Canterbury Residential Development Strategy

Prepared for:

Canterbury City Council

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Grech | Lawrence | New

Canterbury Residential Development Strategy

Final Report

August 2013

Prepared for
Canterbury City Council

By

GLN Planning Pty Ltd
ABN 39 585 269 237

Level 10, 66 King Street Sydney NSW 2000
GPO Box 5013 Sydney NSW 2001

P [02] 9249 4100
F [02] 9249 4111
E info@glnplanning.com.au
W glnplanning.com.au

GLN Planning Pty Ltd
ABN 39 585 269 237

Level 10, 66 King Street Sydney NSW 2000
GPO Box 5013 Sydney NSW 2001

P [02] 9249 4100 | E info@glnplanning.com.au
F [02] 9249 4111 | W glnplanning.com.au

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Executive Summary

The Residential Development Strategy (or **RDS**) has been prepared to ensure that the right package of zonings, development controls and planning framework are in place to guide and cater for the growth of the Canterbury residential community and be consistent with the State Government's metropolitan housing agenda to at least 2031.

There are over 50,000 private dwellings in Canterbury LGA accommodating approximately 146,000 residents in 2012. The local community is diverse, both socially and economically. The LGA is home to residents from over 129 different countries, and almost half the population was born in non-English speaking countries. Canterbury LGA is a destination for a relatively large number of overseas migrants. This cultural diversity has a profound effect on the demand for housing in the area.

The LGA provides some of the most accessible and affordable housing in the Sydney region. Key characteristics of the housing include:

- Significant numbers of 2 bedroom dwellings suited to the early household formation years.
- A significant number of social housing dwellings.
- A diversity of housing age and condition.
- Many housing types and price-points represented, from more affordable private rental housing in Lakemba / Wiley Park to executive style dwellings in Earlwood.

The construction of new housing fluctuates year-on-year, but dwelling creation over the last decade or so has remained solid at around 246 dwellings per year. This result is generally in line with the housing targets that have been set for the area. The predominant housing types that have been created in recent times have been dual occupancies and town houses, yet all styles have been added to the housing stock

There is substantial capacity for further dwellings to be created in the area and hence there is no reason why Canterbury LGA could not continue to meet its existing dwelling targets. However, more recent projections for population growth have been incorporated in the Draft Metropolitan Strategy for Sydney. Whilst new targets have not yet been set for the LGA, these are likely to increase and the RDS needs to responsibly examine opportunities to enable annual dwelling approvals increase to cater for its proportion of the growing population. This will involve selectively rezoning some land and massaging existing controls to provide greater incentive for re-development on land which reinforces the urban structure of Canterbury and the amenity for future residents. The package of amendments will ensure a range of builders and developers are involved in contributing the Canterbury's growth.

The RDS includes tools to assist decision-makers in reviewing and adjusting development strategies: a decision-making framework for planning proposals and a residential development feasibility model.

The decision-making framework provides a reference for assessing requests to modify planning controls. Some 30 LEP submissions were assessed using these tools. The results of those assessments are included in this RDS.

1.0 Introduction

This document sets out Canterbury City Council's Residential Development Strategy to the year 2031. Its principal purpose is to ensure that the right package of zonings and development controls are in place to deliver housing to cater for the needs of the existing and incoming population in that area. To do this, the Strategy needs to examine the following:

- The current development of Canterbury, its population, urban structure and opportunities and constraints to growth.
- The drivers of residential demand and supply in the Canterbury LGA.
- The preferred package of planning controls as a basis to provide sufficient opportunities for ongoing residential investment to deliver a range of dwelling types.
- The planning framework required to consider future Planning Proposals, and timeframes for bringing new opportunities into the planning system.

The planning system in NSW and indeed much of Australia relies substantively on private developers, rather than public authorities, constructing dwellings to meet the housing needs of the community. The NSW Department of Housing does build or maintain dwellings for residents that meet financial or special needs demand. However, the vast majority of new housing constructed will only occur if there is the right package of planning controls which, together with the market forces, provide economic incentive for private sector builders and developers to be involved in the process.

The Residential Development Strategy is therefore an extremely important tool to give an understanding of the factors that are going to drive the demand for new housing into the future and to ensure there are sufficient development opportunities for both the private and public sectors to meet this demand.

The role of Council in this process is fundamental. It is increasingly necessary for Council to understand the trends that contribute to the market and ensure that the opportunities available under the planning controls are available, economically viable and might reasonably be taken up in the timeframe of the planning period. In turn, Council must ensure the opportunities to be created by the planning controls deliver important strategic outcomes affecting the lifestyles and amenity of existing and future residents, including maximizing access to public transport, services and facilities, and ensuring appropriate levels of amenity to all.

The Draft Metropolitan Strategy for Sydney to 2031 anticipates much higher growth rates and higher dwelling targets for all LGAs in the Sydney Region over the next 18 years consistent with the latest immigration and growth forecasts. In Canterbury LGA, the current annual target is 260 dwellings per year which Council has consistently met. The new target for Canterbury LGA has not yet been set.

The RDS is not simply about targets, but also needs to identify sufficient opportunities for a full range of housing types in various locations and at various price points for the growing community. Ideally, the planning controls should allow opportunities for a combination of small, medium and large builders and developers to be active in constructing these dwellings.

Canterbury LGA's most recent residential development strategy was prepared in 1996. This RDS will become the most recent stage in the evolution of housing development in Canterbury LGA. The LGA in 2011 had some 50,000 dwellings made up of a range of housing types. There is also a current planning and zoning framework that has informed the development pattern. This RDS and its recommendations therefore respects, and seeks to improve upon, the existing framework where that is necessary or desirable.

The Council will from time to time receive requests to amend the planning and zoning framework. The RDS provides a platform for Council to properly consider and determine these requests.To address the range of issues necessary to prepare the RDS, the report has been structured to address the following objectives:

- Examine the current development of Canterbury LGA focussing on its population, urban structure and residential housing trends.
- Identify and discuss the drivers of housing supply and demand in the Canterbury LGA.
- Track how Canterbury LGA and surrounding LGAs are performing against the dwelling creation targets that have been set by the State Government.
- Determine the development capacity available from existing zonings to continue to provide a range of housing and any constraints to growth within these areas.
- Assess whether the current planning controls are likely to provide sufficient opportunities for ongoing residential investment to deliver a range of dwelling types and meet the dwelling targets.
- Identify a planning framework for Council to consider Planning Proposals that may be required to provide sufficient opportunities for ongoing investment in a wide range of dwelling types to house the people of Canterbury LGA.

These objectives above broadly form the structure of this report.

2.0 Canterbury LGA, its community and housing

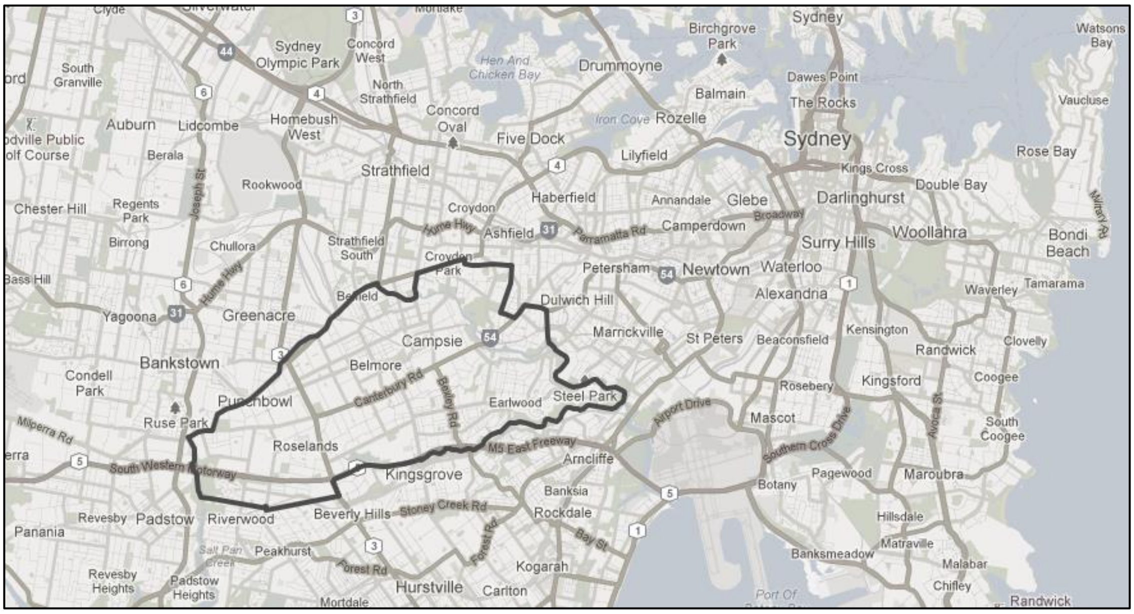
There is a great deal of research which confirms that over 50 percent of purchasers in a new project will come from within 10 kilometres of the development and over 70 percent from within 20 kilometres. This is not so surprising given that people do not like to move too far from existing social networks and will typically purchase new property in the same submarket where they have some knowledge or experience.

Understanding the existing community, urban structure and the local housing options in an area is extremely important as these reflect the market, likely housing choices and platform for investment in future housing in the area.

2.1 Overview of Canterbury LGA

Canterbury Local Government Area (**LGA**) is a middle ring local government area located in the south sub region of Sydney, as defined by the Department of Planning and Infrastructure in its Metropolitan Strategy. The other LGAs in the same subregion include Hurstville, Kogarah, Marrickville, Rockdale and Sutherland. From a housing market perspective, the adjoining LGAs will play an important role providing housing opportunities and market potentially influencing the dynamics of Canterbury LGA.

The Canterbury LGA is situated between 11 and 20 kilometres to the south-west of Sydney CBD (**Figure 2.1**). The LGA comprises 17 suburbs and includes the key town centres of Campsie, Lakemba and Earlwood and one of Australia's earliest stand-alone shopping centres at Roselands. It benefits from 2 railways lines: the Bankstown Line and the East Hills Line. There are 8 stations located within the LGA and several near the LGA boundary in other council areas, making Canterbury one of the better served areas in Sydney for rail transport.



Source: Atlas.id, 2011

Figure 2.1 Location of Canterbury LGA

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2.2 The Community

The estimated resident population of the LGA in 2012 was 146,314. The estimated resident population of Canterbury LGA has fluctuated since the turn of the century. Recently there has been substantial growth in the local population, reversing several years of static or declining population before that, as shown in **Table 2.1**.

Table 2.1 Estimated resident population, Canterbury LGA, 2001-2012

Year	ERP	Change
2001	137,492	
2002	136,542	-950
2003	135,244	-1,298
2004	134,437	-807
2005	134,705	268
2006	135,605	900
2007	137,206	1,601
2008	139,657	2,451
2009	141,708	2,051
2010	143,597	1,889
2011	144,751	1,154
2012	146,314	1,563

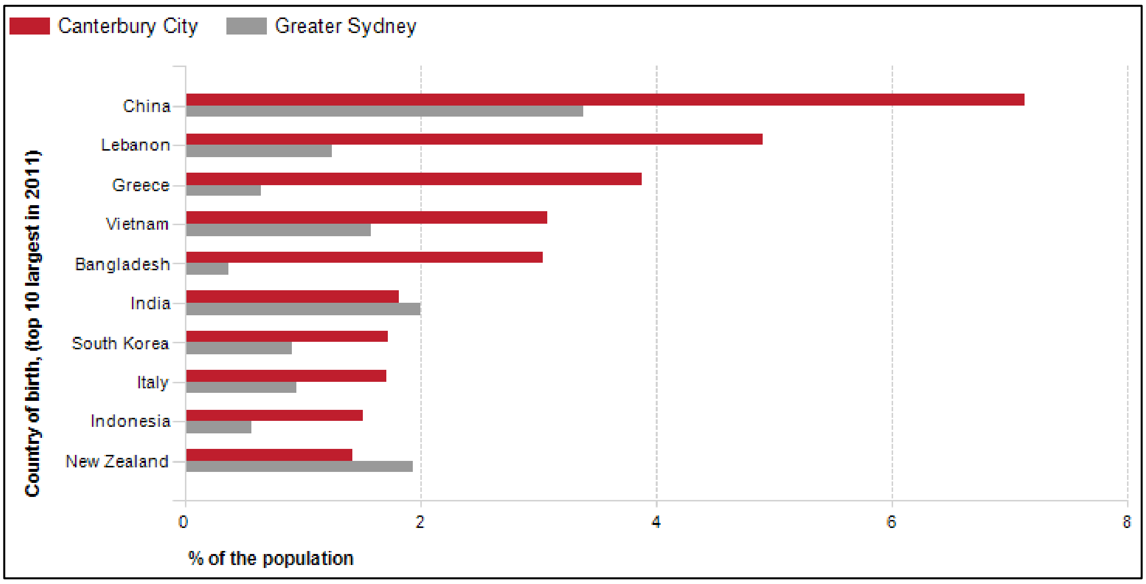
Source: ABS catalogue No. 3218.0

The community profile prepared by profile.id notes that the number of recent arrivals in an area is often determined by housing affordability, employment opportunities and pre-existing communities located in the area.

Canterbury LGA is highly multicultural (**Figure 2.2**). Since 2006, 13,263 new arrivals to Australia now live in Canterbury.

In 2011, 48 percent of all Canterbury LGA residents were born overseas and 45 percent were from a non-English speaking background, compared with 34.2 percent and 26.3 percent respectively for the Greater Sydney area. The most represented groups of overseas born residents residing in Canterbury include people from China (7.1 percent), Lebanon (4.3 percent), Greece (3.9 percent) and Bangladesh (3.0 percent).

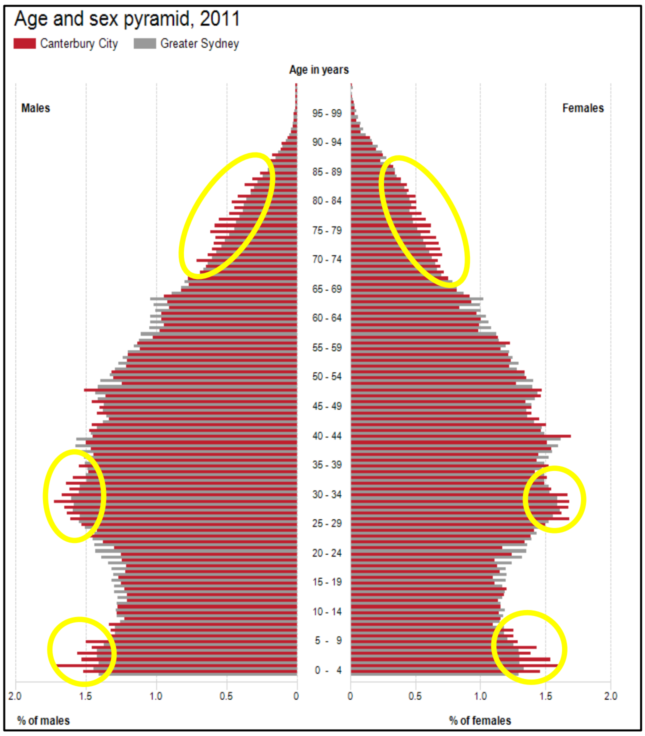
The dwellings that accommodate these ethnic groupings are significant in hosting recent arrivals of the same ethnic origin within Canterbury LGA.



Source: Profile.id, 2011

Figure 2.2 Country of Birth - comparison between Canterbury and Greater Sydney

The age structure of Canterbury LGA in comparison to Greater Sydney is illustrated within **Figure 2.3**. The figure highlights that Canterbury LGA has a much older demographic in comparison with Greater Sydney particularly between the 70-85 year age bracket. The other spikes in age when compared to the Greater Sydney average show an increase in young children aged 0-5 years and for young adults aged between their mid 20s - mid 30s (household and family formation periods) living within the Canterbury LGA.



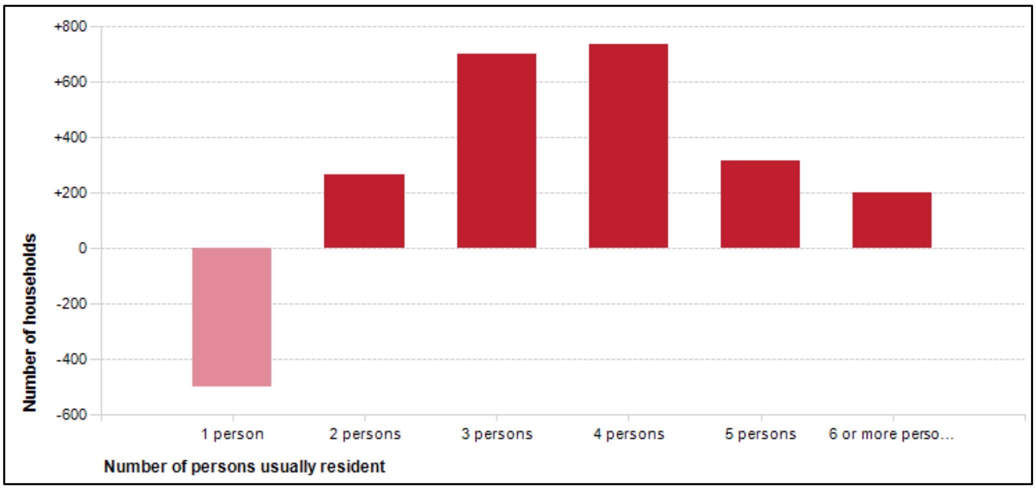
Source: Profile.id, 2011

Figure 2.3 Canterbury and Sydney age pyramid

Canterbury LGA residents live in 51,239 dwellings comprising a broad mix of dwelling types. Images showing the range of housing styles in Canterbury are included in **Appendix A**.

Canterbury LGA comprises 48,462 households. The biggest increase in households between 2006 and 2011 was couples with children (up 1,167 households) and couples without children, which increased 525 households. Lone person households decreased by 440 households. Group households increased 137 persons. Interestingly, the largest decrease was in young lone person households (-439 persons), almost offset by young couples without children (434 persons). Older lone person households increased by only 66 persons.

Notwithstanding the relatively large number of smaller dwelling sizes in Canterbury LGA (i.e. 2 bedrooms or less), there are fewer 1 person households (21.2 percent) and 2 person households (27.8 percent) compared to Greater Sydney (22.6 percent and 30.7 percent, respectively). This has resulted in a higher than average dwelling occupancy rate. The average household size is 2.83 persons per dwelling, which is higher than Greater Sydney of 2.63 persons per dwelling. Also, 38 percent of households are made up of couples with children compared to 35 percent in Greater Sydney. **Figure 2.4** provides evidence of the growing household size in recent years.



Source: Profile.id, 2011

Figure 2.4 Change in household size in Canterbury LGA from 2006 to 2011

The relatively affordable housing in Canterbury LGA Canterbury is matched by its population having lower incomes, on average, compared to Greater Sydney. Overall, only 12.3 percent of the households in Canterbury LGA earned a high income (those earning $2,500 per week or more), and 25.4 percent had low incomes (those earning less than $600 per week), compared with 23.6 percent and 18.3 percent respectively for Greater Sydney.

The highest household incomes are evident in the eastern areas of Earlwood, Ashbury and Hurlstone Park, and some southern areas. The lowest household incomes are in Wiley Park and North Lakemba (**Figure 2.5**).

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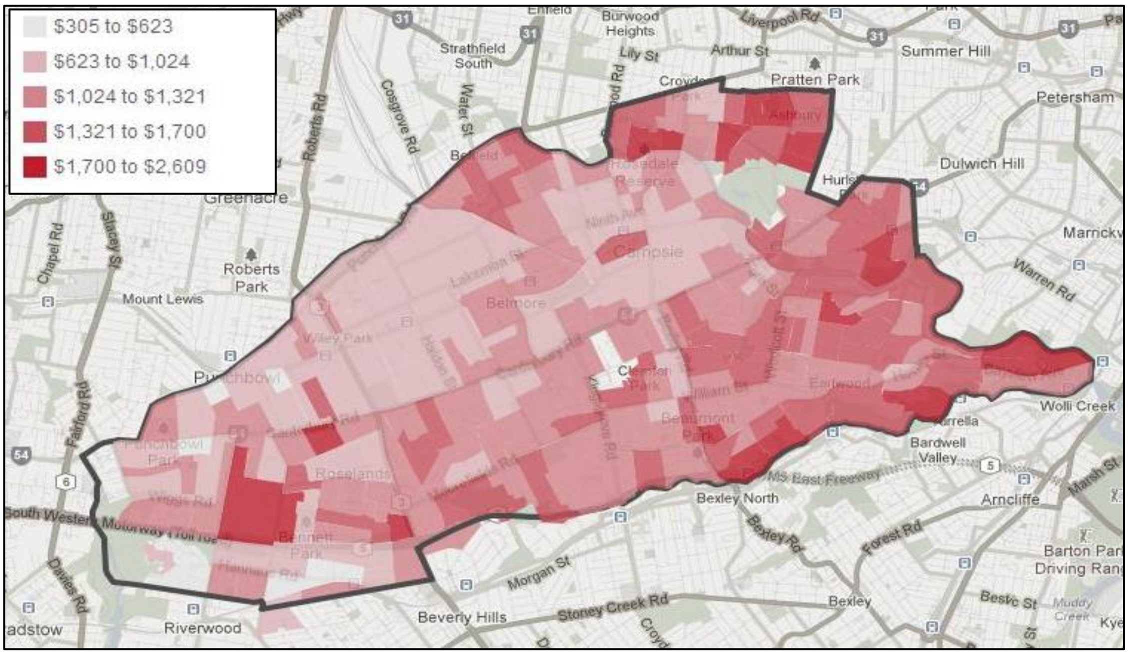

Source: Atlas.id, 2011

Figure 2.5 Median weekly household incomes in Canterbury LGA (Atlas.id, 2011)

There appears to be a strong correlation between incomes and predominant dwelling type, with higher incomes generally being associated with detached dwellings, and lower incomes with medium and higher density attached dwellings.

2.3 Urban structure

There is a relatively clear urban structure within Canterbury LGA that has emerged in response to market forces and reinforced by various planning controls over time.

The LGA's predominant housing form is single, detached dwelling houses. However, there is also a range of other dwelling types from 1 and 2 storey villas / town houses (having private open space at ground level), semi-detached dwellings or dual occupancies, residential flat buildings to 2 and 3 levels (with higher buildings in certain targeted areas such as Riverwood North and Campsie).

Medium and higher density housing is predominantly found in the rail corridor suburbs north of Canterbury Road, reflecting a long history of up to 50 years of development of flats in these suburbs. Residential flat buildings north of Canterbury Road are also in areas outside and a long walking distance from a railway station.

Conversely there are many locations in the extreme south of the LGA which are close to the East Hills Line, but which are predominantly developed for low density detached dwellings. The prevailing land use zoning prevents many sites in this area from being developed for residential flat buildings.   **Figure 2.6** shows the distribution of the predominant housing types throughout the suburbs with the higher density generally occurring in proximity to train stations.

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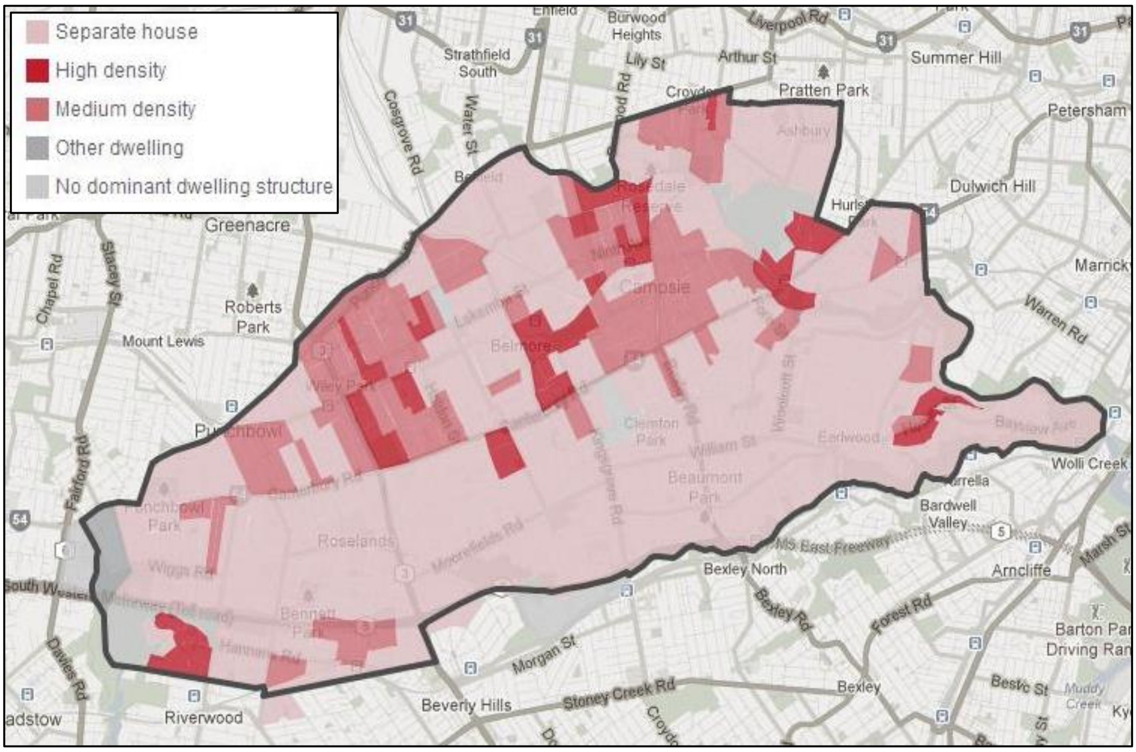


Source: Atlas.id, 2011

Figure 2.6 Dominant dwelling structure in Canterbury LGA

The location of commercial centres, urban infrastructure, key transport corridors and non residential uses provide a framework and place in which the people of Canterbury live. The landholdings of the Department of Housing remain important in addressing social and affordable housing needs in the area. Some of these areas will continue to be important as the community grows. The role of others should be re-examined, particularly if previous uses are redundant or areas require reinvigoration. The following discussion focuses on some key elements of the urban structure which remain important in progressing the consideration of the RDS.

2.3.1 Centres and public transport

In much of Sydney, the convenience of centres and public transport nodes presents a well-recognised opportunity to increase housing densities, thereby maximising the number of people living in close proximity to a full range of services or connections to other areas by mass public transport.

There are a number of local retail centres which are generally situated around the various railway stations in Canterbury LGA including Campsie, Wiley Park, Lakemba and Belmore, which are surrounded by high and medium density residential zones. The two main exceptions are the Roselands Shopping Centre and the local retail centre in Earlwood, which stand alone from any railway station. The correlation between the availability of public transport and the location of the highest density housing forms, while apparent, is not pronounced.

The areas zoned for high density development provide the main opportunity for increasing dwellings in close proximity to the centres and public transport. The capacity of the various centre catchments to provide further high density residential development is discussed in Section 5.3.

Most of the areas zoned for high density housing have sufficient sites and hence opportunity for redevelopment. However, there is scope to consider allowing incentives for greater development potential (floor space ratios) in these areas in instances where significant sites can be amalgamated to achieve superior design outcomes for high density residential apartment buildings.

2.3.2 Road transport corridors

Since at least the middle of the twentieth century, the two strategic vehicle corridors of Canterbury Road (east-west) and King Georges Road (north-south) have affected Canterbury's development.

Canterbury Road was, until the completion of the M5 Motorway, with the Hume Highway the main traffic artery between Sydney CBD and south west Sydney. A mix of commercial and industrial land uses took advantage of this access and established along this corridor. This corridor's role has changed in line with broader economic trends such as the rise of the stand-alone suburban shopping centres and the decentralisation of manufacturing. Along Canterbury Road there is a proliferation of mixed uses (including high density residential) along this corridor.

The Canterbury Road corridor has been subject to planning strategies which, in general terms, have aimed to move the traditional land uses into current zoning controls creating a mixture of residential, commercial / industrial based zonings. Some of these zonings enable a residential component (typically as shop top housing) while others prohibit residential uses. There is also concern over the viability of a proliferation of commercial / industrial tenancies along these roads given difficulties of access and broader trends seeing a number of traditional uses locating in other more convenient locations.

There is scope to consider reviewing the previous planning strategies to remove zoning impediments to redevelopment and enable the market to determine the extent of commercial / industrial and residential uses.

2.3.3 Redundant uses

There are a number of land uses which over time are no longer viable in their current locations. It is important that the planning process recognise uses that have become redundant and consider amending the planning controls to enable an ongoing economic use. The fact that a use is redundant should not automatically mean that rezoning is required, particularly if the investment in buildings on the land are capable of adaption or use by new occupiers and the amenity of surrounding uses is not diminished.

Careful consideration should be given to decisions to change the zoning of redundant uses and, if and where supported, the proposed zoning to ensure amenity impacts are appropriately resolved.

2.3.4 Social and affordable housing

The NSW Department of Housing owns large areas generally located close to public transport for the provision of social and affordable housing. These areas have been developed over a long period and portray a range of housing styles in different condition.

Consideration should be given to reviewing the land use zones to ensure appropriate controls are in place to facilitate redevelopment that maximises the opportunity to provide additional housing and the State Government's investment in the area, particularly where the land meets urban and amenity considerations.

2.4 Types of housing, costs and ownership

Canterbury LGA residents live in 51,239 dwellings comprising a broad mix of dwelling types. Images showing the range of housing styles in Canterbury are included in **Appendix A**. Detailed analysis of the LGA's housing by sub-precincts is also included in **Appendix A**.

There is an even split between detached and attached housing types. Of all the dwellings in Canterbury LGA, 48 percent are either medium density (17,333 dwellings) or high density (7,082 dwellings), compared to 40 percent in Greater Sydney[1]. There are 26,269 separate houses. The trend for higher density living is evident from the data showing that In the 5 years between 2006-07 to 2011-12 there were only 394 houses compared to 1,209 "other dwellings" approved.

Detached dwellings dominate the southern and eastern areas, including the suburbs of Roselands, Kingsgrove, Earlwood and Ashbury. These areas, particularly the eastern areas of Hurlstone Park, Ashbury and Earlwood that are closest to Sydney CBD, also correlate to the most sought-after areas for family households.

Many of the residential flat buildings that exist in the LGA were developed in the 1960s to 1980s period. Many town houses and villas also date from this period. Most of the dwellings have been strata subdivided meaning that their potential for redevelopment and renewal for higher density housing is very low. Two storey residential flat buildings are a feature of many areas. These buildings often have a smaller footprint and have less perceptible impact on the streetscape than 3 storey walk-up flats. Flats higher than 3 storeys are confined to a few locations, most notably Campsie and Riverwood North. However, more development of this type is envisaged at Sunbeam site (Campsie / Clemton Park border), Canterbury and other town centres, and along the Canterbury Road corridor between Wiley Park and Canterbury.

Large areas of the central and south of the LGA are zoned to permit attached forms of housing such as villas and town houses. Despite this, the predominant form of redevelopment that has occurred on these lands, where it has occurred, has been semi-detached or dual occupancy development. The LGA offers many opportunities for lower tier builders. Even where a site satisfies the planning controls for multi-dwelling housing or even apartments, it is not necessarily the case that a site will be developed for medium or high density development. In some cases, the redevelopment of a site containing a small dwelling house will be for a large dwelling house or a dual occupancy.

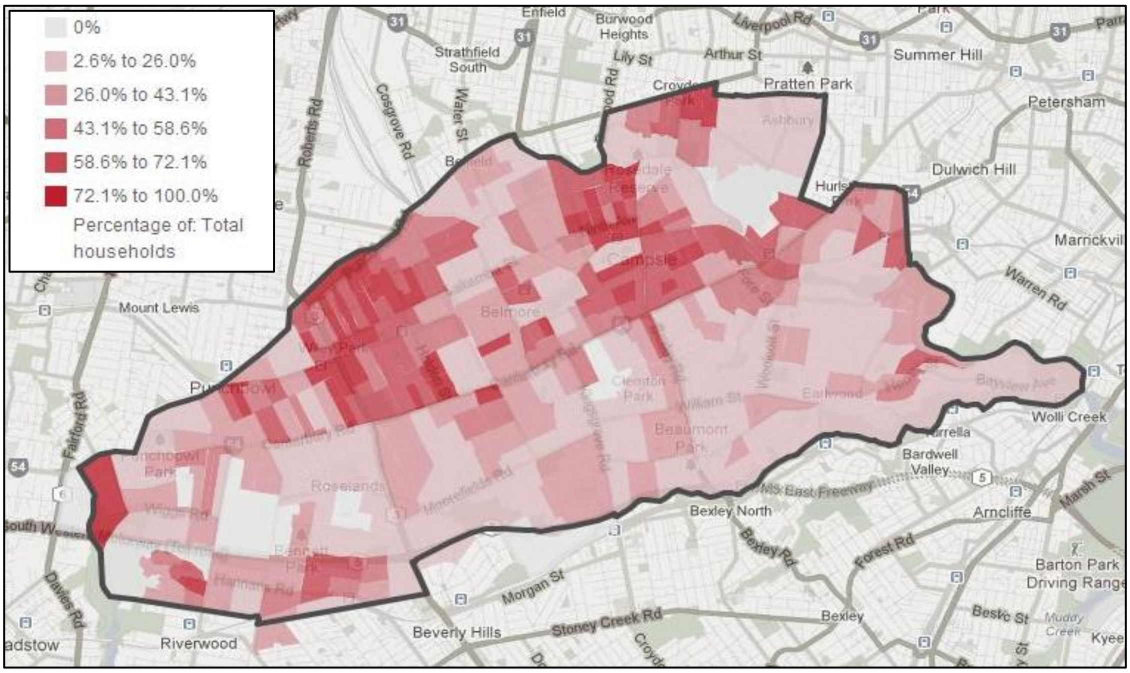
'Knock-down rebuilds' are a feature of the recent housing development in Canterbury LGA. Both new detached houses and semi-detached dual occupancy housing generally have a building bulk which is much greater and an architectural design that is very different than the historic detached housing form it is replacing. It is common to find in many Canterbury streets large new dwellings that have a height and footprint around double that of adjacent older detached dwellings.

2.4.1 Dwelling size

There is unsurprisingly a strong correlation between higher density housing north of Canterbury Road and lower number of bedrooms in a dwelling. Nearly 40 percent of all dwellings in Canterbury have 2 bedrooms, with just over 30 percent having 3 bedrooms, and 4.8 percent having 0 or 1 bedrooms (**Figure 2.7**). Around 45 percent of all dwellings in Canterbury contain

[1] Data provided from profile.id, where 'medium density' includes all semi-detached, row, terrace, townhouses and villa units, plus flats and apartments in blocks of 1 or 2 storeys, and flats attached to houses; 'high density' includes flats and apartments in 3 storey and larger blocks.

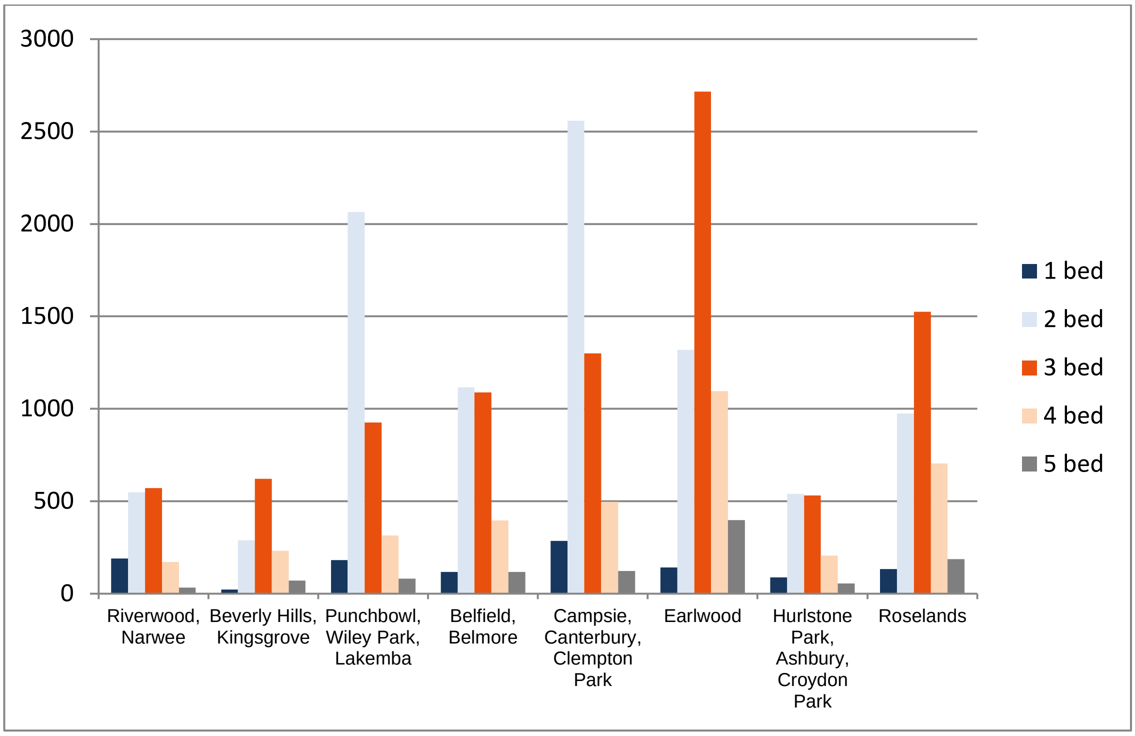
0, 1 or 2 bedrooms (reflecting similar proportions to the amount of medium and high density dwelling stock) compared to 31 percent for the Greater Sydney area.



Source: Atlas.id, 2011

Figure 2.7 Dwellings with two or less bedrooms per household in Canterbury

Figure 2.8 shows dwelling size by sub-precinct. The most common dwelling size accounting for 39.6 percent of the supply is 2 bedrooms dwellings, closely followed by 3 bedroom dwellings which make up 32.5 percent. Earlwood has the most dwellings with 3 bedrooms or more. Suburbs along the Bankstown Line comprise most of the 2 bed dwelling stock.



Source: profile.id data for each suburb which were averaged where there were multiple suburbs

Figure 2.8 Dwelling size by housing sub-precinct

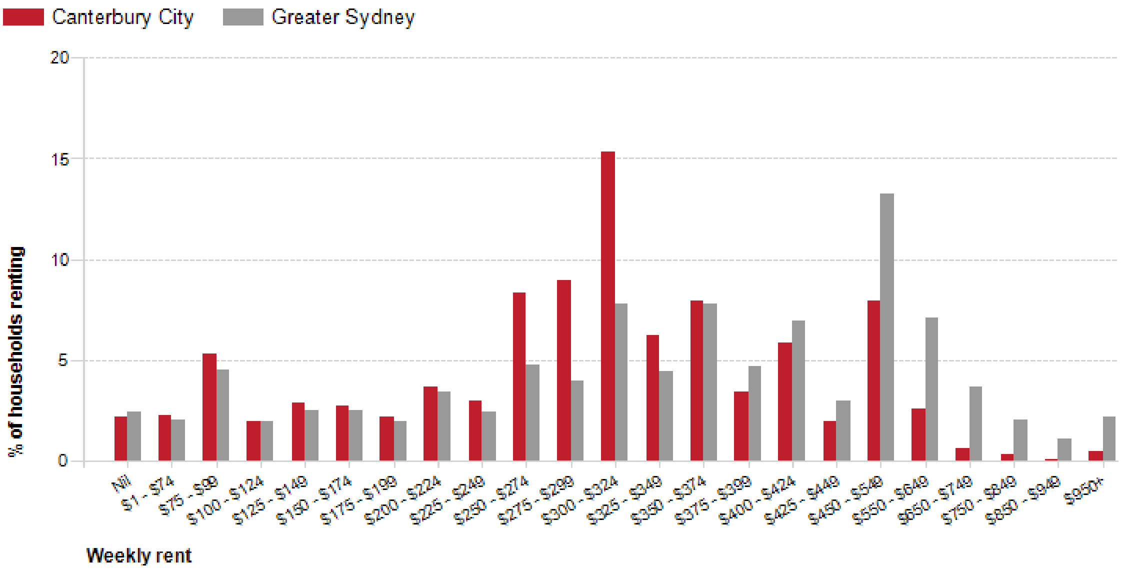
A more detailed summary of the dwelling stock by suburb/ sub-precinct is contained in **Appendix A**.

2.4.2 Housing costs

Canterbury LGA provides some of the most accessible affordable housing in Sydney. **Figure 2.9** shows that Canterbury LGA's rental housing stock is over-represented in all weekly rent classes up to $374 per week, compared to the Greater Sydney average. This is significant given that Canterbury LGA's housing is only around 15 kilometres from the Sydney CBD.

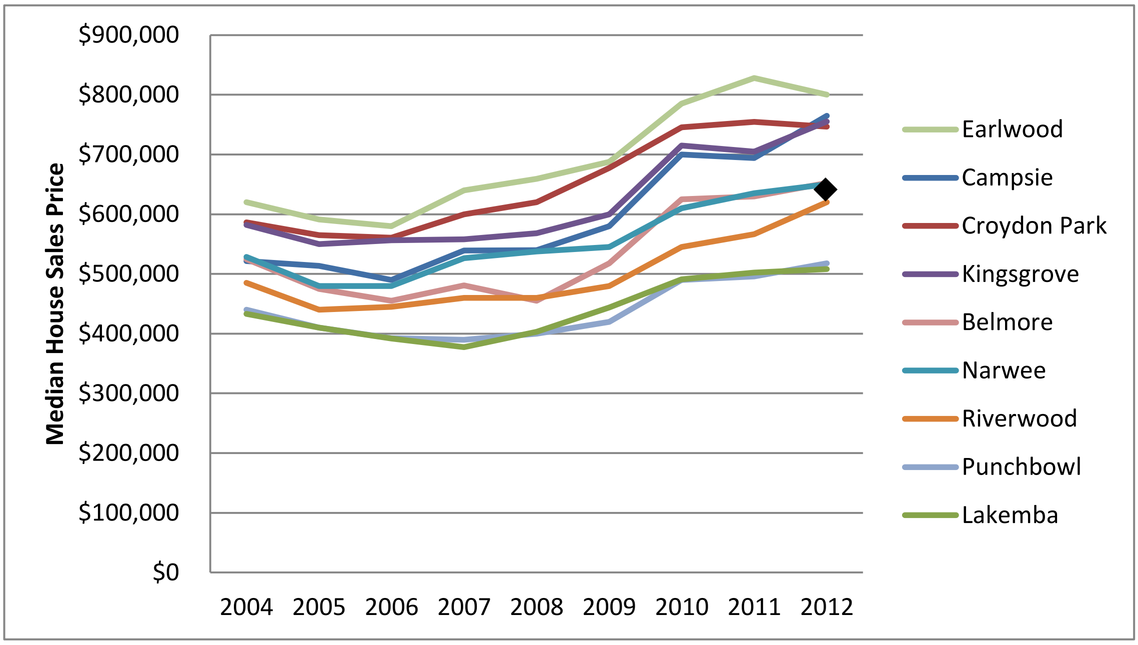
Figures 2.10 and 2.11 show the median house and apartment prices in different suburbs within Canterbury LGA. The more affordable suburbs for all dwelling types are likely to be located in the western areas, further from the Sydney CBD, and along the Bankstown Line corridor, where the travel time by train to central Sydney is around 30 minutes.

The Figures also shows the comparison to the latest median prices for Sydney. The data shows that most of the suburbs in Canterbury LGA have median apartment (unit) prices less than the Sydney median.



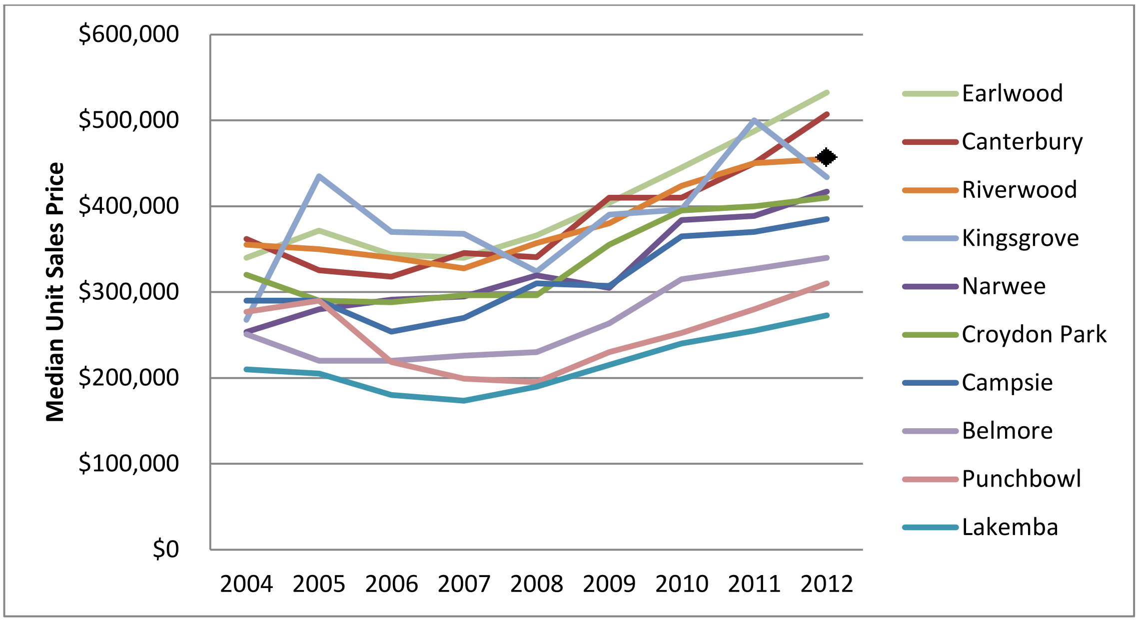
Source: Profile.id, 2011

Figure 2.9 **Comparison of weekly housing rental payments between Canterbury LGA and Greater Sydney**



◆ = Sydney median in 2012; Sources: myRPdata.com; Australian Property Monitors

Figure 2.10 **Median sales prices - Houses**



◆ = Sydney median in 2012; Sources: myRPdata.com; Australian Property Monitors

Figure 2.11 Median sales prices – Units

2.4.3 Home ownership and rental housing

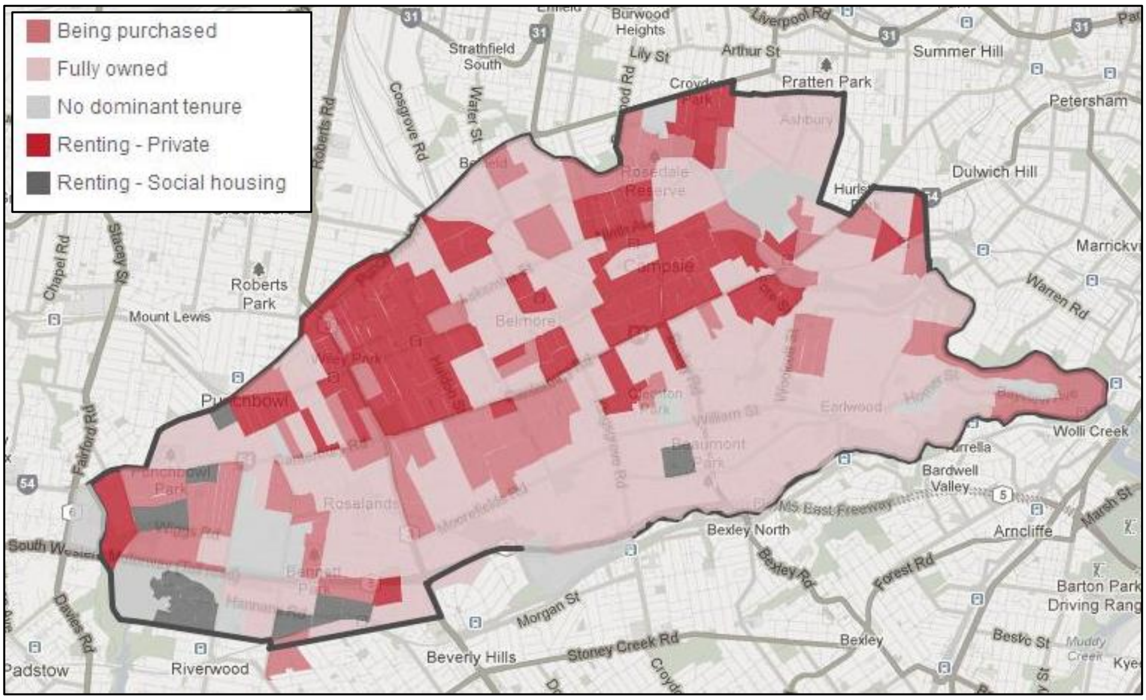
Between 2006 and 2011 there was a decrease in the number of fully owned dwellings in Canterbury LGA; and an increase in persons with a mortgage (1,699 persons), and persons living in private rental (528 persons) and social housing (87 persons). Because of the broad range of housing, the middle ring suburbs also provide a range of what are, in a metropolitan Sydney context, affordable housing options, particularly in medium and higher density developments. Canterbury LGA particularly makes a significant contribution to the supply of accessible lower cost housing in Sydney.

Figure 2.12 shows the predominant housing tenure in the different parts of Canterbury LGA.

In 2011, approximately 56 percent of households were purchasing or fully owned their home, which was less than the Greater Sydney area at 62 percent. It is noted that there has been a decrease in fully owned dwellings, an increase in persons with a mortgage (1,699 persons), and an increase in persons living in private rental (528 persons) and social housing (87 persons).

Canterbury has 5.3 percent vacancy rates in private dwellings compared with Greater Sydney which has a vacancy rate of 6.9 percent suggesting a strong rental and investor market in Canterbury.

Nearly 35 percent of households rent, with 6.4 percent of these renting social housing. The percentage of people renting in Canterbury is 4.5 percent greater than Greater Sydney. Rental housing is focused on the residential flat building areas along the Bankstown Line, while concentrations of owner-occupied and mortgagee housing roughly correlate with the dwelling house suburbs in the south and east. Social housing is focused in several pockets, mainly in Riverwood and Punchbowl.



Source: Atlas.id, 2011

Figure 2.12 Dominant tenure type in Canterbury LGA

2.4.4 Demand for social housing

The LGA accommodates a substantial amount of social housing provided by the NSW Department of Housing (i.e. Housing NSW) and other social housing providers. There are some suburbs in Canterbury LGA where there is a large number of social housing including Narwee (at 18.7 percent) and Riverwood (at 46 percent). Riverwood North contains a particular concentration of these dwellings, with other social housing dwellings dispersed throughout the LGA.

The Department of Housing identifies that the area of Canterbury is classified as a 'high demand' zone for social housing. This area includes the suburbs of Belfield, Belmore, Beverly Hills, Campsie, Canterbury, Clemton Park, Croydon Park, Earlwood, Hurlstone Park, Kingsgrove, Lakemba, Roselands, Undercliffe (not in Canterbury LGA) and Wiley Park. The suburbs of Narwee, Punchbowl, Riverwood and Roselands are grouped under the allocation area of Riverwood and are also classified as a 'high demand' zone for social housing.

The Department's Canterbury and Riverwood allocation areas contain a total of 3,913[2] social housing properties comprised of 1,684 dwellings within Canterbury and 2,229 dwellings within Riverwood. This accounts for just over 10 percent of the Central Sydney Region social housing stock being provided within the Canterbury LGA. **Figure 2.13** identifies the variety in social housing stock by bedroom numbers which shows a higher proportion of 2 bedrooms dwellings in both areas and limited supplies of 4 bedroom dwellings.

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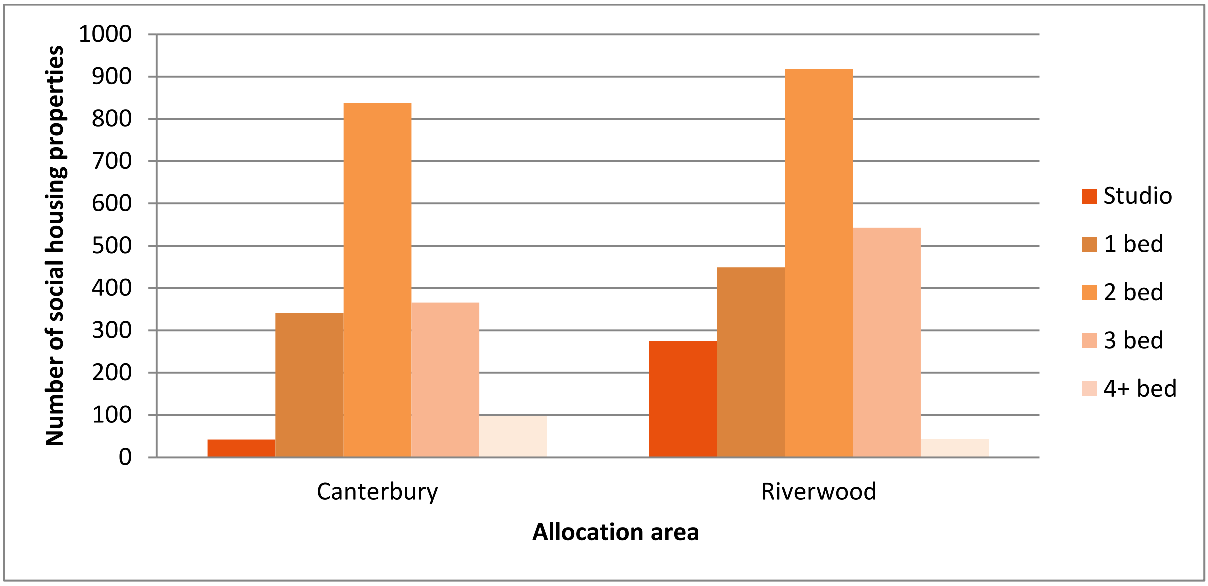
[2] Housing NSW (June 2012) http://www.housingpathways.nsw.gov.au/NR/rdonlyres/EC8EA36E-670B-4C8B-A22F-763D4DB2BD97/0/ExpectedWaitingTimesOverview2012.pdf



Source: Department of Housing (June 2012)

Figure 2.13 Number of social housing properties by bedrooms

Since around 2010 much new construction has occurred, much of it through the Nation Building Program. Given the aged and under-utilisation of some of the Department's landholdings, there is scope for significant redevelopment to meet social housing needs into the future. Department of Housing favours a 2 storey apartment model as this is a better fit with their client's needs, however local zoning provisions are preventing the Department from providing more of this housing product.[3]

2.5 Summary

Understanding the existing community and its housing options is important as a significant percentage of the occupiers of new housing will come from the local area. The demographic profile of the existing community is important in understanding the type and size of future housing required and its position in the marketplace.

Canterbury LGA is a very diverse community. It is made up of a diverse ethnic base and has greater proportion of residents than the Sydney average for young children, people in the household formation years and elderly. It is also an area in which there is a larger proportion of households with a lower income correlating to the higher numbers of affordable accommodation in medium and high density and in the number of dwellings offered by Department of Housing for social housing. At a time where there is increasing concern regarding entry into the housing market, Canterbury remains one of the most affordable LGA for housing in Sydney.

Canterbury has a range of housing types provided in different areas. Approximately half of the dwelling stock is medium or high density dwellings, although these dwelling types are more likely to be concentrated in the northern half of the area. Low density housing predominates in the southern and eastern areas.

The area is well served by railway stations located on 2 rail lines traversing the LGA. Centres including commercial areas and higher density housing has established along some of these,

[3] Apartment buildings are prohibited in the R3 – Medium Density Residential zone which affects much of the Department's portfolio in Canterbury LGA

particularly the Bankstown Line. Other redevelopment opportunities along the Canterbury Road corridor are being realised. There are other land uses and locations that present opportunities now or at some time in the future for redevelopment where they meet strategic planning criteria.

On average, Canterbury LGA dwellings are smaller than the Sydney average. Almost half of all dwellings have 2 bedrooms or less. The smaller dwellings are the dominant housing forms in the suburbs along the Bankstown Line. The dominance of 2 bedroom stock will be important for developers in determining the most successful dwelling mix in new residential developments. Interestingly, the smaller dwelling size has not necessarily translated to smaller households with fewer 1 person households (21.2 percent) and 2 person households (27.8 percent) compared to Greater Sydney (with 22.6 and 30.7 percent respectively). The average household size is 2.83 persons per dwelling which is higher than Greater Sydney of 2.63 persons per dwelling.

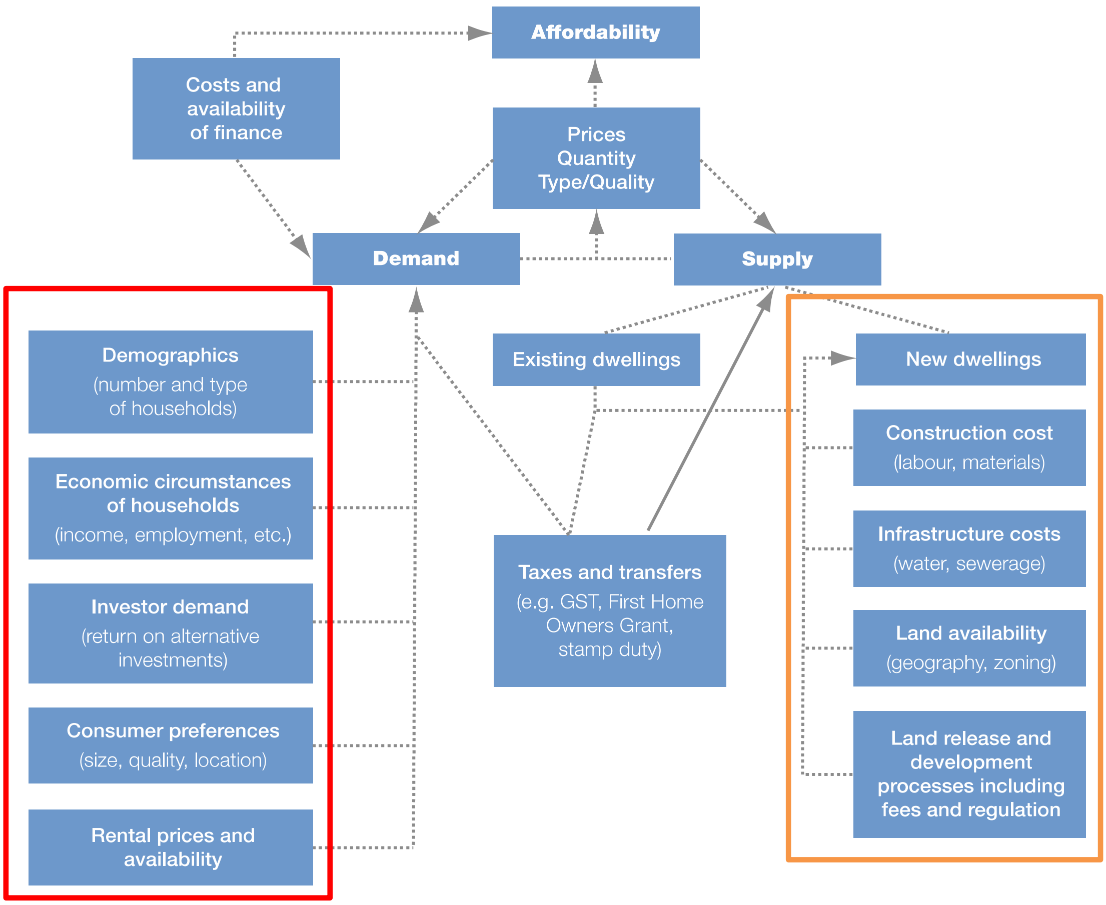
3.0 Housing demand and supply

Having established the profile of the existing community, the RDS needs to focus on opportunities for new housing to meet the existing and future population needs of the area. To do this, the Strategy must bring together:

- The demand for housing to satisfy the needs of the existing population and those that may move to the local government area in the future.
- The supply of existing and potential new housing opportunities that are available and can be viably delivered to meet that demand.

A number and complex interplay of factors influence the demand for and supply of housing in Canterbury LGA.

The *National Housing Supply Council 2nd State of Supply Report* (2010) identifies the key factors that influence housing supply, demand and affordability as extracted from the report in the **Figure 3.1** below. The coloured borders have been added for discussion after the figure.



Source: Adapted from Productivity Commission, *First home ownership: inquiry report*, Productivity Commission Melbourne, 2004, p.5, viewed 25 February 2010, <www.pc.gov.au/projects/inquiry/housing/docs/finalreport>.

Figure 3.1 Factors influencing housing supply, demand and affordability

gln planning
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Figure 3.1 identifies the social, physical and economic factors affecting the supply, demand and affordability of housing and a framework by which developers will assess development opportunities and the economic return to deliver them.

The left hand side of the figure, bordered in red, groups the factors that are social in nature and influence the **market** for new housing in an area. The market will drive the number, dwelling type, size, sales price and sales rates, relying primarily on the profile of people who live in, invest in, or want to move to an area.

The right hand side of the figure bordered in orange, group the factors that are physical in nature and influence the **development opportunities** to deliver new housing in an area. This part of the framework is where councils have traditionally exerted direct influence by zoning land for different types of development, the costs of development (including fees and charges and development (section 94) contributions) and processes for approval. The State Government also applies a variety of taxes or fees to the transfer of land and creation of title. The Commonwealth Government can also apply incentives to encourage particular types of housing, such as affordable rental housing.

The central part of Figure 3.1 contains the factors that must come together into a feasibility to ensure an **economic return** for the developer. As noted previously, the planning system in NSW and indeed much of Australia relies substantively on private developers, rather than public authorities, constructing dwellings to meet the housing needs of the community. The vast majority of new housing constructed will only occur if there is economic incentive for private sector builders and developers to be involved in the process.

It is therefore extremely important for both Council and State Government to understand the key factors that drive supply and demand for new housing and the factors it can influence in planning for the contribution of new housing in an area and Sydney generally.

The *National Housing Supply Council - Key Findings of the 2011 State of Supply Report* (the **National Housing Report**) was a report prepared by the National Housing Supply Council established by the Treasurer and the Minister for Housing in 2008 to both:

- monitor housing demand, supply and affordability in Australia, and
- identify gaps between housing supply and demand and to highlight strain on the housing system.

The following sections of the RDS deal with the two arms of the demand and supply discussion based on the considerations laid out in the National Housing Report. This is a report that examines housing supply nationally. However, the concepts remains relevant to this RDS and, wherever possible, can be applied to aspects of the Canterbury community.

3.1 Housing demand

The National Housing Report identified that the level of underlying housing demand is driven mostly by migration and other demographic factors including number and type of households, the economic circumstances of households, investor demand, consumer preferences and rental prices and availability.

Several of the influences on underlying housing demand have changed over time and are likely to continue to change. The National Housing Report identifies these as being:

- changing international and internal migration levels, with settlement patterns often linked to employment and education opportunities and preferred retirement locations regional differences in housing opportunities, along with mismatches between housing location and labour markets.

- regional differences in housing opportunities, along with mismatches between housing location and labour markets.
- changing patterns of household formation, reflecting trends towards later partnering and becoming parents at an older age.
- people living longer and being healthier, with a marked increase in the number of people aged 65 years and over.[4]

Based on the factors influencing demand nationally, the National Housing Report has identified cumulative additional households required across Australia broken into a low, medium and high growth scenario, as shown in **Table 3.1**.

Table 3.1 Cumulative additional households projected under low, medium– and high-household growth scenarios, June 2010 – June 2030

Year	Scenario		
	Low growth ('000 households)	Medium growth ('000 households)	High growth ('000 households)
2012	279.4	326.8	382.2
2015	700.5	821.5	962.6
2020	1395.2	1,644.2	1934.6
2025	2072.5	2,455.4	2902.0
2030	2,742.0	3,264.9	3692.8

Source: National Housing Report p25

The National Housing Report further distributes the projected growth into regions around Australia. Based on the medium growth scenario, it estimates the housing demand for the Sydney region between 2010 and 2030 is 516,300 additional households. This roughly corresponds to the same projection in the draft *Metropolitan Strategy for Sydney to 2031* which estimates a total of 545,000 dwellings being required by 2031.

It is important to understand how the factors or influences on demand identified nationally may impact on the demand for housing in Canterbury City.

3.1.1 Immigration, migration and housing opportunity

Changes in immigration can fluctuate greatly based on the Commonwealth Government's immigration policy which comprises humanitarian intake, family visa quotas and/or responding to labour shortages.

The National Housing Report assumes that immigration will contribute 180,000 Net Overseas Migration (**NOM**) to Australia per year to the year 2030 to achieve the medium growth assumption. The low growth assumption is 120,000 NOM per year and the high growth scenario is 250,000 NOM per year.

The National Housing Report does not distinguish between the different immigration streams likely to arrive in Sydney (i.e. humanitarian, family reunion or skilled labour). It does, however, note the following regarding family arrivals:

[4] National Housing Supply Council - Key Findings of the 2011 State of Supply Report, pp19-20

…a sizeable share of family migrants are initially dependent on others (such as family or friends) for housing. Skilled and humanitarian migrants, who generally do not have the same connections as family migrants, are less likely to be dependent on others for their initial housing arrangements.

The Deloitte Access Economics study also indicates that, in any one year, about 64 per cent of the number of family arrivals will directly add to the demand for housing in that year. The remaining 36 per cent will initially be dependent on others for housing. At some point over the next five years, about 20 per cent will enter the property market and form a new household. In other words, about 16 per cent of family migrants will arrive as dependants and will continue to be dependent into the future – for example, they may be partners, parents or grandparents who have moved to Australia to live with their family….

…Unsurprisingly, perhaps, about 89 per cent of skilled migrants directly add to housing demand in their first year in Australia.[5]

The National Housing Report attempts to quantify the demand for further dwellings based on immigration by simply dividing the estimated immigrants in one year by the average household size for each visa and dwelling category. The households generated by this method are then distributed where it is estimated that 'about 53 per cent would be flats, owing to the large number of temporary (mostly student) migrants. A further 29 per cent would be houses and 18 per cent would be townhouses.'[6]

Since 1981, the level of immigration to Canterbury LGA has progressively increased, ranging from 1,149 persons per year (averaged between 1981 and 1991) to 2,652 persons per year (averaged between 2006 and 2011). Whilst the categories of immigrant are unknown, the information above confirms the demand for new dwellings will range somewhere between 64 percent (for family arrivals) and 89 percent (for skilled labour and humanitarian arrivals) of the total number in any one year.

Assuming all these were family arrivals, this method would equate to, based on the 2006 and 2011 data, of 600 dwellings per year of which 318 would be flats, 108 would be town houses and the remaining 174 would be houses.

i.e. 2,652 persons / 2.83 occupancy rate x 64 percent family arrivals requiring dwellings

Based on the lowest immigration to Canterbury between 1981 and 1991 of 1,149 persons per year, this method would reduce the demand to about 45 percent of the dwellings listed in the highest immigration period (i.e. to a total of 260 dwellings per year).

Any projection of immigration to Canterbury may well be limited by the supply of available housing in Canterbury LGA. In other words, the total immigration to Canterbury LGA may well have been higher but restricted because of limited housing opportunities in the LGA. If the opportunities are not available immigrants may locate elsewhere or live longer with dependents. The latter may be a factor contributing to the increasing and high occupancy rate in Canterbury.

While immigrants often move to areas to where there is a pre-existing community, their final dwelling location is often dictated by housing affordability. Canterbury continues to provide accommodation which is some of the most affordable in Sydney and a community which is ethnically diverse.

[5] National Housing Report, p40

[6] Ibid.

Any increase in the demand for housing from immigration must be factored against migration patterns between adjoining and nearby LGAs. The 2006 to 2011 census data shows that there was migration from Canterbury LGA of 5,712 persons to other parts of NSW and 1,255 persons to other parts of Australia. Considering both immigration and migration in Canterbury LGA, there was a net overall increase of 4,606 persons within the Census periods or 921 persons per year. Therefore the demand for housing identified from immigration will be substantially reduced by the housing made available from outward migration to about 325 dwellings per year based on the current occupancy rate.

It is noted that new residents have moved to Canterbury LGA from Marrickville LGA (1,886 persons), Ashfield LGA (504 persons) and Sydney LGA (465 persons). These are adjoining or nearby LGAs, large parts of which have similar housing stock, and have good access to public transport, arguably enabling existing social networks and access to employment to be maintained.

The top ranked destinations where people of Canterbury migrated to include the adjoining LGAs of Bankstown (3,239 persons) and Hurstville (700 persons), again revealing movement focussed to nearby areas within the same sub market. About half of this total number of residents (i.e. 1,862 persons) migrated to the more distant LGAs of Liverpool, Blacktown and Campbelltown. This latter grouping of LGAs is more distant, but also offer affordable first home buyer options in both established and greenfield release areas as well as access to a heavy rail public transport system and / or other local employment opportunities.

Migration by age group in 2011 show the greatest net migration from Canterbury are in the 5 - 11 years and 25 - 44 years age cohorts. The 25 to 44 year age groups are the household formation and home building periods in life and hence reflect some demand for households comprising young families to purchase in areas outside Canterbury LGA where they can afford a new house which might be otherwise unaffordable or not available in Canterbury.

3.1.2 Household formation and changing demographics

Demand for housing also comes from the changing household structure and dwelling preferences of the existing population.

The National Housing Report notes that 'the three variables determining growth in the number of households are the rate of population growth, the age-specific rates at which particular age groups form households, and changes in the age structure of the population.'[7]

Population growth between 2006 and 2011 was 7,598 persons. As noted above, the growth attributable to migration (i.e. after considering both immigration and migration in Canterbury) was 4,606 persons. Hence natural growth from the existing population comprises some 2,992 persons.The National Housing Report notes that:

[7] Ibid., p20

> *…in recent decades the rate of growth in the number of households has been considerably greater than the rate of growth in population. Although population growth has been a major factor in the growth of households, its contribution to household growth has declined since 1991–96, and decreased markedly in 1996–2001 to less than half of household growth for the first time in the last three decades. The numbers of households continued to increase at a faster rate than the population from 2001 to 2006. However, recent ABS survey data suggest there has been an increase in household size since the 2006 census and, therefore, a lower rate of growth of households relative to population growth since that time*.[8]

The formation of new households are influenced by a variety of factors including social trends and changing patterns of partnering, interest rates, affordability of housing stock, job security but to name a few. Adult children are staying at home longer and couples are marrying later than previous generations. In turn people are living longer and these, over time, will represent an increasing proportion of households.

The Census data show that while the population of Canterbury LGA increased by 7,598 persons between 2006 and 2011, the number of households increased by 1,423. There were 1,128 dwellings approved in the same period. The growth in households between 2001 and 2006 was 1,138 households.

This increasing household sizes trend noted nationally in the National Housing Report is particularly relevant to Canterbury LGA. The average household size increased from 2.69 persons per household in 2006 to 2.83 persons per dwellings in 2011. In the same period Greater Sydney's average household size only increased from 2.65 to 2.69 persons per dwelling.

The National Housing Report noted that lone person households are:

> *…expected to increase as a share of all households from 26 per cent in 2010 to 32 per cent in 2030. Family households with children are expected to decrease as a proportion of all households from 43 per cent in 2010 to 38 per cent in 2030. Households consisting of couples without children (living in the house) or lone persons are projected to increase as a share of all households more rapidly than are households of families with children in all regions in the next 15 years.*[9]

In the case of Canterbury LGA, the biggest increase in households was couples with children up 1,167 households. However, couples without children increased 525 households, but lone persons decreased by 440 households. Group households increased 137 persons. Interestingly, the largest decrease was in young lone person households (-439 persons), almost offset by young couples without children (434 persons). Older lone person households increased by only 66 dwellings.

The census data confirms that there are higher proportion (some 16 percent) of 2 bedroom dwellings that the Greater Sydney average. Other bedroom numbers are less than the greater Sydney average. The bedroom composition is likely to reflect demand, particularly in medium and higher density housing. Discussions with local developers confirm the clear demand for 2 bedroom product. A review of the sample DA show a small percentage of 3 bedroom product in preference to 1 bedroom product. However, discussions with Australand who are developing the Sunbeam site, confirms a strong market for 1 and 2 bed dwellings and very weak market for 3 bed dwellings.

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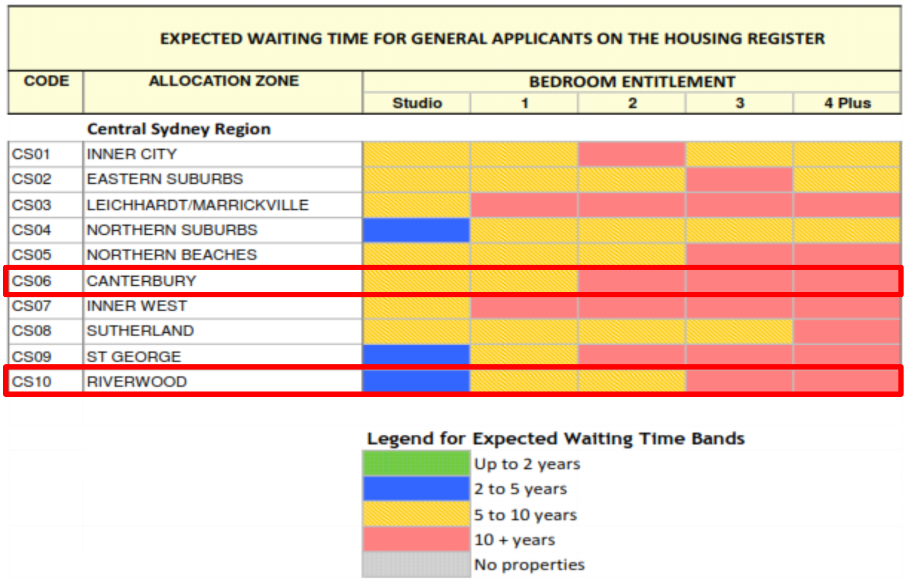
[8] Ibid.

[9] Ibid., p26

3.1.3 Demand for social housing

As noted in Section 2 of this RDS, the LGA accommodates a substantial amount of social housing provided by the Department of Housing and other social housing providers. The Department of Housing is progressively redeveloping properties for 1 and 2 bedroom dwellings.

Due to the high demand for social housing within both Canterbury and Riverwood, there are long waiting lists for general social housing applicants. **Figure 3.2** identifies the current waiting time for general applicants on the housing register for the different allocation zones within the Central Sydney Region. As highlighted within the table below, both 3 and 4 bedroom family type dwellings have a 10+ year waiting time. The Department of Housing identifies that the last date for an applicant housed within a 4 bedroom dwelling in Riverwood was November 2008 with the dwelling stock in Canterbury turning over slightly more frequently.



Source: Housing NSW Family and Community Services

Figure 3.2 Expected waiting time for applicants on the social housing register (June 2012)

The number of applicants on the housing registers as at 30 June 2012 for social housing within Canterbury was 1,036 and within Riverwood were 453. When viewed with the total number of social housing properties these figures identify a strong demand for housing within the Canterbury area which has a significantly larger waiting list and reduced housing stock in comparison to Riverwood.

In May 2010 the Department of Housing gave a presentation to Council which identified that Canterbury LGA will continue to be in the spotlight for social and affordable housing initiatives. This is because:

- Canterbury LGA has relatively higher percentages of low and moderate income earners who are renting and in housing stress. A significant number of these are on Commonwealth Rent Assistance (**CRA**). Vacancy rates remain low and there is a need to increase the supply of affordable housing.
- There is a need for more one bedroom, studio and boarding house style accommodation to assist in meeting the needs of the community through different stages of the housing life cycle and particularly for young people and elderly people on lower incomes. The

Department of Housing has previously identified that the majority of CRA recipients in housing stress in Canterbury are single person households and the declining occupancy rate is another indicator of the need for more one bedroom stock.

- The lack of affordable housing for purchase for low and moderate income earners. While purchase affordability is tight across the whole of Sydney, it is difficult for lower income earners to afford housing in Canterbury and there is a significant (above the metropolitan average) proportion of low and moderate income purchasers in housing stress in Canterbury LGA.
- The *BankWest Key Worker Housing Affordability Report* in May 2008 identified that Canterbury is not affordable for purchase by any of the five key worker groups investigated – nurses, teachers, police officers, fire fighters and ambulance officers.

3.2 Housing supply

To understand housing supply, it is necessary to identify the contributory elements that result in the construction or supply of new dwellings.

In essence these are the same elements a builder will quantify and cost to prepare a development feasibility to assess the viability of the project. In this regard the following section focuses on the factors that may affect the land and dwelling supply pipeline.

The draft *Metropolitan Strategy for Sydney to 2031* estimates a total of 545,000 being required by 2031, with a total of 42,000 of these dwellings being required in the South subregion of Sydney. These targets are likely to represent an increase of more than 80 percent on the targets included in previous metropolitan planning documents. Metropolitan housing targets are discussed in more detail in Section 4.

The Metropolitan Strategy and Subregional Delivery Strategies are the mechanism that the Department of Planning and Infrastructure will use to commence discussions on how to achieve the targets at a local government level to accommodate the planned population, and the Department, after negotiation, will track each local government area's performance against the targets set.

The future (accelerated) supply of housing can only be achieved if there is an economic and planning platform in place that provides opportunity and incentive for the construction industry.

In order to increase the amount of dwellings to meet the new subregional targets then all LGAs will likely need to increase opportunities for housing. It will be important that all LGAs responsibly address this, otherwise shortages in supply can lead to localised price increases, migration or further housing stress.

The following factors, including those identified by the National Housing Report[10] will likely influence housing supply.

- Developer types
- Land prices
- Construction costs (labour, materials)
- Infrastructure costs
- Land availability (geography, zoning, environmental and heritage constraints)
- Land release and development processes (including fees and regulation)

[10] Ibid., pp44-45

- Taxes and transfers
- Availability and cost of development finance.
- Time taken to complete construction.

Each of these factors is discussed below.

3.2.1 Types of developers

The planning controls in Canterbury LGA permit a wide variety of new housing types including dual occupancy, attached dwellings, multi housing dwellings (including townhouses and villas) as well as residential flat buildings ranging up to 8 storeys, and shop top housing in certain mixed use zones.

The mix of development types will need to be delivered by builders with different ranges of expertise capable of bringing different financial resources to the build. Whilst this was not a factor identified in the National Housing Report, the scale of additional housing potentially required will need a cross section of builders with the resources and experience to deliver the different housing types.

The Department of Planning and Infrastructure has been identifying the range of developers active in the Sydney market and has summarised builders and developers into 4 tiers as follows:

- Tier 1 - National or international organisations providing high quality product in specific submarket locations. Value of work: greater than $50 million.
- Tier 2 - National or international organisations and contractors providing medium to high quality product across the Sydney region. Value of work $10 million to $100million.
- Tier 3 - Organisations with the financial capacity to undertake project works up to the value of $15 million.
- Tier 4 – Local contractors undertaking works up to the value of $10 million, e.g. local builder.

At present in Canterbury LGA, there are currently all 4 tiers of developers adding supply to the market, as well as opportunities for residents to manage small scale dual occupancy development.

Tier 1 developers and builders will only be attracted to Canterbury LGA if large sites are available for development. This would typically only be created by a significant rezoning of un-fragmented land, such as the former Sunbeam site in Campsie that was rezoned under the former Part 3A process and which is currently being developed by Australand. These opportunities only occur as part of significant site-specific rezonings and provide an injection of supply into the local market while the development occurs.

Tier 2 builders will target smaller rezoned sites or well-located areas targeted for redevelopment typically for apartments or developments above 100 dwellings. These developers will be active in major redevelopment areas such as Canterbury town centre.

Tier 3 builders will typically target larger infill development sites sometimes requiring consolidation to construct larger sized development sometimes incorporating mixed use components.

Tier 4 builders will target smaller infill development sites which often require consolidation of 2 or 3 parcels. These builders tend to be local, operating in a subregion where the market is relatively consistent.

3.2.2 Land prices

Variations in land prices will impact on the ability of developers to secure sites for development. These can be a function of supply and demand of land remaining in a development zone or reflect broader trends including gentrification in the region and dwelling preferences based on cost and/or location near work or public transport.

At the local level, land prices within development areas can escalate, typically reflecting the reducing opportunities to secure the remaining sites in an area. The premium paid to a land owner to secure a parcel will, in general terms, increase if there are no other, or limited opportunities for developers to secure other parcels in an area. If a land use zone has an abundant of opportunities then developers can work the area to consolidate parcels or move onto others if owners expectations are too high.

In Canterbury LGA there are large areas zoned for multi dwelling housing with ample capacity meaning there are good opportunities to consolidate parcels for a redevelopment site (i.e. in the R3 zone). There are some areas zoned for apartments where the opportunities are more constrained and some zones where there is little potential remaining (i.e. in the R4 zone). In these areas a higher premium would be expected to be paid by developers to secure the remaining sites, but only to a level where the project remains viable. This would typically mean that the dwelling prices in that location have also risen or the land will not be purchased and will remain undeveloped until a price adjustment occurs or owners expectations adjust to the market.

Land prices will impact on the conversion of opportunities for new development and hence supply of new dwellings. A review of sample development applications in Canterbury LGA over the last few years indicates that land prices to secure a development parcels are not significantly higher than average house prices, particularly in the R3 zone. There have been higher premiums paid for some land in the R4 zones.

Developers will also watch closely the price differential between apartments, townhouses and traditional cottages as a means to gauge likely demand for types of dwelling in the market place. Generally a zone which is approaching 70 percent complete will enable opportunities to be identified and consolidations occur without substantial premium. At or above 70 percent there may be a greater premium or finding willing owners to consolidate properties for development will become more difficult and supply in these areas will start to slow or even stall.

To date, the land supply does not seem to be a major issue with a number of projects under construction and a number of consents in place that have not yet been commenced, although, as noted below, some of these may be speculative to bank given recent changes to the planning controls.

3.2.3 Construction activity

Construction activity is a reflection of the health of the industry to convert opportunities to new dwellings by building. Construction activity is influenced by a range of factors including opportunities for redevelopment, access to finance, market conditions and access to labour and materials.

In general terms, housing creation in Canterbury LGA has generally met its annualised dwelling targets, producing some 243 dwellings per year. Council also has approved a number of developments that have not yet proceeded to the construction stage. In part some of these may be speculative, particularly to preserve a consent before operation of new controls under Canterbury LEP 2012. Performance against housing targets is discussed in detail in Section 5.2.

Council has tracked development consents that have been granted but that have not yet been commenced. These consents, which typically have a 5 year horizon for commencement, are shown in **Table 3.2**. Council has also tracked developments under construction, which are shown in **Table 3.3**.

Table 3.2 Dwelling approvals not yet commenced

	Net additional dwellings (No. of consents)					
	Dual Occupancy	Dwellings on Vacant Land	Multi dwelling housing	Residential flat buildings	Shop top housing / mixed use	Secondary Dwellings
2008	0	1 (1)	8 (3)	0	124 (2)	0
2009	3 (3)	0	18 (3)	0	65 (3)	0
2010	7 (7)	0	21 (3)	0	13 (2)	7 (7)
2011	9 (9)	0	43 (8)	104 (5)*	18 (1)	6 (6)
2012	21 (20)	2 (2)	42 (9)	518 (11)*	242 (8)	23 (23)
Total	**40 (39)**	**3 (3)**	**132 (26)**	**622 (15)**	**462 (16)**	**36 (36)**

Source: Canterbury City Council
As at 1 January 2013
* Includes a Boarding House and/or a Group Home

Table 3.3 Dwellings under construction

	Net additional dwellings (No. of consents)					
	Dual Occupancy	Dwellings on Vacant Land	Multi dwelling housing	Residential flat buildings	Shop top housing / mixed use	Secondary Dwellings
Dwellings under construction	32 (30)	11 (1)	70 (14)	237 (8)	206 (4)	16(16)

Source: Canterbury City Council
As at 1 January 2013

At present in Canterbury LGA, all 4 tiers of builders are developing residential buildings within various areas of the LGA, indicating reasonable access to labour and materials for the construction process.

The costs of construction have been ascertained by reviewing development applications submitted as well as discussions with builders, reference to quantity surveyors' reports and Rawlinsons Construction Handbook.

Generally construction costs for townhouse and villa house construction is generally around $1,350 to $1,450 per square metre. Construction costs for residential flat buildings of 2 or 3 storeys is generally around $1,550 to $1,650 per square metre. Residential flat buildings of 4 to 6 storeys or more are around $2,000 per square metre. Any basement parking costs are $30,000 to $40,000 per space. These costs include fencing and hard and soft landscaping.

3.2.4 Infrastructure costs

New developments in Canterbury LGA are primarily infill development opportunities. Hence infrastructure costs are relatively minor in comparison to greenfield release areas where new service infrastructure is required for development to occur.

In general, new developments will be able to access water and sewerage infrastructure and other utility services. Electricity may be required to be augmented by provision of new pad mount substations for some developments, particularly apartment buildings.

Other infrastructure costs are required through the payment of local development contributions under section 94 of the Environmental Planning and Assessment Act. These contributions are payable based on the number of bedrooms per dwelling in a new development and are applied towards the provision of additional facilities required by the incoming population. The facilities include open space acquisition and embellishment, community facilities, environmental amenity improvements and traffic infrastructure.

The current section 94 contributions applied by Council are shown in **Table 3.4**.

Table 3.4 Section 94 contributions for residential development

Section 94	Size of dwelling	No of bedrooms	Contribution
Large Dwelling	>90m^2	> 2 bed	$18,120
Medium Dwelling	60 - 90m^2	2 bed	$13,156
Small Dwelling	< 60m^2	1 bed	$8,426

Source: *Canterbury Development Contributions Plan 2005*

It is important to benchmark the infrastructure costs applicable for new development against those that may apply elsewhere in the subregion as comparatively high costs in some areas may shift development activity to others with a lesser cost.

3.2.5 Land availability

An assessment of the theoretical capacity for the further residential development in Canterbury LGA is described in Section 5.3.

3.2.6 Land release and development process

Canterbury LGA currently has infill redevelopment opportunities to create new housing under its existing planning controls (as described in Section 4.2).

Changes to the planning controls have occurred over time by either rezoning other urban land uses (typically industrial) for residential development or by expanding existing zonings or development controls to increase yield.

Rezonings have occurred by either:

- 'spot rezonings' supported and executed by Council and in some cases the Department of Planning and Infrastructure, which can take 6 to 12 months; or
- as a result of reviews of the existing instrument or other planning strategy, which may take up to 2 years.

In terms of the time taken for granting consent for development permissible under the planning controls, Council appears to deal with development proposals relatively expeditiously. From reviewing a range of applications for different types of residential development, Council's assessment times for town houses and residential flat buildings typically range from 5 to 8 months, including requests for further information. Dual occupancies and other smaller scale development are processed more quickly.

3.2.7 Taxes, transfers and other development incentives

In purchasing a development site, builders will have to pay the State Government imposed stamp duty on the transaction calculated as follows.

For individual sites purchased at a value of:

$300,001 to $1 million:	$8,990 plus $4.50 for every $100 or part, by which the dutiable value exceeds $300,000
Over $1 million:	$40,490 plus $5.50 for every $100 or part, by which the dutiable value exceeds $1,000,000
Over $3 million:	$150,490 plus $7 for every $100 above $3M

The builder / developer will also be required to pay standard residential rates for each property from acquisition to strata subdivision of the completed product and sale.

There are separate incentives for those developers constructing affordable housing that qualifies for funding under the National Rental Affordability Scheme (**NRAS**). NRAS is a $4.3 billion Commonwealth Government initiative to stimulate the supply of new affordable rental dwellings in partnership with the States and Territories. NRAS aims to increase the supply of affordable housing in Australia by providing annual incentives (as cash, tax offsets or in-kind assistance) to approved participants for a period of 10 years to create new affordable rental properties for low and moderate income households, with rents at 20 per cent or more below the market rate.

The National Housing Report notes that:

> *…investor interest and engagement has been growing. As at 30 September 2011, 4,604 dwellings have been built and are now tenanted or available for rent. Many more are in development and, following the announcements of successful applications from the fourth call for proposals, substantial progress has been made towards achieving the Australian Government's target of 50,000 new affordable rental dwellings – 35,000 dwellings by 30 June 2014 and a further 15,000 dwellings by the end of 2015–16.* [11]

The State Government has gazetted *State Environmental Planning Policy (Affordable Rental Housing) 2009* (**Affordable Rental Housing SEPP**). This allows for greater floor space and reduced car parking to be delivered in developments offering a component of affordable rental housing for a period of 10 years in public transport-accessible locations. Council has recorded that there has been an increase in applications for affordable housing projects in Canterbury LGA since this policy was gazetted in July 2009, as shown in **Table 3.5**.

[11] Ibid., p77

Table 3.5 Developments under the Affordable Rental Housing SEPP

	Net additional dwellings (No. of consents)		
Development	**Residential flat building**	**Multi dwelling housing**	**Other development types ***
Approved (not yet constructed)	116 (6)	39 (7)	111 (42)
Under Construction^	61 (4)	25 (3)	29 (29)
Completed	25 (1)	257 (30#)	89 (51)
TOTAL	**202 (11)**	**321 (40)**	**237 (130)**

* 'other development types' include secondary dwellings, boarding houses and group homes. There were no dual occupancy developments noted within the data as being approved and constructed under the ARH SEPP.

^ As at 1 January 2013

Includes Housing NSW applications approved in 2010 and onwards assumed to be submitted under the ARH SEPP.

3.2.8 Availability and cost of finance

Since the Global Financial Crisis there has been a marked changed to accessing finance for development projects. Banks are now requiring that preconditions are met before releasing funds for development.

The two main requirements are:

- Pre-sale targets typically around 60 percent.
- Greater equity requirements with a Loan to Value Ratio (**LVR**) typically of 70 percent.

For builders and developers the LVR is the amount that can be borrowed against the value of the 'as if complete' development. Typically credit facilities would be granted for loans of over $250,000 up to 70 percent of the 'as if complete' value of the project.

The LVR and hence loan amount may sometimes vary up or down based on the location of the property, credit history and the type of loan. The typically LVR assumed for projects in Canterbury LGA is 70 percent.

Interest on development projects currently ranges from 6 to 6.5 percent depending on the assessed risk of the proposal by the lender.

3.2.9 Time taken to complete construction

The time taken to complete construction in Canterbury LGA varies based on the specific development types including town houses, low scale and high rise residential flat buildings.

From discussions with builders and review of a sample of development projects the typical time taken to construct projects are:

- 6 to 9 months for a townhouse development in R3 zone
- 9 to 12 months for townhouses in an R4 zone (reflecting the requirement for basement car parking to be provided)
- 12 to 15 months for residential flat buildings up to 3 levels in R4 zones
- 20 to 24 months for apartment buildings above 3 levels in the R4 zone

It typically takes another 3 to 5 months for settlements to occur after completion or occupation certificate.

3.3 Summary

The demand for and supply of housing is influenced by a number and complex interplay of factors. The relative balance of all factors determines the state of the housing market in a particular area.

Demand side matters include changing demographics, household characteristics, investor presence, and land costs / rents. Supply side matters include new dwellings, construction costs, infrastructure costs, land availability, and planning regulation. Councils have a traditional role in affecting the supply side. The relationship between demand and supply is significantly influenced by the existing dwelling stock, the level of affordability, taxes and transfers, and availability of finance. These linking factors affect the economic return for developers.

The following summarises housing demand:

- The Canterbury LGA in general terms provides a range of affordable dwellings for a range of community groups, including new migrants to the country. At the national level, annual migration intakes directly add to the demand for housing. This demand filters down to local areas, particularly areas in the major metropolitan centres. Canterbury LGA – a highly multicultural urban community – is a major receiving area for new migrants. Depending on the stage of the intake cycle, the local demand for housing generated by migrants may be between 260 and 600 dwellings per annum.
- Local migration into the area is primarily from LGAs to the east. Migration out of the area went to adjoining LGAs as well as to more distant LGAs of Blacktown, Liverpool and Campbelltown.
- Population growth in the area has remained relatively consistent, primarily driven by immigration based on its social mix of the existing population and its relative housing affordability and good access to public transport. After a period of static or declining resident population, the population of Canterbury LGA is now rising again, suggesting a continuing demand for more housing. The demand for all household types has increased, with the exception of lone person households. Average household sizes, after a long period of decline, are increasing.
- The number of one and two person households in the area is around the Sydney average. Households comprising 3 or more persons exceed the Sydney average, and the numbers of these larger households have been increasing in recent years. The number of couples with children households has also increased significantly, while lone person households have declined. These results may reflect cultural factors where new immigrants will live with dependents, acceptance of extended families, or affordability factors.
- The Canterbury LGA has more people renting their dwelling than the Sydney average. Dwelling vacancy is relatively low, which will ensure a continuing investor presence in the market. Canterbury's residents have lower incomes, on average, compared to Greater Sydney residents. Canterbury LGA provides some of the most accessible affordable housing in Sydney, particularly in terms of medium and high density dwellings. Despite its relative affordability in a metropolitan context, the area has been identified as having a high number of households suffering housing stress and / or on rental assistance.

The following summarises housing supply:

- The planning controls in Canterbury LGA permit a wide variety of new housing types. Currently, all types of developers / builders are adding to the housing supply, as well as residents. All 4 tiers of builders are developing residential buildings within various areas of the LGA, indicating reasonable access to labour and materials for the construction process.

- There are large areas zoned for multi dwelling housing with ample capacity meaning there are good opportunities to consolidate parcels for a redevelopment site, particularly in the R3 zone. A higher premium would be expected for assembly of development sites in areas where opportunities are more constrained. Land supply does not seem to be a major issue in Canterbury LGA, with a number of projects under construction and a number of consents in place that have not yet been commenced.
- After a subdued period following the GFC, construction activity is increasing again. Over 500 dwellings are currently under construction. Construction times vary from 6-9 months for townhouse development, to up to 24 months for high rise apartments. Since the GFC, there has been a marked changed to accessing finance for development projects. Developers are commonly required to have 60 percent pre-sales, and an equity requirement (LVR) of 70 percent.
- Construction costs are likely to be around the Sydney metropolitan average. Infrastructure to service developments is generally available. Council's assessment times for town houses and residential flat buildings typically range from 5 to 8 months, including requests for further information. Dual occupancies and other smaller scale development are processed more quickly. While these processing times are relatively good when compared to nearby areas, any improvement in processing times would improve developer margins and confidence, and therefore increase development activity.
- As discussed in Section 2.2, there is a higher proportion (some 16 percent) of 2 bedroom dwellings than the Sydney average. Other bedroom numbers are less than the Sydney average. The bedroom composition is likely to reflect demand, particularly in medium and higher density housing.
- Discussions with local developers confirm the clear demand for 2 bedroom product. A review of the sample development applications show a small percentage of 3 bedroom product in preference to 1 bedroom product. However, discussions with a Tier 1 developer (Australand) who are developing the Sunbeam site, confirms a strong market for 1 and 2 bed dwellings and a very weak market for 3 bed dwellings.
- The current Residential and Business DCP controls require a range in housing choice. It is reasonable for these provisions to be retained to provide for variety in dwelling types without being too specific as this will enable flexibility to accommodate the demand in the market at the time of the proposed development.

4.0 Canterbury's housing planning platform

4.1 Metropolitan Strategy

The NSW Government sets out the objectives for each LGA either within a Regional Strategy for councils outside of the Sydney Region, or within the Sydney Metropolitan Strategy for councils located within the Sydney Region.

4.1.1 Current housing targets

The most recent adopted Metropolitan Strategy is the *Metropolitan Plan for Sydney 2036* published in December 2010 (the **2010 Metro Strategy**). However, the prior strategy and subregional strategies remain relevant when discussing housing targets.

The 2010 Metro Strategy identifies ten (10) subregions including the South subregion of Sydney. Canterbury LGA is located within the South subregion of Sydney. The South subregion is comprised of Canterbury, Hurstville, Kogarah, Marrickville, Rockdale and Sutherland Council's. Canterbury LGA has the second largest population in the South subregion and is the second most densely populated LGA behind Marrickville.

A draft South Subregional Strategy was prepared in 2007. The South Subregional Strategy identified a housing target of 35,000 net additional dwellings between 2004 and 2031 (a 27 year period). Canterbury LGA's share of this target was 7,100 dwellings. Only Rockdale (7,000) and Sutherland (10,100) had comparable or greater dwelling targets in the subregion. The target translates to 1,296 dwellings per annum for the South subregion and 263 dwellings per annum for the Canterbury LGA.

The draft South Subregional Strategy has never been finalised.

The 2010 Metro Strategy updated the housing targets for each Sydney subregions, but did not update the LGA targets within each subregion. The 2010 adjusted targets for each subregion are shown in **Figure 4.1** from page 115 of the Strategy. The South subregion target was revised up from 35,000 to 58,000 for the period 2006-2036 (a 30 year period), which translates to 1,933 dwellings per annum.

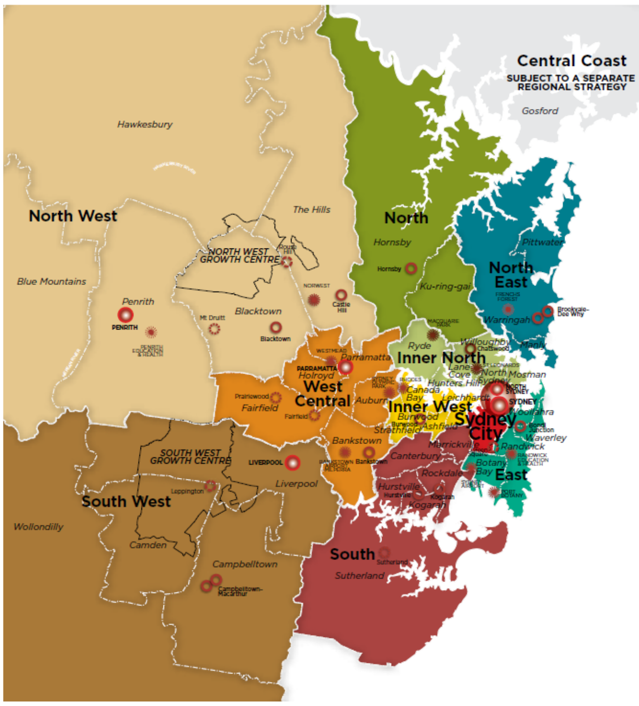
SUBREGIONAL NET ADDITIONAL DWELLING TARGETS

SUBREGION	NEW 2006–2036 DWELLING TARGET
SYDNEY CITY	61,000
EAST	23,000
SOUTH	58,000
INNER WEST	35,000
INNER NORTH	44,000
NORTH	29,000
NORTH EAST	29,000
WEST CENTRAL	96,000
NORTH WEST	169,000 inc. 87,000 in new release areas
SOUTH WEST	155,000 inc. 83,000 in new release areas
CENTRAL COAST*	70,000 inc. 29,000 in greenfield areas
TOTAL	**769,000**

NOTE NEW RELEASE AREA FIGURES INCLUDE BOTH GROWTH CENTRES AND OTHER GREENFIELD RELEASES IN THE SUBREGION. A SMALL AMOUNT OF GREENFIELD DEVELOPMENT ALSO OCCURS IN THE NORTH EAST SUBREGION (NOT INCLUDED HERE).

*THE CENTRAL COAST IS SUBJECT TO A SEPARATE REGIONAL STRATEGY. DWELLING TARGETS ARE FOR THE COMBINED GREENFIELD AND EXISTING URBAN AREA.

SYDNEY'S SUBREGIONS AND LOCAL GOVERNMENT AREAS



Source: Metropolitan Plan for Sydney 2036, p115

Figure 4.1 2010 Metro Strategy and housing targets by subregion

The 2010 Metro Strategy stated in relation to targets:

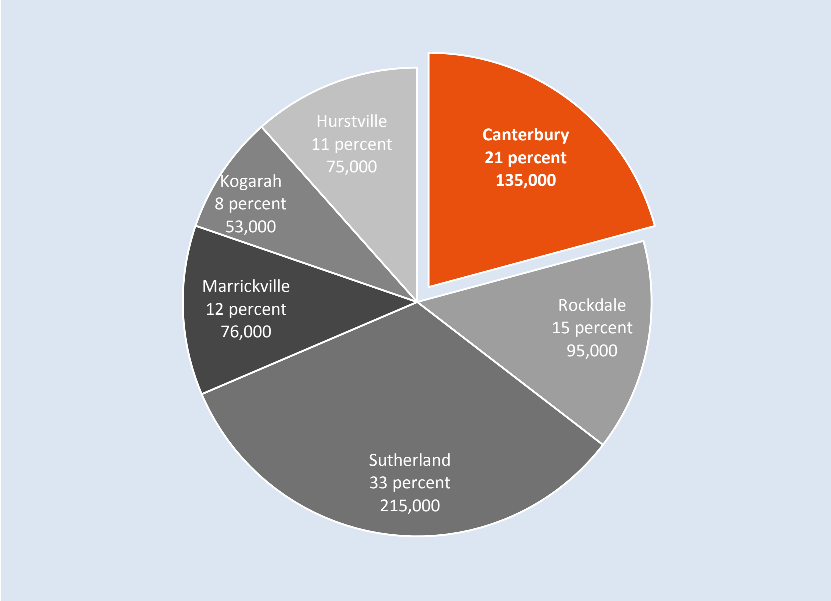
> *This Metropolitan Plan updates subregional housing targets, moving the timeframe to 2036 … Revised subregional strategies will include updated Local Government Area targets….All councils will incorporate the Plan's targets and strategic directions into their LEPs at the first opportunity. These targets represent a minimum and councils are encouraged to plan for higher capacity where appropriate.*[12]

Despite statements made in the 2010 Metro Strategy, the draft subregional strategies have not so far been revised.

Under the Draft South Subregional Strategy, Canterbury LGA has been identified to provide 7,100 dwellings between 2004 and 2031.

Figure 4.2 shows the relative shares of population by each of the South subregion LGAs.

[12] Metropolitan Plan for Sydney 2036, p114



Source: NSW Department of Planning Draft South Subregion Strategy

Figure 4.2 Draft South Subregion Strategy LGAs by population (2006)

4.1.2 Draft subregional targets

At the time of preparing this RDS the State Government had made available for public comment its *Draft Metropolitan Strategy for Sydney to 2031* (**Draft Metro Strategy**).

The Draft Metro Strategy again identifies housing targets at the subregional level, with 42,000 net additional dwellings proposed for the South subregion between 2011 and 2031 (a 20 year period). The strategy also describes an interim 10 year target of 22,000 extra dwellings by 2022.

The longer term target translates to 2,100 dwellings per annum for the South subregion – a subregion that now excludes Marrickville LGA. The Draft Metro Strategy has not however identified specific LGA housing targets.

The subregional strategy / metropolitan strategy targets, based on the Marrickville being excluded from the current subregion, have therefore evolved as follows:

- 2007 Draft Subregional Strategy: 30,850 dwellings over 27 years (equivalent to 1,143 dwellings per annum)
- 2010 Metro Strategy: 51,040 dwellings[13] over 30 years (equivalent to 1,701 dwellings per annum)
- 2013 Draft Metro Strategy: 42,000 dwellings over 20 years (equivalent to 2,100 dwellings per annum)

In summary, the most recent State Government dwelling target for the Canterbury LGA was for 7,100 dwellings between 2004 and 2031, equivalent to 263 dwellings per annum. This LGA target comprised part of a South subregion target of 30,850 dwellings. Since 2007, the Government's goal for housing creation in the South subregion has increased from 1,143 to 2,100 dwellings per annum – an increase of 84 percent. If this is applied proportionally to Canterbury LGA the local housing target would be 483 dwellings per annum.

[13] Assumes 12% of the South subregion's dwelling target was attributable to Marrickville LGA, reflecting that LGA's share of the 2007 Draft Subregional Strategy's targets

Based on the above it is reasonable to assume that the forthcoming Subregional Delivery Plan for the South subregion will include higher housing targets for all LGAs including Canterbury.

4.1.3 Draft Metro Strategy key directions

The Draft Metro Strategy will inform future residential policy. The following outlines the key directions that will inform evolving policy, including any adjustment to the current housing targets.

This Draft Metro Strategy lays the 'strategic planning foundation' for all Sydney councils, providing the basis for regional delivery of the State Plan (*NSW 2021*), *NSW Long Term Transport Master Plan* and the *State Infrastructure Strategy*.

The focus of the strategy is on boosting housing and jobs growth across all of Sydney. Various strategies and actions underpin this goal, the key being the establishment of revised subregional dwelling and jobs targets.

The sustainable growth of Sydney to 2031 is to be built around achieving five key outcomes for Sydney:

- balanced growth
- a liveable city
- productivity and prosperity
- healthy and resilient environment
- accessibility and connectivity.

Balanced growth and liveable city

Key directions and policies related to 'balanced growth':

- Housing renewals and developments will reflect market demand, development feasibility and infrastructure, transport and services provisions
- Increases in housing and employment will be encouraged in transport accessible centres and where existing infrastructure like schools are underutilised.
- Plan for housing growth in centres of all sizes.
- Mixed use development will be encouraged in all centres, including central commercial core areas, where there is market demand and complementary land uses.
- Align subregional and local planning with the Long Term Transport Master Plan[14]

Key directions and policies related to 'a liveable city':

- Areas of new housing must be supported by transport networks, social infrastructure like schools and open space to allow active, successful communities to flourish.
- Minimum housing targets for each subregion to be delivered through new Subregional Delivery Plans.
- New housing will be encouraged in areas close to existing and planned infrastructure in both infill and greenfield areas.
- Infrastructure will be delivered to support housing growth.

[14] Pp10-17

- Deliver a mix of well-designed housing that meets the needs of Sydney's population.
- Deliver well-designed and active centres that attract investment and growth.
- Most new medium and high density housing will be encouraged within a five or 10 minute walk of existing and new centres, but additional housing will be needed elsewhere, ideally in locations accessible to jobs, services and amenities.[15]

Productivity and prosperity

Key directions and policies related to 'productivity and prosperity':

- Jobs growth of 43,000 in the South subregion up to 2031 (24,000 by 2021)
- Provide a well-located supply of industrial lands

The Draft Metro Strategy identifies the importance of industrial lands:

> *Industrial lands close to rail, motorways, other major roads, or ports, airports and intermodal terminals have high strategic value, as do those within larger, regionally significant industrial precincts or that support existing or emerging industry clusters.*
>
> *Industrial lands provide the space enterprises and activities need to operate economically without being restricted by sensitive land uses. Providing a relatively unconstrained operating environment is more important than the number of jobs on a specific site. It has the potential to attract infrastructure and other industrial uses and activities to enhance freight and logistics efficiencies and allow for expansion*.[16]

The Draft Metro Strategy identifies that existing industrial lands are under threat for rezoning to other activities, despite there being a need for them in the future. To provide a framework to assess rezoning proposals involving industrial land, the Strategy states that proposals to rezone existing industrial lands must be consistent with the Industrial Lands Strategic Assessment Checklist. That is:

- Is the proposed rezoning consistent with State and/or council strategies on the future role of industrial lands?
- Is the site:
  - near or within direct access to key economic infrastructure?
  - contributing to a significant industry cluster?
- How would the proposed rezoning impact the industrial land stocks in the subregion or region and the ability to meet future demand for industrial land activity?
- How would the proposed rezoning impact on the achievement of the subregion/region and LGA employment capacity targets and employment objectives?
- Is there a compelling argument that the industrial land cannot be used for an industrial purpose now or in the foreseeable future and what opportunities may exist to redevelop the land to support new forms of industrial land uses such as high-tech or creative industries?
- Is the site critical to meeting the need for land for an alternative purpose identified in other NSW Government or endorsed council planning strategies?[17]

[15] Pp28-32

[16] P48

[17] p49

Accessibility and connectivity

Key directions and policies related to 'accessibility and connectivity':

- Increase opportunities for new housing and employment in areas close to existing or planned public transport.
- Encourage growth in transport accessible centres on Sydney's Strategic Transit Network, as planned for in the *NSW Long Term Transport Master Plan*.
- Development in cross-city transport corridors with potential for urban renewal will enhance accessibility.
- As the number of people living and working in centres grows, we must balance the desire for quiet streets with the needs of the freight industry.
- Use statutory plans to protect and encourage urban renewal and development from:
    - Parramatta to Macquarie Park
    - Westmead to Malabar via Central Sydney
    - Macquarie Park to Hurstville via Sydney Olympic Park and Burwood
    - Parramatta to Hurstville via Bankstown[18]

The 10 subregions that were identified in the 2010 Metro Strategy have been rationalised into 6 subregions under the Draft Metro Strategy. The South subregion has been retained but has been modified to exclude Marrickville LGA.

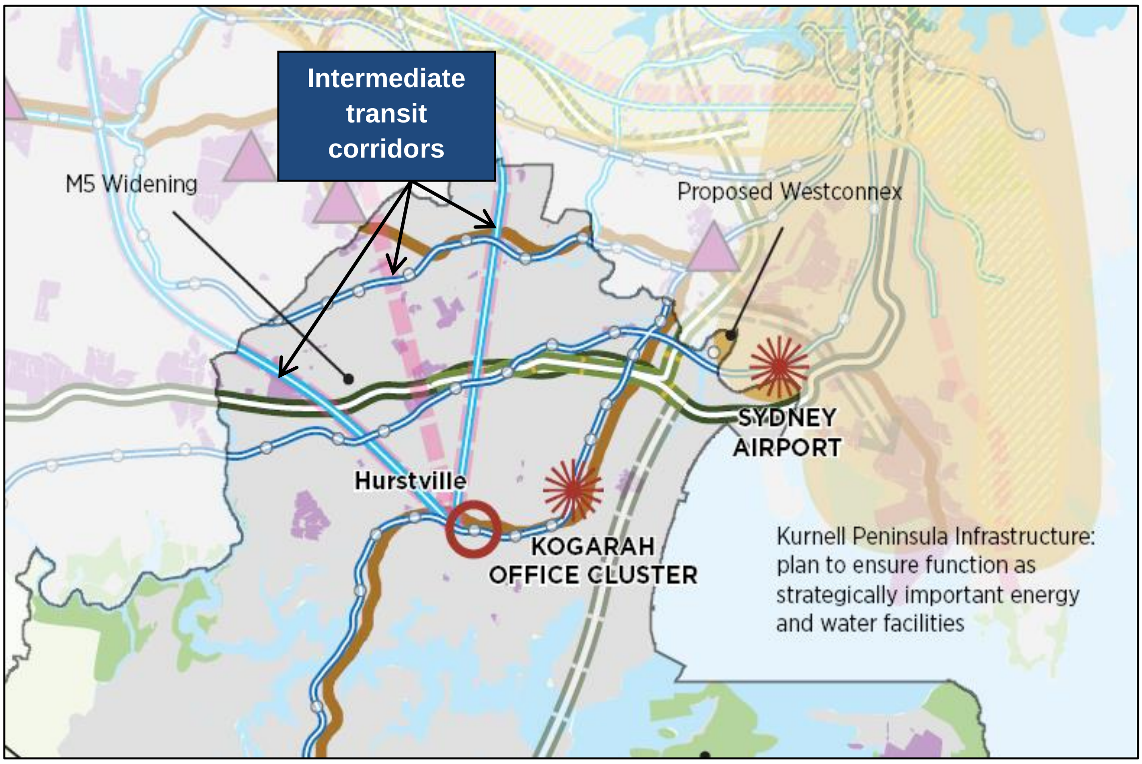
The metropolitan priorities for the South subregion (as shown in **Figure 4.3**) that have the potential to affect Canterbury LGA housing planning are the investigations for transport and urban renewal along the following north-south strategic transit corridors planned to pass through the LGA:

- Hurstville to Burwood and beyond, via Campsie.
- Hurstville to Sydney Olympic Park and beyond, via Belmore / Lakemba.
- Hurstville to Bankstown and Parramatta, via Narwee / Riverwood.[19]

There is no detail provided in the strategy on the type or timing of transport infrastructure in these corridors. The future transport links have the potential to provide a driver for higher density housing along the corridor and around transit junctions on the Bankstown Line. Until there is more clarity in these proposals, they should not significantly influence housing planning decisions for Canterbury LGA.

[18] pp68-77

[19] p98



Source: Draft Metro Strategy, p98

Figure 4.3 Draft Metro Strategy South subregion transit corridors

4.2 Local planning settings

4.2.1 Strategy plans and policies

Community Strategic Plan

Imagine Canterbury - Canterbury LGA's community strategic plan - provides only broad direction for residential development policy.

Planning for housing growth and housing diversity does not feature prominently in the Top Ten Community Priorities. Priorities with a less direct connection to residential development policies include the following:

- Transport alternatives that work – essential for population and housing growth and a sustainable city.
- Vibrant town centres – people space - a meeting point, a hub, where people can interact, relax, and shop.

In relation to the latter, Council has identified a role for housing in the ongoing evolution of the centres. That is, suitable housing in town centres would supply consumers for local businesses and change the dynamics in purely retail and commercial and retail, to entertainment and leisure.[20]

[20] Imagine Canterbury, p18

As part of the Attractive City priority area, Imagine Canterbury states that the City will have mixed development, not over development and will cater for the employment, housing, shopping, recreation, leisure, social and entertainment needs of children, adults and elders within the community. Also, a strategy to achieve an attractive city is to produce urban planning policies which facilitate sustainable urban development. One of the Attractive City long term goals is 'balanced urban development'. That is, development that brings attractive and sustainable buildings and homes, and a balance of houses and units, residential and business areas, and historic and modern streetscapes.[21]

Economic Development and Employment Strategy

Towards 2032 – City of Canterbury Economic Development and Employment Strategy (**Towards 2032**), prepared in 2009, examined employment lands within Canterbury LGA and recommended economic and employment development strategies for the next 30 years.

Towards 2032 was prepared in part to respond to the 8 percent decline in local jobs between 1996 and 2006. The Draft South Subregional Strategy had set a target of 500 jobs growth between 2001 and 2031. One of its objectives was to provide a plan to attract new businesses and to encourage the expansion of existing businesses.[22] However, at a time when local population was increasing, employment declined a further 1.5 percent between 2006 and 2011. Manufacturing has been an ongoing major contributor to the loss of jobs in Canterbury LGA, and in the period since 2006 retail trade and health care and social assistance overtook manufacturing for the first time as the leading employment industries.[23]

Relevant to this RDS, one of the purposes of Towards 2032 was to 'recommend planning controls quarantine existing land for employment as required'.[24] The Strategy's recommended planning actions seek to, among other things, 'protect well-functioning employment lands and strengthen existing and future centres'.[25]

Towards 2032 identifies the M5 Motorway as a 'key asset' providing access to particularly the major employments lands at Riverwood and Kingsgrove. While the strategy notes that the limited on / off ramps reduce the utility of the M5, the southern employment precincts are clearly the most accessible to the strategic road network. Kingsgrove is to be supported as the 'premier employment lands precinct' in the LGA'.[26]

Land use recommendations for specific employment areas were contained in the 'Draft Strategic Directions Map'.[27]

One of the key Towards 2032 strategies is to establish a 'Canterbury Business Link' in the Kingsgrove / Campsie / Canterbury / Hurlstone Park arc, including the action of 'consider opportunities to promote increased residential densities within the catchment of the Campsie centre'.[28]

There is pressure from time to time to convert industrial land to residential land. This is somewhat due to most of the industrial areas being contained by, and with few buffers to,

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[21] Ibid., pp28, 31

[22] Towards 2032, p4

[23] Canterbury Economic Profile, accessed at http://www.economicprofile.com.au/canterbury/trends/jobs#table

[24] Towards 2032, p3

[25] Ibid., p9

[26] Ibid., p13

[27] Ibid., p10

[28] Ibid.

residential areas. The former Sunbeam site is an example of a major traditional employment site being converted to residential use.

Only two current employment areas were recommended by the strategy to be rezoned to residential purposes: Ashbury and Payten Avenue, Roselands. Conversion to residential is a feature of several of the LEP submissions, and this RDS generally concurs with the recommendations of Towards 2032 in regard to specific precincts. The Payten Avenue site was rezoned to R4 Residential in Canterbury LEP 2012.

In summary, Towards 2032 established that Canterbury's current employment lands are the primary resource available for the LGA to preserve its existing jobs and to increase the number of jobs for residents of both the LGA and the subregion. Council and State Government should not pursue zoning strategies that give up this resource in favour of providing more land for residential purposes, unless there are compelling reasons to do so.

However, the role of different urban areas does change over time and it would be reasonable to alter land use strategy to accommodate changing needs. Towards 2032 establishes that the southern employment areas nearer the M5 Motorway are more crucial to be retained for employment uses, while isolated pockets of employment land are or may be more suitable for residential and 'live-work' arrangements. It is not clear why certain isolated industrial lands are more suitable for conversion to residential purposes than others. For instance, Towards 2032 provide no compelling evidence as to why Ashbury should be residential and not Croydon Park, when both are distant from the motorway network and both area entirely contained by residential uses.

The RDS recommends that until / unless significant increased housing targets are imposed on Canterbury LGA, Council continue to pursue the Towards 2032 land use strategy. In the event of significant increased housing targets, Council could revisit the Towards 2032 strategies in relation to employment areas that are currently in transition. Ashbury, Croydon Park and the Harp Street area would fit the definition of an area in transition.

Canterbury Road Master Plan

The Canterbury Road Master Plan was prepared in 2010.

The Master Plan developed vision for the corridor that sought to increase quality development and generate a sense of place, without compromising the mobility function of the road. The Master Plan summarised ideal future development of the corridor as follows:

> *…create a node of highest intensity, genuinely mixed use at Canterbury Town Centre, and a lower level of intensity of pedestrian orientated mixed uses at important intersections along the Road. the remaining stretches in between should then be predominately built as support mixed use and residential to re-focus finer grain commercial and retail investment back into the pedestrian orientated centres*.[29]

The development vision is to be achieved by four main 'character areas' shown in the Corridor Structure Plan, and as described in **Table 4.1**.

[29] Canterbury Road Master Plan, p19

Table 4.1 Canterbury Road Master Plan land use scheme

Character area type	Features
Urban Core	Mixed use buildings including retail, commercial and residential 3-9 storeys in height Active retail frontages Only in Canterbury Town Centre
Urban Centre	Mixed use buildings including retail, commercial and residential, showrooms not permitted 3-6 storeys in height Active retail frontages Applies at important intersections
Urban General	3-6 storeys in height Street level uses can be retail, commercial and residential Showrooms permitted Applies to gaps between Urban Core and Urban Centre categories
Urban Residential	3-5 storeys in height Buildings setback form the street to create 'green breaks' between the Urban Core, Urban Centre and Urban General categories

Source: Canterbury Road Master Plan, pp 22-23

Overall, the Canterbury Road corridor is envisaged by the Master Plan to be a mixed use corridor, with most stretches of the road, subject to minimum amenity requirements being met, having an important role to play in providing additional residential accommodation for the Canterbury LGA.

4.2.2 Local environmental plan

The Canterbury LEP 2012 came into effect on 1 January 2013 and is the principal environmental planning instrument applying to land development in the Canterbury LGA. The LEP is comprised of a written instrument and a set of maps which guide development and regulate land uses throughout the Canterbury LGA. This LEP replaced a suite of old planning instruments that applied to various areas within the Canterbury LGA. It resulted in a partial implementation of the Canterbury Road Master Plan and residential density was increased around some town centres.

There are three main residential zones within the Canterbury LGA. These include the R2 – Low Density Residential zone, R3 – Medium Density Residential zone and R4 – High Density Residential zone. These zones and related planning controls including building heights and floor space ratio (**FSR**) have been outlined in **Figure 4.4** over page. It is understood that the new LEP included minor increases to the floor space ratio in a number of residential land use zones. The spatial distribution of the Residential zones is shown in **Figure 4.5**.

The following zones also permit residential development, but only in a shop-top / mixed use format with other commercial land uses:

- Zone B1 Neighbourhood Centre
- Zone B2 Local Centre
- Zone B5 Business Development

The Business zoned lands have so far played a relatively minor role in the delivery of all housing in Canterbury LGA (i.e. 24 percent of all dwelling completions in the 2004-2012 period), although they are the chief means through which housing within centres and along the Canterbury Road corridor will be delivered.

R2 Low Density Residential Zone

- The two main areas zoned R2 in Canterbury include the eastern suburbs of Ashbury and Earlwood.
- The R2 low density zone was adopted by Council to preserve the predominant building form of low density detached dwellings in those areas.
- ***Permitted Residential Development***
  - Detached dwellings, dual occupancies, secondary dwellings, boarding houses, semi-detached dwellings.
- ***Main Planning Controls***
  - Maximum building height of 8.5m (2 storeys) and a maximum FSR of 0.5:1. Minimum site frontage for dual occupancies of 15m.
- ***Typical building forms and future development within Ashbury***
  - The area has been identified as a conservation area. As such, there are limited redevelopment opportunities within this area, unless the site is identified as a 'non-contributory building' to the conservation area. In any event, redevelopment would be limited to a dual occupancy.
- ***Typical building form and future development within Earlwood***
  - The suburb of Earlwood has more potential for redevelopment than Ashbury as there are no heritage constraints on properties within this area.

R3 Medium Density REsidential Zone

- The R3 Medium Density Residential zone is the most common residential zone throughout Canterbury, and is found throughout the LGA except for Earlwood and Ashbury.
- ***Permitted Residential Development***
  - Multi dwelling housing (i.e. horizontally-separated attached housing such as townhouses, terraces, villas) in addition to housing types permitted in the R2 zone.
- ***Main Planning Controls***
  - Maximum building height of 8.5m (2 storeys) and an FSR of 0.5:1 with parking required at the ground level.
  - Medium density developments require a 20m frontage with dual occupancies only requiring a 15m frontage. This can often determine the type of development constructed as the consolidation of two or more lots to achieve the required 20m frontage may not be worth the effort of the developer (i.e. insufficient financial return even though a higher density is possible). This has resulted in a significant amount of dual occupancy development in the R3 zone.
- ***Typical building forms within the R3 zone***
  - Currently the R3 zoning includes a range of building forms throughout the LGA consisting of multi-dwelling housing, dual occupancies and detached dwellings. There are also many low rise residential flat buildings 2-3 storeys in height, which are remnant from the 1960s when this form of development was permitted in these areas.

R4 High Density Residential Zone

- The R4 zone is largely situated to the north of Canterbury Road and is located, although not exclusively, near railway stations.
- There are a small number of R4 zoned pockets to the south of Canterbury Road, predominately within Campsie, Canterbury, Earlwood, Narwee and Riverwood. of these, Riverwood is the most significant, catering for a concentartion of Department of Housing development.
- ***Permitted Residential Development***
  - Only zone in Canterbury LGA that permits residential flat building (RFB) developments. The R4 zone also permits all other forms of residential development permissible within the R3 and R2 zones.
- ***Main Planning Controls***
  - Detail the FSR and height controls.
  - Maximum building heights vary between 8.5m (2 storeys) and 27m (8 storeys) depending on location. FSRs vary between 0.75:1 and 3:1 depending on locations, although most areas have an FSR of either 0.75:1 or 0.9:1. Parking must be provided underground for all RFB and multi dwelling housing developments.
  - Medium density developments require a 20m frontage with dual occupancies only requiring a 15m frontage.
- ***Typical building forms within the R4 zone***
  - The R4 zone includes all forms of residential dwellings and has the highest population density in comparison to any of the other residential zones in Canterbury.

Figure 4.4 Residential zones in Canterbury LGA

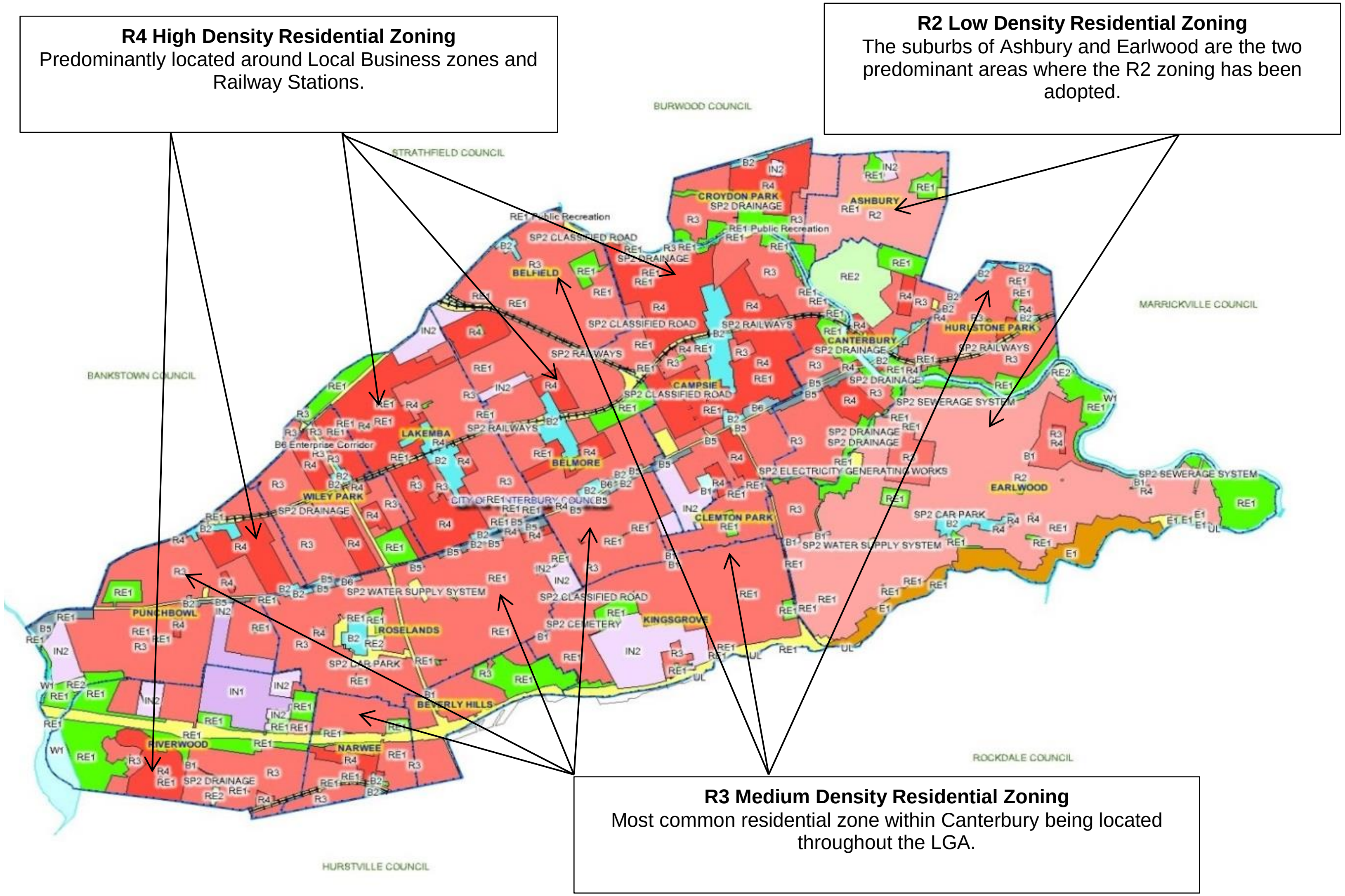

Figure 4.5 Location of Residential Zones

4.2.3 Development control plan

In support of the new LEP, Canterbury Development Control Plan (**CDCP**) 2012 came into force on 1 January 2013 which provided design guidance for all developments. The CDCP replaced the previous suite of more than 30 DCPs which were being used by Council. The key planning controls did not changed substantively for housing.

The CDCP's main planning controls applying to development within Canterbury are summarised in **Table 4.2**.

Table 4.2 Summary of planning controls for housing - Canterbury Development Control Plan 2012

Planning Control	Requirement			
	Dual occupancy	Multi dwelling housing in R3 Zone	Multi dwelling housing in R4 Zone	Residential flat building
Minimum site width	15m	20m (on a local road) 27m (on a major road)		Varies, but includes: 20m (up to 3 storeys on a local road) 27m (up to 3 storeys on a major road) 30m (4 – 6 storeys)
Maximum building height	Two storeys	Two storeys (initial 20m depth of site) Single storey thereafter	Two storeys (initial 20m depth of site) Single storey thereafter	Varies; but includes: 3 storey (HoB map 11.5m) 4 storey (HoB map 14m) 5 storey (HoB map 18m) 6 storey (HoB map 21m).
Minimum site depth	25m	20m	25m	25m
Maximum site coverage	60% of site where the area is less than 450m^2 50% of site where the area is at least 450m^2 but is less than 600m^2 40% of site where the area is at least 600m^2			
Car parking	1 - 2 bedroom = 1 space 3^+ bedrooms = 2 spaces	Studio and 1 bed = 1 space 2 bedroom = 2 spaces + 0.2 common spaces 3+ bedrooms = 2 spaces 10+ dwellings require a car wash bay and visitor parking		
Parking allowed in basement format	No	No	Yes	Yes
Private open space	Minimum 75m^2 per dwelling	Minimum 50m^2 per dwelling. In addition, 15% of the required open space to be provided for common open		Provision of one or more balconies or terraces per dwelling. Minimum

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Planning Control	Requirement			
	Dual occupancy	Multi dwelling housing in R3 Zone	Multi dwelling housing in R4 Zone	Residential flat building
		space.		area: 1 bed = 9m^2 2 bed = 12m^2 3+ bed = 16m^2 In addition, 15% of the required open space to be provided for common open space.

Apart from minor changes to update controls in line with current guidelines, the significant amendments within the CDCP as compared to previous policies have been highlighted below. The majority of these changes relate to multi dwelling housing developments (townhouses / villas) with new provisions being adopted for residential flat buildings between four (4) and six (6) storeys in height.

Multi dwelling housing:

- Deletion of density provisions in lieu of floor space ratio maps which were adopted as part of Canterbury LEP 2012.
- Deletion of the dwelling/bedroom size provisions which acted as a density control.
- Private open space requirements standardised based on bedroom numbers.
- Prohibiting basement parking for multi-dwelling developments located within the R3 Medium Density Residential zone. Basement parking is permitted within the R4 High Density Residential zone.
- Requirement for common open space.

Residential flat buildings:

- New provisions for developments which are four to six storeys in height.

Also, Council in 2006 amended the minimum site area requirements in relation to dual occupancy developments. This control was increased from 460m^2 to 600m^2 which initially had a negative impact on the number of dual occupancies constructed within the LGA. Dwelling completion data for recent years however show the number of dual occupancies increasing again (refer Section 5.2).

4.3 Planning controls and development viability

One aspect of the RDS is to review the viability of the existing planning controls applying within Canterbury LGA.

There are several indicators that can be used to identify whether the planning controls continue to encourage investment in new development.

On the surface the fact that Council has been consistently met its residential targets (refer section 5) would suggest that developers are still finding opportunities for new development under the existing planning controls and adding to housing stock on a yearly basis.

Further, it is noted that the submissions to the new LEP or considered as part of this RDS primarily focus on identifying new zoning opportunities and the controls that should apply to them. Only one submission sought variation to increase height and floor space of the existing controls to address viability issues.

Viability is typically influenced by:

- a change in the planning controls or processes which increase costs of development or delays in the processing of applications
- increase in direct costs such as Section 94 or other government charges
- a reduction in sales prices of end product
- a reduction in the supply of housing within a specific market

Change in planning controls or processes

There has been no change in planning controls or processes that would increase costs for development or introduce inefficiencies in design or timing of construction. Indeed it is noted that the recent gazettal of Canterbury LEP 2012 focused on translating existing controls into the new Standard Instrument format LEP. It is further understood that Council took the opportunity to slightly increase existing floor space ratios and heights in a number of zones, which should have improved viability.

Increase in direct costs

There have been no new levies or contributions applying to development. The section 94 contributions plan has been recently reviewed but the increase in contributions were relatively minor and not sufficient to impact on viability of projects.

After the GFC bank lending policies are now relaxing and reduction in interest rates are being passed on to borrowers. This would generally improve viability of development.

Reduction in sales prices

The viability of development will be impacted by a reduction in sales prices in a market. Wholesale reduction in prices has not occurred since the GFC. The real estate market in Canterbury LGA, like much of the Sydney, will have benefitted for the State Government's concessions on stamp duty for first home purchasers in broadening the market, particularly for off the plan purchasers. As this has been announced as a temporary measure it is unlikely developer would have factored this into their feasibilities. However, those with product on the market would have benefitted from this initiative, particularly in sales rates.

Sometimes sales prices can reduce or stagnate if there is an abundance of competition in the same market. Canterbury LGA has a wide variety of product and its medium and higher density housing is largely pitched at the affordable and first homeowner purchaser where there is ample demand. It is unlikely that measures to increase targets and hence bring more stock to the market will result in a reduction in sales prices. However, Council will need to monitor this closely. This will need to be monitored as the State Government pushes for higher delivery prices.

Reduction of housing supply

There can be viability impacts if there is an under supply of opportunities (typically land for development) in a particular market and owners are holding out for higher land prices. Certainly this is not the case in the R3 Medium Density Residential zone where there are ample opportunities to assemble sites for development. In the R4 High Density Residential Zone, there are a few areas that are becoming substantially complete with fewer opportunities to assemble a site suitable for development.

Most areas, however, still provide opportunities for higher density housing and indeed further opportunities were added when Canterbury LEP was gazetted. Residential flat buildings and apartments in mixed use developments represented the greatest increase of dwelling stock between 2004 to 2012 at 820 dwellings, showing a good supply of housing opportunities for higher density development (refer to **Table 5.3**).

4.3.1 Residential Development Feasibility Model

Typically an RDS examines opportunities to change the existing controls to help facilitate new development or change zonings to into brand new opportunities for residential development in the Canterbury LGA. As will be discussed later, the RDS contains a series of recommendations that touch on both aspects of changing existing planning controls and rezoning land.

It is important in both cases that Council has the tools to assess the impact of changes to ensure the viability of development is maintained or improved. To do this a residential development feasibility modelling (**RDFM**) tool has been prepared which enables Council to examine the impact of any specific changes to the developer's current baseline return. It can also be used with other methods to help monitor the supply of land (by tracking movements in land values and site values) or need to provide further opportunities to the housing market to ensure adequate supply.

The RDFM was prepared from extracting some key information from sample developments in Canterbury LGA and discussion with developers. The metrics used to build the RDFM are those typically applied by developers and builders and each is discussed further at **Appendix B**.

As part of the assessment of a number of sample development applications that have been approved and built the RDFM was used to test whether the selected developments in each zone, and based on the planning framework in place met the typical benchmarks sought by a typical developer or builder. In all cases the tool confirmed the projects were commercially viable by meeting the benchmarks and providing accepted commercial returns.

The RDFM tool identifies the key inputs which drive a development feasibility and enables Council to adjust these inputs to assess the impact of a single change (such as changing a control which may increase or reduce cost or reviewing the impact on Section 94 Contribution increases) or multiple changes that may occur over time including changes to interest rates, sales values and the like.

The RDFM's use as a tool to track shortages in supply and hence spikes in land value (or the premium a developer needs to secure a new site) has limitations.

The most difficult part of any development is the site acquisition stage as the developer must assess the premium a land owner may want in order to sell their land.

Landing on a fixed percentage increase as a premium to secure land is problematic as it depends on what will induce or motivate a land owner to sell. Where there is ample supply the premium paid for site acquisition will be minimal. Where there is an under supply or limited zone(s) permitting a type of specific type of development then land owners may well hold out for higher land prices. This is likely to slow development in this area which will be readily apparent in an area by a reduction in applications.

Developers will only be able to purchase land based on achieving the benchmarks in their feasibility taking into account the end sales prices of the dwellings and costs over time. If an owner holds out for higher prices, the developer will not be in a position to purchase and supply will be stalled until the owner's expectations are adjusted or end sales prices increase. The market is self-adjusting in this respect.

Based on our investigations, there is nothing to suggest that land prices in Canterbury are significantly out of kilter with the market or that land prices are stalling development.

4.4 Infrastructure plans and capacities

Infrastructure is a necessary component of any new development within an area to support the incoming population and increase housing supply. A review of the infrastructure capacity within the Canterbury LGA has been undertaken below which relates to transport, education, open space, community facilities and services.

4.4.1 Transport

Transport NSW produced a *NSW Long Term Transport Master Plan* (**LTTMP**) (December 2012) which sets out the framework for delivering transport in NSW over the next 20 years. This Plan reviews transport demand corridors taking into account land use planning and forecasted travel demand as a result of population and employment growth.

The two primary modes of transport to work within Canterbury LGA include private vehicles and travel by train accounting for approximately 74 percent of the population. Canterbury has two train lines (Bankstown and East Hills Lines) which operate through the LGA and a number of arterial roads which carry a significant volume of vehicle trips per day.

Peak passenger flows on the rail network in general occur weekdays between 8am and 9am. According to CityRail data, morning peak hour city bound passenger train operations in 2010 on the Bankstown line were operating at 110 percent loading (6,000 capacity and 6,630 utilisation) while the East Hills line was just under 100 percent loading (12,000 capacity and 11,945 utilisation).

The projected residential population within the Sydney Metropolitan Region will generate additional demand particularly for morning and afternoon peak hour travel. There are a number of strategies identified within the LTTMP to address the current issues within the system and projected future demand on services to ensure that suitable upgrades and strategies can be implemented to support this growth.

As identified within the recently exhibited White Paper, the location and provision of infrastructure is being integrated into the planning system to guide housing and employment growth along with assisting to align budget funding. This involves the development of Metropolitan Regional Growth Plans and Subregional Delivery Plans. These plans are to incorporate national, state and regional infrastructure including rail and road so that these facilities are integrated into the planning framework. The input of infrastructure located within Canterbury LGA into these plans should ensure that any projected housing growth is capable of being supported by this infrastructure.

4.4.2 School education

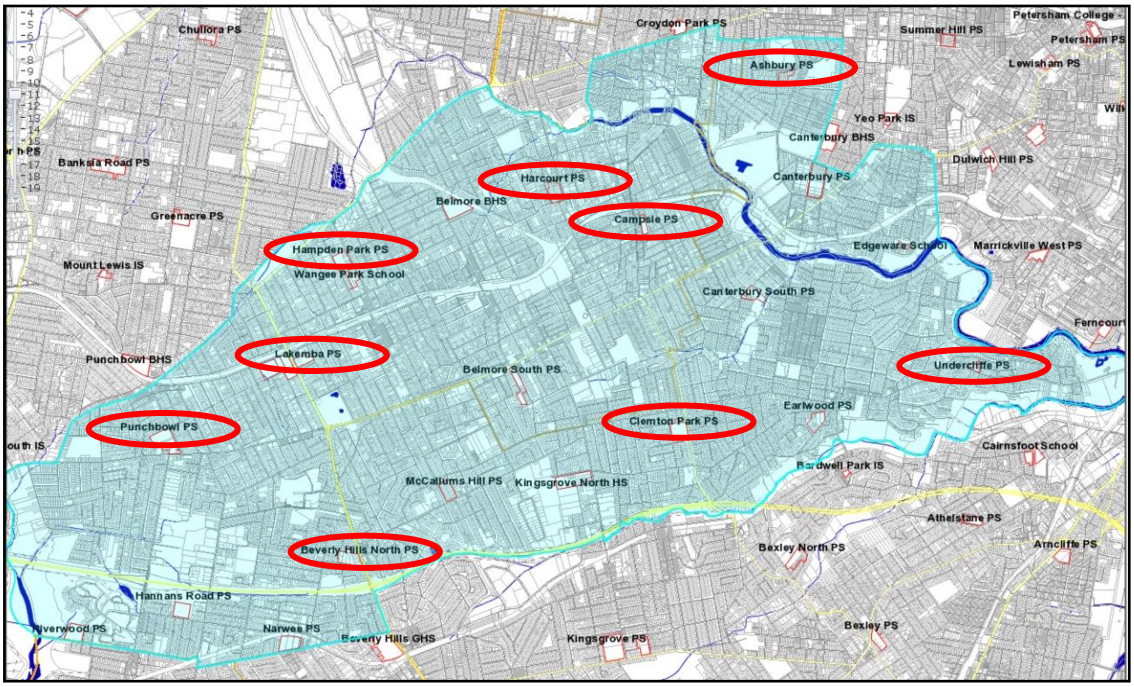
The NSW Department of Education and Communities (**DEC**) collects data in relation to current and projected student enrolments within public schools across NSW and the utilisation rate of schools. The utilisation rate is the percentage of teaching space demand (number of classrooms) utilised in comparison to the number of permanent classrooms available within a particular school. Additional demand beyond the number of permanent classrooms within a school is then accommodated through the provision of demountable classrooms which provides flexibility to adapt to fluctuating student numbers.

The most recent DEC data shows wide variations in the utilisation rates across the schools in the Canterbury LGA. A review of the utilisation rates in 2013 identified the following schools had a utilisation demand rate above 100 percent (and as shown within **Figure 4.6**):

- Beverly Hills North Public School (108%)
- Campsie Public School 103%)
- Hampden Park Public School (115%)
- Harcourt Public School (112%)
- Lakemba Public School (124%)
- Punchbowl Public School (117%)
- Wiley Park Public School (103%)
- Ashbury Public School (107%)
- Clemton Park Public School (116%)
- Undercliffe Public School (114%)

A number of the schools with high utilisation rates are located in areas anticipated to increase in dwelling density in the coming years such as Campsie and Clemton Park (former Sunbeam site). These areas appear to be surrounded by schools with lower utilisation rates which have the capacity to accommodate additional pupils. The DEC has forecast projected enrolments for 2017 to identify classroom needs and plan for any projected increase in classroom demand.

Any review of school walking catchments and increased dwellings densities beyond that currently provided for should involve further discussions with the DEC so that potential enrolments in these areas can be suitably adjusted where necessary to accommodate any anticipated increase in teaching demand.



Source: Base map provided by NSW Department of Education and adapted to show schools with a utilisation rate above 100% (shown within red circles)

Figure 4.6 Location of public schools within Canterbury LGA

4.4.3 Open space

Council prepared a *City of Canterbury Strategic Recreation Plan* (**SRP**) dated March 2012 (adopted 23 June 2011). The purpose of the SRP was to provide the strategic framework for the provision of quality and appropriate recreation services and facilities to address the current and future needs of the City of Canterbury community.

The SRP identifies that Canterbury has 345 hectares of public open space which includes structured playing fields, parks, reserves, bushland reserves and park areas. Based on the 2012 estimated resident population 146,314 people, this equates to approximately 2.36 hectares of public open space per 1,000 residents. The current provision of recreation in Canterbury LGA according to the SRP includes the following:

- 30 structured playing fields
- 95 playgrounds
- 217 parks and reserves
- 24 tennis courts
- 4 bushland reserves
- 2 Aquatic and Fitness centres
- 1 golf course
- 1 Multipurpose/ youth centre
- 10 senior citizens/ community centres

Council has recently adopted a new development contributions plan for the LGA. The plan identifies a number of land acquisitions and works so as to address future population growth of around 12,700. The works include improvements to facilities at thirty-nine (39) parks across the

LGA as well as linear works such as pathways and underpasses, partnership with schools, a range of park upgrade programs improving signage, lighting, playground and training facilities and bike storage racks at 20 locations.

This plan requires regular updates to ensure it is aligned with the growing Canterbury population and identified housing targets for the area.

4.4.4 Community facilities

The draft CP's community facility infrastructure requirements have been based on *Community Facility Plan for the City of Canterbury* (**CFP**), prepared by GML Social Research, January 2006.

According to the CFP, Canterbury Council provides a large number of community facilities utilised by community development and social support agencies throughout the City. These facilities comprise 13,900m^2 of library floor space and 10,557m^2 of other types of community facilities floor space. These facilities include:

- 6 Senior Citizen's Centres;
- 5 Baby Health Centres;
- 4 Multipurpose Community Centres;
- 4 Early Learning Centres operated by Council;
- 3 community-based children's centres;
- 3 specific purpose community facilities;
- 2 Women's Rest Centres;
- a Multi-purpose Youth Resource Centre; and
- a central library and 3 branch libraries.

The draft CP identifies a number of works to reasonably meet the needs of an expected incoming population of 12,700 people. The current provision within Canterbury equates to 77.85m^2 of community facilities (not including libraries) per 1,000 population. The proposed works are to maintain this provision of community facilities, and includes:

- New or improved community centres at Lakemba, Earlwood and Canterbury / Hurlstone Park;
- Fit-out at Campsie Community Arts Centre;
- New central library at Campsie and improved facilities at Riverwood;
- Provision of a community hall at the Sunbeam development site; and
- Improvements at the Carrington Centre in Campsie to provide interview rooms, meeting spaces and other facilities.

As detailed in the Open Space section, regular updates are required to the contributions plan to ensure it is aligned with the growing population of Canterbury LGA and the identified housing targets for the area to support the expected growth.

4.4.5 Utility services

The settlement pattern of Canterbury is fairly consistent having spread across the entire LGA with higher densities clustered around transport nodes. There are limited areas remaining within the LGA to date that have not been developed in comparison to Council's located in the outer ring of Sydney with large greenfield sites for new release housing.

Due to the development within Canterbury being established, any additional requirement in utility services such as water, sewer, electricity or gas will generally be augmentation of existing facilities to upgrade the current configuration.

4.5 Summary

The State Government, through the draft South Subregional Strategy, has set Canterbury LGA a housing target that equates to an average 263 dwellings per annum between 2004 and 2031.

At the time of preparing this RDS the State Government had exhibited an updated Draft Metro Strategy. It identifies housing targets at the subregional level, with 42,000 net additional dwellings proposed for the South subregion between 2011 and 2031 (a 20 year period). The strategy also describes an interim 10 year target of 22,000 extra dwellings by 2022. The Draft Metro Strategy will likely lead to significantly higher housing targets for all LGAs including Canterbury.

The Draft Metro Strategy also sets the following strategic directions for land use policy at the local level:

- Provide for economically viable development opportunities
- Provide housing in locations in or near centres,
- Locate housing opportunities to take advantage of existing and planned public transport infrastructure (i.e. the LTTMP's Strategic Transit Network)
- Ensure a well-located supply of industrial lands
- Resist rezoning of employment and industrial land where the proposal is inconsistent with the Industrial Lands Strategic Assessment Checklist

Canterbury LGA's strategic plans and policies (such as the economic strategy and Canterbury Road plan) generally support these key directions.

The primary planning documents driving the creation of new housing in Canterbury LGA are the Canterbury LEP 2012 and the DCP. The residential land use zones in the LEP - R2, R3 and R4 – accommodate the bulk of the housing. Dwellings in a shop-top / mixed use format with other commercial land uses are permitted in B1, B2 and B5 zones.

The LEP contains the key controls of building height and FSR, while the DCP addresses further design matters including site coverage, parking, and site frontage.

A review of the planning controls was undertaken in terms of whether the controls were enabling viable residential development. Viability is typically influenced by such factors as changes to controls which increase costs of development, changes to development fees and charges, reductions in sales prices of end product, and reductions in the supply of housing within a specific market. The review found that none of these factors were presenting themselves in the Canterbury LGA housing market. In general, planning controls are supportive of development, direct costs have not significantly increased, sales prices have been improving, and there is a wide variety of housing product being produced. In addition, a feasibility tool was prepared and applied to a sample set of DAs. The tool confirmed the projects were commercially viable by meeting the benchmarks and providing accepted commercial returns.

Continued consultation with stakeholders is required to ensure the provision of infrastructure is suitable in meeting the needs set out in the housing targets. As outlined within the White Paper, infrastructure will in the future, need to be incorporated into Metropolitan / Regional Growth

Plans and Subregional Delivery Plans to ensure it is integrated with future housing and employment growth.

5.0 Dwelling creation performance and remaining dwelling capacity

This section includes an analysis of recent dwelling creation against the targets that have been set by the State Government, and an assessment of the capacity of the Canterbury LGA to meet the targets to the 2030s.

5.1 Subregional dwelling creation

Tables 5.1 and **5.2** and **Figure 5.1** show recent performance of the South subregion LGAs against the 2007 targets.

In recent years the South subregion has delivered new housing ranging between 1,059 and 2,656 dwellings per year.

Canterbury LGA's result equates to an average of 246 dwellings per annum over the 2004 to 2012 period, means that the LGA is almost on track to meet its South Subregional Strategy target of an average of 263 dwellings per annum (refer **Figure 5.2**).

While Canterbury's dwelling completions have fluctuated, there has been over the whole period a steady increase in dwellings. Dwelling completion rates dropped generally across Australia in the aftermath of the Global Financial Crisis in 2008, which impacted on the building sector as a whole. As shown in **Figure 5.3**, dwelling completion rates in 2010/11 recovered to the pre-GFC levels which was in part attributed to the Commonwealth Government's Nation Building stimulus building projects.

Table 5.1 South subregion dwelling creation 2003 – 2012

LGA	03/04	04/05	05/06	06/07	07/08	08/09	09/10	10/11	11/12
Canterbury	325	206	273	244	333	130	140	346	279
Hurstville	197	186	156	181	121	345	247	148	130
Kogarah	235	208	200	125	167	58	191	39	270
Marrickville	394	268	295	394	181	143	281	207	265
Rockdale	869	461	415	199	217	95	135	55	545
Sutherland	636	514	592	474	393	362	176	264	441
Total for South subregion	2,656	1,843	1,931	1,617	1,412	1,133	1,170	1,059	1,930

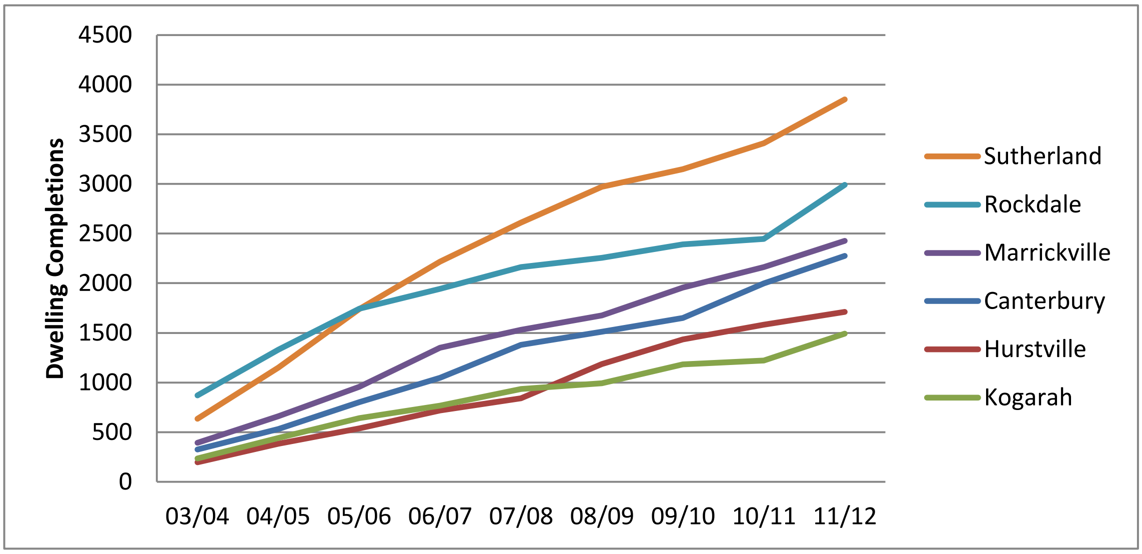
Source: MDP Annual Report (2009/2010 and 2010/2011) and MDP Quarterly Monitor (June 2012) prepared by the Department of Planning and Infrastructure

Table 5.2 South subregion dwelling creation and targets

LGA	Draft South Subregion Strategy housing targets (2004 - 2031)	Total dwelling completions[30] (2004/05 – 2011/12)	Proportion of target achieved
Canterbury	7,100	1,951	27%
Hurstville	4,100	1,514	37%
Kogarah	2,550	1,258	49%
Marrickville	4,150	2,034	49%
Rockdale	7,000	2,122	30%
Sutherland	10,100	3,216	32%
TOTAL	35,000	7,175	

Note: Marrickville proposed to be excluded from South subregion in Draft Metro Strategy

Source: MDP Annual Report (2009/2010 and 2010/2011) and MDP Quarterly Monitor (June 2012) prepared by the Department of Planning and Infrastructure



Source: MDP Annual Report prepared by the Department of Planning and Infrastructure (DPI)

Figure 5.1 Recent dwelling completions – Sydney South subregion

[30] MDP Annual Report (2009/2010 and 2010/2011) and MDP Quarterly Monitor (June 2012) prepared by the Department of Planning and Infrastructure

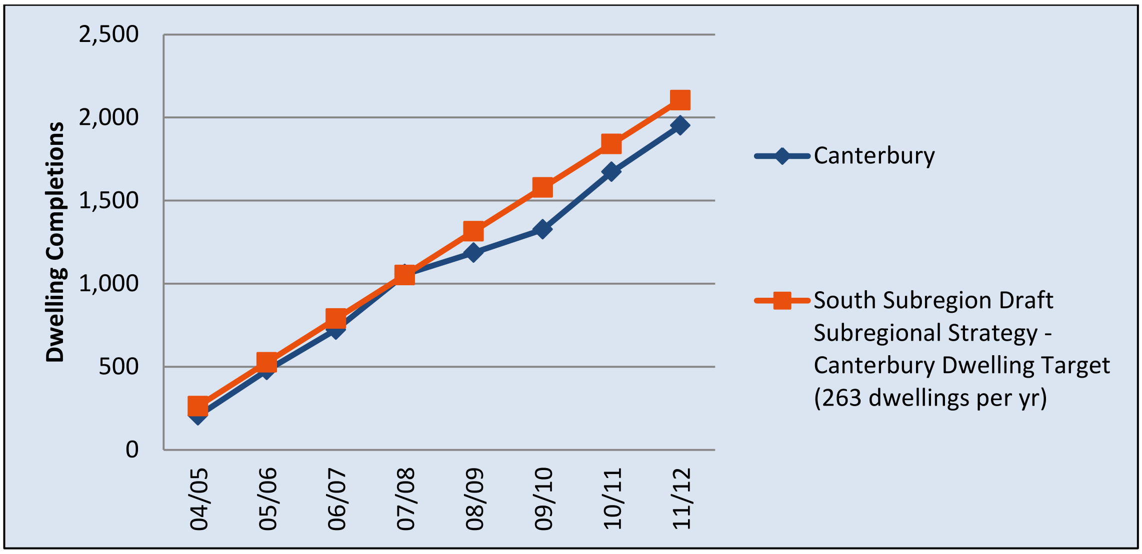


Figure 5.2 Dwelling completions and targets – Canterbury LGA – 2004-2012

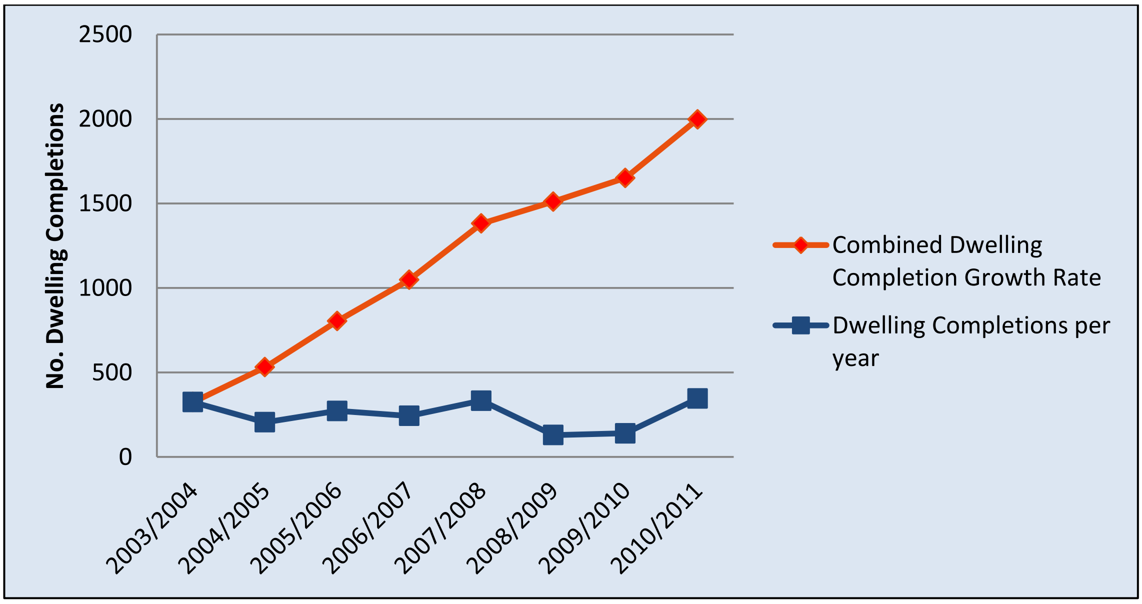
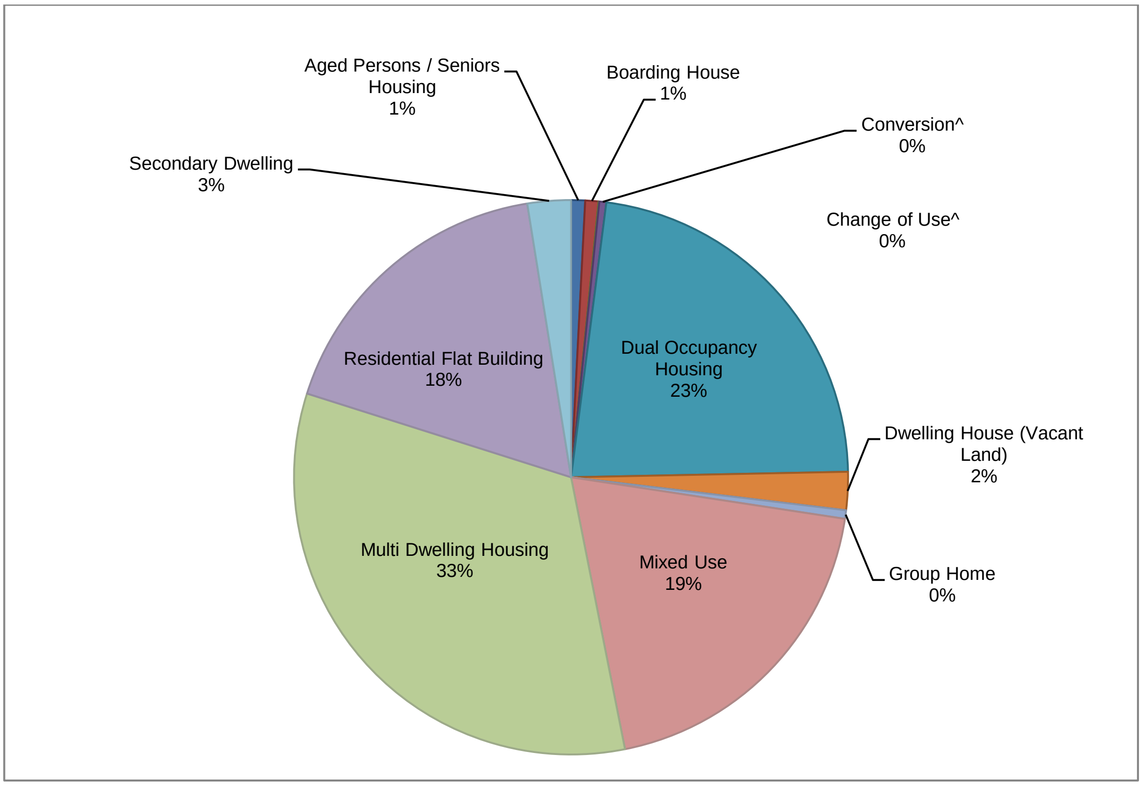


Figure 5.3 Canterbury LGA dwelling completions, 2003 to 2011

5.2 Canterbury LGA dwelling creation

5.2.1 Dwelling types

A closer analysis of the dwelling completion data for Canterbury LGA (refer **Figure 5.4**) shows that of the 2,212 net additional dwellings completed between 1 January 2004 and 31 December 2012, the highest proportions were represented by multi dwelling housing (33 percent), dual occupancies (23 percent), mixed use developments (19 percent) and residential flat buildings (18 percent). Combined, these housing types accounted for 93 percent of the total net additional dwellings within the Canterbury LGA during the 2004 - 2012 period.



^ These development types are identified as having 0% as the overall number of additional net dwellings is less than 1%
Source: Canterbury City Council

Figure 5.4 Net additional dwellings by housing type - Canterbury LGA – 2004 to 2012

A further breakdown of the predominant development types by land use zone has been summarised below:

Residential flat buildings (18 percent)

- 98 percent constructed in the R4 High Density Residential zone.
- 2 percent constructed in the R3 Medium Density Residential zone.

Multi dwelling housing (33 percent)

- 69 percent constructed in the R3 Medium Density Residential zone.
- 31 percent constructed in the R4 High Density Residential zone.

Dual occupancy housing (23 percent)

- 91 percent were constructed in the R3 Medium Density Residential zone.
- 6 percent were constructed in the R2 Low Density Residential zone.
- 3 percent were constructed in the R4 High Density Residential zone.

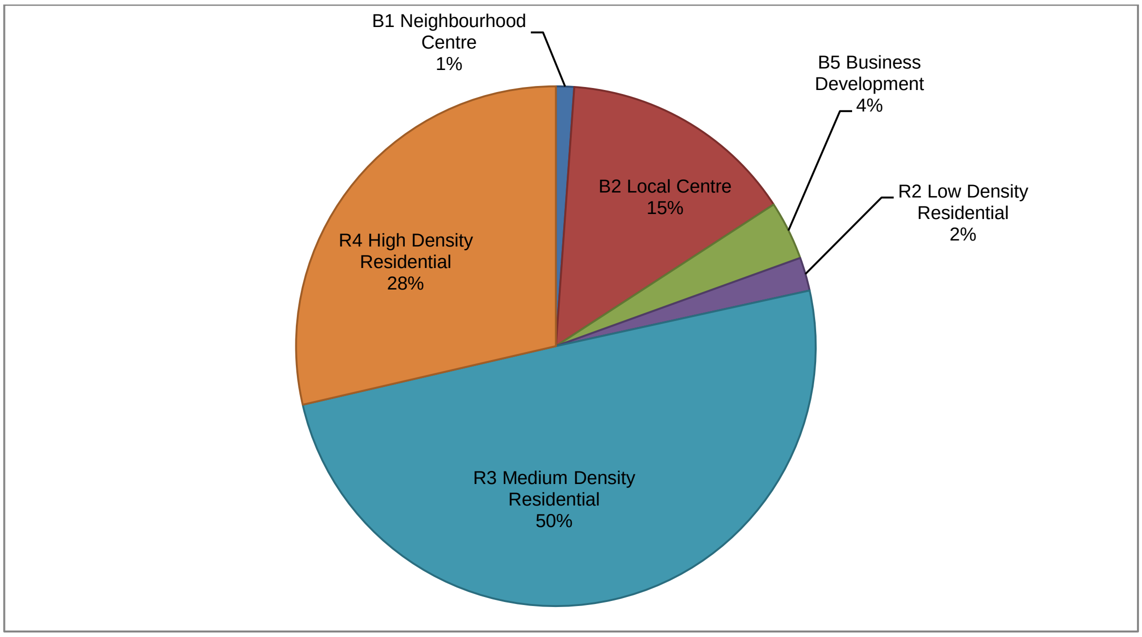
Mixed use (19 percent)

- 75 percent were constructed in the B2 Local Centre zone
- 19 percent were constructed in the B5 Business Development zone
- 6 percent were constructed in the B1 Neighbourhood Centre zone

5.2.2 Dwellings by zone

Figure 5.5 shows net additional dwellings within Canterbury LGA between 1 January 2004 and 31 December 2012 by land use zone. A large proportion of net additional dwellings (50 percent of the total net additional dwellings) were constructed on land within the R3 Medium Density Residential zone. This housing comprised both multi dwelling housing and dual occupancy developments.

The R4 High Density Residential zone and the B2 Local Centre zone ranked second and third for dwelling production with 28 percent and 15 percent of the total net additional dwellings, respectively. The housing in these zones would have comprised mainly residential flat buildings and shop top housing.



Source: Canterbury City Council

Figure 5.5 Net additional dwellings by land use zone - Canterbury LGA – 2004 to 2012

A further breakdown of the top three (3) land use zones producing net additional dwellings by development type has been summarised in **Table 5.3**. This table highlights the high numbers of dual occupancy housing developments being carried out within the R3 Medium Density zone which only trail multi dwelling housing developments by 5 percent.

Table 5.3 also shows that one-third of net additional dwellings within the R4 High Density Residential zone comprise multi dwelling housing developments despite developers having the option to construct residential flat buildings within the R4 zone on these properties (although the multi dwelling housing developments may have occurred due to the sites not having a minimum 20 metre frontage).

Table 5.3 Top three land use zones producing net additional dwellings - Canterbury LGA - January 2004 to December 2012

Development type	Net additional dwellings		
	R3 Medium Density Residential zone (producing 50% of net additional dwellings)	R4 High Density Residential zone (producing 28% of net additional dwellings)	B2 Local Centre zone (producing 15% of net additional dwellings)
Aged persons / seniors housing	18	-	-
Boarding house	17	-	-
Change of use	-	1	-
Conversion	9	-	-
Dual occupancy	453	17	-
Dwelling (vacant land)	49	-	-
Group home	11	-	-
Mixed use	-	-	431
Multi dwelling housing	504	226	-
Residential flat building	8	381	-
Secondary dwelling	48	8	-

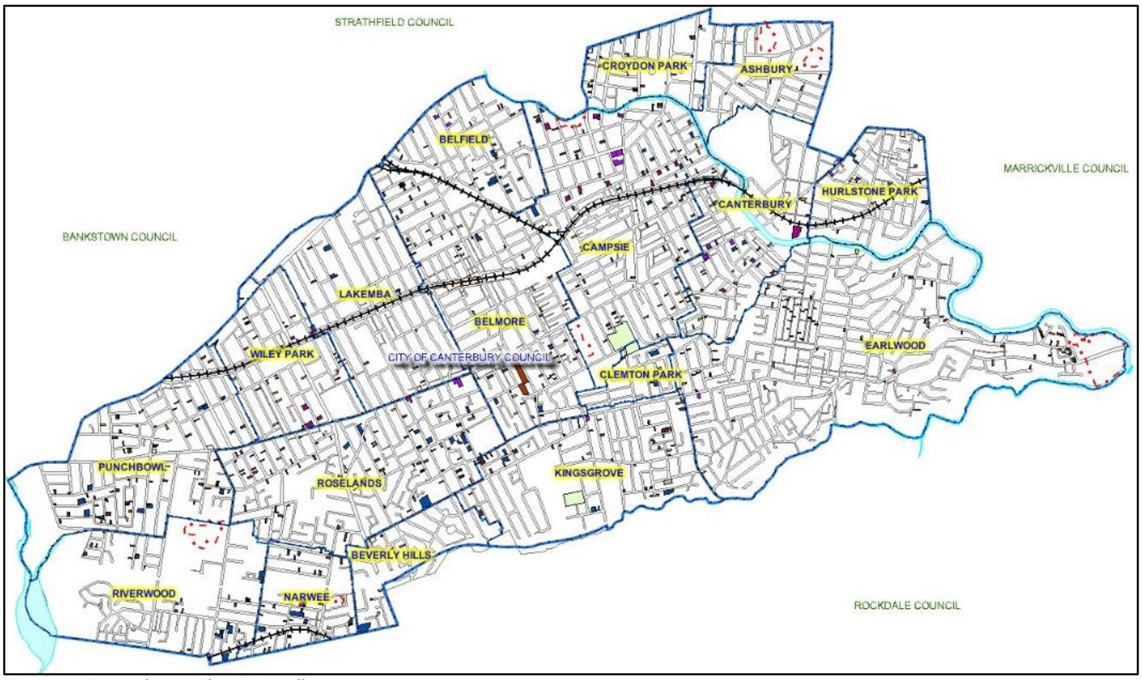
Source: Canterbury City Council

5.2.3 Dwellings by suburb

Figure 5.7 shows a breakdown of the net additional dwellings produced between 2004 and 2012 by suburb. The suburb that produced the highest number of net additional dwellings was Campsie (25 percent of all dwellings). This fits with the significance of Campsie being the main town centre and commercial hub of the area. The suburbs ranked second and third were Roselands (11 percent) and Canterbury (10 percent).

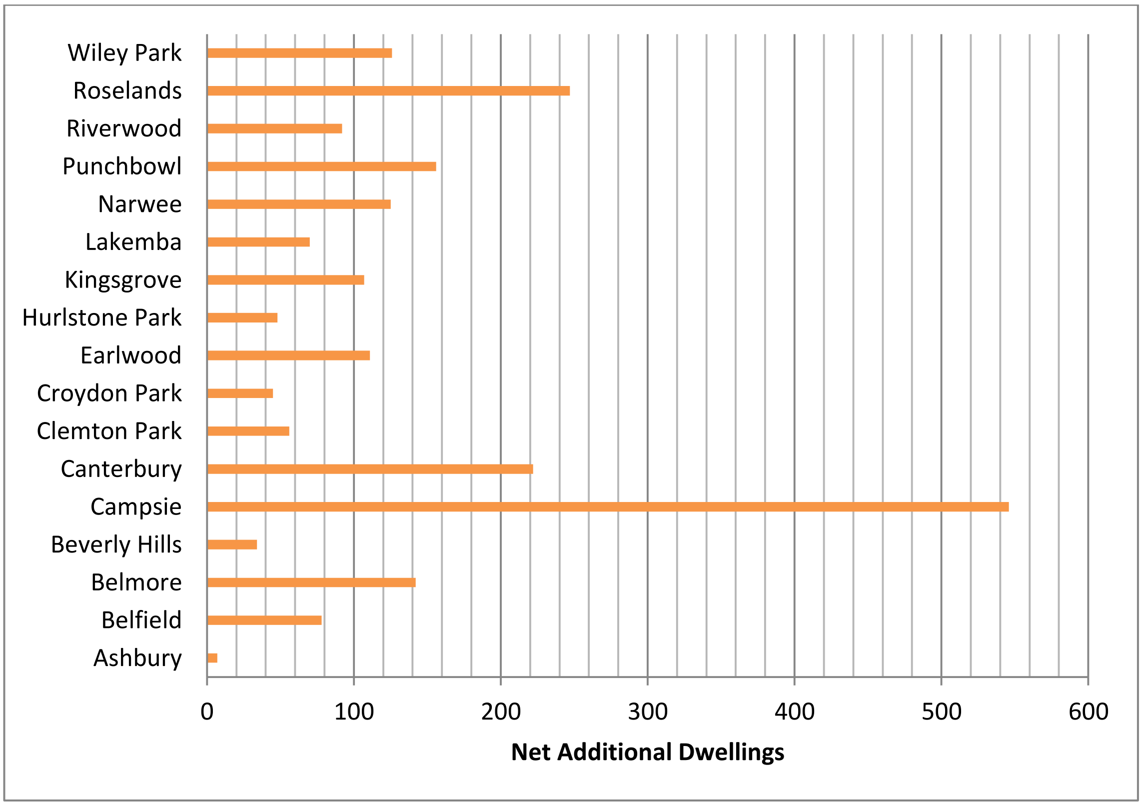
The area with the least number of net additional dwellings was Ashbury (<1 percent). This reflects the R2 Low Density Residential zone and heritage controls that apply to the area. Similarly, low shares of net additional dwellings were recorded within Hurlstone Park (2 percent) and Croydon Park (2 percent), despite the fact that Croydon Park has significant areas of R4 zoned land (albeit with a low floor space ratio maximum).

Despite Beverley Hills (2 percent) being the second lowest producer of net additional dwellings within Canterbury LGA between 2004 and 2012, this is considered to largely be as a result of the land area available within Beverly Hills on the Canterbury LGA side with a large golf course consuming a sizable amount of this area limiting development potential. Further, Beverly Hills railway station is situated within Hurstville Council along with the vast majority of land immediately surrounding the railway station leaving little to be developed within that portion of Beverly Hills situated within Canterbury LGA.



Source: Canterbury City Council

Figure 5.6 Location of developments completed between Jan 2004 and Dec 2012



Source: Canterbury City Council

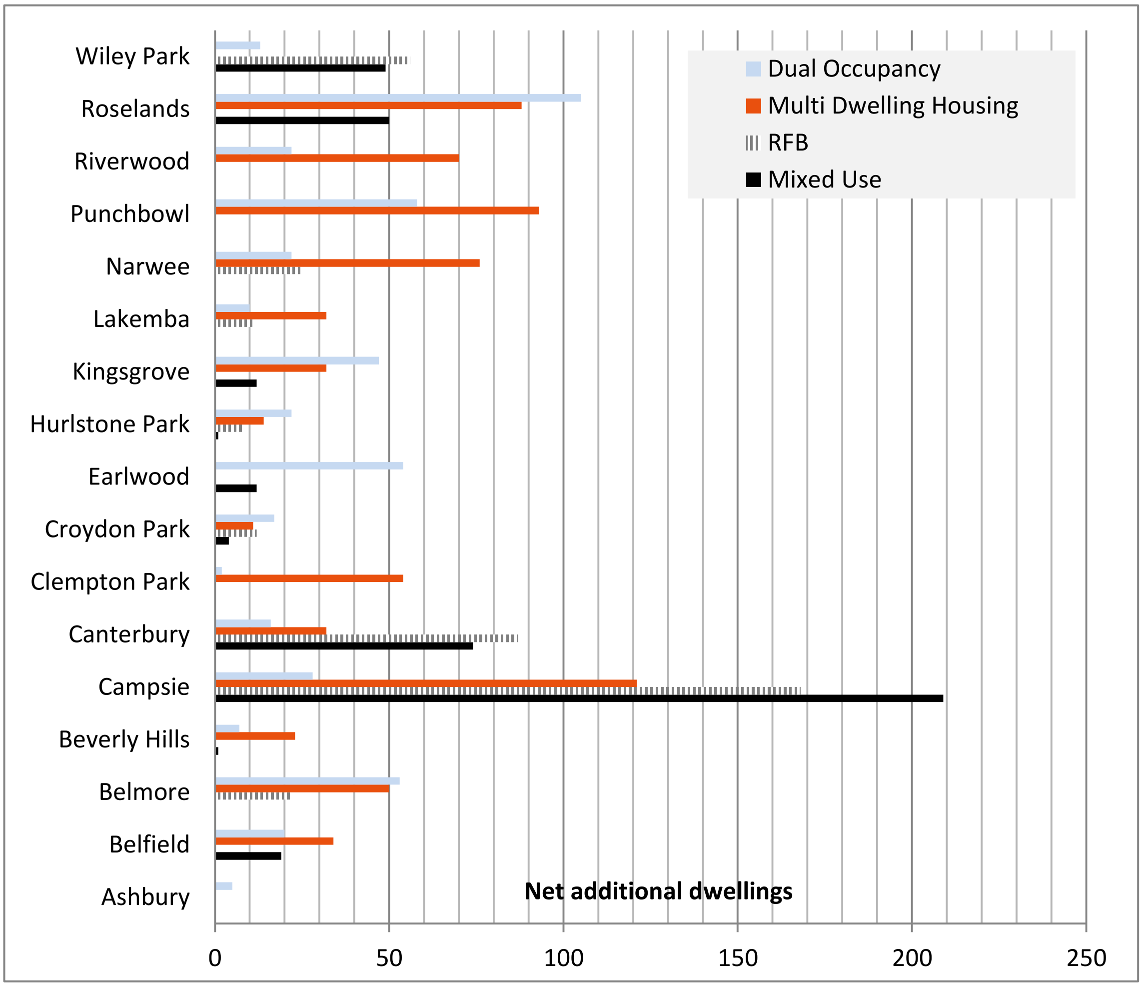
Figure 5.7 Net additional dwellings by suburb - Canterbury LGA - January 2004 to December 2012

As identified in **Figure 5.4**, the top four net additional dwelling development types within Canterbury LGA up to 2012 were (in descending order) multi dwelling housing, dual occupancies, mixed use, and residential flat buildings. An analysis of each suburb by these top four development types has been undertaken and the results are shown in **Figure 5.8**.

Mixed use development was the dominant new housing form in Campsie. Other suburbs to record a significant new housing through mixed use development were Canterbury, Roselands and Wiley Park.

Similarly, the top suburbs for residential flat buildings were (in descending order) were Campsie, Canterbury and Wiley Park.

Multi dwelling housing has been developed across the LGA consistent with the broad spread of R3 zoned land. Multi dwelling housing was the first or second contributor to total dwelling growth in each of the following suburbs: Belfield, Belmore, Beverly Hills, Clemton Park, Hurlstone Park, Kingsgrove, Narwee, Punchbowl, Riverwood and Roselands. Surprisingly, the data indicated that no multi dwelling housing had been constructed within Wiley Park. The data indicated that developments within this area consisted mostly of mixed use developments and residential flat buildings with a handful of dual occupancy housing development despite having a large amount of land zoned R3 permitting multi dwelling housing developments.



Source: Canterbury City Council

Figure 5.8 Net additional dwellings by suburb and development type – Canterbury LGA – 2004 to 2012

Dual occupancy developments in low density areas such as Earlwood, Ashbury, Croydon Park and Hurlstone Park rank as the number one development type for producing net additional dwellings within these areas. Across the Canterbury LGA, Roselands is ranked first with 21 percent of the all dual occupancy net additional dwellings being constructed within this suburb. The suburbs of Punchbowl, Earlwood, Belmore and Kingsgrove were also significant contributors of total dual occupancy developments.

5.3 Theoretical remaining dwelling capacity assessment

5.3.1 Purpose

An assessment of remaining residential development opportunities under the current planning framework was undertaken as part of the RDS.

The purposes of the assessment was to answer the following questions:

- What are the remaining opportunities for different types of dwellings throughout Canterbury LGA's housing sub-precincts?
- Is there a need to adjust residential development controls so as to enable the 2031 subregional dwelling targets to be met?

5.3.2 Methodology

The analysis was undertaken using the mapping resources of the Council and included the following methodology.

For each residential zone identify the remaining number of allotments and the remaining land area that is potentially capable of accommodating further dwellings.

Land that was not considered capable of accommodating further dwellings were sites with the following characteristics:

- Non residential development, such as retail or commercial development
- Heritage items and heritage conservation areas
- Multi-dwelling housing, residential flat buildings (both low and high rise)
- Strata subdivided land

The remaining land was considered potentially developable land.

At this point of the analysis, sites with narrow widths or street frontages were not excluded from consideration because such sites have the potential to be consolidated with adjoining land.

For the potentially developable land, a simple assumption was made that the potential development form would be the most dense dwelling form permissible in the particular zone. That is,

- The highest density development form permissible in the R2 zone would be dual occupancy development.
- The highest density development form permissible in the R3 zone would be town house / villa development.
- The highest density development form permissible in the R4 zone would be residential flat building development

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The theoretical remaining dwelling capacity was derived by dividing the potential development areas in each zone by the average site area of the highest density development form in the respective zone.

The following average site areas per dwelling type (that was based on sample DAs reviewed as part of the preparation of the RDFM feasibility model) were assumed:

- Residential flat building dwellings — 140m^2 site area / dwelling[31]
- Town house and villa dwellings — 280m^2 site area / dwelling
- Dual occupancy dwellings — 300m^2 site area / dwelling

The results were then adjusted to exclude replacement dwellings. For the purpose of this broad analysis it was assumed that all existing discreet land parcels were occupied by a single dwelling.

The results for the R2, R3 and R4 zones were augmented with information provided from Council officers on remaining dwelling potential in other areas not subject to the generic controls in these zones. That is:

- Canterbury Road Corridor (i.e. shop top housing in the B2 and B5 zones[32])
- Town centres, including Canterbury Town Centre (i.e. shop top housing in the B2 zone as well as renewal of non residential uses on R4 zoned land)
- Sunbeam site (i.e. remaining development capacity under the Concept Plan approval)
- Riverwood North (i.e. redevelopment / renewal of already-developed Department of Housing land)

5.3.3 Theoretical capacity results

The assessment identified that Canterbury LGA has a theoretical capacity for a further 28,000 dwellings. The breakdown of these opportunities by zone / area is shown in **Table 5.4**, over page.

Around three-quarters of the opportunities are located in the R3 and R4 zone, as shown in **Figure 5.9**, over page.

A map showing location of potentially developable land throughout the Residential zones is shown as **Figure 5.10**.

[31] Note that development greater than 3 storeys commonly yields much higher site densities of around 80m^2 site area per dwelling. Opportunity sites for 3 storey + development are limited by the prevailing zoning – i.e. only a small proportion of R4 zoned land currently allows these higher buildings. A conservative approach of using the 2-3 storey average site density was used for the purpose of estimating theoretical dwelling capacity for all residential flat buildings.

[32] R4 zoned land opportunities

Table 5.4 Summary of theoretical additional dwelling potential

Location	Theoretical additional dwelling capacity	Note
R4 zone	6,184	1
R3 zone	15,110	2
R2 zone	283	3
Canterbury Road Corridor	1,953	4
Town centres	3,379	5
Sunbeam site (remaining)	622	6
Riverwood North	615	7
Total theoretical capacity	**28,146**	

Notes:

1. Based on there being 119.85ha of potentially developable land comprising 2,377 sites
2. Based on there being 925.38ha of potentially developable land comprising 17,939 sites
3. Based on there being 43.22ha of potentially developable land comprising 566 sites
4. Figure contained in Draft Canterbury Development Contributions Plan 2013
5. Figure contained in Canterbury Town Centres Car Parking Strategy
6. Figure included in Clemton Park Village VPA Assessment, prepared by GLN Planning, March 2013
7. Figure from Part 3A and DA approvals

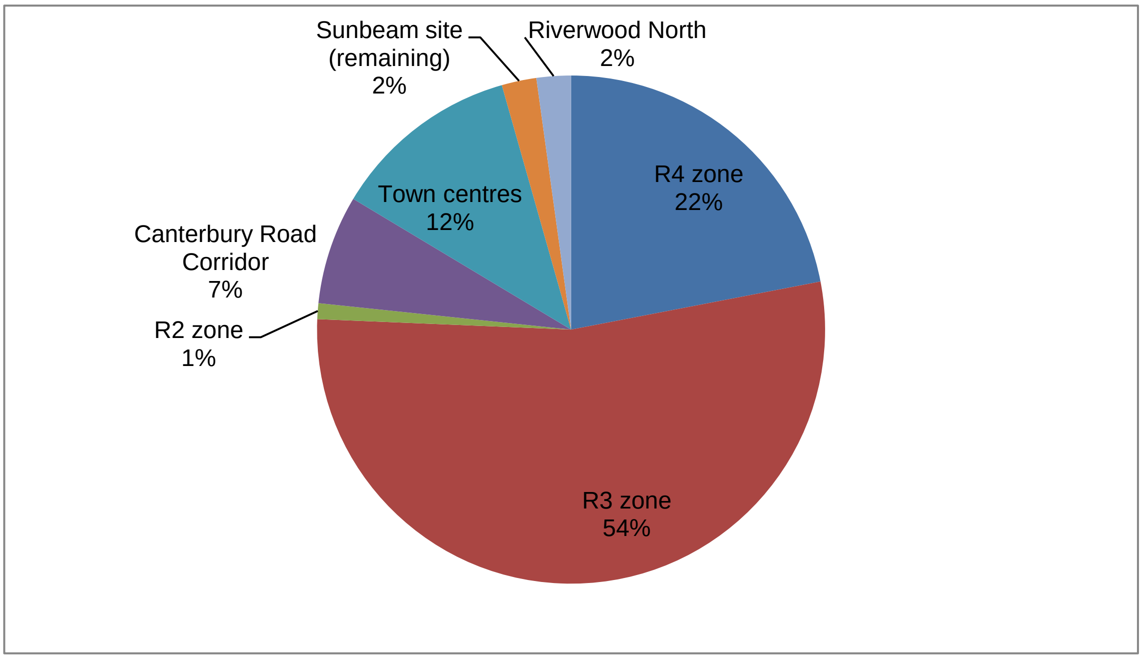

Figure 5.9 Summary of theoretical additional dwelling potential

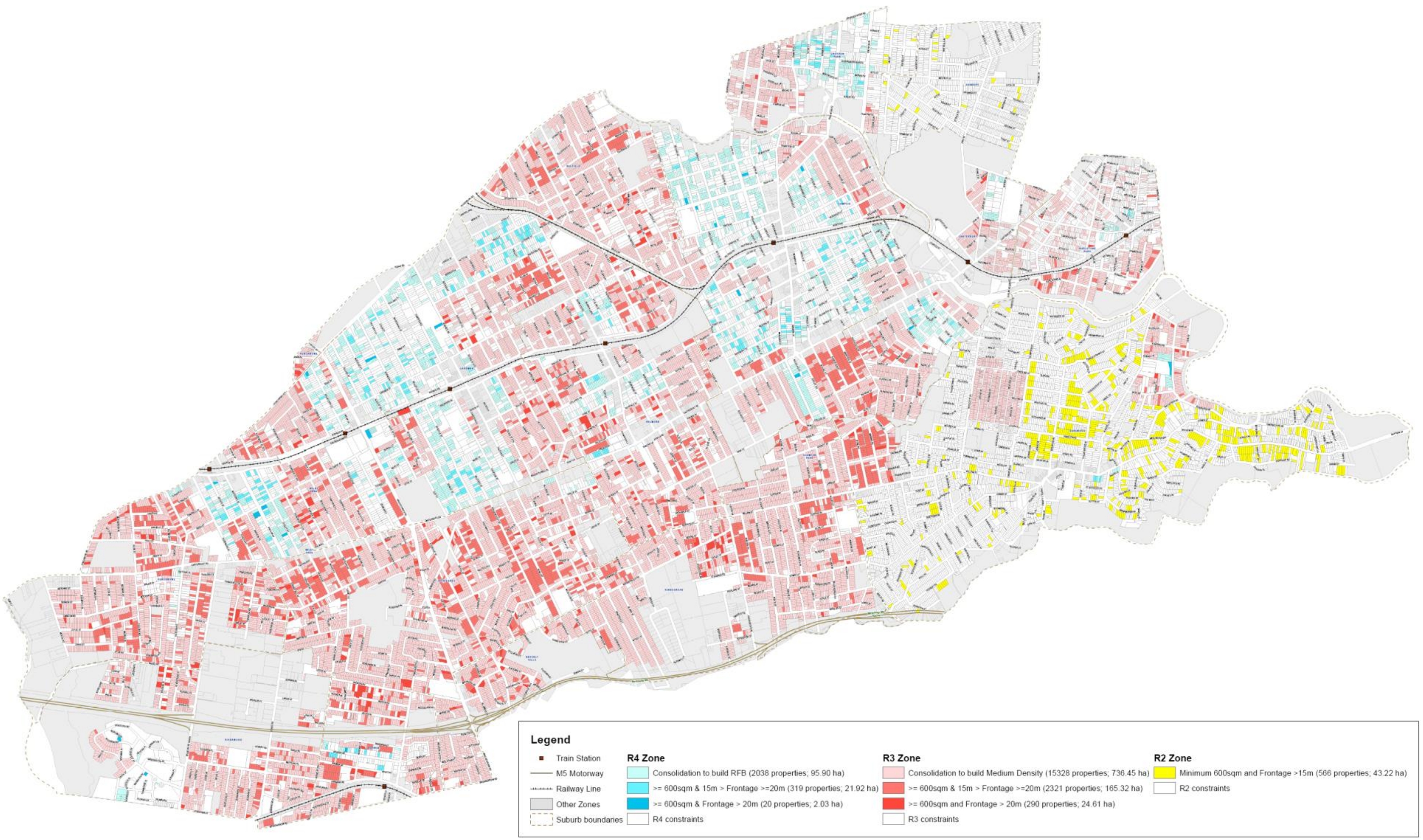

Figure 5.10 Potentially developable R2, R3 and R4 zoned land - Canterbury LGA

Limitations of the analysis

The theoretical dwelling capacity results should be treated with caution.

A significant portion of the total potentially developable land will never be developed in the strategic planning horizon. This is due to many factors, such as

- owners unwilling to sell or redevelop,
- market preferences to maintain existing housing,
- highest and best use being a low density building form,
- delays and practical difficulties associated with assembling multiple parcels to create viable development sites,
- uneconomic to redevelop land due to fluctuations in economic cycles and overly-restrictive planning controls.

5.3.4 Development-ready sites

Most of the theoretical dwelling capacity however assumes the consolidation of individual parcels to create a viable development sites.

A further analysis was undertaken to determine what part of the theoretical capacity comprises dwellings on sites that could be developed in the near future. The assessment was first undertaken on the Residential zoned land.

Development-ready sites were sites that satisfied the minimum frontage requirements applying to higher density development form that could be developed in the zone. That is:

- Potentially developable R4 sites with a frontage of at least 20 metres were assumed to be development-ready for residential flat buildings.
- Potentially developable R4 sites with a frontage of more than 15 metres but less than 20 metres were assumed to be development-ready for townhouses.[33]
- Potentially developable R3 sites with a frontage of at least 20 metres were assumed to be development-ready for town houses.
- Potentially developable R3 sites with a frontage of more than 15 metres but less than 20 metres were assumed to be development-ready for dual occupancies.
- Potentially developable R2 sites with a frontage of at least 15 metres were assumed to be development-ready for dual occupancies.

Additional to these areas, certain other sites were added to the development-ready list, as they satisfied one or more development-ready criteria. For example, the development had already commenced construction, substantial approvals had already been issued, or there was known developer interest.

Based on these very broad assumptions, the analysis identified that there were development-ready opportunities for about 7,100 dwellings, or 25 percent of the total theoretical capacity.

Data on development-ready sites are shown in **Table 5.5** and **Figure 5.11**.

[33] Note that this assumes a relaxation of current requirements for townhouses in the R4 zone

Table 5.5 Development-ready dwelling opportunities

Zone / area	Net additional dwellings
Residential zones	
R4 zone - residential flat building dwellings	125
R4 zone - town house dwellings	464
R3 zone - town house dwellings	589
R3 zone - dual occupancy dwellings	1,161
R2 zone - dual occupancy dwellings	283
Total for residential zones	*2,621*
Other areas	
Canterbury Town Centre	1,095
Other town centres	780
Sunbeam site (remaining)	622
Riverwood North	615
Punchbowl RSL	146
Canterbury Road corridor	1,250
Total other areas	*4,508*
Total development-ready sites	**7,129**

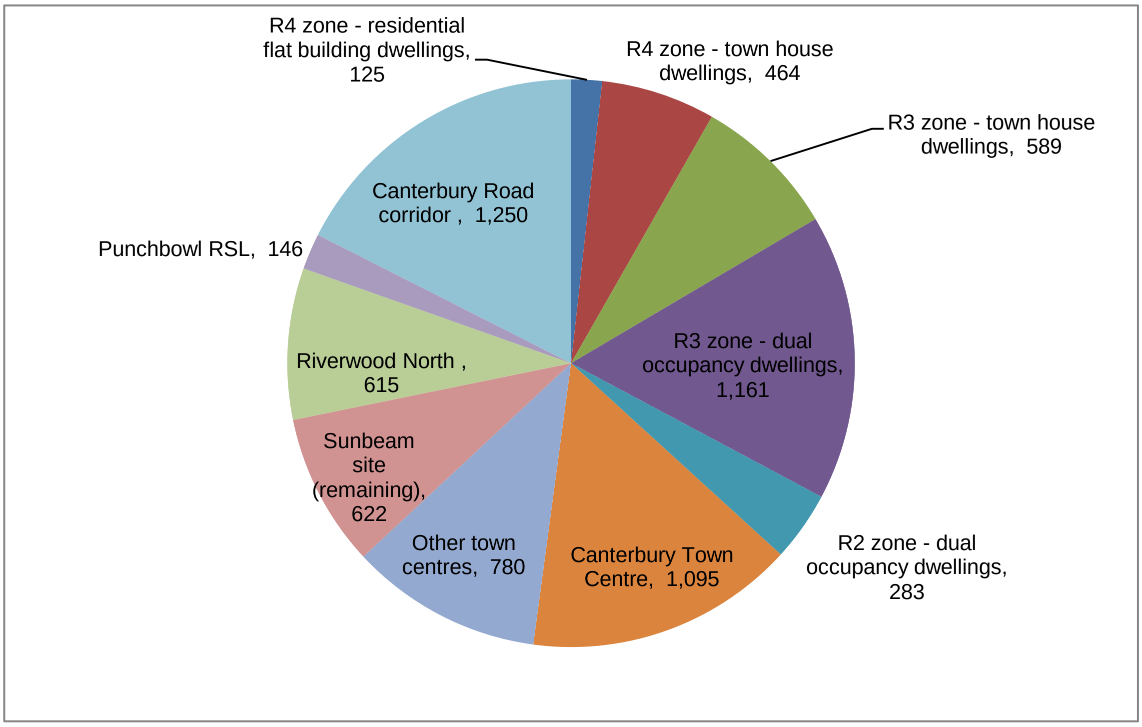

Figure 5.11 Development-ready dwelling opportunities

There are further potential redevelopment sites that have recently been rezoned, or where rezoning is currently under consideration. They include sites the subject of a Planning Proposal or that are in the early stages of being considered for Planning Proposals. These sites relate to the key urban structure themes discussed in in Section 2.3 of the RDS. Details of the sites are included in **Table 5.6**.

Table 5.6 Potential development sites (not development-ready)

Potential development site	Potential Net Increase in Dwellings
591-605 Canterbury Road, Belmore	41 dwellings
436 and 466-454 Canterbury Road, Campsie	23 dwellings
30 Travenar Street, Ashbury	To be determined
754-794 Canterbury Road and 1A Trafalgar Street, Belmore	120 dwellings
Close Street Canterbury (Bowling Club site)	303 dwellings
Civic Centre site, Campsie	503 dwellings
39-53 Quigg Street, Lakemba	60 dwellings

5.3.5 Key conclusions

Key conclusions that can be drawn from the above analysis include the following:

- There is significant dwelling potential remaining, both in terms of maximum long term potential and short term development-ready and potential development sites. Even if only half of the theoretical potential (or 14,500 dwellings) was assumed to be a realistic residential development 'bank', there would be about 55 years supply based on the current annual average housing target of the LGA.[34]
- There are substantial opportunities remaining in the R3 zoned land, however while ever the minimum site frontage remains 20 metres for medium density forms of development, those opportunities are more likely to be realised in terms of dual occupancy dwellings. This reflects recent experience (refer Section 5.2).
- Short term realisation of dwellings in the R4 zoned land would be significantly enhanced by Council agreeing to townhouse development on sites with limited frontage (i.e. between 15 and 20 metres).
- The major sites / precincts opportunities of Canterbury Town Centre and other town centres, Riverwood North, Sunbeam site and the Canterbury Road corridor are major short term housing creation opportunities for the LGA, representing about half of the development-ready sites. These sites will make a major contribution to achieving housing targets. The potential contribution of these and future 'catalyst' sites highlights the importance of having several of these sites available for housing creation at any one time.

[34] 263 dwellings per annum

5.4 Summary

The take-up of new housing in Canterbury LGA fluctuates year-on-year, but dwelling creation over the last decade or so has remained solid, with an average of 246 dwellings per year. This result is generally in line with the housing targets that have been set for the area.

The predominant housing types that have been created in recent times have been dual occupancies and town houses, yet all styles have been added to the housing stock. The recent predominance of lower density housing creation may be the result of many factors including the relative availability of sites, the GFC aftermath and the difficulties for higher tier developers to secure finance, and also the fact the most readily available development opportunities are for low and medium density housing forms.

There is substantial capacity for further dwellings to be created in the area. A broad analysis of recent approvals and available sites under the current planning controls indicates that there are opportunities for a further 28,000 dwellings, with 7,100 of these representing ‘development-ready’ opportunities. This dwelling ‘bank’ will be sufficient to enable the LGA to meet its current target of 7,100 extra dwellings by 2031. That is, with about 2,200 already provided, there are enough development-ready sites to meet the balance of the requirement.

However, the Draft Metro Strategy has signalled that around 345,000 dwellings will be needed across Sydney infill areas between 2011 and 2031. This means that Canterbury’s current annual target is likely to increase.

6.0 Planning framework informing consideration of future housing opportunities

Section 5 of the RDS identified that the Canterbury LGA housing target is currently 263 dwellings per annum, which extrapolates to the LGA needing to provide a further 5,260 dwellings for the 20 period to 2031.

The State Government has been in the process of reviewing each LGA's target for some time now, and it is expected that an updated target for Canterbury LGA will be determined as part of a new South Subregional Delivery Strategy due to be completed over the next few years.

The Government has however through its Draft Metro Strategy issued updated targets at the subregional level that imply that Canterbury's annual dwelling target will increase significantly. It is impossible to say what the precise target will be until the subregional planning process is completed.

There is good evidence to suggest that the current Canterbury LGA dwelling targets will be met over the next twenty years. That is:

- Average annual dwelling creation over the 2004-2012 period was 246 dwellings – just less than the average annual targets of 263. These dwellings were created at a time of significant slowdown in development activity precipitated by the GFC in 2008.
- There is remaining theoretical dwelling potential for Canterbury LGA of about 28,000 dwellings, with opportunities for further dwellings across all zones that currently permit dwellings. These opportunities are across the full spectrum of dwelling types - including residential flat buildings, multi-dwelling housing and dual occupancy dwellings - and across all suburbs in Canterbury LGA.
- There are sites that are 'development-ready' for around 7,100 dwellings.
- Affordable housing, seniors housing, boarding houses and secondary dwelling development opportunities remain permissible under the Affordable Rental Housing SEPP and the Seniors Living SEPP. These policies are likely to continue in the State Planning Policies under the proposed new planning legislation.
- Social housing opportunities are likely to continue. The Department of Housing's housing stock is strongly represented in Canterbury LGA, and the Department is continuing a program of housing renewal including the provision of new dwellings

On these facts alone there appears to be no pressing need to adjust the planning controls applying to housing in Canterbury LGA. Canterbury LGA will likely continue to provide a wide range of housing types for a range of sub-markets, well into the future.

However there are factors / circumstances that suggest that adjustments to the planning framework will be desirable and even necessary. These factors include:

- Correcting anomalies in planning controls.
- 'Catalyst' sites. Some large sites (either individually or grouped with other sites) may no longer be suitable for the purpose they are currently zoned.
- Despite there being many development-ready sites, few of these are large sites that would attract Tier 1 developers.
- Fine tuning existing controls. Achieving greater efficiencies out of the land that is zoned for medium and high density housing.

- Alignment of local and with State Government planning policies and infrastructure decisions. For example, increased subregional housing targets.

The RDS therefore includes tools and recommendations that will facilitate the review and updating of residential development planning controls.

The proposed framework comprises two parts:

- Strategic Directions
- Decision-making framework for planning proposals

6.1 Strategic directions

Planning decisions regarding residential development in Canterbury LGA should be consistent with the following:

1. Housing planning decisions should accord with State and metropolitan planning directions set by the State Government.
2. Ensure that the suite of zoning and other development controls support viable opportunities for a full range of housing types, sizes and tenures throughout the Canterbury LGA. There should be adequate opportunities for Tier 1 developers to provide housing product in the LGA.
3. Housing with the highest densities (that is, high rise residential flat buildings or apartments and shop top housing) should be located in and adjacent to centres, and within the walk catchment of major transport nodes.
4. Fine-tune planning controls to ensure that areas that are currently set aside for medium and high density housing are efficiently developed within amenity constraints.
5. Apply a consistent approach to requests to adjust the zoning or controls applying to residential development land.
6. Infrastructure contributions plans should be regularly updated to ensure the increased residential growth can be supported with the necessary infrastructure.

In undertaking this RDS, GLN Planning has identified the following actions that the Council / State Government should undertake in pursuit of the strategic directions:

6.1.1 Monitoring

The RDS has been informed by records of dwelling approvals, commencements and completions collected by Council since at least 2004. It is important that this data set continue so that there is good information on the types and sizes of new dwellings is available to inform potential adjustment of planning policies in the future.

6.1.2 Tier 1 development sites

The LGA offers many opportunities for lower tier builders, but larger sites that would attract the interest of Tier 1 developers are few. Tier 1 developers and builders will only be attracted to Canterbury LGA if sufficiently large sites are available for development.

The availability of Tier 1 sites is important for the future development of the LGA's housing, whether or not LGA housing targets are increased. Tier 1 sites provide the opportunity for a range of housing types and dwelling sizes in the one precinct over an extended time period. The quality usually associated Tier 1 developments means they have the capacity to catalyse redevelopment in the wider area surrounding the site, thus leading to more housing redevelopment opportunities.

Larger developments also have the potential to provide integrated infrastructure, housing and community outcomes and may be large enough to support new centres – for example the new neighbourhood centre and amenities that will be developed on the former Sunbeam site.

Given that the LGA is largely fully developed, Tier 1 sites will mainly emerge through existing use of large sites becoming redundant. Rezoning of these sites to facilitate housing will be appropriate where the site is not needed, nor likely to be needed, for its current zoned purpose. Care will need to be applied in the case of major employment and industrial site to avoid the permanent loss of lands that otherwise are capable of providing significant employment opportunities.

6.1.3 Housing opportunities in railway station walk catchments

A major focus of the Draft Metro Strategy is to focus new housing in and around centres and public transport infrastructure.

There is currently only a very loose correlation between the availability of public transport and the location of the highest density housing forms. The highest density housing areas may be located on most land north of Canterbury Road, but also may be a long walking distance from a railway station. Conversely there are many locations in the extreme south of the LGA which are close to the Airport / East Hills Line but which are developed for low density detached dwellings.

The prevailing zoning prevents many sites in the south from being developed for residential flat buildings. There are many sites along the Bankstown Line with excellent accessibility that are either under-zoned (i.e. R3 zone) or have not yet been developed for flats because of the need for site consolidation.

In the event that the Canterbury LGA, in order to meet metropolitan planning outcomes, is required to accommodate significantly increased housing targets, the railway station walk catchments should be the subject of a detailed housing opportunity and planning assessments.

The assessments should at least cover the following:

- The walk catchments of the railway stations located in or adjacent to the LGA. Canterbury LGA contains the walk catchments of the following stations: Hurlstone Park, Canterbury, Campsie, Belmore, Lakemba, Wiley Park, Punchbowl, and Narwee. The walk catchments of stations in immediately adjoining LGAs could also be included.
- This should be carried out in conjunction with the Department of Planning and Infrastructure and relevant adjoining councils.
- Investigate housing opportunities under the current zoning, and potential additional housing opportunities in keeping with the greater accessibility that is afforded to these locations.
- Investigate the economic viability of adjusting planning controls that result in increased development potential.
- Review economic and social infrastructure capacities and opportunities / requirements to augment this infrastructure so as to sustain a greater local population. For example, traffic facilities, pedestrian and cycle facilities, parks, community centres.
- Where significant extra dwelling potential is likely to be available, prepare individual master plans for the walk catchment identifying building envelopes and infrastructure needs and costs.

6.1.4 Use the RDFM tool

The RDFM allows any parcel of Residential zoned land to be tested to determine whether prevailing planning controls applying to that land are likely to produce an economically viable development.

Council should apply the RDFM, when required:

- to assist in reviewing the merit of other future rezoning submissions and planning proposals
- to determine where planning controls are perceived to not fit with economic fundamentals of developing particular sites or precincts
- to test the economic impact of any proposed adjustments to planning controls - for example, basement parking requirements, FSR, or section 94 contributions

6.1.5 Adjust controls to allow efficient residential development

Council should investigate / evaluate the following matters so that existing Residential zoned land is efficiently developed:

- Adjust planning policy to enable residual isolated underdeveloped land in R4 zones to be redeveloped. For example, allow both multi dwelling housing and lower scale residential flat buildings (up to 2 levels above ground) with basement parking on isolated sites within the R4 zone that have a frontage of 15 metres, or greater.
- Review the prohibition of basement parking within R3 zoned land. Basement parking provides developers with further options for the design of their developments. While it is provided at a higher cost per space than at-grade parking, there is not considered to be any overwhelming justification to prohibit this form of development with relevant controls already provided for within the DCP to address basement parking for multi dwelling housing and to suitably break up the development (i.e. building separation controls, setbacks, deep soil areas, maximum dwelling floor areas, etc.).
- Review the controls relating to residential flat buildings within the DCP to ensure they are aligned with SEPP 65 to provide consistency between policies. SEPP 65 requires a consent authority to take into consideration *Residential Flat Design Code* (2002) (**RFDC**) published by the Department of Planning and Infrastructure which provides guidelines for the design of any residential flat building. Where the RFDC provides design criteria in relation to a specific planning control, it is recommended that the DCP refer to the controls provided for within the RFDC rather than overlaying an additional set of controls (e.g. size of private open space and building setbacks and separation)
- Consider the deletion of FSR controls for residential flat building sites on R4 zoned land where the site area exceeds 3,000m^2 and the site frontage exceeds 50 metres; and use the DCP / SEPP 65 to direct quality design outcomes. These guidance documents include design controls relating to building height, site coverage, setbacks, provision of parking, landscaping, open space etc. which all limit the overall development potential of a site; whereas the FSR control does not contribute to good design outcomes.
- Allow the market to determine the land use mix within the Canterbury Road corridor by permitting residential flat buildings with consent in the B5 and B6 zones. This recommendation arose out of the assessment of LEP and other submissions from owners of land along the corridor (refer **Appendix C**).
- Rezone sites where the existing or previous use of the land has become redundant, and the land is not required for the purposes for which it was zoned.

6.2 Decision-making framework for planning proposals

6.2.1 Overview

The decision making framework is a tool to enable the Council to assess and determine specific requests of developers and owners of land to adjust the prevailing residential planning controls applying to specific land.

The decision-making framework responds to Strategic Direction 5: 'Apply a consistent approach to requests to adjust the zoning or controls applying to residential development land'.

The framework is shown in **Figure 6.1**.

Discussion of the components of the framework follows the figure.

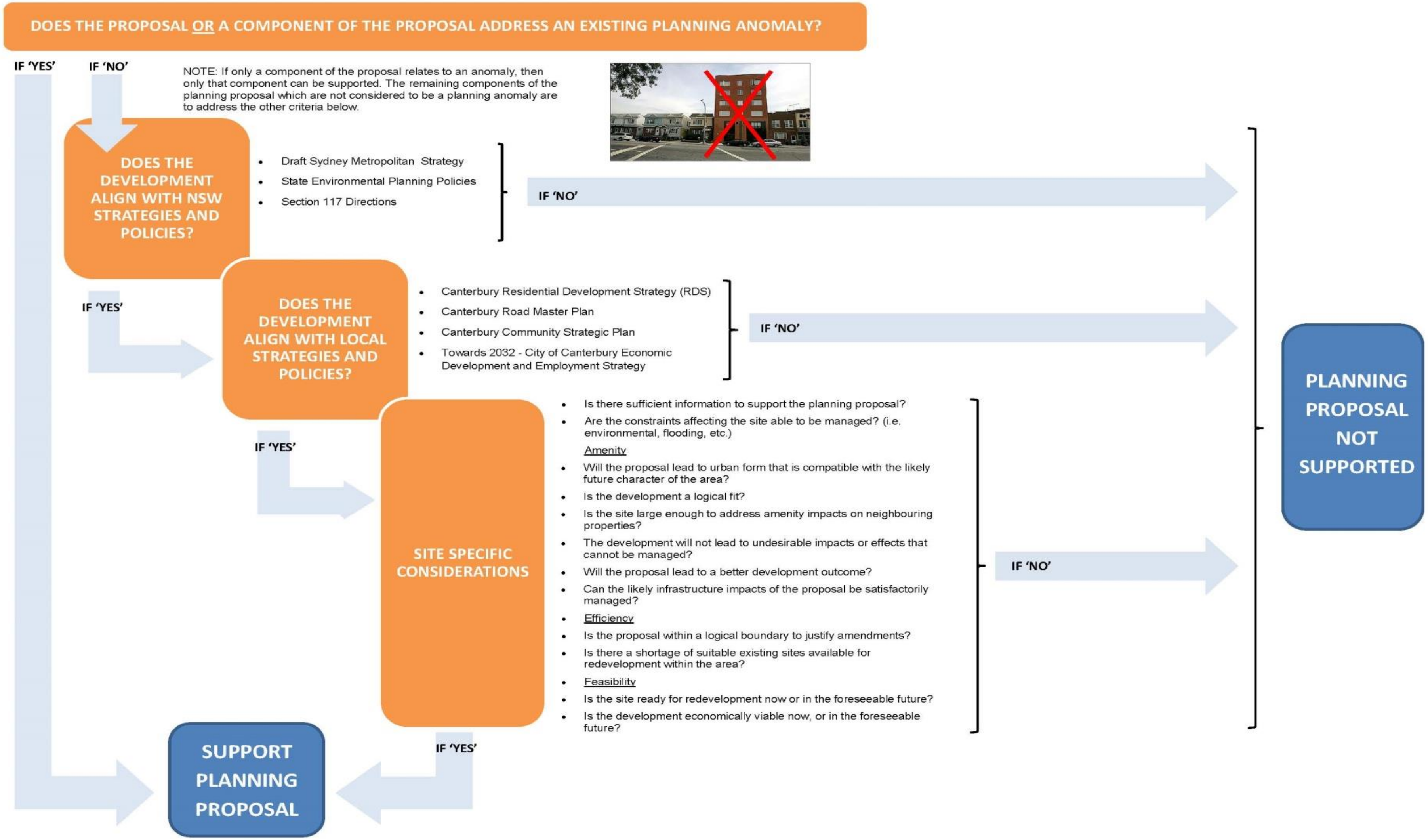

Figure 6.1 Decision-making framework for planning proposals

6.2.2 Anomalies

If the planning proposal relates to an anomaly in the controls, then the proposal should be supported. Examples of zoning or planning control anomalies include the following:

- Where a zone boundary has been arbitrarily positioned and where adjustment of that boundary in accordance with the planning proposal would be logical (for example, one property in the street having a particular zoning and the rest of the street having a separate zoning with no underlying reason).
- Where the maximum height control for the land does not accord with the maximum FSR control.

If only a component of the planning proposal relates to an anomaly, then only that component can be supported. The remaining components of the planning proposal which are not considered to be a planning anomaly are to address the other criteria below.

If the planning proposal is not merely to address a planning anomaly, then the proposal is to be assessed against a three-tiered 'waterfall' of planning considerations. The considerations are:

- Does the development align with NSW Government strategies and policies?
- Does the development align with local strategies and policies?
- Site specific considerations

6.2.3 Alignment with NSW Government strategies and policies

The key considerations are:

- Metropolitan strategy
- NSW planning policies (SEPPs and section 117 directions)

The key directions laid out in the Draft Metro Strategy are discussed in Section 4.1.3. In summary, they are:

- Provide for economically viable development opportunities
- Provide housing in locations in or near centres,
- Locate housing opportunities to take advantage of existing and planned public transport infrastructure (i.e. the LTTMP's Strategic Transit Network)
- Ensure a well-located supply of industrial lands
- Resist rezoning of employment and industrial land where the proposal is inconsistent with the Industrial Lands Strategic Assessment Checklist

The NSW planning policies likely to be most relevant to planning proposals involving residential development opportunities are discussed below:

Potentially relevant SEPPs:

- SEPP 32
- SEPP 65
- Codes SEPP
- Affordable Rental Housing SEPP
- Seniors Housing SEPP

Potentially relevant Local Planning Directions:

- 1.1 Business and Industrial Zones
- 2.3 Heritage Conservation
- 3.1 Residential Zones
- 3.4 Integrating Land Use and Transport
- 4.1 Acid Sulfate Soils
- 4.3 Flood Prone Land
- 7.1 Implementation of the Metropolitan Plan for Sydney 2036

If any planning proposal is inconsistent with the highest level of planning policy, then the proposal should not be supported. If the proposal is consistent, then it should proceed to the next tier of assessment.

6.2.4 Alignment with local strategies and policies

The local policies and strategies that are most relevant to decision-making about residential development are discussed in detail in Section 4.2.1, and are:

- Canterbury Residential Development Strategy (this report)
- Community Strategic Plan
- Economic Development and Employment Strategy
- Canterbury Road Master Plan

If any planning proposal is inconsistent with these local policies and strategies, then the proposal should not be supported. If the proposal is consistent, then it should proceed to the next tier of assessment.

6.2.5 Site specific considerations

If the proposal meets the planning policy tests above, then the final tier of consideration is whether the proposal meets the following site-specific considerations (where they are relevant):

The considerations are as follows:

General

- Is there sufficient information to support the planning proposal?
- Are the constraints over the site able to be managed? (i.e. environmental, flooding, etc.)

Amenity

- Will the proposal lead to urban form that is compatible with the likely future character?
- Is the development a logical fit?
- Is the site large enough to address amenity impacts on neighbouring properties?
- The development will not lead to undesirable impacts or effects that cannot be managed?
- Will the proposal lead to a better development outcome?
- Can the likely infrastructure impacts of the proposal be satisfactorily managed?

Efficiency

- Is the proposal within a logical boundary to justify amendments?
- Is there a shortage of suitable existing sites available for redevelopment within the area?

Feasibility

- Is the site ready for redevelopment now or in the foreseeable future?
- Is the development economically viable now, or in the foreseeable future?

If in relation to any planning proposal, the answer is ‘No’ to any relevant site-specific consideration, then the proposal should not be supported.

7.0 Assessment of LEP and other submissions

The concluding section of the RDS deals with submissions regarding residential development that were made in relation to the Canterbury LEP 2012.

The assessment and recommendations in relation to the sites the subject of the submissions was undertaken in accordance with the planning framework discussed in Section 6.

7.1 Background

It was reported in Council's meeting on 22 November 2012 that a residential development strategy be prepared which shall also include the review of submissions made to the exhibition of Canterbury LEP 2012.

The submissions were categorised into three categories including A, B or C:

- 'Category A' LEP submissions were sites that were supported and able to proceed as an LEP amendment as the proposed changes were discreet and had little or no strategic implications. Category A submissions have since been advanced through a Planning Proposal.
- 'Category B' LEP submissions required further assessment as part of the RDS.
- 'Category C' LEP submissions were initially not supported for any further consideration. Council later resolved to include Category C submissions into Category B for further assessment through the RDS.

There were four sub-categories of Category B submissions, that is:

- Sites involving rezoning of residential / business land
- Sites involving rezoning of employment lands
- Sites involving an increase in density (no zoning change)
- NSW Land and Housing Corporation (Department of Housing)

GLN Planning undertook the following tasks in the assessment of the Category B submissions:

- Inspection of each submission site.
- Prepared maps showing the location, prevailing zoning and planning controls applying to each site.
- Reviewed each written submission.
- Discussed each submission with representative of the parties who prepared the submission, with the meetings held at Council offices.
- Evaluated each submission against the criteria included in the decision-making framework included in Section 6.
- Selectively tested the economic viability of several of the sites using the RDFM tool.

In addition, Council also received a number of submissions following the gazettal of the Canterbury LEP. These submissions were incorporated into this same review process and assessed against the same criteria which have been outlined above.

7.2 Outcomes

The results of the assessment of each submission are included in **Appendix C**.

A summary of the recommendations for each submission site is shown in **Table 7.1**.

Table 7.1 Summary of LEP submissions recommendations

No.	Site	Recommendation
1	Canterbury Road, Una Street, Perry Street and Stanley Street (Submitted on behalf of 443 - 457 Canterbury Road, Campsie)	Rationalise the land uses within the B5 and B6 zones into one zone (and allow residential uses). Allow consolidated B5 / B6 zone to permit solely residential buildings, and not necessarily in mixed use format. Amend the building heights map to 18m, with a step-down in height of 14m for properties fronting Perry Street.
2	878 – 884 Canterbury Road, Roselands	884 Canterbury Road, Roselands (zoned B2 Local Centre): Amend Schedule 1 in relation to the subject site to permit development for the purpose of residential accommodation as part of mixed use development with a retail use along Canterbury Road. No changes to the existing zoning or planning controls relating to 878 - 882 Canterbury Road, Roselands (zoned B5).
3	844 – 854 Canterbury Road, Roselands	Rezone the site so that it allows both business uses consistent with B5 Business Development zone and / or residential flat buildings. As per other B5 and B6 zoned properties along Canterbury Road, rationalise into one zone. Allow consolidated B5 / B6 zone to permit solely residential flat buildings, and not necessarily in mixed use format.
4	677 Canterbury Road, Belmore	Add the B6 Precinct to the *key sites* map to allow mixed use development and to permit residential development. Amend the building height map to 18m over the existing B6 zoned land only. Rationalise the land uses within the B5 and B6 zones into one zone (and allow residential uses).
5	548 Canterbury Road, Belmore	Retain existing B5 Business Development zoning Amend the building height to 21m.
6	Canterbury Road, Thompson Lane, Wilson Lane, Chapel Street, and Canterbury Road, Belmore (Submitted by the owners of 773-777, 781-783 and 787 Canterbury Road)	Retain existing zoning and planning controls.
7	1499 Canterbury Road, Punchbowl	Retain existing zoning and associated planning controls. Review properties along Canterbury Road frontage that are zoned R3 Residential in the event of significantly increased housing targets for the LGA.
8	27 – 33 Brighton Avenue, Croydon Park	Retain existing zoning and planning controls. Review zoning of all IN2 land between Brighton Avenue and Croydon Avenue in the event of significantly increase housing targets for the LGA.
9	11 Harp Street, Campsie	Retain existing zoning and planning controls. Review zoning following the completion of the neighbourhood centre in the Sunbeam site development.
10	93 – 97 Bonds Road, Punchbowl	Retain existing zoning and planning controls.

11	1 – 5 & 9 Alfred Street and 2 – 12 Harp Street, Campsie	Retain existing zoning and planning controls. Review zoning following the completion of the neighbourhood centre in the Sunbeam site development.
12A	33 Tudor Street, Belmore	No change to existing zoning or planning controls. Insert provisions in LEP to enable self-approved Housing NSW developments to be re-developed on-site under the existing use rights provisions as detailed in the Act.
12B	1458 Canterbury Road, Punchbowl	No change to existing zoning or planning controls. Insert provisions in LEP to enable self-approved Housing NSW developments to be re-developed on-site under the existing use rights provisions as detailed in the Act.
12C	40-44 Rosemont Street South, Punchbowl	No change to existing zoning or planning controls. Insert provisions in LEP to enable self-approved Housing NSW developments to be re-developed on-site under the existing use rights provisions as detailed in the Act.
13	278 Burwood Road, Belmore	Retain existing zoning and planning controls.
14	Various properties along Nirimba Avenue, Narwee	Retain existing zoning and planning controls. Review the dwelling opportunities in the 800m walking catchment of each railway station in Canterbury LGA in the event of significantly increased housing targets for the LGA.
15	76 King Georges Road, Wiley Park	No change to existing zoning or planning controls.
16	13-27 Rossmore Avenue, Punchbowl	Retain existing zoning and planning controls. Review zoning following the commencement of the retail development at 1-9 The Broadway (i.e. RSL) site.
17	1083 Canterbury Road, Wiley Park	Retain existing zoning and planning controls. Review Canterbury Road frontage R3 Residential zones in the event of significantly increased housing targets for the LGA.
18	Riverwood Estate	No change to existing R4 zoning. Retain current planning controls until a Master Plan for the whole Riverwood North estate has been approved.
19	300 Lakemba Street, Wiley Park	No change to existing zoning or planning controls.
20	56 Graham Road, Narwee	Support the rezoning of the subject site to R4 High Density Residential. Amend the associated planning controls to adopt a building height of 11.5m and FSR of 0.9:1. Review zoning in the event of significantly increased housing targets for the LGA.
21	60 Lucerne Street, Belmore	Amend the existing zoning to R4 High Density Residential. Amend the existing zoning at 61 Yangoora Road, 67 Lucerne Street, 53A Benaroon Road and 92 Knox Street to R4 High Density Residential (properties shown dashed yellow on the zoning map) Retain the maximum building height of 8.5m for all properties. Amend the maximum FSR for all properties to 0.75:1.
22	134 – 140 Brighton Avenue, Campsie	Support the rezoning of the land to R4 High Density Residential. Retain existing building height and adopt an FSR of 0.75:1.

23	131-133 Victoria Road, Punchbowl	Retain existing zoning and planning controls.
24	26 – 30 Campsie Street and 1 Assets Street, Campsie	Retain existing R4 zoning. Amend the building height to 14m. Amend the FSR to 1.4:1. Review the dwelling opportunities in the 800m walking catchment of each railway station within Canterbury LGA in the event of significantly increased housing targets for the LGA.
25	3 Windarra Street, Narwee	Retain existing zoning and associated planning controls. Review the dwelling opportunities in the 800m walking catchment of each railway station in Canterbury LGA in the event of significantly increased housing targets for the LGA.
26	44, 46, 48 Bayview Avenue and 7 Highcliff Road, Earlwood	Retain existing zoning and planning controls.
27	130 Croydon Street and 981 – 993 Canterbury Road, Lakemba	Retain the existing zoning. Retain existing planning controls over the B2 Local Centre zoned land. Amend the building height over the R4 zoned land to 14m. Amend the maximum FSR control over the R4 zone land to 1.4:1.
28	2 – 14 Sixth Avenue, Campsie	Delete FSR requirement for all R4 High Density Residential zoned sites in excess of 3,000m^2. Review the amenity impacts that would be incurred by increasing maximum building height in this precinct to 24m. Review DCP in relation to residential flat buildings to ensure alignment with SEPP 65.
29	5-9 Croydon Street and 54, 54A and 55 Railway Parade, Lakemba	Retain existing zoning and planning controls.
30	28 – 42 Josephine Street, Riverwood	Rezone site to R4 High Density Residential. Apply a maximum building height of 14m (4 storeys) and 8.5m building height for buildings around the perimeter of the site adjoining with R3 zoned land. Apply a maximum FSR of 1.4:1, or no maximum FSR for development sites in excess of 3,000m^2 and with a minimum 50m frontage.
31	20 Kardella Crescent, Narwee	Retain existing zoning and associated planning controls. Review the dwelling opportunities in the 800m walking catchment of each railway station in Canterbury LGA in the event of significantly increased housing targets for the LGA.

Glossary of terms and abbreviations

Term	Meaning
2010 Metro Strategy	Metropolitan Plan for Sydney 2036
ABS	Australian Bureau of Statistics
Affordable Rental Housing SEPP	State Environmental Planning Policy (Affordable Rental Housing) 2009
CBD	Central business district
Census	Census of Population and Housing
CFP	Community Facility Plan for the City of Canterbury
CP	Contributions plan
CRA	Commonwealth Rent Assistance
DA	Development application
DCP	Development control plan
Draft Metro Strategy	Draft Metropolitan Strategy for Sydney to 2031
FSR	Floor space ratio
GFC	Global Financial Crisis
LEP	Local environmental plan
LGA	Local government area
LTTMP	Long Term Transport Master Plan
LVR	Loan to Value Ratio
MDP	Metropolitan Development Program
National Housing Report	National Housing Supply Council - Key Findings of the 2011 State of Supply Report
NHSC	National Housing Supply Council
NOM	Net overseas migration
NRAS	National Rental Affordability Scheme
RDFM	residential development feasibility model
RDS	Residential Development Strategy
Section 94	Section 94 of the Environmental Planning and Assessment Act 1979 relating to development contributions
SEPP	State environmental planning policy
SRP	City of Canterbury Strategic Recreation Plan

Term	Meaning
Towards 2032	Towards 2032 – City of Canterbury Economic Development and Employment Strategy

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APPENDIX A

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APPENDIX B

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APPENDIX C

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