



Broadhectare profile – Logan City, August 2019





Broadhectare study methodology

This profile contains the results from a broadhectare study of land planned for residential development from parcels with a minimum size of 2,500 m². The broadhectare supply includes only the developable portion of the land parcels after constraints are applied. Constraints, for example flooding or protected vegetation, affect the amount of land available for development.

The study identifies the location of larger land parcels to house future population. It also provides an indication of the timing of development and dwelling yield, based where applicable on the approved number of lots within a development permit. For the remaining land parcels, planning scheme development densities or council advice are applied. The study does not attempt to accommodate the Queensland Government policy intent for housing supply as outlined in the South East Queensland Regional Plan 2017 and described in the Land Supply and Development Monitoring Report prepared by the Department of State Development, Manufacturing, Infrastructure and Planning.

Land supply

The total area of broadhectare land that is suitable and potentially available for residential development in Logan (C) is 9,924 hectares (Table 1). The supply can be further classified by the density of development as follows:

- higher density broadhectare (over 20 dwellings/ha) — 663 hectares
- urban residential broadhectare (between 3 and 20 dw/ha) — 8,461 hectares
- rural residential broadhectare (up to 3 dw/ha) — 800 hectares

Broadhectare dwelling yield

Two scenarios are presented in Table 2 as possible outcomes for the total dwelling supply from broadhectare. A high scenario that assumes all identified supply as suitable and available for residential development. Secondly, a medium scenario showing a lower supply due to the additional factors of land ownership and fragmentation that affect the availability of land.

Table 1 Logan broadhectare supply

Development timeframe	Broadhectare supply				
	Higher density	Standard urban density	Rural density	Total stock	
years	— hectares —				
0 – 2	121	441	611	1,173	
2 ⁺ - 5	276	711	173	1,160	
5 ⁺ – 10	164	2,747	0	2,911	
10 ⁺	10	3,574	16	3,600	
Not specified	93	987	0	1,080	
Total ^(a)	663	8,461	800	9,924	

(a) Components may not sum exactly to totals due to rounding.

Based on the medium scenario, the main points from Table 2 are:

- Broadhectare land could potentially accommodate approximately 123,100 dwellings.
- Higher density development accounts for 18 per cent of the total potential dwelling yield from broadhectare.
- Development at standard urban density accounts for 82 per cent of the total potential broadhectare dwelling yield.

Table 2 Logan broadhectare dwelling yield by timeframe

Dovelopment		High scena	ario			Medium sc	enario	
timeframe	Higher density	Standard urban density	Rural density	Total dwellings	Higher density	Standard urban density	Rural density	Total dwellings
years		— dwellings	_			— dwellin	ngs —	
0 – 2	3,526	5,606	711	9,843	3,526	5,606	711	9,843
2 ⁺ - 5	8,117	9,720	205	18,042	8,117	8,931	192	17,240
5 ⁺ – 10	5,331	33,225	0	38,556	5,331	32,648	0	37,979
10 ⁺	261	45,074	80	45,415	261	44,866	80	45,207
Not specified	4,351	14,778	0	19,130	4,351	8,443	0	12,795
Total ^(a)	21,587	108,403	996	130,986	21,587	100,494	982	123,063

(a) Components may not sum exactly to totals due to rounding.

Broadhectare land characteristics

Stock composition

For all broadhectare parcels, the difference between the overall parcel area (14,409 hectares) and the area available for development (9,924 hectares) indicates that some parcels are affected by physical or environmental constraints.

The main points from Table 3 are:

- Broadhectare stock is contained within 1,794 land parcels.
- Broadhectare parcels between 0.25 and < 1.2 hectares make up 50 per cent of all parcels.
- Parcels larger than 10 hectares account for 71 per cent of the dwelling supply in the medium scenario.

Table 3 Logan broadhectare supply by parcel size

Parcel size Land Total area	Bro	Broadhectare area		Medium scenario				
categories	parcels	of parcels	Urban residential	Rural residential	Total hectares	Urban residential ^(a)	Rural residential	Total
hectares	number	hectares		— hectares —			— dwellings —	
0.25 < 1.2	897	556	489	0	489	9,749	0	9,749
1.2 < 2.0	133	206	152	15	167	2,941	27	2,968
2.0 < 5.0	557	1,654	1,149	49	1,198	17,808	148	17,956
5.0 < 10.0	64	422	255	49	303	4,446	82	4,528
10.0+	143	11,571	7,080	688	7,768	87,137	725	87,862
Total ^(b)	1,794	14,409	9,124	800	9,924	122,081	982	123,063

(a) Includes dwellings at higher and standard urban densities.

(b) Components may not sum exactly to totals due to rounding.

Approved land development

For this study, approved land development is identified by the presence of a current development permit issued by a council or planning authority over a broadhectare parcel, either for reconfiguring of a lot or a material change of use.

Approximately 1,387 hectares of approved land development potentially yielding up to 15,500 dwellings

Major broadhectare contributors

The Greater Flagstone and Yarrabilba Priority Development Areas (PDA) and council's Park Ridge Structure Plan (SP) are the major contributors to broadhectare land supply and potential dwelling supply.

- The Greater Flagstone PDA accounts for 4,455 hectares (approximately 45 per cent of the total broadhectare land supply) with a potential yield of 51,100 dwellings (approximately 41 per cent of all dwellings from broadhectare supply).
- The Yarrabilba PDA accounts for 1,113 hectares (approximately 11 per cent of the total broadhectare land supply) with a potential yield of 17,500 dwellings (approximately 14 per cent of all dwellings from broadhectare supply).
- There are 648 hectares of broadhectare land supply within the Park Ridge SP (approximately 7 per cent of the total land broadhectare supply), with a potential yield of 13,600 dwellings (approximately 11 per cent of all dwellings from broadhectare supply).

Leading suburbs for broadhectare land

The leading suburbs for supply of broadhectare land and dwellings are shown in Table 4.

	Broadhectare		Dwellings ^(a)
Suburb	hectares	Suburb	dwellings
Undullah	2,808	Undullah	32,195
New Beith	1,523	Yarrabilba	15,941
Yarrabilba	1,019	New Beith	14,618
Jimboomba	931	Logan Reserve	12,538
Greenbank	756	Jimboomba	11,478

Table 4 Logan leading suburbs for broadhectare and dwelling supply

(a) Dwelling count based on high scenario.

Small-scale developments

For this study, development approvals for reconfiguring a lot that yield less than 10 dwellings are considered small-scale. If a large proportion of development approvals are of a smaller scale, then this could indicate a limited number of larger broadhectare parcels available for development. For Logan (C), as at December 2018 there were:

- 209 small-scale development approvals yielding a total of 524 dwellings.
- Small-scale approvals represent 59 per cent of total development approvals.

Emerging land supply

A key issue when discussing land supply is the sale price of developed lots. Variations in supply may lead to changes in average sale price. A leading indicator to monitor this link is changes in the sale price of broadhectare land parcels in the expansion area. For this study, the definition of expansion area is based on the South East Queensland Regional Plan 2017 (ShapingSEQ). Land supply outside the existing urban area as defined by the statutory plan, is known as expansion and within, consolidation.

Lot registration data were used to identify consumption of expansion area broadhectare supply since the 2013 Broadhectare study. In Figure 1, the 2013 supply is compared with the equivalent from the 2019 study and the average price per hectare from sales of parcels identified in the 2013 study.

Based on sales of broadhectare parcels:

- the average price per hectare for broadhectare land is \$710,000 for the year ending December 2018
- an overall increase of \$150,000 in the annual average price per hectare of broadhectare land since 2013

Broadhectare dwelling characteristics

Total potential dwelling supply

Ownership and fragmentation of land parcels are potential constraints to residential land supply that are not easily measured. Owners' intentions can impact the

availability of land for development and consequently reduce apparent land supply. Fragmentation of land has a similar impact, particularly due to its effect on factors of development such as economic viability of a project and infrastructure provision. To reflect their impact on land supply and the associated dwelling supply, adjustments have been made to the broadhectare stock. For this study, propensity of development rates have been applied to those land parcels not subject to development approvals, or within a PDA or SP.

To determine overall dwelling supply for this study, the number of approved multiple dwellings (generally attached dwellings) that are awaiting commencement or completion have been added to the broadhectare dwelling supply. Also included are lots below 2,500 square metres that have been developed and are vacant. Dwelling supply based on these components indicates a total potential of approximately 128,100 dwellings (Table 5).

Dwelling demand

Not all future dwelling demand will be accommodated through development of broadhectare land. Nevertheless, an indicator of the status of dwelling supply (from broadhectare, vacant lots and approved multiple dwellings), using a medium dwelling supply scenario, can be determined by using dwelling projections as an indicator of future demand. To assess the supply, the Queensland Government's dwelling projection series — low, medium and high, have been used (Figure 2).

Table 5 Logan dwelling scenarios

Potential residential dwelling supply					
Broadhectare	ctare Existing vacant Approved multiple Total potential				
dwelling supply ^(b)	land parcels ^(c)	dwellings ^{(d)(e)}	dwellings		
123,063	3,636	1,400	128,099		

(a) Queensland Government household and dwelling projections, 2018 edition.

(b) Medium scenario potential dwelling supply as per Table 2.

(c) Estimate of vacant residential lots at December 2018.

Figure 2 Logan dwelling scenarios



Projected dwelling den	nand to 2041 ^(a)	Supply (years)
Low series	59,857	n.a*
Medium series	76,051	n.a*
High series	94,980	n.a*

(d) Number of approved multiple dwellings awaiting commencement or completion as at December quarter 2018.

(e) Overlaps with broadhectare have been removed.

n.a* Supply is beyond projection range.

- Logan (C) is projected to require between 59,900 and 95,000 dwellings to 2041
- Dwelling supply is beyond the current projection range



Figure 1 Logan expansion area broadhectare



Broadhectare population characteristics

An indication of the population capacity achievable from the broadhectare land can be estimated using household size and dwelling yields. A comparison with the projected population increase can flag potential gaps between demand and land supply. However, further development in existing residential areas via infill development could also accommodate additional population.

Estimated resident population

The estimated resident population of Logan (C):

- 326,615 persons as at 30 June 2018 (Source: ABS 3218.0).
- Projected to rise to between 502,500 (low series) and 614,900 (high series) persons by 2041 (Source: Queensland Government household and dwelling projections, 2018 edition). This represents an increase of between 175,900 persons (low series) and 288,300 persons (high series) by 2041.

Average household size

• The average household size for private dwellings in Logan (C) at the time of the 2016 census was 3.1 and 2.1 persons for houses and attached dwellings respectively. Table 6 shows a range of population yield outcomes based on a range of household sizes for broadhectare land in each density category.

Table 6 Logan broadhectare population yields based on a range of household sizes (persons)

Development type	Dwellings (Medium	Household size				
Development type			– average p	persons per hous	sehold —	
	sociario)	2.7	2.9	3.1	3.3	3.5
Houses		Possible population yield				
Rural residential	982	2,651	2,848	3,044	3,241	3,437
Standard urban density residential	100,494	271,334	291,433	311,531	331,630	351,729
		 average persons per household — 				
		1.7	1.9	2.1	2.3	2.5
Attached dwellings			Possib	le population y	vield	
Higher density residential	21,587	36,698	41,015	45,333	49,650	53,968
Total	123,063	310,683	335,296	359,908	384,521	409,134

Dwellings constructed on broadhectare land have the potential to accommodate between 310,700 and 409,100 persons

Conclusion

The total area of broadhectare land currently available for residential development is 9,924 hectares. Under a medium supply scenario, this land has the potential to yield approximately 123,100 dwellings and accommodate 359,900 persons.

Based on current medium series for dwelling projections and dwelling supply as defined in this study, the available residential land stock indicates an adequate supply that is beyond the current projection range.



Abbreviations

- **ABS** Australian Bureau of Statistics
- PDA priority development area
- QVAS Queensland Valuations and Sales System
- SP structure plan

Explanatory notes

Approved multiple dwellings

Multiple dwelling developments, subject to material change of use (MCU) approvals, include those where there is more than one self-contained dwelling approved for a parcel, or where there is one dwelling per lot and they are subject to a Community Title Scheme. A dwelling must include a kitchen and a bathroom to be assessed as self-contained. Examples include relative's accommodation, dual occupancies/duplexes, flats, units, townhouses, villas, apartments and includes short-term accommodation.

Relocatable homes, tourist accommodation, and dwellings approved in retirement villages/facilities are included where they are self-contained. Group accommodation where facilities are shared and purpose-built student accommodation are not included.

Broadhectare average price in expansion area

The supply was determined by filtering the 2013 broadhectare parcels to include only parcels in the expansion area that were zoned for detached dwellings. Average price per hectare was calculated by using the value from QVAS sales data of broadhectare parcels divided by their title area. In addition to changes in supply and demand, variations in the average price from year to year are influenced by diversity in the attributes of the parcels sold, including:

- potential dwelling density
- the portion of the parcel that is developable
- proximity of parcels to infrastructure.

Broadhectare supply

Broadhectare refers to land planned for residential development from parcels with a minimum size of 2,500 m². Broadhectare supply includes only the developable portion of the land parcels after constraints, that limit the amount of land available for development, are applied.

Digital Cadastral Database

A spatial dataset containing the property boundaries and related property description of all land parcels in Queensland.

Expansion area

Areas identified in the South East Queensland Regional Plan 2017 (ShapingSEQ) for development outside the existing urban area boundary.

Higher density

Development on broadhectare yielding greater than 20 dwellings per hectare.

Household size

Calculation is based on count of all persons present in the dwelling on census night, including visitors from within Australia. Excludes usual residents who were temporarily absent on census night (2016).

Land fragmentation

An issue affecting development of land due to the location and shape of land.

Land Supply and Development Monitoring Report

The Department of State Development, Manufacturing, Infrastructure and Planning's Land Supply and Development Monitoring (LSDM) Report applies a different approach to determining residential land supply, including:

- the timing of preparation of the supply inputs
- the development potential of parcels smaller than 2,500 m² that are not subject to an MCU approval
- the treatment of planning scheme development densities and constraints that affect the developable portion of parcels
- separately identifying dwelling supply for expansion and consolidation areas
- the treatment of land availability
- using the South East Queensland Regional Plan 2017 expected dwelling growth policy intent to measure years of supply.

Local government area (LGA)

A geographical area under the responsibility of a local government council or an Indigenous council. There are 78 LGAs in Queensland.

Propensity of development rate

A rate applied to a grouping of broadhectare parcels to indicate the availability for development.

Priority development area

Priority development areas (PDAs) are parcels of land within Queensland, identified under the *Economic Development Act* 2012 for specific accelerated development, with a focus on economic growth.

Reconfiguring a lot

The potential scale of residential land development can be measured by the number of lots approved as part of a development permit. This type of permit is known as 'reconfiguring a lot' and is often referred to as land subdivision approval.

Rural residential density

Development on broadhectare parcels that will yield less than 3 dwellings per hectare.

Standard urban density

Development on broadhectare yielding from 3 to 20 dwellings per hectare.

Structure plan area

Parcels subject to a structure plan which sets out a vision for the future development of a place by establishing a planning and management framework to guide development.



Broadhectare study map - Logan City Local Government Area (LGA), 2019



Timeframe	Urban residential	Low density residential
0 – 2 years	🔴 562 ha	611 ha
2 – 5 years	987 ha	173 ha
5 – 10 years	o 2,911 ha	0 ha
10+ years	a,584 ha	16 ha
Not specified	1,080 ha	0 ha
Land suitable and development. Tin Other map featu	d potentially available neframes are indicat res nt Major roads	e for residential ive only. Priority development
Structure p	plan area	area