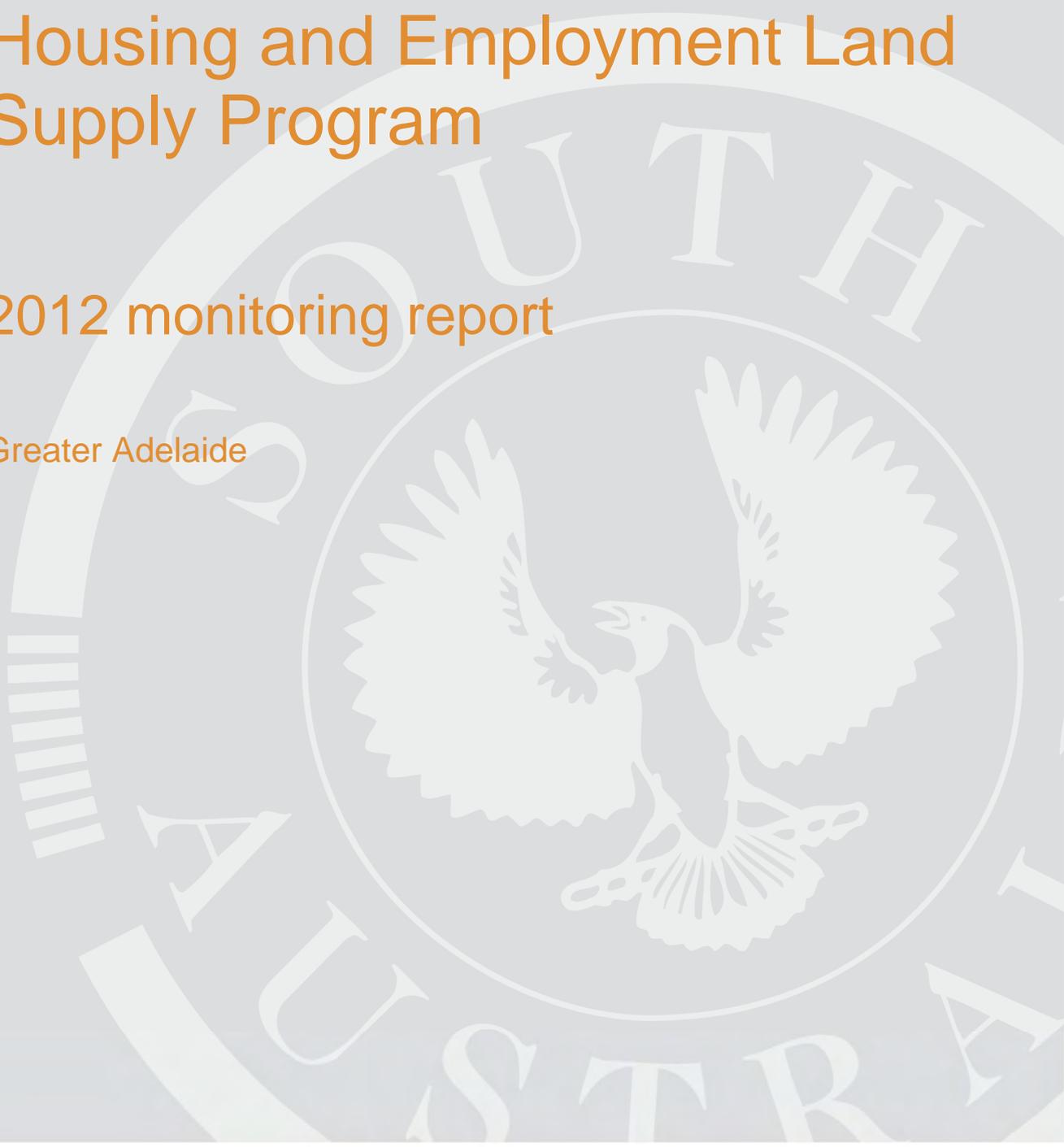




# Housing and Employment Land Supply Program

## 2012 monitoring report

Greater Adelaide



**For further information**

call: (08) 8303 0760  
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**Government of South Australia**

Department of Planning,  
Transport and Infrastructure



# Housing and Employment Land Supply Program

## Greater Adelaide

### 2012 monitoring report

The *Housing and Employment Land Supply Program* is an important tool to deliver the housing and employment targets articulated in *The 30-Year Plan for Greater Adelaide*.

#### For further information

Please visit [www.sa.gov.au/planning/landsupplymonitoring](http://www.sa.gov.au/planning/landsupplymonitoring) or telephone the Department of Planning, Transport and Infrastructure on 08 8303 0760.

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ISBN 978-0-7590-0183-1



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## Executive summary

The Housing and Employment Land Supply Program (HELSP) report is guided by *The 30-Year Plan for Greater Adelaide* (The 30-Year Plan), a major part of the Planning Strategy for South Australia which encompasses the South Australian Government Regions of Northern, Southern, Western and Eastern metropolitan Adelaide, Adelaide Hills, Barossa Light and Lower North, and the areas of Fleurieu and Murray Bridge.

The HELSP supports the achievement of the targets of The 30-Year Plan by:

- ensuring the government can deliver a long-term supply of land required to support housing and jobs growth
- guiding rezoning by councils and the government
- supporting the transition to a new urban form through increased infill development
- aligning land supply with infrastructure planning and investment.

### Population growth

In 2008, Australia's population increased by more than 400,000. This was the highest recorded growth in the nation's population since 1971. South Australia's population growth has followed a similar pattern to that experienced by Australia, but with peak growth occurring a year later in calendar year 2009. This was followed by a major decrease, returning the state to its long-term average growth.

### Residential land

In 2011-12 allotment production in Greater Adelaide dropped to around 5200, 34 per cent lower than the number of allotments produced in 2009-10 and the lowest level in 10 years. Of these, the share of allotments derived from minor developments, driven by infill activity in the established areas and a decline on the fringe, increased from 44 per cent in 2009-11 to 54 per cent in 2011-12.

#### *Land supply and consumption*

Zoned broadhectare land supply has been increased by rezonings at Buckland Park, Mount Barker, Gawler East, Evanston South and Evanston Gardens. Broadhectare land stocks have returned to 2001 levels because of these initiatives. Much of this impact has been in the Northern Adelaide and Barossa Light and Lower North Regions which account for around 50 per cent of the total Greater Adelaide broadhectare land supply.

Over the past two years, broadhectare land consumption was 270 hectares per annum, and is below the average over the last 6 years of 355 hectares. Based on the average consumption of 355 hectares, the current zoned land would provide an estimated 13.5 years of supply.

#### *Growth areas*

Significant progress has been made by the government to supplement the current zoned land supply and achieve the 15 year target. The Playford Projects structure

plan, due for completion in 2013, encompasses the growth areas of Virginia South, Virginia North, Angle Vale and the Playford North extension. Structure planning has also commenced for the Roseworthy growth area.

### *Infill rezoning*

The share coming from major infill projects is expected to increase over time as councils and government work together to identify opportunities to rezone corridors and other strategic sites for higher density development.

The most noteworthy infill initiatives involve:

- Capital City Development Plan Amendment (DPA) which is intended to increase the population capacity of the city centre over the next 30 years to as many as 60,000 people
- the Inner Metropolitan Growth project which proposes to rezone strategic corridors adjacent to the City of Adelaide to achieve the infill growth targets of The 30-Year Plan.

### *Minor infill*

Minor infill is now an important component of the overall land supply. A recent study of demolition, re-subdivision and redevelopment shows that minor infill development currently contributes approximately one third (approx 1900 dwellings) of the net dwelling increase in metropolitan Adelaide each year. This number has been steadily increasing.

### *Balancing housing demand and supply*

Based on the target outlined in The 30-Year Plan, about 130,500 new dwellings will be required within Greater Adelaide in the next 15 years. The existing and forecasted dwelling development provides approximately 14,000 fewer dwellings than this target.

The demand/supply balance on a regional basis indicates that:

- Northern Adelaide will maintain supply over the next fifteen years
- Western, Eastern and Southern Adelaide will have small supply advantages within the next five years but demand will exceed supply beyond that
- Barossa Light and Lower North, Adelaide Hills and Fleurieu will have a supply advantage in the 0 to 10 year period.

## **Industrial land**

In 2012, the greatest concentration of industrial land stocks was in the Northern Adelaide, Barossa Light and Lower North and Western Adelaide regions.

### *Demand and supply*

Between 2002 and 2008, the average consumption rate for industrial land in Greater Adelaide was estimated to be 100 to 110 hectares each year. The 30-Year Plan estimates that industrial employment will increase by 77,600 jobs which will require a land component of 3329 hectares, or an average demand of almost 111 hectares per year.

It is expected that the Western and Northern Adelaide regions will make up to 70 per cent of this demand with Southern Adelaide comprising 19 per cent.

In 2012, the supply of developable industrial land was estimated at 1330 hectares, the bulk of which is within Western and Northern Adelaide. Taking into account the consumption rate of 111 hectares per year, based on The 30-Year Plan employment target, the overall stock will provide approximately 12 years' supply.

The 2012 industrial land survey indicates that in the 2008-12 period demand has been reduced to 302 hectares, which equates to a little over 75 hectares per year.

Despite the fall in consumption, it is important that additional land is made available to achieve the required 15 year supply target of 1665 hectares. The critical areas that have been identified are Greater Edinburgh Parks and Gillman, which are ideally located close to transport and infrastructure services and can provide an immediate boost to supply.

#### *Regional constraints and opportunities*

The potential rezoning of Greater Edinburgh Parks would see Northern Adelaide become the principal focus for future industrial growth in Greater Adelaide. The Barossa Light and Lower North region has experienced a lower than expected land consumption in recent times and retains significant future stocks of land for rezoning. The proximity of this land to Northern Adelaide makes it strategically important in the future.

With the potential rezoning of land at Gillman, Western Adelaide retains a significant source of industrial land in the short-term.

The greatest industrial land consumption over the 2008-12 period was in Southern Adelaide, where the Desalination Plant and the Seaford Rail Extension occupied industrial sites. Remaining land stocks now only equate to less than 11 years' supply. Land supply for local service industry growth is important in Southern Adelaide and new land stocks should now be identified.

## **Retail land**

In 2011 more than 98,070 people in Greater Adelaide were employed in the retail sector making it a significant employer. Importantly, the very nature of retailing, unlike many other sectors, means that jobs are spread across the Greater Adelaide region, providing local employment opportunities.

The 30-Year Plan targets an additional 44,100 retailing jobs over 30 years (1500 on average per annum). Data from the most recent intercensal period (2006-2011) shows the number of people employed in retailing in Greater Adelaide increased by an average of 900 people per year.

Retailing is dynamic and is impacted by a number of factors with the two most significant being the increase in population and the growth in per capita incomes. The sector is also influenced by changes in the retail hierarchy, lifestyle patterns, supply and demand, market segmentation and changes in technology which includes internet purchasing.

### *Growth in retail floor space*

In the 15 years from 1991-92 onwards, there was significant growth in retail floor space in Greater Adelaide with average per capita provision increasing from 1.98m<sup>2</sup> to 2.34m<sup>2</sup>. Since 2007, only five new retail centres have been built and they are located north of the City of Adelaide. Only one (Blakes Crossing) is a traditional shopping centre, i.e. supermarket plus specialty shops. The other four centres concentrate mainly on bulky goods.

### *Retail land requirements*

Retailing is a minor user of space accounting for approximately 10 hectares (or 2 per cent) of total urban land consumption per year. Analysis of data from the 1999 and 2007 Retail Databases<sup>1</sup> indicates that:

- 55 per cent of new retail development was within the boundaries of, or adjacent to, existing centres (regional and district centres)
- 35 per cent of new retail development occurred on existing sites that required no additional land
- 10 per cent of the requirement for new retail land was in new centres (i.e. developing areas on the fringe).

Analysis of retail land provision in Adelaide shows that when measured in terms of average retail floorspace per capita, the current provision is at the high end of what would be expected, given similar indicators for other regions in Australia.

### *Future change*

A significant change in recent times is the emergence of internet retailing and purchasing. This may reduce the need for retail expansion in terms of “bricks and mortar” and projected retail requirements.

In the future, the City of Adelaide has potential to expand its aggregate retail supply. Regional centres also have unrealised development capacity, and district and lower order centres will increase in density in accordance with locational advantage.

New sites will continue to be established in order to service fringe developments and, in accordance with government policy, within designated transit corridors.

Bulky goods developments will continue to emerge for some time yet; however their spread will depend on the availability of large sites. Some of these sites may come from incursion into industrially zoned land.

---

<sup>1</sup> Retail Database 2007 produced by DPTI. Information can be found by visiting <http://www.sa.gov.au/planning/landsupplymonitoring>

# 1. Introduction

## 1.1 Purpose and context of this report

Since 2007, the State Government has undertaken planning reforms to enable South Australians to prepare for, and maximise the benefits of, future growth.

A key part of these reforms has been an improvement in the planned rezoning of land for residential, industrial, and retail purposes. The aim is to ensure that there is sufficient land, with the required zoning, released on time to meet the needs of these sectors.

The Housing and Employment Land Supply Program (HELSP), which was first introduced in 2010, is a significant step towards achieving this.

The first HELSP report followed the Government of South Australia's adoption of The 30-Year Plan as part of the Planning Strategy for South Australia. One of The 30-Year Plan's main aims is to reverse the state's long-term decline in land supply in all sectors.

The 2010 HELSP was both a benchmarking and monitoring report whereas the purpose of this year's report is to monitor the demand and supply of land for residential, industrial and retail use.

This report is also critical in meeting the requirements of the Council of Australian Governments (COAG) for all states to adopt an evidence-based approach to city planning.

## 1.2 Role of the Housing and Employment Land Supply Program

The HELSP supports the achievement of the targets of The 30-Year Plan by:

- ensuring the government can deliver a long-term supply of land required to support housing and jobs growth
- guiding rezoning by councils and the government
- supporting the transition to a new urban form through increased infill development
- aligning land supply with infrastructure planning and investment.

The HELSP, together with the *Planning Strategy Annual Report Card*,<sup>2</sup> is vital to realising the vision of The 30-Year Plan. The report card can be found at [www.sa.gov.au/planning/strategy](http://www.sa.gov.au/planning/strategy)

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<sup>2</sup> The second annual report card on The 30-Year Plan for Greater Adelaide and each of the regional volumes of the Planning Strategy was released by the South Australian Government in early 2013.

### 1.3 Report content

This report:

- provides an overview of key population and economic trends influencing the demand for residential and industrial land
- summarises the supply and consumption of residential land, as well as major greenfield and infill rezoning initiatives
- summarises the supply and consumption of industrial land
- presents an overview of key retail land use trends.

This report should be read in conjunction with the first HELSP report published in 2010, particularly in relation to the regional analysis of land supply and development trends. This report can be found at [www.sa.gov.au/planning/landsupplymonitoring](http://www.sa.gov.au/planning/landsupplymonitoring)

Table 1 illustrates the key land supply targets contained in The 30-Year Plan that are supported by the HELSP.

**Table 1 Land supply targets**

30-Year Plan targets	30-Year Plan policies
<b>Efficient planning of land supply and the Housing and Employment Land Supply program</b>	
Plan for a regional distribution of new dwellings as identified in Map D9. <sup>3</sup> (Map 1).	Identify sufficient land for residential purposes to lock in a 25-year rolling supply of land in both the established areas and new growth areas.
<b>Housing</b>	
Plan for net growth of 258,000 dwellings over 30 years, or an annual average construction target of about 10,100 dwellings a year (allowing for dwellings lost to demolition). <sup>4</sup>	Identify, through the Housing and Employment Land Supply Program, the total amount of land needed and set annual rolling targets to reflect changes in the market and changes to the rate of population growth.
<b>New transit corridors, growth areas, transit-oriented developments and activity areas</b>	
By the end of the Plan's 30 years, 70 per cent of all new housing in metropolitan Adelaide will be being built in established areas. <sup>5</sup>	Locate the majority of Greater Adelaide's urban growth within existing built-up areas through increases in density in strategic locations.
<b>The economy and jobs</b>	
Provide for 282,000 additional jobs during the next 30 years. <sup>6</sup> (Map 2).	Ensure sufficient land is available for commercial, industrial, retail, primary production, mining and other activities.

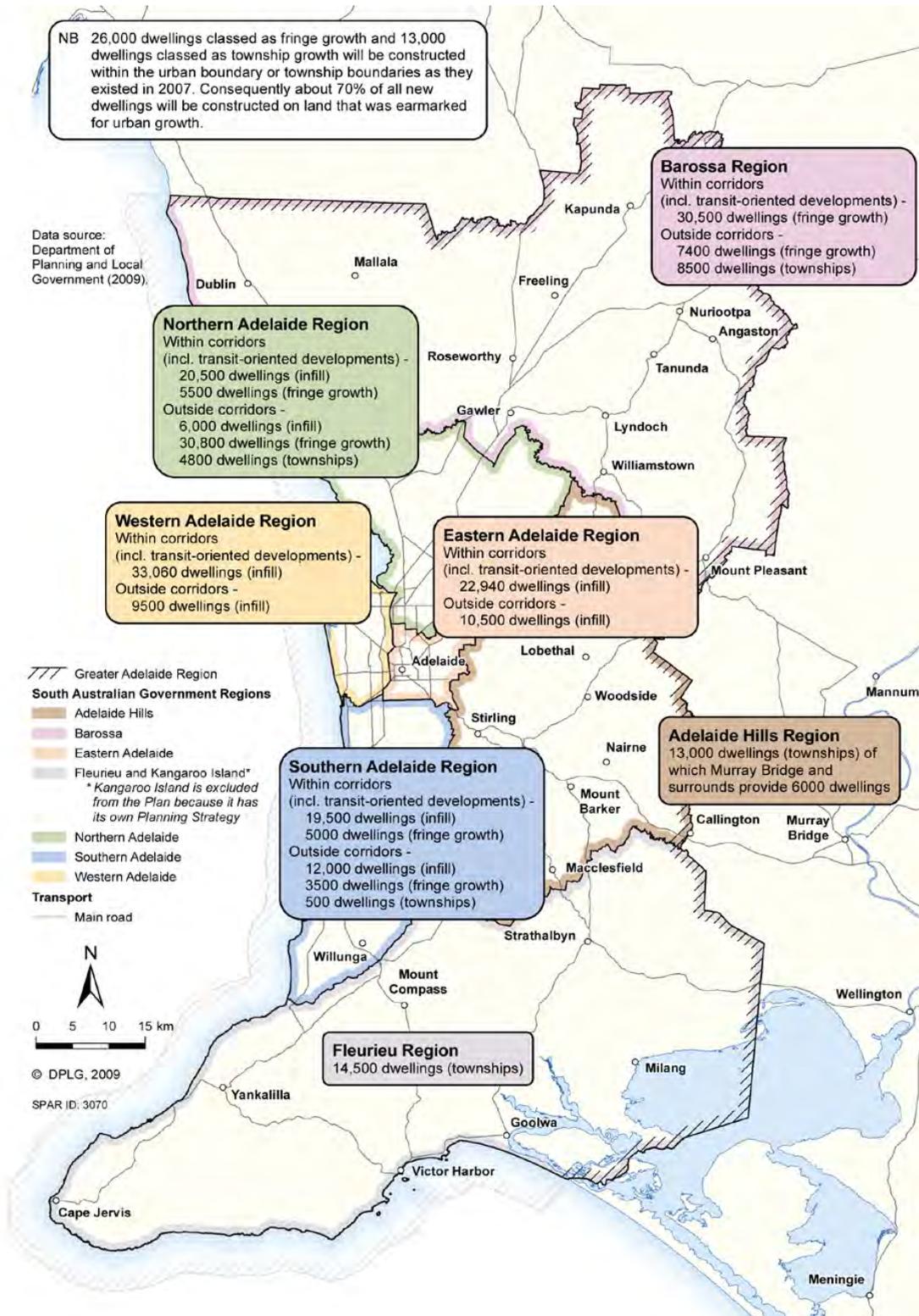
<sup>3</sup> The 30-Year Plan, Target B, page 96

<sup>4</sup> The 30-Year Plan, Target A, page 96

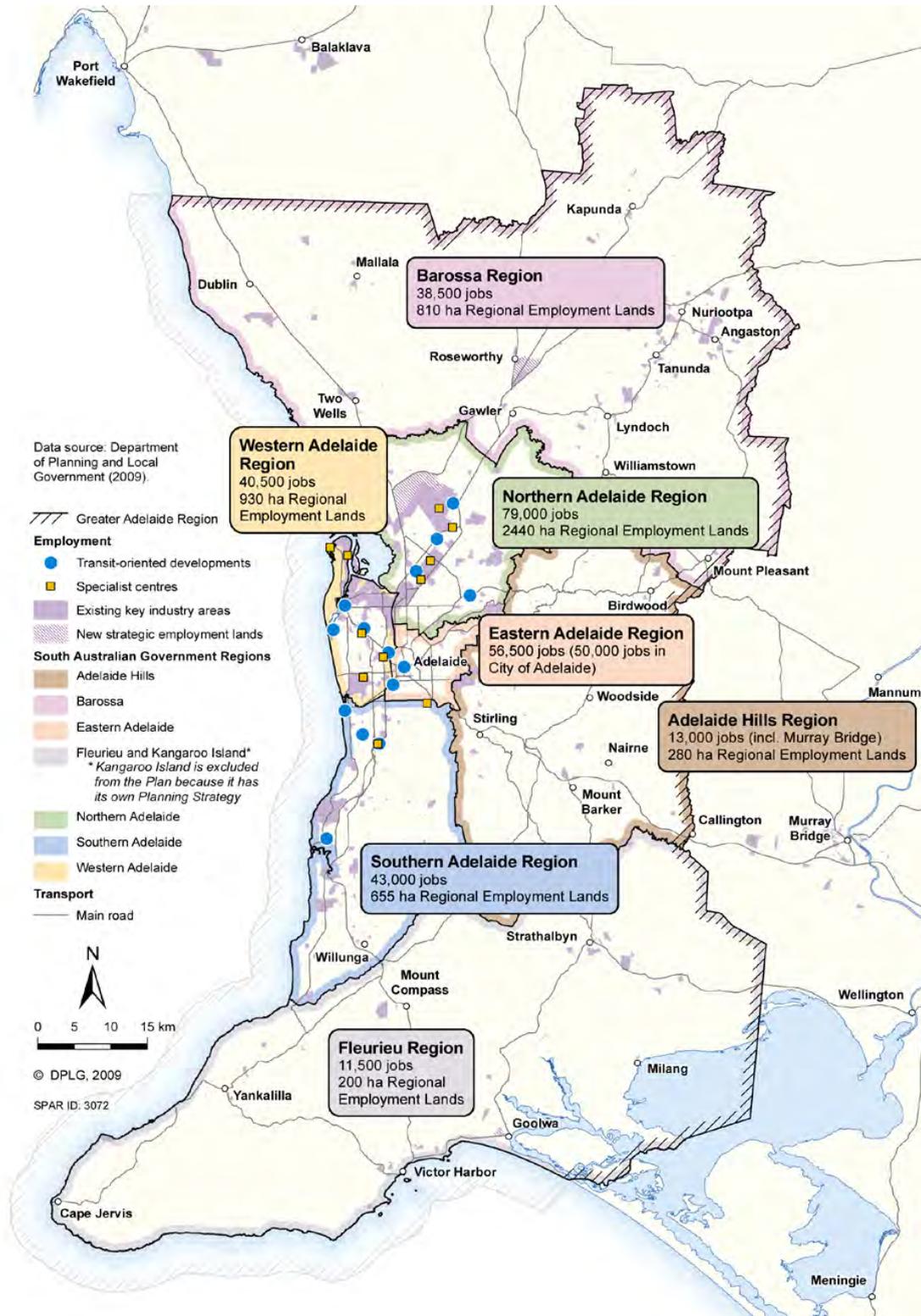
<sup>5</sup> The 30-Year Plan, Target B, page 72

<sup>6</sup> The 30-Year Plan, Target A, page 103

**Map 1 Regional distribution of housing targets identified in The 30-Year Plan**



**Map 2 Regional distribution of jobs and designated employment lands identified in The 30-Year Plan**



## 1.4 Reporting cycle

Table 2 shows the HELSP reporting cycle.

**Table 2 HELSP reporting cycle**

Title of report	Description	Cycle
<b><i>Housing and Employment Land Supply Program report 2010 (Greater Adelaide)</i></b> First published in 2010 This report can be found at <a href="http://www.sa.gov.au/planning/landsupplymonitoring">www.sa.gov.au/planning/landsupplymonitoring</a>	This report: <ul style="list-style-type: none"><li>describes the background and development of the land supply reporting program and</li><li>provides a benchmark for Greater Adelaide's land supply in the first year of operation of The 30-Year Plan.</li></ul>	every five years
<b><i>2012 HELSP monitoring report (Greater Adelaide)</i></b> First published in 2013 (this report)	This report monitors development against The 30-Year Plan targets.	annual

## 1.5 Data collection and analysis

Since the release of the first HELSP report in 2010, the government has established a regular land supply monitoring and reporting framework as shown in Table 3. To access reports related to the HELSP data collection and reporting cycle please go to: [www.sa.gov.au/planning/landsupplymonitoring](http://www.sa.gov.au/planning/landsupplymonitoring)

**Table 3 HELSP data collection and reporting cycle**

<b>Name of data report</b>	<b>Description</b>	<b>Cycle</b>
<b>Residential land development activity report (Greater Adelaide)</b>	summary of periodic data collected to monitor allotment production and development trends	every six months
<b>Residential broadhectare land supply report (Greater Adelaide)</b>	analysis and monitoring of vacant land supply zoned for residential purposes	annual
<b>Vacant industrial land survey (Greater Adelaide)</b>	survey to determine the amount of industrial land consumed in the preceding year (unpublished)	annual
<b>Analysis of demolition and redevelopment activity (Greater Adelaide)</b>	analysis and monitoring of spatial distribution of dwelling demolition, dwelling replacement type and yield	every 2 years
<b>Population projections (statewide)</b>	detailed projections of population growth and demographic change at small-area scale, based on an examination of census data	every five years (commenced late 2012)
<b>Industrial database (Greater Adelaide)</b>	complete audit of industrial land and property within the Greater Adelaide region	every five years
<b>Retail database (Greater Adelaide)</b>	audit of retailing in the Greater Adelaide region	periodically

This report has used field surveys and other government-held data described in Table 3 to determine supply, demand and consumption patterns over the preceding financial year.

Where practicable, data in this report is categorised according to regions within Greater Adelaide (Map 3).

**Map 3 Greater Adelaide region**



## 1.6 Population and housing demand

The relationship between population size and housing demand is complex. Population change is a product of both natural increase (births minus deaths) and net migration<sup>7</sup>. Traditionally, South Australia gains from overseas migration but experiences interstate migration losses.

Housing demand is driven by the increase in population resulting from net migration to the state, and the formation and dissolution of households. Although natural increase is a major contributor to the growth of the population, births and deaths mostly result in a change in the number of people living in a house and not an increase in the number of households. It is positive net migration that contributes to an increase in the number of households and therefore a growth in the demand for houses and residential land.

Residents who move to other states and territories tend to be younger adults who are seeking work and/or lifestyle changes. Many of these young adults leave the family home or a group household. This reduces household size, but not the number of households.

Conversely, people migrating from overseas may move into an existing household for a period of time but most will eventually form a new household and therefore increase the demand for housing. Future levels of net overseas migration are therefore major drivers of housing demand and the demand for residential land.

In South Australia, overseas students are a significant component of net overseas migration. There is a strong trend towards the development of specialised student accommodation that focuses on overseas students. Student accommodation developments can be very large, often comprising several hundred bedrooms, but sited on very small land parcels. These are also located close to academic institutions and commonly on commercial land in the city centre, which reduces the demand for residential land.

The ageing of South Australia's population may also have a negative impact on the demand for housing. Elderly people tend to age-in-place until their latter years and, then move into supported aged care accommodation. This increases the availability of existing dwellings and reduces the demand for new housing and residential land. This rate is likely to increase in the future, particularly as the 'baby boomers' reach retirement age and transition into old age.

Clearly, the magnitude of any population increase cannot be directly translated into a particular level of increase in either households or the demand for residential land.

### 1.6.1 Housing demand

'Effective demand' and 'underlying demand' are two terms commonly used to describe housing demand.

'Effective (or actual) demand' is the demand for housing expressed in the market at any given time by purchasers, renters and investors who are both willing and able to buy or rent a dwelling.

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<sup>7</sup> At the national level migration is the result of international arrivals and departures (net overseas migration). At the state level migration is comprised of net overseas migration and net interstate migration.

'Underlying demand' is estimated by applying recent or 'typical' propensities to form households to the current population. The result is an estimate of the total number of new households required.

'Underlying demand' is typically higher than effective demand because there is always a level of demand not satisfied by the market due to both economic reasons and the fact that some people are accommodated outside of the traditional housing sector (nursing homes, boarding houses etc.).

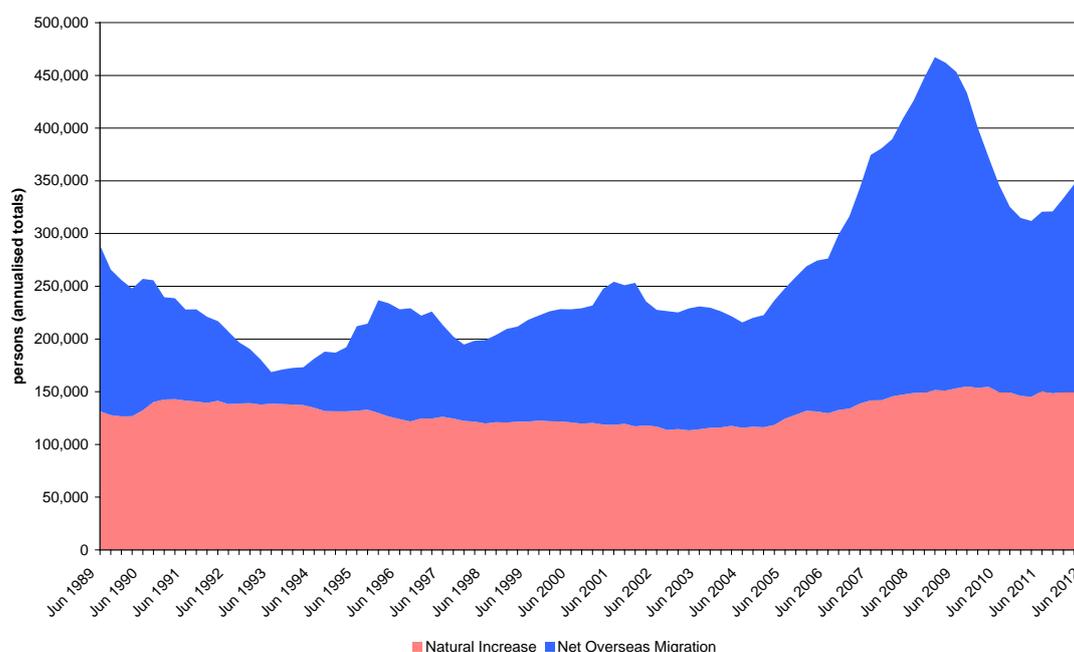
The 2011 census rebased, estimated resident population (ERP) for Australia and its states and territories, have been released. These estimates reduce the population of Australia by almost 300,000 people from the pre-census preliminary estimate. South Australia's population was reduced by around 18,000 people which equates to a reduction of approximately 7500 households, which is equivalent to one year's growth for the state. Any estimate of underlying housing demand will need to consider these adjustments.

### 1.6.2 Population growth

In calendar year 2008, Australia's population increased by more than 400,000. This was the highest recorded growth in the nation's population since 1971. The main contributor to this growth was net overseas migration (Figure 1).

However, since the peak in 2008, net overseas migration has fallen dramatically, resulting in national growth of around 250,000 for the year ending December 2010. Since then population growth has begun to increase with growth of more than 350,000 in the year ending June 2012. Over the same period net overseas migration was almost 200,000, its highest level in two years.

**Figure 1 Components of Australian population change 1989-2012**



Source: ABS catalogue 3101.0, released 18 December 2012

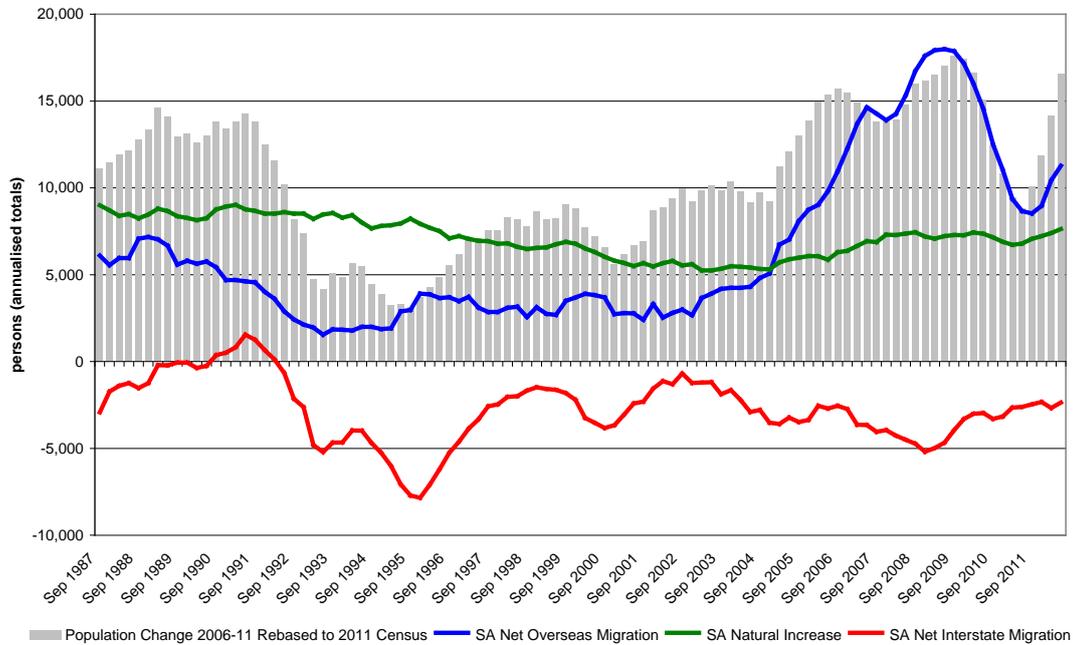
### 1.6.3 South Australia's population growth

South Australia's population growth has followed a similar pattern to that experienced by Australia but with peak growth occurring a year later in calendar year 2009. This was followed by a major decrease, returning the state to its long-term average growth. There is recent evidence that South Australia's population growth may be rebounding. In the March 2012 quarter, an increase of 14,000 people was recorded, a return to the typically high March quarter growth experienced previously.

However, net overseas migration is still half of the peak level of 2009 and South Australia's recent population growth has been buoyed by an increase in births and reduced net interstate migration losses.

Figure 2 shows the variable nature of population change in both Australia and South Australia and how it can fluctuate in a short period of time.

**Figure 2 South Australian population growth September 1987 to June 2012<sup>8</sup>**



Source: ABS catalogue 3101.0, released 18 December 2012

<sup>8</sup> Due to rebasing of quarterly population change totals from September 2006 to June 2011 to the 2011 Census results, the population change estimates shown above do not sum to the annualised components of change from September 2006 to March 2012.

## 2. Residential land

### 2.1 Overview

This section examines residential land supply, demand and consumption patterns and is based on the approach used in the 2010 HELSP report.

Focusing on changes since the 2010 report, this section includes:

- a description of recent development activity and trends
- an analysis of the current broadhectare residential land supply
- a description of recent major infill and broadhectare rezoning initiatives
- an overview of the land supply created by demolitions and re-subdivisions
- an analysis of housing demand and supply.

### 2.2 Recent development activity and trends

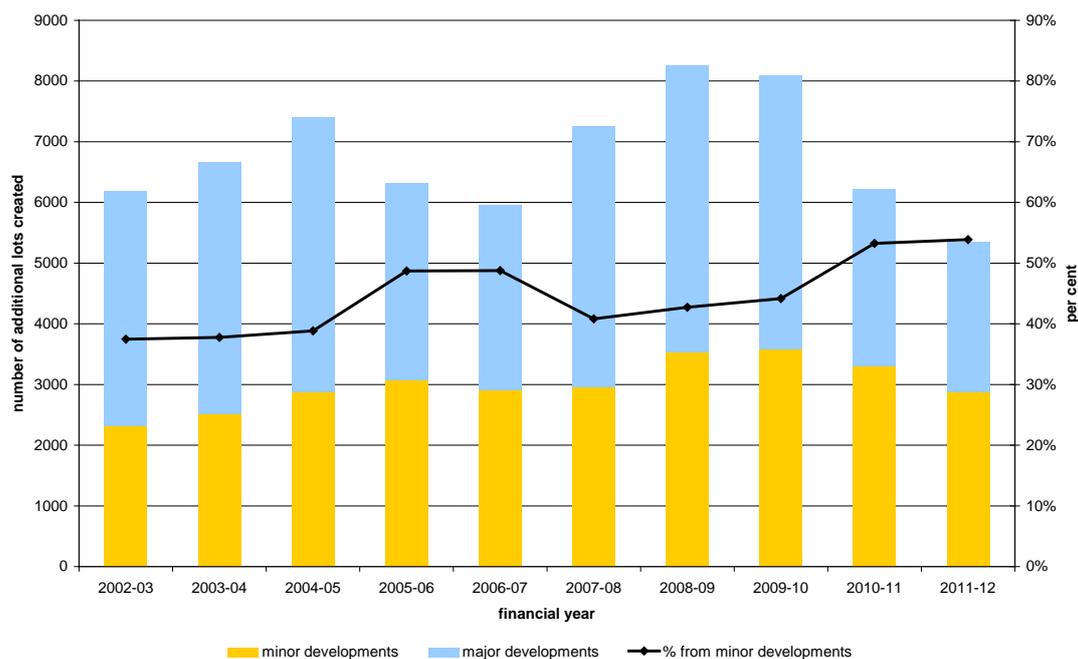
#### 2.2.1 Allotment production

Figure 3 shows the number of additional allotments created in each financial year over the past 10 years and includes both standard and community land divisions. Data is split into two categories: major developments (more than 10 allotments) and minor developments (10 allotments or fewer).

In 2011-12, allotment production in Greater Adelaide dropped to around 5200, 34 per cent lower than the number of allotments produced in 2009-10 and the lowest level in 10 years. Of these, the share of allotments derived from minor developments increased from about 44 per cent in 2009-10 to 54 per cent in 2011-12.

For further information please refer to the recently published *Residential Land Development Activity Report*. This report, published half yearly, provides a summary of activity levels for the various stages of the land development and subdivision process in South Australia. The report can be found at [www.sa.gov.au/planning/landsupplymonitoring](http://www.sa.gov.au/planning/landsupplymonitoring)

**Figure 3 Allotment production in Greater Adelaide, 2002-03 to 2011-12**



## 2.2.2 Dwelling production in Greater Adelaide

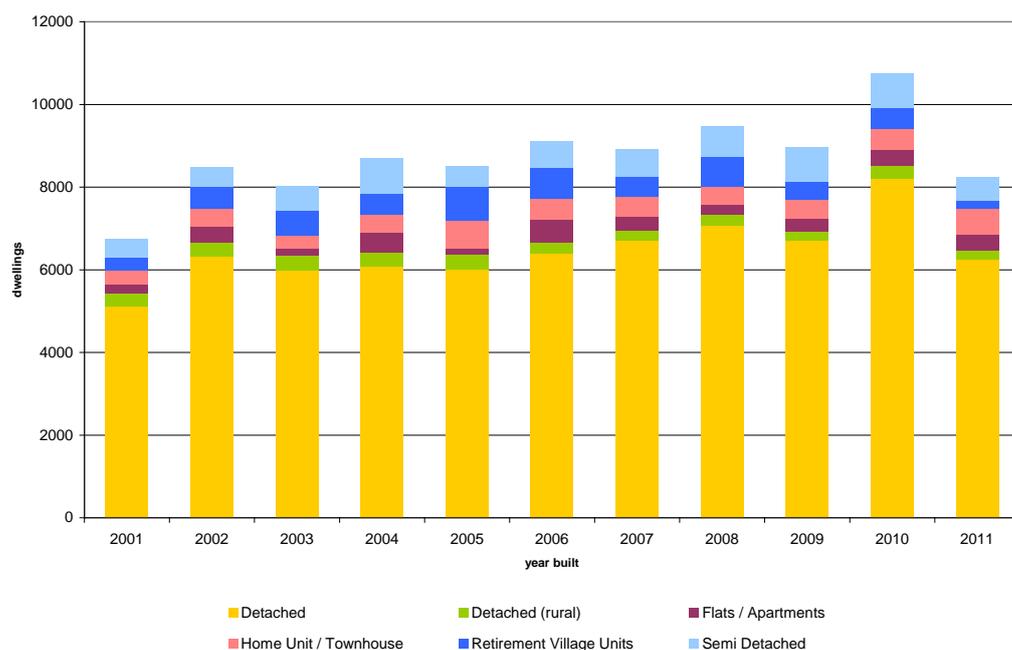
Figure 4 shows the number of new dwellings built each year since 2001 and includes replacement dwellings on demolition sites. In 2010, total gross dwelling production reached about 10,700 — the highest in 10 years. However in 2011, total gross dwelling production fell by 23 per cent to around 8200.

Allowing for approximately 1800 demolitions per year, this equates to a net increase of 8900 in 2010 and only 6400 in 2011. The 30-Year Plan's net dwelling production target for Greater Adelaide is around 8600 per annum.

Detached housing remains the dominant form of development and its relative share averaged around 74 per cent of total construction over the period 2001-2011. Over the same period, flats/apartments averaged approximately 350 per annum, or around 3.7 per cent of the total gross dwelling production.

Semi-detached dwellings, retirement village units and home units/townhouses contributed, on average 7.2, 6.8 and 5.4 per cent respectively between 2001 and 2011.

**Figure 4 Dwelling production 2001-2012, Greater Adelaide**



### 2.3 Residential land supply

Over the past decade, land supply monitoring has become more complex as the amount of broadhectare greenfield development has decreased and the land supply coming from established urban areas has increased. This change, in conjunction with the objectives of The 30-Year Plan, means that our land monitoring activities need to consider supply from all sources including:

- **Major infill:** most of these are sites within transit corridors and key precincts as outlined in The 30-Year Plan, plus the City of Adelaide. Many of these sites require rezoning to help achieve infill zoning targets.
- **Minor infill:** these sites are created by the demolition, re-subdivision and redevelopment of existing residential land parcels. This category includes developments producing 10 dwellings or fewer; in fact most of these developments produce only one or two additional dwellings.
- **Broadhectare (Greenfield):** these include land parcels, which are greater than 4000 square metres, are located in residential and mixed use zones and include both infill and fringe/township locations.

Table 4 shows the relative share of new dwellings coming from the three main types of residential development in Greater Adelaide described above. The share from minor infill tends to fluctuate between 25 and 35 per cent depending on the state of the housing industry, although in numerical terms it does provide a relatively stable supply source.

**Table 4 Share of new dwellings by type**

Development type	Description	Per cent
Broadhectare	Includes land in fringe, township and infill locations zoned for residential use	40-50%
Minor Infill	Demolition, re-subdivision and redevelopment of existing suburban blocks.	25-35%
Major Infill	Designated corridors, precincts and the City of Adelaide. In many councils, zoning changes will be required to achieve the targets of The 30-Year Plan.	20-30%

The share coming from major infill projects is expected to increase over time as councils and the government work together to identify opportunities to rezone corridors and other strategic sites for higher density development.

### **2.3.1 Broadhectare land supply**

This section analyses the supply of residentially zoned broadhectare land<sup>9</sup> as at June 2012 and assesses this supply in relation to the 15-year target outlined in The 30-Year Plan.

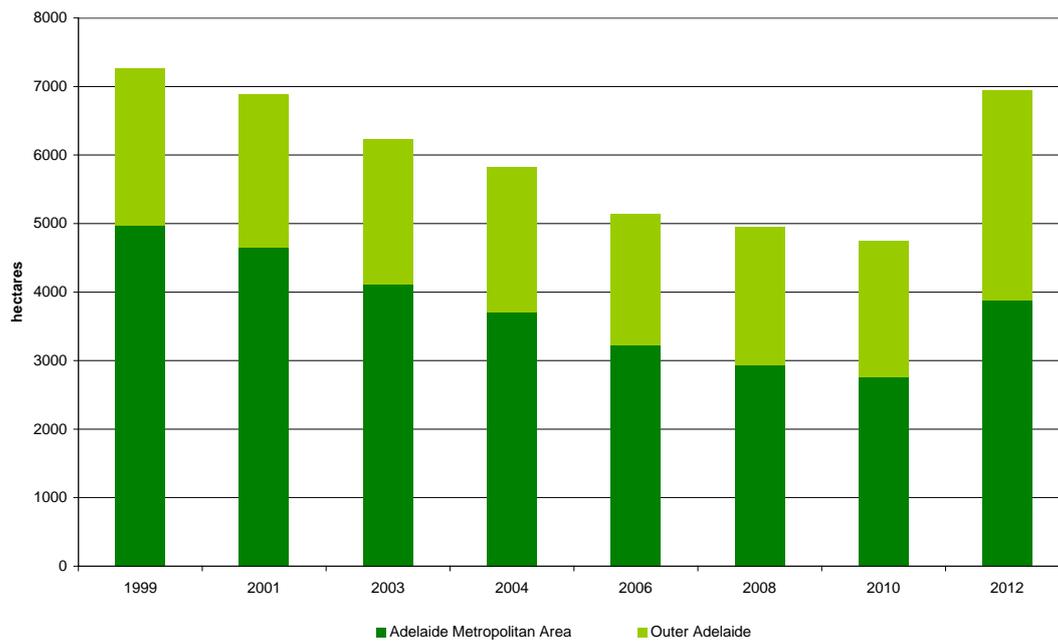
Each year the government monitors the total supply of zoned broadhectare land, which is the gross supply of land available for broadhectare residential development. This land supply is spread across the Greater Adelaide region in fringe, township and infill locations.

Major rezonings at Buckland Park, Mount Barker, Gawler East, Gawler South and Evanston Gardens have led to a significant improvement in the stock of zoned broadhectare land as at June 2012. As a result, land stocks have returned to levels not seen since 2001 (Figure 5).

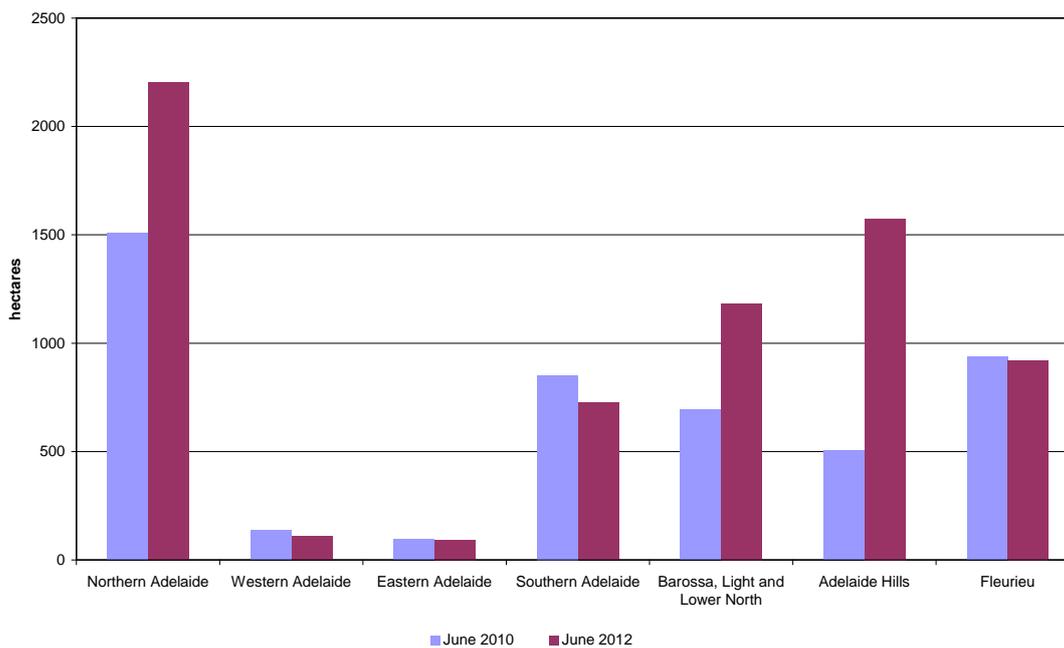
Figure 6 shows broadhectare land supply by region with Northern Adelaide (Buckland Park), Barossa Light and Lower North (Gawler East, Gawler South), Adelaide Hills (Mount Barker) and Murray Bridge (Gifford Hill) increasing significantly between 2010 and 2012. The Northern Adelaide and the Barossa Light and Lower North regions now account for just under 50 per cent of the total zoned broadhectare land supply.

<sup>9</sup> Broadhectare land includes land parcels greater than 4000 square metres in residential zones.

**Figure 5 Gross zoned broadhectare land supply, Greater Adelaide 1999–2012<sup>10</sup>**



**Figure 6 Gross zoned broadhectare land supply by planning region, 2010 and 2012**



A more detailed analysis of the broadhectare land supply is available in the annual *Residential land supply report* which can be accessed at [www.sa.gov.au/planning/landsupplymonitoring](http://www.sa.gov.au/planning/landsupplymonitoring)

<sup>10</sup> Outer Adelaide includes the Mallala, Light, Barossa, Adelaide Hills (part), Mount Barker, Alexandrina, Victor Harbor and Yankalilla councils

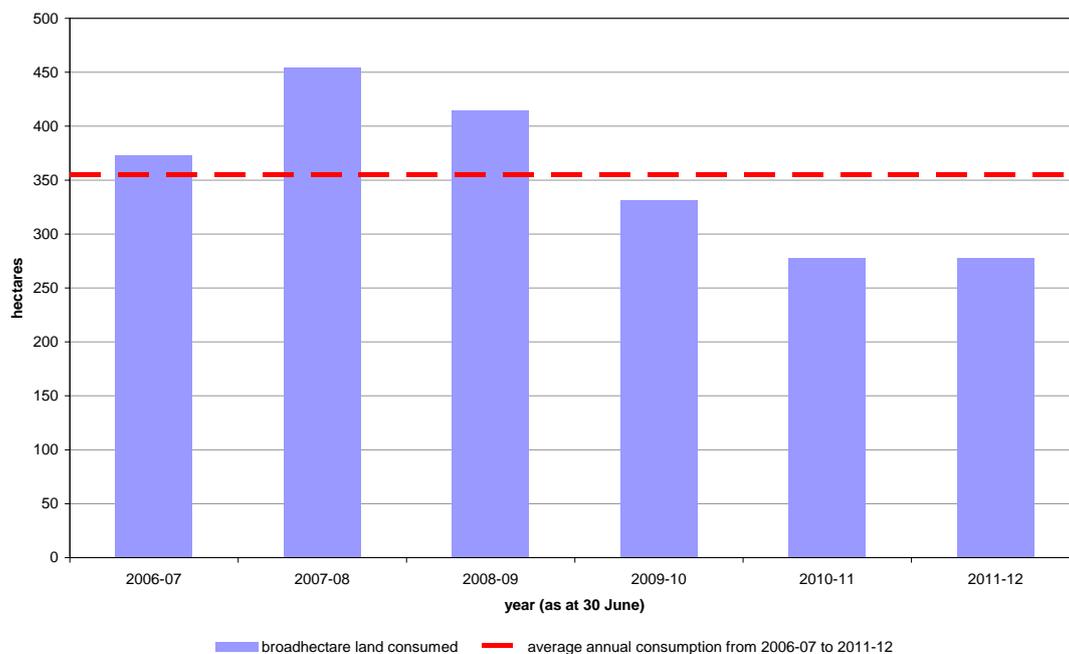
### 2.3.2 Broadhectare land consumption

The ongoing requirement to rezone the key growth areas identified in The 30-Year Plan depends on consumption rates and the 15-year zoned supply target. For the 2010 HELSP report, a consumption rate of 400 hectares per year was assumed. Since then a more rigorous method has been developed to calculate annual broadhectare land consumption. Figure 7 shows annual consumption over the past 6 years as well as the average annual consumption over the period (355 hectares)<sup>11</sup>.

In the past two financial years, corresponding with a downturn in the housing market, consumption has fallen to 270 hectares per year.

Given the lower level of broadhectare land consumption in recent years, it is considered that the average annual consumption rate (355 hectares) should now be used to estimate the years of supply from the current broadhectare land supply. This slight change in methodology will help to better reflect longer-term trends in broadhectare land consumption.

Figure 7 Broadhectare land consumption in Greater Adelaide, 2006-07 to 2011-12



<sup>11</sup> Average consumption is based on data over a 6 year period from 2006-07 to 2011-12. In the future, the average consumption will be calculated using the number of years of data available—up to a maximum of 10 years.

### 2.3.3 Achieving a 15-year zoned supply

This section calculates the current zoned supply of land (measured in years), based on the 2012 broadhectare land supply data. This estimate determines the amount of additional land that needs to be rezoned to achieve a 15-year supply.

The net available land supply from the 2012 broadhectare land supply analysis has been calculated in the following way:

- The amount of broadhectare land owned by private individuals<sup>12</sup> has been reduced by 50 per cent to account for uncertainty about future land development intentions. It is assumed that land in private ownership is less likely to be available for development in the short to medium term.
- The amount of broadhectare land in all other ownership classes has been reduced by 25 per cent to account for land that remains undeveloped for reasons such as landowner decisions, environmental constraints, buffer requirements or policy decisions.
- After taking into account these reductions, the net broadhectare land supply was divided by the average annual consumption (355 hectares) to calculate a broadhectare land supply estimate of 13.5 years at June 2012 (Table 5).

**Table 5 Estimated net zoned land supply from June 2012: residential broadhectare land supply**

Greater Adelaide region	Net zoned land supply (hectares)		
	Land owned by companies and government (reduced by 25%)	Land owned by private individuals (reduced by 50%)	Total
Northern Adelaide	1 316	223	1 539
Western Adelaide	66	10	76
Eastern Adelaide	18	34	52
Southern Adelaide	337	138	475
Adelaide Metro	1 738	405	2 143
Barossa, Light and Lower North	310	385	695
Adelaide Hills	370	540	910
Fleurieu	402	193	595
Outer Adelaide	1 434	1 192	2 626
Murray Bridge	375	60	435
Greater Adelaide	3 135	1 583	4 778
<b>Estimated years of supply @ 355 ha/year</b>			<b>13.5</b>

By comparison, a consumption rate of 400 hectares would equate to a 12 year supply and a rate of 300 hectares would equate to a 16 year supply.

<sup>12</sup> The residential land supply report analyses broadhectare land supply by owner class (company, private, government, association) to enable a more detailed analysis

### 2.3.4 Growth area land supply status

To supplement the current zoned residential land supply and achieve a 15-year zoned land supply, significant progress has been made on the structure planning and investigations for several of the growth areas listed in Table 6.

The 'Playford Projects' structure plan encompasses The 30-Year Plan growth areas of Virginia South and North, Angle Vale and Playford North extension. This structure plan is near completion and requires Cabinet approval for consultation in early 2013.

Structure planning for the future growth areas at Roseworthy is currently in progress.

**Table 6 Status of growth areas as at March 2013**

Rezoning or other event	Region	Current status	Estimated yield	Issues/ Comments
Virginia South and North	Northern Adelaide	Structure Plan in progress	4200	The structure plan requires Cabinet approval for public consultation, which is expected to be sought in early 2013. Renewal SA is currently undertaking the infrastructure negotiations SA Water is currently designing and costing a wastewater solution Virginia North requires resolution of Gawler River flooding issues
Playford North extension / Munno Para Downs	Northern Adelaide	Structure Plan in progress	5950	
Angle Vale	Northern Adelaide	Structure Plan in progress	4400	
Two Wells	Barossa, Light and Lower North	Council-initiated DPA in progress	2600-3400	Some infrastructure negotiations are yet to be finalised. DPA in final stages. Possible approval by mid 2013
Roseworthy West	Barossa, Light and Lower North	Structure plan in progress	24,600	The eastern portion of this growth area is designated as 0-15 years in <i>The 30-Year Plan</i> . Major regional infrastructure, including roads, water supply, energy and wastewater still to be determined through structure planning
Roseworthy East	Barossa, Light and Lower North	Structure plan in progress	13,600	Wholly designated as 16-30 years in <i>The 30-Year Plan</i> . Major regional infrastructure still to be resolved
Aldinga	Southern Adelaide	Not commenced	1200	Renewal SA to develop a Portfolio Plan to sequence the development of all their remaining assets
Hackham	Southern Adelaide	Council initiated DPA in progress for northern area	2890	Major infrastructure issues. Approximately half is owned by Renewal SA and the remainder is in fragmented private ownership
Sellicks Beach	Southern Adelaide	Not commenced	1300	Major infrastructure issues
Goolwa and Hindmarsh Island	Fleurieu	Not commenced	670	Strategic Directions Report in progress: to be submitted in 2013
Victor Harbor	Fleurieu	Not commenced	960	

Rezoning or other event	Region	Current status	Estimated yield	Issues/ Comments
Tanunda	Barossa, Light and Lower North	DPA approved	440	DPA approved February 2013
Freeling	Barossa, Light and Lower North	Council DPA in progress	1100	Major infrastructure and primary production issues. Council is considering whether to proceed with DPA
Concordia	Barossa, Light and Lower North	Not commenced	2500	Designated as 16-30 years in <i>The 30-Year Plan</i> .
Lyndoch Residential	Barossa, Light and Lower North	DPA in progress	80	DPA completed consultation in February 2013

### 2.3.5 Infill rezoning initiatives

Since the release of the first HELSP report in October 2010, there has been significant progress on structure plans and investigations relating to key infill areas and transit corridors in Greater Adelaide.

Table 7 summarises some of these key initiatives and their current status. Two of the most noteworthy initiatives are the Capital City DPA and the Inner Metropolitan Growth ministerial DPA, discussed below.

The Capital City DPA unlocks the development potential of the city by supporting greater building heights and activating the city's squares and main streets, while providing for high quality, innovative design. The DPA is intended to increase the population capacity of the city centre over the next 30 years to as many as 60,000 people, and increase the potential number of dwellings to as many as 33,000. The DPA also introduces catalyst sites as a key development incentive<sup>13</sup>.

The Inner Metropolitan Growth ministerial DPA proposes to rezone strategic corridors adjacent to the City of Adelaide to help achieve the objectives and infill targets of The 30-Year Plan. The DPA includes:

- the south eastern Park Lands rim in the Burnside Council area
- Prospect Road, Churchill Road and Main North Road in the City of Prospect area.

In addition to the Inner Metropolitan Growth ministerial DPA, council-prepared DPAs for Unley, West Torrens and Norwood Payneham and St Peters have been prepared with the same strategic intent. It is estimated that these changes could yield up to 8700 additional dwellings by 2038.

For further details please go to: [www.dpti.sa.gov.au/planning/innermetrogrowth](http://www.dpti.sa.gov.au/planning/innermetrogrowth)

<sup>13</sup> Catalyst sites encourage the amalgamation of allotments and enable a greater intensity of development to be realised on sites along main streets and terraces over 1500 square metres.

**Table 7 Infill rezoning initiatives as at February 2013**

<b>Rezoning or other event</b>	<b>Region</b>	<b>Current status</b>	<b>Estimated yield</b>	<b>Comments</b>
City of Adelaide	Eastern Adelaide	Capital City DPA approved	Significant additional capacity	Exceeds 30-Year Plan dwelling target for the City of Adelaide
Bowden redevelopment	Western Adelaide	DPA approved	2400	Site works commenced
Campbelltown Residential DPA	Eastern Adelaide	DPA in progress	Significant additional capacity	Will help to achieve 30-Year Plan land supply objectives. Consultation on DPA completed December 2012. Possible approval by mid 2013.
Highbury	Northern Adelaide	DPA in progress	800-1000	Possible approval by late 2013
Klemzig Interchange DPA	Northern & Eastern Adelaide	DPA in progress	600	Part of O-Bahn corridor
Modbury regional centre SP and DPA	Northern Adelaide	SP and DPA in progress	Up to 3000	Part of O-Bahn corridor. Investigations for the DPA are currently being undertaken by Council.
Inner Metropolitan Growth Ministerial DPA	Eastern & Northern Adelaide	DPA in progress	<i>Inner Metropolitan Growth Project</i> 8700 dwellings	Ministerial DPA for Prospect and Burnside councils. Released for consultation by the Minister on 4 Dec 2012.
Inner Metropolitan Council DPAs	Eastern & Western Adelaide	DPAs in progress		Council DPAs for Unley, West Torrens, and Norwood Payneham and St Peters. Part of the <i>Inner Metropolitan Growth project</i> . Consultation on the three DPAs closed late February 2013
Southern Corridor Structure Plan	Southern Adelaide	SP in progress	To be determined	Investigations and preliminary consultation underway with council
Tonsley Park Redevelopment	Southern Adelaide	DPA released for consultation	1000	Consultation closed March 2013
Magill Training Centre DPA	Adelaide Hills	DPA in progress	300-350	Former McNally Training Centre
Noarlunga Regional Centre	Southern Adelaide	DPA approved	Significant additional capacity	Transit-oriented development and other infill opportunities around the Noarlunga Centre
Northgate		DPA approved	Extension of existing Northgate project	Lightsview development. Expanded area now includes former school site + policies for mixed use developments
West Lakes (AAMI) DPA	Western Adelaide	DPA released for consultation	1600	Consultation closed March 2013
Devon Park	Western Adelaide	DPA in progress	80-100	Rezoning industry land to residential, medium density. Investigations for the DPA are currently being undertaken by Council.
Woodville Station DPA	Western Adelaide	DPA released for consultation	300	Transit-oriented development.

<b>Rezoning or other event</b>	<b>Region</b>	<b>Current status</b>	<b>Estimated yield</b>	<b>Comments</b>
Woodville West	Western Adelaide	Development in progress	400	The Square: Stage one now on sale
Salisbury Heights	Northern Adelaide	DPA in progress	To be determined	Review of 'rural living' land to support infill. Topography of land, traffic movement and bushfire risk are key issues.
Waterloo Corner Road, Burton	Northern Adelaide	DPA in progress	To be determined	Rezoning of industrial land to residential. Significant constraints currently being investigated by Council.

In addition to the projects outlined above, Renewal SA is actively involved in many other urban renewal projects that will help to achieve the infill targets of The 30-Year Plan.

### **2.3.6 Minor infill (demolition and redevelopment)**

As discussed previously, minor infill is an important component of the overall land supply equation thereby making a significant contribution to the infill targets of The 30-Year Plan.

The government has recently completed a study<sup>14</sup> that analyses the demolition, re-subdivision and redevelopment of the existing housing stock in metropolitan Adelaide that occurred between 2004 and 2010. The results of this study show that this type of development currently contributes around one-third of the net dwelling increase in metropolitan Adelaide each year. It is worth noting that in this category most projects result in the production of only one or two additional dwellings<sup>15</sup>.

Some of the key findings from the latest study are:

- A total of 10,975 dwellings were demolished in the Adelaide Statistical Division between July 2004 and June 2010. This equates to an average of 1829 dwelling demolitions per year.
- An estimated 18,989 new dwellings will be constructed in place of the demolished dwellings, which is a net increase of 8014 dwellings. This equates to an average annual net increase of approximately 1335 dwellings as a result of redevelopment on demolition sites.
- The replacement rate on demolition sites is 1.7 dwellings for every one dwelling demolished.
- A comparison with previous studies shows that the number of demolitions has increased from 700 in 1991, 1300 in 1999 and an annual average of over 1800 during the period 2004 to 2010.
- The number of sites in the Adelaide Statistical Division re-subdivided<sup>16</sup> was 2812 between July 2004 and June 2010. Annually, the average number of small scale re-subdivisions is 469 sites.
- An estimated 3507 new dwellings will be constructed on re-subdivision sites. On an annual basis this equates to 585 new dwellings per year.
- The combined average net annual increase from demolition and resubdivision activity over the study period was 1920 dwellings.

The spatial distribution of both demolitions and re-subdivisions between 2004 and 2010 is shown on Maps 4 and 5.

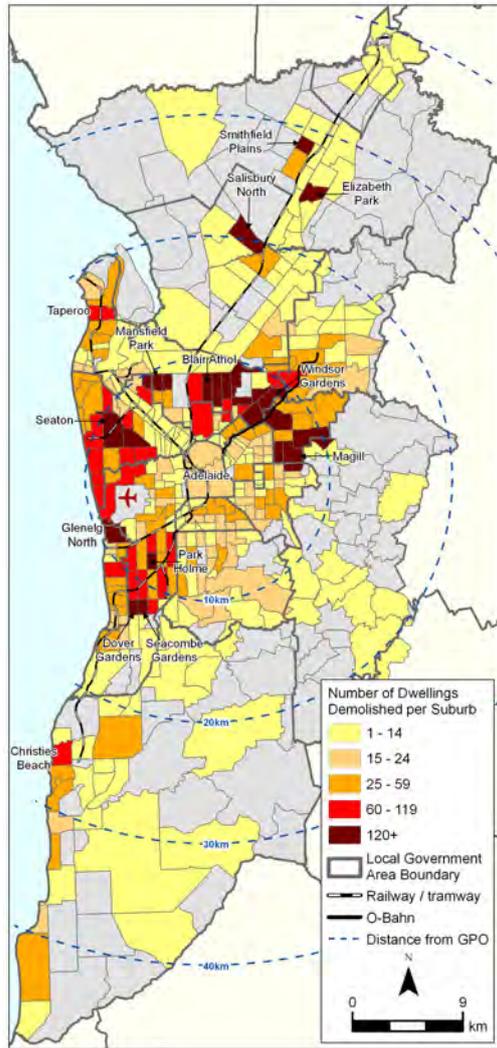
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<sup>14</sup> *Residential demolition and redevelopment in metropolitan Adelaide 2004-2010*  
[www.sa.gov.au/planning/landsupplymonitoring](http://www.sa.gov.au/planning/landsupplymonitoring)

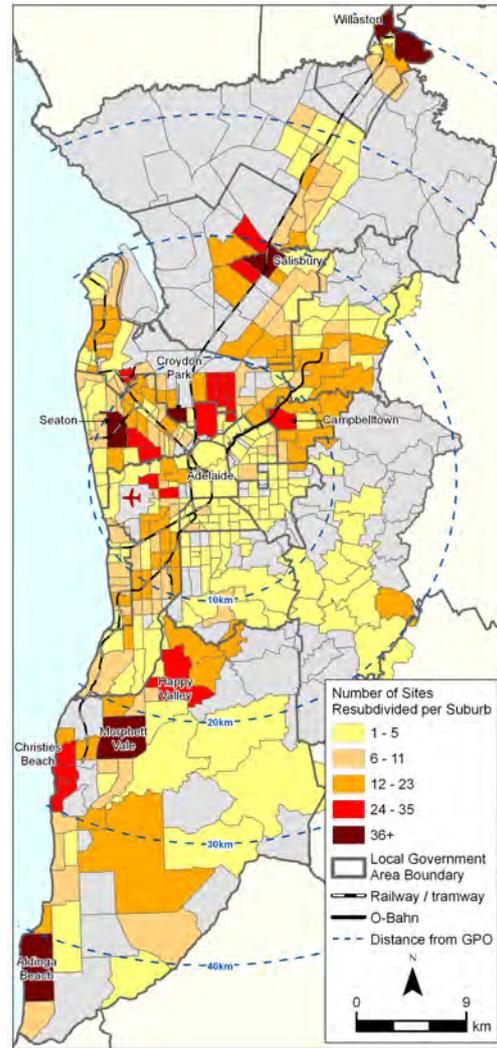
<sup>15</sup> The 'minor infill' category includes developments of 10 additional lots or fewer

<sup>16</sup> On a re-subdivision site the original dwelling(s) is retained and the newly created allotment was either vacant or had a new, or partly constructed, dwelling in 2010.

**Map 4** Number of demolitions by suburb, 2004 to 2010



**Map 5** Number of re-subdivisions by suburb, 2004 to 2010



The full report and fact sheet is available from:  
[www.sa.gov.au/planning/landsupplymonitoring](http://www.sa.gov.au/planning/landsupplymonitoring)

## 2.4 Housing targets

The dwelling target outlined in The 30-Year Plan of 258,000 new dwellings has been used to benchmark housing demand in this analysis. Averaged over 30 years, this equates to adding about 8600 net dwellings each year.

Using this calculation, The 30-Year Plan includes dwelling targets for each of Greater Adelaide's seven regions. For the purposes of the HELSP, these regional targets have been split into three, five-yearly groups<sup>17</sup>, based on:

- the current and projected land supply in the regions
- recent allotment and dwelling production trends
- anticipated structure planning and land release activity.

Table 8 illustrates these dwelling targets.

**Table 8 Estimated dwelling targets by region, Greater Adelaide**

Greater Adelaide region	Short term (0-5 years)	Medium term (6-10 years)	Long term (11-15 years)	Total demand estimate (0-15 years)
Northern Adelaide	12 500	12 500	12 500	37 500
Western Adelaide	6 500	7 000	7 000	20 500
Eastern Adelaide	5 500	5 500	5 500	16 500
Southern Adelaide	8 000	8 000	7 000	23 000
Barossa, Light and Lower North	3 000	5 500	6 000	14 500
Adelaide Hills (inc. Murray Bridge)	3 000	3 000	3 000	9 000
Fleurieu	3 000	3 000	3 500	9 500
<b>Greater Adelaide (total)</b>	<b>41 500</b>	<b>44 500</b>	<b>44 500</b>	<b>130 500</b>

## 2.5 Demand supply analysis

This section examines land supply and demand at the sub-regional level to assess whether there is an equitable distribution of fringe, infill and township development opportunities as required by The 30-Year Plan. The South Australian Government is committed to delivering supply in these areas by creating opportunities for both broadhectare and major infill developments.

The short to medium-term (0 to 10 years) estimates are based largely on known development intentions for broadhectare land, existing major infill projects and assumptions about the level of minor infill development activity. Estimates outside this timeframe should be treated with considerable caution.

Any gaps between identified supply and demand indicate that additional dwelling sites must be created by major infill projects to meet subregional demand targets in the longer term.

<sup>17</sup> The HELSP report covers the next 15 years due to the uncertainty beyond this period.

### 2.5.1 Total estimated dwelling supply<sup>18</sup>

The total estimated dwelling supply comprises dwelling sites from the following categories:

- **programmed (known) major infill and broadhectare developments**— These include aged care, apartment and infill projects that will yield more than 10 dwellings (Appendix A)
- **minor infill developments**—these estimates include developments that will yield 10 dwellings or fewer (in many cases these developments yield only one or two dwellings) (Appendix A)
- **future growth areas**—while many future growth areas will be zoned for residential purposes in the short term (0-5 years), development start dates will ultimately be determined by the availability of key infrastructure and the demand for housing. (Appendix A).

Table 9 summarises the total estimated supply of dwelling sites from the categories described above.

**Table 9 Total estimated dwelling supply by Greater Adelaide region**

Greater Adelaide region	Short term (0-5 years)	Medium term (6-10 years)	Long term (11-15 years)	Total (0-15 years)
Northern Adelaide	13 767	13 981	11 585	39 333
Western Adelaide	6 463	4 242	3 150	13 855
Eastern Adelaide	6 050	2 787	1 627	10 464
Southern Adelaide	8 047	6 455	5 167	19 669
Barossa, Light and Lower North	5 332	4 647	4 331	14 310
Adelaide Hills (inc. Murray Bridge)	3 186	2 932	3 900	10 018
Fleurieu	3 130	3 846	2 150	9 126
<b>Greater Adelaide (total)</b>	<b>45 975</b>	<b>38 890</b>	<b>31 910</b>	<b>116 775</b>

Based on the target for 30 years outlined in The 30-Year Plan, about 130,500 new dwellings will be required within Greater Adelaide in the next 15 years. As demonstrated in Table 9 above, existing and forecast dwelling development provides about 14,000 fewer dwellings than this target requires.

### 2.5.2 Balancing demand and supply

The balance between supply and demand is a measure of the difference between the total estimated dwelling supply and the dwellings targets in a prescribed period.<sup>19</sup>

An analysis of the gap between demand and supply within Greater Adelaide over the first 15-year period of The 30-Year Plan is provided in Figure 8. This chart demonstrates the gap in the Western, Eastern and, to a lesser extent, Southern Adelaide regions based on the current zoned land supply. In doing so, the chart highlights the net additional dwellings required to meet The 30-Year Plan's regional targets.

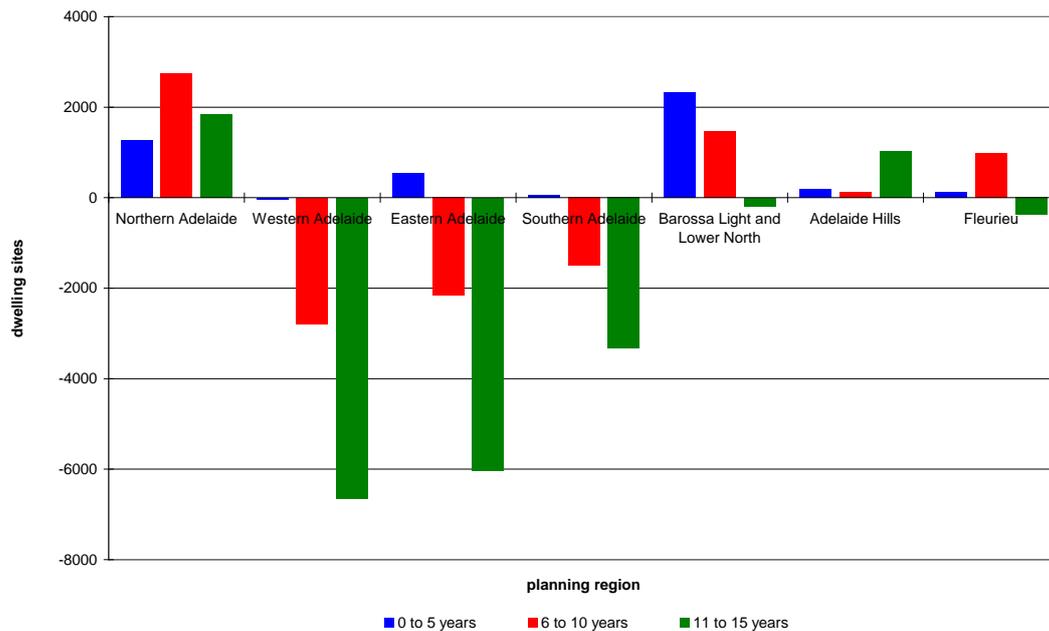
<sup>18</sup> For details about the approach used to estimate the total dwelling supply refer to the 2010 HELSP report.

<sup>19</sup> For further details please refer to 2010 HELSP

For example, in Eastern Adelaide (which includes the City of Adelaide) the currently proposed and programmed projects should adequately meet demand in the next 5-year period. However, beyond that time the chart shows a considerable gap. The recently approved Capital City DPA, and other infill rezoning initiatives, will provide greater opportunity for new infill developments in the future.

Ongoing structure planning of corridors and precincts will also contribute to the supply in the medium to longer term.

**Figure 8 Cumulative estimated dwelling supply and demand balance over 15 years as at June 2012**



## 3. Industrial land

### 3.1 Overview

Industrial land includes land zoned for industry as well as land that is not zoned for industry but is used for industrial purposes. It is important that new supplies of suitable, well-located industrial land are provided in Greater Adelaide and that land set aside for industry is not developed for other purposes. This will ensure there is an adequate supply of land in each region of Greater Adelaide to support job creation and community prosperity in the long term.

Industrial land supply includes:

- **Developable industrial land**

This is defined as vacant, unoccupied or derelict sites in an industrial zone (excluding extractive (mining) and home industry zones).

In 2012 there were 1330 hectares of developable industrial land, comprising both government-owned and private land, in Greater Adelaide and Murray Bridge. Most of the government-owned supply (90.9 per cent) was in Northern and Western Adelaide.

- **Market-ready industrial land**

Market-ready industrial land consists of individual serviced allotments that are available for immediate purchase and where planning and design, site preparation and civil construction have been completed. This process, which can take between 18 months and three years, is often beyond the role of the state government.

However, industrial land development can also constrain supply due to the zone type and allotment size. For example, home industry zones would not meet the needs of all industry sectors as industry needs a range of allotment sizes to meet industry type and individual business requirements.

- **Other potential sources of vacant land**

This includes land currently used for agriculture that is located within industrial zones. In 2012, there were 978 hectares of industrial zoned land within Greater Adelaide currently used for agriculture. The Barossa Light and Lower North region has the greatest supply with 626 hectares, while Southern Adelaide, Northern Adelaide and Murray Bridge make up the remainder. These land holdings may be converted to an industrial land use in the future.

## 3.2 Recent activity and trends

### 3.2.1 Overview of industrial land

As at June 2012 there were 25,889 hectares of industrial land in Greater Adelaide (Table 10), comprising:

- 14,701 hectares of industry zoned land
- 11,188 hectares of non-industry zoned land, including:
  - land used for industrial purposes such as quarries, salt evaporation ponds, airports and mines (in the Hills Face Zone) but not zoned industry
  - land identified for future rezoning (referred to as future industry land) but not zoned for industry in 2012.

**Table 10 Industrial land stocks, Greater Adelaide 2012**

Greater Adelaide region	Industry zoned (ha)	Non-industry zoned (ha)	Total industry (ha)
Northern Adelaide	6 754	2 841	9 595
Western Adelaide	3 353	836	4 189
Eastern Adelaide	86	90	176
Southern Adelaide	1 942	854	2 796
Barossa, Light and Lower North	1 451	3 437	4 888
Adelaide Hills (inc. Murray Bridge)	729	1 841	2 570
Fleurieu	387	1 288	1 675
<b>Greater Adelaide (total)</b>	<b>14 701</b>	<b>11 188</b>	<b>25 889</b>

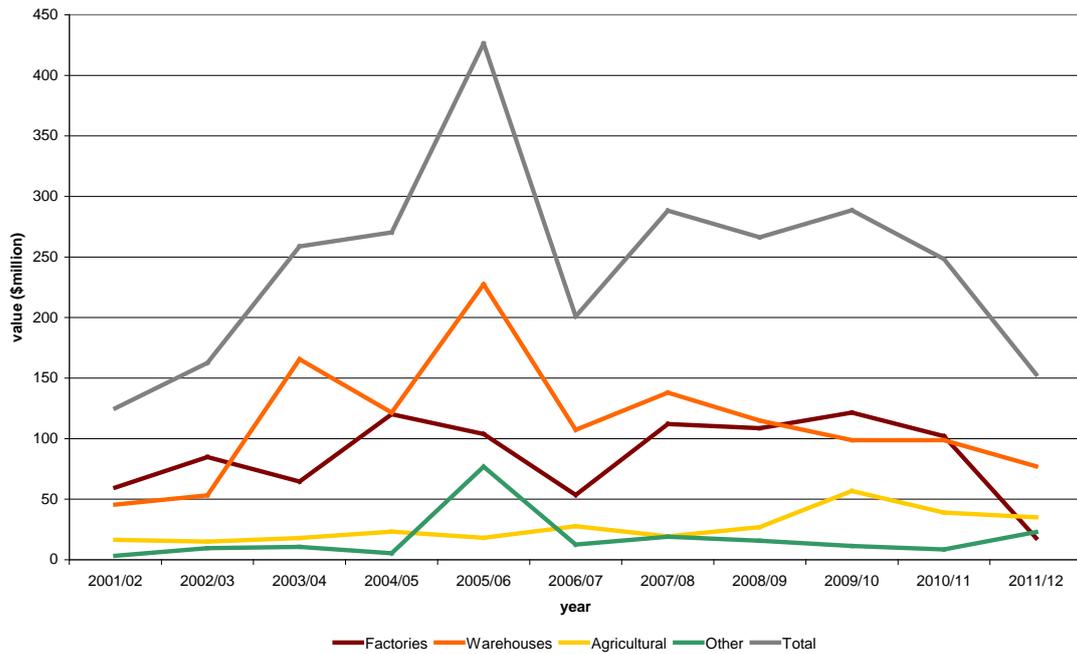
In recent times the stock of industrial zoned land in the inner areas of Adelaide has decreased because of rezonings to other uses. Between 2002 and 2008, 148 hectares of industry-zoned land was rezoned to non-industrial uses and between 2008 and 2012, a further 98 hectares of industry-zoned land was rezoned to non-industrial uses.

### 3.2.2 Industrial building projects approved

Overall there has been a drop in both the value and number of industrial buildings approved in South Australia since 2005-06. The value of industrial building approval activity for 2011-12 also dropped markedly (Figure 9); while the value of building approvals for both factories and warehousing has also declined in recent years.

It should be noted that the value of the industrial building approvals may be skewed by a few major building projects, so therefore the number of industrial building projects is a preferred indicator of the true level of industrial activity.

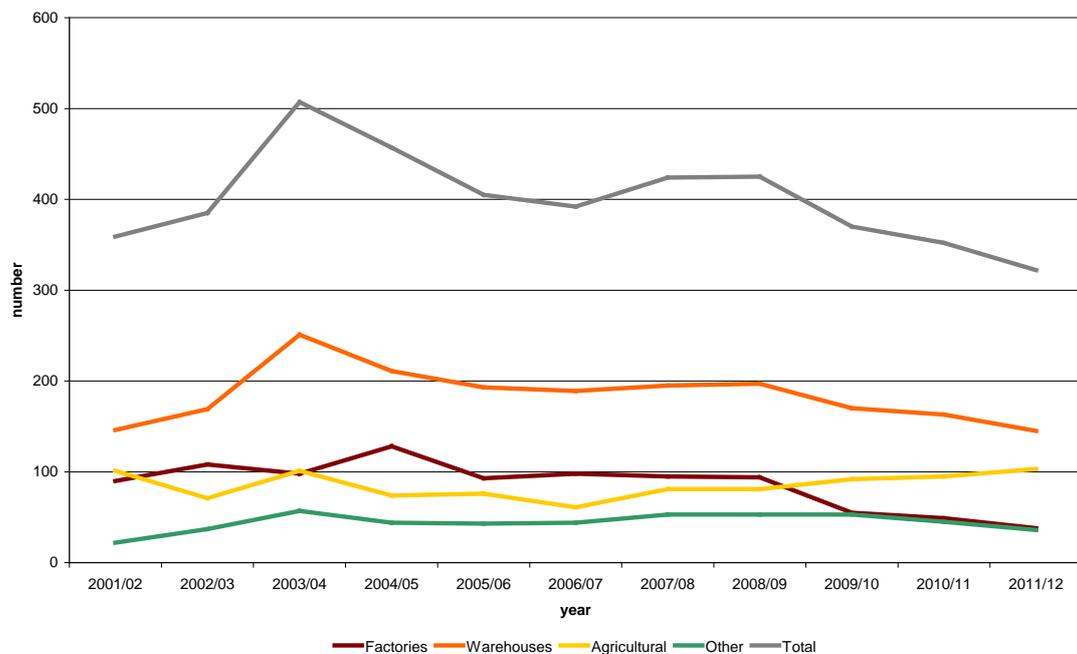
**Figure 9 Value of industrial building projects approved, South Australia**



Source: Australian Bureau of Statistics Catalogue No 8731.0, Table 55

The number of industrial projects approved (Figure 10) has dropped consistently since 2008-09 and is currently at approximately 70 per cent of the level at that time.

**Figure 10 Number of industrial building projects approved, South Australia**



Source: Australian Bureau of Statistics Catalogue No 8731.0, Table 63

### 3.3 Industrial land demand

Between 2002 and 2008, the annual consumption rate for industrial land in Greater Adelaide was estimated to be 100 to 110 hectares.

Future demand calculations are based on estimates of industrial employment from The 30-Year Plan. These estimates suggest that industrial employment (that is, employment related to manufacturing and transport, logistics and warehousing) will increase by 77,600 jobs over the next 30 years approximately. This represents 27.5 per cent of the total estimated employment growth predicted for Greater Adelaide in this period.

For planning purposes, the forecast growth in jobs has been converted to land demand requirements, see Table 11 (for details see the 2010 HELSP report, page 154). This calculation shows that 3329 hectares will be required over 30 years, equating to 1665 hectares over 15 years and almost 111 hectares per year.

**Table 11 Estimated land area required based on employment growth over 30 years (assuming re-allocation of demand based on availability) in Greater Adelaide**

<b>Greater Adelaide region</b>	<b>30-year demand (ha)</b>	<b>15-year demand (ha)</b>	<b>1-year demand (ha)</b>
Northern Adelaide	1 021	510	34
Western Adelaide	1 242	621	41
Eastern Adelaide <sup>20</sup>	0	0	0
Southern Adelaide	636	318	21
Barossa, Light and Lower North	214	108	7
Adelaide Hills (inc. Murray Bridge)	160	81	5
Fleurieu	58	30	2
<b>Greater Adelaide (total)</b>	<b>3 329</b>	<b>1 665</b>	<b>111</b>

As can be seen, the combined Western and Northern Adelaide regions make up nearly 70 per cent of the estimated demand, followed by the Southern Adelaide region with 19 per cent.

<sup>20</sup> The area recorded here has been adjusted due to the lack of supply in Eastern Adelaide. To produce a more accurate indication of industrial land demand, Eastern Adelaide's estimated demand has been re-allocated elsewhere in Greater Adelaide. The table shows the re-allocation, in proportion to the estimated industrial employment growth by region.

### 3.4 Industrial land supply

#### 3.4.1 Overview

The supply of developable land by ownership and region (based on the 2008 Industrial Database) outlined in the 2010 HELSP report is provided in Table 12.

**Table 12 2008 Assessment of developable land supply, Greater Adelaide**

Greater Adelaide region	Private ownership (ha)	Government ownership (ha)	Total (ha)	Private ownership discounted by 50% (ha)	Government ownership (ha)	2008 industrial land supply discounted by 15% (ha)
Northern Adelaide	349	421	770	175	421	506
Western Adelaide	190	406	596	95	406	426
Eastern Adelaide	3	6	9	2	6	6
Southern Adelaide	465	80	545	233	80	266
Barossa, Light and Lower North	61	6	67	31	6	31
Adelaide Hills (inc. Murray Bridge)	89	7	96	45	7	44
Fleurieu	65	0	65	33	0	28
<b>Greater Adelaide (total)</b>	<b>1 223</b>	<b>926</b>	<b>2 148</b>	<b>611</b>	<b>926</b>	<b>1 306</b>

In 2008, privately owned developable industrial land accounted for 1223 hectares and government-owned stocks amounted to 926 hectares.

Privately owned land supplies were discounted by 50 per cent to allow for issues such as withholding. Government supplies remain at 926 hectares because the government has control over this land and there is greater certainty that it will be developed and released in the longer term.

An additional 15 per cent discount was applied to the total supply of private and government land to account for roads, community facilities and other land uses within development areas.

After discounting, the overall supply of developable industrial land (as at 2008) was 1306 hectares. 926 hectares (62 per cent) was government-owned. At a projected annual consumption rate of 111 hectares, this equates to slightly less than 12 years' supply. This is approximately 359 hectares below the 15-year supply target of 1665 hectares.

### 3.5 Demand-supply analysis

Land consumption for this report is based on a survey conducted in July 2012<sup>21</sup>. This survey, in conjunction with an assessment of the gains and losses of industrial land through rezoning, provided an indication of industrial land consumption since the completion of the 2008 Industrial Database. The survey did not consider brownfield sites that came onto the market in the interim period because this would have required a complete census of all industrial zones. A more detailed review of brownfield sites is scheduled for the next HELSP program cycle.

Table 13 summarises the changes in the supply of developable industrial land through rezonings and consumption that took place between 2008 and 2012. The table starts with the 2008 industrial land stocks, subtracts the land lost to rezoning to other uses over the period 2008 to 2012, adds the land gained through rezoning over 2008 to 2012, and then subtracts the amount of land consumed by industry to arrive at an estimate of the industrial land supply in 2012.

**Table 13 Developable land supply and consumption for Greater Adelaide, 2008-2012**

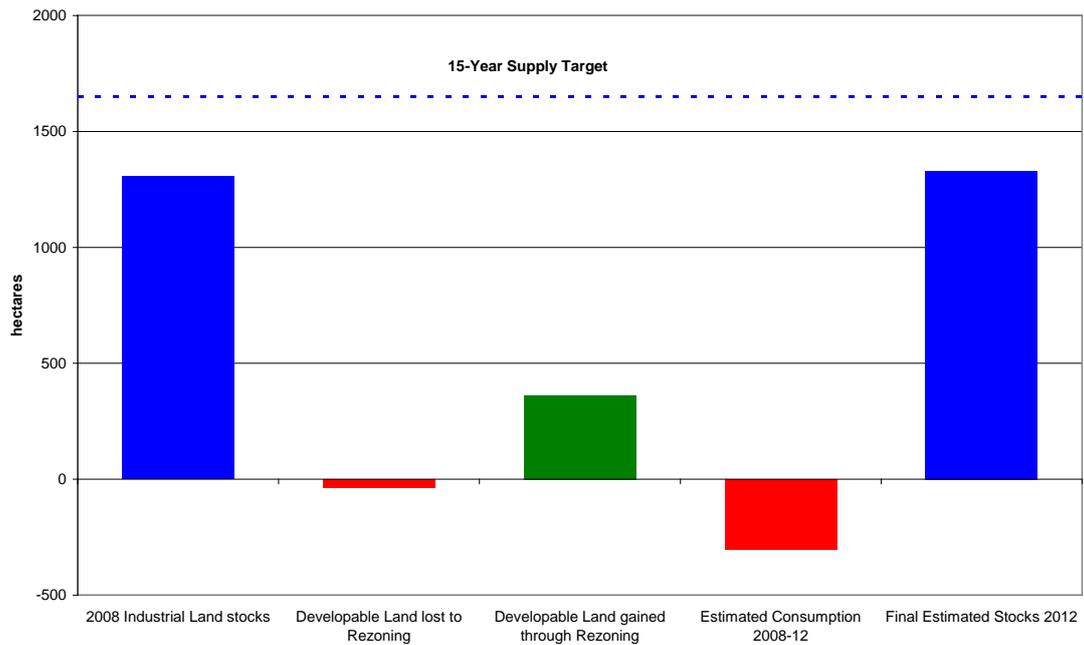
<b>Greater Adelaide region</b>	<b>2008 industrial land stocks</b>	<b>MINUS 2008-12 developable land lost to rezoning</b>	<b>PLUS 2008-12 developable land gained through rezoning and land division of existing sites</b>	<b>MINUS 2008-12 estimated consumption</b>	<b>2012 estimated supply</b>
Northern Adelaide	506	12	156	82	568
Western Adelaide	426	15	77	81	407
Eastern Adelaide	6	5	0	1	0
Southern Adelaide	265	0	75	117	223
Barossa, Light and Lower North	31	0	13	9	35
Adelaide Hills (inc. Murray Bridge)	44	1	41	8	76
Fleurieu	28	3	0	4	21
<b>Greater Adelaide (total)</b>	<b>1 306</b>	<b>36</b>	<b>362</b>	<b>302</b>	<b>1 330</b>
Estimated number of years' supply	11.8				12.0

<sup>21</sup> The 2012 survey was constructed around a stratified sample of the 2008 Industrial Database (IDB) illustrating supplies of vacant land (the last complete census of industrial land undertaken by the South Australian Government). All vacant sites of more than one hectare were surveyed and a percentage of the smaller sites were sampled. This reduced the number of sites to be surveyed by more than 75 per cent (to fewer than 500 sites) while providing coverage of 95 per cent of the area.

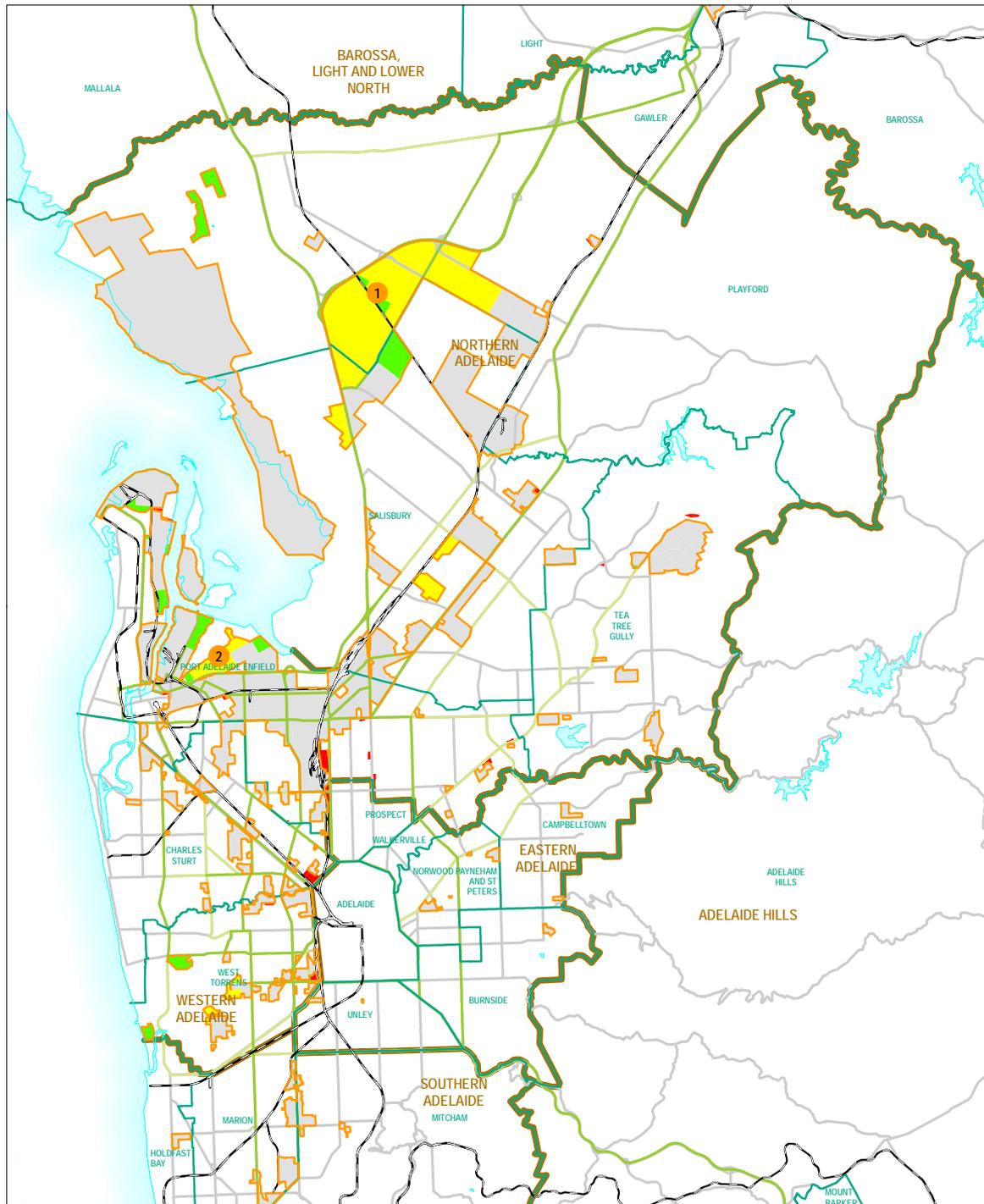
The developable industrial land consumption over the period 2008 to 2012 was 302 hectares. This is 142 hectares fewer than the 444 hectares needed to meet The 30-Year Plan’s forecast requirements (i.e. four years at 111 hectares a year).

Including the vacant land gained through rezoning, the 2012 stock of developable industrial land amounts to 1330 hectares or 12.0 years’ supply (based on the predicted consumption rate of 111 hectares a year). To meet HELSP’s target of 15 years’ rolling supply at any point in time, additional land will need to be identified for rezoning to industry (Figure 11).

**Figure 11 Developable industrial land supply, Greater Adelaide**



**Map 6 Greater Adelaide's industrial land rezonings 2008-2012**



**Metropolitan Adelaide  
Industry Zoning Changes  
2008 - 2012**



- Zoning changes**
- Industry unchanged
  - Non Industry -> Industry
  - Industry -> Non Industry
  - Scheduled for Rezoning to Industry
  - Industrial zones 2012

- South Australian Government Region boundary
- Local government boundary
- Primary freight road
- Secondary freight road
- Main road
- railway

- 1 Greater Edinburgh Parks
- 2 Gillman

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PLN ID: 4076

### **3.5.1 Selecting future stocks for industrial land**

Future sites need to be identified and rezoned to address the shortage of developable industrial land. The location of these sites is critical to the future success of industry in the Adelaide region and, while regional supplies are important, maintaining the overall supply overrides regional concerns.

Potential sites should take advantage of existing infrastructure and minimise additional government expenditure. A range of criteria needs to be applied to assist in identifying the most desirable locations.

In particular, future stocks should be located close to:

- ports
- services (power/water)
- airports
- railway interchanges / inter-modals
- major arterial roads / expressway junctions.

In addition, it is preferable that future sites:

- are of sufficient size to act as a buffer to future residential encroachment
- should be located centrally to potential labour markets to reduce journey-to-work times
- should be attractive to the industrial sector.

### **3.5.2 Potential sites for industrial rezoning**

To contribute to the 15-year supply target of 1665 hectares, the following two sites are under consideration for future rezoning (Table 14).

- 1550 hectares at Greater Edinburgh Parks (yielding 702 ha)
- 150 hectares at Gillman.

Both sites are ideally located, meet the key criteria and are close to the Northern Expressway, the railway and key existing supplies of industrial land and services. The immediate goal is to achieve the 15 years' supply target within the next five years and there is sufficient land in these locations to achieve this goal.

Note that with each subsequent year, 110 hectares of industrial land will be consumed and another 25 hectares per year will be lost to rezoning.

The future industrial land supply to be rezoned is an estimate of the developable land area that will come to market as a result of planned future rezoning (Map 6). (Note: private stocks have been discounted by 50 per cent to allow for withholding.)

**Table 14 Potential industrial land stocks for Greater Adelaide after rezoning, 2008-12**

<b>Greater Adelaide region</b>	<b>2012 estimated supply</b>	<b>PLUS future industrial land supply to be rezoned</b>	<b>Future estimated supply with rezonings</b>
Northern Adelaide	568	702	1 270
Western Adelaide	407	150	557
Eastern Adelaide	0	0	0
Southern Adelaide	223	0	223
Barossa, Light and Lower North	35	0	35
Adelaide Hills (inc. Murray Bridge)	76	0	76
Fleurieu	21	0	21
<b>Greater Adelaide (total)</b>	<b>1 330</b>	<b>852</b>	<b>2 182</b>
Estimated number of years supply	12.0		19.7

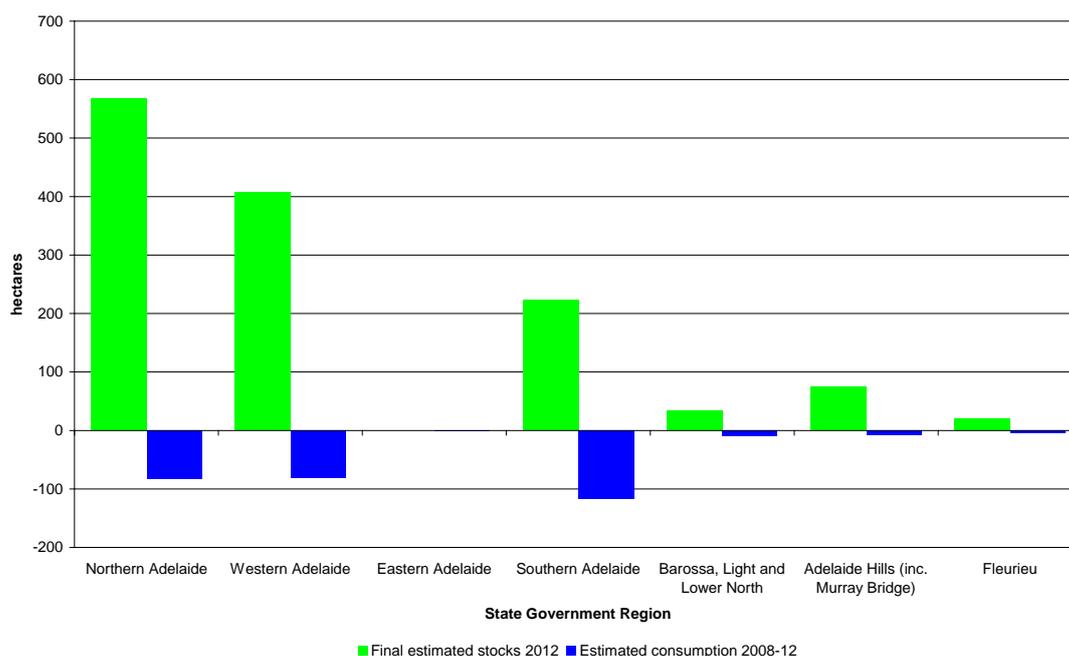
### 3.6 Regional analysis

The vacant industrial land survey provides a reliable indication of overall consumption of developable land in Greater Adelaide. However, data relating to the smaller geographical regions is less reliable. As a result, detailed mapping and parcel-by-parcel analysis of developable land at the regional level is beyond the scope of this report. This level of analysis will be undertaken in 2014 after a detailed industrial database study is completed.

Due to its nature and interaction with residential development, the possible locations of industrial activity are limited. The overall supply of developable industrial land is of prime importance and the main focus of government planning for industrial land development is in Northern Adelaide. Regional supplies provide local employment but future supplies are restricted in particular regions, for example in the Southern and Eastern Adelaide (Figure 12).

The total supply in Northern Adelaide amounted to 568 hectares in 2012. Estimated consumption over the four-year period 2008 to 2012 was 82 hectares which was below the assumed level of consumption (135 hectares) over this time. This reduction in consumption can be linked to restrained economic activity during and following the Global Financial Crisis, as well as a structural shift in the industrial manufacturing sector.

**Figure 12 Developable industrial land supply by region, Greater Adelaide, 2012**



The potential rezoning of Greater Edinburgh Parks will see Northern Adelaide become the principal focus for future industrial growth in Greater Adelaide. Major infrastructure works such as the Northern Expressway have been completed and others are planned. Northern Adelaide’s stocks alone would then be enough to cater for 12 years’ industrial growth across Greater Adelaide.

In the Barossa Light and Lower North region, industrial land consumption was 9 hectares in the four years to 2012. This is below the estimates outlined in the 2010 HELSP (28 ha). The region’s close proximity to Northern Adelaide will reduce any urgent need for additional industrial rezonings, even if consumption exceeds predicted levels in the immediate future.

Western Adelaide consumed 81 hectares over the 2008 to 2012 period, which was well below the estimated 164 hectares. With the potential rezoning of 150 hectares at Gillman in the short term, the stock of industrial land remains more than adequate for now.

The greatest industrial land consumption over the 2008 to 2012 period was in Southern Adelaide due to major government initiatives including the desalination plant and the railway extension to Seaford. Remaining stocks of developable industrial land in the region amount to 223 hectares, equating to about 10.5 years’ supply at a projected annual consumption rate of 21 hectares. In addition, developable stocks are tightly held, with little stock reaching the market. Of particular concern is the supply for local and service industries.

In summary, Southern Adelaide’s increase in developable land consumption has impacted on its supply. While there is little opportunity at this stage to extend industrial land holdings by rezonings in the region, there is a need to consider additional rezoning in the future, in particular for service industries.

Developable industrial land demand in the Adelaide Hills region and Murray Bridge amounted to 8 hectares over the 2008 to 2012 period. As in other regions of Greater

Adelaide, demand was less than the 21 hectares forecast, and most of the demand that was recorded was in the Mount Barker and Murray Bridge areas.

The Fleurieu region experienced consumption of 4 hectares, which was below forecast consumption. The majority of demand was in the Goolwa and Victor Harbor areas.

## 4. Retail

### 4.1 Overview

Retailing is vital for the vibrancy of cities and towns, and for the function of its centres. In 2006, SGS Economics and Planning prepared a report titled *Retailing Futures and Activity Centres Planning*, where it describes retail as ‘fundamental to the functionality of existing and future centres’.<sup>22</sup>

SGS Economics and Planning went on to say that, ‘It is important for government to understand how levers available to it can work to achieve well-located shopping and to integrate shopping with other uses in lively activity centres. However retailing is changing rapidly. It is a challenge for policy and controls to keep up with the evolution of retailing and to promote diverse uses within retail focussed centres.’<sup>23</sup>

In 2011, more than 98,070 people in Greater Adelaide were employed in the retail sector (including accommodation and food services), making it one of the region’s most significant employment sectors (Table 15). Importantly, the very nature of retailing, unlike many other sectors, means that jobs are spread across the Greater Adelaide region, providing local employment opportunities.

**Table 15 Number of people working in retailing, 2011 Census**

Greater Adelaide region	Type of retail		Total
	Trade	Accommodation and food services	
Northern Adelaide	14 946	5 496	20 442
Western Adelaide	11 654	5 093	16 707
Eastern Adelaide	16 018	12 120	28 138
Southern Adelaide	14 803	7 170	21 973
Barossa, Light and Lower North	2 420	1 523	3 943
Adelaide Hills	2 657	1 502	4 159
Fleurieu	1 542	1 166	2 708
<b>Greater Adelaide (total)</b>	<b>64 040</b>	<b>34 030</b>	<b>98 070</b>

The 30-Year Plan targets an additional 44,100 retailing jobs over 30 years (average of almost 1500 jobs per year). The most recent data for the intercensal period from 2006 to 2011 shows that the number of people employed in retailing in Greater Adelaide increased by an average of 900 people per year<sup>24</sup>. This is less than the targeted increase in retail employment.

The 30-Year Plan presents a typology for activity centres that is also a hierarchy for retailing in Greater Adelaide (Table 16) and provides the guide for its retail structure.

<sup>22</sup> SGS Economics and Planning, *Retailing Futures and Activity Centres Planning Discussion Paper*, report prepared by SGS for the Department of Sustainability and Environment, Government of Victoria, 2006, p.1.

<sup>23</sup> Ibid.

<sup>24</sup> Australian Bureau of Statistics, 2006 and 2011 Censuses, Employed Persons, Place of Work databases.

The 30-Year Plan identifies significant future growth areas in the Northern Adelaide and Barossa Light and Lower North regions and expansion of existing urban centres, most notably Mount Barker and the southern Fleurieu areas of Victor Harbor and Goolwa. These will have important implications for retail activity and the hierarchy. Increased retail activity will occur in a variety of other locations including transit corridors, transit orientated developments, mixed use zones (Table 16, Note b), and also within the established retail hierarchy.

**Table 16 Activity centre typology and retail hierarchy**

<b>Centre type</b>	<b>Description</b>
<b>Adelaide City centre</b>	Provides the primary cultural and economic hub for South Australia and Greater Adelaide. High quality specialty retail
<b>Regional centres</b>	Major strategic centres with a full range of retail services
<b>Major district centres</b>	Major retail and business centres serving immediate subregional residential population
<b>District centres</b>	Large centres providing a significant role for retail and also with office, community and entertainment facilities
<b>Bulky goods centres</b>	Centres concentrated on large DIY and household retail stores
<b>Specialist centres</b>	Include major airports, hospitals, universities and research/business centres – limited retail activity
<b>Neighbourhood centres</b>	Serve local residential communities and incorporate a retail function and services for daily/weekly needs
<b>Local centres</b>	Largely provide for daily retail needs of local neighbourhoods

*Note a: Based on Appendix 3 Activity centre typology in The 30-Year Plan for Greater Adelaide, DPLG, 2010.*

*Note b: ideal locations for mixed use developments include activity centres, transit nodes, areas surrounding employment nodes, parts of the city centre and urban regeneration areas.<sup>25</sup>*

<sup>25</sup> The 30-Year Plan for Greater Adelaide, DPLG 2010, glossary, page 220

## 4.2 Trends in retailing

'Retailing is a dynamic industry and many factors influence the nature and extent of change in this important sector of the economy. Key factors include the underlying growth in average per capita spending (reflecting economic prosperity and growth in disposable incomes) and increasing population levels. As a result of industry innovation and corporate and institutional factors, new retail formats are regularly introduced to the Australian retail scene by a combination of home-grown retailers and new retail entities from abroad.'<sup>26</sup>

Table 17 summarises some of the retail trends that are likely to impact on the Greater Adelaide region, both now and in the future.

**Table 17 The major retail trends affecting the Greater Adelaide region**

Subject	Changes and Trends
Changes in retail hierarchy	The nature of retail hierarchy, the nature of CBD retailing, shopping, deregulation of shopping hours, suburban shopping expansion, cost of parking, larger supermarkets, mixed use, factory direct outlets
Changes in social structure/lifestyle patterns	Declining household size, ageing, increased part-time employment, longer working hours, more women in the workforce, Deregulation of town centre style development.
Market segmentation-demand	Changes to population, growth, composition of population and consumer wealth. The impact of cheaper consumer goods imported from China is an example of a significant change affecting buying power.
Market segmentation – supply	Decisions by the retailer regarding location, type and quality of establishment are a calculated risk that impacts demand. The trend to the mass market/price driven retail of Bunnings and Harvey Norman illustrates this.
Corporate restructuring and impact on market	The decisions of the top four major retailers (Coles, Woolworths, Harvey Norman and David Jones) have consolidated retailing directions in recent years.
Change in retail format	Increasing size and influence of major supermarkets and small convenience stores, increase in bulky goods retail clusters, the change of retailing type in the CBD, the rise of specialist stores, the decline of the department store and the growing importance of the street shopping.
Change due to technology	The increased use of the internet from home particularly with certain products-electronics, sporting goods, books and music.
Pressure on retail business	The high Australian dollar and the internet will have an impact on certain types of retailing and the viability of shops with occupancy costs and for the broader market to sustain more floor space.

<sup>26</sup> Essential Economics Pty Ltd, Activity Centres Review Technical Report – Planning Strategy for Greater Adelaide, report prepared for DPLG, Government of South Australia, 2008. Executive Summary page ii.

### 4.3 Growth in retail floor space

In the 15 years after the 1991-92 ABS Retail Census there was a significant growth in retail floor space in Greater Adelaide, with average per capita provision increasing from 1.98 m<sup>2</sup> to 2.34 m<sup>2</sup> <sup>27</sup>. Other significant trends over this period are summarised below:

- Adelaide's floor space compared with other capital cities was relatively high
- retail floor space growth mainly involved the replacement of small supermarkets with larger ones, and a significant increase in homemaker shopping<sup>28</sup>
- growth outside higher order centres occurred faster than growth in the centres
- higher-order shopping centres (major district centres and above) still accounted for 50 per cent of total retail provision in Greater Adelaide
- bulky goods precincts accounted for about 10 per cent of total retail provision (noting that traditional centres also offer homemaker retail)
- food as a proportion of total shopping centre floor space was much higher at lower levels in the retail hierarchy than in the higher-order centres
- there was a close concordance between the retail roles of major centres in metropolitan Adelaide and the current policy designations given to each centre, with some exceptions e.g. West Lakes and Arndale (designated district centres) and Port Adelaide the designated regional centre
- retail, in small centres, was often displaced by commercial activities such as real estate, medical therapies and accounting which can result in a loss of local access to shops
- neighbourhood and local centres were also under threat from large scale retailing competition from large-scale retailing. Between 1999 and 2007, 12 small centres comprising 56 shops closed in the Adelaide metropolitan area.

Since the 2007 Retail Database (RDB) only five new retail centres have been built and they are all located north of the CBD. Only one (Blakes Crossing) is a traditional shopping centre (supermarket plus specialty shops). The other four centres concentrate mainly on bulky goods.

In Greater Adelaide it is expected that the new retailing formats, including homemaker and factory outlet centres, and large discount warehouses will continue to emerge.

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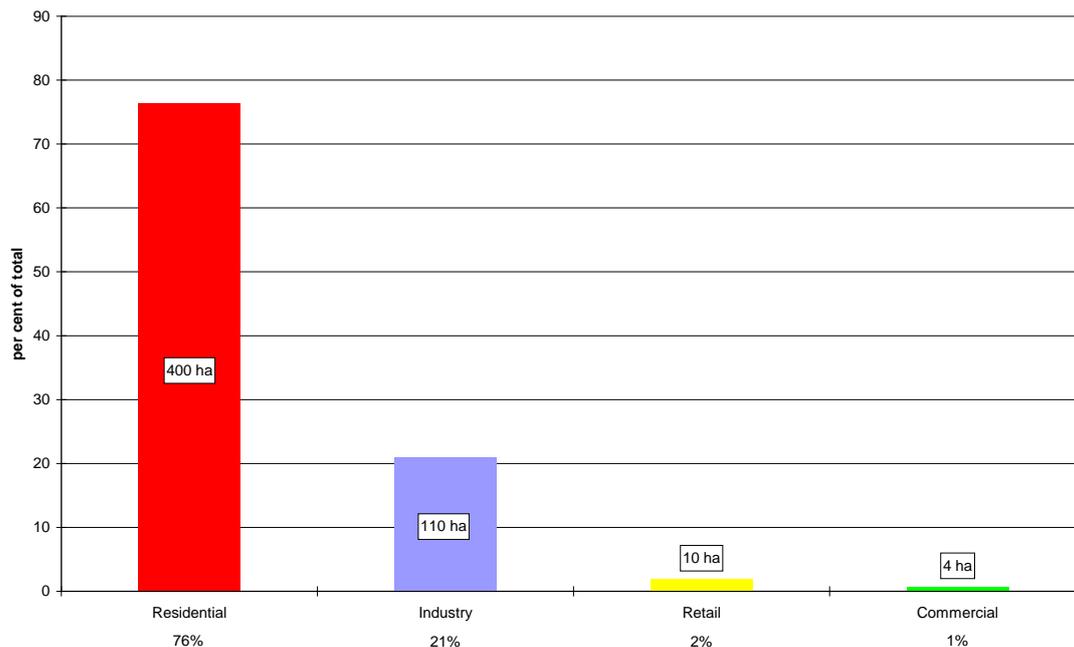
<sup>27</sup> Performance Benchmarking of Australian Business Regulations: Planning Zoning & Development Assessment – Productivity Commission, 2011 – Table H1, p 680

<sup>28</sup> 2010 HELSP Report, p 225

## 4.4 Retail land requirements

Retail demand is calculated on a floor space basis (square metres) which can be converted into land requirements (based upon car parking and open space around each retail facility). A very significant observation is that unlike residential or industrial, retail is a minor user of land accounting for roughly 10 hectares (approximately 2 per cent) of total urban land consumption per year (Figure 13).

Figure 13 Greater Adelaide annual land consumption, 2007



Source: DPTI, *Population, Land and Housing Analysis Unit, unpublished report.*

Another important observation in regard to the impact of retailing on land consumption is indicated by information from the Retail Database between 1999 and 2007:

- 55 per cent of new retail development was within the boundaries of, or adjacent to, existing centres (e.g. regional and district centres)
- 35 per cent of new retail development occurred on existing sites, that is, it required no additional land (e.g. redevelopment of existing sites or displacing other activities such as residential and commercial activities along arterial roads)
- 10 per cent of the requirement for new retail land was in new centres<sup>29</sup> (i.e. developing areas such as the fringe).

Analysis of retail provision in Adelaide shows that when measured in terms of average retail floorspace per capita, the current provision is at the high end of what would be expected, given similar indicators for other regions in Australia.

<sup>29</sup> Note: DPTI has very limited influence in existing centres, but does influence retail development in new centres.

To predict future retail requirements DPTI has had 2 sets of retail projections produced in recent years, they are as follows:

- **Essential Economics 2008, Activities Centres Review Technical Report<sup>30</sup>**
  - Projected a demand for new retail space of 460 ha, or about 16 ha per year over 29 years.
  - 1.6 hectares of the forecast 16 ha retail growth was projected to occur in the fringe and the remainder within or adjacent to existing centres or on existing sites.
- **Property & Advisory Pty Ltd 2012<sup>31</sup>**
  - The projected demand for fringe land (where new land in new centres is required) was 70 hectares over 29 years or 2.4 hectares per year.
  - An additional 569,000 m<sup>2</sup> of retail floorspace in infill areas (on 90 ha to 120 ha of land) within the CBD, existing centres and transit corridors.

The Property & Advisory Pty Ltd study provides the most likely outcome as it is more recent and has the advantage of observing recent changes in retailing, including the emergence of the Internet. However, the conclusion from both of these studies is that the demand per annum for new retail land will predominantly occur on the fringe with other demand mostly addressed through intensification within or adjacent to existing centres or on existing sites. Some opportunity may exist in transit corridors where there is active promotion of development.

The internet poses the largest potential constraint to future retail expansion in terms of 'bricks & mortar' and projected retail land requirements. Besides its convenience and wide range of goods on offer, it operates and trades 24 hours per day. In addition, as companies invest heavily in the internet they are offering other advantages such as quick delivery (often free) of purchases.

As internet sales continue to grow, it is possible that:

- aggregate demand for floorspace per person may reduce over time<sup>32</sup>
- there may be a consequential increase in demand for warehouse floorspace in industrial or commercial zones to address the growth in internet or online businesses
- the internet may impact on the composition of some centres and possibly their future viability.

#### **4.5 Retail land supply and planning implications**

To accommodate the potential retail land requirement, based on the analysis in the previous section, there are the following possibilities:

- The Adelaide CBD has significant potential to expand its aggregate retail offer through the redevelopment of existing sites (e.g. Harris Scarfe), the activation of streets and laneways, and new mixed-use developments.

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<sup>30</sup> Essential Economics Pty Ltd, *Activity Centres Review Technical Report – Planning Strategy for Greater Adelaide*, report prepared for DPLG, Government of South Australia, 2008.

<sup>31</sup> Property & Advisory Pty Ltd, *Retail Land Review*, unpublished report prepared for DPTI, Government of South Australia, 2012.

<sup>32</sup> Note: a reduction of 0.25 m<sup>2</sup> per person in a population of around 1 million, would equate to a reduction of 250,000 m<sup>2</sup> – which is about half of the current aggregate floorspace of all of Adelaide's regional centres

- Adelaide's principal regional centres also have significant unrealized development capacity, as illustrated by their Gross Leasable Areas (GLA) per hectare (Table 18). In these centres GLA varies from 5,900 m<sup>2</sup> at Marion to a low of 1,700 m<sup>2</sup> at Noarlunga Centre.

**Table 18 Principal regional centre development summaries**

Centre	Site Area (ha)	Total GLA (m <sup>2</sup> )	GLA per ha
Marion	23.0	135,800	5,900
West Lakes	27.0	62,000	2,200
Tea Tree Plaza	20.4	96,000	4,700
Colonnades	39.3	65,750	1,670
Elizabeth	23.1	83,000	3,590

Source: Property Council of Australia

- Some district centres also have ready potential to provide additional floorspace, as do some neighbourhood centres.
- Bulky goods developments will continue, although the completion of several recent homemaker centres (plus developments at Mount Barker and Edwardstown) may satisfy some of the potential demand.
- The pending roll-out of Woolworths' new hardware chain, and other proposed retail chain expansions, will generate significant new floorspace over time. It is likely that some of this land will come from existing industrial land stocks and be rezoned for the new uses.
- The traditional retail strips such as Jetty Road, Norwood Parade, Semaphore Road, et al have limited capacity for additional retail space due to fragmented ownerships and the generally high intensity of existing development and the close interface with often historic residential areas. In these locations it is likely that existing retail floorspace may be redeveloped as a part of a mixed-use development.
- In greenfield developments, land will be allocated as required through the structure planning process and the key issues will be the designation and spatial distribution of District and Neighbourhood Centres. As a broad benchmark guide to future requirements a major supermarket requires a catchment of up to 10,000 residents in order to be sustainable.
- Local centres usually cater for a population of between 1,500 and 3,000 persons. Their spatial area of influence is approximately 500-750 metres, and they cater for the day-to-day needs of the local population providing convenience facilities such as a super deli, takeaway food, hairdresser, video shop, butcher or greengrocer.

## 4.6 Future requirements

The current trends indicate that demand for 'bricks and mortar' or (traditional 'shop-faced') retailing is slowing. Furthermore, the potential of the internet means that it is likely that a smaller percentage of total expenditure will end up in 'bricks and mortar' retail stores than would previously have been the case. Over the next 10 to 20 years, retailing will occur in an environment where:

- The current rate of provision of retail floorspace is expected to be within the range nominated by the Productivity Commission<sup>33</sup> and there is no immediate pressure for it to rise.
- 'Bricks and mortar' stores will remain as the mainstay of retailing regardless of the impact of the internet. If the internet captures 30 to 40 per cent of total sales over the next 20 years, this would still leave 60 to 70 per cent of the market to be serviced by traditional means.
- Based on the previous point, demand for new retail space will likely moderate (for a time at least) to the extent that it will be more closely tied to population growth, without there being any push to substantially increase the underlying rate of floorspace provision per head.
- The major retail chains are likely to continue to increase their dominance by pushing into new sectors and growing their market share. This may impact of the on the sustainability of some of the smaller centres.

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<sup>33</sup> Productivity Commission, Performance Benchmarking of Australian Business Regulations): Planning Zoning & Development Assessment, 2011, p679.

## 5. Future directions

Each HELSP monitoring report is a summary of activity towards achieving targets established in *The 30-Year Plan for Greater Adelaide*.

Other activities in 2013 include:

- ongoing development of methods and processes to quantify dwelling potential from major infill developments
- ongoing work to produce a revised set of population projections for South Australia and its regions based on the results of the 2011 census
- further research and analysis to better understand housing demand and housing sub-markets in Greater Adelaide
- an analysis of employment data from the 2011 census results
- consider how an online system might support HELSP monitoring and information distribution processes
- expanding the vacant industrial land survey to include brownfield industrial sites as a part of the 2013 HELSP monitoring cycle.

Ongoing research and analysis into the factors contributing to land supply and demand must continue to be a crucial part of the HELSP program cycle.



# Appendix A

**Table A1 Estimated dwelling site supply from programmed developments (major broadhectare and infill projects) by region**

<b>Greater Adelaide region</b>	<b>Short term (0-5 years)</b>	<b>Medium term (6-10 years)</b>	<b>Long term (11-15 years)</b>	<b>Total (0-15 years)</b>
Northern Adelaide	9 867	6 731	1 885	18 483
Western Adelaide	3 463	1 242	150	4 855
Eastern Adelaide	4 550	1 287	127	5 964
Southern Adelaide	4 997	2 905	1 367	9 269
Barossa, Light and Lower North	4 632	3 447	781	8 860
Adelaide Hills	1 377	332	0	1 709
Murray Bridge	509	0	0	509
Fleurieu	2 880	2 096	400	5 376
<b>Greater Adelaide (total)</b>	<b>32 275</b>	<b>18 040</b>	<b>4 710</b>	<b>55 025</b>

**Table A2 Estimated dwelling site supply from minor infill development by SAGR**

<b>Greater Adelaide region</b>	<b>Short term (0-5 years)</b>	<b>Medium term (6-10 years)</b>	<b>Long term (11-15 years)</b>	<b>Total (0-15 years)</b>
Northern Adelaide	3 000	3 250	3 500	9 750
Western Adelaide	3 000	3 000	3 000	9 000
Eastern Adelaide	1 500	1 500	1 500	4 500
Southern Adelaide	2 750	2 750	3 000	8 500
Barossa, Light and Lower North	200	200	200	600
Adelaide Hills	150	150	150	450
Murray Bridge	150	150	150	450
Fleurieu	250	250	250	750
<b>Greater Adelaide (total)</b>	<b>1 1000</b>	<b>11 250</b>	<b>11 750</b>	<b>34 000</b>

**Table A3 Estimated dwelling site supply from Greater Adelaide growth areas**

<b>Greater Adelaide region</b>	<b>Short term (0-5 years)</b>	<b>Medium term (6-10 years)</b>	<b>Long term (11-15 years)</b>	<b>Total (0-15 years)</b>
Northern Adelaide	900	4 000	6 200	11 100
Western Adelaide	0	0	0	0
Eastern Adelaide	0	0	0	0
Southern Adelaide	300	800	800	1 900
Barossa, Light and Lower North	500	1 000	3 350	4 850
Adelaide Hills	800	2 000	3 000	5 800
Murray Bridge	200	300	600	1 100
Fleurieu	0	1 500	1 500	3 000
<b>Greater Adelaide (total)</b>	<b>2 700</b>	<b>9 600</b>	<b>15 450</b>	<b>27 750</b>



## Shortened forms

ASD	Adelaide Statistical Division
ABS	Australian Bureau of Statistics
CBD	central business district
DPA	Development Plan Amendment
DPLG	Department of Planning and Local Government
DPTI	Department of Planning, Transport and Infrastructure
GLA	Gross leasable area
ha	hectares
HELSP	Housing and Employment Land Supply Program
NOM	net overseas migration
SAGR	South Australian Government Region
TOD	transit-oriented development



# Glossary

Activity centre	Activity centres provide concentrations of business, administrative, civic, retail, entertainment, employment, research, education and community uses, and – increasingly – residential development. The purpose of activity centres is to cluster commercial and employment activity to improve accessibility, productivity and the efficient use of infrastructure. Many of the traditional activity centres in metropolitan Adelaide, which are adjacent to major public transport access, will become transit-oriented developments through the inclusion of more residential development over the life of <i>The 30-Year Plan for Greater Adelaide</i> . The Adelaide City centre, encompassing the central business district, is the pre-eminent activity centre in the Greater Adelaide region.
Adelaide Statistical Division	A Statistical Division (SD) is an Australian Standard Geographical Classification (ASGC) defined area which represents a large, general purpose, regional type geographic area. The Adelaide Statistical Division extends from Gawler in the north to Sellicks Beach in the south and includes part of the Adelaide Hills to the east.
Affordable housing	Affordable housing is housing that is appropriate to the needs of households with low and moderate incomes (that is, up to 120 per cent of gross annual median income). The indicative affordable house purchase price for these groups – currently \$225,000 – is determined by the affordability indicators gazetted on 8 October 2009 (p. 4818) or as amended from time to time under the <i>Development Act 1993</i> and South Australian Housing Trust (General) Regulations 1995.
Broadhectare land	Residentially zoned land greater than 4000 square metres with potential for subdivision. Formerly referred to as “broadacre” land
Brownfield site	Abandoned or under-utilised industrial sites.
Bulky goods retail	Larger premises used primarily for the sale of goods and items which are predominantly of a size, shape or weight as to require an extensive area for handling, storage or display.
Clusters	Geographically proximate groups of interconnected companies and associated institutions in a particular field with common and complementary interests. They form over time and draw on shared infrastructure and on an available pool of skilled workers.
Consumption rate	The average annual quantity of land consumed for a particular purpose, such as residential, industrial, retail or commercial.
Density	Density is a measure of the population (persons) or the number of dwelling units in a given area.
Development Plan	The principal development assessment document in South Australia. With the exception of Commonwealth-owned properties, Development Plans describe the land use and development rights that apply to all land in South Australia.
Development Plan Amendment (DPA) Report	The statutory document used for creating or amending planning policy in the Development Plan.
Dwelling sites	Represent the supply of residential development opportunities from all forms of development (broadhectare land division, redevelopment projects, apartments and aged care). While the term 'lots' is commonly used to describe allotments produced by the land division process, it was felt that it did not adequately describe the full range of dwelling site opportunities in the form of apartments, aged care and other community titled developments.
Employment lands	Concentrated areas where people are employed on a full- or part-time basis in a wide range of employment industry categories including: agriculture; mining; electricity; construction; wholesaling; communication; finance; property; government; cultural and personal services; education, health and community services; manufacturing; retailing; accommodation; and cafes and restaurants.
Future industry land	Land that is intended to be zoned industrial at some time in the future, but does not allow for industrial development now.
Greater Adelaide region	Adelaide and Outer Adelaide Statistical Divisions (excluding Kangaroo Island). Seven South Australian Government Regions fit within the Greater Adelaide region. This report covers the Greater Adelaide region and Murray Bridge.
Greenfield	See 'broadhectare land'.
Growth areas	Areas identified in <i>The 30-Year Plan for Greater Adelaide</i> for urban expansion that will be subject to further intensive investigations and public consultation.
Home industry zoned land	Land in a zone primarily accommodating dwellings sited on allotments of low-density, with small-scale industrial or business home employment enterprises on site run by a person resident on the site.

Industrial Database	The 2008 Industrial Database was produced by DPLG and covers the Greater Adelaide region, plus the transport corridors extending to Port Wakefield to the north and Tailem Bend to the south-east. It contains a complete listing of all industrial sites located in industrial zones as well as any sites with an industrial land use outside these zones. The information has been entered into a GIS enabling mapping and spatial analysis. The 2008 update is the third edition of the database, the first two versions having been released in 1996 and 2002.
Industrial land	Land that is used for industrial purposes that may or may not be zoned industry.
Industry land	Land that is zoned industry.
Major infill development	Developments of more than 10 dwellings.
Metropolitan Adelaide	See 'Adelaide Statistical Division'.
Minor infill development	Developments of 10 dwellings or fewer.
Occupied land	All land other than vacant land. Occupied land includes reserves and agricultural properties.
Programmed development	Residential development areas with known development intentions.
Resubdivision	Involves the creation of new allotments from existing residential parcels.
Retail Database	The 2007 Retail Database was produced by DPLG and contains detailed information about the location, size and activity mix of retail outlets throughout the metropolitan Adelaide region and major nearby townships, including Victor Harbor and Murray Bridge. The information has been entered into a GIS, enabling mapping and spatial analysis. The 2007 update is the third edition of the database; the first two were released in 1993 and 1999.
South Australian Government Region (SAGR)	Consistent with <i>The 30-Year Plan for Greater Adelaide</i> , the region's SAGRs are: <ul style="list-style-type: none"> <li>▪ Northern Adelaide</li> <li>▪ Western Adelaide</li> <li>▪ Eastern Adelaide (including the City of Adelaide)</li> <li>▪ Southern Adelaide</li> <li>▪ Barossa (including Gawler)</li> <li>▪ Adelaide Hills (including Murray Bridge)</li> <li>▪ Fleurieu.</li> </ul>
Structure Plan	A planning tool that sets out in broad terms an integrated vision for the future development of an area.
The Plan	<i>The 30-Year Plan for Greater Adelaide</i> , a volume of the South Australian Planning Strategy.
Transit corridor	The Plan is based on concentrating urban development around access to public transport. The Plan identifies two types of transit corridors: <ul style="list-style-type: none"> <li>▪ Five major transit corridors which are characterised by fixed-line mass transit (rail, tram and O-Bahn). Future opportunities for development will generally be within 800 metres of either side of these fixed-line transit corridors.</li> <li>▪ Other transit corridors which are characterised by main road access and either have or are earmarked for mass transit such as frequent bus or light rail.</li> </ul> Structure Plans will identify where, when and how transit corridors will be developed. Most development within transit corridors will be concentrated around activity centres and major public transport access points.
Transit-oriented development (TOD)	Transit-oriented developments consist of mixed-use, higher density development centred on a major public transport access point. They accommodate residential, high-order retail services and employment activities as well as high quality open space. They will be attractive and walkable places for people to live, work, shop and recreate in an accessible and self-contained community.
Vacant land	Vacant land for the purposes of this report has been defined as: <ul style="list-style-type: none"> <li>▪ unoccupied land</li> <li>▪ land with vacant buildings</li> <li>▪ land with derelict buildings.</li> </ul>