

Urban Development Program



2012

Regional
Residential
Report

Shire of
Mitchell

ACKNOWLEDGEMENTS

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EXECUTIVE SUMMARY

The Urban Development Program for Regional Victoria provides an analysis of supply and demand for residential and industrial land across parts of regional Victoria. The initial municipalities covered were Ballarat, Greater Bendigo, Latrobe and Wodonga. The next round of completed land supply assessments include the municipal areas of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura, as well as the G21 consortium of councils. This 'round' of land supply assessments includes the following municipalities: Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland.

This component provides information on residential supply and demand for the Shire of Mitchell.

The following residential land supply assessment was undertaken by Spatial Economics Pty Ltd and commissioned by the Department of Transport, Planning and Local Infrastructure in conjunction with the Shire of Mitchell.

It draws on important information and feedback obtained through a number of comprehensive consultations with key council officers, and Department of Transport, Planning and Local Infrastructure regional officers undertaken through the course of the project.

Note that this report covers residential land outside of the Urban Growth Boundary (as at March 2012). This includes the northern part of Wallan, further referred to within this report as 'Wallan (north)'; but does not include Beveridge or the southern part of Wallan. Residential land supply areas that fall within the Urban Growth Boundary are assessed as part of the metropolitan Melbourne Urban Development Program.

RECENT ACTIVITY

As measured from July 2006 to March 2012 residential building approval activity within the municipal area of Mitchell has averaged 425 per annum. The amount of building approval activity as measured on an annual basis has been relatively inconsistent, approvals peaked at 576 in 2010-11 and troughed at 241 in 2007-08.

The majority (91% or 387 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Mitchell – South.

From July 2006 to March 2012 there was an average annual residential lot construction of 334. The majority (84%) were broadacre/major infill lots, followed by minor infill lot construction at 12% and 4% rural residential.

The majority (54%) of residential lot construction activity was located within Wallan (north), followed by Kilmore (28%) and Broadford (12%).

PROJECTED DEMAND

Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2026 there will be a total dwelling requirement of 4,696 (313 average per annum). This does not include dwelling requirements for the area within the Urban Growth Boundary, which includes Wallan (south) and Beveridge.

Note that the population growth numbers and dwelling requirements for Mitchell (S) – South, outside of the Urban Growth Boundary, are estimates based on *Victoria in Future 2012* projections.

IDENTIFIED RESIDENTIAL LAND SUPPLY

In total (excluding minor infill) there is a residential lot supply of approximately 7,364. This is comprised of:

- 7,157 zoned broadhectare/major infill lots (97% of supply); and
- 207 vacant rural residential lots (3% of supply).

As at December 2009, there was 757 minor infill lots identified. Of these lots, 573 were sized less than 1,200sqm or 76% of the identified lots.

As at March 2012, there was a zoned residential lot capacity within broadhectare areas of approximately 7,157, of which 59% (4,236 lots) is located in Wallan (north), 22% (1,544 lots) in Kilmore, 9% (676 lots) in Seymour and 9% (624 lots) in Broadford.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 514 lots per annum will be constructed within existing zoned broadhectare areas.

Within the municipality of Mitchell (outside of the Urban Growth Boundary), there are no future residential areas identified.

As at December 2009 across the municipality of Mitchell there was a total lot stock of rural residential allotments of 1,961. Of this stock, 207 lots were vacant, a lot vacancy rate of 11%.

YEARS OF RESIDENTIAL LAND SUPPLY

VICTORIA IN FUTURE 2012 DEMAND

In terms of zoned broadhectare and major infill residential land stocks it is estimated based on the identified supply and projected demand for the Shire of Mitchell (outside of the Urban Growth Boundary), there are sufficient land stocks to satisfy 15+ years of future demand.

Zoned broadhectare and major infill supply by SLA is sufficient to satisfy:

- 15+ years: Mitchell (S) - North SLA; and
- 15+ years: Mitchell (S) - South SLA (outside of Urban Growth Boundary).

In terms of future residential areas, there are no stocks currently identified within the Mitchell Shire outside of the Urban Growth Boundary.

CONCLUSIONS AND CURRENT ACTIONS

In summary there are currently 15+ years of zoned residential land supply to meet *Victoria in Future 2012* based demand rates across the Shire of Mitchell (outside of the Urban Growth Boundary).

In terms of future residential land supply stocks, there is no future identified residential stock within the Mitchell (S) - North SLA (Pyalong, Seymour, Tallarook and Toobarac), or in Mitchell (S) - South SLA outside of the Urban Growth Boundary

Consumption of residential land, however, should continue to be monitored to ensure there are sufficient land stocks to meet future demand, and identify any impediments to the delivery of allotments in the short-term.

Amendment C79 to the Mitchell Planning Scheme proposes to implement a number of the recommended actions included in the Kilmore Strategy Plan June 2008. The amendment proposes to rezone land for both residential and industrial purposes, and apply overlays to various parcels of land to guide the future development of the Kilmore Township and environs.

INTRODUCTION

1.1 PURPOSE AND CONTEXT

The Urban Development Program was set up in 2003 to assist in managing the growth and development of metropolitan Melbourne and the Geelong region, and help ensure the continued sustainable growth of these areas in order to maintain their high levels of liveability. The primary purpose of the Urban Development Program is to improve the management of urban growth by ensuring that government, councils, public utilities and the development industry have access to up-to-date and accurate information on residential and industrial land availability, development trends, new growth fronts, and their implications for planning and infrastructure investment.

To achieve the primary purpose the Urban Development Program provides accurate, consistent and updated intelligence on residential and industrial land supply, demand and consumption. This in turn assists decision-makers in:

- maintaining an adequate supply of residential and industrial land for future housing and employment purposes;
- providing information to underpin strategic planning in urban centres;
- linking land use with infrastructure and service planning and provision;
- taking early action to address potential land supply shortfalls and infrastructure constraints; and
- contributing to the containment of public sector costs by the planned, coordinated provision of infrastructure to service the staged release of land for urban development.

The information contained and reported within the Urban Development Program enables early action to be taken in areas where land shortfalls have been identified.

1.2 PROGRAM CONTEXT

During 2009-2010, the Urban Development Program was expanded across key provincial areas across regional Victoria, and is incrementally being rolled out across the State. Initially, these included the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga. The next group of land supply assessments for completion include the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura; as well as the G21 consortium of councils.

This 'round' of land supply assessments includes the following municipalities: Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland.

The expanded Urban Development Program into regional Victoria will build local and regional data bases and, importantly, provide a platform for mapping and spatial analysis in each region. This will in turn allow councils and other key stakeholders in the planning and development sectors to make more informed decisions in the growth and investment of these key areas across regional Victoria.

The residential and industrial land supply assessments for Mitchell Shire were undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Transport, Planning and Local Infrastructure in conjunction with the associated councils.

1.3 2012 URBAN DEVELOPMENT PROGRAM REPORTS

The 2012 Urban Development Program Reports for Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland, as well as additional Regional Reports and the metropolitan Urban Development Program Annual Report, are available online at www.dpcd.vic.gov.au/urbandevelopmentprogram

Interactive online maps are also available. MapsOnline enables users to search for specific projects, generate reports and print or download maps and statistical reports. It allows users to search for specific land supply areas by region or municipality, estate name, Melway reference, street address or lot number.

To access the Regional Urban Development Program MapsOnline visit www.land.vic.gov.au/udp

For more information about the Urban Development Program, email the Department of Transport, Planning and Local Infrastructure at urbandevelopment.program@dpcd.vic.gov.au

2.0 APPROACH & METHODOLOGY

The following provides a brief outline of the major methodologies and approach in the assessment of recent residential lot construction, residential land supply, projections of demand and determining the years of supply of current land stocks. In addition, key definitions of terms used within the following assessment are detailed in the glossary of terms at the end of this report.

Information is presented at both a Statistical Local Area (SLA) and suburb (Australian Bureau of Statistics definition) level. A map highlighting the location of these boundaries is located within the data appendices. The report retains ABS terminology for the geographic areas, however it is appreciated that the term 'suburbs' includes urban and rural areas.

Assessments of land supply are dependant on the availability of aerial imagery. The most current imagery available for this assessment was taken during the summer of 2009/2010.

Note that for the purposes of this report the regional component of the expanded Urban Development Program is referred to as the 'Regional Urban Development Program'.

ESTIMATING FUTURE DWELLING REQUIREMENTS

The Population and Household Projections 2011-2031 for Victoria and Its Regions, released by the (former) Department of Planning and Community Development and outlined in *Victoria in Future 2012*, are used by the Regional Urban Development Program as the basis for determining projected demand for residential allotments. Demand information is assessed at both a municipal level and by the component Statistical Local Areas (SLAs).

RESIDENTIAL LAND

In the following land supply assessments residential lot construction and land supply have been designated by differing supply types, namely:

Minor Infill: Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot less than 1ha.

Major Infill: Undeveloped land or sites identified for redevelopment within the existing urban area, zoned for residential development, and parent lot or existing lot greater than 1ha.

Broadhectare: Undeveloped land generally located on the urban fringe, zoned for residential development (no previous urban development activity), and the parent lot greater than 1ha.

Future Residential: Land identified by the relevant municipal authority for future residential development and current zoning not supportive of 'normal' residential development. Land which has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.

Rural Residential: Land zoned or identified for future Low Density Residential (LDRZ) or Rural Living (RLZ).

RESIDENTIAL LOT CONSTRUCTION

Residential lot construction has been determined via the processes established within the State Governments Housing Development Data project. It involves the extensive cleaning of the residential cadastre and the application of this cadastre to the land supply types identified above.

A constructed lot is defined by the year of construction and the finalisation of certificate of title.

Construction activity has been assessed on an annual basis as at July of each year from 2005 to 2011.

LOT YIELDS

Lot yields have been established on a parcel by parcel basis for the following land supply types: major infill, broadhectare and future residential.

In establishing the lot yield for each individual land parcel the following information was used: incidence and location of native vegetation, zoning, natural features such as creeks, old mineshafts, escarpments, floodways, localised current/recent market yields, existing studies such as structure plans, municipal strategic statements etc.

In addition to site specific issues, 'standard' land development take-outs are employed, including local and regional. The amount/proportion of such take-outs are dependent on the site of the land parcel i.e. a 1ha site will have less take-outs than say a 50ha site. This approach has been utilised by both the residential and industrial land supply assessments since 2004 in the metropolitan Urban Development Program.

Further intelligence and verification is sourced from local council planning officers.

A small number of supply sites have been allocated a zero lot yield due to a number of varying factors, these include but not limited to:

- unlikely to be developed over the next 15 years due to issues such as significant ownership fragmentation on relatively small parcels of land;
- subdivision restricted until sewerage is provided;
- the site is within an area of low demand and is unlikely to be developed with any certainty within the foreseeable future; and
- potential/likely lot density could be low.

Sites with a zero lot yield have been identified and are summarised by location and area.

DEVELOPMENT TIMING

Staging for lot construction or development timing has been established for four broad time periods, namely:

- 1 to 2 years (2012–2013);
- 3 to 5 years (2014–2016);
- 6 to 10 years (2017–2021);
- 11 years or more (2022 and beyond); and
- No timing.

Land identified for development over the next 2 years is available for residential purposes, and the required permits to subdivide the land generally exist and are being implemented.

Land parcels identified for development in 3 to 5 years are normally zoned, or may have rezonings finalised or approaching finalisation. They may also have permits to subdivide the land. Some degree of confidence can be applied to the timing and staging of these developments.

Confidence about lot yields and staging declines for developments proposed beyond 5 years as it is industry practice to regard developments beyond this period with less certainty in terms of exact staging, timing and yields.

A no timing category has been established for potential residential development sites that are within low demand areas (generally small outlying settlements). These sites typically in addition are allocated a zero potential lot yield. They are identified as potential and are measured by area.

Where land has been identified as 'Future Residential' there are no associated timings, as these cannot be confidently applied until such time the land is zoned to allow residential development to occur. Similarly, land which is within an Urban Growth Zone, where a precinct structure plan has not been approved, falls into a similar category. At such time a precinct structure plan has been prepared and approved, potential timings of residential development associated to these areas can be applied with a higher degree of confidence.

It should also be noted that timing of lot construction is cyclical, and highly dependent on underlying demand, economic cycles and industry capacity. This can mean that stated development intentions will vary from on-the-ground construction activity over time and by location. However, it is highly accurate in terms of the general direction and amount of growth.

Development timings have only been established for both Major Infill land supply stocks and broadhectare land.

Anticipated development timings are primarily sourced from existing planning permits, historic and current market activity, knowledge of industry capacity, projected demand and most importantly intelligence from local council staff.

RURAL RESIDENTIAL

Rural Residential allotments have been established via the assessment of the cadastre and zoning information. All allotments zoned either Rural Living (RLZ) and Low Density Residential (LDRZ) is included. Custom technology as described above was utilised to establish the stock of vacant low density allotments, this was subsequently verified via a manual process in conjunction with aerial imagery. The assessment is undertaken on the date of the latest aerial imagery.

YEARS OF SUPPLY FOR RESIDENTIAL LAND

A key purpose of the Regional Urban Development Program is to identify if sufficient residential land is available to meet projected dwelling requirements within the relevant municipal area. Sufficient stock of residential land is required to maintain an ongoing supply to the market and to contribute to:

- adequate competition in the land development market to avoid unnecessary upward pressure on land prices and housing affordability; and
- sufficient lead times for planning and service provision agencies to undertake appropriate strategic and infrastructure planning activities.

For the purpose of reporting on the years of supply of residential stocks, the Regional Urban Development Program assesses the existing stock of residential land (major infill, broadhectare and future residential) relative to projected demand.

In assessing the number of years of broadhectare, major infill and designated future (unzoned) residential land supply, only a component of the total projected demand is apportioned to estimate future demand for broadhectare and major infill supply. The remainder is apportioned for future demand for other forms of residential supply such as low density and rural living.

The number of 'years of supply' of residential land is undertaken at both a municipal level (total) and by Statistical Local Area. Years of supply is expressed for both the total zoned stocks of identified residential land and future residential land stocks.

Two projected demand scenarios are illustrated:

- Dwelling requirements contained within the (former) DPCD's Population and Household Projections (*Victoria in Future 2012*); and
- Recent residential building approval trends (2006 to 2012).

Both sets of projections are discounted by the historic average of total broadhectare and major infill lot construction relative to total residential lot construction activity. In addition, the historic trend scenario applies the projected proportional rate of change as identified within the population projections.

3.0 OVERVIEW

Mitchell is located 40 km north of Melbourne with the Melbourne Urban Growth Boundary reaching into the southern parts of the Shire. As of the 2011 census, there were 34,600¹ residents living in the Mitchell Shire. The main towns in Mitchell Shire are Beveridge, Broadford, Heathcote Junction, Kilmore, Puckapunyal, Pyalong, Reedy Creek, Seymour, Tallarook, Tooborac, Wallan and Wandong.

Mitchell's proximity to Melbourne means that many households choose to make a lifestyle choice and take advantage of affordable housing supported by key infrastructure to live in Mitchell and commute to Melbourne.

Traditionally the major towns for urban growth in the Shire have been Seymour, Kilmore and Broadford. Over the last two decades Wallan and the rural residential settlement of Wandong-Heathcote Junction have developed considerably with their capacity to offer attractive rural lifestyle housing locations in close proximity to Melbourne. Rural areas generally in the southern part of the Shire have also proved very attractive for hobby farm and rural living. Limited development has also occurred in small traditional towns like Pyalong and Tooborac².

This report covers the trends and shifts in building activity across the municipality of Mitchell, and provides an insight into proposed future residential development activity.

The information in this section has been compiled resulting from a number of comprehensive consultations with key representatives from the Shire of Mitchell. It is supported by datasets from the Australian Bureau of Statistics.

¹ Australian Bureau of Statistics

² Shire of Mitchell Planning Scheme

4.0 RECENT ACTIVITY

This section of the report details the recent activity of residential lot construction and dwelling approvals achieved across the municipal area of Mitchell. Residential lot construction activity is detailed from July 2006 to March 2012 and is presented at a suburb, Statistical Local Area (SLA) and municipal level. Residential lot construction is further analysed by supply type/location, namely:

- Minor Infill;
- Broadhectare/Major Infill (combined); and
- Rural Residential.

4.1 RESIDENTIAL BUILDING APPROVALS

As measured from July 2006 to March 2012 residential building approval activity within the municipal area of Mitchell has averaged 425 per annum. The amount of building approval activity as measured on an annual basis has been relatively inconsistent, approvals peaked at 576 in 2010-11 and troughed at 241 in 2007-08. As measured to the March Quarter 2012 there has been 547 residential dwelling approvals.

Note that these figures are for the municipality. The majority of these approvals were in areas outside of the Urban Growth Boundary.

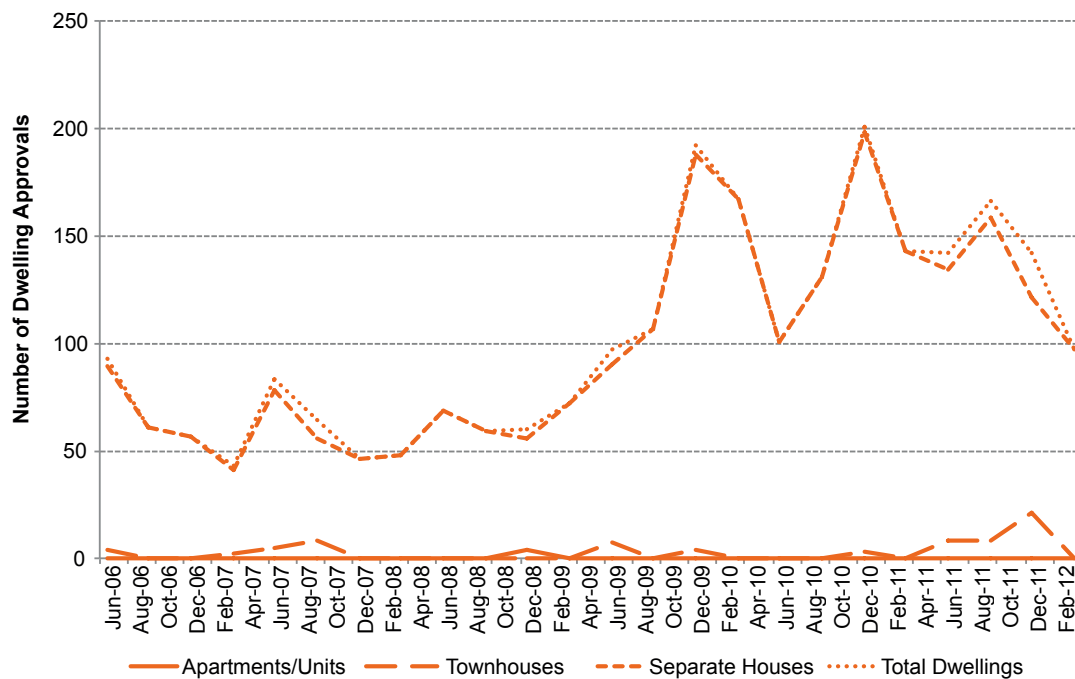
Graph 1 illustrates the amount of building approval activity by dwelling type on a quarterly basis for the Shire of Mitchell.

The vast majority of building approvals (97%) since July 2006 have been separate houses, 3% semi-detached dwellings and 0% for units/apartments.

The majority (91% or 387 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Mitchell – South, comprising the urban areas of Wallan (north) and Kilmore.

There was an average of 38 residential building approvals within the SLA of Mitchell – North.

Graph 1: Number of Residential Building Approvals by Type, July 2006 to March 2012



Source: Australian Bureau of Statistics, Catalogue No.8731.0

4.2 RESIDENTIAL LOT CONSTRUCTION

Analysis has been undertaken to determine on a lot by lot basis the location and amount of residential lot construction activity from July 2006 to March 2012. Lot construction activity has been classified into distinct supply types and or supply locations as defined above.

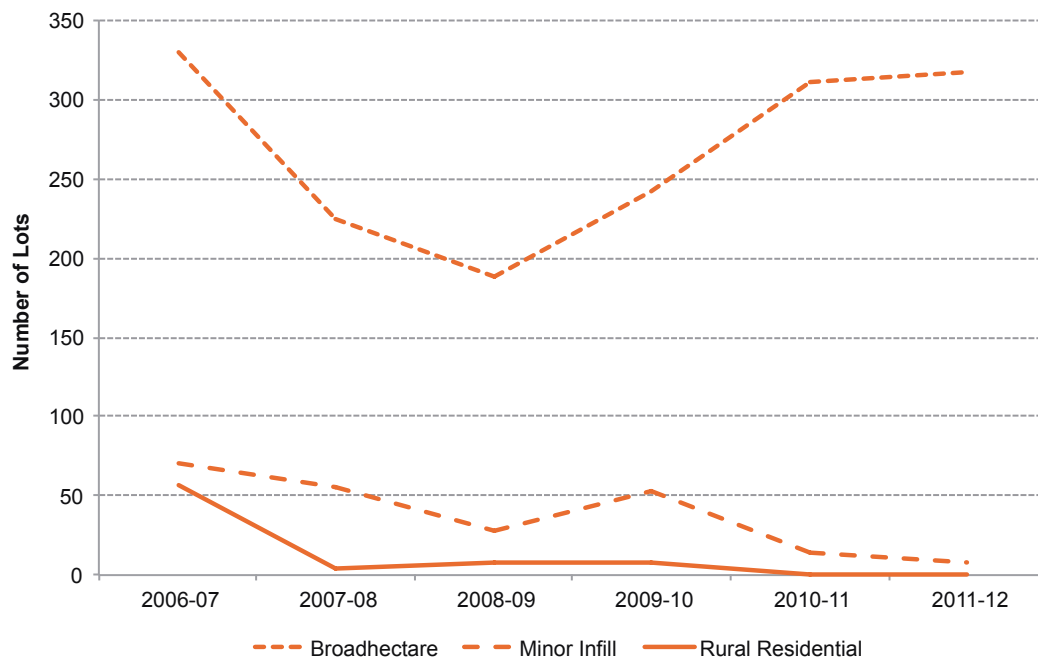
Graph 2 summarises the amount of residential lot construction by supply type for the municipal area of Mitchell outside of the Urban Growth Boundary. From July 2006 to March 2012 there was an average annual residential lot construction of 334. The majority (84%) were broadacre/major infill lots, followed by minor infill lot construction at 12% and 4% rural residential.

In comparison to the annual volume of residential building approvals, residential lot construction varies considerably. Residential lot construction was the lowest in 2008-09 at 224 lots and 'peaked' in 2006-07 at 458 lots. As measured to the March Quarter 2012 there have been 325 residential lots constructed.

The lot construction variance over-time is a typical trend illustrated from the land development industry and indicates no significant supply or policy issues.

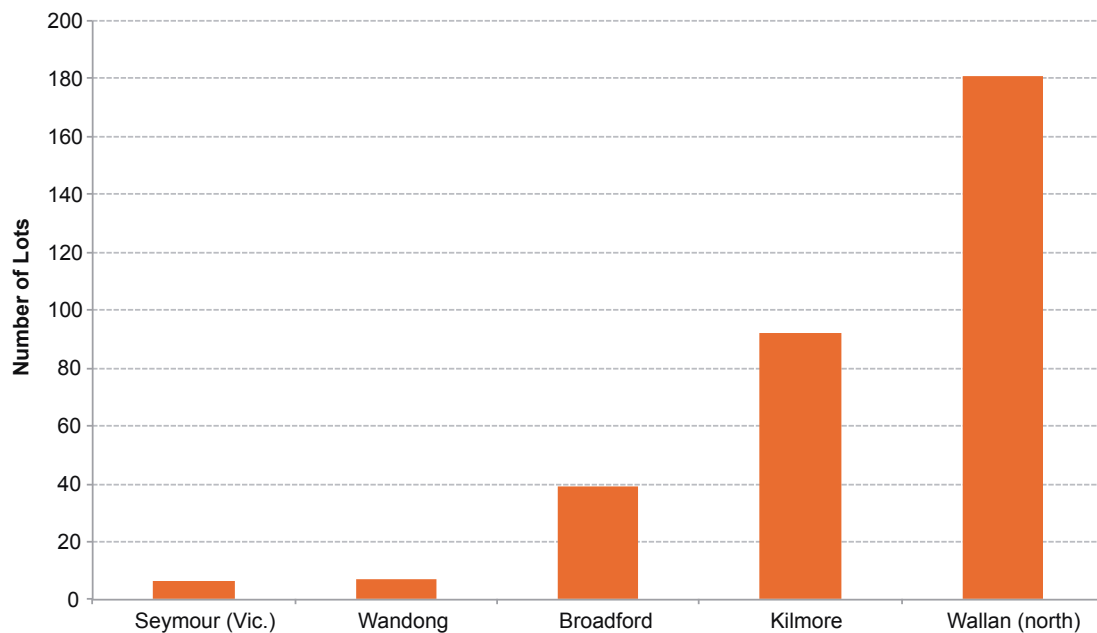
Graph 3 illustrates the average annual volume of all residential lot production by suburb. The majority (54%) of residential lot construction activity was located within Wallan (north), followed by Kilmore (28%) and Broadford (12%).

Graph 2: Number of Residential Lots Constructed by Supply Type, July 2006 to March 2012



Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Graph 3: Average Annual Number of Residential Lots Constructed by Suburb, July 2006 to March 2012



Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Note: Includes – broadhectare, major infill, minor infill and rural residential lot construction.

4.2.1 MINOR INFILL LOT CONSTRUCTION

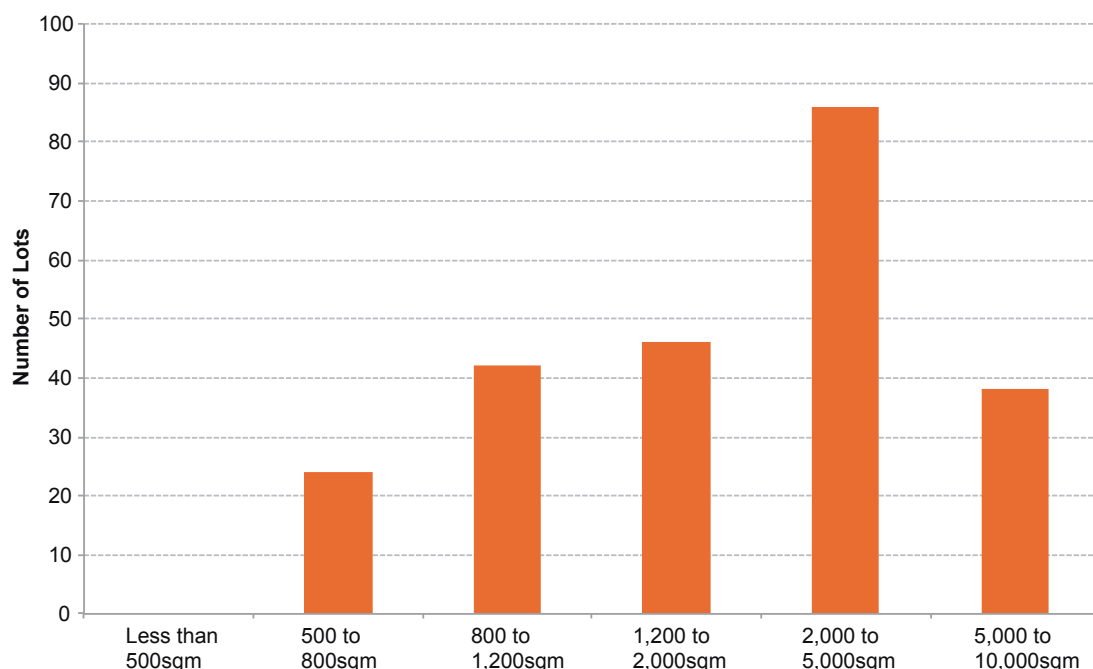
Minor infill lot construction activity as measured from July 2006 to March 2012 across the municipal area of Mitchell (outside of the Urban Growth Boundary) averaged 41 lots per annum. This represents 11% of all residential lot construction activity across the municipal area.

Minor infill lot construction activity was concentrated within the established urban areas of Kilmore (36% of activity), Wallan (north) (24%), Seymour (16%) and Broadford (15%).

As measured annually from July 2006 to March 2012, the amount of minor infill lot construction activity has varied significantly. In 2009-10 there were approximately 53 minor infill lots constructed, decreasing to 14 in 2010-11. As measured to the March Quarter 2012 there have been only 8 minor infill lots constructed.

Of the 226 minor infill lots constructed 28% were constructed on 'parent' lots sized less than 1,200sqm. There were no lots constructed on 'parent' lots less than 500sqm. There were 86 lots constructed (36%) on parent lots sized from 2,000 to 5,000sqm. Graph 4 summarises the volume of minor infill lot construction by 'parent' lot size cohorts.

Graph 4: Parent Lot Size of Minor Infill Lot Subdivision, July 2006 to March 2012



Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Note: Parent lot size refers to the size of the allotment prior to subdivision.

4.2.2 BROADHECTARE & MAJOR INFILL LOT CONSTRUCTION

Broadhectare/Major Infill lot construction activity as measured from July 2006 to March 2012 across the municipal area of Mitchell (outside of the Urban Growth Boundary) averaged 280 lots per annum. This represents 84% of all residential lot construction activity across the municipal area.

Broadhectare lot construction activity was primarily located within the urban areas of Wallan (north), Kilmore and Broadford.

As measured annually from July 2006 to March 2012, the amount of broadhectare lot construction activity has varied significantly. From July 2006 to July 2008 broadhectare/major infill lot production was around 277 lots each year. Lot production declined for the next two years at approximately 215 lots per annum, significantly increasing to 314 lots from July 2010 to March 2012.

As measured to the March Quarter 2012 there have been 317 broadhectare/major infill lots constructed from July 2011 to March 2012.

4.2.3 RURAL RESIDENTIAL LOT CONSTRUCTION

Rural Residential lot construction activity as measured from July 2006 to March 2012 across the municipal area of Mitchell has averaged 14 lots per annum. This represents 4% of all residential lot construction activity across the municipal area.

Of this lot construction activity – 47% was zoned Low Density Residential (LDRZ) and 53% Rural Living (RLZ). The majority of this subdivision activity was located in the suburb of Wandong.

From July 2006 to March 2012 there was an average annual residential lot construction of 334 across the municipality (outside of the Urban Growth Boundary). The majority (84%) were broadhectare/major infill lots, followed by minor infill lot construction at 12% and 4% rural residential.

Over the same period, residential building approval activity for the municipality has averaged 425 per annum, of which the vast majority of building approvals (97%) have been for separate houses.

Analysis of the amount of building approvals and residential lot construction indicates a functioning residential land market across the municipal area of Mitchell.

However, lot construction activity should continue to be monitored to identify any increasing lot production trends and if not, to investigate if there are any impediments to the delivery of allotments in the short-term. This is based on a disparity between lot production and dwelling approval activity.

4.0 RESIDENTIAL LAND SUPPLY

This section of the report details the stock (measured in lots) of residential land across the municipality of Mitchell as at March 2012. Residential lot stock/supply is presented at a suburb, Statistical Local Area (SLA) and municipal level. Residential land supply is further analysed by supply type/location, namely:

- Minor Infill;
- Broadhectare & Major Infill;
- Future Residential; and
- Rural Residential.

For both major infill and broadhectare land supply areas, anticipated lot construction timing is presented. This refers to the likely timing of lot construction, not dwelling construction.

Table 1 details the residential land supply, measured in lots, by supply type across the municipal area of Mitchell as at March 2012. In total (excluding minor infill) there is a residential lot supply of approximately 7,364. This is comprised of:

- 7,157 zoned broadhectare/major infill lots (97% of supply); and
- 207 vacant rural residential lots (3% of supply).

Within the municipality of Mitchell (outside of the Urban Growth Boundary), there are no future residential areas identified.

Each of the supply types are further detailed below, including maps of each of the supply type, including the location of recent residential lot construction activity.

Table 1: Residential Lot Potential by Supply Type, March 2012

SLA/Suburb/LGA	Lots				No Estimated Yield (Area hectares)	
	Broad hectare	Rural Residential	Future (unzoned)	Total Lots	Broad hectare	Future (unzoned)
Mitchell (S) - North	753	34	0	787	45.1	0
Pyalong	0	28	0	28	29.2	0
Seymour (Vic.)	676	6	0	682	10.5	0
Tallarook	77	0	0	77	0	0
Tooborac	0	0	0	0	5.3	0
Mitchell (S) - South	6,404	173	0	6,577	4.8	0
Broadford	624	33	0	657	0	0
Clonbinane	0	4	0	4	0	0
Heathcote Junction	0	17	0	17	0	0
Kilmore	1,544	36	0	1,580	0	0
Kilmore East	0	0	0	0	4.8	0
Wallan (north)	4,236	23	0	4,259	0	0
Wandong	0	51	0	51	0	0
Waterford Park	0	9	0	9	0	0
Mitchell (S)*	7,157	207	0	7,364	49.9	0

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Note: Rural Residential supply refers to vacant (as at 2009) LDRZ and RLZ zoned allotments.

*Only includes land outside of the Urban Growth Boundary.

5.1 MINOR INFILL SUPPLY

A parcel by parcel assessment was undertaken to identify minor infill supply, specifically zoned vacant allotments sized less than one hectare. The assessment is based on the latest aerial imagery of December 2009. The identification of vacant allotments sized less than one hectare does not provide an estimated dwelling yield. Rather it simply identifies the vacant allotment by lot size and location.

Dwelling yields on such allotments can vary significantly, examples range from:

- 800sqm vacant allotment within a broadhectare estate typically would yield one dwelling;
- 800sqm vacant allotment within the urban centre, could typically range from one to four dwellings; and
- 5,000sqm allotment within a township zone (un-sewered) one dwelling versus anything from five plus dwellings within a larger urban settlement.

As at December 2009, there was 757 minor infill lots identified. Of these lots, 573 were sized less than 1,200sqm or 76% of the identified lots. In addition there were:

- 91 vacant lots sized between 1,200 to 2,000sqm;
- 69 lots sized from 2,000sqm to 5,000sqm; and
- 24 lots sized from 5,000 to 10,000sqm.

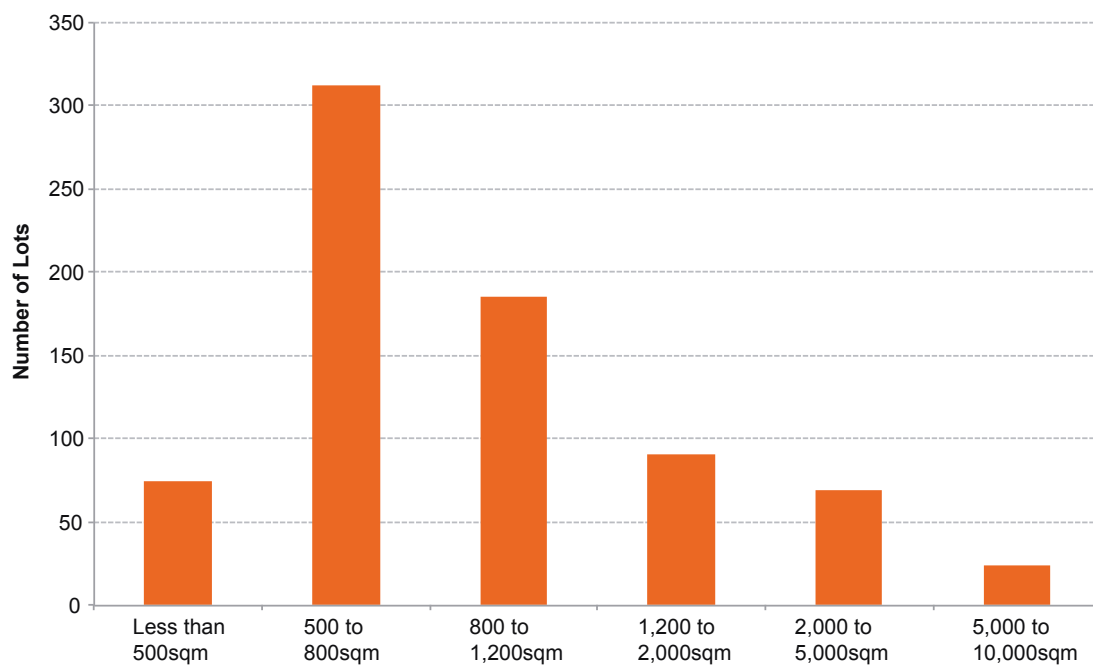
Graph 5 summarises the size distribution of identified minor infill supply.

All of these allotments have potential to yield multiple lots post subdivision. As noted previously 12% of lot construction activity across Mitchell was minor infill, and of this lot construction, 72% was from parent lots sized greater than 1,200sqm.

The majority of minor infill supply is located in the suburbs of:

- Kilmore – 268 lots;
- Wallan (north) – 191 lots;
- Broadford – 173 lots; and
- Seymour – 87 lots.

Graph 5: Minor Infill Supply – Number of Vacant Zoned Residential Allotments, by Lot Size Cohort, 2009



Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

5.2 BROADHECTARE & MAJOR INFILL SUPPLY

As at March 2012, there was a residential lot capacity within broadhectare areas of approximately 9,190, of which 46% (4,236 lots) is located in Wallan (north), 21% (1,953 lots) in Beveridge and 18% (1,624 lots) in Kilmore. Table Two identifies the lot yield and estimated development timing of zoned broadhectare lot stock.

Table 2: Anticipated Lot Construction Activity – Broadhectare/Major Infill, 2012

SLA/LGA	Zoned Lot Potential					Total Zoned Stocks
	1-2 years	3-5 years	6-10 years	11+ years	No Timing ³	
Mitchell (S) - North	0	0	0	0	753	753
Mitchell (S) - South	1,090	1,479	1,855	350	1,630	6,404
Mitchell (S)*	1,090	1,479	1,855	350	2,383	7,157

³The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential development timing.

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012.

* Only includes areas outside of the Urban Growth Boundary.

Broadhectare lot potential represents 97% of the total existing residential land supply across the municipal area of Mitchell.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 514 lots per annum will be constructed within existing zoned broadhectare areas. Over the 6-10 year period 371 lots per annum are anticipated to be constructed, although it is likely that a number of parcels will be constructed during this period where timing could not currently be determined.

There is a broadhectare lot potential of 2,383 lots where no development timing has been allocated, due primarily to uncertainty of the likely development timing. This lot potential is mainly located in Seymour (676 lots, Broadford (603 lots) and Kilmore (545 lots).

NO YIELD

A total 50 hectares of zoned vacant land over one hectare in size has been identified that has the potential for broadhectare subdivision. However, these parcels are typically in low demand areas, zoned Township (TZ) and in many instances un-sewered. Suburbs that have relatively high levels of this land stock form include:

- Pyalong – 29 hectares; and
- Seymour – 10 hectares.

This potential residential land supply source has deliberately been excluded from a lot yield and timing perspective as it is considered unlikely that any significant volume of subdivision activity will occur within the sites.

5.3 FUTURE RESIDENTIAL LAND SUPPLY

Analysis has been undertaken in conjunction with municipal planning officers to identify the location and associated lot yield of future residential land stocks. Future residential land stocks are identified by the Mitchell Shire Council, and contained within various municipal planning policy and strategy planning documents.

Future residential land stocks are not zoned to support immediate 'normal' residential development, and rezoning and structure planning processes are required before normal residential development proceeds.

Locations which face natural hazards (such as fire, flood and landslide) need to be assessed as part of the decision making associated with a proposed rezoning change. Within the municipality of Mitchell (outside of the Urban Growth Boundary), there are no future residential areas currently identified.

5.4 RURAL RESIDENTIAL ALLOTMENTS

The stock of both occupied and vacant rural residential allotments have been determined on a lot by lot basis as at December 2009. A Rural Residential allotment is defined as all allotments that are zoned Low Density Residential (LDRZ) and Rural Living (RLZ). Occupied is defined as evidence of a 'habitable' dwelling and vacant is defined as no evidence of a habitable dwelling via the interpretation of aerial imagery.

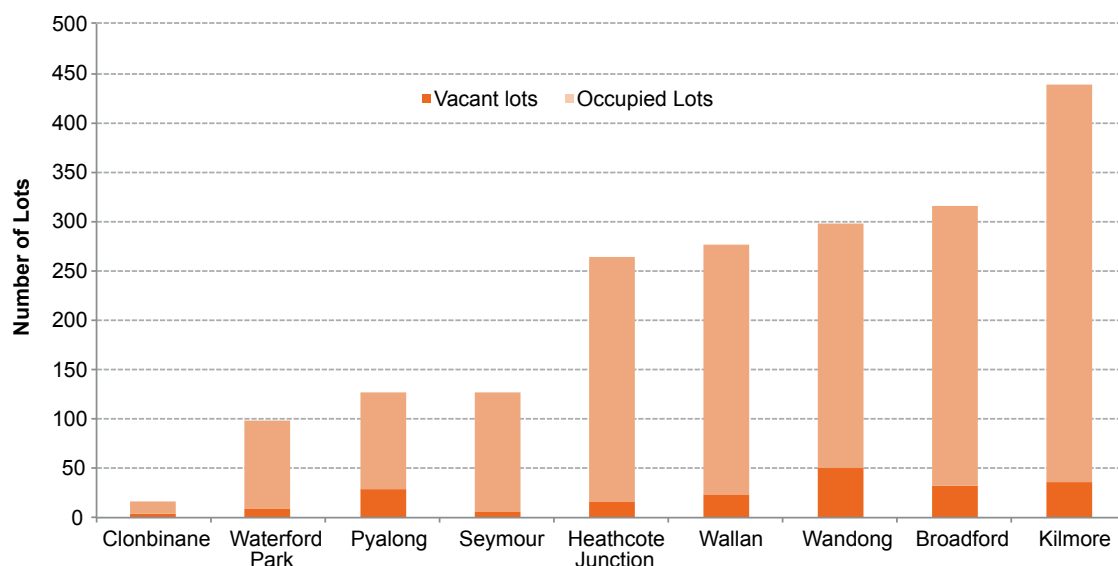
As at December 2009 across the municipality of Mitchell there was a total lot stock of rural residential allotments of 1,961. Of this stock, 207 lots were vacant, a lot vacancy rate of 11%. Graph Six summarises the stock of both occupied and vacant rural residential allotments by suburb.

By zone type, as at December 2009 there were 1,312 Low Density Residential (LDRZ) allotments, of which 75 were vacant across the municipality, a lot vacancy of 6%. In comparison, there were a total of 649 Rural Living (RLZ) zoned allotments, of which 132 were vacant – a lot vacancy rate of 20%.

The location of the majority of rural residential lots across the municipality includes:

- Kilmore - total 439 lots (lot vacancy of 8%);
- Broadford - total 316 lots (lot vacancy of 10%);
- Wandong - total 297 lots (lot vacancy of 17%);
- Wallan (north) - total 276 lots (lot vacancy of 8%); and
- Heathcote - total 264 lots (lot vacancy of 6%).

Graph 6: Stock of Vacant and Occupied 'rural residential' Allotments, 2009



Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

In total (excluding minor infill) there is a residential lot supply of approximately 7,364 for the Shire of Mitchell (outside of the Urban Growth Boundary). This is comprised of:

- 7157 zoned broadhectare/major infill lots (19.9% of supply); and
- 207 vacant rural residential lots (0.4% of supply).

As at December 2009, there was 757 minor infill lots identified. Of these lots, 573 were sized less than 1,200sqm or 76% of the identified lots.

As at March 2012, there was a residential lot capacity within broadhectare areas of approximately 7,157, of which 59% (4,236 lots) is located in Wallan (north), 22% (1,544 lots) in Kilmore and 8% (624 lots) in Broadford.

Within the municipality of Mitchell (outside of the Urban Growth Boundary), there are no future residential areas currently identified.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 514 lots per annum will be constructed within existing zoned broadhectare areas.

As at December 2009 across the municipality of Mitchell there was a total lot stock of rural residential allotments of 1,961. Of this stock, 207 lots were vacant, a lot vacancy rate of 11%.

6.0 PROJECTED DEMAND

This report incorporates the most recently available demand figures to project dwelling requirements and future adequacy of residential land. These figures currently use published population and household projections contained in *Victoria in Future 2012* (VIF2012) undertaken by the (former) Department of Planning and Community Development as the basis for projected dwelling requirements

The projections detail state-wide, regional and metropolitan areas as well as local government areas population, household and dwelling projections that encompass the latest available trends such as changes to levels of immigration or economic conditions, or changes to policy affecting population growth locations and levels, and subsequent demand for housing.

Graph 7 summarises the projected demand for residential dwellings for the municipal area of Mitchell. In addition, it highlights historic 'expressed' demand for residential dwellings in the form of residential building approvals and lot construction.

Note that the population growth numbers and dwelling requirements for Mitchell (S) – South, outside of the Urban Growth Boundary, are estimates based on *Victoria in Future 2012* projections.

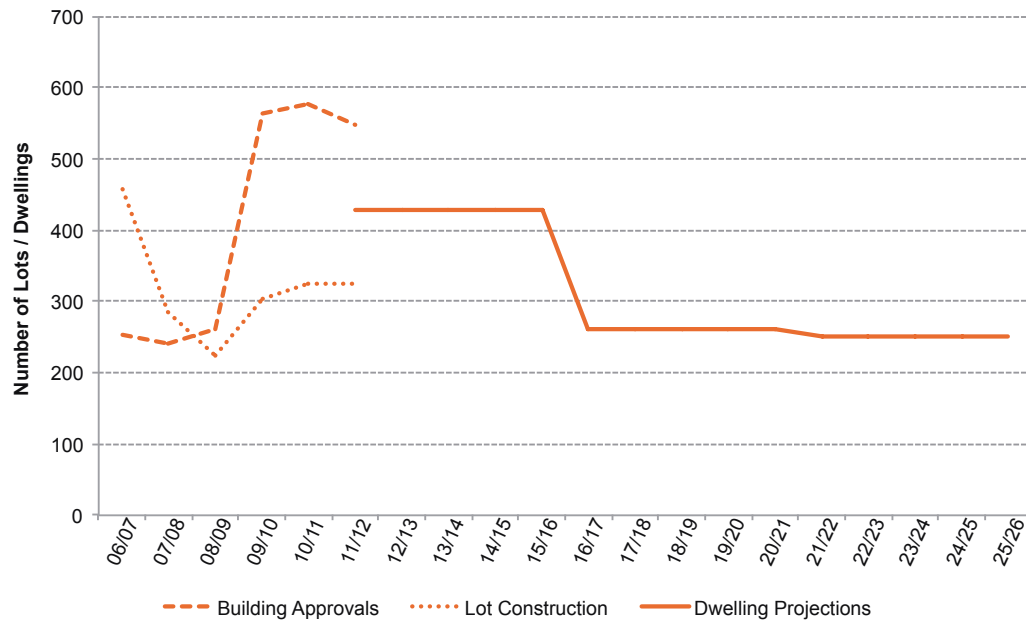
Projected dwelling requirements sourced from VIF 2012 indicate that from 2011 to 2026 there will be a total dwelling requirement of 4,696 (313 average per annum) for the Shire of Mitchell (outside of the Urban Growth Boundary). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 428;
- 2016 to 2021 - 260; and
- 2021 to 2026 - 251.

As measured from 2011 to 2026, the average annual projected demand by SLA within the municipality of Mitchell is:

- North: 26 dwellings per annum (e.g. Pyalong, Seymour); and
- South: 286 dwellings per annum (e.g. Wallan (north), Kilmore, Broadford).

Graph 7: Historic and Projected Demand for Residential Dwellings, 2006 to 2026



Source: [former] DPCD Victoria in Future 2012: Population and Household Projections. Australian Bureau of Statistics, Catalogue No.8731.0, Spatial Economics Pty Ltd

Note that Building Approvals includes all of Mitchell Shire. Lot Construction and Dwelling Projections are for those areas outside of the Urban Growth Boundary

Projected dwelling requirements sourced from the State Governments Population and Household Projections (*Victoria in Future 2012*) indicate that from 2011 to 2026 there will be a total dwelling requirement of 696 (313 average per annum) for the Shire of Mitchell (outside of the Urban Growth Boundary). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 428;
- 2016 to 2021 - 260; and
- 2021 to 2026 - 251.

7.0 YEARS OF SUPPLY – RESIDENTIAL LAND

Analysis has been undertaken to estimate the years of residential land supply by Statistical Local Area. In estimating the years of residential land supply only major infill, zoned broadhectare and future residential land supply types are considered. In assessing the estimated years of supply, the demand component for the above supply types are estimated via the assessment of historic consumption.

The Population and Household Projections 2011-2031 for Victoria, outlined in *Victoria in Future 2012*, are used by the Regional Urban Development Program as the basis for determining projected demand for residential allotments. Demand information is assessed at both a municipal level and by the component Statistical Local Areas (SLAs).

Table 3 summarises the estimated years of supply for major infill and broadhectare stocks combined.

YEARS OF SUPPLY – VICTORIA IN FUTURE 2012 DEMAND

In terms of zoned broadhectare and major infill residential land stocks it is estimated based on the identified supply and projected demand for the Shire of Mitchell (outside of the Urban Growth Boundary), there are sufficient land stocks to satisfy 15+ years of future demand.

Zoned broadhectare and major infill supply by SLA is sufficient to satisfy:

- 15+ years: Mitchell (S) - North SLA; and
- 15+ years: Mitchell (S) - South SLA (outside of Urban Growth Boundary).

In terms of future residential land supply stocks, there is no future identified residential stock within the Mitchell (S) - North SLA (Pyalong, Seymour, Tallarook and Toobarac), or in Mitchell (S) - South SLA (outside of the Urban Growth Boundary).

Table 3: Estimated Years of Residential Broadhectare and Major Infill Land Supply, 2012

SLA/LGA	VIF2012 Projections		
	Zoned Stocks	Future Stocks	Total Stocks
Mitchell (S) - North	15+	0	15+
Mitchell (S) - South*	15+	0	15+
Mitchell (S)	15+	0	15+

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

* only includes areas outside of the Urban Growth Boundary

8.0 RESIDENTIAL TABLES

Table 4: Minor Infill Lot Construction Activity, July 2006 to March 2012

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ⁴	Average Lot Production
Mitchell (S) - North	24	5	6	13	0	1	9
Pyalong	4	3	0	2	0	0	2
Seymour (Vic.)	20	2	4	10	0	1	6
Tallarook	0	0	0	1	0	0	0
Tooborac	0	0	2	0	0	0	0
Mitchell (S) - South	47	55	24	40	14	7	33
Beveridge	0	4	2	0	0	0	1
Broadford	11	4	4	15	0	1	6
Kilmore	31	13	12	13	11	5	15
Kilmore East	0	3	0	0	0	1	1
Wallan (north)	5	31	5	12	3	0	10
Wandong	0	0	1	0	0	0	0
Mitchell (S)	71	60	30	53	14	8	41

⁴ From July 2011 to March 2012

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 5: Parent Lot Size of Minor Infill Lot Construction, July 2006 to March 2012

SLA/Suburb/LGA	Less than 500sqm	500 to 800sqm	800 to 1,200sqm	1,200 to 2,000sqm	2,000 to 5,000sqm	5,000 to 10,000sqm
Mitchell (S) - North	0	2	6	6	17	18
Pyalong	0	0	0	0	3	6
Seymour (Vic.)	0	2	6	6	14	9
Tallarook	0	0	0	0	0	1
Tooborac	0	0	0	0	0	2
Mitchell (S) - South	0	22	36	40	69	20
Beveridge	0	0	0	0	0	6
Broadford	0	2	15	6	10	2
Kilmore	0	11	10	18	42	4
Kilmore East	0	0	0	0	0	4
Wallan (north)	0	9	11	15	17	4
Wandong	0	0	0	1	0	0
Mitchell (S)	0	24	42	46	86	38

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 6: Broadhectare/Major Lot Construction Activity, July 2006 to March 2012

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ⁴	Average Lot Production
Mitchell (S) - North	0	0	0	0	0	0	0
Pyalong	0	0	0	0	0	0	0
Seymour (Vic.)	0	0	0	0	0	0	0
Tallarook	0	0	0	0	0	0	0
Tooborac	0	0	0	0	0	0	0
Mitchell (S) - South	330	224	188	242	311	317	280
Broadford	103	48	0	10	24	0	32
Kilmore	88	134	12	86	33	80	75
Kilmore East	0	0	0	0	9	0	2
Wallan (north)	139	42	176	146	245	237	171
Mitchell (S)	330	224	188	242	311	317	280

⁴ From July 2011 to March 2012

Note: Broadhectare/Major lot construction refers to residential projects yielding 10 or more lots.

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 7: Low Density Residential Lot Construction Activity, July 2006 to March 2012

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ⁴
Mitchell (S) - South	25	2	7	2	1	0
Broadford	0	0	0	1	0	0
Heathcote Junction	10	0	5	0	0	0
Kilmore	1	1	1	1	1	0
Wandong	14	1	1	0	0	0
Mitchell (S)	25	2	7	2	1	0

⁴ From July 2011 to March 2012

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 8: Rural Living Lot Construction Activity, July 2006 to March 2012

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12 ⁴
Mitchell (S) - North	1	0	0	0	0	0
Pyalong	1	0	0	0	0	0
Mitchell (S) - South	31	2	1	6	0	0
Broadford	2	2	1	0	0	0
Clonbinane	4	0	0	0	0	0
Kilmore	0	0	0	6	0	0
Wandong	25	0	0	0	0	0
Mitchell (S)	32	2	1	6	0	0

⁴ From July 2011 to March 2012

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 9: Minor Infill (vacant lots) Supply by Lot Size Cohort, Dec 2009

SLA/Suburb/LGA	Less than 500sqm	500 to 800sqm	800 to 1,200sqm	1,200 to 2,000sqm	2,000 to 5,000sqm	5,000 to 10,000sqm	Total Lots
Mitchell (S) - North	1	30	35	16	22	12	116
Pyalong	0	0	0	1	8	6	15
Seymour (Vic.)	1	30	34	14	6	2	87
Tallarook	0	0	1	1	7	0	9
Tooborac	0	0	0	0	1	4	5
Mitchell (S) - South	74	282	151	75	47	12	641
Broadford	1	88	50	25	7	2	173
Kilmore	65	80	60	32	28	3	268
Kilmore East	0	0	0	0	1	1	2
Wallan (north)	8	114	39	15	9	6	191
Wandong	0	0	2	3	2	0	7
Mitchell (S)	75	312	186	91	69	24	757

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 10: Broadhectare/Major Infill Lot Potential and Anticipated Development Timing (lots), 2012

SLA/LGA	Zoned Lot Potential					Total Zoned Stocks
	1-2 years	3-5 years	6-10 years	11+ years	No Timing ⁵	
Mitchell (S) - North	0	0	0	0	753	753
Pyalong	0	0	0	0	0	0
Seymour (Vic.)	0	0	0	0	676	676
Tallarook	0	0	0	0	77	77
Tooborac	0	0	0	0	0	0
Mitchell (S) - South	1,090	1,479	1,858	350	1,630	6,404
Broadford	21	0	0	0	603	624
Kilmore	307	257	435	0	545	1,544
Kilmore East	0	0	0	0	0	0
Wallan (north)	762	1,222	1,420	350	482	4,236
Mitchell (S)	1,090	1,479	1,855	350	2,383	7,157

⁵ The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential development timing.

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 11: Broadhectare/Major Infill Stocks – No Timing or Yield, 2012

SLA/Suburb/LGA	Area (ha)	No. of Lots
Mitchell (S) - North	45.1	6
Pyalong	29.2	3
Seymour (Vic.)	10.5	2
Tooborac	5.3	1
Mitchell (S) - South	4.8	1
Kilmore East	4.8	1
Mitchell (S)	49.9	7

Note: The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential yield and development timing. This potential is primarily is located in low demand areas where there has been historically minimal to no subdivision activity.

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 12: Occupied and Vacant Rural Residential Lot Stock by Zone Type, 2009

SLA/Suburb/LGA	LDRZ				RLZ			
	Vacant	Occupied	Vacancy Rate (%)	Total Lots	Vacant	Occupied	Vacancy Rate (%)	Total Lots
Mitchell (S) - North	4	121	3%	125	30	98	23%	128
Pyalong	0	0	0%	0	28	98	22%	126
Seymour (Vic.)	4	121	3%	125	2	0	100%	2
Mitchell (S) - South	71	1116	6%	1187	102	419	20%	521
Broadford	4	110	4%	114	29	173	14%	202
Clonbinane	0	1	0%	1	4	12	25%	16
Heathcote Junction	17	247	6%	264	0	0	0%	0
Kilmore	7	245	3%	252	29	158	16%	187
Wallan (north)	23	253	8%	276	0	0	0%	0
Wandong	11	170	6%	181	40	76	34%	116
Waterford Park	9	90	9%	99	0	0	0%	0
Mitchell (S)	75	1237	6%	1312	132	517	20%	649

Source: Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2012

Table 13(a): Estimated and Projected Population, 2011 to 2026

SLA/LGA	Estimated Resident Population			
	2011	2016	2021	2026
Mitchell (S) - North	11,314	11,402	11,460	11,440
Mitchell (S) - South*	24,081	28,333	31,043	32,757
Mitchell	35,395	39,735	42,503	44,197

Source: (former) Department of Planning and Community Development Victoria in Future 2012

* only includes areas outside of the Urban Growth Boundary. Population growth numbers and dwelling requirements for Mitchell (S) – South, outside of the Urban Growth Boundary, are estimates based on Victoria in Future 2012 projections.

Table 13(b): Estimated and Projected Number of Dwellings, 2011 to 2026

SLA/LGA	Structural Private Dwellings			
	2011	2016	2021	2026
Mitchell (S) - North	4,995	5,145	5,295	5,394
Mitchell (S) - South*	8,421	10,412	11,565	12,718
Mitchell	13,416	15,557	16,860	18,112

Source: (former) Department of Planning and Community Development Victoria in Future 2012

* only includes areas outside of the Urban Growth Boundary. Population growth numbers and dwelling requirements for Mitchell (S) – South, outside of the Urban Growth Boundary, are estimates based on Victoria in Future 2012 projections.

Table 13(c): Projected Average Annual Change in the Number of Persons and Dwellings, 2011 to 2026

SLA/LGA	Estimated Resident Population				Structural Private Dwellings			
	2011 to 2016	2016 to 2021	2021 to 2026	2011 to 2026	2011 to 2016	2016 to 2021	2021 to 2026	2011 to 2026
Mitchell (S) - North	18	12	-4	8	30	29	20	27
Mitchell (S) - South*	850	542	343	578	398	231	231	286
Mitchell	868	554	339	587	428	260	251	313

Source: (former) Department of Planning and Community Development Victoria in Future 2012

* only includes areas outside of the Urban Growth Boundary. Population growth numbers and dwelling requirements for Mitchell (S) – South, outside of the Urban Growth Boundary, are estimates based on Victoria in Future 2012 projections.

LOCATION OF SUBURBS AND STATISTICAL LOCAL AREAS – MITCHELL



GLOSSARY OF TERMS

BROADHECTARE LAND

Undeveloped land generally located on the urban fringe, zoned for residential development (no previous urban development activity), and the parent lot greater than 1ha.

CONSTRUCTED LOT

For the purposes of the UDP, a lot is created when land has been subdivided ('constructed') whether or not a separate title has been issued.

DWELLING

A building used as a self-contained residence, may include house, apartment, student accommodation, retirement or aged care facilities or a mobile dwelling such as a caravan.

FUTURE RESIDENTIAL LAND

Land identified by the relevant municipal authority for future residential development and current zoning not supportive of 'normal' residential development. Land which has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.

FUTURE RURAL RESIDENTIAL LAND

Land identified by the relevant municipal authority for future rural residential development and current zoning not supportive of such residential development. This includes both future zone types of Low Density Residential (LDRZ) and Rural Living (RLZ).

LOCAL GOVERNMENT AREA (LGA)

A geographical area that is administered by a local council.

LOT

For the purposes of the UDP, a lot is created when land has been subdivided ('constructed') whether or not a separate title has been issued.

MAPSONLINE

An interactive online program that gives users the ability to search for specific projects, generate reports, and print or download maps and statistical reports. It also allows the user to search for specific land supply areas by region or LGA, estate name, Melway reference, street address or lot number, and contains mapping and statistical information sourced through the UDP. Registered users can also make site-specific feedback on-line.

MINOR INFILL

Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot less one hectare.

RURAL RESIDENTIAL LAND

Land zoned Low Density Residential (LDRZ) or Rural Living (RLZ).

PRECINCT STRUCTURE PLANS

In the Urban Growth Zone (UGZ), the precinct structure plan (PSP) is the key document that triggers the conversion of non-urban land into urban land. A precinct structure plan is a long-term strategic plan that describes how a precinct or a series of sites will be developed.

SUBURB (AUSTRALIAN BUREAU OF STATISTICS)

This is a census-specific area where Collection Districts are aggregated to approximate suburbs.

STATISTICAL LOCAL AREA (SLA)

A geographical area created by the Australian Bureau of Statistics for statistical purposes. Victoria is divided into 200 SLAs. SLAs may be the same as an LGA or in most cases several SLAs aggregate to form LGAs.

