



UDIA NSW Housing Accord Progress Report

Q1 2024

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NSW

 **MOSAIC**
By Mecone

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The data collected on NSW local development applications is sourced from the NSW Planning Portal (planningportal.nsw.gov.au). The NSW Planning Portal is an online environment where community, industry and

government can work together to better understand and meet their obligations under the Environmental Planning and Assessment Act 1979.

The Portal hosts a range of digital planning services, mapping tools and reporting tools to assist everyone involved in a proposed development.

The digital services accessed via dashboards and API help improve application determination times, increase transparency of the planning system, and ensure greater accountability of all stakeholders.

Data has been extracted and transformed for the purpose of this report.



Acknowledgement of Country

UDIA NSW & Mecone Group Acknowledge the Traditional Owners of Country throughout Australia and their continuing connections to land waters and community.

We show our respect to elders past and present. We acknowledge that we stand on Country which was and always will be Aboriginal Land.



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Executive Summary – Quarter 1 Report

The worsening housing crisis is rapidly emerging as Australia's most urgent issue, affecting affordability in both the ownership and rental markets, while also generating profound social and economic consequences. In response to these challenges, and more than two years since the Federal Government's National Housing Accord announcement, the NSW Government has adopted state-wide housing targets aimed to substantially increase levels of housing stock.

The NSW Government has set a housing target of 322,000 new homes across Local Government Areas (LGAs)¹ in the Greater Sydney Megaregion over the next 5 years and implemented several planning reforms to support meeting this target. The State also set a target of 55,000 new dwellings over the same period for the balance of NSW.

In this context, the Urban Development Institute of Australia NSW (UDIA) has initiated a report to track the NSW Government's progress in meeting the 322,000 new dwellings target, using data on Development Applications (DAs) for residential projects. This report has been developed in collaboration with planning and development consultancy Mecone, and measures progress against the state's share of the Housing Accord target by tracking the number of DAs determined in the reporting period.

Tracking determined Development Applications (DA) is the most reliable data set arising out of the NSW Planning Portal. This is predominately due to data limitations with new housing completion datasets across the entire Greater Sydney Megaregion, including time lag, varying consistency between regions, and closed data sets.

The analysis also factors in the lead-in delivery times for new dwelling stock being on average 18 months from DA determination by starting the analysis 18 months before the Accord's start date (January 2023) and comparing the target to 18 months before the Accord's end date (January 2028), noting it will take an average of 18 months after a DA determination for a dwelling to be realised.

This report finds that if we continue on the current DA approval trajectory, we forecast a theoretical maximum of 257,254 dwelling completions in the Sydney Megaregion during the Housing Accord period. Further, it is likely a significant number of these DAs will not

proceed through to delivery for a range of reasons, such as financial feasibility. Historically up to 20% of DAs do not progress to construction and if this trend continues over the Housing Accord period in NSW, we forecast a theoretical maximum of 205,000 dwelling completions in the Sydney megaregion, during the Housing Accord period. This figure also assumes these sites will not be further delayed by a lack of enabling infrastructure or the need for additional planning approvals.

UDIA's first edition of the National Housing Pipeline (NHP)[®] report for New South Wales, released in September 2024, assessed developable land capacity across Australia's key housing regions by examining the technical and planning constraints impacting development and confirming the actual barriers to housing delivery. This was conducted through a developer intentions survey, where developers revealed how much housing they will deliver over a 15-year timeframe. The report identified real concerns around the capacity for NSW to meet its housing targets, confirming that around 1 in 3 planned new homes (or 55,000 homes in total) forecast to be delivered over the National Housing Accord period are facing issues or delays as a direct result of a lack of committed, funded, or completed enabling infrastructure, or where they require additional post DA planning approvals.

While it is acknowledged that a number of these issues may be resolved during the National Housing Accord period, it remains a significant likelihood many of these issues will not be resolved in time for new homes to be completed within the Housing Accord period.

To ensure a steady flow of housing and to meet housing targets, every LGA and the Greater Sydney Megaregion needs to approve new DAs to keep up with the growing demand for homes. As this first report shows, the undersupply of housing stock relative to the Housing Accord targets is likely to continue over time and could worsen, unless additional measures are taken to boost supply.

The UDIA remains concerned that the Greater Sydney Megaregion is already behind in meeting its Housing Accord target, with these initial findings demonstrating that more reform is urgently needed to achieve these targets.

¹ While Regional NSW's contribution to the accord targets has been identified by the NSW Government, it has not allocated this contribution to individual Local Government Areas.

Key Findings

Key findings for the first quarter of the Housing Accord (July – September 2024), are:

1. Of the 43 LGAs of the Sydney Megaregion, 26 are tracking behind the level of development activity needed to meet their housing targets, with only very small Councils with smaller targets performing well.
2. The report shows the Sydney Megaregion is already 25,000 dwelling approvals behind the point in time target required to reach its five-year 322,000 home Housing Accord target.
3. Applying a historical DA to dwelling conversion rate and assuming the current DA approval trajectory continues, UDIA NSW forecasts a theoretical maximum of 205,000 dwelling completions in the Sydney Megaregion during the Housing Accord period. This assumes none of these sites are further delayed by a lack of enabling infrastructure or the need for additional planning approvals.
4. The vast majority of DAs already determined are existing pipeline DAs rather than new DAs (i.e., those attributable to the Transport Oriented Development or Low Rise Policies).
5. Development activity in the newly created TOD Tier 2 Precincts is still mostly for detached housing types and complying development applications, rather than high-density projects which are a result of the introduction of the TOD policy.

Note: Once the Government's Low and Mid Rise Housing reforms are finalised, this report will also track DAs in locations where this policy has been applied, noting the Government's stated ambition that these reforms will deliver 112,000 new homes over the five year Housing Accord period.



The Bower by McCloy Group

Local Government Area Summary

LGA's in the Greater Sydney Megaregion have been assigned 5-year dwelling targets as part of NSW's share of the Housing Accord. While local councils don't fund or deliver housing, their responsibility is ensuring enough land is zoned and designated with planning controls that enable feasible housing delivery. They also oversee the processing of applications for housing developments, which is fundamental to achieving housing production targets within the timeframe needed.

This section looks at the capacity for LGAs to achieve their 5-year dwelling targets by reviewing their performance in determining DAs to keep abreast of housing demand. It uses data from the NSW Planning Portal that identifies how many new dwellings are proposed as part of a development application and compares this to the overall and annualised dwelling targets.

Due to data limitations with housing completion datasets across the entire Greater Sydney Megaregion (including time lag, varying consistency between regions, and closed data sets), determined DAs are being used as an indicator of performance. Accounting for the Department of Planning, Housing and Infrastructure's advice of the likely split between "Planned" and "Projected" dwellings to be delivered in each LGA, UDIA's analysis includes DAs determined in the 18 months prior to the Accord start date on the basis this is the average lead-in delivery times for new dwelling stock being as much as 18 months from DA determination. Using the same logic, our reporting assumes any DA approved in the last 18 months of the National Housing Accord period will not deliver a completed home within the Accord reporting period.

Timeframes applied for this Report:

Development Approvals Required to Support the National Housing Accord Targets

January 2023

< Time frame >

January 2028

Completions contributing to the National Housing Accord

June 2024

< Time frame >

June 2029



LGA Progress Towards Meeting Housing Targets

While all LGAs are making progress, some are clearly doing better than others in meeting their Development Applications. At one end of the spectrum, the Ku-ring-gai area has only reached 12% of their overall target, while Blue Mountains is up to 84%. Overall, the Greater Sydney Megaregion is only at 27% of its combined target. However, at this point in the Accord reporting period, around 35% of total DAs would need to have been approved, meaning the megaregion is already tracking 22% below its target to date.

The differences in performance are due to each area having its own comparative advantages, disadvantages and pressure points. However, two key trends emerge:

1. The LGAs doing comparatively well also have low overall housing targets, indicating that targets in these areas may have been set too low.

2. Most areas are lagging well below half of approved development applications needed at this point in time to reach the Housing Accord target, indicating that a broader range of reforms, incentives and disincentives may be required to achieve housing targets.

Importantly, not all approved applications for planned housing will proceed through to construction and delivery for a range of reasons, such as financial feasibility and market conditions. This results in an attrition rate where a portion of expected dwellings are never constructed or delivered. Historically up to 20% of DAs will not commence to construction and as such these targets are likely to be understated.

LGA Name	5 Year Dwelling Target ¹	DA Target (To Date) ²	Actual DAs (To Date) ³	Progress towards DA Target ⁴ (noting that 35% is the DA target to date)
LGAs Tracking below their 35% Target				
Ku-ring-gai	7,600	2,660	935	12%
Bayside	10,100	3,535	1,371	13%
North Sydney	5,900	2,065	793	13%
Strathfield	3,500	1,225	472	13%
Burwood	3,300	1,155	493	14%
Sydney	18,900	6,615	3,218	17%
Inner West	7,800	2,730	1,443	18%

LGA Name	5 Year Dwelling Target ¹	DA Target (To Date) ²	Actual DAs (To Date) ³	Progress towards DA Target ⁴ (noting that 35% is the DA target to date)
Hornsby	5,500	1,925	1,034	18%
Newcastle	11,100	3,885	2,194	19%
Campbelltown	10,500	3,675	2,196	20%
Canterbury-Bankstown	14,500	5,075	3,196	22%
Parramatta	19,500	6,825	4,442	22%
Blacktown	21,400	7,490	4,796	22%
Liverpool	16,700	5,845	4,103	24%
Fairfield	5,900	2,065	1,423	24%
Wollongong	9,200	3,220	2,251	24%
Willoughby	3,400	1,190	869	25%
Georges River	6,300	2,205	1,632	25%
Camden	10,200	3,570	2,709	26%
The Hills	23,300	8,155	6,238	26%
Kiama	900	315	264	29%
Wollondilly	5,500	1,925	1,689	30%
Cumberland	12,200	4,270	3,915	32%
Lake Macquarie	8,000	2,800	2,645	33%
Maitland	5,300	1,855	1,852	34%
Randwick	4,000	1,400	1,396	34%

LGA Name	5 Year Dwelling Target ¹	DA Target (To Date) ²	Actual DAs (To Date) ³	Progress towards DA Target ⁴ (noting that 35% is the DA target to date)
LGAs Tracking at or above their 35% Target				
Canada Bay	5,000	1,750	1,765	35%
Shoalhaven	4,900	1,715	1,759	35%
Waverley	2,400	840	869	36%
Lane Cove	3,400	1,190	1,231	36%
Port Stephens	2,100	735	788	37%
Ryde	11,600	4,060	4,654	40%
Central Coast	9,400	3,290	3,767	40%
Northern Beaches	5,900	2,065	2,415	40%
Penrith	8,400	2,940	3,458	41%
Shellharbour	3,800	1,330	1,615	42%
Cessnock	3,900	1,365	1,638	42%
Woollahra	1,900	665	830	43%
Hunters Hill	400	140	178	44%
Sutherland	6,000	2,100	3,240	54%
Hawkesbury	1,300	455	795	61%
Mosman	500	175	310	62%
Blue Mountains	600	210	508	84%
Sydney Megaregion Total	322,000	112,700	87,389	27%

Table 1 – LGA Progression Towards Meeting Housing Target

¹ Based on the 5-year housing completion targets developed in response to the NSW Government's commitment under the National Housing Accord.

² "To date" target is based on the 5-year housing completion target, proportioned to the end of the current quarter.

³ Number of new dwellings based on determined Development Applications and Complying Development Certificate applications between Jan 2023 and the end of the current quarter.

⁴ The proportion of the overall dwelling target that has been met based on New Dwellings determined during the study period.

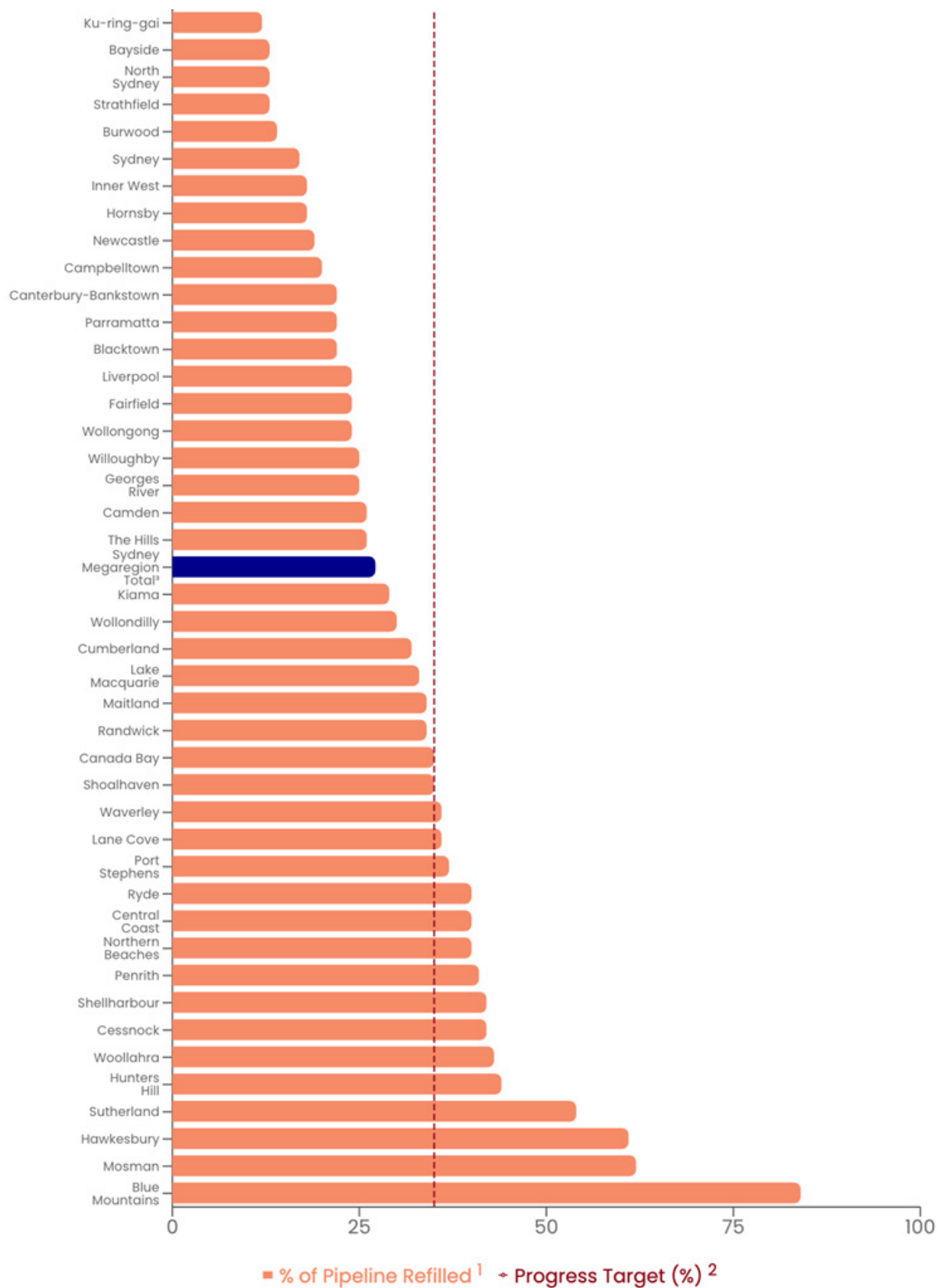


Chart 1 - LGA Progression Towards Meeting Housing Target

¹ The proportion of the overall dwelling target that has been met based on New Dwellings determined during the study period.

² The proportion of the dwelling target that should be achieved to-date based on the number of quarters progressed as a benchmark comparison (i.e., 35%).

New Dwellings Determined

While it may be possible for LGAs to meet housing targets if there is enough historically approved development ready DAs, enabling a stable pipeline of housing activity requires LGAs to continue to lodge and determine new DAs.

Tracking residential DAs against housing targets helps us see if enough new residential DAs are being approved to meet the Housing Accord targets. Data shows that the number of dwellings in approved developments isn't keeping up with the targets, and the gap between the target and actual approvals is growing each quarter. If we continue on the current trajectory, we are expecting the Government to determine 257,254 dwellings during the Housing Accord period. The blue dotted line on Chart 2 provides an estimate of how UDIA expects this to translate into completions applying a consistent 20% attrition rate (from DA determination to completion), which would total 205,803 dwellings.

With property developers also requiring lead-in delivery times for new dwelling stock being as much as 18 months, reasonable financial feasibility and ideal market conditions, the backlog of dwelling stock needed will likely be significantly more by the end of the Accord period, than it is today.

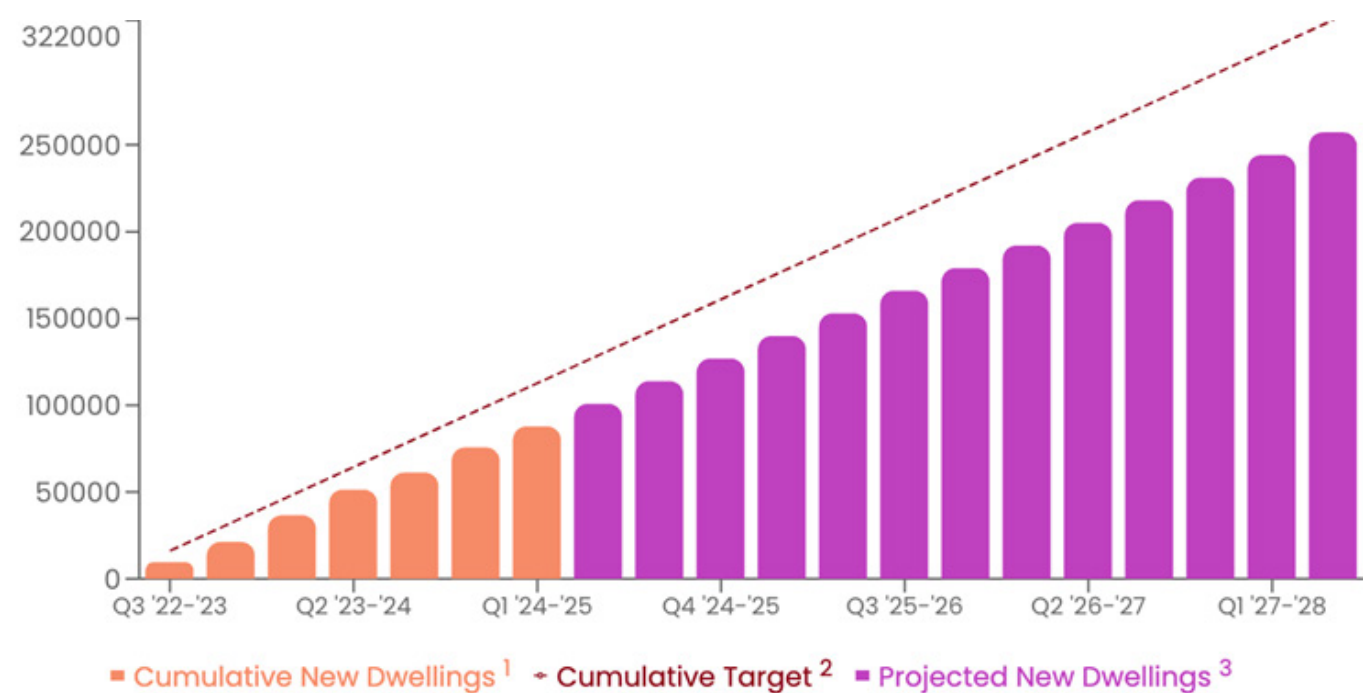


Chart 2 – New Dwellings Determined

¹ The cumulative number of new dwellings based on determined Development Applications and Complying Development Certificate applications across the Greater Sydney Megaregion per quarter submitted between Jan 2023 (to allow for developer lead-in times) and the end of the current quarter.

² The cumulative dwelling target based on the 5-year housing completion target proportionated to the end of the current quarter.

³ The projected cumulative dwelling target is forecasted based on the average quarter-to-quarter growth to date without assuming any attrition (i.e., no drop off between DAs determined and completions).

Development Applications Submitted and Determined

The future pipeline of housing projects will be reflected in the volume of residential development applications that are submitted and ultimately determined. Reviewing development application data shows that the number of residential identified development applications submitted and subsequently determined in recent quarters has been falling. While Q1 24/25 shows an increase in application submissions compared to Q4 23/24, **the number of applications for residential based developments is below the same quarter in the previous year.**

The fall observed in overall applications of this magnitude is likely to be a market signal that there are fewer projects in pre-delivery phases. This is a further indicator that the future pipeline of housing projects will likely slump, placing more pressures on achieving housing targets in future years.

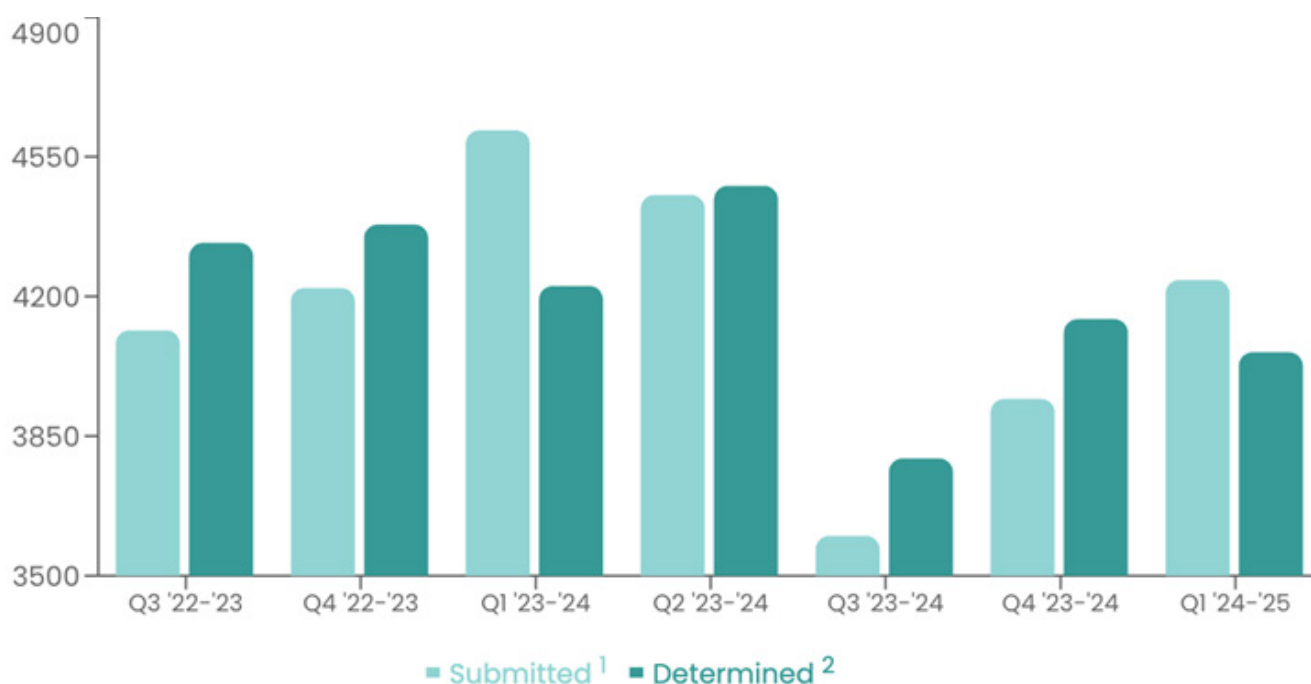


Chart 3 – Development Applications Submitted and Determined

¹ The number of Development Applications across the Greater Sydney Megaregion submitted per quarter between Jan 2023 and the end of the current quarter.

² The number of Development Applications across the Greater Sydney Megaregion determined per quarter between Jan 2023 and the end of the current quarter.

Development Applications Average Determination Time

The most recent quarter shows a decrease in assessment time frames for residential based development applications across the Greater Sydney Megaregion, down from a turnaround time of over 120 days on average, to 109 days. This is a well-received improvement and is now below the Minister’s Expectation target for development application determination time frames. The renewed push to prioritise and determine housing development applications is likely assisting in driving down turnaround times for Q1 24/25, as well as less overall applications freeing up some council resources. Ensuring this downward trend is continued and sustained over the coming quarters will be required to lock in this performance, particularly should the volume of applications pick up.

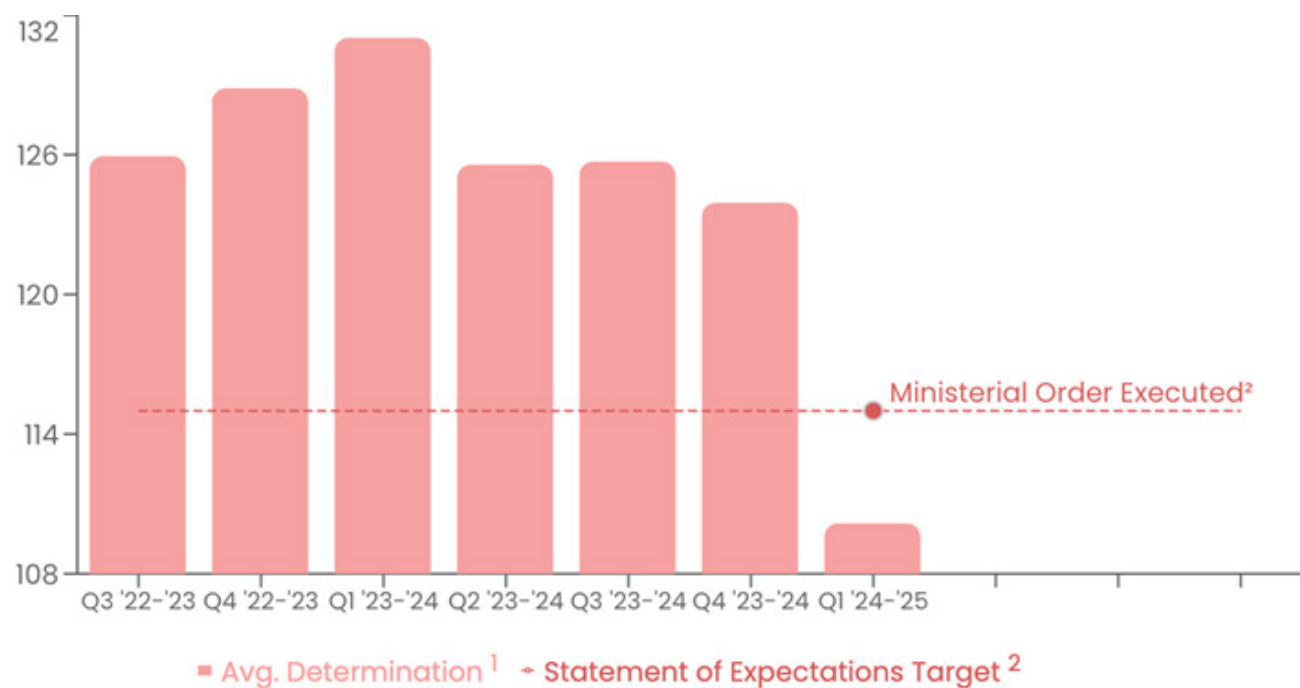


Chart 4 – Development Applications Submitted and Determined

¹The average determination time based on determined Development Applications across the Greater Sydney Megaregion per quarter submitted between Jan 2023 and the end of the current quarter.

² The minister’s target (115 days for Q1’ 24–25) is based on Development Applications assessment expectations as per the Environmental Planning and Assessment (Statement of Expectations) Order 2024.

TOD Precincts Aggregated Summary

The Transport Oriented Development (TOD) Program is one of the NSW Government's flagship planning reforms aimed at increasing housing density near metro and rail stations. Through this reform, the NSW Department of Planning, Housing and Infrastructure aims to enable more people to live close to transport, jobs, services, night life and amenities.

To achieve this outcome, new planning controls have been legislated to help stimulate development feasibility and support for the property industry to invest in these areas for higher density housing projects. In this section we aim to track how this policy is performing and, while relatively new in implementation, early market trends provide a window into policy outcomes.

While it is acknowledged that it will take time for TOD projects to come online, early indicators show that in the immediate future, developments in most of these precincts will be mostly low rise housing projects. This is reflected in the lack of diversity for State Significant project applications, applications for mixed use developments and applications for residential apartments across the precincts. Rather than seeing these types of applications come forward, most applications remain for single detached housing, complying developments and low impact developments.

State Significant Projects in TOD Precincts

State Significant projects are a pathway to development approval through State government rather than local council. It is reserved for high value projects deemed to be of state significance. The location of State Significant projects within TOD precincts provides a view on significant investments that are being made in these precincts.

To date, most State Significant projects in TOD precincts have been recorded in areas where previous planning reforms have occurred. This includes Gosford, under State Environmental Planning Policy Precincts – Regional 2021, i.e. are likely not attributable to the Transport Oriented Development or Low Rise Policies

The lack of State Significant projects may be an indication that housing projects remain in pre-planning phases, or that the precinct's respective planning controls are not supportive of commercially feasible TOD developments in the current market.

Notably, the lack of detailed data collected and publicly released on State Significant projects, including submission and determination dates and number of new dwellings proposed, makes it difficult to effectively measure the efficacy of TOD precinct planning controls and overall dwellings in the planned pipeline.

Case ID	Title	Stage	Type	Development Type	TOD Precinct
SSD-9499	Alteration and Additions to Ravenswood School for Girls	Withdrawn	State Significant Development	Educational establishments	Gordon
DA10132	56 Beane St, Gosford - Res Flat Building	Determination	Part4	Residential & Commercial	Gosford
SSD-10414	Mixed use development at 8-16 Watt Street, Gosford (Gateway site)	Response to Submissions	State Significant Development	Residential & Commercial	Gosford
SSD-47360461	Central Coast Quarter - Stage 2 (Southern Tower)	Prepare EIS	State Significant Development	Residential & Commercial	Gosford
SSD-47360465	Central Coast Quarter - Stage 3 (Eastern Tower)	Withdrawn	State Significant Development	Residential & Commercial	Gosford
SSD-47749715	University of Newcastle, Gosford Campus	Determination	State Significant Development	Educational establishments	Gosford
SSD-7603	Lidcombe Catholic Club Redevelopment	Withdrawn	State Significant Development	Accommodation	Lidcombe
MP08_0244	Lindfield Mixed Use (Lindfield Avenue)	Determination	Part3A	Residential & Commercial	Lindfield
DA457-10-2003	30 Honeysuckle Drive	Determination	Part4	Residential & Commercial	Newcastle Interchange
DA8062	Dyke Point Shed	Determination	Part4	Residential & Commercial	Newcastle Interchange
SSD-8019	21 Honeysuckle Drive Mixed Use Development	Determination	State Significant Development	Residential & Commercial	Newcastle Interchange

Table 2 – State Significant Projects in TOD Precincts

Shows the State Significant Projects which are located within a gazetted TOD Precinct.

New Dwellings Determined in TOD Precincts

Local development applications with new dwellings are comparably low across all quarters, except Q2 23/24 financial year, which was prior to the TOD reforms. This is a further indicator that housing projects largely remain in pre-planning phases or that the precincts planning controls are not supportive of commercially feasible TOD developments in the current market.

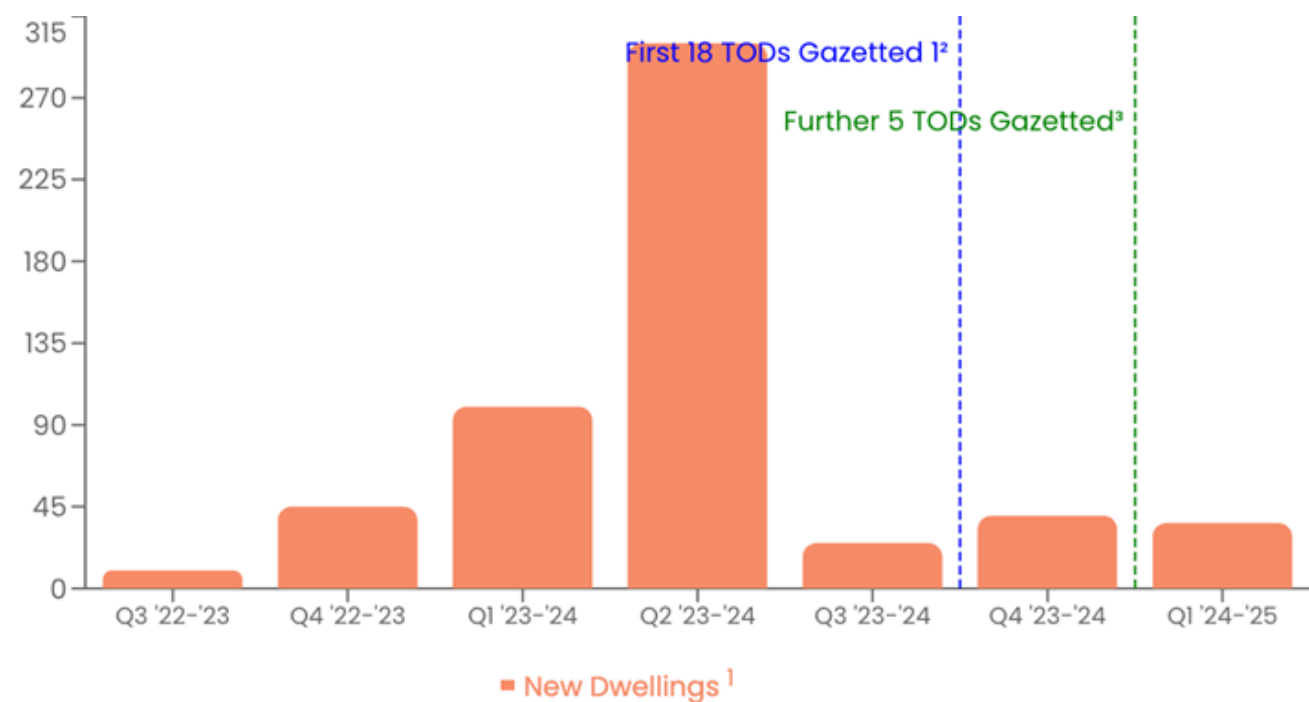


Chart 5 – New Dwellings Determined

¹The number of new dwellings based on determined Development Applications and Complying Development Certificate applications across all TOD Precincts per quarter submitted between Jan 2023 and the end of the current quarter.

² First 18 TODs Gazetted – April 2024

³ Further 5 TODs Gazetted – July 2024

Development Applications Submitted and Determined in TOD Precincts

Reviewing data on the submission and determination of local residential development applications in TOD areas, indicates that there has been no significant impact compared to pre-TOD reform periods. The backlog of unresolved applications from Q2 23/24 appears to have driven an increase in applications determined in Q1 24/25.

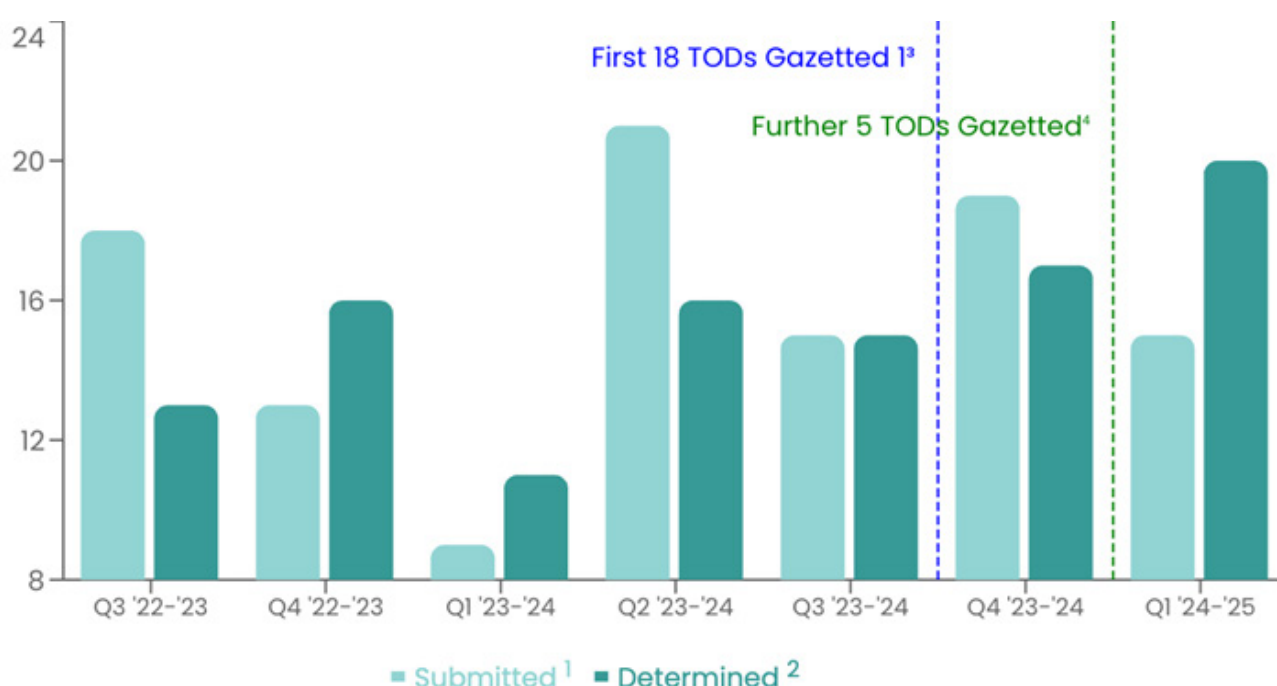


Chart 6 – Development Applications Submitted and Determined

¹ The number of Development Applications across all TOD Precincts submitted per quarter between Jan 2023 and the end of the current quarter.

² The number of Development Applications across all TOD Precincts determined per quarter between Jan 2023 and the end of the current quarter.

³ First 18 TODs Gazetted – April 2024

⁴ Further 5 TODs Gazetted – July 2024

Development Applications Average Determination Time in TOD Precincts

Timeframes taken to determine local development applications in TOD areas remain significantly above both statutory timeframes and the Minister’s Expectations. However, a recent downward trend can be observed from a high of almost 200 days to determine applications in Q4 22/23 to around 125 days in Q1 24/25.

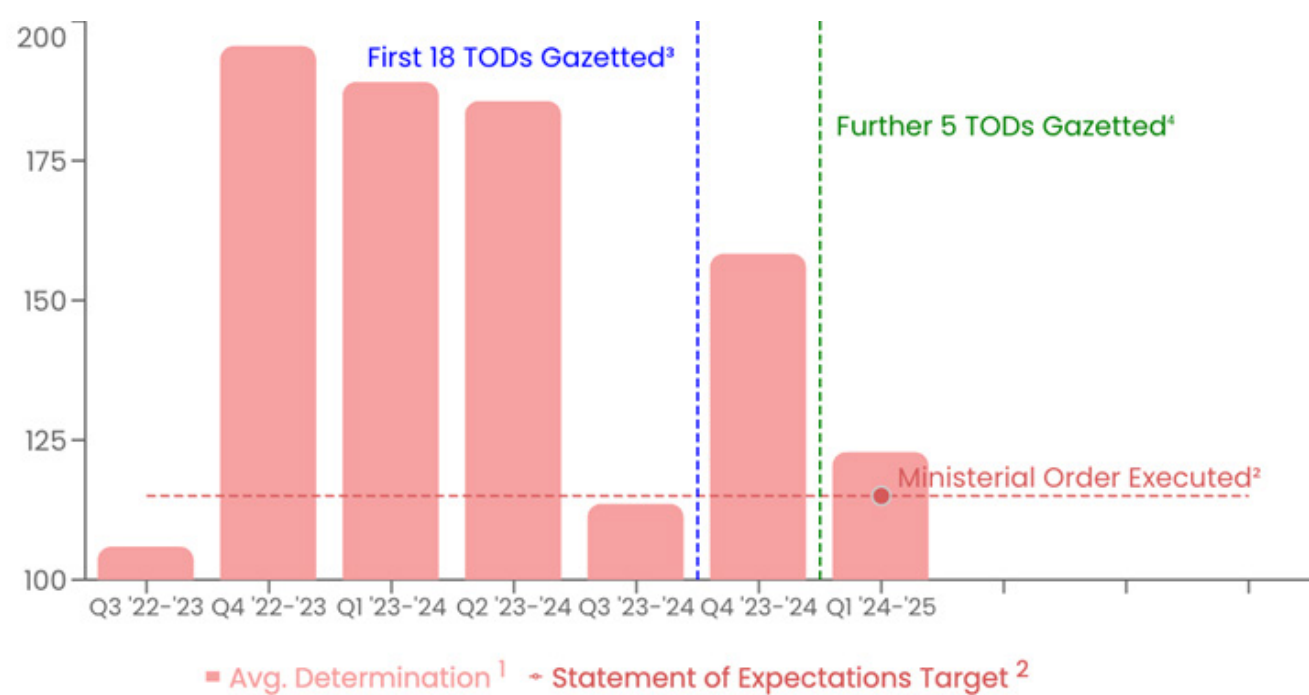


Chart 7 - Development Applications Submitted and Determined

¹The average determination time based on determined Development Applications across all TOD Precincts per quarter submitted between Jan 2023 (Q3 '22-'23) and Dec 2027 (Q2 '27-'28).

² The minister’s target (115 days for Q1' 24-25) is based on Development Applications assessment expectations as per the Environmental Planning and Assessment (Statement of Expectations) Order 2024.

³ First 18 TODs Gazetted – April 2024

⁴ Further 5 TODs Gazetted – July 2024

Local Development Applications in TOD Precincts

The tables below outline the trend of local development applications in each of the TOD Precincts. It shows that most recent development applications in TOD precincts have been for single detached housing and low impact developments, rather than the desired higher density development activity. While some precincts show residential apartment based applications are coming through, they remain in the significant minority of applications.

TOD Precinct Applications Assessment

Most submitted applications to date in gazetted TOD locations are for detached residential houses.

This is likely to be applications associated with an existing dwelling, such as for alterations and additions. Adamstown, Corrimal and Linfield are the only TOD precincts with recent applications for attached residential types such as dual occupancies, multi-dwelling houses (terraces) and the like. Applications for medium density housing and residential apartments (flat buildings) have only been recorded in Adamstown, Booragul, Gosford, Lindfield, Roseville and Wyong since the TOD reforms. Gordon, Lidcombe, Newcastle Interchange, Rockdale and Roseville have all recorded at least one mixed use development.

Determinations made in TOD precincts follow that of the types of developments being applied for. In this case, most determinations remain associated with a detached dwelling and alterations and additions to existing residential dwelling, as well as Complying Developments (minor works).

There have been very few applications associated with new dwellings. Newcastle's urban renewal program undertaken over the past few years prior to the TOD reforms can be called a success, with most new dwelling applications also being part of mixed-use developments, blending in retail and other economic uses.

Submitted Applications (To date)



Chart 8 – Submitted Applications (To date)

Shows the number of Development Applications lodged between Jan 2023 and the end of the current quarter per development type group per TOD precinct.

Determined Applications (To date)



Chart 9 - Determined Applications (To date)

Shows the number of Development Applications and Complying Development Certification applications determined between Jan 2023 and the end of the current quarter per development type group per TOD precinct.

New Dwellings (To date)



Chart 10 - New Dwellings (To date)

Shows the number of new dwellings based on determined Development Applications and Complying Development Certification applications between Jan 2023 and the end of the current quarter per development type group per TOD precinct.

New Dwellings Determined by TOD Precinct

Applications for new dwellings in TOD precincts since the activation of TOD planning reforms in April 2024 and July 2024 have been low – both in terms of total applications processed and dwelling density and height. The table below shows the number of applications determined since the activation of TOD policy and the count of new dwellings determined, the total number of new dwellings per development application and the height of dwellings (stories). This provides further evidence that density is not being achieved in most of these precincts, contrary to the intent of the TOD policy, with no TOD precinct averaging more than 2 stories in their determined DAs to date.

TOD Precinct	Start Date ¹	CDCs Determined ²	DAs Determined ³	New Dwellings Determined ⁴	Avg. Determined Dwelling Size ⁵	Avg. No. of Stories ⁶
Adamstown	April 2024	0	10	16	1.6	2
Banksia	July 2024	1	2	3	1.5	2
Booragul	April 2024	10	7	7	1	1
Cardiff	April 2024	1	0	0	0	0
Corrimal	April 2024	0	1	0	0	0
Dapto	July 2024	0	0	0	0	0
Gordon	April 2024	0	2	1	0.5	2
Gosford	July 2024	0	0	0	0	0
Hamilton	April 2024	1	2	2	1	2
Killara	April 2024	0	0	0	0	0
Kogarah	April 2024	1	1	2	2	0
Kotara	April 2024	0	0	0	0	0
Lidcombe	April 2024	0	1	0	0	0
Lindfield	April 2024	1	2	8	4	0

TOD Precinct	Start Date ¹	CDCs Determined ²	DAs Determined ³	New Dwellings Determined ⁴	Avg. Determined Dwelling Size ⁵	Avg. No. of Stories ⁶
Morisset	April 2024	1	0	0	0	0
Newcastle Interchange	April 2024	0	0	0	0	0
Rockdale	July 2024	0	1	0	0	0
Roseville	April 2024	0	4	18	4.5	2
Teralba	April 2024	0	1	1	1	1
Tuggerah	July 2024	1	1	1	1	1
Turrella	April 2024	3	2	0	0	0
Woy Woy	April 2024	0	0	0	0	0
Wyong	April 2024	0	1	3	3	0

Table 3 – New Dwellings Determined in TOD Precincts

¹ Start date of the TOD accord for the given precinct.

² The total number of Complying Development Certificate applications determined to date between the given start date and the end of the current quarter.

³ The total number of Development Applications determined to date between the given start date and the end of the current quarter.

⁴ The number of new dwellings based on Development Applications determined to date between the given start date and the end of the current quarter.

⁵ The proportion of new dwellings determined versus the total number of Development Applications determined to date between the given start date and the end of the current quarter.

⁶ The average number of new stories across Development Applications determined to date between the given start date and the end of the current quarter.

Concluding Policy Positions

UDIA will deliver this report quarterly over the National Housing Accord period in NSW. The report will provide Important analysis and supplement the tools available from Government including the Department's League Tables of both state and local government performance.

This report is intended to show how the development market is responding to newly announced Government policies intended to increase new housing supply.

This quarter's data demonstrates that there are insufficient policy levers currently being pulled to unblock the development ready housing pipeline and UDIA makes the following recommendation to Government.

Adopt the key recommendations made in the Productivity and Equality Commission's Review of Housing Supply Challenges and Policy Options for

New South Wales, which provides a common-sense blueprint to unlock more housing supply more quickly in particular:

- Consistent with the Commissioners finding that mid-rise apartments projects are largely unfeasible in most parts of Sydney, further increase densities around the announced TOD sites, expand them to 800m and add more locations to the program.
- Adopt the Commissioner's call to prioritise upfront investments in housing enabling infrastructure.
- Invest in collecting and publicly reporting more data on progress against local housing targets including the tracking the progress of development applications to construction commencements including for State significant projects.



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