Urban Development Program

2011

Regional Residential Report

City of Greater Shepparton

State Government Victoria
Department of Planning and Community Development

ACKNOWLEDGEMENTS

This Urban Development Program was undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Planning and Community Development.

The Urban Development Program (Greater Shepparton) would not have been possible if it were not for the invaluable contribution made by staff from the City of Greater Shepparton and the Department of Planning and Community Development's Hume Regional Office.

Published by the Urban Development Program
Department of Planning and Community Development
1 Spring Street Melbourne Victoria 3000
Telephone (03) 9208 3799

September, 2012

Authorised by Matthew Guy, 1 Spring Street Melbourne Victoria 3000.

Accessibility

If you would like to receive this publication in an accessible format, please telephone (03) 9223 1783 or email urbandevelopment.program@dpcd.vic.gov.au. This publication is also published in PDF and Word formats on www.dpcd.vic.gov.au.

CONTENTS

LIST OF TABLES

LIST OF GRAPHS

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. This round of land supply assessments is for the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura. This report provides information on residential supply and demand for the City of Greater Shepparton.

The following residential land supply assessment was undertaken by Spatial Economics Pty Ltd and commissioned by the Department of Planning and Community Development in conjunction with the City of Greater Shepparton.

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

RECENT ACTIVITY

From 2005-06 to 2010-11 residential building approval activity within the municipality of Greater Shepparton has averaged 420 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. However, approvals peaked at 565 in 2009-10 and troughed at 334 in 2008-09.

The majority of building approvals (93%) since 2005-06 have been separate houses, 6% semi-detached dwellings and 1% units/apartments.

Total residential lot construction for the period 2005-06 to 2010-11 averaged 434 per annum. Residential lot construction was the lowest in 2008-09 at 266 lots and 'peaked' in 2009-10 at 762 lots. The majority (86%) were broadhectare lots, 12% were Minor Infill, 1% Major Infill and 1% Non Urban.

The location by suburb of significant volumes of lot production includes:

- Shepparton (54% of activity or 233 lots per annum);
- Kialla (22% of activity or 94 lots per annum);
- Shepparton North (10% of activity or 42 lots per annum); and
- Mooroopna (9% of activity or 38 lots per annum).

PROJECTED DEMAND

Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2026 a total of 6,450 additional dwellings (or on average 430 per annum) will be required to house the projected population for the City of Greater Shepparton.

As measured from 2011 to 2026, the average annual projected demand by Statistical Local Area (SLA) within the municipality of Greater Shepparton is:

- Part A: 392 dwellings per annum (e.g. Shepparton, Mooroopna and Kialla);
- Part B West: 10 dwellings per annum (e.g. Tatura, Byrnside and Murchison); and
- Part B East: 28 dwellings per annum (e.g. Kialla West, Dookie and Pine Lodge).

IDENTIFIED RESIDENTIAL LAND SUPPLY

In total there is a residential lot supply of approximately 11,525. This is comprised of:

- 3,863 zoned broadhectare lots (34% of supply);
- 103 major infill lots (less than 1% of supply);
- 125 vacant non urban residential lots (1% of supply); and
- 7,434 designated future residential lots (65% of supply).

The 3,863 broadhectare lot potential is distributed within the following suburbs:

- 37% (1,447 lots) – Kialla;
- 23% (890 lots) – Shepparton;
- 15% (595 lots) – Shepparton North;
- 11% (441 lots) – Tatura; and
- 11% (424 lots) – Mooroopna.

It is estimated that over the next five years an average 348 lots per annum will be constructed within existing zoned broadhectare areas, since 2005-06 – 373 broadhectare lots per annum were constructed.

In total there is an estimated lot potential within Future Residential areas of approximately 7,434. Of this lot potential:

- 5,545 lots are located in Shepparton;
- 1,310 lots in Mooroopna;
- 300 in Shepparton North;
- 141 in Tatura East; and
- 138 in Tatura.

YEARS OF RESIDENTIAL LAND SUPPLY

It is estimated, based on the identified supply and *Victoria in Future 2012* demand projections, there is **over 15 years** total supply of residential land stocks across the Greater Shepparton municipality.

In terms of zoned residential land stocks, there are sufficient land stocks to satisfy **10 years** of future demand. This is based on a zoned lot potential of 3,966 lots, of which:

- 3,863 lots are broadhectare, and
- 103 lots are major infill

In terms of future (unzoned) residential land supply stocks, there is sufficient land to satisfy **over 15 years** of projected demand.

MINOR INFILL LOT SUPPLY

In addition, the minor infill lot supply of 1,112 lots also constitutes around **2.5 years** of vacant land.

POTENTIAL LOT CONSTRUCTION ACTIVITY

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 366 lots per annum are anticipated to be constructed within existing zoned broadhectare and major infill areas across the municipality.

This rate of anticipated lot construction is similar to the rates of recent lot construction; therefore the level of anticipated construction is likely to be achieved. Based on anticipated lot construction activity over the next five years 47% of the zoned residential broadhectare and major infill stock will be consumed.

Conclusion and Current Actions

In summary there is an adequate stock of total residential land to meet Victoria in Future and trend based consumption rates across the City of Greater Shepparton. Consumption of residential land, however, should continue to be monitored to ensure there are sufficient land stocks to meet future demand.

Based on *Victoria in Future 2012* projections, the City of Greater Shepparton currently has around 10 years supply of zoned residential land stocks across the municipality.

In terms of 'future' or unzoned land stocks, there are sufficient stocks to satisfy an additional 15+ years of additional demand.

In May 2011, the Greater Shepparton City Council adopted an updated 'Greater Shepparton Housing Strategy'. This purpose of this study is to guide the future long term identification and provision of residential land within the municipality.

1.0 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 2009-10, the Urban Development Program was expanded across key provincial areas across regional Victoria. Initially, this included the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga. The next round of completed land supply assessments include the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura.

In addition, land supply assessments for the following municipalities are near completion, these include: Mount Alexander, Mitchell, Macedon, Moorabool, Baw Baw, Bass Coast, South Gippsland, Moyne, Murrindindi, Colac-Otway and Golden Plains.

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 on the growth and investment in these key areas across regional Victoria.

The industrial and residential land supply assessments for the municipalities of Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura were undertaken by Spatial Economics Pty Ltd, and commissioned by the Department of Planning and Community Development in conjunction with the associated councils.

These areas form the initial expansion of the Urban Development Program across regional Victoria. Other areas will be incorporated into the Urban Development Program in the future.

1.3 URBAN DEVELOPMENT PROGRAM REPORTS 2011

The Urban Development Program Reports 2011 for Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura, as well as the Urban Development Program Report 2011 for metropolitan Melbourne, 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 Planning and Community Development at urbandevelopment.program@dpcd.vic.gov.au

2.0 APPROACH AND 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 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 where the current zoning is not supportive of 'normal' residential development Land which has an 'Urban Growth Zone' applied, but where a precinct structure plan has not yet been approved, falls into this category.

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

RESIDENTIAL LOT CONSTRUCTION

Residential lot construction has been determined via the processes established within the State Government's 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 issue 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 and existing studies such as structure plans and municipal strategic statements.

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 five broad time periods, namely:

- 1 to 2 years (2011-12 to 2012-13)
- 3 to 5 years (2013-14 to 2015-16)
- 6 to 10 years (2016-17 to 2020/21)
- 11 years or more (2021 and beyond)
- 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.

NON URBAN

Non Urban 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) are 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 municipality. 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.

Projected demand for the Greater Shepparton residential land supply assessment utilises the dwelling requirements contained within DPCD's *Victoria in Future 2012*.

The projections are discounted by the historic average of total broadhectare and major infill lot construction relative to total residential lot construction activity.

3.0 OVERVIEW

The municipality of Greater Shepparton is made up of the main urban centres of Shepparton, Mooroopna and Tatura and small towns and settlements.

Shepparton serves as a major service centre for the Goulburn Valley and southern Riverina area of New South Wales (NSW) providing a role as the major employment, education and health centre, and cultural and recreational amenity.

Greater Shepparton is a major fruit and vegetable processing centre and also contains large dairy processing facilities providing products for both local consumption and export. Irrigation is critical to agricultural production and manufacturing in the region.

The Goulburn Valley is often referred to as the Food Bowl of Australia with around 25 per cent of the total value of Victoria's agricultural production generated in this area.

Greater Shepparton is known as regional Victoria's largest truck sales and service centre and is recognised as an important transport hub in national supply chains.

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

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

Urban Shepparton is represented by Greater Shepparton Part A Statistical Local Area.

4.0 RECENT ACTIVITY

This section of the report details the recent activity of residential lot construction and dwelling approvals across the municipality of Greater Shepparton. Residential lot construction activity is detailed from 2005-06 to 2010-11 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;
- Major Infill;
- Broadhectare; and
- Non Urban.

4.1 RESIDENTIAL BUILDING APPROVALS

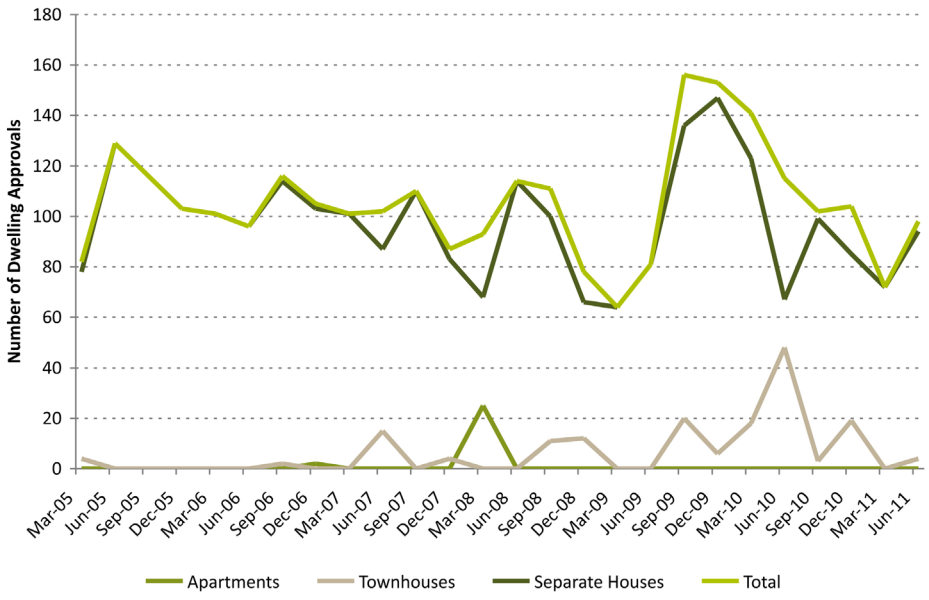
As measured from 2005-06 to 2010-11 residential building approval activity within the municipal area of Shepparton has averaged 420 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. However, approvals peaked at 565 in 2009-10 and troughed at 334 in 2008-09.

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

The vast majority of building approvals (93%) since 2005/06 have been separate houses, 6% semi-detached dwellings and 1% units/apartments.

The majority (91% or 378 per annum) of building approval activity since 2005/06 has been located within the Statistical Local Area (SLA) of Shepparton – Part A, which includes the suburbs of Shepparton, Mooroopna and Kialla.

Graph 1: Number of Quarterly Residential Building Approvals by Type, 2005-06 to 2010-11



Note: Includes – broadhectare, major infill, minor infill and non-urban lot construction.

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 2005-06 to 2010-11. 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 Greater Shepparton. From 2005-06 to 2010-11 there was an average annual residential lot construction of 434. The majority (86%) were broadhectare lots, 12% were minor infill, 1% major infill and 1% non urban.

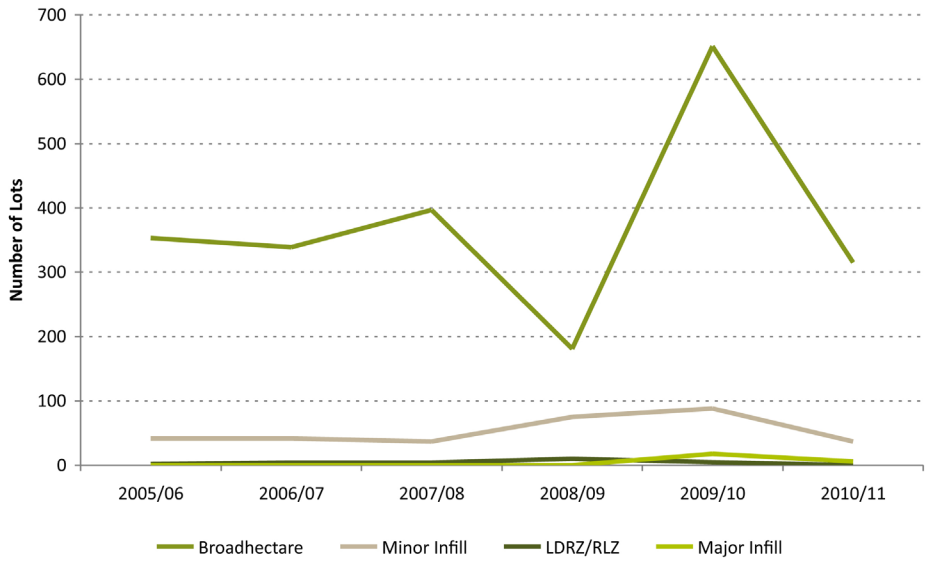
In comparison to the annual volume of residential building approvals, residential lot construction varies considerably. Residential lot construction was the lowest in 2008-09 at 266 lots and 'peaked' in 2009-10 at 762 lots. The lot construction variance over-time is a typical trend in the land development industry and indicates no significant supply or policy issues.

Graph 3 illustrates the average annual volume of all residential lot production by suburb. The location by suburb of significant volumes of lot production includes:

- Shepparton (54% of activity or 233 lots per annum);
- Kialla (22% of activity or 94 lots per annum);
- Shepparton North (10% of activity or 42 lots per annum); and
- Mooroopna (9% of activity or 38 lots per annum).

Lot construction and residential building approval activity as measured from 2005-06 to 2010-11 broadly aligns in terms of the identified volume at 434 and 420 respectively per annum.

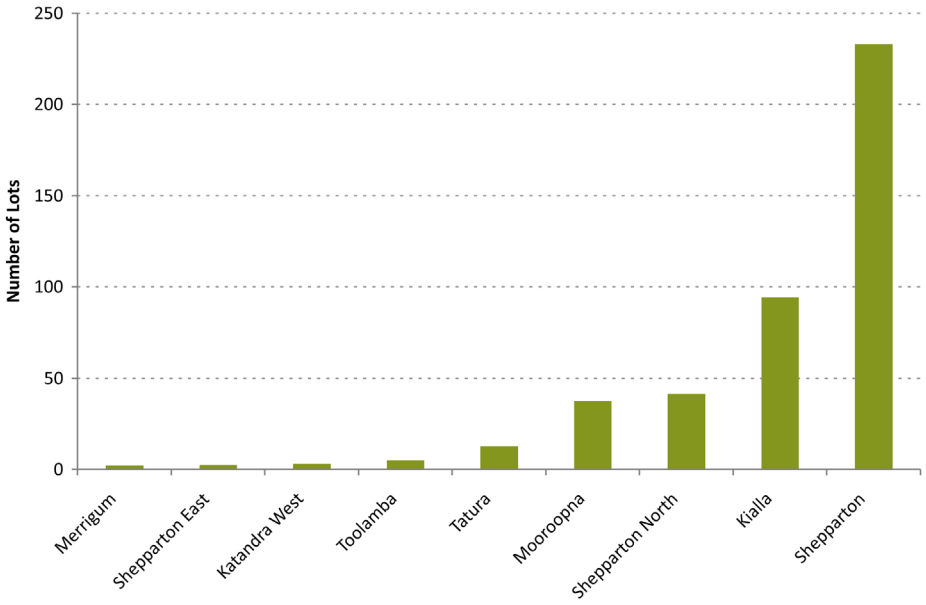
Graph 2: Number of Residential Lots Constructed by Supply Type, 2005-06 to 2010-11



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

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Graph 3: Average Annual Number of Residential Lots Constructed by Suburb, 2005-06 to 2010-11



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

4.2.1 MINOR INFILL LOT CONSTRUCTION

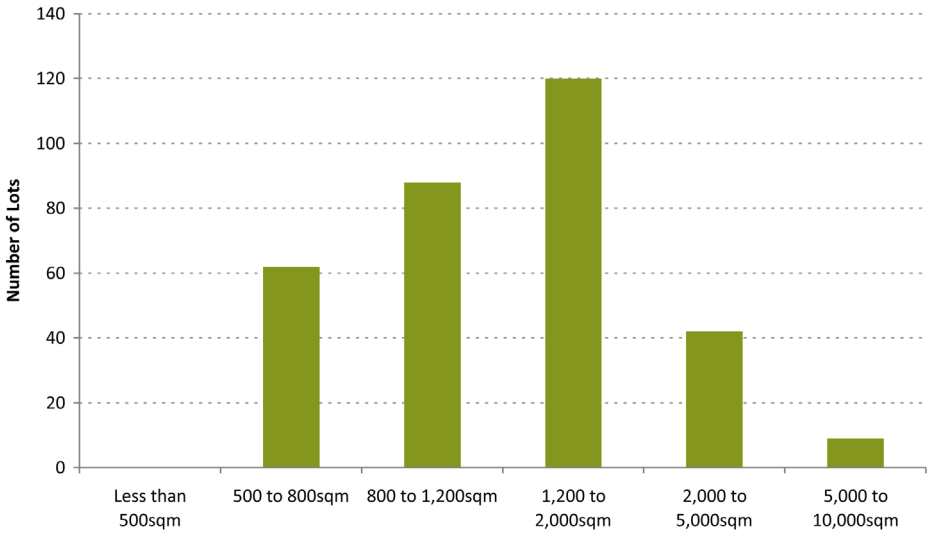
Minor infill lot construction activity as measured from 2005-06 to 2010-11 across the municipality of Greater Shepparton averaged 54 lots per annum. This represents 12% of all residential lot construction activity across the municipality.

Minor infill lot construction activity was concentrated within the established urban area of Greater Shepparton. There was negligible minor infill activity within the suburbs of Kialla and Tatura.

As measured annually from 2005-06 to 2010-11, the amount of minor infill lot construction activity has varied significantly. From 2005-06 to 2007-09, minor infill lot construction averaged around 40, the following year activity increased to 75, increasing to 88 in 2009-10. In 2010-11 there were 37 minor infill lots constructed.

Of the 321 minor infill lots constructed 47% were constructed on 'parent' lots sized less than 1,200sqm, there were no lots constructed on 'parent lots less than 500sqm. There were 120 lots constructed (37%) on parent lots sized from 1,200 to 2,000sqm. 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, 2005-06 to 2010-11



Note: Non-urban supply refers to vacant (as at 2009) LDRZ and RLZ zoned allotments.

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

4.2.2 MAJOR INFILL LOT CONSTRUCTION

Major infill lot construction activity as measured from 2005-06 to 2010-11 across the municipality of Greater Shepparton averaged 4 lots per annum. This represents only 1% of all residential lot construction activity across the municipality. All major infill lot construction was located within the suburb of Shepparton.

The only major infill lot construction activity occurred in 2009-10 (19 lots) and in 2010-11 with six lots.

4.2.3 BROADHECTARE LOT CONSTRUCTION

Broadhectare lot construction activity as measured from 2005-06 to 2010-11 across the municipality of Greater Shepparton averaged 373 lots per annum. This represents 86% of all residential lot construction activity across the municipality.

Broadhectare lot production was dispersed amongst a number of suburbs these include:

- Shepparton (52% of activity or an average of 193 lots per annum);
- Kialla (23% of activity or an average of 87 lots per annum);
- Shepparton North (11% of activity or an average of 39 lots per annum); and
- Mooroopna (9% of activity or an average of 34 lots per annum).

As measured annually from 2005-06 to 2010-11, the amount of broadhectare lot construction activity has varied significantly. In 2008-09 there was approximately 181 broadhectare lots constructed increasing to 651 lots in 2009-10. Since then lot production has declined to 315 in 2010-11, close to the recent average.

4.2.4 NON URBAN ALLOTMENTS

Non urban lot construction activity as measured from 2005-06 to 2010-11 across the municipality of Greater Shepparton has averaged 4 lots per annum. This represents 1% of all residential lot construction activity across the municipality.

Of this lot construction activity all was zoned Low Density Residential (LDRZ). The majority of this subdivision activity was located in the suburbs of Shepparton North and to a lesser degree Tatura.

There was no lot construction activity identified on Rural Living Zoned land during this period.

From 2005-06 to 2010-11 there was an average annual residential lot construction of 434. The majority (86%) were broadhectare lots, 12% were minor infill, 1% major infill and 1% non urban.

As measured from 2005-06 to 2010-11 residential building approval activity within the municipality of Greater Shepparton has averaged 420 per annum. The vast majority of building approvals (93%) since 2005/06 have been separate houses, 6% semi-detached dwellings and 1% units/apartments.

Analysis of the amount of building approvals and residential lot construction indicates a functioning residential land market within Greater Shepparton.

5.0 RESIDENTIAL LAND SUPPLY

This section of the report details the stock (measured in lots) of residential land across the municipality of Greater Shepparton as at July 2011. 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; Non Urban.

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 potential lot yields, by supply type across the municipality of Greater Shepparton as at July 2011. In total (excluding minor infill) there is a residential lot supply of approximately 11,525. This is comprised of:

- 3,863 zoned broadhectare lots (34% of supply);
- 103 major infill lots (less than 1% of supply);
- 125 vacant non urban residential lots (1% of supply); and
- 7,434 designated future residential lots (65% of supply).

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, 2011

SLA/Suburb/LGA	Broad Hectare	Future Residential (Unzoned)	Major Infill	Non Urban	Total
Gr. Shepparton (C) – Pt A	**3,373**	**7,155**	**51**	**70**	**10,649**
Congupna	0	0	0	6	**6**
Grahamvale	0	0	0	1	**1**
Kialla	1,447	0	0	25	**1,472**
Mooroopna	424	1,310	0	1	**1,735**
Orrvale	0	0	0	2	**2**
Shepparton	890	5,545	51	1	**6,487**
Shepparton East	17	0	0	2	**19**
Shepparton North	595	300	0	16	**911**
Toolamba	0	0	0	16	**16**
Gr. Shepparton (C) – Pt B East	**49**	**0**	**6**	**11**	**66**
Dookie	17	0	0	0	**17**
Katandra West	0	0	6	0	**6**
Kialla West	0	0	0	11	**11**
Tallygaroopna	32	0	0	0	**32**
Gr. Shepparton (C) – Pt B West	**441**	**279**	**46**	**44**	**810**
Murchison East	0	0	0	2	**2**
Murchison	0	0	6	0	**6**
Tatura	441	138	40	40	**659**
Tatura East	0	141	0	0	**141**
Toolamba	0	0	0	2	**2**
Greater Shepparton LGA	**3,863**	**7,434**	**103**	**125**	**11,525**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

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/January 2010. 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 compared with anything from five plus dwellings within a larger urban settlement.

As at December 2009, there was 1,112 minor infill lots identified. Of these lots, 856 were sized less than 1,200sqm or 77% of the identified lots. In addition there were:

- 129 vacant lots sized between 1,200sqm to 2,000sqm;
- 97 lots sized from 2,000sqm to 5,000sqm; and
- 30 lots sized from 5,000sqm to 10,000sqm.

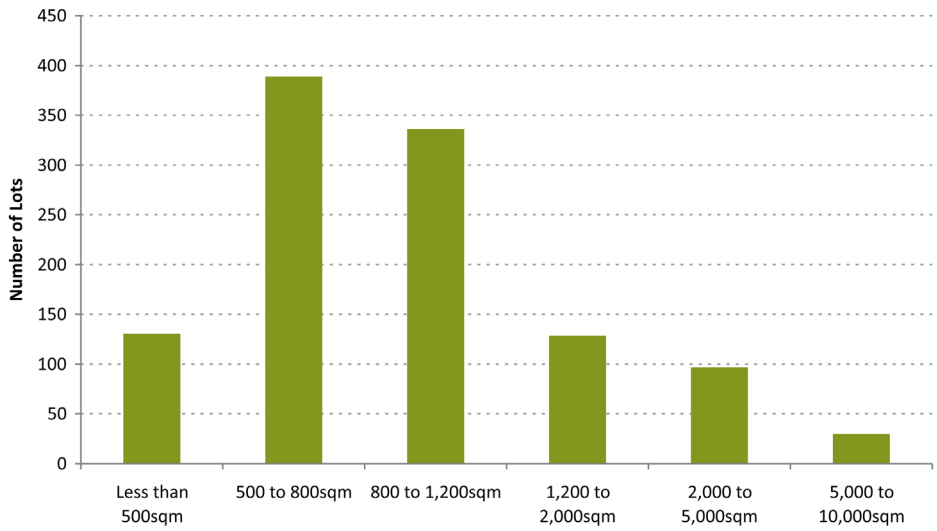
Graph 5 summarises the size distribution of identified minor infill supply.

All of these allotments have potential to yield multiple lots post subdivision. As noted previously 12% of lot construction activity across Greater Shepparton was minor infill, and of this lot construction, 47% was from parent lots sized 1,200sqm or less.

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

- Shepparton – 491 lots;
- Kialla – 295 lots;
- Tatura – 97 lots; and
- Mooroopna – 67 lots.

Graph 5: Minor Infill Supply – Number of Vacant Zoned Residential Allotments, by Lot Size Cohort, 2011



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

5.2 MAJOR INFILL SUPPLY

As at July 2011, there was a residential lot capacity within major infill sites of approximately 103. Of this supply potential 51 lots are located in Shepparton and 40 lots in Tatura. Construction of this lot potential is not expected to commence within the next two years.

Table 2: Anticipated Lot Construction Activity – Major Infill, 2011

SLA/LGA	Development Timing (lots/dwellings)				Total Lot/ Dwelling Potential
	1-2 years	3-5 years	6-10 years	11+ years	
Gr. Shepparton (C) – Pt A	0	51	0	0	**51**
Gr. Shepparton (C) – Pt B East	0	0	6	0	**6**
Gr. Shepparton (C) – Pt B West	0	40	6	0	**46**
Shepparton LGA	**0**	**91**	**12**	**0**	**103**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

5.3 BROADHECTARE SUPPLY

As at July 2011, there was a residential lot capacity within broadhectare areas of approximately 3,863, of which the supply potential is distributed mainly in the following suburbs:

- 37% (1,447 lots) – Kialla;
- 23% (890 lots) – Shepparton;
- 15% (595 lots) – Shepparton North;
- 11% (441 lots) – Tatura; and
- 11% (424 lots) – Mooroopna.

Table 3 identifies the lot yield and estimated development timing of zoned broadhectare lot stock.

Table 3: Anticipated Lot Construction Activity – Broadhectare, 2011

SLA/LGA	Development Timing (lots)				Total Zoned Stocks
	1-2 years	3-5 years	6-10 years	11+ years	
Gr. Shepparton (C) – Pt A	651	885	1,698	139	**3,373**
Gr. Shepparton (C) – Pt B East	0	0	0	49	**49**
Gr. Shepparton (C) – Pt B West	0	203	28	210	**441**
Shepparton LGA	**651**	**1,088**	**1,726**	**398**	**3,863**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Broadhectare lot potential represents 34% of the total existing zoned residential land supply across the municipality of Greater Shepparton.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 348 lots per annum will be constructed within existing zoned broadhectare areas. This closely correlates to recent historical averages of broadhectare lot production at 373 lots per annum.

Over the 6-10 year period it is anticipated that approximately 345 lots per annum will be constructed. Post ten years, the existing stock of zoned broadhectare land supply will largely be depleted.

5.4 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 Greater Shepparton City 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 Greater Shepparton, there is an estimated lot potential within Future Residential areas of approximately 7,434. Of this lot potential:

- 5,545 lots are located in Shepparton;
- 1,310 lots in Mooroopna;
- 300 in Shepparton North;
- 141 in Tatura East; and
- 138 in Tatura.

5.5 NON URBAN ALLOTMENTS

The stock of both occupied and vacant non-urban residential allotments have been determined on a lot by lot basis as at December 2009/January 2010. A low density 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.

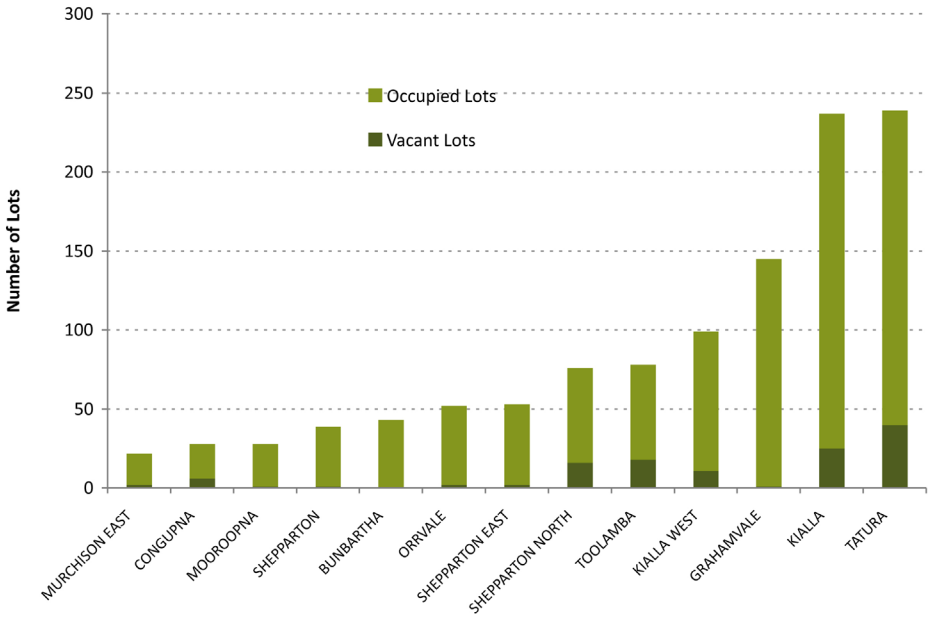
As at December 2009 across the municipality of Greater Shepparton there were a total of 1,139 non-urban allotments. Of these, 125 lots were vacant, a lot vacancy rate of only 11%. Graph 6 summarises the stock of both occupied and vacant non-urban residential allotments by suburb.

By zone type, as at December 2009 there were 1,008 Low Density Residential (LDRZ) allotments, of which 99 were vacant across the municipality, a lot vacancy of 10%. In comparison, there were a total of 131 Rural Living (RLZ) zoned allotments, of which 26 were vacant – a lot vacancy rate of 20%.

The location of the majority of non-urban lots across the municipality includes:

- Tatura – total 239 lots (lot vacancy of 17%);
- Kialla – total 237 lots (lot vacancy of 11%);
- Grahamvale – total 145 lots (lot vacancy of 1%);
- Kialla West – total 99 lots (lot vacancy of 11%);
- Toolamba – total 78 lots (lot vacancy of 23%); and
- Shepparton North – total 76 lots (lot vacancy of 21%).

Graph 6: Number of Vacant and Occupied 'non-urban' Allotments, 2009



Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Future non-urban (LDRZ and or RLZ) unzoned areas have been identified through Council consultation and are geographically identified in the accompanying maps.

In total (excluding minor infill) there is a residential lot supply of approximately 11,525. This is comprised of:

- 3,863 zoned broadhectare lots (34% of supply);
- 103 major infill lots (less than 1% of supply);
- 125 vacant non urban residential lots (1% of supply); and
- 7,434 designated future residential lots (65% of supply).

As at December 2009, there was 1,112 minor infill lots identified. Of these lots, 856 were sized less than 1,200sqm or 77% of the identified lots. Minor infill accounted for 12% of lot construction activity across Shepparton and of this lot construction, 47% was from parent lots sized 1,200sqm or less.

As at July 2011, there was a residential lot capacity within major infill sites of approximately 103 lots.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 348 lots per annum will be constructed within existing zoned broadhectare areas. This closely correlates to recent historical averages of broadhectare lot production at 373 lots per annum.

Over the 6-10 year period it is anticipated that approximately 345 lots per annum will be constructed. Post ten years, the existing stock of zoned broadhectare land supply will largely be depleted.

Within the municipality of Greater Shepparton, there is an estimated lot potential within Future Residential areas of approximately 7,434.

As at December 2009 across the municipality of Greater Shepparton there were a total of 1,139 non-urban allotments. Of these, 125 lots were vacant, a lot vacancy rate of only 11%.

6.0 Projected Demand

This report incorporates the most recently available demand figures to project dwelling requirements and compare with 'years of supply' of residential land. These figures currently use the *Victoria in Future 2012* projections as the basis for demand, which are updated in line with state population and household projections.

Victoria in Future 2012 is the Victorian Government's official population and household projections. Information is provided for state-wide, regional and metropolitan areas as well as local government areas. *Victoria in Future 2012* reflects 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 municipality of Greater Shepparton. In addition, it highlights historic 'expressed' demand for residential dwellings in the form of residential building approvals and lot construction.

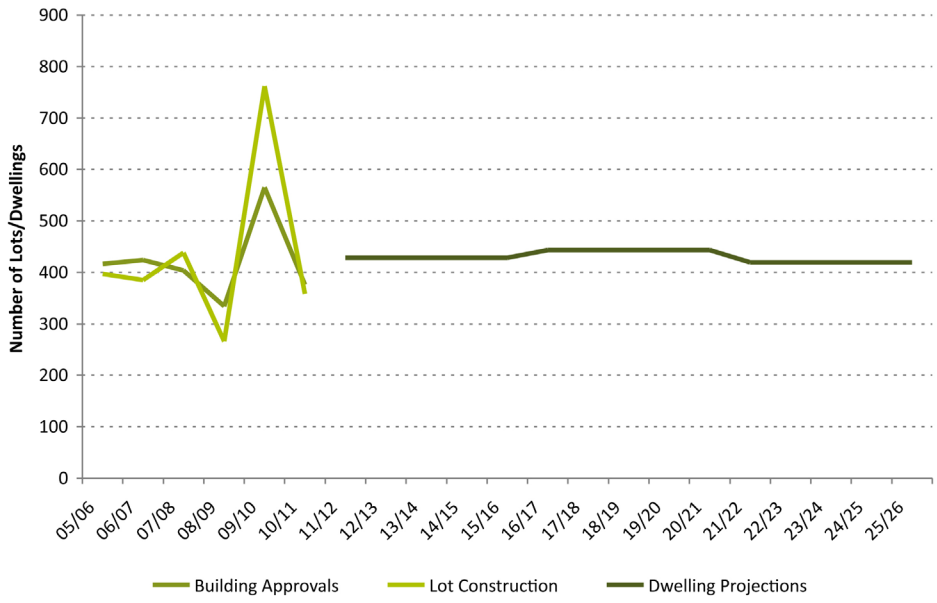
Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2026 a total of 6,450 additional dwellings (or on average 430 per annum) will be required to house the projected population for the City of Greater Shepparton. For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 – 428;
- 2016 to 2021 – 443; and
- 2021 to 2026 – 419.

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

- Part A: 392 dwellings per annum (e.g. Shepparton, Mooroopna and Kialla);
- Part B West: 10 dwellings per annum (e.g. Tatura, Byrnside and Murchison); and
- Part B East: 28 dwellings per annum (e.g. Kialla West, Dookie and Pine Lodge).

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



Source: Department of Planning and Community Development Victoria in Future 2012
Australian Bureau of Statistics, Catalogue No.8731.0 / Spatial Economics Pty Ltd

Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2026 a total of 6,450 additional dwellings (or on average 430 per annum) will be required to house the projected population for the City of Greater Shepparton. For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 – 428;
- 2016 to 2021 – 443; and
- 2021 to 2026 – 419.

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).

Based on historic (July 2005 to July 2011) lot construction activity it is estimated that the following proportions of dwelling requirements are for broadhectare/major infill allotments:

- Greater Shepparton – Part A, 88%.
- Greater Shepparton – Part B East, 64%; and
- Greater Shepparton – Part B West, 59%.

Table 4 summarises the estimated years of supply by demand scenario 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, there are sufficient land stocks to satisfy **10 years** of future demand.

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

- Greater Shepparton – Part A, **9 years** of demand;
- Greater Shepparton – Part B East, **7 years** of demand; and
- Greater Shepparton – Part B West, **15+ years** of demand.

In terms of future (unzoned) residential land supply stocks, there is sufficient land to satisfy over 15 years of projected demand. Future residential land stocks by SLA is sufficient to satisfy

- Greater Shepparton – Part A, **15+ years** of demand; and
- Greater Shepparton – Part B West, **15 years** of demand.

There is no future identified residential stock within the SLA Greater Shepparton – Part B East.

POTENTIAL LOT CONSTRUCTION ACTIVITY

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 366 lots per annum will be constructed within existing zoned broadhectare and major infill areas.

This rate of anticipated lot construction is similar to recent major infill and broadhectare lot production activity of 376 per annum. Based on anticipated lot construction activity 47% of the zoned residential broadhectare and major infill stock will be depleted over the next five years without additional rezonings.

Table 4: Estimated Years of Residential Broadhectare and Major Infill Land Supply, 2011

SLA/LGA	Zoned Stocks	Unzoned Stocks	Total Stocks
Gr. Shepparton (C) – Pt A	9	15+	**15+**
Gr. Shepparton (C) – Pt B East	7	0	**7**
Gr. Shepparton (C) – Pt B West	15+	15	**15+**
Shepparton LGA	**10**	**15+**	**15+**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

SUMMARY AND CONCLUSIONS

In total, there are sufficient zoned land stocks to satisfy **10 years** of future demand across the Greater Shepparton, although this varies across the municipality.

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

Greater Shepparton – Part A, **9 years** of demand;

Greater Shepparton – Part B East, **7 years** of demand; and

Greater Shepparton – Part B West, **15+ years** of demand.

In terms of future (unzoned) residential land supply stocks, there is sufficient land to satisfy **over 15 years** of projected demand. Future residential land stocks by SLA are sufficient to satisfy:

Greater Shepparton – Part A, **15+ years** of demand; and

Greater Shepparton – Part B West, **15 years** of demand.

There is no future identified residential stock within the SLA Greater Shepparton – Part B East.

8.0 RESIDENTIAL TABLES

Table 5: Minor Infill Lot Construction Activity, 2005-06 to 2010-11

SLA/Suburb/LGA	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	Average Lots Constructed
Gr. Shepparton (C) – Pt A	**38**	**40**	**37**	**66**	**67**	**34**	**47**
Kialla	0	15	2	2	17	11	**8**
Mooroopna	7	0	2	5	2	2	**3**
Shepparton	31	25	33	59	48	21	**36**
Gr. Shepparton (C) – Pt B East	**0**	**0**	**0**	**1**	**0**	**0**	**0.2**
Dookie	0	0	0	1	0	0	**0.2**
Gr. Shepparton (C) – Pt B West	**4**	**2**	**0**	**8**	**21**	**3**	**6**
Merrigum	0	1	0	0	4	0	**0.8**
Murchison	0	0	0	1	5	1	**1**
Murchison East	0	0	0	1	0	0	**0.2**
Tatura	4	1	0	6	12	2	**4**
Greater Shepparton LGA	**42**	**42**	**37**	**75**	**88**	**37**	**54**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 6: Parent Lot Size of Minor Infill Lot Construction, 2005-06 to 2010-11

	Parent Lot Size Area Sqm					
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
Gr. Shepparton (C) – Pt A	**0**	**57**	**79**	**105**	**33**	**8**
Kialla	0	0	0	21	18	8
Mooroopna	0	4	4	6	4	0
Shepparton	0	53	75	78	11	0
Gr. Shepparton (C) – Pt B East	**0**	**0**	**0**	**0**	**1**	**0**
Dookie	0	0	0	0	1	0
Gr. Shepparton (C) – Pt B West	**0**	**5**	**9**	**15**	**8**	**1**
Merrigum	0	0	0	1	4	0
Murchison	0	0	2	3	1	1
Murchison East	0	0	0	0	1	0
Tatura	0	5	7	11	2	0
Greater Shepparton LGA	**0**	**62**	**88**	**120**	**42**	**9**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 7: Major Infill Lot Construction Activity, 2005-06 to 2010-11

SLA/Suburb/LGA	Lots/Dwellings Constructed						Average Lot Production
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	
Gr. Shepparton (C) – Pt A	**0**	**0**	**0**	**0**	**18**	**6**	**4**
Shepparton	0	0	0	0	18	6	**4**
Gr. Shepparton (C) – Pt B East	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Katandra West	0	0	0	0	0	0	**0**
Gr. Shepparton (C) – Pt B West	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Murchison (Vic.)	0	0	0	0	0	0	**0**
Tatura	0	0	0	0	0	0	**0**
Greater Shepparton LGA	**0**	**0**	**0**	**0**	**18**	**6**	**4**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 8: Broadhectare Lot Construction Activity, 2005-06 to 2010-11

SLA/Suburb/LGA	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	Average Lot Production
Gr. Shepparton (C) – Pt A	**307**	**330**	**397**	**177**	**637**	**315**	**361**
Kialla	105	38	96	123	80	77	**87**
Mooroopna	74	21	89	0	22	0	**34**
Shepparton	128	248	143	37	441	161	**193**
Shepparton East	0	15	0	0	0	0	**3**
Shepparton North	0	8	69	0	82	77	**39**
Toolamba	0	0	0	17	12	0	**5**
Gr. Shepparton (C) – Pt B East	**0**	**0**	**0**	**4**	**14**	**0**	**3**
Katandra West	0	0	0	4	14	0	**3**
Gr. Shepparton (C) – Pt B West	**46**	**9**	**0**	**0**	**0**	**0**	**9**
Merrigum	0	9	0	0	0	0	**2**
Murchison	3	0	0	0	0	0	**1**
Tatura	43	0	0	0	0	0	**7**
Greater Shepparton LGA	**353**	**339**	**397**	**181**	**651**	**315**	**373**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 9: Low Density Residential Lot Construction Activity, 2005-06 to 2010-11

SLA/Suburb/LGA	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	Total Lots Constructed
Gr. Shepparton (C) – Pt A	**1**	**0**	**3**	**9**	**3**	**0**	**16**
Congupna	0	0	0	0	1	0	**1**
Mooroopna	0	0	0	0	1	0	**1**
Shepparton North	1	0	3	9	0	0	**13**
Toolamba	0	0	0	0	1	0	**1**
Gr. Shepparton (C) – Pt B West	**1**	**4**	**1**	**1**	**2**	**0**	**9**
Tatura	1	4	1	1	2	0	**9**
Greater Shepparton LGA	**2**	**4**	**4**	**10**	**5**	**0**	**25**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 10: Minor Infill (vacant lots) Supply by Lot Size Cohort, December 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
Gr. Shepparton (C) – Pt A	**126**	**327**	**302**	**104**	**74**	**14**	**947**
Kialla	18	43	130	75	27	2	**295**
Mooroopna	1	30	28	4	1	3	**67**
Orrvale	23	5	1	0	3	0	**32**
Shepparton	84	238	123	23	17	6	**491**
Shepparton East	0	0	2	0	12	0	**14**
Shepparton North	0	7	18	0	5	0	**30**
Toolamba	0	4	0	2	9	3	**18**
Gr. Shepparton (C) – Pt B East	**1**	**6**	**3**	**8**	**12**	**6**	**36**
Arcadia	1	0	0	0	0	0	**1**
Dookie	0	3	1	1	3	1	**9**
Katandra West	0	3	2	7	9	5	**26**
Gr. Shepparton (C) – Pt B West	**4**	**56**	**31**	**17**	**11**	**10**	**129**
Merrigum	1	3	0	4	2	1	**11**
Murchison	0	3	4	2	4	5	**18**
Tatura	3	50	27	10	5	2	**97**
Undera	0	0	0	1	0	2	**3**
Greater Shepparton LGA	**131**	**389**	**336**	**129**	**97**	**30**	**1112**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 11: Major Infill Lot Potential and Anticipated Development Timing (lots), 2011

SLA/Suburb/LGA	Development Timing (lots/dwellings)				Total Lot/ Dwelling Potential
	1-2 years	3-5 years	6-10 years	11+ years	
Gr. Shepparton (C) – Pt A	**0**	**51**	**0**	**0**	**51**
Shepparton	0	51	0	0	**51**
Gr. Shepparton (C) – Pt B East	**0**	**0**	**6**	**0**	**6**
Katandra West	0	0	6	0	**6**
Gr. Shepparton (C) – Pt B West	**0**	**40**	**6**	**0**	**46**
Murchison (Vic.)	0	0	6	0	**6**
Tatura	0	40	0	0	**40**
Greater Shepparton LGA	**0**	**91**	**12**	**0**	**103**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 12: Broadhectare Lot Potential and Anticipated Development Timing (lots), 2011

SLA/Suburb/LGA	Development Timing (Lots)				Total Zoned Stocks	Potential Residential (Unzoned)	Total Broad Hectare Lot Stock
	1-2 years	3-5 years	6-10 years	11+ years			
Gr. Shepparton (C) – Pt A	**651**	**885**	**1,698**	**139**	**3,373**	**7,155**	**10,528**
Congupna	0	0	0	0	**0**	0	**0**
Grahamvale	0	0	0	0	**0**	0	**0**
Kialla	160	324	824	139	**1,447**	0	**1,447**
Mooroopna	114	180	130	0	**424**	1,310	**1,734**
Shepparton	220	174	496	0	**890**	5,545	**6,435**
Shepparton East	0	0	17	0	**17**	0	**17**
Shepparton North	157	207	231	0	**595**	300	**895**
Toolamba	0	0	0	0	**0**	0	**0**
Gr. Shepparton (C) – Pt B East	**0**	**0**	**0**	**49**	**49**	**0**	**49**
Congupna	0	0	0	0	**0**	0	**0**
Dookie	0	0	0	17	**17**	0	**17**
Katandra West	0	0	0	0	**0**	0	**0**
Kialla West	0	0	0	0	**0**	0	**0**
Tallygaroopna	0	0	0	32	**32**	0	**32**
Gr. Shepparton (C) – Pt B West	**0**	**203**	**28**	**210**	**441**	**279**	**720**
Merrigum	0	0	0	0	**0**	0	**0**
Murchison	0	0	0	0	**0**	0	**0**
Tatura	0	203	28	210	**441**	138	**579**
Tatura East	0	0	0	0	**0**	141	**141**
Undera	0	0	0	0	**0**	0	**0**
Greater Shepparton LGA	**651**	**1,088**	**1,726**	**398**	**3,863**	**7,434**	**11,297**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

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.

Table 13(a): Occupied and Vacant Low Density Residential Zoned Lots, 2009

SLA/Suburb/LGA	Vacant	Occupied	Vacancy Rate (%)	Total Lots
Gr. Shepparton (C) – Pt A	**52**	**586**	**8%**	**638**
Congupna	6	22	21%	**28**
Grahamvale	1	144	1%	**145**
Kialla	7	138	5%	**145**
Mooroopna	1	27	4%	**28**
Orrvale	2	50	4%	**52**
Shepparton	1	38	3%	**39**
Shepparton East	2	51	4%	**53**
Shepparton North	16	60	21%	**76**
Toolamba	16	56	22%	**72**
Gr. Shepparton (C) – Pt B East	**4**	**102**	**4%**	**106**
Bunbartha	0	43	0%	**43**
Kialla West	4	59	6%	**63**
Gr. Shepparton (C) – Pt B West	**43**	**221**	**16%**	**264**
Murchison East	2	20	9%	**22**
Tatura	40	199	17%	**239**
Toolamba	1	2	33%	**3**
Greater Shepparton LGA	**99**	**909**	**10%**	**1008**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 13(b): Occupied and Vacant Rural Living Zoned Lots, 2009

SLA/Suburb/LGA	Vacant	Occupied	Vacancy Rate (%)	Total Lots
Gr. Shepparton (C) – Pt A	**18**	**66**	**21%**	**84**
Kialla	18	66	21%	**84**
Gr. Shepparton (C) – Pt B East	**7**	**37**	**16%**	**44**
Kialla	0	8	0%	**8**
Kialla West	7	29	19%	**36**
Gr. Shepparton (C) – Pt B West	**1**	**2**	**33%**	**3**
Toolamba	1	2	33%	**3**
Greater Shepparton LGA	**26**	**105**	**20%**	**131**

Source: Spatial Economics Pty Ltd and Department of Planning and Community Development 2011

Table 14(a): Estimated and Projected Population, 2010 to 2026

	Estimated Resident Population				
SLA /LGA	2010	2011	2016	2021	2026
Gr. Shepparton (C) – Pt A	49,859	50,473	54,066	57,510	60,556
Gr. Shepparton (C) – Pt B East	3,991	3,988	4,032	4,061	4,096
Gr. Shepparton (C) – Pt B West	9,485	9,496	9,602	9,718	9,892
Greater Shepparton LGA	**63,335**	**63,956**	**67,699**	**71,288**	**74,545**

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

Table 14(b): Estimated and Projected Number of Dwellings, 2010 to 2026

	Structural Private Dwellings				
SLA /LGA	2010	2011	2016	2021	2026
Gr. Shepparton (C) – Pt A	19,814	20,156	22,116	24,143	26,033
Gr. Shepparton (C) – Pt B East	1,479	1,485	1,536	1,586	1,637
Gr. Shepparton (C) – Pt B West	3,701	3,716	3,845	3,982	4,138
Greater Shepparton LGA	**24,994**	**25,357**	**27,497**	**29,712**	**31,807**

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

Table 14(c): Projected Average Annual Change in the Number of Persons and Dwellings, 2011 to 2026

	Estimated Resident Population				Structural Private Dwellings			
SLA /LGA	2011 to 2016	2016 to 2021	2021 to 2026	2011 to 2026	2011 to 2016	2016 to 2021	2021 to 2026	2011 to 2026
Gr. Shepparton (C) – Pt A	719	689	609	672	392	405	378	392
Gr. Shepparton (C) – Pt B East	9	6	7	7	10	10	10	10
Gr. Shepparton (C) – Pt B West	21	23	35	26	26	28	31	28
Greater Shepparton LGA	**749**	**718**	**651**	**706**	**428**	**443**	**419**	**430**

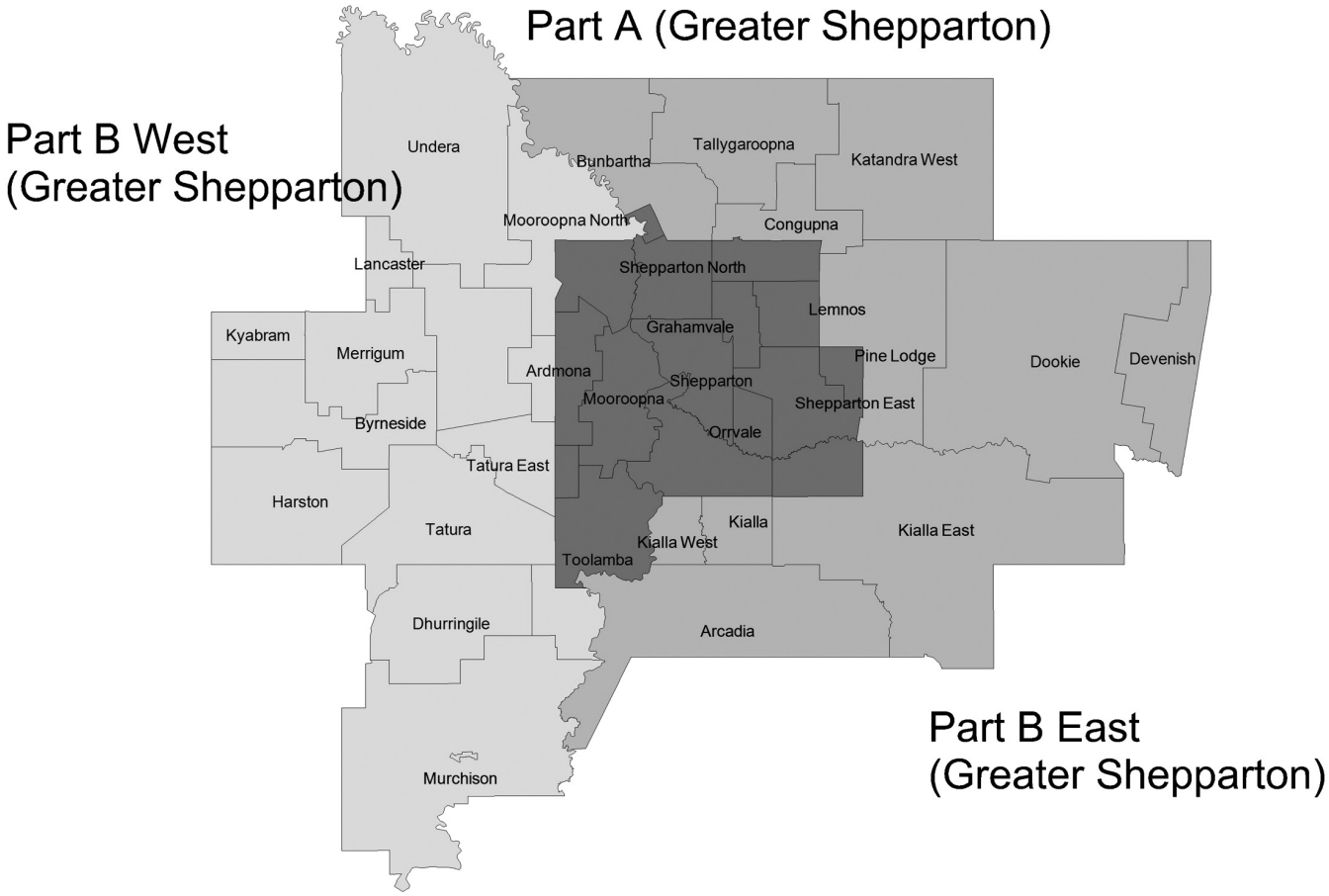
Source: Department of Planning and Community Development Victoria in Future 2012

Table 14(d): Projected Average Annual Percentage Change in the Number of Persons and Dwellings, 2011 to 2026

	Estimated Resident Population				Structural Private Dwellings			
SLA /LGA	2011 to 2016	2016 to 2021	2021 to 2026	2011 to 2026	2011 to 2016	2016 to 2021	2021 to 2026	2011 to 2026
Gr. Shepparton (C) – Pt A	1.4%	1.2%	1.0%	1.2%	1.9%	1.8%	1.5%	1.7%
Gr. Shepparton (C) – Pt B East	0.2%	0.1%	0.2%	0.2%	0.7%	0.6%	0.6%	0.6%
Gr. Shepparton (C) – Pt B West	0.2%	0.2%	0.4%	0.3%	0.7%	0.7%	0.8%	0.8%
Greater Shepparton LGA	**1.1%**	**1.0%**	**0.9%**	**1.0%**	**1.6%**	**1.6%**	**1.4%**	**1.4%**

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

LOCATION OF SUBURBS AND STATISTICAL LOCAL AREAS – GREATER SHEPPARTON



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 Urban Development Program, 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 is has an 'Urban Growth Zone' applied, and a precinct structure plan has not yet been approved, falls into this category.

LOCAL GOVERNMENT AREA (LGA)

A geographical area that is administered by a local council.

LOT

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

MAJOR INFILL

Undeveloped land within the existing urban area, zoned for residential development, and parent lot or existing lot greater than 1ha. Major infill projects include residential redevelopment projects that are proposed to be converted or redeveloped for residential purposes and that will yield 10 or more dwellings.

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 Urban Development Program. 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. This includes vacant residential lots.

NON-URBAN 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.