

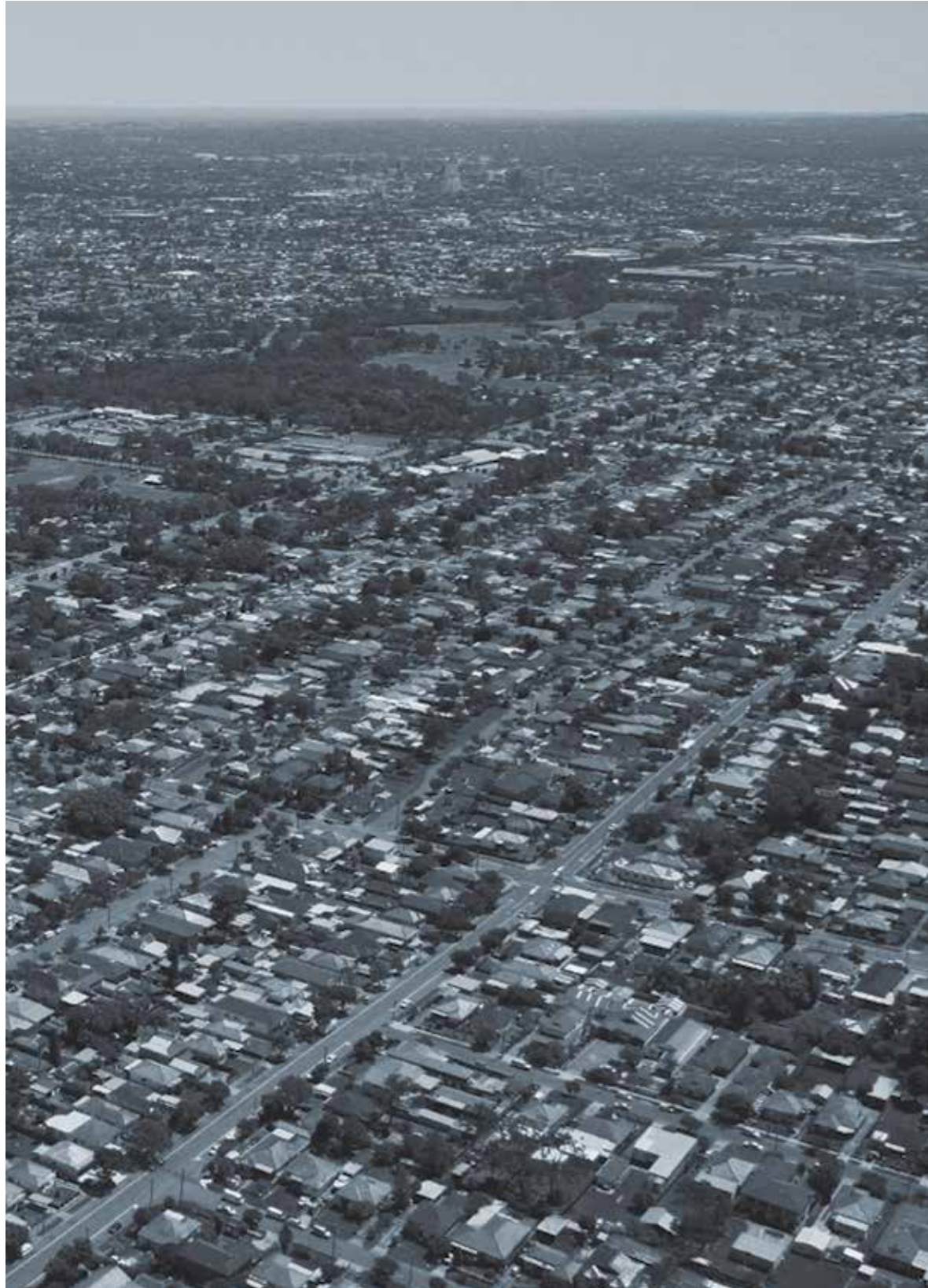
SEPTEMBER QUARTERLY MONITOR

Planning &
Infrastructure

MDP

2012

Metropolitan Development Program



CONTENTS

1	SUMMARY	1
2	SYDNEY REGION RESIDENTIAL ACTIVITY	5
	• APPROVALS AND COMPLETIONS	6
	• BUILDING TYPE	7
	• DEVELOPMENT SIZE	8
3	GREENFIELD DEVELOPMENT PIPELINE	9
	MONITORING STEPS	10
	• STEP 1 – RELEASED	11
	• STEP 2 – REZONED	11
	• STEP 3 – REZONED WITH TRUNK INFRASTRUCTURE	11
	• STEP 4 – REZONED WITH LEAD IN INFRASTRUCTURE	11
	• STEP 5 – SUBDIVISION APPROVAL	13
	• STEP 6 – LOT PRODUCTION	14
	• STEP 7 – VACANT LOT STOCK	15
	• STEP 8 – DWELLING APPROVAL	16
	• STEP 9 – DWELLINGS UNDER CONSTRUCTION	17
	• STEP 10 – DWELLING PRODUCTION/COMPLETION	18
	• STEPS 5 - 10 SUMMARY	19
	• LOT SIZE	20
4	EXISTING URBAN AREAS – GROWTH LOCATIONS	21
	GLOSSARY AND DATA SOURCES	23



KEY POINTS

- Total released greenfield stock is land for 152,417 potential dwellings or 24 years supply.
- Rezoned greenfield stock is land for 87,262 potential dwellings or 13.7 years supply.
- In the September quarter Sydney Region dwelling approvals fell slightly to 6,266, but net dwelling completions increased substantially to 5,687.
- Greenfield dwelling completions made up 31 per cent of the Sydney Region total for the quarter.

1. SUMMARY

The quarterly MDP monitor provides information on residential activity and greenfield land supply in the Sydney Region including the Central Coast.

Section 2 provides Sydney Region LGA dwelling approval, net dwelling completions and building type as well as size of completed developments.

Section 3 reports on the greenfield development pipeline covering the 10 steps from release of fringe land for urban purposes, through rezoning and servicing, approvals and construction to the completion of a dwelling.

In Section 4 dwelling completion data is provided for the key residential growth locations in the existing urban areas.

The quarterly monitoring report complements the annual MDP reports which include further information on residential activity, greenfield land supply and dwelling potential in the existing urban areas. Detailed maps are provided in the annual reports.

The monthly MDP monitors provide a snapshot of Sydney Region dwelling approvals and net dwelling completions.

SYDNEY REGION RESIDENTIAL ACTIVITY

- Dwelling approvals in the September quarter fell slightly to 6,266 from 6,667 in the previous quarter.
- Quarterly net dwelling completions continued to increase. In the September quarter completions were 5,687 which is a 36 per cent increase from the June quarter.
- 39 per cent of dwelling approvals were for detached houses and 38 per cent were for dwellings in multi-unit developments 4+storeys.
- Greenfield dwelling approvals were 21 per cent of the Sydney Region quarterly total whereas greenfield net dwelling completions made up 31 per cent of the total.
- The highest proportion of net dwelling completions were detached houses (43 per cent) followed by developments 100 + dwellings in size (21 per cent), developments 11- 50 dwellings in size (16 per cent) and developments 51-100 dwellings in size (11 per cent).

GREENFIELD DEVELOPMENT PIPELINE

- 10 MONITORING STEPS

STEPS 1- 4: RELEASE, REZONING AND MAJOR SERVICING

- Total MDP stock released by State Government is land for 152,417 potential dwellings. Based upon historic consumption this is equal to 24 years of supply. The potential is located in 80 release areas.
- Of the total stock, land for 87,262 potential dwellings has been rezoned. This is equal to 13.7 years supply.

- Dwelling potential of release areas rezoned with trunk infrastructure is 70,804 potential dwellings and rezoned with lead in infrastructure 40,445 (see Figure 3.3 for infrastructure definitions).

STEPS 5 – 6: LOT AND DWELLING APPROVALS AND PRODUCTION

- In the September quarter there was a fall in lot approvals and production from the previous quarter but an increase in dwelling approvals and completions.
- Subdivision approvals in the September quarter were 1,091 lots which was a fall from 1,546 in the June quarter. Lot production also fell from 1,699 to 1,168.
- Dwelling approvals increased slightly to 1,299 and dwelling production more substantially from 911 to 1,750.
- The release areas with the highest overall level of activity in the quarter were in Blacktown LGA, especially Ropes Crossing, Second Ponds Creek and Bungaribee. Other significant release area activity included Oran Park and Turner Road in Camden LGA, Balmoral Road and North Kellyville in The Hills LGA, Jordan Springs in Penrith LGA and Edmondson Park and South Hoxton Park in Liverpool LGA.

GROWTH LOCATIONS – EXISTING URBAN AREAS

- In the quarter the highest level of production occurred in Green Square (647 dwellings), Wentworth Point (301), Rhodes Peninsula (195), Breakfast Point (138), Bonar Street (94), Wollie Creek (77), St Leonards Town Centre (77) and Telopea Urban Renewal Precinct (75).

Table 1.1: September 2012 Quarter Summary

	Activity/ Stock	6 Months Jan - Jun 2007	6 Months Jul - Dec 2007	6 Months Jan - Jun 2008	6 Months Jul - Dec 2008	6 Months Jan - Jun 2009	6 Months Jul - Dec 2009	6 Months Jan - Jun 2010	6 Months Jul - Dec 2010	6 Months Jan - Jun 2011	6 Months Jul - Dec 2011	3 Months Jan - Mar 2012	3 Months Apr - Jun 2012	3 Months Jul - Sep 2012
Sydney Region Residential Activity														
Sydney Region Dwelling Approvals	Activity	8,036	9,702	8,521	7,675	5,808	9,742	9,781	11,122	9,535	12,037	5,023	6,667	6,266
Sydney Region Net Dwelling Completions	Activity	6,174	7,616	6,996	7,271	6,313	7,439	6,469	8,183	7,134	8,334	3,081	4,176	5,687
Greenfield Development Pipeline														
1. Total MDP Released	Stock	108,180	108,565	106,521	105,115	134,854	133,374	132,134	133,743	146,166	155,566	155,054	154,167	152,417
2. Rezoned	Stock	50,063	61,818	61,224	69,603	72,388	72,153	86,949	85,913	85,511	86,299	85,599	89,012	87,262
3. Rezoned with Trunk Infrastructure	Stock	NA	NA	50,797	57,389	59,146	57,666	73,744	70,955	72,452	70,852	70,340	72,554	70,804
4. Rezoned with Lead in Infrastructure	Stock	33,899	32,854	30,167	29,177	35,578	34,098	43,844	33,967	41,986	40,386	39,874	42,195	40,445
5. Subdivision Approval	Activity	NA	NA	NA	NA	NA	NA	NA	NA	NA	2,800	634	1,546	1,091
6. Lot Production	Activity	890	1,170	1,111	791	1,279	1,043	1,431	1,319	2,369	1,324	1,083	1,699	1,168
7. Vacant Stock	Stock	2,765	2,818	2,760	2,749	3,059	2,458	2,512	2,403	2,487	3,020	3,210	3,418	3,737
8. Dwelling Approval	Activity	NA	NA	NA	NA	NA	NA	NA	NA	NA	1,682	808	1,239	1,299
9. Dwellings under Construction	Stock	1,701	1,532	1,706	1,685	1,548	2,079	1,837	1,613	1,526	1,703	1,653	3,126	2,174
10. Dwelling Production	Activity	1,045	1,013	1,061	1,406	948	1,335	1,534	1,613	1,781	1,653	514	911	1,750
Greenfield new Lot size (sqm)		580	523	533	517	524	535	516	508	508	513	529	495	464

Note: Stock - is a snapshot of the stock levels at the end of the monitoring period. Activity - is the approval and production activity over the monitoring period.



2. SYDNEY REGION RESIDENTIAL ACTIVITY

2. SYDNEY REGION RESIDENTIAL ACTIVITY

Residential activity includes LGA dwelling approval and completions (Table 2.1), building type (Table 2.2) and development size (Table 2.3).

DWELLING APPROVALS

In the September quarter 6,266 dwellings were approved, which is a slight fall on the previous quarter.

The quarterly and monthly monitors may report slightly different ABS approval data. The monthly monitor includes conversions and dwelling units approved as part of the alterations and additions or the construction of non-residential buildings whereas the quarterly monitor does not.

The LGAs with the highest level of dwelling approvals in the quarter are shown in the table below. The top 10 LGAs provide 60 per cent of dwelling approvals.

DETAILS OF THE TOP FIVE LGAs IN THE QUARTER ARE:

- **BLACKTOWN (576 DWELLINGS – 9 PER CENT)** – 378 dwellings approved were detached dwellings and 119 medium density
- **SYDNEY CITY (563 DWELLINGS – 9 PER CENT)** – 541 dwellings approved were 4+storeys
- **PARRAMATTA (478 DWELLINGS – 8 PER CENT)** – 379 dwellings approved were 4+storeys
- **BOTANY BAY (423 DWELLINGS – 7 PER CENT)** – 347 dwellings approved were 1-3 storeys
- **AUBURN (326 DWELLINGS – 5 PER CENT)** – 263 dwellings approved were 4+storeys

Sydney Region September Quarter 2012 Dwelling Approvals - Top Ten LGAs

LGA	Dwelling	%
Blacktown	576	9%
Sydney City	563	9%
Parramatta	478	8%
Botany Bay	423	7%
Auburn	326	5%
Liverpool	322	5%
Canada Bay	320	5%
Camden	257	4%
Penrith	255	4%
Marrickville	236	4%
Other LGAs	3,756	40%
Sydney Region Total	6,266	100%

NET DWELLING PRODUCTION

5,687 net dwellings were completed in the September quarter. The LGAs with the highest level of production in the quarter are shown in the table below. The top ten LGAs produced 64 per cent of the dwelling completions in the region.

DETAILS OF THE TOP FIVE LGAs IN THE QUARTER ARE:

- **SYDNEY CITY (708 DWELLINGS) – 602 DWELLINGS WERE IN THREE DEVELOPMENTS:**
 - 20 Gadigal Ave, Zetland (Victoria Park): 291 units
 - 5 O’Dea Ave, Zetland (Victoria Park): 158 units
 - Defries Ave, Zetland (Victoria Park): 153 units
- **BLACKTOWN (582 DWELLINGS) – 473 DWELLINGS IN GREENFIELD RELEASE AREAS INCLUDING:**
 - Second Ponds Creek - 260 dwellings
 - St Marys ADI (Ropes Crossing) - 97 dwellings
 - Castlebrook - 54 dwellings
 - Bungarribee - 29 dwellings
- **PENRITH (375 DWELLINGS) – 289 DWELLINGS IN GREENFIELD RELEASE AREAS INCLUDING:**
 - Waterside - 85 dwellings
 - Glenmore Park Expansion Area - 86 dwellings
 - St Marys ADI (Jordan Springs) - 82 dwellings
 - Claremont Meadows Stage 2 – 31 dwellings
- **CANADA BAY (338 DWELLINGS) – 333 DWELLINGS WERE IN THREE DEVELOPMENTS:**
 - 2 Peninsula Drive, Breakfast Point – 50 dwellings
 - Vineyard Way, Breakfast Point - 88 dwellings
 - Walker Street, Rhodes - 195 dwellings
- **THE HILLS (328 DWELLINGS):**
 - 17 Crane Road, Castle Hills – 68 units
 - 171 dwellings in greenfield release areas including:
 - Balmoral Road – 62 dwellings
 - Kellyville – 37 dwellings
 - Rouse Hill Regional Centre – 29 dwellings

Sydney Region September Quarter 2012 Net Dwelling Completions - Top Ten LGAs

LGA	Dwelling	%
Sydney City	708	12%
Blacktown	582	10%
Penrith	375	7%
Canada Bay	338	6%
The Hills	328	6%
Camden	325	6%
Liverpool	323	6%
Auburn	311	5%
Parramatta	293	5%
Rockdale	179	3%
Other LGA	1,925	34%
Sydney Region Total	5,687	100%

SYDNEY REGION RESIDENTIAL ACTIVITY - APPROVALS AND COMPLETIONS

Table 2.1: Sydney Region Residential Activity - Dwelling Approvals and Net Dwelling Completions (Jul-Dec 2011 to Jul-Sep 2012)

Subregion	LGA	Dwelling Approvals				Net Dwelling Completions			
		Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
Sydney City	Sydney	646	788	893	563	543	165	435	708
Sydney City Total		646	788	893	563	543	165	435	708
East	Botany Bay	712	149	169	423	29	5	7	7
	Randwick	143	63	60	89	367	181	121	103
	Waverley	57	17	24	11	175	25	12	13
	Woollahra	91	84	71	95	4	7	2	4
East Total		1,003	313	324	618	575	218	142	127
South	Canterbury	126	149	149	59	43	80	28	31
	Hurstville	167	36	318	31	39	31	14	78
	Kogarah	51	49	83	113	98	39	113	30
	Marrickville	213	59	43	236	61	32	110	29
	Rockdale	150	73	180	42	441	48	30	179
	Sutherland	215	68	72	93	234	43	36	107
South Total		922	434	845	574	916	273	331	454
Inner West	Ashfield	12	82	126	1	45	1	0	4
	Burwood	92	70	195	8	241	2	8	0
	Canada Bay	627	18	278	320	412	265	103	338
	Leichhardt	2	0	0	3	45	6	2	15
	Strathfield	495	11	4	1	0	1	0	50
Inner West Total		1,228	181	603	333	743	275	113	407
Inner North	Hunters Hill	31	2	47	20	1	1	0	2
	Lane Cove	18	270	12	187	60	2	1	3
	Mosman	11	2	2	97	7	1	8	0
	North Sydney	265	49	25	30	95	17	0	126
	Ryde	235	370	397	81	56	54	201	86
	Willoughby	368	18	37	6	44	20	2	18
Inner North Total		928	711	520	421	263	95	212	235
North	Hornsby	126	81	133	177	56	47	46	40
	Ku-ring-gai	142	99	107	82	348	85	303	161
North Total		268	180	240	259	404	132	349	201
North East	Manly	24	7	47	5	45	23	7	82
	Pittwater	47	38	11	64	55	39	109	153
	Warringah	412	54	51	104	212	84	38	47
North East Total		483	99	109	173	312	146	154	282
Central West	Auburn	754	79	548	326	460	271	66	311
	Bankstown	408	159	304	187	185	173	178	105
	Fairfield	229	68	222	194	160	79	118	70
	Holroyd	399	210	104	100	204	54	241	129
	Parramatta	437	467	270	478	491	252	343	293
Central West Total		2,227	983	1,448	1,285	1,500	829	946	908
North West	Blacktown	766	375	274	576	739	274	379	582
	Blue Mountains	80	30	34	28	44	42	25	62
	Hawkesbury	83	39	36	26	41	25	27	44
	Penrith	489	158	199	255	332	109	245	375
	The Hills	1,324	143	114	176	282	112	224	328
North West Total		2,742	745	657	1,061	1,438	562	900	1,391
South West	Camden	410	185	312	257	399	106	167	325
	Campbelltown	242	143	102	151	412	59	116	142
	Liverpool	494	165	380	322	354	116	173	323
	Wollondilly	124	146	47	50	117	41	73	56
South West Total		1,270	639	841	780	1,282	322	529	846
Central Coast	Gosford	132	65	81	84	170	1	1	27
	Wyong	188	65	106	115	188	63	64	101
Central Coast Total		320	130	187	199	358	64	65	128
Sydney Region Total		12,037	5,203	6,667	6,266	8,334	3,081	4,176	5,687

SYDNEY REGION RESIDENTIAL ACTIVITY - BUILDING TYPE

Table 2.2: Sydney Region Residential Activity - Dwelling Approvals and Net Dwelling Completions by Building Type (July - September 2012)

Subregion	LGA	Dwelling Approvals (by building type) Jul-Sep 2012						Net Dwelling Completions (by building type) Jul-Sep 2012		
		Detached House	Medium Density	1-3 Storeys	4+ Storeys	Alterations & Conversions	% Multi-unit	Detached House	Multi-unit	% Multi-unit
Sydney City	Sydney	5	10	2	541	5	98%	0	708	100%
Sydney City Total		5	10	2	541	5	98%	0	708	100%
East	Botany Bay	13	8	347	53	2	96%	7	0	0%
	Randwick	15	4	10	58	2	81%	10	93	90%
	Waverley	8	0	0	3	0	27%	2	11	85%
	Woollahra	66	5	5	17	2	28%	0	4	100%
East Total		102	17	362	131	6	83%	19	108	85%
South	Canterbury	27	20	6	0	6	44%	13	18	58%
	Hurstville	14	17	0	0	0	55%	11	67	86%
	Kogarah	16	6	74	17	0	86%	1	29	97%
	Marrickville	7	12	2	206	9	93%	11	18	62%
	Rockdale	21	2	12	0	7	33%	2	177	99%
South Total		149	85	94	223	23	70%	88	366	81%
Inner West	Ashfield	1	0	0	0	0	0%	4	0	0%
	Burwood	3	5	0	0	0	63%	0	0	0%
	Canada Bay	5	0	0	315	0	98%	2	336	99%
	Leichhardt	3	0	0	0	0	0%	3	12	80%
	Strathfield	1	0	0	0	0	0%	1	49	98%
Inner West Total		13	5	0	315	0	96%	10	397	98%
Inner North	Hunters Hill	1	0	0	19	0	95%	1	1	50%
	Lane Cove	14	0	0	173	0	93%	2	1	33%
	Mosman	7	0	0	90	0	93%	0	0	0%
	North Sydney	26	0	0	0	4	0%	2	124	98%
	Ryde	23	17	0	41	0	72%	36	50	58%
Inner North Total		74	20	0	323	4	81%	53	182	77%
North	Hornsby	55	18	0	102	2	68%	39	1	3%
	Ku-ring-gai	28	2	0	51	1	65%	19	142	88%
North Total		83	20	0	153	3	67%	58	143	71%
North East	Manly	5	0	0	0	0	0%	2	80	98%
	Pittwater	19	8	36	0	1	69%	19	134	88%
	Warringah	47	0	56	0	1	54%	12	35	74%
North East Total		71	8	92	0	2	58%	33	249	88%
Central West	Auburn	44	16	0	263	3	86%	8	303	97%
	Bankstown	75	110	0	0	2	59%	54	51	49%
	Fairfield	173	9	3	0	9	6%	49	21	30%
	Holroyd	55	39	0	0	6	39%	102	27	21%
	Parramatta	41	49	8	379	1	91%	69	224	76%
Central West Total		388	223	11	642	21	68%	282	626	69%
North West	Blacktown	378	119	76	0	3	34%	498	84	14%
	Blue Mountains	25	0	2	0	1	7%	51	11	18%
	Hawkesbury	19	6	0	0	1	23%	44	0	0%
	Penrith	175	34	44	0	2	31%	300	75	20%
	The Hills	148	10	2	15	1	15%	178	150	46%
North West Total		745	169	124	15	8	29%	1,071	320	23%
South West	Camden	253	0	4	0	0	2%	325	0	0%
	Campbelltown	123	26	0	0	2	17%	131	11	8%
	Liverpool	264	12	0	40	6	16%	260	63	20%
	Wollondilly	48	0	0	0	2	0%	44	12	21%
South West Total		688	38	4	40	10	11%	760	86	10%
Central Coast	Gosford	69	5	6	0	4	13%	14	13	48%
	Wyong	80	9	24	0	2	29%	68	33	33%
Central Coast Total		149	14	30	0	6	22%	82	46	36%
Sydney Region Total		2,467	609	719	2,383	88	59%	2,456	3,231	57%

SYDNEY REGION RESIDENTIAL ACTIVITY - DEVELOPMENT SIZE

Table 2.3: Sydney Region Dwelling Completions by Size of Development (Jul-Sep 2012)

Subregion	LGA	Dwelling Production (by size of development) Jul-Sep 2012						Total
		Detached	Multi Unit					
			1	2-10	11-50	51-100	100+	
Sydney City	Sydney	0	2	9	95	0	602	708
Sydney City Total		0	2	9	95	0	602	708
East	Botany Bay	7	0	0	0	0	0	7
	Randwick	10	8	5	25	55	0	103
	Waverley	2	1	10	0	0	0	13
	Woollahra	0	0	4	0	0	0	4
East Total		19	9	19	25	55	0	127
South	Canterbury	13	3	15	0	0	0	31
	Hurstville	11	1	6	60	0	0	78
	Kogarah	1	1	0	28	0	0	30
	Marrickville	11	1	17	0	0	0	29
	Rockdale	2	3	3	0	171	0	179
South Total		50	6	16	35	0	0	107
South Total		88	15	57	123	171	0	454
Inner West	Ashfield	4	0	0	0	0	0	4
	Burwood	0	0	0	0	0	0	0
	Canada Bay	2	3	0	50	88	195	338
	Leichhardt	3	2	10	0	0	0	15
	Strathfield	1	1	10	38	0	0	50
Inner West Total		10	6	20	88	88	195	407
Inner North	Hunters Hill	1	1	0	0	0	0	2
	Lane Cove	2	1	0	0	0	0	3
	Mosman	0	0	0	0	0	0	0
	North Sydney	2	0	0	47	77	0	126
	Ryde	36	5	17	28	0	0	86
Inner North Total		12	1	5	0	0	0	18
Inner North Total		53	8	22	75	77	0	235
North	Hornsby	39	1	0	0	0	0	40
	Ku-ring-gai	19	3	13	71	55	0	161
North Total		58	4	13	71	55	0	201
North East	Manly	2	0	0	20	60	0	82
	Pittwater	19	2	0	12	0	120	153
	Warringah	12	2	11	22	0	0	47
North East Total		33	4	11	54	60	120	282
Central West	Auburn	8	2	0	0	0	301	311
	Bankstown	55	5	18	27	0	0	105
	Fairfield	49	10	11	0	0	0	70
	Holroyd	102	1	8	18	0	0	129
Central West Total		69	10	29	125	60	0	293
Central West Total		283	28	66	170	60	301	908
North West	Blacktown	498	15	47	22	0	0	582
	Blue Mountains	51	0	11	0	0	0	62
	Hawkesbury	44	0	0	0	0	0	44
	Penrith	300	9	32	34	0	0	375
North West Total		178	2	17	63	68	0	328
North West Total		1,071	26	107	119	68	0	1,391
South West	Camden	325	0	0	0	0	0	325
	Campbelltown	131	2	9	0	0	0	142
	Liverpool	260	1	8	54	0	0	323
	Wollondilly	44	0	12	0	0	0	56
South West Total		760	3	29	54	0	0	846
Central Coast	Gosford	14	7	6	0	0	0	27
	Wyong	68	0	12	21	0	0	101
Central Coast Total		82	7	18	21	0	0	128
Sydney Region Total		2,457	112	371	895	634	1,218	5,687

3. GREENFIELD DEVELOPMENT PIPELINE



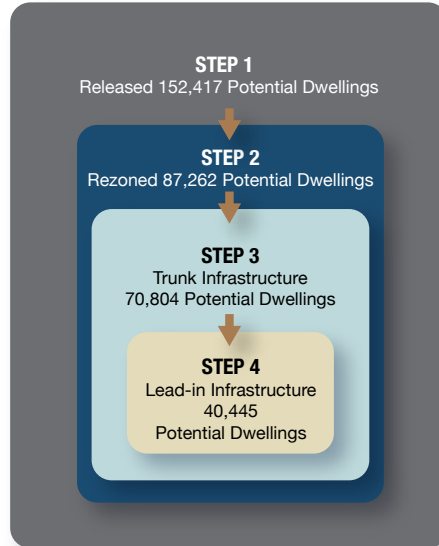
THE GREENFIELD DEVELOPMENT PIPELINE

Greenfield land is located on the fringes of the metropolitan area. The MDP monitors the development of greenfield land from release by the State Government for urban purposes, through rezoning and servicing, approvals and lot construction to the completion of a dwelling.

The greenfield development pipeline is measured in ten steps. The first four steps relate to the early stages of the pipeline – release of land, rezoning and major servicing. These steps are a subset of each other as shown in Figure 3.1. The next six steps measure the more detailed approval and construction of lots and dwellings. The 10 steps are shown in Figure 3.2. The infrastructure Steps 3 and 4 are explained in Figure 3.3.

Tables 3.1 to 3.4 provide data on Steps 1 to 4 at the LGA level. Details of stock levels by release areas in each of these four steps are provided in the annual MDP reports. Tables 3.5 to 3.10 provide data on the Steps 5 to 10 for each release area that is rezoned with lead in infrastructure.

Figure 3.1: Release, Rezoning and Servicing Steps



MONITORING STEPS

RELEASE, REZONING AND MAJOR SERVICING

THE FIRST FOUR STEPS ARE A SUBSET OF EACH OTHER AND MEASURE STOCK LEVELS AT THE END OF THE MONITORING PERIOD.

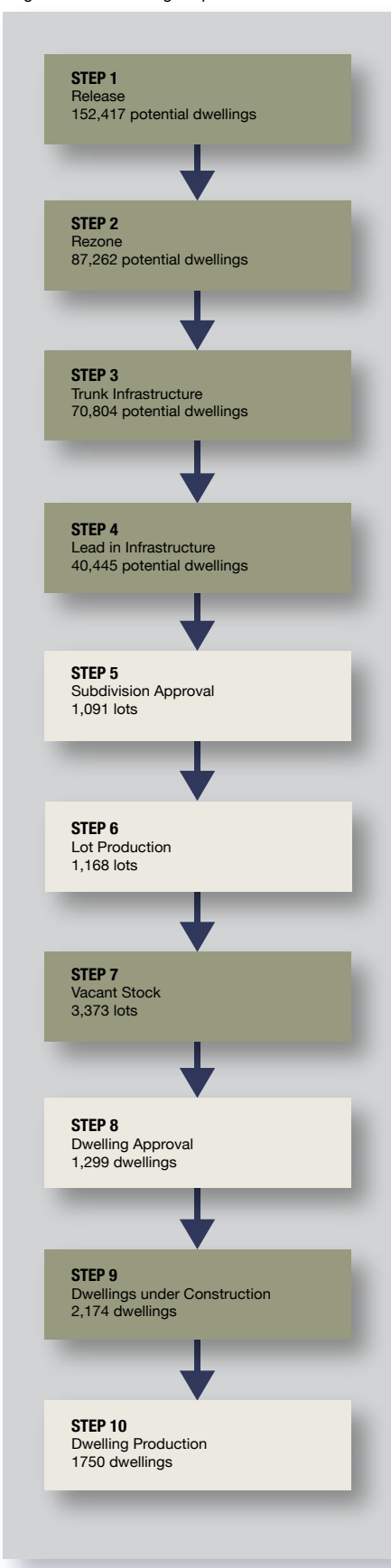
- **STEP 1 RELEASED (STOCK)** – fringe land that has been released by State Government for urban purposes. Current stock is land for 152,417 potential dwellings. The benchmark is 112,500 potential dwellings.
- **STEP 2 REZONED (STOCK)** – release areas that have been rezoned. Current rezoned stock is land for 87,262 potential dwellings or 57 per cent of total MDP stock. The benchmark is 60,000 potential dwellings.
- **STEP 3 SERVICED WITH TRUNK INFRASTRUCTURE (STOCK)** – rezoned release areas where there is servicing capacity in the water and wastewater trunk infrastructure (see Figure 3.3). Current stock includes land for 70,804 potential dwellings or 46 per cent of total stock. The NSW 2021 target is 50,000 potential dwellings.
- **STEP 4 SERVICED WITH LEAD IN INFRASTRUCTURE (STOCK)** – rezoned release areas that have water and wastewater infrastructure constructed to the edge of a release area to link the development with the trunk infrastructure (see Figure 3.3). Current stock is land for 40,445 potential dwellings or 26 per cent of total stock.

LOT AND DWELLING APPROVAL AND PRODUCTION

STEPS 5 TO 10 MONITOR RELEASE AREAS THAT ARE GENERALLY IN STEP 4 - REZONED WITH LEAD IN INFRASTRUCTURE. THE STEPS ARE A MIXTURE OF ACTIVITY (THE NUMBER OF LOTS OR DWELLINGS THAT HAVE BEEN APPROVED OR CONSTRUCTED IN A PERIOD) AND STOCK.

- **STEP 5 SUBDIVISION APPROVAL (ACTIVITY)** – 1,091 lots were approved in the quarter with the highest numbers in Ropes Crossing (367) followed by Balmoral Road (172), North Kellyville (141) and Edmondson Park (105).
- **STEP 6 LOT PRODUCTION (ACTIVITY)** – 1,168 lots were constructed in the quarter with the highest production in Jordan Springs (308) followed by Turner Road (160), Oran Park (159), South Hoxton Park (128) and Bungarribee (110).
- **STEP 7 VACANT LOTS (STOCK)** – number of lots at the end of the monitoring period that have been subdivided and serviced but do not have dwellings built or under construction. The vacant stock at the end of the period was 3,373 lots. The release areas with the highest stock levels are in the active stages of production such as Seconds Ponds Creek (319), Jordan Springs (276), South Hoxton Park (191), Glenmore Park Expansion (221) and Aerodrome (174).
- **STEP 8 DWELLING APPROVAL (ACTIVITY)** – 1,299 dwellings were approved in the quarter with the highest level in Balmoral Road (150), followed by Seconds Ponds Creek (124), South Hoxton Park (95) and Turner Road (86).
- **STEP 9 DWELLINGS UNDER CONSTRUCTION (STOCK)** – at the end of the monitoring period there were 2,174 dwellings under construction. Seconds Ponds Creek had the highest number (301) followed by Balmoral Road (133), Turner Road (114) and Jordan Springs (93).
- **STEP 10 DWELLING PRODUCTION (ACTIVITY)** – net dwellings produced in the quarter were 1,750 with the highest production in Seconds Ponds Creek (260), Warriewood Valley (138), Oran Park (106) and Ropes Crossing (97).

Figure 3.2: Monitoring Steps



STEP 1. RELEASE AND INCLUSION ON MDP

The NSW Government makes the decision to release land for urban purposes and to place it on the MDP. In many cases the decision to release land follows regional structure planning. The release step is a prerequisite to rezoning.

Table 3.1: Released - Total MDP Stock (Jan 2012 - Oct 2012)

LGA	Jan 2012	Apr 2012	Jul 2012	Oct 2012
Blacktown	38,070	37,894	36,521	36,048
Camden	32,161	32,060	23,599	23,286
Campbelltown	10,217	10,210	10,305	10,231
Hawkesbury	600	600	600	600
Liverpool	25,654	25,605	34,101	33,887
Penrith	12,735	12,673	12,676	12,387
Pittwater	5,687	5,683	5,834	5,695
The Hills	23,454	23,392	23,545	23,374
Warringah	61	60	52	51
Wollondilly	93	79	66	54
Wyong	6,834	6,798	6,868	6,804
Total	155,566	155,054	154,167	152,417

STEP 2. REZONED

The detailed local planning and studies that lead to the rezoning of the release area for residential and other urban purposes.

Table 3.2: Rezoned (Jan 2012 - Oct 2012)

LGA	Jan 2012	Apr 2012	Jul 2012	Oct 2012
Blacktown	24,470	24,294	26,521	26,048
Camden	18,791	18,690	18,229	17,916
Campbelltown	2,997	2,990	3,085	3,011
Hawkesbury	0	0	0	0
Liverpool	11,244	11,195	11,691	11,477
Penrith	7,835	7,773	7,776	7,487
Pittwater	1,081	1,077	1,228	1,089
The Hills	13,445	13,383	13,536	13,365
Warringah	61	60	52	51
Wollondilly	93	79	66	54
Wyong	6,094	6,758	6,828	6,764
Total	86,299	85,599	89,012	87,262

STEP 3. REZONED WITH TRUNK INFRASTRUCTURE

Release areas that have been rezoned and are serviced with water and waste water trunk infrastructure i.e. the capacity of water and waste water trunk infrastructure to service a release area - water service reservoirs, pumping stations, sewage treatment plants and the existing larger pipes that feed that infrastructure (see Figure 3.3).

Table 3.3: Rezoned with Trunk Infrastructure (Jan 2011 - Oct 2012)

LGA	Jan 2012	Apr 2012	Jul 2012	Oct 2012
Blacktown	21,270	21,094	22,371	21,898
Camden	8,477	8,376	8,366	8,053
Campbelltown	2,997	2,990	3,085	3,011
Hawkesbury	0	0	0	0
Liverpool	11,244	11,195	11,691	11,477
Penrith	7,835	7,773	7,776	7,487
Pittwater	1,081	1,077	1,228	1,089
The Hills	13,400	13,338	13,491	13,320
Warringah	61	60	52	51
Wollondilly	93	79	66	54
Wyong	4,394	4,358	4,428	4,364
Total	70,852	70,340	72,554	70,804

STEP 4. REZONED WITH LEAD IN INFRASTRUCTURE

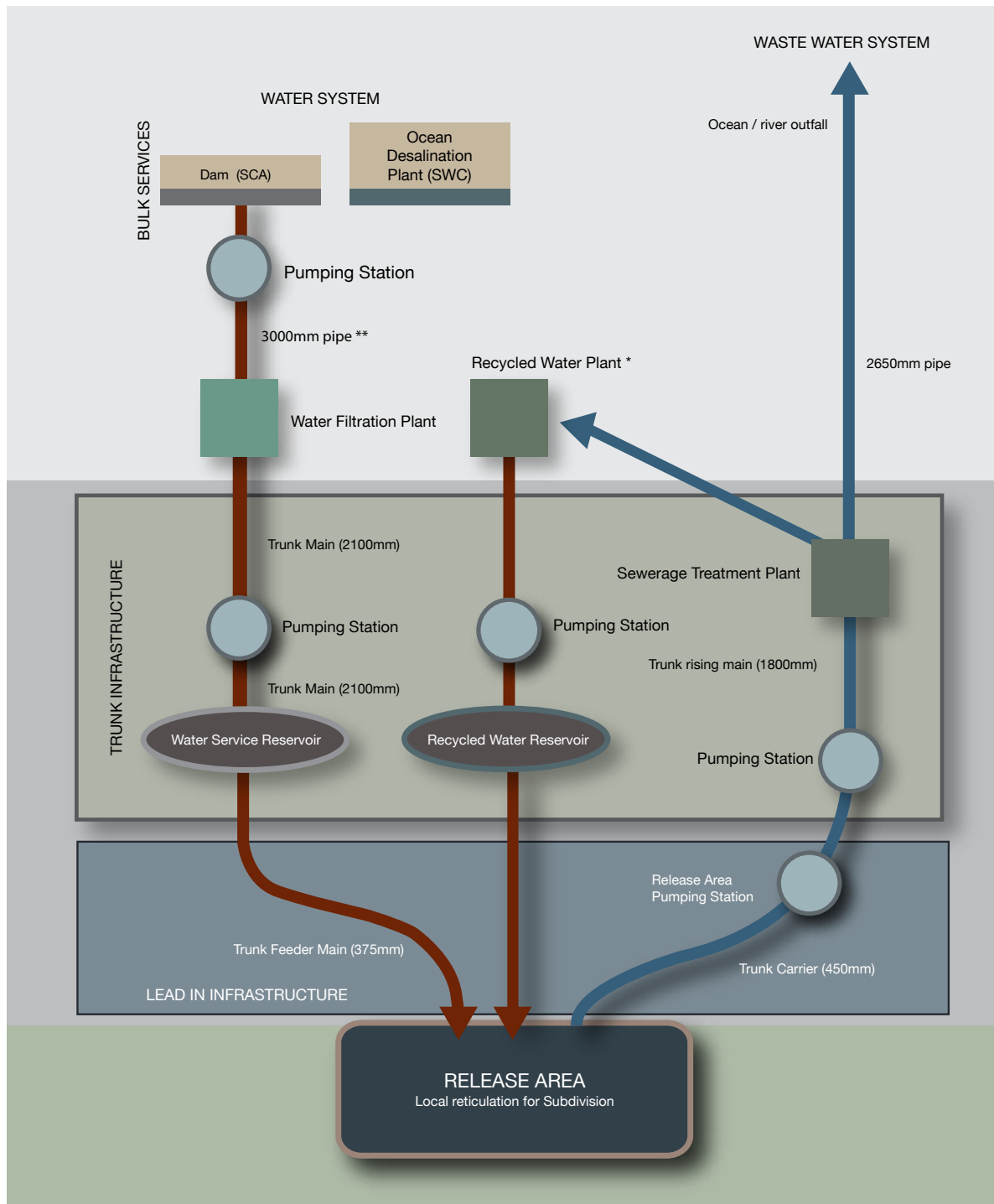
Release areas that have been rezoned and have water and wastewater infrastructure constructed to the edge of a release area to link the edge of the development with the available trunk infrastructure - trunk/feeder mains, release area pumping stations and trunk carriers (see Figure 3.3).

Table 3.4: Rezoned with Lead in Infrastructure (Jan 2012 - Oct 2012)

LGA	Jan 2012	Apr 2012	Jul 2012	Oct 2012
Blacktown	9,098	8,922	10,218	9,745
Camden	7,253	7,152	7,304	6,991
Campbelltown	1,287	1,280	1,375	1,301
Hawkesbury	0	0	0	0
Liverpool	4,318	4,269	4,273	4,059
Penrith	2,644	2,582	2,675	2,386
Pittwater	1,081	1,077	1,228	1,089
The Hills	10,844	10,782	11,263	11,092
Warringah	61	60	52	51
Wollondilly	93	79	66	54
Wyong	3,707	3,671	3,741	3,677
Total	40,386	39,874	42,195	40,445

Note: the October 2012 stock levels for Steps 1 to 4 may alter slightly following the completion of the 2012 Greenfield Audit. See annual MDP report for final stock figures.

Figure 3.3 WATER AND WASTE WATER INFRASTRUCTURE



* Reticulated recycled water schemes only in Growth Centres. ** Pipe sizes are indicative only.

STEP 5. SUBDIVISION APPROVAL

Approval of a development application for subdivision. In some cases an integrated development application may be approved for both subdivision and dwellings.

Table 3.5: Greenfield - Residential Subdivision Approval (Jul-Dec 2011 to Jul-Sep 2012)

LGA	Release Area	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
Blacktown	Alex Avenue (West)	0	2	300	0
	Area 20	0	0	0	0
	Bungarrabee	221	0	71	2
	Castlebrook	0	0	44	49
	Colebee	0	0	93	0
	Pipeworks	0	0	0	0
	Plumpton	0	0	2	4
	Riverstone	0	0	71	20
	Second Ponds Creek	18	31	37	56
	St Marys ADI (Ropes Crossing)	16	73	0	367
Sunnyholt	0	0	27	2	
Blacktown Total		255	106	645	500
Camden	Elderslie	59	0	53	24
	Harrington Park	20	4	0	0
	Harrington Park II	0	0	0	0
	Manooka Valley	0	0	0	0
	Mount Annan South	0	0	20	0
	Narellan	0	0	0	0
	Oran Park	2	0	14	0
	Spring Farm	285	0	100	35
Turner Road	0	0	24	0	
Camden Total		366	4	211	59
Campbelltown	Edmondson Park	229	0	38	57
	Glenfield Road	44	2	64	10
	Macquarie Links	0	0	0	0
	St Helens Park	0	0	0	0
	Other Release Area	0	0	0	0
Campbelltown Total		273	2	102	67
Hawkesbury	Bligh Park 2	0	0	0	0
Hawkesbury Total		0	0	0	0
Liverpool	Aerodrome	83	154	57	5
	Cabramatta Creek	30	58	0	0
	Carnes Hill	60	0	36	0
	Edmondson Park	62	5	86	105
	Hinchinbrook	0	0	0	6
	Leppington North	0	0	0	0
	Pleasure Point	0	0	0	0
	Prestons	8	0	2	3
South Hoxton Park	31	17	60	6	
Liverpool Total		274	234	241	125
Penrith	Caddens Road	346	0	125	0
	Claremont Meadows Stage 2	0	2	9	6
	Glenmore Park	0	0	0	0
	Glenmore Park Expansion Area	0	16	2	8
	St Marys ADI (Jordan Springs)	635	3	33	0
Waterside	39	35	50	0	
Penrith Total		1,020	56	219	14
Pittwater	Warriewood Valley	0	2	4	2
Other Release Area	0	0	0	0	
Pittwater Total		0	2	4	2
The Hills	Balmoral Road	305	96	4	172
	Barina Downs Road	0	0	0	0
	Kellyville	128	4	14	2
	Mungerie Park	0	0	0	0
	North Kellyville	160	125	106	141
	Norwest Business Park	10	0	0	0
Rouse Hill Regional Centre	9	0	0	2	
The Hills Total		612	225	124	317
Warringah	Belrose	0	0	0	0
Warringah Total		0	0	0	0
Wollondilly	Camden Park	0	0	0	0
Wollondilly Total		0	0	0	0
Wyong	Blue Haven	0	0	0	0
	Hamlyn Terrace	0	0	0	0
	Louisiana Road	0	0	0	0
	Mardi	0	0	0	0
	North Wyong	0	2	0	2
	Tumbi Valley	0	0	0	0
	Wadalba	0	3	0	5
Woongarra	0	0	0	0	
Wyong Total		0	5	0	7
Sydney Region Greenfield Total		2,800	634	1,546	1,091

STEP 6. LOT PRODUCTION

Lot production is the count over the monitoring period of new residential building lot registrations as included in NSW Land and Property cadastre in residential zones in greenfield release areas that have been rezoned with lead in infrastructure.

Table 3.6: Greenfield Lot Production (Jul-Dec 2011 to Jul-Sep 2012)

LGA	Release Area	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
Blacktown	Alex Avenue (West)	0	3	4	0
	Area 20	0	0	0	0
	Bungarrabee	0	0	113	110
	Castlebrook	30	3	15	0
	Colebee	6	14	101	0
	Pipeworks	0	0	0	0
	Plumpton	2	0	0	25
	Riverstone	0	0	0	0
	Second Ponds Creek	334	85	165	27
	St Marys ADI (Ropes Crossing)	57	30	186	14
	Sunnyholt	63	0	3	2
Blacktown Total		492	135	587	178
Camden	Elderslie	31	6	4	0
	Harrington Park	0	0	10	18
	Harrington Park II	0	90	0	16
	Manooka Valley	0	0	0	0
	Mount Annan South	3	54	43	0
	Narellan	0	0	0	2
	Oran Park	91	0	45	159
	Spring Farm	21	44	146	0
	Turner Road	86	186	9	160
Camden Total		232	380	257	355
Campbelltown	Edmondson Park	50	8	8	0
	Glenfield Road	51	0	157	36
	Macquarie Links	0	0	0	0
	St Helens Park	2	0	0	0
	Other Release Area	0	0	0	0
Campbelltown Total		103	8	165	36
Hawkesbury	Bligh Park 2	0	0	0	0
Hawkesbury Total		0	0	0	0
Liverpool	Aerodrome	0	100	117	0
	Cabramatta Creek	3	0	8	11
	Carnes Hill	4	19	8	11
	Edmondson Park	0	43	0	0
	Hinchinbrook	15	4	0	4
	Leppington North	0	0	0	0
	Pleasure Point	7	11	0	0
	Prestons	0	0	7	14
	South Hoxton Park	73	152	38	128
Liverpool Total		102	329	178	168
Penrith	Caddens Road	0	0	0	0
	Claremont Meadows Stage 2	46	8	0	0
	Glenmore Park	0	0	5	0
	Glenmore Park Expansion Area	0	0	250	19
	St Marys ADI (Jordan Springs)	0	0	18	308
	Waterside	28	120	32	0
Penrith Total		74	128	305	327
Pittwater	Warriewood Valley	0	2	7	11
	Other Release Area	0	0	0	0
Pittwater Total		0	2	7	11
The Hills	Balmoral Road	220	6	42	28
	Barina Downs Road	0	0	0	0
	Kellyville	18	27	2	0
	Mungerie Park	10	24	12	0
	North Kellyville	0	0	0	48
	Norwest Business Park	12	9	0	0
	Rouse Hill Regional Centre	44	0	110	0
The Hills Total		304	66	166	76
Warringah	Belrose	0	0	0	3
Warringah Total		0	0	0	3
Wollondilly	Camden Park	0	0	0	0
Wollondilly Total		0	0	0	0
Wyong	Blue Haven	0	2	0	0
	Hamlyn Terrace	7	0	19	0
	Louisiana Road	0	0	0	0
	Mardi	1	0	0	0
	North Wyong	6	0	0	0
	Tumbi Valley	0	0	0	0
	Wadalba	3	33	3	14
	Woongarra	0	0	12	0
Wyong Total		17	35	34	14
Sydney Region Greenfield Total		1,324	1,083	1,699	1,168

STEP 7. VACANT LOT STOCKS

Vacant lot stocks is the number of lots which exist at the end of the monitoring period that have been subdivided and serviced but do not have dwellings built or under construction. Vacant lot stocks include lots available for sale and lots held by builders or investors.

Table 3.7: Greenfield Vacant Lot Stock (Jan 2012 - Sep 2012)

LGA	Release Area	Jan 2012	April 2012	July 2012	Oct 2012
Blacktown	Alex Avenue (West)	0	0	0	0
	Area 20	0	0	0	0
	Bungarribee	7	1	81	153
	Castlebrook	122	116	56	46
	Colebee	55	60	124	106
	Pipeworks	2	2	0	0
	Plumpton	140	153	32	50
	Riverstone	0	0	0	0
	Second Ponds Creek	454	327	352	319
	St Marys ADI (Ropes Crossing)	130	114	242	175
Sunnyholt	65	69	33	30	
Blacktown Total		975	842	920	879
Camden	Elderslie	40	30	18	18
	Harrington Park	11	45	6	21
	Harrington Park II	94	159	117	124
	Manooka Valley	0	0	0	0
	Mount Annan South	46	77	85	67
	Narellan	44	55	26	26
	Oran Park	158	97	84	167
	Spring Farm	65	77	193	168
Turner Road	55	192	73	168	
Camden Total		513	732	602	759
Campbelltown	Edmondson Park	33	36	24	21
	Glenfield Road	36	34	77	79
	Macquarie Links	49	46	32	24
	St Helens Park	16	19	12	12
	Other Release Area	0	0	7	7
Campbelltown Total		134	135	152	143
Hawkesbury	Bligh Park 2	0	0	0	0
Hawkesbury Total		0	0	0	0
Liverpool	Aerodrome	0	103	202	174
	Cabramatta Creek	48	46	30	33
	Carnes Hill	124	128	74	76
	Edmondson Park	46	68	16	15
	Hinchinbrook	74	77	45	43
	Leppington North	0	0	0	0
	Pleasure Point	0	0	39	35
	Prestons	165	158	89	97
South Hoxton Park	93	127	142	191	
Liverpool Total		550	707	637	664
Penrith	Caddens Road	0	0	0	0
	Claremont Meadows Stage 2	78	58	45	41
	Glenmore Park	32	34	24	21
	Glenmore Park Expansion Area	92	64	221	188
	St Marys ADI (Jordan Springs)	65	27	28	276
Waterside	31	46	46	39	
Penrith Total		298	229	364	565
Pittwater	Warriewood Valley	25	27	13	24
Other Release Area	0	0	0	0	
Pittwater Total		25	27	13	24
The Hills	Balmoral Road	138	125	66	69
	Barina Downs Road	3	3	7	7
	Kellyville	135	154	92	85
	Mungerie Park	57	71	56	52
	North Kellyville	2	3	0	32
	Norwest Business Park	104	111	88	73
Rouse Hill Regional Centre	34	29	119	97	
The Hills Total		473	496	428	415
Warringah	Belrose	3	3	1	4
Warringah Total		3	3	1	4
Wollondilly	Camden Park	49	39	33	32
Wollondilly Total		49	39	33	32
Wyong	Blue Haven	N.A.	N.A.	9	9
	Hamlyn Terrace	N.A.	N.A.	33	25
	Louisiana Road	N.A.	N.A.	3	3
	Mardi	N.A.	N.A.	13	10
	North Wyong	N.A.	N.A.	81	81
	Tumbi Valley	N.A.	N.A.	0	0
	Wadalba	N.A.	N.A.	82	79
Woongarra	N.A.	N.A.	47	45	
Wyong Total		N.A.	N.A.	268	252
Sydney Region Greenfield Total		3,020	3,210	3,418	3,737

Note: Data sources for January and April 2012 are Sydney Water and for July and September 2012 are internal MDP databases. Vacant stock data for Wyong LGA not available prior to July 2012.

STEP 8. DWELLING APPROVAL

Approval of a development application to construct a dwelling or multiple dwellings.

Table 3.8: Greenfield Dwelling Approval (Jul-Dec 2011 - Jul-Sep 2012)

LGA	Release Area	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
Blacktown	Alex Avenue (West)	1	0	0	0
	Area 20	0	0	0	0
	Bungarabee	47	7	13	56
	Castlebrook	45	12	225	30
	Colebee	16	7	26	29
	Pipeworks	0	0	0	0
	Plumpton	19	10	11	16
	Riverstone	0	0	0	5
	Second Ponds Creek	292	179	167	124
St Marys ADI (Ropes Crossing)	24	6	38	87	
Sunnyholt	102	67	0	3	
Blacktown Total		546	288	480	350
Camden	Elderslie	43	9	10	20
	Harrington Park	2	3	8	9
	Harrington Park II	49	23	29	13
	Manooka Valley	0	0	0	0
	Mount Annan South	42	22	33	19
	Narellan	4	2	2	1
	Oran Park	61	77	33	59
	Spring Farm	55	13	19	27
Turner Road	76	23	86	86	
Camden Total		332	172	220	234
Campbelltown	Edmondson Park	22	7	45	4
	Glenfield Road	20	2	46	65
	Macquarie Links	2	5	9	12
	St Helens Park	0	0	1	0
	Other Release Area	0	0	0	0
Campbelltown Total		44	14	101	81
Hawkesbury	Bligh Park 2	0	0	0	0
Hawkesbury Total		0	0	0	0
Liverpool	Aerodrome	0	1	17	33
	Cabramatta Creek	20	3	14	6
	Carnes Hill	36	22	16	13
	Edmondson Park	47	11	33	21
	Hinchinbrook	9	1	21	6
	Leppington North	0	0	0	0
	Pleasure Point	0	0	15	6
	Prestons	11	11	15	13
South Hoxton Park	78	48	53	95	
Liverpool Total		201	97	184	193
Penrith	Caddens Road	0	0	0	0
	Claremont Meadows Stage 2	7	14	8	7
	Glenmore Park	7	0	1	5
	Glenmore Park Expansion Area	104	29	36	78
	St Marys ADI (Jordan Springs)	93	43	5	45
	Waterside	19	19	67	8
Penrith Total		230	105	117	143
Pittwater	Warriewood Valley	47	4	2	0
	Other Release Area	0	0	0	0
Pittwater Total		47	4	2	0
The Hills	Balmoral Road	161	56	23	150
	Barina Downs Road	0	0	1	0
	Kellyville	20	10	10	7
	Mungerie Park	10	6	7	11
	North Kellyville	0	2	0	50
	Norwest Business Park	9	10	10	14
Rouse Hill Regional Centre	23	12	12	21	
The Hills Total		223	96	63	253
Warringah	Belrose	1	0	0	4
Warringah Total		1	0	0	4
Wollondilly	Camden Park	15	4	10	2
Wollondilly Total		15	4	10	2
Wyong	Blue Haven	0	0	0	0
	Hamiyn Terrace	6	4	13	14
	Louisiana Road	0	0	0	0
	Mardi	5	3	4	4
	North Wyong	4	8	14	1
	Tumbi Valley	0	0	0	1
	Wadalba	12	4	9	3
Woongarra	16	9	22	16	
Wyong Total		43	28	62	39
Sydney Region Greenfield Total		1,682	808	1,239	1,299

STEP 9. DWELLINGS UNDER CONSTRUCTION

Dwellings under construction is the number of residential lots which have a building approval but do not yet have a completed dwelling. A lot with approval for multi-unit dwellings is recorded as a single lot.

Table 3.9: Greenfield Dwellings under Construction (Dec 2011 - Sep 2012)

LGA	Release Area	Jan 2012	April 2012	July 2012	Oct 2012
Blacktown	Alex Avenue (West)	1	0	0	0
	Area 20	0	0	0	0
	Bungarribee	29	18	70	53
	Castlebrook	65	57	82	51
	Colebee	32	34	62	59
	Pipeworks	1	1	2	2
	Plumpton	39	29	32	36
	Riverstone	0	6	0	0
	Second Ponds Creek	223	259	487	301
	St Marys ADI (Ropes Crossing)	64	70	138	107
	Sunnyholt	21	14	26	22
Blacktown Total		475	488	899	631
Camden	Elderslie	42	29	61	37
	Harrington Park	14	18	40	32
	Harrington Park II	65	53	91	65
	Manooka Valley	0	0	0	0
	Mount Annan South	73	59	101	83
	Narellan	12	11	16	16
	Oran Park	75	83	127	49
	Spring Farm	40	33	75	56
	Turner Road	32	58	176	114
Camden Total		353	344	687	452
Campbelltown	Edmondson Park	9	8	29	15
	Glenfield Road	7	2	80	51
	Macquarie Links	23	21	28	25
	St Helens Park	13	13	15	14
	Other Release Area	0	0	0	0
Campbelltown Total		52	44	152	105
Hawkesbury	Bligh Park 2	0	0	0	0
Hawkesbury Total		0	0	0	0
Liverpool	Aerodrome	0	1	12	9
	Cabramatta Creek	43	37	34	26
	Carnes Hill	58	56	91	54
	Edmondson Park	32	35	84	53
	Hinchinbrook	21	17	26	26
	Leppington North	0	0	0	0
	Pleasure Point	0	0	35	23
	Prestons	43	49	67	61
	South Hoxton Park	90	78	144	81
Liverpool Total		287	273	493	333
Penrith	Caddens Road	0	0	0	0
	Claremont Meadows Stage 2	33	46	72	42
	Glenmore Park	27	15	19	14
	Glenmore Park Expansion Area	50	48	133	62
	St Marys ADI (Jordan Springs)	89	82	123	93
	Waterside	26	35	108	84
Penrith Total		225	226	455	295
Pittwater	Warriewood Valley	48	45	31	13
	Other Release Area	0	0	0	0
Pittwater Total		48	45	31	13
The Hills	Balmoral Road	57	43	154	133
	Barina Downs Road	1	1	1	1
	Kellyville	59	61	76	63
	Mungerie Park	19	19	39	29
	North Kellyville	0	1	0	8
	Norwest Business Park	44	36	44	37
	Rouse Hill Regional Centre	37	31	51	33
The Hills Total		217	192	365	304
Warringah	Belrose	2	1	2	1
Warringah Total		2	1	2	1
Wollondilly	Camden Park	44	40	31	20
Wollondilly Total		44	40	31	20
Wyong	Blue Haven	N.A.	N.A.	0	0
	Hamlyn Terrace	N.A.	N.A.	9	3
	Louisiana Road	N.A.	N.A.	0	0
	Mardi	N.A.	N.A.	0	0
	North Wyong	N.A.	N.A.	0	0
	Tumbi Valley	N.A.	N.A.	0	0
	Wadalba	N.A.	N.A.	1	15
	Woongarrah	N.A.	N.A.	1	2
Wyong Total		N.A.	N.A.	11	20
Sydney Region Greenfield Total		1,703	1,653	3,126	2,174

Note: Data sources for January and April 2012 are Sydney Water and for July and September 2012 are internal MDP databases. Dwellings under construction data for Wyong LGA not available prior to July 2012.

STEP 10. DWELLING PRODUCTION

Dwelling production or net dwelling completions is the net additional number of completed dwellings (i.e. total number of new dwellings minus the number of existing dwellings) in the monitoring period.

Table 3.10: Greenfield Net Dwelling Completions (Jul-Dec 2011 to Jul-Sep 2012)

LGA	Release Area	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
Blacktown	Alex Avenue (West)	0	7	0	6
	Area 20	0	0	0	0
	Bungarrabee	25	12	16	29
	Castlebrook	116	15	40	54
	Colebee	30	9	9	12
	Pipeworks	0	0	1	0
	Plumpton	6	17	6	4
	Riverstone	0	0	2	1
	Second Ponds Creek	284	74	164	260
	St Marys ADI (Ropes Crossing)	73	26	45	97
	Sunnyholt	42	16	11	10
Blacktown Total		576	176	294	473
Camden	Elderslie	88	27	7	27
	Harrington Park	15	5	6	10
	Harrington Park II	35	22	32	28
	Manooka Valley	0	0	0	0
	Mount Annan South	61	6	27	22
	Narellan	4	1	2	2
	Oran Park	63	5	20	106
	Spring Farm	41	25	26	29
	Turner Road	77	10	26	89
	Other Release Area	0	0	1	0
Camden Total		384	101	147	313
Campbelltown	Edmondson Park	15	2	2	18
	Glenfield Road	51	2	3	51
	Macquarie Links	4	2	6	4
	St Helens Park	0	1	0	1
		Other Release Area	0	0	0
Campbelltown Total		70	7	11	74
Hawkesbury	Bligh Park 2	0	0	0	0
Hawkesbury Total		0	0	0	0
Liverpool	Aerodrome	0	0	0	4
	Cabramatta Creek	30	12	14	18
	Carnes Hill	82	13	19	42
	Edmondson Park	10	1	4	52
	Hinchinbrook	6	6	7	4
	Leppington North	0	16	1	0
	Pleasure Point	1	1	7	16
	Prestons	21	5	8	8
	South Hoxton Park	64	12	62	70
		Other Release Area	2	0	0
Liverpool Total		216	66	122	214
Penrith	Caddens Road	0	0	0	0
	Claremont Meadows Stage 2	35	1	10	31
	Glenmore Park	6	7	14	5
	Glenmore Park Expansion Area	22	23	68	86
	St Marys ADI (Jordan Springs)	35	26	53	82
	Waterside	51	5	33	85
Penrith Total		149	62	178	289
Pittwater	Warriewood Valley	17	4	26	138
		Other Release Area	2	0	7
Pittwater Total		19	4	33	139
The Hills	Balmoral Road	27	1	23	62
	Barina Downs Road	0	0	0	0
	Kellyville	21	39	12	37
	Mungerie Park	27	4	1	12
	North Kellyville	0	0	0	11
	Norwest Business Park	34	10	18	20
	Rouse Hill Regional Centre	31	8	18	29
The Hills Total		140	62	72	171
Warringah	Belrose	0	1	0	1
Warringah Total		0	1	0	1
Wollondilly	Camden Park	33	14	26	12
Wollondilly Total		33	14	26	12
Wyong	Blue Haven	1	0	0	0
	Hamlyn Terrace	6	7	6	35
	Louisiana Road	0	0	0	0
	Mardi	11	3	3	3
	North Wyong	11	4	5	0
	Tumbi Valley	0	0	0	1
	Wadalba	15	2	6	3
Woongarra	21	5	8	22	
	Other Release Area	1	0	0	0
Wyong Total		66	21	28	64
Sydney Region Greenfield Total		1,653	514	911	1,750

SUMMARY STEPS 5 - 10

Table 3.11: Greenfield Development Pipeline (September Quarter, 2012)

LGA	Release Area	Step 5 DA Approved (Subdivision)	Step 6 Lot Production	Step 7 Vacant Lots	Step 8 Dwelling Approval	Step 9 Dwellings Under Construction	Step 10 Dwelling Production
Blacktown	Alex Avenue (West)	0	0	0	0	0	6
	Area 20	0	0	0	0	0	0
	Bungarribee	2	110	153	56	53	29
	Castlebrook	49	0	46	30	51	54
	Colebee	0	0	106	29	59	12
	Pipeworks	0	0	0	0	2	0
	Plumpton	4	25	50	16	36	4
	Riverstone	20	0	0	5	0	1
	Second Ponds Creek	56	27	319	124	301	260
	St Marys ADI (Ropes Crossing)	367	14	175	87	107	97
Sunnyholt	2	2	30	3	22	10	
Blacktown Total		500	178	879	350	631	473
Camden	Elderslie	24	0	18	20	37	27
	Harrington Park	0	18	21	9	32	10
	Harrington Park II	0	16	124	13	65	28
	Manooka Valley	0	0	0	0	0	0
	Mount Annan South	0	0	67	19	83	22
	Narellan	0	2	26	1	16	2
	Oran Park	0	159	167	59	49	106
	Spring Farm	35	0	168	27	56	29
Turner Road	0	160	168	86	114	89	
Camden Total		59	355	759	234	452	313
Campbelltown	Edmondson Park	57	0	21	4	15	18
	Glenfield Road	10	36	79	65	51	51
	Macquarie Links	0	0	24	12	25	4
	St Helens Park	0	0	12	0	14	1
	Other Release Area	0	0	7	0	0	0
Campbelltown Total		67	36	143	81	105	74
Hawkesbury	Bligh Park 2	0	0	0	0	0	0
Hawkesbury Total		0	0	0	0	0	0
Liverpool	Aerodrome	5	0	174	33	9	4
	Cabramatta Creek	0	11	33	6	26	18
	Carnes Hill	0	11	76	13	54	42
	Edmondson Park	105	0	15	21	53	52
	Hinchinbrook	6	4	43	6	26	4
	Leppington North	0	0	0	0	0	0
	Pleasure Point	0	0	35	6	23	16
	Prestons	3	14	97	13	61	8
	South Hoxton Park	6	128	191	95	81	70
Liverpool Total		125	168	664	193	333	214
Penrith	Caddens Road	0	0	0	0	0	0
	Claremont Meadows Stage 2	6	0	41	7	42	31
	Glenmore Park	0	0	21	5	14	5
	Glenmore Park Expansion Area	8	19	188	78	62	86
	St Marys ADI (Jordan Springs)	0	308	276	45	93	82
	Waterside	0	0	39	8	84	85
Penrith Total		14	327	565	143	295	289
Pittwater	Warriewood Valley	2	11	24	0	13	138
	Other Release Area	0	0	0	0	0	1
Pittwater Total		2	11	24	0	13	139
The Hills	Balmoral Road	172	28	69	150	133	62
	Barina Downs Road	0	0	7	0	1	0
	Kellyville	2	0	85	7	63	37
	Mungerie Park	0	0	52	11	29	12
	North Kellyville	141	48	32	50	8	11
	Norwest Business Park	0	0	73	14	37	20
Rouse Hill Regional Centre	2	0	97	21	33	29	
The Hills Total		317	76	415	253	3047	171
Warringah	Belrose	0	3	4	4	1	1
Warringah Total		0	3	4	4	1	1
Wollondilly	Camden Park	0	0	32	2	20	12
Wollondilly Total		0	0	32	2	20	12
Wyong	Blue Haven	0	0	9	0	0	0
	Hamlyn Terrace	0	0	25	14	3	35
	Louisiana Road	0	0	3	0	0	0
	Mardi	0	0	10	4	0	3
	North Wyong	2	0	81	1	0	0
	Tumbi Valley	0	0	0	1	0	1
Wadalba	5	14	79	3	15	3	
Woongarra	0	0	45	16	2	22	
Wyong Total		7	14	252	39	20	64
Sydney Region Greenfield Total		1,091	1,168	3,737	1,299	2,174	1,750

GREENFIELD - AVERAGE LOT SIZE

Table 3.12: Greenfield Release area average residential lot size (sqm) (Jul-Dec 2011 to Jul-Sep 2012)

LGA	Release Area	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
Blacktown	Alex Avenue (West)	0	350	403	0
	Area 20	0	0	0	0
	Bungarribee	0	0	541	438
	Castlebrook	442	396	522	0
	Colebee	766	645	529	0
	Pipeworks	0	0	0	0
	Plumpton	541	0	0	536
	Riverstone	0	0	0	0
	Second Ponds Creek	468	554	476	458
	St Mary's ADI (Ropes Crossing)	349	406	380	281
Sunnyholt	454	0	482	864	
Blacktown Average		455	522	468	447
Camden	Elderslie	534	340	596	0
	Harrington Park	0	0	347	485
	Harrington Park II	0	824	0	916
	Manooka Valley	0	0	0	0
	Mount Annan South	683	538	775	0
	Narellan	0	0	0	376
	Oran Park	504	0	576	532
	Spring Farm	340	429	463	0
Turner Road	507	539	547	505	
Camden Average		497	590	535	534
Campbelltown	Edmondson Park	491	230	339	0
	Glenfield Road	294	0	417	532
	Macquarie Links	0	0	0	0
	St Helens Park	393	0	0	0
Campbelltown Average		391	230	413	532
Liverpool	Aerodrome	0	527	545	0
	Cabramatta Creek	318	0	560	503
	Carnes Hill	486	530	366	432
	Edmondson Park	0	482	0	0
	Hinchinbrook	577	334	0	410
	Prestons	386	0	557	458
South Hoxton Park	424	405	476	441	
Liverpool Average		441	460	523	445
Penrith	Caddens Road	0	0	0	0
	Claremont Meadows Stage 2	607	364	0	0
	Glenmore Park	0	0	664	0
	Glenmore Park Expansion Area	0	0	434	263
	St Mary's ADI (Jordan Springs)	0	0	490	403
Waterside	501	376	474	0	
Penrith Average		567	376	445	395
Pittwater	Warriewood Valley	0	348	4,302	344
Pittwater Average		0	348	4,302	344
The Hills	Balmoral Road	657	701	653	362
	Barina Downs Road	0	0	0	0
	Kellyville	698	798	546	0
	Mungerie Park	457	484	693	0
	North Kellyville	0	0	0	541
	Norwest Business Park	758	799	0	0
Rouse Hill Regional Centre	469	0	415	0	
The Hills Average		629	675	497	475
Warringah	Belrose	0	0	0	732
Warringah Average		0	0	0	732
Wollondilly	Camden Park	0	0	0	0
Wollondilly Average		0	0	0	0
Wyong	Blue Haven	0	356	0	0
	Hamlyn Terrace	610	0	557	0
	Louisiana Road	0	0	0	0
	Mardi	870	0	0	0
	North Wyong	347	0	0	0
	Tumbi Valley	0	0	0	0
	Wadalba	563	685	607	516
Woongarra	0	0	633	0	
Wyong Average		518	681	588	516
Sydney Region Greenfield Average		513	529	495	464

Note: Average lot size data has been revised as part of the 2012 Greenfield Audit and may differ slightly from previous reports.



4. EXISTING URBAN AREAS GROWTH LOCATIONS

GROWTH LOCATIONS - DWELLING PRODUCTION (SAMPLE)

Table 4.1: Growth Locations - Net Dwelling Completions (Jul-Dec 2011 to Jul-Sep 2012)

Subregion	LGA	Growth Location Name	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
Sydney CBD	Sydney City	City Centre	212	111	42	0
		Pyrmont/Ultimo	0	0	143	0
		City East	145	33	0	0
		Glebe/Camperdown	12	12	0	2
		Surry Hills/Redfern	29	4	96	58
		Green Square	120	1	153	647
		Alexandria/Rosebery	19	0	0	0
		Newtown/Erskineville	0	0	1	1
East	Botany Bay	Botany Precinct	17	1	0	1
		Mascot Station	0	0	0	0
	Randwick	Bundock Street Precinct	0	0	0	0
		Endeavour House, South Coogee	77	27	2	0
		Former Prince Henry Hospital Site	121	6	67	27
		Kensington Town Centre	0	89	0	0
		Kingsford Town Centre	111	8	0	1
		Maroubra Town Centre	1	22	0	0
	Waverley	Bondi Beach Commercial Area	40	0	0	0
		Bondi Junction Town Centre	40	20	0	0
South	Hurstville	Hurstville CBD	0	0	0	47
		Riverwood Station Precinct	0	0	0	1
	Kogarah	Carlton Station Precinct	12	0	0	0
		Kogarah Town Centre	42	21	42	17
	Marrickville	Newtown Station Precinct	5	1	0	3
		St Peters Station Precinct	9	1	7	7
		Stanmore Station Precinct	0	0	1	0
	Rockdale	Bonar Street Precinct	308	0	0	94
		Brighton le Sands Town Centre	0	20	0	0
		Rockdale Town Centre	17	2	0	0
		Wolli Creek Growth Redevelopment Area	89	0	0	77
	Sutherland	Carringbah Growth Location	41	0	0	0
		GyMEA Village	55	0	0	0
Sutherland Town Centre		58	0	8	35	
Inner West	Ashfield	Ashfield Town Centre	28	0	0	0
	Burwood	Burwood Town Centre	214	0	0	0
	Canada Bay	Abbotsford Point	0	9	1	0
		Breakfast Point	144	1	35	138
		Five Dock Village	0	20	0	0
		Former Westinghouse Brakes Site	0	0	0	0
		Parramatta Road Corridor - Canada Bay	29	0	62	1
		Rhodes Peninsula	128	233	0	195
	Leichhardt	The Riviera (Former BHP Site)	109	0	0	0
		Leichhardt Precinct	2	1	0	3
	Strathfield	Lewisham Station Precinct	0	0	0	0
Homebush (North M4) Precinct		0	0	0	39	
Homebush West Precinct		0	0	0	0	
		Parramatta Road Corridor - Strathfield	0	0	0	10
Inner North	Lane Cove	St Leonards Town Centre - Lane Cove	49	0	0	0
		Neutral Bay Town Centre	0	0	0	11
		North Sydney Centre	92	0	0	0
	Ryde	St Leonards Town Centre - North Sydney	0	0	0	77
		Macquarie Corridor	0	2	0	0
		Meadowbank Employment Area	0	0	0	0
Willoughby	Chatswood City Centre	0	17	0	0	
North	Hornsby	Epping Town Centre - Hornsby	1	1	0	0
		Hornsby-Waitara Town Centre	16	0	0	0
		Normanhurst Station Precinct	0	2	1	1
		Thornleigh Station Precinct	2	0	2	1

GROWTH LOCATIONS - DWELLING PRODUCTION (SAMPLE)

Table 4.1: Growth Locations - Net Dwelling Completions (cont)

Subregion	LGA	Growth Location Name	Jul-Dec 2011	Jan-Mar 2012	Apr-Jun 2012	Jul-Sep 2012
North	Ku-Ring-Gai	Gordon Town Centre	0	65	153	47
		Killara Precinct	77	0	6	0
		Lindfield Town Centre	24	0	15	24
		Pymble Town Centre	81	0	0	0
		Roseville Town Centre	44	0	0	0
		St Ives Town Centre	43	0	83	0
		Turrumurra Town Centre	55	0	24	0
North East	Warringah	Brookvale West Precinct	30	32	12	0
		Dee Why RSL	70	0	0	0
		Dee Why Town Centre	0	0	0	0
		North Narrabeen Precinct	24	36	0	0
Central West	Auburn	Auburn Town Centre	16	1	8	0
		Berala Small Village	10	0	6	0
		Former RAAF Site	15	0	0	0
		Lidcombe Hospital Precinct	82	39	28	9
		Lidcombe Town Centre	114	0	0	0
		Sydney Olympic Park	0	216	0	0
		Wentworth Point	215	0	0	301
	Bankstown	Bankstown CBD Fringe	14	19	36	3
		Bass Hill Shopping Centre	25	6	6	7
		Padstow Shopping Centre	2	2	0	1
		Revesby Shopping Centre	28	2	0	1
	Fairfield	Bonnyrigg Housing Estate	0	0	0	0
		Fairfield Town Centre	45	0	39	0
		Villawood Station Precinct	0	0	0	1
	Holroyd	Guildford Station Precinct	0	0	0	1
		Lakewood	38	9	125	35
		Merrylands Town Centre	45	0	0	0
		Nelson's Ridge	37	9	53	38
		Pendle Hill Station Precinct	5	1	4	3
	Parramatta	Brick Works Master Plan Area	5	2	0	15
		Briens Road Master Plan Area	0	0	0	0
		Collet Park Precinct	2	4	2	1
		Granville Town Centre	1	0	27	4
		Guildford Precinct	1	12	4	0
		Merrylands Precinct	57	0	16	0
		Parramatta City Centre	128	0	78	59
		Parramatta City Centre South Precinct	7	0	6	8
		Rosehill Precinct	16	0	81	23
		South Granville Precinct	1	11	3	4
		Teloepa Urban Renewal Project	0	51	0	75
Toongabbie Precinct		8	14	6	1	
Wentworthville Precinct		0	4	4	0	
Westmead Precinct	13	0	0	0		
North West	Blacktown	Doonside Station Precinct	8	9	0	2
		Mount Druitt Town Centre	77	0	1	22
		Seven Hills Station Precinct	2	0	7	0
	Blue Mountains	Blaxland Station Precinct	2	3	0	5
		Katoomba Station Precinct	2	0	0	0
	Penrith	Kingswood Station Precinct	2	1	0	0
		Werrington Station Precinct	45	3	0	1
	The Hills	Mercer Street Precinct	0	0	0	68
	South West	Campbelltown	Airds (Links)	0	0	0
Leumeah Station Precinct			0	3	0	0
Macarthur Gardens			25	14	31	1
Minto Housing Estate			48	19	15	22
Park Central			32	2	5	5
Liverpool		Liverpool City Centre	2	0	0	54
		Liverpool Hume Highway Corridor	2	1	0	4
	Moorebank Precinct	99	35	29	32	



GLOSSARY

BUILDING TYPE:

- **DETACHED HOUSE** – a detached building primarily used for long term residential purposes. It consists of one dwelling unit.
- **MEDIUM DENSITY** - new semi-detached, row or terrace house, townhouse or duplex, etc or new flat, unit or apartment in a building of one or two storeys.
- **1-3 STOREYS** - new flat, unit or apartment in a building of one, two or three storeys.
- **4+ STOREYS** - new flat, unit or apartment in a building of four or more storeys.
- **ALTERATIONS AND CONVERSIONS** - carried out on existing residential buildings, which results in the creation of new dwelling units.
- **MULTI-UNIT** – includes dwellings which are semi-detached, row or terrace house, villas, townhouses, units or apartments buildings.

DWELLING APPROVAL - Approval of a development application to construct a dwelling or multiple dwellings. In the quarterly monitor is only for residential buildings and does not include conversions and dwelling units approved as part of the alterations and additions or the construction of non-residential buildings.

DWELLINGS UNDER CONSTRUCTION – a residential building lot which has a building approval but does not yet have a completed dwelling (i.e. building with a water meter connected). A lot with approval for multi-unit dwellings is recorded as a single lot.

GREENFIELD DEVELOPMENT PIPELINE – the land supply, servicing and lot and dwelling construction process. Measured in ten steps from the release of land by the State Government, rezoning, servicing with trunk and lead in water and wastewater infrastructure, subdivision approval, lot production, vacant lot stock, dwelling approval, dwellings under construction and dwelling completion.

GREENFIELD DWELLING APPROVAL - dwelling approval in the greenfield development pipeline refers to the number of new dwellings approved on an englobo site in a greenfield release area minus the number of existing dwellings being demolished.

GREENFIELD RELEASE AREA – new metropolitan fringe area released by State Government for residential development and formally included on the Metropolitan Development Program.

GROWTH LOCATIONS – centres, transit nodes, suburban precincts, urban renewal sites or former brownfield industrial sites where there is current dwelling activity.

LOT PRODUCTION – is the count of new residential building lot registrations as included in NSW Land and Property Information cadastre in residential zones in greenfield release areas that are rezoned and serviced with Lead in Infrastructure.

NET DWELLING COMPLETION/PRODUCTION - the number of completed dwellings added to the existing stock, adjusted for demolitions.

As an example, a two unit development that demolishes one house will only be counted as one additional dwelling.

RELEASED - the NSW Government decision to release fringe metropolitan land for urban purposes and to place it on the MDP. In many cases the decision to release land follows regional structure planning. The release step is a prerequisite to rezoning.

REZONED WITH LEAD IN INFRASTRUCTURE - release areas that have been rezoned and have water and wastewater infrastructure constructed to the edge of a release area to link the edge of the development with the available trunk infrastructure - trunk/feeder mains, release area pumping stations and trunk carriers.

REZONED WITH TRUNK INFRASTRUCTURE - release areas that have been rezoned and are serviced with water and waste water trunk infrastructure i.e. the capacity of water and waste water trunk infrastructure to service a release area - water service reservoirs, pumping stations, sewage treatment plants and existing larger pipes that feed that infrastructure.

SUBDIVISION APPROVAL - approval of a development application for subdivision. In some cases an integrated development application may be approved for both subdivision and dwellings.

VACANT LOT STOCKS - is the number of lots which exist at the end of the monitoring period that have been subdivided and serviced but do not have dwellings built or under construction. Vacant lot stocks include lots available for sale and lots held by builders or investors.

DATA SOURCES

AVERAGE LOT SIZE - NSW Land and Property Information and internal MDP Databases

DWELLING APPROVALS – Australian Bureau of Statistics

DWELLINGS UNDER CONSTRUCTION - internal MDP Databases

GREENFIELD DWELLING APPROVALS – Greenfield Councils, Joint Regional Planning Panel and NSW Department of Planning and Infrastructure

GREENFIELD SUBDIVISION APPROVALS – Greenfield Councils, Joint Regional Planning Panel and NSW Department of Planning and Infrastructure

LEAD IN INFRASTRUCTURE - Sydney Water, Wyong Council, development industry and internal MDP Databases

LOT PRODUCTION – NSW Land and Property Information and internal MDP Databases

NET DWELLING COMPLETIONS - Sydney Water Business Intelligence Enterprise Data Warehouse and Gosford and Wyong Councils

REZONED GREENFIELD STOCK – internal MDP Databases

TOTAL GREENFIELD STOCK - internal MDP Databases

TRUNK INFRASTRUCTURE STOCK – Sydney Water, Wyong Council, development industry and internal MDP Databases

VACANT LOT STOCKS - internal MDP Databases

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