Great Southern

Albany

Regional HotSpots Land Supply Update

October 2015

Department of Planning

Western Australian Planning Commission

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1 Regional HotSpots and the Urban Development Program

The Regional HotSpots series is prepared as a component of the Western Australian Planning Commission's (WAPC) Urban Development Program (UDP), which tracks and models land supply as per the requirements outlined in the *Planning and Development Act 2005*. The role of the WAPC includes developing models to better understand land supply and development, and to promote this understanding as part of the land use planning and development process and better align the provision of infrastructure.

The Regional HotSpots series assesses land for future residential, industrial and commercial uses, providing context for the land use planning and infrastructure provision required to meet demand across selected regional centres. The reports provide information on:

- demand drivers specific to each centre, including the major economic factors that influence employment and population growth, and therefore the demand for land and housing;
- zoned land supply for residential, commercial and industrial uses;
- development constraints;
- recent and future land development activity; and
- existing and required physical and social infrastructure.

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2 Executive summary

Through much of the latter part of the 20th century, the rate of population growth and urban expansion in Albany was modest compared to some of Western Australia's other regional centres. During the heightened economic growth and rapidly increasing property prices of the mid 2000s; however, demand for land and housing in Albany – like many Western Australian centres – increased sharply. Through that period, a limited stock of greenfield development sites contributed to a rise in house and land prices, and constrained the rate of urban growth.

In response, a series of local planning scheme amendments were approved, which bolstered the stock of land available for residential development. This facilitated a sharp increase in subdivision activity, with lots in applications and conditional subdivision approvals more than doubling from 2005 to 2007.

The increase in lot supply in the Albany urban area was not matched by population growth. During the two years to June 2008, final subdivision approval was granted to create 764 lots, while the population increased by just 498 residents. The number of lots proposed by developers during this time was even more pronounced, with applications lodged to create 3,448 lots and conditional approval granted to create 2,775 lots for residential purposes.

The low rate of population growth and the global financial crisis both contributed to a marked slow-down in local land development from 2008. Median house and land prices fell significantly during this period and although they have since partially recovered, median prices for 2014 were lower than they were in 2007.

In 2010, the *City of Albany Local Planning Strategy* was released, detailing a progressive long-term strategic vision for urban growth. Since the Strategy's release, various amendments have been made to the local planning scheme in areas identified for future urban expansion in the Strategy. These additions augmented the already substantial stock of land zoned for urban development around the Albany urban area.

Department of Planning analysis indicates that, based on forecast levels of population growth, there is currently an oversupply of land zoned for urban/residential purposes in Albany. The stock of land identified in this document for future urban development could theoretically support growth for up to 62 years. There is also substantial capacity for background development on existing vacant lots and through subdivision activity, as permissible under the R-Codes set out in the local planning scheme.

In addition to the future development areas identified in this report, there is also a substantial stock of land identified for future urban expansion in the *City of Albany Local Planning Strategy*, capable of yielding an estimated additional 17,810 dwellings. A stock of this size could theoretically provide sufficient housing to support population growth for several generations. Given the stock of land already zoned for urban uses, it is unlikely that the areas identified in the Strategy (not already zoned for development) will be required to meet underlying demand for an extended period.

Population forecasts prepared by WAPC indicate that the modest rate of population growth in Albany may well continue to 2026. However, trend-breaking events (typically those that create or deplete large numbers of jobs) can substantially alter the rate of population growth in regional communities. Albany has numerous competitive advantages with regard to export based industries, most notably its proximity to a wealth of natural resources and a deep water port. Capitalising on these assets to expand local industry has the potential to generate additional employment and increase the rate of population growth.

Perhaps the most significant single project proposed in the area, with regard to employment and population generation, is the Southdown magnetite mine, which has been postponed indefinitely due to unfavourable market conditions. It is, however, apparent that even if Southdown and other proposed projects were all to proceed, there is sufficient land available within the existing framework to meet demand for an extended period.

In addition to the city's stocks of residential land, there are numerous rural living style developments near the Albany urban area. Department of Planning analysis indicates that, since 1996, an average of 250 hectares (an area slightly larger than the suburb of Spencer Park (223 ha)) per annum of land in the City of Albany have been consumed through rural living development. Most of this development has occurred around the fringe of the Albany urban area. Analysis also suggests that there are sufficient stocks of land zoned for rural living to support this kind of development for some time – even at the current rate of land consumption.

Any additions to the stock of rural living land should therefore be considered cautiously, giving appropriate regard to the long-term land use implications and ensuring development is not overly supply driven.

There are several industrial areas around the Albany urban area with potential for expansion, however, given the scale of the area identified for future urban uses, it appears probable that additional areas will be required in the long-term (if development of those future urban areas is fully realised). Although there is no immediate requirement to rezone land for industrial purposes, it will be important to identify suitable sites early, to minimise future land use conflict.

Early identification of commercial land is not as critical as it is for industrial land as commercial developments can generally function near residential areas with relatively little disruption. Future commercial developments are often identified at the structure planning stage of the development process. In the short-to-medium-term there is sufficient land available to meet demand for commercial land, particularly given that two sizeable new shopping centres have recently been developed in Orana and Bayonet Head.

Perhaps the most important challenge with regard to planning for commercial growth, will be maintaining – or enhancing – the vibrancy of the Albany central business district, given the city's expansive residential areas and the growth of new suburban commercial centres.

Although a land supply shortage can constrain development, an abundant supply does not, in itself, generate growth. The development patterns of the past 10-15 years in Albany have resulted in an over-supply of land zoned for urban development. This can create difficulties in coordinating future urban growth and the efficient provision of key infrastructure. It also makes the delivery of a more compact urban form around activity centres challenging, given the sizeable supply of greenfield sites available for development.

Coordinating growth within the current local planning framework will therefore be a challenging endeavour and innovative planning solutions may be required to deliver optimal development outcomes. Any additions to the stock of urban (or rural living) land may exacerbate these challenges and should be considered with a healthy degree of caution, giving due regard to underlying demand.

3 Planning framework

3.1 State and regional planning

- The *State Planning Strategy*, released in 2014, provides an overarching strategic guide for land use planning across Western Australia.
- State Planning Policies are prepared and adopted by the WAPC under statutory procedures set out in part 3 of the *Planning and Development Act 2005*. The State Planning Policies are available through the PlanningWA website. Some of the most relevant State Planning Policies to land use planning and development in the Albany area include:
  - *State Planning Policy 2.5 Land Use Planning in Rural Areas;*
  - *State Planning Policy 3 Urban Growth and Settlement;*
  - *State Planning Policy 3.1 Residential Design Codes;*
  - *State Planning Policy 3.6 Development Contributions and Infrastructure*; and
  - *State Planning Policy 3.7 Planning for Bushfire Management*
- The draft *Great Southern Planning and Infrastructure Framework* (March 2014) addresses the scale and distribution of population growth, opportunities for economic development and associated infrastructure priorities in the region.
- The draft *Great Southern Regional Blueprint*, produced by the Great Southern Development Commission sets out an aspirational vision for growth in the region.
- The draft *Lower Great Southern Strategy*, produced by the Department of Planning in 2015, sets out the strategic direction for planning in the City of Albany and the Shires of Denmark, Plantagenet and Cranbrook for the next 20 to 30 years.
- The *Better Urban Water Management* document (2008) is designed to facilitate better management and use of our urban water resources by ensuring an appropriate level of consideration is given to the total water cycle at each stage of the planning system.
- The *Great Southern Regional Water Supply Strategy* projects water demand in the region to 2043, identifying water supply options to meet new demand and detailing actions to guide further planning, investigations and water source development.

3.2 Local planning

- The *City of Albany Local Planning Scheme No. 1* sets out the statutory framework for planning and development in the City of Albany.
- The local planning scheme is supported by various council policies, which are available through the City of Albany website.
- The *Albany Local Planning Strategy* (currently under review) identifies the strategic objectives for urban growth in the City of Albany.
- The *Community Strategic Plan Albany 2023*, produced by the City of Albany.
- The draft *Bushfire Hazard Mitigation Strategy* (March 2014) facilitates the integration of bushfire management measures into local government planning, development and land management processes.
- The *Activity Centres Planning Strategy* (endorsed by the City of Albany in June 2010) sets out the strategic direction of existing and proposed activity centres in the Albany urban area.
- The *Albany Central Area Masterplan 2010* sets out a 20-year vision for the development of the Albany town centre and surrounds.
- The *Albany Waterfront Precinct Plan* identifies five precincts in the Albany Waterfront area, outlining the vision, objectives and, planning and design guidelines associated with each of them.
- There are numerous areas in and around Albany with significant heritage value and as such it is advisable to inspect the City of Albany's *Municipal Heritage Inventory* as part of planning for any new development.

4 Population

4.1 Existing population

With an estimated resident population of 33,709 (as at June 2014), Albany is the only city in the Great Southern region and the fifth most populous urban area in Western Australia. The nearest larger cities are several hundred kilometres away on the State's west coast.

Through this document, population and other indicator data relating to Albany are discussed. Depending on the context and the source of the data, 'Albany' may refer to different geographical extents. For example, building approvals data refer to the City of Albany local government area, while income distribution data refer to the Albany urban area. A list of the various geographies used in this report to describe and compare the urban fabric of Albany is shown in Table 1.

Table 1: Local and regional geographic extents

Geography	Description	Population	Area km²
State (WA)	Refers to the State of Western Australia.	2,519,321	2,526,574
Great Southern region	The Great Southern region is comprised of 11 LGAs (including the City of Albany) in the far south of WA.	59,931	38,914
Local Government Authority (LGA)	The City of Albany is the most populous local government authority in the Great Southern region.	36,939	4,310
Significant urban area (SUA)	The Albany SUA refers to the Albany urban area, surrounding suburbs and hinterland and comprises four of the five SA2 areas that constitute the City of Albany (LGA).	33,709	297
Urban centre/locality (UCL)	The Albany UCL refers specifically to the Albany 'townsite' and does not include the surrounding suburbs and hinterland.	26,643*	82
Statistical Area Level 2 (SA2)	The City of Albany (LGA) is comprised of five SA2s, four of which make-up the Albany SUA.	-	-
Statistical Area Level 1 (SA1)	SA1s are the smallest geography for which the ABS publishes a broad range of information. There are 90 SA1 areas in the City of Albany.	-	-

Source: ABS (2014) *Catalogue 3218.0 & ABS* (2012) C*atalogue 2001.0 – Albany* (UCL)

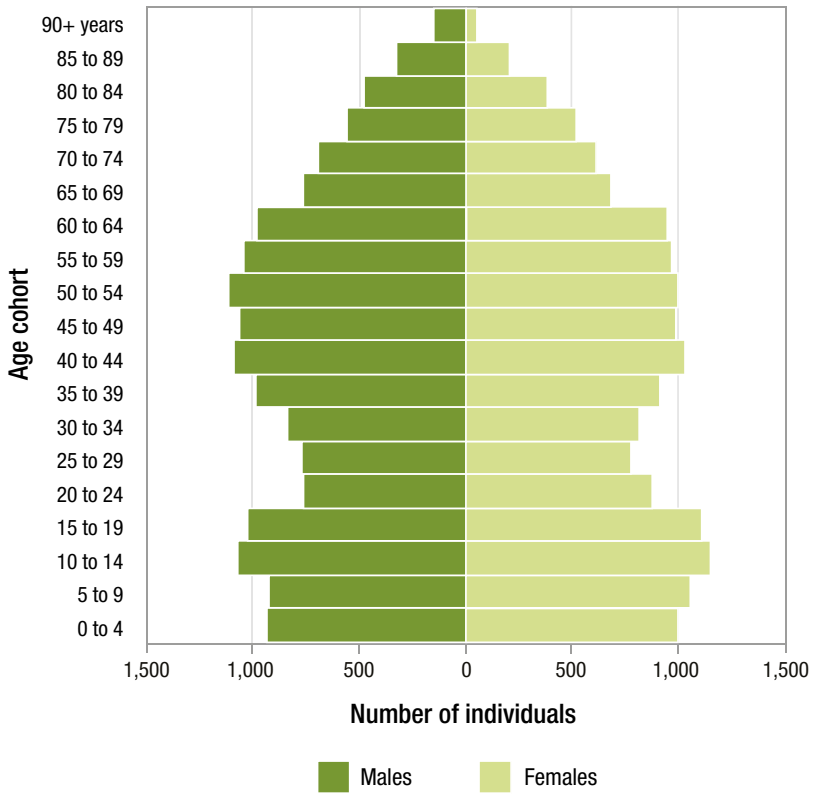
*Population is as at the 2011 Census, based on place of usual residence

Map 1 shows the population density of SA1 geographies in the Albany significant urban area (SUA).

Albany's population make-up differs substantially from that of Western Australia as a whole. Perhaps the most significant feature of Albany's demographic profile is its high proportion of older residents. A popular town with retirees, 24 per cent of Albany residents were aged 60 or older at the 2011 Census, compared to 18 per cent across the State.

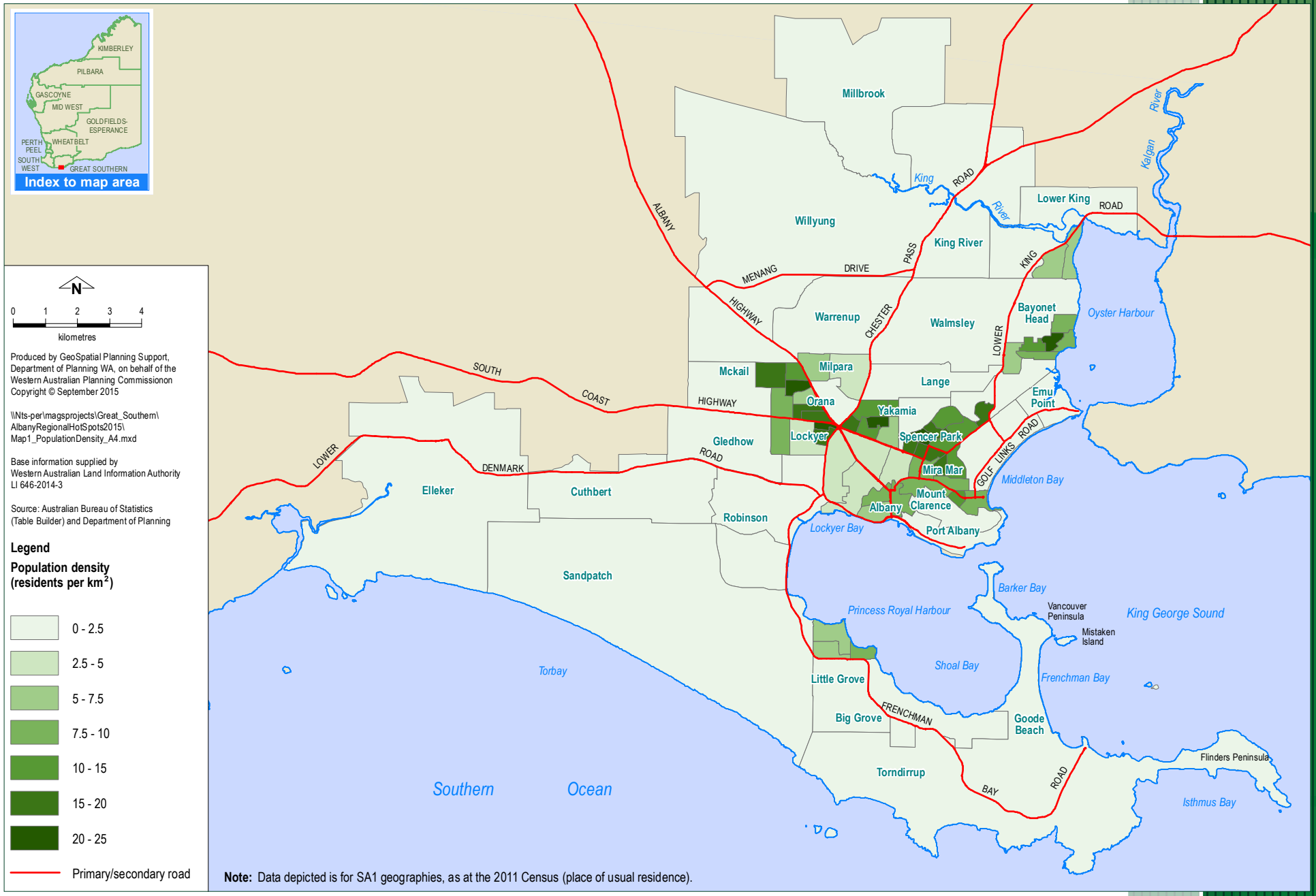
At the 2011 Census, young adults (aged 20-34) constituted 22 per cent of Western Australia's population, compared to just 16 per cent in the Albany significant urban area (Figure 1 and Figure 2).

Figure 1: Census 2011 Albany (SUA) population profile



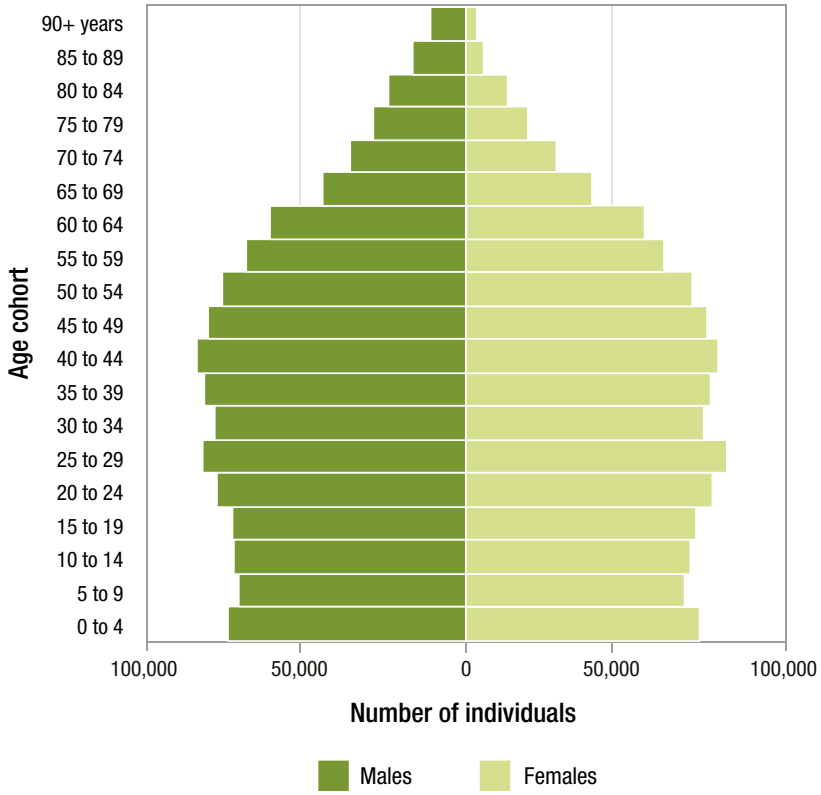
Source: ABS (2012) *Catalogue 2001.0 – Albany* (UCL)

Map 1: Population density – 2011 Census (SA1)



Note: Data depicted is for SA1 geographies, as at the 2011 Census (place of usual residence).

Figure 2: Census 2011 Western Australia population profile

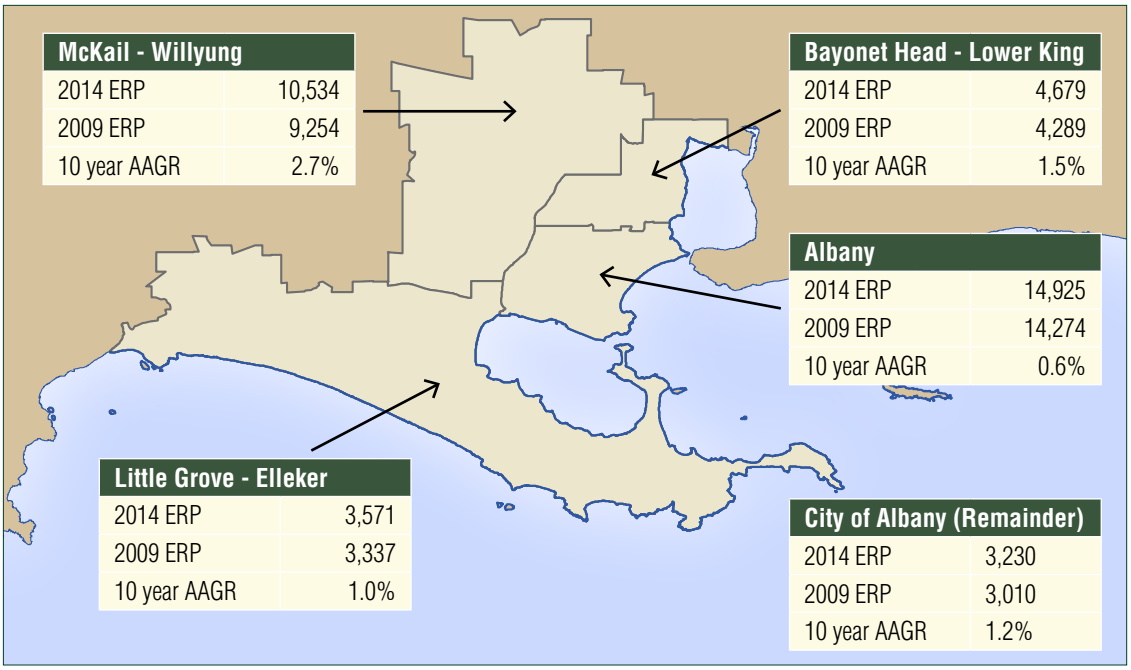


Source: ABS (2014) *Catalogue 3218.0*

4.2 Population growth

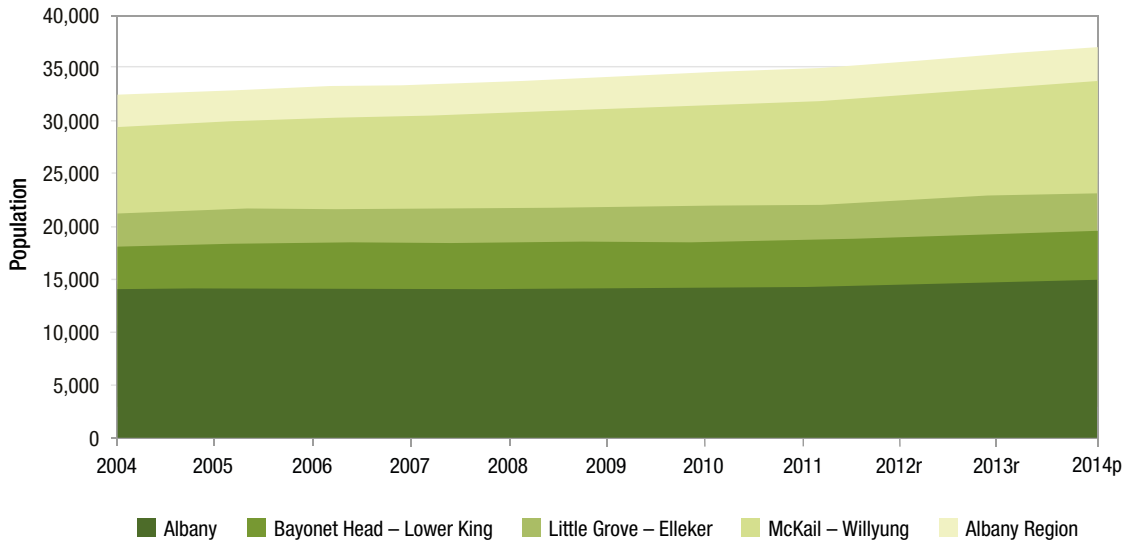
- Most of Albany's additional residents over the past 10 years have been accommodated in the urban expansion areas around the Albany urban centre, with 74 per cent of the total LGA population increase in the decade to 2013 occurring in the SA2s of Bayonet Head - Lower King, Little Grove - Elleker and McKail - Wilyung (Figure 3).
- With an average annual population growth rate of 1.4 per cent, the Albany significant urban area (SUA) experienced a substantially lower rate of population growth than Western Australia as a whole (2.7 per cent) over the 10 years to June 2014.
- In the 10 years to June 2014 Albany (SUA) had the slowest population growth rate (1.38 per cent per annum) of Western Australia's major urban areas apart from Kalgoorlie-Boulder (1.06 per cent per annum).
- Albany's importance as the main centre in the Great Southern has increased over the 10 years to 2014, with a consistently higher rate of population growth than the Great Southern region as a whole (Figure 5).
- If population growth in the Albany SUA is excluded from calculations, the remainder of the Great Southern Region has experienced an average annual growth rate of just 0.5 per cent per annum in the 10 years to June 2014. The population of several LGAs in the region declined over the period.

Figure 3: Population growth (SA2) - City of Albany



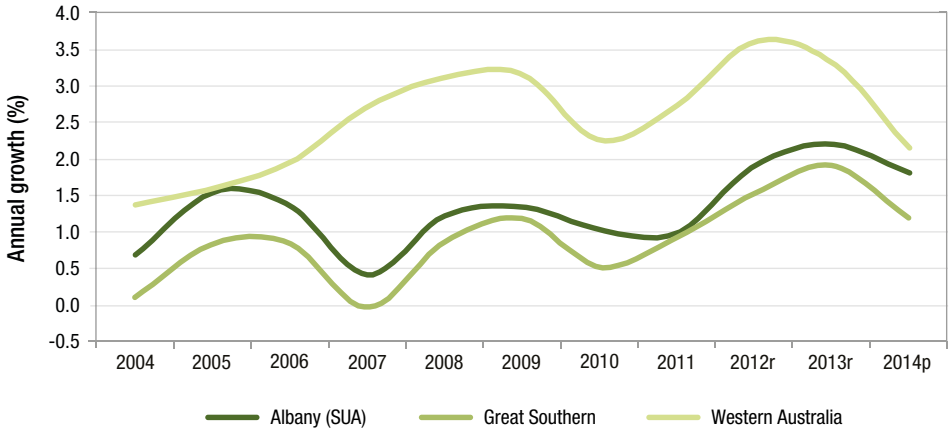
Source: ABS (2014) *Catalogue 3218.0*

Figure 4: City of Albany – estimated resident population



Source: ABS (2014) *Catalogue 3218.0*

Figure 5: Estimated resident population growth by year



Source: ABS (2014) *Catalogue 3218.0*

4.3 Population projections

WA Tomorrow forecasts, released in 2015, are prepared using 10,000 different permutations that emulate the variability in population change shown in historical data. Each permutation shows possible growth or decline in a population, based on five variables (birth rate, death rate, net interstate migration, net intrastate migration and net overseas migration) that occur to varying degrees in each simulation.

The range of *WA Tomorrow* forecasts are grouped into five 'bands', based on the projected rate of population change produced by each simulation. Each band includes one fifth of the permutations, with Band A representing the lowest quintile of projected population growth, Band C the median and Band E the highest. The *WA Tomorrow* documents publish the median value of each quintile to give five forecasts for each SA2 and local government area in Western Australia.

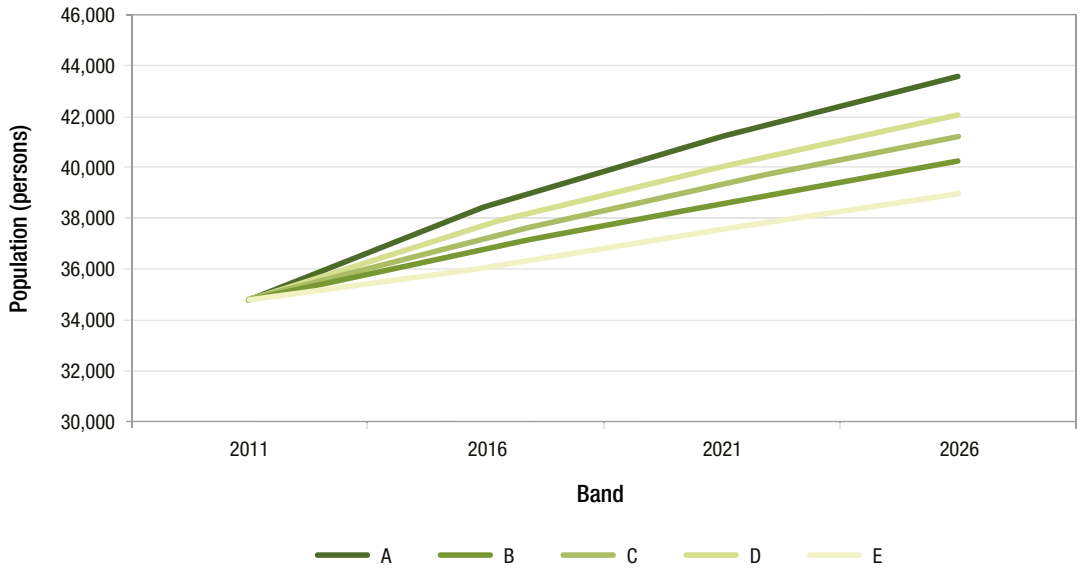
A more detailed description of the methods and outputs of the *WA Tomorrow* research is available from the PlanningWA website at www.planning.wa.gov.au/publications/6194.asp.

Figure 6 shows the median *WA Tomorrow* forecasts for Bands A-E for the City of Albany. The median Band C forecast for the City shows a population of 41,270 in 2026. Achieving this population (from a 2011 baseline) will require an average annual population increase of 425 residents, or an average annual growth rate of 1.13 per cent.

The median Band C growth scenario for the Albany (SUA) shows a similar growth trajectory (1.16 per cent per annum), achieving a population of 37,810 residents in 2026. The *WA Tomorrow* population forecasts for each of the five SA2 geographies in the City of Albany are shown in Figures 7-11.

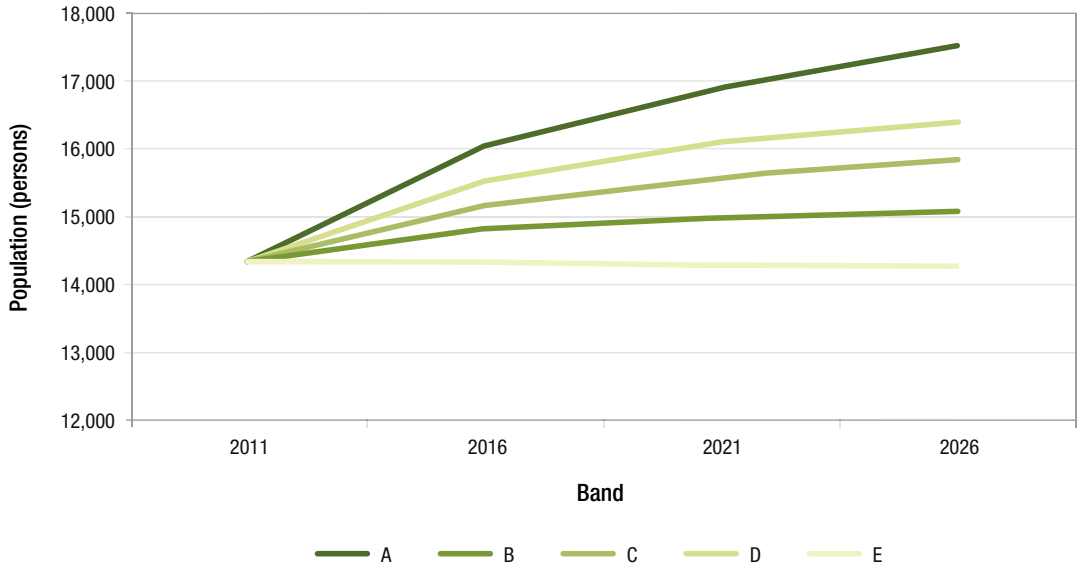
The largest Band C forecast population increase, at SA2 level, is for Albany (1,490 additional residents), followed by Bayonet Head - Lower King (1,330 additional residents). The highest forecast average annual population growth rates to 2026 (Band C) are for Bayonet Head - Lower King (1.77 per cent), McKail - Wilyung (1.52 per cent) and Little Grove - Elleker (1.28 per cent).

Figure 6: Forecast population growth – City of Albany (LGA) – Total



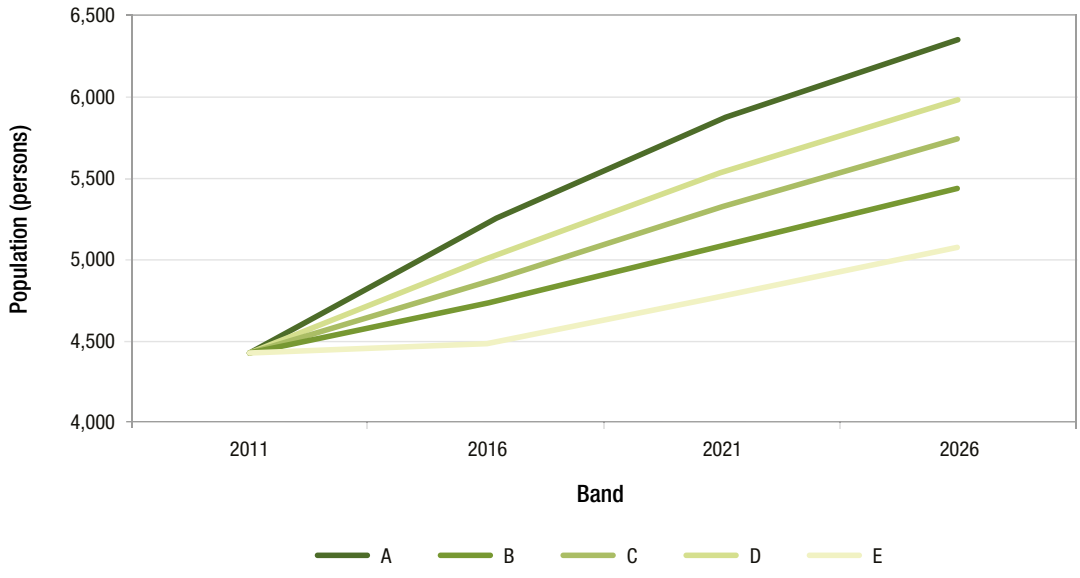
Source: WAPC (2015) *WA Tomorrow, Population Report No. 10*

Figure 7: Forecast population growth – Albany (SA2)



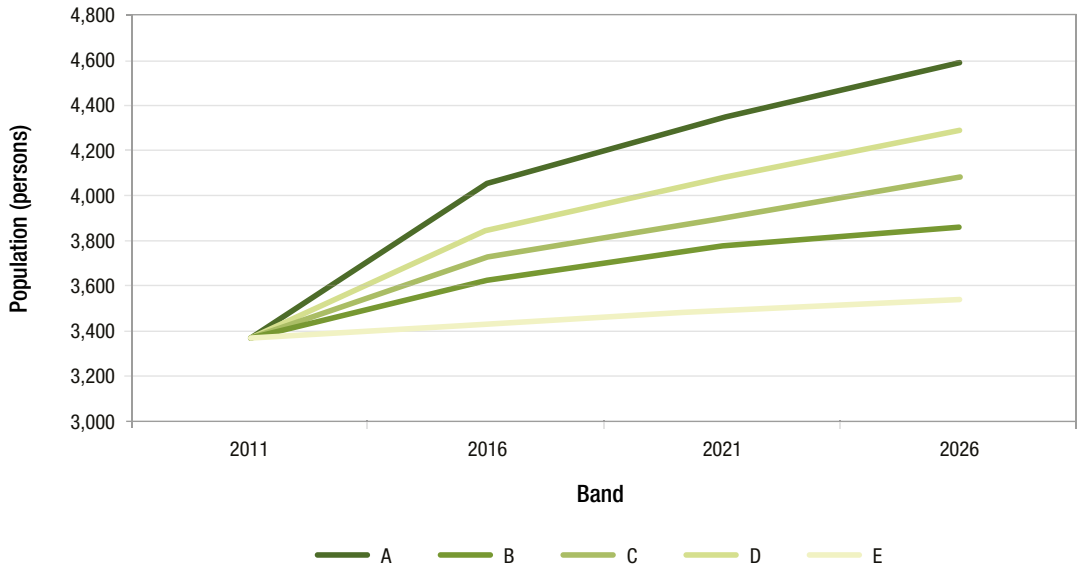
Source: WAPC (2015) *WA Tomorrow, Population Report No. 10*

Figure 8: Forecast population growth – Bayonet Head – Lower King (SA2)



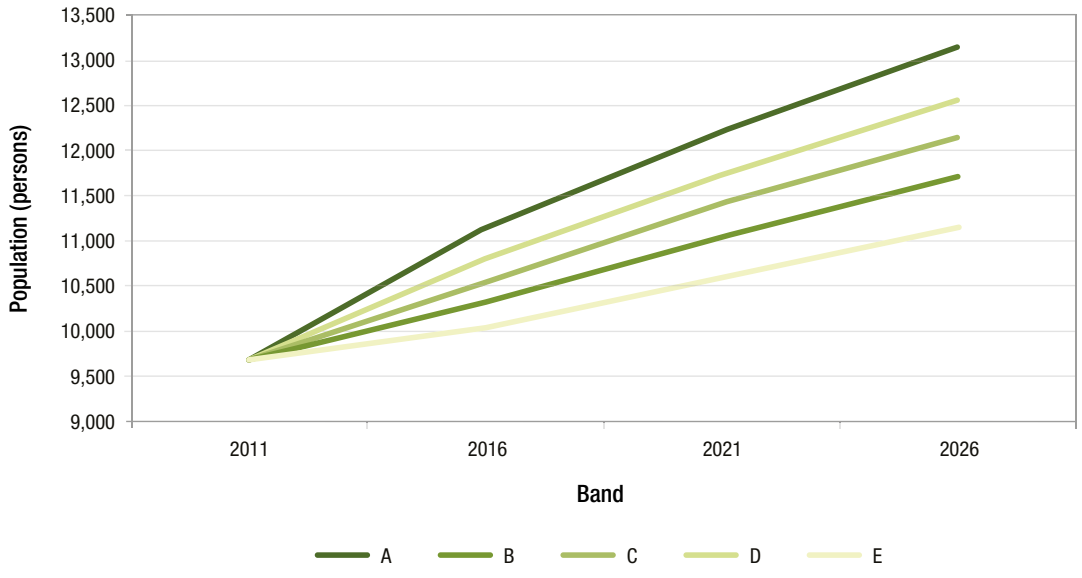
Source: WAPC (2015) *WA Tomorrow, Population Report No. 10*

Figure 9: Forecast population growth – Little Grove – Elleker (SA2)



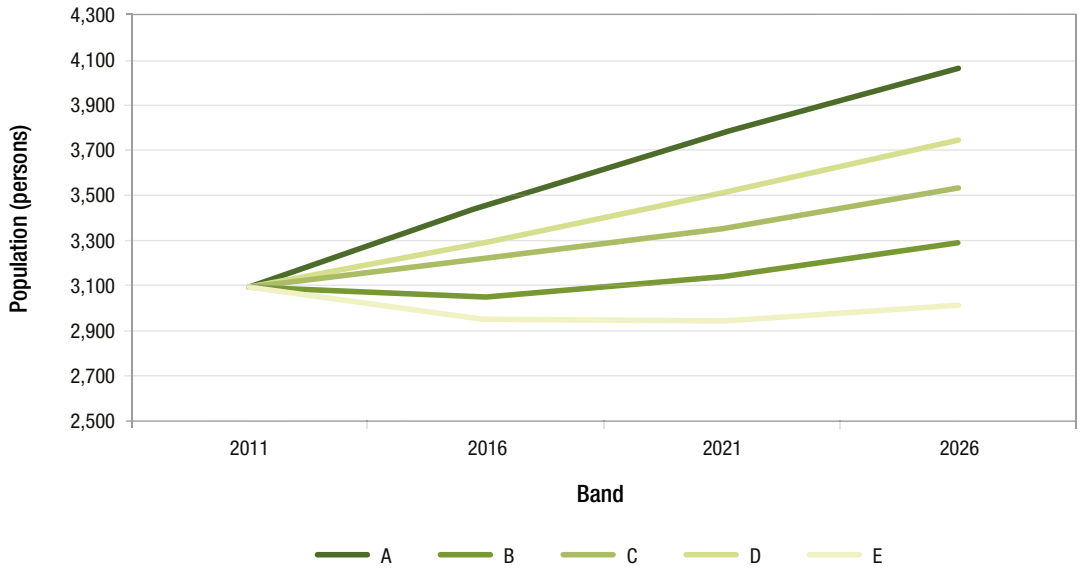
Source: WAPC (2015) *WA Tomorrow, Population Report No. 10*

Figure 10: Forecast population growth – McKail – Wilyung (SA2)



Source: WAPC (2015) *WA Tomorrow, Population Report No. 10*

Figure 11: Forecast population growth – City of Albany (remainder) (SA2)



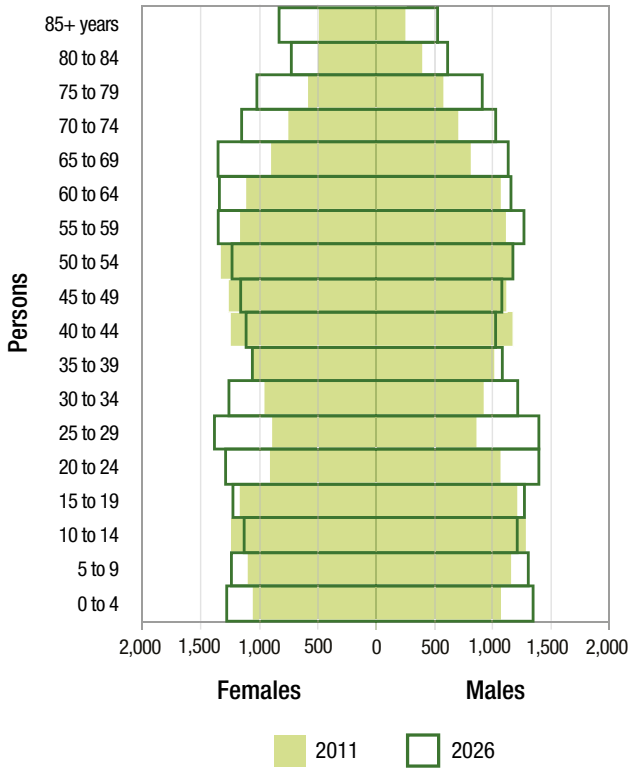
Source: WAPC (2015) *WA Tomorrow, Population Report No. 10*

The demographic profile of the City of Albany is forecast to change significantly by 2026. Figure 12 shows the population profile at the 2011 Census and the median Band C forecast for the City's population profile at 2026. The age cohorts that experience the greatest increase under this growth scenario are young children (aged less than 10), young adults (aged 20 -35) and residents aged 55 and over.

For the Great Southern region as a whole, the median *WA Tomorrow* population forecast for 2026 is 66,360. This would require an average annual population growth rate of 0.99 per cent per annum, which is in line with the rate of growth over the past decade. The draft *Great Southern Regional Blueprint* aspires to a significantly higher rate of population growth, envisaging a population of 100,000 in the region by 2040. This would represent an average annual population growth rate of almost two per cent (1.96 per cent) per annum.

Increasing the rate of population growth to a level comparable with that described in the draft *Great Southern Regional Blueprint* is likely to require substantial economic development. Typically, high rates of population growth are employment driven. The draft *Great Southern Regional Blueprint* sets out a series of industrial expansion objectives that, if achieved, would create large numbers of employment opportunities. The extent to which these projects and objectives are achieved is likely to play a major part in whether the Great Southern Development Commission's envisaged population for the region at 2040 is reached.

Figure 12: City of Albany demographic profile 2011 and 2026 forecast (Band C)



Source: WAPC (2015) *WA Tomorrow, Population Report No. 10*

4.4 Additional information

WA Tomorrow, Population Report No. 10: PlanningWA website: www.planning.wa.gov.au/publications/6194.asp

Australian Bureau of Statistics website: www.abs.gov.au

- Community profile
- Catalogue 3218.0
- Quick stats

City of Albany Community Profile: City of Albany (created by .id consultants): http://profile.id.com.au/albany

Great Southern Development Commission (2014) *Draft Great Southern Regional Blueprint*.

5 Economy and employment

Economic conditions and employment opportunities are fundamental drivers of population growth and demand for land and housing. This section describes key sectors of Albany's economy and provides a brief employment profile of the community.

5.1 Major industries and economic outlook

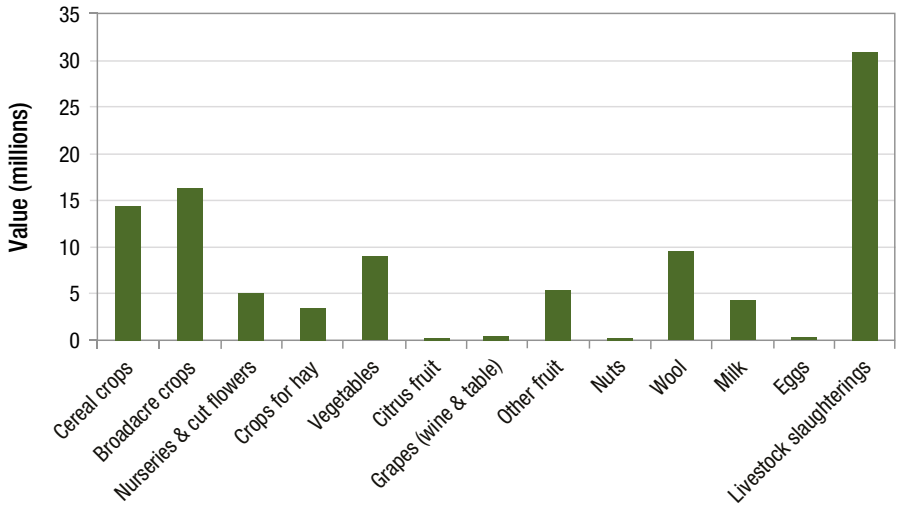
Primary production has for many years been the backbone of Albany's economy. Increasing employment and expanding local industry in the future will – to a large extent – involve adding value to locally produced goods, diversification and fostering more intensive forms of production, through activities such as aquaculture and horticulture.

Other sectors of the economy that are less reliant on primary production, such as tourism and education have potential for significant expansion; however, further development of these sectors is heavily influenced by broader national and international trends. A description of selected key industries in the Albany area is included in the following sections.

5.1.1 Agriculture

Albany is surrounded by some of the most productive farm land in Western Australia, with Great Southern regional agricultural production valued at $1.04 billion for the 2011/12 financial year, constituting 14 per cent of Western Australia's total agricultural production value. The most prolific agricultural industries in the region are sheep and grain production (Figure 13).

FIgure 13: Value of agricultural production – City of Albany



Source: Australian Bureau of Statistics (2012) *Value of Agricultural Commodities Produced, Australia, 2010-11.* Cat. No. 7503.0 (most recent data available)

Prospects for expansion may lie in the development of more intensive agricultural activities such as horticulture, which generally require a high degree of certainty regarding water supply. The prospect of additional horticultural production in the Albany region has the potential to create additional employment (both directly and through value adding industries) particularly in the context of growing global food security concerns. The draft *Great Southern Regional Blueprint* has set a target of doubling horticultural production in the Great Southern as a share of total gross annual agricultural production.

Royalties for Regions funded work is currently underway to identify potential groundwater reserves suitable for additional industrial and agricultural supply. The conclusions of this work may unlock latent water supply capacity in the region, enabling intensification of agricultural industries; however, any substantial expansion resulting from the work is unlikely to be undertaken in the short-term.

5.1.2 Fisheries

Fishing has long been an important part of the Albany economy. Commercial fisheries in the Albany region include catches of crab, lobster, abalone, cobbler, whiting, sea mullet, pilchards, salmon, herring, bream and shark. In addition to commercial fisheries, charter fishing operations out of Albany offer the opportunity to catch a variety of prize fish including snapper, dhufish and samson.

Aquaculture is a growing industry in the Albany area with land and sea based operations producing a wide variety of stock including abalone, marron, yabbies, mussels, oysters and aquarium fish. Albany is home to the largest single producer of mussels and oysters in Western Australia, with operations in Oyster Harbour taking advantage of nutrient rich terrestrial water run off to bolster production.

The responsible management of fish stocks in the Albany area means there is limited scope for the expansion of the wild fisheries sector. There are, however, substantial opportunities for the expansion of aquaculture and value adding industries in and around Albany. The draft *Great Southern Regional Blueprint* envisages a three-fold increase in the value of aquaculture and fishing production by 2040.

5.1.3 Commercial/retail

Albany is the regional service centre and major economic node of the Great Southern region. A wide range of business activities are undertaken in the town, including retail and wholesale trade, financial services, local government, real estate, hospitality and accommodation services. Albany is also a regional administrative centre for various State and Commonwealth agencies.

After agriculture, retail trade is the highest value sector in the Great Southern regional economy, worth approximately $610 million in the 2011/12 financial year. The region has a healthy small business community, with more small businesses per head of population than any other region of Western Australia.[1]

Commercial and retail demand in Albany is largely driven by the local community, with tourists also contributing to demand, particularly through the summer months. Expanding the sector will therefore be heavily dependent on population growth and increased volumes of tourist traffic. As the main urban centre in the Great Southern, the retail sector will also benefit from population growth elsewhere in the region within Albany's commercial catchment area. Commercial and retail sector growth may also be enhanced by improving local supply chain linkages to maximise the retention of resident and visitor spending.

5.1.4 Tourism

TourismWA estimates that during the three years to December 2013 an average of 470,300 people per annum visited the Great Southern region, staying for a collective total of almost two million nights. Most visitor nights during the period were spent by Western Australian residents (69 per cent), followed by international visitors (22 per cent) and interstate visitors (9 per cent).[2]

[1] Great Southern Regional Development Commission (2014) *Draft Great Southern Regional Blueprint*

[2] Tourism WA (2014) *Great Southern Development Commission Area – Overnight Visitor Fact Sheet 2011/12/13*

In 2013/14 total tourism and hospitality sales in the City of Albany amounted to $166 million adding approximately $75 million in net value to the local economy. Direct employment in the sector for the year is estimated at 785 with total employment generated estimated at 1,157 workers (1,127 FTEs).[3] At the 2011 Census, 892 Albany (SUA) residents stated that they were employed in accommodation and food services industries.

As depicted in Figure 14, the hotel occupancy rate in Albany is more variable than the rate for Western Australia as a whole. This variation in demand for hotel accommodation is reflected across the sector, creating significant variations in workforce requirements through the year.

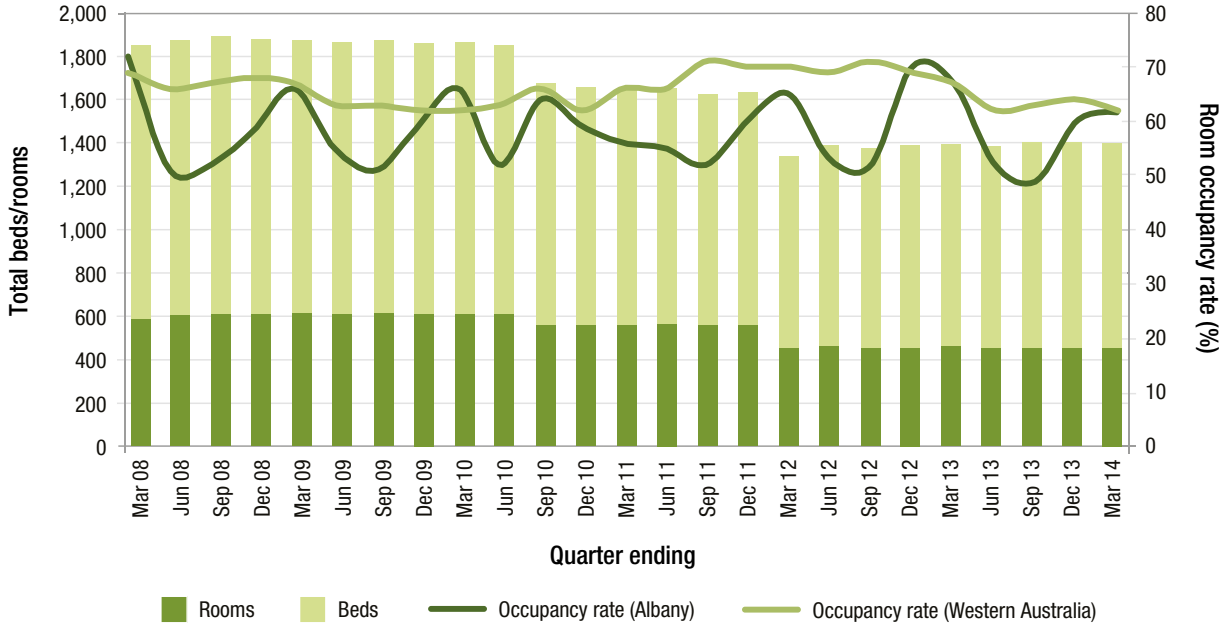
As the main urban centre of the Great Southern, Albany is able to tap into the appeal of the broader region to bolster the local tourism sector. Encouraging more tourists to the region and maximising the length of their stay in Albany will drive growth in this sector. The *Great Southern Regional Blueprint* envisages tourism becoming an increasingly important part of the regional economy, growing to 20 per cent of regional turnover.

5.1.5 Mining

Mining is an important component of Albany's economy. At the 2011 Census, 242 residents of the City of Albany stated that they were employed in the mining industry, with 153 people stating that they worked in the Pilbara. Rio Tinto offers a fly-in-fly-out roster to employees commuting from Albany Regional Airport to work at their Pilbara operations.

Local extractive industries include gravel, limestone, sand, hard stone (such as granite and dolerite) and silica sands. Resources are generally used locally, apart from silica sand which is generally exported. In 2014, 141,000 tonnes of silica sand were exported through Albany Port.

FIgure 14: Hotel occupancy rates – Albany and Western Australia



Source: Australian Bureau of Statistics (2014) *Tourist Accommodation, Small Area Data, Western Australia: Catalogue 8635.5.55.001*

[3] National Institute of Economic and Industry Research (NIEIR) 2015. Compiled and presented in economy.id by .id http://economy.id.com.au/albany/tourism-value

Grange Resources has undertaken a feasibility study to develop a magnetite deposit located to the east of Albany near Wellstead. The original proposal for the project sought to extract 10 million tonnes of ore per annum, for export via Albany Port. Mine and port environmental permits have been secured for the project but the reduced price for iron ore has delayed works until market conditions sufficiently improve. It is thought that the project may create up to 2,000 jobs during construction and 600 jobs once operational.

Should the Grange Resources project proceed, it will arguably create more employment than any other single project currently proposed. Aside from the direct employment opportunities, there will be numerous opportunities for the development of service industries and, indirect employment and population growth generated through the project.

5.2 Workforce

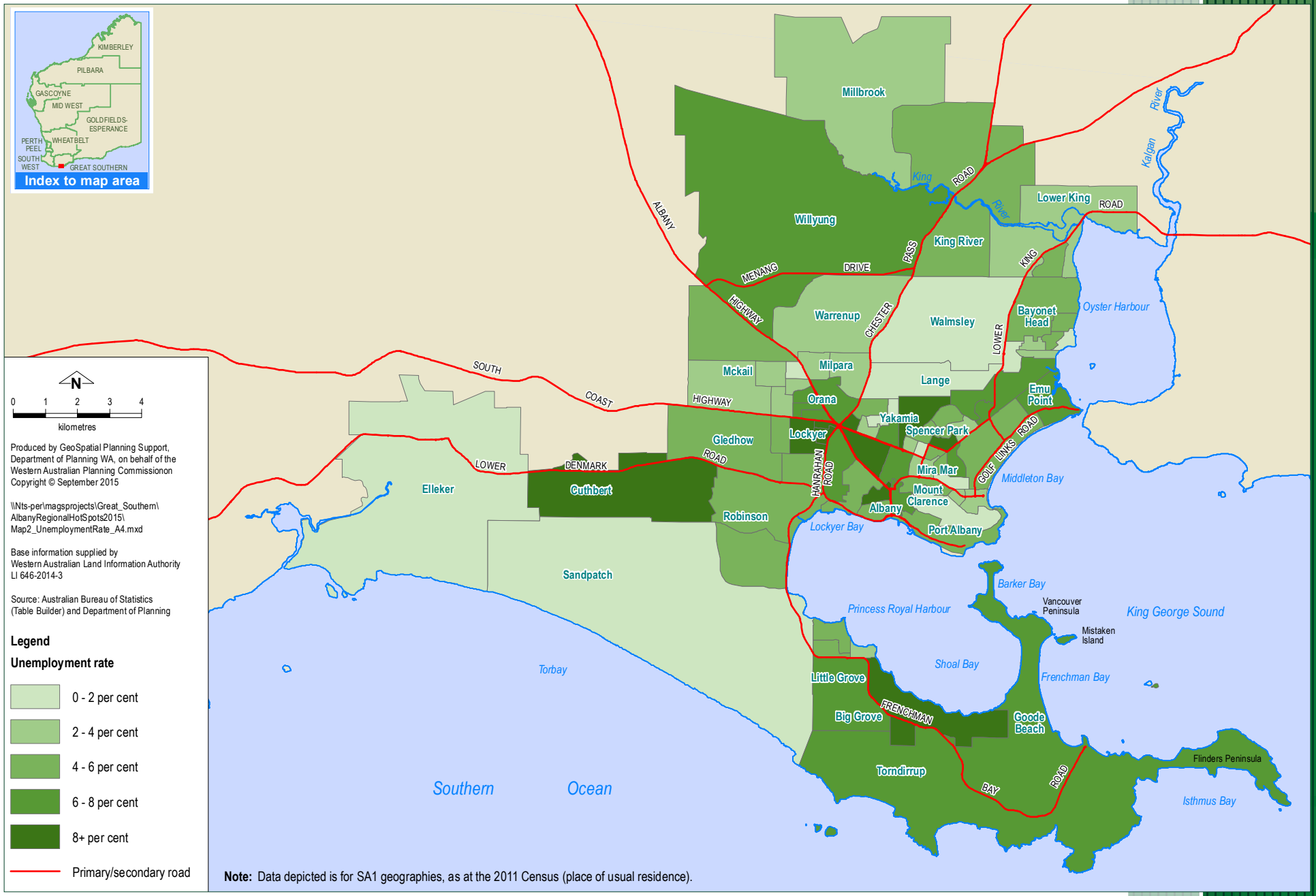
Since December 2010 the rate of unemployment in Albany has generally been slightly less than the rate for Western Australia as a whole (Figure 15). In December 2014, the rate for Albany (LGA) was 3.8 per cent, compared to 5.1 per cent for Western Australia. Map 2 shows the distribution of unemployed residents of SA1 areas across the Albany SUA.

Although the unemployment rate in Albany is low, relative to the rate for Western Australia, the City's labour force is small relative to the town's population. At the 2011 Census, the labour force participation rate in Albany was 58.7 per cent per cent, compared to 64.0 per cent for Western Australia. This reflects the low proportion of working age residents depicted in Figure 1 of this document.

Figure 15: Unemployment rate – Albany and Western Australia

Source: Department of Employment (2015) *Small Area Labour Market data*

Map 2: Rate of unemployment – 2011 Census



Note: Data depicted is for SA1 geographies, as at the 2011 Census (place of usual residence).

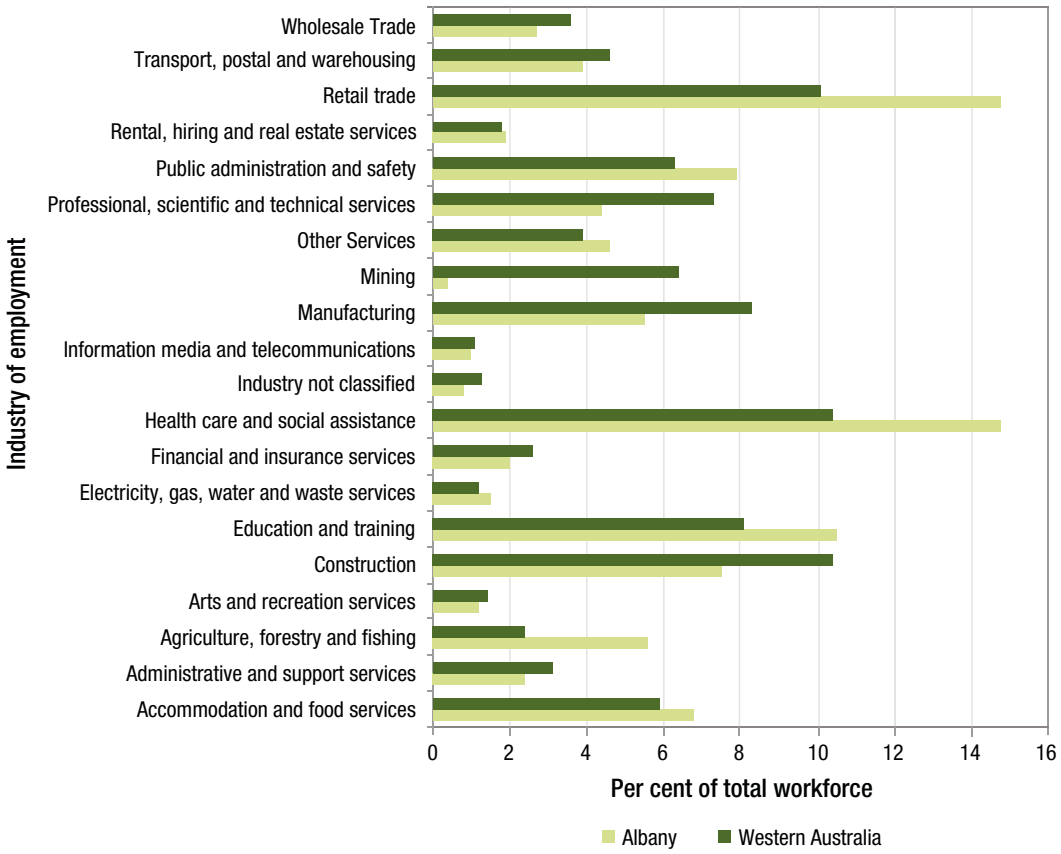
5.3 Industry of employment

Employment data for Albany reflects the city's role as the main service centre for the Great Southern region. At the 2011 Census, a relatively high proportion of residents worked in the retail, education and training, and health care and social assistance sectors (Figure 16). A substantial number of residents are also employed in the agriculture, forestry and fisheries sector.

5.4 Income

At the 2011 Census, the median personal income for Albany (SUA) residents aged over 15 years was $520 per week, substantially less than the median for Western Australia as a whole of $662 (Figure 17).[4] Many of the Albany residents earning more than $2,000 per week worked in the mining, construction or healthcare and social assistance sectors.[5] Within Albany (SUA), incomes tended to be higher for residents living near the central business district, or Middleton Beach (Map 3).

Figure 16: Industry of employment – Albany and Western Australia

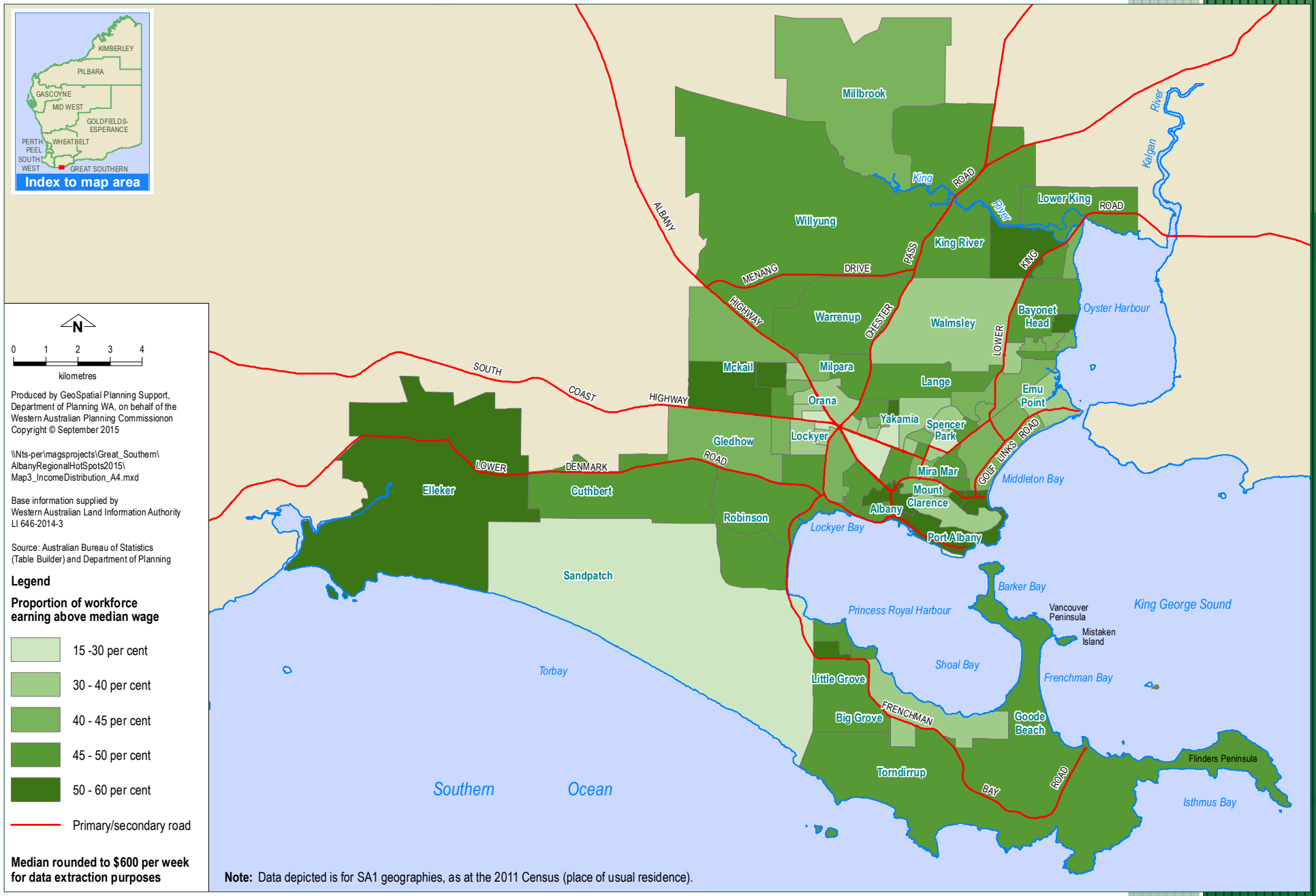


Source: Australian Bureau of Statistics (2012) *Basic Community Profile – Albany (SUA) Catalogue 2001.0*

[4] Australian Bureau of Statistics (2012) *QuickStats*

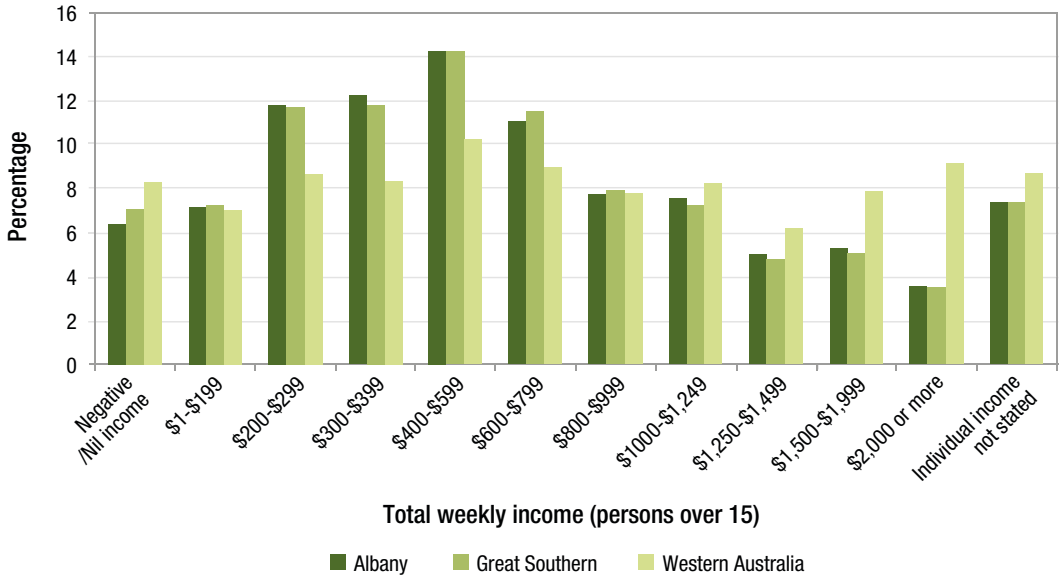
[5] Australian Bureau of Statistics (2012) *Table Builder*

Map 3: Income distribution – 2011 Census



Note: Data depicted is for SA1 geographies, as at the 2011 Census (place of usual residence).

Figure 17: Income distribution – Albany, Great Southern and Western Australia (2011 Census)



Australian Bureau of Statistics (2012) *Basic Community Profile – Catalogue 2001.0*

5.5 Regional Price Index

The Regional Price Index (RPI) – funded through the State Government's Royalties for Regions Program – is produced by the Department of Regional Development. The project compares location-based prices for a common 'basket of goods' to create a spatial index measuring prices against the Perth metropolitan area, which has an index value of 100 for each category.

RPI data comparing Albany and the broader Great Southern region to the Peth metropolitan area are shown in Table 2. While comparisons show that most living costs in Albany are reasonably consistent with those experienced in Perth, there are some notable exceptions.

Housing costs in Albany and across the Great Southern are typically substantially lower than they are in the Perth metropolitan area. The Great Southern recorded the lowest housing index value of any region in Western Australia in 2013; with a value of 85.6 (the South West was next lowest with 95.0). While housing can be inexpensive in Albany, health and personal costs are generally higher, with this commodity recording an index value of 110.8 in 2013.

5.6 Additional information

- Great Southern Development Commission Website: www.gsdc.wa.gov.au
- Great Southern Workforce Development Plan www.dtwd.wa.gov.au
- Albany Port Authority. Website: www.albanyport.com.au
- Albany Gateway. Website: www.albanygateway.com.au
- Regional Price Index www.drd.wa.gov.au/publications/Documents/Regional_Price_Index_2013.pdf
- TourismWA *Great Southern Development Commission Area – Overnight visitors fact sheet*
- City of Albany Economy Profile: City of Albany (created by .id consultants): http://profile.id.com.au/albany

Table 2: Regional Price Index

	Index numbers 2011		Index numbers 2013	
	Great Southern	Albany	Great Southern	Albany
Basket	100.2	99.9	97.6	97.1
Food	101.1	101.6	102.4	101.8
Cigarettes, tobacco, alcoholic drinks	103.2	103	101.2	101
Clothing	107.2	104.5	104.9	102.8
Housing	95.5	94.9	86.6	84.2
Household equipment and operation	105.9	105.2	100.9	100.9
Health and personal	103.6	103.7	111.2	110.8
Transport	100.6	100.3	100	99.8
Recreation and education	99	98.8	103.9	105.2

Source: Department of Regional Development (2014) *Regional Price Index 2013*

Note: Perth metropolitan area = 100; and the *Basket* of Goods used in the 2013 Regional Price Index (RPI) is based on the commodity categories used by the Australian Bureau of Statistics in the compilation of the Consumer Price Index (CPI).

6 Residential land and housing

6.1 Existing housing stock

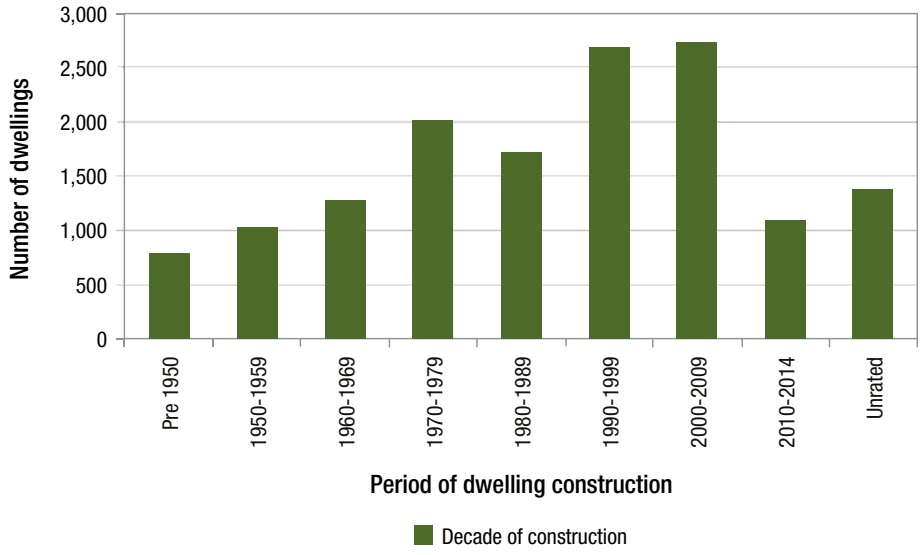
At the 2011 Census, a stock of 13,658 dwellings was recorded in Albany (SUA). Of these, 16.2 per cent were unoccupied, which is significantly higher than the rate for Western Australia as a whole (12.1 per cent). This is likely to be related to the large number of dwellings in Albany used as holiday homes.

Although it is one of the oldest towns in Western Australia, almost half of the town's dwellings have been constructed since 1990, with much of the older stock located near the town centre (Figure 18). Many of the new dwellings have been built near the town's fringe in areas such as McKail, Orana and Bayonet Head (Map 4).

As at the 2011 Census, most dwellings in Albany (88.1 per cent, compared to 80.4 per cent for Western Australia) were detached houses, with three bedroom dwellings being the most common size (Table 3).

Slightly more than half of the dwellings in Albany (51.9 per cent) had only one or two residents, which suggests a mismatch between the stock and occupancy rates. There may, therefore, be opportunities for the development of more diverse housing products including apartments and smaller dwellings in Albany.

Figure 18: Age of dwelling stock – Albany (SUA)



Source: Department of Planning (2015) *Integrated Regional Information System*

Map 4: Decade of construction

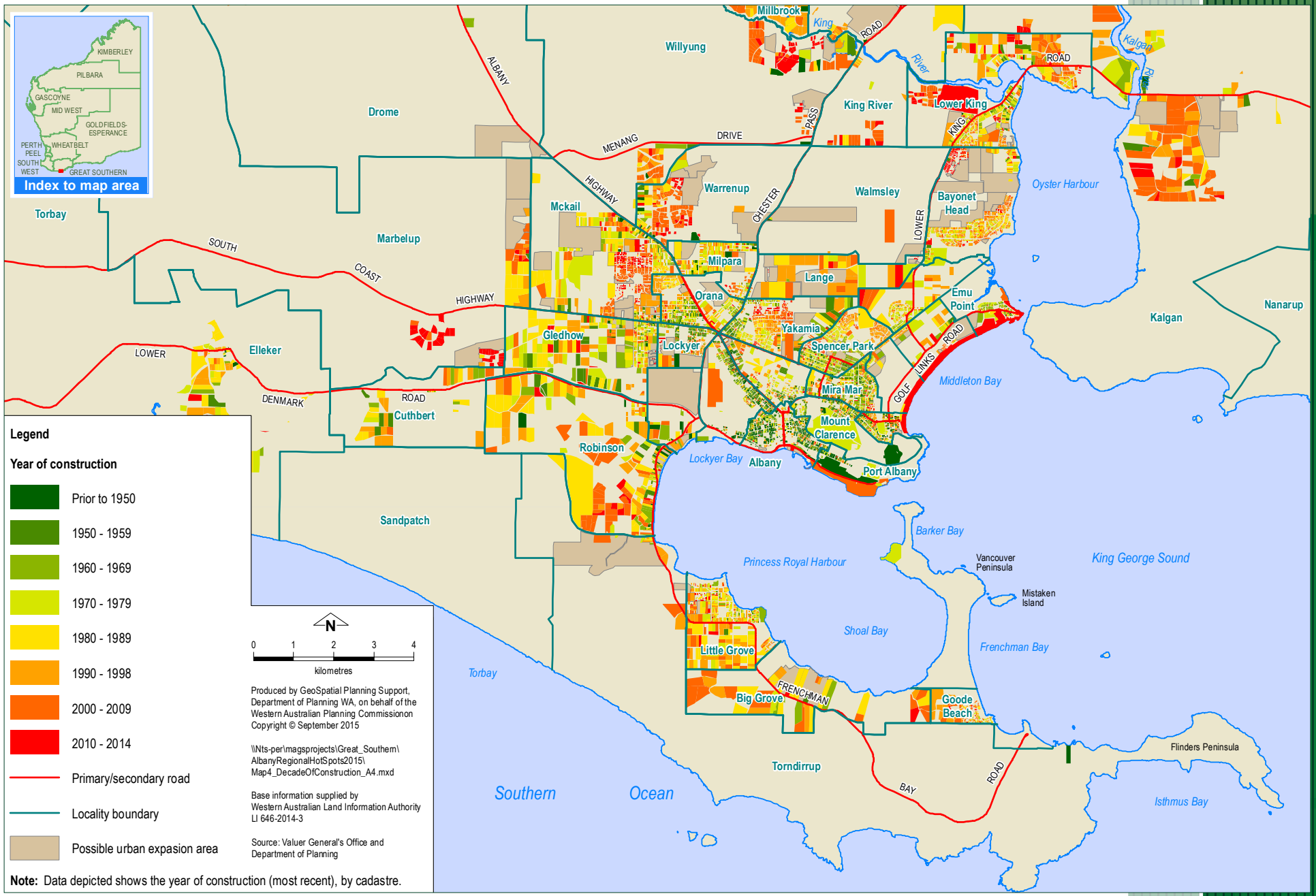


Table 3: Dwelling stock and number of residents – Albany (2011 Census)

	Number of residents								
	1	2	3	4	5	6	7	8+	Not applicable
None (includes bedsitters)	14	4	3	3	0	0	0	0	20
One bedroom	348	70	5	5	4	0	0	0	32
Two bedrooms	829	579	114	51	9	0	0	0	36
Three bedrooms	1,357	2,243	788	615	181	41	9	5	83
Four bedrooms	365	1,197	590	726	369	119	24	24	45
Five bedrooms	27	93	78	78	72	58	15	5	7
Six bedrooms or more	9	24	16	12	12	8	3	7	3
Not stated	154	48	20	8	5	7	0	0	257
Not applicable	0	0	0	0	0	0	0	0	2,261

Source: Australian Bureau of Statistics (2012) *Table Builder - Dwelling type, number of bedrooms & dwelling type, number of residents*

6.2 Albany property market

As was the case through much of Western Australia, house prices in Albany rose sharply through the middle part of last decade. The median house price in Albany more than doubled during that period, increasing from $192,750 in 2004 to $415,000 in 2007.

The increase in house prices during this period was not matched by population growth, which suggests that price increases were driven by the favourable economic conditions of the time. The Albany (SUA) estimated resident population increased by an average of approximately one per cent per annum in the four years to June 2007, which is marginally below the long-term trend and was among the slowest average annual growth rates of Western Australia's main urban centres during that period.

The median house price slumped after 2007; decreasing by approximately 12 per cent over the two years to 2009. The general trend of decline continued until 2013 and 2014 (when consecutive modest gains were experienced); however, as at 2014, the median house price was still significantly (approximately 10 per cent) below the 2007 level. Figure 19 shows that, during the period of rapidly increasing prices to 2007, Albany prices were tracking a similar trajectory to those in the Perth metropolitan area. Since 2007, the difference between median prices in the two centres has widened considerably.

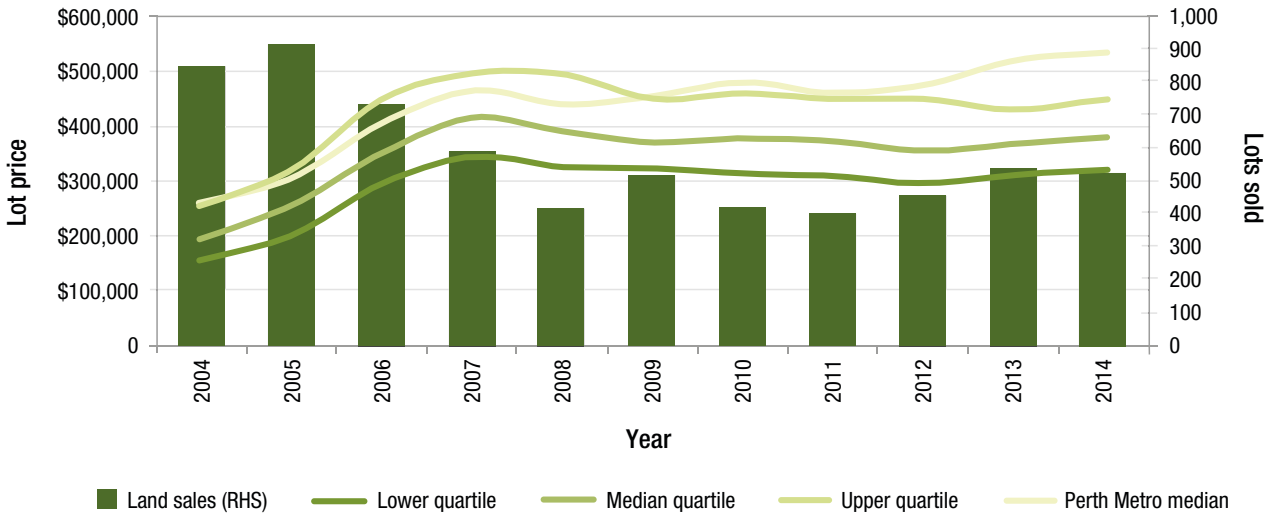
REIWA define units as attached grouped dwellings such as apartments of flats (see glossary for full description). An average of just five units per annum were sold by REIWA member agents in the decade to December 2014 (Figure 20). Although sales activity has been limited, the median sales price peak ($370,000 in 2006, when nine units were sold) was around the same time as for house prices and has also not since fully recovered.

The median residential lot price in Albany increased nearly three-fold, from $74,000 in 2004 to $213,000 in 2007. Since the global financial crisis, however, the median value of lots in Albany has remained lower than it was during the housing boom, with the median price in 2014 being 25 per cent lower than in 2007. In 2014, the median price of a residential lot in Albany was 60 per cent of the median lot value in Perth (Figure 21).

At the end of 2014, there were 790 residential properties listed for sale with REIWA agents in Albany (including 315 lots). The only regional urban centre to have more listings at that time was the considerably more populous Bunbury urban area (922 listings, including 154 lots). The average selling time for properties in Albany during the December quarter 2014 was 140 days, which was much longer than the average time in Perth (57 days) and in Bunbury (98 days).

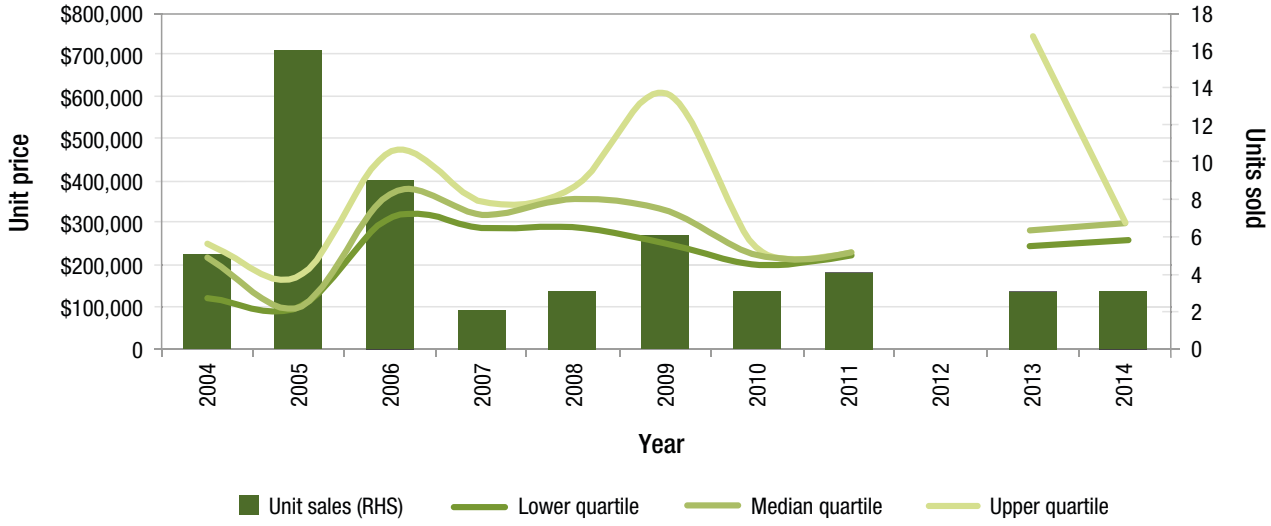
Around Albany (SUA) property values vary considerably, as depicted in Map 5. In general, however, REIWA data suggest that demand for residential property has been relatively soft in Albany since the late-2000s. Although median prices for lots, units and houses have increased recently, they are still not as high as they were during the housing boom. There are also large numbers of property listed for sale and the average number of selling days is substantially longer than for the State as a whole, suggesting a buyers' market.

Figure 19: House sales – Albany Urban Area 2004 - 2014



Source: Real Estate Institute of Western Australia (2015)

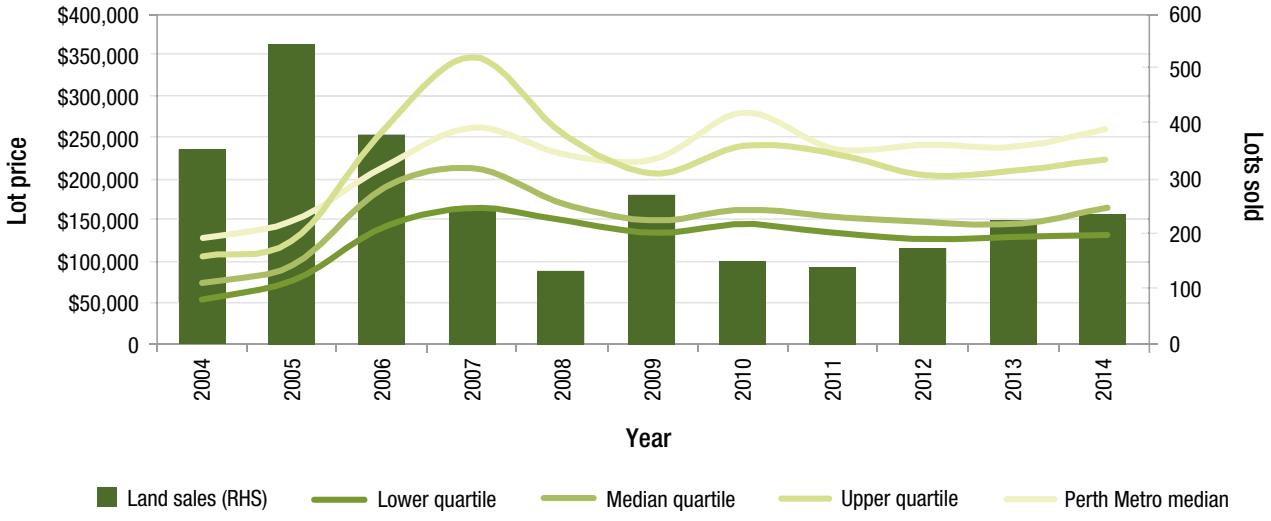
Figure 20: Unit sales – Albany Urban Area 2004 - 2014



Source: Real Estate Institute of Western Australia (2015)

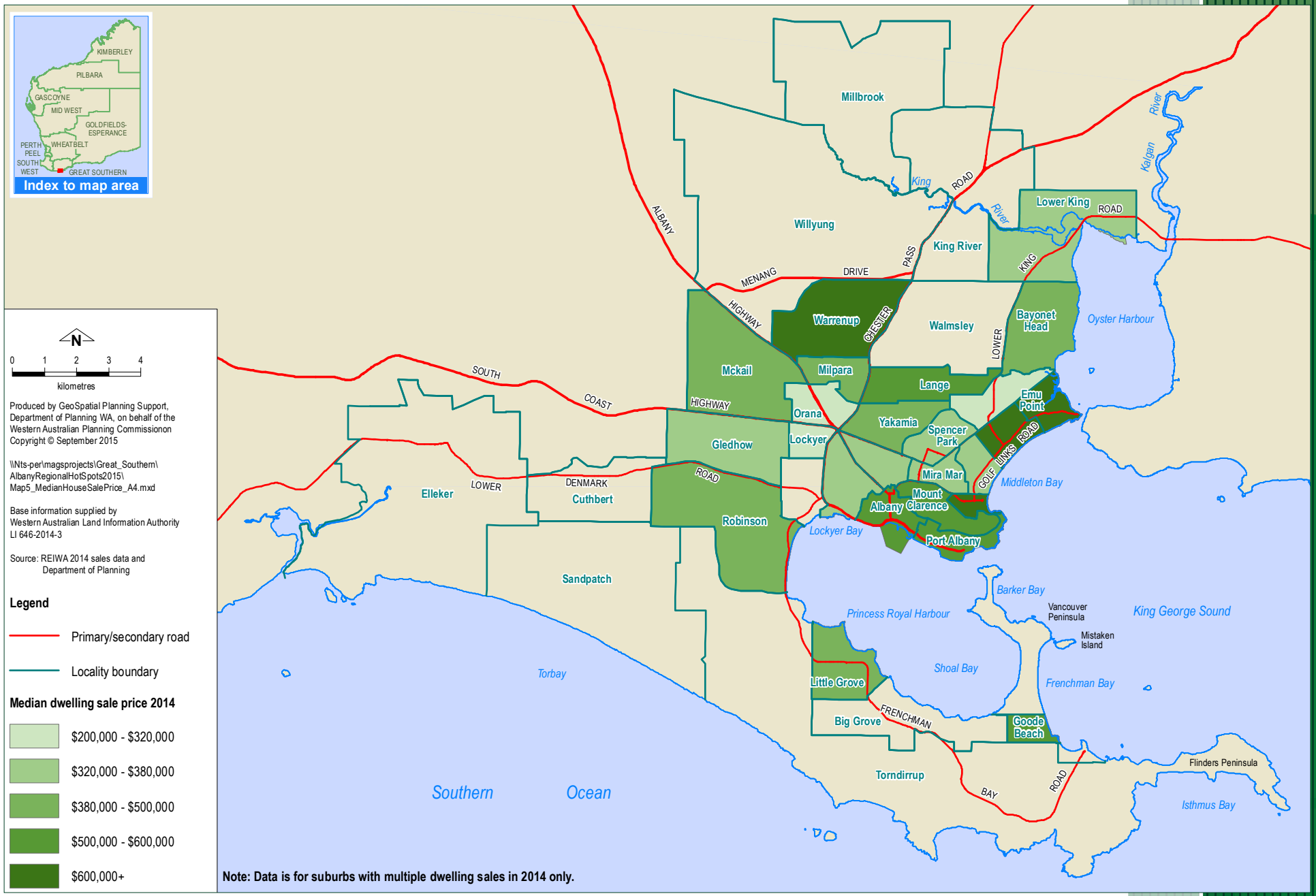
Note: No sales by REIWA agents were recorded in 2012

Figure 21: Residential lot sales – Albany Urban Area 2004 - 2014



Source: Real Estate Institute of Western Australia (2015)

Map 5: Median sales price



6.3 Land identified in the Albany Local Planning Strategy 2010

The *Albany Local Planning Strategy 2010* sets out the planning direction for the City's vision for future growth and provides a framework for the local planning scheme and more detailed precinct and structure planning. The Strategy identifies approximately 2,000 hectares of land for future urban development (expected to yield 28,500 dwellings), only a small fraction of which has since been developed.

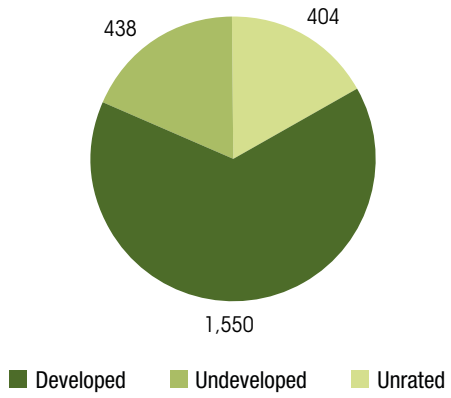
In addition to these areas, special residential and special rural expansion areas were identified, which have capacity for approximately 1,750 dwellings. A significantly greater proportion of these areas have been rezoned for their proposed purpose, however, substantial tracts remain undeveloped.

6.4 Land zoned for residential purposes

There are several land use zones under the City of Albany Local Planning Scheme that permit residential development (rural living residential land is discussed in a later section), including regional centre mixed use, residential and 'Yakamia Creek', with discretionary approval possible in tourist-residential and regional centre zones. Under the City of Albany Local Planning Scheme, residential development may also be undertaken on land zoned as future urban, if such development is in accordance with an endorsed structure plan.

Using the Integrated Regional Information System (IRIS) land supply model, major residential land use zones are grouped together to provide a snapshot of residential land stocks. As at January 2015, the model showed a stock of 2,392 hectares of land zoned for residential purposes, 1,550 hectares (65 per cent) of which was deemed to be developed (Figure 22). Based on the IRIS model, 842 hectares of residential land is either vacant or not rated by the Valuer General's Office. For the purposes of this document, unrated land, zoned for residential development is considered to be available for future development.

Figure 22: Stock of land (hectares) zoned for residential purposes – Albany (SUA)



Department of Planning (2015) *Integrated Regional Information System*

Using historical subdivision data and the IRIS model it is possible to calculate the amount of land zoned for residential purposes that is consumed, or developed (i.e. serviced with infrastructure and subdivided) each year. The results of this analysis showed considerable variation in development activity, with an average of 42 hectares of residential land in Albany consumed per annum (Figure 23).

In addition to the stock of undeveloped and unrated land in Albany, a substantial number of lots may be considered underdeveloped. Based on the IRIS land supply model for this study, a lot is considered developed if it contains a rateable building, no matter how large the lot may be. By this rationale, numerous lots identified for future urban development are already considered developed under the IRIS model due to an existing structure such as a farm house.

Further analysis showed that almost half (734 hectares) of the land zoned for residential purposes, considered developed under the model, consists of lots greater than 2,000m^2. Lots of this size would generally not be considered fully developed – for residential purposes.

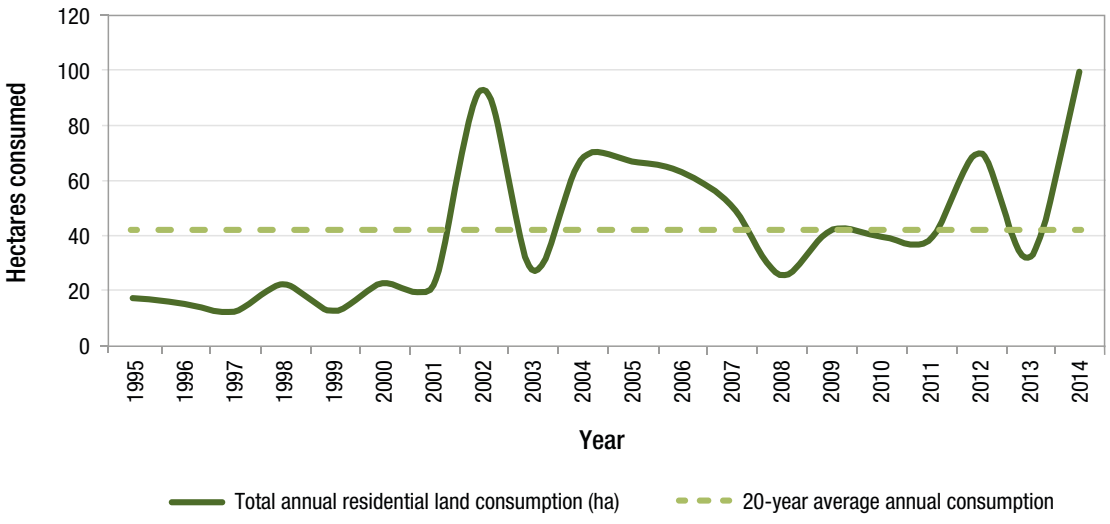
6.5 Urban consolidation and infill

The Department of Planning's Integrated Land Information Database (ILID) compares density outcomes with those prescribed by the R-Codes under local planning schemes. Using the ILID model, the latent development capacity of residential land stocks can be measured based on existing lot size and R-Code zonings. The ILID model outputs for residential land in Albany are shown in Table 4. The table shows ILID outputs for all areas with an R-code within Albany (SUA).

The 'lot potential' columns in Table 4 show the number of lots that could theoretically be produced by adding to the stock of residential lots through subdivision, as permissible under the R-Codes set out in the local planning scheme. Where there is a split code (i.e. R30/50) the potential is shown for both the high and low codes.

The 'additional dwelling potential' columns show the sum of possible net dwelling gains for each lot within each R-Code category. For example, a single 1,000m^2 lot with one dwelling in an area zoned R20 under the local planning scheme can be developed with two dwellings and would therefore contribute a value of one to the additional dwelling potential for lots zoned R20.

Figure 23: Residential land consumption – Albany (SUA)



Source: Department of Planning (2015) *Integrated Regional Information System*

The spatial distribution of lots with additional dwelling potential is shown in Map 6. The map shows that there are numerous lots with potential for 1-2 additional dwellings under the local planning scheme in and around the town centre. Toward the urban fringe there are many lots shown as dark green on the map with more substantial development potential; however, some of these areas require construction of reticulated wastewater systems before they can be developed to their potential (as prescribed by the R-Codes).

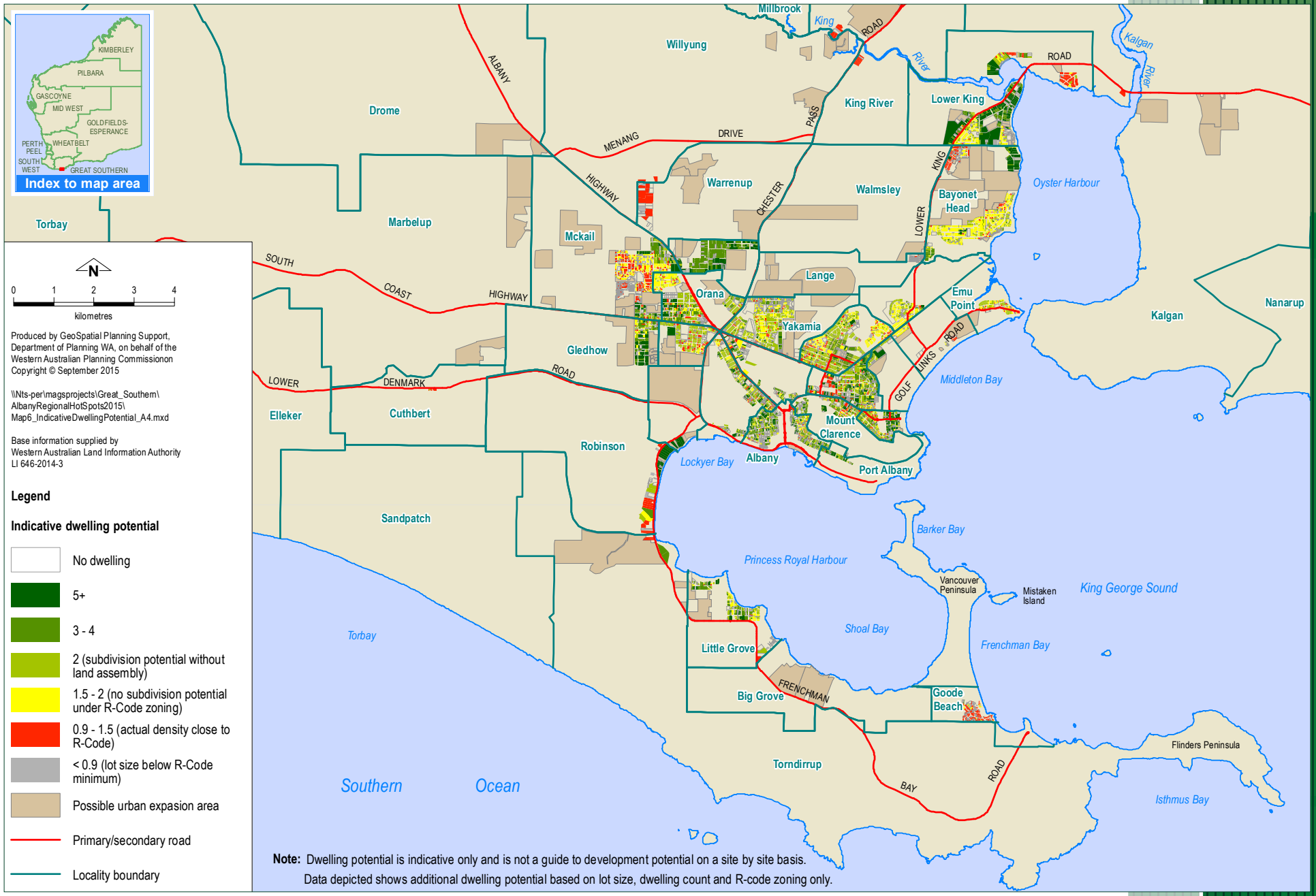
It must be noted that the data depicted in Map 6 is indicative only and should in no way be used as a guide to development potential on a site-by-site basis. The model does not take into account factors such as heritage, or environmental constraints which may mean that the additional potential shown in Map 6 cannot be realised.

Table 4: Integrated land information database outputs – Albany (SUA)

Local Government	R-Code	Area (ha)	No. lots	Lot potential (based on lower R-Code)	Lot potential (based on highest R-Code)	Additional dwelling potential (low)	Additional dwelling potential (high)
Albany	R1	141.50	262	n/a	n/a	n/a	n/a
	R2	1.39	2	2	2	2	2
	R2.5	4.86	12	12	12	-	-
	R5	49.43	188	169	169	61	61
	R5/20	235.28	975	762	4,515	205	2,569
	R10	1.11	10	9	9	1	1
	R12.5	22.27	198	196	196	33	33
	R17.5	1.61	20	22	22	1	1
	R20	556.38	4,598	9,599	9,599	3,054	3,054
	R20/50	23.74	36	489	1,254	409	1,095
	R25	573.61	4,968	13,577	13,577	5,108	5,108
	R30	220.37	1,824	6,377	6,377	2,962	2,962
	R30/40	4.85	55	134	198	62	114
	R30/50	3.64	21	107	169	12	67
	R30/60	4.19	55	116	254	59	170
	R40	12.41	151	483	483	291	291
	R40(OF)	21.49	208	894	894	412	412
	R40/60	9.78	114	388	585	194	350
	R60	2.46	9	160	160	25	25
	R60(IF)	4.46	37	277	277	134	134
	R60(MU)	1.43	15	90	90	50	50
	R60/80	7.96	67	496	631	221	309
	R80(C)	3.87	17	307	307	194	194
Albany Total		**1,908.08**	**13,842**	**34,666**	**39,780**	**13,490**	**17,002**

Source: Department of Planning (2015) *Integrated Regional Information System*

Map 6: ILID – Additional dwelling potential (high)



ILID modelling shows that there is extensive latent development potential in Albany. To what degree, and at what pace, this development will be undertaken is uncertain. Development pressure generally needs to be reasonably high to drive infill (or urban consolidation) in established areas. This type of growth is supported under the *Albany Local Planning Strategy 2010*; however, the very large stocks of greenfield land available for urban development around Albany's fringe are sufficient to absorb growth for many years. This situation has the potential to constrain the take-up rate of infill development.

The Spencer Park Improvement Special Control Area is a good example of a promising infill site that has not achieved its development potential. The purpose of the Spencer Park Improvement Special Control Area is to facilitate mixed use development as part of an upgrade of the Spencer Park Neighbourhood Centre and enable higher residential densities surrounding the centre.

The site is in an ideal location for infill development, being a neighbourhood centre and within a few kilometres of both Middleton Beach and the central business district. The local planning scheme allows for a variety of uses and is zoned for R40, R60 and R80 density residential building; however, as yet, demand has not been sufficient to drive development of this nature.

6.6 Lot supply pipeline

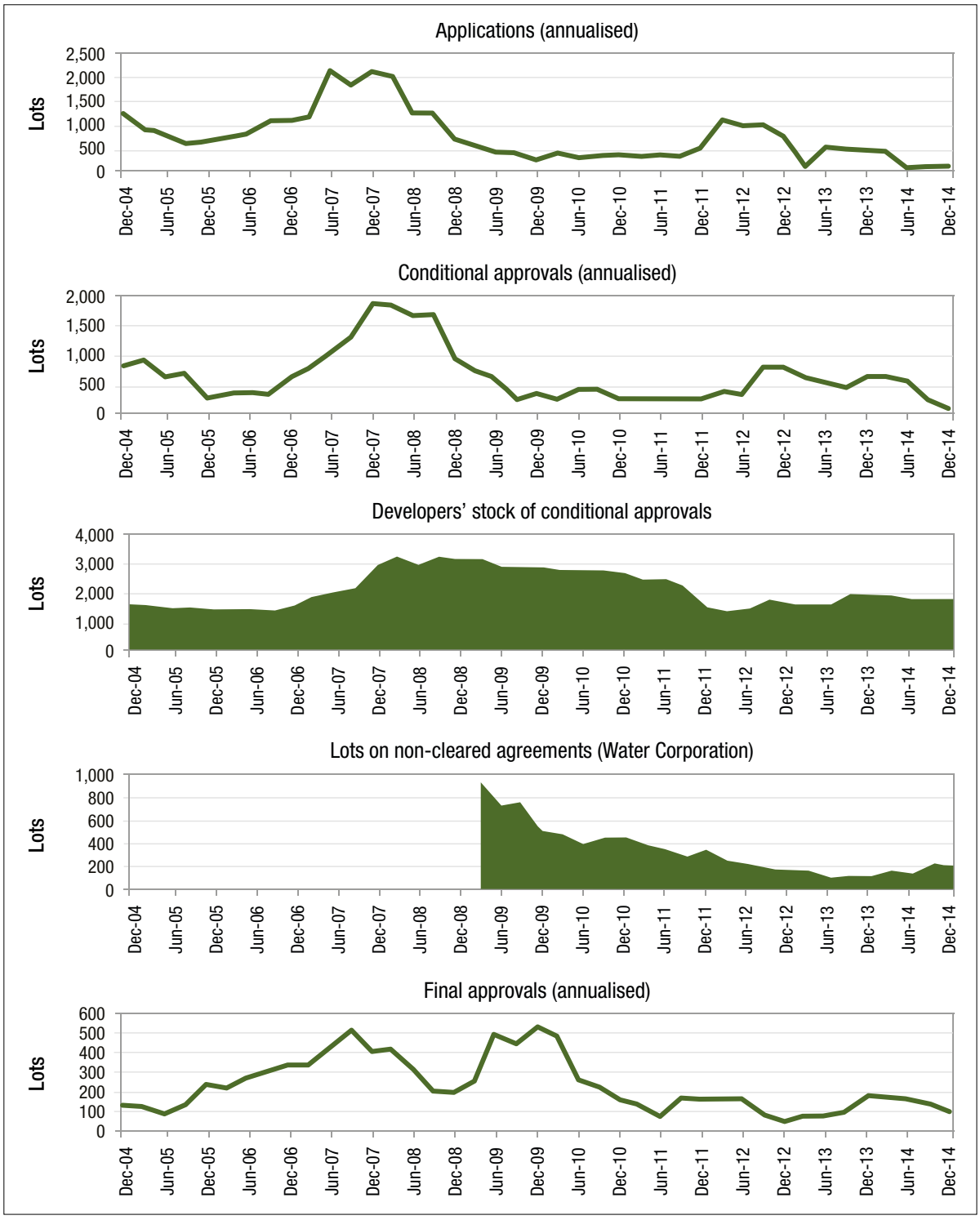
From January 2007 to June 2008 applications were lodged to create an average of 445 lots per quarter, which is substantially higher than the quarterly average (188 lots) over the decade to December 2014 (Figure 24). The number of applications (and conditional approvals) remained high until 2008 when activity decreased sharply.

The surge in activity and the subsequent (and abrupt) decline contributed to an increase in the developers' stock of conditionally approved lots, which remained unusually large for a sustained period. This stock of conditionally approved lots was then utilised, while the first home owners grant boost was available, without a significant increase in applications or conditional approvals during that time (Figure 24).

The graph in Figure 24, entitled lots on non-cleared agreements depicts the stock of conditionally approved residential lots for which a service provision agreement has been signed by the developer and the Water Corporation. This indicator provides a measure of the number of lots which are likely to be developed in the short-term. Data for this indicator is only available from 2009, but the available data shows a stark decline in the number of lots on non-cleared agreements in the City of Albany since that time, reflecting the reduced confidence in demand for new lots.

The most noticeable decline in the developers' stock of conditional approved lots shown in Figure 24 occurred in 2011/12 as a result of approvals granted during the rush of 2007/08 lapsing, rather than being developed. Figure 25 shows the indicative quarterly number of subdivision fall-overs (or lapsed approvals) in the City of Albany during the decade to December 2014. The large number of fall-overs in 2011/12 is a result of lots conditionally approved in 2007/08 expiring without reaching final approval. Analysis also shows a noticeable bump in conditional approvals shortly after the spate of fall-overs in 2011.

Figure 24: Residential subdivision activity and lot supply pipeline



Source: WAPC (2015) *State Lot Activity*, Water Corporation (2015) unpublished data

No data is available for lots on non-cleared agreements prior to 2009.

Map 7: Vacant lots

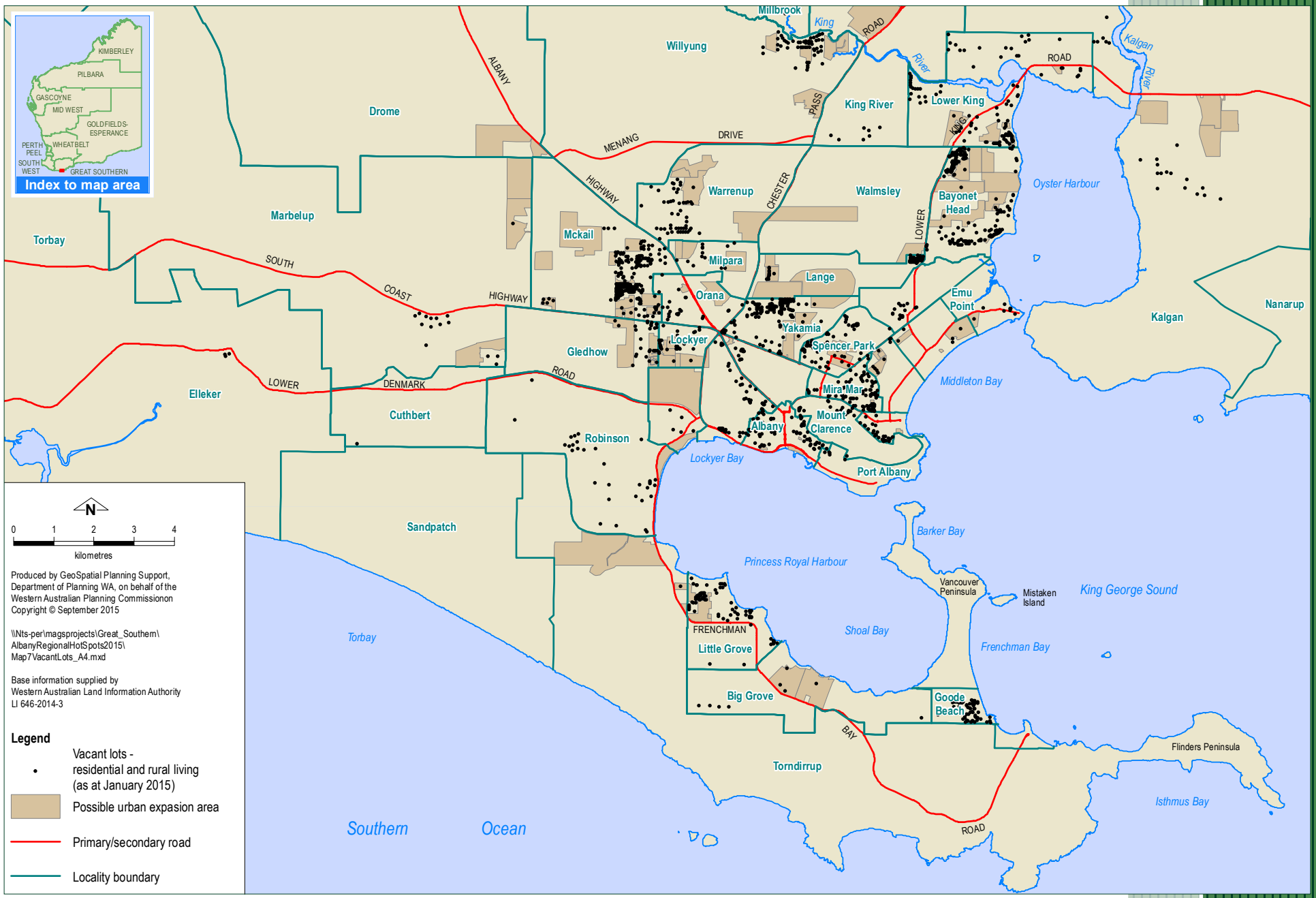
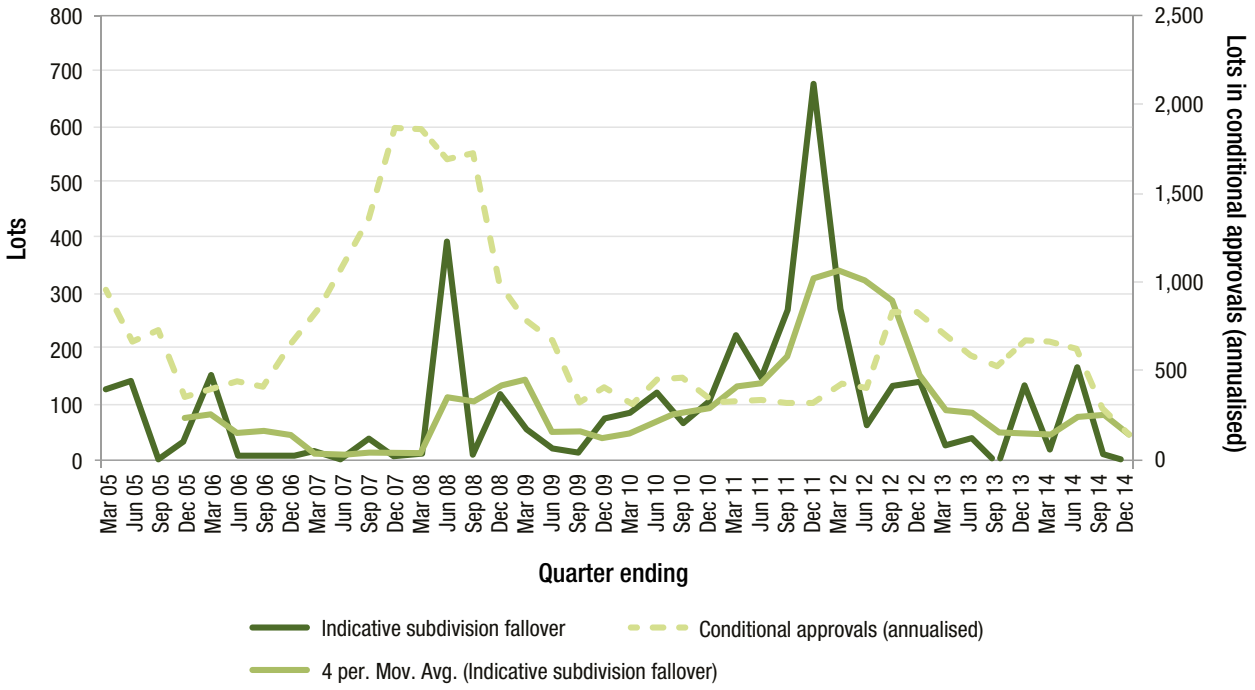


Figure 25: Indicative subdivision fall-over – City of Albany



Source: WAPC (2015) *State Lot Activity, Department of Planning analysis*

6.7 Vacant lots

Data from the Valuer General's Office indicates that there is a substantial stock of vacant residential lots in the City of Albany. As at December 2014 there were 1,562 vacant residential lots in the City which could theoretically provide sufficient sites for approximately five years of dwelling construction at a rate consistent with the development trends of the past decade. As depicted in Map 7, the stock of vacant lots (residential and rural living) is spread across all parts of the Albany SUA.

There are approximately 42 such lots per 1,000 residents in the City of Albany, compared to 27 lots per 1,000 residents in Greater Bunbury and 24 lots per 1,000 residents across Western Australia.

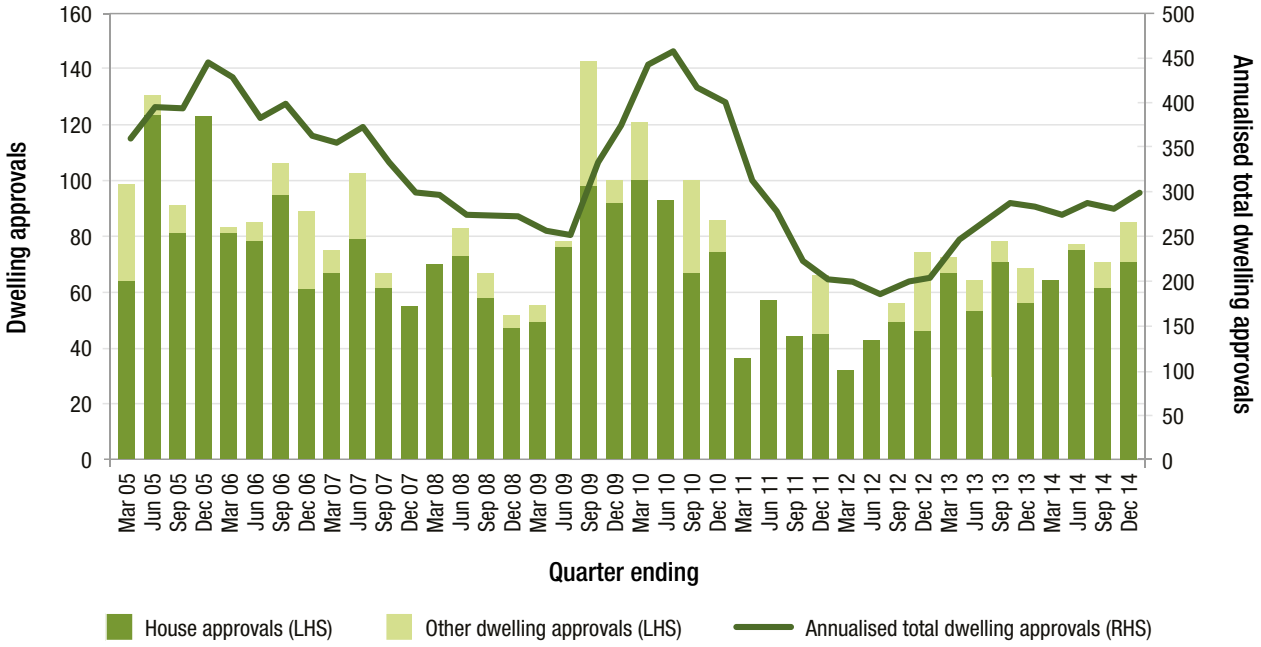
While the stock of vacant lots is high, it has been steadily depleted over the past few years (down from 1,693 in 2011), as vacant lots have been gradually consumed through dwelling construction.

6.8 Dwelling approvals

Dwelling approvals are a key demand indicator, representing either owner-occupier demand or investor confidence. As most dwelling approvals proceed to construction and eventually completion, they also provide a leading indicator of dwelling supply.

Like the data for final subdivision approvals, the data for dwelling approvals shows two distinct periods of heightened activity. In Albany, the second peak in dwelling approvals, during the First Home Owners' Grant boost period, was more pronounced than for Western Australia as a whole. More recently there has been a significant increase in dwelling approvals in Albany (Figure 26), with 288 approvals in 2013/14 and 241 approvals in the 2014/15 financial year (to February).

Figure 26: Dwelling approvals – City of Albany



Source: Australian Bureau of Statistics (2015) *Catalogue 8731.0 Building approvals*

6.9 Development Outlook

Table 6 and Maps 8-10 show possible development projects identified in Albany. The projects described are selected based on the Department of Planning's Urban Land Development Outlook criteria, which identifies future development areas in urban centres.

For this document, projects are identified as being future development areas through a variety of means including:

- local planning scheme zonings and amendments;
- developer intentions;
- consultation with local stakeholders;
- subdivision applications/approvals;
- local government development applications/approvals; and
- structure planning.

Projects identified include those expected to yield five or more dwellings or commercial/industrial units. A large number of sites have been identified through the process around the Albany urban area. Large residential estates in areas such as Bayonet Head, McKail, Lockyer and Gledhow are partially developed, with new lots created for residential development as required. There are also tracts of land identified through the zoning and structure planning process of sufficient size to support urban growth for a considerable time once existing developments are completed.

The suburbs anticipated to yield the most dwellings through identified future development projects are included in Table 5. For detailed information refer to Table 6 and Maps 8-10.

Table 5: Dwelling yields from identified future development areas – highest yielding suburbs

Suburb	Dwelling yield (< 5 years)	Dwelling yield (5-10 years)	Dwelling yield (10+ years)
Bayonet Head	258	513	1,473
McKail	291	195	901
Warrenup/ Walmsley	0	0	1,220
Big Grove	0	204	708
Yakamia	0	47	730
Lange	145	44	575
Gledhow	35	107	475
Lockyer	31	267	177
Lower King	18	0	327
Little Grove	11	0	330

Source: WAPC (2015) *Department of Planning analysis*

Table 6: Project summaries - Albany

Identifier	Location	Suburb	Existing tenure[1]	Purpose	Zoning/planning			Area/yield[2]			Subdivision approvals[3]		Anticipated release[4] (commencing early 2015)			Constraints[5]			Comments
					Current zoning	Amendment required	Other planning under way	Area (ha)	Yield (lots)	Yield (units)	Approvals pending	Current approvals	Short term (0-5 yrs)	Medium term (5-10 yrs)	Long term (10+ yrs)	Concern but resolution anticipated	Critical but resolution anticipated	Critical and resolution not definite	
ALB17	Lots 503, 506 & 507 Anchorage Park	Lower King	Anchorage Park Pty Ltd	Residential	Residential	No	Retirement village (part constructed) with development approval	2.3	31	31	0	0	0	31	0	MC			Undeveloped residential zoned land. Subdivision conditionally approved to create 31 lots for residential purposes in 2001 not progressed.
ALB20	Lot 1301 & Lot 11 Nanarup Road	Kalgan	Erogin Pty Ltd, Melrob Pty Ltd	Rural residential	Rural residential	No		97.6	84	84	0	37	37	47	0	MC			Site is zoned rural residential (RR9). Conditional subdivision approval has been granted to create 37 lots for which site works are currently being undertaken. Another application, for the remainder of the site, to create 47 rural residential lots has lapsed.
ALB21	Lot 9001 Oyster Heights	Bayonet Head	H Capararo	Residential	Residential	No		1.2	7	7	0	0	7	0	0	MC			Site is zoned residential and conditional subdivision approval has been granted to create 7 lots for residential purposes on the site.
ALB34	Pt Lot 5 Rufus Street	Milpara	Moss Enterprises WA Pty Ltd	Special residential	Special residential	No	Amended Subdivision Guide Plan - Lot 5 Rufus Street Milpara	13.0	37	37	0	0	16	21		MC, E			Amended Subdivision Guide Plan endorsed in 2006. In 2014 subdivision approval was granted to create 41 special residential lots on the site. Site works are underway with work on 16 lots completed.
ALB36	Lot 1000 Keyser Road & Lot 384 Loftie Street	Seppings	Walker Paddon Real Estate	Residential	Residential	No		3.1	42	42	0	0	0	42	0	MC	E		Site is zoned residential R30 under the LPS. A subdivision application lodged in 2008 was granted conditional approval but not progressed.
ALB38	Lot 205 and 9001 Allwood Parade	Bayonet Head	Peet - Bayonet Head Syndicate Pty ltd	Residential	Residential development	No		18.8	128	128	0	128	62	48	18	MC			Site comprises the remaining area of the partially developed Bayview Heights Estate. Development is underway and remaining lots are likely to be developed over a broad time-frame to suit market demand.
ALB40	Lot 9012 Pegasus Boulevard	McKail	Shearing Time Pty Ltd	Residential	Residential	No	McKail Local Structure Plan (2007)	3.0	34	34	0	24	34	0	0	MC			Undeveloped portion of Peet's 'The Sanctuary' residential estate, adjacent to Lake McKail.
ALB44	Lot 9002 Bandicoot Drive	Lange	Triumphant Nominees Pty Ltd	Residential	Residential	No		2.8	31	31	0	31	31	0	0				Site forms southern part of the Leanda Estate development. Development is underway.
ALB49	Lots 50 & 51 Link Road	Marbelup	Marbelup Investments	Rural residential	Rural residential	No		62.4	52	52	0	52	52	0	0	MC, E			Subdivision application conditionally approved to create 52 rural residential lots on the site.
ALB52	Lot 9000 Lancaster Road	McKail	S Lockwood, D Stone, S Kelly & J Lucas	Rural residential	Rural residential	No		19.9	18	18	0	0	0	0	18	MC			Subdivision application lodged in 2005 to create 18 rural residential lots (approximately 1ha each) granted conditional approval - not progressed.
ALB53	Lot 4743 North Road; Lot 420 Sydney Street; Lot 421 North Road	Yakamia	City of Albany, Ocean View Nominees Pty Ltd; Corporation of the society of the missionaries of Sacred Heart	Residential	Future urban	No		24.3	170	170	0	0	0	0	170	MC, Pw, W, S	E, P		Sizeable site located approximately 2km north of the town centre zoned for future urban development with planning in the very early stages. Development is subject to draft Yakamia structure plan, which was recently advertised for public consultation. Draft structure plan indicates environmental constraints may affect development potential.
ALB56	Lots 412, 9002 & 9003 Englehart Drive	McKail	Housing Authority	Residential, public purpose	Residential, public purpose	No	McKail Local Structure Plan (2007)	22.0	250	250	0	0	120	130	0	L, MC	P		Department of Housing site intended for single residential development over the short/ medium term. Project area incorporates the southern portion of the McKail Local Structure Plan, which proposes a primary school in the north eastern section of the site.
ALB61	Lot 9001, Cull Road	Lockyer	City of Albany	Residential	Future urban	No	South Lockyer Structure Plan (2009)	7.9	87	104	0	0	0	104	0	MC	D		Site is owned by the City of Albany and zoned for 'future urban' development. Planning for this site has been underway for some time. Lot 9001 is balance of land previously approved for subdivision; however, approval on this portion of the site has now expired.
ALB62	Lot 9001, Mercer Road	Walmsley	City of Albany	Residential	Residential	No		19.6	102	102	0	163	0	0	102	MC, P, W, H	E		Site is owned by the City of Albany and zoned residential. Planning for the site is in the early stages and no application to subdivide the property has been made to the WAPC. Project requires structure plan preparation and endorsement prior to development and is likely to progress as demand increases.
ALB67	Lot 9000, Cull Road	Gledhow	Y W Atwell, J G Kelly	Residential	Residential development	No		7.0	98	104	0	81	35	69	0	MC, E			Argyll Heights residential development. Development is underway at the site; however, lots are generally developed once sold and as such the development time frame of the site as a whole may span over an extended period. An application to create 81 lots on the northern part of the site was approved in May 2015.
ALB69	Lot 9100 Catalina Road	Lange	Kingopen Pty Ltd	Residential and aged care	Future urban	No		7.8	50	50	0	35	50	0	0	MC			Subdivision application lodged in 2011 to create 96 lots for residential purposes; 12 of which are developed. A subsequent subdivision application covering the remainder of the site has since been approved to create 35 lots for residential purposes and one 2ha lot for aged care purposes.
ALB72	Lot 29 Greatrex Road	Lower King	Numerous land owners	Residential	Residential, residential development	No		24.1	147	0	0	147	0	0	147	MC, LC			A subdivision application was received by the WAPC for this site to create 147 lots for residential purposes in 2013. Applicant has since lodged to creat 19 lots on the site which may be developed in the short-term.
ALB73	Lot 107 Francis Street & Lot 120 Hadey Road	Lower King	Anchorage Park Pty Ltd	Residential	Residential	No		15.2	210	210	0	0	0	0	210		E, MC, Pw, W, S		The site is zoned for development and owned by a property group. An application to create 65 lots for residential and public open space purposes was granted conditional subdivision approval in 2008 but not progressed. The dwelling yield is based on 14 dwellings per gross hectare.

Table 6: Project summaries - Albany

Identifier	Location	Suburb	Existing tenure[1]	Purpose	Zoning/planning			Area/yield[2]			Subdivision approvals[3]		Anticipated release[4] (commencing early 2015)			Constraints[5]			Comments
					Current zoning	Amendment required	Other planning under way	Area (ha)	Yield (lots)	Yield (units)	Approvals pending	Current approvals	Short term (0-5 yrs)	Medium term (5-10 yrs)	Long term (10+ yrs)	Concern but resolution anticipated	Critical but resolution anticipated	Critical and resolution not definite	
ALB74	Lots 94 & 95 Francis Street	Lower King	Griffell Nominees Pty Ltd, Blacktora Pty Ltd	Residential	Residential	No		2.6	7	7	0	7	7	0	0	MC	E		Site is zoned residential (R5/20). A detailed area plan was developed proposing 45 dwellings for the site; however this appears not to have been progressed. More recently an application to create 7 lots on the site was granted conditional subdivision approval in 2012.
ALB75	Lot 108 Nanarup Road	Lower King	C & S Mitchell	Residential	Residential	No		3.3	11	11	0	11	11	0	0	MC, E			Subdivision application to create 11 lots for residential purposes received conditional WAPC approval in 2013.
ALB79	Lots 300 & 400 Pony Club Road	Willyung	L & B Brown, & C & S Newton	Rural residential	Special residential	No		11.1	12	12	0	0	0	12	0		P, MC, E		Subdivision application to create 12 lots for rural residential purposes received conditional WAPC approval in 2013; however, development has not progressed.
ALB80	Lot 9100 Willyung	Willyung	B Panizza	Special residential	Special residential	No		7.9	11	11	0	11	11	0	0				Subdivision application lodged with the WAPC in 2010 to create 29 lots for special residential purposes. The northern and southern 'ends' of the site have been developed, with the centre of the site likely to be developed in the short-term.
ALB81	Lot 150 Barry Court Collingwood Park	Collingwood Park	Walker Paddon Real Estate Pty Ltd	Tourism/ Residential	Tourism residential, Hotel/motel	No		0.6	6	6	0	0	0	6	0				Undeveloped land zoned for tourist purposes located between existing tourist accommodation and Albany Golf Course. A previous subdivision approval (now expired) included 6 residential survey strata lots. An active subdivision approval is in place to excise residential portion of land as a single lot from tourist balance.
ALB82	Lot 6 Henderson Road	Drome	B Mattison, S McRae	Rural Residential	Rural Residential	No		10.3	9	9	0	0	0	9	0	MC			Subdivision application conditionally approved in 2010 to create 9 lots for rural residential purposes. Not progressed.
ALB84	Lots 11, 48 & 53 Little Oxford Street, Lots 54 & 146 Cull Road, Lot 50 Argyll Street	Gledhow	Numerous owners (private sector)	Residential	Residential	No	South Lockyer Structure Plan (2009)	84	86	86	0	43	0	63	0	MC, E, L			Site is shown as a residential with land allocated for a waterway/passive recreation area in the South Lockyer Structure Plan. There are currently two separate subdivision applications with current conditional approval to create lots for residential purposes on the site - approved in 2012 (20 lots) and 2013 (23 lots). Although there are conditionally approved subdivisions active on the site, it is possible that these will not be progressed in the short-term due to current market conditions.
ALB85	Lots 1, 7, 20, 21, 109 &110 Frenchman Bay Road	Big Grove	Peet Tri State Syndicate Ltd	Residential, public purpose	Future urban	No	Big Grove Outline Development Plan	57.3	472	472	0	0	0	204	268	MC, L	Pw, W, S, E		Site forms a large part of the Big Grove Outline Development Plan area. The Plan proposes low to medium density residential development, a primary school, public open space and mixed use areas.
ALB88	Lot 1 Grove Street	Little Grove	V & W Morey	Residential	Future urban	No	Little Grove Structure Plan (2009)	1.1	11	0	0	11	11	0	0	MC			Forms part of the Little Grove Structure Plan area. There is currently a conditional subdivision on the site to create 11 dwellings for residential purposes.
ALB88A	Numerous lots bounded by Frenchmen Bay Road, Queen Street & Jeffcott Street	Little Grove	Numerous owners (private sector)	Residential	Future urban	No	Little Grove Structure Plan (2009)	36.3	330	330	0	0	0	0	330	MC, L, E			Forms part of the Little Grove Structure Plan area. Dwelling yield is estimated based on an average density of 9 dwellings per gross hectare - approximately equivalent to existing development in the area.
ALB92	Lot 150 Townshend Street	Lockyer	Uniting Church Homes	Residential	Residential	No	South Lockyer Structure Plan (2009)	5.9	87	87	0	0	0	0	87	MC			Shown as a proposed residential area in the South Lockyer Structure Plan. An 87 lot residential subdivision was proposed for the site in 2007; however, this was not progressed.
ALB94	Lots 35 & 134 Le Grande Avenue, Lots 32 & 37 Silver Street, Lot 9000 Boundary Street, Lot 33 Costigan Street	McKail	Various landowners - private & Government	Residential	Future urban	Yes	Outline development plan endorsed	6.4	93	100	0	43	100	0	0	MC, L			Three active conditional subdivision approvals cover the eastern portion of the site with 8 of the proposed lots already developed for residential purposes. An additional 43 proposed lots are conditionally approved on the site. The Sothern McKail Outline Development Plan was produced for the site and adopted in 2009 (amended in 2010). There are currently several dwellings on the existing lots.
ALB96	Lots 113, 114 & 118 Boundary Street, Lots 115, 116 & 117 Flemington Street, Lot 51 Le Grande Avenue	McKail	Various landowners - private	Residential	Future urban	No	McKail Local Structure Plan (2007)	14.9	185	185	0	0	2	0	183	MC, L			Site is zoned future urban and forms part of the McKail Local Structure Plan area; however, there has been no subdivision activity thus far.
ALB98	Lot 8 Beaudon Road, Lot 1 South Coast Highway	McKail	M D'Addario	Rural residential	Rural residential	No		7.6	7	7	0	7	7	0	0				Conditional approval granted in 2012 to create 7 lots for rural residential purposes.
ALB99	Lot 9001, Lot 195 Lowanna Drive	Marbelup	S Plant, Goldmap Corporation Pty Ltd	Rural residential	Rural residential	No		45.4	23	23	0	0	23	0	0	MC			Site is zoned for rural residential development and was part of a partially developed subdivision application granted conditional approval in 2010.
ALB100	Lot 7 Rufus Street	Milpara	Acetown Nominees Pty Ltd	Special residential	Special residential	No	Outline development plan - Lot & Rufus Street	7.9	83	83	0	0	0	0	83	MC	P, E		Outline development plan - Lot 7 & Rufus Street - endorsed by WAPC in 2010. The plan proposed 83 special residential lots on the site; however, as yet, none have been developed. A subdivision application was conditionally approved by the WAPC in 2011 to create 30 lots on part of the site, 16 of which have been developed.

Table 6: Project summaries - Albany

Identifier	Location	Suburb	Existing tenure[1]	Purpose	Zoning/planning			Area/yield[2]			Subdivision approvals[3]		Anticipated release[4] (commencing early 2015)			Constraints[5]			Comments
					Current zoning	Amendment required	Other planning under way	Area (ha)	Yield (lots)	Yield (units)	Approvals pending	Current approvals	Short term (0-5 yrs)	Medium term (5-10 yrs)	Long term (10+ yrs)	Concern but resolution anticipated	Critical but resolution anticipated	Critical and resolution not definite	
ALB101	Lots 77 & 78 Range Road	Yakamia	White Toro Pty Ltd	Residential	Future urban	No	Draft Yakamia District Structure Plan (2009)	15.4	225	225	0	225	0	225	0	MC, E, P	D, S		Subdivision application approved in 2012 to create 47 lots for residential purposes. The draft Yakamia Structure Plan was recently advertised for public consultation. Development may require a waste water pump station to proceed.
ALB107	Lot 9000 Menegola Drive	Warrenup	Skyrail Holdings Pty Ltd	Special residential	Special residential, parks and recreation	No		34.9	34	34	0	34	34	0	0	MC			Conditional subdivision approval was granted to create 34 special residential lots on the site in 2014.
ALB112	Lots 278 & 304 Pioneer Rd	Centennial Park	Amaroo Care Services Inc.	Retirement village	Residential and tourist residential	No		2.2	2	48	0	0	48	0	0	MC			Amaroo Village retirement units development. Likely to be fully constructed within a five year time-frame; however, units to be constructed in stages to meet demand, so the ultimate timeframe is uncertain.
ALB113	Lot 422 Affleck Road	Kalgan	Archipelago Nominees Pty Ltd	Rural living	General agriculture	Yes		40.6	31	31	0	0	0	0	31	MC			Subdivision application submitted in 2009 to create 31 lots for rural living purposes cancelled.
ALB114	Lot 1005 Catalina Road	Lange	Kingopen Pty Ltd	Residential	Residential	No	Catalina Central Structure Plan (2003)	1.7	44	44	0	2	0	44	0	MC, P, W			Adjacent to the Brooks Garden Shopping Centre, this site forms part of the Catalina Central Structure Plan area. Conditional approval was granted to create 2 super lots for residential purposes on the site in 2012. Dwelling yield is estimated based on the endorsed structure plan.
ALB115	Lot 1000 Brooks Garden	Lange	St Ives Villages Pty Ltd	Retirement village	Residential	No		8.1	0	30	0	0	30	0	0				Stage 2 of St Ives Retirement Village. Approximately 30 dwellings still to be constructed on the site.
ALB116	Lots 30, 31, 32, 33, 34 & 35 Catalina Road	Lange	A Pierce, A Lionette, W Steinert, L Pocock, C Powell, Amaroo Limousin Stud Pty Ltd	Residential	Future urban	No	Draft Yakamia District Structure Plan (2009)	46.5	650	650	0	0	0	0	650	Pw, W, MC, L, E, S			Area zoned as 'Future Urban' under the City of Albany LPS. Lot and dwelling yields are based on an assumption of 14 dwellings per gross zoned hectare. The draft Yakamia Structure Plan was recently advertised for public consultation.
ALB117	14 Spencer Street	Albany	Activ Foundation Inc.	Mixed use	Residential	No		0.4	3	10	0	11	10	0	0	MC			Norman House site. Subdivision approved on the site to create 3 lots for commercial purposes, within which a survey strata application has been approved to create 11 survey strata lots catering for 10 proposed dwellings. There is also a proposal to develop 20 units for student accommodation on the site.
ALB118	Lots 2, 3 & 4 Toll Place	Albany	City of Albany; WA Land Authority	Mixed use/ entertainment	Special use	No	Albany Waterfront Structure Plan report prepared by Hames Sharley for LandCorp (2006)	17.5	0	0	0	0	0	0	0	MC			Albany Waterfront development area is covered by special use 15 zone under the City of Albany LPS. The Albany Entertainment Centre has been constructed on the site which also has scope for various commercial and tourism developments.
ALB119	Lots 1523 & 3000 Emu Point Drive	Collingwood Park/Emu Point	WA Land Authority	Residential/ mixed use	Future urban, parks and recreation & hotel/motel	No	Emu Point Structure Plan (2009)	33.2	0	0	0	0	0	0	0			P, Z, Pw, W, MC, L, E	Structure plan, under preparation by LandCorp, proposes single dwellings, strata dwellings, town houses and apartments as well as a "village" on the site. As yet no application to subdivide the site has been submitted to the WAPC. Although this site had been flagged for 256 dwellings on 133 lots, the development potential of the site is now uncertain due to the constraints identified.
ALB120	Lot 236 Hanrahan Rd	Lockyer	State Housing Commission	Residential	Future urban	No	South Lockyer Structure Plan (2009)	22.6	137	163	0	120	0	163	0	MC, Z			Department of Housing has obtained subdivision approval to develop the site and, structure planning and scheme amendments are in place; however, site development is likely to be delayed to better suit local market demand.
ALB121	Lots 9, 10, 11, 12, 16 & 17 Panorama Road, Lots 301, 302, 303 & 9000 Frenchman Bay Road	Big Grove	Numerous landowners (private)	Residential	Future urban	No	Big Grove West Outline Development Plan	44.3	620	620	0	0	0	0	620		P, Pw, W, S MC, L, E		Site covers the Big Grove West Outline Development Plan area and western lot of the Big Grove East Outline Development Plan (ALB85). Unlike ALB85, this site has fragmented ownership and planning for the site is less progressed. The dwelling yield for this site is based on a gross density of 14 dwellings per gross hectare across the entire site.
ALB122	55 Lancaster Road	McKail	Irwin Pty Ltd & Albany Drainage and Construction Pty Ltd	Residential	Future urban & general agriculture	No	Lancaster Rd L55 - McKail Outline Development Plan	5.6	28	28	0	28	28	0	0	MC			Site forms part of the McKail Local Structure Plan area and an outline development plan was subsequently produced for the site area. There is currently conditional subdivision approval to create 28 residential lots on the site.
ALB123	Lots 48 & 49 Morgan Road, Lots 47, 50 & 51 Lancaster Road	McKail	M & N Nelson, J & P Boccamazzo, R & E Wilkinson, S Klein, N Lembo	Residential	Future urban	No	Morgan Place-Morgan Road-Lancaster Road Outline Development Plan (2010)	11.9	165	165	0	0	0	165	0	MC, L, E			Structure plan (endorsed 2010) proposes predominantly R20 residential for the site. Dwelling yield based on 14 dwellings per gross hectare on the site. Subdivision activity yet to commence.
ALB124	Numerous lots	Yakamia	Numerous land owners	Residential	General agriculture, future urban	Yes	Draft Yakamia District Structure Plan (2009)	113.4	1,500	1,500	0	0	0	0	1,500		P, Z, MC, L, E, W, S		Yakamia North area. Site forms north-west section of the draft Yakamia District Structure Plan area. Structure planning proposes residential areas, with a small amount of mixed business, retail and public open space. The estimated dwelling yield is based on a gross density of 14 dwellings per hectare across the site. The draft Yakamia Structure Plan was recently advertised for public consultation.

Table 6: Project summaries - Albany

Identifier	Location	Suburb	Existing tenure[1]	Purpose	Zoning/planning			Area/yield[2]			Subdivision approvals[3]		Anticipated release[4] (commencing early 2015)			Constraints[5]			Comments
					Current zoning	Amendment required	Other planning under way	Area (ha)	Yield (lots)	Yield (units)	Approvals pending	Current approvals	Short term (0-5 yrs)	Medium term (5-10 yrs)	Long term (10+ yrs)	Concern but resolution anticipated	Critical but resolution anticipated	Critical and resolution not definite	
ALB125	Numerous lots Frenchman Bay Road	Robinson/Mt Elphinstone	Various landowners	Tourism or residential	Tourist residential	No		27.8	335	335	0	0	0	0	335	P, LC	S		This site covers 27.8 hectares along the coast of Frenchman's Bay along the north-west coast of Princess Royal Harbour. The area is currently developed at very low density (1-2 dwelling per hectare) which means there is substantial potential for increased development on the site given the current R-coding of R20/R50 (higher for tourist development). No structure planning is required prior to development on the site. Development is contingent on the provision of reticulated sewerage to the site. The dwelling yield has been estimated based on an eventual gross density of approximately 12 dwellings per hectare.
ALB126	Lot 253 Mueller Street	Lockyer	STV Investments Pty Ltd	Residential	Future urban	No	South Lockyer Structure Plan (2009)	4.2	31	31	0	31	0	31	0	MC			Site forms part of the South Lockyer Structure Plan area, which proposes residential areas and wetland vegetation/passive open space for the area. Conditional subdivision approval has been granted to create 31 lots for residential purposes on the site.
ALB127	Lots 1, 2, 3, 4, 5 & 6 Mai Street, Lot 134 Cuming Road, Lot 75 Greyhound Circuit	Lockyer	W & W Wood, C Roberts, Mariebar International QLD Pty Ltd & others (private)	Residential	Future urban	No	South Lockyer Structure Plan (2009)	12.1	90	90	0	0	0	0	90	MC, LC	E, D		Site forms part of the South Lockyer Structure Plan area, which proposes residential areas and wetland vegetation/passive open space for the area. Estimated dwelling yield assumes a density of 7.5 dwellings per gross hectares, which is approximately equivalent to the proposed development in the adjacent lot (ALB126).
ALB128	Numerous lots between South Coast Highway and Cuming Road	Gledhow	Numerous landowners (private)	Residential	Future urban	No	East Gledhow Small Land Holdings Area and East Gledhow Southern Catchment Outline Development Plans	45.6	428	450	0	0	0	0	450	P, MC, L, E, W, S			Site forms part of the East Gledhow Area and Southern Catchment Outline Development Plans area. The plans propose a variety of dwelling densities across the site including approximately 26 R5 dwellings;105-130 R10/15 dwellings; 250-290 R20 dwellings; and 40-50 R30 dwellings. Land ownership on the site is highly fragmented which is likely to mean that development is rolled out over an extended time-frame. Some preliminary subdivision has occurred in the southern proportion of the site
ALB129	Lot 300 Timewell Road, Lots 526 & 507 Lancaster Road, Lot 124 Federal Street	McKail	Vegate Pty Ltd, R Forgione, Lancaster Park Pty Ltd	Residential	Future urban	No	McKail North Outline Development Plan	79.6	700	700	0	0	0	0	700		P, MC, L, E, W	S	Site zoned as future urban under the local planning scheme. Structure planning (incorporating all but the northern-most lot) is currently being finalised. No subdivision activity has commenced on the site.
ALB130	Lot 6 Chester Pass Road	Warrenup/ Walmsley	F, B, M & A D'Addario; T & T Gorman Pty Ltd; P List, S & G Davies, Cammit Pty Ltd; W & L Spinks	Residential	Future urban	No		121.9	1,450	1,450	0	0	0	0	1,450		P, MC, L, E, W, S		Site is zoned as future urban and requires preparation and endorsement of structure plan before subdivision and development can commence. Dwelling yield is based on a density of 12 dwellings per gross site hectare.
ALB131	Lot 300 Anson Road	Orana	Minister for Training	Uncertain	Future Urban	Yes		26.2	0	0	0	0	0	0	0		P, Z, MC, L, E, W, S		The Albany Office of the Department of Agriculture and Food is located in the north-west of this lot. Although the site is zoned as future urban under the local planning scheme the long-term land use may depend on future demand. As the site is likely to be used for non-residential purposes in the future, dwelling yield estimates have been allocated a zero value.
ALB132	Lot 385 Loftie Street	Seppings	L & P Travers	Residential	Residential	No		2.0	30	30	0	0	0	0	30	MC, P	S		Site is zoned residential R30 under the local planning scheme; however, there is currently a dwelling on the lot. Consequently, the timeframe and precise nature of any development on the site will depend on the landowner. Dwelling yield estimate is based on a future gross residential density of 15 dwellings per gross site hectare.
ALB133	Lots 107, 108, 109 & 110 Drew Street ; Lots 1 & 392 Wright Street	Seppings	R Vind; T & E Watkins	Uncertain	Future urban	Yes		11.1	165	165	0	0	0	0	165	MC, P, D	S		Site is zoned Future development and requires structure planning prior to subdivision and development. Dwelling yield estimate is based on a future gross residential density of 15 dwellings per gross site hectare.
ALB134	Lots 74 & 75 Range Road	Yakamia	Bohemia Estates Pty Ltd;	Residential	Future urban	No	Yakamia District Structure Plan (2009)	10.2	120	120	0	0	0	0	120	P, Z, MC, L, W, S		E, D	Site is zoned future urban and forms part of the Yakamia District Structure Plan area. Dwelling yield estimate based on a future development density of 12 dwellings per gross site hectare.
ALB135	Lots 697, 698, 699 Wright Street	Collingwood Park	Various (private sector)	Residential	Future urban	No		6.3	90	90	0	0	0	0	90	P, MC, L, E, W, S			Site is zoned future urban and requires structure plan preparation and endorsement prior to development. Dwelling yield estimate based on a future development density of approximately 14 dwellings per gross site hectare.
ALB136	Lot 4 Cosy Corner Road; Lot 130 Coombes Road	Kronkup	S McLeod; A & P London	Rural residential	Rural residential	No		33.9	10	10	0	0	0	10	0	P, MC	S		There is provision for the creation of 10 lots on this site; however, neither lot is currently vacant and consequently the time frame and precise nature of any development on the site is dependent on the land owners.
ALB137	Numerous lots	Torndirrup	Numerous owners (private sector)	Rural small holdings	Rural small holdings	No		186.1	20	20	0	0	0	0	20	L, MC, E			Land is zoned for rural small holdings and is currently very sparsely developed. There is provision under the local planning scheme for approximately 20 lots/dwellings on the site. Large portions of the site also fall within water bore buffer areas.
ALB138	Lot 9002 Link Road	Marbelup	S Gomm	Rural residential	Rural residential	No	Subdivision guide plan endorsed.	52.6	17	17	0	0	0	0	18	L, MC			A subdivision guide plan has been endorsed for the site with provision for 18 rural residential lots.

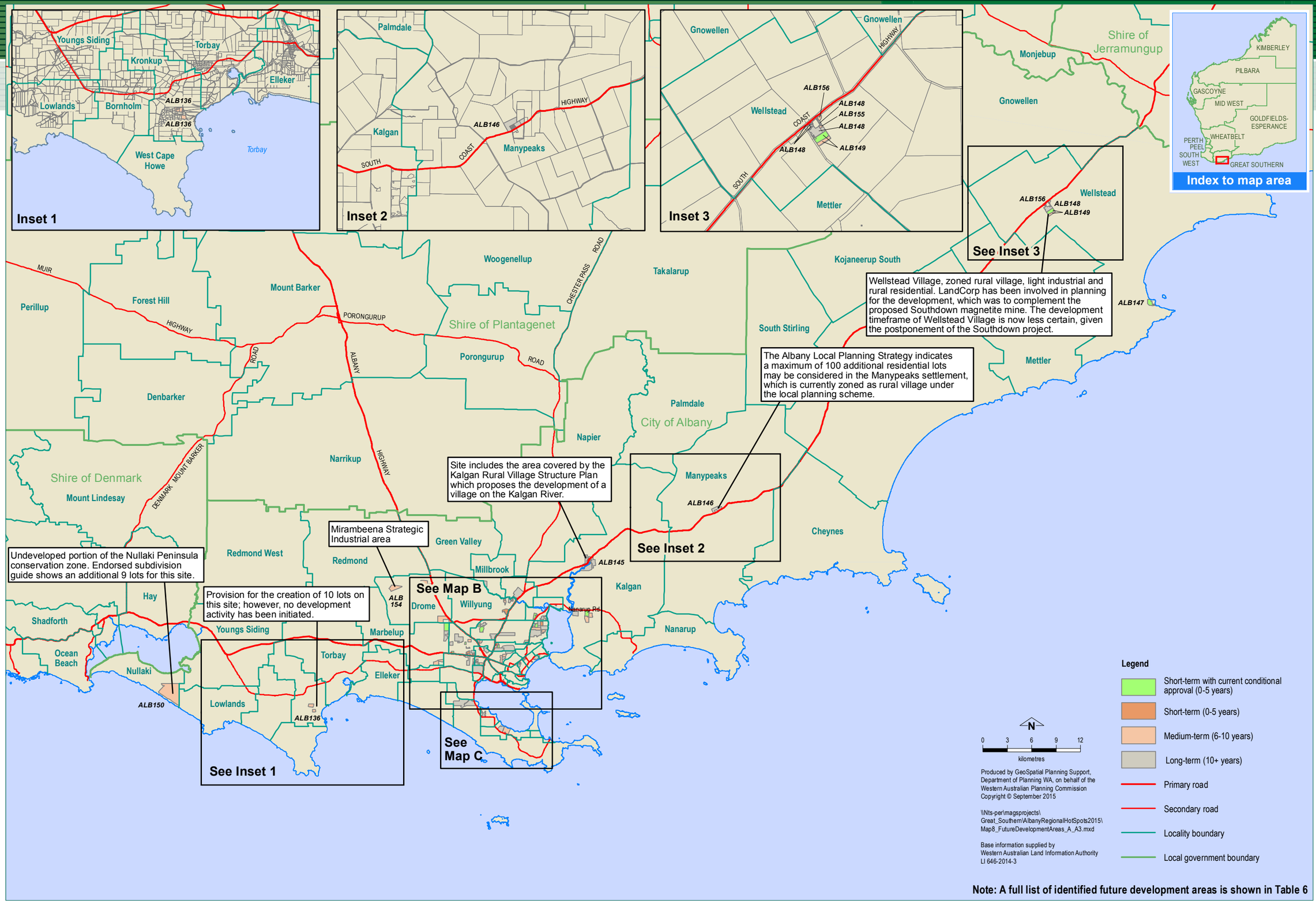
Table 6: Project summaries - Albany

Identifier	Location	Suburb	Existing tenure[1]	Purpose	Zoning/planning			Area/yield[2]			Subdivision approvals[3]		Anticipated release[4] (commencing early 2015)			Constraints[5]			Comments
					Current zoning	Amendment required	Other planning under way	Area (ha)	Yield (lots)	Yield (units)	Approvals pending	Current approvals	Short term (0-5 yrs)	Medium term (5-10 yrs)	Long term (10+ yrs)	Concern but resolution anticipated	Critical but resolution anticipated	Critical and resolution not definite	
ALB139	Lot 2 off Albany Highway	Drome	New Season Nominees Pty Ltd	Rural residential	Special Use 22	No	Land rezoned to suit specific type of residential lifestyle development	77.8	60	60	0	0	0	0	60	P, MC, E			Proposed development for this site includes a low density residential estate for horse owners with access to communal infrastructure and to centralised management; controlled through scheme provisions and complemented by a strata management plan.
ALB140	Pt Lot 2 Rocky Crossing Road	Warrenup	V & A Van Den Berg	Special residential	Special residential	No		8.4	17	17	0	17	17	0	0	MC, E			Subdivision to create 17 lots for special residential purposes granted conditional approval in 2013.
ALB141	Pt Lot 2 & Lot 14 Rocky Crossing Road	Warrenup	V & A Van Den Berg; S Gillet & R Hunter	Special residential	Special residential	No		27.9	56	56	0	0	0	0	56	P, MC, L, E, W, S			Undeveloped land zoned for special residential purposes. No subdivision or structure planning activity has occurred for this site. Dwelling yield is based on a future density of approximately 2 dwellings per gross site hectare.
ALB142	Lot 50 Chester Pass Road	King River	G & G Cake	Rural residential	Rural residential	No		102.4	70	70	0	0	0	0	70	P, MC,E, W			Undeveloped site zoned for rural residential development under the local planning scheme.
ALB143	Lot 9002 Pony Clu Road	Willyung	Rokat Nominees Pty Ltd	Rural residential	Rural residential	No		12.9	12	12	0	0	0	0	12	P, MC,E, W			Undeveloped portion of rural residential area no. 11. No active subdivision application lodged for site.
ALB144	Lot 2 Hazzard Road	Millbrook	M De Groot	Rural residential	Rural residential	No		21.9	9	9	0	0	0	0	9	P, MC,E, W			Undeveloped land zoned for rural residential purposes. Site has the potential to yield 9 lots; however no subdivision or development activity has been initiated.
ALB145	Numerous lots	Kalgan	Numerous owners (private and government)	Rural Village	Rural Village	No	Kalgan Rural Village Structure Plan	176.5	135	135	0	10	10	0	125	P	MC, L, E, W, S		Site includes the area covered by the Kalgan Rural Village Structure Plan which proposes the development of a village on the Kalgan River. There is one existing approval for 10 lots active until 2018 but no lots have been created yet.
ALB146	Lots 51 & 6263	Manypeaks	State of WA; L & H Brehendt	Rural Village	Rural Village	No		48.5	100	100	0	0	0	0	100		P, MC, L, E, W, S		Zoned as rural village under the local planning scheme, the Albany Local Planning Strategy indicates a maximum of 100 additional residential lots may be considered in the settlement. Structure plan development and endorsement are required prior to the consideration of development on this site.
ALB147	Pt Crown Allotment 1181 Sandalwood Road	Wellstead (Cape Riche)	P Moir	Rural residential	Rural residential	No		41.7	9	9	0	9	9	0	0	MC			Located toward the eastern end of the City of Albany, this site is zoned for rural residential development under the local planning scheme Conditional subdivision approval was granted in 2012 to create 11 lots of which 9 are likely to be used for rural residential purposes.
ALB148	Numerous lots	Wellstead (Wellstead village)	Numerous owners (private and government)	Rural Village	Rural Village	No		58.7	100	100	0	0	0	0	100	MC	P, L, E, W, S		Site is zoned as a rural village under the local planning scheme and there is provision in the local planning strategy for up to 100 such lots. Development will require the endorsement/ approval of a suitable structure plan and subdivision plans for the site.
ALB149	Lot on survey - 201 South Coast Highway	Wellstead (Wellstead village)	S Hall	Rural residential	Rural residential	No		52.5	40	40	0	20	20	20	0	MC			Site is zoned rural residential in the local planning scheme and is adjacent to the proposed Wellstead rural village identified in the local planning strategy. A subdivision guide plan identifying 40 proposed lots for the site has been endorsed and 20 proposed lots on the site have conditional subdivision approval.
ALB150	Lot 9005 Rock Cliff Circuit	Nullaki	G Robertson	Rural living	Conservation zone	No		436.9	9	9	0	0	0	9	0	MC, E			Undeveloped portion of the Nullaki Peninsula conservation zone. Endorsed subdivision guide shows an additional 9 lots for this site.
ALB151	Lot on Survey - 888 Flinders Parade; Crown allotments 660 & 661 Marine Terrace	Middleton Beach	WA Land Authority	Activity centre	Hotel/motel; tourist residential	No		1.5	0	0	0	0	0	0	0	P, MC			Site of the former Middleton Beach Hotel - demolished in 2007 and is now covered by the WAPCs Improvement Plan No.40. The State Government is currently progressing planning for the site. The public has been invited to provide submissions on the form of the precinct.
ALB152	Lots 401 & 405 Albany Highway	Orana	Coles Group Property Developments Pty Ltd	Commercial	Neighbourhood centre	No		3.2	0	0	0	0	0	0	0				Plans for a shopping centre complex including a Coles supermarket, several smaller retail/ dining outlets and a large parking area have been approved by the Great Southern JDAP. Construction is well underway at the site with the complex anticipated to open in mid-2015.
ALB153	Lots 5 & 14 Down Road	Drome	Industrial Lands Development Authority; WA Land Authority	Industrial	General industry	No		70.4	0	0	0	0	0	0	0	MC, E, D	Pw, W		Undeveloped portion of the Down Road (or Mirambeena) Strategic Industrial Area (east). The site is a LandCorp project and the number of lots, timing and type of industrial development on the site is likely to depend on emerging demand. At the eastern end of the site there appears to be a tailing pond of some type that may have an application for the adjacent sandalwood factory.
ALB154	Pt lot 9001 Down Road	Drome	WA Land Authority	Industrial	General industry	No		66.3	0	0	0	0	0	0	0	MC, E	Pw, W		Undeveloped portion of the Mirambeena Strategic Industrial Area (west). Also known as the Down Road Timber Precinct. The site is a LandCorp project and the number of lots, timing and type of industrial development on the site is likely to depend on emerging demand.
ALB155	Crown allotment 46	Wellstead	State of WA	Industrial	Light industry	No		3.1	0	0	0	0	0	0	0	MC, E			Undeveloped site zoned for light industrial purposes under the local planning scheme. Subdivision application to create 5 lots on the site has been deferred pending an investigation into the suitability for on-site wastewater disposal.

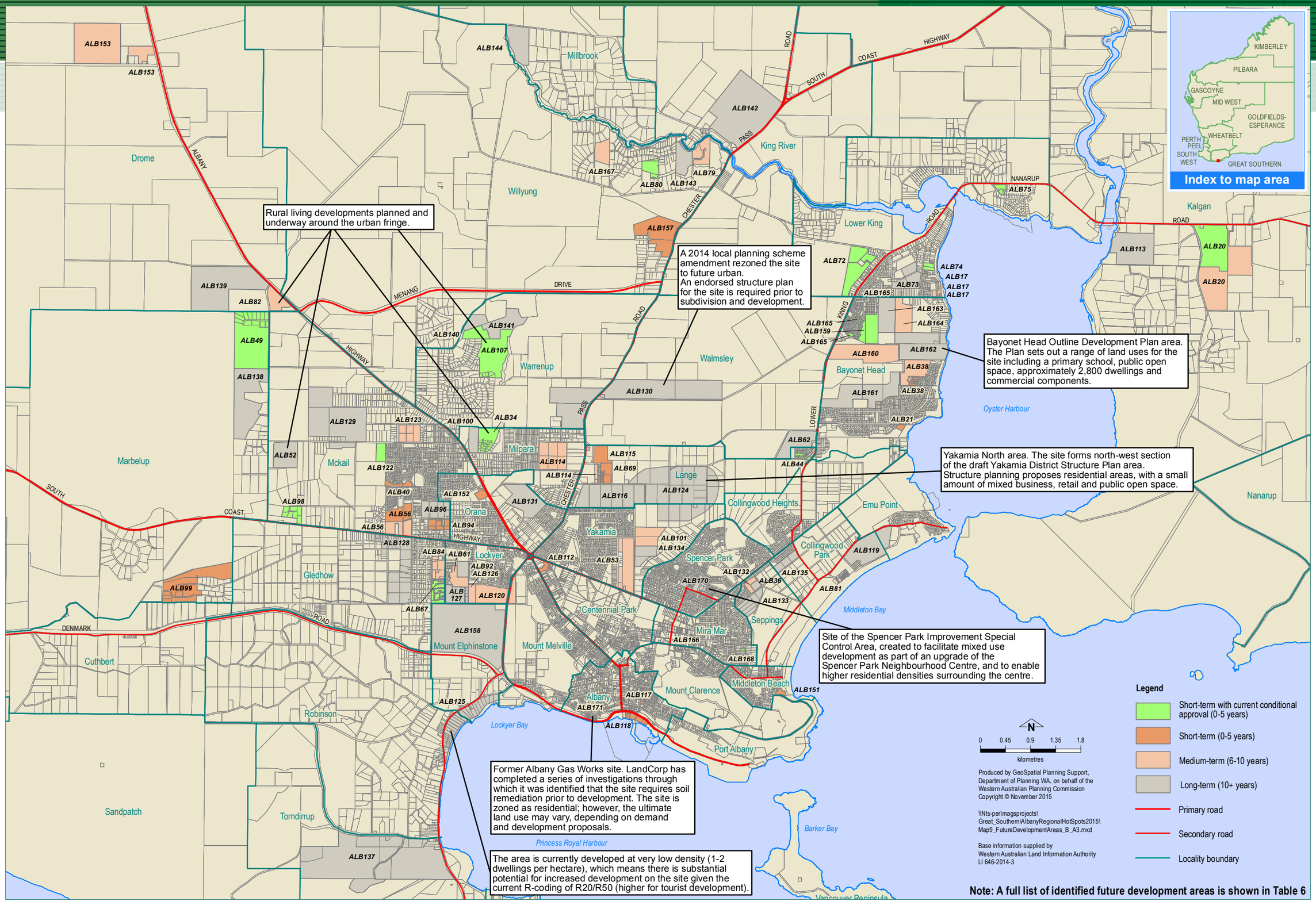
Table 6: Project summaries - Albany

Identifier	Location	Suburb	Existing tenure[1]	Purpose	Zoning/planning			Area/yield[2]			Subdivision approvals[3]		Anticipated release[4] (commencing early 2015)			Constraints[5]			Comments
					Current zoning	Amendment required	Other planning under way	Area (ha)	Yield (lots)	Yield (units)	Approvals pending	Current approvals	Short term (0-5 yrs)	Medium term (5-10 yrs)	Long term (10+ yrs)	Concern but resolution anticipated	Critical but resolution anticipated	Critical and resolution not definite	
ALB156	Lot on survey - 200 South Coast Highway	Wellstead	K Moir	Industrial	Light industry	No		5.6	0	0	0	0	0	15	0	MC, E	S		Undeveloped site zoned for light industrial purposes under the local planning scheme. Subdivision application to create 15 lots on the site has recently expired. Concerns were raised during the subdivision process regarding the site's suitability for on-site wastewater disposal.
ALB157	Lot 9000 Copal Road	Willyung	S Negri	Industrial	General industry	No		34.2	0	0	0	12	0	0	0	MC			Un-subdivided portion of the Pendeen Industrial Estate. Site is zoned for general industry under the TPS and is protected by an industrial buffer area (special control area in scheme). The local planning strategy indicated that an expansion of the zone to the west may be possible under suitable conditions. Subdivision is conditionally approved to create 12 industrial lots on the site.
ALB158	Lot on survey - 201 Hanrahan Road	Mount Elphinstone	CSBP Ltd	Industrial	Light industry	No		118									P, MC, W, S, D	E	Site is zoned as light industry under the local planning scheme and is the location of the CSBP fertiliser plant which is currently not in operation. Uses at the site are restricted to fertiliser manufacture and storage under the local planning scheme and as such, the prospect of other uses will require detailed investigations into suitability and an amendment to the scheme.
ALB159	Lots 9005 & 9006 Stranmore Boulevard	Bayonet Head	WA Housing Authority, Lowe Pty Ltd	Residential	Future urban	No	Bayonet Head Outline Development Plan	17	160	160	0	160	160	0	0	MC			Site forms part of the Bayonet Head outline development plan area. Conditional subdivision approval has been granted to create 160 lots for residential purposes on the site.
ALB160	Lot 42 Sibbald Road	Bayonet Head	WA Housing Authority	Residential	Future urban, general agriculture	Yes	Bayonet Head Outline Development Plan	35.8	315	315	0	315	0	315	0	MC		E	Site forms part of the Bayonet Head outline development plan area. Portions of the site are to be preserved to protect native vegetation.
ALB161	Lots 1000 &1001 Lower King Road , Lot 1 Jason Road & Lot476 Sibbald Road	Bayonet Head	WA Housing Authority, Lowe Pty Ltd & E Cameron	Residential	Future urban, general agriculture	Yes	Bayonet Head Outline Development Plan	43.0	600	600	0	0	0	0	600	MC	P, Z, E		Site forms part of the Bayonet Head outline development plan area. Portions of the site are to be preserved to protect native vegetation.
ALB162	Lots 2, 3 & 286 Alison Parade	Bayonet Head	WA Housing Authority, Lowe Pty Ltd, J Pearce, J Greer	Residential	General agriculture	Yes	Bayonet Head Outline Development Plan	42.8	385	385	0	0	0	0	385	MC	P, Z,	E	Site forms part of the Bayonet Head outline development plan area. Portions of the site are to be preserved to protect native vegetation.
ALB163	Lot 39 Elizabeth Street	Bayonet Head	A Kehal, J Sumich	Residential	General agriculture	Yes	Bayonet Head Outline Development Plan	18.8	170	170	0	0	0	0	170	MC	P, Z,	E	Site forms part of the Bayonet Head outline development plan area. Portions of the site are to be preserved to protect native vegetation.
ALB164	Lot 38 Elizabeth Street	Bayonet Head	WA Housing Authority, Lowe Pty Ltd	Residential	General agriculture	Yes	Bayonet Head Outline Development Plan	16.7	150	150	0	0	0	150	0	MC	P, Z,	E	Site forms part of the Bayonet Head outline development plan area. Portions of the site are likely to be preserved to protect native vegetation.
ALB165	Lots 9006	Bayonet Head	WA Housing Authority, Lowe Pty Ltd	Residential	Residential, future urban	No	Bayonet Head Outline Development Plan		29	29	0	29	29	0	0	MC			Site forms part of the Bayonet Head outline development plan area. Development at the site is underway.
ALB166	Lots 30, 102 & 251 Cockburn Road	Mira Mar	Daly and Shaw Pty Ltd	Residential	Residential	No		1.0	31	31	0	31	31	0	0	MC, E, H			Survey strata subdivision conditionally approved in 2014 to create 31 lots for residential purposes with one common property lot for access.
ALB167	Pt Lot 9041 Wilyung Road	Wilyung	B Lowrie	Special residential	Special residential	No		10.2	6	6	0	0	0	6	0	MC, E			Undeveloped area zoned for special residential purposes. Most of this area has been developed.
ALB168	Lots 33 & 34 Mcleod	Mira Mar	I, M & J Broughton	Residential	Residential	No		0.5	8	8	0	8	8	0	0	E			Survey strata subdivision conditionally approved to create 8 lots for residential purposes at the site.
ALB169	Lots 870, 876 & 877 John Street. Lots 873-875 Morris Road	Milpara	Hysnex Pty Ltd	Light industrial	Light industrial	No	Lots 870, 876 & 877 John Street. Lots 873-875 Morris Road Development Guide Plan	24.3	71	0	0	0	0	0	0	MC, E, S			A development guide plan has been prepared for the City of Albany proposing 71 lots for light industrial purposes. No subdivision activity has been initiated as yet.
ALB170	Numerous lots, Spencer Park Shopping centre area	Spencer Park	Department of Housing and numerous others	Mixed use	Neighbourhood centre, residential, parks and recreation. (Special control area)	No		31.2	TBC	350	0	0	0	0	350	P	MC		Site of the Spencer Park improvement special control area, created to facilitate mixed use development as part of an upgrade of the Spencer Park Neighbourhood Centre and enable higher residential densities surrounding the centre. Site is zoned R40, R60 & R80 and requires a structure plan/local development plan to be prpared prior to any development.
ALB171	Numerous lots, Amity Quays	Albany	State of WA, Western Australian Land Authority	TBC	Residential	TBC		1.1	TBC	TBC	0	0	0	0	0	MC	E		Former Albany Gas Works site, requiring some remedial works before development can proceed. Land is zoned as residential; however, the ultimate land use may depend on demand at the time of development.

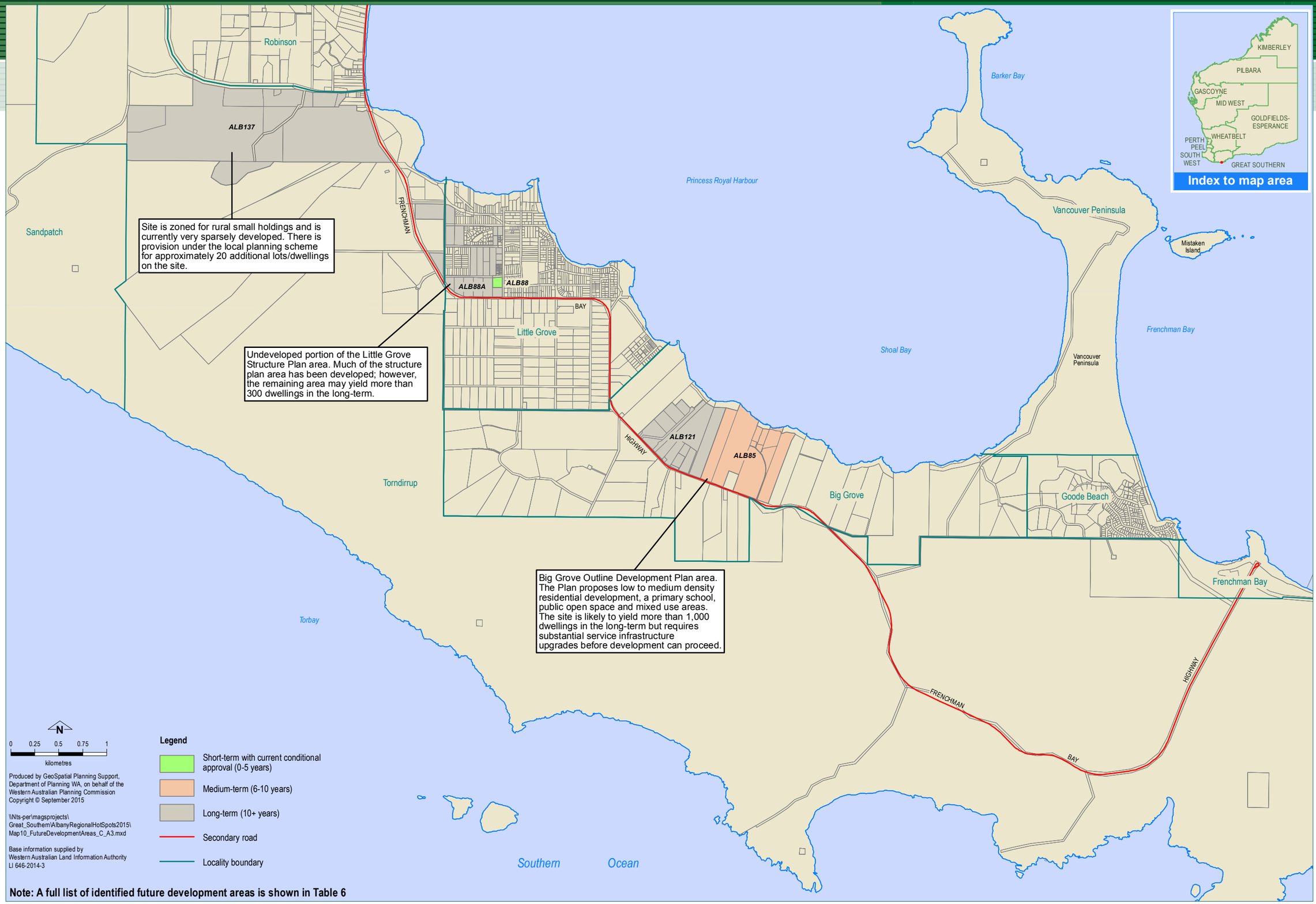
1 Organisation or individual/s
2 In some cases the yield for the project is indicative only. Final lot/dwellings yields will be determined by further detailed planning.
3 Refers to the number of lots/units with current subdivision or strata approval, and the number of lots/units for which a subdivision/strata application has been lodged but which is yet to be determined (pending). Does not include local government development approvals.
4 Estimate only. In most cases the precise timing of lot release is uncertain. This could be for reasons such as market conditions, demand/supply of services or a requirement to resolve issues and constraints.
5 Constraints and issues codes: Drainage (D), environmental (E), heritage (H), land assembly (L), market conditions (MC), planning (P), power (Pw), sewer (S), water (W), topography and geology (TG), mining lease (M) and zoning (Z).
Data is current as at mid-2015.



Note: A full list of identified future development areas is shown in Table 6



Note: A full list of identified future development areas is shown in Table 6



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Base information supplied by Western Australian Land Information Authority
LI 646-2014-3

Note: A full list of identified future development areas is shown in Table 6

6.10 Adequacy of supply

As illustrated by the dwelling approvals data in this document, real demand for housing fluctuates considerably over time. When estimating future demand, the number of additional dwellings required is estimated based on the forecast number of additional residents, and the forecast household size (2.48 persons per dwelling).[6]

This demand projection is based on the *WA Tomorrow* Band C population forecasts. Under this scenario, the population of Albany (SUA) is projected to increase by an average of 400 residents per year to 2026, requiring the construction of 161 new dwellings per annum (assuming an average of 2.48 residents per dwelling).

Of the future development areas identified in this document, the anticipated dwelling yield within five years sums to 931; comfortably higher than the 805 dwellings likely to be required under this projection, even allowing for a significant vacancy rate. Many of the lots proposed for development in the short-term are in the Bayonet Head-Lower King area.

As the timeframe grows longer, the divergence between forecast demand and stock of development sites grows larger. Medium-term (5-10 years) future development areas identified in this report are anticipated to yield an estimated 1,571 dwellings, almost double the 805 dwellings that would be required to house the 2,000 additional residents forecast to arrive during that time.

Longer-term population forecasts are less reliable and none have been modelled at the SA2 geography past 2026. However, if the forecast rate of growth to 2026 was extrapolated out to 2035 to gauge future underlying demand, 1,610 dwellings would be required to house additional residents in the long-term (10-20 years). Future development areas identified in this document over a 10+ year time frame are projected to yield 8,017 dwellings – approximately five times as many as are forecast to be required.

Population growth of the sort forecast under the *WA Tomorrow* Band C growth scenario to 2026 could theoretically be supported by the future development areas identified in this document for approximately 62 years. The vast majority of these sites are already zoned for residential or urban purposes.

The projects identified in the future development areas, maps and tables of this document include areas where there has been some intent demonstrated (on the part of developers, planners or Government) that the land will likely be developed with five or more dwellings. There are numerous projects that have not been included in the future development areas data, but which are likely to be developed, particularly within a 50+ year time-frame (through which the identified future development areas are likely to support growth).

In addition to the future development areas identified in section 6.9 of this document, numerous opportunities for development have been identified through existing urban lots and through subdivision of lots zoned for residential purposes. This background development potential has the capacity to substantially extend the temporal land supply of the Albany SUA.

The *City of Albany Local Planning Strategy* identifies large long-term growth areas expected to yield approximately 28,500 dwellings. Overlaying the *City of Albany Local Planning Strategy* map on cadastral and future development areas it is possible to identify the stock of these future urban areas that are not developed or identified in the future development dataset. Based on dwelling yield estimates in the *City of Albany Local Planning Strategy*, a further 17,500 dwellings can be developed on the identified future development areas.

[6] Australian Bureau of Statistics, *Household and Family Projections, Australia 2006–2031*, series 2, catalogue number 3236.0, June 2010

The data and timeframes shown in Table 7 are very much hypothetical. There is no certainty regarding exactly how many dwellings will be required to accommodate population growth in 2016, let alone in 60+ years' time. However, the fact that hypothetical timeframes extend so far into the future, illustrates the degree of oversupply of land identified for urban development in and around Albany's existing urban form. In essence, current stocks of land identified for future development exceed what is likely to be required in the next 20 years by a great measure.

Table 7: Combined measures – theoretical dwelling yields (approximate for Albany SUA)

	Time frame	Dwelling yield	Estimated temporal land supply*	Estimated population increase supported**
Vacant lots***	Short-term	1,170	5-7	2,900
Identified development areas	Short-term	940	6	2,300
Identified development areas	Medium-term	1,560	10	3,900
Identified development areas	Long-term	7,460	46	18,500
Latent infill potential****	Short, medium or long-term	6,970	43	17,300
Strategic future urban areas*****	Long-term	17,810	110	44,200

Source: Department of Planning (2015)

* Assuming a requirement of 161 dwellings per annum

** Assuming 2.48 residents per dwelling

*** Based on a 75 per cent take up and one dwelling per lot

**** Number adjusted to avoid double counting and 50 per cent take up rate of high lot potential assumed

***** Numbers adjusted to avoid double counting

7 Rural living

There is substantial demand for rural living property in the Albany area. The numerous rural and natural features around Albany make this type of development a popular option. There are large tracts of land zoned for rural residential, special residential, conservation and rural small holdings purposes (all considered rural living for the purposes of this report) within a short drive of the Albany town centre, which give buyers the option of living in a rural setting and working in a regional centre.

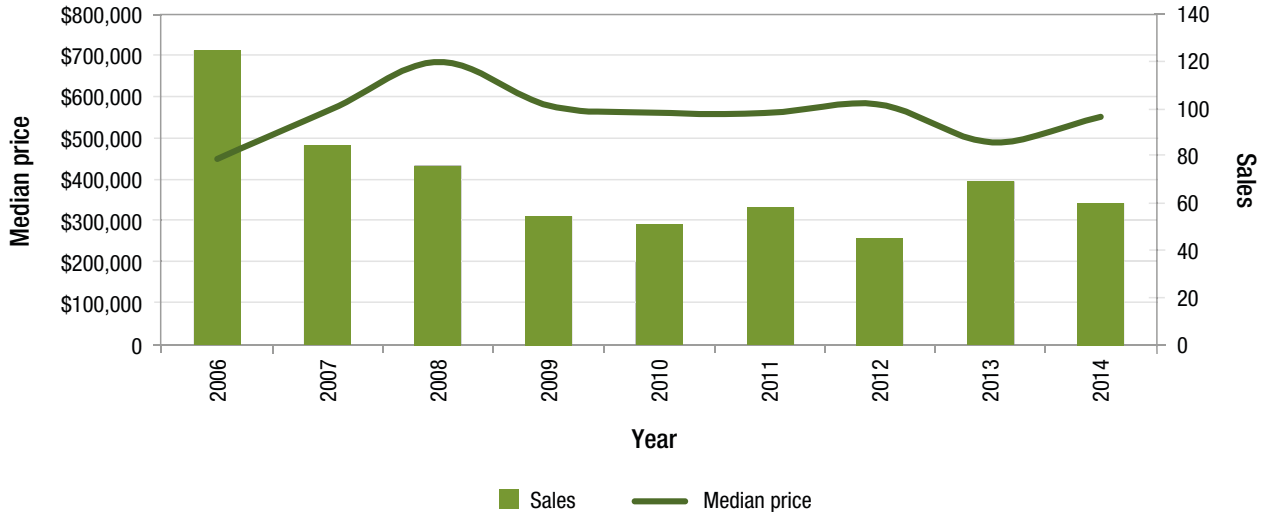
Expanding this sector of the housing market is not without its drawbacks. If mismanaged, rural living land can encroach on productive farm land or areas of proposed future urban growth. There are also various environmental issues associated with rural living including increased bushfire danger, impacts on native flora and fauna and wastewater management.

There can also be complications regarding the provision of infrastructure to rural living communities. The draft *Great Southern Regional Planning and Infrastructure Framework* proposes the development of standard guidance for suitable water supply for rural living developments.

Starting with the March quarter 2007, REIWA has moved to segment its market analysis into house and land sales above and below one hectare. This step has been taken to reduce the influence that the higher price of larger lifestyle lots has on overall market medians.

Figure 27 shows property sales and median sales price for homes on lots larger than one hectare from 2006 to 2014 in the Great Southern region. While this only represents a small proportion of total rural living property, the figure shows a reduction in the volume of sales for this type of property from 2006.

Figure 27: Lifestyle house sales – Great Southern region (2006 - 2014)



Source: REIWA (2014) *June Quarter Market Updates 2007 – 2014*

Figure 29 illustrates volumes of subdivision for rural living purposes in the City of Albany from 2004 to 2014. During that period, fewer than half of the lots granted conditional approval proceeded to final approval. Figure 29 also shows that – broadly speaking – there has been a decline in rural living subdivision activity over the decade to December 2014.

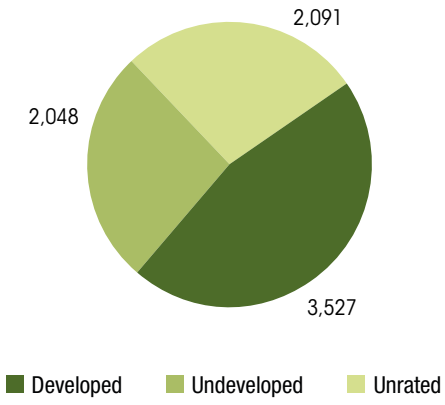
Using the IRIS land supply model, major rural living land use zones are grouped together to provide a snapshot of rural living land stocks in the City of Albany. As at January 2015, the model showed a stock of 7,665 hectares of land zoned for rural living purposes, 3,526 hectares (46 per cent) of which was deemed to be developed. Based on the IRIS model, 4,139 hectares of residential land is either vacant or not rated by the Valuer General's Office (Figure 30).

For the purposes of this study unrated land, zoned for residential development is considered to be available for future development.

Using historical subdivision data and the IRIS model it is possible to calculate the amount of land zoned for rural living purposes that is consumed, or developed (i.e. serviced with infrastructure and subdivided) each year. The results of this analysis showed considerable variation in development activity, with an average of 252 hectares of rural living land in Albany consumed per annum (Figure 30). If consumption were to continue at this rate, it would take approximately 20 years to consume the volume of undeveloped and unrated land.

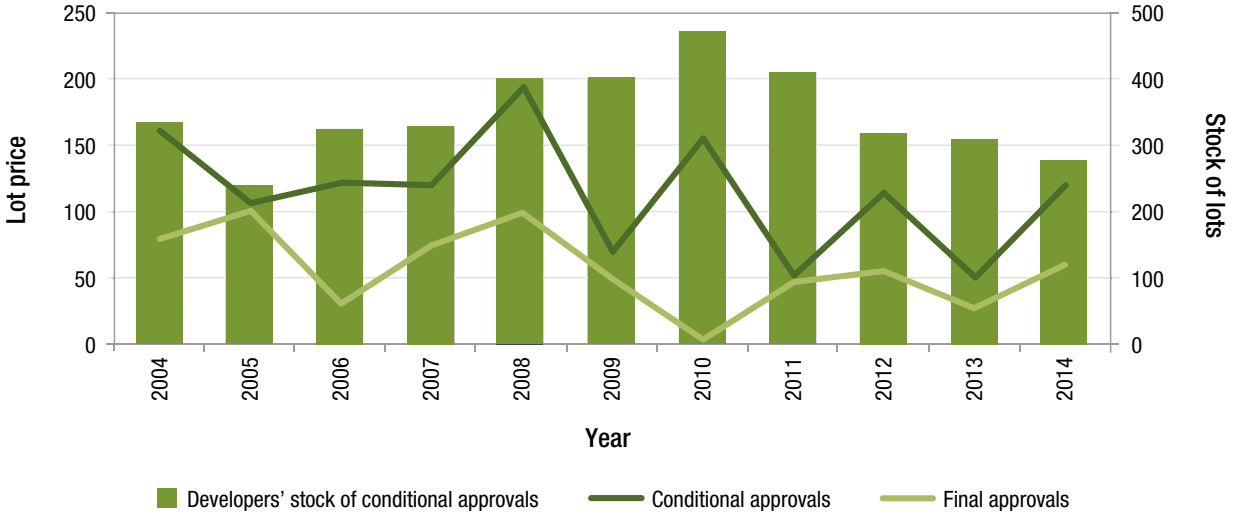
The stock of land zoned for rural living purposes in the City of Albany is likely to be sufficient to meet demand for an extended period. The existing stock of land, coupled with the complications that can arise from an over-supply of rural living land around the urban fringe, indicate that future rezoning should be undertaken sparingly.

Figure 28: Stock of land (hectares) zoned for rural living purposes – Albany (LGA)



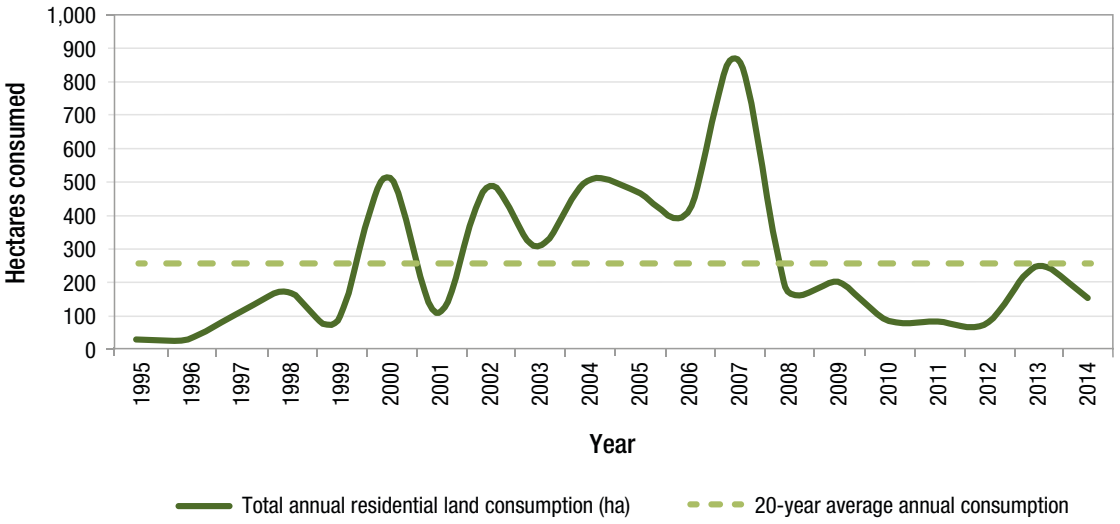
Source: Department of Planning (2015) *Integrated Regional Information System*

Figure 29: Rural living subdivision activity – City of Albany (2004 - 2014)



Source: WAPC (2015) *Unpublished data*

Figure 30: Rural living land consumption – Albany (LGA)



Source: Department of Planning (2015) *Integrated Regional Information System*

8 Industrial

8.1 Key industrial areas

Key industrial areas near the Albany urban area are shown in Map 11.

Mirambeena Strategic Industrial Area (SIA) and Down Road Timber Processing Precinct

The Mirambeena Strategic Industrial Area (SIA) and Down Road Timber Processing Precinct are located 1.5 kilometres apart, off Down Road, approximately 15 kilometres north of Albany. Both estates cater for strategic and heavy industry associated with the downstream processing of local resources within the Great Southern region such as timber, agricultural produce and fisheries.

Although the sites are of regional significance, power is supplied via the Albany town substation, which means that electricity supply is a constraint to the development of various power intensive industries. Water supply may also constrain water intensive projects, although this is also true throughout much of the Albany area.

The Down Road Timber Processing Precinct contains operations for processing local timber products including a woodchip mill and storage facility. The site is linked to Albany Port through a rail spur line connected to the Perth-Albany rail line. There is approximately 66 hectares of undeveloped industrial zoned land at the site; however, proximity to the Marbellup Creek Water reserve may limit the extent to which the remainder of the site can be developed. There are opportunities to expand timber processing operations at the site through projects such as fuel pellets (biomass energy) or the construction of quality timber products.

Approximately 70 hectares of industrial zoned land remain undeveloped at the eastern site of the Mirambeena SIA. This part of the SIA is not currently connected to the port via the rail spur line.

Pendeen

The Pendeen Industrial Estate, on Chester Pass Road, is a 54 hectare site developed for transport and logistics. Approximately 34 hectares of land zoned for 'general industry' remain undeveloped at the site, leaving considerable capacity for expansion. The site is well located with regard to transport linkages, being adjacent to the Albany Ring Road and Chester Pass road.

The *Albany Local Planning Strategy 2010* identifies the area to the west of the existing Pendeen industrial area as a potential industrial expansion area. If, after investigation, the land is deemed suitable for industrial development, it may accommodate a substantial proportion of Albany's industrial expansion in the long-term.

Milpara

The 27 hectare Milpara Industrial Estate on Chester Pass Road primarily consist of manufacturing, warehousing and service industries. There is limited scope for expansion at this site due to the surrounding residential and public purpose land uses; however, a development guide plan has been produced for 24 hectares of under-developed land in the east of the site.

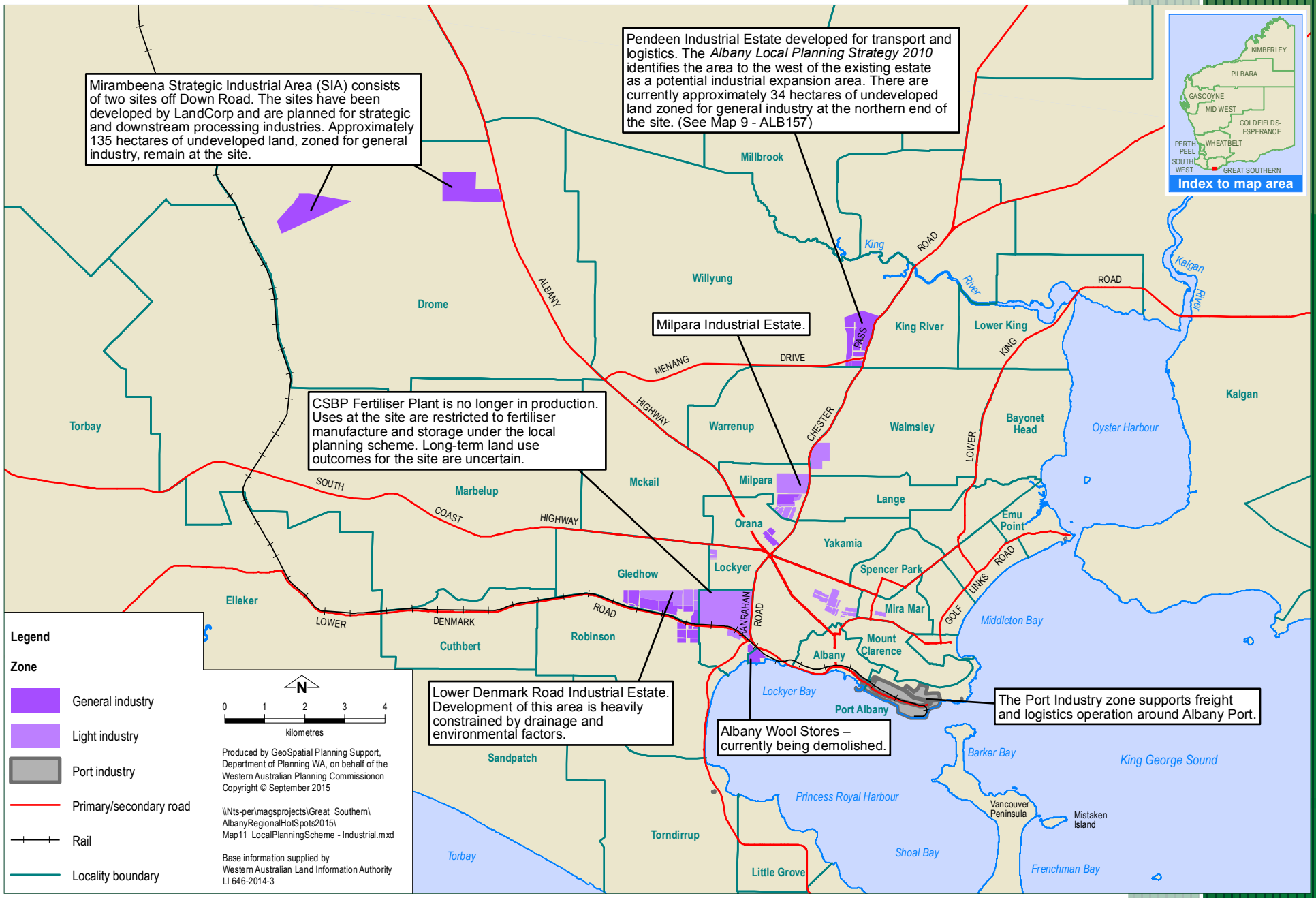
Lower Denmark Road

The Lower Denmark Road Industrial Estate comprises of 116 hectares of general and industrial zoned land in close proximity to the Albany CBD. Although the area is located at a site with numerous strategic advantages (it is near to the port, CBD, rail and road networks), further development of this area is constrained by environmental factors. There is one particularly large lot on the site that is the site of the former CSBP fertiliser plant.

The old Albany Wool Stores – now disused and in the process of demolition – are also located in the Lower Denmark Road area.

Port industry zone

The port industry zone supports freight and logistics operation around Albany port. There is essentially no capacity for expansion at the site as it is constrained on all sides by Mount Clarence, Princess Royal Harbour and the Albany town centre.


Mirambeena Strategic Industrial Area (SIA) consists of two sites off Down Road. The sites have been developed by LandCorp and are planned for strategic and downstream processing industries. Approximately 135 hectares of undeveloped land, zoned for general industry, remain at the site.
Pendeen Industrial Estate developed for transport and logistics. The *Albany Local Planning Strategy 2010* identifies the area to the west of the existing estate as a potential industrial expansion area. There are currently approximately 34 hectares of undeveloped land zoned for general industry at the northern end of the site. (See Map 9 - ALB157)
Milpara Industrial Estate.
CSBP Fertiliser Plant is no longer in production. Uses at the site are restricted to fertiliser manufacture and storage under the local planning scheme. Long-term land use outcomes for the site are uncertain.
Lower Denmark Road Industrial Estate. Development of this area is heavily constrained by drainage and environmental factors.
Albany Wool Stores – currently being demolished.
The Port Industry zone supports freight and logistics operation around Albany Port.
Index to map area
KIMBERLEY
PILBARA
GASCOYNE
MID WEST
GOLDFIELDS-ESPERANCE
PERTH PEEL
WHEATBELT
SOUTH WEST
GREAT SOUTHERN
Millbrook
Willyung
Drome
Torbay
Warrenup
Walmsley
Bayonet Head
Oyster Harbour
Kalgan
King River
Lower King
Mckail
Marbelup
Milpara
Lange
Orana
Yakamia
Emu Point
Spencer Park
Gledhow
Lockyer
Elleker
Cuthbert
Robinson
Mira Mar
Mount Clarence
Albany
Middleton Bay
Lockyer Bay
Port Albany
Barker Bay
King George Sound
Princess Royal Harbour
Vancouver Peninsula
Mistaken Island
Sandpatch
Torndirrup
Shoal Bay
Little Grove
Frenchman Bay
Legend
Zone
General industry
Light industry
Port industry
Primary/secondary road
Rail
Locality boundary
N
0 1 2 3 4
kilometres
Produced by GeoSpatial Planning Support, Department of Planning WA, on behalf of the Western Australian Planning Commissionon
Copyright © September 2015
\\Nts-per\magsprojects\Great_Southern\AlbanyRegionalHotSpots2015\Map11_LocalPlanningScheme - Industrial.mxd
Base information supplied by Western Australian Land Information Authority
LI 646-2014-3

8.2 Land supply

Using the IRIS land supply model, major industrial land use zones are grouped together to provide a snapshot of commercial land stocks in the City of Albany, as at January 2015. Land use categories included in this analysis include:

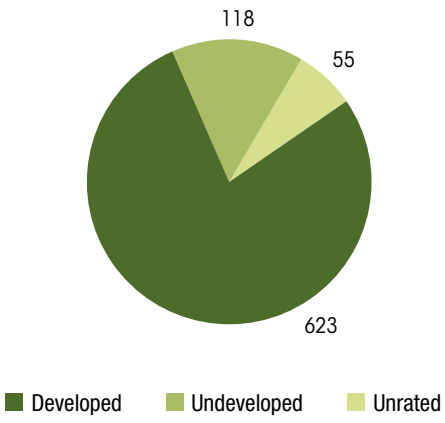
- general industry;
- light industry; and
- port industry

The model showed a stock of 797 hectares of land zoned for industrial purposes, 623 hectares (78 per cent) of which was deemed to be developed (Figure 31). Based on the IRIS model, 174 hectares of industrial land that is either vacant or not rated by the Valuer General's Office. For the purposes of this study, unrated land zoned for industrial development is considered to be available for future development.

Analysis showed a greater degree of variation for industrial land consumption than for residential or rural living development. An average of 25 hectares per annum were consumed through industrial development in the City of Albany in the 20 years to 2014, with annual consumption varying from a maximum of 189 hectares in 2008 to zero in 2009 (Figure 32).

Figure 33 shows data for subdivision activity in the City of Albany from 2004 to 2014. The analysis shows that there are typically a much greater number of industrial lots granted conditional approval than reached final approval (approximately three times as many). Figure 33 also illustrates the reduction in industrial subdivision activity in recent years, with just 21 lots granted final approval in the six years to 2014.

Figure 31: Stock of land (hectares) zoned for industrial purposes – Albany (LGA)



Source: Department of Planning (2015) *Integrated Regional Information System*

8.3 Summary

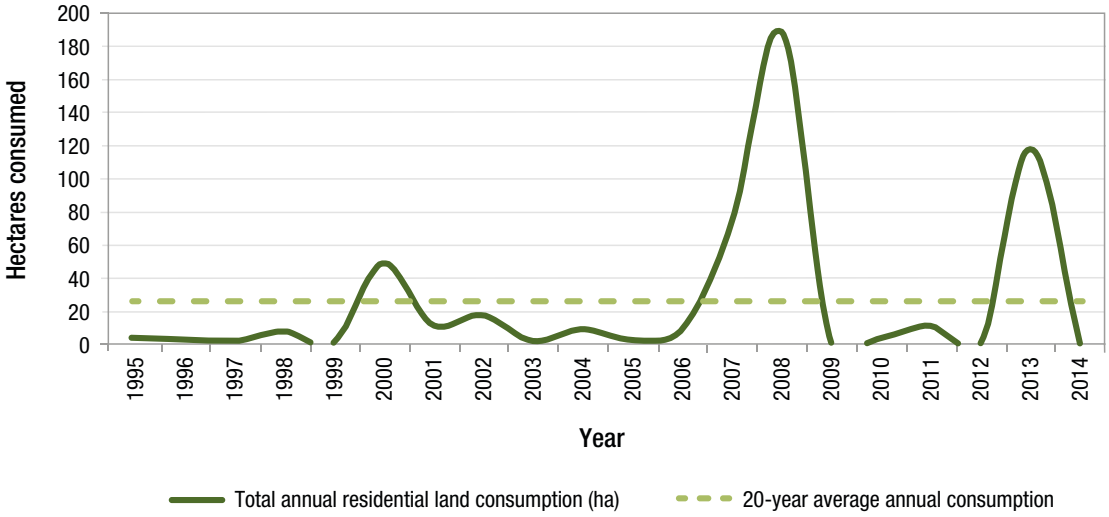
As discussed previously, the amount of land consumed through industrial development is highly variable, relative to residential land consumption. It is therefore important to maintain a suitable industrial land bank around key regional centres, in order to ensure there are sufficient stocks of industrial land available to facilitate growth during periods of heightened demand.

Current stocks of industrial land are small relative to the very large amount of land that has been set aside for future urban purposes. Although there is no immediate requirement to rezone land for industrial purposes, it will be important to identify land that is suitable for future industrial development to mitigate future land use conflict.

Most of the undeveloped land zoned for industrial purposes in Albany is located in the Pendeen industrial estate, the Down Road Timber Processing Precinct and the Mirambeena Strategic Industrial Area. In addition, the *Albany Local Planning Strategy 2010* identifies industrial growth areas to the west of Pendeen and north of Mirambeena. The stock of available land at these sites, coupled with local government strategy, suggest that, should those industrial investigation areas be confirmed as suitable, much of Albany's industrial expansion will be accommodated in these areas into the long-term.

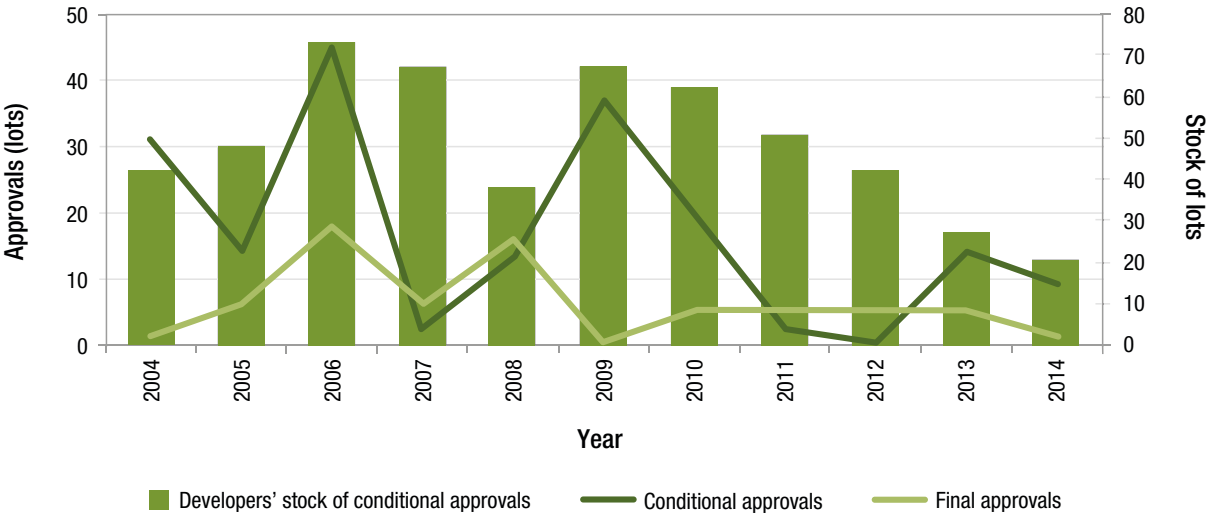
Pracsys, in conjunction with LandCorp, the City of Albany and Shires of Denmark, Plantagenet and Cranbrook are currently undertaking an Industrial Lands Study for the region to shore up industrial land supplies and enhance synergies between existing and proposed operations.

Figure 32: Industrial land consumption – Albany (LGA)



Source: Department of Planning (2015) *Integrated Regional Information System*

Figure 33: Industrial subdivision activity – City of Albany (2004 - 2014)



Source: WAPC (2015) *Unpublished data*

9 Commercial

9.1 Key commercial areas

Key commercial areas near the Albany urban area are shown in Map 12.

Regional Town Centre

The Albany Central Business District is the primary commercial centre of Albany and the broader Great Southern region. The centre is comprised of four main areas:

- York Street, the traditional civic core;
- The southern section of York Street and Stirling Terrace representing the recreation and tourism precinct;
- The Albany Plaza shopping centre; and
- The light industrial/mixed business precinct north of the town centre.

A Masterplan was prepared in 2010 to guide the future growth of the town centre over the next 20 years and further strengthen its role as a regional centre.

Neighbourhood centres

There are three neighbourhood centres within the Albany local government area; the Albany Brooks Garden in Lange (the largest of the three), the North Road Shopping Centre in Yakamia and Spencer Park Shopping Centre in Spencer Park (being the smallest). A precinct plan has been prepared to facilitate the renewal of the Spencer Park centre. The plan proposes a commercial core surrounded by a mixed use precinct and high density residential development.

In addition to the existing centres, development is underway on new neighbourhood centres in Orana and Bayonet Head.

The centre in Orana will include a cinema, Coles supermarket, several smaller retail/dining outlets and a large parking area with more than 300 bays.[7] The centre, which is anticipated to create approximately 100 new jobs is expected to open mid-2015.[8]

The Bayonet Head Shopping Centre opened in 2013, with one Woolworth's supermarket and spaces for 10 specialty stores. However, due to an ongoing dispute over aspects of the centre's construction, Woolworths remain (as at March 2015) the only tenant.

Bayonet Head North Shopping Centre may also be developed as a small neighbourhood centre in the short-term.

Centennial Park area

Centennial Park, Orana and Chester Pass Road which have traditionally comprised service industrial uses, are transitioning to showroom commercial and retail uses. To facilitate this transition, the areas have been identified as potential mixed business precincts.

Middleton Beach

The former Esplanade Hotel at Middleton Beach has been identified as an opportunity to develop a mixed use precinct. The site was acquired by the State Government and an Improvement Plan has been prepared to progress redevelopment of the site. Public comment has been sought on how best to utilise the site and planning is now underway.

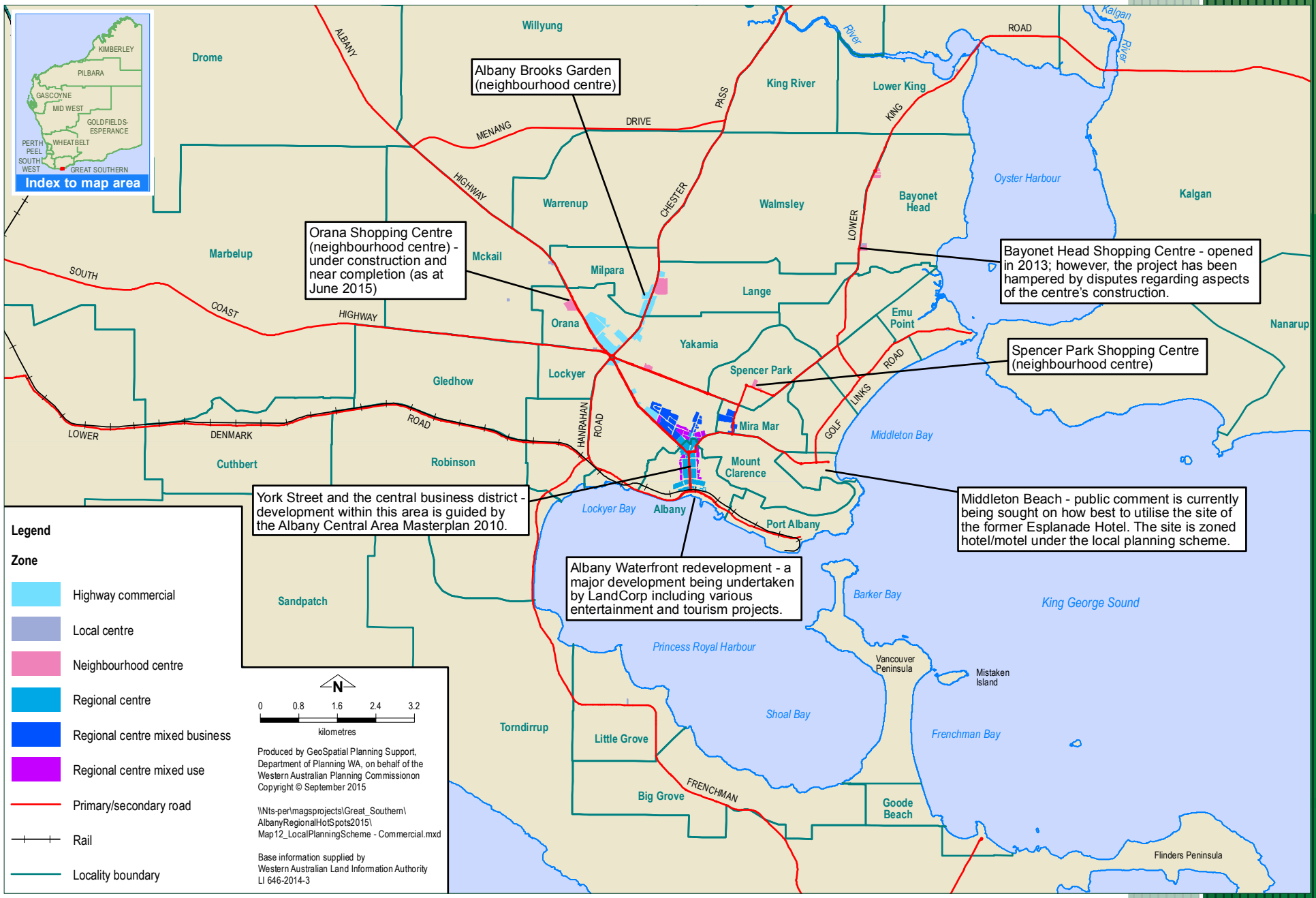
Albany Waterfront

The Albany Waterfront redevelopment represents a major revitalisation project led by LandCorp in partnership with other State Government agencies and the City of Albany. The project includes increasing the capacity of the harbour, improvements to the jetty, an entertainment precinct, retail and office development and tourist accommodation consisting of short stay apartments with an opportunity for a hotel. Once complete, the redevelopment will provide better connectivity between the Albany town centre and the foreshore.

[7] Great Southern Joint Development Assessment Panel Agenda: 28 July 2014

[8] Albany Advertiser (24 Feb 2015) *Supermarket Opening Soon*

Map 12: Key commercial areas



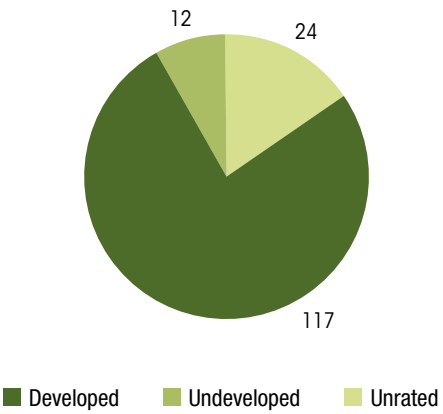
9.2 Land supply

Using the IRIS land supply model, major commercial land use zones are grouped together to provide a snapshot of commercial land stocks in the City of Albany, as at January 2015. Land use categories included in this analysis include:

- local centre;
- neighbourhood centre;
- regional centre;
- highway commercial;
- regional centre mixed business;
- regional centre mixed use; and
- public use.

The IRIS land supply model showed that, as at January 2015 there was a stock of 152 hectares of land zoned for commercial purposes, 117 hectares (76 per cent) of which was deemed to be developed. Based on the IRIS model, 37 hectares of commercial land is either vacant or not rated by the Valuer General's Office.

Figure 34: Stock of land (hectares) zoned for commercial purposes – Albany (SUA)



Source: Department of Planning (2015) *Integrated Regional Information System*

A relatively small amount of land has been consumed for commercial purposes in Albany during the 20 years to 2014, with an average annual consumption of 3.6 hectares per annum and a maximum annual consumption of 13 hectares in 2008 (Figure 35).

Figure 36 illustrates how little commercial subdivision has occurred in Albany during recent years. Final approval was granted to create just 15 lots for commercial purposes in Albany in the five years to December 2014.

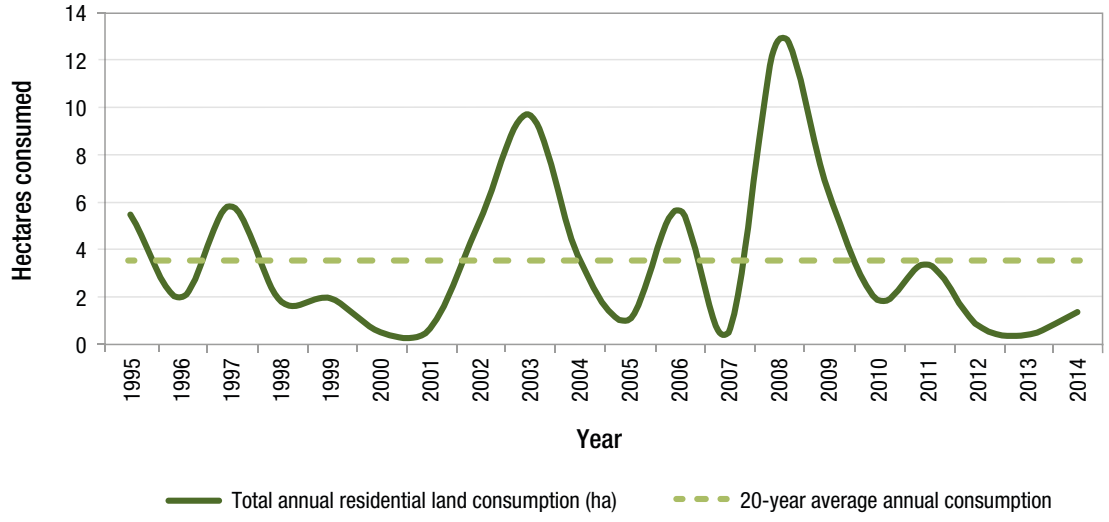
9.3 Summary

Although there are not large stocks of undeveloped land zoned for commercial purposes in Albany, the likely consumption rate of commercial land is likely to be reasonably modest. There is sufficient land available in the short to medium-term to meet demand in Albany, particularly given that two sizeable new shopping centres have recently been developed in Orana and Bayonet Head.

While the development of suburban centres such as these is important in servicing the growing city, it is important that they do not overly detract from the attraction of the central business district. The preservation of the York Street area as Albany's urban focal point will play a major role in enhancing the city's presence as a major regional centre and promoting tourism.

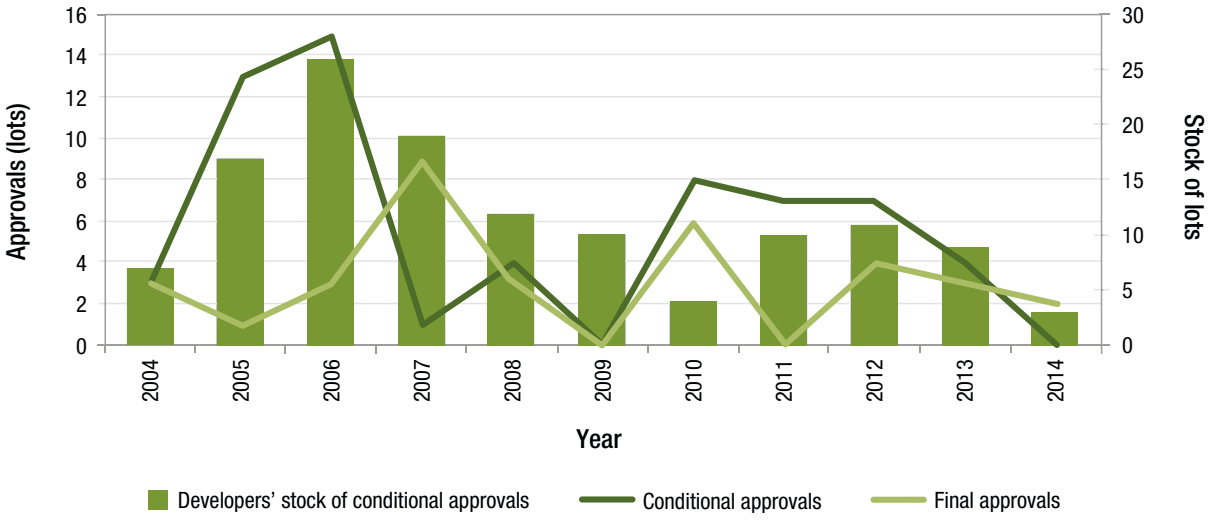
Longer-term it will be important to identify land for commercial purposes at the structure planning stage of development. This will ensure there are appropriate sites allocated for local and neighbourhood centres as the sub-region's population increases. The City of Albany has undertaken broader commercial centre planning through their *Activity Centres Planning Strategy*.

Figure 35: Commercial land consumption – Albany (SUA)



Source: Department of Planning (2015) *Integrated Regional Information System*

Figure 36: Commercial subdivision activity – City of Albany (2004-2014)



Source: WAPC (2015) *Unpublished data*

10 Service infrastructure

The following section outlines the broad service infrastructure capacity issues for the Albany region and outlines proposed upgrades likely to be required to facilitate future residential, commercial and industrial growth in the Albany urban area.

10.1 Water

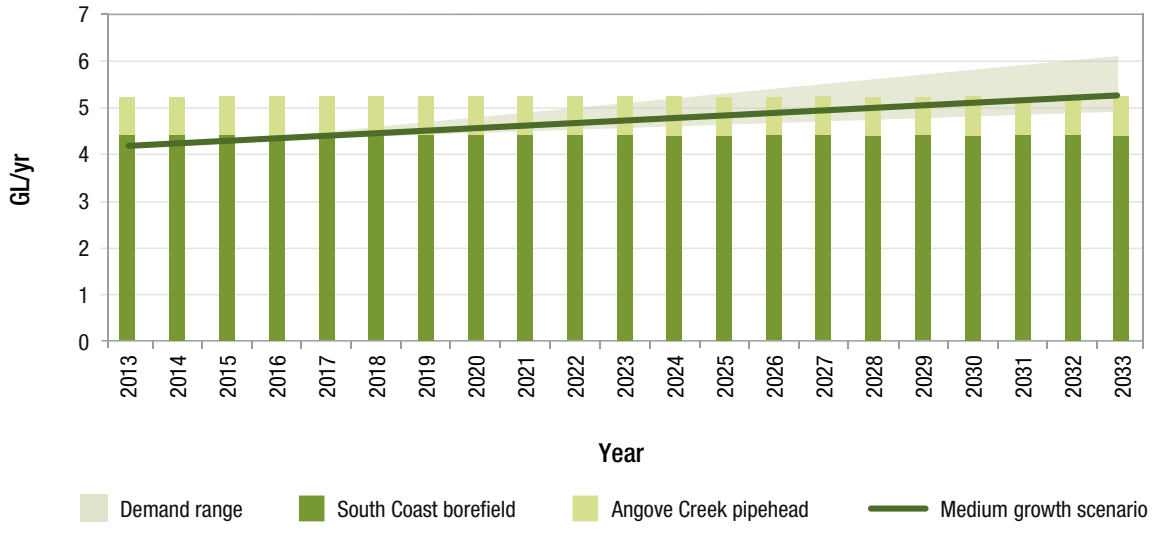
The Lower Great Southern Towns Water Supply Scheme (LGSTWSS) services the towns of Albany, Narrikup, Mount Barker and Kendenup, as well as farms adjacent to the scheme main. Water for the scheme is obtained from the South Coast borefield south-west of Albany and the Angove Creek Pipehead Dam at Two People's Bay. As most of Albany's water supply is drawn from the aquifer, it is important to manage the drinking water protection area, as it is prone to pollution from surface elements and salt water.[9]

Water is treated locally and pumped to a series of tanks at high points around Albany that feed into the reticulated town network. Residential water use constitutes approximately 70 per cent of total consumption in the Albany townsite.

In 2013, more than 4 GL of water was consumed across the entire Lower Great Southern towns water supply scheme, 2.7 GL of which was consumed in the in the Albany scheme area (Figure 37). Securing adequate water supplies for future public consumption, industry and agriculture is an important issue that will need to be addressed to support future urban growth in Albany and across the Great Southern Region.

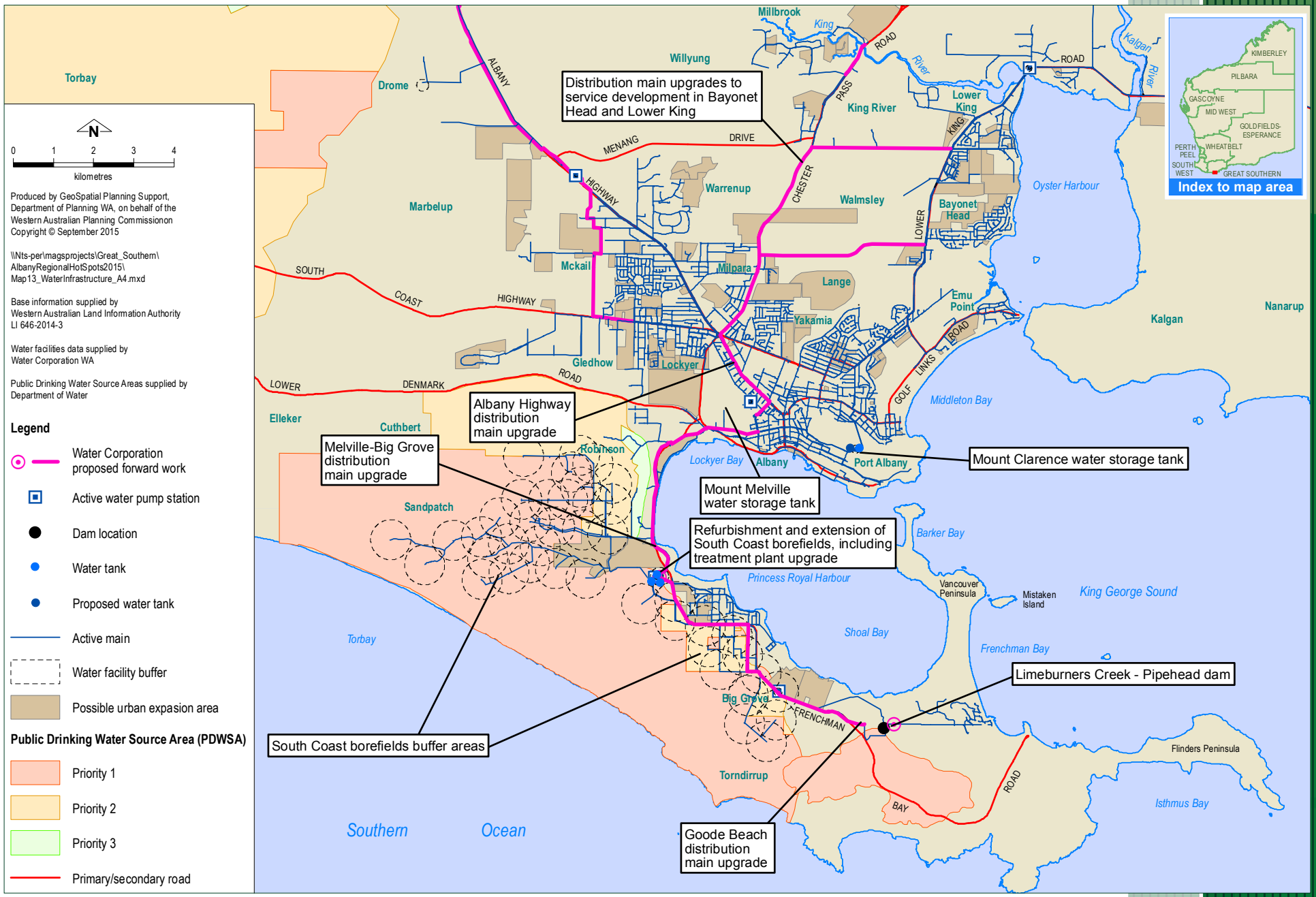
Department of Water projections indicate that, under a high-growth scenario an additional water supply will be required by 2023. The Department of Water and the Water Corporation are working to develop longer-term supplies. Securing adequate water supplies for future public consumption, industry and agriculture is an important issue that will need to be addressed to support future urban growth in Albany and across the Great Southern Region.

Figure 37: Projected water demand to 2033 and current water supplies for the Lower Great Southern towns water supply scheme



Source: Department of Water (2015) URL: http://www.water.wa.gov.au/PublicationStore/first/108261.pdf

[9] Albany Local Planning Strategy 2010


Distribution main upgrades to service development in Bayonet Head and Lower King
Albany Highway distribution main upgrade
Melville-Big Grove distribution main upgrade
Mount Melville water storage tank
Mount Clarence water storage tank
Refurbishment and extension of South Coast borefields, including treatment plant upgrade
South Coast borefields buffer areas
Limeburners Creek - Pipehead dam
Goode Beach distribution main upgrade
Index to map area
N
0 1 2 3 4
kilometres
Produced by GeoSpatial Planning Support, Department of Planning WA, on behalf of the Western Australian Planning Commissionon
Copyright © September 2015
\\Nts-per\magsprojects\Great_Southern\AlbanyRegionalHotSpots2015\Map13_WaterInfrastructure_A4.mxd
Base information supplied by Western Australian Land Information Authority LI 646-2014-3
Water facilities data supplied by Water Corporation WA
Public Drinking Water Source Areas supplied by Department of Water
Legend
Water Corporation proposed forward work
Active water pump station
Dam location
Water tank
Proposed water tank
Active main
Water facility buffer
Possible urban expasion area
Public Drinking Water Source Area (PDWSA)
Priority 1
Priority 2
Priority 3
Primary/secondary road
Torbay
Drome
Willyung
Millbrook
King River
Lower King
Oyster Harbour
Bayonet Head
Marbelup
Warrenup
Walmsley
Mckail
Milpara
Lange
Yakamia
Emu Point
Kalgan
Nanarup
Gledhow
Lockyer
Elleker
Cuthbert
Robinson
Sandpatch
Lockyer Bay
Albany
Port Albany
Middleton Bay
Barker Bay
Princess Royal Harbour
Vancouver Peninsula
Mistaken Island
King George Sound
Shoal Bay
Frenchman Bay
Big Grove
Torndirrup
Flinders Peninsula
Isthmus Bay
Southern Ocean
KIMBERLEY
PILBARA
GASCOYNE
MID WEST
GOLDFIELDS-ESPERANCE
PERTH PEEL
WHEATBELT
SOUTH WEST
GREAT SOUTHERN

Plans are underway to upgrade the existing bore monitoring network to accurately assess and map local groundwater resources to garner a better understanding of the adequacy of supplies. Aside from expanding the South Coast borefield (should that prove suitable), other options to increase potable water supply to the scheme include:

- seawater desalination; or
- aquifer storage and recovery (ASR) of water from the Marbellup Brook.

If demand for water in the scheme area exceeds sustainable groundwater extraction capacity, the most likely alternative source of water is a desalination plant.[10] Although such a solution would come with high energy demands and operating costs it would not be climate dependent, which is an important factor given the drying climate along the south coast.

The urgency of delivering an additional water source for the Albany area has been mitigated by improved efficiencies in the region. Although the population has increased, water demand has declined in recent years, reducing from 5.3 GL/year in 2007 to 4.2 GL/year in 2013.

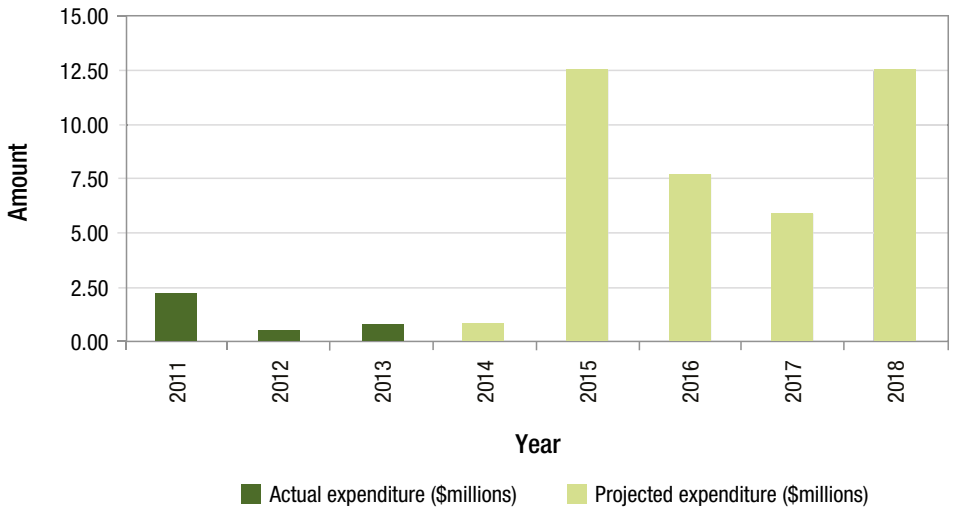
The Water Corporation is undertaking several projects to secure sustainable water supplies for the Albany area (Figure 38) including:

- Refurbishment and extension of the South Coast borefields, and an upgrade to the South Coast water treatment plant;
- An upgrade to the Two People's Bay Water Treatment Plant; and
- Investigations into a desalination plant in the Albany area.

Figure 38 indicates some of the planned water infrastructure that will be constructed in the future to support ongoing urban development in Albany. The timing of the projects will be driven by the progression of the development.

Aside from the anticipated increase in demand for urban uses, proposed water intensive industries in the Albany area will need to invest in alternative water supplies in order to proceed. Examples of this include the Southdown magnetite iron ore mine, for which Grange Resources would need to construct a desalination plant

Figure 38: Albany water capital investment



Source: Water Corporation (2015) URL http://www.watercorporation.com.au/water-supply-and-services/solutions-to-regional-water-supply/regional-water-and-wastewater-schemes/albany-water-scheme-summary

[10] Department of Water (2014) *Great Southern Regional Water Supply* Strategybeacfront-tourism-hub/5587732

capable of producing up to 12 gigalitres of water per annum to service proposed operations. Horticultural projects likely to require large quantities of water may also be required to draw water from alternative sources.

Potential sources of alternative water supplies include:

- upgrade and reactivation of the Limeburners Creek pipehead dam; and
- new groundwater sources such as Marbellup groundwater and north-west Albany groundwater.

10.2 Wastewater

There are eight sewer districts within the Albany wastewater scheme, all of which are serviced by the Timewell Road Wastewater Treatment Plant (WWTP). There are 42 existing pump stations, including 16 private pump stations. Projected future growth is 1.2 % per annum, based on the historical increase in wastewater connections since 2003.

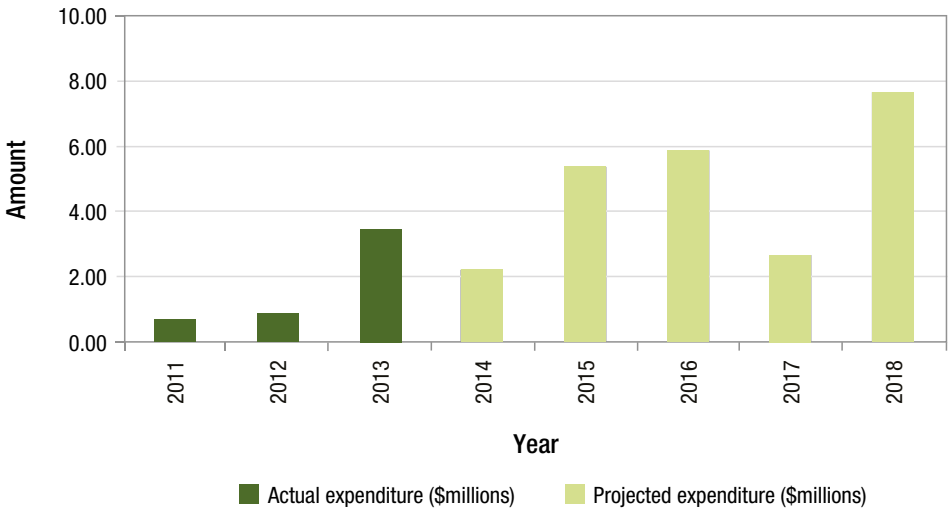
Timewell Road Waste Water Treatment Plant (WWTP) consists of an activated sludge system and is licenced to treat up to 12,000 kilolitres per day. All treated wastewater from the WWTP is reused for woodlot irrigation. It is expected that the plant will require a significant upgrade in order to meet projected increases to flows generated through urban growth.

Projects planned by Water Corporation to cater for future growth in the area include:

- Timewell Road Wastewater Treatment Plant improvements and upgrade;
- Le Grande Avenue Pump station upgrade; and
- New proposed pump stations and pressure mains in the northern area of Albany.

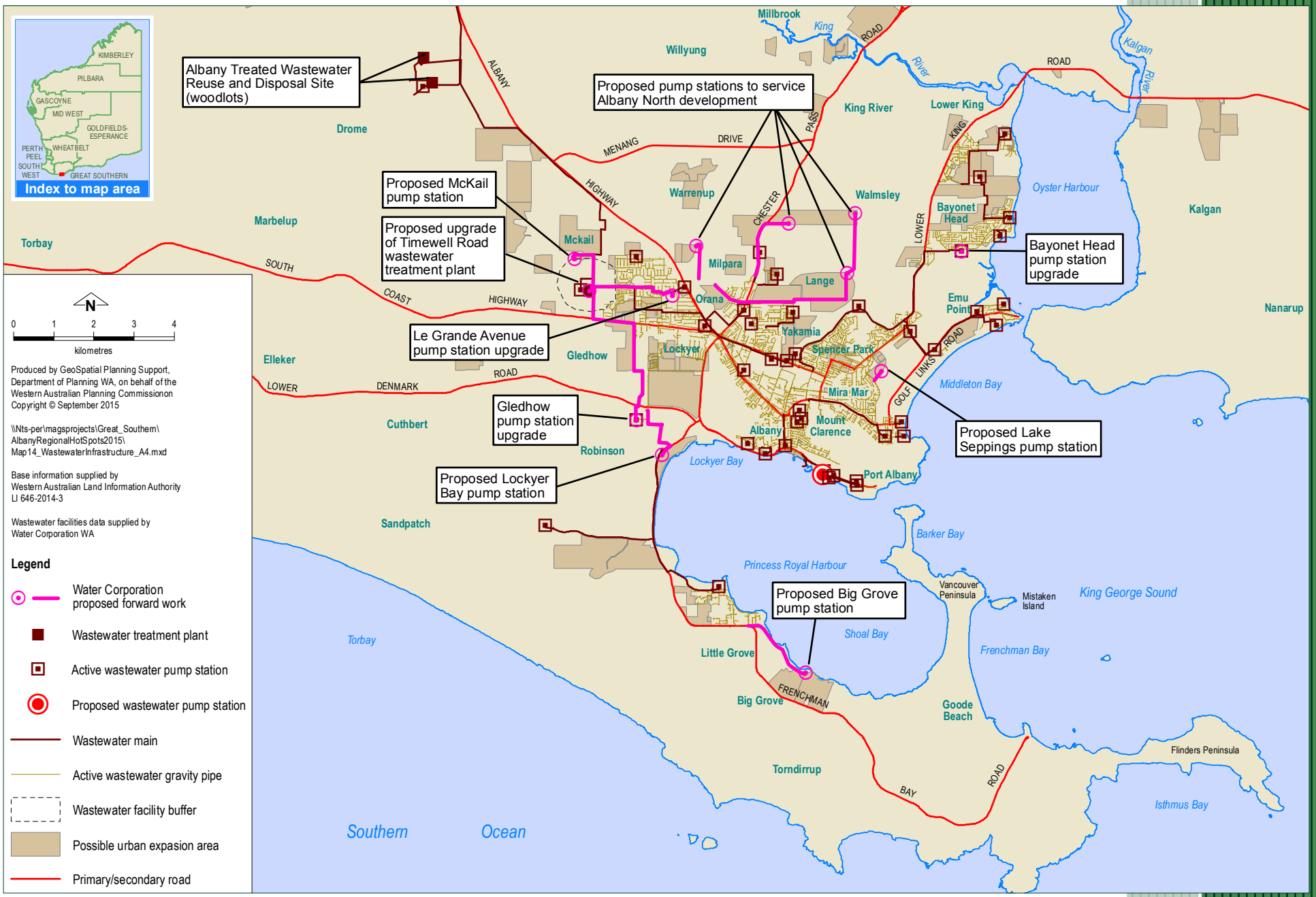
Figure 39 indicates some of the planned wastewater infrastructure that will be constructed in the future to support ongoing urban development in Albany. Locations of the proposed pump stations and pressure mains, shown on Map 14, are conceptual, and the timing of the projects will be driven by the progression of development.

Figure 39: Albany wastewater capital investment



Source: Water Corporation (2015) URL http://www.watercorporation.com.au/water-supply-and-services/solutions-to-regional-water-supply/regional-water-and-wastewater-schemes/albany-wastewater-scheme-summary

Map 14: Wastewater infrastructure



10.3 Energy

The Albany area forms part of the South West Interconnected System (SWIS), which covers the south-west corner of Western Australia, from Albany in the south, to Kalbarri in the north and Kalgoorlie in the east.

Power generation to the south and south west of the network is predominately from Muja, Collie, Blue Waters, Worsley, Wagerup and Kemerton Power Stations. Power is also generated at a number of smaller operations around the network including the Albany Wind Farm, where there are 18 turbines capable of generating 35.4 MW, which is enough to power approximately 80 per cent of Albany homes at high wind generation conditions. When there is insufficient wind to drive the turbines, the town's electricity is drawn entirely from elsewhere in the grid.

Transfer capacity will be increased to the Albany area after completing the Kojonup to Albany pole reinforcement project in 2015/16. As per the latest load forecast, the rate of load growth in the Albany area shows significant reduction in growth for future years. Therefore the existing network capacity in the Albany area is sufficient to cater for natural load growth, and it is expected that no further reinforcement will be required for the next few years.

Western Power will, however, continue to review load forecast on an ongoing basis and implement appropriate network reinforcements as required. Although existing infrastructure is sufficient to meet anticipated demand in the Albany area for some time, the development of new power intensive industries (such as the proposed Southdown magnetite mine) has the potential to increase load requirements within a relatively short timeframe.

Western Power, in conjunction with the project proponent, Grange Resources, determined that the most suitable means of supplying power to the proposed Southdown magnetite mine would be through the construction of a 330 kV transmission line from Muja to a proposed substation at Wellstead. In addition to powering the mine, the line could also be used to shore-up power supplies to other parts of the Great Southern region including Albany. However, as the Grange Resources project has been delayed indefinitely, the proposed 330 kV transmission project will not be required in order to meet anticipated demand.

10.4 Transport

Road

Main Roads Western Australia is responsible for the main routes to and from Albany including Albany Highway, Chester Pass Road, South Coast Highway and Great Southern Highway. They are also responsible for several distributor roads within the urban area including Princess Royal Drive, which provides an access road to Albany Port.

To provide improved freight efficiency to the Port of Albany, and also enhance social amenity on Chester Pass Road and Albany Highway, as well as alleviate congestion in the town centre, Main Roads WA are progressing the Albany Ring Road project. Stage 1 (Menang Drive) was completed in 2007 at a cost of $15.9 million. Stages two and three will complete the project; however, no funding is currently provided for construction in the four-year forward estimates. It is anticipated that stages two and three will be delivered concurrently – completing the link to the port. Main Roads WA are currently in the process of reviewing the planning/design of stages two and three of the project, which may affect the final alignment.

Other key road projects being considered include:

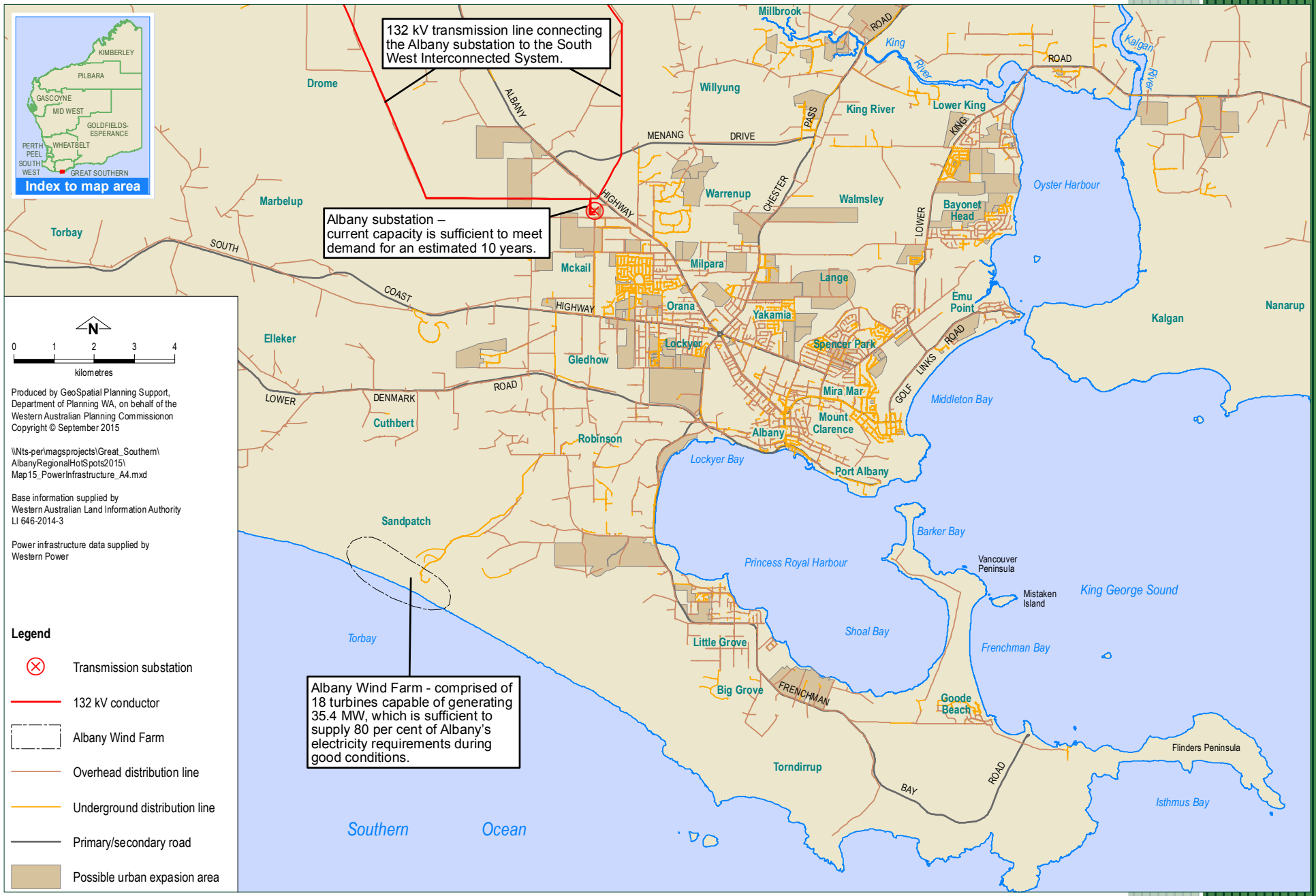
- Upgrading the Albany Roundabout;
- Duplication of South Coast Highway between the proposed Albany Ring Road and Albany Roundabout; and
- Duplication of the Albany Highway between the proposed Albany Ring Road and Albany Roundabout.

More information on works in the Albany area is available at the Main Roads WA website.

www.mainroads.wa.gov.au/AboutMainRoads/OurRoleRegions/GreatSouthern/Pages/works-traffic-conditions.aspx

Local roads are managed by the City of Albany, who have invested four to five million dollars per annum in recent years on renewal, upgrade and expansion of the road network across the local government area.

Map 15: Energy infrastructure



Rail

A railway line runs from Albany to Perth, with a spur line, just north of the townsite connecting the Down Road timber processing precinct to the network and Albany Port. There is no passenger service on the line, which is predominantly used for the transport of grain and timber products to Albany Port. There are no confirmed major upgrades to rail infrastructure in the Albany area; however, proposed improvements include:

- A possible extension of the spur line to the Mirambeena industrial estate, linking the site to the port; and
- Constructing a continuation of the existing woodchip rail siding at Albany Port to form a loop which will re-join the existing rail line to increase capacity and maintain a high level of receival.

Port

For many years, as the only deep water port in Western Australia, the Port of Albany was the point of arrival for many of Western Australia's early immigrants. The port remains a key piece of infrastructure for the Great Southern and surrounding regions.

Most of the freight through Albany Port is locally produced grain (wheat, barley, canola, oats). The other main export products in 2014/15 were wood chips and silica sands. Imports by volume were a fraction of the size of exports, with the main products being petroleum and fertiliser. In 2015/16 there are plans to recommence shipping of biomass pellets and logs, which have not been exported from Albany for the past several years.

Extensive planning has been undertaken to facilitate the export of iron ore through Albany Port should the proposed Southdown Joint Venture (Grange Project) proceed, however, given the slump in iron ore prices, the mine and associated port works have been delayed indefinitely.

If iron ore is to be exported, several upgrades will be required, including:

- Dredging the harbour to allow for Cape size vessels;
- Construction of No.7 Berth (and associated infrastructure) which will involve the reclamation of seven hectares of land at Princess Harbour for storage; and
- The construction of sheds and other port infrastructure.

Despite several potential mining projects not proceeding, record years for trade have been achieved in 2013/14 and 2014/15 due to high yielding grain harvests.

Airport

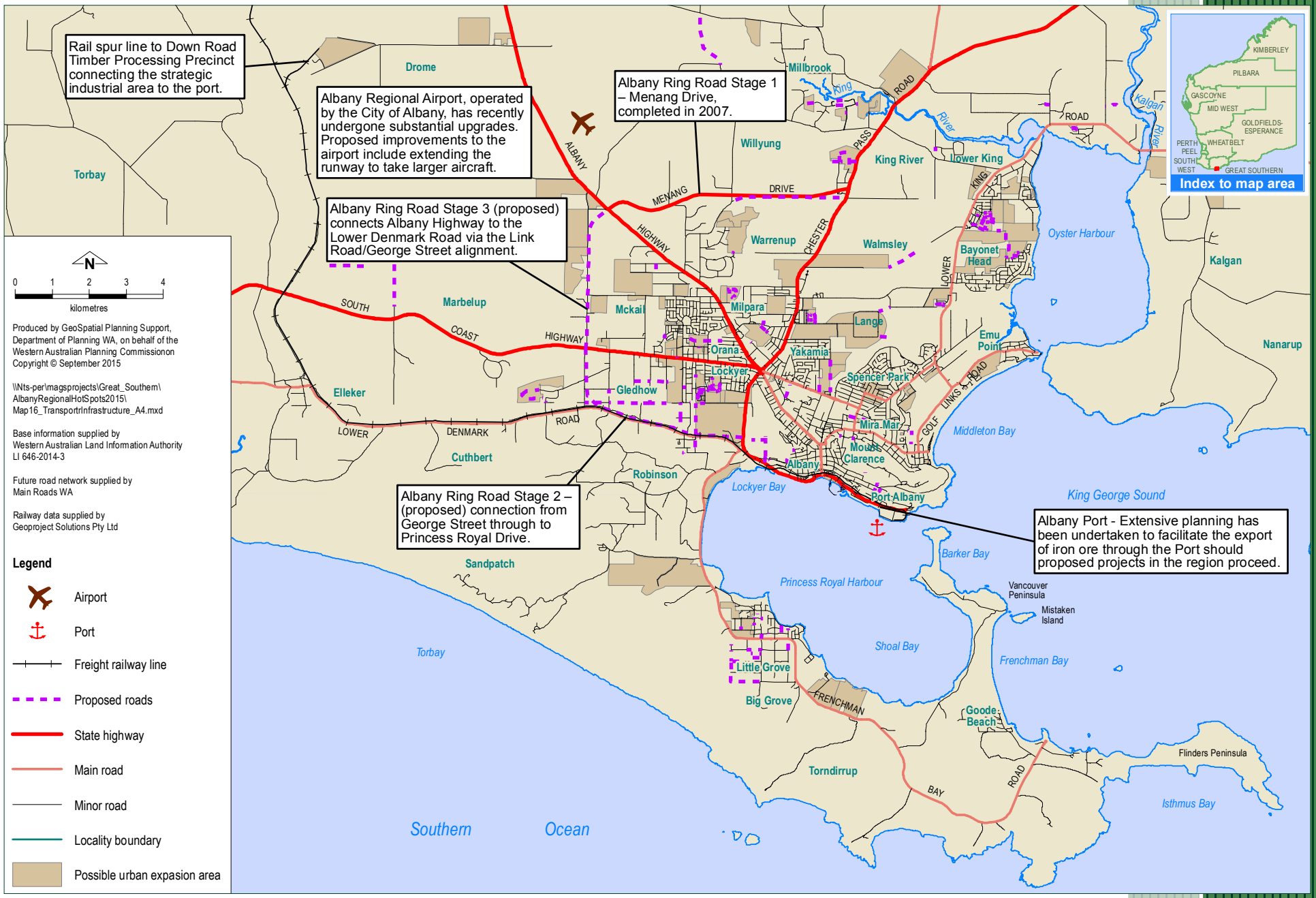
Albany Regional Airport is located just north of the city, to the east of Albany Highway and managed by the City of Albany local government authority. Substantial works have recently been undertaken at the facility including upgrades to security screening equipment, the check-in and baggage carousel, and the airport lounge.

Although road is by far the most common means of travel to and from Albany, passenger numbers through Albany Regional Airport have increased substantially in recent years. BITRE (Bureau of Infrastructure, Transport and Regional Economics) data show that in 2013/14, 59,784 passengers flew in/out of Albany, compared to 37,462, a decade earlier. Century West has produced an Airport Master Plan for the City of Albany to help guide future development.

The airport is currently serviced by 14 flights per week to/from Perth, operated by Virgin Airlines. Rio Tinto has provided flights for fly-in-fly-out workers in the Pilbara since 2012. Albany Airport is the only regional airport in Western Australia equipped with certified instrument landing facilities.

Proposals to upgrade facilities include extending the runway to cater for Code 4C (A320/B737) aircraft.

Map 16: Transport infrastructure



Glossary

Building approvals

A **house** is a detached building primarily used for long-term residential purposes. It consists of one dwelling unit. For instance, detached 'granny flats' and detached dwelling units (for example, caretaker's residences) associated with a non-residential building are defined as houses. Also includes 'cottages', 'bungalows' and rectories.

Other dwellings include all dwellings other than houses. They can be created by: the creation of new other residential buildings (for example, flats); additions/alteration work to an existing residential building; either new or alteration/addition work on a non-residential building; conversion of a non-residential building to a residential one, creating more than one dwelling unit.

Population

Estimated resident population (ERP) - Available for local government areas and SA2 geographies, this figure represents the number of people counted in an area on 30 June. It is calculated by:

- adding the people who were temporarily absent from the area on census night;
- subtracting the overseas visitors counted in the area on census night;
- augmenting the figure for estimated net undercount in the census;
- adjusting for difference between census night and 30 June; and
- updating each year using administrative data from a variety of sources.

ERPs are the official population figures for Australia. They are widely used as a basis for Government decision-making, including the allocation of seats in federal parliament and distribution of Commonwealth grants.

Geography

The Great Southern Region is one of the nine regions of Western Australia, as defined by the Regional Development Commissions Act 1993. The Region is comprised of 11 local government areas including: Albany, Broomehill-Tambellup, Cranbrook, Denmark, Gnowangerup, Jerramungup, Katanning, Kent, Kojonup, Plantagenet and Woodanilling.

Significant Urban Areas (SUAs) represent concentrations of urban development with populations of 10,000 people or more using whole Statistical Areas Level 2 (SA2s). They do not necessarily represent a single Urban Centre, as they can represent a cluster of related Urban Centres with a core urban population over 10,000. They can also include related peri-urban and satellite development and the area into which the urban development is likely to expand.

Statistical Areas Level 1 (SA1s) have been designed as the smallest unit for the release of Census data. SA1s generally have a population of 200 to 800 persons, and an average population of about 400 persons. They are built from whole Mesh Blocks and there are approximately 55,000 SA1s covering the whole of Australia.

Statistical Areas Level 2 (SA2s) are a general-purpose medium sized area built from whole SA1s. Their aim is to represent a community that interacts together socially and economically. SA2s generally have a population range of 3,000 to 25,000 persons and have an average population of about 10,000 persons. The SA2 is the lowest level of the ASGS structure for which Estimated Resident Population (ERP), Health and Vitals and other non-Census ABS data are generally available. There are 2,196 SA2s covering the whole of Australia.

Statistical Areas Level 3 (SA3s) provide a standardised regional breakup of Australia. The aim of SA3s is to create a standard framework for the analysis of ABS data at the regional level through clustering groups of SA2s that have similar regional characteristics. SA3s are built from whole SA2s and in general have populations between 30,000 and 130,000 persons. They are often the functional areas of regional cities and large urban transport and service hubs.

Subdivision approvals

Conditional approval is granted by the Western Australian Planning Commission (WAPC) for subdivision to begin subject to certain conditions being met. The approval is preceded by an assessment of the proposed subdivision plan by statutory referral agencies, including servicing authorities. On receipt of conditional approval, the proponent may commence subdivision development in accordance with the conditions of approval. A conditional approval remains valid for three years where five lots or less are approved and for four years where six lots or more are approved.

Current valid conditional approvals refer to those conditional approvals that are still valid but have not yet been issued with final approval. In general, these are approvals for which construction/servicing has not yet commenced or is currently under way (see **active conditional approvals**).

Active conditional approvals refer to conditionally approved lots where a servicing agreement (agreement to construct) has been signed between the Water Corporation and the developer. These are termed lots on non-cleared agreements.

Inactive conditional approvals are where conditional approval has been granted and the approval is still valid, but where a servicing agreement (agreement to construct) has not been signed between the Water Corporation and the developer.

Lapsed conditional approvals are those where the approval has expired and the conditions have not been met.

Final approval is the WAPC endorsement of the proponent's submitted plan/diagram(s) of survey describing the now complete subdivision; constructed in accordance with the conditions set down in the conditional approval. Final approvals are then registered with the Office of Titles where certificates of titles for the newly created lots can be issued.

Developers lodged application - subdivision application and its accompanying lots received by the WAPC for subdivision approval.

Application under assessment - is the number of applications and accompanying lots awaiting decision for subdivision. Statistics include deferred applications.

Planning

Local planning schemes are detailed planning schemes developed by local governments to identify the range of permitted land uses within specified locations. Within the Metropolitan Region Scheme and Peel Region Scheme areas, local planning schemes must be consistent with the provisions identified within the relevant region scheme where applicable.

Local planning strategies contain the strategic plan and policy context of a local planning scheme. The strategy sets out the general aims, intentions and desired outcomes for long-term growth and change, having regard to social, economic and environmental factors. An assessment of the capacity of infrastructure such as water, sewerage, electricity and roads is also usually considered in a local planning strategy. Residential densities and commercial centres may also be identified.

A **scheme amendment** is the process of changing zones or reservations from one use to another. The amendment process requires proposed amendments to be advertised for wider community and government comment. The amendment process is regulated by the ***Planning and Development Act 2005***, allowing for extensive community consultation to review the proposal before a final decision is made.

Structure plan refers to a document including spatial plans that details the proposed layout of a future development area. The preparation of a structure plan is one of the first steps in progressing proposals for the development of new areas. In addition to illustrating details such as road configuration and the location of retail and community facilities such as shops, schools and public open space, a structure plan can also show details such as housing density, land use classifications and buffer zones. Structure plans highlight opportunities and constraints in an area, and can provide the basis for amendments to local planning schemes. Structure plans can generally be categorised as region, district or local structure plans.

Temporal land supply is an estimate of the number of years it will take to completely consume land that is currently zoned for urban development. Temporal land supply can vary based on different development scenarios, particularly where different rates of density and infill are applied.

Underlying housing demand refers to the need for additional dwellings that will satisfy the requirements of a population (and population growth), irrespective of the demand actually expressed by the market.

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Appendix 1

Integrated Land Information Database (ILID)

ILID 2015 – Background:

The ILID is a net land-use assessment and capability model that is generated at a cadastral level for the whole of Western Australia. The database can be used to identify the current range of land uses within a number of predefined boundaries. It can also model future capability based on what is known about the current (or proposed) planning policies and statutory instruments.

The model is produced within a Geographic Information System by overlaying a variety of layers to compute the coincidence of two or more parameters. For example, if a dataset containing the locations of school sites is overlayed with another dataset that shows the areas that are within two kilometres of the coast, it is possible to generate a single dataset with schools that are within two kilometres of the coast. This process can be repeated with a variety of datasets in endless combinations to help with multi-criteria decision analysis through the process of elimination.

The ILID works by linking the spatial extent of many different input layers with all the unique cadastral identifiers that exists at a particular point in time. The result of this overlay process creates many versions of the cadastre attributed with discrete pieces of information i.e. cadastre version of the local planning scheme zones, region schemes, R-Codes and so on. The 'integrated' component of the database means that once all of the individual inputs have been identified, they can all be joined together using a tabular join through the common PIN number field across all datasets.

For this document the ILID has been used to identify the lot potential and additional dwelling potential of all residential lots (with an R-code identified in the City of Albany Local Planning Scheme 1) in the Albany urban area. Vacant lots were not included in this analysis.

ILID analysis in this document includes three key inputs: lot size, R-code value and dwelling count/location. Constraints to subdivision such as heritage, infrastructure supply and environment are not variables included in this analysis, and as such, a significant proportion of the development potential may not be realised.

Definitions:

Lot potential is used to determine how many potential lots the R-Code intends to yield as a maximum. For example a lot that has an R-Code of R20 has a planned density of a single 450m^2 lot. Or a 900m^2 lot has the potential to create two 450m^2 lots. In any case the lot potential can only be calculated if there is an existing R-Code present.

Net dwellings, also known as **additional dwelling potential**, identifies the extra amount of dwellings a single lot can add on (disregarding the location of the current dwelling footprint and has a hundred percent take-up rate). This is determined by the size of the lot and the current lot potential based on the R-Code planning and any existing dwellings.

Appendix 2

Integrated Regional Information System (IRIS)

The sections of this report discussing the development status of land zoned for residential, rural living, industrial and commercial purposes draw heavily on the tiered land supply assessment model, the central output of the Integrated Regional Information System (IRIS). The model is a geographic information system (GIS)-based tool used to assess key measures of land use dynamics across Western Australia.

The IRIS model groups zones under all local planning schemes into primary, secondary and tertiary categories. This grouping of local planning scheme zones forms the zone 'catchment' for each category.

Tier one of the IRIS model groups local planning scheme zones into primary categories for analysis. The table below shows the groupings of City of Albany Local Planning Scheme land use zones for each primary land use discussed using IRIS analysis in this document.

Primary category (IRIS analysis)	City of Albany Local Planning scheme category
Residential	Residential
	Future urban
Commercial	Highway commercial
	Local centre
	Neighbourhood centre
	Regional centre
	Regional centre mixed business
	Regional centre mixed use
Industrial	General industry
	Light industry
	Port industry
Rural living	Conservation
	Rural residential
	Rural village
	Rural small lot holdings
	Special residential
	Special use – Zone 22

Tier two of the IRIS model addresses the development status of each lot within the specified primary land use category. Each cadastre (lot) within each primary land use category is attributed one of three values (developed, undeveloped or unrated), based on information from the Valuer General's Office of Western Australia.

Developed refers to lots that are zoned for development for the purposes of the specified primary land use category for which premises information is captured in Landgate's property valuation database.

Undeveloped refers to lots that are zoned for development for the purpose of special residential and rural living that are recorded as vacant in Landgate's property valuation database.

Unrated refers to lots that are zoned for development for the purpose of the specified primary land use category for which no vacant land or premises valuation information has been captured in Landgate's property valuation database. This may include State or local government owned lots or premises exempt from rates, Crown allotments, common property within lots on survey, newly created lots on survey, land otherwise exempt from rates and some public roads which are zoned for the primary land use under the local planning scheme.

Tier three of the IRIS model refers to the nature of development by assessing the premises type against the land use as indicated by the local planning scheme. Tier three of the IRIS model has not been included in analysis for this report as sites with identified development potential are described detailed in Table 6 and Maps 8-10 of this document.