Urban Development Program

2013

Regional Residential Report

Shire of Wellington

State Government Victoria
Department of Transport, Planning and Local Infrastructure

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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. Assessments completed to date include the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura. Residential land supply assessments for the G21 consortium of councils are available on the G21 Regional Growth Plan - Implementation Plan website.

Additional land supply assessments undertaken for the municipalities of Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland are also near completion.

This round of land supply assessments include the municipal areas of: Wellington, Southern Grampians, Ararat, Swan Hill, Campaspe, East Gippsland, Glenelg and Benalla.

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

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 Wellington.

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.

RECENT ACTIVITY

As measured from July 2006 to July 2012 residential building approval activity within the Shire of Wellington has averaged 312 per annum. The vast majority of building approvals (92%) since July 2006 have been separate houses, the remaining 8% for medium density dwellings.

The most (38% or 118 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Wellington – Sale. Within the Wellington – Rosedale SLA there was on average 73 residential dwelling approvals per annum from July 2006 to July 2012, representing 23% of the municipalities total approval activity. There was an average of 62 residential building approvals per annum within the SLA of Wellington – Maffra,

From July 2006 to December 2012 there was an average annual residential lot construction of 232. The most (43%) were minor infill lots, followed by rural residential lot and broadhectare/major infill lot construction at 28% each.

The majority (32%) of residential lot construction activity was located within the suburb of Sale, followed by Wurruk (9%), Stratford (8%) and Maffra (8%).

PROJECTED DEMAND

Projected dwelling requirements sourced from *Victoria in Future 2012* indicate that from 2011 to 2031 there will be a total dwelling requirement of 4,664 (233 average per annum).

An alternative demand projection has been developed that is based on recent (2006 to 2012) building approval activity – a measure of expressed demand, in conjunction with growth rates identified in the State Governments' projections. This demand scenario results in an average annual dwelling requirement of 344 dwellings per annum.

This growth scenario results in a 45% (2,160 dwellings) increase in total dwelling requirements from 2011 to 2031.

IDENTIFIED RESIDENTIAL LAND SUPPLY

In total (excluding minor infill) there is a residential lot supply of approximately 8,708. This is comprised of:

- 2,390 zoned broadhectare/major infill lots (27% of supply);
- 1,854 vacant rural residential lots (21% of supply); and
- 4,464 designated future residential lots (51% of supply).

As at December 2009, there was 1,217 minor infill lots identified. Of these lots, 998 were sized less than 1,200sqm or 82% of the identified minor infill lot supply.

As at December 2012, there was a zoned residential lot capacity within broadhectare/major infill areas of approximately 2,390 of which 26% (615 lots) is located in Stratford, 25% (593 lots) in Sale, 12% (284 lots) in Stradbroke and 12% (280 lots) in Maffra.

Within the Shire of Wellington, there is an estimated lot potential within Future Residential areas of approximately 4,464. Of this lot potential:

- 2,200 lots are located in Wurruk;
- 1,200 lots in Sale;
- 600 lots in Longford;
- 300 lots in Rosedale; and
- 164 lots in Heyfield.

As at December 2009 across the Shire of Wellington there was a total lot stock of rural residential allotments of 4,072. Of this stock, 1,854 lots were vacant, a lot vacancy rate of 46%. A total of 650 hectares of future rural residential land stocks have been identified, of which 115.7 hectares is for future LDRZ and 534.3 hectares is for future RLZ.

YEARS OF RESIDENTIAL LAND SUPPLY

Two projected demand scenarios are used to assess the years of residential land stocks, the outcomes are summarised below.

Victoria in Future 2012 Demand Scenario

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 over 15 years of future demand.

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

- over 15 years: Alberton SLA;
- over 15 years Avon SLA;
- over 15 years: Maffra SLA;
- over 15 years: Rosedale; and
- 14 years: Sale SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy over 15 years of projected demand across the municipality, by SLA is sufficient to satisfy:

- 15 years: Maffra;
- over 15 years: Rosedale; and
- over 15 years: Sale.

There are no future (unzoned) residential land stocks in the SLAs of Alberton and Avon.

Historic Trend Based Demand Scenario

In terms of zoned broadhectare/major infill and future (unzoned) residential land stocks it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy 15 years and over 15 years of future demand respectively.

However, at an SLA level, zoned broadhectare and major infill supply using the historic trend demand scenario the years of supply is reduced to 10 years within the SLA of Sale.

In terms of future residential land supply stocks, this is reduced to 11 years of supply within the SLA of Maffra.

Conclusions and Current Actions

In summary there is an adequate stock of zoned residential land to meet *Victoria in Future 2012* and trend based consumption rates within the Shire of Wellington. There are also sufficient stocks of future (or unzoned) residential land to meet longer term requirements. Consumption of residential land, however, should continue to be monitored to ensure there are sufficient land stocks to meet future demand.

In November 2012, Amendment C67 was approved, which incorporated the 'Sale, Wurruk and Longford Structure Plan' in the Shire of Wellington Planning Scheme. The Structure Plan identifies longer term residential and industrial land supply to support future growth. Similar plans have been prepared for Heyfield and Rosedale. These supply areas have been incorporated into the Urban Development Program.

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 2009-2010, the Urban Development Program was expanded across key provincial areas across regional Victoria, and is incrementally being rolled out across the State. Assessments completed to date include the municipalities of Ballarat, Greater Bendigo, Latrobe and Wodonga, Wangaratta, Greater Shepparton, Warrnambool, Horsham and Mildura. Residential land supply assessments for the G21 consortium of councils are available on the G21 Regional Growth Plan - Implementation Plan website.

Additional land supply assessments undertaken for the municipalities of Bass Coast, Baw Baw, Macedon Ranges, Mitchell, Moorabool, Mount Alexander, Moyne and South Gippsland are also near completion.

This round of land supply assessments include the municipal areas of: Wellington, Southern Grampians, Ararat, Swan Hill, Campaspe, East Gippsland, Glenelg and Benalla.

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 industrial and residential land supply assessments 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 URBAN DEVELOPMENT PROGRAM REPORTS

The 2013 Urban Development Program Reports for Wellington, Southern Grampians, Ararat, Swan Hill, Campaspe, East Gippsland, Glenelg and Benalla, as well as additional Regional Reports and the metropolitan Urban Development Program Annual Report, are available online at www.dpcd.vic.gov.au/urbandevelopmentprogram

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 & 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 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 finalisation of certificate of title.

Construction activity has been assessed on an annual basis as at July of each year from 2006 to 2012, additional analysis has been included to identify lot construction to December 2012.

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 (2013–2014);
- 3 to 5 years (2015–2017);
- 6 to 10 years (2018–2022);
- 11 years or more (2023 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

Wellington Shire offers very real opportunities to experience a healthy and prosperous lifestyle with quality health and education facilities, coupled with high quality business and recreational opportunities. With a very stable work force and natural wonders within arm's reach in every direction, Wellington Shire is an attractive place to live and do business.

Wellington Shire's competitive advantages lie in its diversity, which is important to a number of areas:

- the Wellington Shire has a remarkably diverse industrial landscape, which also translates to the work force. Ranging from aviation to oil and gas; and from agriculture to professional services; there are employment and investment possibilities for a wide variety of interests and specialties;
- comprising of mountains, one of the longest beaches in the World, the idyllic Gippsland lakes and sprawling countryside; the region is blessed with natural attractions nothing short of amazing;
- the natural surroundings provide endless opportunities for cycling, fishing, swimming, surfing, kayaking etc.

It is this diversity that keeps people here and encourages visitors to return. Furthermore, there are housing options to suit all tastes and budgets, a huge number of quality education institutions and a selection of thriving, community-minded towns.[1]

This report covers the trends and shifts in building activity across the Shire of Wellington, 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 Wellington Ranges. It is supported by datasets from the Australian Bureau of Statistics.

[1] Council website

4.0 RECENT ACTIVITY

This section of the report details the recent activity of residential lot construction and dwelling approvals across the Shire of Wellington. Residential lot construction activity is detailed from July 2006 to December 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 July 2012 residential building approval activity within the Shire of Wellington has averaged 312 per annum, the amount of building approval activity as measured on an annual basis has been relatively consistent. However, approvals peaked at 373 in 2009/10 and troughed at 281 in 2011/12.

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

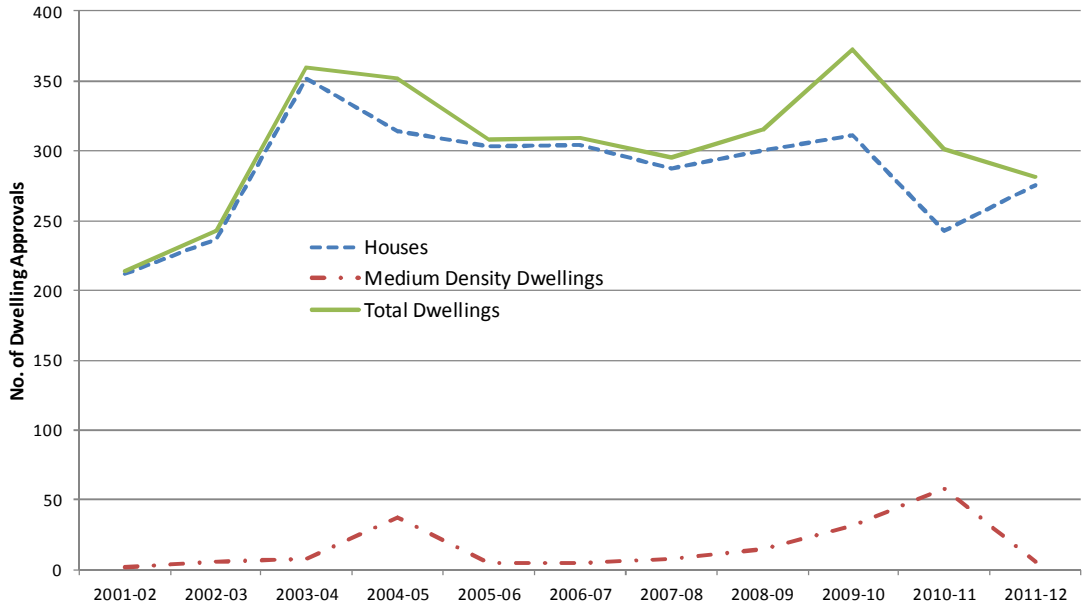
The vast majority of building approvals (92%) since July 2006 have been separate houses, the remaining 8% for medium density dwellings.

The most (38% or 118 per annum) of building approval activity since July 2006 has been located within the Statistical Local Area (SLA) of Wellington – Sale.

Within the Wellington – Rosedale SLA there was on average 73 residential dwelling approvals per annum from July 2006 to July 2012, representing 23% of the municipalities total approval activity.

There was an average of 62 residential building approvals per annum within the SLA of Wellington – Maffra, 35 (per annum) residential building approvals within the SLA of Wellington – Avon and 26 (per annum) residential building approvals within the SLA of Wellington – Alberton.

Graph 1: Number of Residential Building Approvals by Type, July 2002 to July 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 December 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 Shire of Wellington. From July 2006 to December 2012 there was an average annual residential lot construction of 232. The most (43%) were minor infill lots, followed by rural residential lot and broadhectare/major infill lot construction at 28% each.

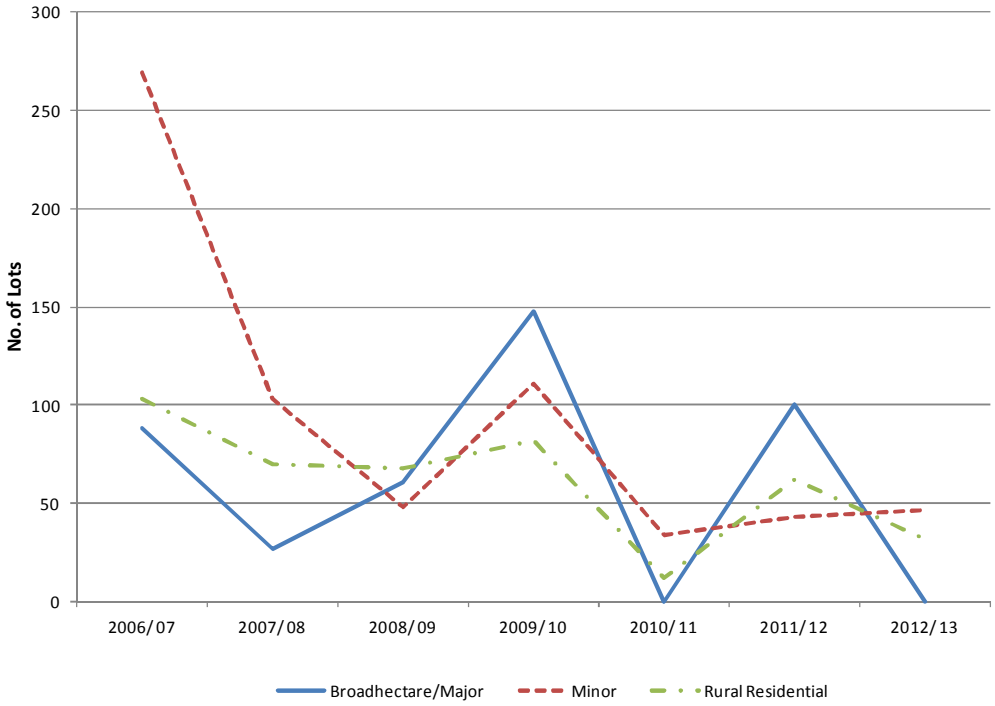
In comparison to the annual volume of residential building approvals, residential lot construction varies considerably. Residential lot construction was the lowest in 2010-11 at 46 lots and 'peaked' in 2006-07 at 460 lots and 341 lots constructed on 2009-10. As measured to the December Quarter 2012 there have been 79 residential lots constructed in 2012-13.

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 (32%) of residential lot construction activity was located within the suburb of Sale, followed by Wurruk (9%), Stratford (8%) and Maffra (8%).

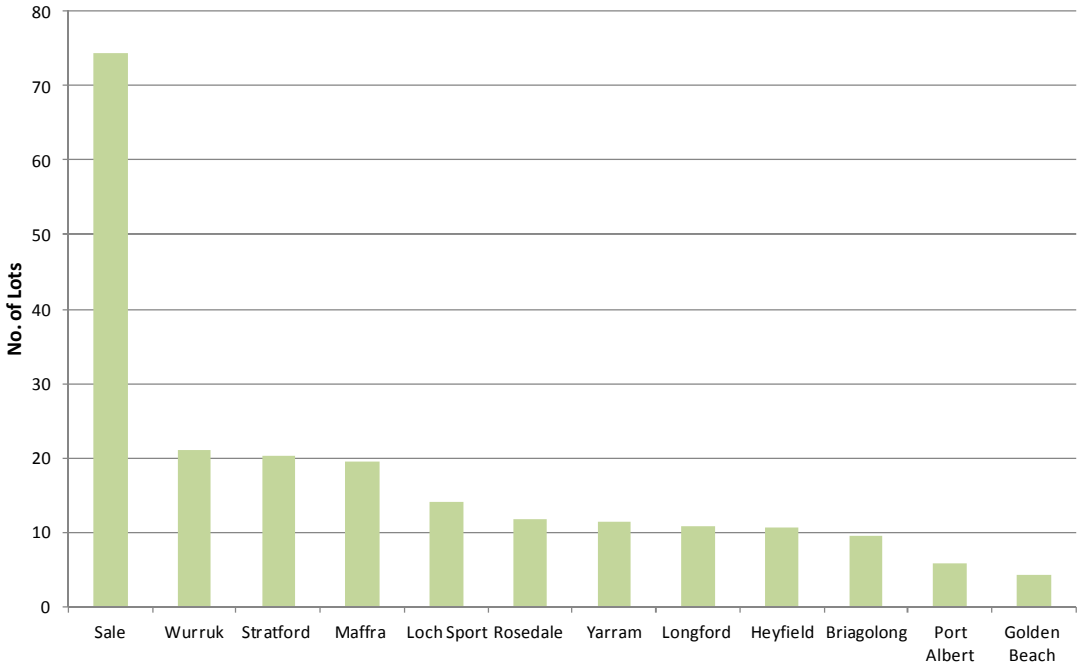
Lot construction and residential building approval activity as measured from July 2006 to December 2012 differs significantly at 232 and 312 respectively per annum. The difference infers the construction of dwellings on vacant allotments constructed prior to July 2006 and potentially not all building approvals go through to construction.

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



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

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



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*
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 Shire of Wellington averaged 101 lots per annum. This represents 43% of all residential lot construction activity across the municipality.

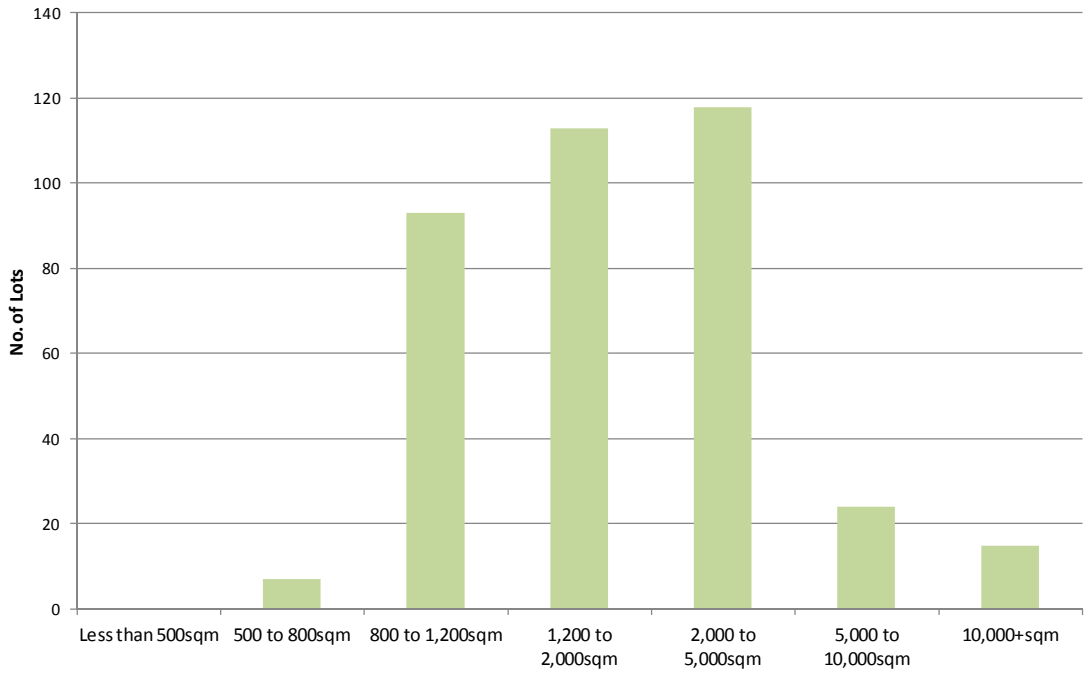
Minor infill lot construction activity was concentrated within the established urban area of Sale (30% of activity), Loch Sport (14%), Yarram (9%) and Stratford (7%).

As measured annually from July 2006 to December 2012, the amount of minor infill lot construction activity has varied significantly. In 2008-09 there were approximately 48 minor infill lots constructed, considerably less than the 269 constructed in 2006-07. As measured to the December Quarter 2012 there have been 47 minor infill lots constructed.

Analysis has been undertaken to determine the 'parent' lot size of subdivided minor infill lots, specifically the lot size prior to subdivision. Graph 4 summarises the number of minor infill lot construction projects by selected 'parent' lot size cohorts.

Of the 370 minor infill lot construction projects (yield of 655 net lots) since July 2006 there were only 7 'parent' lots (2%) sized less than 800sqm. The majority of the 'parent' lots (118 or 32%) prior to subdivision were sized from 2,000 to 5,000sqm, followed by 'parent' lots sized from 1,200 to 2,000sqm (93 or 25%).

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



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*
Note: *Parent lot size refers to the size of the allotment prior to subdivision.*

4.2.2 BROADHECTARE AND MAJOR INFILL LOT CONSTRUCTION

Broadhectare/Major Infill lot construction activity as measured from July 2006 to December 2012 across the Shire of Wellington averaged 65 lots per annum. This represents 28% of all residential lot construction activity across the municipality.

Broadhectare/major infill lot construction activity was located across the major urban areas of the municipality, the proportional distribution of activity includes: Sale (63%); Maffra (14%); Stratford (13%); Rosedale (6%) and Yarram (4%).

As measured annually from July 2006 to December 2012, the amount of broadhectare/major infill lot construction activity has varied significantly. In 2006-07 there was approximately 88 lots constructed declining to 27 lots constructed the following year. Broadhectare/major infill lot production increased to 148 lots in 2009-10 with no lots produced in 2010-11.

4.2.3 RURAL RESIDENTIAL LOT CONSTRUCTION

Rural Residential lot construction activity as measured from July 2006 to December 2012 across the Shire of Wellington has averaged 66 lots per annum. This represents 28% of all residential lot construction activity across the municipality.

Of this lot construction activity – 43% was zoned Low Density Residential (LDRZ) and 57% Rural Living (RLZ). The majority of this subdivision activity was located in the towns of Wurruk, Longford and Heyfield.

From July 2006 to December 2012 there was an average annual residential lot construction of 232. The most (43%) were minor infill lots, followed by rural residential lot and broadhectare/major infill lots construction at 28% each.

Over the same period, residential building approval activity has averaged 312 per annum, of which the vast majority (92%) has been for separate houses

Analysis of the amount of building approvals and residential lot construction overall indicates a functioning residential land market across the Shire of Wellington.

However, lot construction activity should continue to be monitored to identify lot production trends, and 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.

5.0 RESIDENTIAL LAND SUPPLY

This section of the report details the stock (measured in lots) of residential land across the Shire of Wellington as at December 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 Shire of Wellington as at December 2012. In total (excluding minor infill) there is a residential lot supply of approximately 8,708. This is comprised of:

- 2,390 zoned broadhectare/major infill lots (27% of supply);
- 1,854 vacant rural residential lots (21% of supply); and
- 4,464 designated future residential lots (51% 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, December 2012

SLA/Suburb/LGA	Lots				No Estimated Yield (Area hectares)	
	Broadhectare / Major	Rural Residential	Future (unzoned)	Total Lots	Broadhectare / Major	Future (unzoned)
Wellington (S) - Alberton	***172***	***54***	***0***	***226***	***20.9***	***0***
Alberton (Vic.)	2	0	0	**2**	0	0
Carrajung	0	1	0	**1**	0	0
Devon North	0	5	0	**5**	0	0
Port Albert	0	0	0	**0**	7.2	0
Robertsons Beach	20	0	0	**20**	13.8	0
Won Wron	0	4	0	**4**	0	0
Woodside (Vic.)	0	38	0	**38**	0	0
Yarram	150	6	0	**156**	0	0
Wellington (S) – Avon[1]	***615***	***71***	***0***	***686***	***37.2***	***0***
Briagolong	0	14	0	**14**	0	0
Cobains	0	7	0	**7**	0	0
Dargo	0	3	0	**3**	8.7	0
Licola	0	2	0	**2**	0	0
Meerlieu	0	18	0	**18**	0	0
Munro	0	9	0	**9**	0.9	0
Stratford (Vic.)	615	18	0	**633**	27.6	0
Wellington (S) - Maffra	***491***	***119***	***164***	***774***	***12.5***	***0***
Briagolong	0	18	0	**18**	1.0	0
Coongulla	0	10	0	**10**	0	0
Glenmaggie	0	19	0	**19**	2.6	0
Heyfield	211	36	164	**411**	0	0
Maffra (Vic.)	280	26	0	**306**	4.8	0
Newry	0	0	0	**0**	4.1	0
Seaton (Vic.)	0	10	0	**10**	0	0
Wellington (S) – Rosedale[2]	***492***	***1,556***	***900***	***2,948***	***18.8***	***0***
Cowwarr	0	0	0	**0**	17.3	0
Golden Beach (Vic.)	0	1,115	0	**1,115**	0	0
Gormandale	0	8	0	**8**	0	0
Longford (Vic.)	16	410	600	**1,026**	1.5	0
Rosedale (Vic.)	184	5	300	**489**	0	0
Seaspray	8	13	0	**21**	0	0
Stradbroke	284	0	0	**284**	0	0
Wurruk	0	5	0	**5**	0	0
Wellington (S) - Sale	***620***	***54***	***3,400***	***4,074***	***0***	***0***
Sale	593	14	1,200	**1,807**	0	0
Wurruk	27	40	2,200	**2,267**	0	0
Wellington (S)	**2,390**	**1,854**	**4,464**	**8,708**	**89.5**	**0**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*
Note: *Rural Residential supply refers to vacant (as at 2009) LDRZ and RLZ zoned allotments. It does not assess the development capacity of existing zoned lots developed with a single dwelling or the development potential of vacant lots.*
1: A total of 168 hectares (1,300 lots) designated Future Residential technically located within the Rosedale SLA, however functionally is supply for urban area of Sale (suburbs of Sale and Wurruck) and has been classified to be located in the Sale SLA to match with the demand projections. 2: A total of 150 hectares (1,110 lots) designated Future Residential and 43 hectares (397 lots) of zoned residential land technically located in the Avon SLA, however functionally is supply for urban area of Sale and has been classified to be located in the Sale SLA to match with the demand projections.

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 1,217 minor infill lots identified. Of these lots, 998 were sized less than 1,200sqm or 82% of the identified lots. In addition there were:

- 98 vacant lots sized between 1,200 to 2,000sqm;
- 101 lots sized from 2,000sqm to 5,000sqm; and
- 20 lots sized from 5,000 to 10,000sqm.

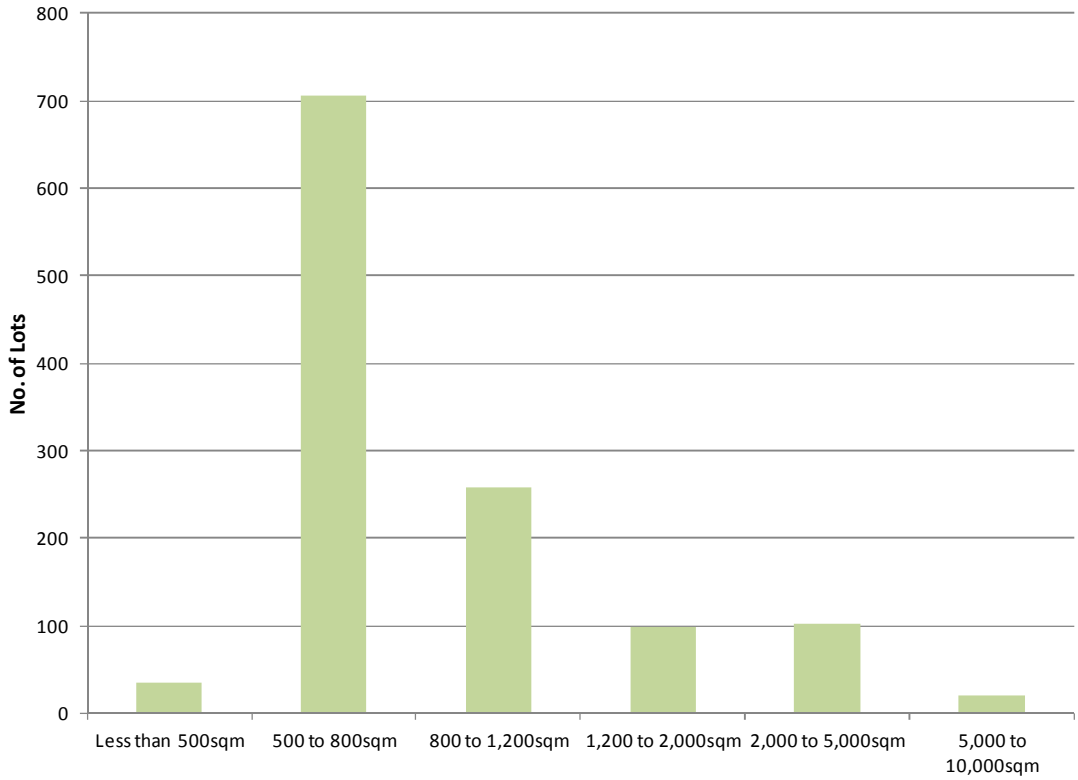
Graph 5 summarises the size distribution of identified minor infill supply.

All of these allotments have potential to yield multiple lots post subdivision. As noted previously 43% of lot construction activity across Wellington was minor infill.

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

- Loch Sport – 629 lots;
- Sale – 112 lots;
- Maffra – 66 lots; and
- Rosedale – 65 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 2013*

5.2 BROADHECTARE AND MAJOR INFILL SUPPLY

As at December 2012, there was a zoned residential lot capacity within broadhectare/major infill areas of approximately 2,390 of which 26% (615 lots) is located in Stratford, 25% (593 lots) in Sale, 12% (284 lots) in Stradbroke and 12% (280 lots) in Maffra. Table 2 identifies the lot yield and estimated development timing of zoned broadhectare/major infill lot stock.

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

SLA/LGA	1-2 years	3-5 years	6-10 years	11+ years	No Timing[1]	Total Zoned Stocks	Future (unzoned)	Total Lots (zoned/un-zoned)
Wellington (S) - Alberton	0	0	0	0	172	**172**	0	**172**
Wellington (S) – Avon[2]	36	86	72	265	156	**615**	0	**615**
Wellington (S) - Maffra	90	36	75	0	290	**491**	164	**655**
Wellington (S) – Rosedale[3]	110	29	280	0	73	**492**	900	**1,392**
Wellington (S) - Sale	80	319	180	0	41	**620**	3,400	**4,020**
Wellington (S)	**316**	**470**	**607**	**265**	**732**	***2,390***	**4,464**	**6,854**

1: *The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential development timing.*
2*: A total of 168 hectares (1,300 lots) designated Future Residential technically located within the Rosedale SLA, however functionally is supply for urban area of Sale (suburbs of Sale and Wurruck) and has been classified to be located in the Sale SLA to match with the demand projections.* ***3****: A total of 150 hectares (1,110 lots) designated Future Residential and 43 hectares (397 lots) of zoned residential land technically located in the Avon SLA, however functionally is supply for urban area of Sale and has been classified to be located in the Sale SLA to match with the demand projections.*
Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Zoned broadhectare/major infill lot potential represents 27% of the total existing residential land supply across the Shire of Wellington.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 157 lots per annum will be constructed within existing zoned broadhectare/major infill areas. This activity is anticipated to be mainly in Sale (78 lots per annum), Stratford, Maffra (24 lots per annum respectively) and Stradbroke (19 lots per annum). Historically, broadhectare/major infill lot constructed has averaged 65 lots per annum across the municipality.

In addition, there is a total broadhectare lot potential of 732 with no anticipated development timing allocated. This supply is mainly located in Heyfield (203 lots), Stratford (156 lots) and Yarram (150 lots).

NO YIELD

A total 89 hectares (50 lots) of zoned vacant land over one hectare in size has been identified that has the potential for broadhectare style subdivision. However, these parcels are typically in low demand areas, zoned Township (TZ), strategic assessments have not been completed and in many instances un-sewered. Such stock is located in:

- Stratford – 27.6 hectares; and
- Cowwarr – 17.3 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 Shire of Wellington 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 Shire of Wellington, there is an estimated lot potential within Future Residential areas of approximately 4,464. Of this lot potential:

- 2,200 lots are located in Wurruk;
- 1,200 lots in Sale;
- 600 lots in Longford;
- 300 lots in Rosedale; and
- 164 lots in Heyfield.

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. Rural residential supply refers to vacant (as at 2009) LDRZ and RLZ zoned allotments. It does not assess the development capacity of existing zoned lots developed with a single dwelling or the development potential of vacant lots.

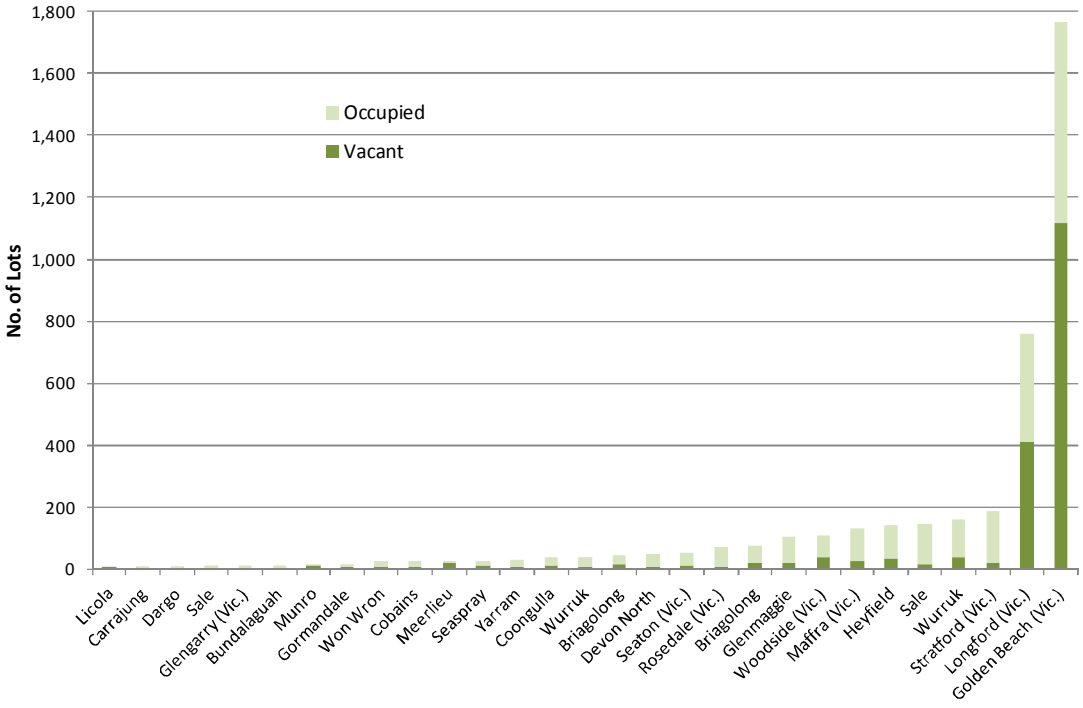
As at December 2009 across the Shire of Wellington there was a total lot stock of rural residential allotments of 4,072. Of this stock, 1,854 lots were vacant, a lot vacancy rate of 46%. Graph 6 summarises the stock of both occupied and vacant rural residential allotments by suburb.

By zone type, as at December 2009 there were 2,730 Low Density Residential (LDRZ) allotments, of which 1,621 were vacant across the municipality, a lot vacancy of 59%. In comparison, there were a total of 1,342 Rural Living (RLZ) zoned allotments, of which 233 were vacant – a lot vacancy rate of 17%.

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

- Golden Beach - total 1,765 lots (lot vacancy of 63%);
- Longford - total 758 lots (lot vacancy of 54%);
- Stratford - total 186 lots (lot vacancy of 10%);
- Wurruk - total 159 lots (lot vacancy of 25%); and
- Sale - total 147 lots (lot vacancy of 10%).

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



Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Future rural residential (LDRZ and or RLZ) unzoned areas have been identified through Council consultation and are geographically identified in the accompanying maps. In summary a total of 635.5 hectares of future rural residential land stocks have been identified, of which 101.2 hectares is for future LDRZ and 534.3 hectares is for future RLZ. The location of the future rural residential land stocks is detailed in Table 12.

In total (excluding minor infill) there is a residential lot supply of approximately 8,708. This is comprised of:

- *2,390 zoned broadhectare/major infill lots (27% of supply);*
- *1,854 vacant rural residential lots (21% of supply); and*
- *4,464 designated future residential lots (51% of supply).*

As at December 2009, there was 1,217 minor infill lots identified. Of these lots, 998 were sized less than 1,200sqm or 82% of the identified lots.

As at December 2012, there was a residential lot capacity within broadhectare areas of approximately 6,854 of which 59% (1,392 lots) is located in Sale and 20% (655 lots) in Rosedale.

Based on existing planning permits, recent construction activity and Council feedback it is anticipated that over the next five years, on average 157 lots per annum will be constructed within existing zoned broadhectare areas. Historically, broadhectare lot constructed has averaged 65 lots per annum.

Within the Shire of Wellington, there is an estimated lot potential within Future Residential areas of approximately 4,464.

As at December 2009 across the Shire of Wellington there was a total lot stock of rural residential allotments of 4,072. A total of 635.5 hectares of future rural residential land stocks have been identified.

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

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 Shire of Wellington. 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 VIF 2012 indicate that from 2011 to 2031 there will be a total dwelling requirement of 4,664 (233 average per annum). For specific time cohorts average annual dwelling requirements include:

- 2011 to 2016 - 181;
- 2016 to 2021 - 232;
- 2021 to 2026 - 246 and
- 2026 to 2031 - 273.

As measured from 2011 to 2031, the average annual projected demand by SLA within the Shire of Wellington is:

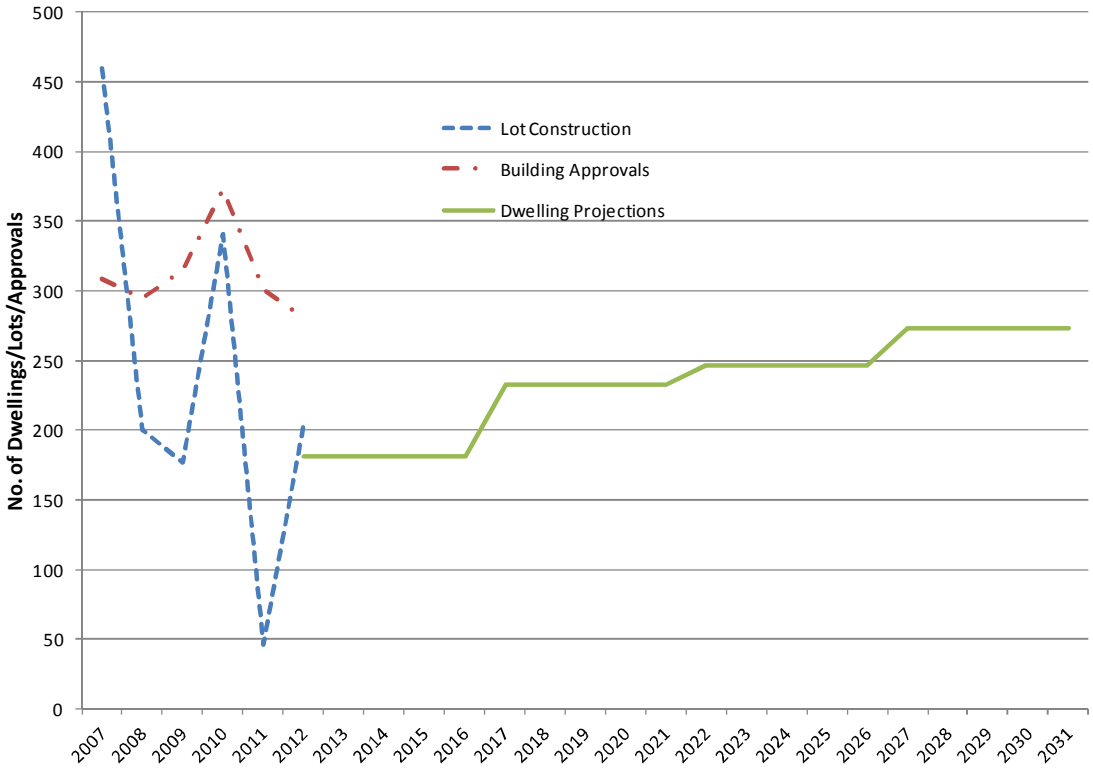
- Alberton: 18 dwellings per annum (e.g. Yarram, Alberton, Port Albert);
- Avon: 22 dwellings per annum (e.g. Stratford, Dargo);
- Maffra: 50 dwellings per annum (e.g. Maffra, Heyfield, Briagolong);
- Rosedale: 50 dwellings per annum (e.g. Cowwarr, Rosedale, Longford); and
- Sale: 93 dwellings per annum (e.g. Sale).

An alternative demand projection has been developed that is based on recent (2006 to 2012) building approval activity – a measure of expressed demand, in conjunction with growth rates identified in the State Governments' projections. In summary, utilising this growth rate scenario results in average dwelling requirements of:

- 2011 to 2016 - 318;
- 2016 to 2021 - 332;
- 2021 to 2026 - 351 and
- 2026 to 2031 - 371.

This growth scenario results in a 45% (2,160 dwellings) increase in total dwelling requirements from 2011 to 2031.

Graph 7: Historic and Projected Demand for Residential Dwellings, 2006 to 2031



Source: *(former) 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 the State Governments Population and Household Projections (Victoria in Future 2012) indicate that from 2011 to 2031 there will be a total dwelling requirement 4,664 (233 average per annum). For specific time cohorts average annual dwelling requirements include:

- *2011 to 2016 - 181;*
- *2016 to 2021 - 232;*
- *2021 to 2026 - 246 and*
- *2026 to 2031 - 273.*

An alternative demand projection has been developed that is based on recent (2006 to 2012) building approval activity – a measure of expressed demand, in conjunction with growth rates identified in the State Governments' projections. In summary, utilising this growth rate scenario results in average dwelling requirements of:

- *2011 to 2016 - 318;*
- *2016 to 2021 - 332;*
- *2021 to 2026 - 351 and*
- *2026 to 2031 - 371.*

This growth scenario results in a 45% (2,160 dwellings) increase in total dwelling requirements from 2011 to 2031.

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). An alternative demand scenario is presented based on historic building approval activity.

Based on historic (July 2006 to June 2012) lot construction activity it is estimated that within the Wellington (S) – Alberton SLA 11% of dwelling requirements were for broadhectare/major infill allotments, 34% within the Wellington (S) – Avon SLA, 21% within the Wellington (S) – Maffra SLA, 9% within the Wellington (S) – Rosedale SLA and 45% within the Wellington (S) - Sale SLA.

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

YEARS OF SUPPLY – *VICTORIA IN FUTURE 2012* DEMAND SCENARIO

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 over 15 years of future demand.

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

- over 15 years: Alberton SLA;
- over 15 years Avon SLA;
- over 15 years: Maffra SLA;
- over 15 years: Rosedale; and
- 14 years: Sale SLA.

In terms of future residential land supply stocks, there is sufficient land to satisfy over 15 years of projected demand across the municipal area, by SLA is sufficient to satisfy:

- 15 years: Maffra;
- over 15 years: Rosedale; and
- over 15 years: Sale.

There are no future (unzoned) residential land stocks in the SLAs of Alberton and Avon.

YEARS OF SUPPLY – HISTORIC TREND BASED DEMAND SCENARIO

In terms of zoned broadhectare/major infill and future (unzoned) residential land stocks it is estimated based on the identified supply and projected demand, there are sufficient land stocks to satisfy over 15 years of future demand.

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

- over 15 years: Alberton SLA;
- over 15 years Avon SLA;
- over 15 years: Maffra SLA;
- over 15 years: Rosedale; and
- 10 years: Sale SLA.

In terms of future residential land supply stocks by SLA is sufficient to satisfy:

- 11 years: Maffra SLA;
- over 15 years: Rosedale; and
- over 15 years: Sale SLA.

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

	VIF2012 Demand Scenario			Historic Trend Scenario		
SLA/LGA	Zoned Stocks	Future Stocks	**Total Stocks**	Zoned Stocks	Future Stocks	**Total Stocks**
Wellington (S) - Alberton	15+	0	**15+**	15+	0	**15+**
Wellington (S) - Avon	15+	0	**15+**	15+	0	**15+**
Wellington (S) - Maffra	15+	15	**15+**	15+	11	**15+**
Wellington (S) - Rosedale	15+	15+	**15+**	15+	15+	**15+**
Wellington (S) - Sale	14	15+	**15+**	10	15+	**15+**
Wellington LGA	**15+**	**15+**	**15+**	**15+**	**15+**	**15+**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

8.0 RESIDENTIAL TABLES

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

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13[1]	Average Lot Production
Wellington (S) - Alberton	***64***	***17***	***10***	***10***	***8***	***7***	***12***	***20***
Alberton (Vic.)	5	2	0	0	0	0	6	**2**
Carrajung	0	0	0	0	0	2	0	**0**
Port Albert	22	1	5	2	1	1	6	**6**
Robertsons Beach	6	0	0	1	1	0	0	**1**
Woodside (Vic.)	4	0	1	3	1	1	0	**2**
Yarram	27	14	4	4	5	3	0	**9**
Wellington (S) - Avon	***20***	***11***	***0***	***8***	***2***	***10***	***0***	***8***
Dargo	4	0	0	1	0	0	0	**1**
Stratford (Vic.)	16	11	0	7	2	10	0	**7**
Wellington (S) - Maffra	***55***	***6***	***7***	***27***	***8***	***5***	***7***	***18***
Briagolong	16	2	0	2	1	2	2	**4**
Coongulla	5	1	1	0	0	0	2	**1**
Glenmaggie	2	0	0	0	1	0	0	**0**
Heyfield	16	1	3	6	4	2	0	**5**
Maffra (Vic.)	13	2	3	15	2	1	1	**6**
Newry	3	0	0	0	0	0	2	**1**
Tinamba	0	0	0	4	0	0	0	**1**
Wellington (S) - Rosedale	***73***	***33***	***7***	***6***	***8***	***14***	***2***	***22***
Cowwarr	0	1	0	1	1	0	0	**0**
Fulham (Vic.)	0	0	0	0	0	1	0	**0**
Gormandale	0	1	0	0	0	0	0	**0**
Loch Sport	49	22	4	1	5	11	0	**14**
Longford (Vic.)	1	0	0	0	0	0	2	**0**
Rosedale (Vic.)	21	8	3	4	2	2	0	**6**
Seaspray	2	1	0	0	0	0	0	**0**
Wellington (S) - Sale	***57***	***36***	***24***	***60***	***8***	***7***	***26***	***34***
Sale	56	36	24	48	7	4	22	**30**
Wurruk	1	0	0	12	1	3	4	**3**
Wellington (S)	**269**	**103**	**48**	**111**	**34**	**43**	**47**	**101**

1: *From July 2011 to December 2012*

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 5: Parent Lot Size of Minor Infill Lot Construction, July 2006 to December 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	10,000+ sqm
Wellington (S) - Alberton	***0***	***1***	***14***	***19***	***27***	***9***	***2***
Alberton (Vic.)	0	0	0	1	3	3	0
Carrajung	0	0	0	0	1	0	0
Port Albert	0	1	2	3	14	1	0
Robertsons Beach	0	0	1	2	2	2	0
Woodside (Vic.)	0	0	0	4	3	1	1
Yarram	0	0	11	9	4	2	1
Wellington (S) - Avon	***0***	***0***	***0***	***2***	***17***	***4***	***5***
Dargo	0	0	0	0	1	1	3
Stratford (Vic.)	0	0	0	2	16	3	2
Wellington (S) - Maffra	***0***	***0***	***9***	***18***	***28***	***7***	***7***
Briagolong	0	0	0	1	8	6	2
Coongulla	0	0	0	6	1	0	0
Glenmaggie	0	0	0	1	1	0	0
Heyfield	0	0	2	7	3	0	3
Maffra (Vic.)	0	0	6	3	11	1	1
Newry	0	0	0	0	3	0	0
Tinamba	0	0	1	0	1	0	1
Wellington (S) - Rosedale	***0***	***0***	***14***	***58***	***29***	***3***	***1***
Cowwarr	0	0	0	1	1	1	0
Fulham (Vic.)	0	0	0	0	0	1	0
Gormandale	0	0	0	0	1	0	0
Loch Sport	0	0	12	49	7	0	0
Longford (Vic.)	0	0	0	0	1	0	1
Rosedale (Vic.)	0	0	2	5	19	1	0
Seaspray	0	0	0	3	0	0	0
Wellington (S) - Sale	***0***	***6***	***56***	***16***	***17***	***1***	***0***
Sale	0	6	53	14	15	1	0
Wurruk	0	0	3	2	2	0	0
Wellington (S)	**0**	**7**	**93**	**113**	**118**	**24**	**15**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

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

SLA/Suburb/LGA	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13[1]	Average Lot Production
Wellington (S) - Alberton	***0***	***0***	***0***	***17***	***0***	***0***	***0***	***3***
Yarram	0	0	0	17	0	0	0	***3***
Wellington (S) - Avon	***54***	***0***	***0***	***0***	***0***	***0***	***0***	***8***
Stratford (Vic.)	54	0	0	0	0	0	0	***8***
Wellington (S) - Maffra	***15***	***10***	***15***	***20***	***0***	***0***	***0***	***9***
Maffra (Vic.)	15	10	15	20	0	0	0	***9***
Wellington (S) - Rosedale	***0***	***0***	***0***	***26***	***0***	***0***	***0***	***4***
Rosedale (Vic.)	0	0	0	26	0	0	0	***4***
Wellington (S) - Sale	***19***	***17***	***46***	***85***	***0***	***100***	***0***	***41***
Sale	19	17	46	85	0	100	0	***41***
Wellington (S)	**88**	**27**	**61**	**148**	**0**	**100**	**0**	***65***

1: *From July 2011 to December 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 2013*

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

SLA/Suburb/LGA	2006- 07	2007- 08	2008- 09	2009- 10	2010- 11	2011- 12	2012- 13[1]
Wellington (S) - Avon	***0***	***2***	***2***	***4***	***4***	***2***	***4***
Cobains	0	2	0	4	4	0	2
Meerlieu	0	0	0	0	0	0	2
Stratford (Vic.)	0	0	2	0	0	2	0
Wellington (S) - Maffra	***0***	***2***	***0***	***2***	***0***	***0***	***2***
Maffra (Vic.)	0	2	0	2	0	0	2
Wellington (S) - Rosedale	***10***	***8***	***6***	***15***	***2***	***4***	***2***
Golden Beach (Vic.)	6	3	6	7	0	4	2
Longford (Vic.)	2	5	0	0	2	0	0
Rosedale (Vic.)	2	0	0	4	0	0	0
Seaspray	0	0	0	4	0	0	0
Wellington (S) - Sale	***27***	***34***	***34***	***5***	***0***	***6***	***8***
Sale	12	3	0	5	0	0	0
Wurruk	15	31	34	0	0	6	8
Wellington (S)	**37**	**46**	**42**	**26**	**6**	**12**	**16**

1: *From July 2011 to December 2012*
Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

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

SLA/Suburb/LGA	2006- 07	2007- 08	2008- 09	2009- 10	2010- 11	2011- 12	2012- 13[1]
Wellington (S) - Alberton	***0***	***6***	***3***	***0***	***0***	***2***	***1***
Devon North	0	0	0	0	0	0	1
Woodside (Vic.)	0	6	3	0	0	2	0
Wellington (S) - Avon	***17***	***2***	***2***	***14***	***0***	***2***	***0***
Briagolong	0	2	0	4	0	0	0
Dargo	0	0	0	4	0	0	0
Stratford (Vic.)	17	0	2	6	0	2	0
Wellington (S) - Maffra	***30***	***6***	***17***	***25***	***2***	***27***	***4***
Briagolong	17	4	0	0	0	9	0
Glenmaggie	5	0	4	0	0	0	0
Heyfield	6	0	0	16	0	11	4
Maffra (Vic.)	2	0	13	7	2	0	0
Seaton (Vic.)	0	2	0	2	0	7	0
Wellington (S) - Rosedale	***19***	***10***	***4***	***17***	***4***	***19***	***11***
Longford (Vic.)	5	8	2	15	4	15	9
Rosedale (Vic.)	0	0	0	0	0	4	0
Wurruk	14	2	2	2	0	0	2
Wellington (S)	**66**	**24**	**26**	**56**	**6**	**50**	**16**

1: *From July 2011 to December 2012*
Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

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

Suburb/SLA/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
Wellington (S) - Alberton	***0***	***46***	***42***	***29***	***23***	***5***	***145***
Alberton (Vic.)	0	1	2	4	2	1	**10**
Carrajung	0	0	0	0	2	0	**2**
Port Albert	0	6	23	14	10	0	**53**
Robertsons Beach	0	4	12	7	6	1	**30**
Woodside (Vic.)	0	35	5	4	3	3	**50**
Wellington (S) - Avon	***0***	***4***	***12***	***7***	***18***	***5***	***46***
Dargo	0	0	0	0	3	2	**5**
Munro	0	0	0	1	2	1	**4**
Stratford (Vic.)	0	4	12	6	13	2	**37**
Wellington (S) - Maffra	***17***	***50***	***41***	***17***	***33***	***8***	***166***
Briagolong	0	2	2	10	19	4	**37**
Coongulla	0	19	2	2	0	0	**23**
Glenmaggie	1	6	2	3	1	1	**14**
Heyfield	3	9	5	1	4	1	**23**
Maffra (Vic.)	13	14	29	1	7	2	**66**
Newry	0	0	0	0	2	0	**2**
Tinamba	0	0	1	0	0	0	**1**
Wellington (S) - Rosedale	***4***	***548***	***125***	***36***	***20***	***2***	***735***
Cowwarr	0	2	6	5	1	0	**14**
Fulham (Vic.)	0	0	0	0	2	0	**2**
Gormandale	0	0	3	0	0	0	**3**
Loch Sport	3	540	55	24	7	0	**629**
Rosedale (Vic.)	0	1	48	5	9	2	**65**
Seaspray	1	5	13	2	1	0	**22**
Wellington (S) - Sale	***14***	***57***	***38***	***9***	***7***	***0***	***125***
Sale	14	47	35	9	7	0	**112**
Wurruk	0	10	3	0	0	0	**13**
Wellington (S)	**35**	**705**	**258**	**98**	**101**	**20**	**1,217**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

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

SLA/Suburb/LGA	1-2 years	3-5 years	6-10 years	11+ years	No Timing[1]	Total Zoned Stocks	Future (unzoned)	Total Lots (zoned/un-zoned)
Wellington (S) - Alberton	***0***	***0***	***0***	***0***	***172***	***172***	***0***	**172**
Alberton (Vic.)	0	0	0	0	2	***2***	0	**2**
Robertsons Beach	0	0	0	0	20	***20***	0	**20**
Yarram	0	0	0	0	150	***150***	0	**150**
Wellington (S) – Avon[2]	***36***	***86***	***72***	***265***	***156***	***615***	***0***	***615***
Stratford (Vic.)	36	86	72	265	156	***615***	0	**615**
Wellington (S) - Maffra	***90***	***36***	***75***	***0***	***290***	***491***	***164***	***655***
Heyfield	8	0	0	0	203	***211***	164	**375**
Maffra (Vic.)	82	36	75	0	87	***280***	0	**280**
Wellington (S) – Rosedale[3]	***110***	***29***	***280***	***0***	***73***	***492***	***900***	***1,392***
Longford (Vic.)	16	0	0	0	0	***16***	600	**616**
Rosedale (Vic.)	0	29	90	0	65	***184***	300	**484**
Seaspray	0	0	0	0	8	***8***	0	**8**
Stradbroke	94	0	190	0	0	***284***	0	**284**
Wellington (S) - Sale	***80***	***319***	***180***	***0***	***41***	***620***	***3,400***	***4,020***
Sale	69	319	180	0	25	***593***	1,200	**1,793**
Wurruk	11	0	0	0	16	***27***	2,200	**2,227**
Wellington (S)	**316**	**470**	**607**	**265**	**732**	***2,390***	**4,464**	**6,854**

1: *The no timing status identifies potential broadhectare land stocks but do not attempt to estimate potential development timing.*
2*: A total of 168 hectares (1,300 lots) designated Future Residential technically located within the Rosedale SLA, however functionally is supply for urban area of Sale (suburbs of Sale and Wurruck) and has been classified to be located in the Sale SLA to match with the demand projections.* ***3****: A total of 150 hectares (1,110 lots) designated Future Residential and 43 hectares (397 lots) of zoned residential land technically located in the Avon SLA, however functionally is supply for urban area of Sale and has been classified to be located in the Sale SLA to match with the demand projections.*
Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

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

SLA/Suburb/LGA	Area (ha)	No. of Lots
Wellington (S) - Alberton	***20.92***	***13***
Port Albert	7.16	6
Robertsons Beach	13.76	7
Wellington (S) - Avon	***37.24***	***23***
Dargo	8.7	6
Munro	0.92	2
Stratford (Vic.)	27.62	15
Wellington (S) - Maffra	***12.53***	***9***
Briagolong	1.01	1
Glenmaggie	2.61	2
Maffra (Vic.)	4.83	3
Newry	4.08	3
Wellington (S) - Rosedale	***18.78***	***5***
Cowwarr	17.27	4
Longford (Vic.)	1.51	1
Wellington (S)	**89.47**	**50**

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 2013*

Table 12: Future Rural Residential Stock (Hectares), 2012

SLA/Suburb/LGA	LDRZ	RLZ	Total Area (ha)
Wellington (S) - Maffra	***12.93***	***0***	***12.93***
Heyfield	12.93	0	12.93
Wellington (S) - Rosedale	***88.27***	***534.3***	***622.57***
Longford (Vic.)	0	337.53	337.53
Rosedale (Vic.)	0	79.58	79.58
Stradbroke	0	117.19	117.19
Wurruk	88.27	0	88.27
Wellington (S)	**101.20**	**534.3**	**635.50**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 13: Occupied and Vacant Rural Residential Lot Stock by Zone Type, 2009

	LDRZ				RLZ			
Suburb/SLA/LGA	Vacant	Occupied	Vacancy Rate (%)	Total Lots	Vacant	Occupied	Vacancy Rate (%)	Total Lots
Wellington (S) - Alberton	***35***	***37***	***49%***	***72***	***19***	***124***	***13%***	***143***
Carrajung	0	0	0%	**0**	1	4	20%	**5**
Devon North	0	0	0%	**0**	5	42	11%	**47**
Won Wron	0	0	0%	**0**	4	20	17%	**24**
Woodside (Vic.)	32	29	52%	**61**	6	43	12%	**49**
Yarram	3	8	27%	**11**	3	15	17%	**18**
Wellington (S) - Avon	***37***	***49***	***43%***	***86***	***34***	***201***	***14%***	***235***
Briagolong	0	0	0%	**0**	14	28	33%	**42**
Bundalaguah	0	0	0%	**0**	0	10	0%	**10**
Cobains	7	19	27%	**26**	0	0	0%	**0**
Dargo	0	0	0%	**0**	3	2	60%	**5**
Licola	0	0	0%	**0**	2	0	100%	**2**
Meerlieu	18	9	67%	**27**	0	0	0%	**0**
Munro	8	3	73%	**11**	1	2	33%	**3**
Sale	0	4	0%	**4**	0	5	0%	**5**
Stratford (Vic.)	4	14	22%	**18**	14	154	8%	**168**

Continued next page

Table 13: *continued*

Suburb/SLA/LGA	LDRZ				RLZ			
	Vacant	Occupied	Vacancy Rate (%)	Total Lots	Vacant	Occupied	Vacancy Rate (%)	Total Lots
Wellington (S) - Maffra	***1***	***23***	***4%***	***24***	***118***	***404***	***23%***	***522***
Briagolong	0	0	0%	**0**	18	58	24%	**76**
Coongulla	0	0	0%	**0**	10	27	27%	**37**
Glenmaggie	0	0	0%	**0**	19	85	18%	**104**
Heyfield	0	0	0%	**0**	36	107	25%	**143**
Maffra (Vic.)	1	23	4%	**24**	25	85	23%	**110**
Seaton (Vic.)	0	0	0%	**0**	10	42	19%	**52**
Wellington (S) - Rosedale	***1,494***	***841***	***64%***	***2,335***	***62***	***287***	***18%***	***349***
Glengarry (Vic.)	0	0	0%	**0**	0	9	0%	**9**
Golden Beach (Vic.)	1,115	650	63%	**1,765**	0	0	0%	**0**
Gormandale	0	0	0%	**0**	8	7	53%	**15**
Longford (Vic.)	363	165	69%	**528**	47	183	20%	**230**
Rosedale (Vic.)	3	12	20%	**15**	2	56	3%	**58**
Seaspray	13	14	48%	**27**	0	0	0%	**0**
Wurruk	0	0	0%	**0**	5	32	14%	**37**
Wellington (S) - Sale	***54***	***159***	***25%***	***213***	***0***	***93***	***0%***	***93***
Sale	14	40	26%	**54**	0	93	0%	**93**
Wurruk	40	119	25%	**159**	0	0	0%	**0**
Wellington (S)	**1,621**	**1,109**	**59%**	**2,730**	**233**	**1,109**	**17%**	**1,342**

Source: *Spatial Economics Pty Ltd and (former) Department of Planning and Community Development 2013*

Table 14(a): Estimated and Projected Population, 2011 to 2031

	Estimated Resident Population				
SLA/LGA	2011	2016	2021	2026	2031
Wellington (S) - Alberton	5,642	5,737	5,738	5,766	5,814
Wellington (S) - Avon	4,444	4,565	4,721	4,881	5,057
Wellington (S) - Maffra	11,043	11,156	11,410	11,717	12,061
Wellington (S) - Rosedale	8,009	8,157	8,424	8,720	9,085
Wellington (S) - Sale	14,782	15,128	15,720	16,391	17,259
Wellington LGA	**43,920**	**44,742**	**46,013**	**47,475**	**49,276**

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

Table 14(b): Estimated and Projected Number of Dwellings, 2011 to 2031

	Structural Private Dwellings				
SLA/LGA	2011	2016	2021	2026	2031
Wellington (S) - Alberton	3,138	3,216	3,299	3,393	3,492
Wellington (S) - Avon	1,790	1,877	1,991	2,107	2,229
Wellington (S) - Maffra	4,864	5,054	5,304	5,580	5,869
Wellington (S) - Rosedale	4,954	5,156	5,423	5,682	5,954
Wellington (S) - Sale	6,449	6,799	7,247	7,735	8,316
Wellington LGA	**21,196**	**22,103**	**23,264**	**24,496**	**25,860**

Source: *(former) 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 2031

	Estimated Resident Population					Structural Private Dwellings				
SLA/LGA	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031
Wellington (S) - Alberton	19	0	6	10	9	16	16	19	20	18
Wellington (S) - Avon	24	31	32	35	31	17	23	23	24	22
Wellington (S) - Maffra	23	51	62	69	51	38	50	55	58	50
Wellington (S) - Rosedale	30	53	59	73	54	40	53	52	55	50
Wellington (S) - Sale	69	118	134	174	124	70	90	98	116	93
Wellington LGA	**164**	**254**	**292**	**360**	**268**	**181**	**232**	**246**	**273**	**233**

Source: *(former) 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 2031

	Estimated Resident Population					Structural Private Dwellings				
SLA/LGA	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031	2011 to 2016	2016 to 2021	2021 to 2026	2026 to 2031	2011 to 2031
Wellington (S) - Alberton	0.3%	0.0%	0.1%	0.2%	0.2%	0.5%	0.5%	0.6%	0.6%	0.5%
Wellington (S) - Avon	0.5%	0.7%	0.7%	0.7%	0.6%	1.0%	1.2%	1.1%	1.1%	1.1%
Wellington (S) - Maffra	0.2%	0.5%	0.5%	0.6%	0.4%	0.8%	1.0%	1.0%	1.0%	0.9%
Wellington (S) - Rosedale	0.4%	0.6%	0.7%	0.8%	0.6%	0.8%	1.0%	0.9%	0.9%	0.9%
Wellington (S) - Sale	0.5%	0.8%	0.8%	1.0%	0.8%	1.1%	1.3%	1.3%	1.5%	1.3%
Wellington LGA	**0.4%**	**0.6%**	**0.6%**	**0.7%**	**0.6%**	**0.8%**	**1.0%**	**1.0%**	**1.1%**	**1.0%**

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

LOCATION OF SUBURBS AND STATISTICAL LOCAL AREAS - WELLINGTON

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 is 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.

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.