UDIA National Housing Pipeline®

National Executive Summary Report

NHP 2025

Urban Development Institute of Australia
NATIONAL

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President's Foreword

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UDIA National President

Australia's housing challenge is no longer theoretical. It is measurable, spatially identifiable, and increasingly urgent.

The UDIA National Housing Pipeline® (NHP) 2025 Technical Report provides the most grounded, development-industry-vetted assessment of land supply and dwelling delivery capacity in the nation. It combines geospatial land supply auditing, a materially expanded developer survey, technical workshops and cross-jurisdiction engagement to present a clear picture of what can be delivered, where, and when.

The findings are sobering.

Across the combined NHP Capital City regions, forecast dwelling production over the five years to FY2030 will fall approximately *380,000 dwellings short* of stated housing targets. This shortfall persists despite modest strengthening in greenfield feasibility in some corridors. It reflects systemic delivery constraints, not a lack of intent or innovation from industry.

The Real Supply Reality

One of the defining insights of NHP 2025 is the scale of constraint embedded within nominal land supply.

Across all reporting regions, approximately *40% of undeveloped residentially zoned land* is development constrained. Environmental overlays remain the dominant constraint category nationally, but infrastructure and servicing limitations are also materially reducing effective supply.

In practical terms, not all zoned land is development-ready land and the NHP will assist UDIA to continue to work proactively with Government agencies to unlock these constraints.

This distinction is critical. Government land supply dashboards often reflect theoretical supply because commercially sensitive developer insight on the realistic supply impacts are not available to the decision makers. The NHP measures deliverable supply, land that is zoned, serviced, financeable, and capable of progressing through approvals within realistic timeframes.

The gap between those two views is where Australia's housing shortfall resides. The only way to get ahead of the housing crisis, is to track that deliverable supply.

Infrastructure: The Single Largest Delivery Gate

The 2025 NHP Developer Intentions Survey, recorded a 46% uplift in data coverage compared to last year, confirms that infrastructure sequencing remains one of the most powerful determinants of delivery timing.

- 33% of detached greenfield survey yield requires enabling infrastructure funding commitment to proceed.
- Trunk water and sewer infrastructure are the most prevalent bottlenecks nationally.
- Regional and state road infrastructure is the second largest constraint.

These are not abstract impediments. They represent hundreds of thousands of dwellings whose timing is directly linked to government investment decisions and coordination settings.

The Federal Government's latest deal with the South Australian Government as part of their 100,000 First Home Buyer Program, is the first initiative that directly combats this infrastructure gap at scale.

It uses loans for water infrastructure, urban renewal and grants as well as matched State funding for housing that helps middle Australia as well as first home buyers.

The agreement is expected to unlock 17,000 new homes across South Australia, including almost 7,000 for first home buyers. But critically, it is a model that can (and must), be replicated nationwide to catch up to the supply crisis.

If we are serious about meeting national housing targets, infrastructure funding and sequencing reform must sit at the centre of the policy response.

Greenfield Supply: Australia's Most Scalable and Cost-Effective Lever

The NHP 2025 findings reinforce a point that has become increasingly clear through industry and government dialogue this year that ***greenfield housing supply remains Australia's most scalable, lowest per-dwelling cost pathway to increasing total dwelling output in the short to medium term.***

While infill and apartment markets remain essential components of a balanced housing system the feasibility challenges, particularly in the multi-unit sector, are materially constraining delivery. NHP 2025 survey data indicates that a significant proportion of forward apartment supply is currently unfeasible under prevailing construction cost and financing conditions.

If the objective is to close the ***380,000 dwelling gap***, accelerating development-ready greenfield supply must form part of the national solution while urban densification is unlocked in parallel.

Environmental Approvals and Offsets

Another important insight from the 2025 NHP survey is the material volume of dwellings requiring environmental approvals:

- 28% of total survey supply requires environmental approvals.
- 17% requires Federal environmental approvals.
- 43% of those approvals involve offset requirements.

There is broad industry support for robust environmental outcomes. However, the timeframes, concurrence processes and offset market inefficiencies are increasingly contributing to delivery uncertainty.

Predictability and coordination, not deregulation, are the key reform levers.

UDIA is engaged with Government to reform the Environmental approvals process through two crucial strategies:

1. Working directly with the Environmental department to fix the existing process, develop a reliable approval pathway and clear the decks of delayed projects; and
2. Working with the whole of Government on environmental reform that gives industry a predictable simple decision- making process for timely development.

A streamlined, practical process that balances industry and environmental needs are in everyone's interests. The NHP is a blueprint for finding this balance for housing.

A More Collaborative Path Forward

The encouraging development over the past year has been the increasing convergence between industry and government in recognising the nature of the constraints.

There is now greater acknowledgement that:

- Not all zoned land is deliverable land.
- Infrastructure sequencing and funding models matter.
- Approval system complexity has cumulative impacts.
- Feasibility constraints in the apartment sector are structural.

The NHP provides a shared evidence base to inform reform.

UDIA will work collaboratively with Federal, State and Local Governments to:

- Prioritise enabling infrastructure investment in development-ready corridors.
- Streamline and coordinate approval pathways.
- Improve transparency around real land readiness.
- Support feasibility recovery in the infill sector.
- Bring more projects into the "development-ready" intersection of zoned, serviced and financeable projects.

A National Imperative

Australia's housing challenge will not be resolved by targets alone. It will be resolved through delivery alignment to these targets by region with all levels of Government addressing local constraints.

The UDIA National Housing Pipeline® continues to evolve as a rigorous, transparent, and industry-grounded assessment of delivery capacity. It is intended to complement government monitoring programs and to provide clarity where aggregate numbers can obscure reality. This will inform better decision making and prioritisation of efforts.

The 2025 findings are clear, without coordinated infrastructure investment, environmental approval reform and a pragmatic approach to unlocking greenfield supply, the national housing targets will remain a long way out of reach.

The opportunity remains within our grasp, but only if we focus on what can genuinely be delivered, not what is theoretically possible.

This NHP 2025 Executive Summary Report and the accompanying NHP Technical Report provide key findings, insights and recommendations collated across the NHP 2025 program.

At a Glance:
NHP 2025 Headline Results

1. *The 2025 NHP dwelling production informed forecast for Australia is a ~380,000 homes short of the National Housing Accord five-year dwelling target supply target rate (FY26 – FY30).*

-380k National Dwelling Shortfall

V5 Year National Housing Targets (394k NHP 24)

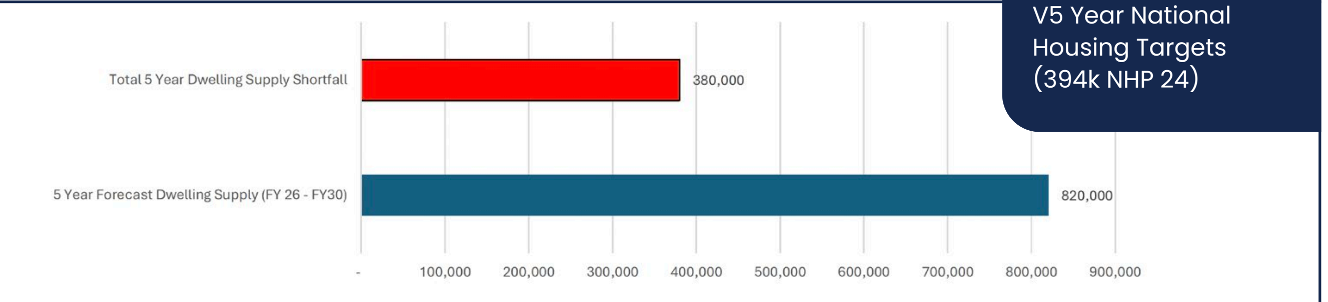


Figure 1: NHP 2025 - National Dwelling Supply Forecast and Dwelling Supply Shortfall

Source: UDIA

2. *40% of all identified undeveloped residential zoned land stocks across NHP reporting regions has development constraint overlays which will sterilize or significantly reduce forward dwelling production.*

40% Zoned Land Development Constrained

(37% NHP 24)

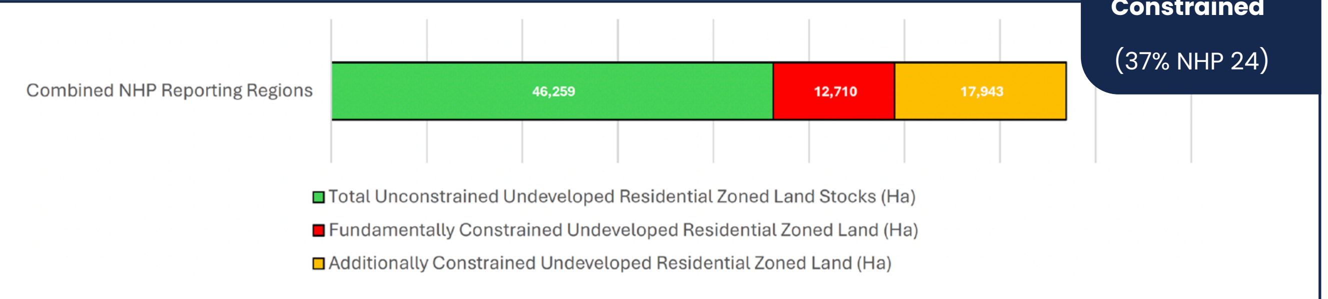


Figure 2: NHP 2025 - Aggregate Land Supply Snapshot: Undeveloped Residential ZOned Land Stocks (Nov. 2025)

Source: UDIA

3. *33% of all NHP 2025 detached house survey yields require one or more types of enabling infrastructure funding commitment to progress to dwelling commencement status.*

33% Greenfield pipeline needs Infrastructure Commitment / Funding

(33% NHP 24)

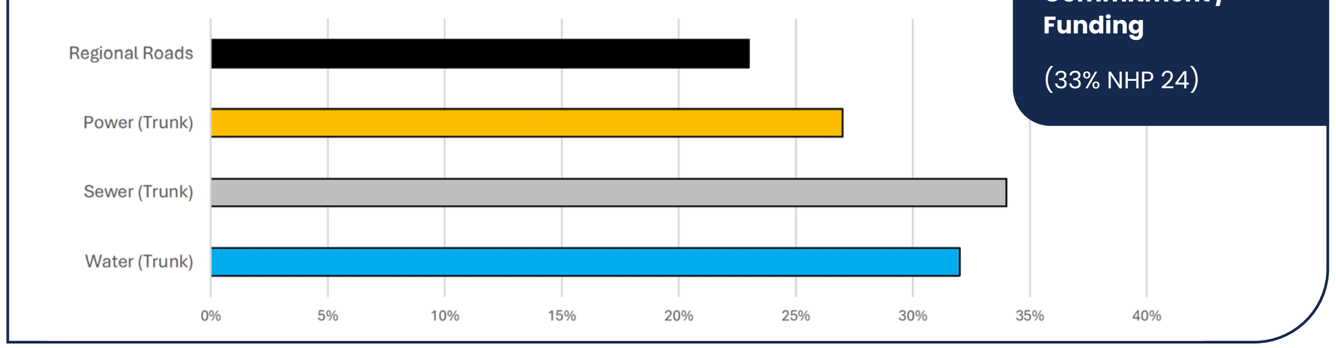


Figure 3: NHP 2025 - Combined Capital City Proportion of Greenfield NHP Survey Yield requiring Government Funding Commitment by Infrastructure Type

Source: UDIA

At a Glance:
NHP 2025 Headline Results

Table 1: NHP 2025 Headline Insights

Greater Sydney Mega-Region	**6,328** Hectares of undeveloped 'unconstrained' residential zoned land	**4.89 years*** Of unconstrained zoned residential land supply @ National Housing Accord annual dwelling target take-up rate	**34%** Of surveyed greenfield yield requires commitment/funding for enabling infrastructure
South East Queensland	**10,770** Hectares of undeveloped 'unconstrained' residential zoned land	**5.85 years*** Of unconstrained zoned 'short + medium' residential land supply @ National Housing Accord annual dwelling target take-up rate	**44%** Of surveyed greenfield yield requires commitment/funding for enabling infrastructure
Greater Melbourne & Geelong	**15,944** Hectares of undeveloped 'unconstrained' residential zoned land (growth regions)	**6.26 years*** Of unconstrained residential land supply @ National Housing Accord annual dwelling target rate	**16%** Of surveyed greenfield yield requires commitment/funding for enabling infrastructure
Greater Perth	**8,202** Hectares of undeveloped 'unconstrained' residentially zoned land supply	**5.96 years*** Of unconstrained residential land supply @ National Housing Accord annual dwelling target rate	**30%** Of surveyed greenfield yield requires commitment/funding for enabling infrastructure
Greater Adelaide	**4,934** Hectares of combined zoned 'unconstrained' residential land supply	**5.71 years*** Of unconstrained residential land supply @ National Housing Accord annual dwelling target rate	**31%** Of surveyed greenfield yield requires commitment/funding for enabling infrastructure
Combined Capital Cities	**46,259** Hectares of undeveloped 'unconstrained' residentially zoned land supply	**5.66 years*** Of unconstrained residential land supply @ National Housing Accord annual dwelling target rate	**33%** Of surveyed yield requires commitment/ funding for enabling infrastructure

**Theoretical dwelling capacity (gross) based on LGA scale aggregation of location-based average density generated dwelling yield potential.*

NHP Project
Methodology Outline

The UDIA National Housing Pipeline® methodology has been designed as an evolving data and insights collation exercise, achieved through a strategic collaboration between UDIA National and each UDIA State Division, UDIA's developers and broader development sector membership, and each level of government.

The UDIA NHP harnesses a combination of 'top-down' and 'bottom-up' data inputs to provide a robust and holistic perspective on the status of residential land supply , and the implications for future housing production across each major Capital City Region.

The UDIA National Housing Pipeline® is designed around five key phases as set out in Figure 5 below.

Land Supply & Development Constraints Mapping

Phase 1: Collation of up-to-date undeveloped urban zoned land and potential future urban zoned land for residential development. These land stocks are then overlaid with various 'development constraints' to identify what land is actually available for forward residential development.

Developer Intentions Survey

Phase 2: Deployment of a bespoke digital NHP Developers Intentions Survey tool which identifies developers undeveloped land holdings, total and year-on-year dwelling yield expectations as well as the status of planning, development, environmental and enabling infrastructure requirements.

Technical Workshops

Phase 3: Assembly of industry experts in a facilitated workshop environment to pressure test the Phase 1 preliminary findings and provide advice on additional supply points not accounted for in Phase 2.

Outlook Forums

Phase 4: Delivery of sub-regional scale Outlook Forums which bring together developers, Councils, State Government Agencies, infrastructure providers and consultants to present Preliminary NHP findings and collect further insights on development constraints, approval blockages, land supply and infrastructure servicing challenges.

Reporting & Advocacy

Phase 5: National and State scale reporting and advocacy focused on key NHP program highlights including aggregate stocks of 'development ready' land supply, blockages in approval pathways and enabling infrastructure provision and 10 year forecasts of dwelling pipelines by typology.

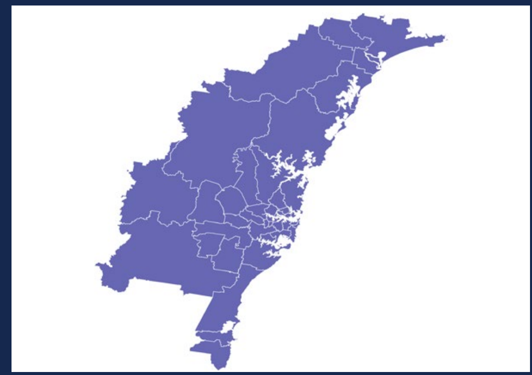
Engagement with Government

Prior to the commencement of these five project phases, and also throughout each of the project phases, UDIA engages with a broad array of local, State and Commonwealth government agencies on how the NHP data and insights can complement existing government land supply and infrastructure coordination programs such as the Urban Development Programs in NSW, Victoria and Western Australia, the Growth Monitoring Program in QLD, and the Plan SA Land Supply Dashboard.

Figure 4: The UDIA National Housing Pipeline® Methodology

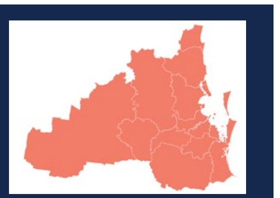
NHP 2025
Capital City Reporting Regions Land Supply Summary

Sydney Mega-Region



- **17,640 hectares** of undeveloped residential zoned land stocks (aggregate).
- **6,328 hectares** of unconstrained residential land stocks available for residential development.
- **64%** of all undeveloped zoned land for residential development is development constrained with a total yield impact of ~309,870 dwellings.
- **4.89 years** of unconstrained residential land supply @ National Housing Accord annual dwelling target rate (~58k).

South East Queensland

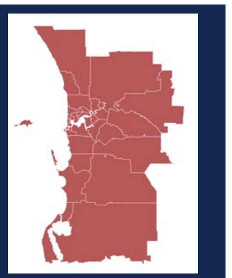


- **10,770 hectares** of unconstrained residential zoned land stocks (includes all land in pipeline).
- **5,274 hectares** of unconstrained future residential land stocks (includes all land in pipeline).
- **36%** of all undeveloped zoned land for residential development is fundamentally constrained and unable to deliver new dwelling supply.
- **5.85 years** of unconstrained residential land supply @ National Housing Accord annual dwelling target take-up rate (~36k).

Greater Melbourne

- **21,815 hectares** of undeveloped residential zoned land stocks (Growth Regions - aggregate).
- **16,025 hectares** of unconstrained & undeveloped residential land stocks available for residential development (Growth Regions).
- **27%** of all undeveloped zoned land for residential development is development constrained with a total yield impact of ~144,780 dwellings.
- **6.26 years** of unconstrained residential land supply @ National Housing Accord annual dwelling target take-up rate (~50k).

Greater Perth



- **8,202 hectares** of unconstrained undeveloped residentially zoned land for residential development.
- **3,580 hectares** of unconstrained Urban Deferred zoned land & a further 6,252 hectares of unconstrained Potential Future Urban zoned land stocks.
- **35%** of all undeveloped residential zoned land is development constrained with a total yield impact of ~90k dwellings.
- **5.96 years** of unconstrained zoned residential land supply @ National Housing Accord annual dwelling target take-up rate (~21k).

Greater Adelaide

- **1,518 hectares** of unconstrained 'Development Ready'* zoned residential land.
- **3,416 hectares** of unconstrained zoned residential land with no active development approvals, & 1,493 hectares of unconstrained deferred urban land stocks.
- **43%** of all undeveloped zoned and potential future zoned land earmarked for residential developed fundamentally constrained and unable to deliver new dwelling supply.
- **5.71 years** of unconstrained residential land supply @ National Housing Accord annual dwelling target rate (~13k).

NHP 2025 Phase One **Land Supply & Development Constraints Mapping Overview**

UDIA commissioned several geospatial consulting firms to undertake the base-line aggregate NHP 2025 land supply and development constraints analysis. The consultants worked closely with each UDIA State Division office and a dedicated Project Control Group to help guide the assessment approach and range of inclusions and assumptions.

The NHP 2025 land supply assessment once again sought to identify only residentially zoned land parcels that appear to have genuine residential development potential. This included the removal of land parcels with significant built form development coverage, as well as parcels with clearly identifiable community infrastructure and other land uses which indicates unlikely development potential in the short to medium term.

Working closely with a Project Control Group of industry experts, each consultant and each UDIA State Division collaboratively narrowed down a set of constraint layers which were categorised as follows:

A. **Fundamental Development Constraints** – constraints that effectively sterilize a site from future residential development yields.

B. **Additional Development Constraints** – constraints that will make it challenging to develop but where future dwelling yields may be able to be realised once the constraint is able to be mitigated/resolved.

- *Greater Sydney Megaregion* features the *greatest* combined volume of *constrained land stocks* (~11,300 Ha),
- *South East Queensland* has the most ***fundamentally constrained greenfield land supply profile*** (~6,120 Ha) across the NHP 2025 reporting regions.
- Across all NHP 2025 Capital City Reporting Regions 40% of all assessed land stocks held either a fundamental or additional constraint which will result in dwelling yield reduction or sterilisation.

Figure 5: Aggregate Undeveloped Residential Zoned & Potential Future Residential Zoned Land Stocks (August 2025)

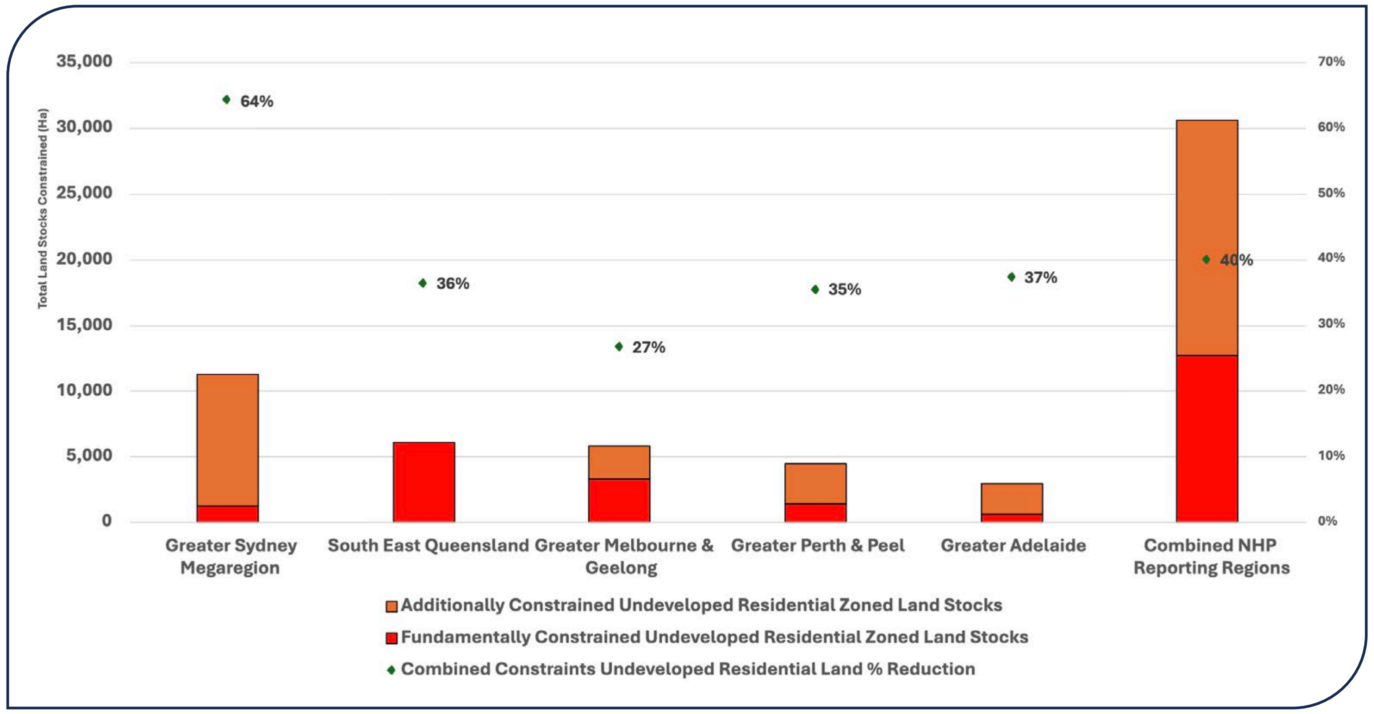


Figure 6: NHP 2025 Development Constraints Assessment Summary (August 2025)

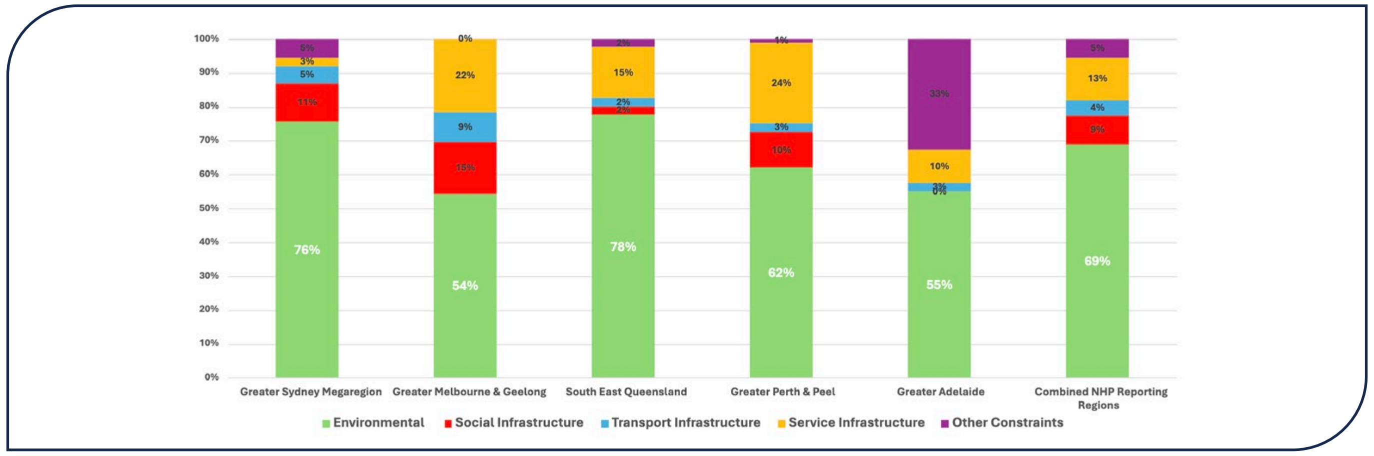


Figure 7: Proportion of Undeveloped Residential Land Identified as Constrained' by Constraint Category (August 2025)

NHP 2025 Phase Two
Developers Intentions Survey

Overview

The NHP Developers Intentions Survey (NHP Survey) is a cornerstone data collation and insights element of the UDIA NHP program. The NHP survey involves developers and landowners submitting a range of information and insights about the status of all undeveloped landholdings within their portfolios (including undeveloped portions of active projects) and future development intentions.

NHP 2025 Survey phase recorded a 46% increase in total survey dwelling yield collected, compared to the NHP 2024 Pilot.

The major uplift in NHP 2025 developer participation was recorded from UDIA Victora's developer members (+277%) and UDIA SA developers (+1924%) with UDIA WA's developers once again submitting the largest volume of survey yield with a forward pipeline of ~110,000 dwellings.

In total 116 developers submitted survey results across the country with combined total dwelling yield pipeline of 379,000 dwellings.

The headline Development Delivery insights from the NHP 2025 survey at the Combined Capital city scale include:

- *27%* of total dwelling yield requires rezoning to proceed.
- *45%* of dwelling yields requires Planning or Development Approvals to proceed.
- *38%* of forward apartment yields are not currently feasible to deliver in current market conditions.
- *80%* of currently unfeasible apartment yield is due to Construction/Development Costs.

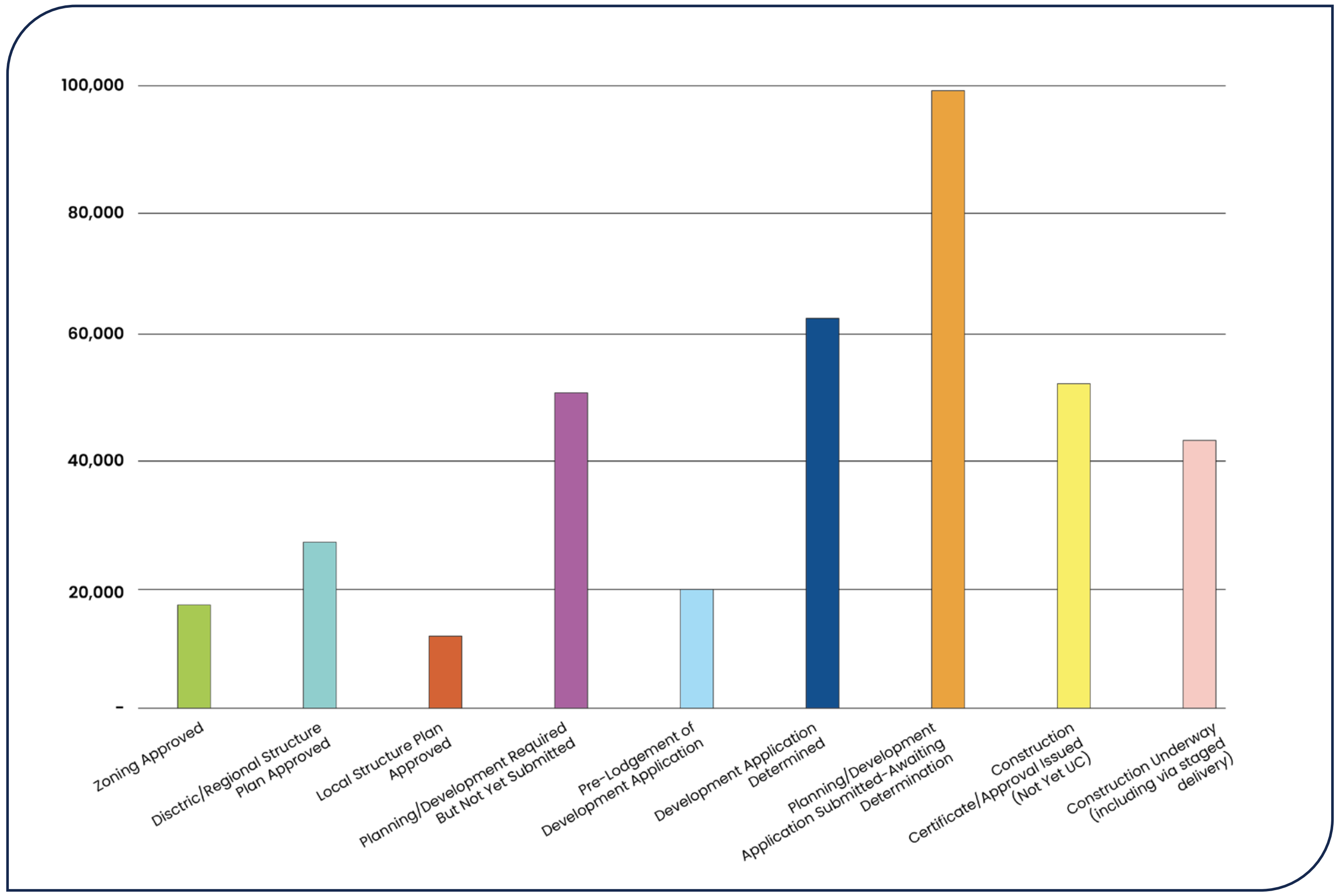


Figure 8: NHP 2025 Planning & Development Status of Forward Dwelling Yield (NHP 2025 Survey) Combined Capital City Regions

*also includes a small number of non UDIA member land holdings

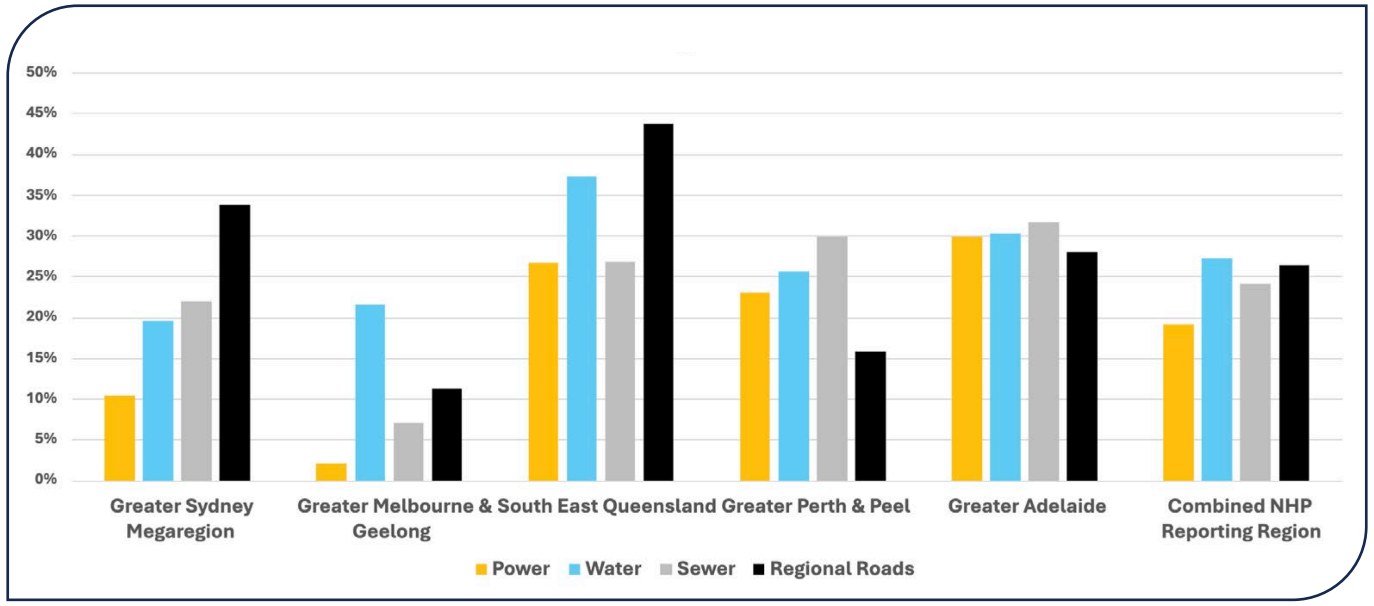


Figure 9: Proportion of NHP 2025 Detached House Survey Yield Requiring Enabling Infrastructure Funding/Commitment, by Type

- *33%* of all Capital City NHP survey yields require one or more types of enabling infrastructure funding commitment to progress to dwelling commencement status.
- *Truck Water Infrastructure* is the most prevalent challenge facing developers' ability to deliver new detached stock across our nation's greenfield release regions – with an estimated *500,000+* dwellings at delivery risk nationwide*.
- Regional/State Roads are the second most significant infrastructure hurdle facing developers - with an estimated *450,000* new dwellings at delivery risk*.
- *South East Queensland* has the greatest proportional amount of forward dwelling supply at delivery risk with *44%* of future detached house yield contingent on timely government funding and delivery commitment.

The NHP & Annual Housing Targets and Annual Dwelling Targets

Combined Capital City Dwelling Shortfall

The annual reporting cycle of the UDIA National Housing Pipeline® allows for a regular stocktake of how each NHP reporting region is tracking against State & Territory targets.

A five-year dwelling production forecast is provided for each capital city reporting region in the State chapter summaries following - based on core NHP data in addition to additional supply intelligence*. In future NHP reporting releases UDIA intends to publish ten- year dwelling production forecasts for each reporting region – subject to the heightened volumes of developer intentions survey submissions.

At the combined NHP Capital City reporting scale, Figure 18 presents the long run history of aggregate dwelling completions & approvals as well as the NHP 2025 five-year supply forecast to 2030. This analysis indicates that there will be a circa ***287,000 dwelling completion shortfall*** within the NHP capital city reporting regions against the National Housing Accord annual dwelling target (178,320 dwelling per annum, based on proportion of population) assembled across each reporting region.* When this NHP Capital City forecast is scaled up to the whole of Australia, the total five year shortfall is estimated to be around ***380,000 dwellings*** short of the 1.2 million new homes aspired under the Accord. This significant shortfall of new dwelling supply is underpinned by expectations of sustained weakness in the multi-unit sector.

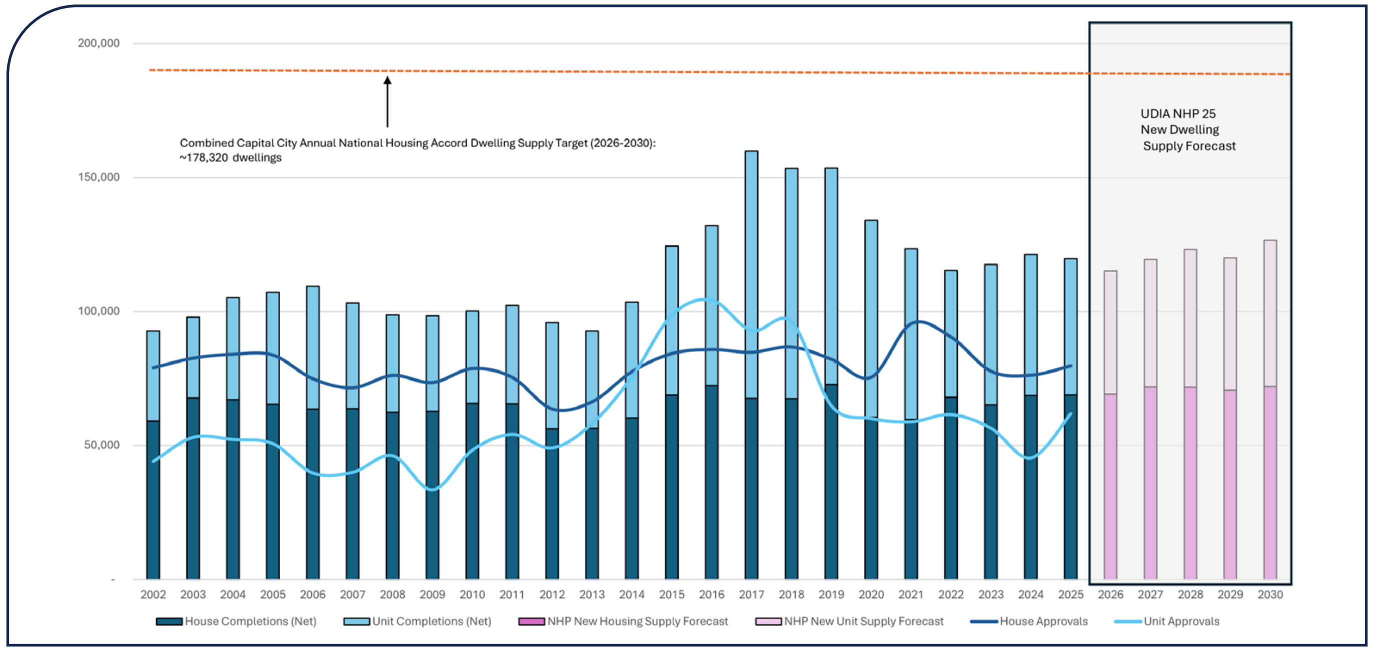


Figure 10: Combined NHP Capital City Region Dwelling Completions, Approvals & Aggregate NHP Dwelling Supply Forecast (FY)

Figure 11: NHP 2025 Cumulative Dwelling Supply Forecast v Cumulative Annual Housing Accord Dwelling Target

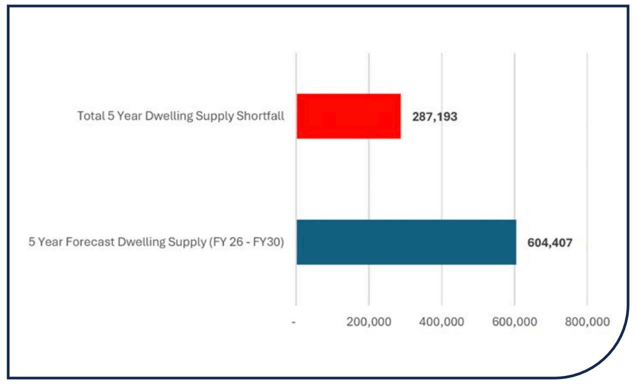


Figure 12: NHP 2025 Combined Capital City Dwelling Shortfall & Forecast Supply (FY26 - FY30)

*The NHP 2025 dwelling forecast methodology utilises a 'bottom-up/top-down' moderated data assembly approach. 10 key input data points (including NHP land supply & developer intentions) feed into LGA/Sub-Region/Capital City scale produced year-on-year forecasts across a ten year pipeline horizon. NHP 2025 forecasts are published for a five year outlook.

NHP Capital City Region Supply Forecast vs Targets (2026-2030)

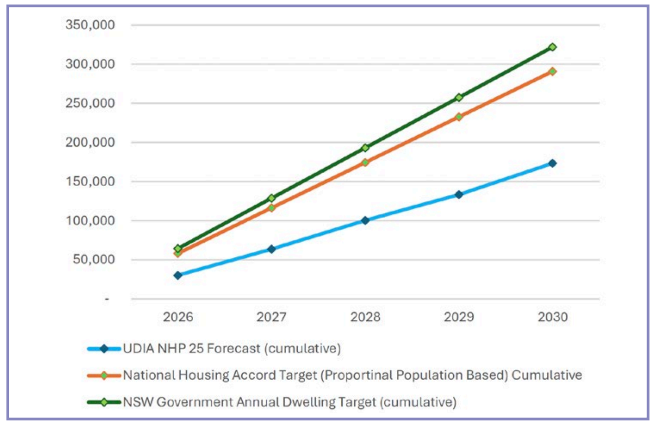


Figure 13: NHP 2025: Sydney Megaregion - Cumulative Dwelling Supply Forecast V National Housing Accord Target

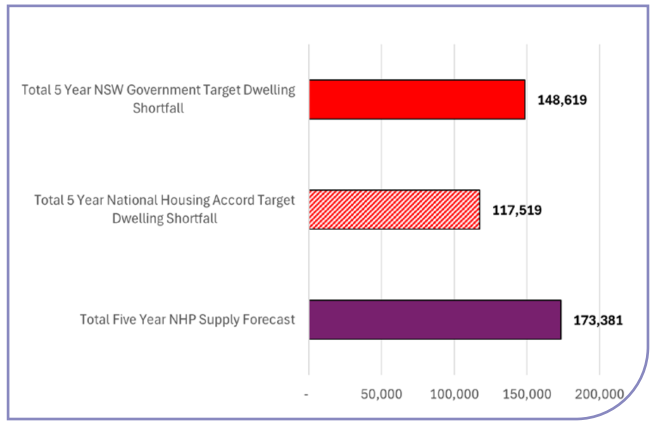


Figure 14: NHP 2025: Sydney Megaregion - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

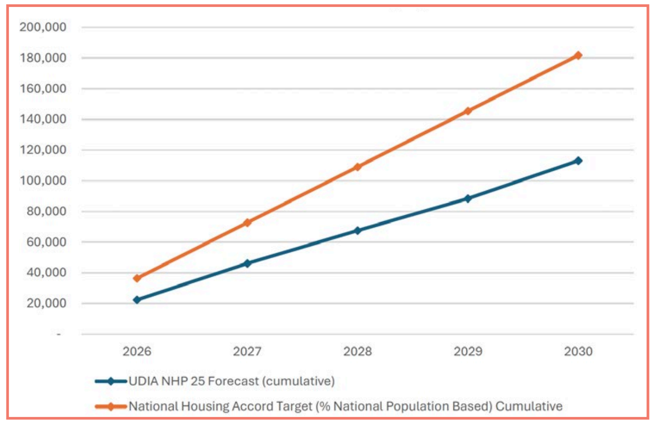


Figure 15: NHP 2025: SEQ - Cumulative Dwelling Supply Forecast V National Housing Accord Target

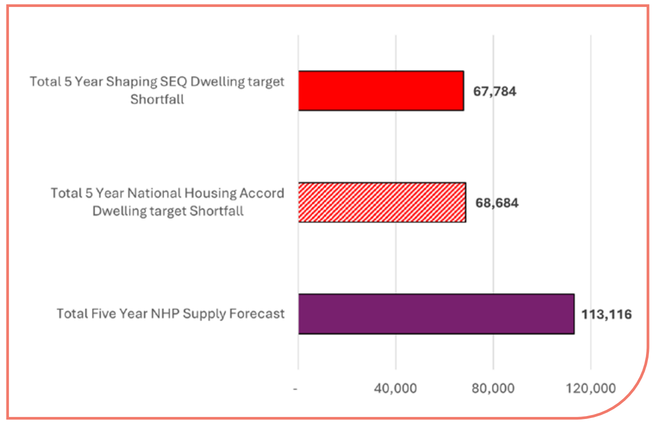


Figure 16: NHP 2025: SEQ - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

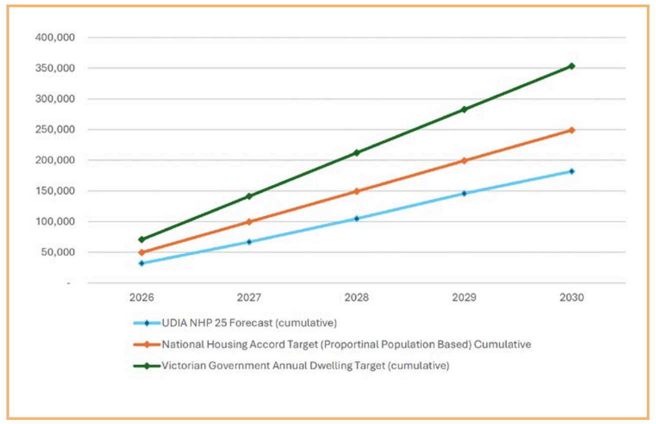


Figure 17: NHP 2025: Greater Melbourne & Geelong - Cumulative Dwelling Supply Forecast V National Housing Accord Target

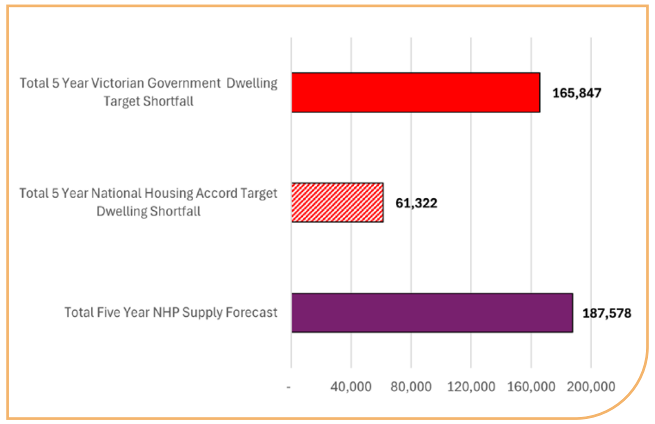


Figure 18: NHP 2025: Greater Melbourne & Geelong - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

NHP Capital City Region Supply **Forecast vs Targets (2026-2030)**

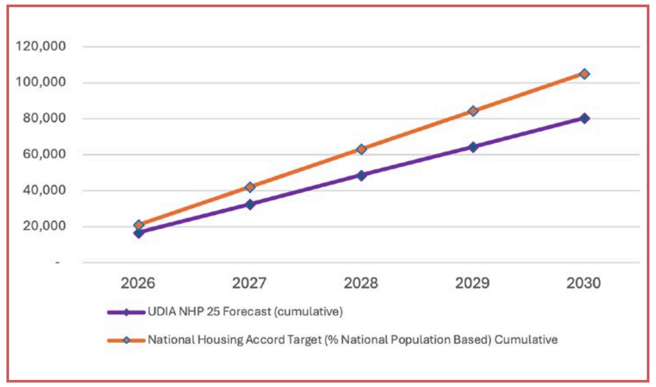


Figure 19: NHP 2025: Greater Perth - Cumulative Dwelling Supply Forecast V National Housing Accord Target

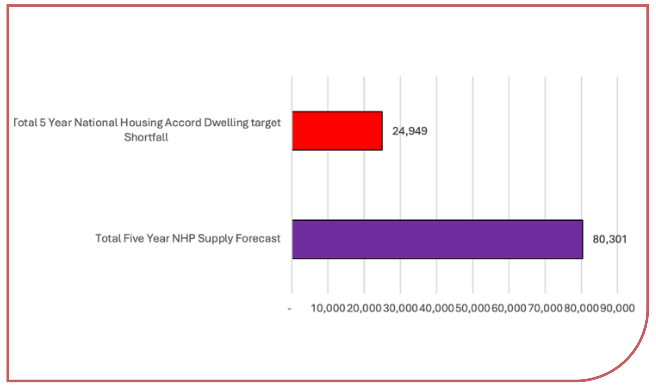


Figure 20: NHP 2025: Greater Perth - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

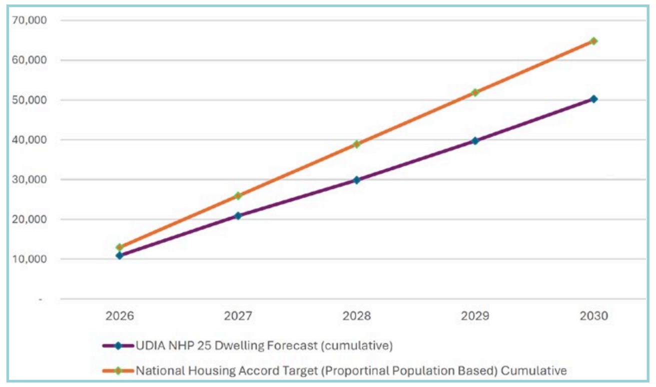


Figure 21: NHP 2025: Greater Adelaide - Cumulative Dwelling Supply Forecast V National Housing Accord Target

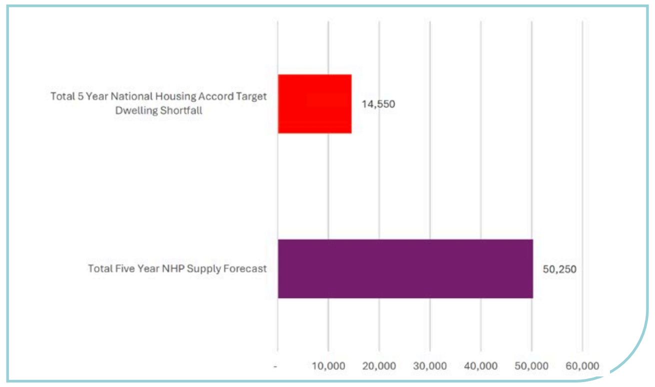


Figure 22: NHP 2025: Greater Adelaide - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

UDIA National Recommendations

Based on the NHP 2025 analysis, UDIA offers the following recommendations to each State Government and the Federal Government to help boost forward housing supply.

The National Housing Accord new dwelling target is crucial to track our path out of housing crisis and address the roadblocks – including lack of new housing supply, development ready land & enabling infrastructure and slow planning/environmental approvals. The NHP starkly demonstrates where these roadblocks are to focus Government's efforts.

Government has important initiatives to tackle housing supply, but we need to broaden the strategy to the whole housing supply market, across the continuum and tackle all roadblocks.

97% of the Accord target relies on private development but 85% of housing is delivered by smaller to medium sized organisations (SME's) that cannot access the HAFF due to scale.

We need to harness Australia's entire housing supply capacity with market-wide solutions including:

1. Build the Homes We Need

- Bost delivery of First Home Buyer Housing (FHB).
- Remove housing supply barriers through FHB initiative (or upfront Accord Bonuses).
- Increase the Accord Bonus (or create another bonus fund).
- Double HAFF funding for more Affordable and Social Housing.

2. Fast-Track Housing Infrastructure

- Direct Federal funding of housing enabling infrastructure.
- Prioritise existing Federal infrastructure funding that supports new housing.
- Use part of the Accord Bonus to fund infrastructure upfront.

3. Release More Land Supply

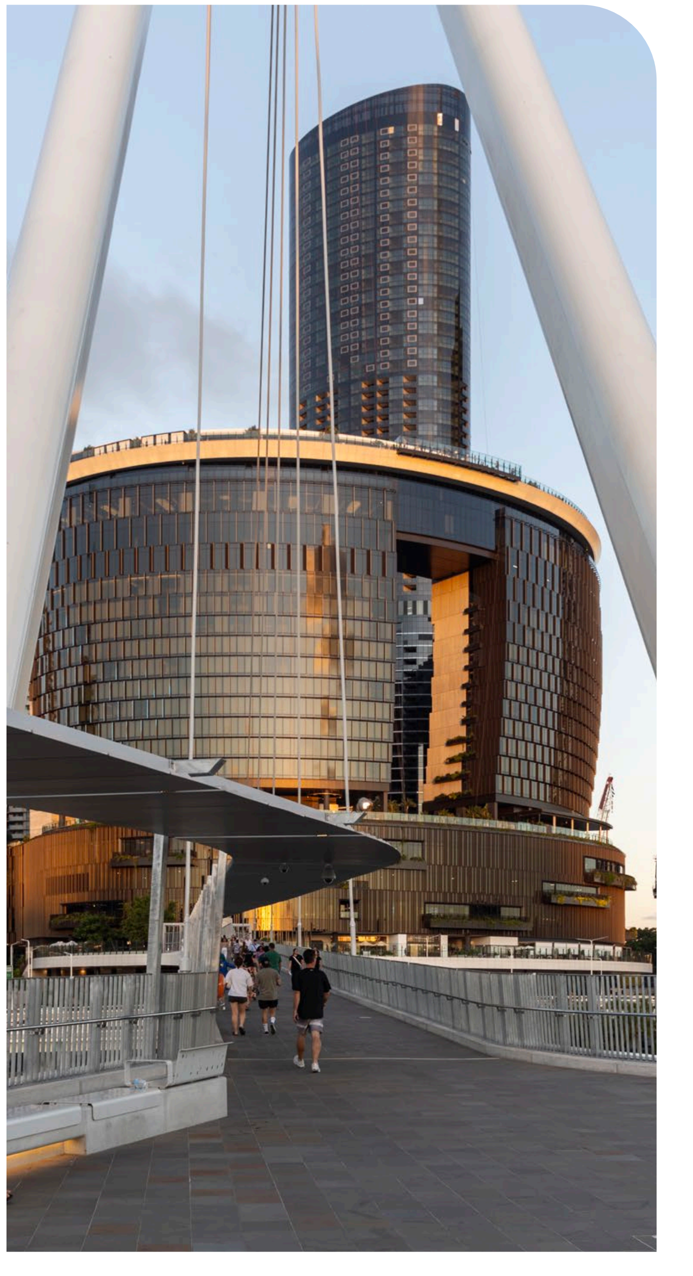
- Supply Government land for diverse private housing projects.
- Incentives for development ready land and halved planning times, unlock surplus Government land.
- Fast-track housing with Federal Construction Debt and Equity Guarantees.
- Establish independent housing performance metrics.

4. Environmental Housing Strategies

- Clear the EPBC housing approval backlog.
- Align State & Federal criteria as a single, simple EPBC approval.
- Incentivise Green Technology in well priced housing.

5. Boost Housing Capability

- Minimise property fees and taxes holding back affordability.
- Increase stamp duty thresholds, fast-track the National Construction Code Reform.
- Prioritise housing-skilled migrants & accelerate residency for migrants.



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