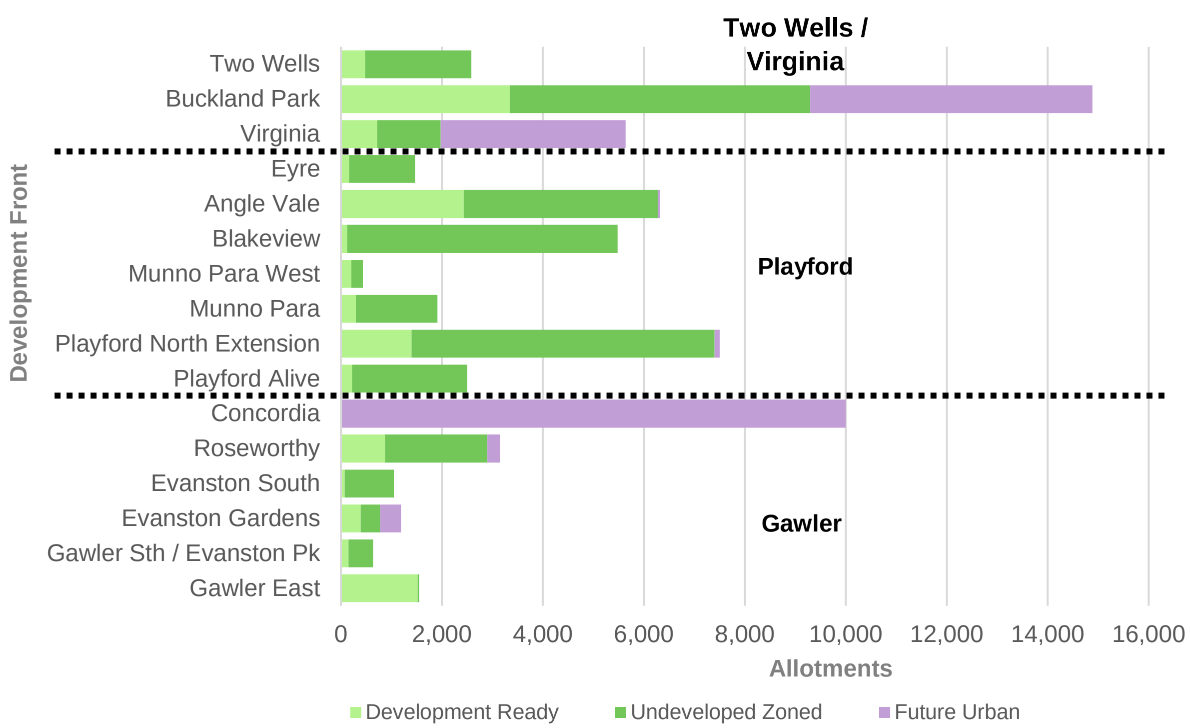


Table 4: Greenfield land supply by sub-region and key development front - Outer North, June 2020

STATUS	DEVELOPMENT READY		UNDEVELOPED ZONED		FUTURE URBAN GROWTH AREA	
Sub Region & Development Fronts	**Area (ha)**	**Lots**	**Area (ha)**	**Estimated Lots**	**Area (ha)**	**Estimated Lots**
GAWLER						
Gawler East	180	1,521	3	29	-	-
Gawler South	18	151	58	490	-	-
Evanston Gardens	41	391	40	388	43	410
Evanston South	4	75	57	973	-	-
Roseworthy	102	871	237	2,030	29	248
Concordia	-	-	-	-	949	10,000
TOTAL	**345**	**3,009**	**396**	**3,910**	**1,021**	**10,658**
PLAYFORD						
Playford Alive	10	221	101	2,278	-	-
Playford North Extension	96	1,402	409	5,996	7	107
Munno Para	16	295	89	1,615	-	-
Munno Para West	13	205	15	234		-
Blakeview	7	123	289	5,360	-	-
Angle Vale	198	2,431	314	3,848	3	36
Eyre	10	165	82	1,305	-	-
TOTAL	**350**	**4,842**	**1,299**	**20,635**	**10**	**143**
VIRGINIA/TWO WELLS						
Virginia	59	723	103	1,250	301	3,663
Buckland Park	315	3,344	560	5,953	526	5,587
Two Wells	62	478	273	2,108	-	-
TOTAL	**436**	**4,545**	**936**	**9,312**	**827**	**9,250**
OUTER NORTH TOTAL	**1,131**	**12,396**	**2,631**	**33,857**	**1,858**	**20,051**

2.5 Key Greenfield development fronts

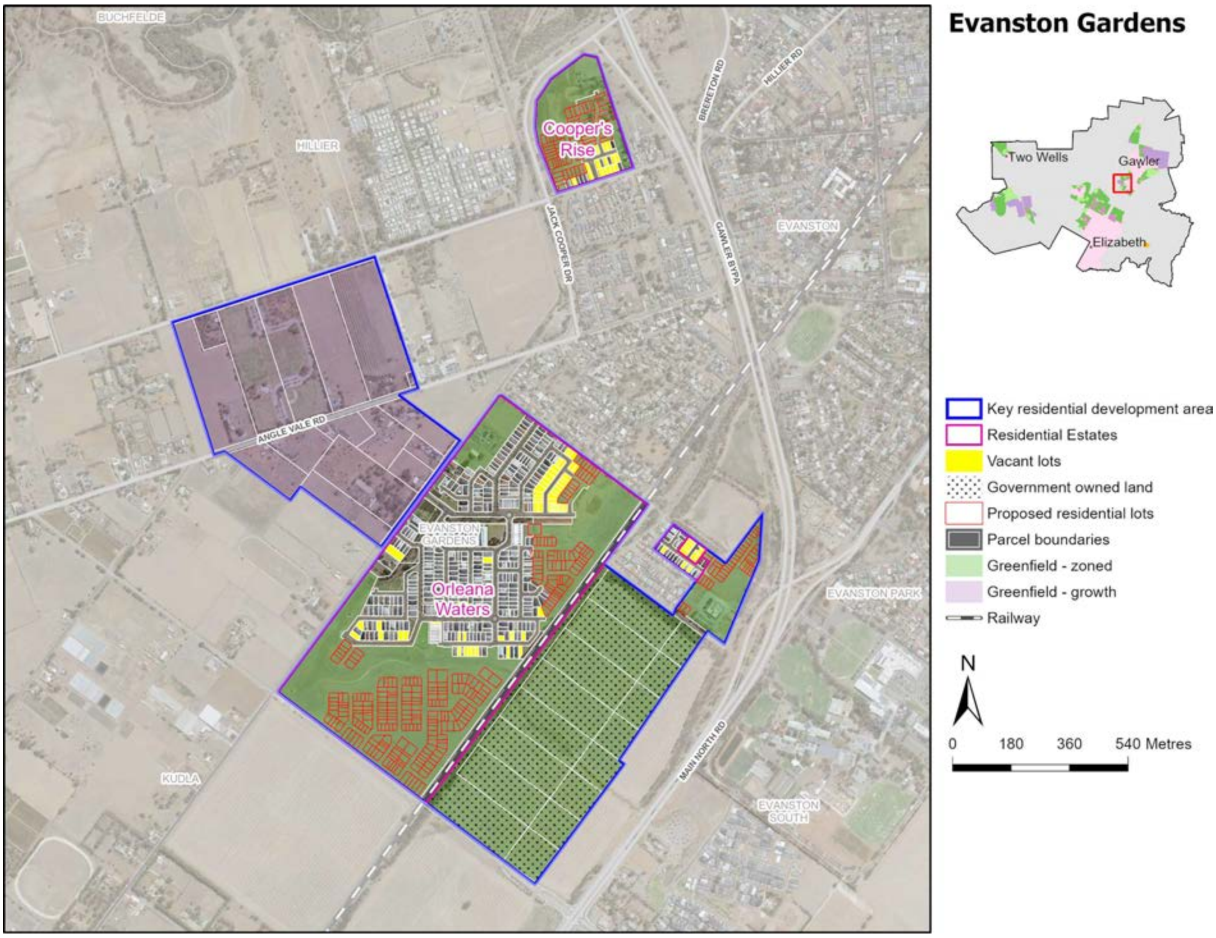
The following section provides analysis on Greenfield development and land supply in the region for the following precincts:

- Evanston Gardens
- Evanston South
- Gawler East
- Gawler South
- Roseworthy
- Concordia
- Angle Vale
- Blakeview
- Eyre
- Munno Para
- Munno Para West
- Playford Alive
- Playford North Extension
- Two Wells
- Virginia
- Buckland Park

Analysis of each precinct includes:

- A map that illustrates the full extent of the precinct, the key residential estates, vacant land supply (as of June 2020), proposed lots (June 2020) and land supply sources (Undeveloped Zoned and Future Urban Growth Area);
- A table summarising key measures, including total number of dwellings built to June 2020, and a breakdown of available land supply as at June 2020, by the following categories:
    - Vacant lots
    - Development Ready (proposed lots)
    - Undeveloped Zoned (estimated yield)
    - Future Urban Growth Area (estimated yield)
- Overview of development trends, land supply and infrastructure.

Figure 10: Evanston Gardens



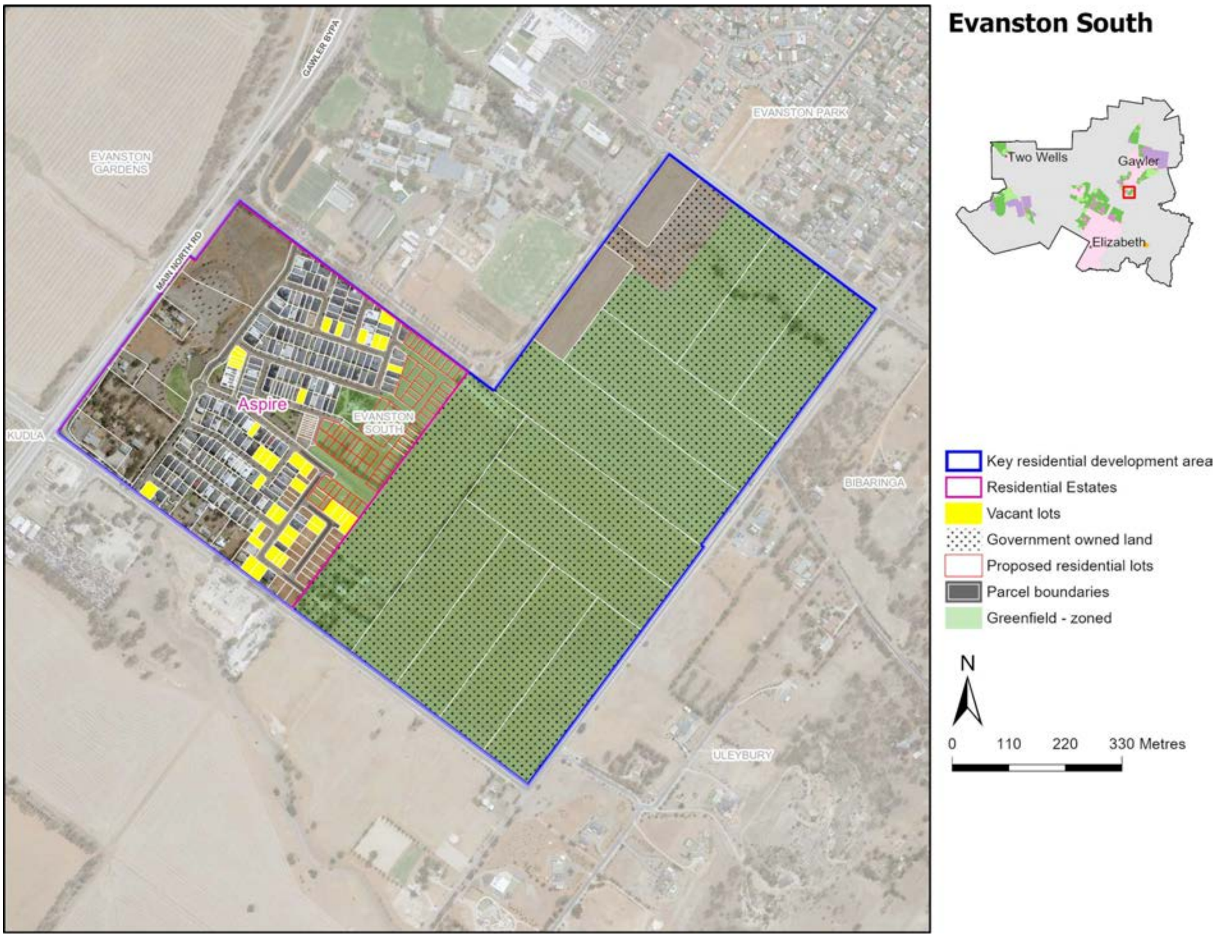
KEY MEASURES

Year Commenced	2011
Estimated dwelling potential	1,699
Dwellings built since 2010	419
Average dwellings built per annum	54
Remaining Potential Capacity	**1,280**
Vacant lots	89
Development Ready (proposed lots)	391
Undeveloped Zoned	388
Future Urban growth area	410

ANALYSIS

- Orleana Waters is the most significant estate having commenced in 2011 with a potential for 900 dwellings.
- Additional Undeveloped Zoned land on the eastern side of the Adelaide to Gawler rail line, is owned by Renewal SA and could be brought to market to accommodate future growth. This land is estimated to yield a further 388 allotments.
- A further 43ha of Future Urban growth area land is located to the north-west, which is estimated to yield a future 410 allotments.

Figure 11: Evanston South



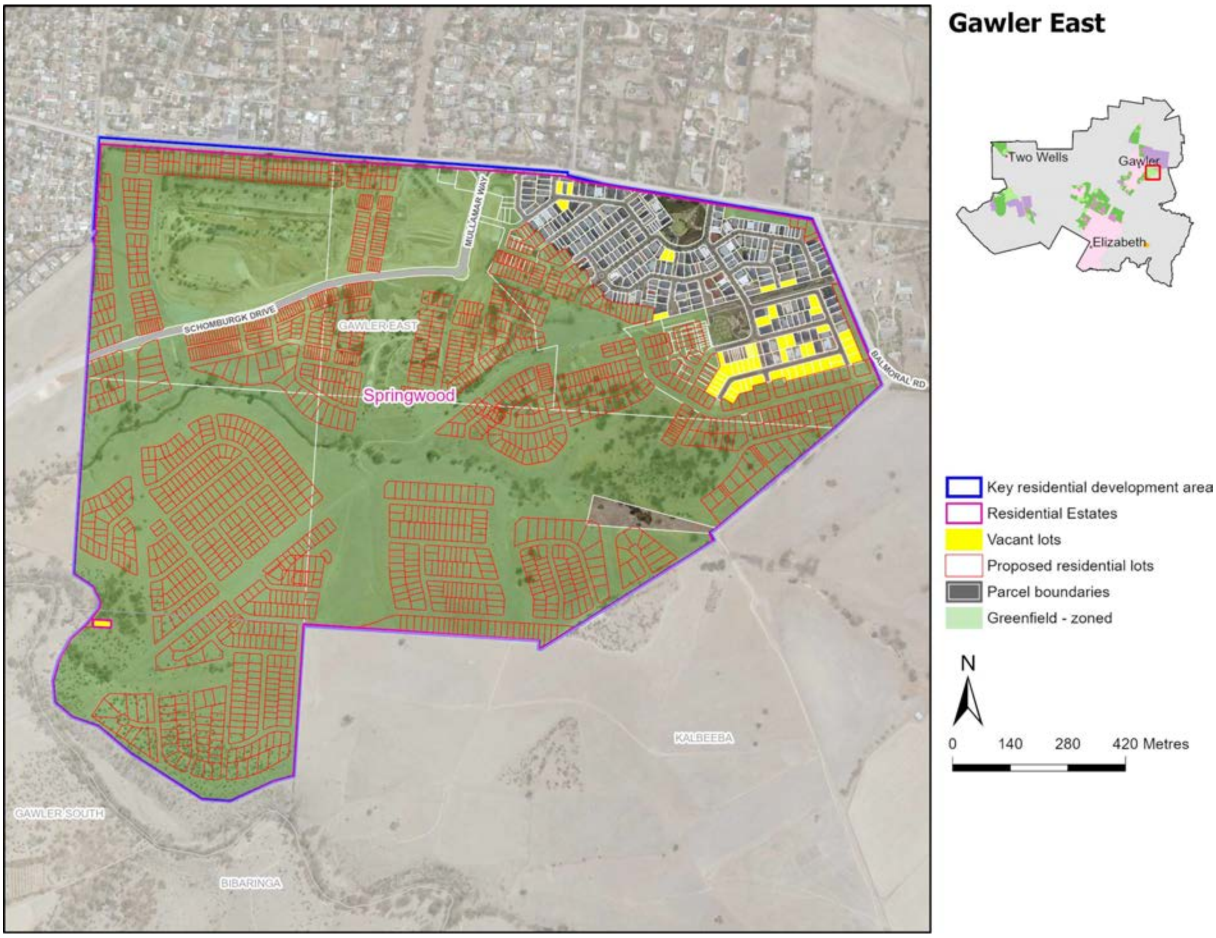
KEY MEASURES

Year Commenced	**2012**
Estimated dwelling capacity	1,285
Dwellings built since 2010	197
Average dwellings built per annum	23
Remaining Potential Capacity	**1,088**
Vacant lots	38
Development Ready (proposed lots)	75
Undeveloped Zoned	973

ANALYSIS

- The Aspire development commenced in 2012 and has produced 197 dwellings at an average rate of 23 per annum.
- Based current consumption rates the Aspire development would be fully developed within the next 3 years.
- An additional 57ha of Undeveloped Zoned land sits to the east, which is owned by Renewal SA, and has an estimated potential for an further 973 allotments.

Figure 12: Gawler East



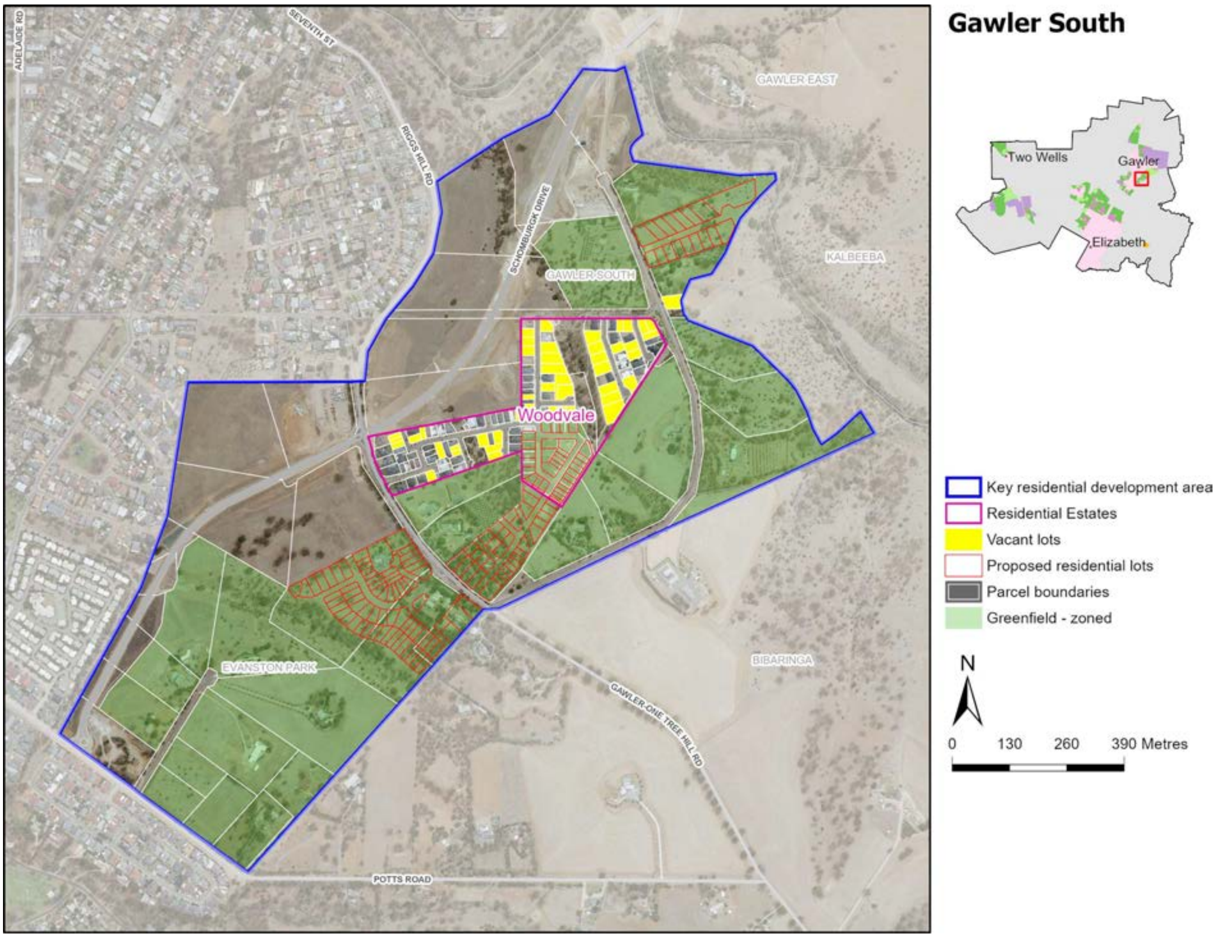
KEY MEASURES

Year Commenced	**2012**
Estimated dwelling capacity	1,844
Dwellings built since 2010	239
Average dwellings built per annum	28
Remaining Potential Capacity	**1,605**
Vacant lots	54
Development Ready (proposed lots)	1,521
Undeveloped Zoned	29

ANALYSIS

- The Springwood Estate at Gawler East commenced in 2012 and, on average, has produced 28 dwellings per annum.
- An expansion of the existing development was approved in 2020.
- Growth will be supported by the recently completed Gawler East Link road and the Northern Connector, reducing travel times to key centres and the City.
- Provisions under the *Local Government Act* were used to create separate rates, which were applied to newly created allotments to enable funding of community infrastructure, the link road and other traffic / transport related upgrades.

Figure 13: Gawler South



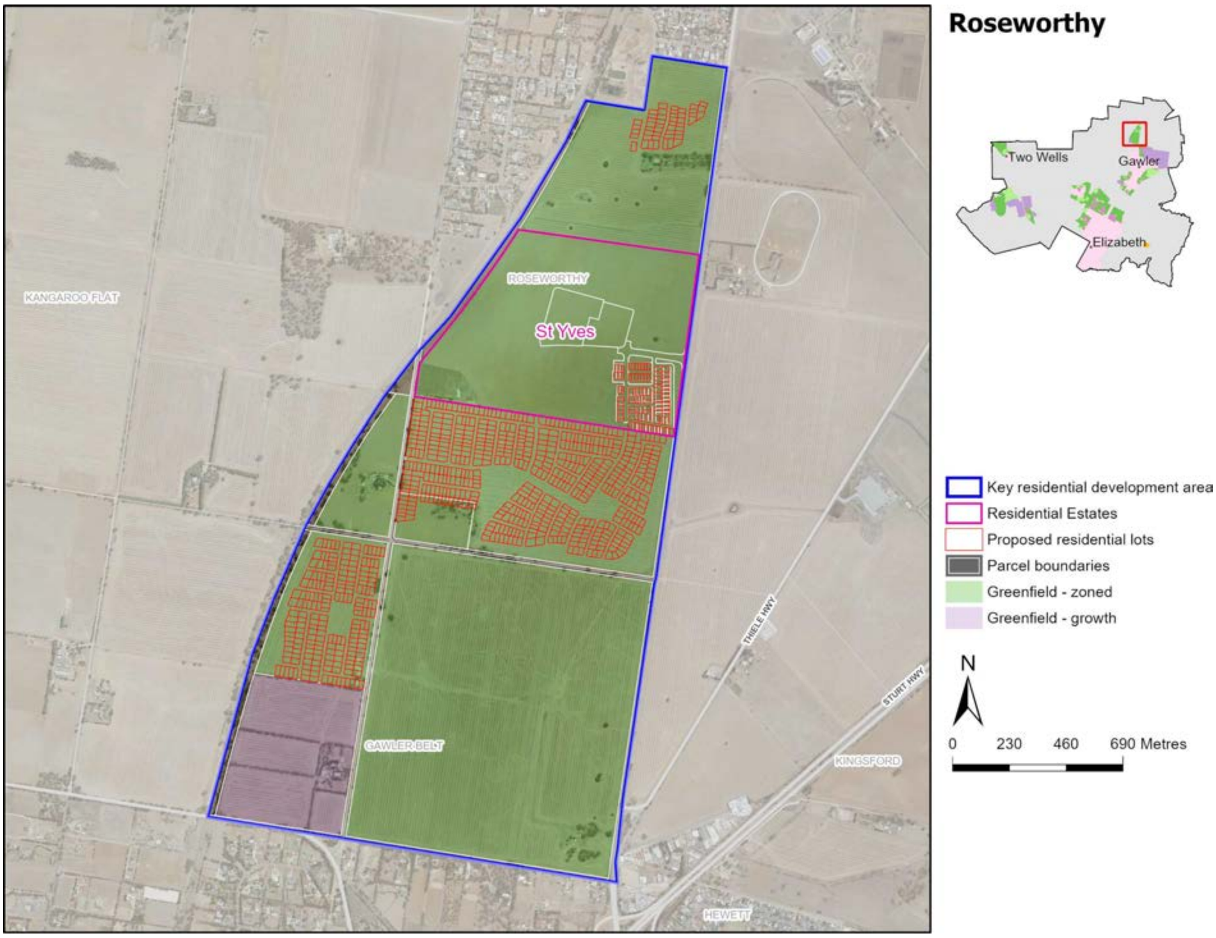
KEY MEASURES

Year Commenced	2016
Estimated dwelling capacity	753
Dwellings built since 2010	62
Average dwellings built per annum	14
Remaining Potential Capacity	**692**
Vacant lots	49
Development Ready (proposed lots)	151
Undeveloped Zoned	490

ANALYSIS

- This development front has constrained potential due to the topography and a fragmented land ownership. These factors potentially complicate a co-ordinated approach to development and infrastructure provision / funding.
- Should Undeveloped Zoned land be developed, it is estimated it could yield a further 490 allotments.
- This precinct is now serviced by the recently completed Gawler East Link Road.

Figure 14: Roseworthy



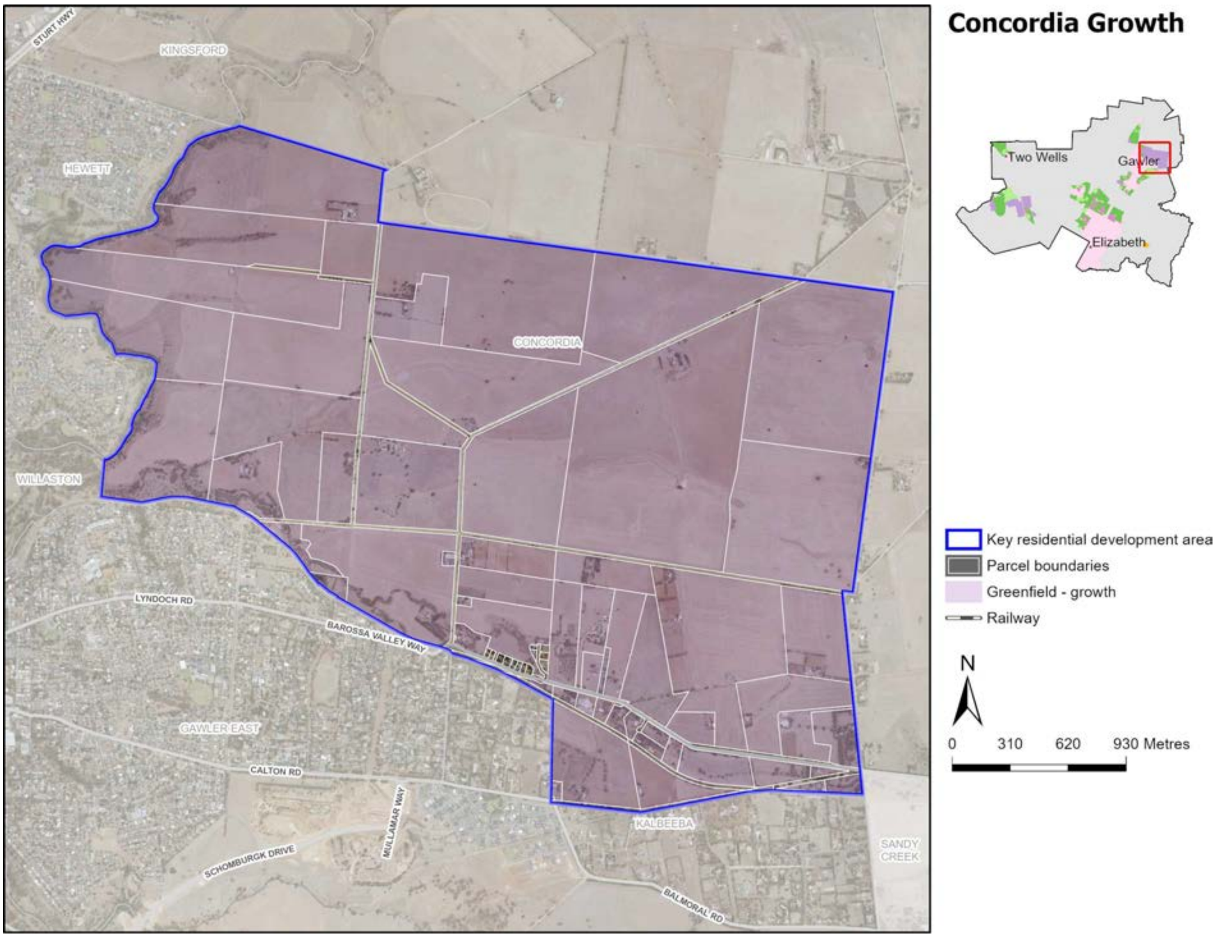
KEY MEASURES

Year Commenced	**2021**
Estimated dwelling capacity	3,149
Dwellings built since 2010	0
Average dwellings built per annum	0
Remaining Potential Capacity	3,149
Vacant lots	0
Development Ready (proposed lots)	871
Undeveloped Zoned	2,030
Future Urban growth area	248

ANALYSIS

- Site works at the St Yves development commenced in 2020. The first land parcels are currently on the market for purchase.
- Stage 2 of the development, which seeks to create an additional 49 allotments, was approved by Light Regional Council in February 2020.
- Construction of a reception to Year 10 School is expected to commence in 2022.
- Approval for an additional 368 lots on land immediately to the south of St Yves, referred to as '*Quindoo'*, was granted by the Light Regional Council on 8 July 2020.
- Infrastructure deeds are in place to fund necessary upgrades to road, stormwater and utility infrastructure and provision of social infrastructure.

Figure 15: Concordia



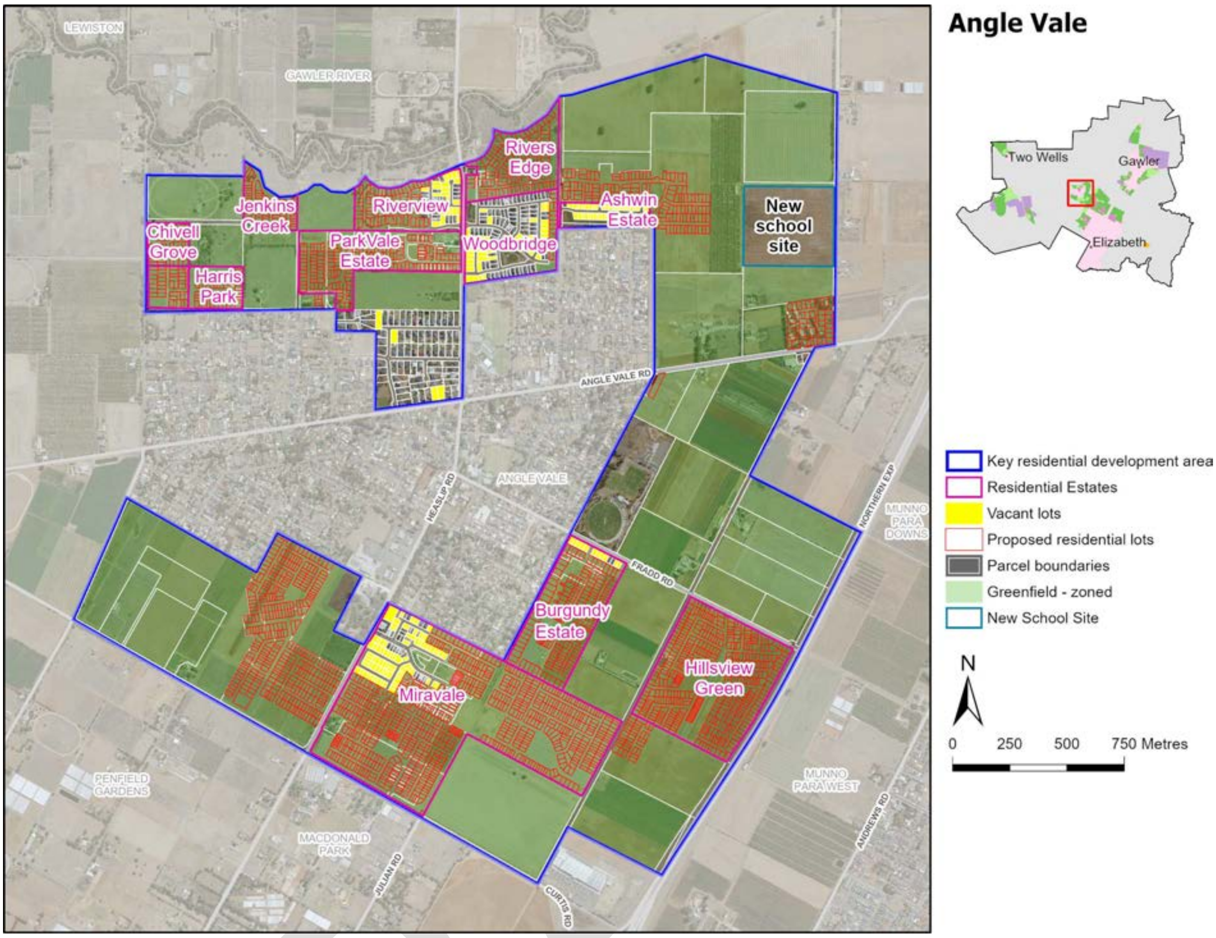
KEY MEASURES

Year Commenced	Not started
Estimated dwelling capacity	10,000
Dwellings built since 2010	-
Average dwellings built per annum	-
Vacant lots	-
Development Ready (proposed lots)	-

ANALYSIS

- This land is identified within *The 30 Year Plan for Greater Adelaide - 2017 Update* as a future urban growth area.
- It requires rezoning before becoming available for development.
- Land to the north and east is located within the *Character Preservation District (Barossa Valley),* therefore interface of new development would need to be considered.

Figure 16: Angle Vale



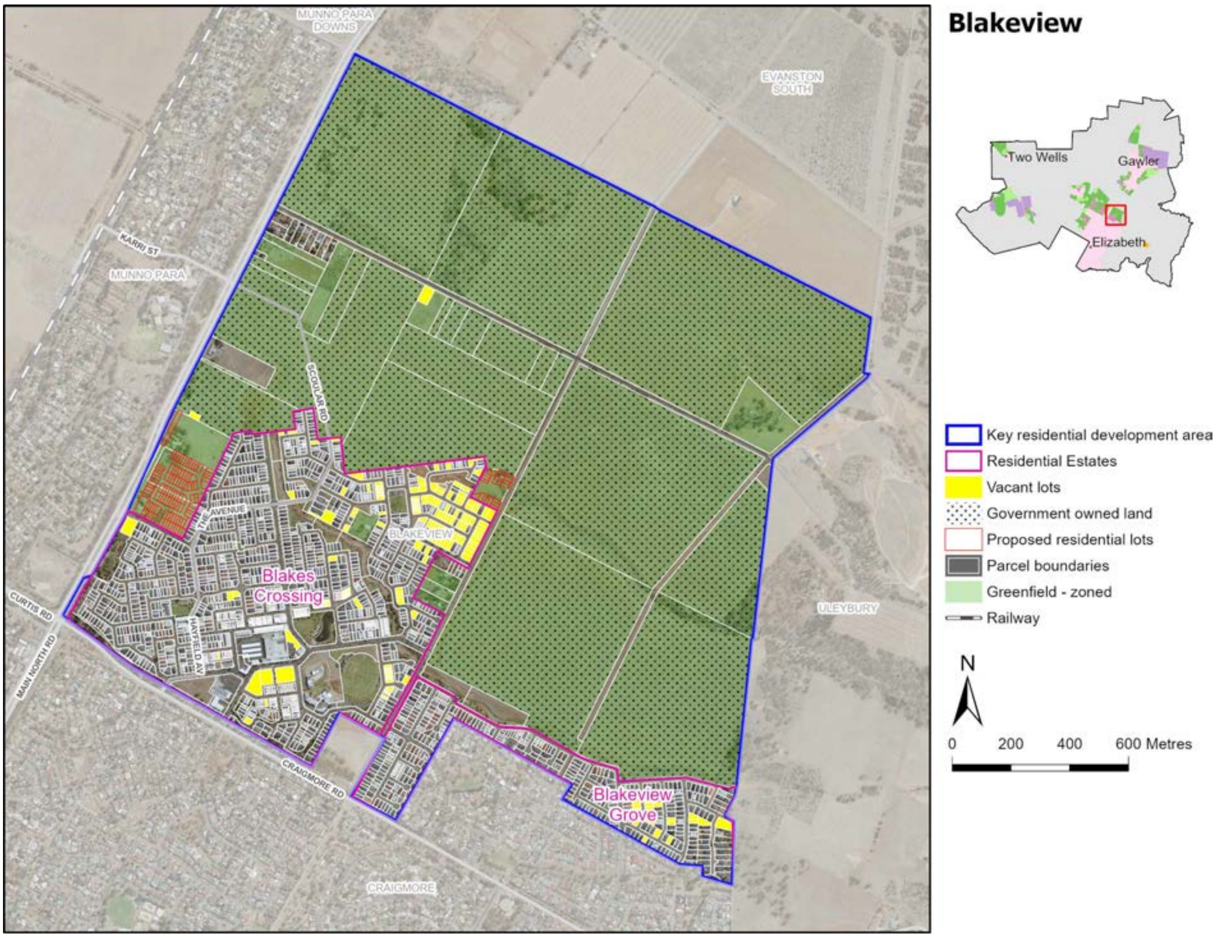
KEY MEASURES

Year Commenced	2010
Estimated dwelling capacity	6,955
Dwellings built since 2010	196
Average dwellings built per annum	19
Remaining Potential Capacity	**6,550**
Vacant lots	203
Development Ready (proposed lots)	2,431
Undeveloped Zoned	3,848
Future Urban growth area	36

ANALYSIS

- There are11 identified residential estates, accounting for over 2,400 Development Ready lots.
- In the last 2 years the rate of development has significantly increased, averaging over 60 dwelling completions compared to just 19 when averaged out over the last 10 years.
- Miravale is the most significant estate, with potential to accommodate 815 lots once complete.
- Estates located to the north are relatively small compared to the estates located south of the established ‘core’ of Angle Vale.
- Construction of the Angle Vale super school, and the recent completion of the Northern Expressway and Connector are likely to drive demand.
- The Angle Vale Road Infrastructure Deed is valued at over $54 million dollars and will be used to fund upgrades to Angle Vale Road, Heaslip Road, Frisby Road and Curtis Road along with other smaller local roads.
- A detailed Stormwater Management Plan for the area is close to completion.
- A new sewer main in Heaslip Road and Curtis Road is about to commence.

Figure 17: Blakeview



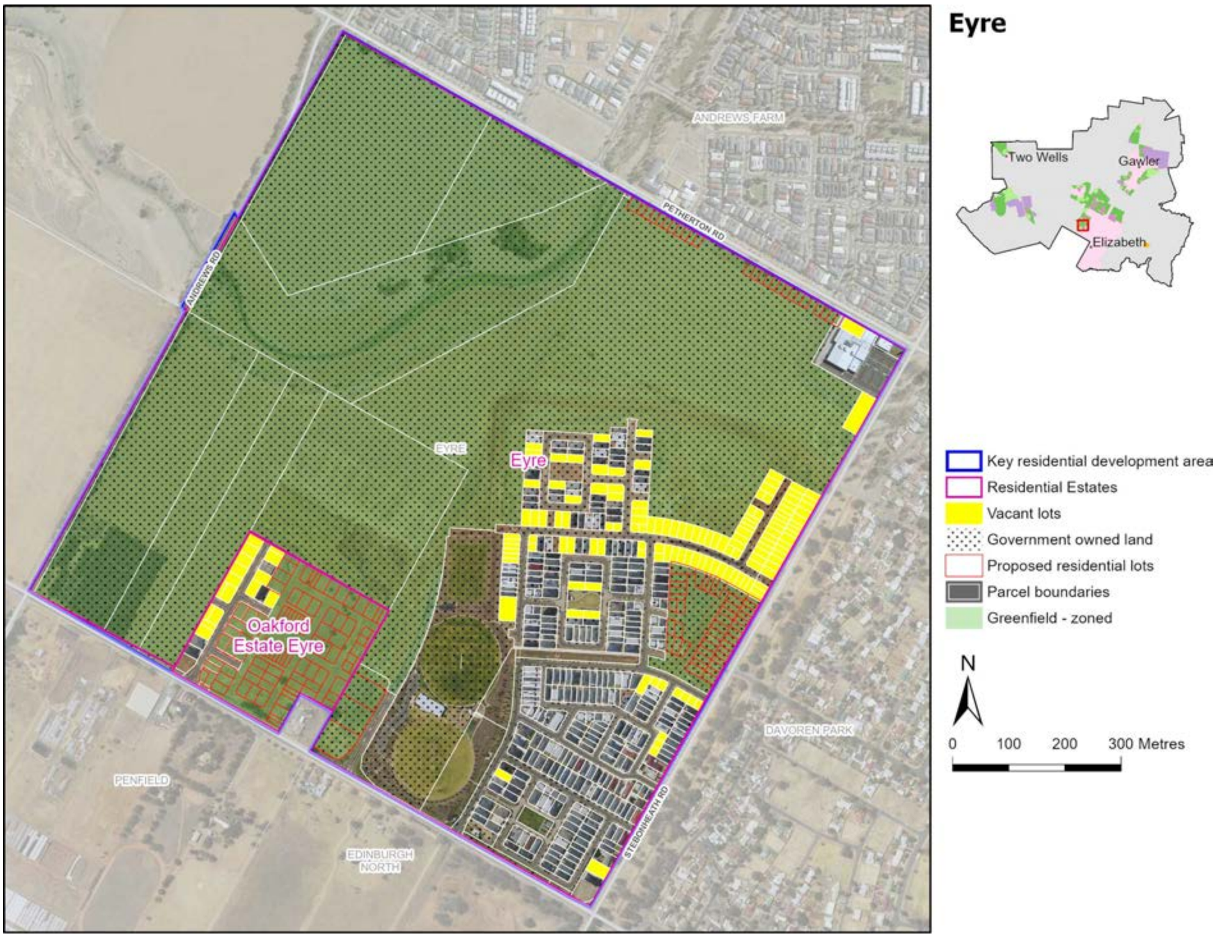
KEY MEASURES

Year Commenced	Pre-2010
Estimated dwelling capacity	6,996
Dwellings built since 2010	1,341
Average dwellings built per annum	167
Remaining Potential Capacity	**5,655**
Vacant lots	190
Development Ready (proposed lots)	123
Undeveloped Zoned	5,360

ANALYSIS

- The Blakes Crossing estate has produced around 130 dwellings per annum, on average, since 2010 making it one of the most productive estates in the Outer North.
- In the calendar year of 2018 over 300 dwellings were completed.
- The majority of Undeveloped Zoned land to the north and east is currently owned by Renewal SA, and has an estimated potential to deliver an additional 5,300 dwellings.

Figure 18: Eyre



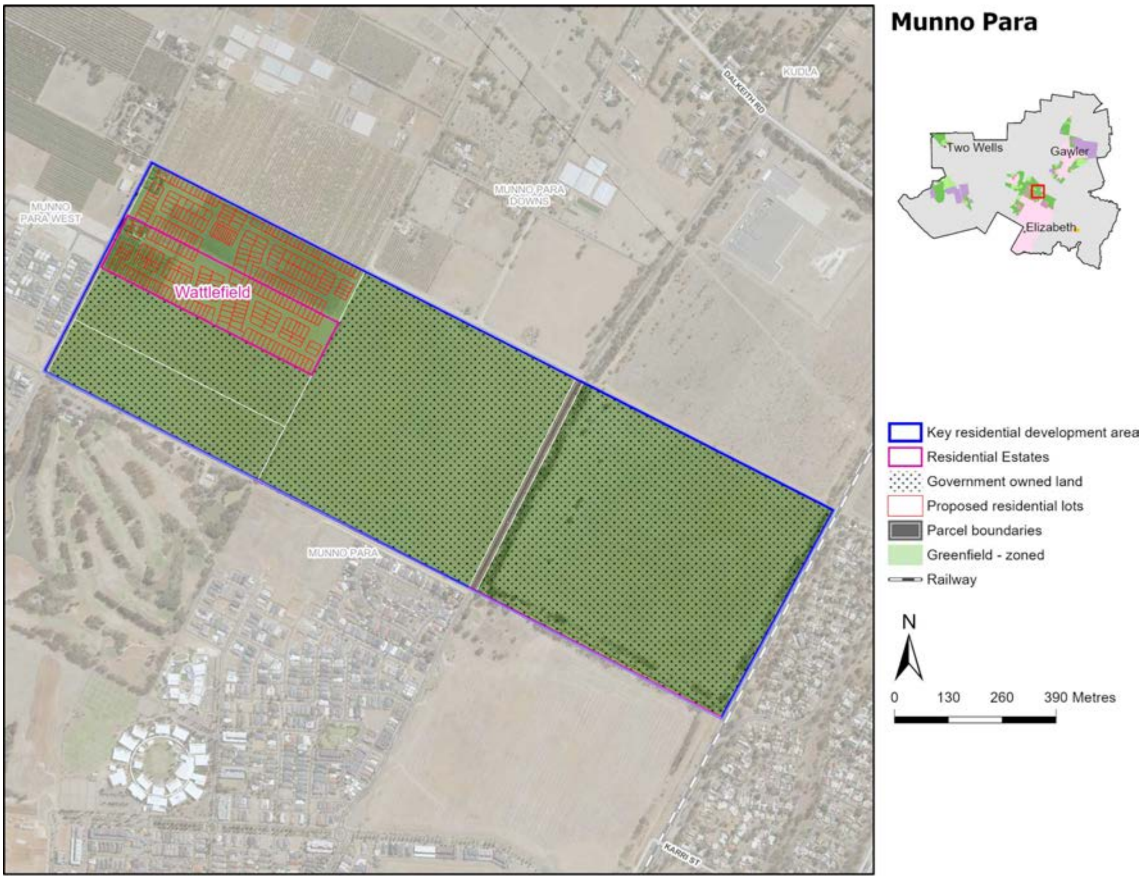
KEY MEASURES

Year Commenced	**2012**
Estimated dwelling capacity	1,946
Dwellings built since 2010	323
Average dwellings built per annum	38
Remaining Potential Capacity	**1,623**
Vacant lots	152
Development Ready (proposed lots)	165
Undeveloped Zoned	1,305

ANALYSIS

- The Eyre development at Penfield commenced in 2012 and, on average, has produced 38 dwellings per annum.
- Over the last 5 years this average has increased to 50.
- Undeveloped Zoned land to the north and west, which is owned by Renewal SA, could be brought to market when Development Ready land has been consumed.
- Upgrades to the adjacent road network, notably Womma Road are required.

Figure 19: Munno Para



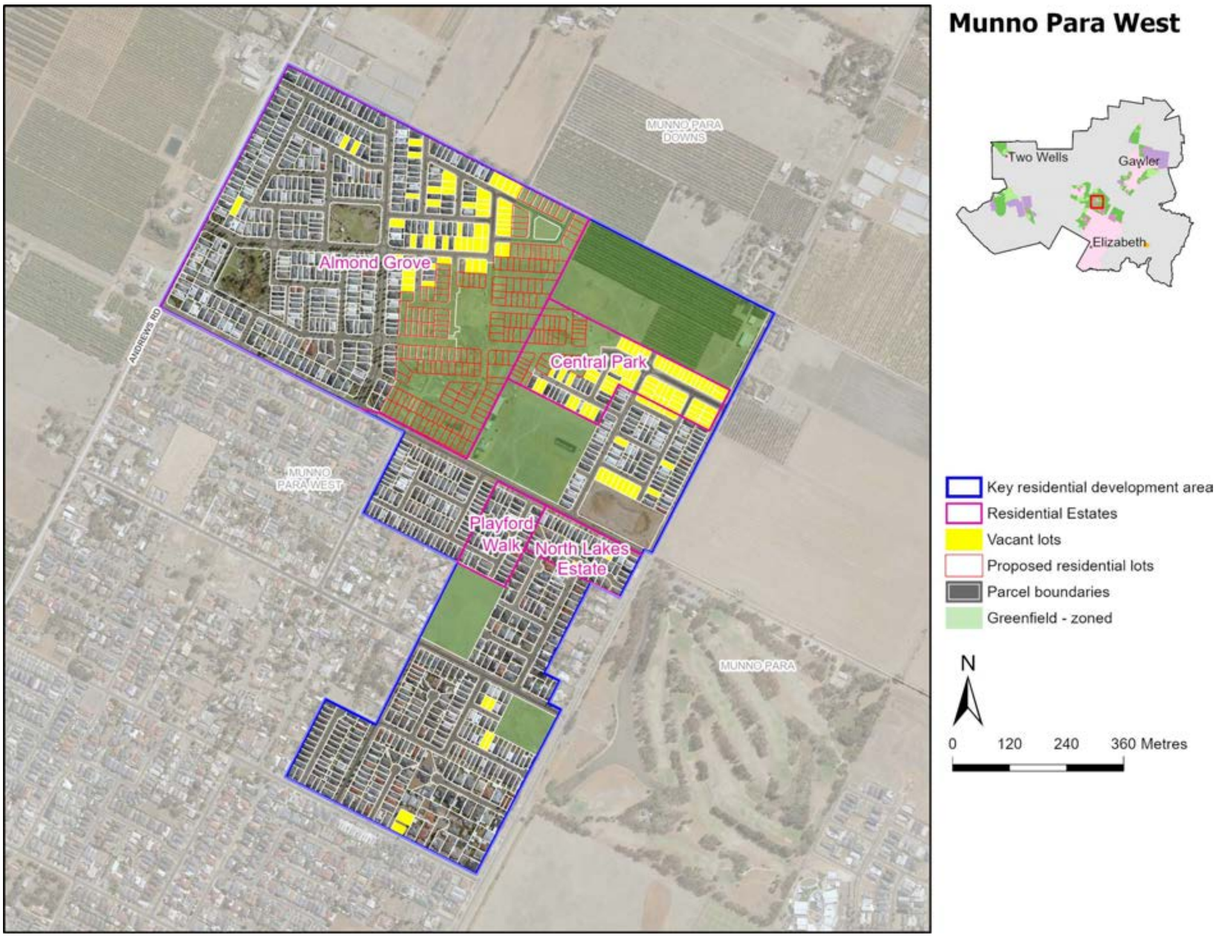
KEY MEASURES

Year Commenced	**Not started**
Estimated dwelling capacity	1,910
Dwellings built since 2010	-
Average dwellings built per annum	-
Remaining Potential Capacity	**1,910**
Vacant lots	0
Development Ready (proposed lots)	295
Undeveloped Zoned	1,615

ANALYSIS

- This land is mostly owned by Renewal SA and would appear to be a logical extension of Playford Alive development front to the south.
- An application for 295 lots was lodged in 2019 with construction expected to commence in 2021.
- The site could be readily serviced by SA Water for both sewerage and potable water with pipework already in place on the adjacent road network.

Figure 20: Munno Para West



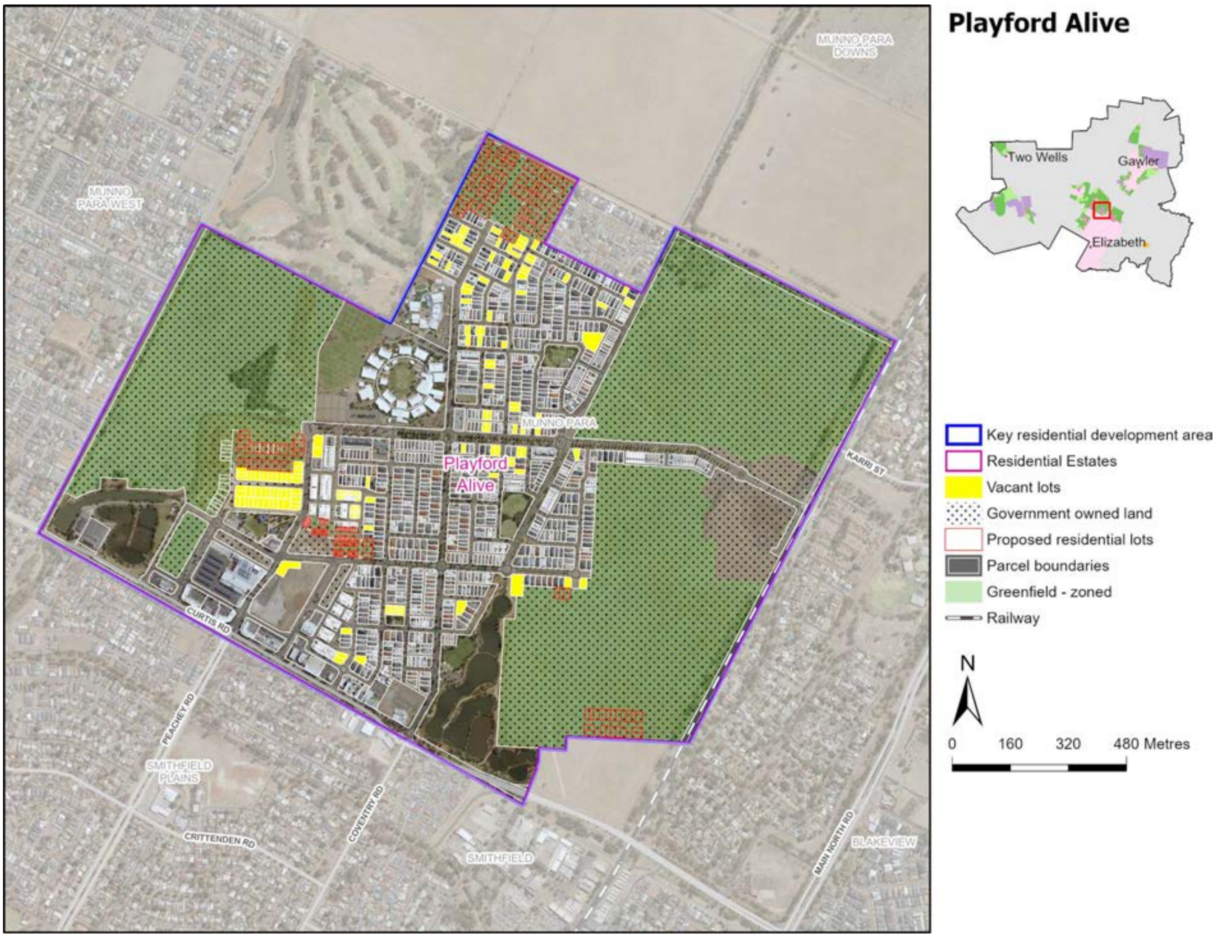
KEY MEASURES

Year Commenced	Pre-2010
Estimated dwelling capacity	1,406
Dwellings built since 2010	824
Average dwellings built per annum	78
Remaining Potential Capacity	**582**
Vacant lots	140
Development Ready (proposed lots)	205
Undeveloped Zoned	234

ANALYSIS

- There are 4 key residential estates within the precinct, with Almond Grove being the largest.
- The precinct has produced, on average, 78 dwellings per annum.
- Since 2015 the rate of development has increased to an average of over 100 dwelling completions per annum.
- There are still several Undeveloped Zoned parcels within the area that are in private ownership. This land has capacity for an estimated 200 dwellings.

Figure 21: Playford Alive



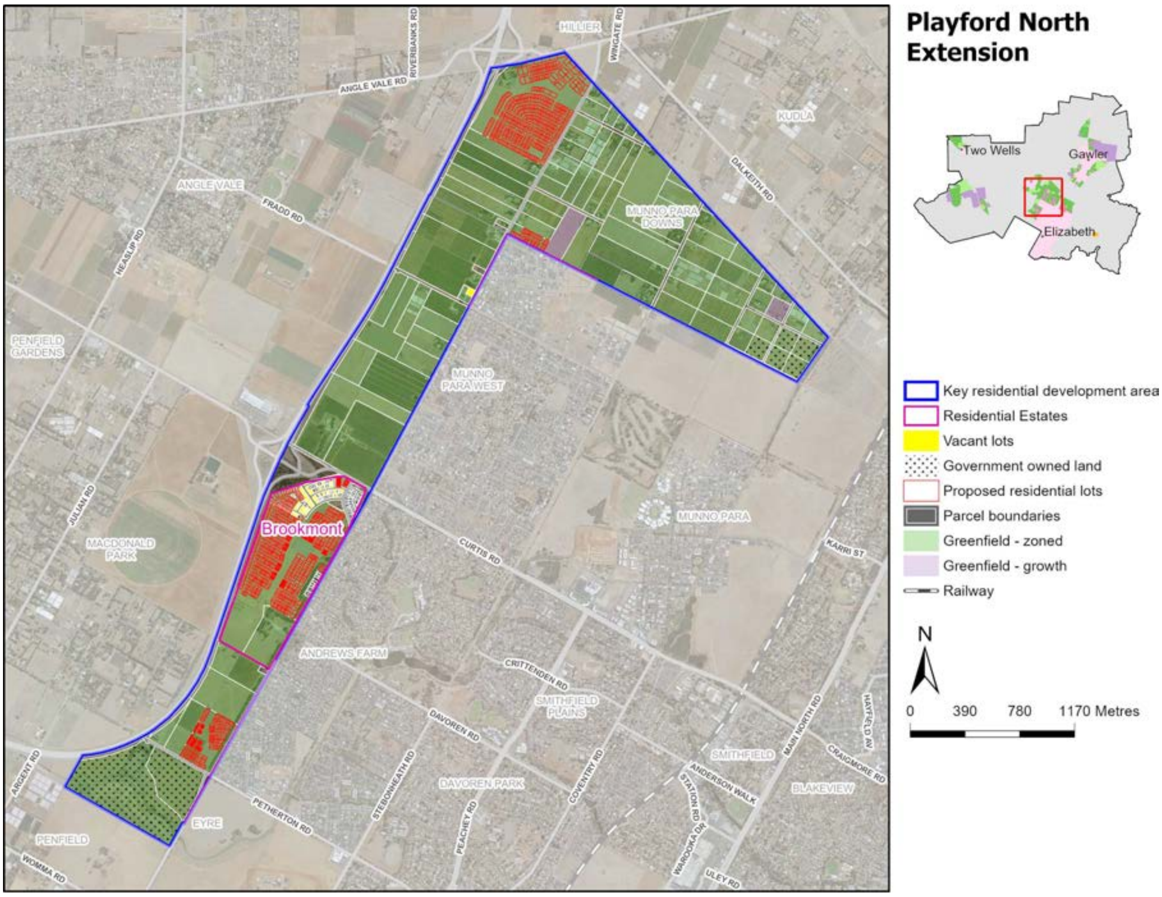
KEY MEASURES

Year Commenced	2010
Estimated dwelling capacity	3,838
Dwellings built since 2010	1,169
Average dwellings built per annum	111
Remaining Potential Capacity	**2,669**
Vacant lots	164
Development Ready (proposed lots)	221
Undeveloped Zoned	2,278

ANALYSIS

- Playford Alive is a joint venture between the State Government and private industry that commenced in 2010.
- The Federal Governments COVID-19 stimulus package could result in a significant increase in land sales, like many of the precincts within the region.
- Should demand continue, additional Undeveloped Zoned Renewal SA land to the north, east and west could be considered in the immediate future to supplement supply.
- Co-developed projects such as Playford Alive typically require additional products and infrastructure such as recycled water, which can make these developments attractive to new home buyers.

Figure 22: Playford North Extension



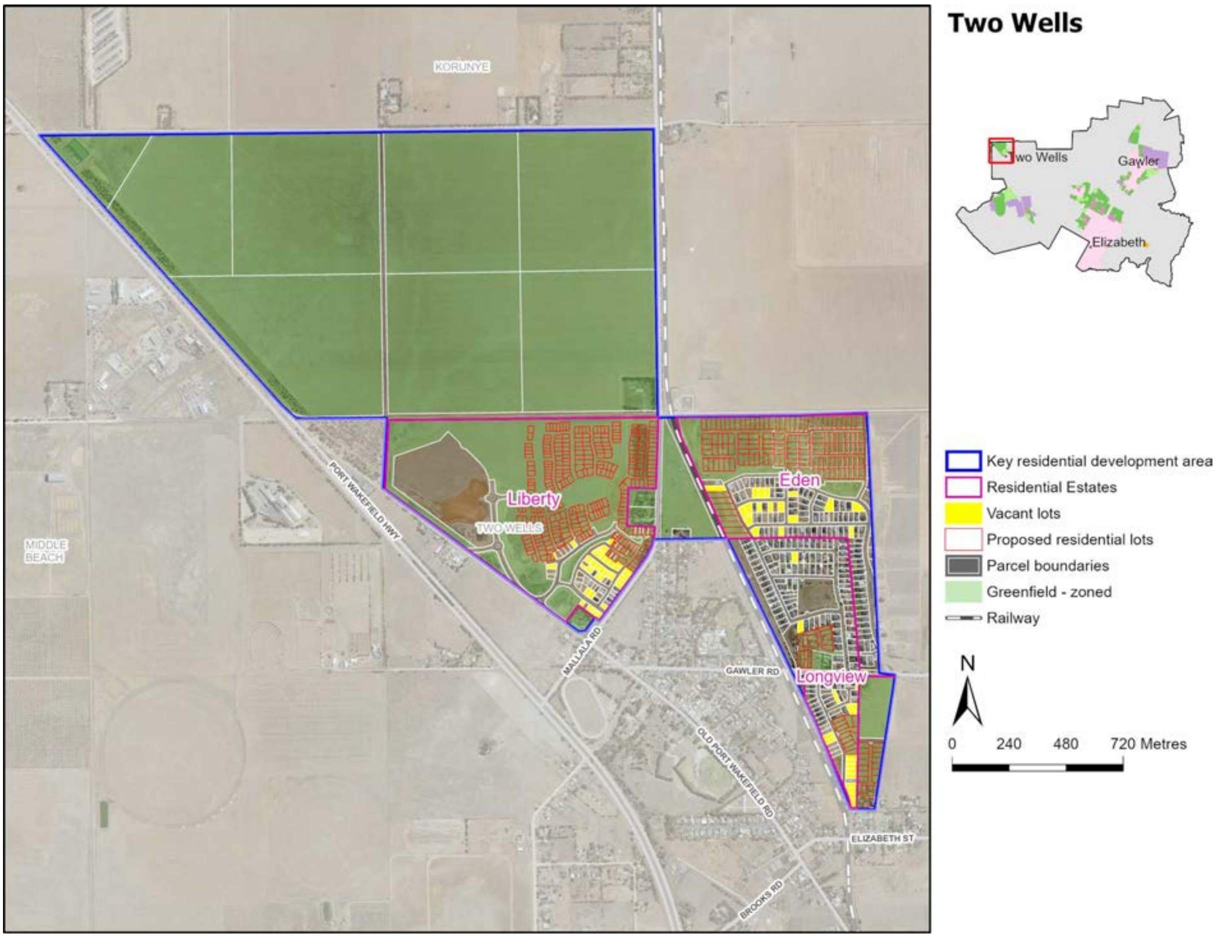
KEY MEASURES

Year Commenced	**2017**
Estimated dwelling capacity	7,832
Dwellings built since 2010	71
Average dwellings built per annum	24
Remaining Potential Capacity	**7,761**
Vacant lots	54
Development Ready (proposed lots)	1,402
Undeveloped Zoned	5,996
Future Urban growth area	107

ANALYSIS

- A total of 71 dwellings have been constructed within Brookmont Estate as of June 2020.
- This Estate has a proposed dwelling capacity of 737 (685 proposed allotments (plus 52 vacant lots).
- This precinct offers significant potential for growth, with Undeveloped Zoned land estimated to yield close to 6,000 dwellings.
- A portion of land to the south is owned by the Renewal SA, however appears to have some site constraints with Smith Creek running through the middle.
- A road infrastructure deed is in place to fund upgrades to 14 intersections and 24 sections of road, primarily being along Andrews Road, Womma Road and / or Curtis Road.

Figure 23: Two Wells



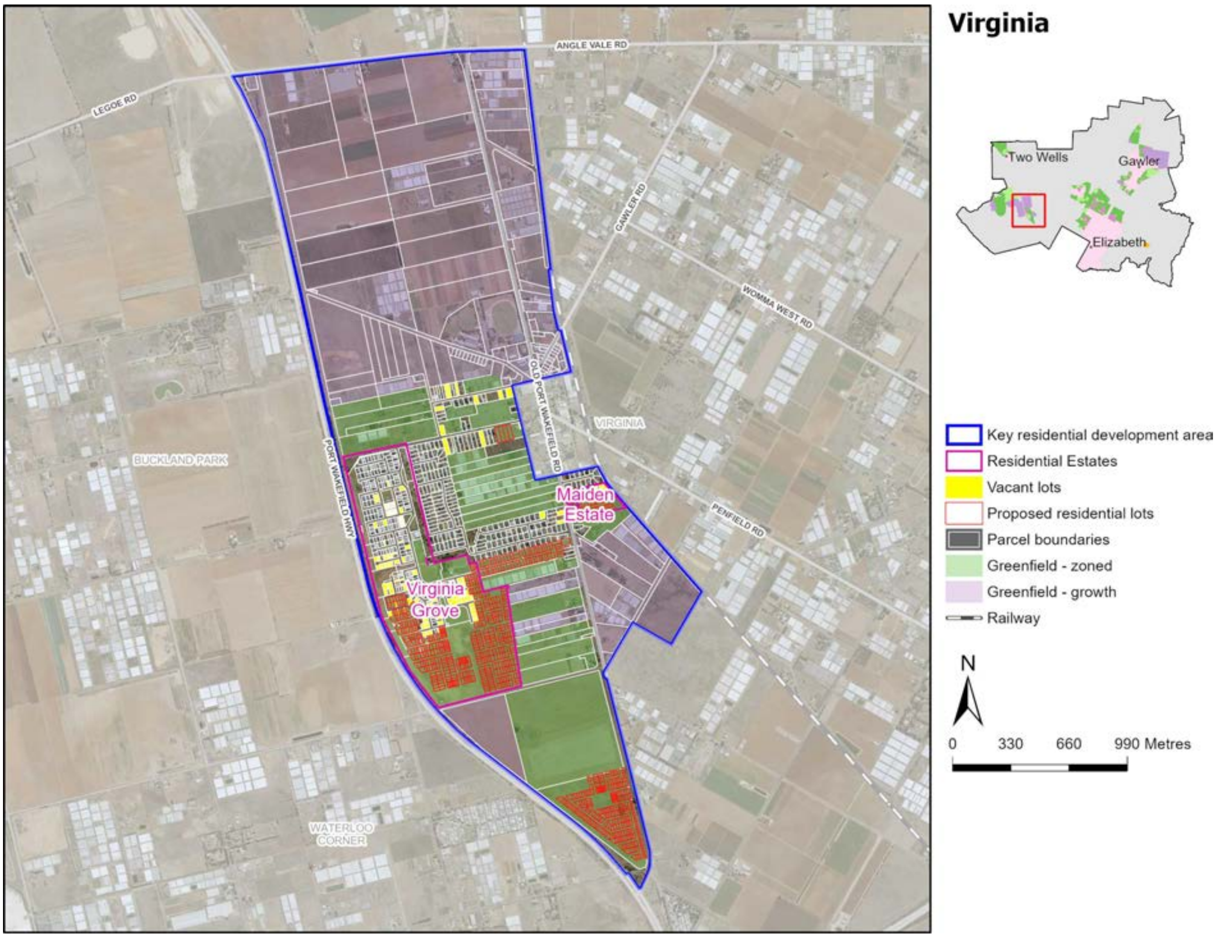
KEY MEASURES

Year Commenced	Pre-2010
Estimated dwelling capacity	2,875
Dwellings built since 2010	203
Average dwellings built per annum	19
Remaining Potential Capacity	**2,672**
Vacant lots	75
Development Ready (proposed lots)	478
Undeveloped Zoned	2,108

ANALYSIS

- 3 estates currently under development.
- Since 2018 the rate of development has markedly increased, with over 70 dwelling completions recorded in 2018.
- There are current infrastructure deed arrangements in place. The availability of financial contributions to fund infrastructure is dependent on the rate of development. This needs to be continually monitored to ensure infrastructure bottle necks do not occur.
- Two Wells is not connected to a SA Water trunk sewer main and currently relies on a community waste water scheme to service dwellings.
- SA Water’s potable water infrastructure is currently being upgraded in the area, including 4,500m of new pipework to improve water pressure and support projected growth.

Figure 24: Virginia



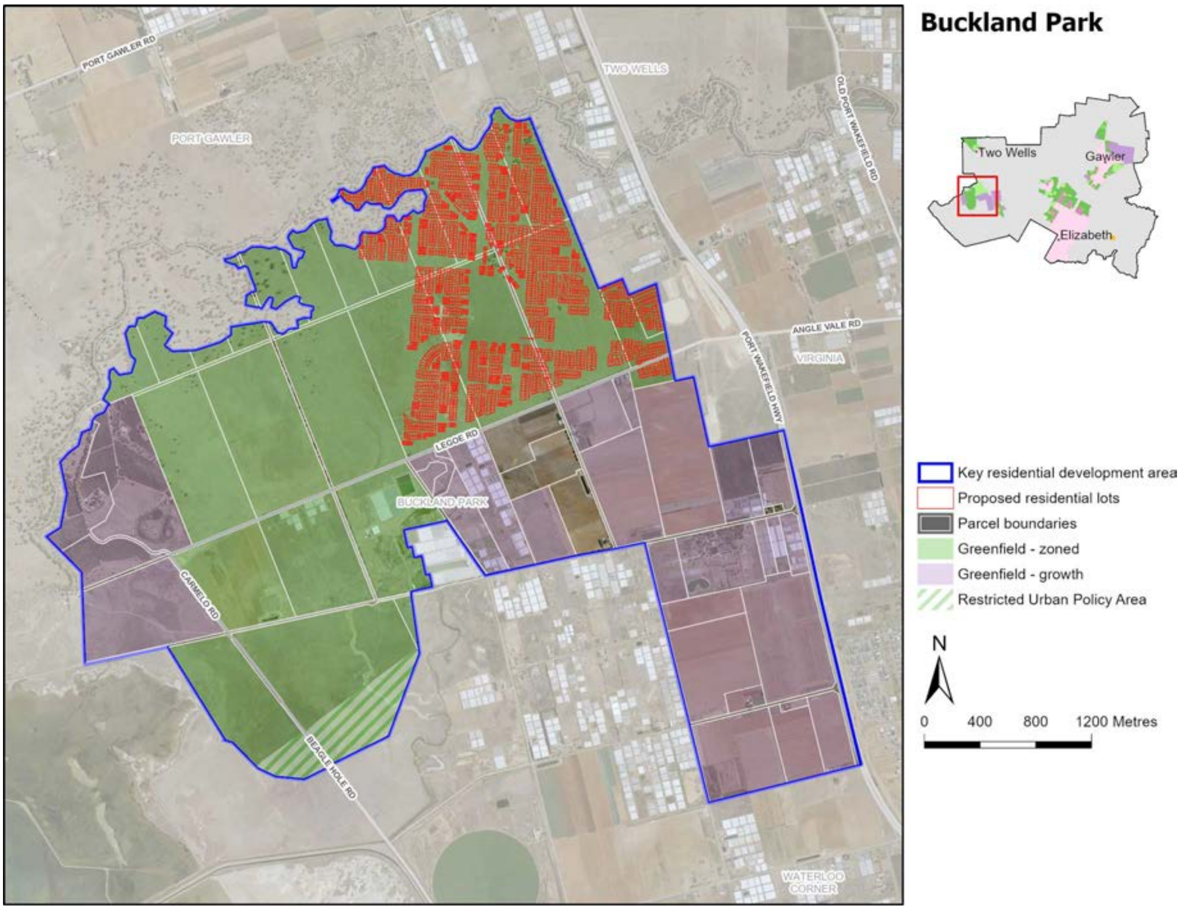
KEY MEASURES

Year Commenced	Pre-2010
Estimated dwelling capacity	6,111
Dwellings built since 2010	308
Average dwellings built per annum	29
Remaining Potential Capacity	**5,803**
Vacant lots	151
Development Ready (proposed lots)	723
Undeveloped Zoned	1,250
Future Urban growth area	3,663

ANALYSIS

- This development front has produced, on average, 29 dwellings per annum. Virginia Grove is the main estate.
- Since 2015 the rate of development has increased, averaging over 45 completions per annum.
- Completion of the Northern Connector and continued works on the North-South corridor have made this land more accessible.
- Construction of the Port Wakefield Road by-pass may also help facilitate growth.
- Road infrastructure deeds will fund upgrades to Old Port Wakefield Road and Penfield Road, including the rail crossing.

Figure 25: Buckland Park



KEY MEASURES

Year Commenced	Not started
Estimated dwelling capacity	14,884
Dwellings built sing 2010	0
Average dwellings built per annum	0
Remaining Potential Capacity	**14,884**
Vacant lots	0
Development Ready (proposed lots)	3,344
Undeveloped Zoned	5,953
Future Urban growth area	5,587

ANALYSIS

- Buckland Park was rezoned for residential development in 2010 and was granted Major Project status.
- Earthworks commenced in late 2020 and the first allotments will be available in 2021.
- Construction of the Northern Connector and the HomeBuilder stimulus package has provided the impetus to commence civil works.
- The site is not currently serviced by SA Water sewer mains.
- There are significant additional land parcels which remain unzoned should demand for existing allotments be exhausted.

2.6 Summary

The Outer North region is expansive, diverse and in many ways complicated when it comes to the provision, planning and development of Greenfield land. Whilst multiple development fronts exist across three clear and distinct sub-regions, it is likely that some development fronts will either be completed or close to completion by 2030, especially under a high growth scenario.

Greenfield land supply in the Outer North region can be summarised as follows:

- 12,400 Development Ready allotments.
- Capacity to accommodate an additional 33,900 allotments on Undeveloped Zoned land based on current development yields.
- Capacity to accommodate an additional 20,100 allotments on identified Future Urban growth areas, based on current development yields.
- Substantial Government owned land holdings in key development fronts across the three sub-regions.
- A range of key infrastructure issues across the three sub-regions, predominantly relating to the funding, coordination and timely delivery of required road and intersection upgrades.
- In addition to the above, as of June 2020 there were 1,300 vacant residential allotments, which have not been included in the analysis of available Greenfield land supply.

Growth Scenarios

Under a medium growth scenario, it is estimated that Greenfield development would need to produce an additional 950 dwellings a year. The high growth scenario will require an additional 13,000 dwellings to 2030.

3. GREENFIELD LAND SUPPLY - OUTER SOUTH

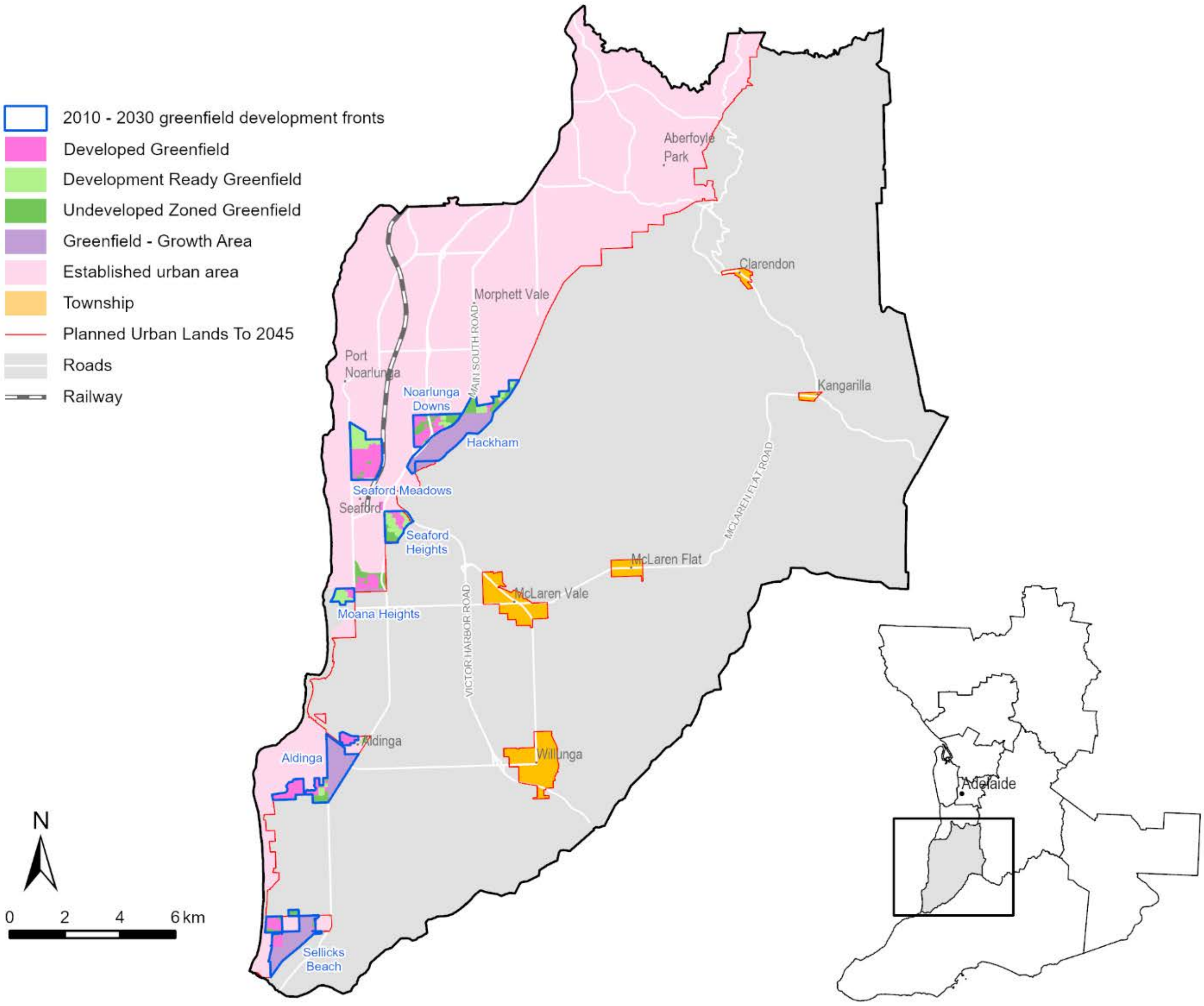
3.1 Overview

The Outer South region contains a diverse range of premium landscapes and tourist attractions that are well protected from urban encroachment and development. As a result opportunities for future Greenfield land development are quite limited as shown in Figure 26.

Key facts about the Outer South Region include:

- Contains the Local Government Area (LGA) of Onkaparinga.
- Has the lowest estimated Greenfield allotment supply of all the regions.
- Funded infrastructure projects over the next 10 years include the duplication of Main South Road to Aldinga and Sellicks Beach and the construction of a new super school at Aldinga, where works commenced in 2020.
- Key Government land holdings at Hackham and Aldinga held for future urban growth.
- Both the Township boundaries and any additional supply of Greenfield land are constrained by the Character Preservation District (McLaren Vale) which seeks to protect the area's valuable primary production activities and scenic values.

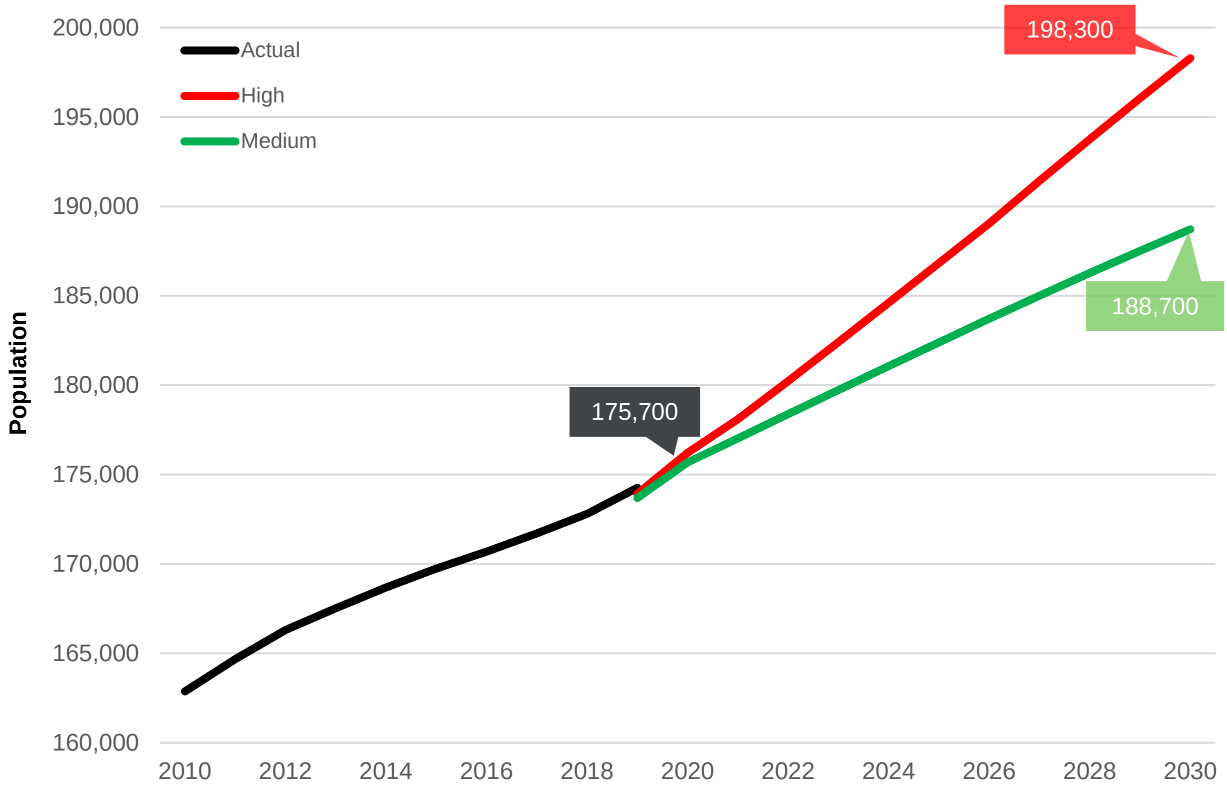
Figure 26: Outer South region geography



Population

- Between 2010 and 2019 the region has grown by 11,400 persons, at an average annual rate of 0.8%.
- In 2020 the projected population for the region is 175,700.
- Figure 27 shows actual growth to 2019, and projected growth from 2020 to 2030 for both a medium and a high growth scenario.

Figure 27: Population growth 2010 - 2030



Housing Demand

- Between 2010 and June 2020 a total of 10,000 dwellings were constructed.
- Under a medium growth scenario there is an estimated requirement for 6,100 additional dwellings between 2020 and 2030, with 2,800 to be built on Greenfield / Township land.
- Under a high growth scenario there is an estimated requirement for 8,900 additional dwellings between 2020 and 2030, with 4,100 to be built on Greenfield / Township land.

Land Supply

At June 2020:

- There were 1,900 Development Ready allotments available on Greenfield and Township land; and
- Potential for an estimated 4,000 allotments on Undeveloped Zoned land.

3.2 Recent development trends, 2010 – 2019

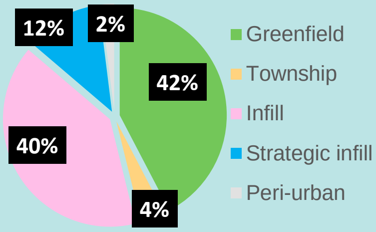
DWELLINGS BUILT

9,900 (gross)

8,200 (net)

820 p.a

DEVELOPMENT TYPE



DWELLING TYPE

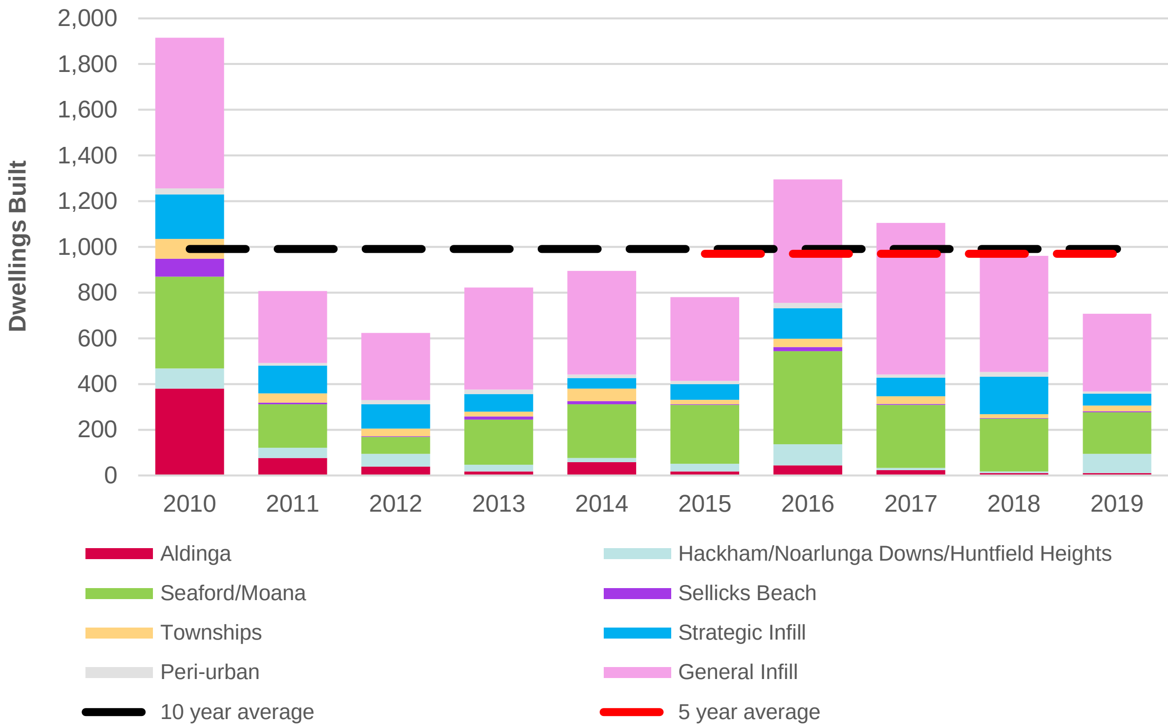
74% Detached

7% Retirement

Over this period, the following development trends have emerged within the region:

- A total of 9,900 dwellings were completed, resulting in a net gain of 8,800 dwellings once demolitions were excluded.
- Greenfield development accounted for 42% of total dwellings built between 2010 and 2019.
- Detached dwellings accounted for 74% of total dwellings built.
- Dwelling completions peaked in 2010, coinciding with large contributions from Seaford Meadows and the Aldinga 'Sunday' Estate, as illustrated in Figure 28.
- Seaford Meadows accounted 21% of total dwellings built.
- Since 2011 the majority of Greenfield development has been contained to Seaford, which comprises development at Seaford Meadows, Seaford Heights, Seaford Rise and Moana Heights estates as shown in Figure 28.

Figure 28: Gross number of dwellings built by year, 2010 - 2019



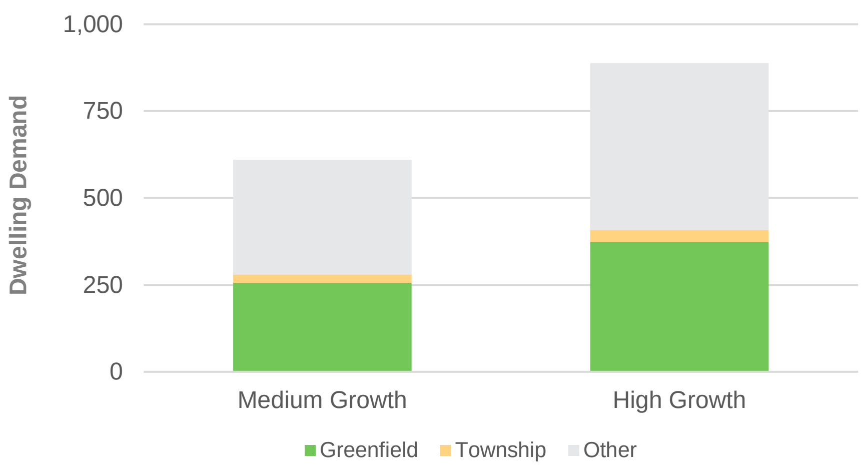
3.3 Future demand, 2020 – 2030

POPULATION CHANGE	TOTAL DWELLING DEMAND	GREENFIELD & TOWNSHIP DWELLING DEMAND
13,000 (medium) **1,300**p.a	**6,100** (medium)	**2,800** (medium)
22,000 (high) **2,200**p.a	**8,900** (high)	**4,100** (high)

The report provides a projected medium and a high growth scenario for both population and dwelling demand. This has been prepared to assist strategic and infrastructure planning at a local and state government level because decision and policy makers must be cognisant of the impacts that both scenarios are likely to have on future demand for land, services and critical infrastructure.

Projected population growth and average household size have been used to estimate dwelling demand under both a medium and high population growth scenario, as shown in Figure 29.

Figure 29: Projected annual dwelling demand to 2030



Analysis of these projections indicates:

- Under a medium growth scenario an additional 280 dwellings per annum would be required from both Greenfield and Township development to accommodate projected demand.
- Under a high growth scenario an additional 410 dwellings per annum would be required from both Greenfield and Township development to accommodate projected demand.

3.4 Greenfield and Township land supply to 2030

DEVELOPMENT READY

1,800 lots

UNDEVELOPED ZONED

2,400
Estimated lots

FUTURE URBAN GROWTH

4,900
Estimated lots

Greenfield and Township development combined to account for a total 47% of all dwellings built between 2010 and June 2020. It is assumed this trend will continue with land at Seaford Meadows, Hackham and Aldinga likely to become available over the next couple of years.

A stocktake of Greenfield and Township land supply within the region is illustrated in Figure 30 and Table 5, and demonstrates:

- 20% of land supply is deemed Development Ready.
- Seaford Meadows accounts for 730 Development Ready allotments.
- 26% of estimated allotment potential is located on Undeveloped Zoned land.
- Hackham has an estimated allotment potential of 800 on Undeveloped Zoned land and an estimated allotment potential of 2,000 over land assigned Future Urban growth area.
- 54% of the estimated total land supply is located within identified Future Urban growth areas at Hackham, Aldinga and Sellicks Beach.

Figure 30: Greenfield and Township land supply by development front, June 2020

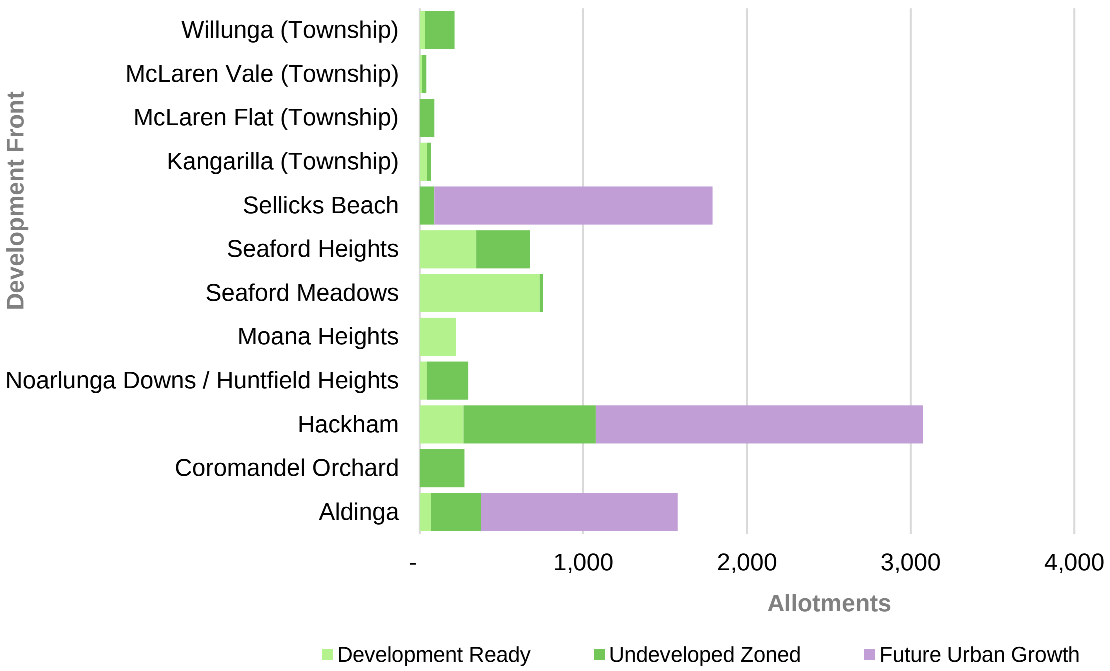


Table 5: Greenfield and Township land supply by development front – Outer South, June 2020

STATUS	DEVELOPMENT READY		UNDEVELOPED ZONED		FUTURE URBAN GROWTH AREA	
Sub Region & Development Fronts	**Area (ha)**	**Lots**	**Area (ha)**	**Estimated Lots**	**Area (ha)**	**Estimated Lots**
Aldinga	5	71	20	304	122	1,200
Coromandel Orchard	-	-	27	274	-	-
Hackham	14	267	42	808	182	2,000
Noarlunga Downs / Huntfield Heights	3	43	20	254	-	-
Moana Heights	22	223	-	-	-	-
Seaford Heights	25	346	24	327	-	-
Seaford Meadows	46	733	1	20	-	-
Sellicks Beach	-	-	9	90	130	1,700
Kangarilla	6	44	4	24	-	-
McLaren Flat	-	-	9	90	-	-
McLaren Vale	1	13	1	28	-	-
Willunga	2	31	12	183	-	-
TOTAL	**124**	**1,771**	**169**	**2,403**	**434**	**4,900**

*Precincts shaded green are identified as Greenfield development areas, and precincts shaded yellow are identified as Townships.

3.5 Key Greenfield and Township development fronts

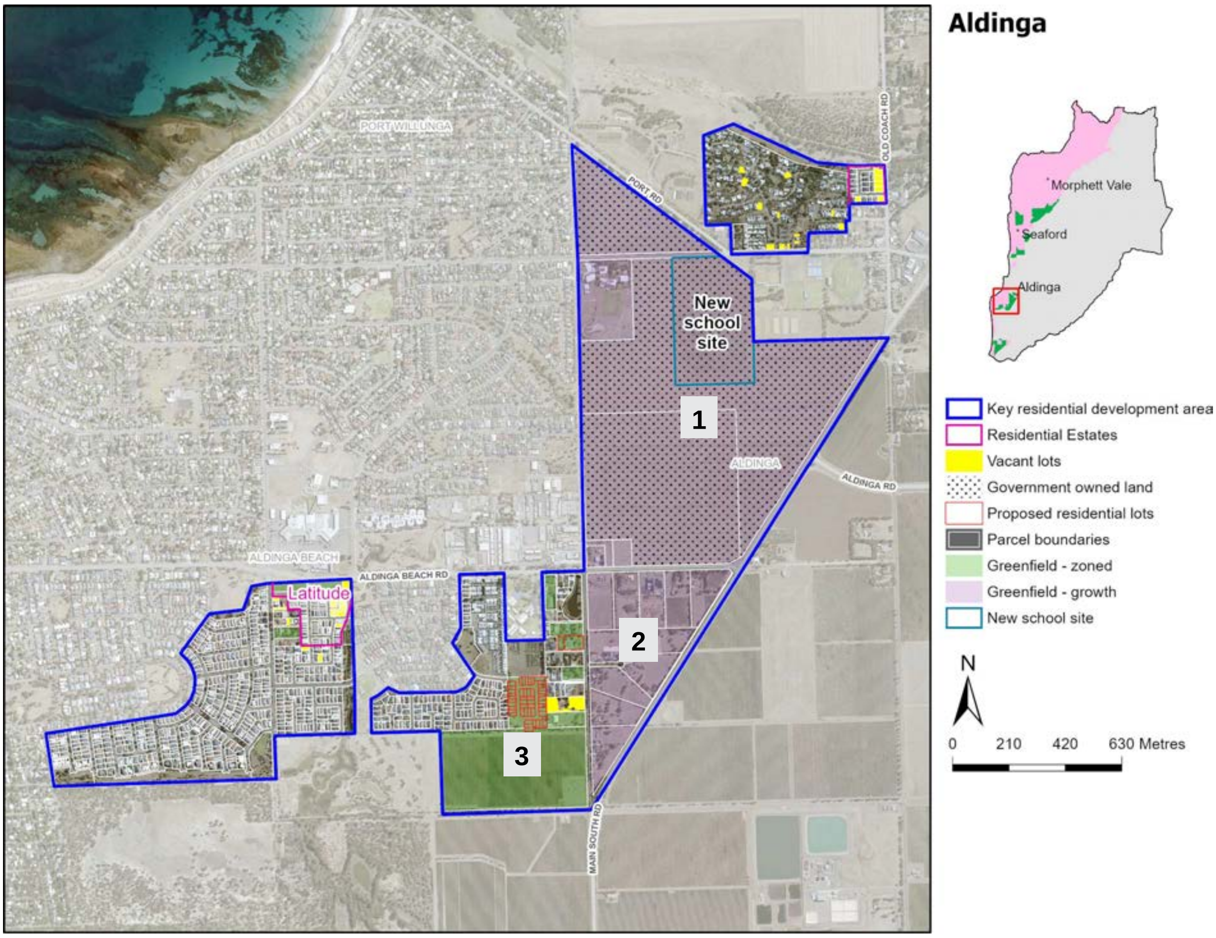
The following section provides analysis on Greenfield and Township development and land supply for the following precincts:

- Aldinga
- Hackham
- Noarlunga Downs – Huntfield Heights
- Moana Heights
- Seaford Heights
- Seaford Meadows
- Sellicks Beach
- Kangarilla
- McLaren Flat
- McLaren Vale
- Willunga

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, key residential estates, vacant land supply (as of June 2020), proposed lots (June 2020) and land supply sources (Undeveloped Zoned and Future Urban Growth Area);
- A table summarising key measures, including total number of dwelling built to June 2020, and a breakdown of available land supply as of June 2020, by the following categories:
    - Vacant lots
    - Development Ready (proposed lots)
    - Undeveloped Zoned (estimated yield)
    - Future Urban Growth Area (estimated yield)
- Overview of development trends, land supply and infrastructure.

Figure 31: Aldinga



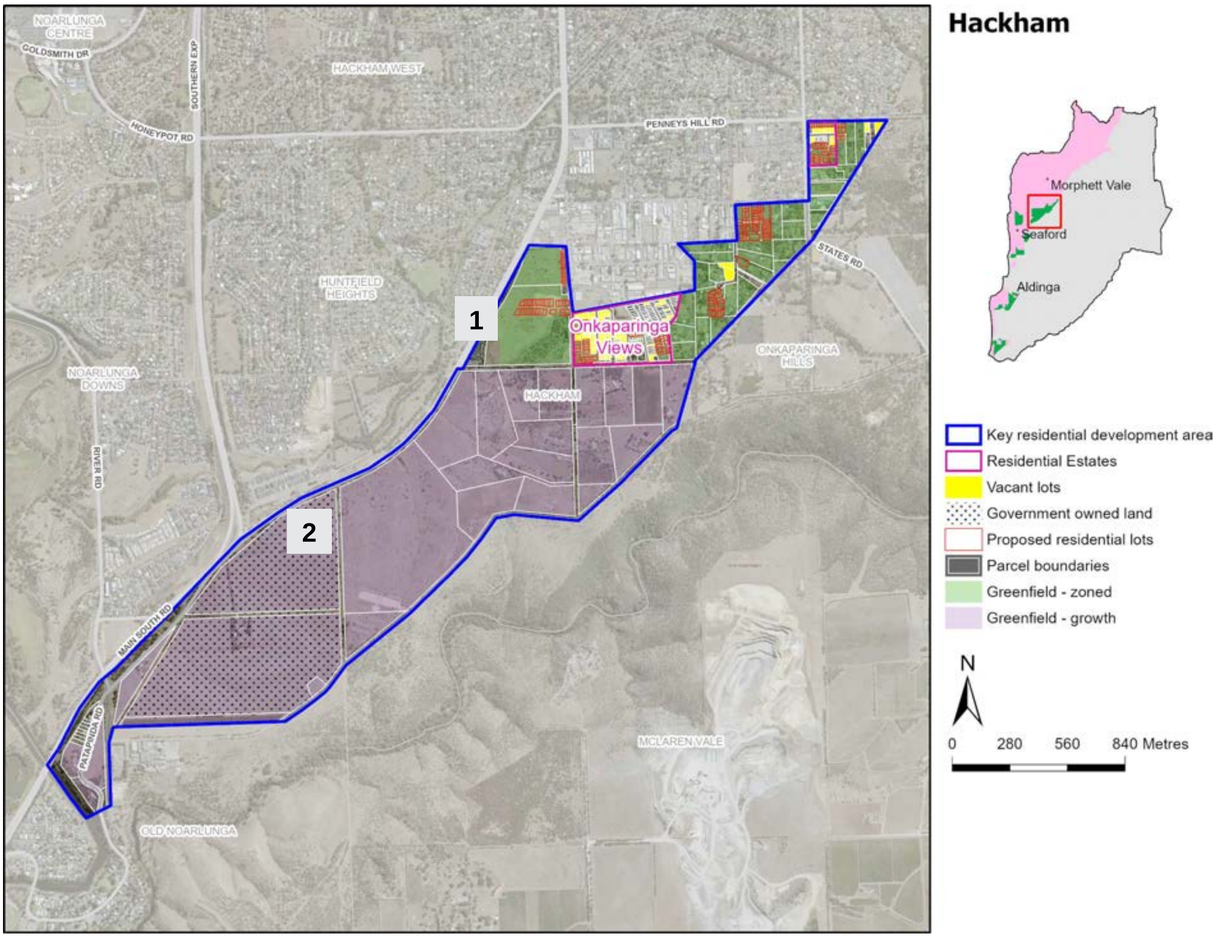
KEY MEASURES

Year Commenced	Pre-2010
Estimated dwelling capacity	2,314
Dwellings built since 2010	679
Average dwellings built per annum	68
Remaining Potential Capacity	**1,635**
Vacant lots	60
Development Ready (proposed lots)	71
Undeveloped Zoned	304
Future Urban growth area	1,200

ANALYSIS

- 3 distinct development areas.
- Development Area 1 comprises 3 separate land parcels with a total site area of 95ha, which are owned by Renewal SA.
  - The 11.5ha triangular section of land north of Quinliven Road and does not form part of the current rezoning process which seeks to enable residential development for the remainder of the site.
  - The Aldinga B-12 school, is currently under construction and will accommodate 1,500 students upon completion in 2022 and occupies 14ha of land.
  - The land subject to the current rezoning is estimated to yield 1,000 dwellings.
  - Several upgrades are required to existing wastewater infrastructure to accommodate projected development / growth.
- Development Area 2 is currently zoned Primary Production and has fragmented private ownership. If developed it has an estimated yield of 200.
- Development Area 3 has been rezoned to residential, and comprises an active land division, over the northern portion of the site. Once fully developed it is estimated to yield approximately 300 dwellings.

Figure 32: Hackham



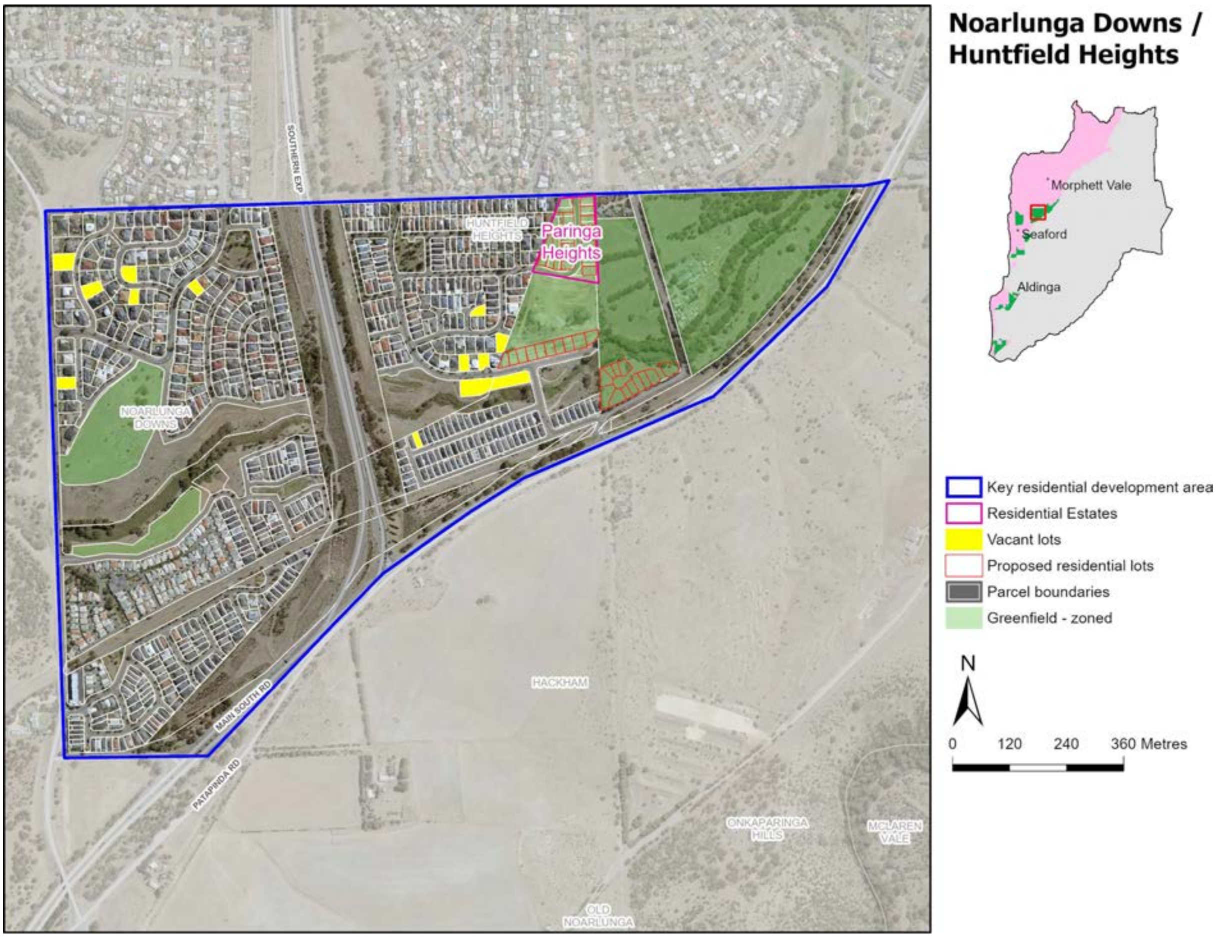
KEY MEASURES

Year Commenced	2017
Estimated dwelling capacity	3,246
Dwellings built since 2010	71
Average dwellings built per annum	20
Remaining Potential Capacity	**3,184**
Vacant lots	109
Development Ready (proposed lots)	267
Undeveloped Zoned	808
Future Urban growth area	2,000

ANALYSIS

- 2 distinct development areas.
- Development Area 1 is already zoned residential, and comprises multiple active development fronts, most notably the Onkaparinga Views project, which has been released in multiple stages.
  - The next stage will involve land located directly behind Mick O'Shea's pub on Main South Road.
- Development Area 2 is land identified within *The 30 Year Plan for Greater Adelaide - 2017 Update* and has an estimated potential yield of 2,000 dwellings.
  - This area is held by multiple land owners, with part of the south-western portion owned by Renewal SA.
  - Future development will be constrained, in part by slope, particularly in the middle section, potentially reducing estimated dwelling yields.
- Improvements to facilitate safe and efficient vehicle access and egress to Main South Road will need to be considered.

Figure 33: Noarlunga Downs - Huntfield Heights



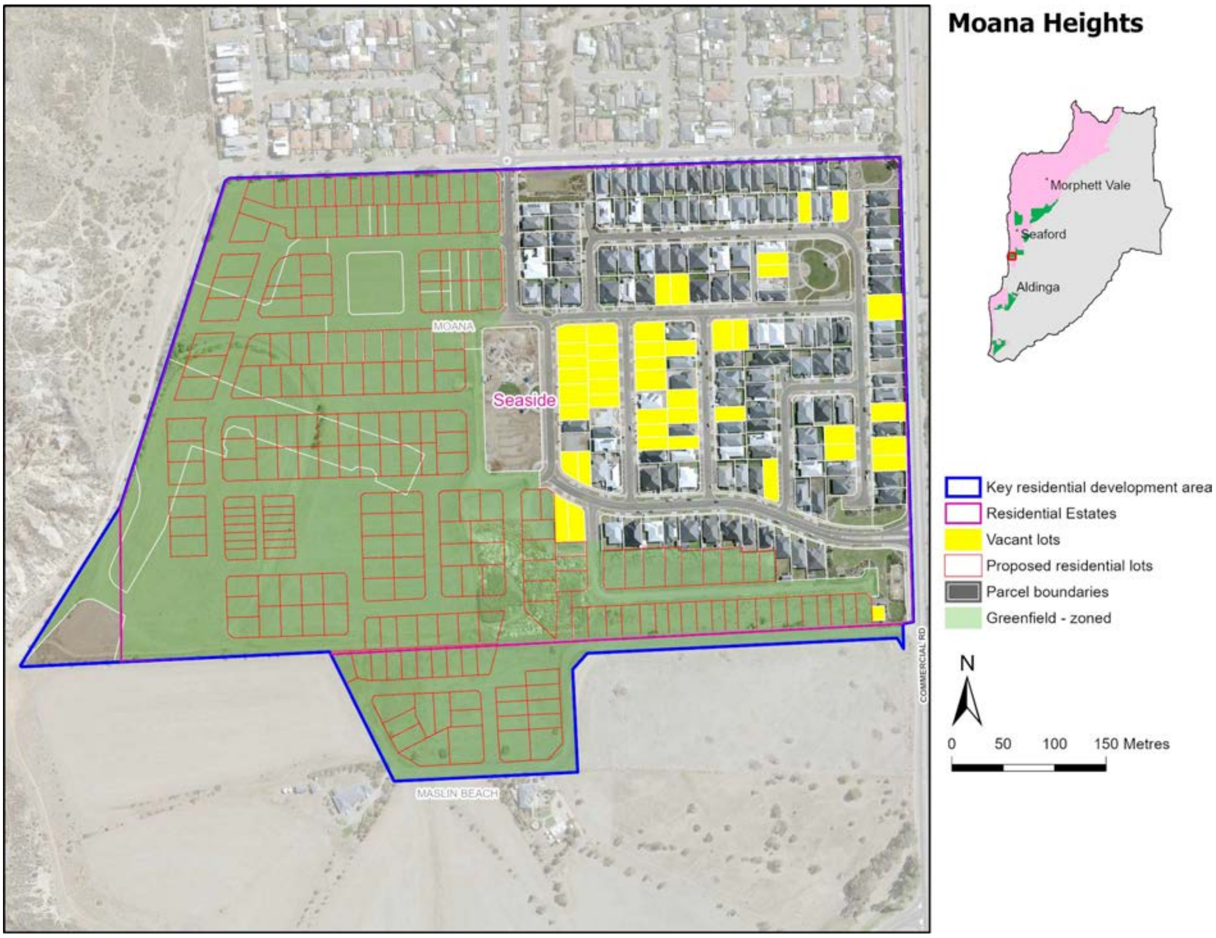
KEY MEASURES

Year Commenced	**Pre-2010**
Estimated dwelling capacity	712
Dwellings built since 2010	402
Average dwellings built per annum	38
Remaining Potential Capacity	**310**
Vacant lots	13
Development Ready (proposed lots)	43
Undeveloped Zoned	254

ANALYSIS

- Paringa Heights is the only active residential estate within this development front.
  - A current land division application seeks the creation of 21 allotments.
  - Given the substantial slope, proposed allotments have been levelled prior to sale.
- Greenfield land to the eastern side also has slope constraints.

Figure 34: Moana Heights



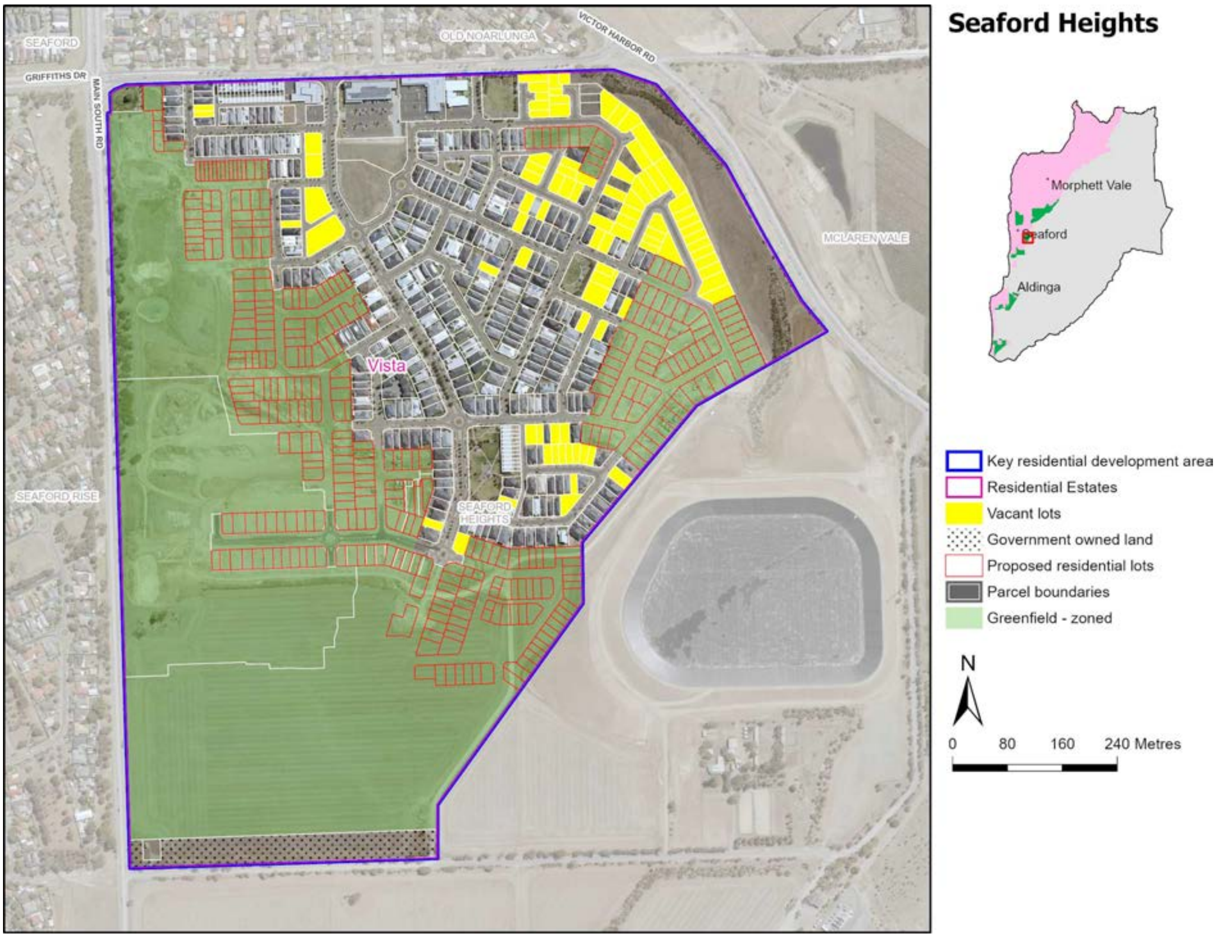
KEY MEASURES

Year Commenced	2016
Estimated dwelling capacity	410
Dwellings built since 2010	144
Average dwellings built per annum	32
Remaining Potential Capacity	**266**
Vacant lots	43
Development Ready (proposed lots)	223

ANALYSIS

- As the development has progressed in this area, some allotment sizes increased in response to market demand.
- This development front comprises the Seaside Estate and a separate land division to the south.
- Vacant land to the south does not currently support residential development.

Figure 35: Seaford Heights



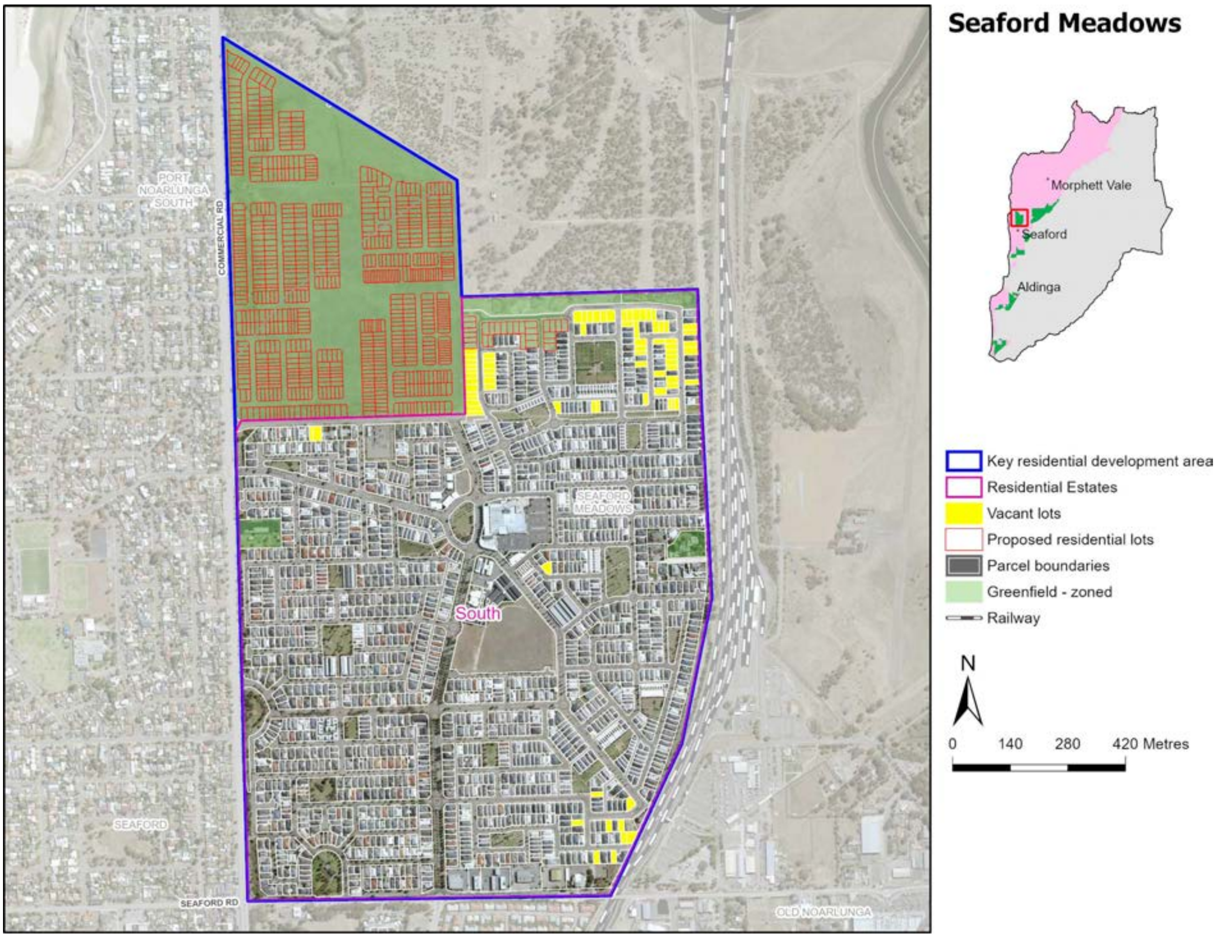
KEY MEASURES

Year Commenced	**2016**
Estimated dwelling potential	1,107
Dwellings built since 2010	348
Average dwellings built per annum	77
Remaining Potential Capacity	**759**
Vacant lots	86
Development Ready (proposed lots)	346
Undeveloped Zoned	327

ANALYSIS

- Since 2016 Seaford Heights has produced almost 80 dwellings per annum, on average.
- This development front includes a retail / commercial component which is located off Robinson Road.
- Additional Undeveloped Zoned is available for future development.
- There is no additional scope to expand beyond the current boundaries as it is adjacent to Southern Region Waste Resource Facility located to the south-east.

Figure 36: Seaford Meadows



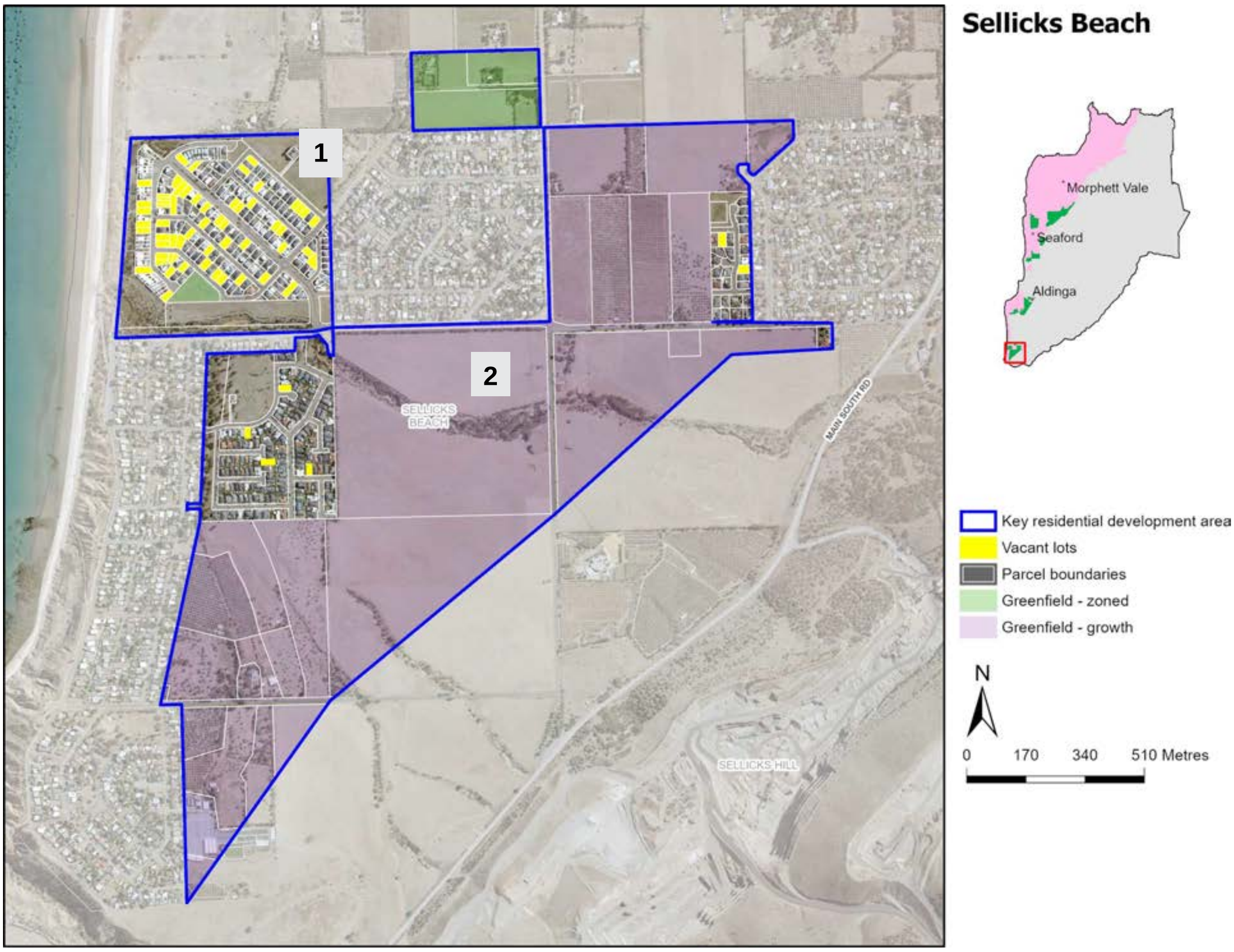
KEY MEASURES

Year Commenced	Pre-2010
Estimated dwelling potential	2,443
Dwellings built since 2010	1,613
Average dwellings built per annum	154
Remaining Potential Capacity	**830**
Vacant lots	77
Development Ready (proposed lots)	733
Undeveloped Zoned	20

ANALYSIS

- Seaford Meadows comprises a range of dwellings types and allotment sizes, with numerous smaller lots focused around public open spaces.
- Dwelling construction peaked in 2010 with 360 completions.
- The development has averaged in excess of 150 dwelling completions a year since its commencement.
- The final major land release proposes an additional 700 lots, which was recently approved.

Figure 37: Sellicks Beach



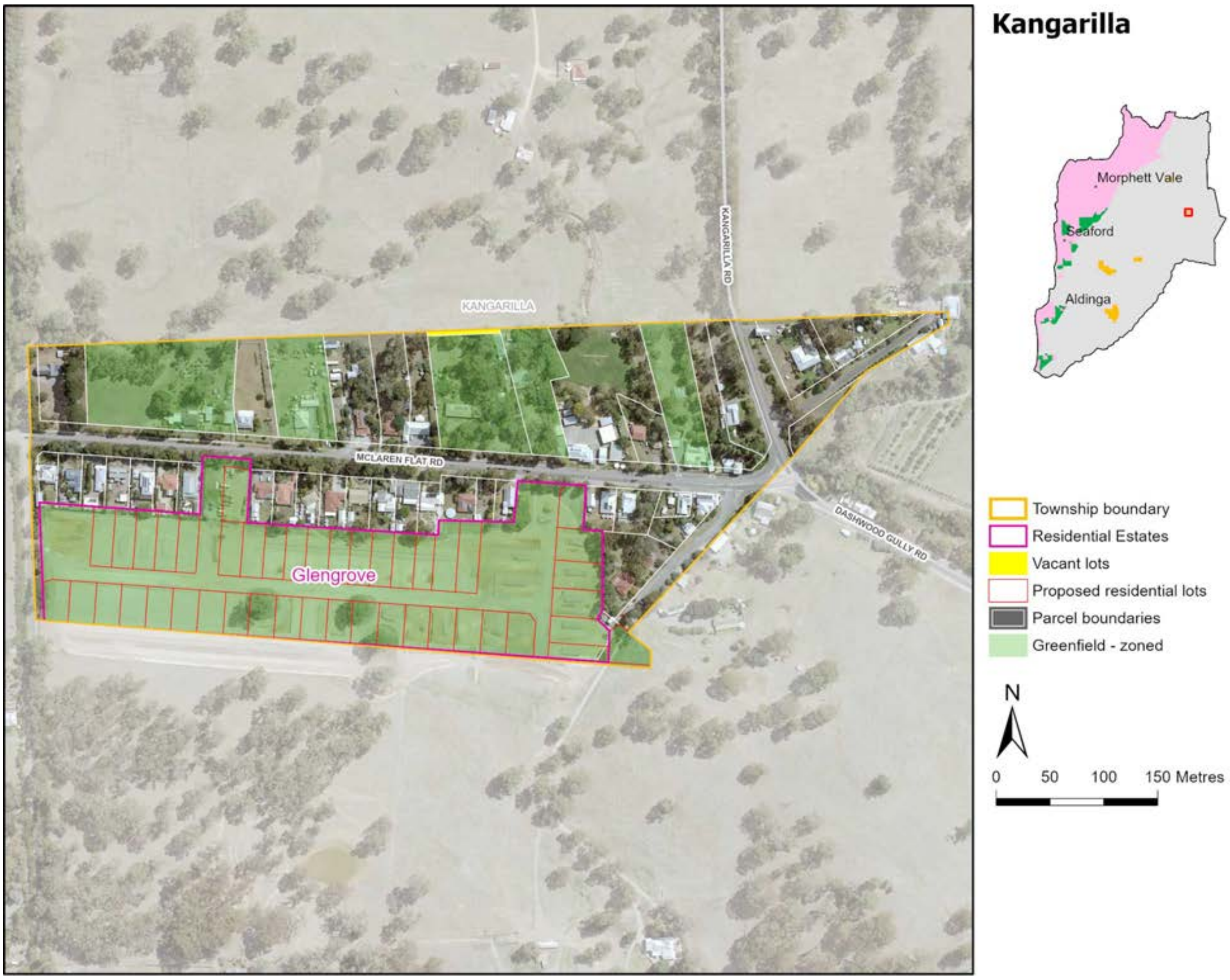
KEY MEASURES

Year Commenced	Pre-2010
Estimated dwelling potential	2,001
Dwellings built since 2010	149
Average dwellings built per annum	14
Remaining Potential Capacity	**1,852**
Vacant lots	62
Development Ready (proposed lots)	0
Undeveloped Zoned	90
Future Urban growth area	1,700

ANALYSIS

- Comprises 2 development areas, which are numbered in Figure 37.
- Development Area 1 commenced in 2001, and has been averaging 14 dwellings per annum since 2010.
  - This development area is serviced by a Community Waste Treatment Facility located in the north-eastern corner of the site.
- Development Area 2 is identified within *The 30 Year Plan for Greater Adelaide - 2017 Update* as a Future Urban growth area and has an estimated potential for 1,700 dwellings.
  - The land appears to have fragmented ownership which may make the co-ordination of development and infrastructure more complex.
- A structure plan for Sellicks Beach, which includes the future urban growth area land, is currently being undertaken by Council.

Figure 38: Kangarilla



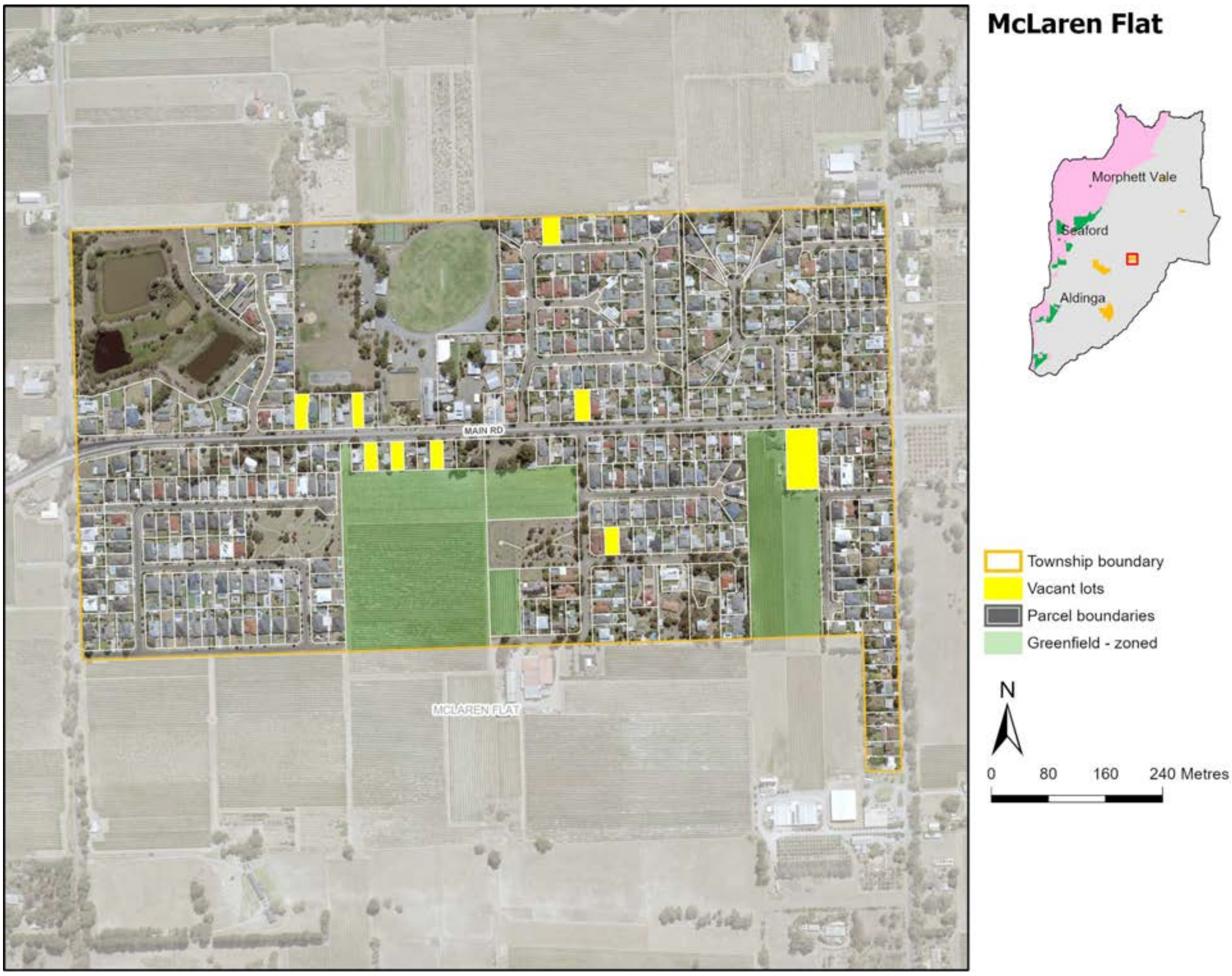
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	1
Average dwellings built per annum	-
Remaining Potential Capacity	**68**
Vacant lots	0
Development Ready (proposed lots)	44
Undeveloped Zoned	24
Future Urban growth area	0

ANALYSIS

- There is currently 1 active residential estate within the township, referred to as Glengrove. This estate proposes 44 allotments, and is located southern side of McLaren Flat Road.
- The northern settlement of Kangarilla (not shown on the map) is located within the Character Preservation District (McLaren Vale) and therefore currently has no scope for future development.
- All surrounding land is located within the Character Preservation District (McLaren Vale) and is therefore unable to be considered for future expansion in the short to medium term.

Figure 39: McLaren Flat



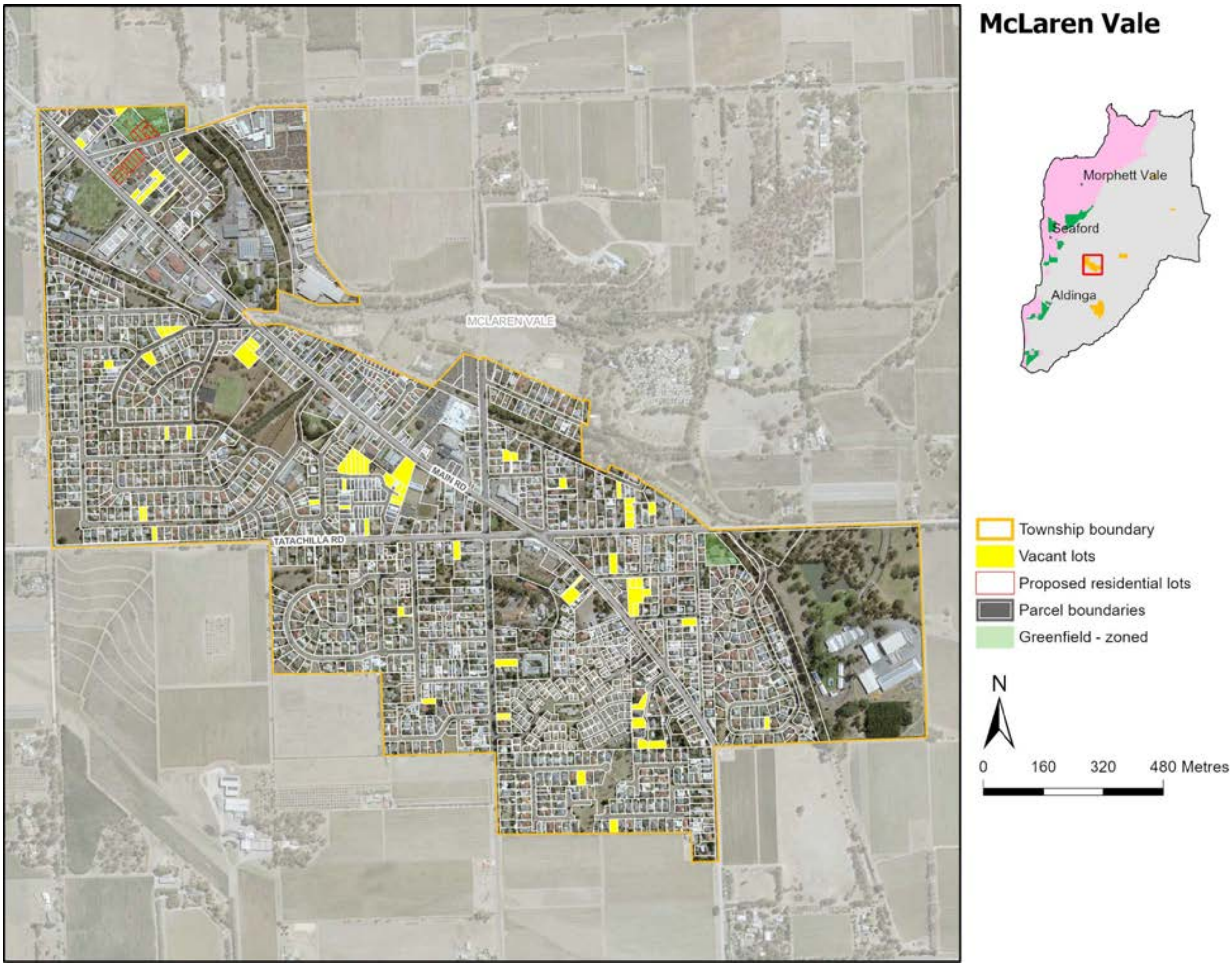
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	89
Average dwellings built per annum	8
Remaining Potential Capacity	**100**
Vacant lots	10
Development Ready (proposed lots)	0
Undeveloped Zoned	90
Future Urban growth area	0

ANALYSIS

- Residential growth within the township is limited to Greenfield development.
- There are currently no active development fronts within the township.
- McLaren Flat has a latent capacity for 90 additional allotments estimated over land currently zoned.
- It sits adjacent valuable primary production (viticultural) land on all boundaries, including ancillary support industries.
- Township expansion is constrained by the Character Preservation District (McLaren Vale) boundary.

Figure 40: McLaren Vale



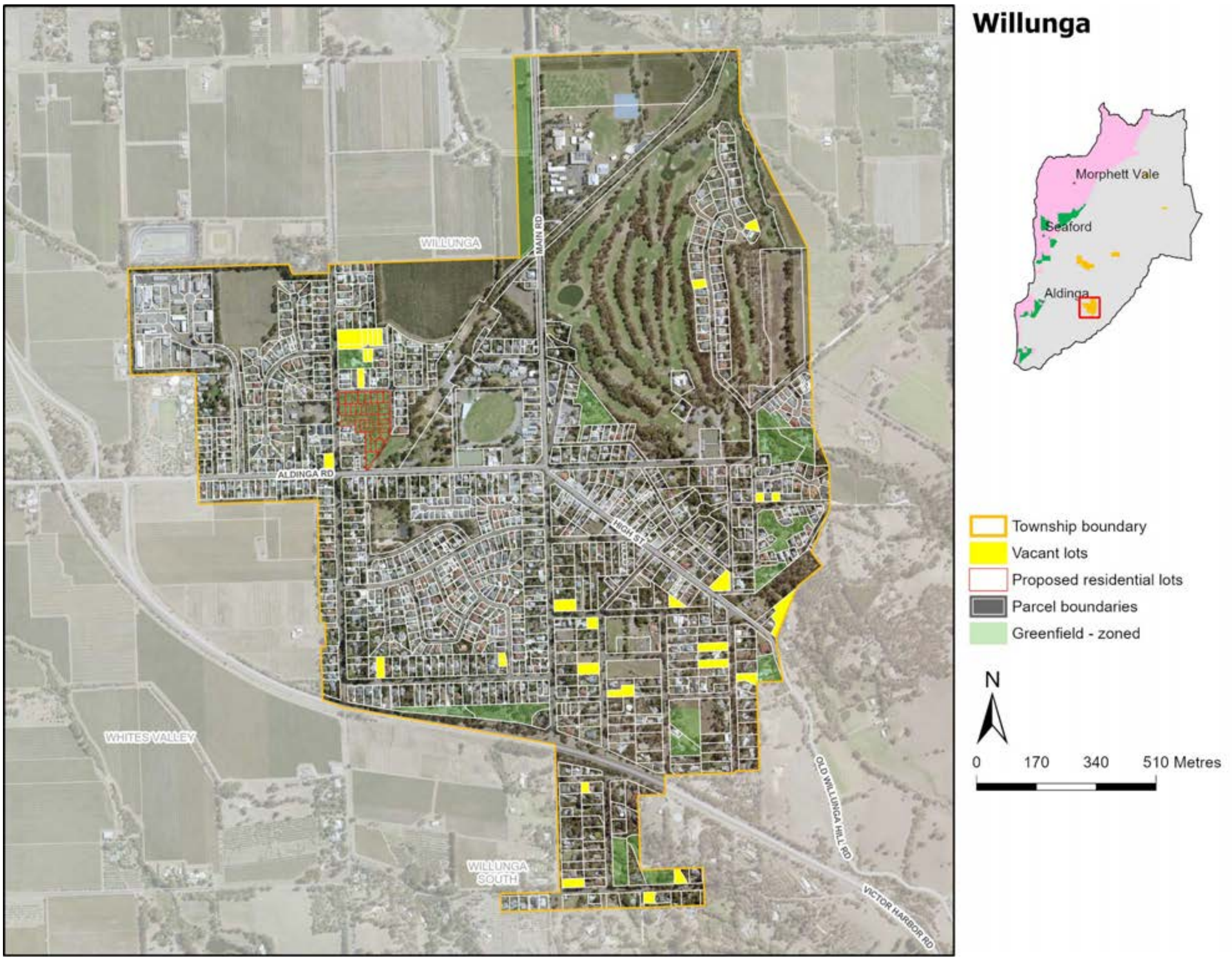
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	155
Average dwellings built per annum	16
Remaining Potential Capacity	**122**
Vacant lots	70
Development Ready (proposed lots)	13
Undeveloped Zoned	28
Future Urban growth area	0

ANALYSIS

- Supply of greenfield land within the township has been exhausted. Scattered pockets of Greenfield Undeveloped Zoned land provide limited opportunities for infill development within the township.
- The proposed duplication of Victor Harbor Road from Main South Road to McLaren Vale may drive future demand.
- Increased development of the tourism sector is also driving demand for different types of accommodation to be provided within the district, including the township itself.
- Future township expansion is constrained by the Character Preservation District (McLaren Vale).

Figure 41: Willunga



KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	97
Average dwellings built per annum	10
Remaining Potential Capacity	**232**
Vacant lots	18
Development Ready (proposed lots)	31
Undeveloped Zoned	183
Future Urban growth area	0

ANALYSIS

- Residential growth within the township is mainly limited to Greenfield development.
- Scattered pockets of Greenfield Undeveloped Zoned land have capacity to provide around 214 dwellings. The actual amount may not be achieved due to the highly vegetated nature and location of some of these sites.
- The proposed duplication of Victor Harbor Road from Main South Road to McLaren Vale may drive demand.
- Future township expansion is constrained by the *Character Preservation District (McLaren Vale)* boundary.

3.6 Summary

The Outer South is the region that faces that greatest constraint in terms of Greenfield land supply (Development Ready, Undeveloped Zoned and Future Urban). One of the features of the Outer South is the range of picturesque township that are located in the rural hinterland. Both the Township boundaries and any additional supply of Greenfield land are constrained by the Character Preservation District (McLaren Vale)

Greenfield land supply in the Outer South Region can be summarised as follows:

- 1,800 Development Ready allotments.
- Capacity to accommodate an additional 2,400 allotments on Undeveloped Zoned land.
- Capacity to accommodate an additional 4,900 allotments on identified Future Urban growth areas.
- Government owned land holdings in Aldinga and Hackham.
- Range of key infrastructure upgrades required in roads and education that will continue to support future development.
- In addition to the above, as of June 2020 there were 600 vacant allotments. These have not been included in the analysis of available Greenfield and Township supply.

This is the region that requires the most urgent action to address Greenfield land supply.

Growth Scenarios

Under a medium growth scenario, it is estimated that Greenfield and Township development would need to produce an additional 280 dwellings a year. The high growth scenario will require an additional 4,100 dwellings to 2030.

4. GREENFIELD AND TOWNSHIP LAND SUPPLY – ADELAIDE HILLS

4.1 Overview

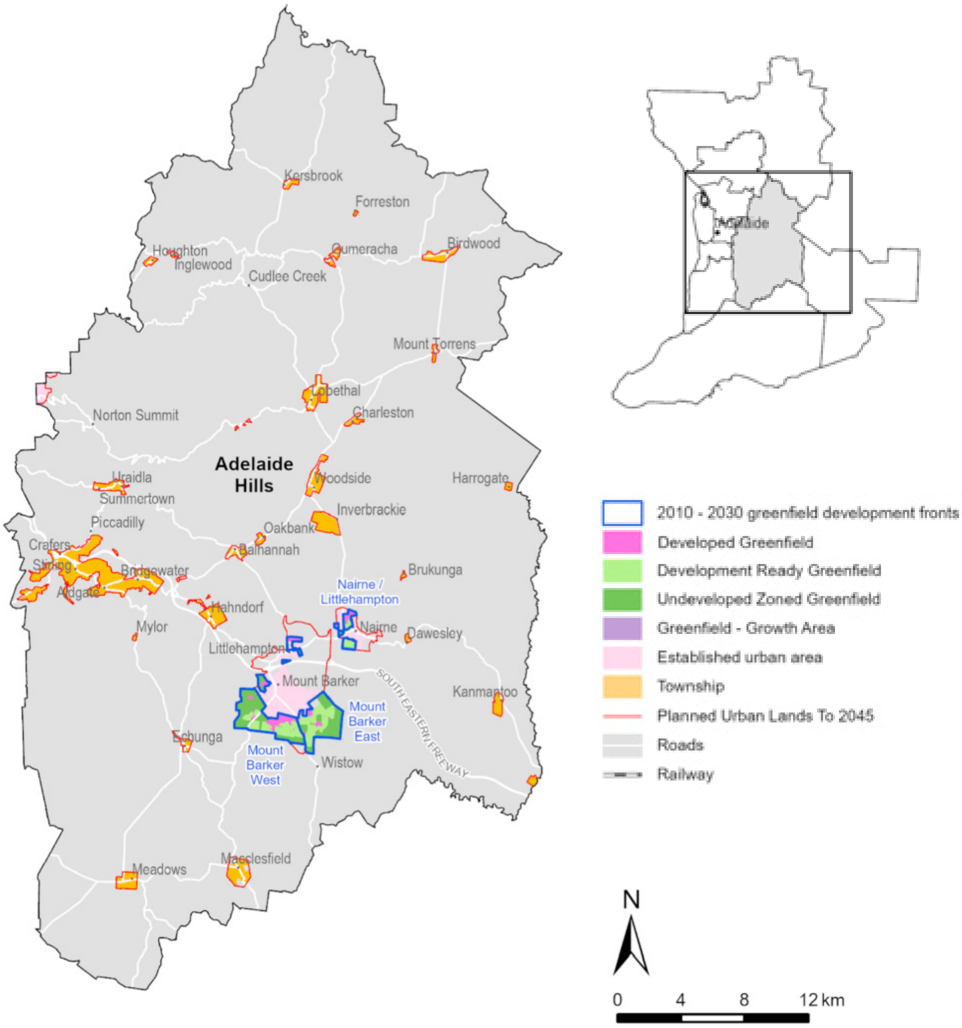
The Adelaide Hills region sits to the east of Metropolitan Adelaide, as illustrated in Figure 42. The region comprises both traditional Greenfield residential land supply, predominantly located at Mount Barker, and Township residential land supply.

Numerous townships are scattered throughout the region and vary in physical size and population. Many townships are constrained from future expansion by the EFPA, but are also subject to other environmental constraints such as the Hills Face Zone, flooding and land contained within a High Bushfire Prone Areas as delineated in the Planning and Design Code (P&D Code).

Key facts about the Adelaide Hills Region include:

- It contains the Local Government Area of Adelaide Hills and Mount Barker District Council.
- Mount Barker accommodates the majority of population and dwelling growth, and this is projected to continue.
- The region has greater estimated potential for growth on Greenfield and Township land than the Outer South.

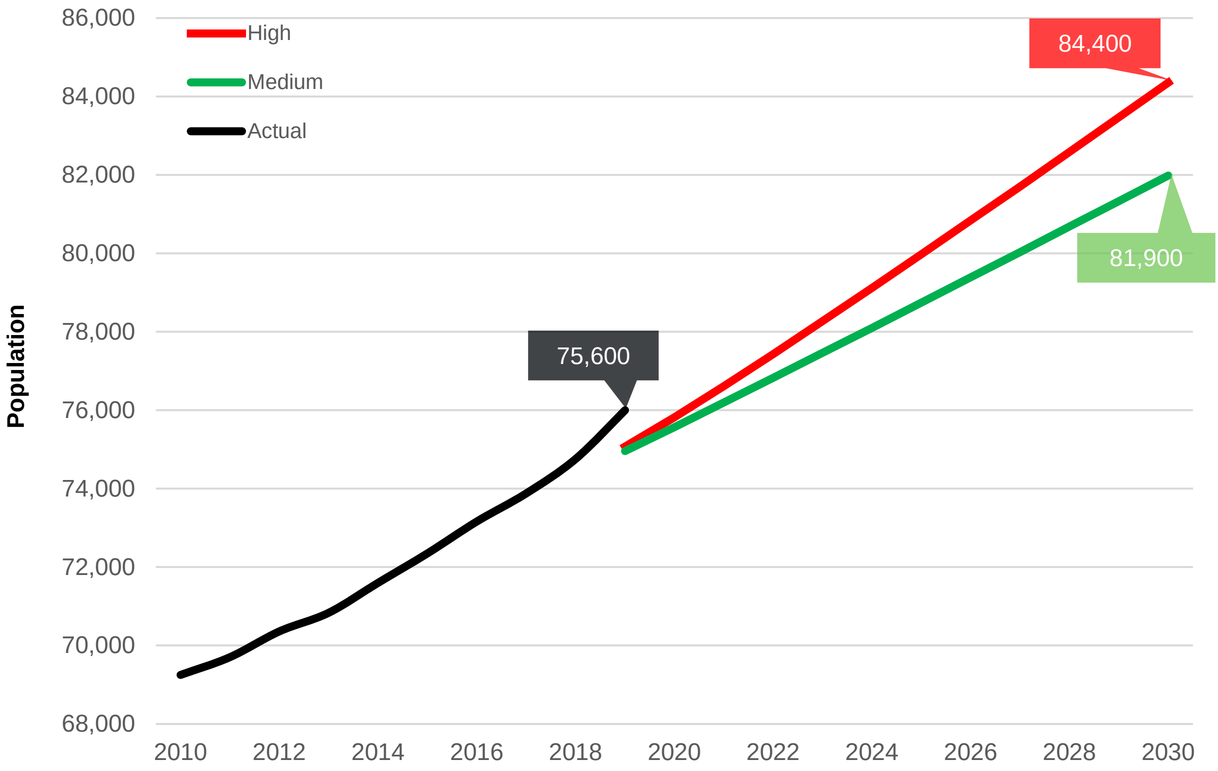
Figure 42: Adelaide Hills region geography



Population

- Between 2010 and 2019 the region grew by 6,750 persons, at an average annual rate of 1.0%.
- In 2020 the projected population for the region was 75,600.
- Figure 43 shows actual growth to 2019, and projected growth from 2020 to 2030 for both a medium and high growth scenario.
- The chart clearly shows a rapid acceleration in population growth since 2017 and this is consistent with the sharp increase in recent dwelling completions within the Mount Barker region, as shown in Figure 43.

Figure 43: Population growth 2010 - 2030



Housing Demand

- Between 2010 and June 2020 a total of 4,700 dwellings were constructed.
- Under a medium growth scenario, between 2020 and 2030, there is an estimated requirement for 3,000 additional dwellings with 2,300 to be built on Greenfield.
- Under a high growth scenario, between 2020 and 2030, there is an estimated requirement for 4,000 additional dwellings with 3,000 to be built on Greenfield.

Land Supply

At June 2020:

- There was an estimated supply of 4,400 Development Ready Greenfield and Township allotments within the region; and
- potential for an estimated 8,600 allotments on Undeveloped Zoned land with the majority of this land located within the Mount Barker growth area.

4.2 Recent development trends, 2010 – 2019

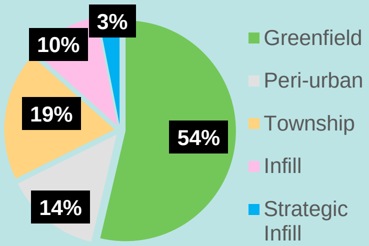
DWELLINGS BUILT

4,700 (gross)

4,500 (net)

450 p.a

DEVELOPMENT TYPE



DWELLING TYPE

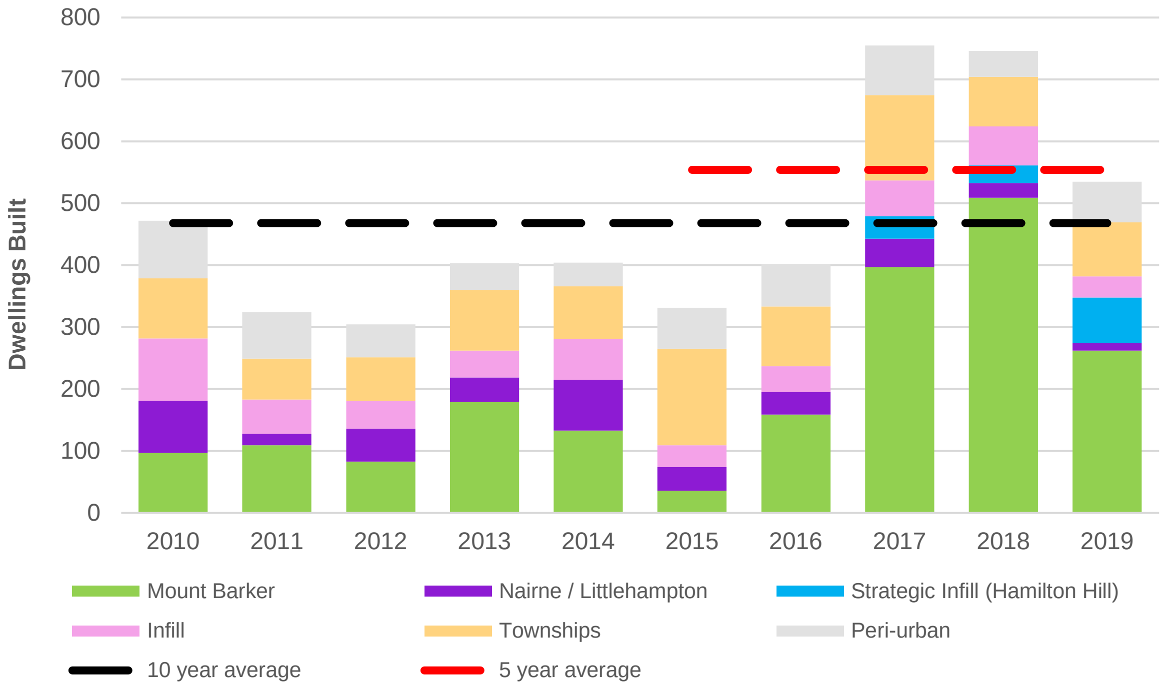
86% Detached

5% Home Unit / Townhouse

Over this period the following development trends have emerged within the region:

- A total 4,700 dwellings were completed, with a net gain of 4,500 dwellings once demolitions were accounted for.
- Detached dwellings accounted for 86% of total dwellings built.
- Dwelling completions increased significantly in 2017 and 2018 coinciding with a surge in development at Mount Barker, as illustrated in Figure 44. This sharp increase in dwellings led to a steep increase of the population in June 2019, as shown in Figure 43.
- Greenfield development (Mt Barker, Littlehampton and Nairne) accounted for 54% of total dwellings built, with a further 19% within identified Townships. However over the last two years the share of dwellings from Greenfield has increased significantly as a result of increased activity in the Mount Barker growth areas, which is likely to continue as development matures.
- Mount Barker accounted for over 40% of total dwellings built over this period followed by Nairne which added a further 14%.

Figure 44: Gross number of dwellings built by year, 2010 - 2019



4.3 Future demand, 2020 – 2030

POPULATION CHANGE

6,400 (medium)
640p.a

8,500 (high)
850p.a

TOTAL DWELLING DEMAND

3,000 (medium)
4,000 (high)

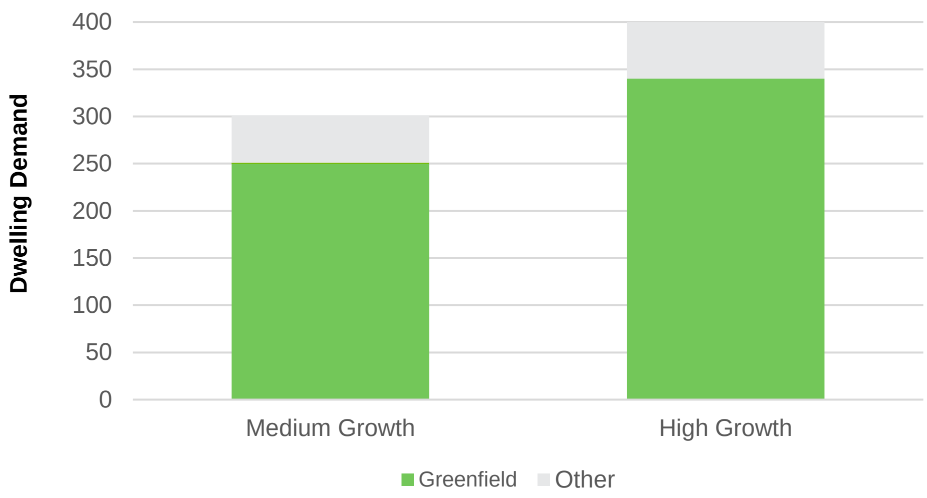
GREENFIELD & TOWNSHIP DWELLING DEMAND

2,500 (medium)
3,400 (high)

The report provides a medium and a high growth scenario for both projected population and dwelling demand. This has been prepared to assist strategic and infrastructure planning at a local and state government level because decision and policy makers must be cognisant of the impacts that both scenarios are likely to have on future demand for land, services and critical infrastructure.

Projected population growth and average dwelling size were used to estimate dwelling demand for both medium and high growth scenarios, as shown in Figure 45.

Figure 45: Projected annual dwelling demand to 2030



Analysis of these projections indicates:

- Under a medium growth scenario, it is estimated an additional 250 dwellings per annum would be required from both Greenfield and Township development to accommodate projected growth.
- Under a high growth scenario, it is estimated an additional 340 dwellings per annum would be required from both Greenfield and Township development to accommodate projected growth. This would align with more recent development trends.
- It should be noted that since 2017, development in the Mount Barker growth area has doubled its 10 year annual average. It is envisaged that this will likely continue, at least in the short term, with the current Home Builder Scheme stimulus grant increasing demand for land.

4.4 Greenfield and Township land supply to 2030

DEVELOPMENT READY	UNDEVELOPED ZONED	FUTURE URBAN GROWTH
4,400 lots	**8,600** Estimated lots	**400** Estimated lots

Greenfield and Township development accounted for 75% of total dwellings built within the region since 2010. This trend is assumed to continue as new land becomes available within Mount Barker and Nairne.

A stocktake of Greenfield and Township land supply within the region, as shown in Figure 46 and Table 6, indicates that:

- Over 30% of allotment potential is Development Ready.
- A total of 3,700 of these allotments are located within the Mount Barker growth area.
- 64% of estimated allotment potential is located on Undeveloped Zoned land (mostly in Mount Barker).
- The Mount Barker growth areas have an estimated potential for an additional 7,000 allotments on Undeveloped Zoned land.
- The Adelaide Hills region has the smallest amount of identified Future Urban Growth area land with an estimated potential for a further 400 allotments.

Figure 46: Greenfield and Township land supply by development front, June 2020

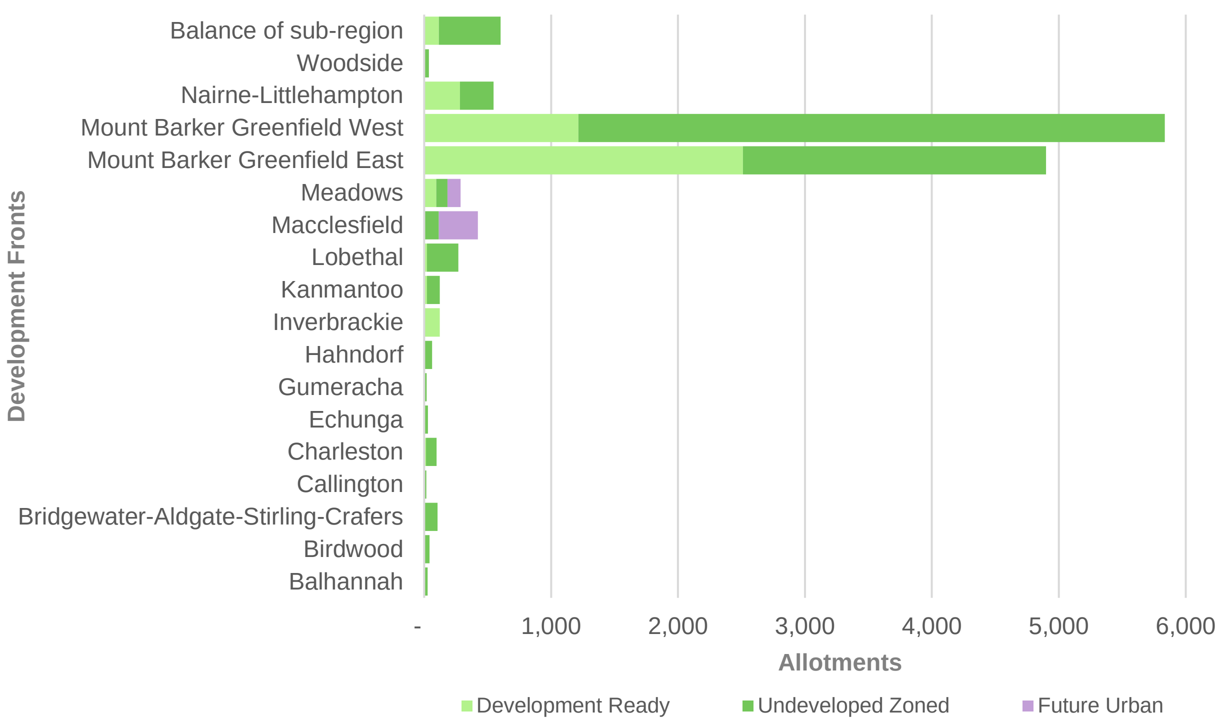


Table 6: Greenfield and Township land supply by development front - Adelaide Hills, June 2020

STATUS	DEVELOPMENT READY		UNDEVELOPED ZONED		FUTURE URBAN GROWTH AREA	
Development Fronts	Area (ha)	Lots	Area (ha)	Estimated Lots	Area (ha)	Estimated Lots
Balhannah	-	-	4	28	-	-
Birdwood	1	5	6	37	-	-
Bridgewater-Aldgate-Stirling-Crafers	2	4	45	100	-	-
Callington	-	-	3	18	-	-
Charleston	2	15	11	82	-	-
Echunga	-	-	3	29	-	-
Gumeracha	-	-	3	20	-	-
Hahndorf	0	1	21	61	-	-
Inverbrackie	20	122	-	-	-	-
Kanmantoo	4	22	17	100	-	-
Lobethal	3	23	29	245	-	-
Macclesfield	1	8	13	107	38	309
Meadows	15	96	13	87	16	104
Mount Barker East	215	2,512	205	2,388	-	-
Mount Barker West	108	1,216	411	4,618	-	-
Nairne-Littlehampton	38	281	36	266	-	-
Woodside	1	4	5	34	-	-
Balance of region	8	95	29	344	0	0
TOTAL	**417**	**4,404**	**854**	**8,564**	**54**	**413**

*Precincts shaded green are identified as Greenfield development areas, and precincts shaded yellow are identified as Townships.

4.5 Key Greenfield and Township development fronts

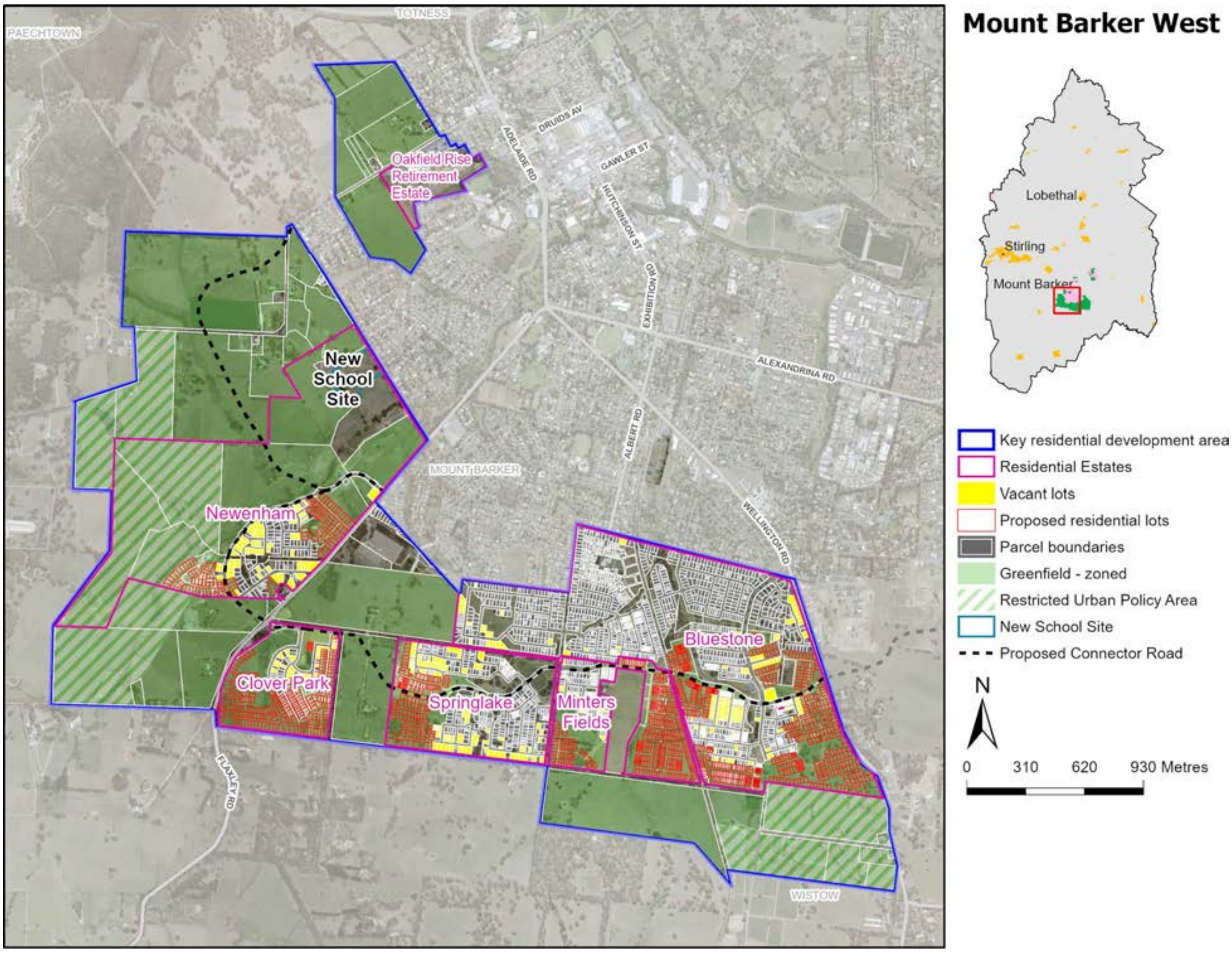
The following section provides analysis on Greenfield and Township development and land supply for the following precincts:

- Mount Barker West
- Mount Barker East
- Nairne / Littlehampton
- Meadows

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, key residential estates, vacant land supply (as of June 2020), proposed lots (June 2020) and land supply sources (Undeveloped Zoned and Future Urban Growth Area);
- A table summarising key measures, including total number of dwelling built to June 2020, and a breakdown of available land supply as of June 2020, by the following categories:
    - Vacant lots
    - Development Ready (proposed lots)
    - Undeveloped Zoned (estimated yield)
    - Future Urban Growth Area (estimated yield)
- Overview of development trends, land supply and infrastructure.

Figure 47: Mount Barker West



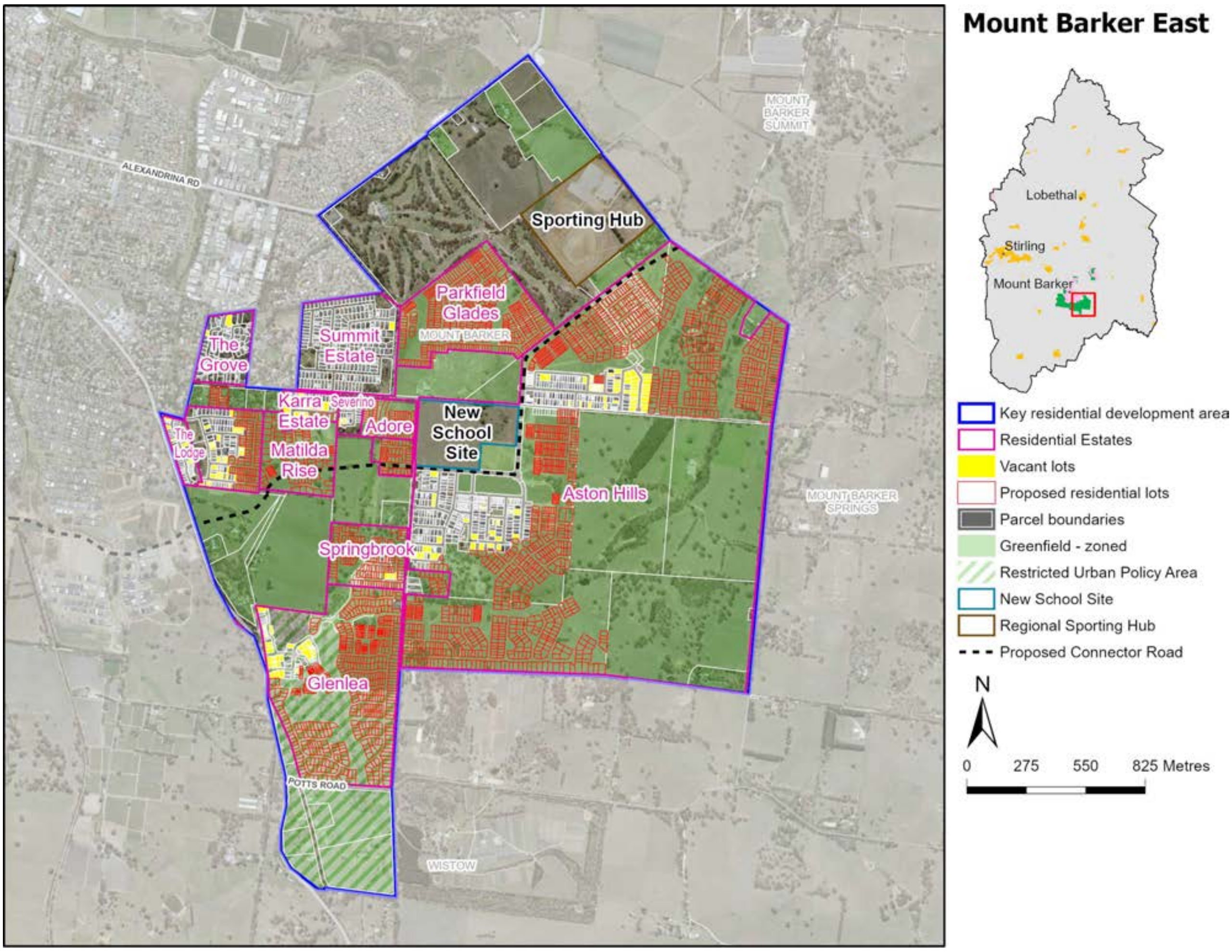
KEY MEASURES

Year Commenced	2008
Estimated dwelling capacity	7,639
Dwellings built	1,407
Average dwellings built per annum	134
Remaining Potential Lots:	**6,232**
Vacant lots	398
Development Ready (proposed lots)	1,216
Undeveloped Zoned	4,618

ANALYSIS

- Mount Barker West has 6 active residential estates.
- The largest of these estates, 'Bluestone' has produced just under 1,000 dwellings to date.
  - In addition Bluestone, as of June 2020, had 180 vacant allotments and a proposal for an additional 427 allotments.
- Kings Baptist Grammar School is set to open in 'Newenham estate' in 2023.
  - Shared use agreements reached between the developer, school and Council will allow open space associated with the school to be used by community members outside school hours.
- Portions of the Heysen Boulevard have been constructed within all active residential estates in the western portion of Mount Barker.
- A Restricted Urban Policy Area covers some of this land (see Figure 47) and limits residential development until interface issues with adjacent agricultural and intensive animal keeping uses are resolved or become manageable.
- Since June 2020 a plan of division has been lodged over land within this restricted policy area to the south-east, proposing over 200 lots.

Figure 48: Mount Barker East



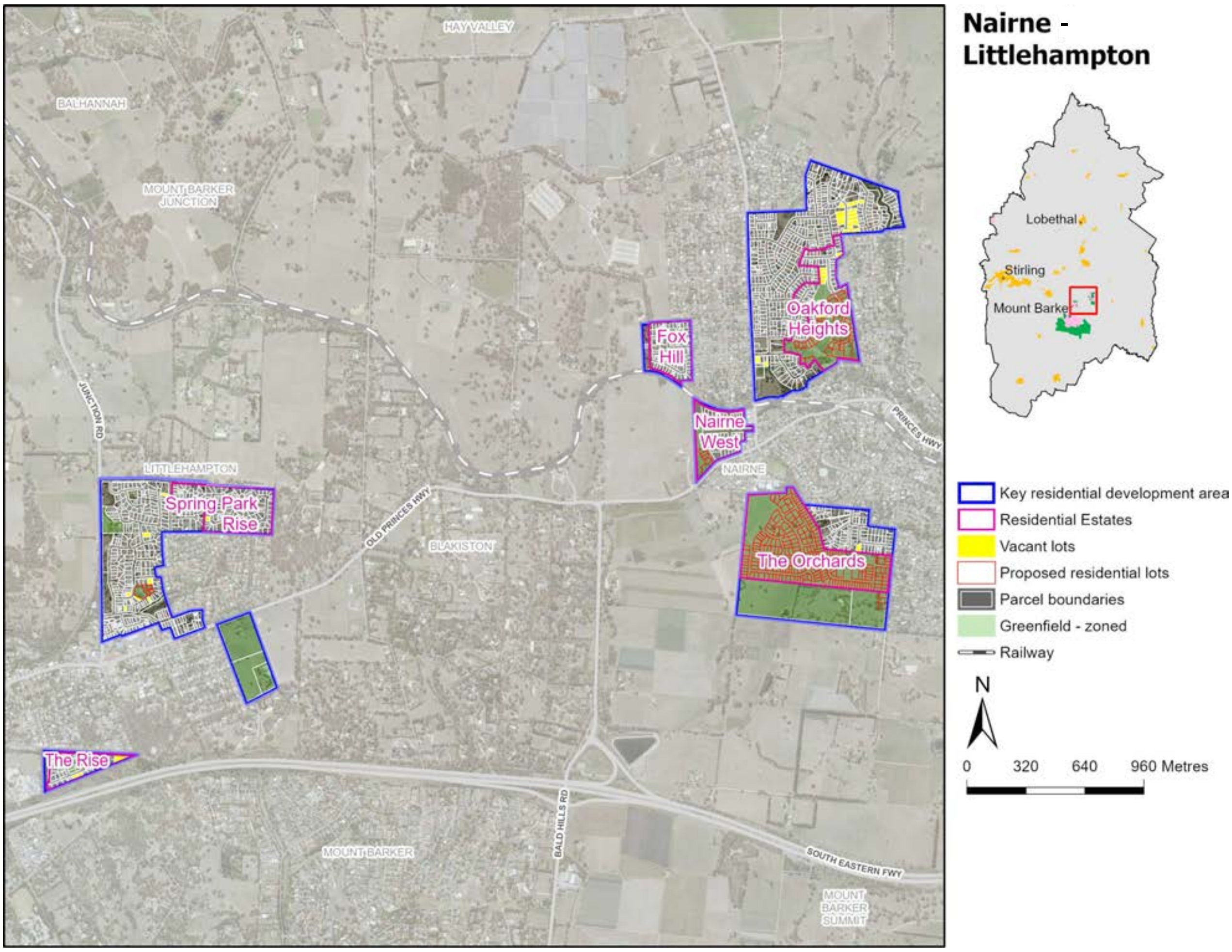
KEY MEASURES

Year commenced	**2010**
Estimated dwelling capacity	5,769
Dwellings built	680
Average dwellings built per annum	65
Remaining Potential Lots:	**5,089**
Vacant lots	189
Development Ready (proposed lots)	2,512
Undeveloped Zoned	2,388

ANALYSIS

- Mount Barker East has 11 active residential estates.
- The largest estate, ‘Aston Hills’, has produced over 300 dwellings since 2010, with a current proposal seeking an additional 1,100 allotments.
- Aston Hills, once completed, will comprise a new school and retail centre.
- The regional sporting hub is currently under construction and is located off Springs Road.
- Only a small portion of the Heysen Boulevard (connector road) has been completed, this section runs through Aston Hills.
- ‘Summit Estate’ and ‘The Grove’ are all but complete with only a small number of vacant lots remaining.
- Land to the south is located within a Restricted Urban Policy Area which limits residential development until interface issues with adjacent agricultural and intensive animal keeping uses are resolved or become manageable.

Figure 49: Nairne - Littlehampton



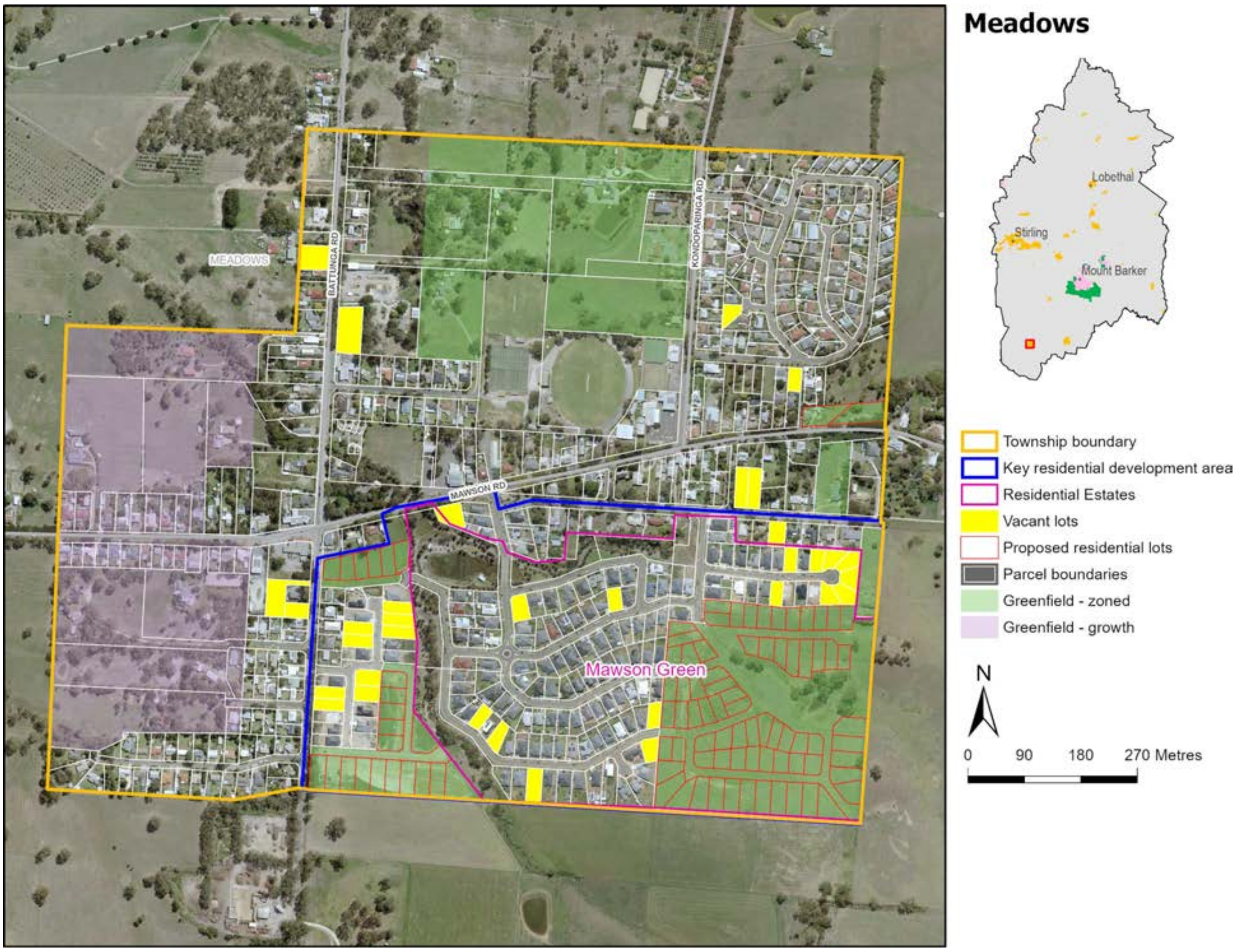
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built	671
Average dwellings built per annum	64
Remaining Potential Lots:	**639**
Vacant lots	92
Development Ready (proposed lots)	281
Undeveloped Zoned	266

ANALYSIS

- Once the vacant lots, Development Ready and Undeveloped Zoned land have been consumed there are no additional opportunities for Township expansion given the current extent of the *Environment and Food Production Area* (EFPA).
- This is likely to drive demand for infill development, particularly within the township of Nairne.
- Renewal of the Main Road precinct in the township of Nairne is being considered by Council. This would generate opportunities to provide medium density development and additional services and facilities for residents.

Figure 50: Meadows



KEY MEASURES

Year Commenced	Pre-2010
Dwellings built	131
Average dwellings built per annum	12
Remaining potential lots:	**313**
Vacant lots	26
Development Ready (proposed lots)	96
Undeveloped Zoned	87
Future Urban growth area	104

ANALYSIS

- An estimated a yield of 96 dwellings could be achieved on Undeveloped Zoned land to the north.
- An estimated further 104 dwellings could be achieved on Future Urban growth area land to the west. Bringing this land to market would generate sufficient supply beyond 2030.

4.6 Summary

Mount Barker East and Mount Barker West are the main areas of Greenfield land supply in the Adelaide Hills Region. There are also identified supplies within the townships of Meadows and Nairne-Littlehampton.

Greenfield and Township land supply in the Adelaide Hills Region can be summarised as follows:

- 4,400 Development Ready allotments, 80% of which are located within the Mount Barker growth area.
- Capacity to accommodate an estimated 8,600 allotments on Undeveloped Zoned land.
- Capacity to accommodate an estimated 400 allotments on identified Future Urban Growth areas.
- A range of key infrastructure upgrades required in roads and education that will continue to support future development.
- In addition to the above, as of June 2020 there were 1,200 vacant allotments, the majority of which are located within the Mount Barker growth area. These have not been included in the analysis of available Greenfield and Township supply.

Growth Scenarios

Under a medium growth scenario, Greenfield and Township development would need to produce an additional 250 dwellings per year. Under a high growth scenario, Greenfield and Township development would need to produce an additional 340 dwellings a year.

5. TOWNSHIP LAND SUPPLY – FLEURIEU PENINSULA

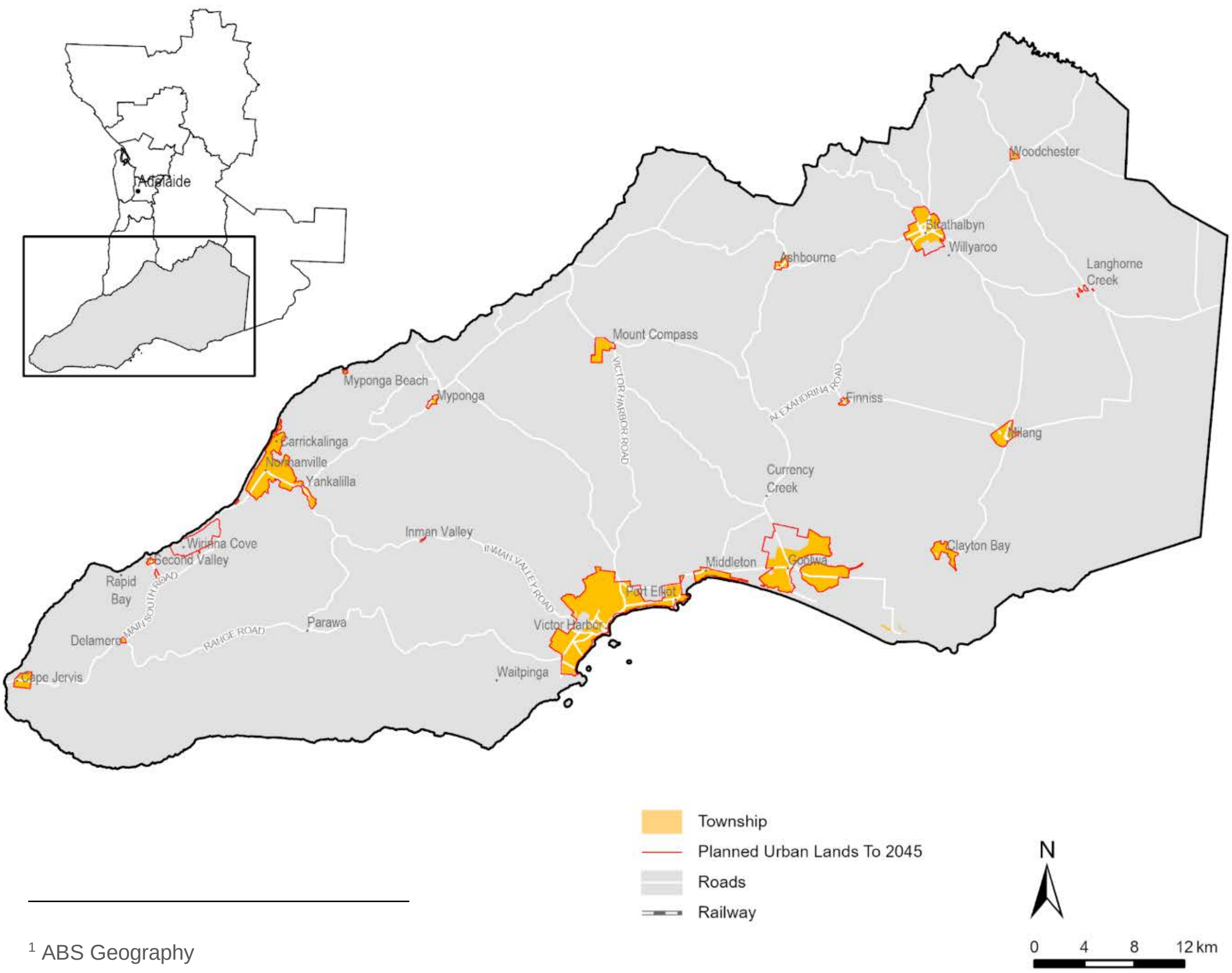
5.1 Overview

The Fleurieu Peninsula region sits outside the Greater Adelaide Capital City (GACC) Statistical Area[1], and comprises a number of significant townships, as shown in Figure 51. These townships vary in size and population, and levels of access to services, facilities and critical infrastructure. This section reports on the Greenfield land within these townships.

Key facts about the Fleurieu Peninsula Region include that:

- It contains the Local Government Areas (LGA's) of Alexandrina Council, Victor Harbor (City) Council and the District Council of Yankalilla.
- Large portions of the region are dedicated to primary production, which are protected by the current extent of the *Environment and Food Production Area* (EFPA). This restricts the ability to expand existing township boundaries.
- There is also a rezoning proposal currently under consideration which seek to rezone Future Urban growth area land in Goolwa to residential.

Figure 51: Fleurieu Peninsula region geography

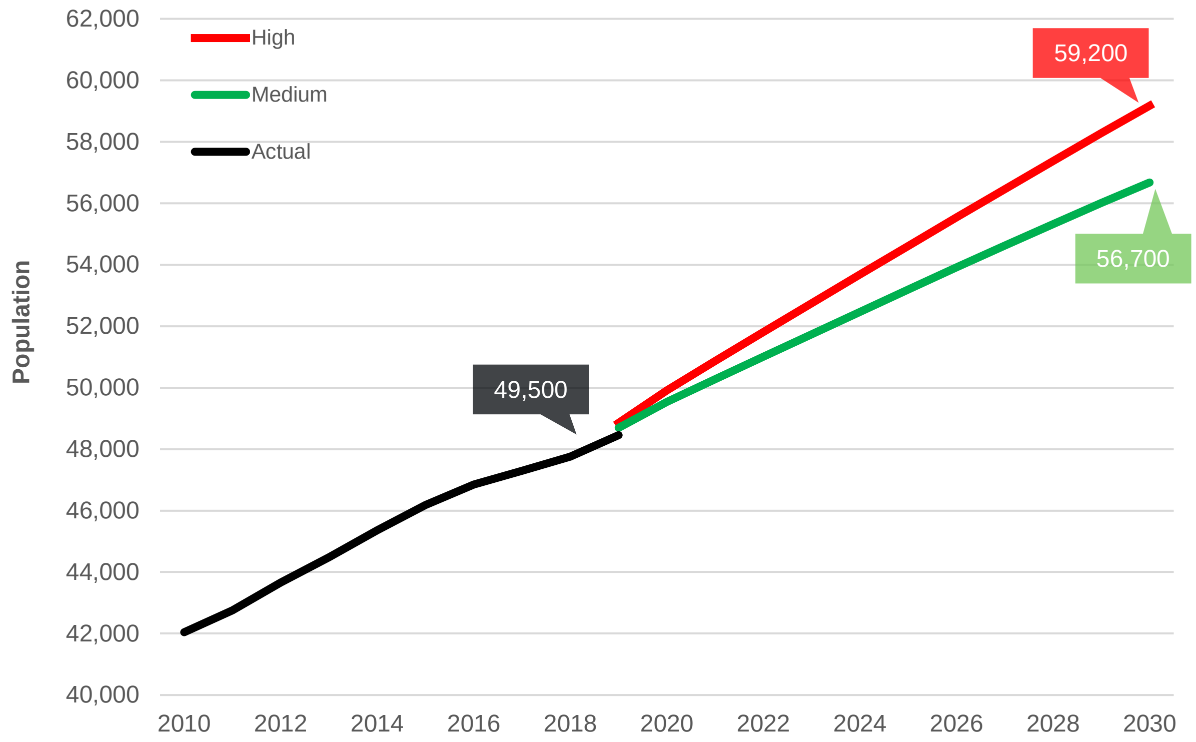


[1] ABS Geography

Population

- Between 2010 and 2019 the region grew by 6,400 persons, at an average annual rate of 1.7%.
- In 2020, the projected population for the region was 49,500.
- Figure 52 shows actual growth to 2019, and the projected growth to 2030 for both medium and high growth scenarios.

Figure 52: Population growth 2010 – 2030



Housing Demand

- Between 2010 and June 2020 a total of 4,700 dwellings were constructed.
- Under a medium population growth scenario there is an estimated requirement for 4,200 additional dwellings between 2020 and 2030, with 3,800 to be built on Township land.
- Under a high population growth scenario there is an estimated requirement for 5,300 additional dwellings between 2020 and 2030, with 4,800 to be built on Township land.

Land Supply

At June 2020:

- There were an estimated 2,100 Development Ready township allotments within the region; and
- Potential for an estimated 5,400 allotments on Undeveloped Zoned land.

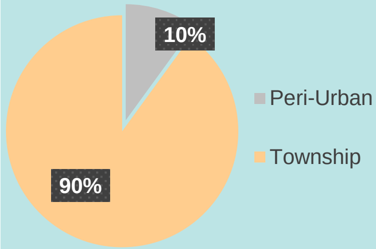
5.2 Recent development trends, 2010 – 2019

DWELLINGS BUILT

4,700 (gross)

470p.a (average)

DEVELOPMENT TYPE



DWELLING TYPE

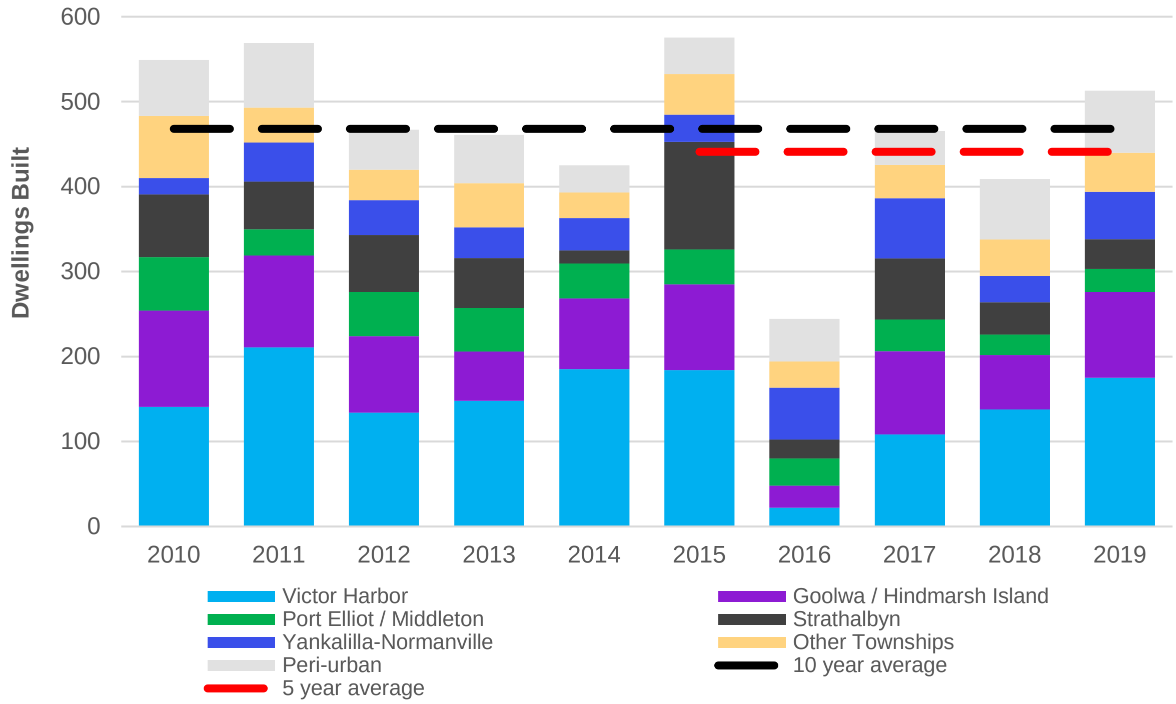
91% Detached

2% Retirement Village Units

Over this period the following development trends have emerged within the region:

- A total 4,700 dwellings were completed.
- Detached dwellings accounted for 91% of all completions.
- Dwellings completions peaked in 2015 as result of a development surge mainly within Strathalbyn, as illustrated in Figure 53.
- 90% of dwellings were built within identified townships[2].
- Strathalbyn accommodated 14% of total dwellings built within the region.
- Figure 53 illustrates the importance of Victor Harbor to the region, underpinning growth. This was emphasised in 2016 when the region recorded its lowest rate of dwelling completions, which directly correlated with the lowest rate of dwelling completions for Victor Harbor.
- That development is dispersed across a number of townships.

Figure 53: Gross number of dwellings built by year, 2010 - 2019



[2] Greenfield land supply located in townships.

5.3 Future demand, 2020 – 2030

POPULATION CHANGE

7,100 (medium)

710p.a

9,600 (high)

960p.a

TOTAL DWELLING DEMAND

4,100 (medium)

5,200 (high)

TOWNSHIP DWELLING DEMAND

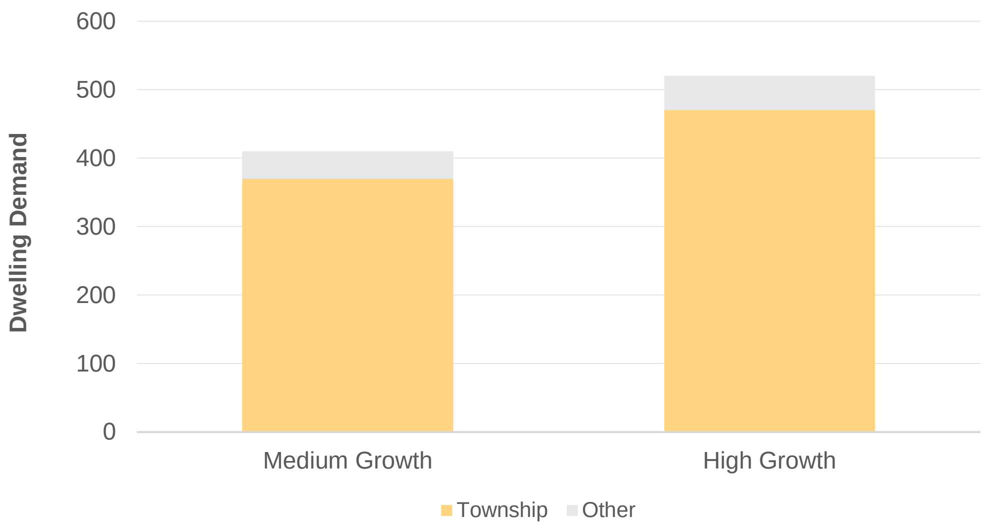
3,700 (medium)

4,700 (high)

The report provides a medium and a high growth scenario for both projected population and dwelling demand. This has been prepared to assist strategic and infrastructure planning at a local and state Government level because decision and policy makers must be cognisant of the impacts that both scenarios are likely to have on future demand for land, services and critical infrastructure.

Projected population growth and average dwelling size were used to estimate dwelling demand for a medium and high growth scenario, as shown in Figure 54.

Figure 54: Projected annual dwelling demand to 2030



Analysis of these projections indicate:

- Under a medium growth scenario it is estimated that an additional 370 dwellings per annum would be required from Township development, to accommodate projected growth.
- Under a high growth scenario it is estimated an additional 470 dwellings per annum would be required from Township development, to accommodate projected growth.
- COVID-19 has impacted lifestyle and work life balance demands, which are not yet fully understood, however this may, at least in the short term, boost demand for land and development within the region beyond what is captured in the projections.
- 43% of dwellings in the Goolwa-Middleton-Port Elliot area were unoccupied at the time of the 2016 ABS Census.

5.4 Township land supply to 2030

DEVELOPMENT READY	UNDEVELOPED ZONED	FUTURE URBAN GROWTH
2,100 lots	**5,400** Estimated lots	**13,800** Estimated lots

Township development accounted for 90% of total dwellings built within the region since 2010. This trend is likely to continue with demand for quick and easy access to essential services, especially with an older demographic, likely to drive growth in the larger townships over peri-urban land.

A stocktake of township land supply within the region, as shown in Figure 55 and Table 7, indicates that:

- 10% of allotments are deemed Development Ready.
- There are 842 development ready allotments located in Victor Harbor, and a further 680 within the township of Strathalbyn.
- 25% of estimated allotment potential is located within Undeveloped Zoned land.
- There is an estimated potential for 2,000 allotments on Undeveloped Zoned land at Victor Harbor.
- 65% of the estimated allotment supply for the region is located on land currently identified as Future Urban growth area.
- There is an estimated potential for 7,666 allotments on Future Urban growth area land within the Township of Goolwa, 200ha of which is currently subject to a DPA which would support further residential development.

Figure 55: Township land supply by development front, June 2020

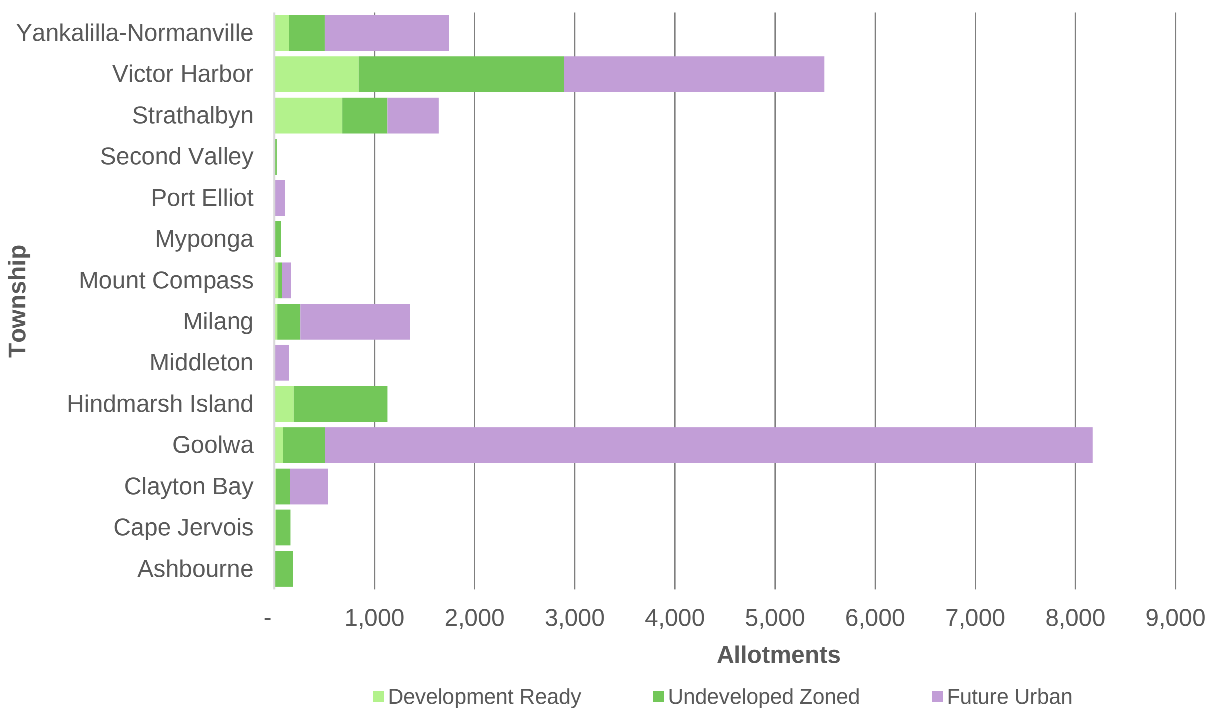


Table 7: Township land supply by development front – Fleurieu Peninsula, June 2020

STATUS	DEVELOPMENT READY		UNDEVELOPED ZONED		FUTURE URBAN GROWTH AREA	
Development Fronts	**Area (ha)**	**Lots**	**Area (ha)**	**Estimated Lots**	**Area (ha)**	**Estimated Lots**
Ashbourne	1	2	51	183	-	-
Cape Jervis	2	17	20	143	-	-
Clayton Bay	3	15	24	139	67	380
Goolwa	6	84	32	422	591	7,666
Hindmarsh Island	25	194	121	935	-	-
Middleton	-	-	0	3	21	145
Milang	2	31	18	229	88	1,092
Mount Compass	4	38	4	41	8	84
Myponga	-	-	10	68	-	-
Port Elliot	-	-	-	-	15	108
Second Valley	-	-	3	23	-	-
Strathalbyn	80	680	53	451	60	511
Victor Harbor	83	842	202	2,049	256	2,603
Yankalilla-Normanville	19	148	46	355	161	1,241
Balance of region	1	6	46	325	0	0
TOTAL	**227**	**2,057**	**631**	**5,366**	**1,266**	**13,829**

5.5 Key Township development fronts

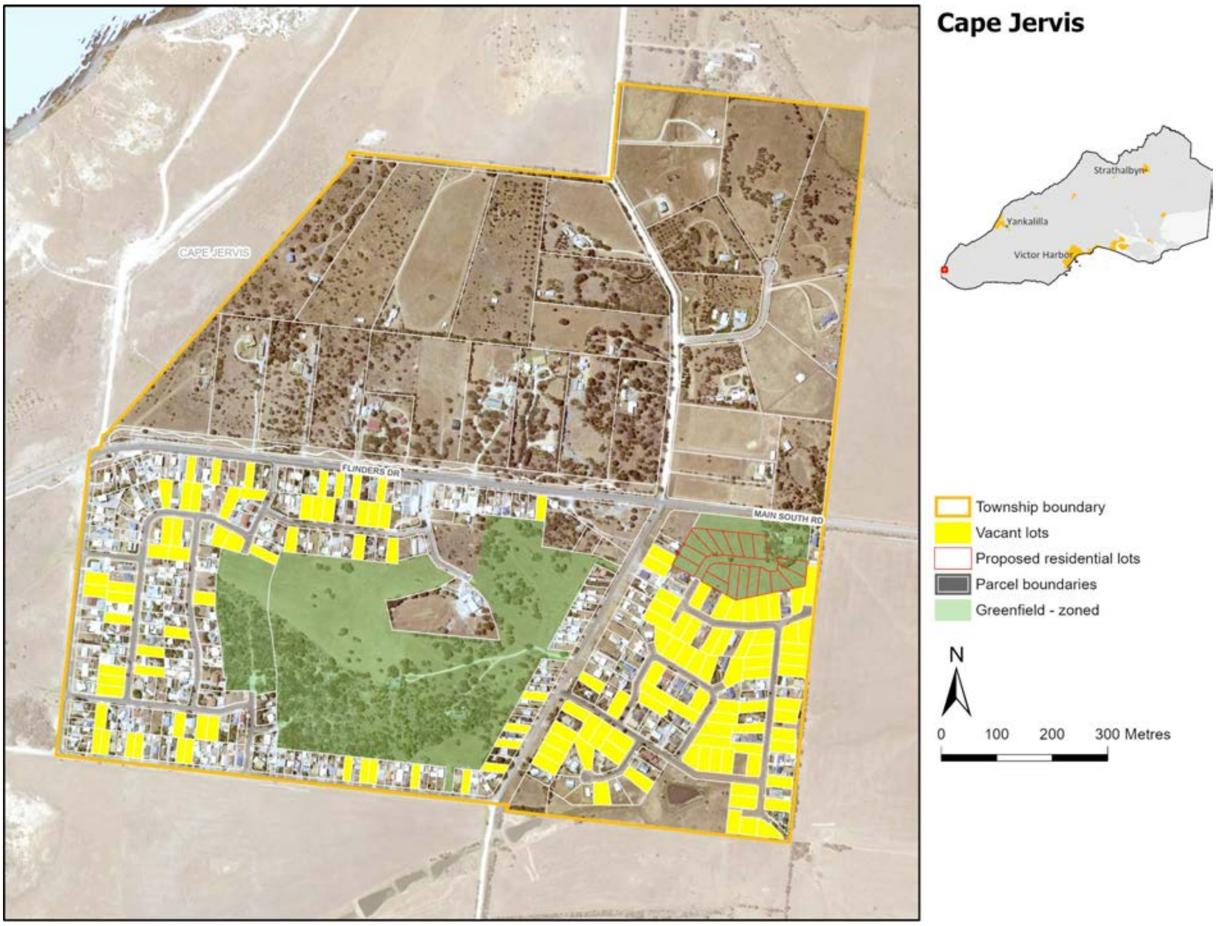
The following section provides analysis on Township development and land supply for the following precincts:

- Cape Jervis
- Clayton Bay
- Goolwa
- Hindmarsh Island
- Middleton
- Milang
- Mount Compass
- Myponga
- Port Elliot
- Strathalbyn
- Victor Harbor
- Yankalilla - Normanville

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, key residential estates, vacant land supply (as of June 2020), proposed lots (June 2020) and land supply sources (Undeveloped Zoned and Future Urban Growth Area);
- A table summarising key measures, including total number of dwelling built to June 2020, and a breakdown of available land supply as of June 2020, by the following categories:
    - Vacant lots
    - Development Ready (proposed lots)
    - Undeveloped Zoned (estimated yield)
    - Future Urban Growth Area (estimated yield)
- Overview of development trends, land supply and infrastructure.

Figure 56: Cape Jervis



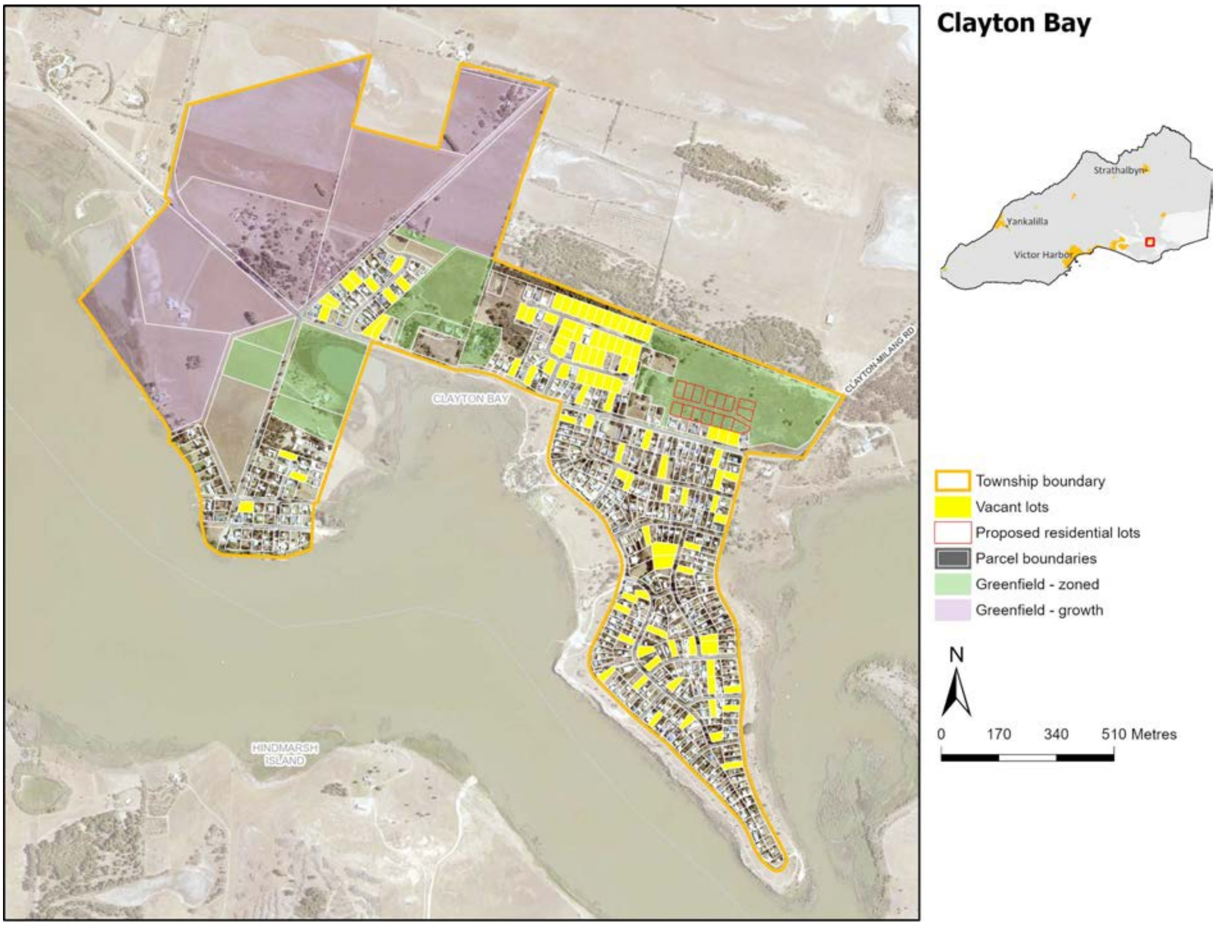
KEY MEASURES

Year Commenced	**Pre-2010**
Dwellings built since 2010	30
Average dwellings built per annum	3
Remaining Potential Capacity	**295**
Vacant lots	135
Development Ready (proposed lots)	17
Undeveloped Zoned	143

ANALYSIS

- Duplication of Main South Road to Sellicks Beach may improve demand for this location.
- Land to the west of the township has been earmarked for tourist development building upon its connection to Kangaroo Island through the Ferry Terminal. Should this land be developed for such purposes it may also drive additional demand for residential development.

Figure 57: Clayton Bay



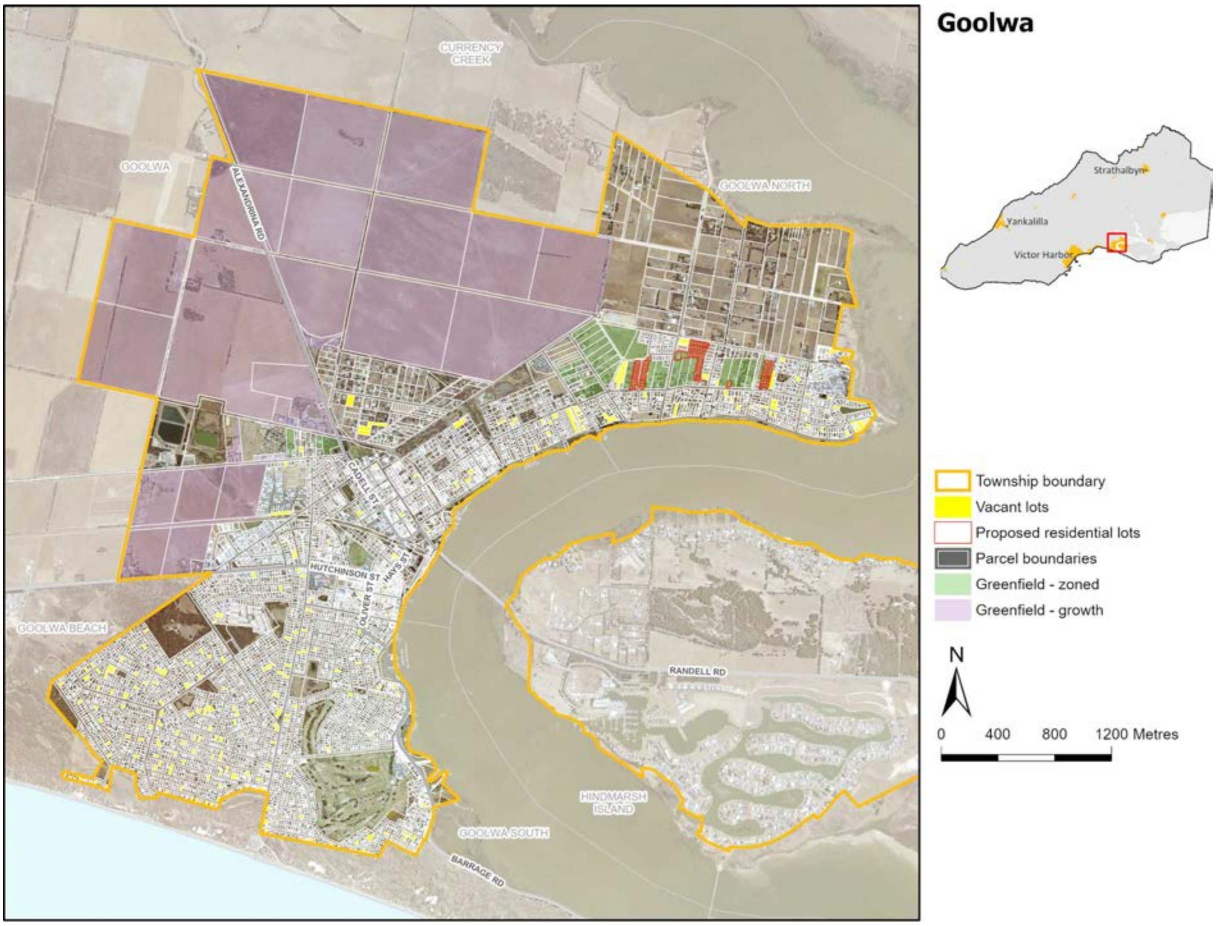
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	79
Average dwellings built per annum	8
Remaining Potential Capacity	**636**
Vacant lots	102
Development Ready (proposed lots)	15
Undeveloped Zoned	139
Future Urban growth area	380

ANALYSIS

- An average of 8 dwellings have been constructed per year since 2010.
- It is estimated an additional 139 allotments could be created on Undeveloped Zoned land.
- There is also an additional 67ha of Future Urban growth area land located to the west, which has an estimated yield of 380 dwellings.

Figure 58: Goolwa



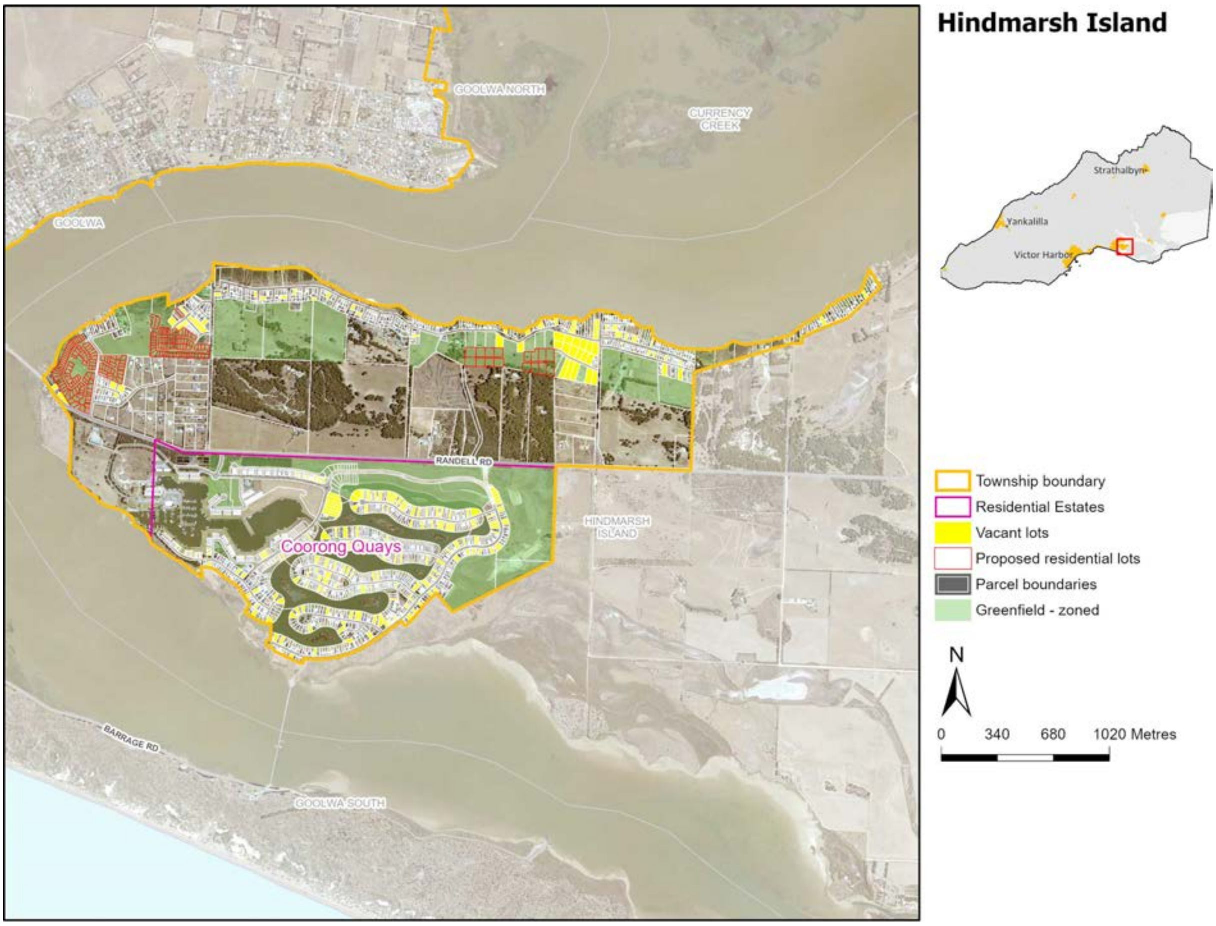
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	485
Average dwellings built per annum	46
Remaining Potential Capacity	**8,432**
Vacant lots	260
Development Ready (proposed lots)	84
Undeveloped Zoned	422
Future Urban growth area	7,666

ANALYSIS

- An average of 46 dwellings have been constructed per year since 2010.
- The Goolwa North DPA is currently under consideration, which seeks to rezone approximately 200ha of Future Urban growth area land to residential.
- Documentation associated with the Goolwa North DPA identifies road and intersection upgrades will be required along Alexandrina Road.
- It also identifies the need to consider construction of a new waste water treatment plant (WWTP).
- Potable water supply is limited, significant augmentation works will be required. At a minimum this will require duplication of existing pipework from Port Elliot's storage tanks.

Figure 59: Hindmarsh Island



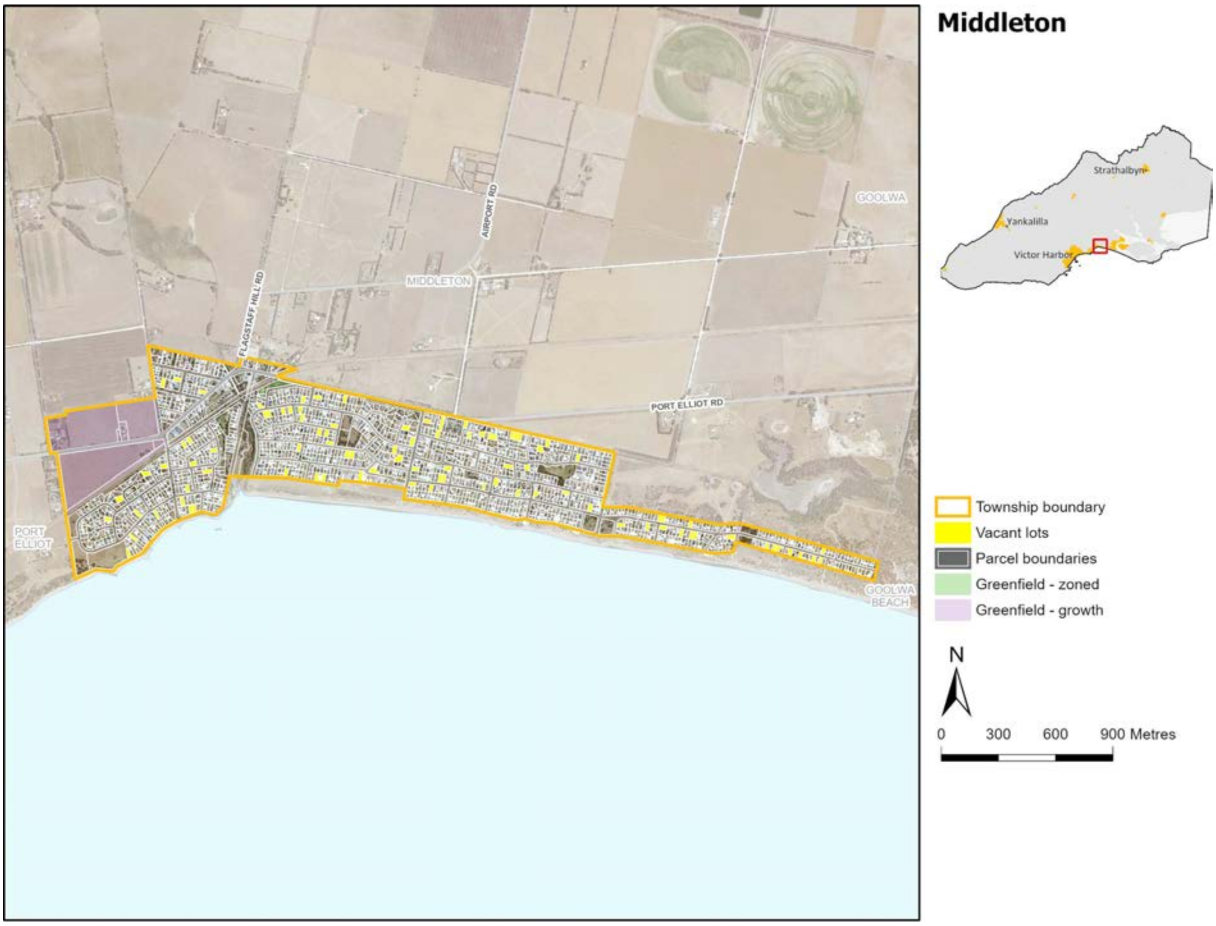
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	374
Average dwellings built per annum	36
Remaining Potential Capacity	**1,408**
Vacant lots	279
Development Ready (proposed lots)	194
Undeveloped Zoned	935

ANALYSIS

- The drought between 2001 and 2009 detrimentally impacted the rate of development at Coorong Quays.
- The majority of the vacant allotments are located around the marina precinct.
- In addition, it is estimated Undeveloped Zoned land could accommodate a further 900 dwellings, supporting growth beyond 2030.

Figure 60: Middleton



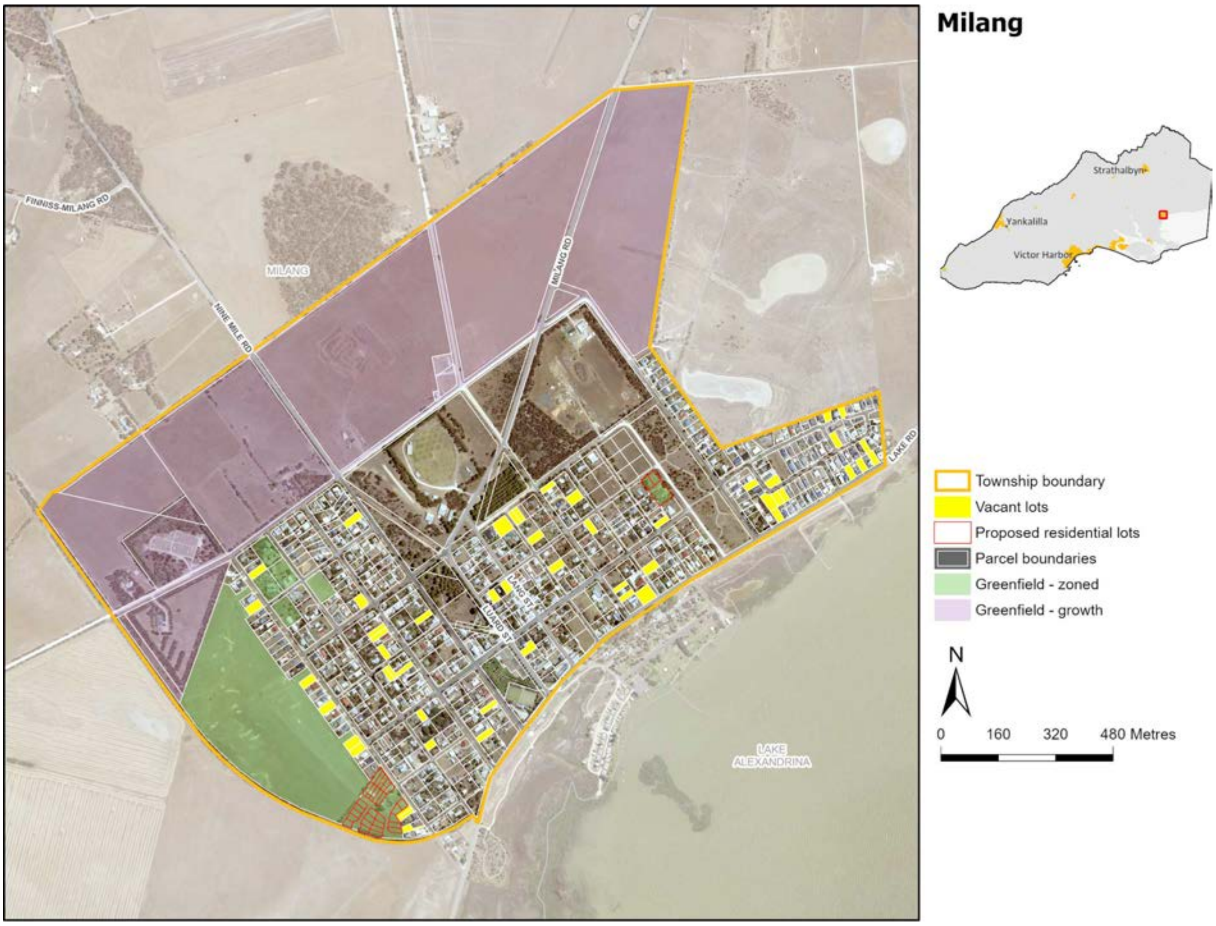
KEY MEASURES

Year Commenced	**Pre-2010**
Dwellings built since 2010	224
Average dwellings built per annum	21
Remaining Potential Capacity	**240**
Vacant lots	92
Development Ready (proposed lots)	0
Undeveloped Zoned	3
Future Urban growth area	145

ANALYSIS

- The majority of vacant allotments are located within the established core of the Township.
- Opportunities for future growth are limited, with the only available Future Urban growth area land located to the north-west of the township. This is estimated to yield an additional 145 allotments.
- Future expansion of the township is currently constrained by the EFPA.

Figure 61: Milang



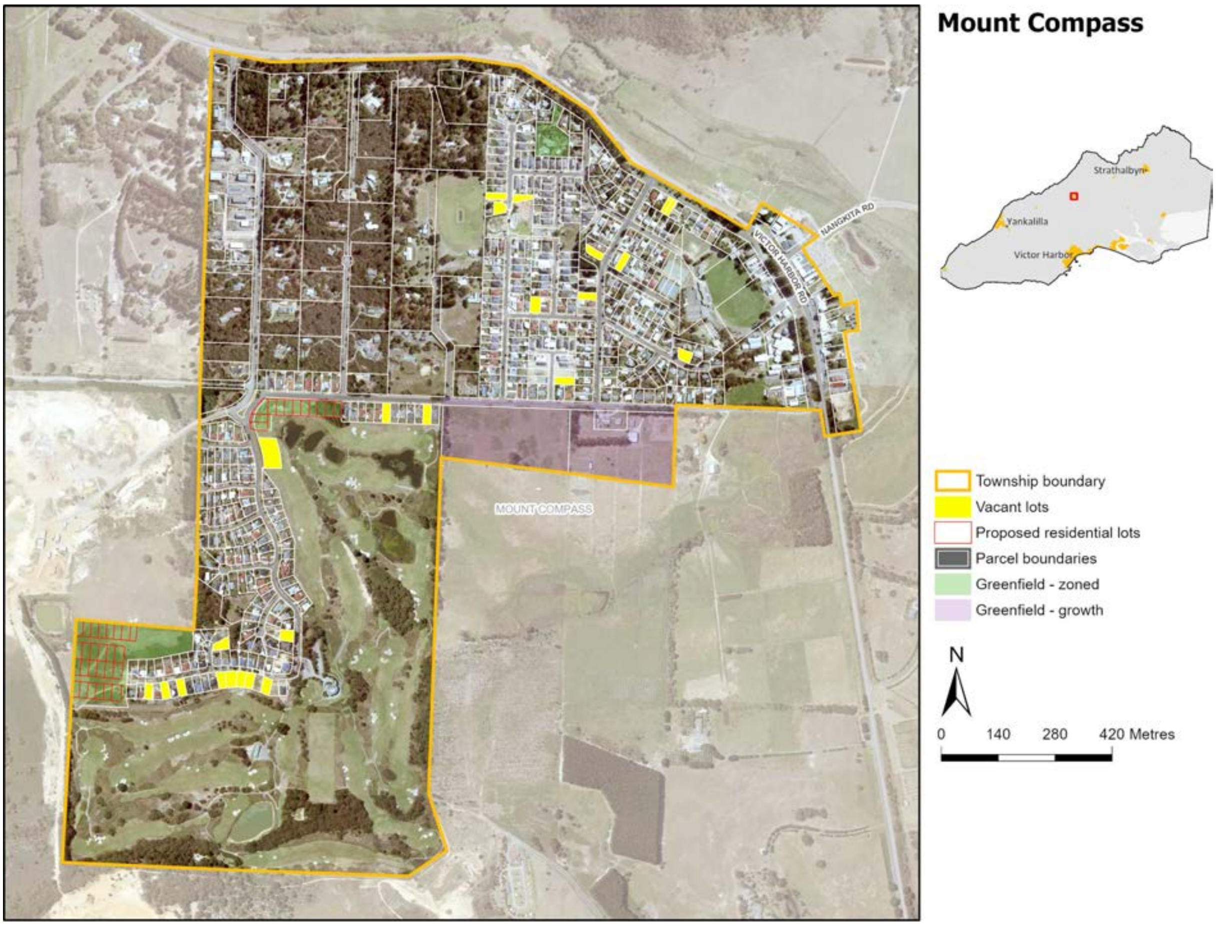
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	89
Average dwellings built per annum	8
Remaining Potential Capacity	**1,403**
Vacant lots	51
Development Ready (proposed lots)	31
Undeveloped Zoned	229
Future Urban growth area	1,092

ANALYSIS

- An estimated 229 additional dwellings could be provided over the remaining Undeveloped Zoned land, which would accommodate growth beyond 2030.
- There is also an additional 88ha of Future Urban growth area land to the north, which could yield an estimated 1,000 dwellings.

Figure 62: Mount Compass



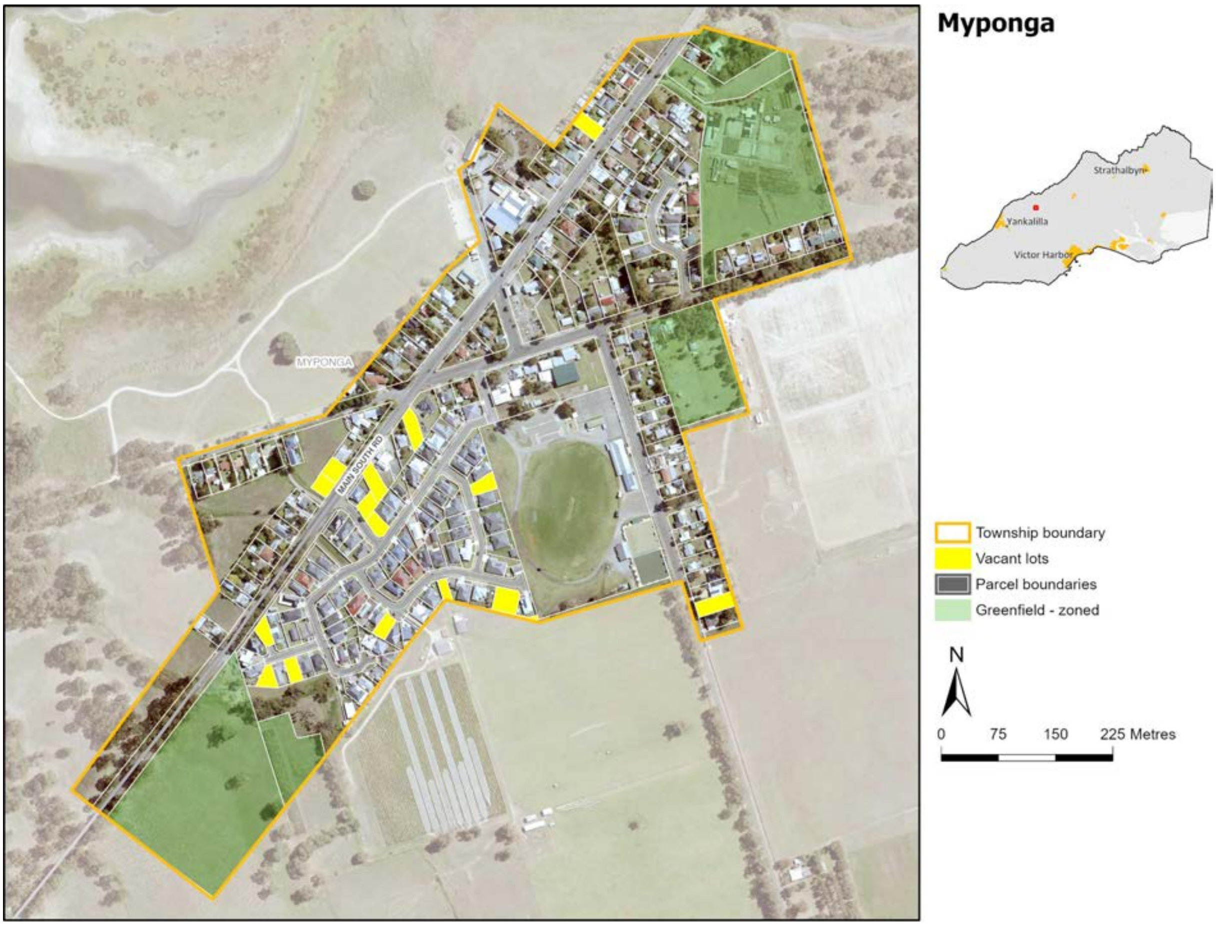
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	92
Average dwellings built per annum	9
Remaining Potential Capacity	**187**
Vacant lots	24
Development Ready (proposed lots)	38
Undeveloped Zoned	41
Future Urban growth area	84

ANALYSIS

- The majority of vacant and Development Ready allotments surround the Mount Compass Golf Course.
- Future Urban growth area land is located south of Arthur Road, with an estimated yield of 80 dwellings.
- Future expansion of the township is currently constrained by the EFPA.

Figure 63: Myponga



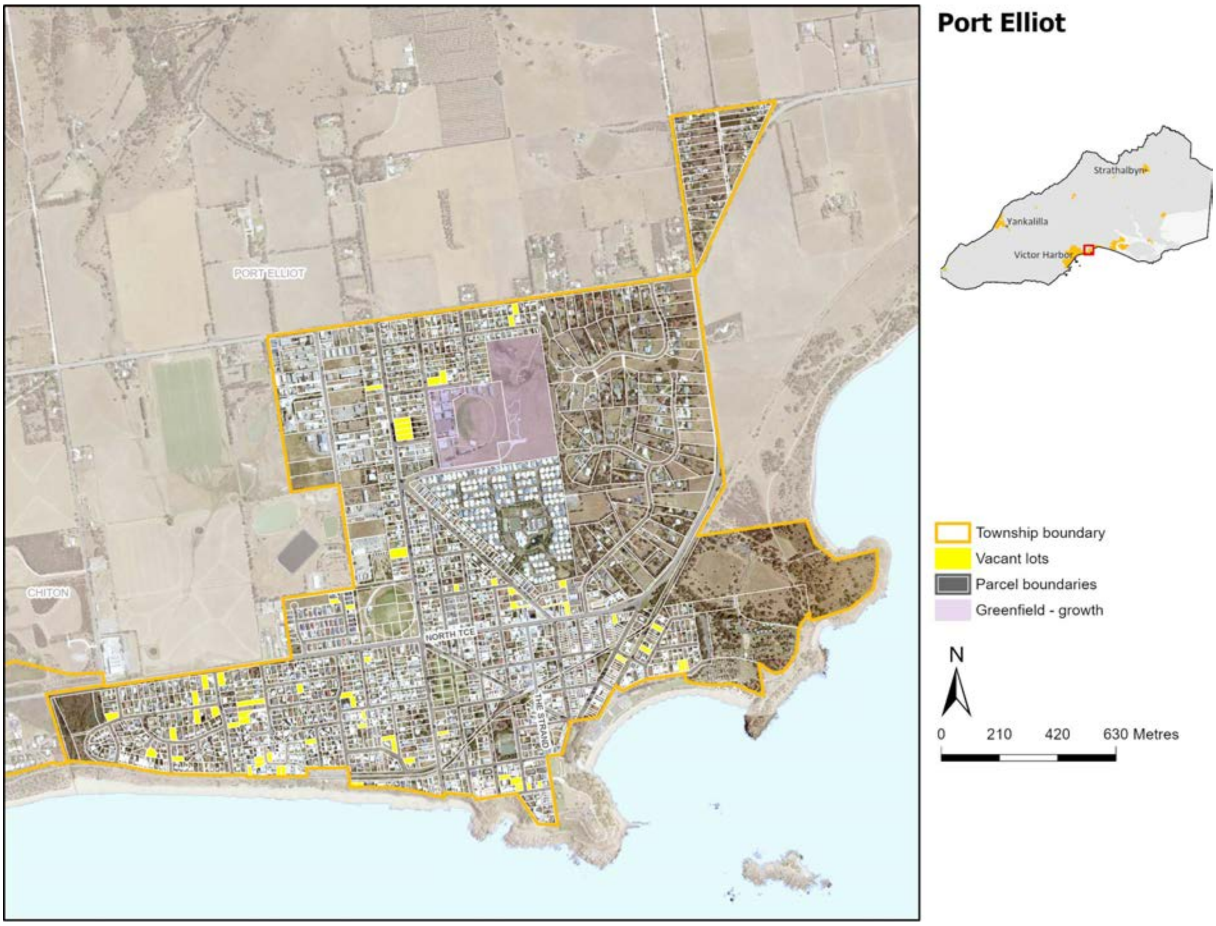
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	90
Average dwellings built per annum	9
Remaining Potential Capacity	**82**
Vacant lots	14
Development Ready (proposed lots)	0
Undeveloped Zoned	68

ANALYSIS

- Undeveloped Zoned land to the north and south are estimated to yield an additional 60-70 dwellings.
- Once this land is consumed there are no additional sources of Greenfield land for Township expansion, other than infill.
- Future expansion of the township is currently constrained by the EFPA.

Figure 64: Port Elliot



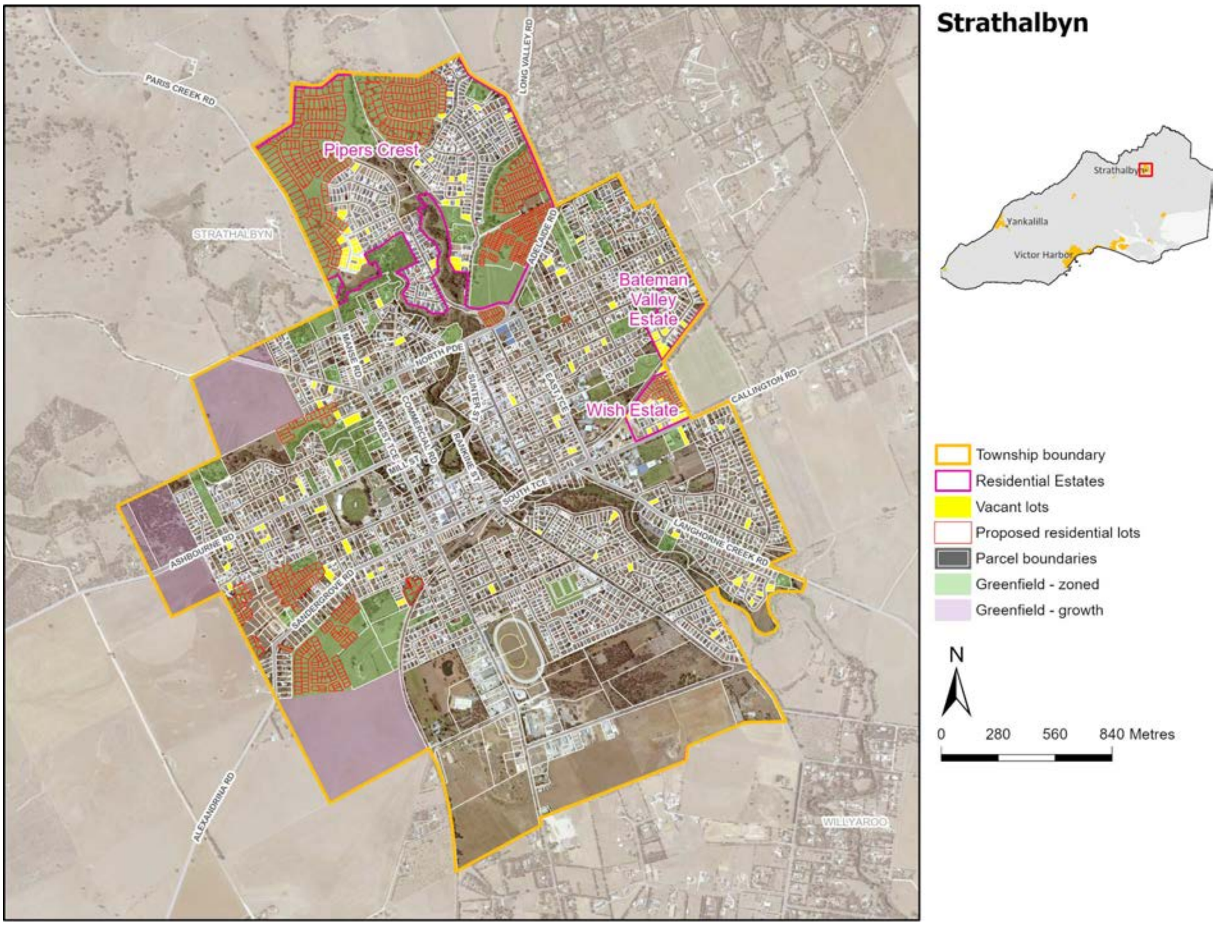
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	184
Average dwellings built per annum	18
Remaining Potential Capacity	**171**
Vacant lots	63
Development Ready (proposed lots)	0
Undeveloped Zoned	0
Future Urban growth area	108

ANALYSIS

- There are no identified active residential estates.
- The majority of residential development within the township is infill.
- Future Urban growth area land to the north is estimated to yield an estimated 108 dwellings.
- Duplication of the Victor Harbor Road to McLaren Vale may also drive some additional growth.
- Future expansion of the township is currently constrained by the EFPA.

Figure 65: Strathalbyn



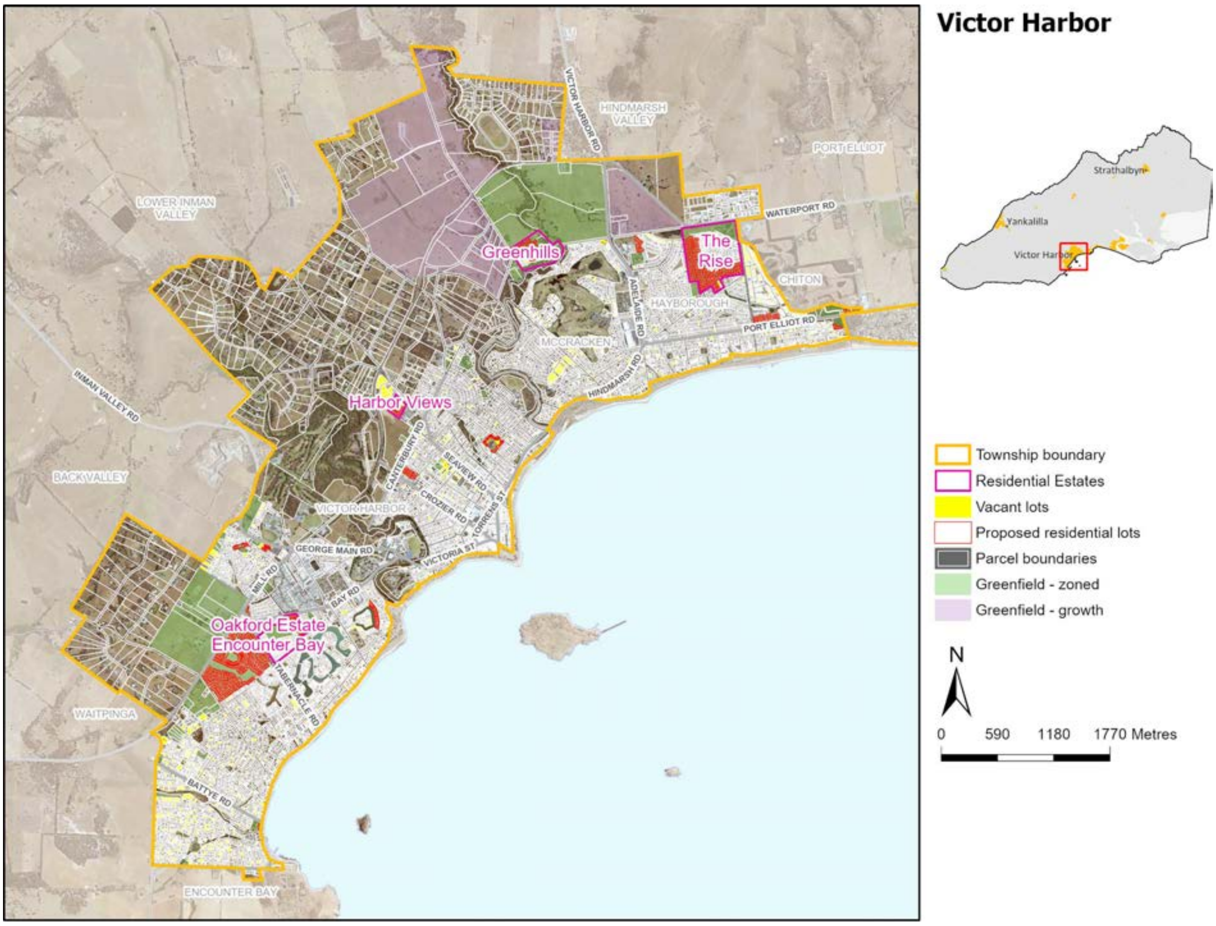
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	599
Average dwellings built per annum	57
Remaining Potential Capacity	**1,769**
Vacant lots	127
Development Ready (proposed lots)	680
Undeveloped Zoned	451
Future Urban growth area	511

ANALYSIS

- An average of 57 dwellings per year have been constructed since 2010, only Victor Harbor has a higher rate of development in the Region.
- Undeveloped Zoned land is estimated to yield a further 451 dwellings.
- The *Strathalbyn Deferred Urban DPA* which has recently been approved.
- A newly constructed WWTP has capacity for an additional 400 dwellings before further augmentation works are required.
- The substation was upgraded in recent years ensuring sufficient provision of power to both sites subject of the current DPA.

Figure 66: Victor Harbor



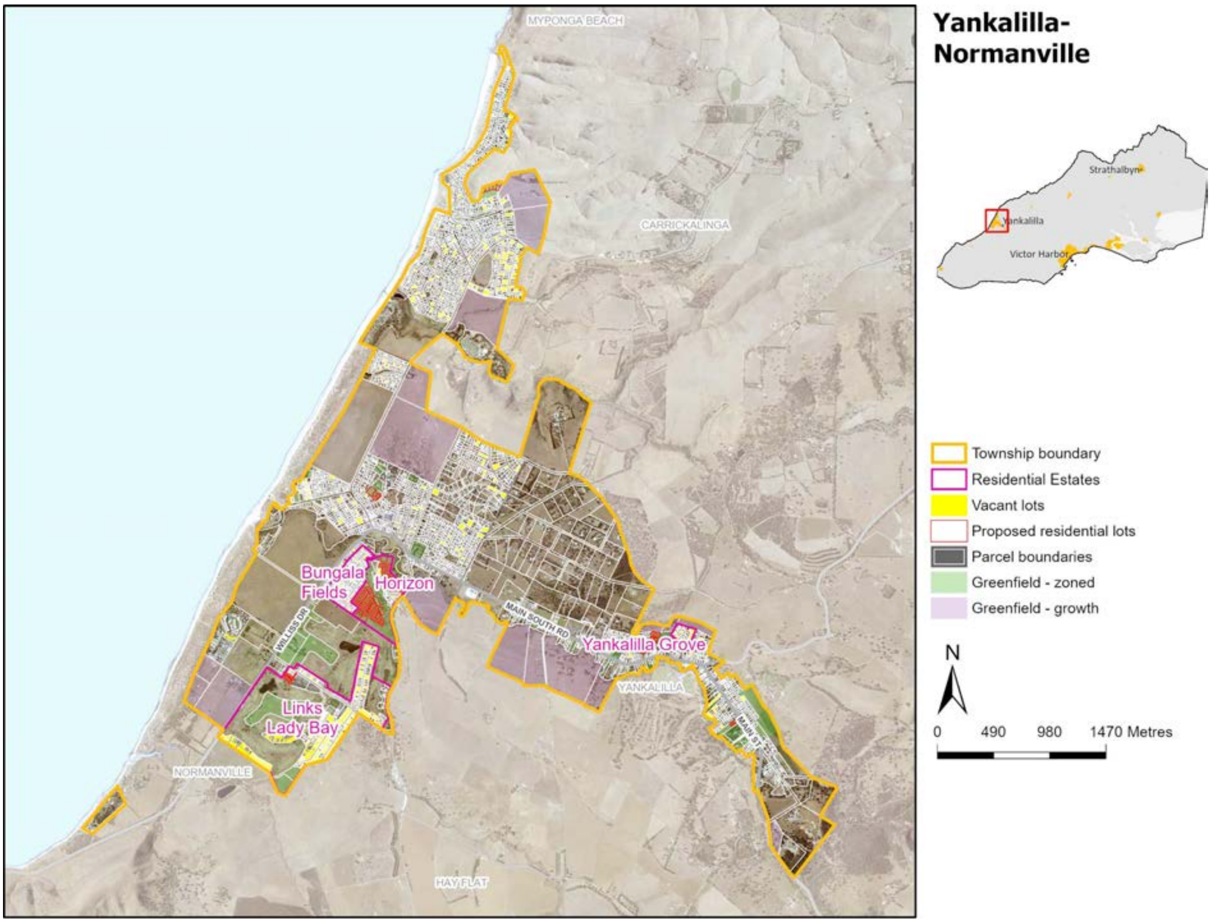
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	1,464
Average dwellings built per annum	139
Remaining Potential Capacity	**6,277**
Vacant lots	783
Development Ready (proposed lots)	842
Undeveloped Zoned	2,049
Future Urban growth area	2,603

ANALYSIS

- Residential development is evenly split between Greenfield and Infill.
- It is estimated Undeveloped Zoned land could also accommodate an additional 2,000 allotments.
- In addition there is 256ha of Future Urban growth area land to the north, which is estimated to yield 2,600 allotments.
- Lifestyle and work life demands may drive an increase in dwelling growth.
- Duplication of the Victor Harbor Road to McLaren Vale may also drive some additional growth.

Figure 67: Yankalilla - Normanville



KEY MEASURES

Year Commenced	Pre-2010
Dwellings built since 2010	438
Average dwellings built per annum	42
Remaining Potential Capacity	**2,195**
Vacant Lots	451
Proposed Lots	148
Undeveloped Zoned Land	355
Future Urban Growth Area	1,241

ANALYSIS

- The majority of vacant allotments are within the Links Lady Bay development.
- It is estimated Undeveloped Zoned land could yield an additional 355 allotments.
- In addition there are 6 pockets of identified Future Urban growth area land, totalling 161ha. Based on current regional yields, this land has potential to accommodate a further 1,200 allotments.
- Duplication of Main South Road to Sellicks Beach may drive additional growth in this area.

5.6 Summary

The urban centres of Victor Harbor and Goolwa are the areas where the most dwelling growth has occurred in the last 10 years. These are also the locations the have the greatest supply of Future Urban lands. Township growth accounted for 90% of the total dwellings built in this area. Residential land supply in Fleurieu townships can be summarised as follows[3]:

- 2,100 Development Ready allotments.
- Capacity to accommodate an additional 5,400 allotments on Undeveloped Zoned land.
- Capacity to accommodate an additional 13,800 allotments on identified Future Urban Growth areas.
- There are a range of key infrastructure upgrades in roads and education that will continue to support future development.
- In addition to the above, as of June 2020 there were 2,400 vacant allotments. These have not been included in the analysis of available Township land supply.

Growth Scenarios

Under a medium growth scenario, Township development would need to produce 370 dwellings a year to meet demand. Under a high growth scenario, Township development would need to produce 470 dwellings a year.

[3] The Strathalbyn Deferred Urban Development Plan Amendment was approved early in 2021 which added an additional 35 ha of zoned land for residential development

6. TOWNSHIP LAND SUPPLY - MURRAY BRIDGE

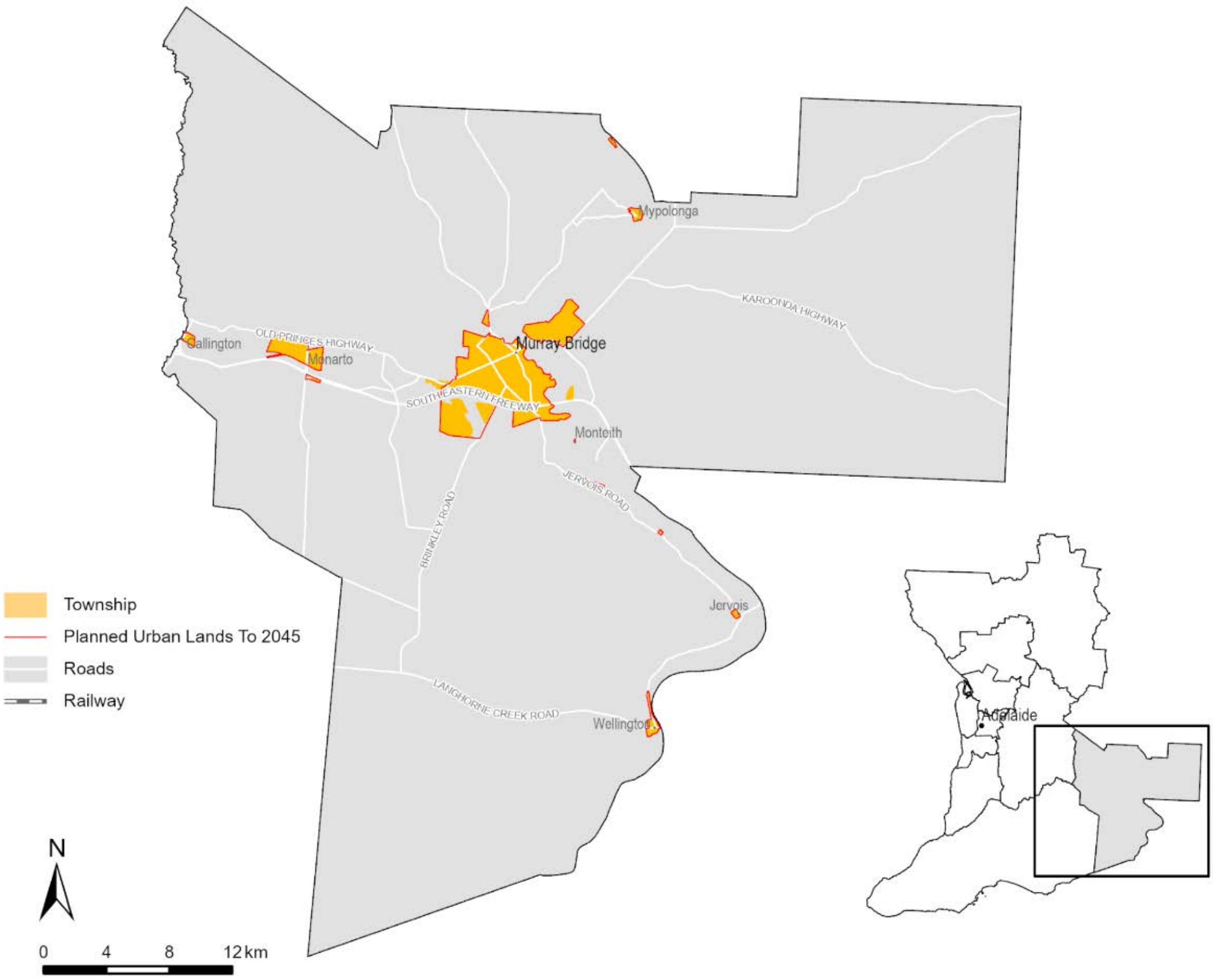
6.1 Overview

The Murray Bridge region contains a diverse range of premium landscapes, tourist attractions and valuable primary production land which are well protected from urban encroachment and development as result of the Environment and Food Production Area (EFPA) boundary. Consequently opportunities for further township expansion are limited, as shown in Figure 68.

Key facts about the Murray Bridge Region include that:

- The region contains the Local Government Area (LGA) of Murray Bridge Council.
- The region accommodates some of the most environmentally sensitive and important land within the Greater Adelaide Planning Region, such as the River Murray, Monarto Conservation Park and a portion of the Coorong (Lake Alexandrina).
- Aside from identified townships, the region is covered by the EFPA, restricting sub-division for residential purposes.

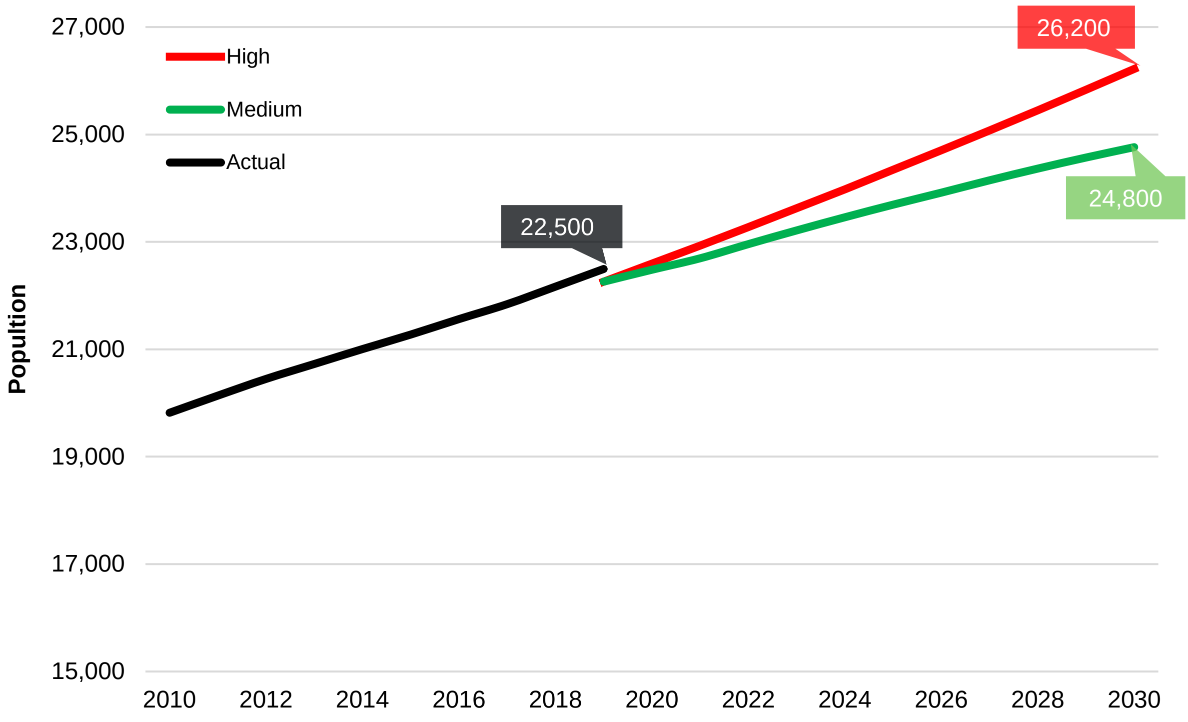
Figure 68: Murray Bridge region geography



Population

- Between 2010 and 2019 the region grew by 2,700 persons, at an average annual rate of 1.35%.
- In 2020 the projected population for the region is 22,500.
- Figure 69 shows actual growth to 2019, and projected growth from 2020 to 2030 for both a medium and high growth scenarios.

Figure 69: Population growth 2010 - 2030



Housing Demand

- Between 2010 and June 2020 a total of 1,300 dwellings were constructed.
- Under a medium growth scenario there is an estimated requirement for 1,100 additional dwellings between 2020 and 2030, with 900 to be built within Townships.
- Under a high growth scenario there is an estimated requirement for 1,600 additional dwellings between 2020 and 2030, with 1,300 to be built within Townships.

Land Supply

At June 2020:

- there were 500 Development Ready allotments available on Township land; and
- an estimated potential for 5,800 allotments on Undeveloped Zoned land.

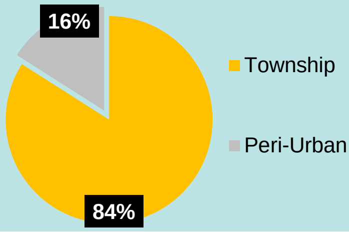
6.2 Recent development trends, 2010 – 2019

DWELLINGS BUILT

1,300 (gross)

130p.a

DEVELOPMENT TYPE



DWELLING TYPE

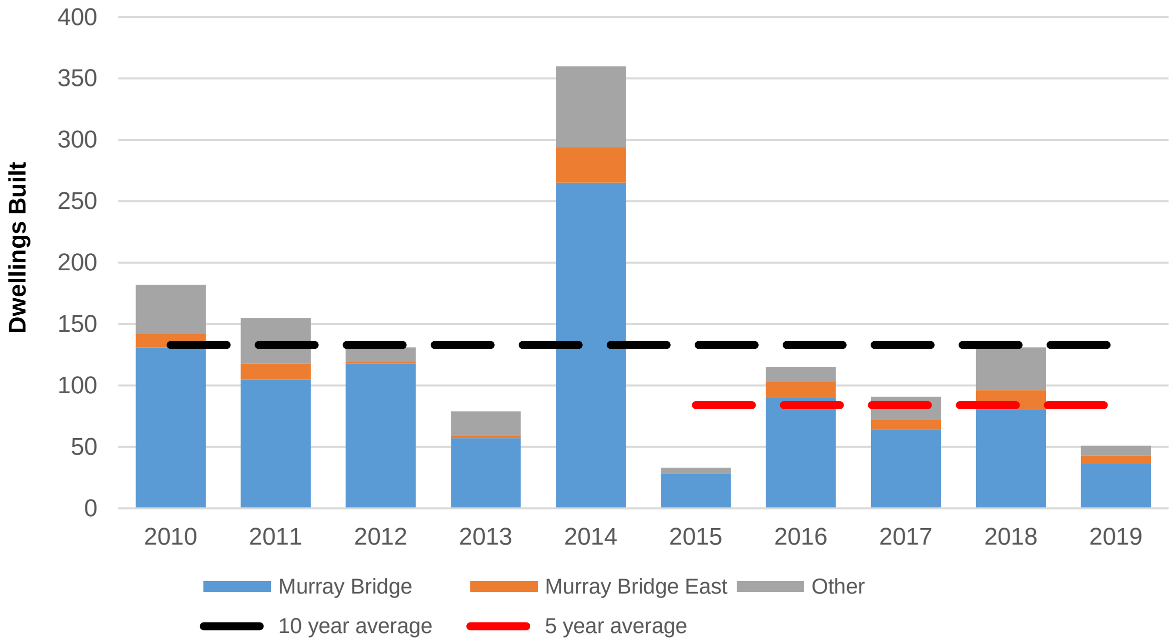
86% Detached

8% Townhouse

Over this period the following development trends have emerged within the region:

- A total of 1,300 dwellings were completed.
- Detached dwellings accounted for 86% of total dwellings constructed over this period, townhouses accounted for a further 8%.
- Dwelling completions peaked in 2014 with 360 in total, as illustrated in Figure 70. This resulted from a surge in development within the township of Murray Bridge.
- Township development accounted for 84% of dwellings built over this period.
- The township of Murray Bridge accounted for 80% of this development.

Figure 70: Gross number of dwellings built by year, 2010 - 2019



6.3 Future demand, 2020 – 2030

POPULATION CHANGE

2,300 (medium)
230p.a

3,600 (high)
360p.a

DWELLING DEMAND

1,100 (medium)
1,600 (high)

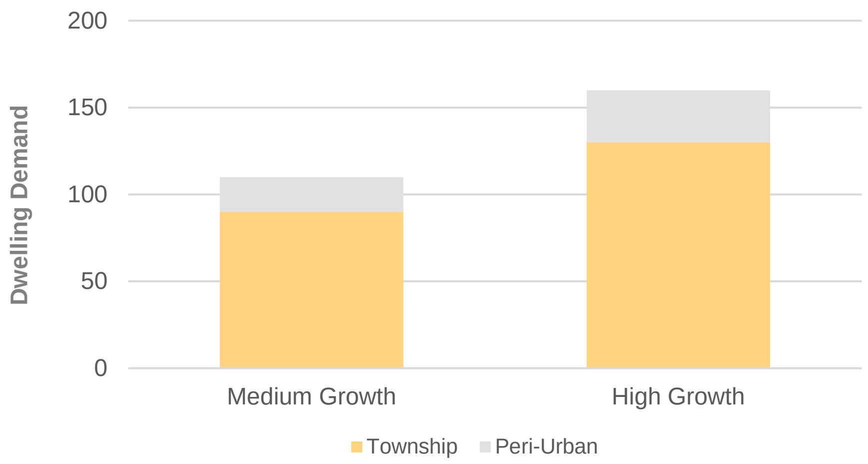
TOWNSHIP DWELLING DEMAND

900 (medium)
1,300 (high)

The report provides medium and high growth scenarios for both projected population and dwelling demand. This has been prepared to assist strategic and infrastructure planning at a local and state government level because decision and policy makers must be cognisant of the impacts that both scenarios are likely to have on future demand for land, services and critical infrastructure.

Projected population growth and average dwelling size were used to estimate dwelling demand for a medium and high growth scenario, as shown in Figure 71.

Figure 71: Projected annual dwelling demand to 2030



Analysis of these projections indicates that:

- The medium growth scenario estimates an additional 90 dwellings per annum would be required from Township development.
- The high growth scenario estimates an additional 130 dwellings per annum would be required from Township development.

6.4 Township land supply to 2030

DEVELOPMENT READY	UNDEVELOPED ZONED	FUTURE URBAN GROWTH
500 lots	**5,800** Estimated lots	**4,400** Estimated lots

Township development accommodated 84% of all dwellings built between 2010 and 2019. It is assumed this trend will continue with residential estates

A stocktake of Township land supply within this region is illustrated in Figure 72 and Table 8, and shows the following:

- 5% of estimated township land supply is Development Ready, the majority of which is spread across the three active residential estates located within the township of Murray Bridge.
- Undeveloped zoned land accommodates an estimated 50% of total township land supply.
- Just over 40% of the estimated land supply is located within identified Future Urban growth areas.

Figure 72: Township land supply by development front, June 2020

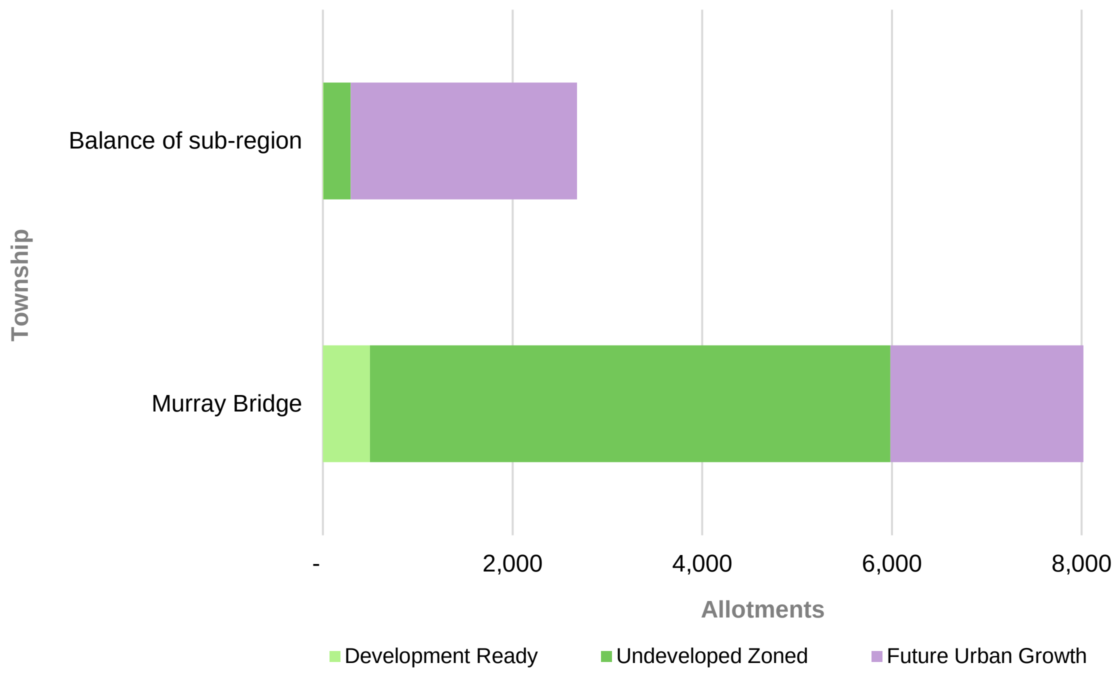


Table 8: Township land supply by development front – Murray Bridge, June 2020

STATUS	DEVELOPMENT READY		UNDEVELOPED ZONED		FUTURE URBAN GROWTH AREA	
Development Front	**Area (ha)**	**Lots**	**Area (ha)**	**Estimated Lots**	**Area (ha)**	**Estimated Lots**
Murray Bridge	49	496	543	5,487	202	2,042
Balance of region	1	5	56	289	239	2,387
TOTAL	**50**	**501**	**599**	**5,776**	**441**	**4,429**

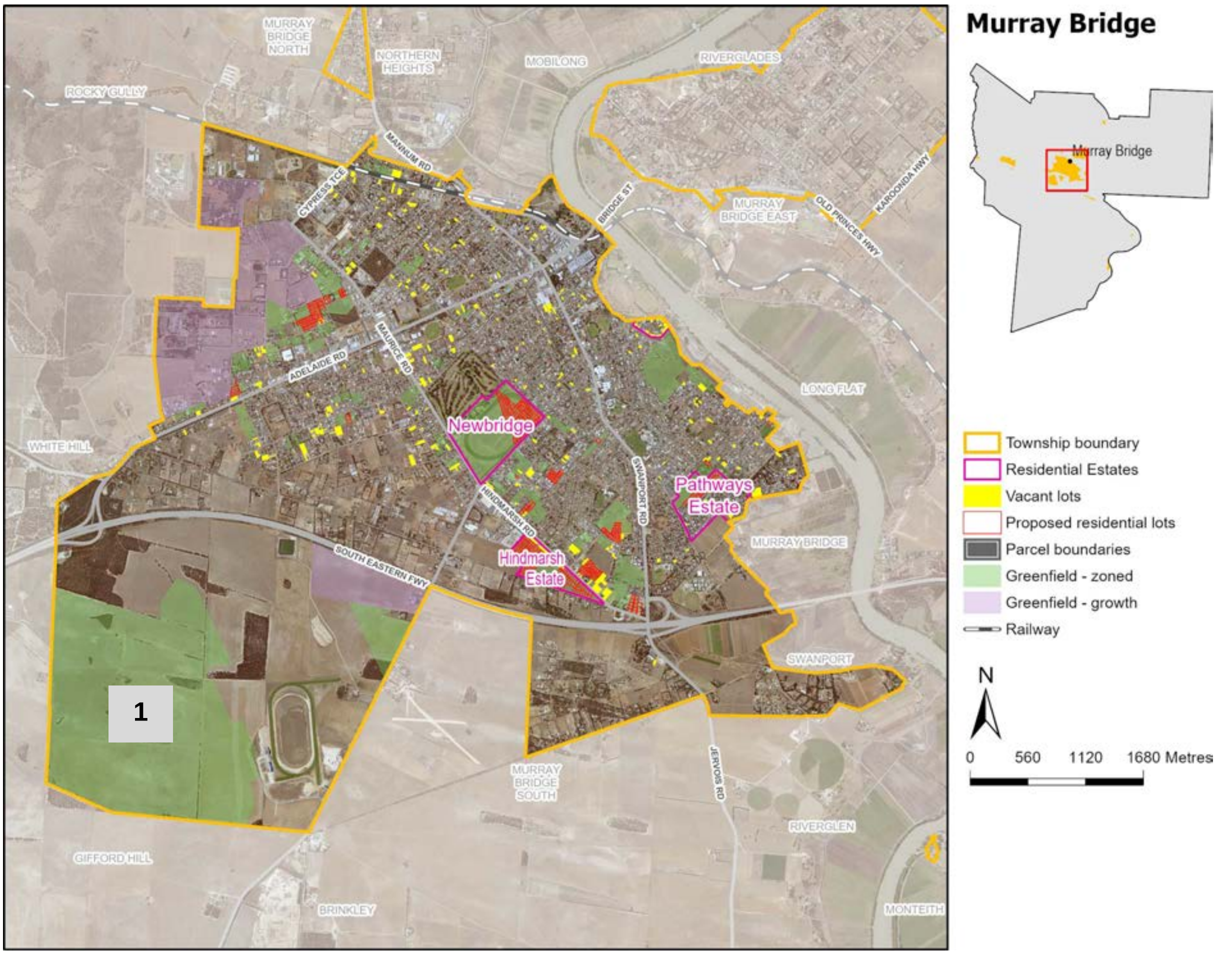
6.5 Key Township development fronts

The following section provides analysis on Township development and land supply for Murray Bridge:

Analysis of the identified precinct includes:

- A map, illustrating the full extent of the precinct, key residential estates, vacant land supply (as of June 2020), proposed lots (June 2020) and land supply sources (Undeveloped Zoned and Future Urban Growth Area);
- A table summarising key measures, including total number of dwelling built to June 2020, and a breakdown of available land supply as of June 2020, by the following categories:
    - Vacant lots
    - Development Ready (proposed lots)
    - Undeveloped Zoned (estimated yield)
    - Future Urban Growth Area (estimated yield)
- Overview of development trends, land supply and infrastructure.

Figure 73: Murray Bridge



KEY MEASURES

Year Commenced	Pre-2010
Dwellings built	1,103
Average dwellings built per annum	105
Remaining Potential Capacity	**8,348**
Vacant lots	323
Development Ready (proposed lots)	496
Undeveloped Zoned	5,487
Future Urban growth area	2,042

ANALYSIS

- Approximately 50% of all dwellings built resulted from infill development.
- A further 40% of development was attributed to development on the fringes of the established township 'core'.
- The township comprises 3 active residential development fronts.
- Newbridge is the largest active residential estate with an estimated capacity of 350 dwellings upon completion.
- Hindmarsh estate has an estimated potential for 120 dwellings upon completion.
- Gifford Hill, to be located on land marked '1' on the map above, is estimated to accommodate a total 3,000 dwellings upon completion.
- Industry investment in the region, including the Thomas Foods processing and packaging facility, will continue to support population growth.

6.6 Summary

Township land supply in the Murray Bridge Region can be summarised as follows:

- 500 Development Ready allotments.
- Capacity to accommodate an additional 5,800 allotments on Undeveloped Zoned land.
- Capacity to accommodate an additional 4,400 allotments on identified Future Urban growth areas.
- Range of key infrastructure upgrades and industry investments will continue to support future development and population growth.
- In addition to the above, as of June 2020 there were 2,400 vacant allotments. These have not been included in the analysis of available Township land supply.

Growth Scenarios

Under a medium growth scenario, it is estimated Townships would need to accommodate an additional 90 lots a year. Under a high growth scenario, it is estimated that Townships would need to accommodate an additional 130 dwellings a year.

7. TOWNSHIP LAND SUPPLY – NORTHERN PLAINS & BAROSSA

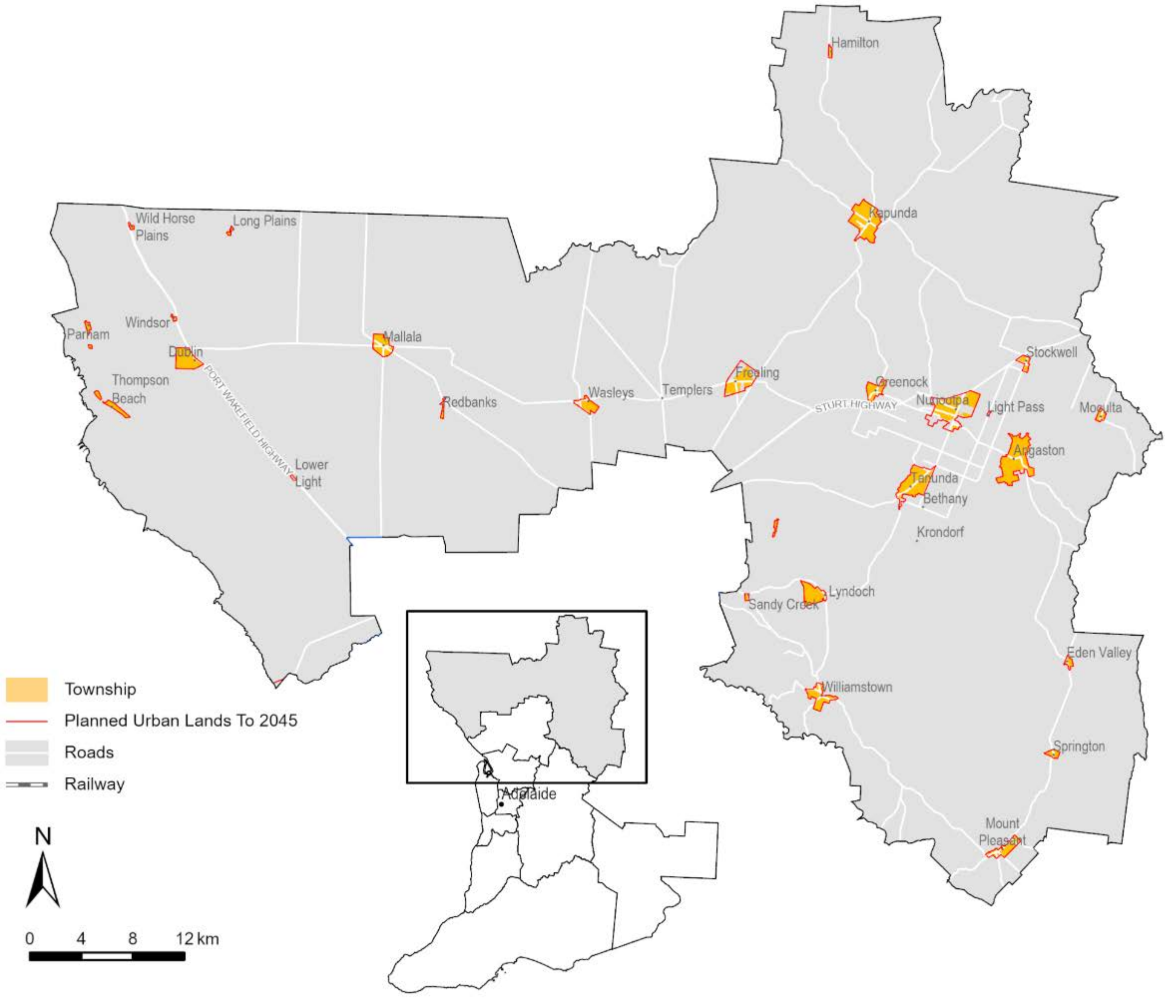
7.1 Overview

The region includes parts of the Adelaide Plains, Light Regional and Barossa Regional Council areas. It contains a diverse range of premium landscapes, high value primary production and viticulture land, all of which play a critical role in driving demand for residential and tourism related activities and accommodation. Balancing the protection of these unique, high amenity and productive lands with projected population growth and subsequent demand for land and housing is critical.

Key facts about the Northern Plains and Barossa Region include that:

- It contains the Local Government Areas (LGA) of Adelaide Plains (in part), Light Regional (in part) and Barossa Council (in part).
- Has the least estimated allotment supply for Township land of all the regions.
- The region is covered by both the Environment and Food Productions Area (EFPA) and the Barossa Character Preservation District (CPD).

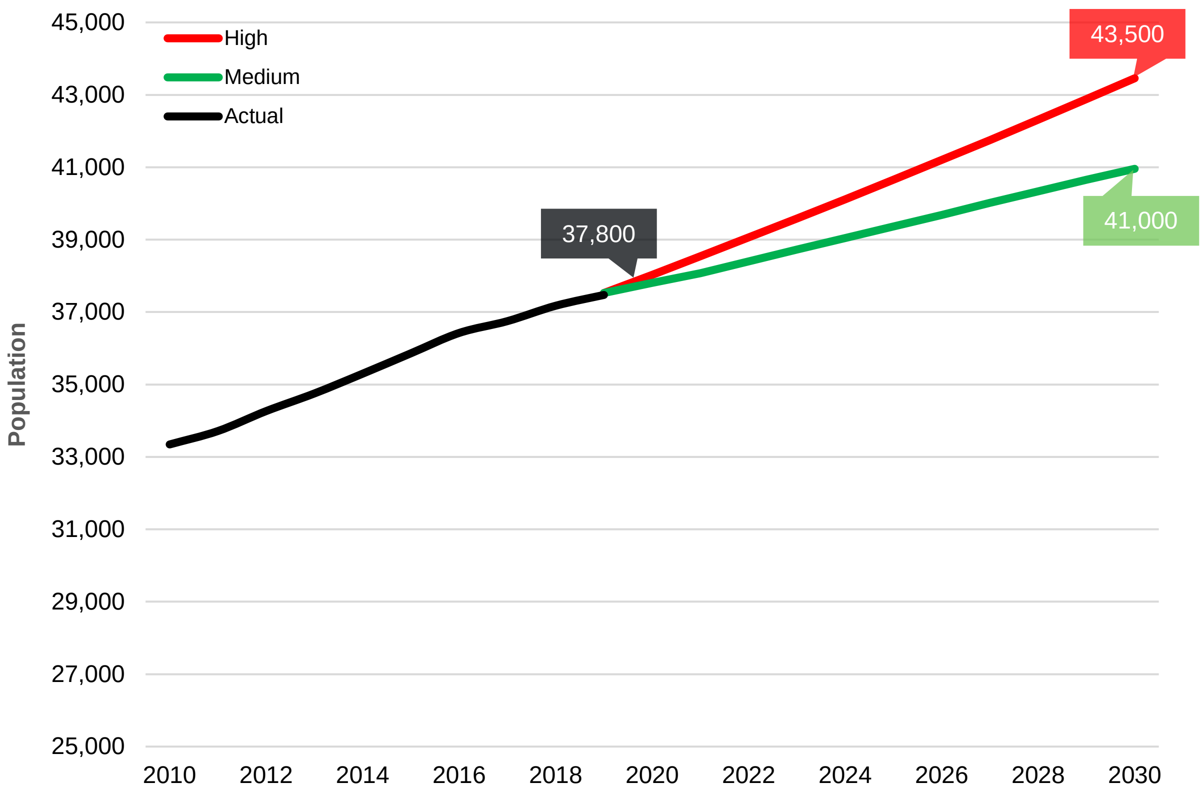
Figure 74: Northern Plains and Barossa region geography



Population

- Between 2010 and 2019 the region has grown by 4,100 persons, at an average annual rate of 1.2%.
- In 2020 the projected population for the region is 37,800.
- Figure 75 shows actual growth to 2019, and projected growth from 2020 to 2030 for both a medium and a high growth scenario.

Figure 75: Population growth 2010 - 2030



Housing Demand

- Between 2010 and June 2020 a total of 2,300 dwellings were constructed.
- Under a medium growth scenario there is an estimated requirement for 1,300 additional dwellings between 2020 and 2030, with 1,100 to be built within townships.
- Under a high growth scenario there is an estimated requirement for 2,200 additional dwellings between 2020 and 2030, with 1,900 to be built within townships.

Land Supply

At June 2020:

- there were 1,200 Development Ready allotments available within identified Townships; and
- a further potential for an estimated 2,900 allotments on Undeveloped Zoned land.

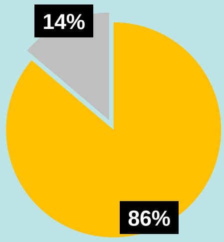
7.2 Recent development trends, 2010 - 2019

DWELLINGS BUILT

2,300 (gross)

230 p.a

DEVELOPMENT TYPE



DWELLING TYPE

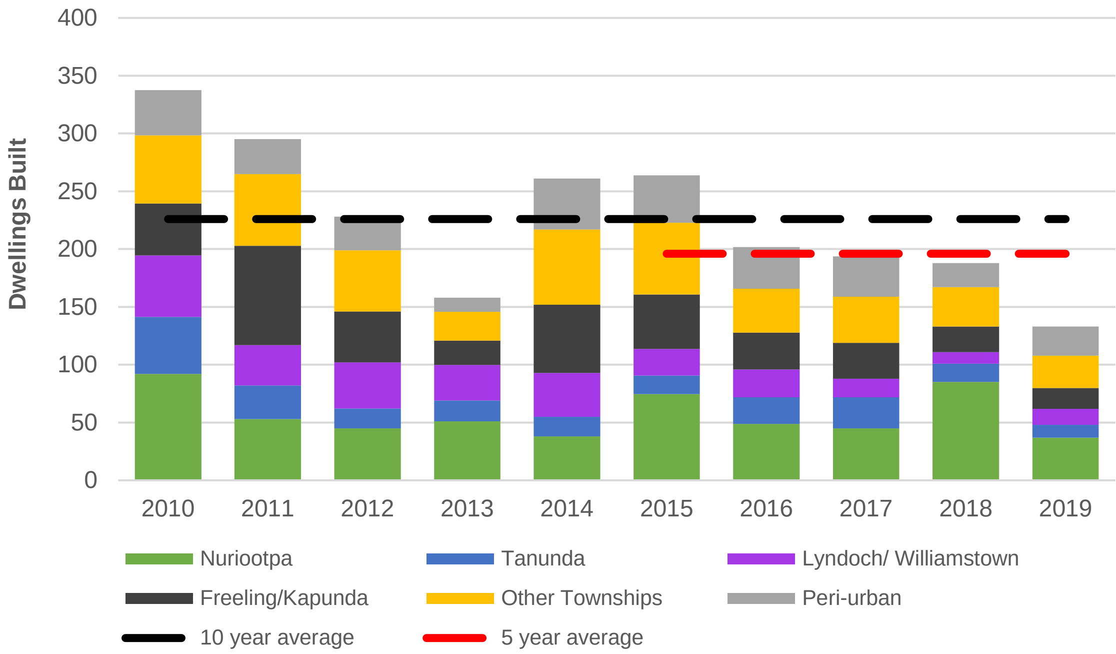
91% Detached

5% Retirement Village Units

Over the period the following development trends have emerged within the region:

- A total of 2,300 dwellings were completed between 2010 and 2019.
- Detached dwellings accounted for 91% of total dwellings built over this period with retirement village units comprising an additional 5%.
- Dwelling completions peaked in 2010 which coincided with peaks in construction activity in the townships of Nuriootpa and Tanunda, as illustrated in Figure 76.
- Township development accounted for 86% of total dwellings built between 2010 and 2019.
- Residential development within the township of Nuriootpa accounted for 25% of total dwellings built within the region over this period.
- Over the last 5 years the levels of development have dropped off with reduced activity in all townships aside from Nuriootpa.

Figure 76: Gross number of dwellings built by year, 2010 - 2019



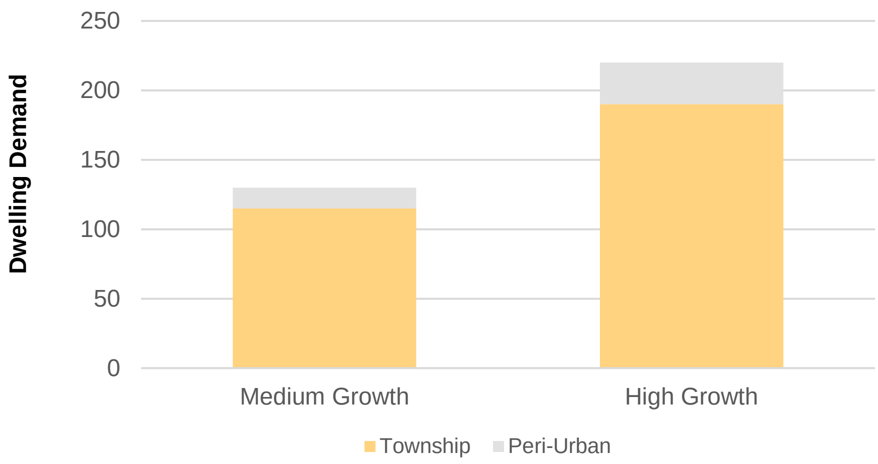
7.3 Future demand, 2020 – 2030

POPULATION CHANGE	TOTAL DWELLING DEMAND	TOWNSHIP DWELLING DEMAND
3,200 (medium) **320**p.a **5,400** (high) **540**p.a	**1,300** (medium) **2,200** (high)	**1,100** (medium) **1,900** (high)

The report provides medium and high growth scenarios for both projected population and dwelling demand. This has been prepared to assist strategic and infrastructure planning at a local and state government level because decision and policy makers must be cognisant of the impacts that both scenarios are likely to have on future demand for land, services and critical infrastructure.

Projected population growth and average dwelling size were used to estimate dwelling demand for a medium and high growth scenario, as shown in Figure 77.

Figure 77: Projected annual dwelling demand to 2030



Analysis of these projections indicates that:

- For the medium growth scenario it is estimated an additional 110 dwellings per annum would be required from Township development to accommodate projected growth.
- For the high growth scenario it is estimated an additional 190 dwellings per annum would be required from Township development to accommodate projected growth.

7.4 Township land supply to 2030

DEVELOPMENT READY	UNDEVELOPED ZONED	FUTURE URBAN GROWTH
1,200 lots	**3,500** Estimated lots	**400** Estimated lots

Township development combined to account for a total 86% of all dwellings in the region built between 2010 and June 2020.

A stocktake of Township land supply within this region is illustrated in Figure 78 and Table 9, and shows the following:

- 24% of Township land supply is Development Ready.
- The township of Kapunda accounts for the largest number of development ready allotments, with just over 300.
- An estimated 69% of estimated allotment potential is located on Undeveloped Zoned land.
- Undeveloped Zoned land at Kapunda has an estimated potential for an additional 690 allotments.
- An estimated 8% of total land supply is located within an identified Future Urban growth area.

Figure 78: Township land supply by development front, June 2020

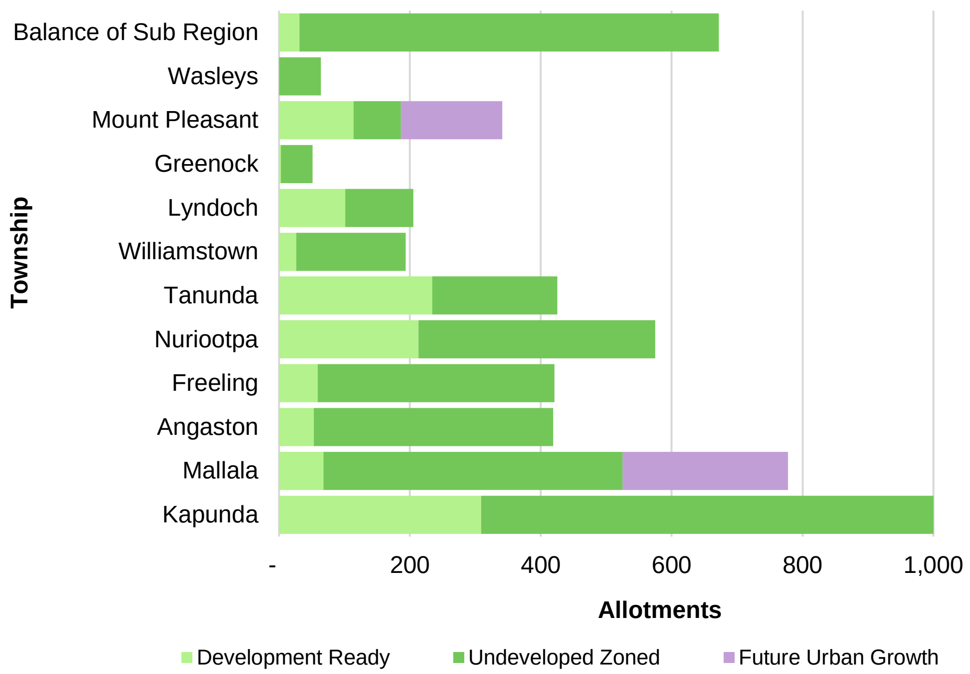


Table 9: Township land supply by development front – Northern Plains and Barossa, June 2020

STATUS	DEVELOPMENT READY		UNDEVELOPED ZONED		FUTURE URBAN GROWTH AREA	
Development Fronts	**Area (ha)**	**Lots**	**Area (ha)**	**Estimated Lots**	**Area (ha)**	**Estimated Lots**
Angaston	6	53	38	366	-	-
Freeling	6	59	34	362	-	-
Greenock	-	3	8	48	-	-
Kapunda	32	309	71	691	-	-
Lyndoch	9	101	10	104	-	-
Mallala	8	68	56	457	31	253
Mount Pleasant	31	114	20	72	43	155
Nuriootpa	25	213	43	362	-	-
Tanunda	27	234	22	191	-	-
Wasleys	-	-	7	64	-	-
Williamstown	2	26	16	168	-	-
Balance of region	5	31	103	641	-	-
TOTAL	**1,511**	**1,211**	**426**	**3,525**	**73**	**408**

7.5 Key Township development fronts

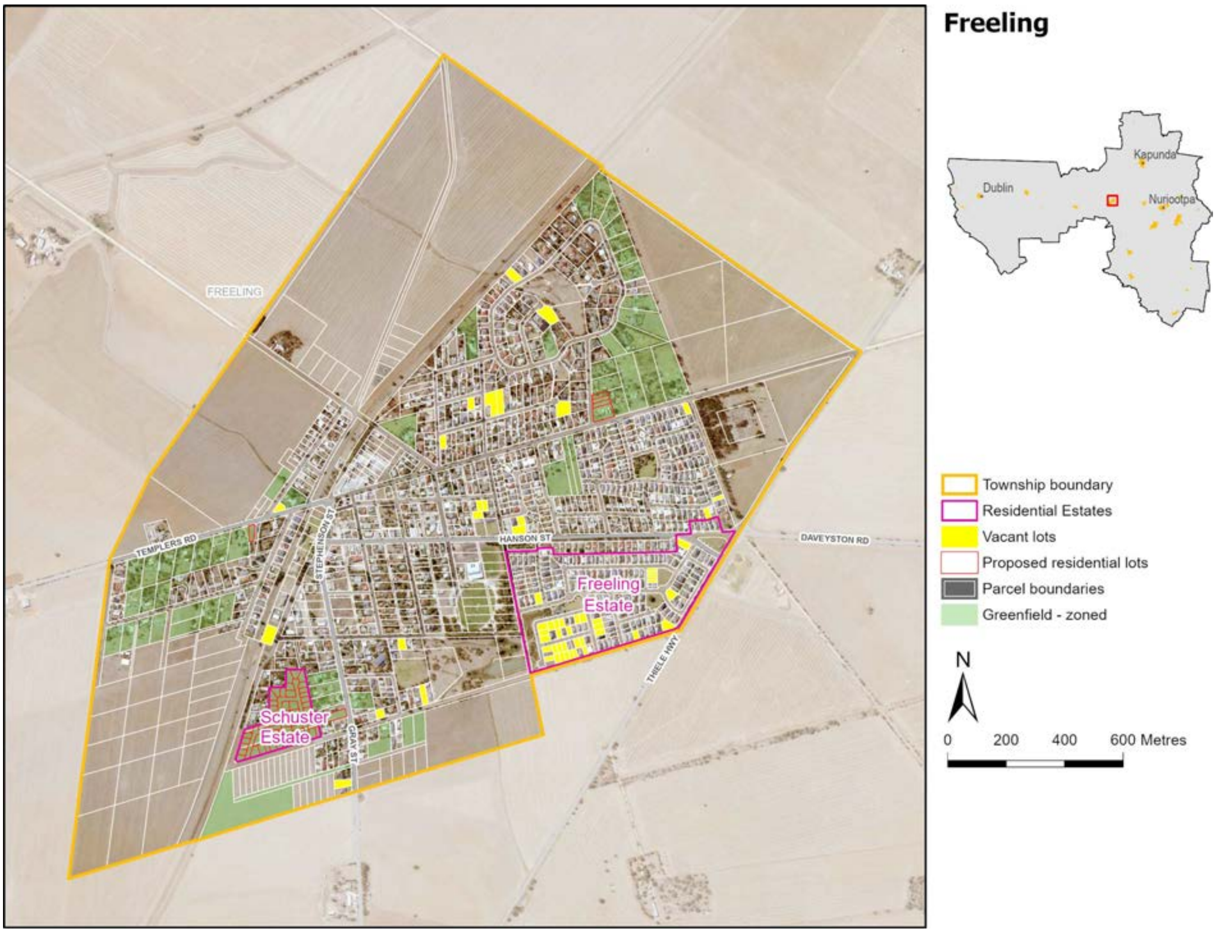
The following section provides analysis on Township development and land supply for the following precincts:

- Freeling
- Kapunda
- Lyndoch
- Nuriootpa
- Tanunda

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, key residential estates, vacant land supply (as of June 2020), proposed lots (June 2020) and land supply sources (Undeveloped Zoned and Future Urban Growth Area);
- A table summarising key measures, including total number of dwelling built to June 2020, and a breakdown of available land supply as of June 2020, by the following categories:
  - Vacant lots
  - Development Ready (proposed lots)
  - Undeveloped Zoned (estimated yield)
  - Future Urban Growth Area (estimated yield)
- Overview of development trends, land supply and infrastructure.

Figure 79: Freeling



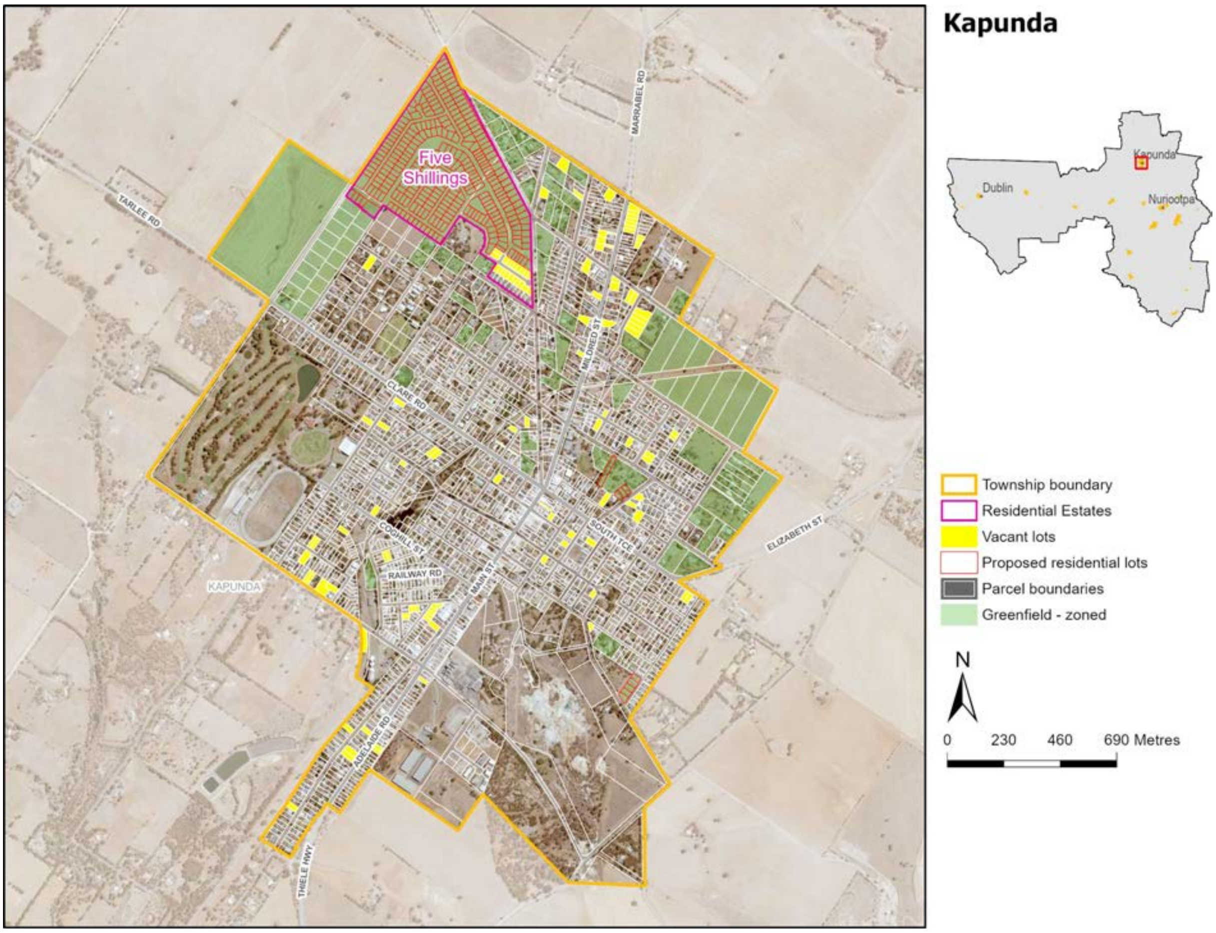
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built	312
Average dwellings built per annum	30
Remaining Potential Capacity	**481**
Vacant lots	60
Development Ready (proposed lots)	59
Undeveloped Zoned	362
Future Urban growth area	0

ANALYSIS

- 2 residential estates currently active.
- Land located in the south-western corner is zoned rural living, however does not appear to have had significant uptake.
- Future Township expansion is constrained by the Character Preservation District (Barossa) and the Environment and Food Production (EFPA) boundary.

Figure 80: Kapunda



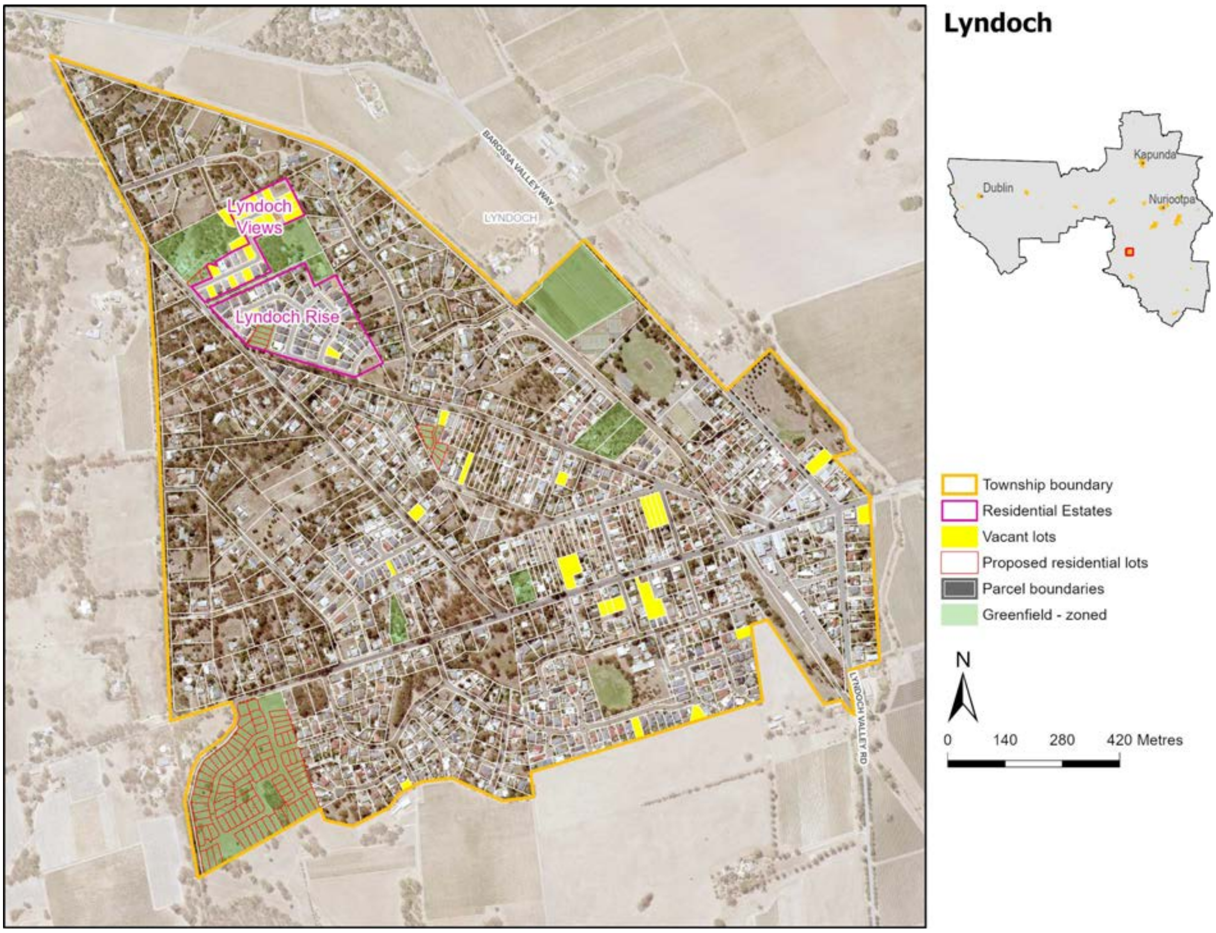
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built	117
Average dwellings built per annum	11
Remaining Potential Capacity	**1,127**
Market Ready (vacant lots)	127
Development Ready (proposed lots)	309
Undeveloped Zoned	691
Future Urban growth area	0

ANALYSIS

- There is currently just 1 active residential estate called 'Five Shillings' located in the north western corner of the township.
- Additional zoned land exists to the north-east and north-west, which would appear to be the next logical development fronts for the township.
- Future Township expansion past these available sources of land will be constrained to infill given the location of the Character Preservation District (Barossa) and the Environment and Food Production Areas (EFPA) boundary.

Figure 81: Lyndoch



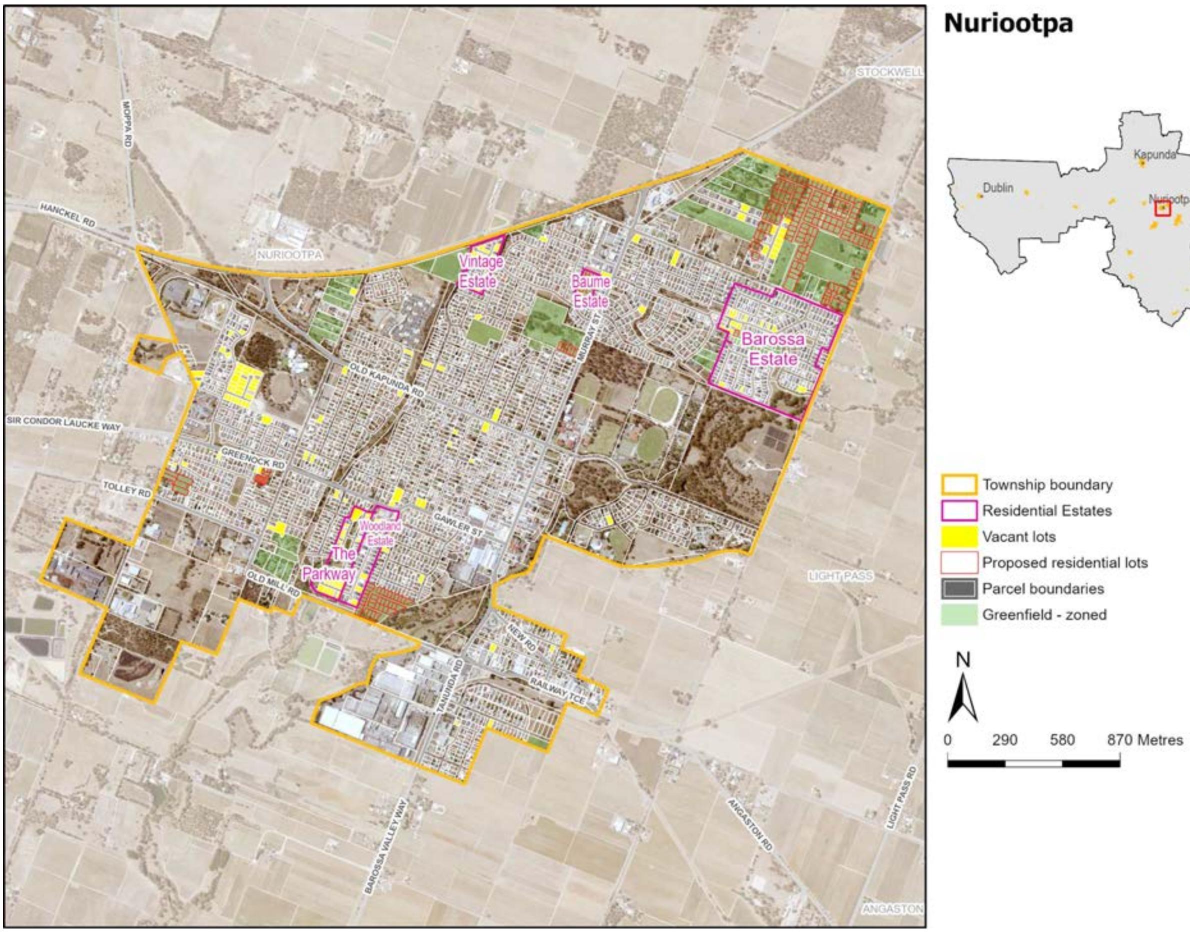
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built	138
Average dwellings built per annum	13
Remaining Potential Capacity	**250**
Vacant lots	45
Development Ready (proposed lots)	101
Undeveloped Zoned	104
Future Urban growth area	0

ANALYSIS

- There are currently 2 active residential estates located in the northern part of the township.
- A current proposal for approximately 80 allotments is under consideration for land located in the south-western section of the township.
- There is only one other zoned parcel of land located in the western section of the township that could support further residential development.
- Future Township expansion is constrained by the Character Preservation District (Barossa) boundary.

Figure 82: Nuriootpa



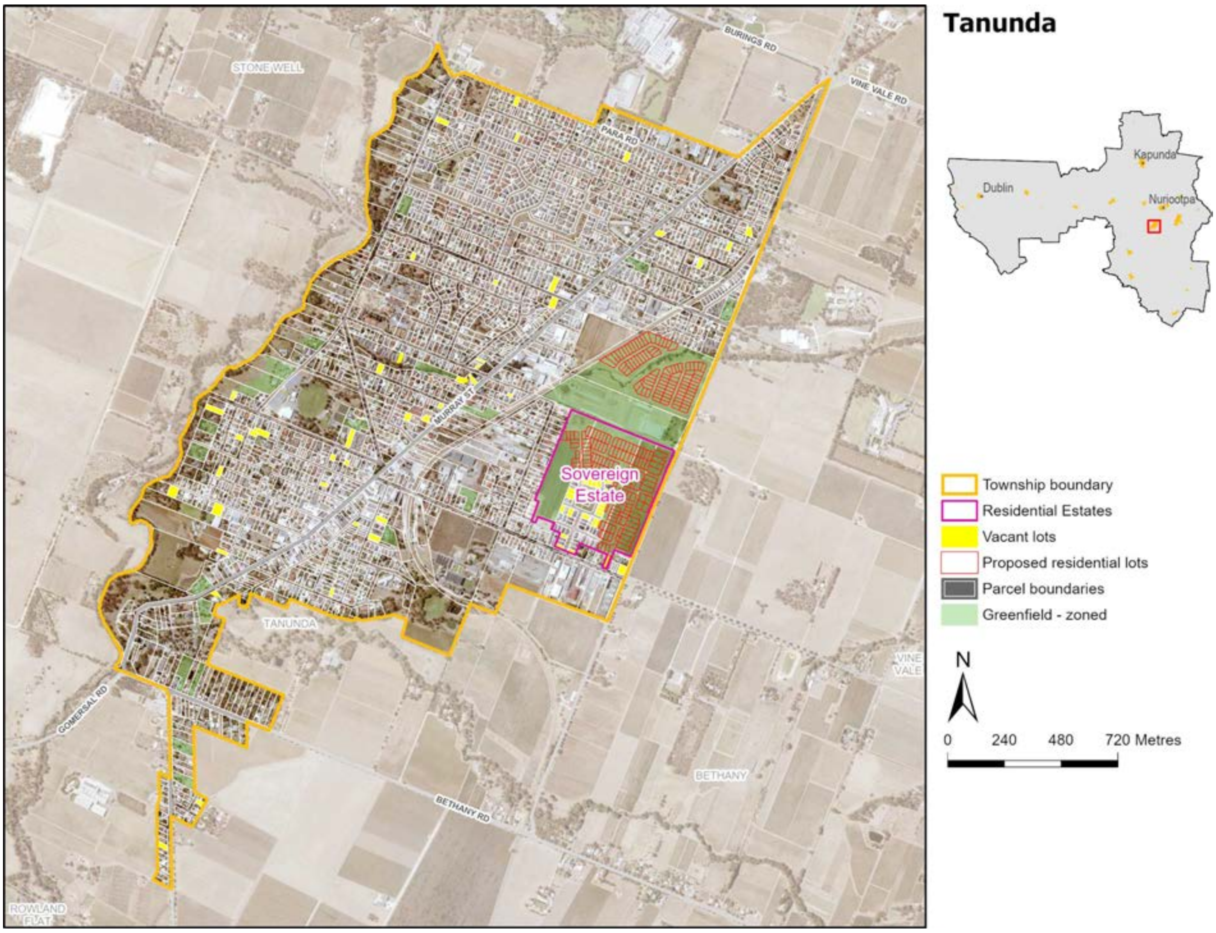
KEY MEASURES

Year Commenced	Pre-2010
Dwellings built	581
Average dwellings built per annum	55
Remaining Potential Capacity	**753**
Vacant lots	178
Development Ready (proposed lots)	213
Undeveloped Zoned	362
Future Urban growth area	0

ANALYSIS

- There are currently 5 active residential estates scattered throughout the township.
- The majority are well underway in terms of construction and creation of residential allotments.
- Once the zoned land to the north is developed there will be limited opportunities within the existing township boundary for future residential development, aside from infill.
- Future township expansion is restricted by the Character Preservation District (Barossa) boundary.

Figure 83: Tanunda



KEY MEASURES

Year Commenced	**Pre-2010**
Dwellings built	224
Average dwellings built per annum	21
Remaining Potential Capacity	**514**
Vacant lots	89
Development Ready (proposed lots)	234
Undeveloped Zoned	191
Future Urban growth area	0

ANALYSIS

- There is currently 1 active residential estate called Sovereign, located east of the established Township core.
- A proposal for additional allotments is located north of this estate on zoned land.
- Once this land is developed there will be limited opportunities for further residential development, aside from infill.
- Future township expansion is restricted by the Character Preservation District (Barossa) boundary.

7.6 Summary

Townships within the Northern Plains and Barossa region are constrained from future expansion by the Character Preservation District (Barossa). Therefore projected population growth must be accommodated within current township boundaries, utilising existing zoned and future urban land.

Township land supply within the Northern Plains and Barossa Region can be summarised as follows:

- 1,200 development ready allotments.
- Capacity to accommodate an additional 3,500 allotments on Undeveloped Zoned land.
- Capacity to accommodate an additional 400 allotments on identified Future Urban growth areas.
- There are a range of key infrastructure upgrades required to support future development.
- In addition to the above, as of June 2020 there were 1,000 vacant allotments. These have not been included in the analysis of available Township supply.

Growth Scenarios

Under a medium growth scenario, it is estimated that identified townships will need to accommodate an additional 115 dwellings a year. It is projected the high growth scenario will require an additional 1,900 dwellings within identified townships by 2030.

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