Broadhectare study 2013 profile

Moreton Bay Regional Council

Introduction

The preliminary estimated resident population of Moreton Bay Regional Council (hereafter referred to as Moreton Bay) at 30 June 2012 was 400,000 persons (Source: ABS 3218.0). This is expected to increase to between 480,000 (low series) and 510,000 (high series) persons by 2021, representing population growth over the 2012–2021 period of between 80,000 (low series) and 110,000 (high series) (Source: Queensland Government Population Projections, 2013 edition).

Land stock

The total area of broadhectare land available in Moreton Bay for residential development is 3,526 hectares, representing only a very small percentage of the total land area (Tables 1 and 2). This excludes the Caboolture West Master Planned Area (Caboolture West MPA) declared in 2012, which is subject to further investigation and planning by the Council.

Broadhectare land is defined as the amount of unconstrained residential land under the current planning scheme including existing residential developments approved by council. For this study, only land parcels that are expected to yield three or more dwellings have been included.

Broadhectare land can be further classified as follows:

- urban residential broadhectare land — 2,325 hectares
- rural residential broadhectare land — 1,201 hectares.

The broadhectare study refers to ‘rural residential’ development as yielding three dwellings or less per hectare, or as otherwise described in the planning scheme. Whilst development at ‘standard urban density’ and ‘higher density’ is classified as yielding between 4 to 20 dwellings and greater than 20 dwellings per hectare respectively.

Table 1 Moreton Bay land use profile

Land use category	Area	% of total
Suitable for urban residential broadhectare development	2,325 ha	1.14%
Suitable for rural residential broadhectare development	1,201 ha	0.59%
Assumed existing urban residential use	8,562 ha	4.19%
Assumed existing rural residential residential use	25,623 ha	12.55%
Roads, watercourses and railway casements	21,199 ha	10.38%
Rural/Green/Open space	138,149 ha	67.64%
Balance area [(a)]	7,188 ha	3.52%

(a) Includes all land uses other than residential

Dwelling yields

Table 2 shows 'theoretical dwelling yield' (the potential number of dwellings that could be constructed based on the identified land stock) and 'expected dwelling yield' (which takes into account factors affecting development of land such as ownership and land fragmentation).

Table 2 Moreton Bay broadhectare stock and dwelling yield [a]

	Broadhectare stock (hectares)				Theoretical	Expected dwelling yield (dwellings)[c]			
Timeframe	Higher density	Standard urban density	Rural density	Total stock	dwelling yield (dwellings)[b]	Higher density	Standard urban density	Rural density	Total dwellings
0–<2 years	31	577	787	1,396	7,858	1,020	6,358	480	7,858
2–<5 years	107	480	204	791	9,389	3,567	3,618	138	7,323
5–<10 years	133	411	111	655	8,891	4,139	2,750	87	6,976
10+ years	68	495	83	646	7,232	2,137	2,662	78	4,877
Not specified	4	18	16	37	224	88	41	18	147
Total	**343**	**1,981**	**1,201**	**3,526**	**33,595**	**10,952**	**15,430**	**801**	**27,183**

(a) Components may not sum exactly to totals due to rounding.
(b) Yield if all broadhectare stock is developed irrespective of ownership and/or fragmentation.
(c) Yield has been reduced to account for likelihood of development due to factors such as ownership and fragmentation.

The main points from Table 2 are:

- Broadhectare land is likely to yield approximately 27,200 dwellings.
- Development at higher density accounts for almost 40 per cent of the total expected dwelling yield.
- Development at standard urban density will account for 57 per cent of the total expected dwelling yield.

Stock composition

The broadhectare stock in Moreton Bay is contained primarily within land parcels greater than 10 hectares in area (Table 3). For all broadhectare parcels, the difference between the overall parcel area (4,149 hectares) and the area available for development (3,526 hectares) indicates that some parcels are affected by constraints or may have areas committed to open space. The main points from Table 3 include:

- Residential stock is contained within 1,128 land parcels.
- Parcels less than or equal to 1.2 hectares account for 46 per cent of all parcels.
- Of the urban broadhectare stock, 38 per cent is contained in parcels sized 10 hectares or more.
- Parcels sized 10 hectares or more account for 39 per cent of the expected total dwelling yield from broadhectare land.

Table 3 Moreton Bay broadhectare stock composition [a]

Parcel size categories (hectares)	Land parcels (number)	Total area of parcels (hectares)	Broadhectare area (hectares)			Expected dwelling yield (number)		
			Urban residential [b]	Rural residential	Total stock	Urban residential [b]	Rural residential	Total dwellings
<= 1.2	514	371	383	61	443	4,323	29	4,351
1.3–2.0	237	413	326	42	368	3,119	69	3,188
2.1–4.9	237	720	496	115	611	6,082	146	6,228
5.0–9.9	57	399	247	77	324	2,786	92	2,878
10.0+	83	2,245	873	906	1,779	10,071	465	10,537
Total	**1,128**	**4,149**	**2,325**	**1,201**	**3,526**	**26,382**	**801**	**27,183**

(a) Components may not sum exactly to totals due to rounding.
(b) Includes dwellings at higher and standard urban densities.

Population capacity

Average household size for occupied private dwellings in Moreton Bay at the time of the 2011 Census was 2.8 and 1.8 persons for houses and attached dwellings respectively. Table 4 shows a range of possible population yields for the total identified broadhectare stock in each density category by a range of household sizes. The current household sizes at the time of the 2011 Census are highlighted.

The main finding from Table 4 is that, depending on average household size, land from broadhectare development could accommodate between 54,300 and 76,000 people. Further development in existing residential areas, where the parcel size is less than 2,500 square metres could also accommodate additional population.

Table 4 Moreton Bay population yields based on a range of household sizes (persons) [(a)]

Development type	Number of dwellings	Household size (average persons per household)				
		2.4	2.6	2.8	3.0	3.2
		Possible population yield				
Rural residential	801	1,922	2,082	2,242	2,402	2,563
Standard urban density residential	15,430	37,031	40,117	43,203	46,289	49,375
		Household size (average persons per household)				
		1.4	1.6	1.8	2.0	2.2
		Possible population yield				
Higher density residential	10,952	15,333	17,523	19,714	21,904	24,095
Total	**27,183**	**54,286**	**59,722**	**65,159**	**70,595**	**76,032**

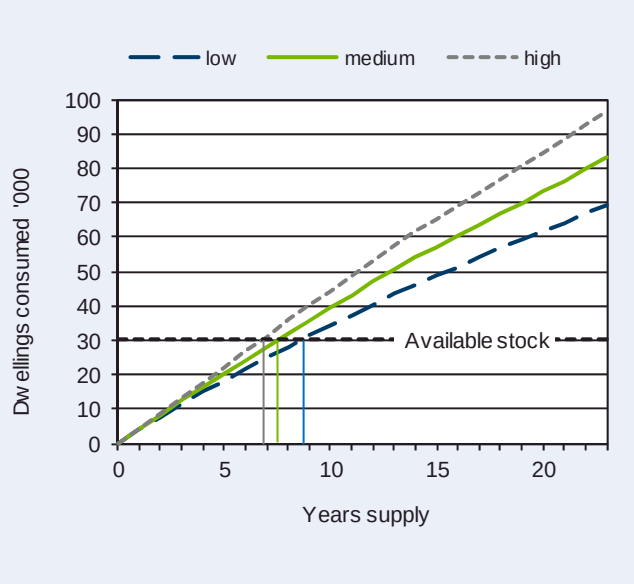
(a) Count of all persons enumerated in the dwelling on census night, including visitors from within Australia. Excludes usual residents who were temporarily absent on census night.

Total potential dwelling yield

Land ownership and fragmentation of land are potential constraints to residential development, and adjustments have been made to the broadhectare stock by applying potential development rates to land parcels. Furthermore, to determine overall residential land supply for this study, existing vacant residential land stock below 2,500 square metres has been added to the broadhectare supply. Residential land supply based on these components indicates a total potential dwelling yield of approximately 30,250 dwellings (See Table 5).

It is important to note that this dwelling yield does not include dwellings that would have been achieved through infill and redevelopment of smaller parcels below the broadhectare model threshold.

Figure 1 Moreton Bay projected demand for land stock based on dwelling projections



Years' supply — illustrative only

Evidently, not all future dwelling demand will be met through development of broadhectare land. Nevertheless, an indicator of the adequacy of the supply of residential land (broadhectare and vacant lots) can be calculated by comparing the total supply indicated above with future demand.

To make an assessment of future demand and determine whether there is an adequate supply of residential land, three scenarios of dwelling projections have been used based on the Queensland Government's population projection series — low, medium and high. Figure 1 and Table 5 show, based on these scenarios, the amount of land supply in terms of years remaining.

Table 5 also shows that developed land parcels that are vacant account for 10 per cent of the total residential land stock yield.

Table 5 Moreton Bay broadhectare supply scenarios

Dwelling production scenario [a]	Demand for residential lots: Dwellings required to 2036 [b]	Supply - Stock of residential lots: Broadhectare dwelling yield [c]	Existing vacant land parcels [d]	Total potential dwellings [e]	Years supply [f]
Low trend	69,241	27,183	3,070	30,253	9
Medium trend	83,055	27,183	3,070	30,253	8
High trend	96,549	27,183	3,070	30,253	7

(a) Based on dwelling projection levels produced in 2013.
(b) Dwellings required to 2036 based on Government Statistician dwelling projections.
(c) Adjusted to take into account the propensity of development.
(d) Estimate of vacant residential parcels at September 2013.
(e) Supply of residential lots.
(f) Illustrative only, if no development occurs outside of broadhectare land.

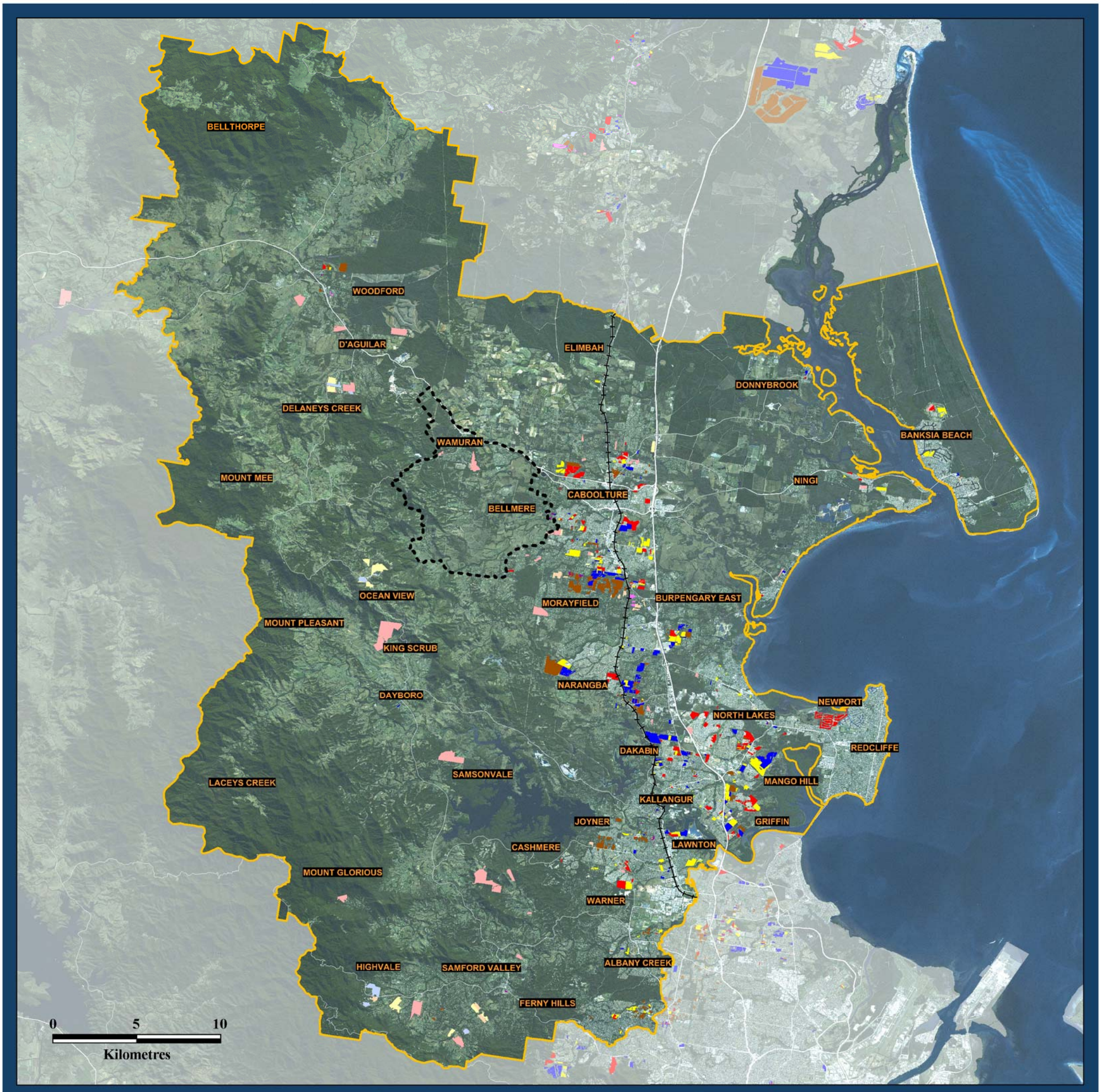
Conclusion — Moreton Bay Regional Council

The study has estimated that the total area of broadhectare land available for residential development is approximately 3,526 hectares. If this land were fully developed it has the potential to yield approximately 27,200 dwellings and accommodate 65,000 people, using current average household sizes.

Based on current medium series dwelling projections and the expected broadhectare dwelling yield, the available residential land stock indicates approximately 8 years of supply. The Caboolture West MPA, which is an identified growth area, may accommodate significant growth in the Moreton Bay region in the long-term with the potential to yield a further 19,000 dwellings to 2041.

Government Statistician

Broadhectare study 2013 - Moreton Bay Regional Council



Legend

Broadhectare land

Timeframe	Urban residential	Rural residential
0 – 2 years	609ha	787ha
2 – 5 years	587ha	204ha
5 – 10 years	544ha	111ha
10+ years	563ha	83ha
Not specified	21ha	16ha

Land suitable and potentially available for residential development. Timeframes are indicative only.

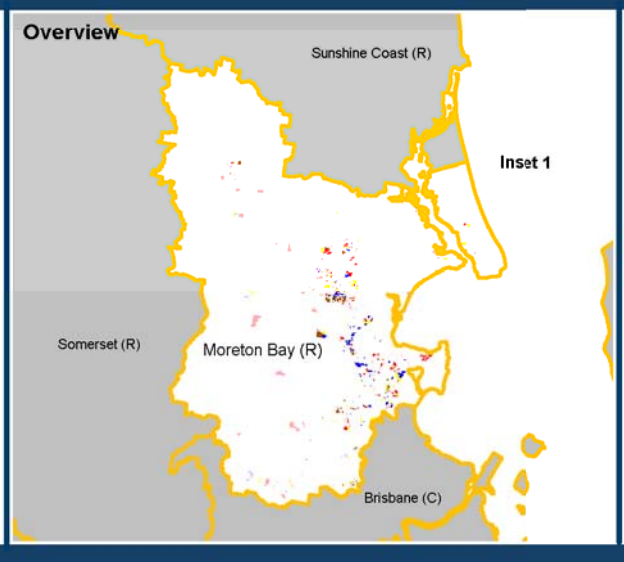
Other map features

Local government boundaries

Caboolture West Master Planned Area

Major roads

N



Notes

This map indicates the areas which are suitable and potentially available for residential development. This map does not commit council to approve developments within these identified areas or within the indicated timeframes.
This map forms part of the Broadhectare Study and is to be read in conjunction with the main text of the profile.

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This edition of the Broadhectare Study was based on the Digital Cadastral Database, September 2013.

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