Executive summary

South East Queensland's population is projected to grow by more than 1.5 million people over the 23 years to 2031[1]. Planning for this growth is vital to ensure there is an appropriate supply of affordable and well-serviced housing available for our growing communities. While there is a greater emphasis on improving the efficiency of urban development in South East Queensland through infill and redevelopment, the development of broadhectare land will continue to provide for more than half our future housing needs.

This 2009 edition of the broadhectare study presents an update on the stocks of greenfield land and large redevelopment sites available for future residential development. This is based on existing approvals and applications and is consistent with the intent of the *Draft South East Queensland Regional Plan 2009–2031*. The preparation of this report involved consultation with South East Queensland (SEQ) local government authorities, the Urban Development Institute of Australia and a number of major developers, and their contributions are gratefully acknowledged.

The SEQ broadhectare study considers all parcels greater than 2,500 square metres for suitability, potential availability and, where relevant, future servicing intent for residential development. Parcels less than 2,500 square metres are considered if they are of the same ownership as a larger neighbouring parcel. All land planned for future residential use is considered, based on the permitted size of lot subdivision under each local government planning scheme.

[1] Department of Infrastructure and Planning, *Queensland's future population*, 2008 edition (medium series).
[2] Toowoomba Statistical District includes the former Toowoomba City and the growing residential areas of the surrounding former shires of Cambooya, Crows Nest, Jondaryan and Rosalie.

Broadhectare land stock

Table 1 presents a summary of the broadhectare land stocks and expected dwelling yields by local government area, including the split between urban (for higher density and detached housing) and low-density residential use. The estimates were prepared for all local governments as at November 2008.

The total area of broadhectare land identified for future residential development in SEQ was 47,215 hectares. Around 70 per cent of this land (32,767 hectares) will supply urban residential allotments, with the remaining 30 per cent (14,448 hectares) contributing larger, low-density residential lots.

Land for higher density developments, such as small lot subdivisions, was estimated to make up around 20 per cent (6,599 hectares) of the total urban residential stock. Just over half of this higher density urban broadhectare stock is located in Ipswich City (3,399 hectares). The remaining broadhectare land for higher density urban development was more or less evenly spread across the local government areas of Gold Coast, Logan, Moreton Bay, Sunshine Coast and Brisbane.

The stock of urban residential land for detached housing was estimated at 26,168 hectares in SEQ, with the larger contributors being Sunshine Coast Regional Council (5,144 hectares), Logan City (4,211 hectares) and Ipswich City (4,129 hectares).

Around 14,450 hectares of low-density residential land stock was identified in SEQ. The largest amount of land for low-density development was located in the regional councils of Lockyer Valley (3,176 hectares) and Moreton Bay (2,904 hectares), followed by Logan City (2,305 hectares) and Toowoomba Statistical District (2,176 hectares)[2].

Table 1: South East Queensland broadhectare stock and expected dwelling yield by local government area

Local government area	Broadhectare stock (hectares)				Expected dwelling yield (dwellings)			
	Higher density2	Detached urban	Low density	Total stock	Higher density2	Detached urban	Low density	Total dwellings
Brisbane (C)	578	2,253	10	2,840	32,645	24,795	15	57,455
Gold Coast (C)	681	2,836	1,159	4,676	30,086	18,176	1,183	49,444
Ipswich (C)	3,399	4,129	1,312	8,840	88,129	28,241	1,965	118,334
Lockyer Valley (RC)	8	896	3,176	4,080	438	6,250	3,194	9,881
Logan (C)	630	4,211	2,305	7,146	12,335	29,875	3,044	45,254
Moreton Bay (RC)	600	2,509	2,904	6,013	15,329	22,033	2,334	39,695
Redland (C)	94	593	100	788	3,018	6,239	150	9,407
Scenic Rim (RC)	8	1,386	307	1,702	164	9,213	595	9,972
Somerset (RC)	10	162	28	199	287	1,076	50	1,413
Sunshine Coast (RC)	591	5,144	971	6,706	18,053	43,922	1,111	63,086
Toowoomba (SD)[1]	0	2,050	2,176	4,226	10	8,573	2,412	10,995
South East Queensland	**6,599**	**26,168**	**14,448**	**47,215**	**200,493**	**198,392**	**16,051**	**414,936**

[1] Toowoomba Statistical District includes the former Toowoomba City and surrounding residential areas of Cambooya, Crows Nest, Jondaryan and Rosalie
[2] Higher density urban includes attached housing and small lot subdivisions.

Estimated dwelling yields

Dwelling yields for broadhectare parcels were estimated based on a number of factors, including local government planning scheme intent, existing approvals, reviews of available master plans and an analysis of residential densities achieved in comparable locations. These figures were further adjusted to expected dwelling yields based on the probability of development where ownership and fragmentation issues were relevant. The estimated dwelling yields by local government areas are included in Table 1.

Identified broadhectare land stocks in SEQ are expected to yield around 414,900 additional dwellings, with 96 per cent (398,900 dwellings) derived from urban residential broadhectare land. Low-density residential land accounts for only around 4 per cent, or 16,100 dwellings, of the total broadhectare yield.

Ipswich City was by far the largest contributor of additional dwelling yield from broadhectare land, with an estimated potential of 118,300 dwellings, or just under 30 per cent of the total for SEQ. Other key contributors include Sunshine Coast (63,100 dwellings), Brisbane (57,500), Gold Coast (49,400), Logan (45,300) and Moreton Bay (39,700).

The estimated higher density housing yield from urban residential stock in SEQ was 200,500 dwellings. Ipswich City accounted for the largest share at 88,100 dwellings, having contributed 44 per cent of broadhectare land in this category. Brisbane City (32,600 dwellings), Gold Coast City (30,100 dwellings), and Sunshine Coast (18,100) followed.

Broadhectare land for urban detached housing could yield an estimated 198,400 additional dwellings across SEQ. Sunshine Coast Regional Council and Logan City account for more than one-third with 43,900 and 29,900 additional detached dwellings respectively, while Ipswich City contributes an estimated 28,200 additional detached dwellings.

Estimated years of supply

The Department of Infrastructure and Planning's household projections were used to gauge future residential dwelling demand. This demand was then compared to broadhectare land stocks and existing vacant residential lots to assess the estimated years of supply. The results indicate that SEQ has 15 years supply of residential land (using a medium series household projection scenario). However, this is an illustrative figure only as not all future development will occur on broadhectare parcels. SEQ local governments will increasingly look to infill and redevelopment to provide sufficient housing choice for their future populations.

Ipswich City has both the largest estimated residential dwelling yield and the longest period of available supply at 24 years. The regional councils of Lockyer Valley (22 years), Scenic Rim (19 years) and Sunshine Coast (19 years) also show substantial years of supply of broadhectare land.

By comparison, the local government areas of Brisbane, Gold Coast, Redland, Somerset and Toowoomba are forecast to have 10 years or less supply of residential land, but only if all of their future housing demand was met by broadhectare land. This is unlikely, as infill and redevelopment will increasingly contribute to the future housing supply.

Local government results

The dwelling yields in the following local government summaries are adjusted to account for expected development rates and include an assessment of vacant residential lots.

Brisbane

The majority of broadhectare land stock in Brisbane City has urban residential development intent with 2,830 hectares identified. Only 10 hectares of low-density residential land remain. The potential dwelling yield, including the capacity of vacant residential lots, is 63,000 dwellings. The dwelling yield has increased since the previous Brisbane broadhectare study released in early 2008 due to the inclusion of urban development areas at Bowen Hills, Fitzgibbon and Northshore Hamilton.

For illustrative purposes, when matched against forecast demand, there is 10 years of broadhectare land supply remaining in Brisbane City. However, development also occurs through infill and redevelopment which further increases the years of supply. Under the draft South East Queensland Regional Plan, an estimated 156,500 additional dwellings will be required by 2031 to house Brisbane's share of expected regional growth. An increase in residential land supply could occur with the inclusion of Lower Oxley Creek which is currently under investigation and has the potential to add approximately 6,000 dwellings over the next 20 years.

Gold Coast

Broadhectare land supply is diminishing in Gold Coast City, particularly larger sized parcels. Gold Coast City has 4,676 hectares of available broadhectare land stock, of which three-quarters will be used for urban residential development and one-quarter for low-density residential development.

The potential number of dwellings is 49,400, including existing vacant lots (based on expected yields and adjusted to reflect potential development rates). The draft South East Queensland Regional Plan estimates an additional 137,500 dwellings will be required by 2031 to house Gold Coast's future population. For illustrative purposes, when matched against future demand, there is nine years of broadhectare land supply based on the medium household projection series. While the draft South East Queensland Regional Plan identifies Coomera as a future growth area, clearly not all future dwelling demand will be met through broadhectare land but also accommodated through infill and redevelopment.

Ipswich

Ipswich City has the largest broadhectare stock holding in SEQ: sufficient to adequately meet its forecast dwelling requirement to 2031 of 116,000 dwellings. The stock of 8,840 hectares is primarily located in Springfield and Ripley Valley. Combined with the stock of vacant residential lots, around 118,300 additional dwellings could be accommodated, when adjusted to reflect potential development rates. For illustrative purposes, when matched against forecast demand, the amount of broadhectare land remaining is 24 years of supply.

Under the draft South East Queensland Regional Plan, a significant proportion of SEQ's future population growth is planned for Ipswich City, including potential residential land supply at Rosewood.

Lockyer Valley

Lockyer Valley Regional Council has the largest amount of low-density broadhectare land in SEQ, reflecting its rural nature. It currently has 3,176 and 904 hectares of low-density and urban residential broadhectare land respectively.

The potential number of dwellings that could be constructed, based on expected dwelling yields and adjusted to reflect potential development rates, is 9,900 dwellings (including existing vacant lots). For illustrative purposes, when matched against future demand, the amount of broadhectare land remaining provides 22 years of supply.

Logan

Logan City has the second largest supply of broadhectare land in SEQ at 7,146 hectares. Further development potential was identified in Park Ridge with an additional 12,000 dwellings to be constructed. The draft South East Queensland Regional Plan also identifies Flagstone and Yarrabilba as growth areas in Logan City.

Land intended for urban residential development accounts for two-thirds of broadhectare stock (4,841 hectares), while low-density residential land contributes the balance (2,305 hectares). The potential number of dwellings that could be constructed is 45,300 dwellings. This is based on expected dwelling yields and adjusted to reflect potential development rates, including existing vacant lots. For illustrative purposes, when matched against future demand, the amount of broadhectare land supply remaining is 16 years.

Moreton Bay

Moreton Bay Regional Council has marginally more urban residential broadhectare land (3,109 hectares) than low-density residential (2,904 hectares). Substantial urban residential development is currently occurring in North Lakes, Mango Hill and Griffin.

Broadhectare stock and existing vacant lots could yield 39,700 additional dwellings, when totals are adjusted to reflect potential development rates. For illustrative purposes, when matched against future demand, the amount of broadhectare land remaining is 11 years of supply. However, future residential land stocks may be boosted by the inclusion of an area in the western part of the former Caboolture Shire identified as a growth area in the draft South East Queensland Regional Plan.

Redland

Redland City has the smallest amount of broadhectare land of all urban local government authorities in SEQ. The majority of broadhectare land (687 hectares) is intended for development at urban residential densities, with a further 100 hectares for low-density residential development primarily located at Birkdale and Thornlands.

The total dwelling yield from broadhectare land and existing vacant lots is 9,400 dwellings, adjusted to reflect potential development rates. For illustrative purposes, when matched against future demand, the amount of broadhectare land remaining is eight years of supply. The draft South East Queensland Regional Plan also indicates two future growth areas of Kinross Road and south east Thornlands which will increase land supply in the short- to medium-term. Infill residential development will increasingly be required to ensure there is sufficient housing supply in Redland City.

Scenic Rim

Scenic Rim Regional Council has 1,394 and 307 hectares of urban and low-density residential broadhectare land respectively. Future residential development will focus around the existing towns and villages such as Beaudesert, Boonah and Kooralbyn.

The potential number of dwellings that could be constructed—based on expected dwelling yields and adjusted to reflect potential development rates—is 10,300 dwellings, including existing vacant lots. For illustrative purposes, when matched against future demand, the amount of broadhectare land remaining provides 19 years of supply.

Somerset

Somerset Regional Council, the largest council by land area in SEQ, has the smallest amount of broadhectare stock at just 199 hectares. The combination of broadhectare stock and existing vacant lots could yield 1,400 additional dwellings when adjusted to reflect potential development rates. For illustrative purposes, when matched against future demand, the amount of broadhectare land remaining provides eight years of supply currently zoned residential. However the Urban Footprint allows existing towns to accommodate anticipated future residential growth.

Sunshine Coast

More than 85 per cent of available broadhectare land in Sunshine Coast Regional Council is intended to be developed at urban densities (5,735 hectares), with the remaining 971 hectares for low-density residential development. Sunshine Coast's residential land supply has increased primarily as a result of Palmview and Bells Creek (Caloundra South) being identified as urban growth areas in the draft South East Queensland Regional Plan.

The 6,706 hectares of broadhectare stock could yield 63,100 additional dwellings, including existing vacant lots and adjusted to reflect potential development rates. For illustrative purposes, when matched against future demand, the amount of broadhectare land remaining is 19 years of supply.

Toowoomba Statistical District

Toowoomba Statistical District includes the former Toowoomba City and the growing residential areas of the former surrounding shires of Cambooya, Crows Nest, Jondaryan and Rosalie. More than 4,200 hectares of broadhectare land is identified for residential use: 2,050 hectares intended for urban residential development and 2,176 hectares for low-density development.

The estimated dwelling yield for Toowoomba Statistical District is an additional 11,000 dwellings, including existing vacant lots and adjusted to reflect potential development rates. For illustrative purposes, when matched against future demand, the amount of broadhectare land supply remaining is nine years of supply. However this supply will be supplemented by establishing a program of infill and redevelopment. While Toowoomba Statistical District does attract some higher density dwelling developments, these are generally on parcels below the broadhectare study parcel lower threshold of 2,500 square metres and are therefore not captured in this assessment.