TOOWOOMBA RESIDENTIAL LAND SUPPLY ASSESSMENT

THE BUSINESS VERDICT & BLUEPRINT

PREPARED FOR: TOOWOOMBA CHAMBER

MARCH 2022

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TABLE OF CONTENTS

1.0 INTRODUCTION

The available supply of broadhectare residential land in the greater Toowoomba area has rapidly emerged as a critical land use and development issue threatening the continue economic and social prosperity of the region.

Within a climate of high demand, constrained residential land supply and rapidly declining rental vacancy, there have been unified and persistent calls from the business community and development industry for Toowoomba Regional Council to take urgent steps to increase the supply of available broadhectare residential land.

The significance of providing a sufficient supply of residential land cannot be understated. It:

- underpins regional economic growth and competitiveness;
- is critical to business attraction and employment;
- is a key determinant of housing affordability;
- is essential to ensuring market choice and competition; and
- is fundamental to maintaining a stable rental sector.

The purported shortage of available residential land is a matter that has been actively contested by Toowoomba Regional Council since the release of Precinct Urban Planning's Broadhectare Residential Land Supply Assessment in 2017. This assessment highlighted at that time, the limited practical capacity of zoned residential areas and the rapidly eroding supply of available land.

Since 2017, a multitude of technical assessments by technical practitioners and nationally recognised property experts including Michael Matusik (Matusik Property Insights), Tim Lawless (Core Logic) and Terry Ryder (Hotspotting – "*The Australian*") have all concluded that Toowoomba has a significant land supply problem.

Two further technical assessments commissioned by Council[1] both confirmed rather than dispelled the business community and development industry's concerns that Toowoomba has a critically limited supply of available residential land, with this problem identified as being specifically pronounced in the short to medium term.

Collectively, the alternate position that Toowoomba had a plentiful supply of unconstrained residential land was found to not be credible and was not supported by available evidence.

Notwithstanding the weight of evidence to the contrary, a report addressing Short Term Residential Land Supply was presented to Council's Planning and Development Committee on 10th August 2021.

Among other findings, this report concluded that there:

- was twenty – seven (27) year's supply of residential land; and
- 4300 approved residential lots.

[1] Being those undertaken by PSA Consulting and the National Property Research Company

Considering the weight of evidence to the contrary, the business community and development industry requested that two maps be provided by Council illustrating the location of the purported twenty seven (27) year's supply of residential land and 4300 approved lots.

In October 2021, the Toowoomba Regional Council provided a single map titled "Greenfield Residential Land Supply" purportedly showing areas comprising 27 years supply of available greenfield residential land. Despite being requested, no mapping showing the location of the 4300 lots was provided.

In October 2021, the Toowoomba Chamber engaged Precinct Urban Planning to undertake a detailed appraisal and fine grain review of the mapping provided. The key focus of this review was to assess the practical availability of land for residential development having regard to physical regulatory and environmental constraints.

The following report details:

- The findings of that review;
- The outcomes and implications of a subsequent audit of broadhectare land stock by Toowoomba Regional Council; and
- Potential town planning solutions to address the land supply shortage.

2.0 ASSESSMENT OF GREENFIELD LAND SUPPLY AREAS

The assessment of Council identified greenfield residential land supply areas was completed with results being presented to the Toowoomba Chamber Breakfast Briefing on Thursday 9th December 2021.

The presentation titled ***"27 Years Residential Land Supply? – The Business Verdict"*** is included as **Appendix A**.

The key focus of the review undertaken was to assess the practical availability of land for residential development having regard to physical, regulatory, and environmental constraints. The review focussed on "hard constraints" being those factors that typically preclude development, rather than "soft constraints" that do not preclude development but make it more difficult, with consequential impacts on development yield and/or scale.

The assessment mapped the following hard constraints over identified areas of residential land purportedly available for future development:

- Land already developed or allocated to a non-urban use;
- Extractive Industry separation and haulage route buffers;
- Flood liable areas;
- Areas of excessive slope (>15%); and
- Core Koala Habitat

While the key findings of the analysis were summarised in the presentation, an initial estimate by Council of four hundred and fifty (450) allotments available for sale (subsequently revised down to 365 allotments) was incorrect and was found in fact to total only ninety-four (94) allotments.

3.0 COUNCIL LAND SUPPLY AUDIT

3.1 SUMMARY

After follow-up meetings between Council, the Chamber and Development Industry Groups[2] in December 2021 and February 2022, Council officers undertook an audit of the "Development Pipeline" in March 2022.

The Council audit concluded that there:

- were 2740 allotments in the development pipeline;
- 2,341 of these allotments were inside the Priority Infrastructure Area (PIA) with the remainder (399 lots) being outside the PIA;
- only 359 allotments had operational works approval;
- of those construction had only commenced on only250 allotments; and
- only 79 allotments were under assessment for plan sealing.

3.2 CRITICAL ANALYSIS

Based on the audit mapping and figures provided by Council the following observations are made:

- Of the 2740 allotments identified in the development pipeline, 900 allotments are in RAL[3] applications under assessment. These are not reasonably part of available supply as they have not been approved.
- Similarly, a further 112 allotments are already sealed, and consequently have already been consumed and are not reasonably part of available allotment supply.
- This leaves a total of 1728 allotments.
- Of the 1728 lots which remain, troubled or "zombie" estates being "Essence" (123 lots), "Park Hill" (113 lots) and "Gainsborough Hills" (314 lots) account for a combined total of 550 allotments. These estates are either problematic to develop, for example due to critical infrastructure constraints, or have been demonstrated to be unattractive to the market with historically low rates of market consumption (take up). They are clearly indicative of a mismatch between demand and supply, and In practical terms comprise market failures.
- Further estates including a combined total of 195 lots being "Santana" (43 lots), "Wattle Grove" (22 lots), Kearney West (42 Lots), Middle Ridge (42 lots), "Kooringa Valley" (46 lots)

[2] The UDIA and Advance Toowoomba
[3] Reconfiguring a Lot

represent allotments that while not sealed or constructed, have been sold or pre-committed under contract and will not be made available to the market.

- This reduces the practical allotment supply to approximately 1000 allotments.
- A healthy broadhectare residential market relies on:
    - a rolling supply of approximately five (5) year's supply of allotments which in Toowoomba's case equates to approximately 4000 allotments;
    - a spatially diverse distribution of available supply over multiple development fronts to ensure market "choice" and "competition";
    - a progressively replenished 10 -15 year supply of land being maintained within the Priority Infrastructure Area (PIA). This equates to an unconstrained and practically available supply of land having the capacity to deliver between 8000 -12,000 allotments based on agreed average annual demand.
- Council, the Chamber and Development Industry Groups[4] have previously agreed that an average supply of 800 allotments is required to meet typical annual demand.
- A practical supply of 1000 allotments is representative of approximately only 14 months of broadhectare residential land supply.
- Excluding RAL[5] development applications under assessment, 637 allotments or a disproportionately high 63.7% of the remaining available allotment supply is located in the Highfields/Meringandan area.
- Relying on Council supplied allotment figures (prior to ground truthing and adjustments previously outlined) 399 or 14.6% of the purportedly available 2740 lots are located outside the PIA. This is indicative of insufficient land supply within the PIA necessitating land being required to be developed outside the PIA, and a misalignment of Council land use and infrastructure planning.

3.3 KEY IMPLICATIONS

- In 2021 the elected Council was advised by its officers that that there was 27 years supply of broadhectare residential land and 4300 approved allotments. The presentation titled ***"27 Years Residential Land Supply? – The Business Verdict"*** and the research it presented to the Toowoomba Chamber Breakfast on 9th December 2021, critically discredited the validity of the previous claim that the greater Toowoomba City area had 27 years supply of greenfield residential land. Evidence outlined in that presentation clearly showed that much of the land purportedly available for future greenfield residential development was not available due already being developed, or by virtue of one or a combination of physical, environmental or regulatory constraints.

[4] The UDIA (QLD) and Advance Toowoomba
[5] Reconfiguring a Lot

- The secondary claim was that there were 4300 approved residential allotments. It appears that estimate was derived from the Council commissioned report by the National Property Research Co titled *"Toowoomba Urban Extent – Housing Need Analysis"* (May 2021). This appears to have been derived from a reference in that report which referred to *"a development pipeline of 4320 subdivision lots…"*. As was noted in the Chamber presentation references to lots in the "development pipeline" are in no way synonymous with "approved lots". This is a significant and critical misinterpretation of the findings of referenced analysis. Incorrectly referencing and relying on a development pipeline estimate as being equivalent to an estimate of approved lots fundamentally misrepresents the reality and severity of the critical allotment undersupply that has been found to exist.
- As of February 2022, there is in fact 1728 approved lots[6]. Factoring in market, environmental, infrastructure and regulatory constraints, practical supply is more like approximately 1000 lots or 14 months of available allotment stock. The information previously provided to Council is incorrect and misleading.
- The State Government Statistician estimates it has an approved allotment stock of approximately 3000 allotments. The State relies on Council for its statistics on approved/available allotment stock. The information provided to the State Government Statistician is incorrect and misleading.
- The spatial distribution of practically available allotment stock is inextricably skewed in favour of Highfields/Meringandan development front which accounts for approximately 63.7 % of practically available allotment stock. The disproportionately high concentration of available supply in one development front markedly reduces healthy market competition and significantly detracts from market choice.
- The Priority Infrastructure Area (PIA) must by law make provision for between 10-15 years supply of residential land. The PIA is intended to be reviewed regularly[7] in response to growth to ensure a continuous 10 -15 year supply of land is maintained. The Toowoomba PIA has not changed since its introduction in 2012. The progressive erosion of land supply within a static PIA, increases the requirement for land to be developed outside the PIA to respond to demand. This results in the artificial and unnecessary escalation in development costs that are ultimately passed on to the end consumer, with consequentially negative impacts on housing affordability. More critically, artificially escalated development costs associated with development outside the PIA, have made sizeable projects capable of significantly augmenting allotment supply commercially unviable.
- In December 2021 the elected Council was advised to adopt a Growth Management Strategy disproportionately focussed on infill development at the expense of expanding broadhectare land supply. While the decision to adopt this strategy was ultimately deferred, had it been made the consequences would, in our opinion, have been disastrous.
- Even critical and targeted efforts to rebuild available allotment stock to healthy market levels will take in our estimation between 10 -15 years assuming for example, an additional

[6] Does not include lots under RAL assessment as these have not been approved, or lots previously sealed as these have already been consumed.
[7] Annually or biannually

supply of 200 lots (or 25% of annual demand) over and above and average demand of 800 lots / annum is provided annually over that period.

- Significantly, certain regulatory constraints provide significant barriers to market entry. These include a high proportion of land within the Emerging Community Zone, which mitigates against the achievement of timely and cost effective development approval required to achieve accelerated rates of broadhectare allotment supply supplementation. Typically, convoluted assessment processes, lengthy timeframes, and high assessment and compliance costs have thwarted the establishment of integrated and master planned communities capable of delivering substantial allotment supply. As an example, timeframes alone have typically ranged between 3-6 plus years and are a major impediment to the augmentation of available allotment stock.
- We have previously noted that critical findings contained within the Council commissioned specialist assessments of land supply[8] have either been misinterpreted or overlooked in arriving at a factual basis for estimating practically available residential land supply. In addition to the misinterpretation of the National Property Co. Report finding relevant to approved lots, it is equally pertinent to note that the findings of the PSA Consulting report titled "*Residential Land Supply: Short Term Supply Snapshot*" (2021) clearly and unambiguously noted:
    - The supply of land residential development in the short term represented a legitimate challenge having regard to growth projections;
    - That there was a need to prioritize planning to bring areas identified for future urban development into urban zones, particularly those areas so identified under the Strategic Framework of the Planning Scheme;
    - That infrastructure servicing solutions that are facilitative of enabling short term land supply are adopted in prioritized urban growth areas;
    - The need to prioritize the resolution of applications and planning appeals where the intent of the Strategic Framework is met (i.e., within the urban footprint and identified future growth areas;
    - Investigate "fast track" processes for low-risk development applications;
    - Utilise real estate and sales data to confirm the extent and severity of land supply issues to understand the challenges of short term land supply more deeply.
- In all respects, the most recent findings of Council's belated audit of available land supply unequivocally confirm rather than dispel the legitimate concerns of the development industry in respect of the critical land supply shortage. Even in the absence of ensuing research and analysis, the considered, accurate and objective interpretation of the specialist reports previously commissioned by Council and completed approximately 12 months ago, echo identical concerns.

[8] Including PSA Consulting "*Residential Land Supply: Short Term Supply Snapshot*" (2021) and National Property Research Co *"Toowoomba Urban Extent – Housing Need Analysis"* (2021).

4.0 THE BLUEPRINT – POTENTIAL SOLUTIONS

4.1 INTRODUCTION

Toowoomba is experiencing a critical land supply and housing crisis. While broader market trends at the national and state levels have contributed to this situation, it is undeniable in our view that the regional housing crisis is being significantly compounded and worsened by the prolonged erosion and undersupply of broadhectare residential land. This has resulted in a critical shortage of available residential land relative to demand, it has destabilised the rental market and is having significant adverse impact on housing affordability.

Outside of broad national and state trends, the residential land supply shortage is essentially one of Toowoomba Regional Council's making, and one which they can resolve through political will and proactive policy initiatives. Notwithstanding progressive expansion in the SEQ Regional Plan's urban footprint, the designation (zoning) and release of land for broadhectare residential development has been purposefully and artificially constrained, resulting in critical land supply deficiency in a climate of elevated and sustained demand. Physical, environmental, and regulatory constraints have further depleted available land supply, or the ability of the development industry to deliver land to the market in a timely and cost effective manner.

Unnecessarily protracted and onerous assessment processes, a propensity to litigate rather than facilitate land release, and artificially constraining the expansion of the Priority Infrastructure Area (PIA) have collectively conspired to significantly deplete and constrain available land supply. Major development projects capable of substantially augmenting supply have been unnecessarily complicated, delayed, litigated and in several notable instances abandoned to the economic detriment of the region. Related implications have materialised in the form of declining housing and rental affordability, social dislocation and increasing homelessness.

The severity of the region's current residential and housing supply shortage is such that its ability to be remedied in the short to medium term is limited even with targeted and urgent market intervention. Available measures however can make a meaningful contribution over the medium to long term to rectify supply deficiencies and achieve a more appropriate balance between demand and supply.

We recommend the Toowoomba Chamber in association with Development Industry Groups[9] urgently pursue and secure Council commitment to the following planning and development initiatives to address existing critical land supply shortage and to lessen the adverse implications, both economic and social, of the regional housing crisis.

[9] The UDIA and Advance Toowoomba

4.2 LAND USE, REGULATORY & DEVELOPMENT RESPONSES

4.2.1 EXPANSION OF PRIORITY INFRASTRUCTURE AREA (PIA)

The Priority Infrastructure Area (PIA) under the Toowoomba Regional Planning Scheme has not changed since its introduction in 2012.

Pursuant to the requirements of the *Planning Act 2016*, the PIA must, at all times, include between 10 and 15 years supply of residential land supported by the prioritised provision of trunk urban infrastructure.

The PIA is a cost apportionment mechanism rather than a development staging mechanism. Development is not precluded outside the PIA but may, and typically is, subject to additional (including "bring forward") trunk infrastructure contributions where development results in additional and unforeseen/unplanned demand.

The progressive erosion in broadhectare land supply over the last ten (10) years within the PIA has not been matched by commensurate and progressive expansion in the PIA boundary to maintain the requisite 10-15 year supply. As previously noted, the PIA has not been expanded since its adoption in 2012, while at the same time available land supply stock within the PIA has been progressively consumed in line with growth.

A static PIA boundary contributes to unnecessary and artificial escalation in the cost to develop land that now increasingly is and will need to occur outside the PIA boundary. In many cases this makes development not economically viable. Had the PIA boundary been reviewed on an annual basis and progressively expanded in response to growth, many of the areas now required for development would have been included within the PIA, thereby significantly reducing development costs, which are ultimately passed on to the end consumer of land.

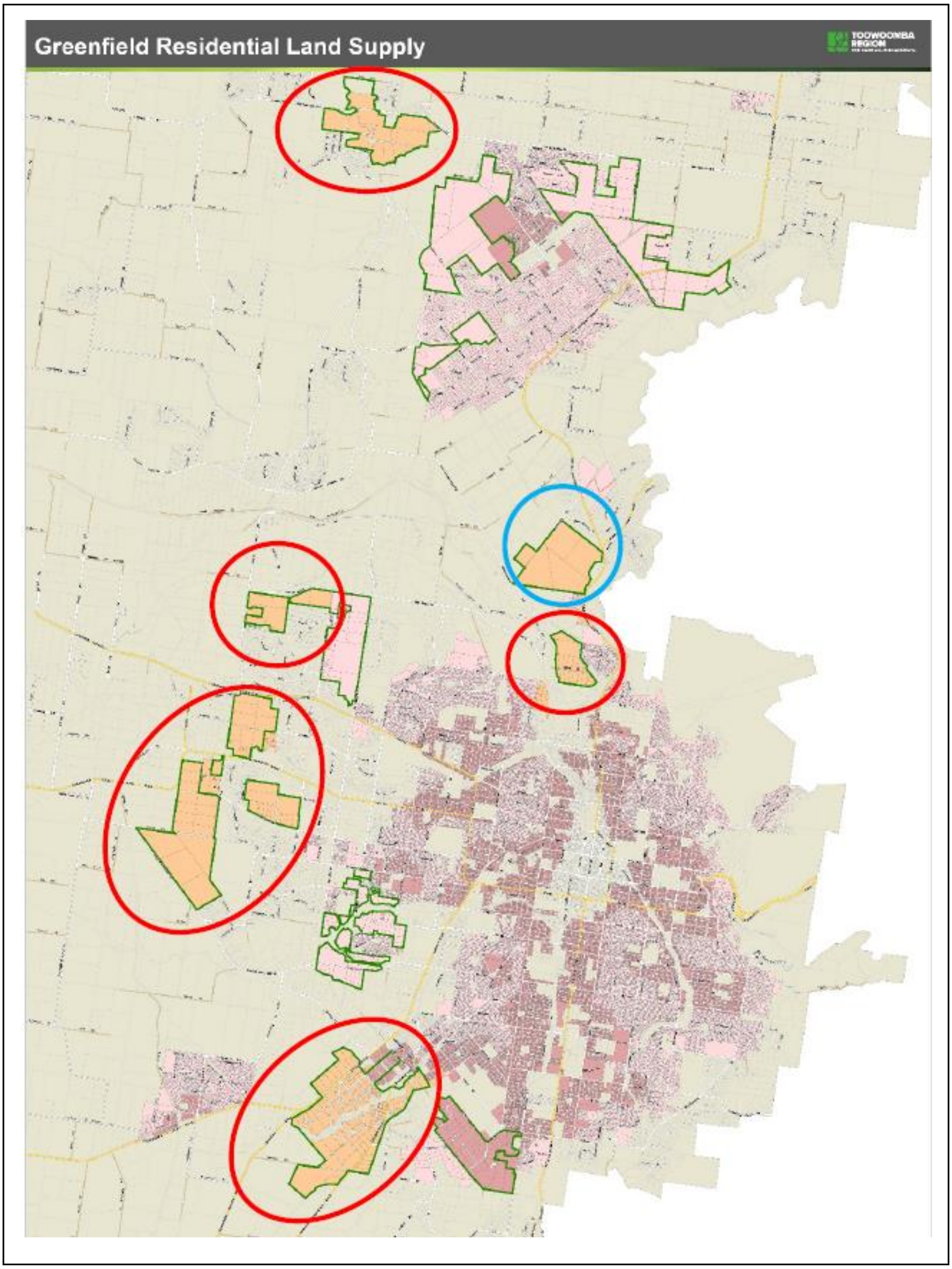
The abandonment of projects based on artificially escalated and uneconomic infrastructure costs not only curtails economic growth and reduces practical land supply, but deprives the community of even reasonable contributions towards the expansion of trunk infrastructure networks. Infrastructure charges are only payable if development occurs.

It is recommended that the PIA boundary is immediately expanded to include those areas within the Urban Footprint under the SEQ Regional Plan, and that infrastructure planning and provision is prioritised accordingly.

4.2.2 TEMPORARY LOCAL PLANNING INSTRUMENT (TLPI) – PRIORITY GROWTH AREAS

A key regulatory restriction curtailing the practical supply and timely delivery to the market of broadhectare residential land arises from the significant proportion of available greenfield residential land that is included in the Emerging Community Zone under the Toowoomba Planning Scheme 2012. The proportion of identified greenfield residential expansion areas included in the Emerging Community Zone are illustrated in **Figure 1 – Emerging Community Zoned Greenfield Land.**

FIGURE 1 - EMERGING COMMUNITY ZONED GREENFIELD LAND.



The Emerging Community Zone is best characterised as a "future urban" or holding zone that identifies land suitable for future urban development subject to urban master planning and strategic infrastructure planning. Use rights are restrictive and a minimum allotment size of 15 hectares applies to land included in this zone.

To render the land suitable for physical development, a preliminary approval including a variation request is required to effectively "rezone" the land and put planning and development controls in place conducive to its development for urban purposes.

These applications are typically made as a prerequisite to subsequent applications for development permits to subdivide and develop land. While combining preliminary approval and development permit applications is not precluded under planning legislation, preliminary approvals including variation requests for major master planned developments are typically pursued in isolation to "de-risk" projects and resolve broader strategic issues prior to seeking development permits for the physical development of land and addressing areas of detailed design.

Experience in the Toowoomba Regional Council area has, however, shown assessment and approval processes for preliminary approvals for variation requests[10] to be an inordinately lengthy, difficult, and costly process. Several applications for significant projects have been fruitless and have ultimately been abandoned. Others have resorted to litigation as means of bringing preliminary approval processes to a reasonable conclusion after lengthy and uncompleted assessment processes.

Removing the need for a preliminary approval to be pursued as a prerequisite to applications for development permits authorising the physical development of land is a key impediment to the timely delivery of major projects, and ultimately the efficient provision of adequate greenfield land supply.

The *Planning Act 2016* provides a local government with the ability to prepare a Temporary Local Planning Instrument (TLPI) to respond to emerging and critical planning issues which justify urgent policy intervention. Generally, a TLPI is an interim response that is put in place quickly to set out planning and development assessment policies to protect all or part of a local government area from adverse impacts in urgent or emergent circumstances.

A TLPI has the practical effect of suspending the operation of relevant provisions of the planning scheme for a maximum period of two (2) years pending the enactment of planning scheme amendments. The TLPI prevails over the planning scheme to the extent of any inconsistency while it has force and effect.

A TLPI for priority urban growth areas could be used to put provisions in place to effectively rezone and treat Emerging Community zoned land as though it was included in the Low Density Residential Zone and within the PIA.

This would have the immediate effect of removing the need to first make application for a preliminary approval before development permits facilitating the physical development of the land could proceed. It would not preclude concurrent urban master planning and infrastructure planning and would de-risk the ensuing land development process. The inclusion of all or some[11] of

[10] Previously referred to as Preliminary Approval Varying the Effect of the Planning Scheme under the now repealed *Sustainable Planning Act 2009*
[11] Being those also included in the Urban Footprint of the SEQ Regional Plan

the areas so zoned in the PIA, would further remove a significant artificial and contrived financial impediment to the economically feasible development of such areas.

4.2.3 AMENDMENT OF PLANNING SCHEME

The adoption of a TLPI would be a precursor to initiating a formal process of Planning Scheme amendments giving practical effect to the temporary zoning and assessment provisions changes embodied in the TLPI.

Under such amendments areas within the Urban Footprint of the SEQ Regional Plan would be included in the Low Density or Low Medium Density Zone under the Toowoomba Regional Planning Scheme 2012. The timeframe for the preparation of the new Planning Scheme is unusually protracted[12] such that deferring these changes until the new planning scheme is in effect is not appropriate or recommended.

4.2.4 MAJOR PROJECT FACILITATION & APPEAL RESOLUTION

The propensity to over regulate, over prescribe and concentrate on matters of detailed design in the early stages of major project assessment has resulted in significant delays in the fruitful realisation of major residential development projects.

Often after lengthy assessment processes, the only recourse for development proponents is to initiate litigation in the Planning & Environment Court. Rather than relying on the Court process to deliver a timelier development assessment outcome, Toowoomba Regional Council has sought to actively contest such appeals to the detriment of not only development proponents but also regional land supply and infrastructure provision.

It is noteworthy that only one major master planned residential community (Habitat – Mt Kynoch) has been approved in the last 5 years. Over the same period two major master planned communities facilitating a combined supply in excess of 2000 allotments have been abandoned. A further integrated community with the prospect of delivering between 800 – 1000 lots is being needlessly delayed in litigation.

In many cases such developments are consistent with Council's forward planning strategy and in many cases within the PIA. A focus on expediting and resolving appeals of this nature is critical in increasing residential land supply particularly in the short to medium term.

The quantum of direct and indirect commercial investment and the economic contribution made by such projects is immense, and the need to actively facilitate them through efficient assessment, and the focussed and timely resolution of litigation is critical.

Ultimately capital is mobile. A Local Government's reputation and preparedness to ensure major projects are actively facilitated through the assessment process, and efficiently litigated (only where necessary) is critical to the future attraction of major residential investment to the region.

12 With the review process taking a minimum of five (5) years not being likely to conclude to 2025-26

It is recommended that suitable external expertise and experience is sought to assess and determine future applications for master planned communities, and that the timely resolution of litigation through settlement is urgently facilitated by Toowoomba Regional Council.

Andrew Bullen
Director
Precinct Urban Planning
30 March 2022

APPENDIX A: PRESENTATION SLIDES – 27 YEARS LAND SUPPLY? – THE BUSINESS VERDICT – 9TH DECEMBER 2021

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27 YEARS RESIDENTIAL LAND SUPPLY ?

The Business Verdict

Toowoomba Chamber – Thursday 9th December 2021



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Outline

- **Residential land supply – rapidly emerged as the most important land use and development issue threatening the continued economic and social prosperity of the Toowoomba Region**
- **Persistent calls for action – driven in a climate of high demand and constrained supply**
- **Why is land supply important and what are the key factors influencing land supply**
- **Episode 1: The Verdict - Key findings of independent review into available land supply.**
- **Episode 2: The Blueprint – coming in 2022**

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Why is Residential Land Supply Important?

A sufficient supply of residential land is essential to:

1. Underpin Economic Growth, Business Attraction and Employment
2. Ensure Housing Affordability (Toowoomba's comparative advantage…for now)
3. Provide Choice & Competition (housing type, location)
4. Maintain a stable rental sector

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Background

- Precinct Urban Planning undertook a study in 2017 highlighting the limited capacity of zoned areas and rapidly eroding supply of available land.

- Since then a multitude of assessments have been undertaken by technical experts in the field and nationally recognised property experts including:

    - Michael Matusik (Matusik Property Insights)
    - Tim Lawless (Core Logic)
    - Terry Ryder (Hotspotting -The Australian)

  Who have all concluded Toowoomba has a significant land supply problem

- The alternate position that we have a plentiful supply of unconstrained residential land is not supported by available evidence.

Background

- Two studies undertaken by Council

    - PSA Consulting – Residential Land Supply Short Term Snapshot;
    - National Property Research Co. – Housing Needs Analysis

    which where properly interpreted confirm rather than refute the existence of a significant short term land supply problem

- Inexplicably the report put before Council painted a very different picture:

    - 27 years supply of residential land;

    - 4300 approved residential allotments

Note

- At an average allotment consumption – 800 lots/annum.
- 27 Years supply = 21,600 lots

Determinants of land supply

Zoning key to more affordable housing: RBA

ADAM CREIGHTON
ECONOMICS CORRESPONDENT

HOW AVERAGE HOUSE PRICES BREAK DOWN

REGULATORY

1. SEQ Regional Plan Designation (Urban Footprint)
2. Zoning
3. Priority Infrastructure Area (PIA)

PHYSICAL

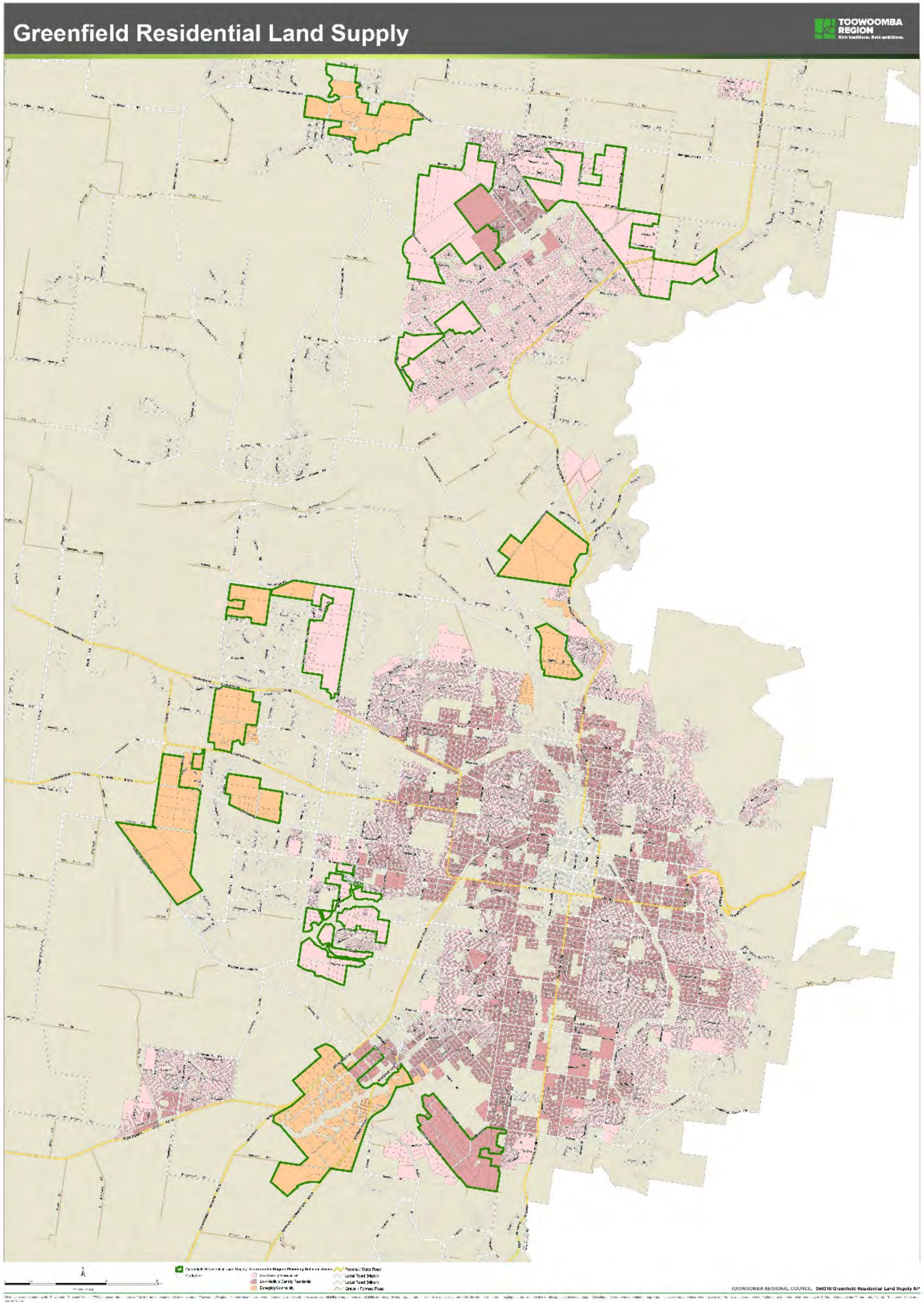
1. Availability of physically unconstrained land
2. Infrastructure Availability

MARKET

1. Economic/Market Considerations

COUNCIL IDENTIFIED GREENFIELD RESIDENTIAL LAND SUPPLY AREAS

- Council have mapped the land they claim is **"available" greenfield residential land (27 years supply)**
- Important to take a **fine grain review** of land availability and factor in the physical, regulatory and environmental constraints.



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Land Availability Constraints

- **Constraints can be Hard or Soft**
  - **Hard Constraints preclude development**
  - **Soft Constraints simply make land more difficult to develop**

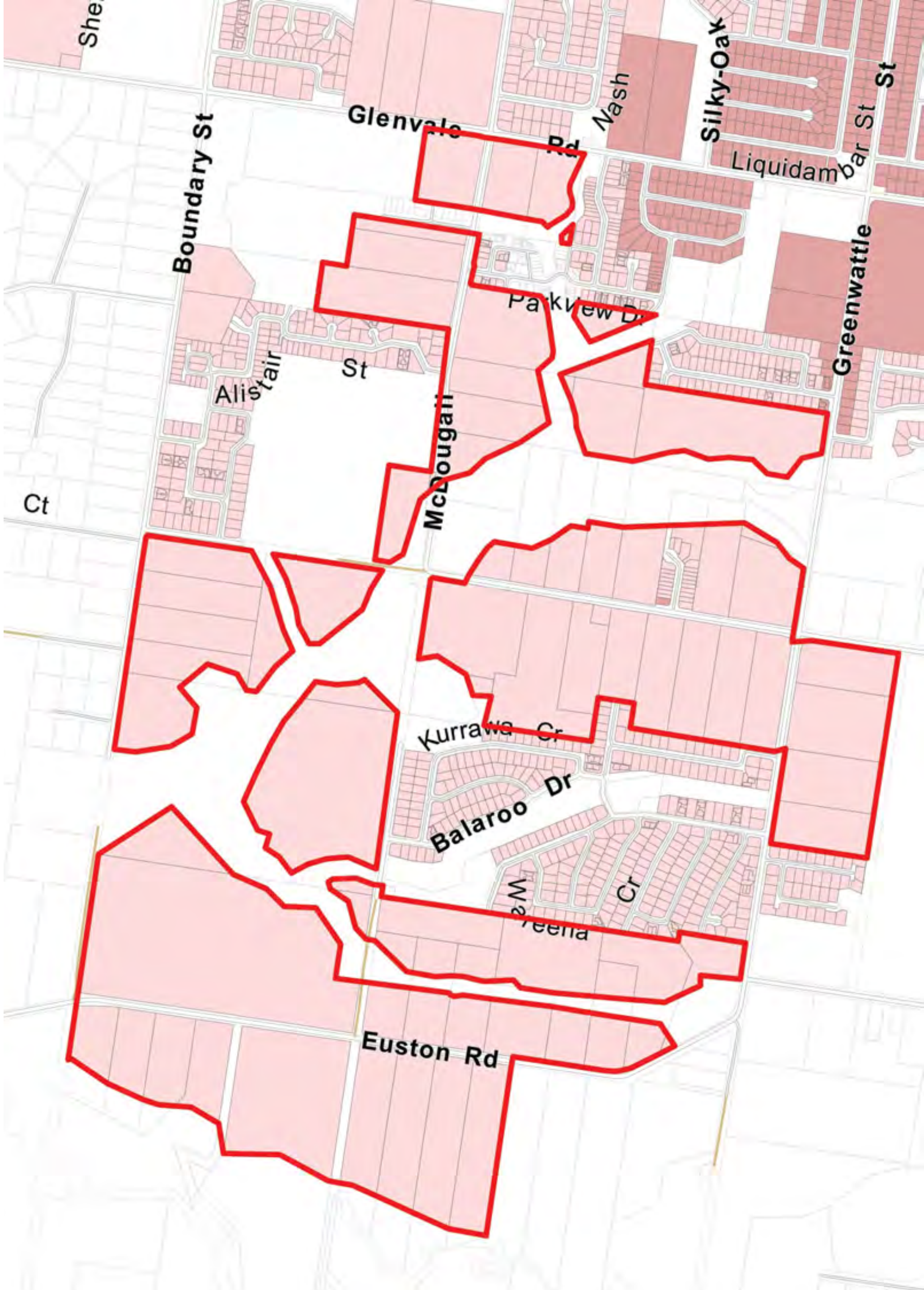
Our Focus - Key Hard Constraints

- Land already developed or allocated to a non-urban use
- Quarry Separation and Haulage Route Buffers
- Flood Liable Areas
- Areas of excessive slope (>15%)
- Core Koala Habitat

Glenvale

“Available” Greenfield Residential

Areas identified by Council



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Glenvale

Aerial Photography

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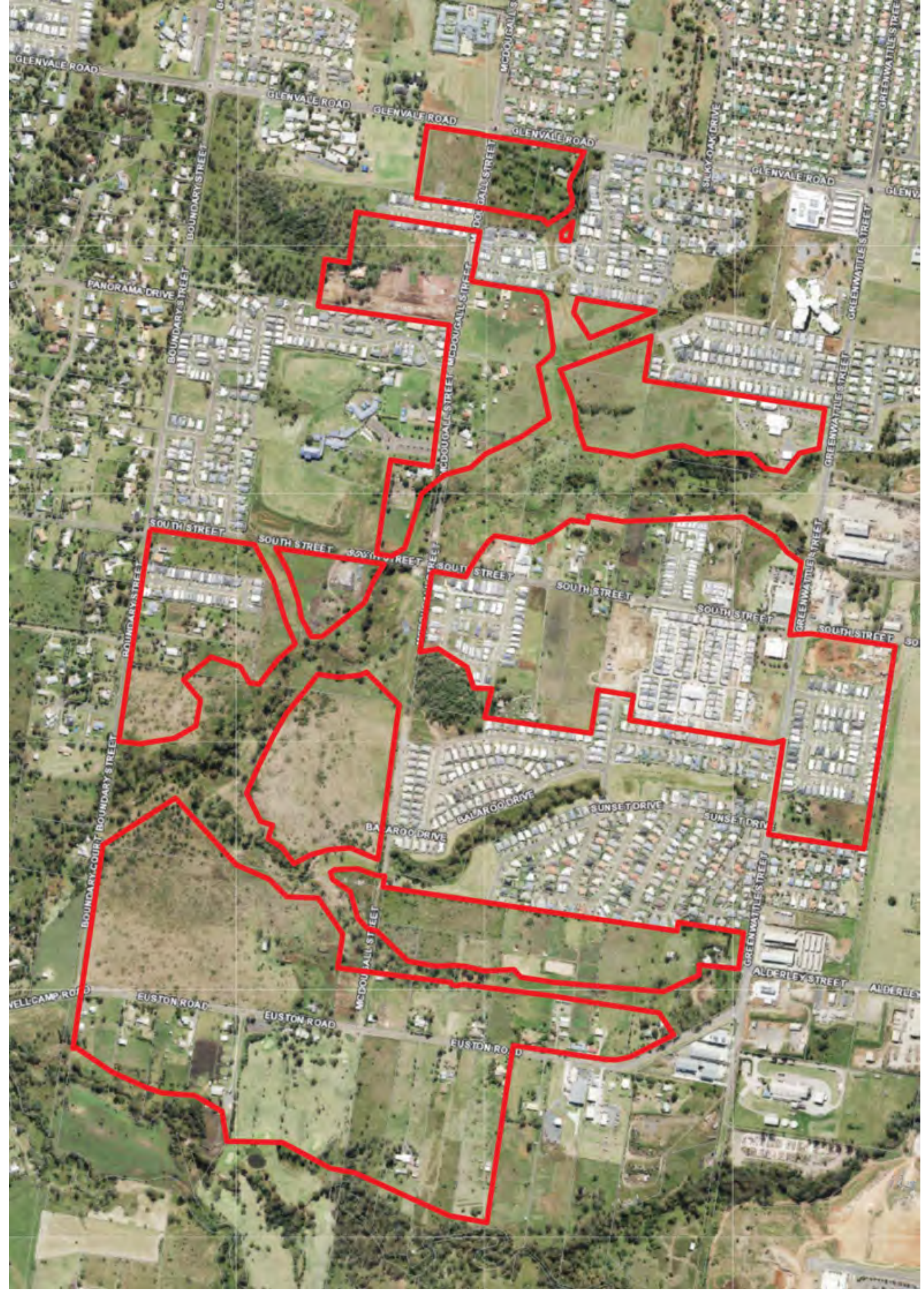

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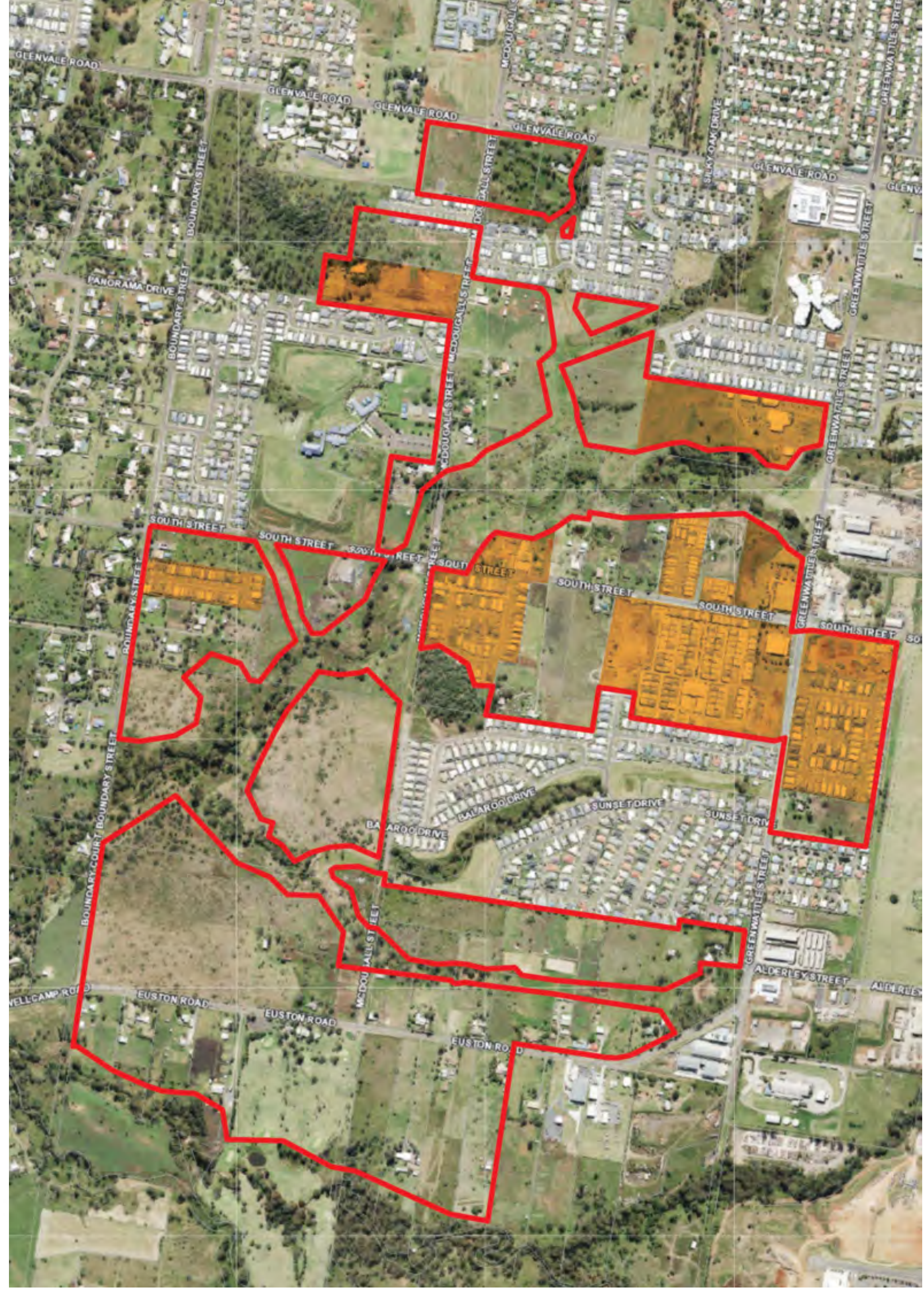
Glenvale

Developed Land & Land used for a non-residential purpose



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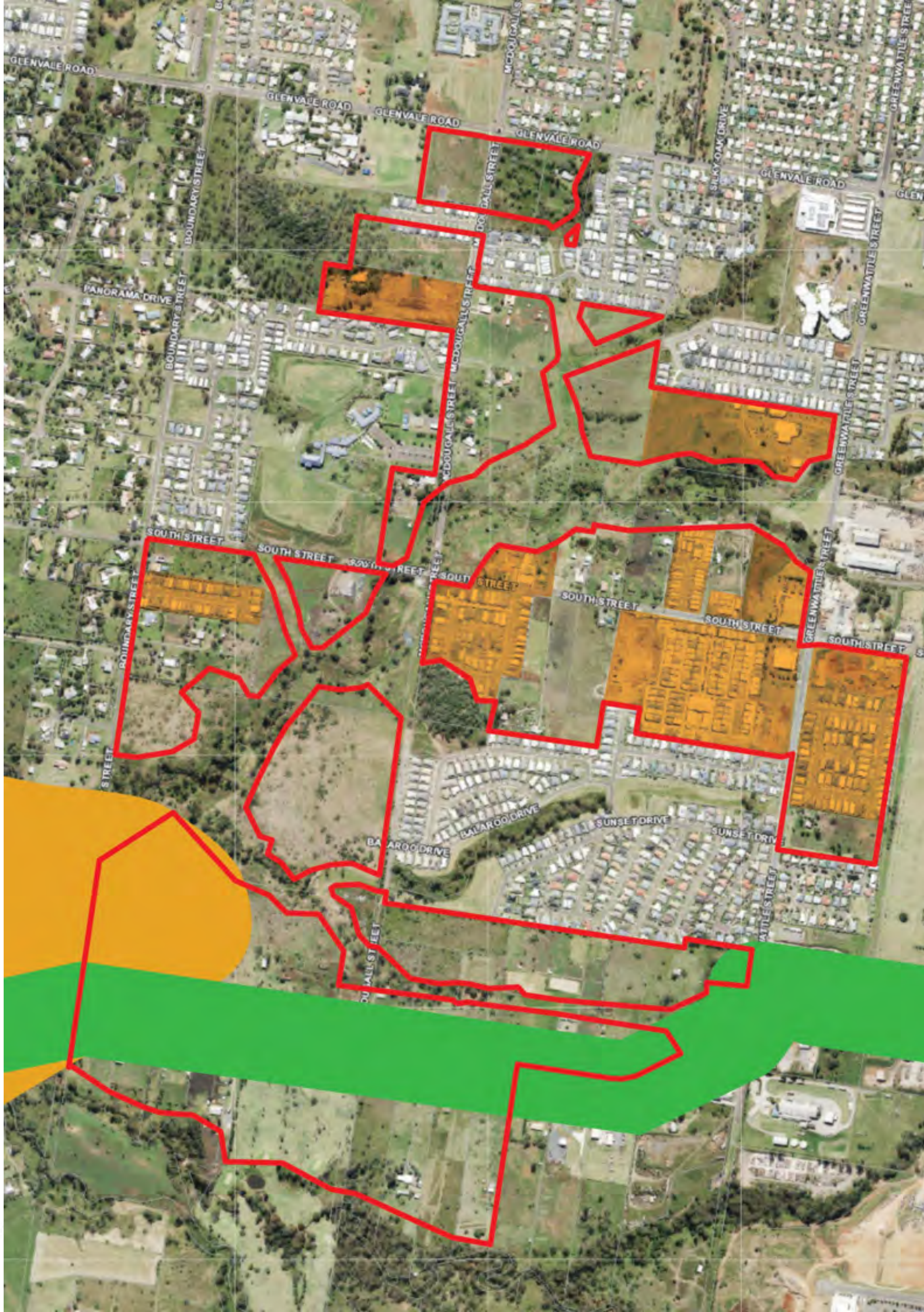
Key Resource Area Separation

and Haulage Route Buffer



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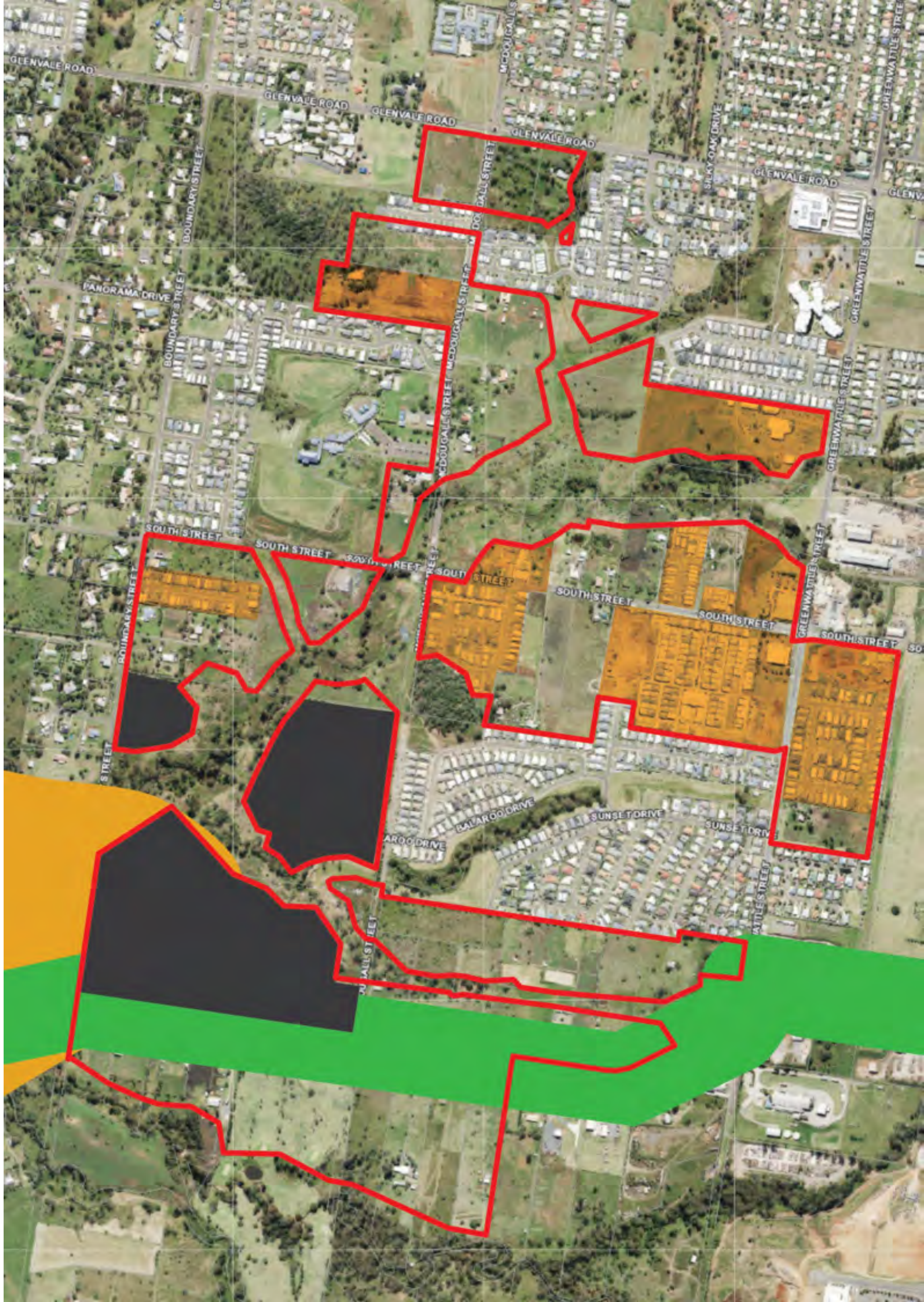
Residential Development

subject to Appeal



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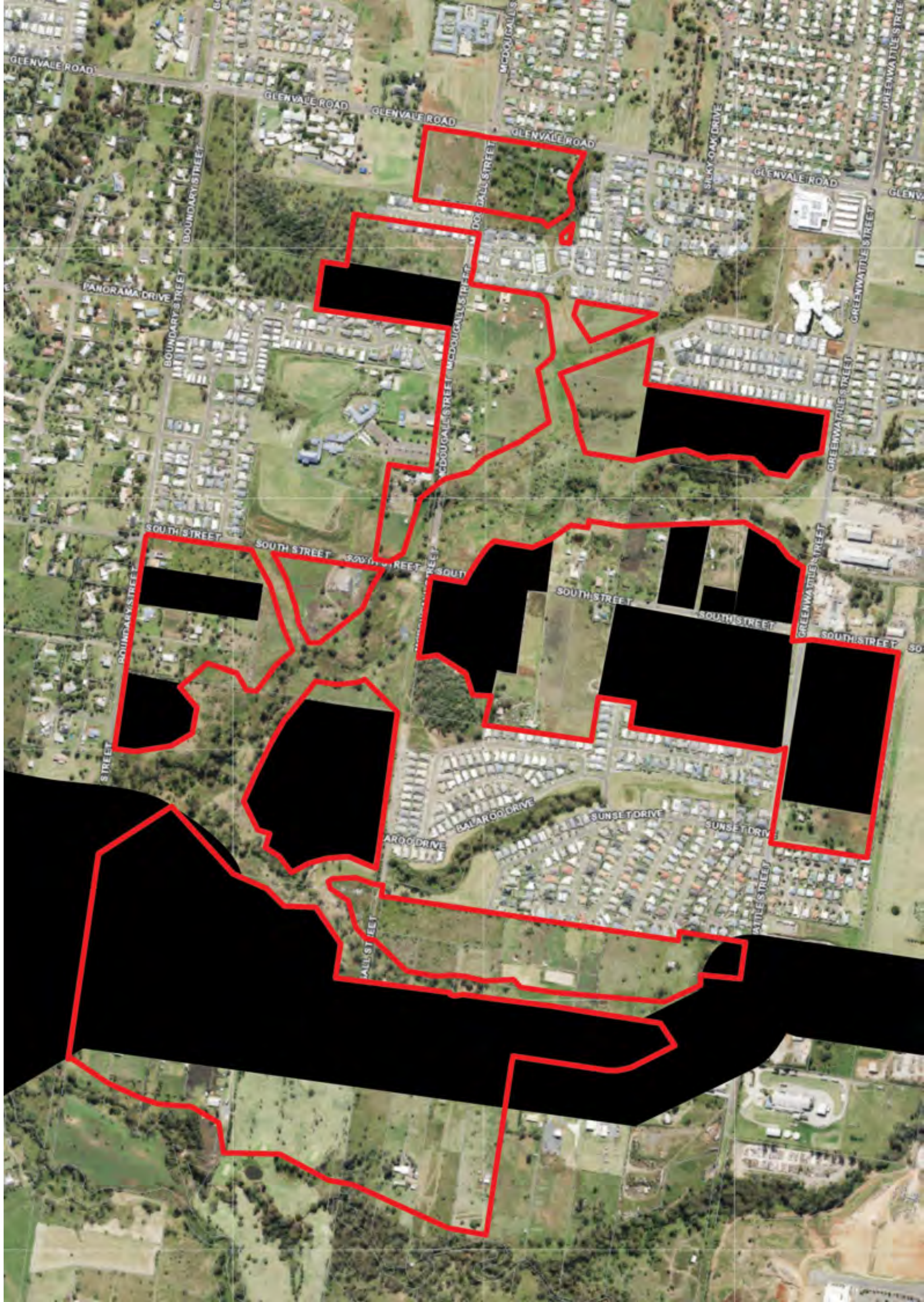
Unavailable "Available" Areas



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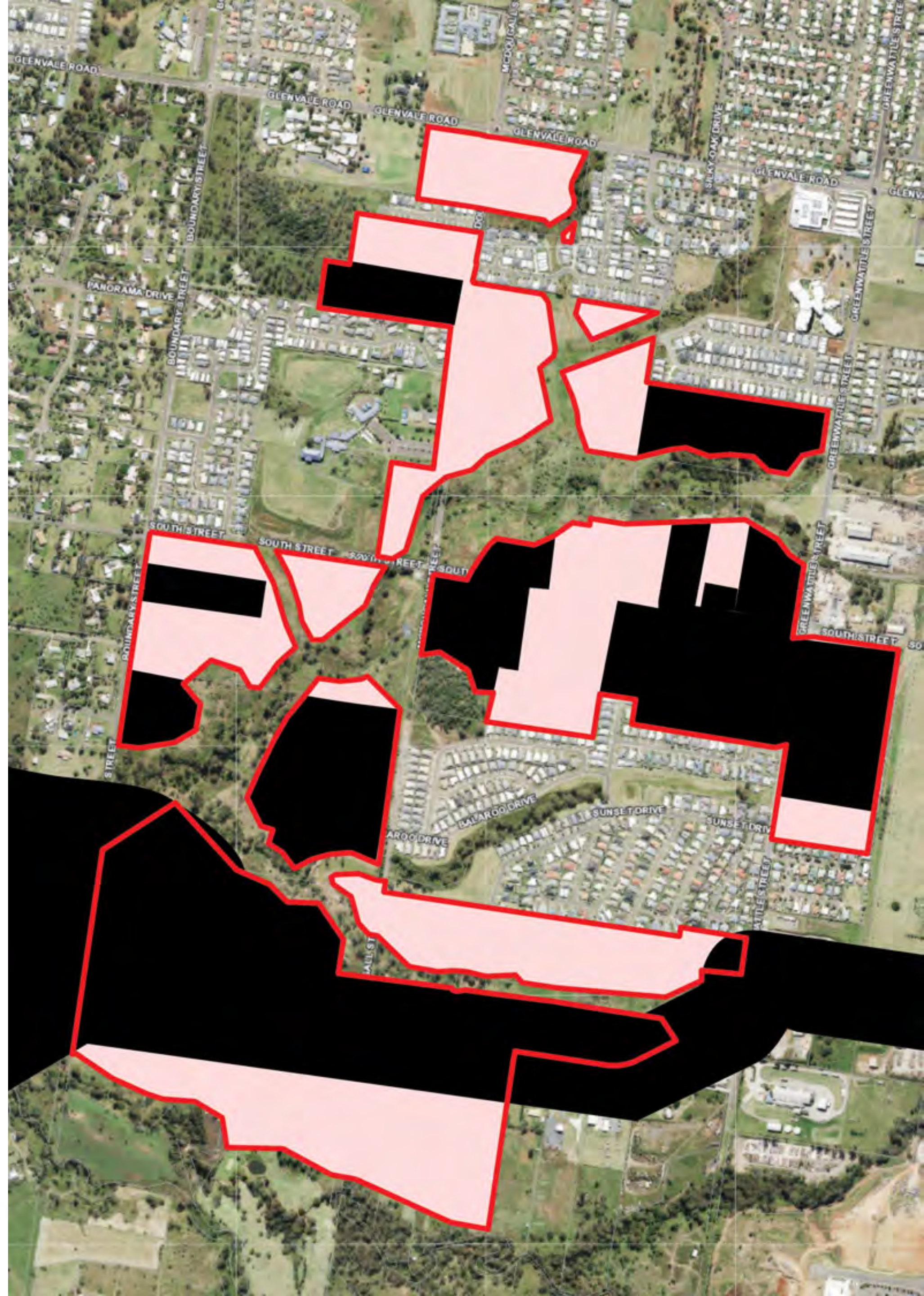
Residual “Available” Areas



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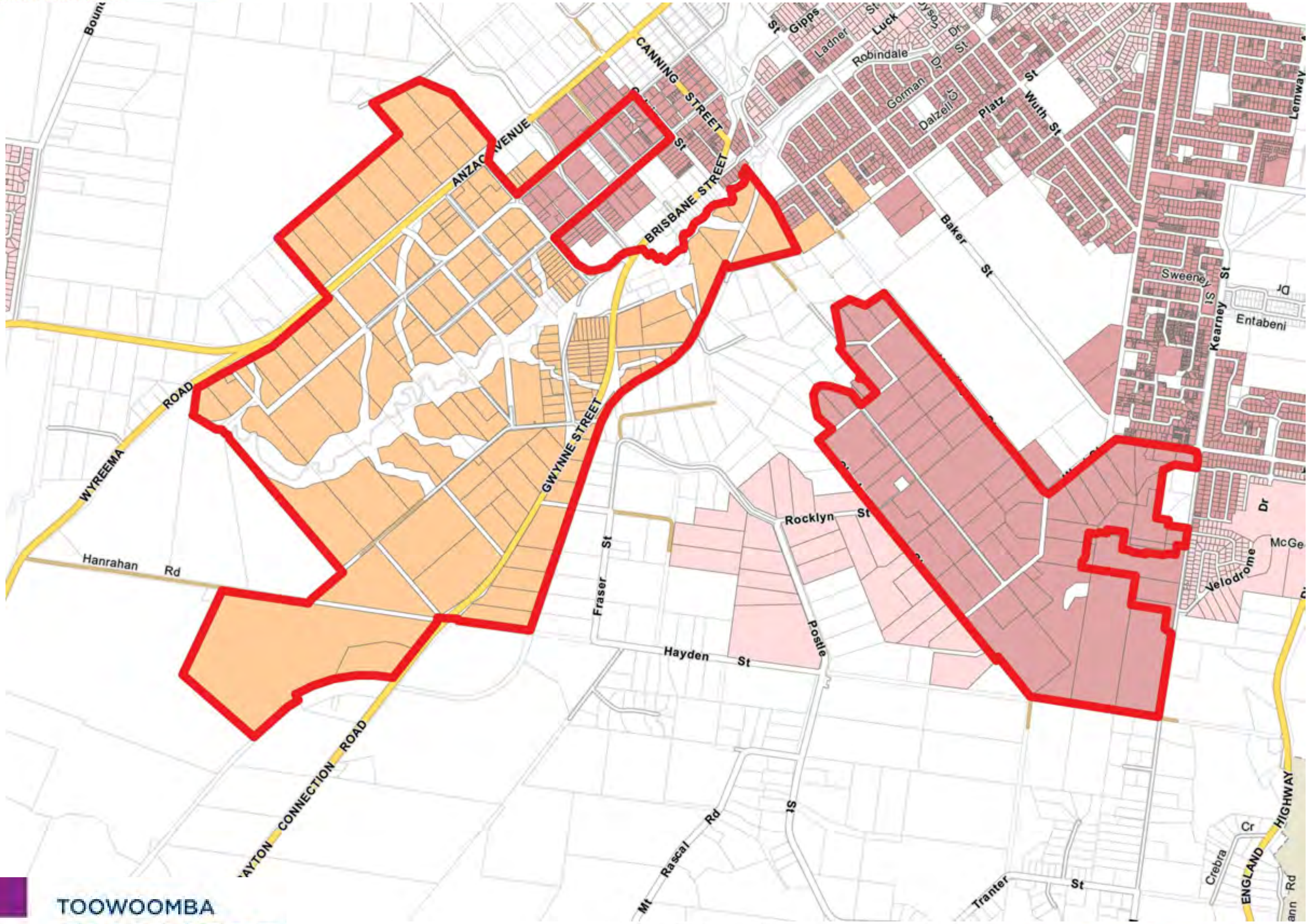
Drayton – "Available" Greenfield Residential Areas identified by Council



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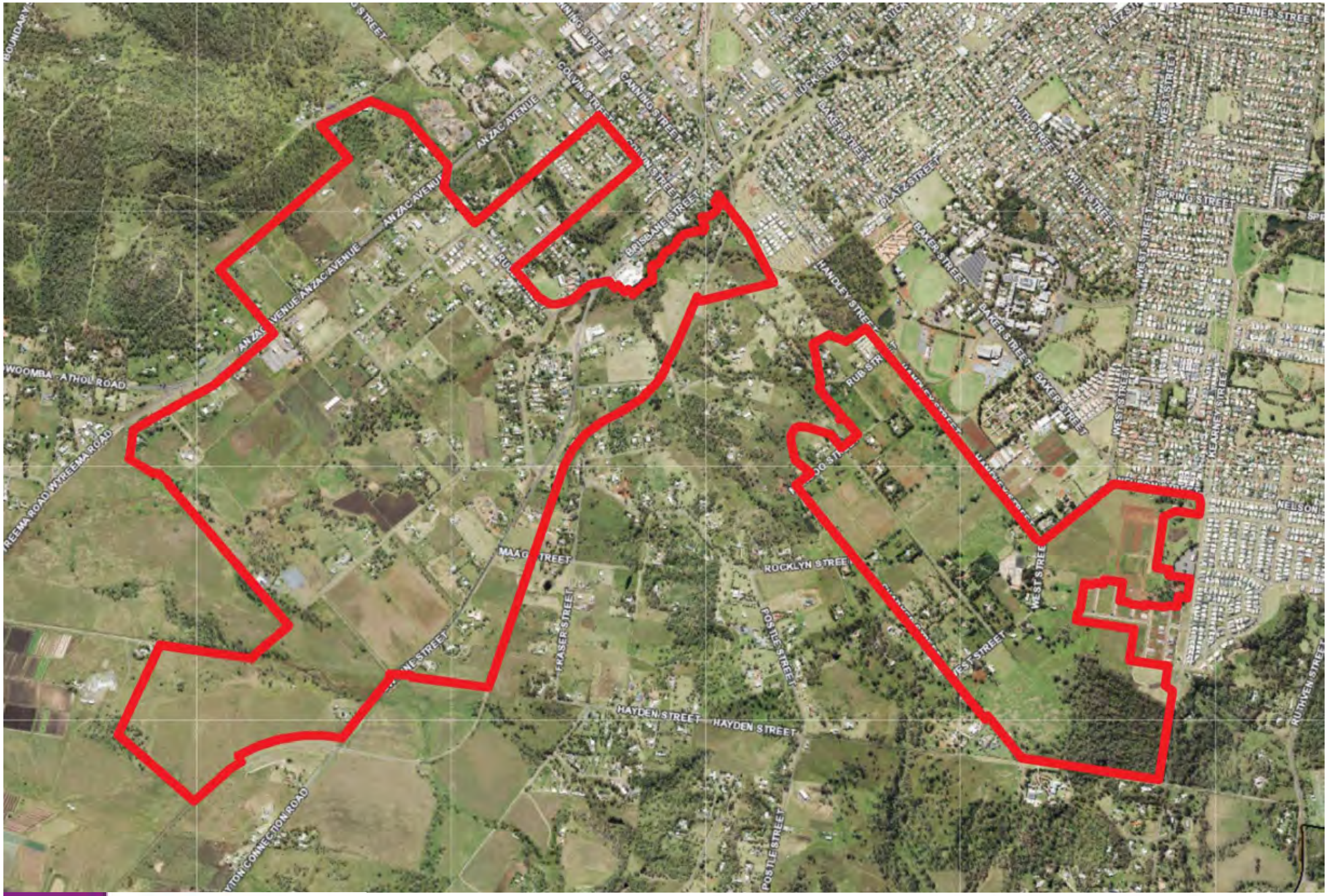
Drayton – Aerial Photography



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Drayton – Developed Land & Land used for a Non-residential Purpose

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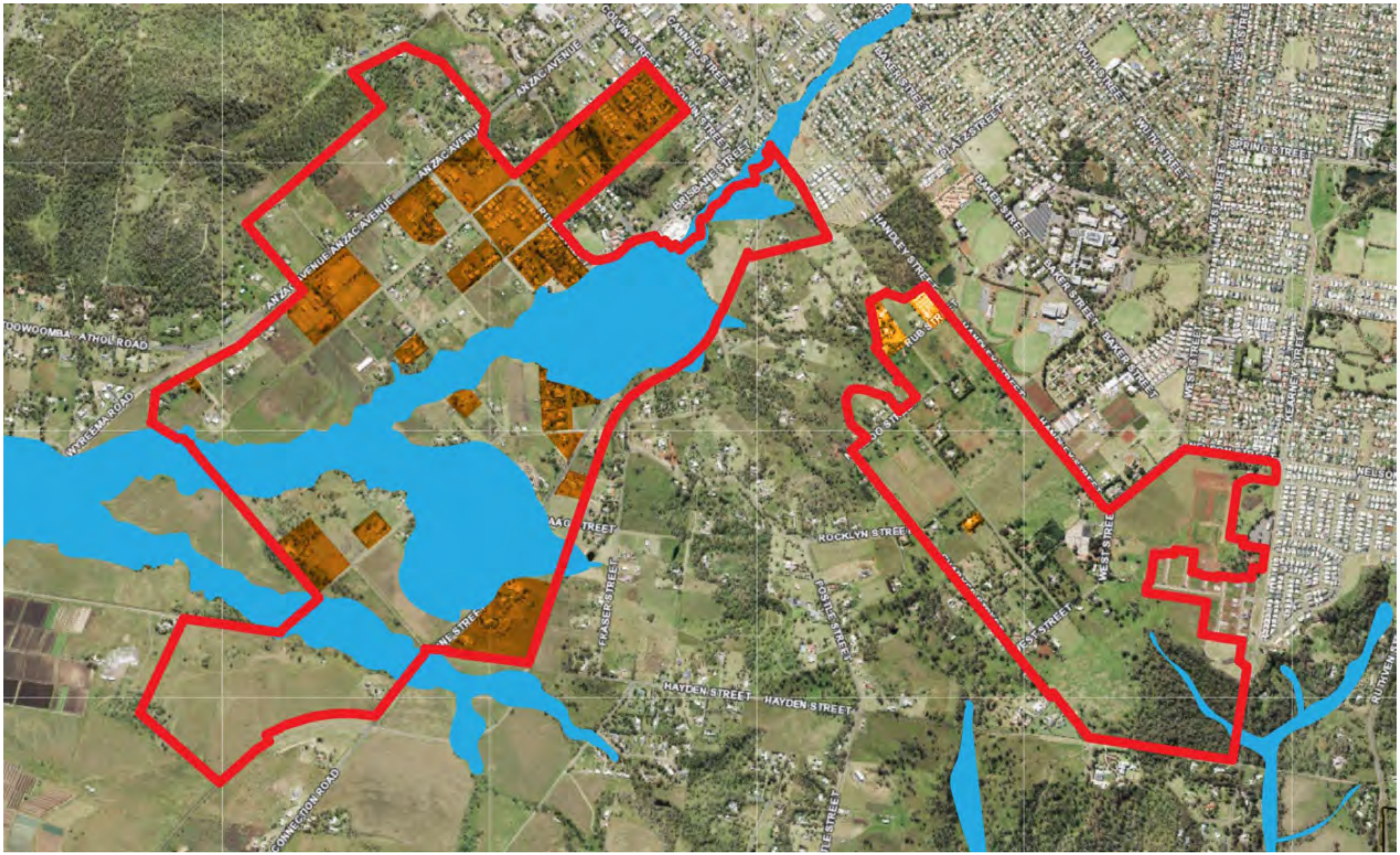
Drayton – Flood Affected Land



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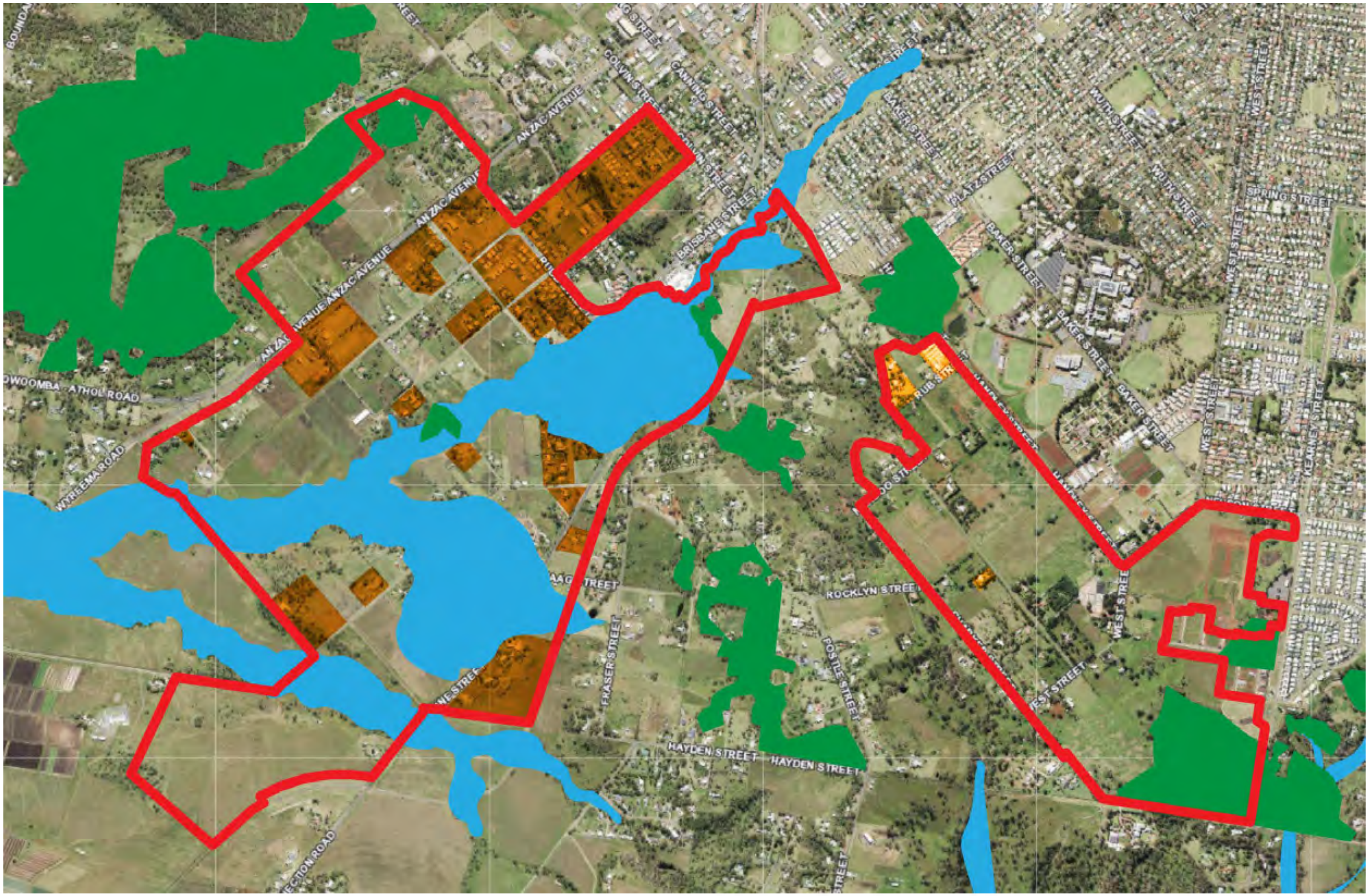
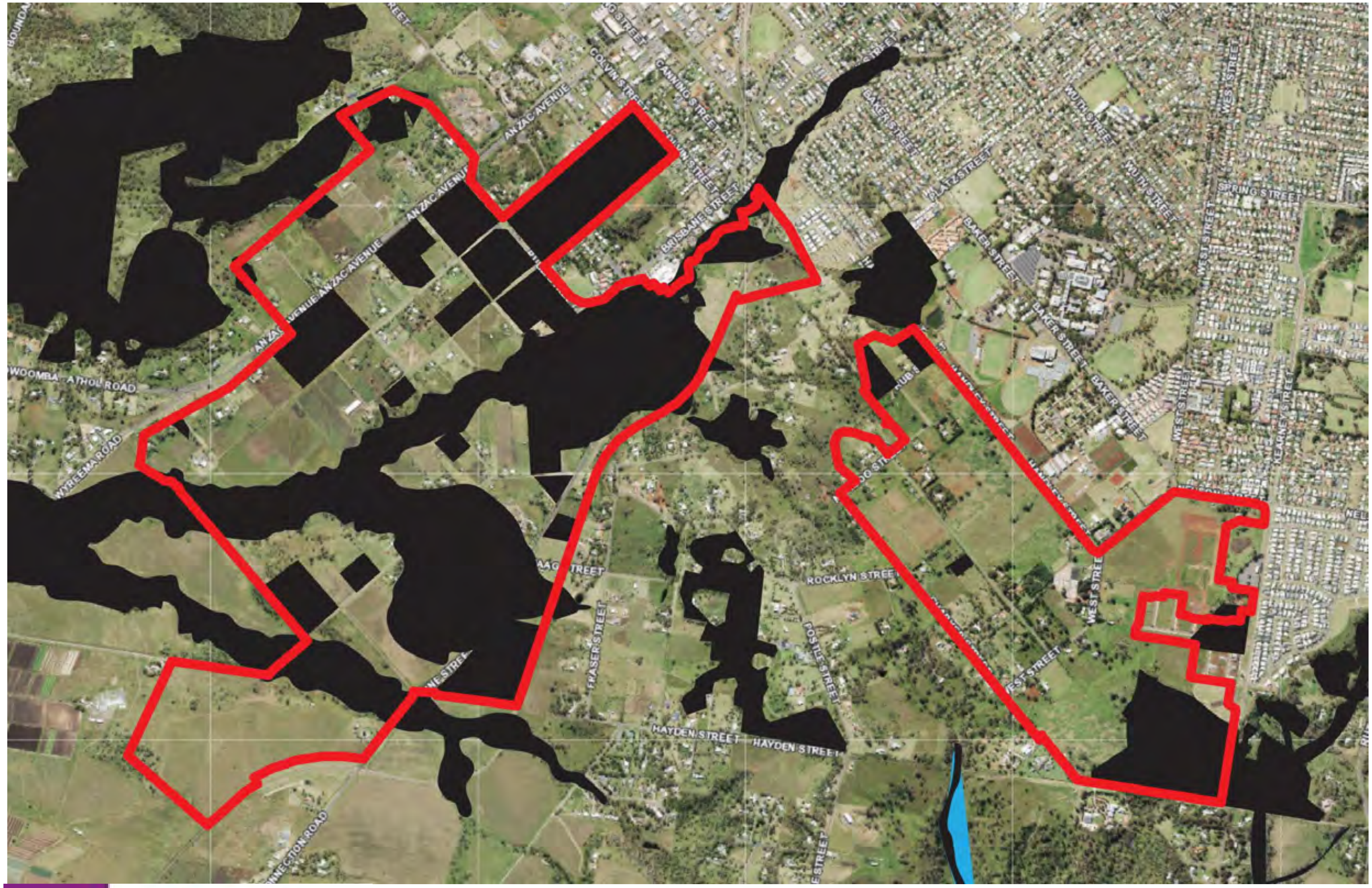
Drayton – Koala Habitat



Drayton – Unavailable "Available" Areas



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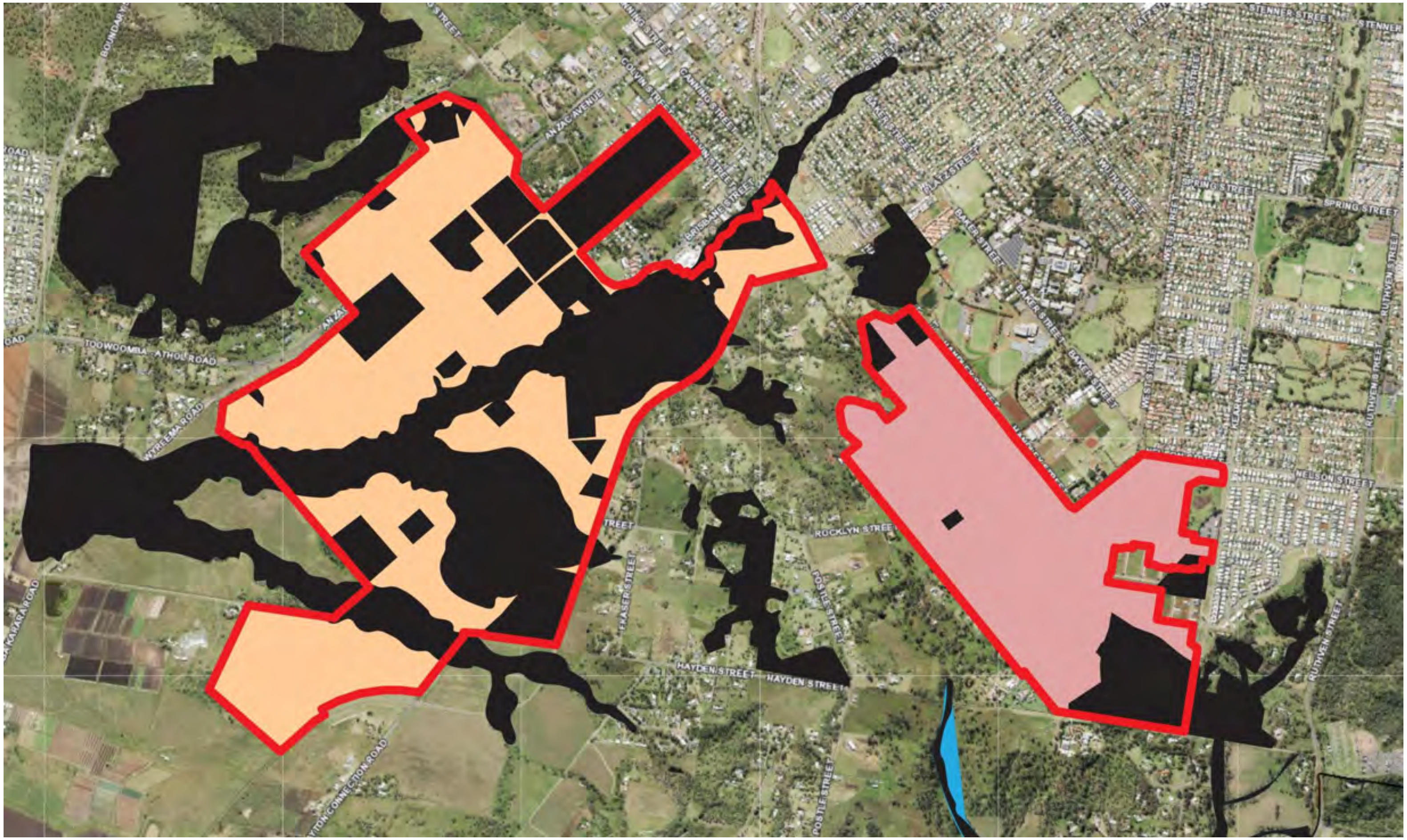
Drayton – Residual "Available" Areas



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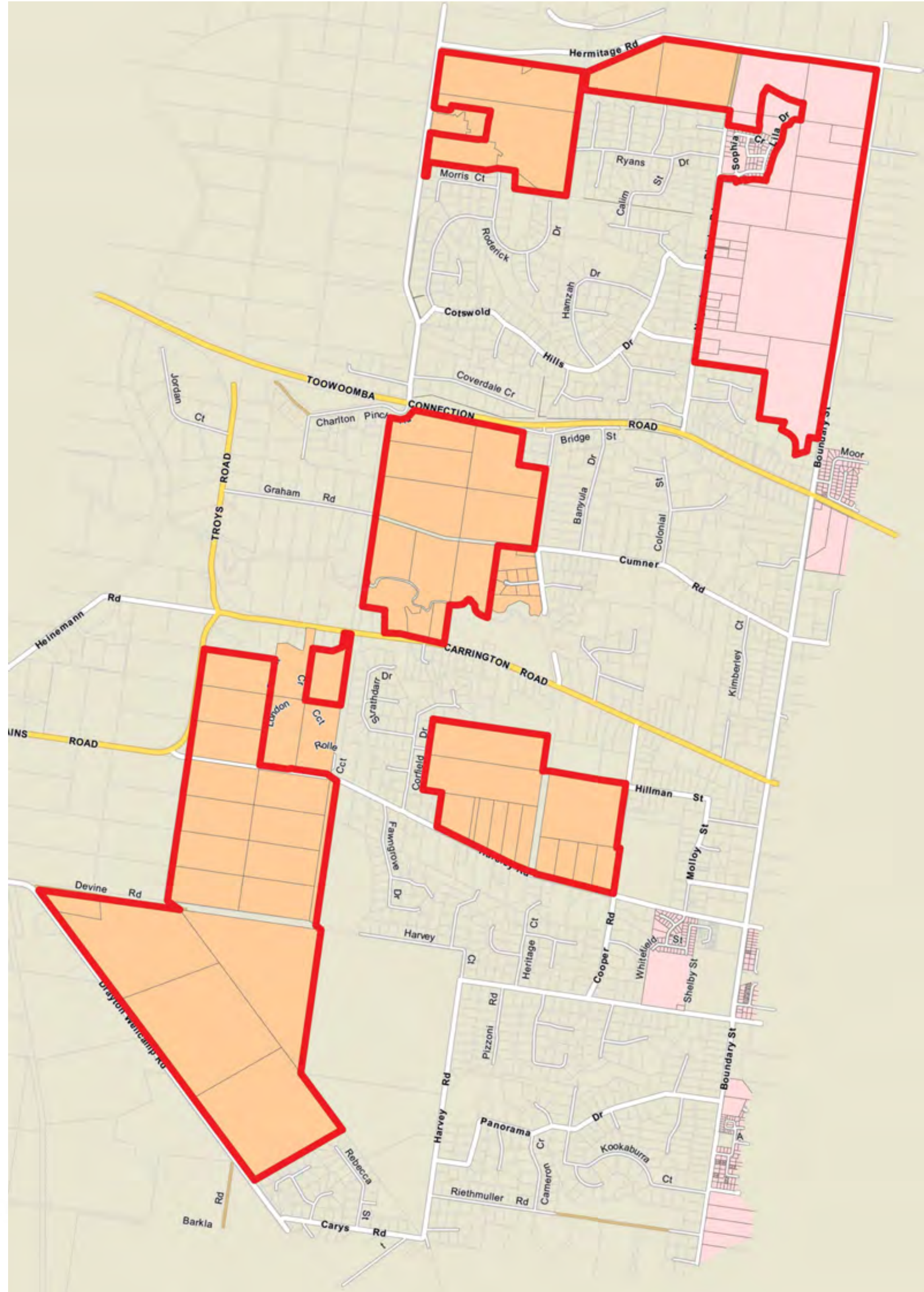
Glenvale West, Cotswold & Torrington

“Available” Greenfield Residential

Areas identified by Council



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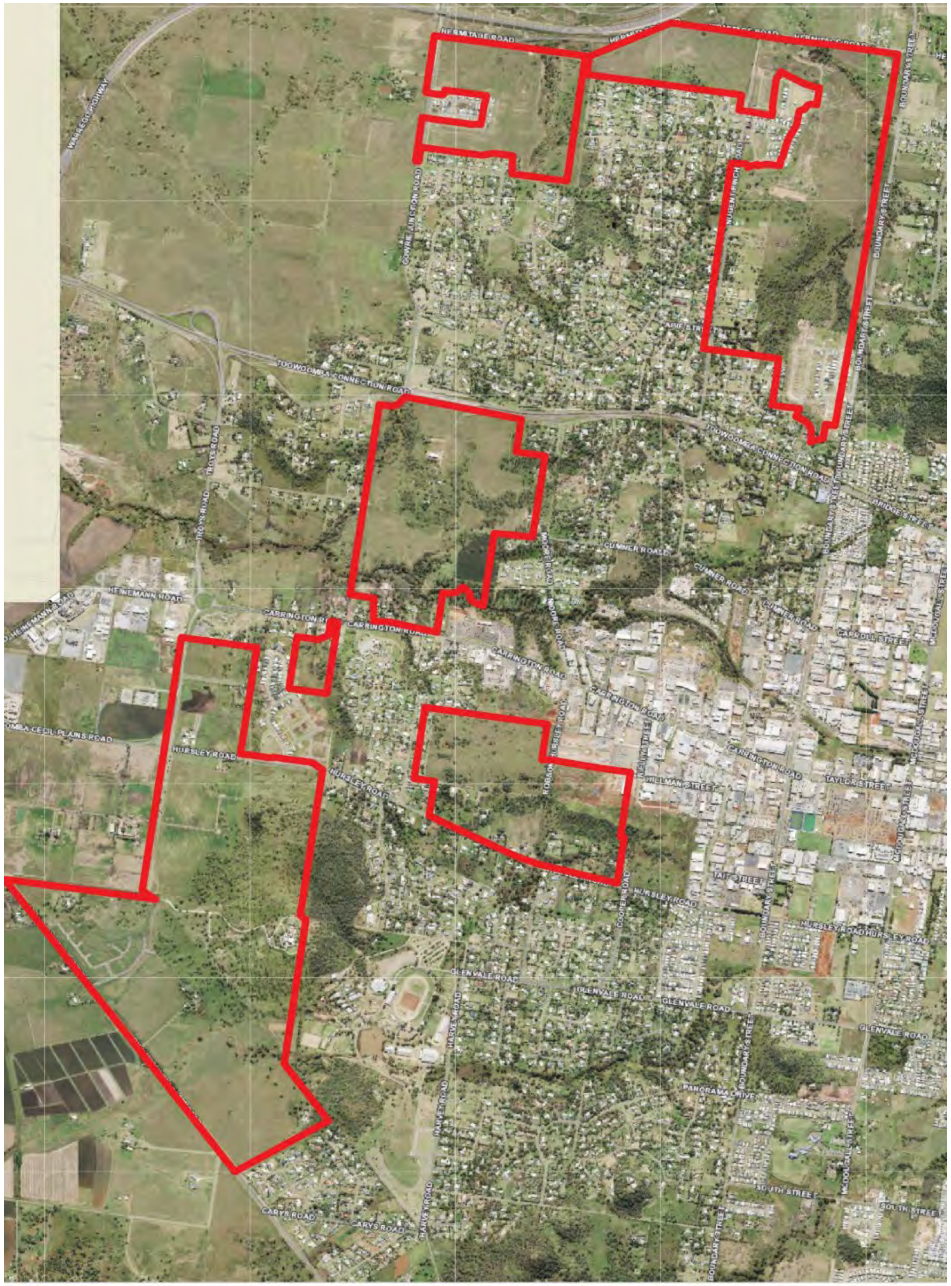
Glenvale West, Cotswold & Torrington

Aerial Photography



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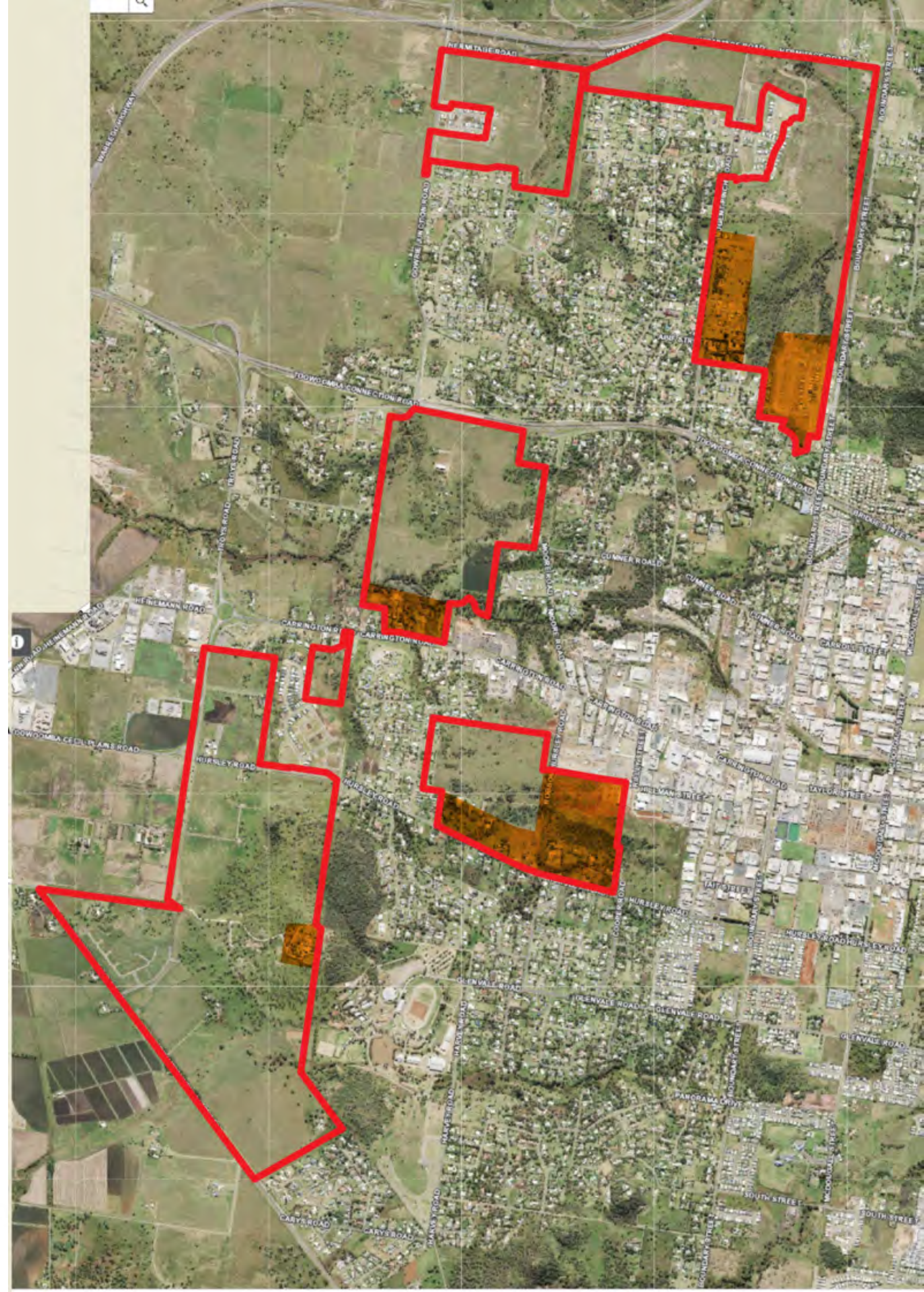
Glenvale West, Cotswold & Torrington

Developed Land & Land Used

for a Non-residential Purpose



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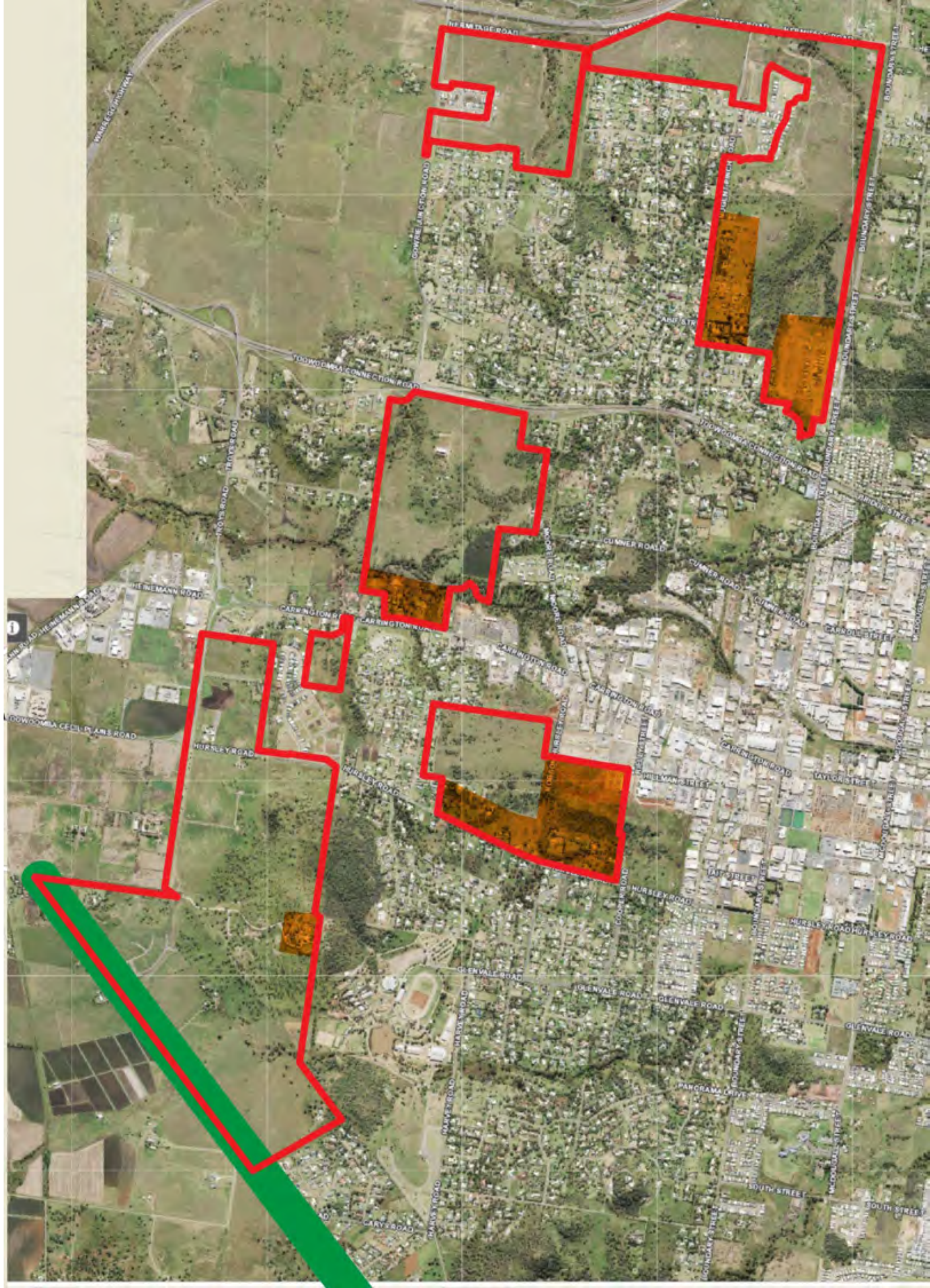
Glenvale West, Cotswold & Torrington

Key Resource Area Haulage

Route Buffer



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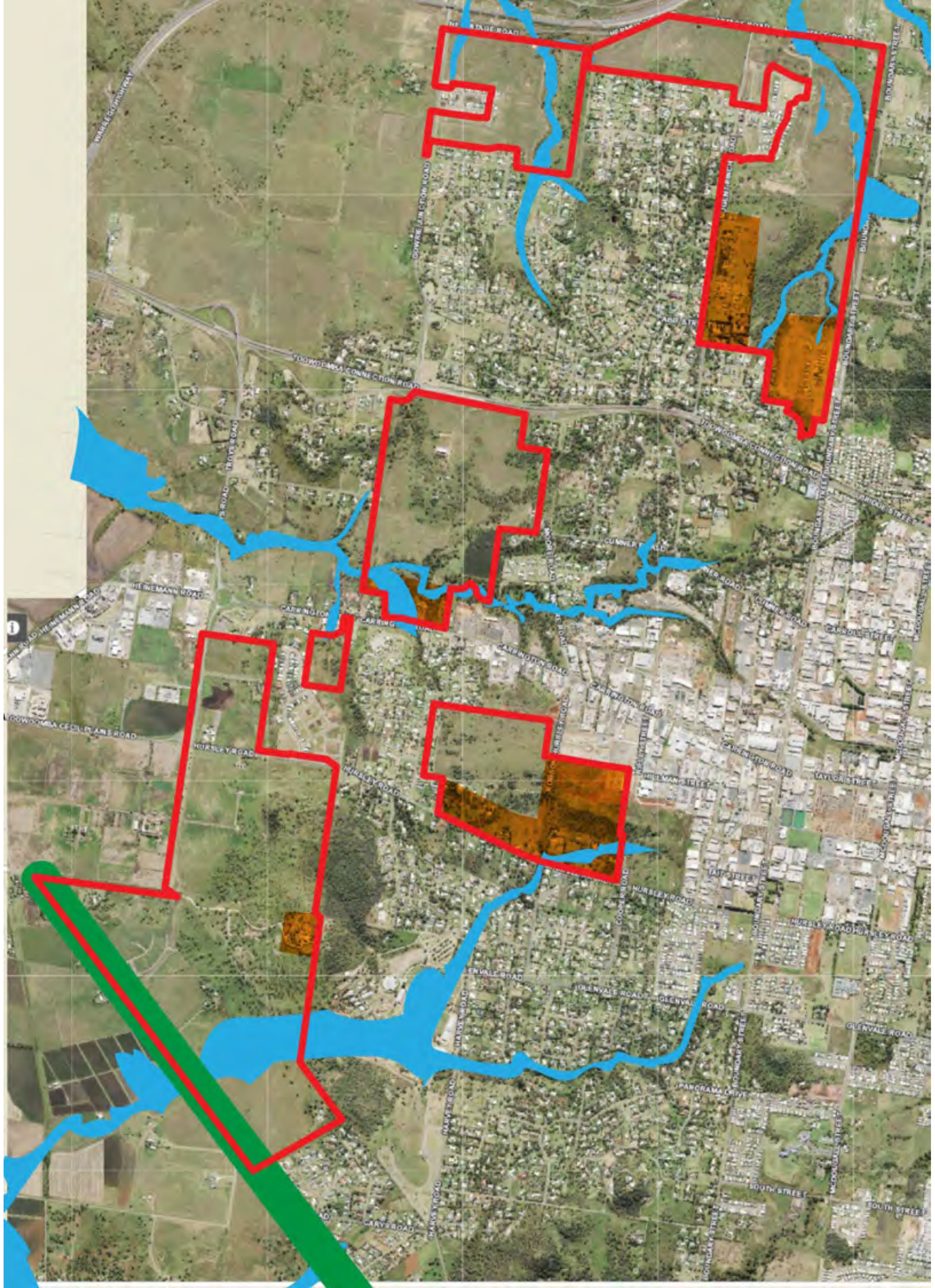
Glenvale West, Cotswold & Torrington

Flood Affected Land



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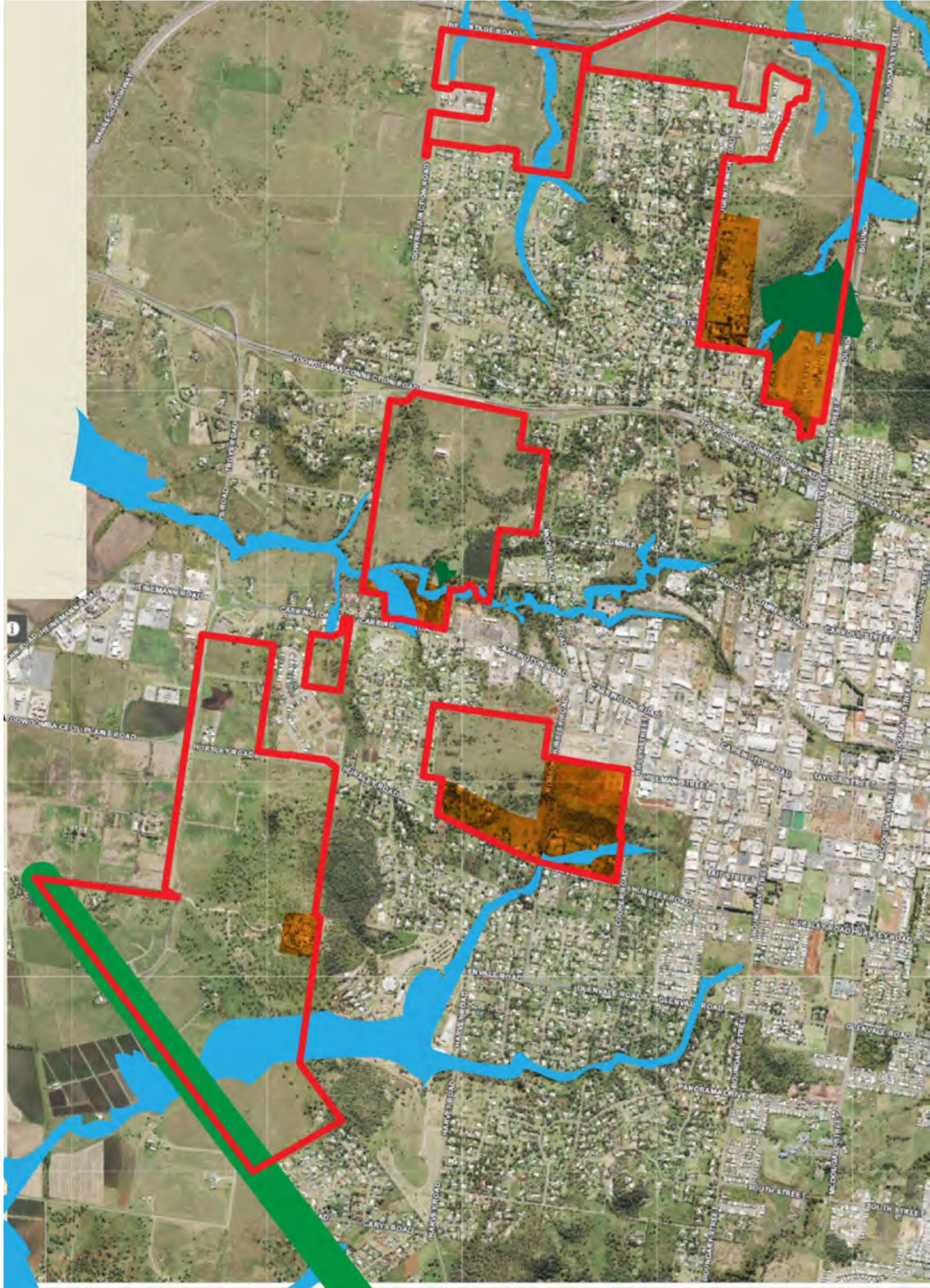
Glenvale West, Cotswold & Torrington

Koala Habitat



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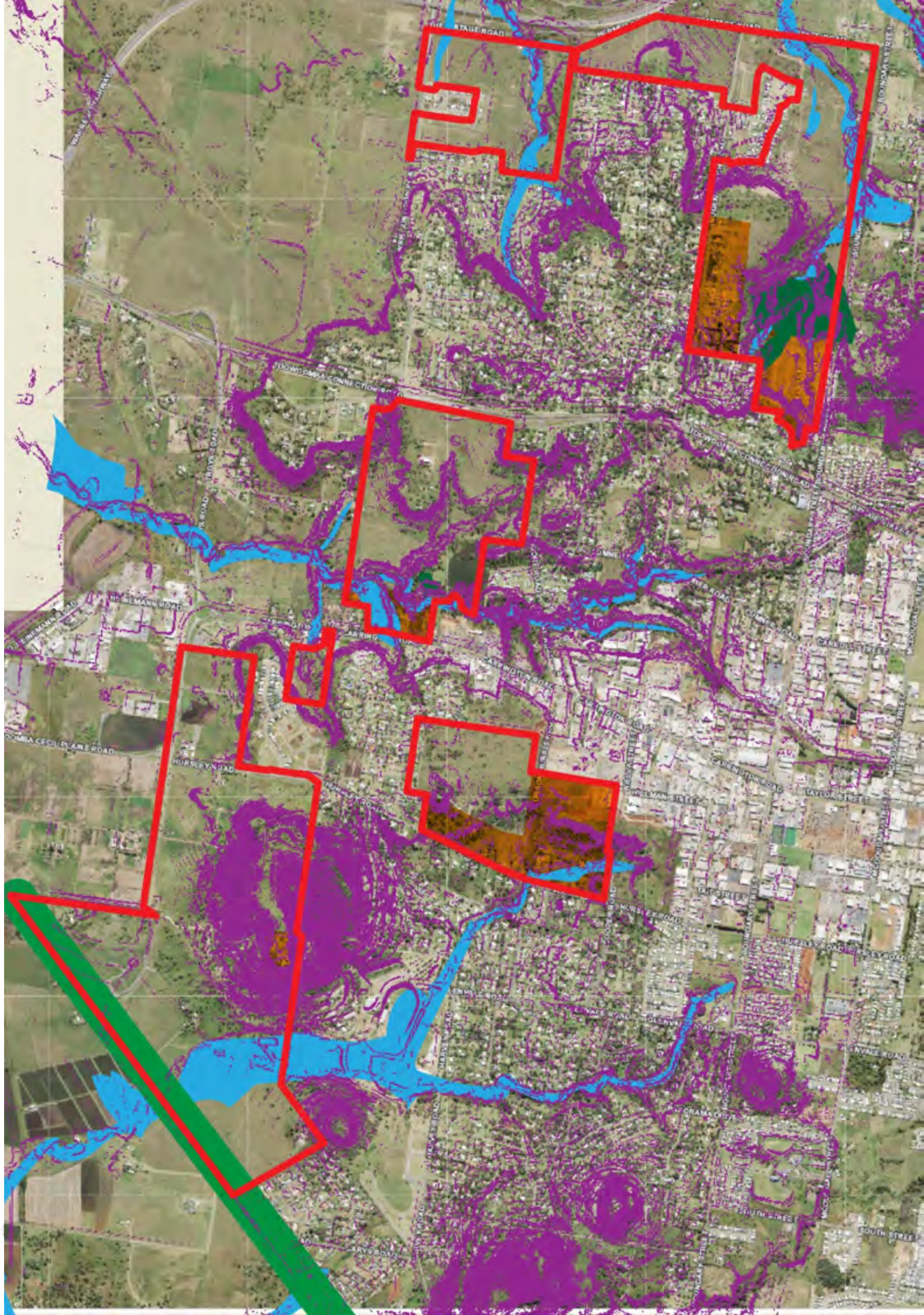
Glenvale West, Cotswold & Torrington

Slope > 15%



Glenvale West, Cotswold & Torrington

Unavailable "Available" Areas

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Glenvale West, Cotswold & Torrington

Residual “Available” Areas

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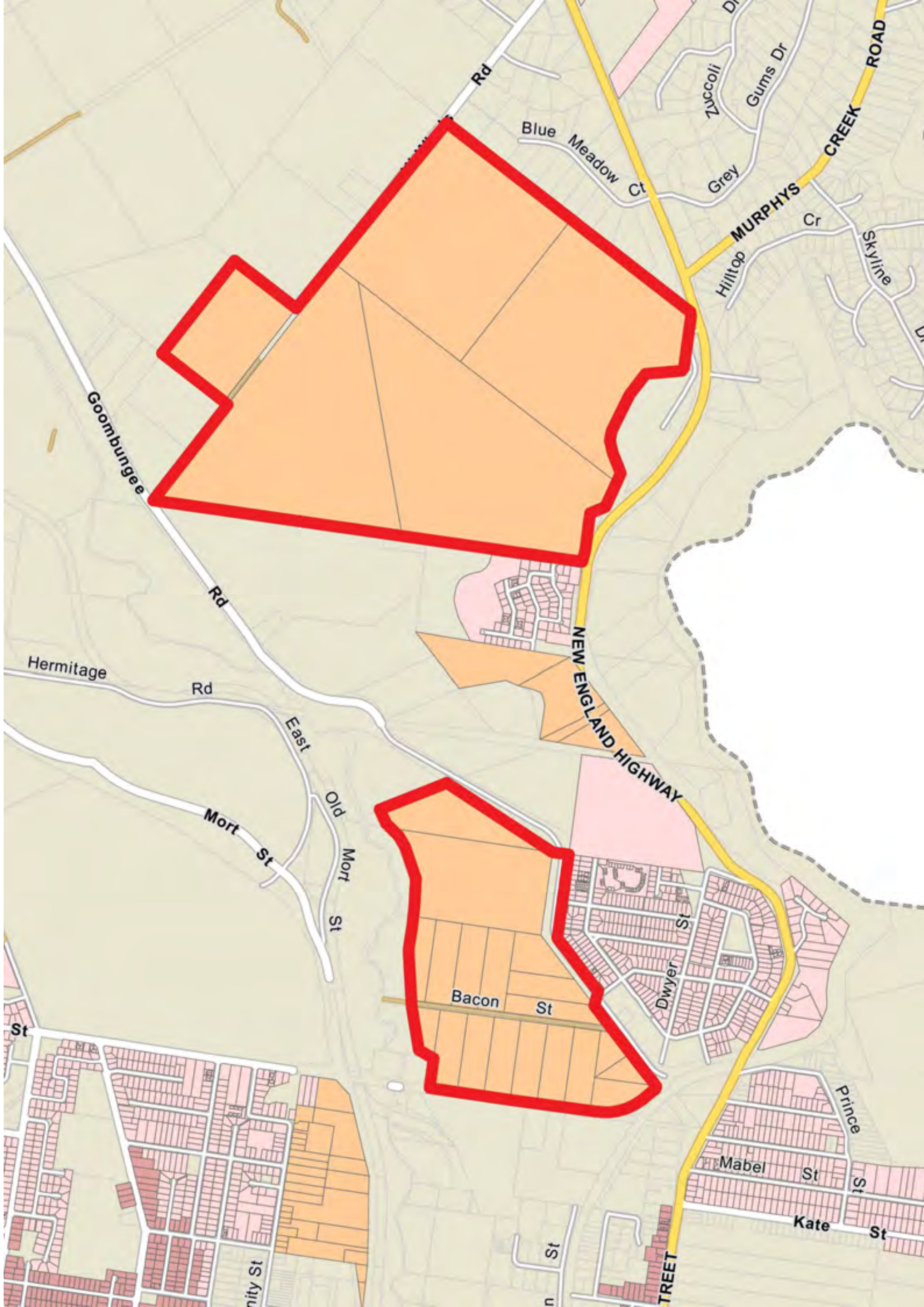
Mt Kynoch

"Available" Greenfield Residential

Areas identified by Council



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Mt Kynoch

Aerial Photography

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Mt Kynoch

Developed Land & Land Used

for a Non-Residential Purpose

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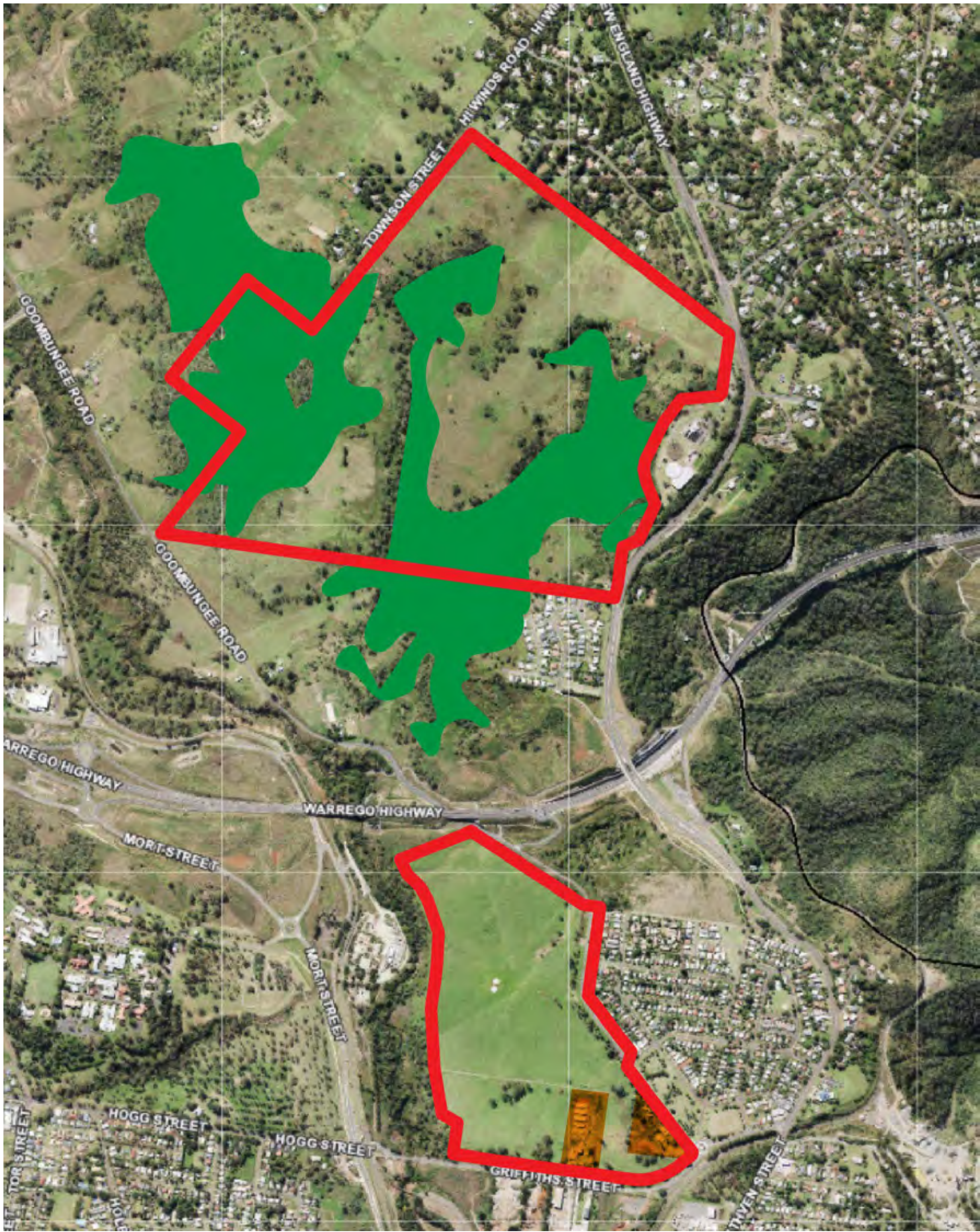
Mt Kynoch

Koala Habitat



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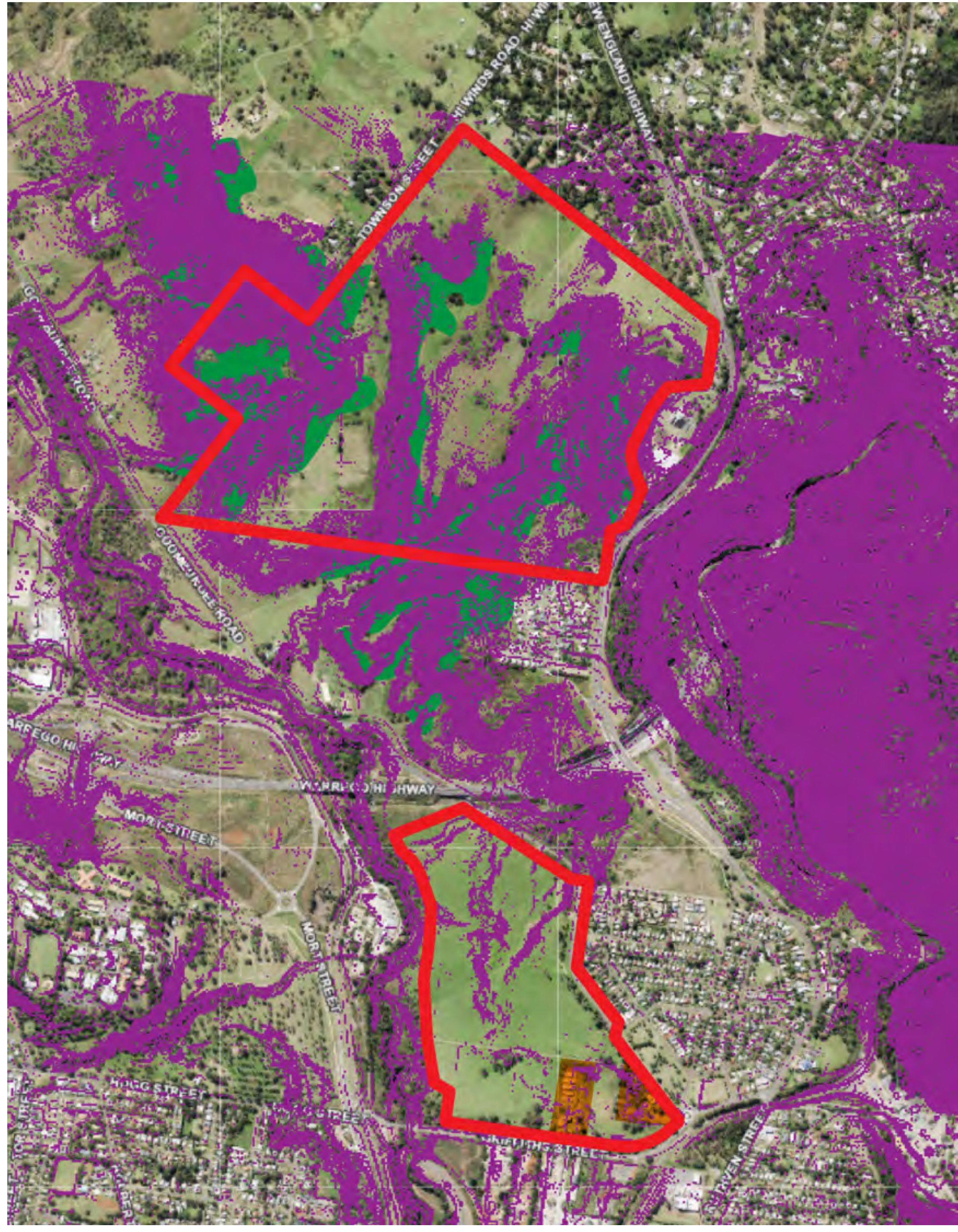
Mt Kynoch

Slope > 15%



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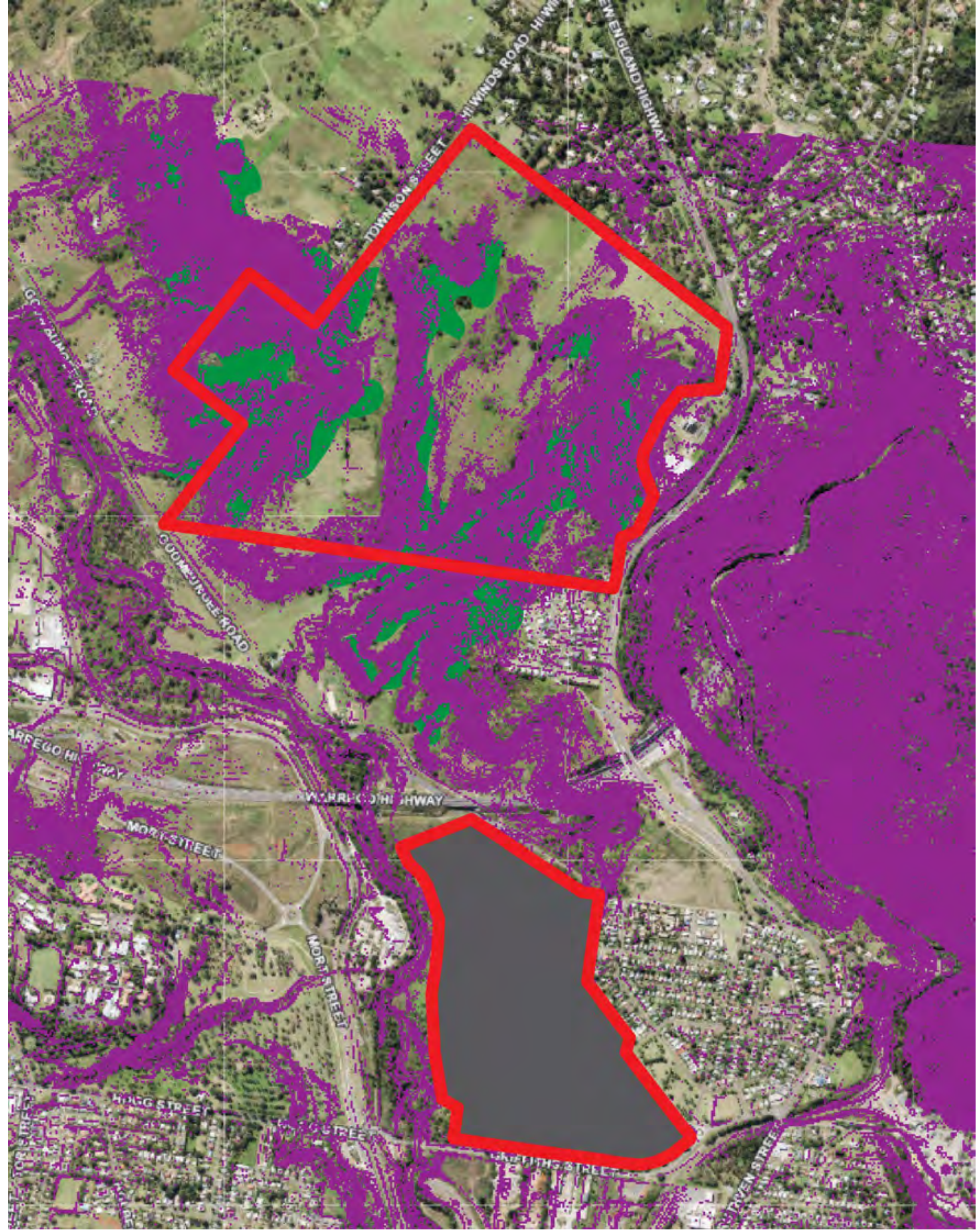
Mt Kynoch

Residential Development

subject to Appeal



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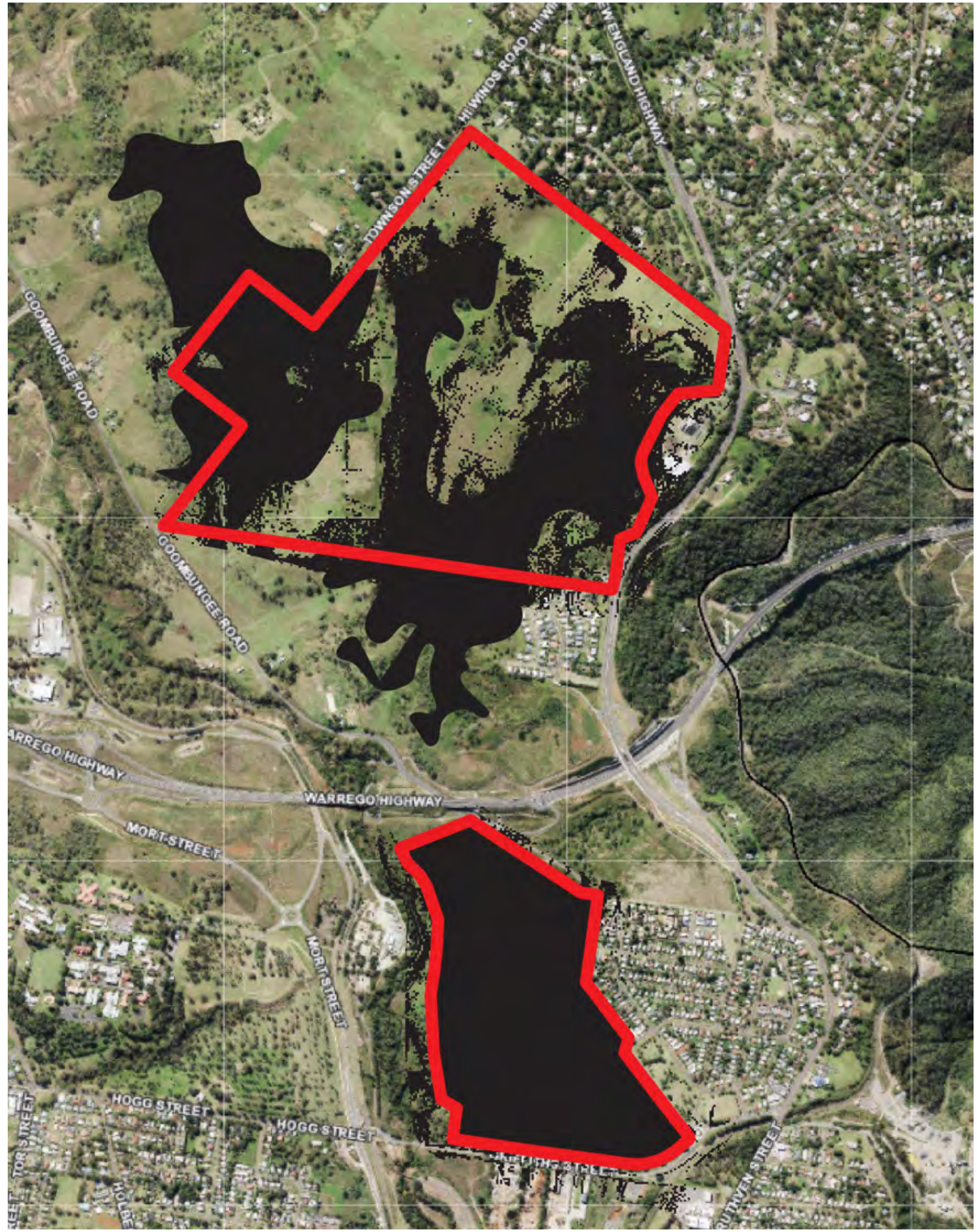
Mt Kynoch

Unavailable "Available" Areas



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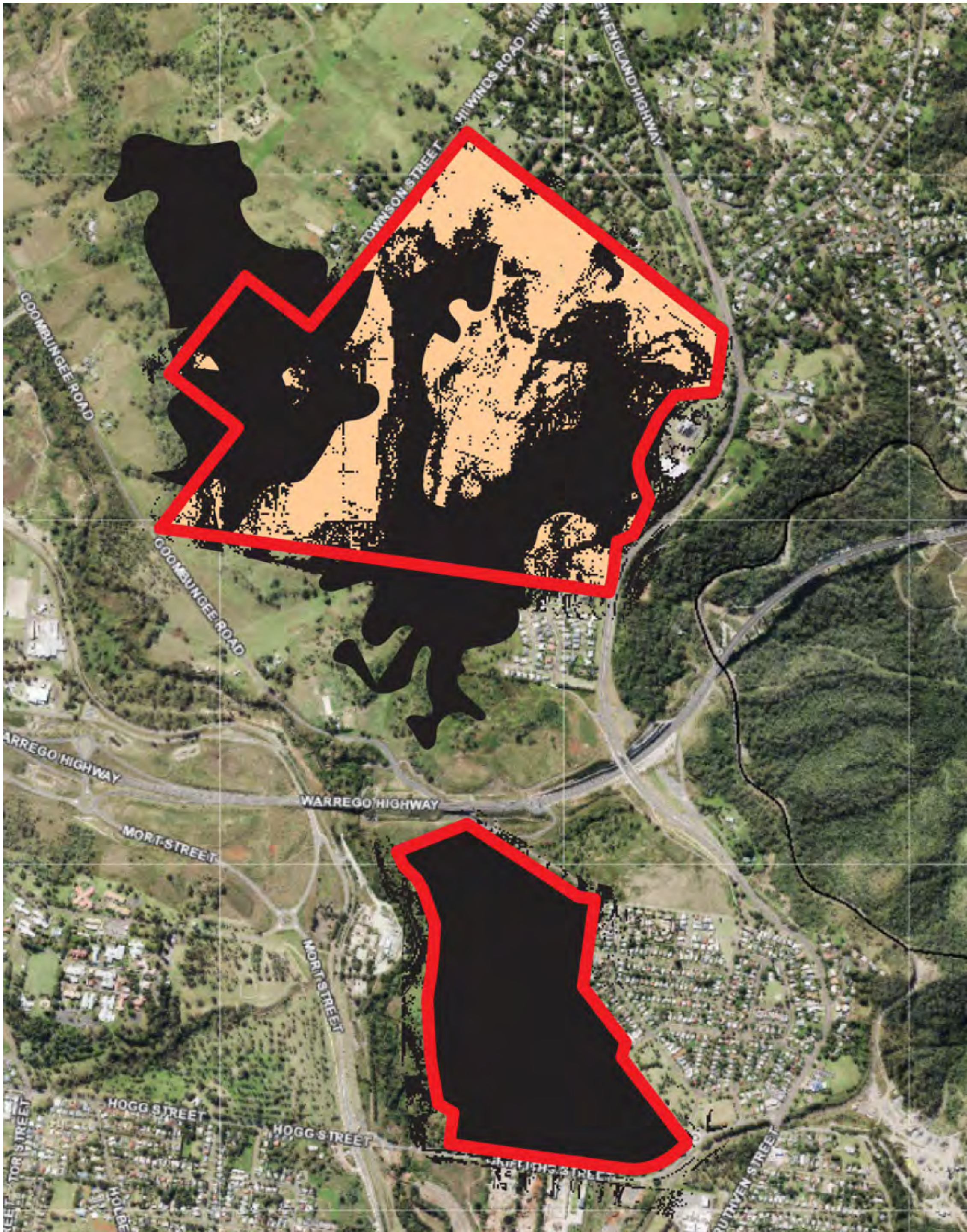
Mt Kynoch

Residual "Available" Areas



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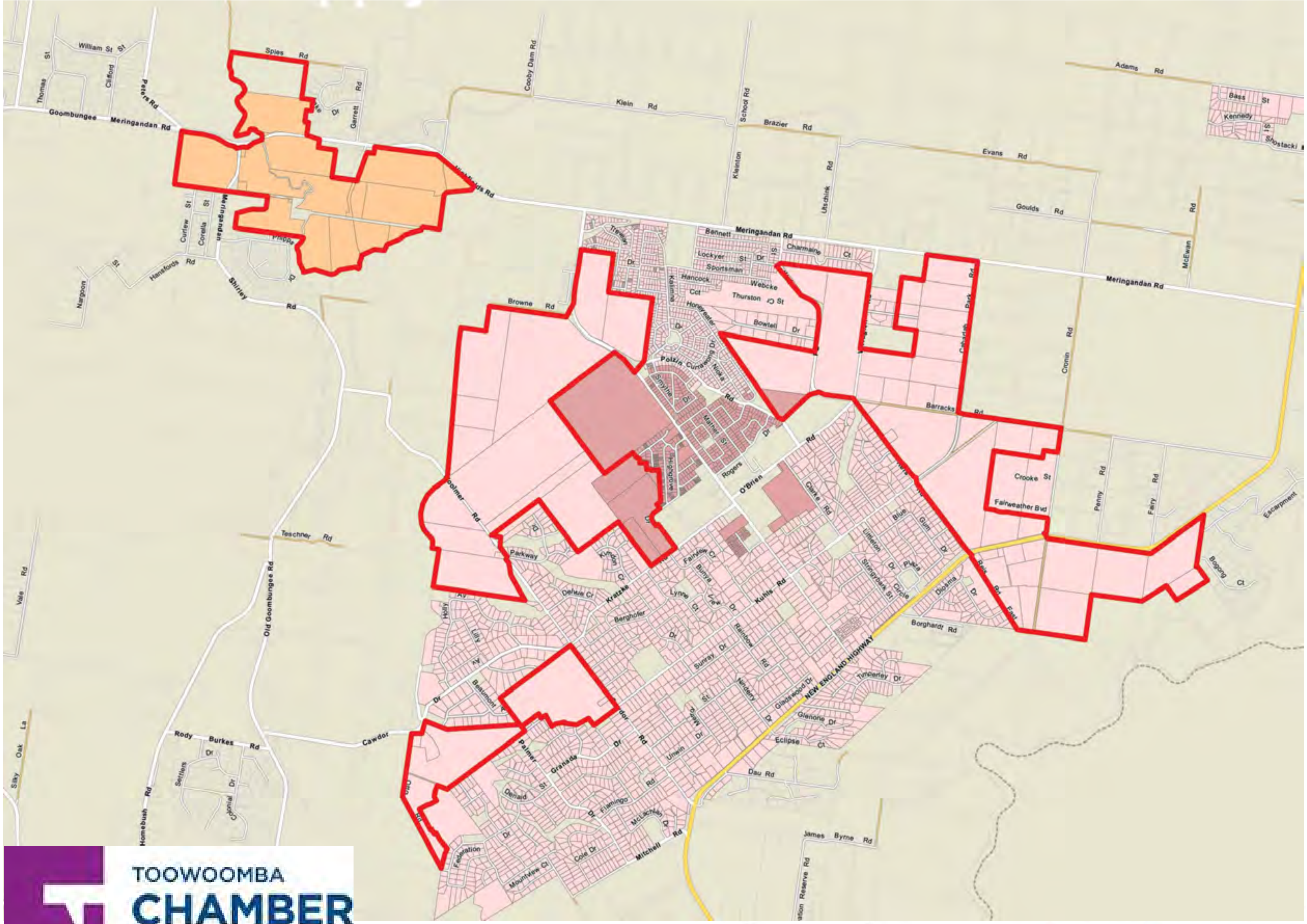
Highfields & Meringandan– “Available” Greenfield Residential Areas identified by Council



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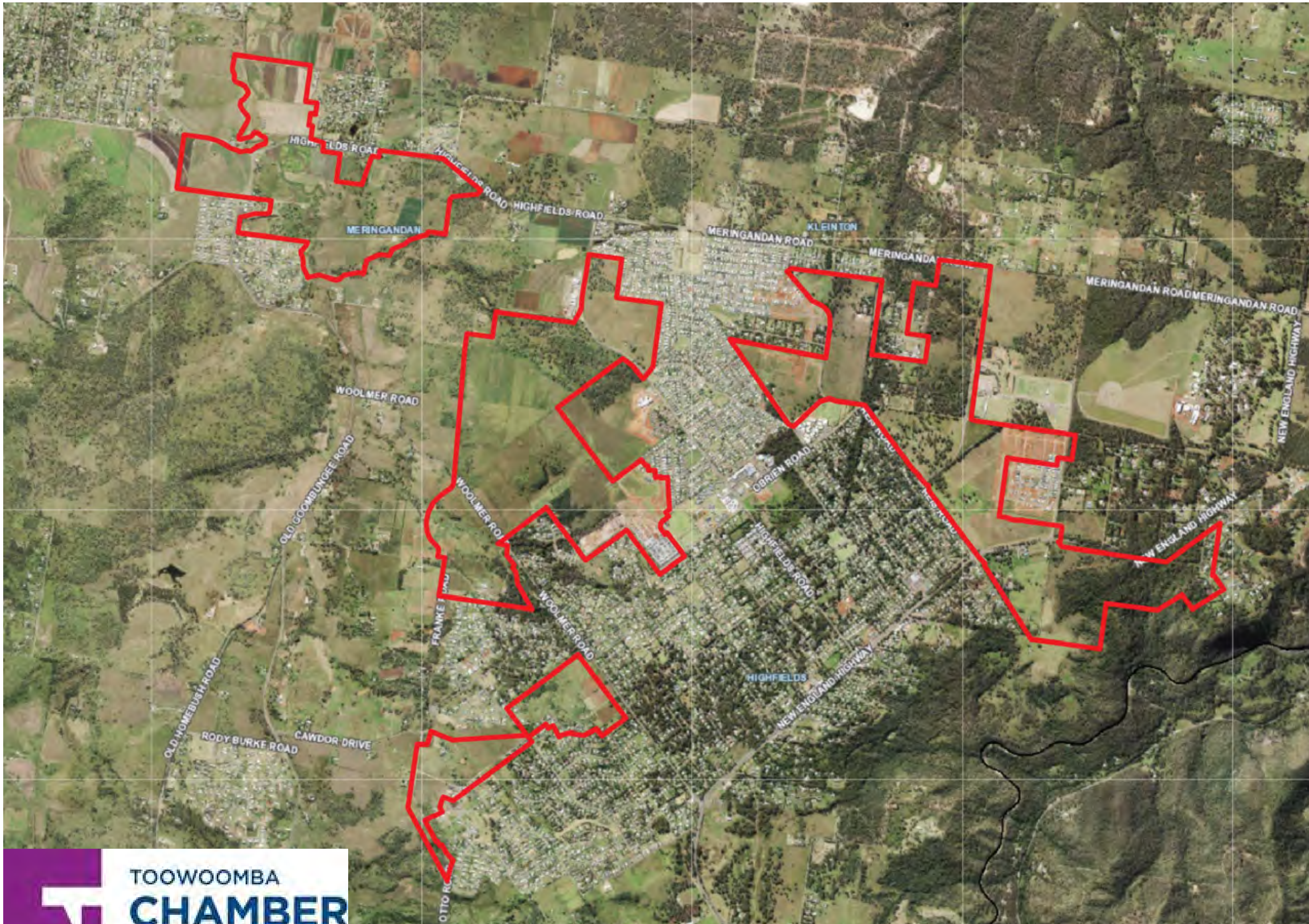
Highfields & Meringandan– “Available” Greenfield Residential Areas identified by Council



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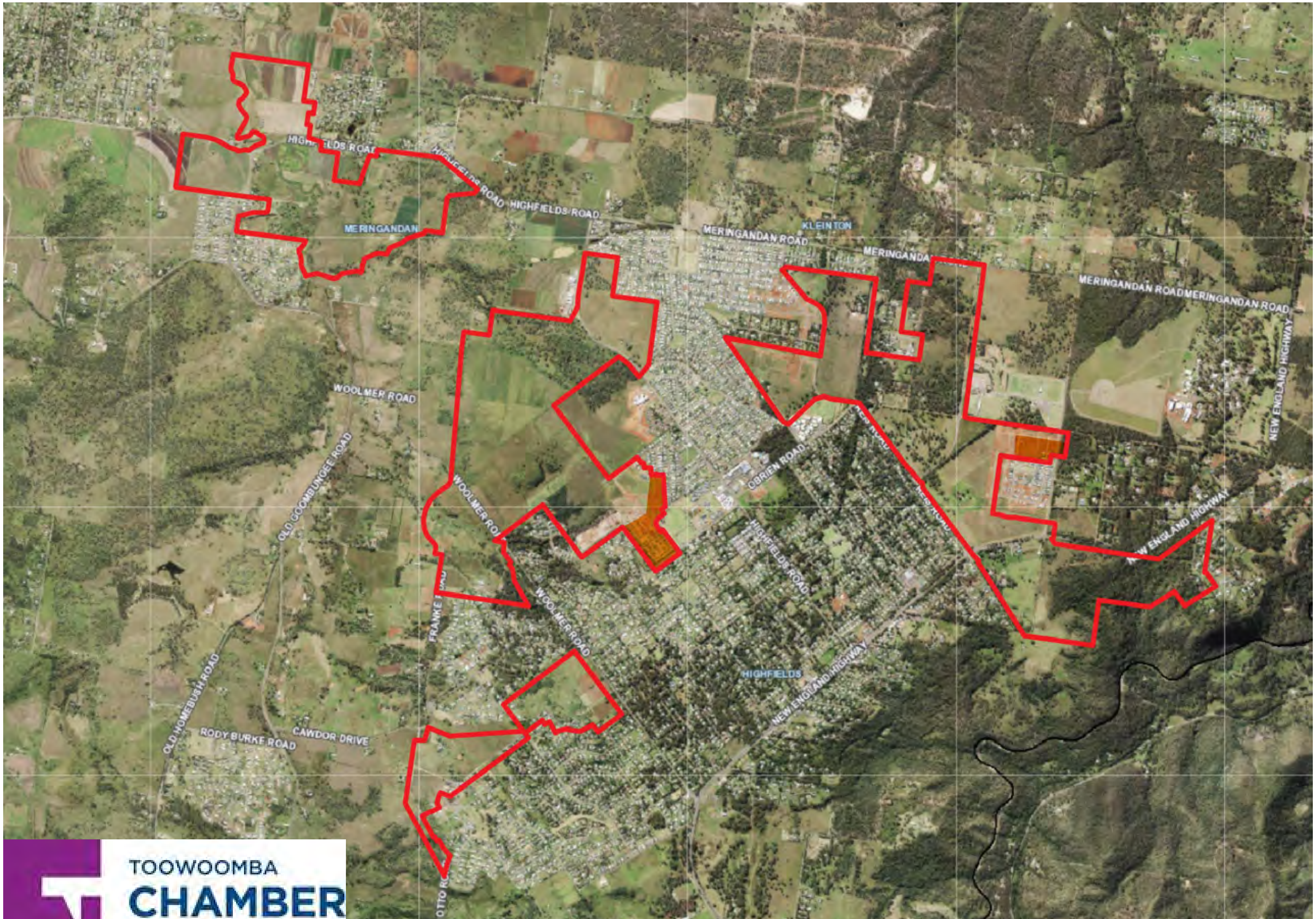
Highfields & Meringandan– Developed Land & Land Used for a Non-residential Purpose



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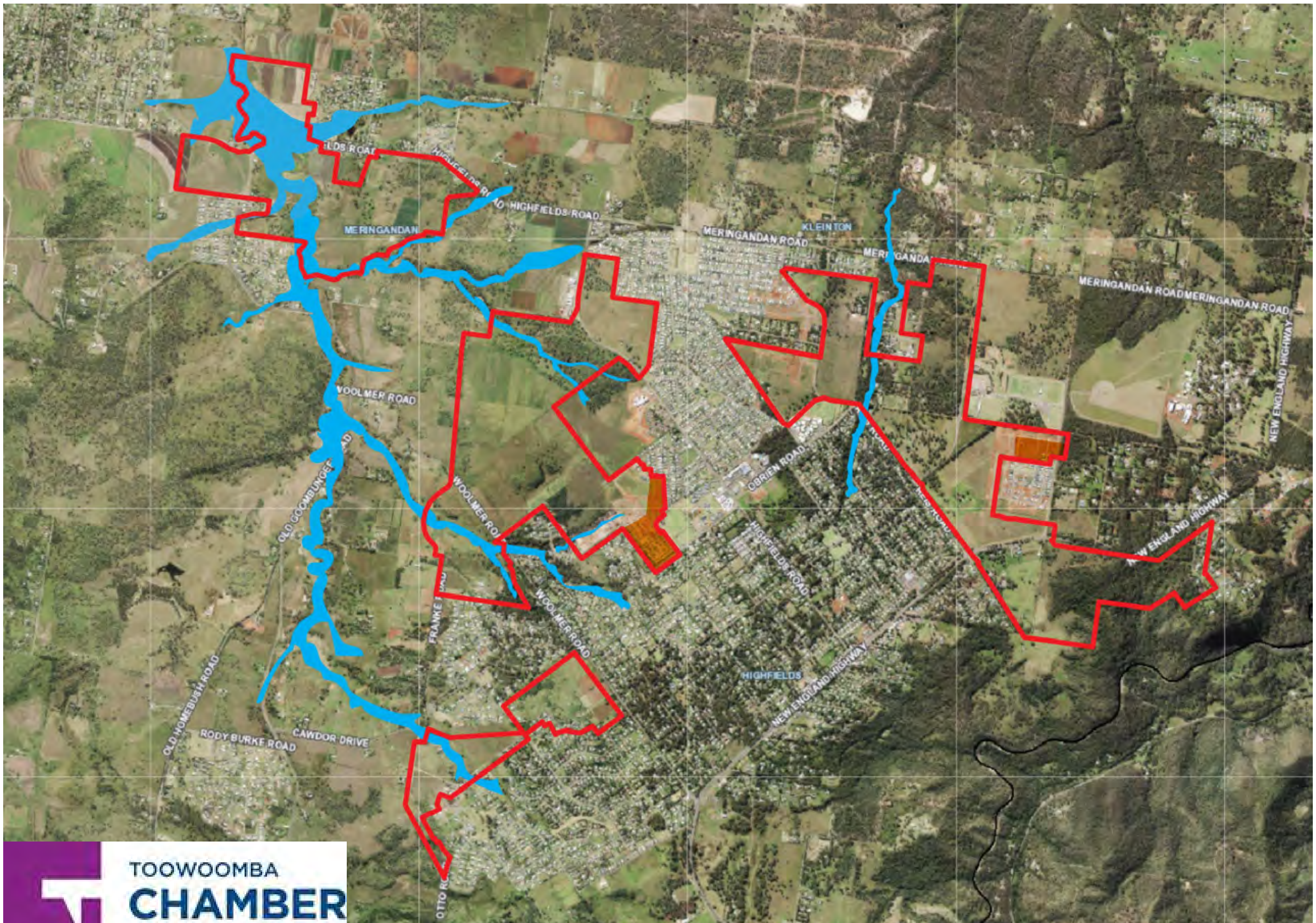
Highfields & Meringandan– Flood Affected Land



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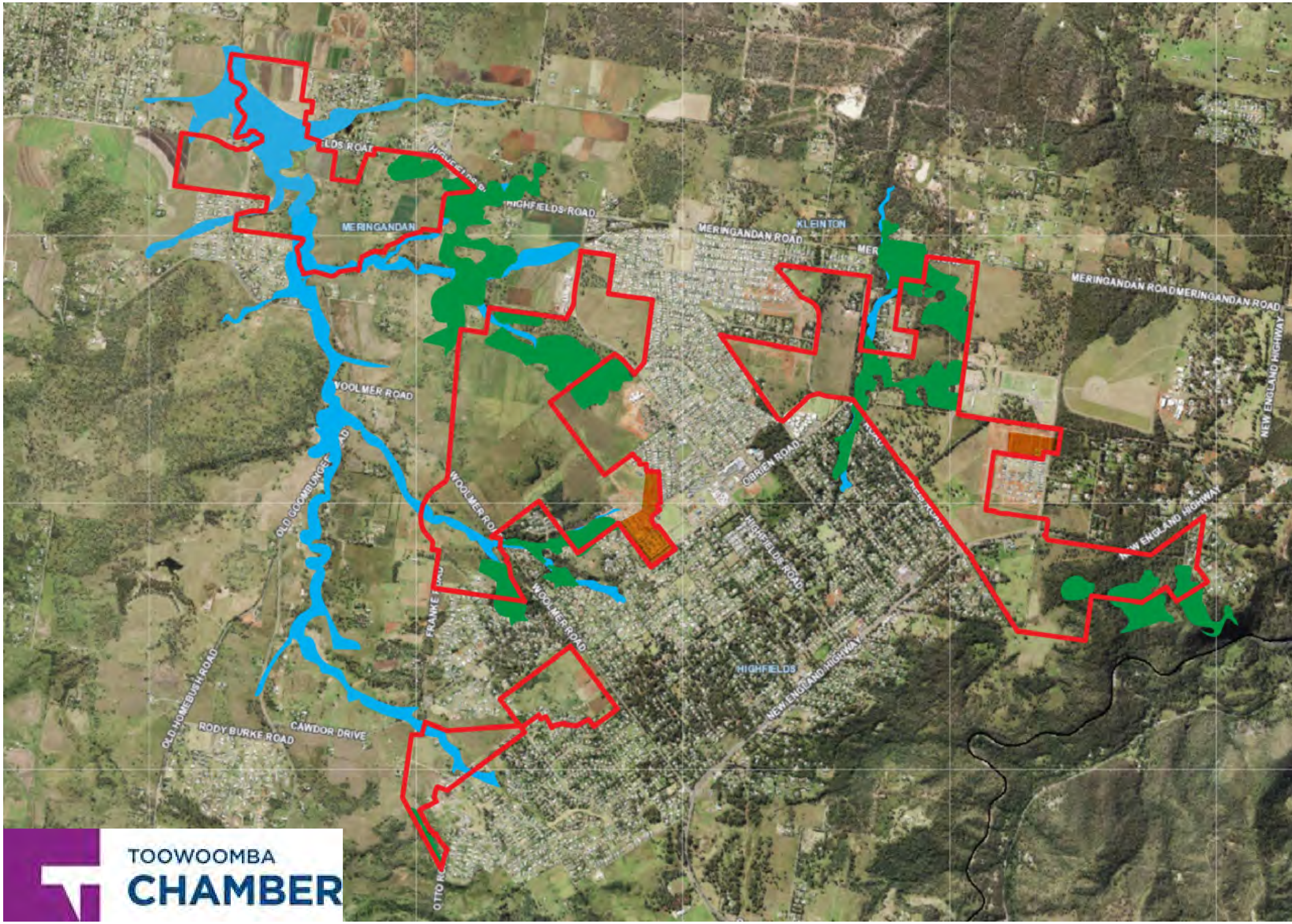
Highfields & Meringandan– Koala Habitat



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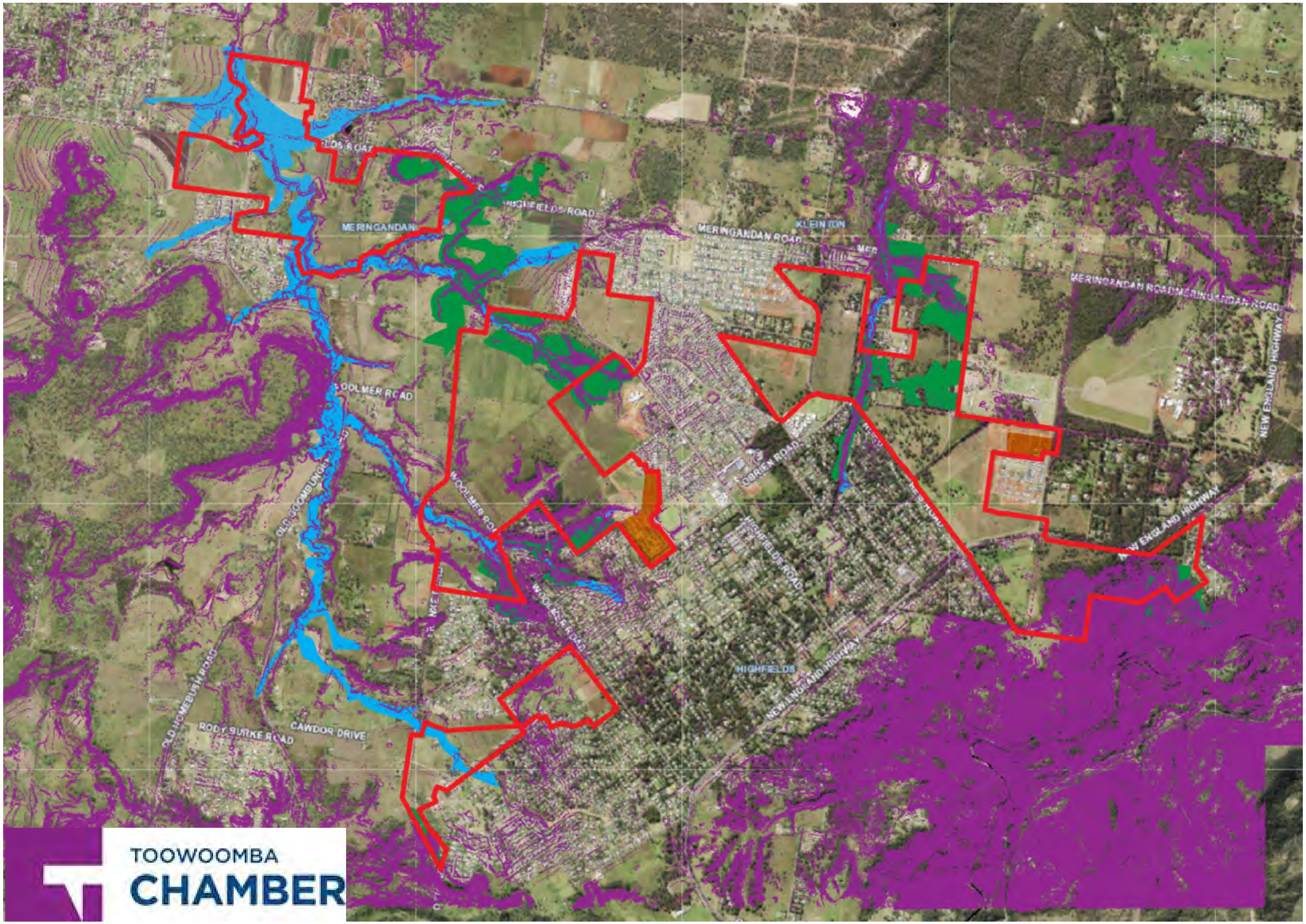
Highfields & Meringandan– Slope > 15%



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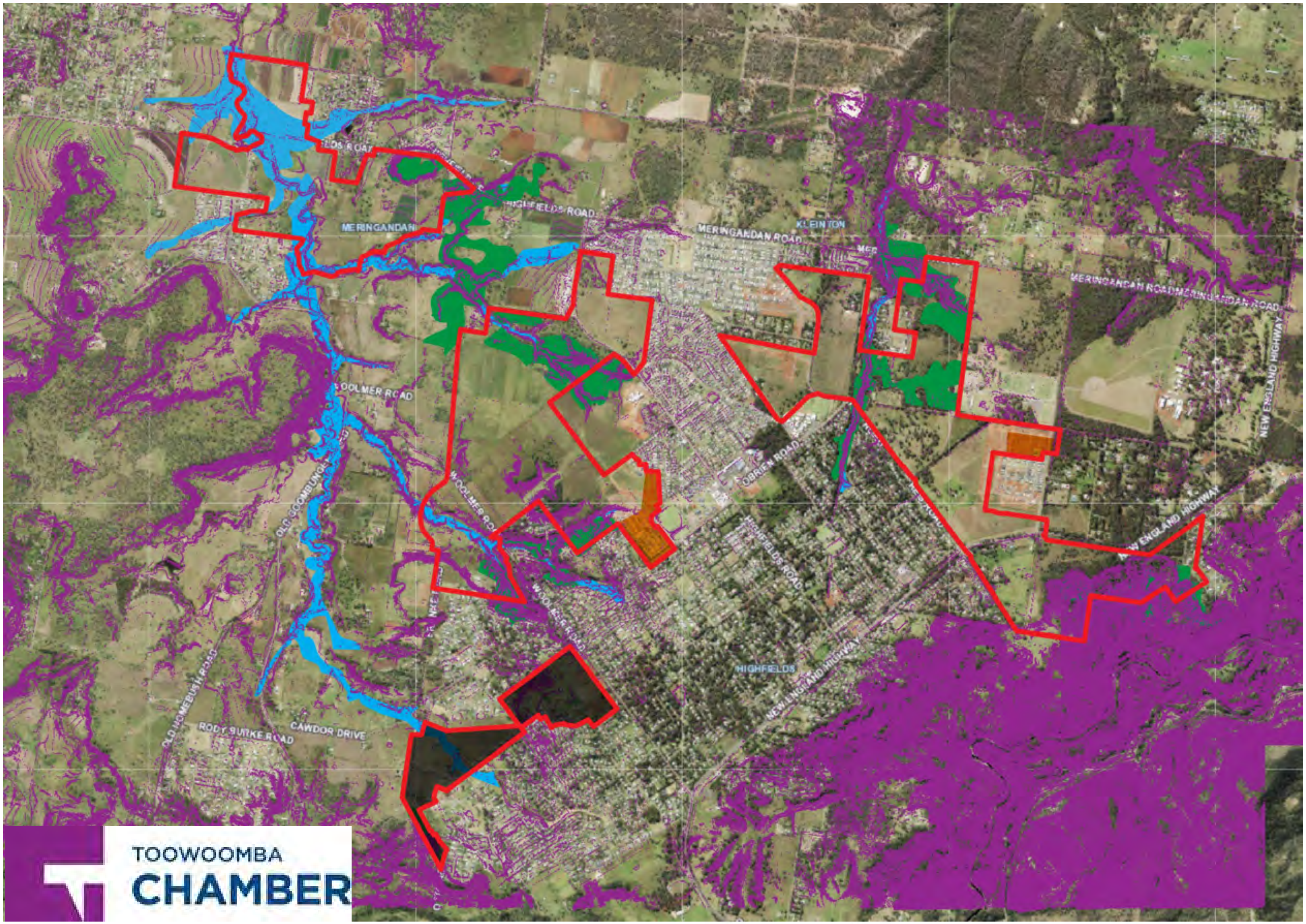
Highfields & Meringandan – Reduced Density (Park Residential Precinct)



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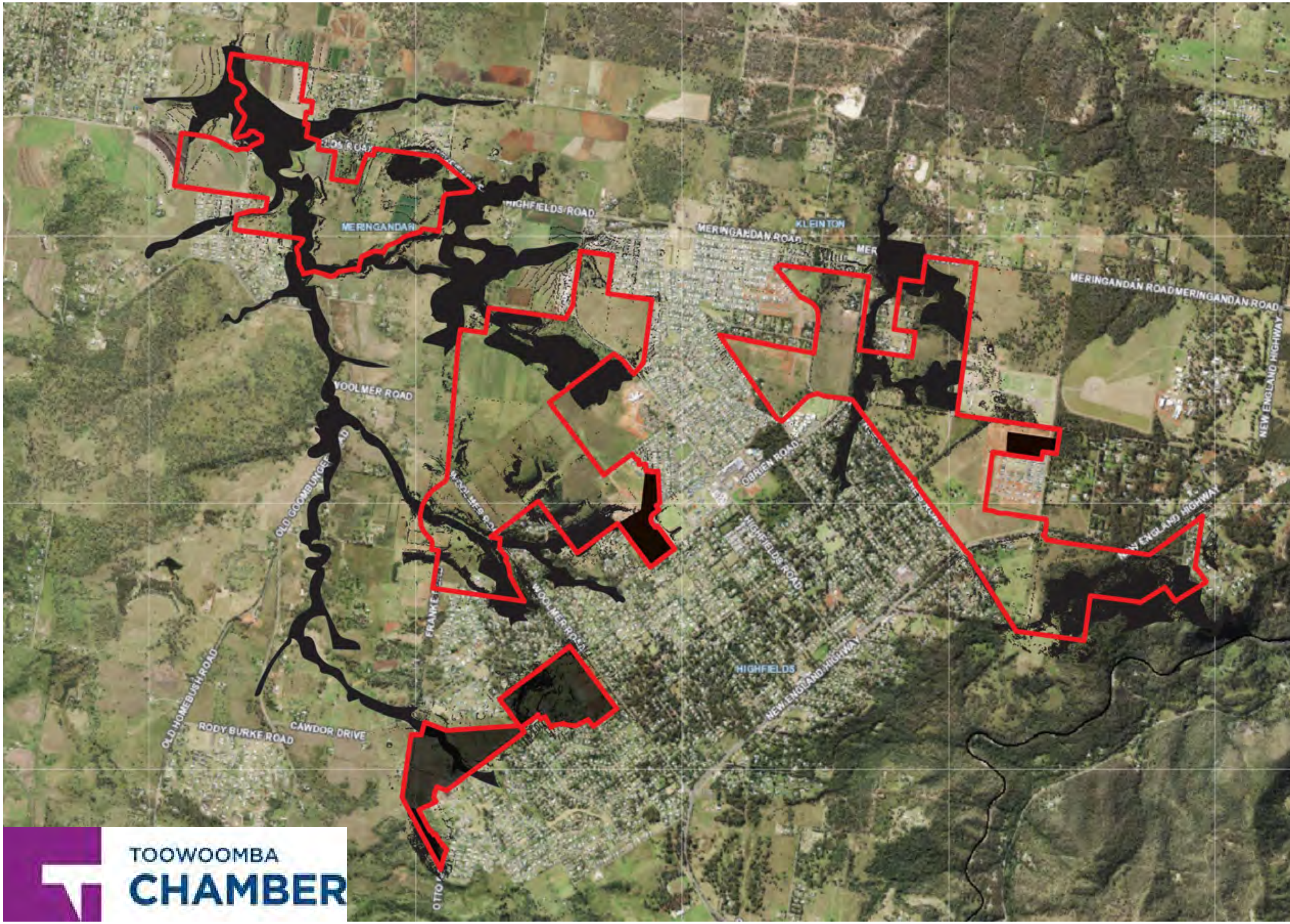
Highfields & Meringandan – Unavailable "Available" Areas



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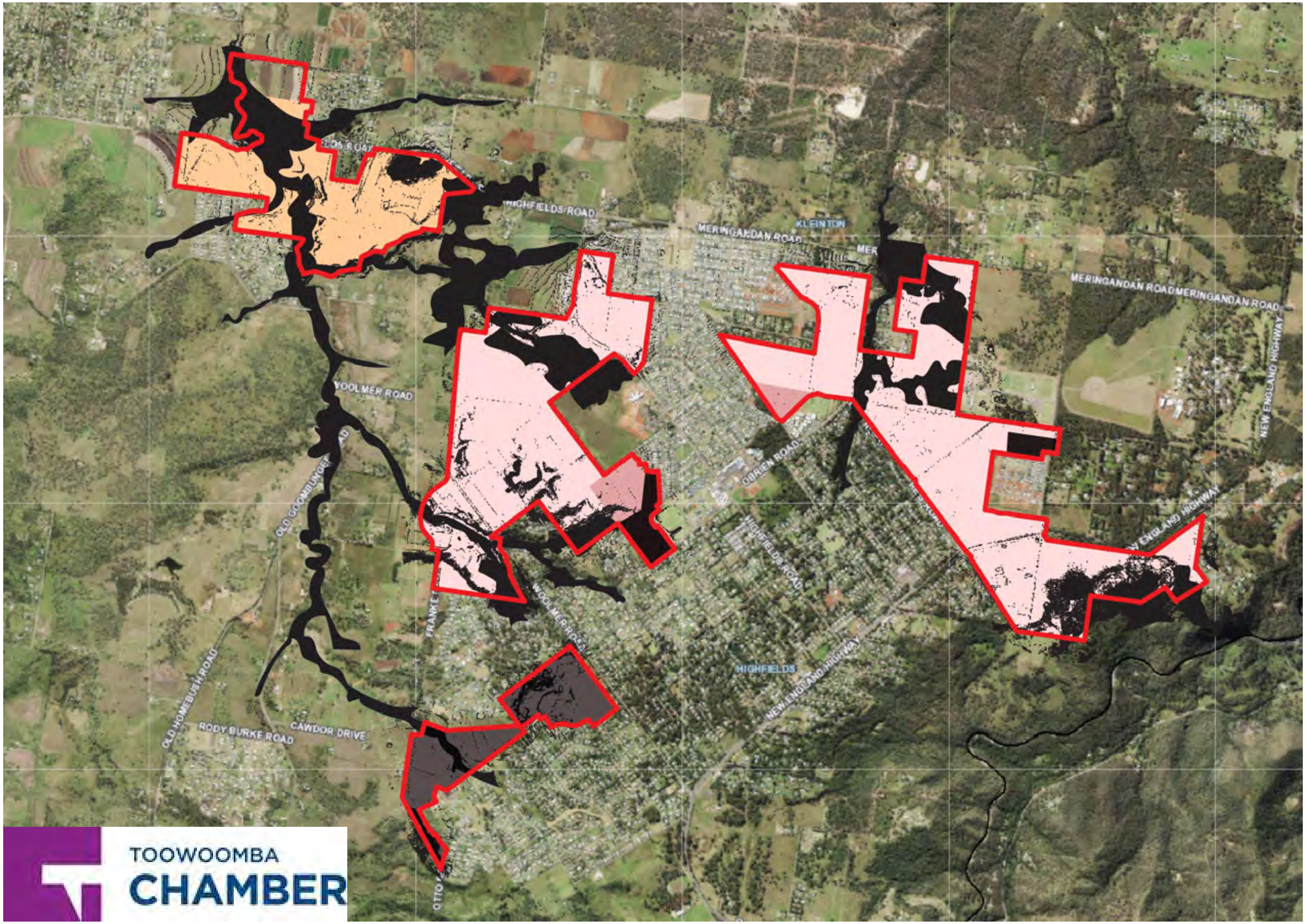
Highfields & Meringandan – Residual “Available” Areas



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Factors affecting timing of land supply

- **Emerging Community Zoned Land**

- **Need for a Preliminary Approval (Variation Request) to render suitable for further development approvals**

- **Past experience is this is an inordinately lengthy, costly and difficult process**

- **Habitat the only significant EC area with an actionable preliminary**

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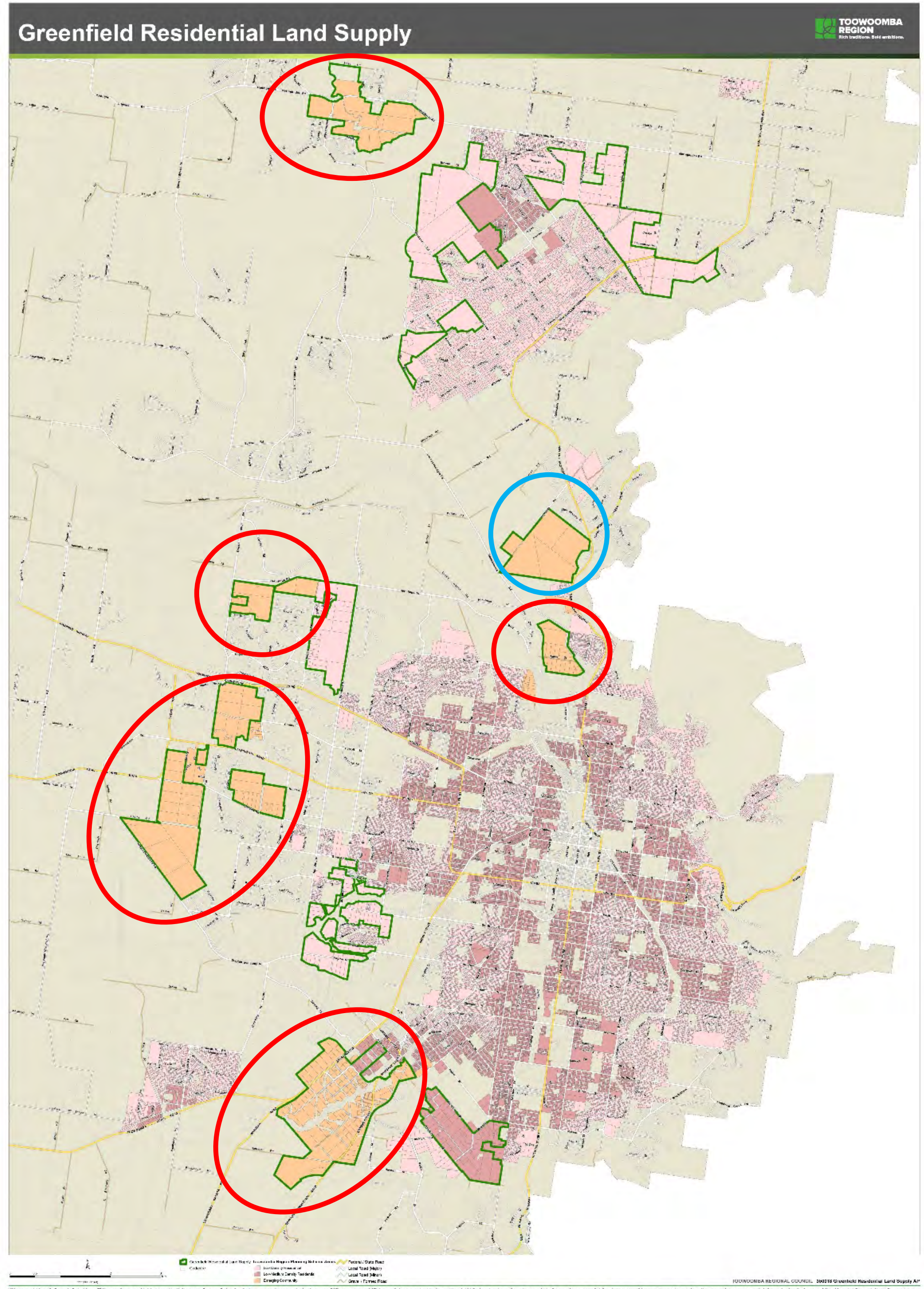

The Preliminary Approval Experience

PRELIMINARY APPROVAL	APPLICATION LODGED	APPLICATION DETERMINED	ASSESSMENT PROCESS TIMEFRAME	OUTCOME
AVENUES OF HIGHFIELDS **500 Lots**	May 2015	April 2016	**1 Year**	Approved
FERNLEIGH **1500 Lots**	July 2016	March 2020	**4 years**	Application Cancelled Project mothballed
HABITAT **800 Lots**	Dec 2017	February 2021	**3 years, 2 months**	Approved
GEORGE WESTON FOODS **800 Lots**	Nov 2016	Not Determined Applicant initiated Appeal	**5 years & 1 month (on-going)**	Court Appeal in progress
EUSTONDALE **500 Lots**	Oct 2016	Not Determined Applicant initiated Appeal	**5 years & 2 months (on-going)**	Court Appeal in progress
GAINSBOROUGH LODGE **55 lots**	Nov 2020	Not Determined – under assessment	**1 year (on-going)**	Under Assessment

Is the message getting through?

TRC Press Release 26 November 2021 (Toowoomba Chronicle): -

- ***Toowoomba Region remains well placed to provide new housing lots for at least the next 5 to 10 years;***
- ***Council is confident there is no imminent shortage of zoned land for residential development***
- ***There are 13 separate housing estates that have additional stage being completed…***
- ***Council expects to approved more than 450 new lots by the end of February***
- ***Moreover, longer term lots currently in early development approval stages (RALs) amount to 650 lots***

The Chamber requested and was provided with further information purporting to substantiate these claims. These have also been verified.

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Is the message getting through?

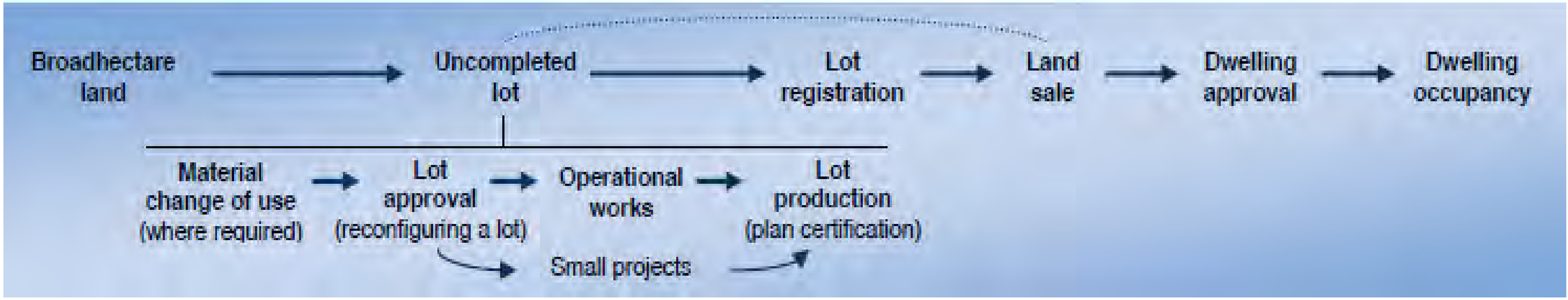
Following further reflection, Council estimate revised down from 450 lots to 365 lots

Residential Estate	Council Lot Supply Estimate	Actual Land Supply (unsold)	
Avenues Stages 5B & 8	41 Lots (combined)	26 lots	
Wyreema Stage 3	40 lots	3 lots	
Peters Road	53 lots	21 lots	
Gowrie Tilgonda	30 lots	18 lots	
Tiley Street	9 lots	Not Known	
The Glen	33 lots	11 lots	
Aspire (Hursley Road)	27 lots	**0 lots**	
Koringa Valley Stage 4	45 lots	**0 lots**	
Santana Park Stage 4	26 lots	**0 lots**	1 lot left in Stage 5
Geddes Rd	3 lots	3 lots	
Sovereign Drive Stage 4	14 lots	11 lots	
Sovereign Drive Stage 5	19 lots	0 lots	No lots available to late 2022
Mt Rascal Road	25 lots	1 lot	
	365 Lots	94 Lots	

Approved or in the Pipeline ?

- **National Property Research Housing Demand Study** p. 3:-

"Active development applications compiled through Toowoomba PD Online and BCI Australia databases confirm ***<u>a development pipeline of 4320 subdivision lots</u>****........"*



- **4320 Lots in the Development Pipeline <u>does not equate to</u> 4320 Approved Lots**

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Today – The Verdict
Tomorrow – The Blueprint

- There must be an admission that there is a problem before it can be fixed
- To address the issue a significant change of policy direction and implementation is required and the implementation of innovative short term and long term solutions
- Solutions will be addressed in Episode 2: The Blueprint

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Today – The Verdict

Tomorrow – The Blueprint

For those still in doubt we have confirmation from Council's appointed specialist consultant:

- **His advice did not conclude there were 27 years supply of land;**
- **That a range of measures are urgently required to address the short term land supply problem.**

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