UDIA National Housing Pipeline®

National Overview 2025

Technical Report

Released March 2026

Urban Development Institute of Australia
NATIONAL

Acknowledgements

The UDIA National Housing Pipeline® is a collaborative research program involving an annual cycle of activities and data collation which would not be possible without the assistance and support from a broad range of stakeholders and collaborators, which includes:

UDIA State Divisions - for driving the local collation of key data inputs and insights.

UDIA members – for providing invaluable project scale data and insights through the NHP survey phase, as well as participating in NHP Technical Workshops and NHP Outlook Forums across the nation.

The Australian Urban Design Research Centre (AUDRC) – for facilitating the creation of the original NHP Developer Survey tool in 2023, and the year-on-year modifications and improvements to the tool in the subsequent years.

Geospatial Consultants – in each State, specialised consultants work with UDIA State Divisions and a dedicated NHP Project Control Group to refresh land supply and development constraints layers for annual NHP reporting. For NHP 2025 the following consultants were engaged:

- **MNG:** For NSW, Victoria and Western Australian geospatial analysis
- **JFP:** For QLD geospatial analysis
- **Alexander Symonds:** For SA geospatial analysis

URBIS – for working with UDIA State Divisions to increase the depth of infill supply intelligence in the NHP reporting for the 2025 program.

Government Authorities & Agencies – Federal, State and Local Government authorities and agencies across the nation continue to be receptive and supportive of the NHP program inclusive of provision of various spatial and tabular data sets which have been assimilated into the baseline reporting.

Contents

President's Foreword

Oscar Stanley
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.

President's Foreword Cont.

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.

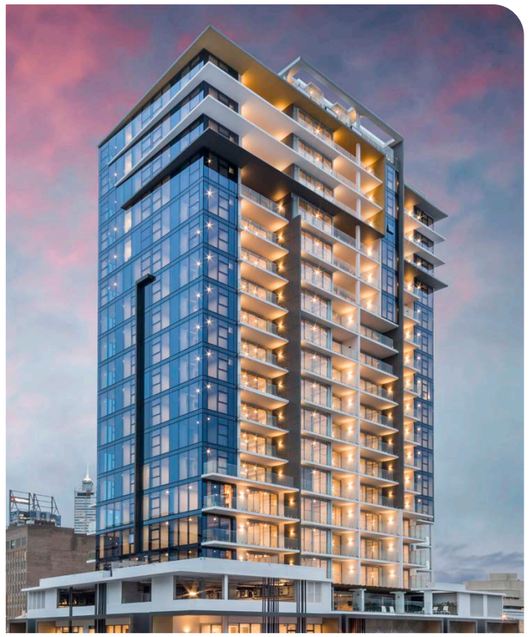
A National Imperative

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.



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)

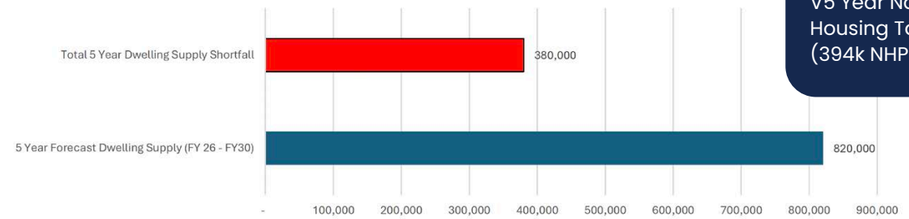


Figure 1: NHP 2025 - National Dwelling Supply Forecast and Dwelling Supply Shortfall *Source: UDIA*

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

40% Zoned Land Development Constrained

(37% NHP 24)

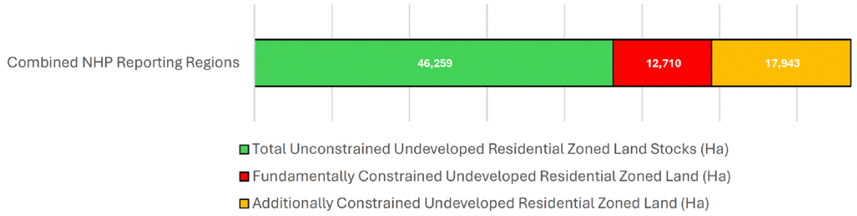


Figure 2: NHP 2025 - Aggregate Land Supply Snapshot: Undeveloped Residential ZOned Land Stocks (Nov. 2025) *Source: UDIA*

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)

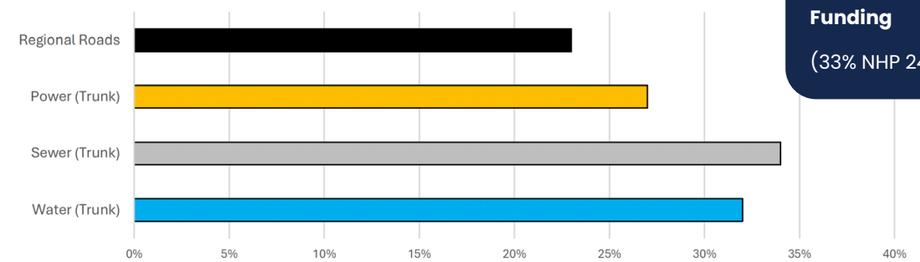


Figure 3: NHP 2025 - Combined Capital City Proportion of Greenfield NHP Survey Yield requiring Government Funding Commitment by Infrastructure Type *Source: UDIA*

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.*

About the UDIA National Housing Pipeline®

Background to the UDIA National Housing Pipeline® (NHP)

UDIA has long advocated that there is an ongoing disconnect between State and Territory government reporting of available land supply for forward residential development, versus the on-the-ground experience and perspective of forward land availability from developers and industry practitioners.

Across the nation UDIA members have consistently reported (for at least the last two decades) that State Government land supply monitoring programs have an incomplete lens on genuinely 'development ready' land supply. This is because the various 'Urban Development Program' type programs operational across the nation in various guises have invariably focused on assembly of aggregate zoned land stocks for calculating forward dwelling production potential – without robustly accounting for the array of development constraints and challenges facing developers in the new dwelling production process.

There has also been inconsistent and patchy inclusion of site-by-site development intelligence provided directly by developers and land-owners into forward land supply and dwelling production exercises.

The UDIA National Housing Pipeline® has been designed to help 'address the gaps' in the key inputs and methodological inclusions/exclusions of official State Government land supply monitoring programs.

NHP 2025: Key Project Aims

Led by UDIA National in close collaboration with each UDIA State Division, and engagement with members and industry participants across the nation, the UDIA NHP seeks to provide comprehensive data and insights into Australia's future housing supply pipeline and shine a spotlight on key development constraints and challenges to delivering forward supply.

The UDIA NHP generates unique supply and constraints data, which is supplemented with additional supply intelligence to produce greenfield and infill supply ten-year forecasts by LGA/Growth Corridor/Greater Metropolitan Region scales.

The headline Project Aims for the UDIA NHP are:

1. To provide an objective and robust annual assessment of the state of play of ***land availability*** and ***land readiness*** for residential development across Australia's major housing markets.
2. To quantify and provide an ***industry-vetted*** perspective on the forward ***10-year pipeline of land supply*** and ***residential dwellings*** anticipated for development, by location with annualised completion estimates (across both ***greenfield*** and ***infill*** locations) for each of Australia's ***major capital city regions.***
3. To provide an annual assessment of ***development constraints*** as well as an audit of the status of ***enabling infrastructure*** (water, sewer, power, roads) and approvals required to realise these yields.
4. Provide a ***five year forecast*** of ***aggregate dwelling supply*** for each NHP Reporting Region, and provide an assessment of forecast supply versus dwelling target 'shortfall'.

The UDIA National Housing Pipeline®'s 'Golden Nugget'

The UDIA National Housing Pipeline® (NHP) provides an annual snapshot of the 'real supply' of land available for residential development across Australia's major urban regions over the short, medium and longer-term horizons; including estimates of forward dwelling production potential – informed by an array of developer provided data and intelligence.

The NHP uniquely provides a development industry-vetted perspective on the status of 'development ready' land supply, by linking how much total potential supply is constrained or unable to be developed due to constraints (such as environmental or infrastructure) as well as quantifying how much 'real world' potential dwelling supply is being held up by planning and environmental approvals, as well as service infrastructure provision planning requirements and processes.

The land and dwelling capacity data collected is then examined by:

- Geographic location
- Housing typology
- Expected time frame for commencement and completion

There is an increasing convergence of understanding across industry and government on the types of constraints that inhibit or slow housing delivery. There are not, however, consistent ways of measuring or reporting on these constraints – which is an arena the NHP is attempting to fill.

Missing/lagging infrastructure, slow/non-responsive planning and environmental assessment approval pathways, complex concurrence and referrals, and unfavourable market conditions all play a role in constraining the pipeline. Reliable reporting metrics are needed to address the array of limitations in data availability.

The Venn diagram presented in Figure 4 illustrates the role of the NHP in bringing together the disparate factors shoaing development ready land supply.

Without a detailed and up-to-date understanding of real world developer intentions, and without a detailed understanding of the myriad of development constraints and development challenges, government supply estimates have historically reverted to a reliance on theoretical yield estimations, and usually an inflated estimation of how much land is 'development ready'.

The UDIA National Housing Pipeline® has been designed to bridge this data gap, providing a reliable, ground-truthed understanding of what can be delivered where and when over a ten-year housing supply horizon. Using developer intentions, the NHP reveals the regions where genuine opportunities exist to streamline, unlock and bring forward the future housing pipeline with the right infrastructure and planning focus at the right time.

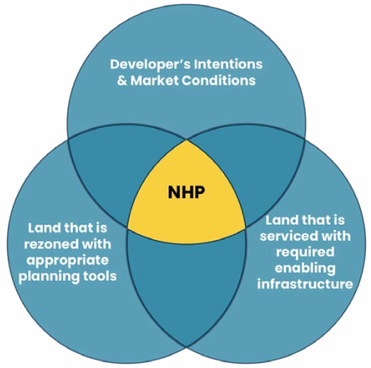


Figure 4: The Development Ready Land Intersection's Golden Nugget

UDIA uses the evidence base in our ongoing advocacy to Government as it seeks to prioritise investment in key housing enabling infrastructure and make planning and policy changes to support the objective of dramatically increased housing delivery by pushing more projects into the 'development ready' portion of the Venn diagram aka 'The Golden Nugget'.

NHP Project Methodology

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.

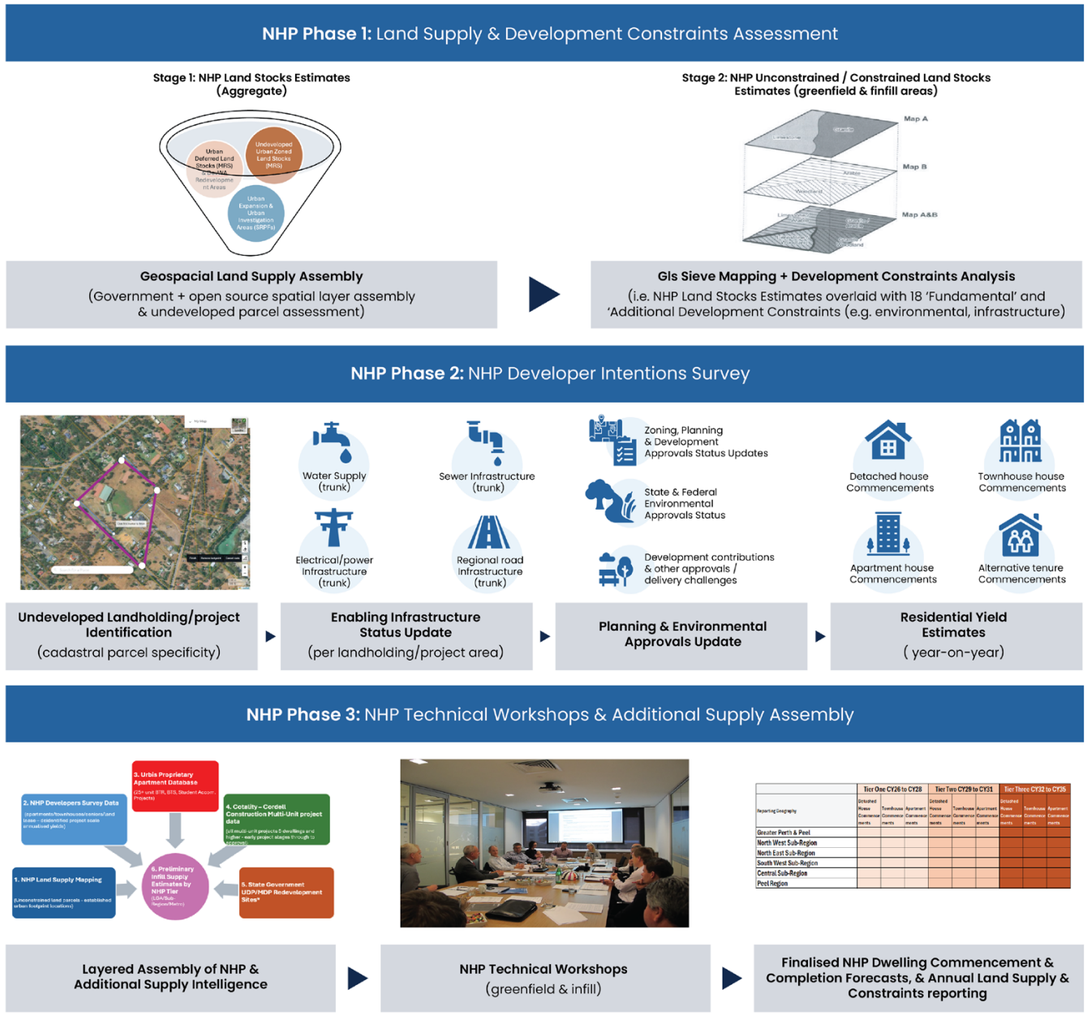
Engagement with Government

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.

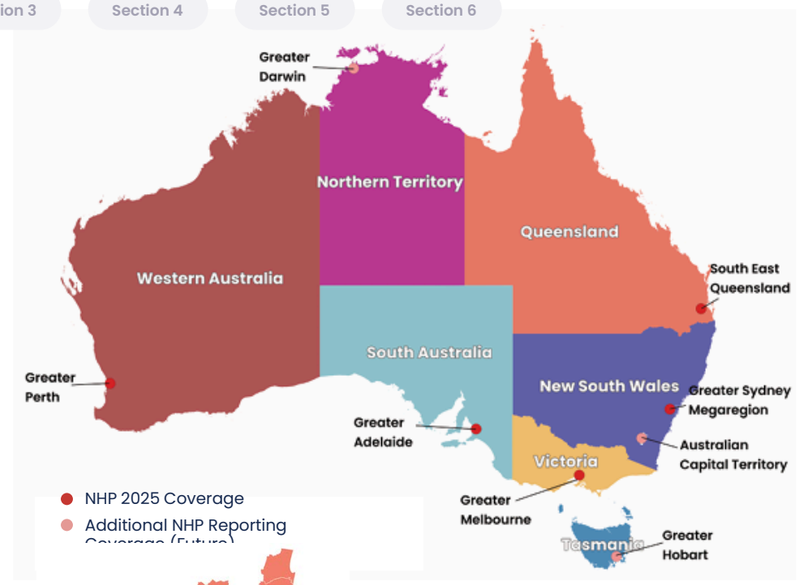
Figure 5: The UDIA National Housing Pipeline® Methodology

The First three phases are the critical data collation phases which are undertaken concurrently across the nation through April to October each year.

- **NHP Phase 1:** Land Supply & Development Constraints Mapping & Analysis (April-July)
- **NHP Phase 2:** Developer Intentions Survey (May-July)
- **NHP Phase 3:** Technical Workshops (August-October)

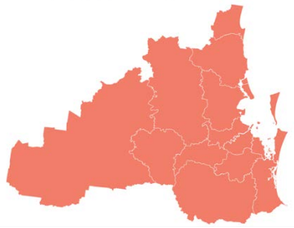


NHP 2025 Reporting Regions



Sydney Mega-Region

- **Total Geographic Area:** 1,727,561 Ha
- **Total Pop.(ABS ERP, 2024):** 6,639,810
- **National Population (%):** 24.42%
- **Local Government Authorities:** 43
- **National Housing Accord Annual Dwelling Target (as % National pop):** 58,180



South East Queensland

- **Total Geographic Area:** 3,527,310 Ha
- **Total Pop.(ABS ERP, 2024):** 4,118,620
- **National Population (%):** 15.15%
- **Local Government Authorities:** 12
- **National Housing Accord Annual Dwelling Target (as % National pop):** 36,360

Greater Melbourne & Greater Geelong

- **Total Geographic Area:** 1,857,117 Ha
- **Total Pop.(ABS ERP, 2024):** 5,640,270
- **National Population (%):** 20.74%
- **Local Government Authorities:** 33
- **National Housing Accord Annual Dwelling Target (as % National pop):** 49,780

Greater Perth

- **Total Geographic Area:** 725,851 Ha
- **Total Pop.(ABS ERP, 2024):** 2,309,400
- **National Population (%):** 8.56%
- **Local Government Authorities:** 32
- **National Housing Accord Annual Dwelling Target (as % National pop):** 21,050

Greater Adelaide

- **Total Geographic Area:** 608,825 Ha
- **Total Pop.(ABS ERP, 2024):** 1,449,170
- **National Population (%):** 5.4%
- **Local Government Authorities:** 27
- **National Housing Accord Annual Dwelling Target (as % National pop):** 12,960

Capital City Regions Covered in the NHP 2025 Study

Comparative Geographic Extents (Scaled)

Scale = **1:2 000 000**

Project Limitations

The 2025 UDIA National Housing Pipeline® program has sought to build on the national NHP Pilot undertaken in 2024, with core data and insights assembly occurring between May and November 2025.

Taking learnings and feedback from the previous year the NHP 2025 program sought to:

- Deploy an improved NHP Developer Intentions Survey and deliver a richer suite of project scale data points and insights.
- Heighten the level of UDIA developer member engagement in the NHP survey phase – particularly in Victoria and South Australia.
- Aim to achieve greater standardisation and congruence in the State by State NHP land supply and constraints analysis phase.
- Seek to better harmonise the timing of the State by State roll-out of NHP project methodology phases.

One of the most significant challenges encountered (once again) through the NHP 2025 program was accessing the most up-to-date and accurate data on land supply and development constraints in a consistent fashion across the nation. While there has been solid progress made in NHP 2025, there still remains various areas for greater national harmonisation – which has been noted throughout this Technical Report.

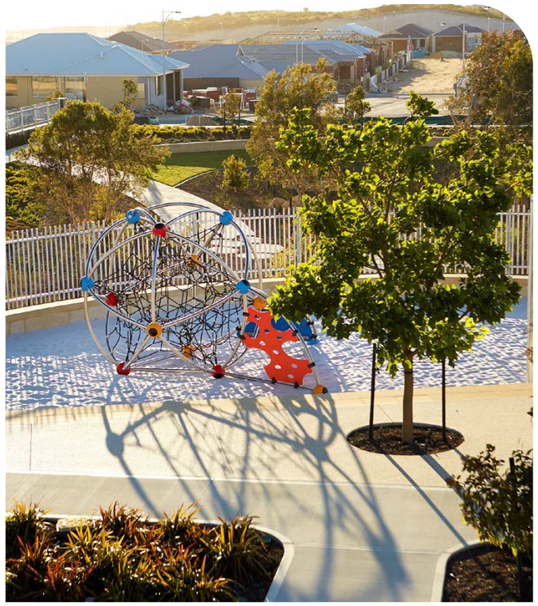
To adhere to appropriate probity and confidentiality conditions of submission, none of the UDIA developer provided supply information in the NHP survey is reported on at an individual site level. While the NHP reporting is informed by site-by-site intelligence, all reporting has been aggregated and presented at sub-regional and regional scales.

Despite a very significant uplift in NHP survey returns (see **Section 3**) in the 2025 program, UDIA notes that the Developer Intentions Survey results presented in this report, and in individual UDIA State Office NHP releases, do not claim to reflect 100% of the forward housing and multi-unit pipeline. The NHP 2025 Survey data has been carefully collated and presented as providing indicative/representative insights about the forward dwelling pipeline as informed by site-by-site intelligence from UDIA developer members – not a whole of market comprehensive snapshot assembly.

The NHP survey data does provide a strong evidence base to inform other UDIA research and policy projects and initiatives (including the UDIA NSW ***Building-Blocks,*** and the UDIA WA ***Growth Areas Infrastructure Requirements*** reporting) and informs the various recommendations put forward within this report, as well as helping inform the realistic shape of the forward five and ten year dwelling pipeline – by each NHP Reporting Region.

In order to increase the NHP's coverage of infill development site potential and realisation, UDIA partnered with Urbis for NHP 2025 who have provided built form intelligence and forecasting assistance (see **Section 4**).

In summary there has been significant improvements to the breadth and consistency to the data collation and analysis phases in NHP 2025, however there remains various arenas for incremental improvement/ refinement – as has been noted throughout this NHP 2025 Technical Report.



NHP 2025 Phase One
Land Supply & Development Constraints Mapping

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 consultants engaged for the NHP 2025 GIS mapping phase across the five reporting regions were;

- **MNG:** Sydney Mega-Region, Greater Melbourne & Geelong and Greater Perth
- **JFP:** South East Queensland
- **Alexander Symonds:** Greater Adelaide

An on-going challenge facing the NHP project (and these engaged consultants) has been the adoption of a nationally consistent approach for identification of undeveloped/vacant land stocks zoned for residential development, as well as potential future residential zoned lands designated for residential development.

Where possible the consultants have utlised publically available spatial data as core inputs, but in each case a significant amount of bespoke spatial techniques and analysis has been required to generate nationally consistent aggregations of land stocks and development constraints analysis.

Table 2 sets out the land use designations utlised across each NHP 2025 reporting region to assemble aggregate volumes of available zoned and potential future zoned land supply for residential development.

NHP Reporting Region	Land Use Categories Used for Aggregate Supply Analysis
Greater Sydney Mega-Region	Residential zoned land
South East Queensland	Urban Residential; Future Residential; Priority Development Areas
Greater Melbourne	Residential zoned land; Future Residential
Greater Perth	MRS Urban & Urban Deferred zoned land (LPS residential development zoned/R-Code designation); Urban Expansion; Urban Investigation designated land
Greater Adelaide	Development Ready Residential Land (0-2 years); Undeveloped Residential Land (2-5 years); Deferred Urban; Future Growth Areas

Table 2: Land use categories used for aggregate land stocks assembly

76,913 hectares

of total undeveloped residentially zoned land stocks (Aggregate).

46,260 hectares

of unconstrained undeveloped residential zoned land stocks (~1.06 Million new home capacity).

57%

of unconstrained undeveloped residential zoned land has environmental land use overlays which will sterilise or encumber forward development yields.

67,050 hectares

of total additional potential future residential land stocks.

30,660 hectares

of constrained undeveloped residential zoned Land Stocks (~714,585 new home capacity).

5.33 years

of available 'development ready' residential land supply residential land supply @ National Housing Accord annual dwelling target rate (~178,320)*.

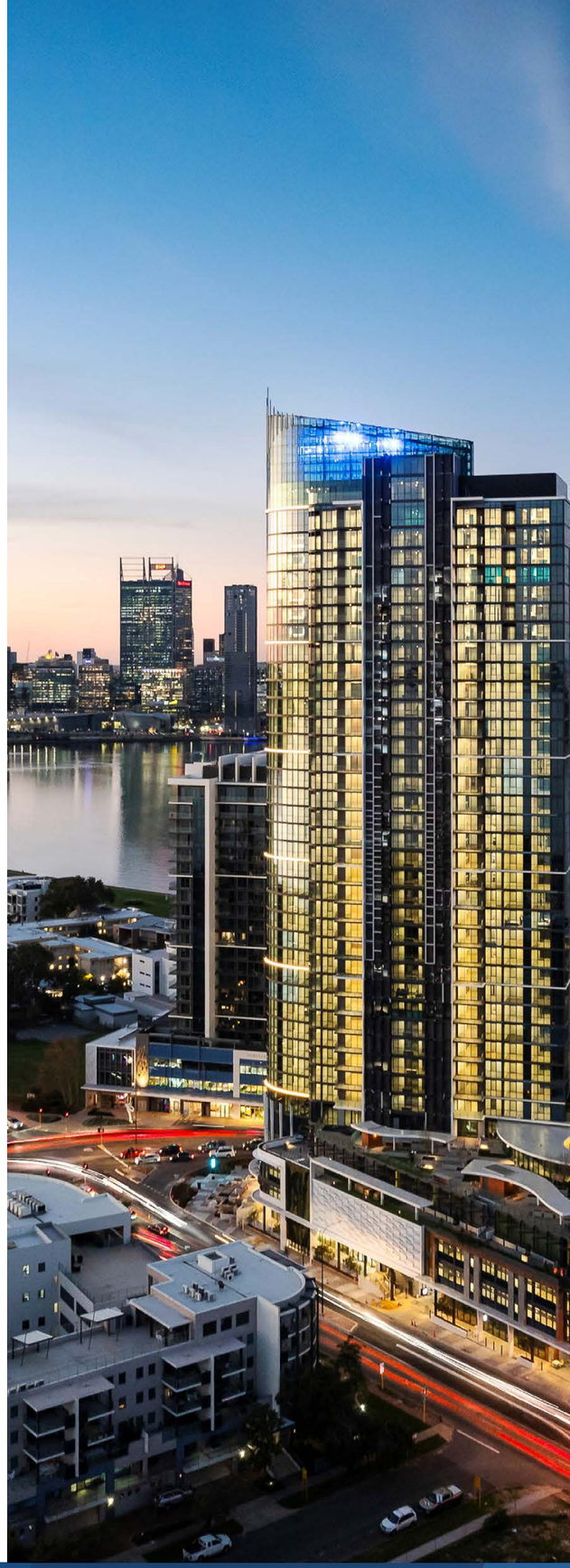


Figure 6: NHP 2025 - Combined Capital City Regions Land Supply Summary

NHP 2025 Phase One
Land Supply & Development Constraints Mapping

Undeveloped/Vacant Residential Zoned Land Assessment

In the absence of publicly accessible and up-to-date geospatial data setting out what appropriately zoned land parcels (for residential development) are undeveloped/vacant across each NHP reporting region, each commissioned consultant for the five NHP reporting regions undertook rigorous and nationally consistent geospatial processing techniques to provide baseline land supply estimates.

The NHP 2025 program marked the second year of the NHP national land supply assessment, which included some changes in assessment approach and consultants involved (see **Appendix 1**).

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.

At a general level, adjustments to the approach and assumptions for aggregate land supply inclusion for NHP 2025, means it is problematic to directly compare the outputs from the NHP Pilot in 2024. However the intent is for forward NHP reporting to remain as consistent as possible to facilitate year-on-year comparisons.

The headline insights from the NHP 2025 aggregate land supply 'audit' (prior to development constraints assessment) are:

- Greater Melbourne and Geelong holds the largest volume of both undeveloped residential zoned land and the largest stocks of potential future zoned land with a total of 45,385 hectares.
- The Greater Sydney Mega-Region recorded the second largest supply of undeveloped residential zoned land (17,640 hectares) but doesn't have a comparable category of potential future residential designated land to line-up with the other NHP reporting regions.
- In South East Queensland (SEQ) just over half (50.1%) of all identified land supply was located in Priority Development Areas (PDA) highlighting the importance of PDAs in facilitating efficient forward dwelling delivery.
- The combined total aggregate land supply identified in Greater Perth increased by 25% in the NHP 2025 assessment due to significant movements of land stocks between supply categories – especially in the SW and Peel Sub-Regions.
- Greater Adelaide recorded 7,857 hectares of undeveloped residential zoned land, which comprises 10% of the combined capital cities aggregate land supply. There was a further 16,018 hectares identified of 'potential future zoned land supply' which comprised 24% of this category of future supply nationally.

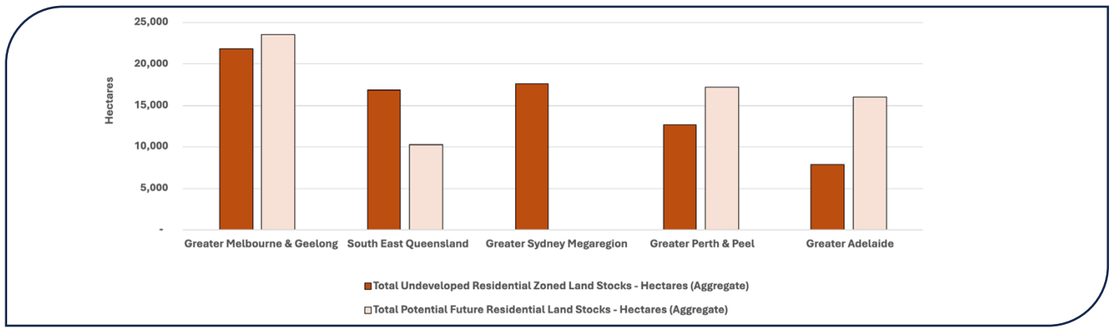
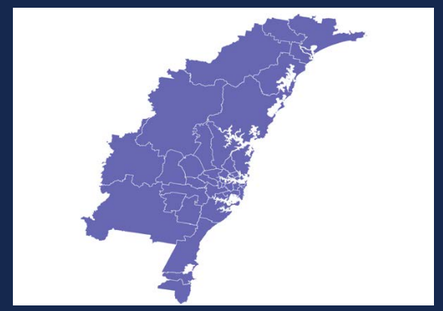


Figure 7: Aggregate Undeveloped Residential Zoned & Potential Future Residential Zoned Land Stocks (August 2025)

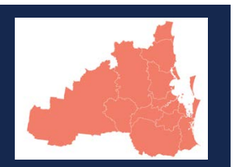
NHP 2025
Capital City Reporting Regions Land Supply Summary

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

Each of the commissioned consultants for NHP 2025 undertook a comprehensive analysis of development constraints impacting undeveloped residential zoned land and potential future residential zoned land across each of the five NHP Capital City reporting regions.

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 sterilise 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.

Appendix 1 sets out the full suite of finalised development constraint layers utilised in each jurisdiction's constraints mapping assessment.

Each development constraint was layered individually to allow for a clear picture of which particular constraint applied to each land parcel. In addition, a composite development constraints layer was also produced for both fundamental and additional constraint layers to produce core reporting outputs.

- *Greater Sydney Mega-Region* 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.

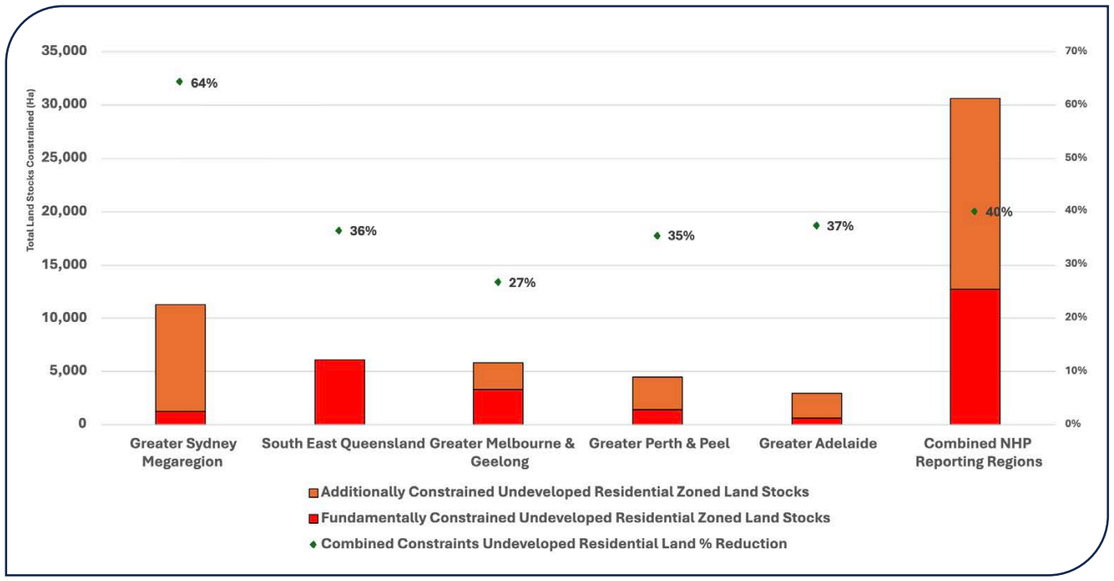


Figure 8: NHP 2025 Development Constriants Assessment Summary (August 2025)

NHP 2025 Phase One
Land Supply & Development Constraints Mapping

The multi-layered nature of the NHP development constraints mapping phase allows assessment of common residential development constraints at varying scales – from a suburb scale up to a Greater Capital City region scale. This granular level of data insight capability underscores the inherent power of the UDIA NHP program to inform key stakeholders on key issues which need addressing to bring forward dwelling supply yields.

Environmental constraints easily remain the largest development constraint identified across all five NHP reporting regions with a Combined Capital City average of 69% of all land sterilisation/encumbrance related to environmental features over undeveloped residentially zoned land. The types of environmental constraints which are included in the NHP 2025 assessment varies across reporting regions, and reflects locally specific land use designations and overlays. This includes 'Bush Forever' sites in Greater Perth, 'Koala Habitat' in SEQ, and 'Riparian Lands & Watercourses' in the Greater Sydney Mega-Region. (Refer to Appendix 1 for a full delimitation of NHP 2025 development constraint layers by region).

Figure 8 dictates that social infrastructure overlays appear to more of a development constraint in Sydney, Melbourne and Perth, than in SEQ and Adelaide. However, as per the comments above on environmental constraints, the types of 'social infrastructure' overlays varies considerably across the nation, and includes 'Future School Sites' in Greater Perth and 'Parks/Reserves/POS' in Greater Melbourne.

Accordingly, it is acknowledged that there are various challenges to presenting the NHP constraints mapping 'side-by-side' in the manner presented in Figure 8 below — due to the considerable variation in localised data availability and consistency. Accordingly, readers are directed to the more locally specific constraints reporting presented in the individual State chapters of this report.

However, the general types of land uses collated in the summary categories featured in Figure 8 are as follows:

- **Environmental Constraints** - includes high ecologically significant wetlands, creeks, waterways and floodways, biodiversity/ conservation corridors, threatened ecological habitat, etc.
- **Social Infrastructure Constraints** - includes reservations for future public open space, hospitals and school sites.
- **Transport Infrastructure** - primarily includes major road and rail corridor reservations.
- **Service Infrastructure** - includes high voltage power line easements and gas pipeline easements.
- **Other Infrastructure** - includes various types of 'public purpose' infrastructure including land reservations for desalination plants, character preservation areas, prisons and other special uses.

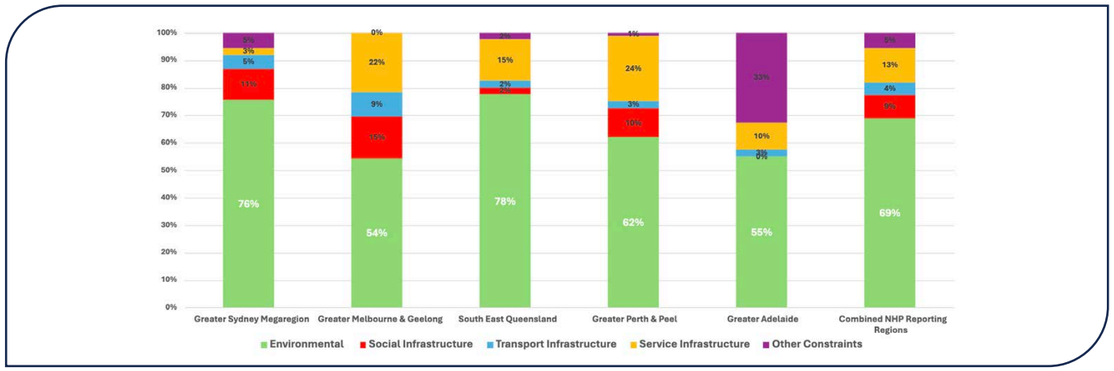


Figure 9: Proportion of Undeveloped Residential Land Identified as Constrained' by Constraint Category (Nov 2025)

NHP 2025 Phase Two **Developer Intentions Survey**

Overview

For the third consecutive year, UDIA has partnered with the Australian Urban Design Research Centre (AUDRC) at the University of Western Australia (UWA) for the further development and deployment of a bespoke NHP Developers Intentions Survey tool. The NHP Survey tool has been significantly improved and expanded for the NHP 2025 program, taking learnings and feedback received through the National Pilot deployment in NHP 2024.

The 2025 NHP survey drills deeper into project scale issues around enabling infrastructure requirements, development feasibility and environmental approvals. Certain insights from these new survey questions are presented in this years NHP Technical Report, while other insights are being utilised within other UDIA State Division driven projects, such as the UDIA NSW Building-Blocks, and the UDIA WA Infrastructure Requirements reporting and advocacy.

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.

This unique assembly of confidential developer landholding intelligence is unavailable through any other source in Australia and sets the UDIA National Housing Pipeline® project apart from any other land and dwelling supply reporting program/project in Australia.

The NHP Survey results provides grounded insights into:

1. The spatial distribution and areal extent of UDIA developer member* owned/controlled land holdings (in both greenfield release areas and within infill locations) across each capital city region.
2. The status of planning, development and environmental approvals.
3. The status of enabling infrastructure servicing.
4. The expected commencement of dwellings (by typology) on an annualised basis out ten years.

Due to the commercially sensitive nature of the developer landholding information collected through the NHP Survey phase, UDIA has implemented robust data confidentiality and data handling protocols to ensure developers' data remains secure and confidential, and survey data is only published in an aggregated manner.

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

NHP 2025 Phase Two **Developer Intentions Survey**

National Summary

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.

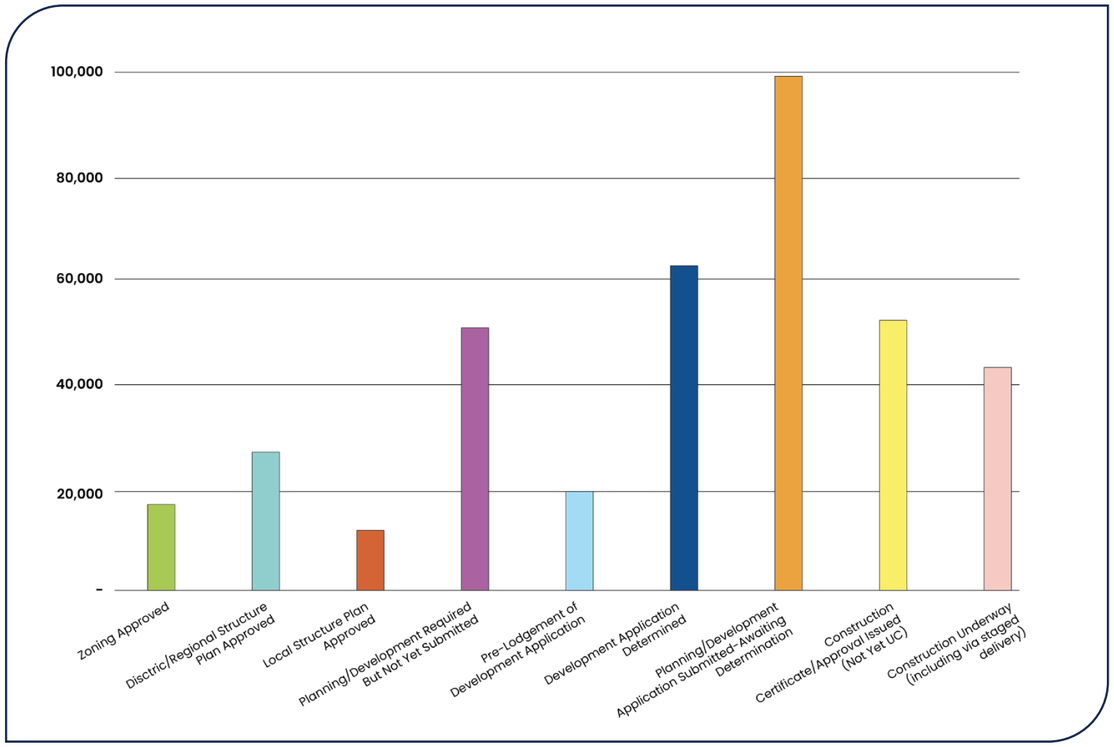


Figure 10: NHP 2025 Planning & Development Status of Forward Dwelling Yield (NHP 2025 Survey) Combined Capital City Regions

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

NHP 2025 Phase Two
Developers Intentions Survey

Enabling Infrastructure Summary

The NHP 2025 Survey sought deeper insights than the previous year from developers about each landholding's infrastructure requirements. In addition to understanding the current status of each category of infrastructure provision, the NHP 2025 Survey also asked questions around:

- Indicative timing required for infrastructure provision to enable development to proceed as per current project plans;
- Developer capacity to deliver infrastructure themselves – if it were permitted;
- Identity of the provider of the required infrastructure – if it were other than the main State based agency(i.e. Sydney Water, Water Corporation, etc).

The headline insights from the NHP 2025 infrastructure 'audit' are:

- ***33%*** of all Capital City NHP Survey yields require one or more types of enabling infrastructure funding commitment to progress to dwelling commencement status.
- ***Trunk 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.

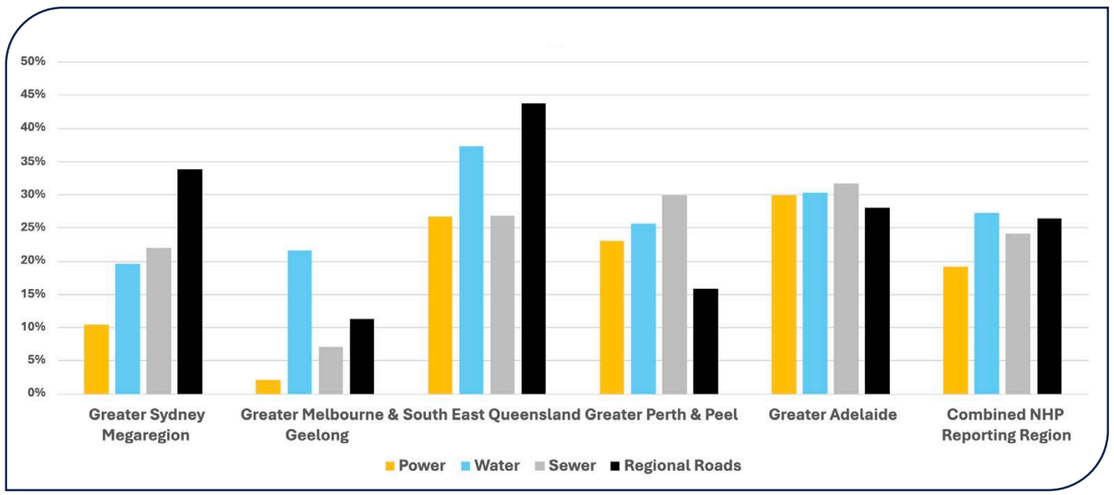


Figure 11: Proportion of NHP 2025 Detached House Survey Yield Requiring Enabling Infrastructure Funding/Commitment, by Type
*This UDIA estimation is calculated on the proportion of NHP Survey dwelling yield 'under risk' applied to a whole of market context

NHP 2025 Phase Two
Developers Intentions Survey

Environmental Approvals Summary

The NHP 2025 Survey sought deeper insights than the previous year from developers about each development site's Environmental Approval status and approval pathway.

The NHP 2025 Survey asked developers to specify whether State and/or Federal Government Environmental Approvals were required to proceed, and what the precise stage the approval was at - inclusive of whether an off-set plan was required and whether off-sets had been identified for any environmental removal/encroachment.

The headline insights from the NHP 2025 Environmental Approvals 'audit' are:

- ***28%*** of dwelling yield require Environmental Approvals to proceed (~107,000 dwellings).
- ***17%*** of dwelling yield requires Federal Government Environmental Approvals to proceed (~63,000 dwellings).
- ***15%*** of dwelling yield requires State Government Environmental Approvals to proceed (~58,000 dwellings).
- ***43%*** of dwelling yield requiring Federal or State Government Environmental Approval have an ***off-set plan requirement.***

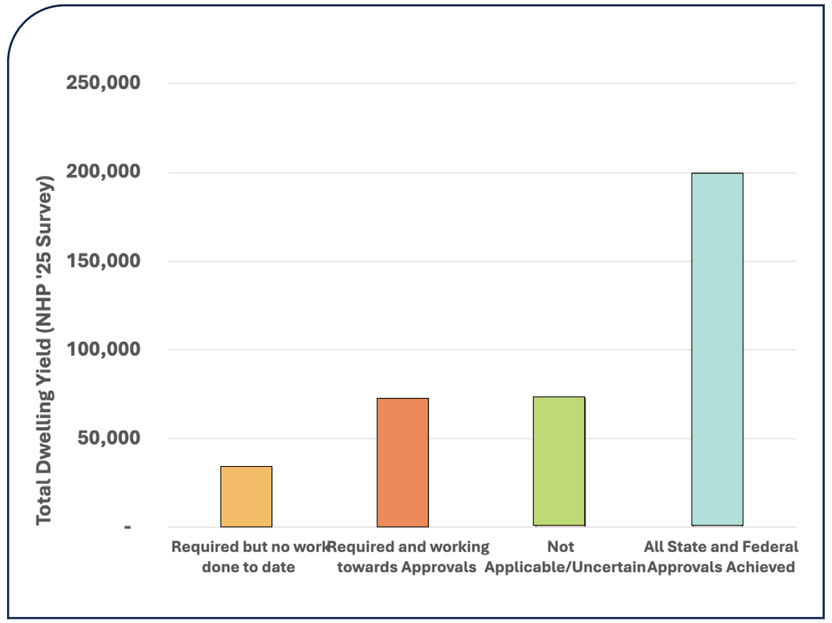


Figure 12: NHP 2025 Environmental/Biodiversity Approvals Status of Forward Dwelling Yield, Combined Capital City Regions

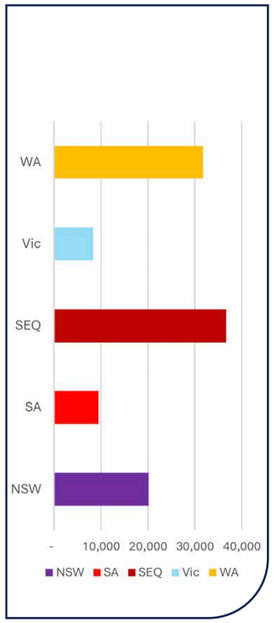


Figure 13: NHP 2025 Survey Dwelling Yield Requiring Environmental Approvals (State & Federal)

NHP 2025 Phase Three **Technical Workshops**

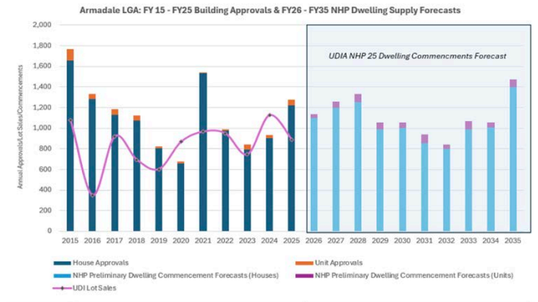
All UDIA State Divisions held NHP Technical Workshops across July to October 2025. This important NHP work phase was built off the NHP Pilot of 2024, and involves an assembly of development industry experts, drawn from a variety of backgrounds — including developers, planners, engineers, infrastructure providers, surveyors.

The explicit intent of the workshops is to robustly 'pressure test' the accuracy of the refreshed NHP land supply and constraints mapping; critique the latest NHP Developer Intentions Survey information; as well as assessing the various sources of additional supply intelligence assembled as core input data and insight informing the NHP 2025 preliminary greenfield and infill supply forecasts, across a ten-year residential development pipeline outlook to FY 2035.

The NHP Technical Workshops aim to provide a deliberative forum for testing and validating various NHP reporting metrics including:

- **Development Ready and Future Potential Residential Land Supply:** inclusions, assumptions & assessment
- **Development constraints:** fundamental & additional categories & local ground-truthing
- **Enabling infrastructure gaps:** shortfalls in trunk water, sewer, power & regional road provision
- **Planning & development approval blockages:** zoning, structure plans, development application, development contribution plans, construction certificates etc
- **Environmental approvals blockages:** State & Federal environmental/biodiversity approvals and off-set requirements & yield implications
- **Five and ten year dwelling completion forecasts:** by typology and by LGA/Sub-Region and Greater Capital City Scale
- **Dwelling Supply Forecasts versus State & National Housing targets:** low/medium/high completion scenarios, infrastructure contingent supply points, key growth node assumptions.

In the NHP 2025 program separate technical workshops were held for Greenfield/Growth Area LGAs, and Infill LGAs – with development sector experts with the relevant localised experience involved.



NHP 2025 Phase Three **Technical Workshops**

Infill Supply & Additional Dwelling Supply Intelligence

UDIA partnered with Urbis in the NHP 2025 program to expand the coverage and insight over infill development sites and precinct potential across all five NHP Capital City Reporting regions. The UDIA-Urbis NHP 2025 collaboration sought to expand the data and insight on supply points (capacity and feasible 10-year yields) and development constraints to delivering the available pipeline.

The heightened focus on Infill Supply in NHP 2025, was in response to review feedback from the NHP 2024 National Pilot, which indicated there was a broad perception that the NHP was greenfield land development focused and didn't have a strong enough lens of forward apartment and townhouse production across established urban areas.

Drawing from a variety of intelligence sources (see Figure 14) Urbis undertook a rigorous process to allocate all substantive infill development sites & precincts (20+ dwellings) across each NHP reporting region's LGAs into a NHP 'tier' based on the following:

i. **Tier One:** dwelling commencement expected within 0-2 years (i.e. 2026 – 2028)

ii. **Tier Two:** dwelling commencement likely 3-5 years (i.e. 2029-2031)

iii. **Tier Three:** dwelling commencement possible 6-10 years (i.e. 2032-2035)

iv. **Tier Four:** dwelling commencement possible 1+ years (2036 onwards)

The preliminary infill supply forecasts and assumptions were tested and debated through the NHP Technical Workshop phase, which helped inform the finalised short, medium and longer term multi-unit forecasts developed for this years NHP reporting.

A core point of deliberation was around the likely speed of a tun-around in new multi-unit production – with the sector bedevilled by an on-going chronic under supply delivery profile due to a perfect storm of development feasibility & construction input cost pressures. The annual update cycle of NHP reporting, means the LGA scale infill capacity and 'feasible' deliverable infill supply forecasts can be appropriately nuanced based on contemporary market dynamics.

In addition to the NHP land supply & survey intelligence and the Urbis curated infill forecast developed for each NHP reporting region, the final NHP five-year modelling and forecasts also take into account current and decade long trends in the following property datasets:

1. Small area dwelling approvals (houses and units) Source: Australian Bureau of Statistics
2. Capital City Scale dwelling completions (houses and units – Net derived) Source: Australian Bureau of Statistics; UDIA
3. New settled dwelling sales (houses & units) Source: Cotality

NHP 2025
Infill Supply Methodology

URBIS

Where data overlaps, the data from the higher order is taken.

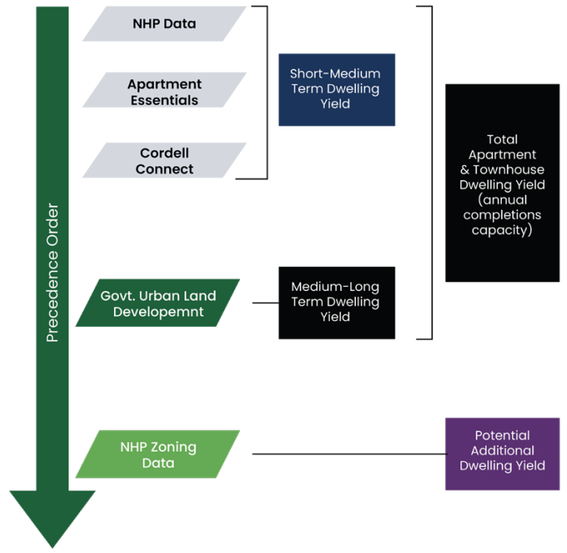


Figure 14: NHP 2025 Infill Supply Methodology

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, based on core NHP data in addition to additional supply intelligence*, in the State chapter summaries following. 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 15 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.

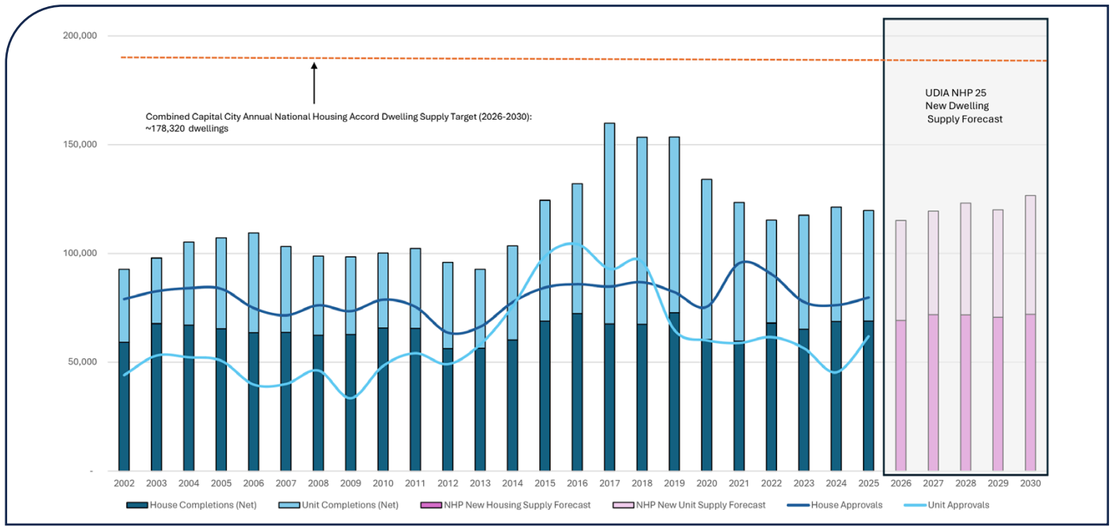


Figure 15: Combined NHP Capital City Region Dwelling Completions, Approvals & Aggregate NHP Dwelling Supply Forecast (FY)

Figure 16: NHP 2025 Cumulative Dwelling Supply Forecast v Cumulative Annual Housing Accord Dwelling Target

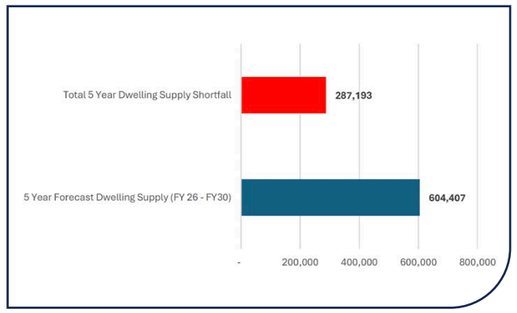


Figure 17: NHP 2025 Combined Capital City Dwelling Shortfall & Forecast Supply (FY26 - FY30)

*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.

Sydney Mega-Region

Land Supply & Development Constraints Summary

- As at ***August 2025*** there was an estimated ***17,640 hectares*** of total aggregate vacant/undeveloped residential zoned land distributed across the Sydney Mega-Region. This is second largest zoned supply quantum of aggregate zoned supply after Greater Melbourne & Geelong (~21,815 hectares).
- ***64% (11,315 hectares)*** of this undeveloped residential zoned land is constrained by one or more development constraint overlays, reducing the headline volume of unconstrained zoned residential land across the Sydney Mega-Region to 6,328 hectares, with a total theoretical dwelling capacity of over ***284,800 dwellings****.
- The Central Sydney (City) sub-region (including Blacktown, Cumberland, Parramatta, Hills Shire LGAs) holds the largest stocks of unconstrained zoned land with a theoretical yield potential of ~66k dwellings), with ~36k home sites potentially at delivery risk due to a variety of fundamental and additional constraints.
- Environmental constraints (including floodways, waterways & biodiversity/conservation designations) collectively account for 76% of Greater Sydney's development constraint overlay on undeveloped residential zoned land.
- Refer to **Appendix 1** for a full breakdown of development constraints utilised in the NHP 2025 land supply assessment for the Sydney Mega-Region.

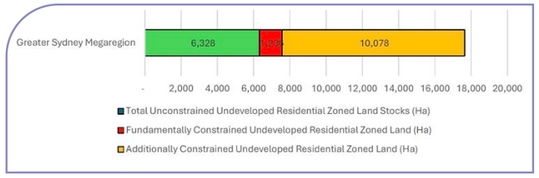


Figure 18: Aggregate Land Supply & Development Constraints on Undeveloped Urban Zoned Land (Aug. 2025)

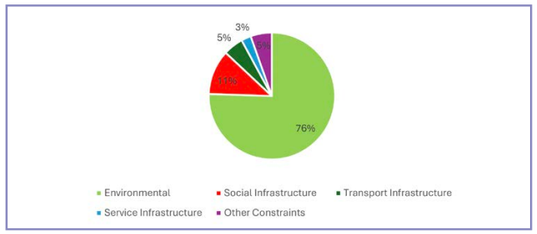


Figure 19: NHP 2025 Sydney Mega-Region, % Vacant Zoned Residential Land Constrained by Type

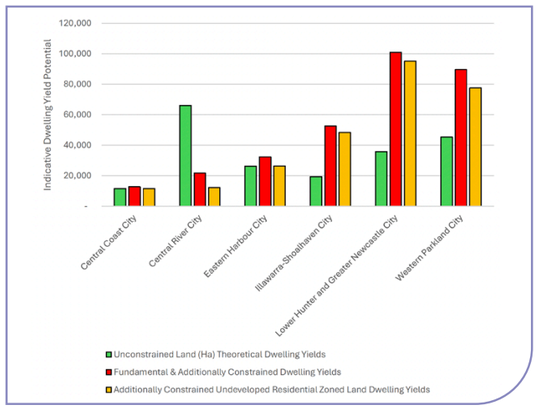


Figure 20: NHP 2025 Land Constraints Assessment, Sydney Mega-Region: Indicative Dwelling Yield Potential*

NHP 2025 – Greater Sydney Megaregion	Total Land Stocks (Hectares)	Total Indicative Residential Yield Estimate
Undeveloped Residential Zoned Land Stocks, **Unconstrained** (Aug. 2025)	6,328 Ha	284,760 Dwells
Undeveloped Residential Zoned Land Stocks, **Constrained** (Aug. 2025)	11,314 Ha	395,990 Dwells
Environmental **Constraints** Overlay on Undeveloped Residential Zoned Land Stocks (Aug. 2025)	8,727 Ha	305,400 Dwells

4.89 years

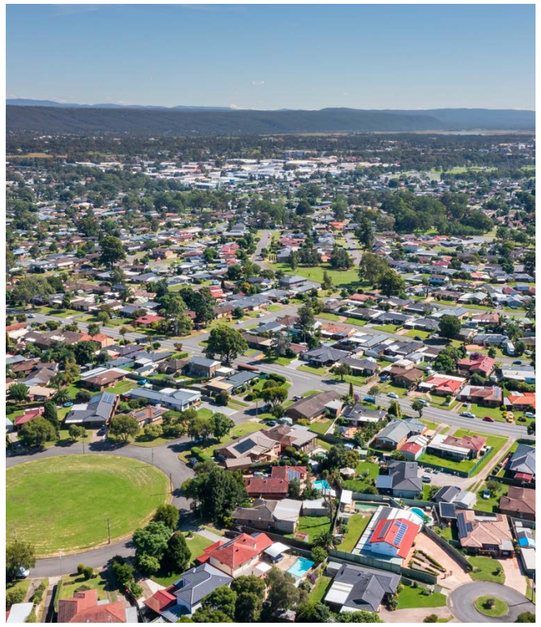
of unconstrained residential land supply at National Housing Accord annual dwelling target take-up rate(~58k)

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

Sydney Mega-Region

Developer Intentions Survey Summary

- There was a total of 81,700 forward pipeline dwellings covered in the NHP 2025 Survey phase across the Sydney Mega-Region – the second largest volume of survey yield captured across the NHP reporting regions (after Greater Perth).
- Around 33% of forward pipeline requires rezoning, 58% is awaiting a development application and/or planning proposal determination, and a further 13% of yield is still awaiting submission of a planning or development proposal.
- Regional Road funding or commitment is the largest 'at risk' component of the forward pipeline with 34% (~16,300 detached dwellings), followed by trunk sewer with 22% of surveyed yields.



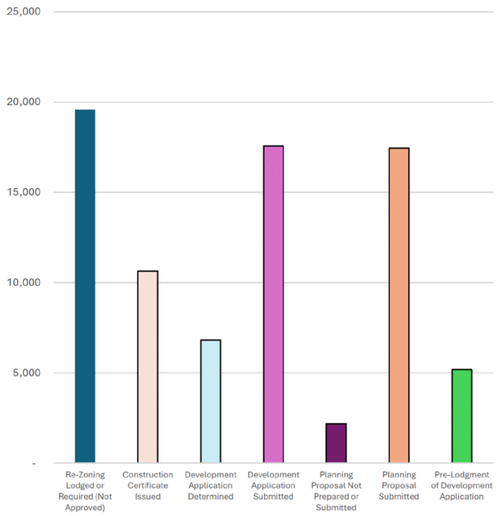


Figure 21: NHP 2025, Detached House & Townhouse Dwelling Yields by Planning & Development Stage (Sydney Mega-Region)

33%
forward pipeline needs re-zoning

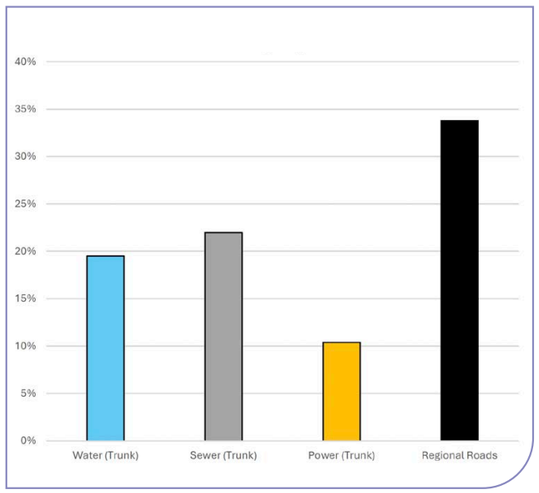


Figure 22: NHP 2025, Proportion of NHP Survey Yields Requiring Enabling Infrastructure Commitment/Funding (Sydney Mega-Region)

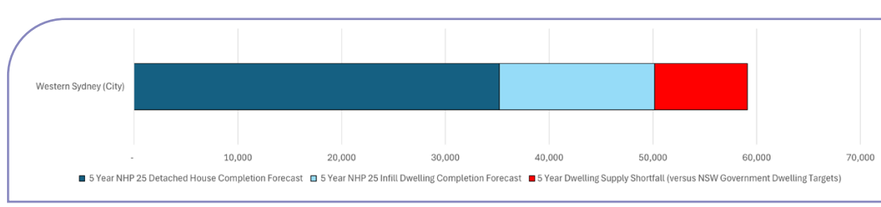
Sydney Mega-Region

Sub-Region Supply Outlook

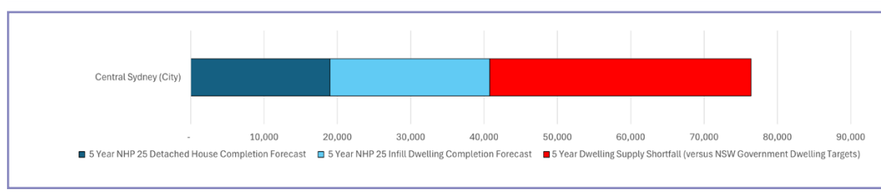
- UDIA's dwelling supply forecasts for FY26 to FY30 highlights significant dwelling shortfalls against NSW Dwelling targets for all sub-regions, highlighted by Eastern Sydney (City) where just 29% of the five-year target is currently forecast to be achieved. Infill completions are only tracking around one quarter of current target requirements.
- Greenfield production is forecast to better match-up to targets, led by strong supply delivery in the Western Sydney (City) & Illawarra-Shoalhaven regions assuming infrastructure and planning constraints are resolved. Strong greenfield production is forecast for the Lower Hunter and Central Coast, but soft mutli-unit supply drives the resultant 66% below (15,460 dwellings) the five-year target for the sub-region.

Sub-Regional Dwelling Supply Snapshot

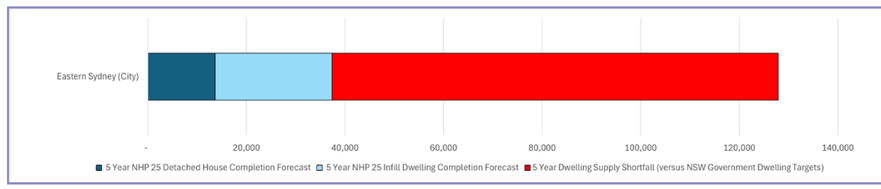
NHP 25 Dwelling Supply Forecast v Dwelling Target: 5 Year Yield Position



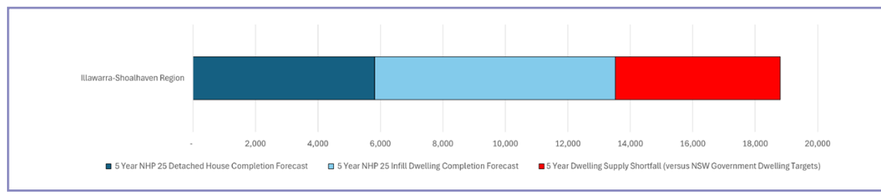
-15%
8,940 Dwellings
Below Target



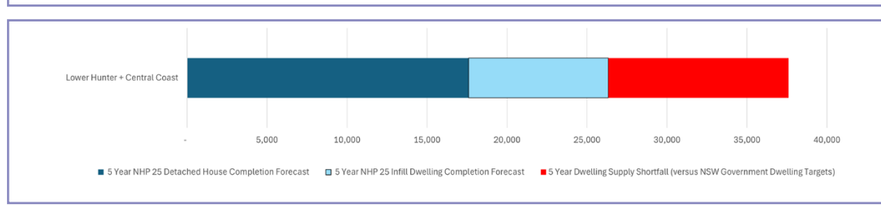
-47%
35,610 Dwellings
Below Target



-71%
90,550 Dwellings
Below Target



-28%
5,280 Dwellings
Below Target



-66%
15,460 Dwellings
Below Target

Sydney Mega-Region

NHP 2025 Forecast versus Five-Year Housing Target

- The NSW Government's annualised dwelling production target totals 64,400 new homes per annum across the Sydney Mega-Region. The annual dwelling target is adjusted to 58,180 when calculated for a national population-weighted share of the National Housing Accord target of 1.2 million new houses over five years.
- The NHP 2025 analysis indicates that there will be a substantial dwelling production shortfall across the NHP reporting region over the coming five years to FY 2030. The combined dwelling supply shortfall is estimated to be 148,000 dwellings against the NSW Government derived target, and 117,000 against the National Housing Accord (the Accord) based target*.
- The forward supply potential of new housing from greenfield release areas and across the established urban footprint has firmed modestly over the last twelve months, as has the prospects for infill housing (including both apartments and townhouses) on the back of improving development feasibilities – for projects in certain locations.

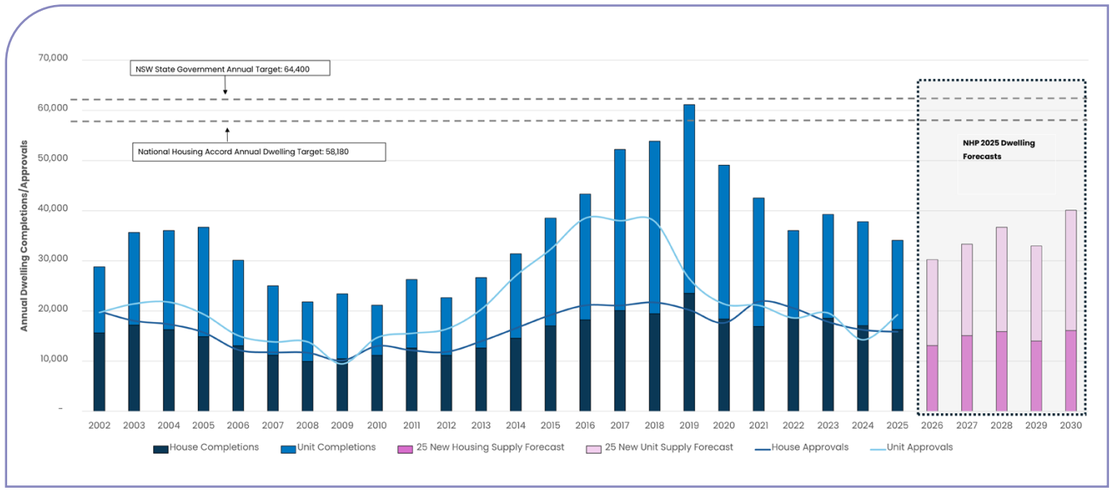


Figure 23: NHP 2025: Greater Sydney Mega-Region, Annual Dwelling Completions (Net), Approvals & NHP 2025 Dwelling Supply Forecast (FY)

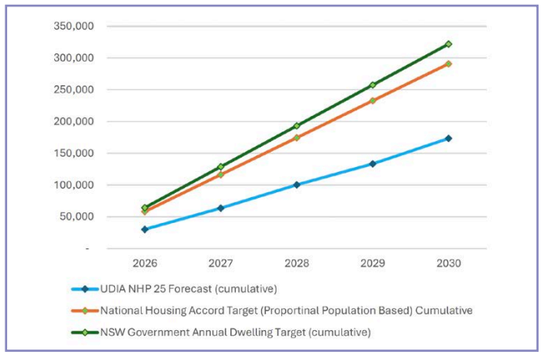


Figure 24: NHP 2025: Sydney Mega-Region - Cumulative Dwelling Supply Forecast V National Housing Accord Target

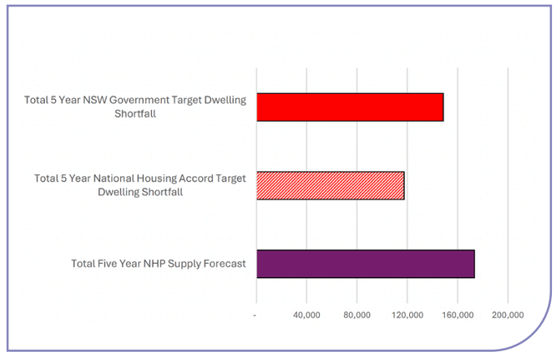


Figure 25: NHP 2025: Sydney Mega-Region - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

*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.

Sydney Mega-Region

Policy Recommendations

Based on the NHP 2025 analysis, UDIA NSW provides the following recommendations:

1. **Unlock Housing Enabling Infrastructure**

- Make greater direct Government investment in housing enabling infrastructure.
- Bring forward payment of Commonwealth Housing Accord incentives payments to fund housing enabling infrastructure.
- Establish an Infrastructure Acceleration Seed Fund to enable the earlier delivery of local and state infrastructure .

2. **Support measures to improve project feasibility**

- Update apartment design rules to reflect modern ways of living and current economic conditions.
- Freeze any increases in state development contributions rates for the life of the Accord period.
- Defer timing of payment of state and local development contributions to the relevant last stage of development (Occupation Certificate or Subdivision Certificate).

3. **Remove green tape and modernise biodiversity planning**

- Fund more large scale Strategic Conservation Plans like the Cumberland Plain Conservation Plan across identified housing and employment growth regions including in the Illawarra, Shoalhaven, Central Coast and Lower Hunter regions.
- Enshrine an "avoid once" principle in biodiversity assessments and improve the standard bio-certification process.
- Commit to a permanent extension of the Sydney Growth Centres bio-certification.

4. **Make houses a focus of housing supply**

- Commit to supporting detached housing delivery to at least previous peak levels.
- Housing as a forerunner for density - support greater density outcomes in established greenfield growth areas in line with UDIA Greenfield 2.0 recommendations.

South East Queensland

Land Supply & Development Constraints Summary

- As at ***August 2025*** there was an estimated ***16,895 hectares*** of total aggregate vacant/undeveloped residential zoned land distributed South East Queensland.
- There was an additional ***10,285 hectares*** identified as potential future residential land across SEQ – which are not examined as part of NHP 2025 analysis or pipeline forecasting.
- ***36%*** (6,125Ha) of undeveloped residential zoned land is constrained by one or more development constraint overlays, reducing the headline volume of unconstrained zoned residential land across the SEQ NHP Region to ***10,770***, with a total theoretical dwelling capacity of over ***212,815 dwellings****.
- Logan City LGA holds the largest stocks of unconstrained zoned land and the largest stocks of constrained land with ~80,000 home sites potentially at delivery risk due to a variety of fundamental and additional constraints.
- Environmental constraints (Koala habitat, floodways and waterways) collectively account for 78% of NHP development constraint overlay on undeveloped residential zoned land across SEQ.
- Refer to Appendix 1 for a full breakdown of development constraints utilised in the NHP 2025 land supply assessment for South East Queensland.

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

Figure 26: Aggregate Land Supply & Development Constraints on Undeveloped Urban Zoned Land (Aug 2025)

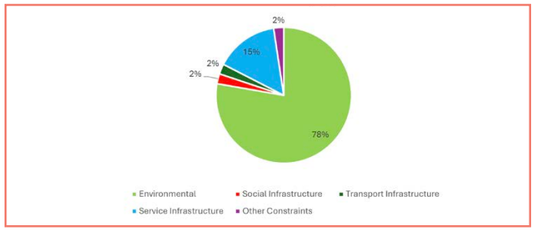


Figure 27: NHP 2025 SEQ % Undeveloped Residential Zoned Land Constrained by Type

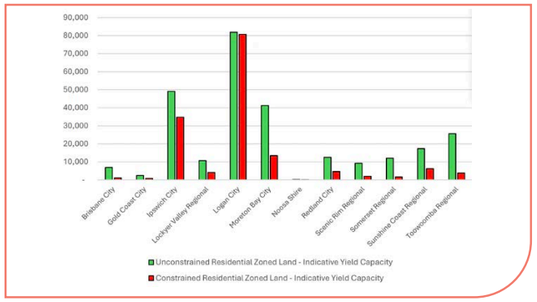


Figure 28: NHP 2025 SEQ LGAs: Indicative Dwelling yield Implications at 25 Dwellings Per Hectare

NHP 2025 – South East Queensland	Total Land Stocks (Hectares)	Total Indicative Residential Yield
Undeveloped Residential Zoned Land Stocks, **Unconstrained** (Aug. 2025)	10,770 Ha	212,810 Dwells
Undeveloped Residential Zoned Land Stocks, **Constrained** (Aug. 2025)	6,124 Ha	153,100 Dwells
Environmental **Constraints** Overlay on Undeveloped Residential Zoned Land Stocks (Aug. 2025)	4,287 Ha*	107,000 Dwells

5.85 years

of unconstrained residential land supply at National Housing Accord annual dwelling target take-up rate (~36k)

South East Queensland

Developer Intentions Survey Summary

- There was a robust 38% increase in the coverage of the SEQ forward dwelling pipeline in the NHP 2025 developer survey with a total of 78,000 residential yield captured – across both detached house and multi-unit stock.
- Around 19% of forward pipeline requires rezoning, 30% is awaiting a development application and/or planning proposal determination, and a further 23% of yield is still awaiting submission of a planning proposal.
- Regional Road funding/commitment has the largest amount of forward dwelling yield reliant on delivery (44%), however Trunk water funding or commitment is considered the largest 'at risk' component of the forward pipeline in term of enabling infrastructure, with 37% (~31,280 detached dwellings) of surveyed yields facing funding uncertainty.
- In total, SEQ has the highest proportion (44%) of forward dwelling pipeline 'at risk' for enabling infrastructure requirements across the NHP 2025 reporting regions.

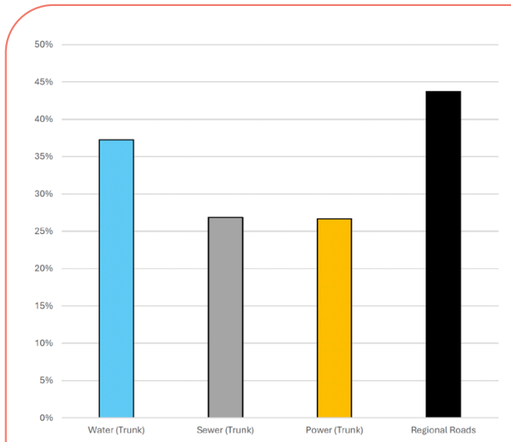


Figure 29: NHP 2025 Proportion of NHP Survey Yields Requiring Enabling Infrastructure Commitment/Funding (SEQ)

37%

forward pipeline at risk - water (Trunk Water Infrastructure)

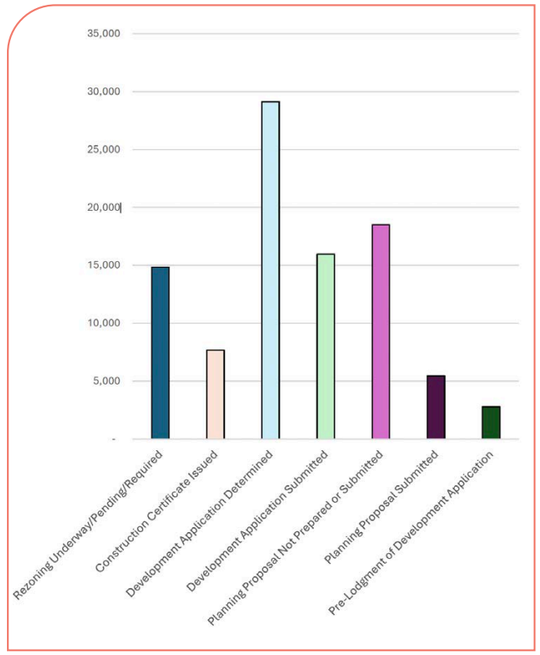


Figure 30: NHP 2025 SEQ Total Survey Dwelling Yields by Planning & Development Status (Aug 2025)

South East Queensland

NHP 2025 Forecast versus Five Year Housing Target

- The ShapingSEQ Plan has an annualised new dwelling supply target of 36,180 across the FY26 to FY30 forward period. The annual dwelling target is very similar for SEQ (36,360) when calculated for a population weighted share of the National Housing Accord target of 1.2 million new houses over five years.
- The NHP 2025 analysis indicates that despite an uptick in aggregate forecast production from NHP 2024 forecasting, there will still be a substantial dwelling production shortfall across the SEQ reporting region over the coming five years to FY30. The combined dwelling supply shortfall is estimated to be around 68,000 dwellings, with the year-on-year supply shortfall averaging 37% below of the annual target*.
- The forward supply potential of new infill dwellings remains soft due to challenging feasibility equations for developers, which weighs down aggregate new dwelling production. Detached house delivery from across greenfield release areas and from within the existing urban footprint is expected to remain around the decade average over the forward five year period.

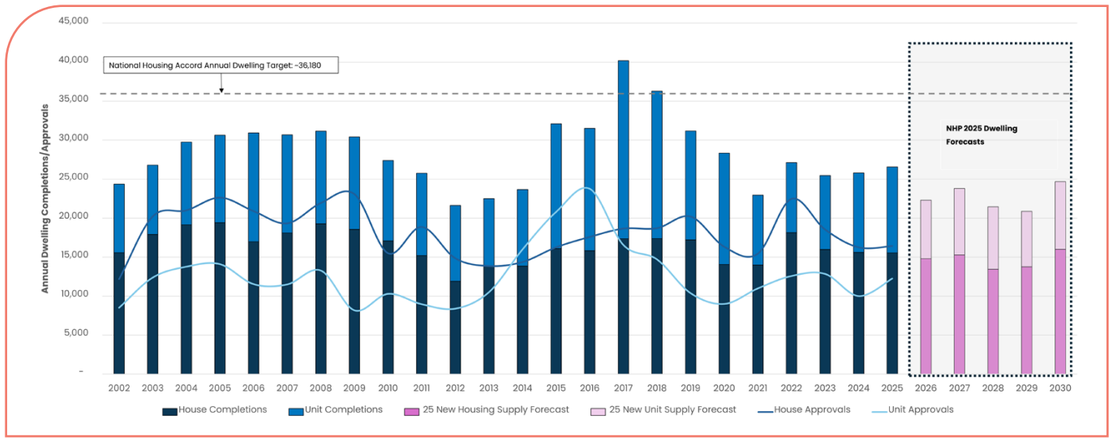


Figure 31: NHP 2025: SEQ, Annual Dwelling Completions (Net), Approvals & NHP 2025 Dwelling Supply Forecast (FY)

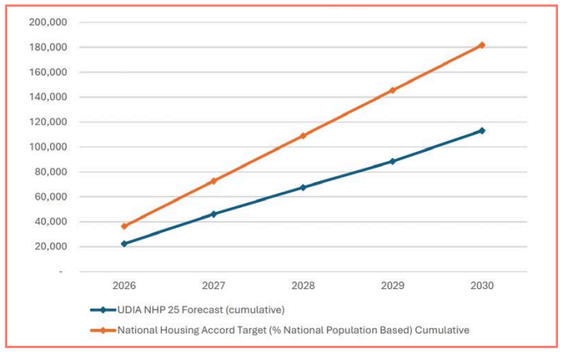


Figure 32: NHP 2025: SEQ - Cumulative Dwelling Supply Forecast V National Housing Accord Target

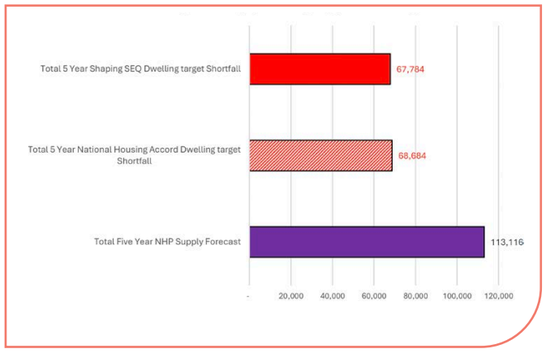


Figure 33: NHP 2025: SEQ - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

*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.

South East Queensland

Policy Recommendations

Based on the NHP 2025 analysis, UDIA QLD provides the following recommendations across two major themes:

1. Develop and add more 'supply boosting' rezoning options including:

1.1. To ensure land within the urban footprint is development ready, set Local Government Area (LGA) rezoning targets and, drive delivery through a Growth Area Authority.

1.2. Work with Local Governments to masterplan all urban footprint Rural Living and Emerging Community areas including by proponent led pathways or State model.

1.3. Require LGAs to rezone all land within two years of the release of the Regional Plan.

2. Plan for future supply

2.1. Identify new growth areas outside Urban Footprint as Future Growth Areas.

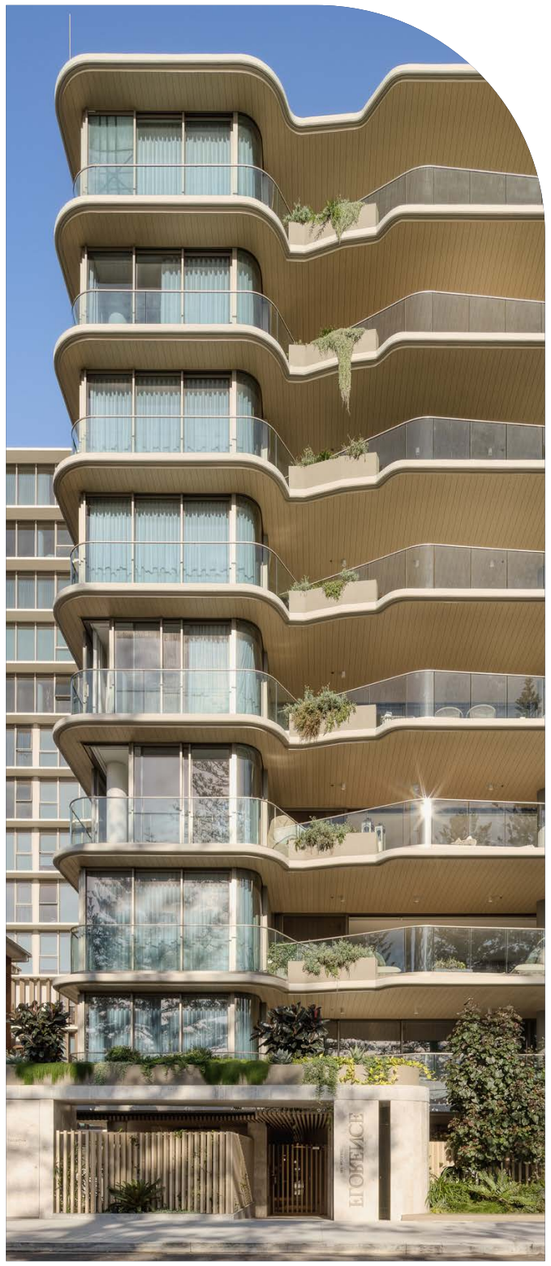
2.2. Review all Rural Areas to identify suitability for urban purposes and remove prohibition on sub-divisions.

2.3. Make the hard line of the urban footprint more flexible removing prohibition on applications outside the footprint.

2.4. Create a proponent led pathway for applications outside the urban footprint to be able to be lodged, when accompanied by an infrastructure funding and delivery plan.

2.5. Require LGAs to include all Urban Footprint lands to have infrastructure plans in place.

2.6. Fast track upzone urban foot print land.



Greater Melbourne

Land Supply & Development Constraints Summary

- As at ***August 2025*** there was an estimated ***21,815 hectares*** of total aggregate vacant/undeveloped residential zoned land distributed across the Greater Melbourne & Geelong region. This is largest zoned supply (aggregate) of any NHP 2025 reporting region; 23% more than the Greater Sydney Mega-Region, and 29% more than South East Queensland.
- ***27%*** (5,790 hectares) of this undeveloped residential zoned land is ***constrained*** by one or more development constraint overlays, reducing the headline volume of unconstrained zoned residential land across the Greater Melbourne & Geelong NHP Region to ***16,025 hectares***, with a total theoretical dwelling capacity of over over ***311,000 dwellings****.
- The ***Northern Region*** holds the largest stocks of unconstrained zoned land and the largest stocks of constrained land with ~120,000 home sites potentially at delivery risk due to a variety of fundamental and additional constraints.
- Environmental constraints (including floodways, waterways & biodiversity/conservation designations) collectively account for 54% of NHP development constraint overlay on undeveloped residential zoned land.
- Refer to **Appendix 1** for a full breakdown of development constraints utilised in the NHP 2025 land supply assessment for Greater Melbourne & Geelong.

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

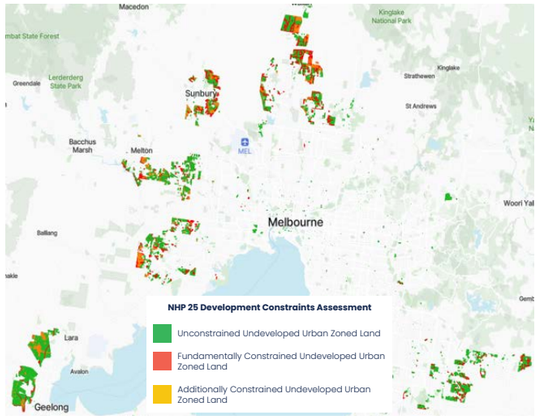


Figure 34: Aggregate Land Supply & Development Constraints on Undeveloped Urban Zoned Land (Aug 2025)

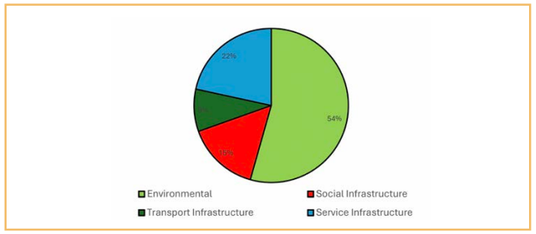


Figure 35: NHP 2025 Greater Melbourne & Geelong, Constrained Undeveloped Residential Zoned Land (Ha) by Constraint Type

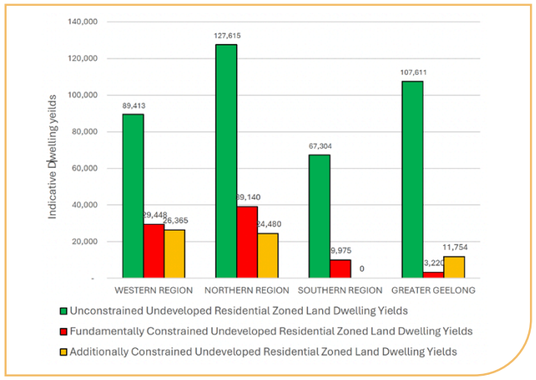


Figure 36: NHP 2025 Greater Melbourne & Geelong Growth Corridors: Indicative Dwelling yield Implications @25 Dwellings Per Hectare

NHP 2025 – Greater Melbourne & Geelong	Total Land Stocks (Hectares)	Total Indicative Residential Yield
Undeveloped Residential Zoned Land Stocks, **Unconstrained** (Aug. 2025)	16,025 Ha	~311,700 dwellings
Undeveloped Residential Zoned Land Stocks, **Constrained** (Aug. 2025)	5,790 Ha	~145,000 dwellings
Environmental **Constraints** Overlay on Undeveloped Residential Zoned Land Stocks (Aug. 2025)	3,149 Ha	~79,000 dwellings

6.26 years

of unconstrained residential land supply @ National Housing Accord annual dwelling target take-up rate (~50k)

Greater Melbourne

Developer Intentions Survey Summary

- There was a four-fold increase in dwelling pipeline volumes covered in the NHP 2025 Survey phase, with a total of ***62,550*** dwellings captured across Greater Melbourne & Geelong.
- Around 33% of forward pipeline requires rezoning, 25% is awaiting a development application and/or planning proposal determination, and a further 18% of yield is still awaiting submission of a planning proposal.
- Trunk water funding or commitment is the largest 'at risk' component of the forward pipeline with 22% (~14,000 detached dwellings), followed by regional roads with 11% of surveyed yields. These enabling infrastructure requirements are the lowest 'at risk' across the NHP 2025 reporting regions.

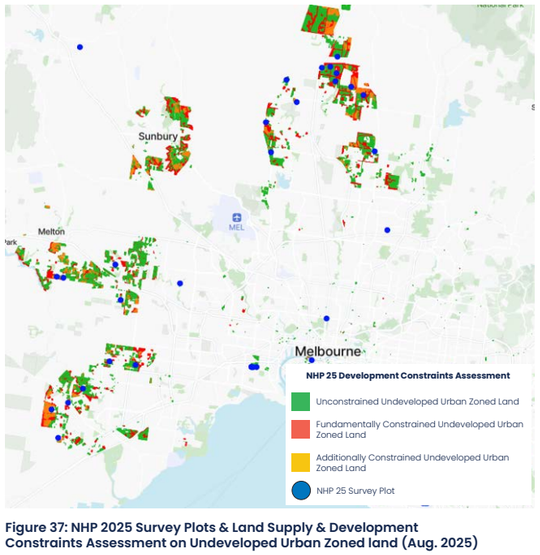


Figure 37: NHP 2025 Survey Plots & Land Supply & Development Constraints Assessment on Undeveloped Urban Zoned land (Aug. 2025)

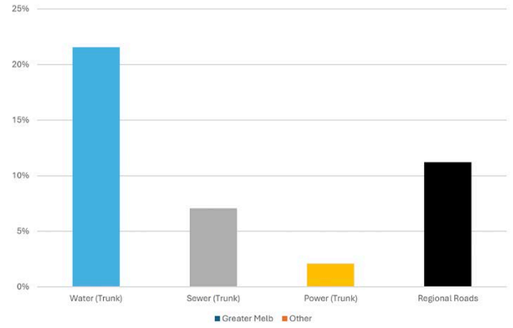


Figure 38: NHP 2025, Proportion of NHP Survey Yields Requiring Enabling Infrastructure Commitment/Funding (Greater Melbourne & Geelong)

22%
forward pipeline at risk - water
(Trunk Water Infrastructure)

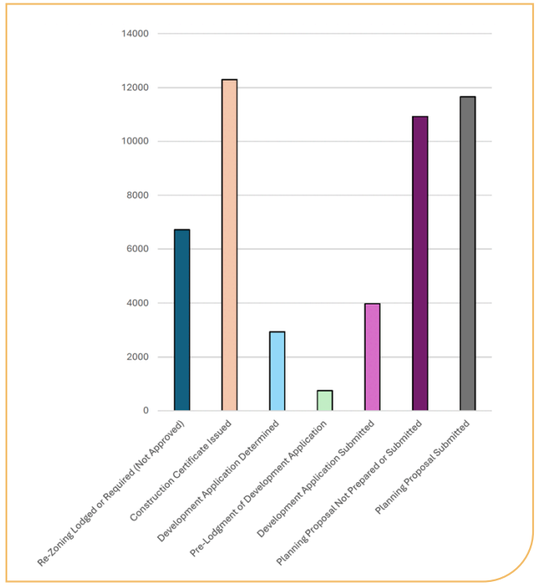


Figure 39: NHP 2025, Survey Yields by Planning & Development Stage

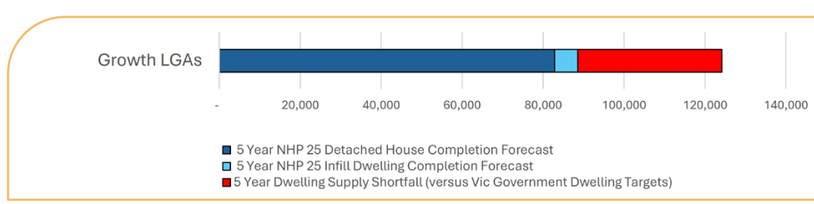
Greater Melbourne

Sub-Region Supply Outlook

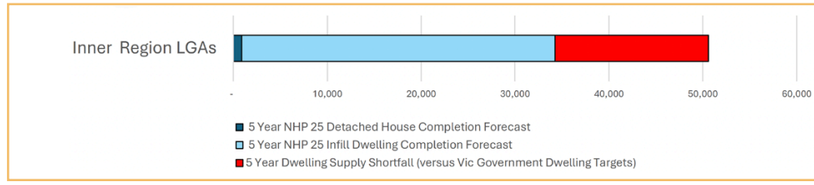
- UDIA's dwelling supply forecasts for FY26 to FY30 highlights significant dwelling shortfalls against Victorian Dwelling Targets for all sub-regions, highlighted by Eastern Sydney (City) where just 29% of the five-year target is currently forecast to be achieved. Infill completions are only tracking around one quarter of current target requirements.
- Greenfield production is forecast to better match-up to targets, led by strong supply delivery in the Western Sydney (City) & Illawarra-Shoalhaven regions. Strong greenfield production is forecast for the Lower Hunter and Central Coast, but soft mutli-unit supply drives the resultant 66% below (15,460 dwellings) the five-year target for the sub-region.

Sub-Regional Dwelling Supply Snapshot

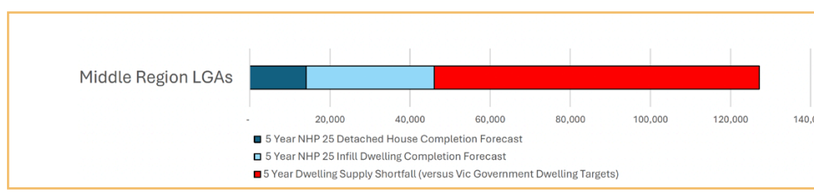
NHP 25 Dwelling Supply Forecast v Dwelling Target: 5 Year Yield Position



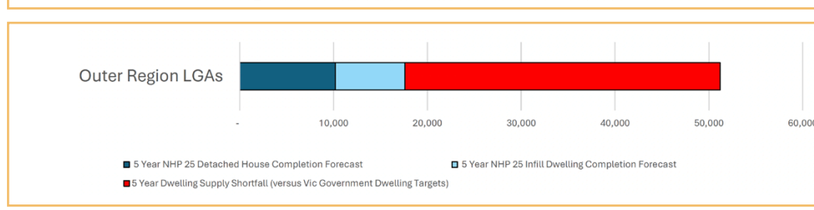
-26%
32,500 Dwellings
Below Target



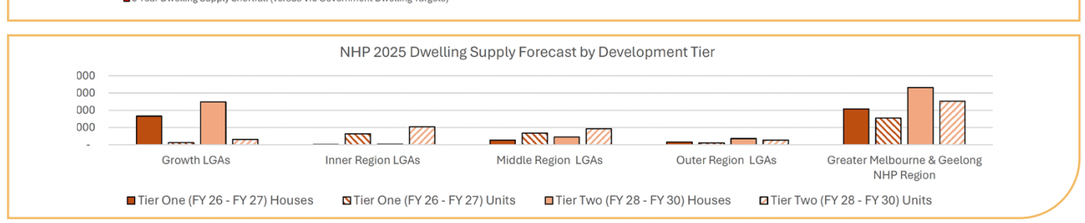
-31%
15,460 Dwellings
Below Target



-64%
81,079 Dwellings
Below Target



-66%
33,590 Dwellings
Below Target



Greater Melbourne

NHP 2025 Forecast versus Five Year Housing Target

- The latest Victorian State Government dwelling supply targets across the LGAs of Greater Melbourne & Greater Geelong totals 70,685 dwellings per annum across the FY26 to FY30 forward period.
- The NHP 2025 analysis indicates that despite an uptick in aggregate forecast production from NHP 2024, there will still be a substantial dwelling production shortfall across the NHP reporting region over the coming five years to FY30. The combined dwelling supply shortfall is estimated to be around 165,850 dwellings, with the year-on-year supply shortfall averaging around just half of the annual target.
- The National Housing Accord population based dwelling target rate for Greater Melbourne and Geelong is 49,780 new homes per annum. The combined dwelling supply shortfall over the coming five years against this alternative target is 61,520.
- The forward supply potential of new housing from greenfield release areas and across the established urban footprint has firmed over the last twelve months, as has the prospects for infill housing (including both apartments and townhouses) on the back of modest improvements in development feasibilities for certain projects in certain locations.

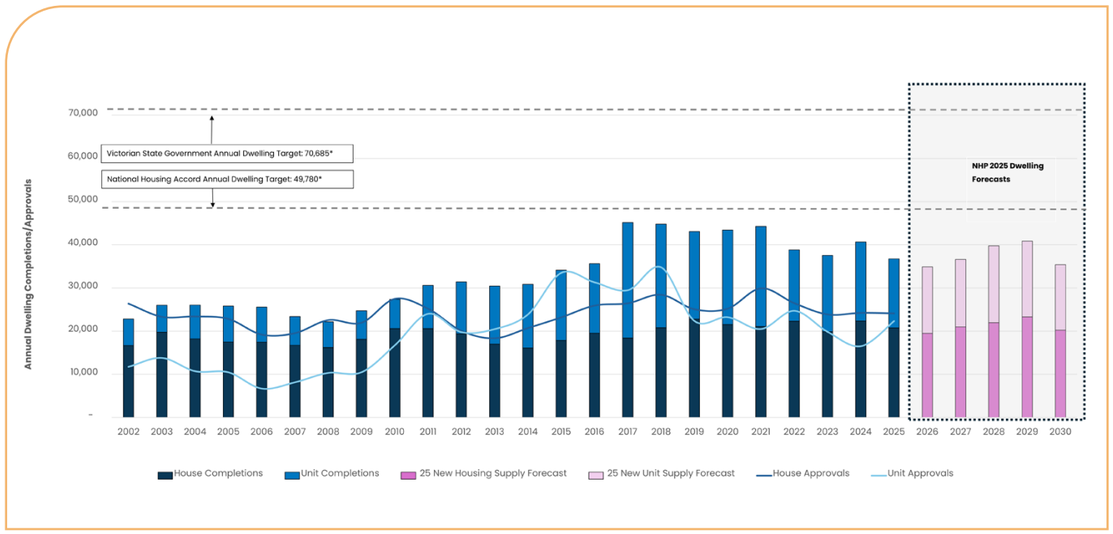


Figure 40: NHP 2025: Greater Melbourne & Geelong, Annual Dwelling Completions (Net), Approvals & NHP 2025 Dwelling Supply Forecast (FY)

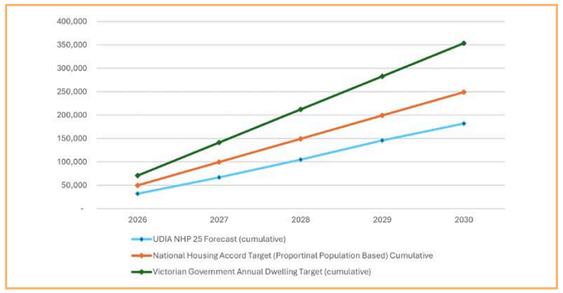


Figure 41: NHP 2025: Greater Melbourne & Geelong - Cumulative Dwelling Supply Forecast V National Housing Accord Target

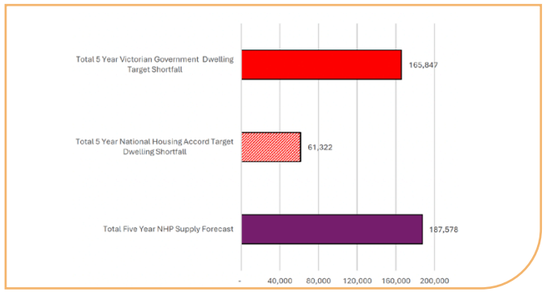


Figure 42: NHP 2025: Greater Melbourne & Geelong - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

*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.

Greater Melbourne

Policy Recommendations

Based on the NHP 2025 analysis, UDIA Victoria offers the following recommendations:

1. **Commitment to guaranteed long-term supply of zoned developable land**

   The Victorian Government should commit to a published, updated pipeline of a minimum supply of zoned and development-ready land across Melbourne and Victoria's major regional cities. This is critical to ensuring the state's long-term housing needs are adequately planned for and met. This is particularly important given the increasingly long time frames associated with planning and development of greenfield land.

2. **Accelerate enabling infrastructure planning and delivery**

   Victoria's rapidly growing population needs more than just new housing. Communities need early delivery of transport, health, schools, open space and utilities, aligned with where new homes are being planned and delivered.

   We are calling for a long-term, comprehensive infrastructure plan, setting out the state's priorities for transport, schools, and health facilities for metropolitan Melbourne and Victoria's regional growth centres. This plan must be based on an objective cost-benefit analysis with a focus on projects that unlock new housing in the fastest growing suburbs, where it is needed most.

3. **Streamline strategic planning and approval processes**

   The current approach to Precinct Structure Planning (PSP) for growth area development is plagued with inefficiencies and is not delivering the best outcomes for communities. It is also costing the state, local governments and developers more, and taking longer each year. Victoria needs a modern system that delivers positive strategic planning outcomes efficiently and economically, including a fast-tracked process for all priority employment and housing centres in strategic growth corridors.

4. **Mandated third-party approval and referral authority accountability**

   Over the last 10 years, third-party and referral authority approval processes have steadily increased in cost and time taken, making new homes harder and more expensive to build. Utilities, drainage and floodplain management, biodiversity, and cultural heritage are all critical to the success of meeting future housing targets. UDIA recommends clear statutory timeframes and penalties for non-performance to ensure approval processes better meet government, industry and community expectations and keep the state's delivery of housing, job centres and key infrastructure on-track.

5. **Integrate NHP findings into strategic planning policy**

   NHP research has identified a shortfall in the government's assumed long-term pipeline of developable land supply that threatens to undermine its own housing policy. Victoria needs a comprehensive audit of statewide development-ready land that includes a realistic assessment of infrastructure-ready and unconstrained land. UDIA's National Housing Pipeline® provides a robust, detailed and industry-trusted alternative to the existing Urban Development Pipeline (UDP).

6. **Address development feasibility constraints limiting housing delivery**

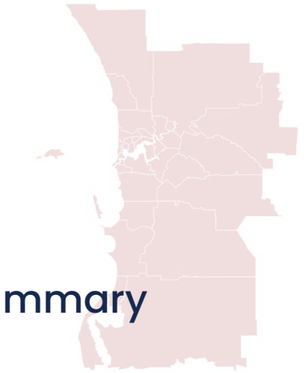
   Government should explicitly recognise development feasibility as a binding constraint on housing supply, particularly for infill and higher density projects. Policy settings relating to infrastructure charges, developer contributions, taxes and planning controls should be reviewed to ensure they do not impact housing delivery in locations critical to meeting housing targets.

7. **Improve collaboration across government and industry**

   UDIA is committed to working with government to achieve improve housing supply and affordability. Meaningful collaboration with industry peak bodies and project proponents is essential to ensure policy settings are grounded in real-world delivery conditions, including development timelines, costs, risks and market feasibility. Stronger engagement will support more effective policy design and improve the likelihood that housing targets translate into delivered homes.

Greater Perth

Land Supply & Development Constraints Summary



- As at August 2025 there was an estimated ***12,705 hectares*** of total aggregate vacant/undeveloped residential zoned land distributed across the Greater Perth region.
- ***35%*** (4,502 hectares) of undeveloped residential zoned land is constrained by one or more development constraint overlays, reducing the headline volume of unconstrained zoned residential land across the Greater Perth NHP Region to ***8,202 hectares***, with a total theoretical dwelling capacity of over ***164,000 dwellings****.
- The ***North-West Sub-Region*** holds the largest stocks of unconstrained zoned land and the largest stocks of constrained land with ~89,000 home sites potentially at delivery risk due to a variety of fundamental and additional constraints.
- Environmental constraints (including floodways, waterways & biodiversity/conservation designations) collectively account for 62% of NHP development constraint overlay on undeveloped residential zoned land.
- Refer to **Appendix 1** for a full breakdown of development constraints utilised in the NHP 2025 land supply assessment for Greater Perth.

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

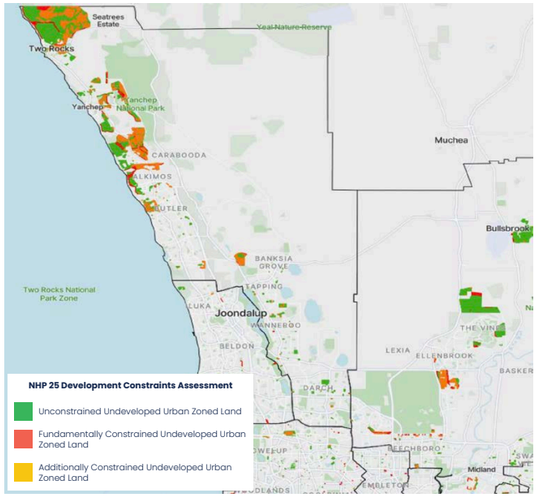


Figure 43: Aggregate Land Supply & Development Constraints on Undeveloped Urban Zoned Land (Aug 2025)

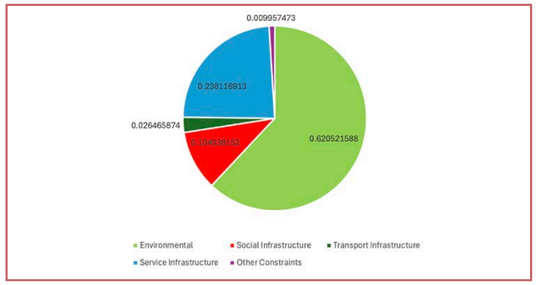


Figure 44: Greater Perth, Constrained Undeveloped Residential Zoned Land by Constraint Type

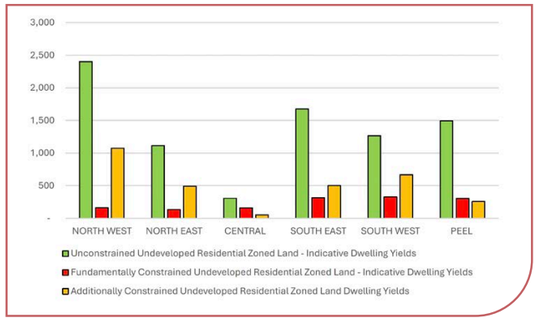


Figure 45: NHP 2025 Greater Perth Sub-Regions: Theoretical Dwelling Yield Capacity*

NHP 2025 – Greater Perth	Total Land Stocks (Hectares)	Total Indicative Residential Yield
Undeveloped Residential Zoned Land Stocks, **Unconstrained** (Aug. 2025)	8,202	125,400 Dwells
Undeveloped Residential Zoned Land Stocks, **Constrained** (Aug. 2025)	4,502 Ha	90,040 Dwells
Environmental **Constraints** Overlay on Undeveloped Residential Zoned Land Stocks (Aug. 2025)	2,808 Ha	70,200 Dwells

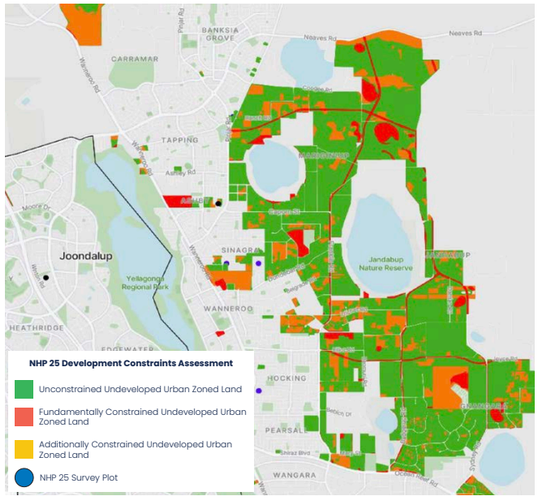
5.96 years

of unconstrained residential land supply at National Housing Accord annual dwelling target take-up rate (~21k)

Greater Perth

Developer Intentions Survey Summary

- Following a concerted recruitment campaign, UDIA WA recorded a 43% increase in NHP 2025 developer survey yield coverage on the year prior, with a total of 108,300 aggregate dwellings covered in the forward pipeline.
- There was a 20% lift in multi-unit/apartment coverage in the developer survey which is especially pleasing given the low current levels of multi-unit commencement activity –which is weighing the overall supply pipeline down.
- Around 32% of forward pipeline requires rezoning, 25% is awaiting a development application and/or planning proposal determination.
- Trunk sewer funding or commitment is the largest 'at risk' component of the forward pipeline with 30% (~28,100 detached dwellings).



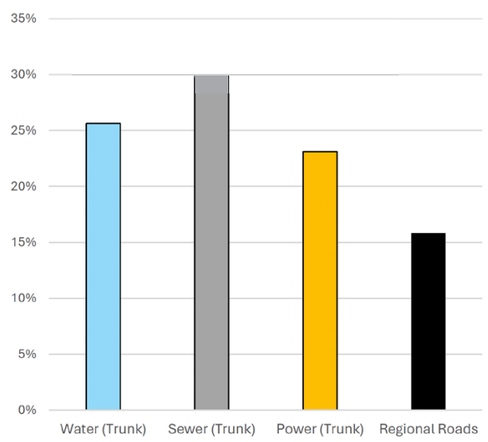


Figure 46: NHP 2025, Proportion of NHP Survey Yields Requiring Enabling Infrastructure Commitment/Funding (Greater Perth)

30%
forward pipeline at risk - sewer
(Trunk Sewer Infrastructure)

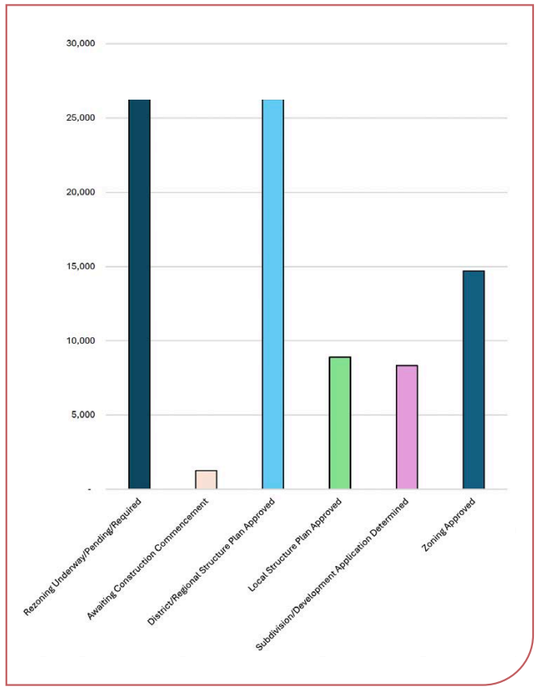


Figure 47: Greater Perth, Detached House Survey Yields by Planning & Development Status (Aug 25)

Greater Perth

Sub-Region Supply Outlook

- UDIA's dwelling supply forecasts for FY26 to FY30 highlights significant dwelling shortfalls against WA State Government Dwelling targets* for all sub-regions, highlighted by the South East Sub-Region which is forecast to miss it's target by 40% or over 6,000 dwellings, followed by the North West also missing it's target by a similar volume.
- Challenging conditions for multi-unit production generally, but especially outside particular pockets of the Central Sub-Region (e.g. South Perth, Applecross, Cottesloe, Nedlands, and Subiaco) equates to very limited apartment and townhouse supply in each of the five growth sub-regions. The feasibility challenges to delivering infill dwellings to market in WA is reflected in current production levels seeing units comprise around 16% of total supply, versus the overarching Perth and Peel target of ~47% infill.

Sub-Regional Dwelling Supply Snapshot

NHP 25 Dwelling Supply Forecast v Dwelling Target: 5 Year Yield Position

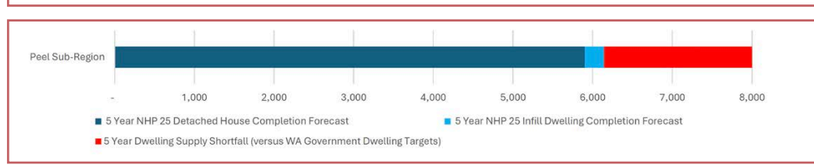
-28%
5,930 Dwellings
Below Target

-16%
2,170 Dwellings
Below Target

-29%
4,580 Dwellings
Below Target

-40%
6,040 Dwellings
Below Target

-16%
4,370 Dwellings
Below Target



-23%
1,855 Dwellings
Below Target

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

Greater Perth

NHP 2025 Forecast versus Five Year Housing Target

- The updated National Housing Accord derived target for Greater Perth is 21,050 dwellings per annum which is forecast to be comprehensively undershot over the coming five years, with a combined shortfall of ~25,000 newly built homes (detached and multi-unit combined).
- Greenfield land production has been operating close to industry capacity for two calendar years, and is now critically under supplied, with the amount of stock remaining available on market at the close of the December quarter and the lowest levels of 30 years of UDIA WA Urban Development Index tracking of the WA greenfield market. This capacity issue is also related to the scale of new green field projects becoming smaller and more challenging to bring on-line due to various development challenges and constraints. Accordingly, overall greenfield production is expected to gradually reduce in over all annual output over each of the coming five years.
- On going challenges and structural weakness in the multi-unit sector is expected to keep apartment and townhouse completed supply muted over much of the coming three years, with the potential for a gradual uplift in multi-unit completion volumes in FY29 and FY30.

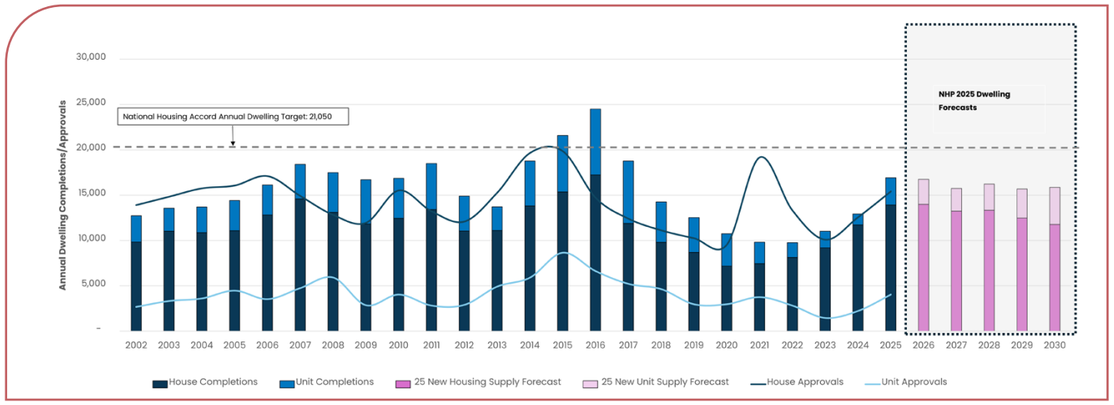


Figure 48: NHP 2025: Greater Perth, Annual Dwelling Completions (Net), Approvals & NHP 2025 Dwelling Supply Forecast (FY)

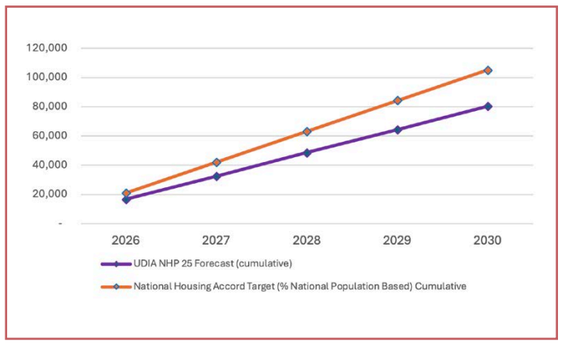


Figure 49: NHP 2025: Greater Perth - Cumulative Dwelling Supply Forecast versus National Housing Accord Target

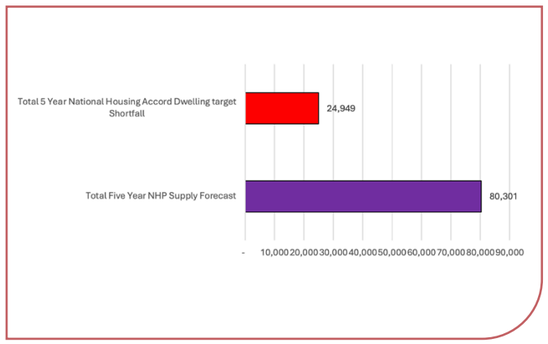


Figure 50: NHP 2025: Greater Perth - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall versus National Housing Accord Target

*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.

Greater Perth

Policy Recommendations

UDIA WA continues to advocate for a strategic and multi-pronged approach to accommodate our rapidly growing population that removes unnecessary barriers and costs to development, streamlines approval processes, ensures we attract and retain an appropriately skilled construction workforce, and ensures infrastructure is delivered where and when it is needed. This must be underpinned by a whole-of-government commitment to deliver on a shared vision for accommodating future population growth in Perth and Peel, and WA, and culture, policy and practice within agencies that facilitates achievement of this.

UDIA WA offers the following recommendations to unlock land and support a sustainable housing pipeline in WA:

1. **First, Do No Harm**

   That Government commits to no increase in taxes, fees or charges, particularly those that impact the feasibility of higher density infill projects, and that all new or amended legislation and policy that could impact diverse and affordable housing supply is carefully examined through a housing affordability lens.

2. **Plan and invest in infrastructure 'at the right time' to accelerate housing delivery**

   That the State Government establishes and resources a centrally controlled mechanism/body with a clear mandate to coordinate and facilitate strategically important infrastructure priorities focused on enabling housing supply. There should also be a funding commitment to build on the initial investment in the $400m Housing Enabling Infrastructure Fund (HEIF), boost capacity for long-lead infrastructure items to be 'Made in WA' and to ensure an increase in funding for Water Corporations CAPEX budget. This is all critical to support coordination, funding and delivery of enabling infrastructure 'at the right time' to accelerate housing delivery in the areas that will deliver the greatest housing yields. This should include those areas and infrastructure packages identified in UDIA WA's Growth Areas Infrastructure Requirements Report.

3. **Seek to level the playing field on taxation and incentivise infill development**

   That the State Government addresses the impacts of the layering of policy, taxes and charges impacting the viability is higher density development and mobility in the housing stock. The State Government should commit to resource a comprehensive review of property taxes and implement a more equitable and efficient system in this term of Government. In the interim, there must be an extension of the stamp duty concession for off-the-plan and under construction apartments and town homes, the foreign buyers surcharge should be removed or at least suspended for two years, and land tax costs from Development Application to completion should be removed to support apartment projects.

4. **Low-cost finance to help bridge the viability gap for diverse housing supply**

   That the State Government leverage opportunities with Keystart's transition to a Government Trading Enterprise and its newly legislated commercial property finance function to provide products to bridge the feasibility gap to boost delivery of medium and higher density project. This should include low-interest mezzanine finance as part of the capital stack and underwriting stock to help with pre-sales requirements, as well as low-interest loans to help address construction cost challenges and support and accelerate the delivery of housing in regional centres.

5. **Deliver a more strategic and efficient environmental approvals framework**

   That the State Government establishes a planning-led environmental decision-making framework to better enable the delivery of new homes while protecting the environment. This should include accelerating environmental regional planning for Perth and Peel in collaboration with the Federal Government and resourcing the development of a strategic plan and fund for offsets and rehabilitation. It is essential there is integration and alignment between the State system and the framework being created through the Federal environmental law reforms.

6. **Improve land and dwelling supply forecasting and monitoring**

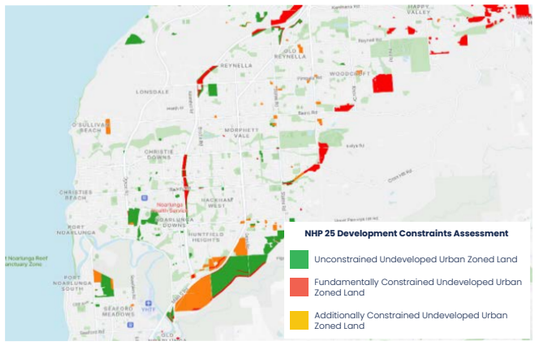
   The State Government should allocate funding for a comprehensive review of how it forecasts land supply for the delivery of new homes to ensure an accurate picture of the forward pipeline and enable better integrated land use and infrastructure planning building off UDIA's National Housing Pipeline® analysis. There should also be investment in a platform which incorporates supply forecasting and monitoring with functionality for management and streamlining of planning applications and approvals to drive efficiencies and cost savings.

Greater Adelaide

Land Supply & Development Constraints Summary

- As at August 2025 there was an estimated ***7,857 hectares*** of total aggregate vacant/undeveloped residential zoned land distributed across the Greater Adelaide region. There was an additional ***16,018 hectares*** of potential future residential land stocks (within ***deferred urban & future growth areas***).
- ***37%*** (2,923 hectares) of undeveloped residential zoned land is ***constrained*** by one or more development constraint overlays, reducing the headline volume of unconstrained zoned residential land across the Greater Adelaide NHP Region to 4,934 hectares, with a total theoretical dwelling capacity of around 74,000* dwellings.
- The ***Outer North Region*** holds the largest stocks of unconstrained zoned residential land (yield potential for 30,400 detached dwellings), but also the largest stocks of constrained land with 21,000 home sites potentially at delivery risk due to a variety of fundamental and additional constraints.
- Environmental constraints (including floodways, waterways & biodiversity/conservation designations) collectively account for 55% of NHP development constraint overlay on undeveloped residential zoned land.
- Refer to **Appendix 1** for a full breakdown of development constraints.

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



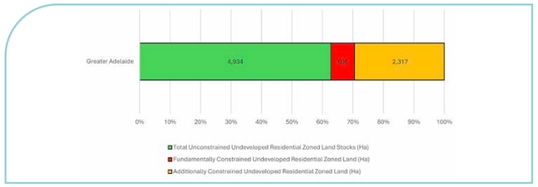


Figure 51: Aggregate Land Supply & Development Constraints on Undeveloped Urban Zoned Land (Aug 2025)

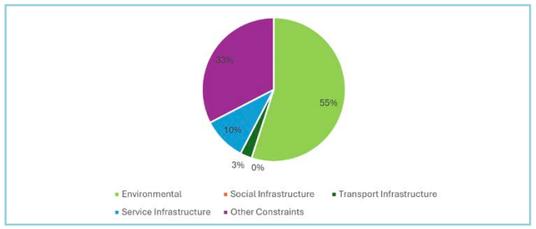


Figure 52: NHP 2025 Greater Adelaide Undeveloped Residential Land Constrained by Type

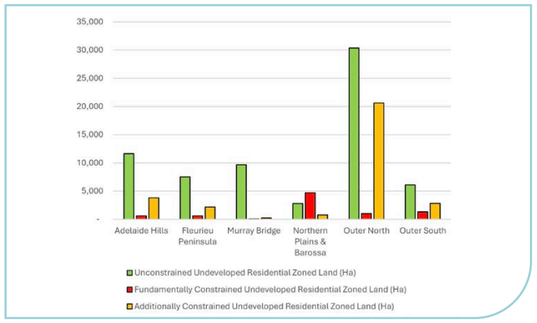


Figure 53: NHP 2025 Greater Adelaide Growth Regions: Indicative Dwelling Yield Potential

NHP 2025 – Greater Adelaide	Total Land Stocks (Hectares)	Total Indicative Residential Yield Potential
Undeveloped Residential Zoned Land Stocks, **Unconstrained** (Aug. 2025)	**4,934 Ha**	**74,010 Dwells**
Undeveloped Residential Zoned Land Stocks, **Constrained** (Aug. 2025)	**2,923Ha**	**43,845 Dwells**
Environmental **Constraints** Overlay on Undeveloped Residential Zoned Land Stocks (Aug. 2025)	**1,608 Ha**	24,120 Dwells

5.71 years
of unconstrained zoned 'development ready' residential land supply@ national housing accord annual dwelling rate

Greater Adelaide

Developer Intentions Survey Summary

- As a result of a recruitment drive by UDIA SA, there has been a dramatic increase in developer participation and dwelling pipeline volumes covered in the NHP 2025 Survey phase, with a total of ***31,450 dwellings*** captured across Greater Adelaide -with 14 individual development firms contributing survey responses.
- Around 31% of the surveyed forward pipeline requires rezoning, 10% is awaiting a development application and/or planning proposal determination, and a further 31% of yield is still awaiting submission of a planning proposal.
- Trunk sewer funding or commitment is the largest 'at risk' component of the forward pipeline with 32% (~9,500 detached dwellings), followed by trunk water infrastructure with similar volume of impacted forward yields.

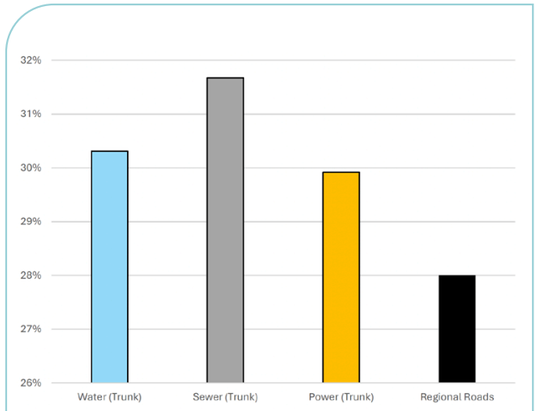
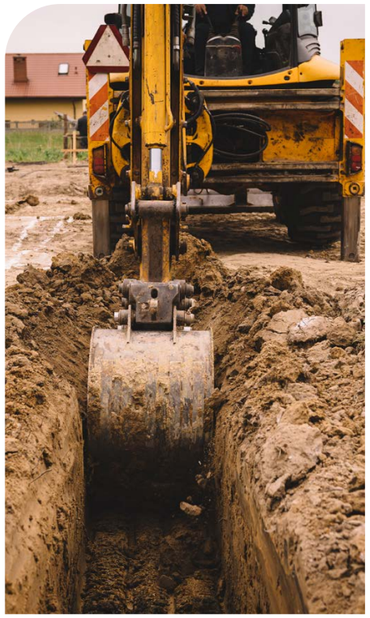


Figure 54: NHP 2025 Proportion of NHP Survey Yields Requiring Enabling Infrastructure Commitment/Funding (Greater Adelaide)

32%
forward pipeline at risk - sewer
(Trunk Water Infrastructure)



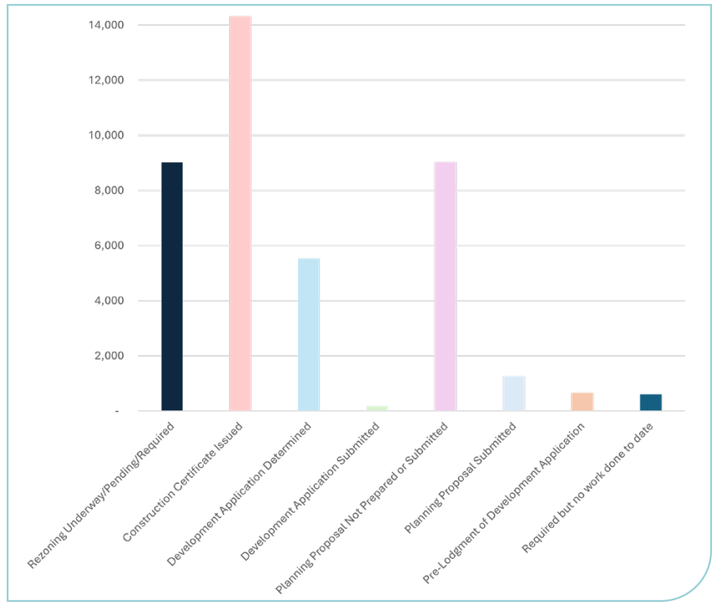


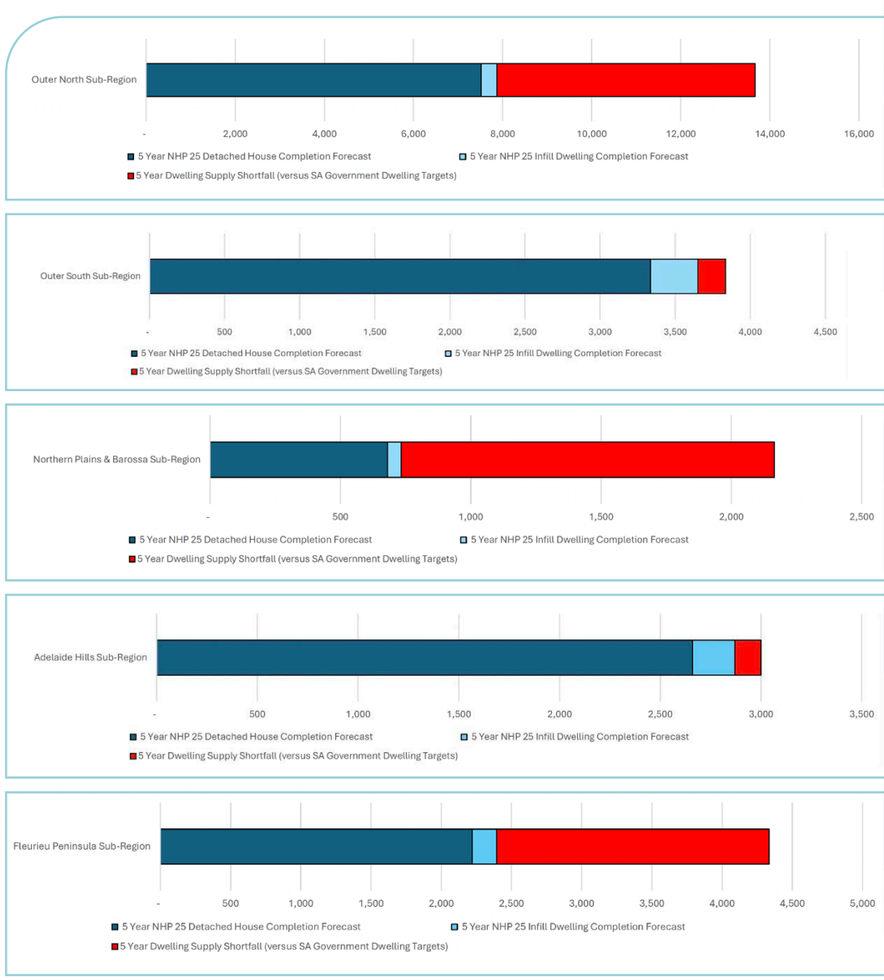
Figure 55: NHP 2025 Greater Adelaide, Total Survey Dwelling Yield by Planning & Development Status (Aug '25)

Greater Adelaide

Sub-Region Supply Outlook

- UDIA's dwelling supply forecasts for FY26 to FY30 highlights dwelling shortfalls against SA Government Dwelling targets for all sub-regions, highlighted by the greenfield growth engine of the Outer North which is forecast to miss it's annualised target by 42% over the coming five years (~5,800 dwelling shortfall).
- The shortfalls are however relatively modest in aggregate terms across most the rest of the major sub-regional housing markets.
- Greenfield production is forecast to better match-up to targets than infill targets, led by strong supply delivery in the Outer North & Outer South sub-regions.

Sub-Regional Dwelling Supply Snapshot



Greater Adelaide

NHP 2025 Forecast versus Five Year Housing Target

- The National Housing Accord derived annual dwelling target for Greater Adelaide is 12,960, which totals 64,800 dwellings across the FY26 to FY30 forward period.
- The NHP 2025 analysis indicates that despite an uptick in aggregate forecast production from NHP 2024, there will still be a substantial dwelling production shortfall across the Greater Adelaide reporting region over the coming five years to FY30. The combined dwelling supply shortfall is estimated to be around 14,500 dwellings, with the year-on-year supply shortfall averaging 22% below of the annual target.
- The forward supply potential of new housing from greenfield release areas and across the established urban footprint has firmed over the last twelve months, as has the prospects for infill housing (including both apartments and townhouses) on the back of improving development feasibilities –for projects in certain locations.

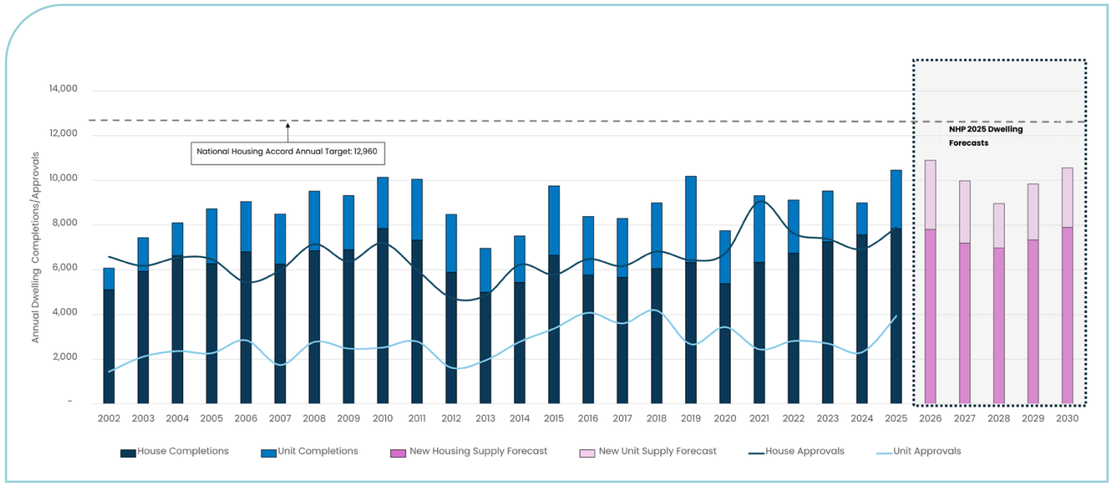


Figure 56: NHP 2025: Greater Adelaide, Annual Dwelling Completions (Net), Approvals & NHP 2025 Dwelling Supply Forecast (FY)

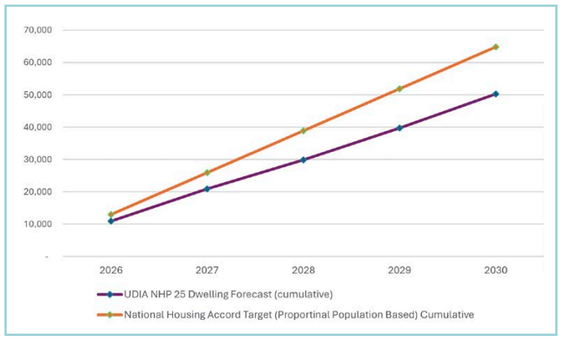


Figure 57: NHP 2025: Greater Adelaide - Cumulative Dwelling Supply Forecast V National Housing Accord Target

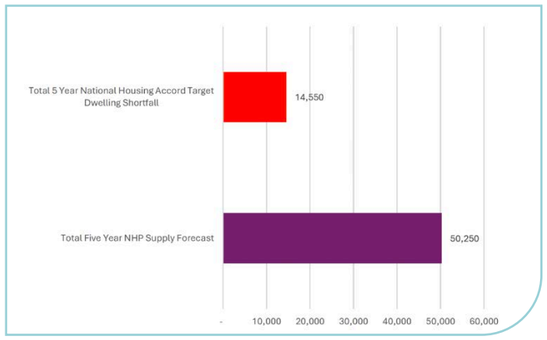


Figure 58: NHP 2025: Greater Adelaide - 5 Year Dwelling Supply & Cumulative Dwelling Supply Shortfall V Accord Target

*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.

Greater Adelaide

Policy Recommendations

Based on the NHP 2025 analysis, UDIA SA offers the following recommendations:

1. **Accelerate the delivery of enabling infrastructure and embrace contestability to empower the private sector to clear the blockages**

   Continued attention from the State Government on the need for infrastructure delivery is leading to the on-time delivery of the Premier's Housing Roadmap. However beyond this defined scope of work, getting traction to respond to need is an immense challenge. Urgent interventions are required to stop sites from demobilising. Where the Government is unable to manage the direct delivery of infrastructure, it must allow the private sector to deliver these infrastructure projects in order to maintain a reliable supply of housing.

2. **Respond to sub-regional markets by ensuring breadth of land supply**

   Land supply is facing such a shortage, that any additional allotments would be welcomed across the State. However, it is clear that the outer northern metropolitan region will dominate growth over the coming decades. This does not provide the market with sufficient opportunities to respond to demand in terms of location or typology. There needs to be more preparedness to acknowledge the formidable choices on land availability particularly in the south and the Hills Face Zone.

3. **Increase volume of infrastructure delivered through works in kind**

   As the State Government continues along the path of infrastructure schemes, clarity on how works in kind can be leveraged to deliver better return on investment and the faster provision of infrastructure is more important than ever. Indeed, recognising the need for immediate up-front delivery should have an incentivisation benefit associated with the arrangement. True contestability on all relevant infrastructure particularly water and sewer infrastructure should be the aim of Government to support market-led solutions.

4. **Expand data transparency and opportunities for developer insight**

   Data tools like the National Housing Pipeline® can work hand in glove with State Government data sources like the Land Supply Dashboard delivered by the Government in response to advocacy from the UDIA. The insight provided by developers combined with transparency on network capacities can help developers identify where to focus their efforts to bring houses to market sooner and Government where their investment in infrastructure will have the greatest impact. Too often, early investigations do not identify future constraints in a timely manner and indications of future approvals disappear. Transparency combined with deeper engagement with private sector developers to recognise the insight they can provide will lead to better data and better decisions.

5. **Unlock the next growth fronts to ensure land supply aligns to Government projections**

   Recent analysis released by the Government shows the need for South Australia to deliver 13,500 houses per year for the foreseeable future. This was described as a baseline. In the 30 Year Plan for Greater Adelaide this is at the outer bound of the high-growth scenario. There is a need to realign the timings within the 30 Year Plan to accelerate delivery and identify future growth fronts and additional opportunities.

6. **Appropriately resource state agencies, utility providers, and councils for faster approvals**

   Coordination failures between private project owners and public authorities occur across different stages of the planning and approvals process. In many cases, this failure occurs at the network planning stage, which leads to an information mismatch between private firms and the public authority. This mismatch results in uncertainty for both planners and producers, which inevitably results in additional and unforeseen cost outlays. It is essential to streamline this process in order to facilitate faster dwelling delivery.

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 and enabling infrastructure and slow planning/environmental approvals. The NHP identifies where these roadblocks exist and help focus the Government's efforts.

The Government at the Federal and State level have instituted many important demand-side housing initiatives, but their strategy must broaden to include supply-side policy if Australia is to ever solve the housing crisis.

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

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

1. Build the Homes We Need

1.1. Boosting delivery of First Home Buyer Housing (FHB).

1.2. Remove housing supply barriers through FHB initiative (or upfront Accord Bonuses).

1.3. Increase the Accord Bonus (or create another bonus fund).

1.4. Double HAFF funding for more Affordable and Social Housing.

2. Fast-Track Housing Infrastructure

2.1. Direct Federal funding to housing enabling infrastructure.

2.2. Prioritise existing Federal infrastructure funding that supports new housing.

2.3. Use part of the Accord Bonus to fund infrastructure upfront.

3. Release More Land Supply

3.1. Supply Government land for diverse private housing projects.

3.2. Provide incentives for development ready land and work to halve planning times in order to unlock surplus Government land.

3.3. Fast-track housing with federal construction debt and equity guarantees.

3.4. Establish independent housing performance metrics.

4. Environmental Housing Strategies

4.1. Clear the EPBC housing approval backlog.

4.2. Align State & Federal criteria as a single, simple EPBC approval.

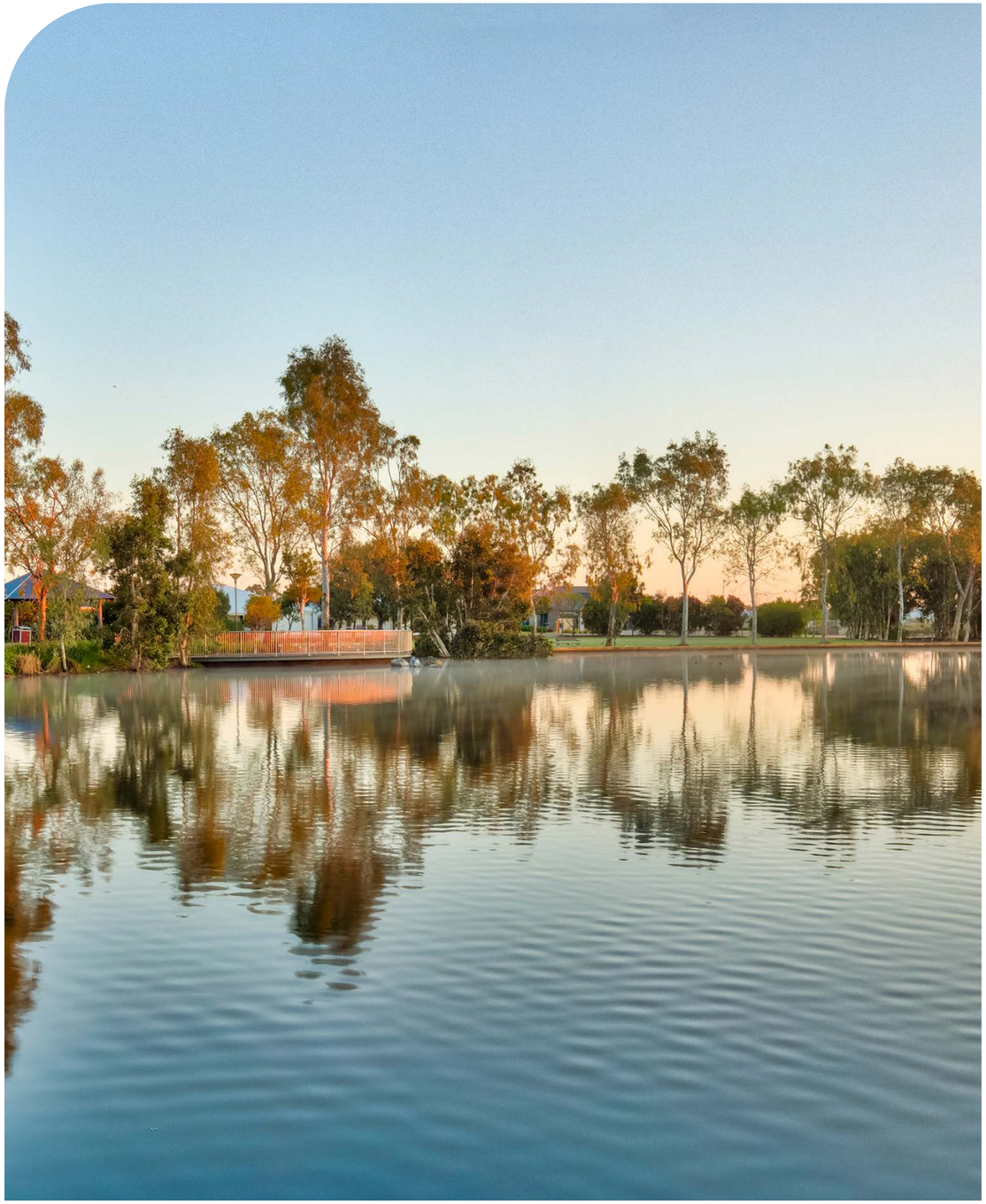
4.3. Incentivise green technology in well-priced housing.

5. Boost Housing Capability

5.1. Minimise property fees and taxes holding back affordability.

5.2. Increase stamp duty thresholds, fast-track the National Construction Code Reform.

5.3. Prioritise housing-skilled migrants & accelerate residency for migrants.



Conclusions and Next Steps

The publication of this NHP 2025 Technical Report and the accompanying Executive Summary marks the completion of a second year of NHP analysis and reporting nationally. The NHP 2025 program sought to incorporate various improvements and program modifications to the NHP Pilot of 2024.

A key focus for NHP 2025 was to increase the participation of developers in the NHP survey phase, as well as increase the depth of infill development site intelligence through the research collaboration with Urbis as well as modifying the land supply and constraints mapping to better capture infill development opportunities and constraints.

There was a satisfying 46% increase on overall dwelling yield captured by the NHP 2025 Survey phase, with notable uplifts in Adelaide, Melbourne and Perth. Not only did the NHP 2025 Survey intelligence increase significantly in terms of project and dwelling coverage, there was also a more detailed array of development insights assembled through the survey as a result of additional questions and reframed questions to assist with reporting clarity around timing and types of development challenges and constraints.

There was also an increased number of NHP Technical Workshops and NHP Outlook Forums which took place across the year, which underscores the broad-based member and industry value being generated by the NHP. UDIA is delighted with the increased traction and engagement generated by the new annual cycle of data collation, events, and reporting outputs.

The NHP 2025 reporting once again confirms the critical importance of quantifying development ready land stocks, highlighting the extent of development constraints across greenfield and infill locations, and providing a robust evidence base for producing short, medium and longer term dwelling supply forecasts.

The NHP has identified major discrepancies in official government authority on forward dwelling supply versus what can be realistically delivered. There remains an enormous challenge facing each major Australian capital city region to significantly lift aggregate dwelling production output – to bridge the very significant dwelling shortfalls against the National Housing Accord and other State Government dwelling production rate targets.

A clear message continuing to emerge from the NHP analysis is that across Australia's major housing markets, residential development is time consuming, costly and complicated. As time frames for delivery continue to push out for various reasons, two things can happen:

1. Housing is not delivered in a timely fashion in service of the needs of the community or the objectives of Government.

2. Housing becomes more expensive as developers accumulate a range of costs resulting from a variety of compliance obligations, project delays, coordination failures, and uncertainties. These costs must be added to the final sale price.

NHP 2025 analysis confirms that while there is no single factor among the complex array of factors which determine the current economic environment we find ourselves in, there is great benefit to all stakeholders nationally, statewide and locally, in collectively and collaboratively using a comparable data and evidence base.

UDIA strongly supports view that future decision making on infrastructure investment, urban land release and planning control flexibility cannot be accomplished without a fulsome understanding of developers' capacity and intentions.

We encourage all Government agencies and departments to continue to frame the land supply narrative as a collaborative effort that identifies developer intentions as an integral part of future decision-making, and one of the key sources of truth on which to construct our evidence-based approach.. UDIA looks forward to including these annual findings in our on-going engagement across various levels of government. It is critically important that any plan for housing and enabling infrastructure is backed by industry experiences, and the NHP provides the ideal platform to put this into action.

The 2026 UDIA National Housing Pipeline® will adhere to the roll-out schedule displayed in Figure 59 overleaf.

NHP 2026 Phase 1:
Land Supply & Constraints Mapping
Q2 - 2026

↓

NHP 2026 Phase 2:
Developer Intentions Survey
Q2 - 2026

↓

NHP 2026 Phase 3:
Technical Workshops
Q3 - 2026

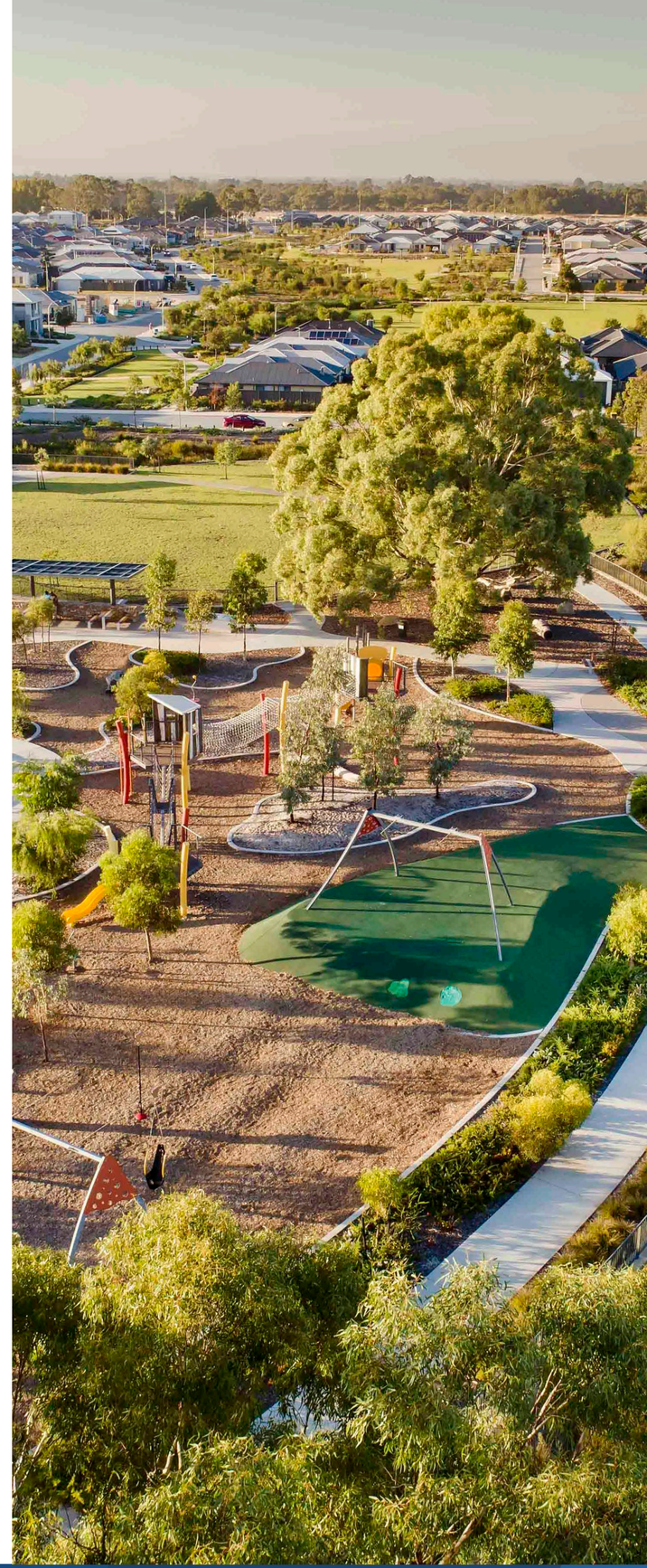
↓

NHP 2026 Phase 4:
Outlook Forums
Q3 - 2026

↓

NHP 2026 Phase 5:
Reporting & Advocacy
Q4 - 2026

Figure 59: NHP 2025 Project Phase Timings



NHP Technical Terms Glossary

1. Land Supply

The UDIA NHP collects land supply data from four major sources, which provides a powerful multi-focal view of forward land potential for residential development over a 10-year horizon.

Source One - Land Supply & Development Constraints Mapping (NHP Phase 1)

A nationally consistent annual aggregate snapshot of appropriately zoned and available for development land supply, as well as potential future zoned land supply, which is overlaid with various 'development constraints' to identify what land is or could actually be available for forward residential development.

Source Two – Developer Intentions Survey (NHP Phase 2)

Annual deployment of a bespoke digital survey tool for developers to geo-spatially identify all undeveloped land holdings, total and year-on-year dwelling yield expectations, as well as the status of planning, development and environmental approvals, in addition to key enabling infrastructure requirements. This survey provides aggregated project/land holding land supply insights collated across a range of both greenfield and urban infill project locations.

Source Three – Infill Supply and Additional Sites Intelligence (NHP Phase 3)

Draws together additional supply information to inform NHP annual dwelling pipeline forecasting, including from Cotality (Cordell Connect), State Government Land Supply Monitors and the Australian Bureau of Statistics. In NHP 2025 program, UDIA partnered with Urbis to help curate the a sub-set of apartment and townhouse production forecasts by LGA.

Source Four – Technical Workshops (NHP Phase 3a)

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. These technical workshops help vet the localised and the aggregated scales (LGA/Sub-Region/Metro Region) of forward land supply and dwelling production potential.

1a. Undeveloped/Vacant Urban (Residential) Zoned Land Assessment (Aggregate)

Annual assessment of metropolitan region wide undeveloped urban/residential zoned land parcels that have genuine residential development potential. The nationally consistent GIS methodology includes the removal of land parcels with significant built form development coverage, in addition to parcels with clearly identifiable community infrastructure and other land uses which indicate unlikely development potential in the short to medium term.

The NHP 2025 presents undeveloped residential zoned land stocks in terms of gross area (hectares) and is designed to be a recent snapshot in time (i.e. 3 to 6 month temporal lag) and captured during the September quarter each year. This metric is directly comparable to certain State Government land supply monitoring programs including the WA Urban Growth Monitor, and the Plan SA Land Supply Dashboard.

1b. Potential Future Urban Zoned Land

Each State and Territory has a unique approach to spatial planning and future urban expansion designation. Table 2 sets out the land use categories utilised for NHP 2025 aggregate supply analysis. All NHP reporting regions except Greater Sydney had a 'future residential' designations that individually or collectively comprised the 'potential future urban zoned land' supply assessment. This is reported upon in terms of both 'aggregate' land stocks, as well as 'unconstrained' land stocks.

1c. Years of Unconstrained Land Supply

NHP 2025 presents a nationally consistent approach to measuring forward land supply potential through the following approach:

Step One: Establish up-to-date position of total stock of unconstrained residential zoned land supply, by LGA;

Step Two: Calculate theoretical dwelling capacity estimates based on LGA scale aggregation of location-based average density generated dwelling yield potential.

Step Three: Divide the total theoretical dwelling capacity estimate by the relevant Greater Capital City Region scale National Housing Accord dwelling target take-up rate. This calculation delivers the UDIA NHP 2025 estimate of 'years of land supply' for each NHP reporting region.

2. Development Constraints Assessment

The UDIA NHP spatial analysis undertaken in Phase One includes a comprehensive analysis of 'development constraints' impacting undeveloped residential zoned land, and potential future residential zoned land across the five NHP Capital City reporting regions.

The focus of this analysis is to identify the 'hard' constraints to development arising from environmental and other land use designations over residentially zoned land. The NHP 2025 reports on two categories of constraint layers as follows:

2a. Fundamental Development Constraint

Development constraints that effectively sterilise a site from future residential development yields. This can include environmental features such as wetlands and protected vegetation coverage. These areas are shaded red on NHP output mapping.

2b. Additional Development Constraint

Development constraints that will make it challenging to develop but where future dwelling yields may be able to realised once the constraint is able to be mitigated/resolved. This can include certain types of environmental overlays (e.g. Threatened Ecological Species TEC in Western Australia) and service/amenity overlays (eg State Forest, private golf courses). Thes areas are shaded green on NHP output maps.

Please refer to Appendix One for a State-by-State break-down of development constraint layers used in the NHP 2025 analysis.

2c. Unconstrained Undeveloped Residential Zoned Land

Assessed land supply which passes the NHP development constraints sieve mapping process (involving the overlay of all fundamental and additional constraint layers) is deemed to be 'unconstrained' aggregate land supply, which is theoretically available for forward development. These areas are shaded green on NHP output mapping.

Please note: The NHP 2025 development constraints assessment does not assess other types of often cited 'development constraints' including: enabling infrastructure gaps; land fragmentation and development feasibility, at this Phase One scale. These types of additional 'development challenges' are examined through the Phase Two Developer Intensions Survey, through aggregated project scale intelligence.

NHP Technical Terms Glossary

3. Developer Intentions Survey

A key NHP intelligence gathering component is through the Phase Two NHP Developers Intentions Survey Tool. The NHP survey captures a variety of project scale information around developer owned/controlled landholdings, including:

1. Precise geo-spatial boundaries of all submitting developer's undeveloped landholdings (greenfield and infill locations).
2. Status of enabling infrastructure requirements required to deliver against forecast delivery timelines (regional roads, water, sewer & power).
3. Status of environmental/biodiversity (State and Federal), planning and development approvals.
4. Total development site/landholding yield capacity, and 10-year annualised forecasts of new dwelling commencements by type (detached house, townhouse, mid-rise apartment, high-rise apartment).

The Developer Intentions Survey provides an up-to-date evidence base around the current state of play for infrastructure requirements for specific corridors and precincts. This NHP developed data has been utilised within other UDIA State Division projects, such as the UDIA NSW Building Blocks, and the UDIA WA Infrastructure Requirements reporting and advocacy.

3a. Enabling Infrastructure Requirements

The NHP survey collects project scale intelligence across four major categories of development enabling (Trunk) infrastructure:

1. Trunk Water Supply
2. Trunk Sewer
3. Trunk Power/Electricity
4. Regional Roads.

The NHP survey collects information about the current delivery status of each category of enabling infrastructure provision, as well as insights around:

- Indicative timing required for enabling infrastructure provision to enable development to proceed as per current project plans.
- Developer capacity to deliver infrastructure themselves – if it were permitted.
- Identity of the provider of the required infrastructure – if it were other than the main State based agency (i.e. Sydney Water, Water Corporation, SA Water etc)

3b. Environmental/Biodiversity Approvals

The NHP 2025 Survey sought deeper insights than the previous year from developers about the status of Environmental Approvals development site/landholding's status and approval pathway.

The NHP 2025 survey asked developers to specify whether State and/or Federal Government Environmental Approvals were required to proceed, and what the precise stage of approval was up-to, inclusive of whether an off-set plan was required and whether off-sets had been identified for any environmental removal/encroachment.

The power of this particular analytical lens into the forward development pipeline, will become heightened as the NHP spatial coverage of development sites continues to increase across the nation in 2026 and beyond.

4. New Dwelling Supply Forecast

The annual assembly of land and new dwelling supply intelligence from various sources through the NHP program provides the deep evidence base for UDIA's five year new dwelling supply forecasts.

The new dwelling supply forecasts are prepared at an LGA scale and aggregated to reporting sub-regions and major capital city region scales. Each supply forecast is published with an estimated '5 year dwelling supply shortfall' as measured against established new dwelling production targets (i.e. the National Housing Accord, and State and Territory government mandated targets).

The NHP 2025 dwelling forecast methodology utilises a unique 'bottom-up/top-down' moderated approach, harnessing 10 key input variables. The NHP forecasts provide estimates for new dwelling completions (net) across detached houses, townhouses, mid-rise and high-rise apartments. The UDIA NHP forecasts cover both greenfield release areas and infill development across the established urban footprint.

Appendix 1a: **Development Constraints Analysis**

New South Wales

UDIA NSW engaged MNG to undertake the 2025 NHP development constraints spatial mapping and analysis for the Sydney Mega-Region. The development constraints layers utilised were as follows:

Table 3: Land use categories used for aggregate land stocks assembly

Development Constraint Layer	Constraint Category
EPI Ramsar Wetland	Fundamental
EPI Riparian Lands & Watercourses	Fundamental
EPI Flood (AEP 1 in 100)	Fundamental
EPI Native Vegetation Protection	Fundamental
EPA Biodiversity Values Map	Additional
EPI Environmental Conservation Areas	Fundamental
EPI Environmental Sensitive Land	Fundamental
EPI Territorial Biodiversity Map	Fundamental
RFS Bushfire Risk	Additional
EPI strategic Agricultural Land	Additional
EPI Heritage Items	Additional
EPA Notified Contaminated Sites	Additional
EPI Landslide Risk	Additional
EPI Foreshore Building Line	Fundamental
NSW Places of Interest	Additional
SINSW Master Dataset	Fundamental
NSW Roads	Fundamental
NSW Railway Lines	Fundamental
NSW Easements	Additional
TfNSW Rail + Metro Stations	Additional
NSW Pipelines	Fundamental
NSW Transmission	Fundamental
NSW Tanks	Fundamental
NSW Substations	Fundamental

More technical details on the Sydney Mega-Region spatial mapping phase available on request. Please email Nathan Boulous: nboulous@udiansw.com.au.

Appendix 1b: **Development Constraints Analysis**

South East Queensland

UDIA QLD engaged JFP to undertake the 2025 NHP development constraints spatial mapping and analysis for South East Queensland. The development constraints layers utilised were as follows:

Table 4: Land use categories used for aggregate land stocks assembly

Development Constraint Layer		Constraint Category
Matters of State Environmental Significance	High Ecological Significance Wetlands	Fundamental
	Protected Areas (Estates & Nature Refuges)	Fundamental
	Marine Parks	Fundamental
	Category A and B Endangered Regional Ecosystems v11	Fundamental
	Legally Secured Offset Areas (Registered Vegetation Offsets)	Fundamental
	Legally Secured Offset Areas (Offset Register)	Fundamental
	Wildlife Habitat Endangered & Vulnerable	Fundamental
	Wildlife Habitat Species Least Concern	Fundamental
	Fish Habitat A	Fundamental
	Fish Habitat B	Fundamental
	Flooding	Fundamental
Koala	Koala Habitat (Core v1.0)	Fundamental
	Koala Habitat (Local Refined Habitat v1.1)	Fundamental
Road + Rail Corridors	Future State-Controlled Road	Fundamental
	Future Railway Corridor	Fundamental
	State-Controlled Road	Fundamental
	Railway Corridor	Fundamental
Gas & Electric Corridors	Energex Electricity Substation 10m Buffer	Fundamental
	Ergon Electricity Substation 10m Buffer	Fundamental
	Powerlink Electricity Substation 10m Buffer	Fundamental
	Energex Easement	Fundamental
	Powerlink Easement	Fundamental

More technical details on the SEQ spatial mapping phase available on request. Please email Taylor Hood: thood@udiaqld.com.au.

Appendix 1c: **Development Constraints Analysis**

Greater Melbourne

UDIA Victoria engaged MNG to undertake the 2025 NHP development constraints spatial mapping and analysis for the Greater Melbourne. The development constraints layers utilised were as follows:

Table 5: Land use categories used for aggregate land stocks assembly

Development Constraint Layer	Constraint Category
Floodway	Fundamental
Biodiversity/Conservation	Fundamental
Major Road Corridors	Fundamental
Education	Fundamental
Rail Reserves	Fundamental
Parks/reserves/POS	Fundamental
Power Easements	Fundamental
Utilities/services	Fundamental
Drainage	Fundamental
Waterways	Fundamental
Public Purpose	Additional
Bushfire Prone Areas*	Additional

*This layer was mapped and analysed but excluded from the analysis due the coarseness of the spatial layer. It will be re-examined for use in future NHP constraints mapping.

More technical details on the Greater Melbourne spatial mapping phase available on request. Please email Toby Adams: tadams@udiawa.com.au.

Appendix 1d: **Development Constraints Analysis**

Greater Perth

UDIA WA engaged MNG to undertake the 2025 NHP development constraints spatial mapping and analysis for the Greater Perth. The development constraints layers utilised were as follows:

Table 6: Land use categories used for aggregate land stocks assembly

Development Constraint Layer	Constraint Category
Wetlands	Fundamental
Creeks & Waterways	Fundamental
Floodways	Fundamental
Bush Forever	Fundamental
EPP	Fundamental
TEC	Additional
Bushfire Prone Land*	Additional
Private Recreation	Additional
State Forest	Additional
Parks & Rec	Additional
LPS-POS	Fundamental
School Sites	Fundamental
Major Roads	Fundamental
Rail Corridors	Fundamental
Rail Reserves	Fundamental
Gas Pipelines	Fundamental
Power Easements	Fundamental
Public Purpose	Fundamental

*This layer was mapped and analysed but excluded from the analysis due the coarseness of the spatial layer. It will be re-examined for use in future NHP constraints mapping.

More technical details on the Greater Perth spatial mapping phase available on request. Please email Toby Adams: tadams@udiawa.com.au.

Appendix 1e: **Development Constraints Analysis**

Greater Adelaide

UDIA SA engaged Alexander Symonds to undertake the 2025 NHP development constraints spatial mapping and analysis for the Greater Adelaide metropolitan region. The development constraints layers utilised were as follows:

Table 7: Land use categories used for aggregate land stocks assembly

Development Constraint Layer	Constraint Category
Hazards (Bushfire - High Risk)	Fundamental
Hazards (Flooding)	Fundamental
Limited Dwelling	Fundamental
Limited Land Division	Fundamental
Local Heritage Place	Fundamental
Major Urban Trasport Routes	Fundamental
Mount Lofty Ranges Water Supply Catchment (Area 1)	Fundamental
Mount Lofty Ranges Water Supply Catchment (Area 2)	Fundamental
Ramsar Wetlands	Fundamental
Significant Interface Management	Fundamental
State Significant Native Vegetation	Fundamental
Water Resources	Fundamental
Character Area	Additional
Gas and Liquid Petroleum Pipelines	Additional
Gas and Liquid Petroleum Pipelines (Facilities)	Additional
Hazards (Flooding - General)	Additional

More technical details on the Greater Adelaide spatial mapping phase available on request. Please email Toby Adams: tadams@udiawa.com.au.

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