



UDIA NSW Housing Accord Progress Report

March 2025

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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.

It 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 to help:
- improve application determination times,
- increase transparency of the planning system
- ensure greater accountability of all stakeholders.

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

Acknowledgement of Country

UDIA NSW and Mecone Group Acknowledges the Traditional Owners of Country throughout Australia and their continuing connectors 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 be Aboriginal Land.

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Executive Summary

This UDIA NSW Housing Accord Progress Report, is the second report in a series of analysis tracking NSW's progress in meeting the National Housing Accord target, of 322,000 new homes across the Greater Sydney Mega Region.

UDIA's [first report](#) (released in October 2024) indicated that NSW had started slowly in meeting its Housing Accord targets, showing a 25,300 approvals shortfall. In this second report, as of March 2025, Greater Sydney is now tracking 30,000 approvals behind its target to date, which is 22% below where it should be at this point in time.

Our analysis indicates that the gap between housing needs identified under the Accord, and the supply that is progressing through the planning and building system, is likely to remain below target and continue to track downwards by the conclusion of the Accord period in June 2029.

This is despite recent planning reforms in NSW, including new Transport Oriented Development (TOD) precincts and the implementation of the Low to Mid-Rise Housing Policy in late February 2025. These have clearly yet to have material impact on the ground, with this report still showing minimal uptake.

While UDIA has been supportive of the principles underpinning recent planning reform, we remain concerned that the NSW Government is forecasting up to one third of its Housing Targets will be delivered by these policies. Given current economic conditions are making many apartment projects unfeasible to build, we are concerned these policies may not deliver a material uplift in housing supply over the five-year period of the National Housing Accord and that more policy interventions are needed. This includes greater government investment in housing enabling infrastructure for greenfield development, which is more feasible but is facing significant barriers to delivery due to a lack of committed, funded, or completed infrastructure, or the need for additional post-DA planning approvals.

Without more diverse and targeted policy interventions, generations of Australians will continue to experience severe economic and social inequality that stem from a lack of access to housing.

Further Notes

This report has been developed in collaboration with planning consultancy Mecone Group.

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. To account for the Department of Planning, Housing and Infrastructure's advice regarding 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 (January 2023). This period is considered the average lead time for the delivery of new dwelling stock. Using the same

logic, our reporting assumes any DA approved in the last 18 months of the National Housing Accord period (i.e., post-January 2028) will not deliver a completed home within the Accord reporting period.

This report does not account for the attrition rate between approved DAs and completions. We acknowledge that many factors can stop DA approved projects from reaching completion. For simplicity UDIA and Mecone have not attempted to quantify that in this report, although we acknowledge that significantly more DA approvals will be needed to deliver completion targets with historic analysis indicating an attrition rate of up to 20%.

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 do not 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 LGA's 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.

Key Findings, as of 1 March 2025:

- Across the Sydney Mega Region, 139,178 dwelling approvals were needed to March 2025 to achieve the Accord target. Only 109,143 new dwellings have been determined. This represents 34% of the 5-year goal – a 22% shortfall on the cumulative target for this point in time.
- Many planned dwellings may not make it to construction with anecdotal evidence from our members noting that up to 20% of DAs do not reach construction and occupation stages (known as “DA attrition”).
- LGA's significantly progressing their pipeline include Blue Mountains, Hawkesbury, Mosman, Sutherland and Woollahra. Consistent between the better performing LGA's is that they all have relatively low individual targets.
- LGA's significantly behind in their pipeline include Ku-ring-gai, Burwood, Strathfield, North Sydney and Sydney City LGA's. Collectively these LGA's still require more than 30,000 dwellings to be approved to meet their housing Accord Targets.

Council Progress Towards Meeting Housing Target

Several major LGAs, including Ku-ring-gai (14%), Burwood (17%), Strathfield (19%), North Sydney (20%), and Sydney (20%), are tracking well below their targets. Parramatta (27%) and Canterbury-Bankstown (26%), two of the state's key housing markets, are also significantly behind, suggesting that the challenges in approvals and development feasibility are widespread.

Several LGAs are however tracking above 50% of their targets, including Ryde (52%), Cessnock (51%), and Port Stephens (51%). Blue Mountains is the only LGA that has already surpassed its target (103%), potentially indicating that its target (600 dwellings) was set too low.

Larger greenfield areas, including The Hills (30%), Blacktown (29%), Camden (34%), and Campbelltown (35%) are still below expected levels, while Penrith (45%) and Sutherland (61%) are faring better.

The slow progress in high-demand areas like Sydney, North Sydney, and Parramatta, where there is greater access to jobs and economic opportunities, may exacerbate housing shortages. LGAs with higher progress tend to be in outer or regional areas of Sydney and be areas with significant greenfield developments. This suggests there are policy or market barriers to urban infill development and that there is a growing need to support outer regional areas with infrastructure that connects to high-demand inner Sydney areas where jobs and services are located, or other economic policies are required to shift jobs and services to outer regional areas.

LGA Name	Dwelling Target (5 Year) ¹	Dwelling Target (To Date) ²	New Dwellings (To Date) ³	Progress towards Target ⁴
LGA's tracking below their Dwelling Target to Date				
Ku-ring-gai	7,600	3,276	1,080	14%
Burwood	3,300	1,430	581	17%
Strathfield	3,500	1,508	667	19%
North Sydney	5,900	2,548	1,211	20%
Sydney	18,900	8,190	3,965	20%
Bayside	10,100	4,368	2,114	20%
Hornsby	5,500	2,366	1,185	21%
Canterbury-Bankstown	14,500	6,266	3,853	26%
Georges River	6,300	2,730	1,730	27%
Parramatta	19,500	8,450	5,452	27%
Inner West	7,800	3,380	2,224	28%
Newcastle	11,100	4,810	3,115	28%
Blacktown	21,400	9,256	6,221	29%
The Hills	23,300	10,088	7,005	30%
Fairfield	5,900	2,548	1,788	30%
Liverpool	16,700	7,228	5,267	31%
Cumberland	12,200	5,278	4,260	34%
Camden	10,200	4,420	3,477	34%
Wollondilly	5,500	2,366	1,948	35%
Campbelltown	10,500	4,550	3,710	35%
Wollongong	9,200	3,978	3,494	37%
Lane Cove	3,400	1,456	1,306	38%

LGA Name	Dwelling Target (5 Year) ¹	Dwelling Target (To Date) ²	New Dwellings (To Date) ³	Progress towards Target ⁴
Kiama	900	390	346	38%
Willoughby	3,400	1,456	1,381	40%
Lake Macquarie	8,000	3,458	3,205	40%
Canada Bay	5,000	2,158	2,027	40%
Maitland	5,300	2,288	2,217	41%
LGA's tracking above their Dwelling Target to Date				
Shoalhaven	4,900	2,106	2,140	43%
Penrith	8,400	3,640	3,812	45%
Waverley	2,400	1,040	1,094	45%
Central Coast	9,400	4,056	4,441	47%
Randwick	4,000	1,716	1,934	48%
Northern Beaches	5,900	2,548	2,893	49%
Hunters Hill	400	156	199	49%
Shellharbour	3,800	1,638	1,905	50%
Cessnock	3,900	1,690	2,016	51%
Port Stephens	2,100	910	1,091	51%
Ryde	11,600	5,018	6,128	52%
Woollahra	1,900	806	1,072	56%
Sutherland	6,000	2,600	3,680	61%
Mosman	500	208	350	70%
Hawkesbury	1,300	546	941	72%
Blue Mountains	600	260	618	103%
Sydney Megaregion Total	322,000	139,178	109,143	34%

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 proportionated to the end of the current period.

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

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

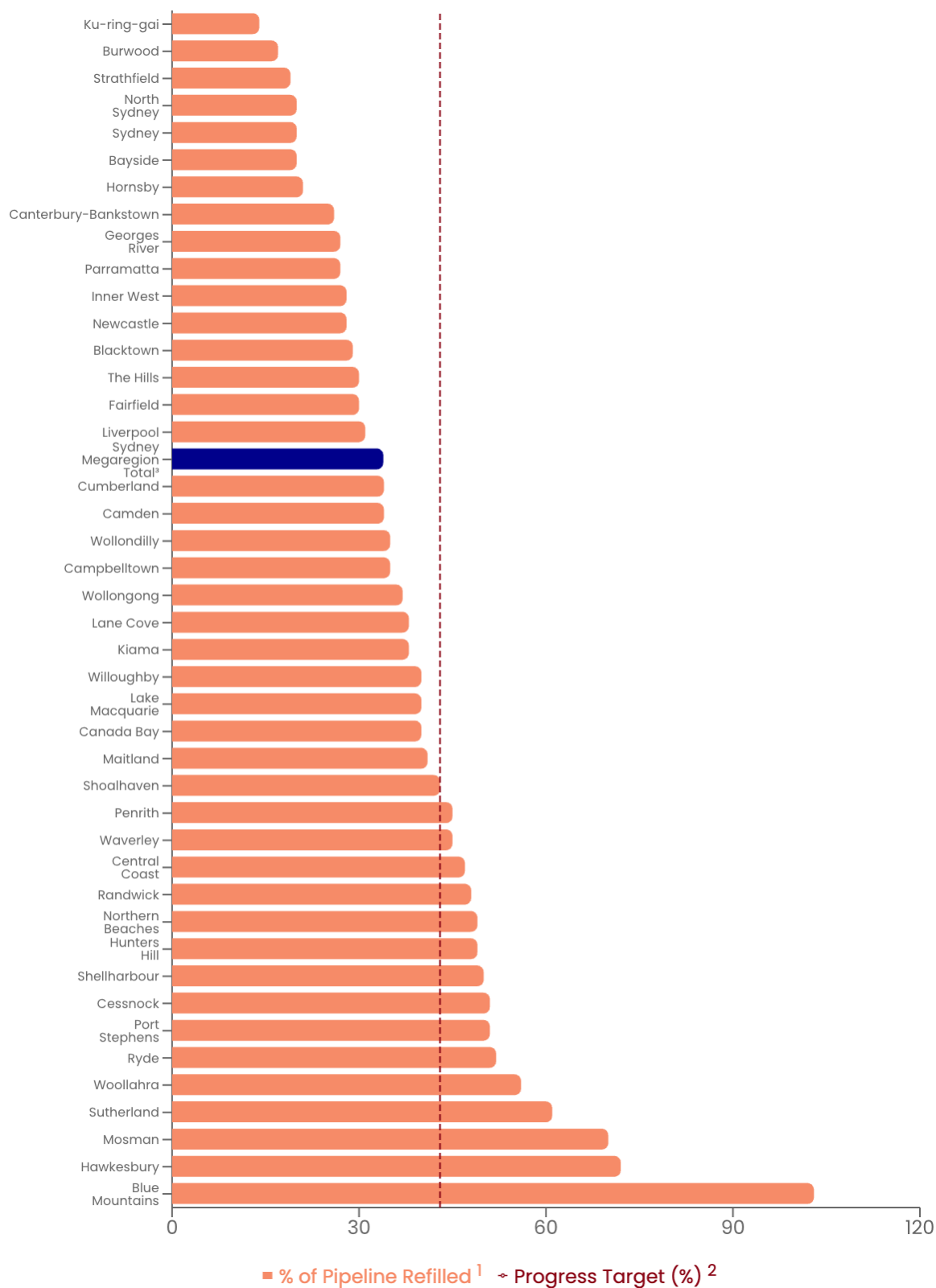


Chart 1 – LGA Progression Towards Meeting Housing Target

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 months progressed as a benchmark comparison.

Development Applications Submitted and Determined

Fewer residential DAs are in the pipeline, meaning potentially lower future housing supply, further jeopardising NSW's ability to meet the Housing Accord targets. Unfortunately, there has been a notable and declining trend in development applications being submitted (and subsequently determined) for residential development applications (refer to Chart 3). This data indicates a significant slowdown in housing DAs, which could further impact NSW's ability to meet housing accord targets. Key points to note:

- Residential DA submissions have dropped by approximately 21% from 2023 to the latest period in 2025.
- Residential DA determinations have decreased even more, by approximately 23% over the same period.

The volume of Development Applications (DAs) for residential projects peaked in October 2023, with 1,662 applications submitted that month. However, since then, submissions have steadily declined, reaching a low of 1,080 in February 2025. Similarly, DA determinations peaked between March and May 2023 (~1,700 approvals per month) but have since dropped to just 899 in January 2025.

This shrinking development pipeline poses a risk to meeting the NSW Housing Accord targets, particularly if new DAs fail to deliver higher dwelling yields. Across the Greater Sydney Mega Region, the total number of net new dwellings submitted via DAs has also declined, falling from 42,059 in 2022 to 37,975 in 2024—a decrease of approximately 4,000 dwellings (9.7%).

At the same time, some developers are shifting toward Complying Development Certificates (CDCs) as an alternative approval pathway. This pathway has seen a 16.4% increase in net new dwellings approved across Greater Sydney Mega Region, rising from 11,600 in 2022 to 13,510 in 2024 (+1,911 dwellings). However, the increase in CDC approvals is not large enough to offset the decline in new dwellings submitted via local development applications.

If this trend continues, the shortfall dwellings lodged for approvals could further constrain housing supply, making it more difficult for NSW to meet its long-term housing targets.

Further analysis indicates that this trend is not isolated to the residential sector. For all development applications lodged (e.g. industrial, commercial, residential etc) in NSW for the years 2022, 2023, and 2024, has also been declining:

- **2022:** 72,917 applications in total,
- **2023:** 60,103 applications in total,
- **2024:** 54,771 applications in total*.

This a 25% drop in overall DAs across NSW between 2022 and 2025.

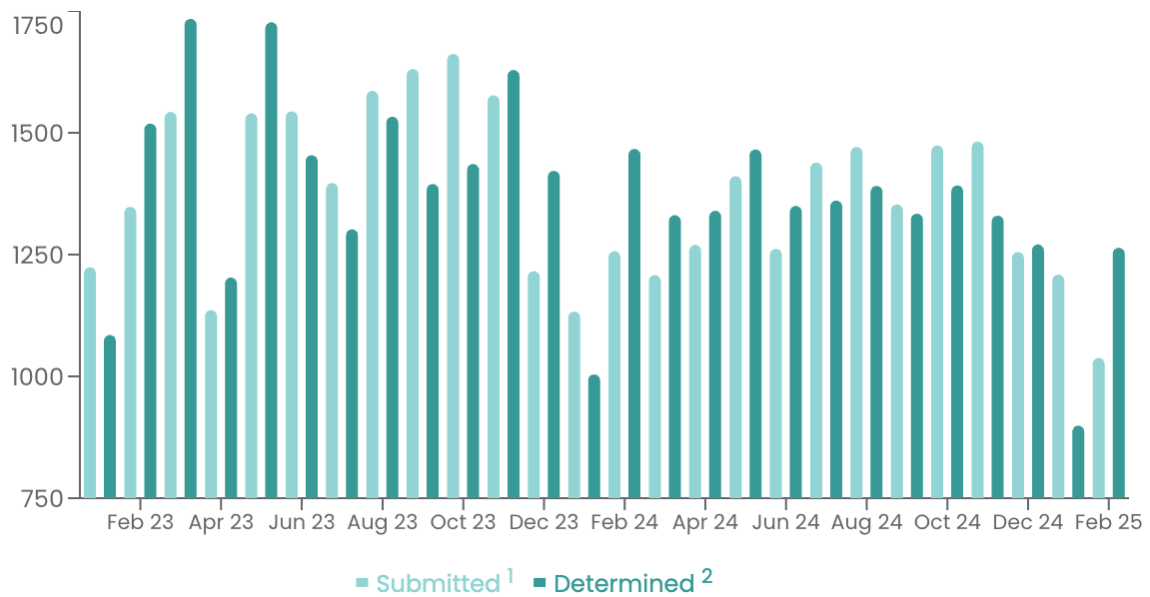


Chart 3 – Development Applications Submitted and Determined

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

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

*DA yearly analysis source: Mecone MOSAIC AI

Development Applications Average Determination Time

Pleasingly, UDIA has observed DA processing times for residential based developments exceeding the Minister's expectations. This result is likely a combination of the Ministerial order, a smaller volume of DAs entering the system, and improvements to assessing processes by Planning Authorities. However, it remains to be seen if these timeframes will hold if there is the required increase in the volume of DA's needed to meet the Accord target.

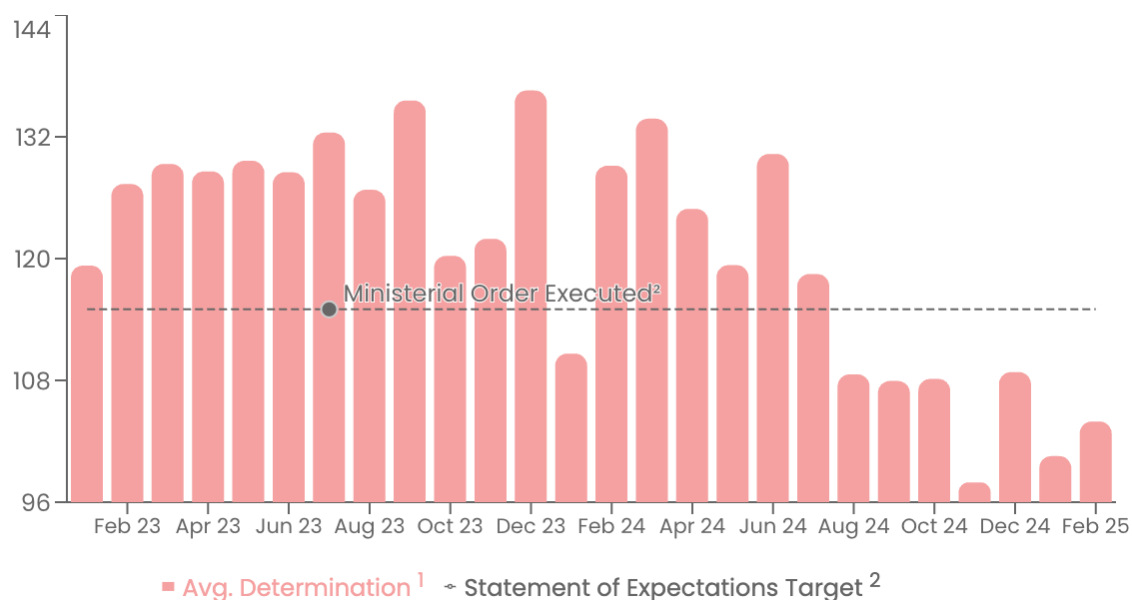


Chart 4 – Development Applications Submitted and Determined

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

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, designed to increase housing density near metro and rail stations. By prioritising housing in well-connected locations, the NSW Department of Planning, Housing and Infrastructure aims to enable more people to live close to transport, jobs, services, nightlife, and amenities.

Alongside zoning changes, the government has streamlined planning pathways by removing some regulatory barriers, such as requirements for design competitions in TOD precincts. This aims to accelerate project approvals while maintaining design excellence.

Early trends are indicating that developers are slow to utilise the new TOD planning reforms, with very few DAs lodged in these precincts to date. This is a concern given that the first precincts were gazetted 10 months ago. Despite broad policy support from industry, the majority of new development applications in these areas remain for low-rise housing projects, rather than the mid-to-high-rise apartments expected through the policy.

State Significant Projects in TOD Precincts

Some Transport Oriented Development (TOD) precincts have been experiencing recent activity with new State Significant Development Applications being prepared for developments with a residential component. New applications are emerging in Lindfield and Roseville with directions from the Department of Planning, Housing and Infrastructure to the proponent to prepare Environmental Impact Statements (EIS) (x 6 applications) and for preparing and issuing of Secretary Environmental Assessment Requirements (x 2 applications) to developers.

However, to date, most state significant development applications remain either outside of the TOD precincts or were already underway prior to the TOD planning reforms. Those that can be attributed to recent reforms (e.g., Roseville and Lindfield, Gordon and Dapto) make up only a small proportion of applications, and in themselves are unlikely to significantly shift progress towards the Housing Accord targets.

Case ID	Title	Stage	Type	Development Type	TOD Precinct
SSD-68374982	91A Byamee St Dapto residential use (affordable)	Prepare EIS	State Significant Development	In-fill Affordable Housing	Dapto
SSD-78775458	RFB with affordable housing - Park Ave, Gordon	Prepare EIS	State Significant Development	Residential	Gordon
DAI0132	56 Beane St, Gosford - Res Flat Building	Determination	Part4	Residential & Commercial	Gosford
DA81-4-2004	70 Mann St Gosford Mixed Development	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-47360465	Central Coast Quarter - Stage 3 (Eastern Tower)	Withdrawn	State Significant Development	Residential & Commercial	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
SSD-78156462	Residential Flat Building at Bent St, Lindfield	SEARs	State Significant Development	In-fill Affordable Housing	Lindfield
SSD-78669234	27-29 Tryon Road, Lindfield	Prepare EIS	State Significant Development	In-fill Affordable Housing	Lindfield
SSD-79276958	59-63 Trafalgar Avenue 1A&1B Valley Road Lindfield	Prepare EIS	State Significant Development	In-fill Affordable Housing	Lindfield

Case ID	Title	Stage	Type	Development Type	TOD Precinct
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
SSD-77825469	In-fill affordable housing, Pockley Avenue, Roseville	Prepare EIS	State Significant Development	In-fill Affordable Housing	Roseville
SSD-77829461	In-fill affordable housing, Larkin Street & Pockley Avenue, Roseville	Prepare EIS	State Significant Development	In-fill Affordable Housing	Roseville
SSD-78996460	16-24 Lord Street & 21-27 Roseville Avenue	SEARs	State Significant Development	In-fill Affordable Housing	Roseville

Table 2 – State Significant Projects in TOD Precincts

Shows the residential based State Significant Projects which are located within a relevant TOD Precinct.

New Dwellings Determined in TOD Precincts

Overall, new dwellings in TOD precincts remain low, with no significant changes since the commencement of the TOD program in April 2024 (the vertical blue line in Chart 5). As noted previously, since new TOD areas have been activated the residential development typology remains largely low scale, low density, detached housing. As is revealed later in this report, no TOD precinct is averaging more than two storeys in its determined DAs during the reporting period.

This may indicate that some TOD areas are still not attractive enough for market investments in high-cost residential typologies; or new developments that will take time to plan and deliver will extend beyond the Accord making little contributions to achieving the 5-year target.

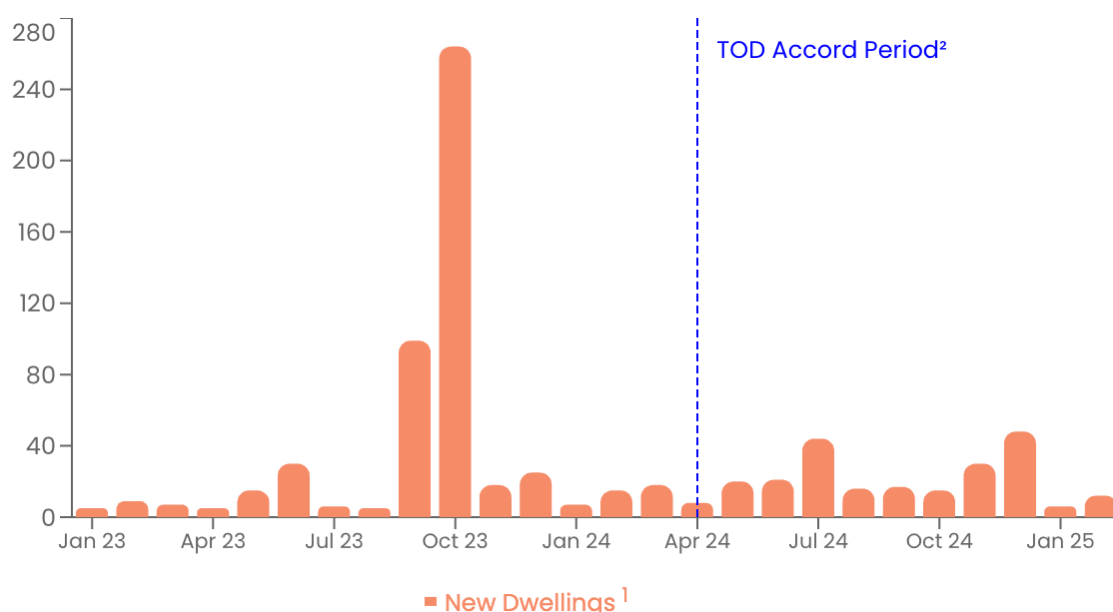


Chart 5 – New Dwellings Determined, TOD Precincts

Note: The spike observed in October 2023 can be attributed to two DAs at 711 Hunter Street, Newcastle for a combined 258 new dwellings.

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

² Beginning of TOD Accord Period – April 2024. Note that not all precincts were gazetted at the same time. Precinct gazettal periods: April 2024, July 2024, October 2024, January 2025.

Development Applications Submitted and Determined in TOD Precincts

The number of development applications submitted and determined in TOD precincts has remained largely stable, with no observable increases even after the initial phase of TOD precincts coming on-line. This indicates that the policy is yet to have a positive impact on boosting housing supply.

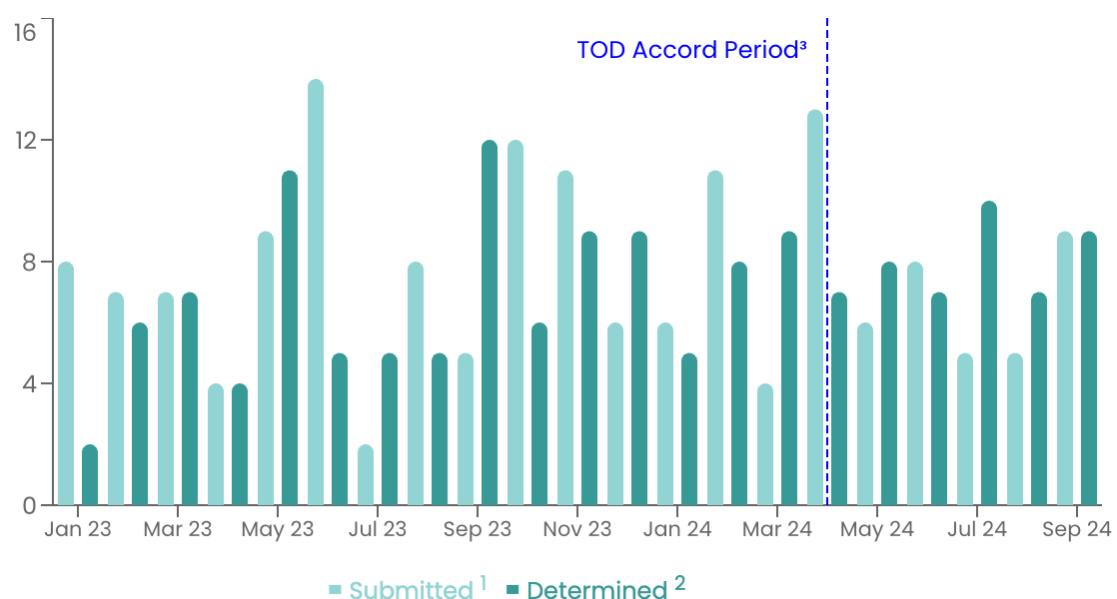


Chart 6 – Development Applications Submitted and Determined, TOD Precincts

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

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

³ Beginning of TOD Accord Period – April 2024. Note not all precincts gazetted at the same time. Precinct gazettal periods: April 2024, July 2024, October 2024, January 2025.

Development Applications Average Determination Time in TOD Precincts

The timeframes to assess development applications in TOD areas remain below Minister's expectations except for anomalies in June 2024, July 2025 and February 2025.

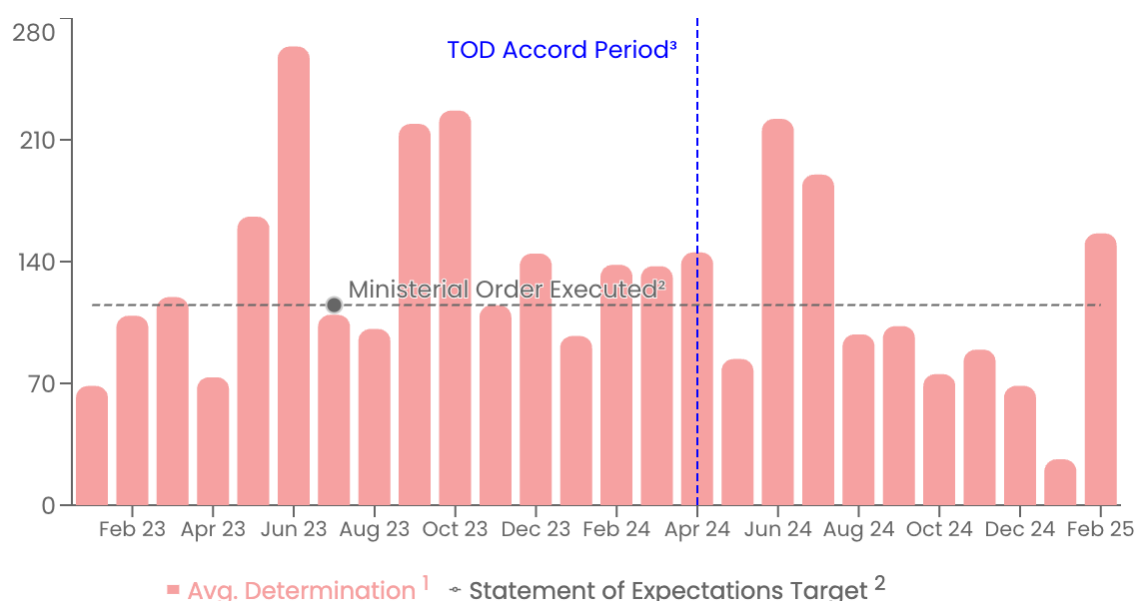


Chart 7 – Development Applications Submitted and Determined, TOD Precincts

¹ The average determination time based on determined Development Applications across all TOD Precincts per month submitted between Jan 2023 and Dec 2027.

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 Beginning of TOD Accord Period – April 2024. Note not all precincts gazetted at the same time. Precinct gazettal periods: April 2024, July 2024, October 2024, January 2025.

Local Development Applications in TOD Precincts

The charts below outline the trend of local development applications in TOD Precincts month to month and a count since July 2024. As the number of TOD precincts have expanded since the last report in October, a greater variety of residential types are being recorded in more diverse urban settings. However, the main residential typology target for TOD precincts (residential apartments) has yet to manifest in most of the TOD precincts.

Submitted Applications (To date)

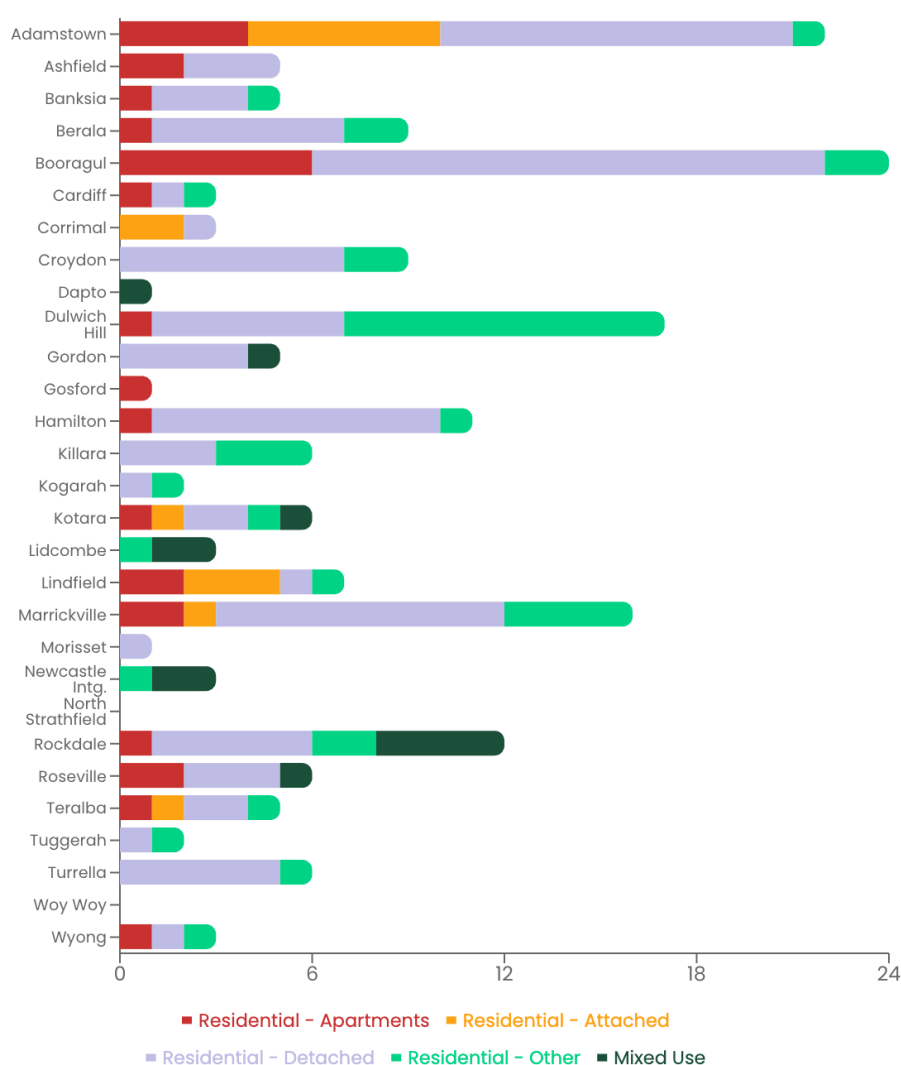


Chart 8 - Submitted Applications (To date), TOD Precincts

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

Determined Applications (To date)

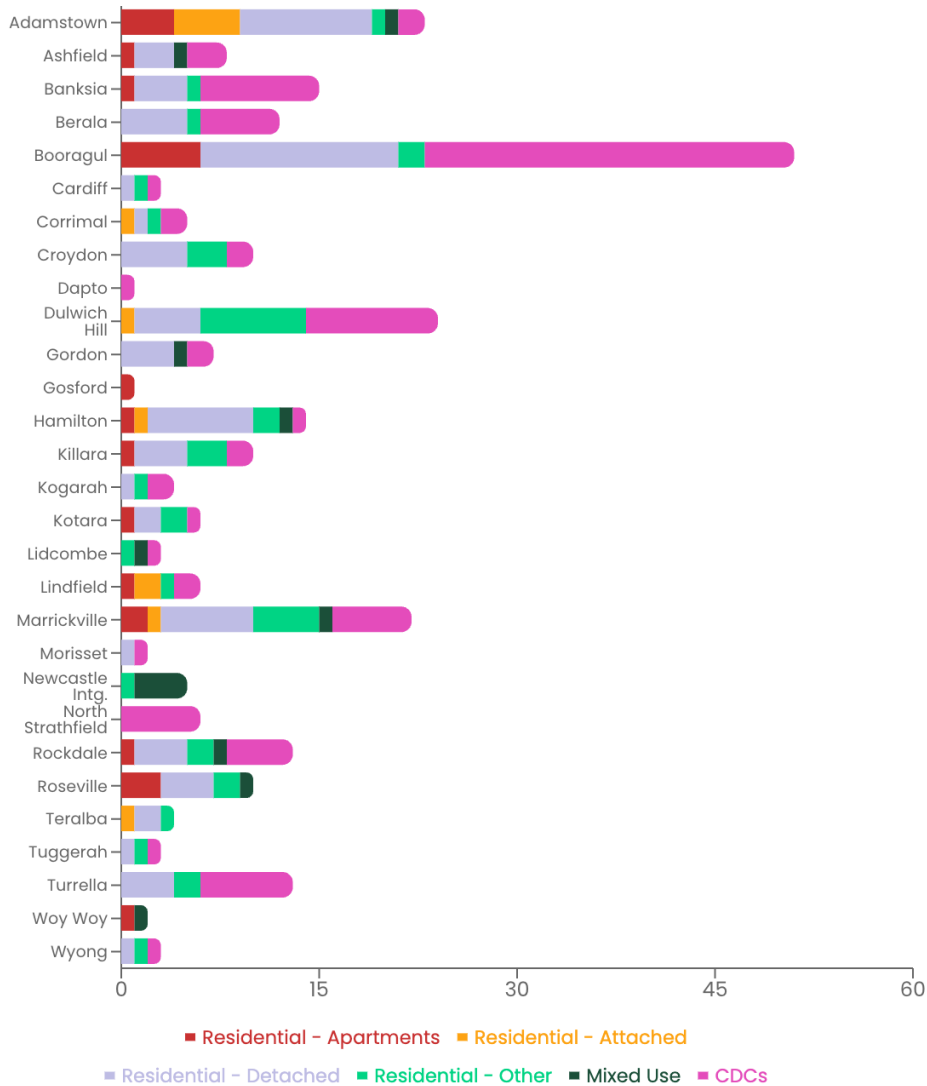


Chart 9 – Determined Applications (To date), TOD Precincts

Shows the number of residential development applications determined by type and the number of residential Complying Development Certification applications determined between Jan 2023 and the end of the current period per TOD precinct.

New Dwellings (To date)

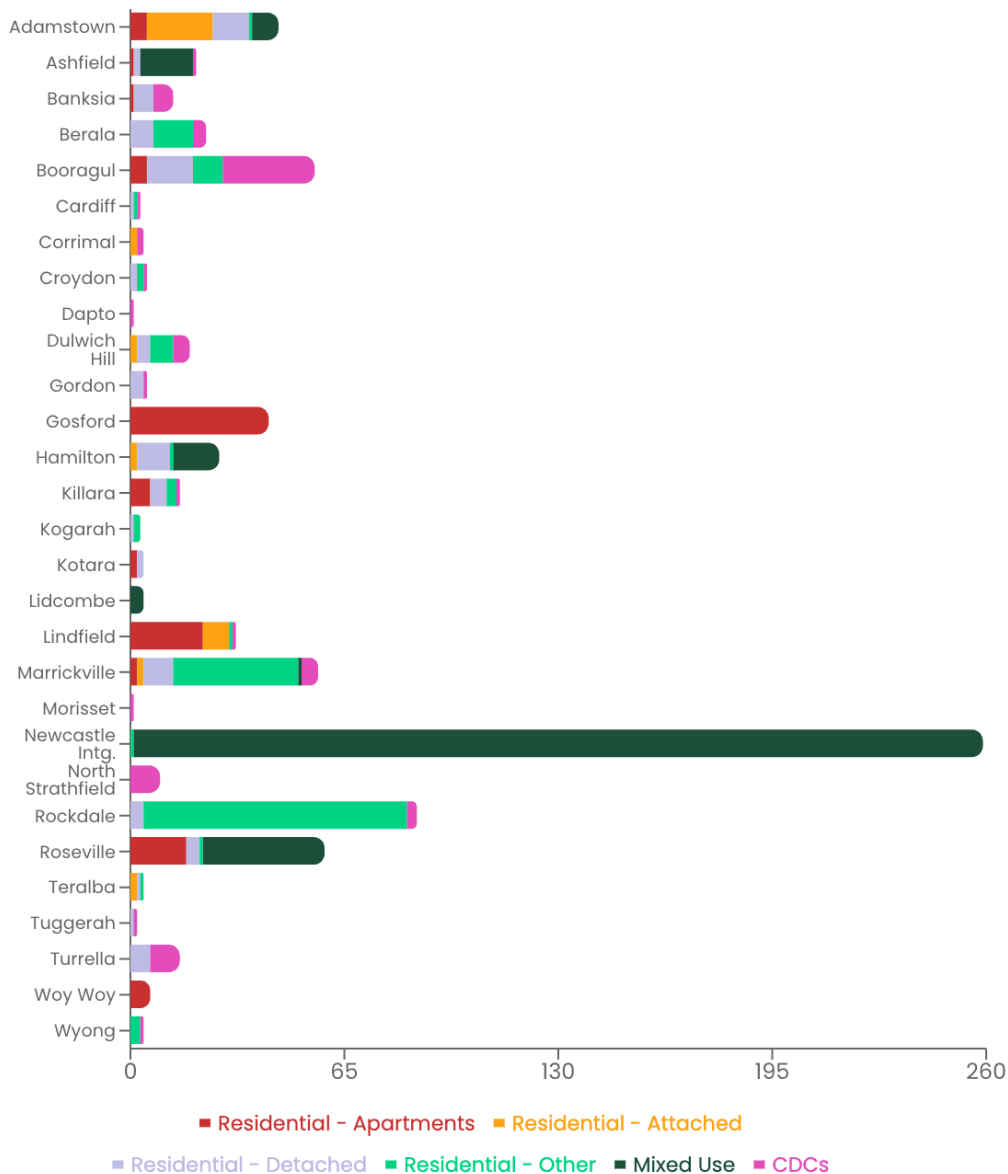


Chart 10 – New Dwellings (To date), TOD Precincts

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 period per development type group per TOD precinct.

New Dwellings Determined in TOD Precincts

Out of the 28 TOD precincts that are currently active, Roseville and Berala appear to be attracting more development activity compared to other TOD precincts. Areas such as Gosford and Newcastle had pre-TOD policy controls in place that drove development activity. However, to date less than 150 new dwellings have cumulatively been approved in TOD areas via local developments and complying development. Additionally, no individual TOD precinct has averaged more than a 2-storey height in their determined DAs which is a clear indication that the TOD height and floor space controls are not being utilised.

TOD Precinct	Start Date ¹	CDCs Determined ²	DAs Determined ³	New Dwellings Determined ⁴	Avg. Determined Dwellings per application ⁵	Avg. No. of Storeys ⁶
Adamstown	April 2024	0	12	19	1.58	2
Ashfield	January 2025	0	0	0	0	0
Banksia	July 2024	3	3	4	1.33	2
Belmore	December 2024	0	0	0	0	0
Berala	October 2024	1	2	14	7	0
Booragul	April 2024	19	14	21	1.5	1
Cardiff	April 2024	1	0	0	0	0
Corrimal	April 2024	1	1	0	0	0
Dapto	July 2024	0	0	0	0	0
Gordon	April 2024	0	3	2	0.67	2
Gosford	July 2024	0	1	42	42	0
Hamilton	April 2024	1	5	5	1	2
Killara	April 2024	1	1	1	1	0
Kogarah	April 2024	1	1	2	2	0
Kotara	April 2024	0	1	2	2	2

TOD Precinct	Start Date ¹	CDCs Determined ²	DAs Determined ³	New Dwellings Determined ⁴	Avg. Determined Dwellings per application ⁵	Avg. No. of Storeys ⁶
Lidcombe	April 2024	0	1	0	0	0
Lindfield	April 2024	1	2	8	4	0
Marrickville	January 2025	0	0	0	0	0
Morriset	April 2024	1	0	0	0	0
Newcastle Interchange	April 2024	0	1	0	0	0
North Strathfield	November 2024	0	0	0	0	0
Rockdale	July 2024	3	4	2	0.5	2
Roseville	April 2024	0	5	19	3.8	2
Teralba	April 2024	0	2	3	1.5	2
Tuggerah	July 2024	1	1	1	1	1
Turrella	April 2024	4	3	1	0.33	2
Woy Woy	April 2024	0	0	0	0	0
Wyong	April 2024	0	2	3	1.5	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 period.

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

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

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 period.

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

Low Rise Reforms

The NSW Government also introduced the Low and Mid-Rise Housing Policy to support increasing the housing pipeline and promoting diverse housing options in well-connected areas. A key component of these reforms is the dual occupancy policy (i.e., the Low-Rise portion of the reforms), which has the objective to facilitate increased housing density across the state.

Effective from 1 July 2024, this state policy direction enabled dual occupancies and semi-detached homes to be permitted in all R2 Low-Density Residential Zones statewide, with exclusions for areas affected by defined environmental constraints (such as bushfire prone land being exempted). This change allows property owners with suitable land to potentially replace a single dwelling with two, effectively doubling housing capacity in these areas.

Our analysis reveals:

- Of the 42 LGAs across the Greater Sydney Mega Region, the new dual occupancy permissibility rules benefitted exactly half (21 LGAs). The remaining 21 LGAs already had permitted dual occupancies and semi-detached development typologies in R2 Zones as part of their Local Environment Plans.
- Maitland LGA is not affected at all as it contains no R2 zones.
- Of the 21 LGAs that were affected by the reforms, 18 LGAs partially benefitted – i.e., they already permitted some dual occupancy types in the LEPs prior to the reforms, but not all types. Additionally, Northern Beaches LGA already permitted dual occupancy types in some parts of the R2 zone, but not other parts.
- Only 3 LGAs were significantly benefitted by the policy, where previously their LEPs entirely prohibited all types of dual occupancy and semi-detached developments in their R2 zones. These LGAs were:
 - Hawkesbury
 - Hornsby, and
 - Ku-Ring-Gai.
- Since the reforms, there has been a total of 88 development applications or complying development certificates lodged for dual occupancy or semi-detached housing types in R2 zone areas of Greater Sydney Mega Region, where they would have previously been prohibited.
- Collectively they have contributed a minimum of ~176 new dwellings to the supply pipeline, with 60% of these in the Liverpool and Northern Beaches LGAs.

LGA Name	Dual Occupancy (Attached) ¹		Dual Occupancy (Detached) ²		Semi Detached ³	
	Permissible in LEP ⁴	Number of Lodgements ⁵	Permissible in LEP ⁴	Number of Lodgements ⁵	Permissible in LEP ⁴	Number of Lodgements ⁵
Bayside	Yes	N/A	Yes	N/A	Yes	N/A
Blacktown	Yes	N/A	Yes	N/A	No	5
Blue Mountains	Yes	N/A	Yes	N/A	No	0
Burwood	Yes	N/A	Yes	N/A	Yes	N/A
Camden	Yes	N/A	Yes	N/A	No	1
Campbelltown	Yes	N/A	Yes	N/A	Yes	N/A
Canada Bay	Yes	N/A	Yes	N/A	Yes	N/A
Canterbury-Bankstown	Yes	N/A	Yes	N/A	Yes	N/A
Central Coast	Yes	N/A	Yes	N/A	Yes	N/A
Cessnock	Yes	N/A	Yes	N/A	Yes	N/A
Cumberland	Yes	N/A	Yes	N/A	Yes	N/A
Fairfield	Yes	N/A	Yes	N/A	Yes	N/A
Georges River	Yes	N/A	Yes	N/A	Yes	N/A
Hawkesbury	No	3	No	0	No	0
Hornsby	No	0	No	0	No	1
Hunters Hill	Yes	N/A	Yes	N/A	No	1
Inner West	No	5	No	2	Yes	N/A
Kiama	Yes	N/A	Yes	N/A	Yes	N/A
Ku-ring-gai	No	2	No	2	No	0
Lake Macquarie	Yes	N/A	Yes	N/A	Yes	N/A

LGA Name	Dual Occupancy (Attached) ¹		Dual Occupancy (Detached) ²		Semi Detached ³	
	Permissible in LEP ⁴	Number of Lodgements ⁵	Permissible in LEP ⁴	Number of Lodgements ⁵	Permissible in LEP ⁴	Number of Lodgements ⁵
Lane Cove	Yes	N/A	Yes	N/A	No	0
Liverpool	No	6	No	15	Yes	N/A
Mosman	No	0	No	0	Yes	N/A
Newcastle	Yes	N/A	Yes	N/A	Yes	N/A
Northern Beaches	Yes, except Warringah LEP	21	Yes, except Warringah LEP	7	No, except Manly LEP	4
North Sydney	Yes	N/A	No	0	Yes	N/A
Parramatta	Yes	N/A	Yes	N/A	No	1
Penrith	Yes	N/A	Yes	N/A	No	1
Port Stephens	Yes	N/A	Yes	N/A	Yes	N/A
Randwick	Yes	N/A	No	2	Yes	N/A
Ryde	Yes	N/A	No	0	No	2
Shellharbour	Yes	N/A	Yes	N/A	Yes	N/A
Shoalhaven	Yes	N/A	Yes	N/A	Yes	N/A
Strathfield	No	2	No	0	Yes	N/A
Sutherland	Yes	N/A	Yes	N/A	Yes	N/A
Sydney	Yes	N/A	Yes	N/A	No	0
The Hills	Yes	N/A	Yes	N/A	No	0
Waverley	Yes	N/A	Yes	N/A	Yes	N/A
Willoughby	Yes	N/A	Yes	N/A	No	4
Wollondilly	Yes	N/A	Yes	N/A	Yes	N/A
Wollongong	Yes	N/A	Yes	N/A	Yes	N/A

LGA Name	Dual Occupancy (Attached) ¹		Dual Occupancy (Detached) ²		Semi Detached ³	
	Permissible in LEP ⁴	Number of Lodgements ⁵	Permissible in LEP ⁴	Number of Lodgements ⁵	Permissible in LEP ⁴	Number of Lodgements ⁵
Woollahra	Yes	N/A	Yes	N/A	Yes	N/A

Table 4 – Permissibility of Dual Occupancies in R2 Zones.

Note 1: where “Yes” and “N/A” appear, the LEP already permits dual occupancy or semi-detached development types.

¹ Whether Dual Occupancy (Attached) is permissible within an R2 zone for the given LGA as per the relevant LEP instrument.

² Whether Dual Occupancy (Detached) is permissible within an R2 zone for the given LGA as per the relevant LEP instrument.

³ Whether Semi-Detached is permissible within an R2 zone for the given LGA as per the relevant LEP instrument.

⁴ Indicates whether the respective development type in the given LGA is permissible within an R2 zone for the relevant LEP instrument.

⁵ Indicates the total number of Development Application (DA) and Complying Development Certificates (CDC) applications in the given LGA within R2 zones since July 2024 for the relevant development type.

Concluding Policy Positions

UDIA will continue to deliver progress reports over the National Housing Accord period in NSW. The reports will continue to provide a layer of accountability through the analysis, supplementing the tools provided by Government including the Department's League Tables on both state agency 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 to meet the Accord target. Our second report has clearly demonstrated there is little activity evident in the TOD or Low and Mid-Rise locations to date. This is despite the fact these reforms are expected to deliver 138,000 homes over 15 years and 112,000 homes over the next 5 years respectively.

UDIA is growing increasingly concerned about the ability of these reforms to effectively contribute to meeting the housing targets, especially during the National Housing Accord period. This uncertainty puts the state's capacity to deliver its share of the National Housing Accord at greater risk.

In response to the findings of this latest report **UDIA offers the following key policy recommendations:**

- **Greater Transparency on the National Housing Accord Projected Pipeline:** The State Government should provide greater transparency on the targets for the Low and Mid-Rise Housing Policy over the National Housing Accord period, on an LGA-by-LGA basis for the TOD, Low-Rise, and Mid-Rise housing policies. Industry and Local Government need to understand where new dual-occupancies and mid-rise apartments are anticipated to be located. UDIA consistently advocates for more open and transparent data, which will ultimately enable better decision making and policy development. We believe the certainty that would be offered by clarifying LGA targets under the Low and Mid Rise Policy and TOD Program will be crucial to industry and government having a shared understanding of how these new policies are performing in the next 12-24 months. This will enable an early and constructive dialogue around altered policy settings should it become apparent these policies are not being taken up at the rates, and in the locations, that Government has forecast.
- **Potential recalibration of the TOD Policy and feasibility review of the mid-rise reforms:** Government should work closely with industry, as we approach 12 months since the gazettal of the first TOD precincts, to re-assess the current controls applying in the 37 locations under the first stage of the TOD program. The Government should also review whether allowable full floor space ratios included in the Mid-Rise reforms can actually be realised on a-typical sites and if that level of density is feasible in current market conditions.

We are city-shapers.

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