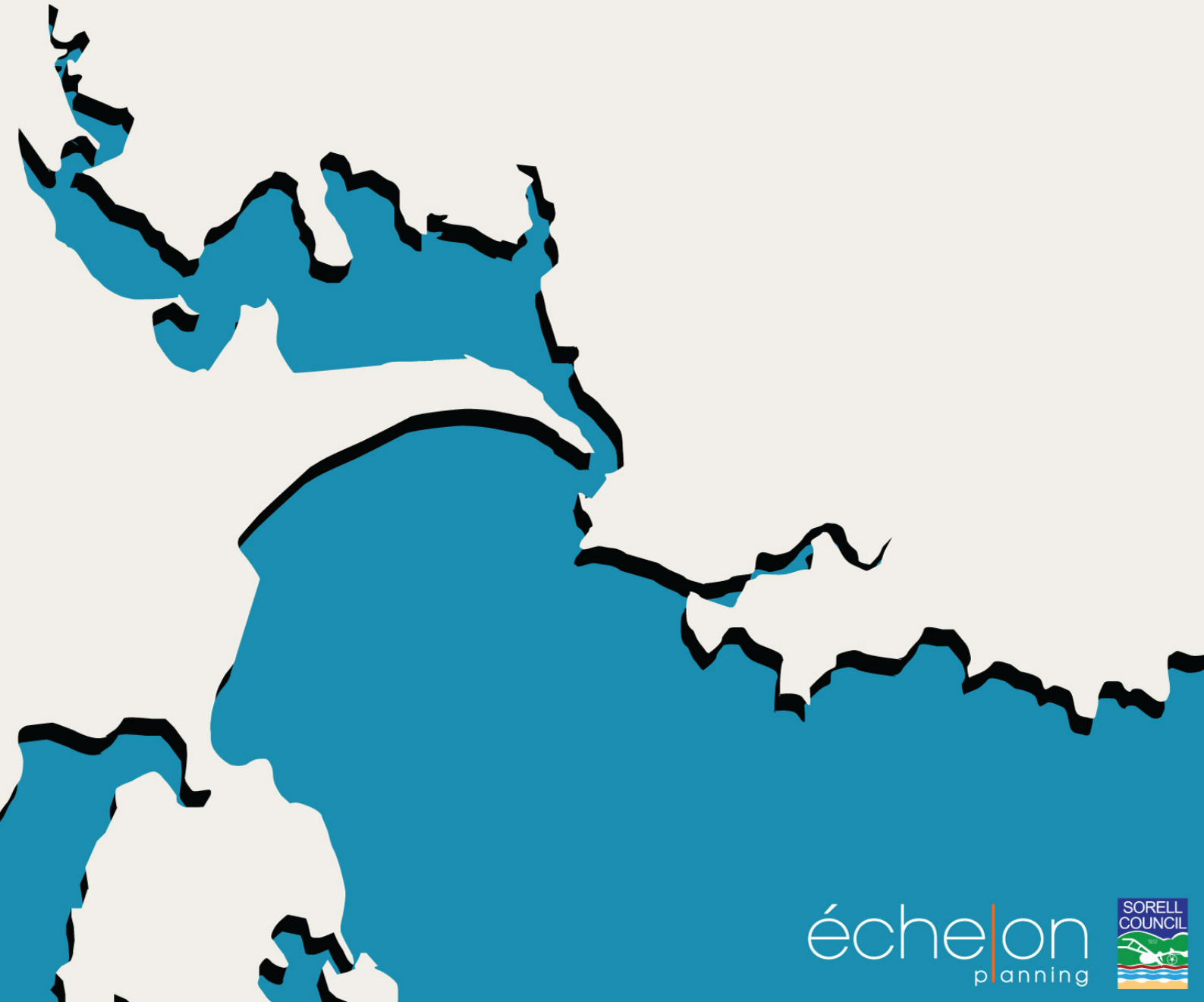
Sorell

Land Supply Strategy

Stage 1 - Land Supply and Demand Analysis Report

2019 Update



échelon planning

SORELL COUNCIL

Date	21 June 2019
Project number	2257
Prepared by	Sarah Ancell and Liam Stanley
Reviewed by	JM, JR, RF, RH
Version	Final

Contents

1 INTRODUCTION

1.1 Scope of the Strategy

Echelon Planning was engaged by Sorell Council to prepare the 2017 Land Supply Strategy for their municipality. This report provides a 2019 update to reflect the changes that have occurred in the last two years.

The Land Supply Strategy addresses the following:

- Stage 1: Land supply and demand analysis for residential, industrial and commercial land.
- Stage 2: Assessment of expansion options for residential, industrial and commercial land.
- Stage 3: Preparation of masterplans for expansion options for residential, industrial and commercial land.

This report documents the results of Stage 1. It adopts a 20 year timeframe (to 2038) and considers the entire municipality. Expansion options will be identified in Stage 2 for the Sorell township and the Southern Beaches.

The outcomes of the Strategy will be used by Council in its development of local planning provisions ("LPP") for inclusion in the Tasmanian Planning Scheme. The strategy will confirm the quantum of land that should be set aside, the assessment of expansion options will confirm the most suitable sites for additional growth, and the masterplans will conceptually demonstrate that the selected sites can be developed in a way that will integrate with the surrounding land uses.

This Stage 1 Report has been prepared based on a detailed analysis of property data provided by Council, population projections from the Department of Treasury and Finance, and GIS data. Background documents such as the Southern Tasmania Regional Land Use Strategy, the SERDA Economic Infrastructure Development Study, the Southern Tasmania Industrial Land Study 2011 and the Southern Tasmania Industrial Land Strategy 2013 have also been considered in the preparation of this report.

Figure 1: Land for sale in Sorell

1.2 Setting the Scene

Population Growth

The municipality of Sorell is experiencing one of the highest growth rates in Tasmania. The Department of Treasury and Finance estimates that the fastest growing municipalities are Flinders (which experienced 3.1% population growth from June 2017 to June 2018), Sorell (3.0% annual growth) and Brighton, Kingborough and Clarence (all of which experienced 2.0% growth)[1]. ABS data for Sorell also shows an average annual growth of between 1.6% and 3.0% from 2013 to 2018[2]. The Department's population projections estimate an average annual growth rate of 1.29% over the next 20 years as 3,919 more people move to Sorell (refer to Figure 2 and Table 1). It is important that enough land is available to house these additional residents, provide them with local employment opportunities, and ensure activity centres can function effectively.

The rate of growth anticipated to be highest in the immediate term and will gradually slow from 1.58% in 2019 to 0.75% in 2038. This means that the demand for additional dwellings will be strongest in the next few years and will gradually taper off over time. It should also be noted that the projected rate of growth in Sorell is significantly higher than the average projected growth for Tasmania. As shown in Figure 3, the annual state-wide growth is projected to gradually lower from 0.52% in 2019 to 0.16% in 2038.

The draft Sorell Council Strategic Plan 2019 to 2029 includes an objective to facilitate regional growth, which will be delivered through actions such as the provision of the infrastructure and job opportunities required to support an expanding population, and a contemporary planning model that supports diversified growth.

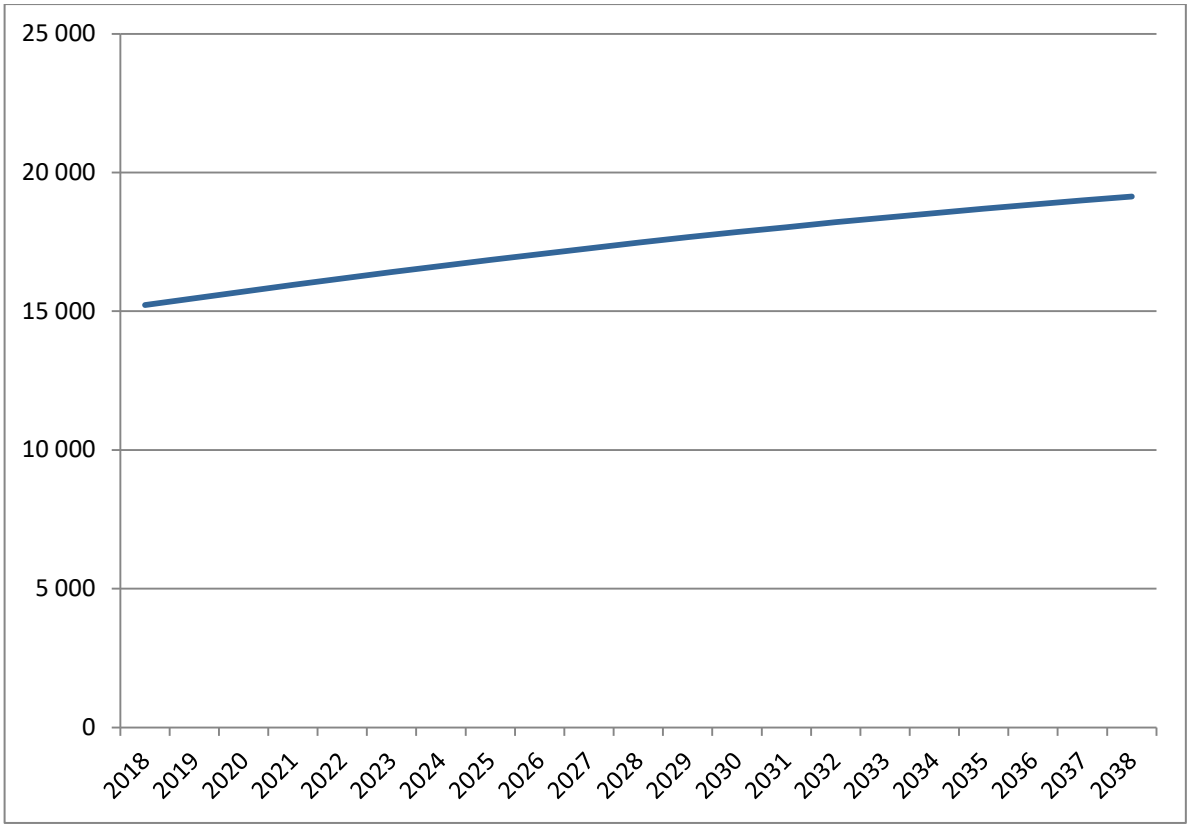


Figure 2: Population projections for municipality of Sorell, 2018 to 2038 (Department of Treasury and Finance, 2019)

[1] 'Regional Population Growth (ABS Cat No 3218.0)', Department of Treasury and Finance, 27 March 2019

[2] 'Regional Statistics by LGA 2018, 2011-2018', Australian Bureau of Statistics, viewed 5 June 2019

Table 1: Population projections for municipality of Sorell, 2018 to 2038 (Department of Treasury and Finance, 2019)

Year	Population	Increase	Increase (%)
2018	15,221		
2019	15,467	246	1.59%
2020	15,709	242	1.54%
2021	15,947	238	1.49%
2022	16,181	234	1.44%
2023	16,409	228	1.39%
2024	16,632	223	1.34%
2025	16,851	218	1.29%
2026	17,063	213	1.25%
2027	17,270	207	1.20%
2028	17,472	201	1.15%
2029	17,666	194	1.10%
2030	17,853	187	1.05%
2031	18,033	180	1.00%
2032	18,207	174	0.96%
2033	18,375	169	0.92%
2034	18,539	163	0.88%
2035	18,697	158	0.84%
2036	18,849	153	0.81%
2037	18,997	148	0.78%
2038	19,140	143	0.75%
	Total	**3,919**	**25.75%**
	Annual Average	**196**	**1.29%**

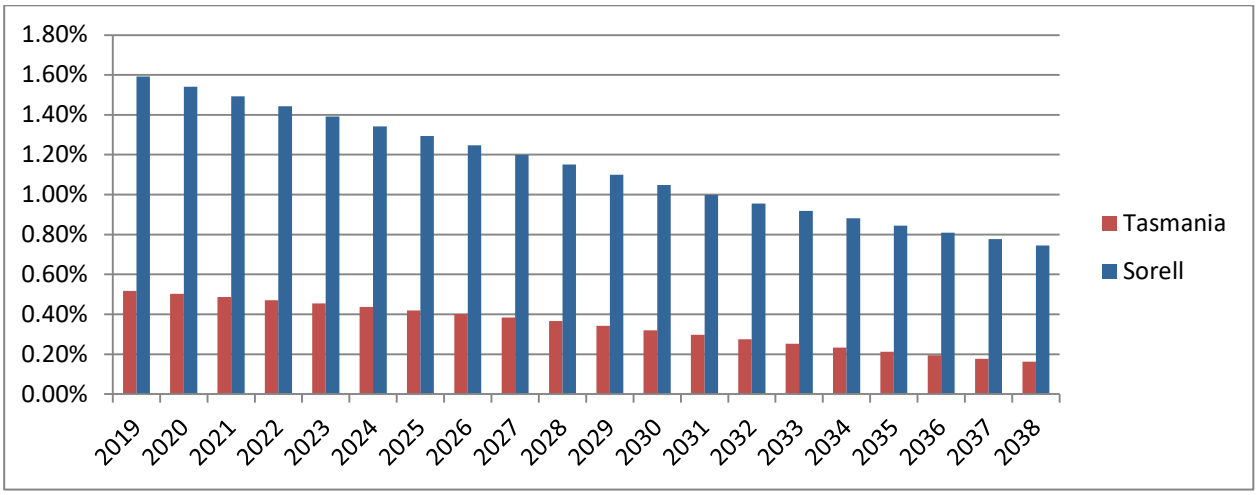


Figure 3: Population growth projections for Tasmania and municipality of Sorell, 2019 to 2038 (Department of Treasury and Finance, 2019)

Residential Growth

The Southern Tasmania Regional Land Use Strategy (STRLUS)[3] includes a strategy for residential growth for the twelve southern Tasmanian Councils including Sorell. The Strategy identifies an overall strategy for the municipality to encourage the majority of residential growth to be located in the settlement of Sorell and to a lesser extent in Midway Point, and to carefully manage infill growth in the other settlements.

The Settlement Framework within the STRLUS classifies the urban areas of Sorell as follows:

- Sorell = Major Satellite of Greater Hobart with some Greenfield Development.
- Midway Point = Minor Satellite of Greater Hobart.
- Dodges Ferry = Dormitory Suburb, Low Growth Strategy, Consolidation Growth Scenario.
- Lewisham and Primrose Sands = Dormitory Suburb, Very Low Growth Strategy, Consolidation Growth Scenario.
- Dunalley, Copping, Wattle Hill, Forcett, Nugent, Carlton, Orielton, Kellevie = Other Small Settlements, Very Low Growth Strategy, Consolidation Growth Scenario.

The STRLUS also includes guidance regarding Low Density Residential and Rural Living land. The Low Density Residential Zone is only to be used where it is necessary to manage land constraints or to acknowledge existing areas. Generally the Rural Living Zone is only to be used to provide for the infill or consolidation of existing rural living communities. Key requirements for these areas include predominantly sharing a boundary with an existing similarly zoned settlement.

Industrial Growth

The STRLUS includes a number of relevant regional policies for industrial land as follows:

- *IA 1 Identify, protect and manage the supply of well-sited industrial land that will meet regional need across the 5, 15 and 30 year horizons.*
- *IA 1.1 Ensure industrial land is relatively flat and enables easy access to major transport routes, other physical infrastructure such as water, wastewater, electricity and telecommunications*
- *IA 1.2 Locate new industrial areas away from sensitive land uses such as residentially zoned land.*
- *IA 1.3 Through the Southern Tasmania Industrial Land Study identify land sufficient to provide a 30-year supply of industrial land and protect from use and development, which would preclude its future conversion to industrial land use.*
- *IA 1.4 Through the Southern Tasmania Industrial Land Study identify land sufficient to provide a 15-year supply of industrial land and ensure its zoning for industrial purposes within the new planning schemes.*
- *IA 1.5 Aim to ensure a minimum 5-year supply of subdivided and fully serviced industrial land.*

Commercial Growth

The STRLUS includes an Activity Centres network which describes Sorell as a Rural Services Centre with the role being "To provide predominantly non-urban communities with a range of goods and services to meet their daily and weekly needs. Trips to larger Primary and Principal Activity Centres only required occasionally". Local Centres are defined as "Offer[ing] at least one grocery/convenience store and a range of small specialty shops (i.e. newsagents, pharmacy, gift store) or small-scale eating establishments".

[3] 'Southern Regional Land Use Strategy 2010-2035' amended May 2018, Southern Tasmanian Councils Authority

2 METHODOLOGY

2.1 Approach

The following details the methodology undertaken to assess the supply of and demand for residential, industrial and commercial land in Sorell.

2.2 Supply

The following three phases of analysis were applied to the supply of residential, industrial and commercial land:

- Phase 1 – Classification of Land Parcels
- Phase 2 – Constraints Analysis
- Phase 3 – Estimation of Development Potential for Residential Land

Phase 1 – Classification of Land Parcels

Data on land parcels was obtained from Council's property database. Every parcel of land within the following zones was included:

- Residential:
  - General Residential Zone
  - Village Zone (residential properties only from this mixed use zone)
  - Low Density Residential Zone
  - Rural Living Zone
  - Environmental Living Zone
  - Particular Purpose Zone (Urban Growth)
- Industrial:
  - Light Industrial Zone
- Commercial:
  - General Business Zone
  - Local Business Zone
  - Village Zone (commercial properties only from this mixed use zone)

The data was classified into the following general categories:

- Vacant Land – Vacant sites that meet the minimum subdivision size for the zone.
- Vacant Undersized Land – Vacant sites that do not meet the minimum subdivision size for the zone.
- Underutilised Land – Non-vacant land that is generally greater than two times the size of the minimum subdivision size (minus the land around the existing dwelling). The location of existing dwellings on these lots means that it would rarely be possible to retain the existing dwelling and create a new lot where each is the minimum subdivision size, hence the need to only count the larger underutilised sites.
- Non-Vacant Land
- Other Land

A detailed description of how each land within each zone was classified into these categories is included in the following tables. The 'classification' column refers to how the property is described in Council's database. Only classifications where there is one or more property are shown (e.g. there are no "Vacant Residential" sites in the Environmental Living Zone, only "Vacant Undersized Residential" sites).

Table 2: General Residential Zone

Categories	Classification
Vacant Residential	Vacant Residential 450 sqm or greater
	Primary Production where improvements do not refer to a house
Vacant Undersized Residential	Vacant Residential less than 450 sqm
Underutilised Residential	Non-Vacant Residential 1,000 sqm or greater
	Primary Production where improvements refer to a house
Non-Vacant Residential	Non-Vacant Residential less than 1,000 sqm
	Non-Vacant Commercial where improvements include reference to a house
	Non-Vacant Industrial where improvements are listed as "workshop & flat"
	Non-Vacant Community Services where improvements are listed as "lodge"
Other	Non-Vacant Other
	Non-Vacant Community Services

Table 3: Village Zone

Categories	Classification
Vacant Residential	Vacant Residential 600 sqm or greater
Vacant Undersized Residential	Vacant Residential less than 600 sqm
Underutilised Residential	Non-Vacant Residential greater than 2,000 sqm
	Potentially underutilised sites were checked on aerial photos (Nearmap photo dated 20 January 2019)
Non-Vacant Residential	Non-Vacant Residential less than 2,000 sqm
Non-Vacant Commercial	Non-Vacant Commercial
	Primary Production
Other	Non-Vacant Other

Table 4: Particular Purpose (Urban Growth) Zone

Categories	Classification
Vacant Residential	Vacant Residential
Underutilised Residential	Non-Vacant Residential 1,000 sqm or greater
Non-Vacant Residential	Non-Vacant Residential less than 1,000 sqm

Table 5: Low Density Residential Zone

Categories	Classification
Vacant Residential	Vacant Residential 3,000 sqm or greater in Connellys Marsh
	Vacant Residential 800 sqm or greater in Dunalley Area 1
	Vacant Residential 1,500 sqm or greater in Dunalley Area 2
	Vacant Residential 2,000 sqm or greater in all other suburbs
Vacant Undersized Residential	Vacant Residential less than 3,000 sqm in Connellys Marsh
	Vacant Residential less than 800 sqm in Dunalley Area 1
	Vacant Residential less than 1,500 sqm in Dunalley Area 2
	Vacant Residential less than 2,000 sqm in all other suburbs
Underutilised Residential	Non-Vacant Residential 8,000 sqm or greater in Connellys Marsh
	Non-Vacant Residential 2,000 sqm or greater in Dunalley Area 1
	Non-Vacant Residential 4,000 sqm or greater in Dunalley Area 2
	Non-Vacant Residential 5,000 sqm or greater in all other suburbs
Non-Vacant Residential	Non-Vacant Residential less than 8,000 sqm in Connellys Marsh

Categories	Classification
	Non-Vacant Residential less than 2,000 sqm in Dunalley Area 1
	Non-Vacant Residential less than 4,000 sqm in Dunalley Area 2
	Non-Vacant Residential less than 5,000 sqm in all other suburbs
Other	Blanks
	Non-Vacant Other
	Non-Vacant Commercial
	Non-Vacant Community Services

Table 6: Rural Living Zone

Categories	Classification
Vacant Residential	Vacant Residential 1ha or greater
	Vacant Residential where improvements do not include a dwelling
Vacant Residential Undersized	Vacant Residential less than 1ha in area
	Vacant Primary Production less than 1ha in area
Underutilised Residential	Non-Vacant Residential sites 3ha or greater in area
Non-Vacant Residential	Non-Vacant Residential less than 3ha in size
	Non-Vacant Industrial where improvements include a house
Non-Vacant Industrial	Non-Vacant Industrial where improvements do not include a house
Other	Non-Vacant Other
	Non-Vacant Community Services
	Primary Production

Table 7: Environment Living Zone

Categories	Classification
Vacant Undersized Residential	Vacant Residential under 6ha
	Non-Vacant Residential where improvements are listed as "shed" and site is under 6ha
Non-Vacant Residential	Non-Vacant Residential less than 12ha in area
	Non-Vacant Commercial where improvements are listed as "house and accom"
Other	Non-Vacant Commercial where improvements are listed as “exchange”

Table 8: Light Industrial Zone

Categories	Classification
Vacant Industrial	Vacant Industrial 1,000 sqm or greater
Vacant Undersized Industrial	Vacant Industrial less than 1,000 sqm
	Vacant Residential less than 1,000 sqm
Underutilised Industrial	Potentially underutilized sites were checked on aerial photos (Nearmap photo dated 20 January 2019)
Non-Vacant Land	Non-Vacant Industrial
	Non-Vacant Commercial
	Non-Vacant Residential

Table 9: General Business Zone

Categories	Classification
Vacant Commercial	Vacant Commercial 300sqm or greater
Underutilised Commercial	Potentially underutilised sites were identified from aerial photos (Nearmap photo dated 20 January 2019)

Non-Vacant Commercial	Non-Vacant Commercial
	Non-Vacant Industrial
	Non-Vacant Residential
	Non-Vacant Community Services

Table 10: Local Business Zone

Categories	Classification
Vacant Commercial	Vacant Commercial greater than 300 sqm
	Vacant Industrial greater than 300 sqm
Vacant Undersized Commercial	None noted as all vacant land greater than 300 sqm
Underutilised Commercial	Potentially underutilised sites were identified from aerial photos (Nearmap photo dated 20 January 2019)
Non-Vacant Commercial	Non-Vacant Residential
	Non-Vacant Commercial
	Non-Vacant Industrial

Phase 2 – Constraints Analysis

The land identified as Vacant, Vacant Undersized or Underutilised in Phase 1 was then overlaid with constraints data provided by Council. The constraints overlays were classified as follows:

- Significant constraints:
  - Constraints that are likely to make development of the land impractical or unfeasible.
  - None of land area counted.
- Likely constraints:
  - Constraints likely to reduce the development potential of the land but not to the extent that development of the site would be impractical or unfeasible.
  - 50% of land area counted to reflect that constraints exist that are likely to reduce the developable area. The extent to which each constraint will apply will vary on a site to site basis. For the purposes of this analysis, it has been assumed that 50% of the land may not be developable. The actual developable area would be determined from site-specific analysis and design.
- Constraints unlikely:
  - Constraints unlikely to impact on development potential.
  - Full area of land counted.

The constraints data analysed as part of this assessment was as follows:

- Significant constraints:
  - Biodiversity Protection Area – It is noted that permit applicants are able to prepare environmental assessments to identify if any land within this area is developable.
  - Coastal Erosion Hazard Area
  - Coastal Inundation Hazard Area
  - Landslide Hazard Area (Medium)
- Likely constraints:
  - Attenuation Areas – The updated mapping that has been prepared for the new planning scheme was utilised.
  - Landslide Hazard Area (Low)
  - Electricity Transmission Infrastructure Protection
  - Heritage Area
  - Waterway and Coastal Protection Area
  - 1:100 storm event and inundation data
  - Priority Vegetation Area

- Constraints unlikely:
    - Scenic Landscape Area – Land in this area is generally in the rural zones.
    - Potential Dispersive Soils – Engineering techniques can address the disturbance of these soils.

Several of these planning overlays overlap each other, so polygons were created that identified the following:

- Shape 1: Land subject to significant constraint(s), or both significant and likely constraints.
- Shape 2: Land subject only to likely constraint(s).

Phase 3 – Estimation of Development Potential

To calculate the potential number of lots that could be accommodated on the vacant and underutilised residential land, development densities were applied to each zone in recognition that not all land will be developable, and that developments will contain a variety of lots sizes, i.e. it is unlikely that all lots will be the minimum subdivision size. For example, roads, areas of public open space, and stormwater infrastructure may need to be accommodated within subdivisions.

To calculate the potential number of lots that could be accommodated on the vacant and underutilised residential land, it was necessary to identify non-developable and developable land, and to calculate the yield of the developable land. The Southern Tasmania Regional Land Use Strategy sets a minimum net residential density of 15 dwellings per hectare for conventional density residential development. This figure relates to the developable land, i.e. only the parts of the site that are being used for residential purposes. The STRLUS defines net density as:

> *The number of dwelling per hectare on land devoted solely to residential development. While it includes private driveways and private open space, it does not include public infrastructure such as roads, streets and public open space. (p. 103)*

It is necessary to utilise assumptions as the net developable area of specific sites cannot be determined until detailed site-specific information is available. It is also noted that lower density lots generally require a smaller proportion of land to be set aside for non- developable purposes (such as roads, drainage reserves, but not public open space, etc) compared to conventional density development.

The following assumptions were made for the General Residential and Village Zones:

- One third of land will be non-developable as it will be used for public infrastructure such as roads, streets, drainage infrastructure and public open space.
- The remaining two thirds will be developable and will be developed at a net residential density of 15 dwellings per hectare.

For lower density areas, the following ratios were applied in recognition of the different minimum lot sizes. Lower density lots generally require a smaller proportion of land to be set aside for non-developable purposes (such as roads, drainage reserves, but not public open space, etc) compared to conventional density development.

- Low Density Zone:
    - Average of 2,000 sqm minimum lot size
    - 4.5 dwellings per hectare (10% allowance for roads etc)
- Low Density Zone – Dunalley Area 1:
    - Average of 800 sqm minimum lot size
    - 11.25 dwellings per hectare (10% allowance for roads etc)
- Low Density Zone – Dunalley Area 2:
    - Average of 1,500 sqm minimum lot size
    - 6 dwellings per hectare (10% allowance for roads etc)
- Low Density Zone – Connolleys Marsh:
    - Average of 3,000 sqm minimum lot size
    - 3 dwellings per hectare (10% allowance for roads etc)

- Rural Living Zone:
    - 1ha minimum lot size
    - 0.9 dwellings per hectare (10% allowance for roads etc)
- Rural Living Zone – Area B:
    - 10ha minimum lot size
    - 0.095 dwellings per hectare (5% allowance for roads etc)
- Environmental Living Zone:
    - 6ha minimum lot size
    - 0.15 dwellings per hectare (5% allowance for roads etc)

As industrial and commercial developments can vary significantly in their land requirements, the overall vacant area of land was identified rather than a potential number of lots.

2.3 Demand

Building Applications

Building application data from 2009 to 2018 from Council's database was sorted and analysed as follows:

- The "Current Status" classification lists applications as "approved" or "completed". Only "completed" applications were selected.
- The "Description" classification lists categories of building activities. Only applications that included additional dwellings, commercial buildings, or industrial buildings were selected, i.e. extensions and alterations were not selected.
- Each selected application was categorised as "residential", "industrial" or "commercial" and the annual totals for each were identified.

Subdivisions

Data on subdivision applications from 2009 to 2018 from Council's database was sorted and analysed as follows:

- The "Description" classification lists categories of subdivision activities. Only applications that resulted in the creation of additional lots selected, i.e. boundary adjustments were not selected. Some applications were only described as "subdivision"; the planning permits for these were checked manually to determine the number of lots.
- The "Current Status" classification lists where an application is "approved", "completed", "lapsed" etc. Only "completed" applications were selected.
- The "Zone" classification lists what zone the subdivision was in, but was generally blank. The addresses for the selected applications were checked manually to determine what zone applied.
- Annual totals of lots within completed applications were identified for each zone, and were aggregated by residential, industrial and commercial categories.

Population Projections

The 2019 population projections from the Department of Treasury and Finance were utilised in this analysis (refer to Section 1.2 for data). These provide annual projected population increases by municipality. Data from 2018 to 2038 was selected. Data on the average household size and number of unoccupied dwellings for the Sorell Local Government Area was obtained from Australian Bureau of Statistics 2011[4] and 2016[5] data.

[4] Australian Bureau of Statistics, 2011, Quickstats for Sorell (M), viewed 20 May 2019
[5] Australian Bureau of Statistics, 2016, Quickstats for Sorell (M), viewed 20 May 2019

Previous Reports

The Southern Tasmania Industrial Land Study (July 2011) identifies four industry categories:

- Local service industries, which are population driven. With strong population growth forecast in Sorell, the forecast demand from 2011 to 2026 for industrial land in Sorell is estimated at 1.5 to 1.8ha per annum.
- Export-oriented industries, which are strongly influenced by the uptake of irrigation schemes, agricultural transition and the growth of export clusters. No land demand forecasts were attributed to this industry category. With the newly completed irrigation scheme in Sorell, this could be a driver for future growth.
- Transport, warehousing and wholesales, which are intermediate industries driven by population and export growth. No land demand forecasts were attributed to this industry category. With the newly completed irrigation scheme and the proposed expansion of Hobart Airport's freight capacity, there could be the potential for some of these activities to locate in Sorell, although given that these can require large sites and good road access, Sorell's current lack of large available sites and issues with road capacities would limit the feasibility of large-scale uses of this nature.
- Bulky goods retailing, which is driven by population growth and the sector specific characteristics. No land demand forecasts were attributed to this industry category. This role is fulfilled at Cambridge Park and is unlikely to expand to any locations in Sorell.

The Southern Tasmania Industrial Land Strategy (July 2013) recommends sites throughout the region to accommodate the first three of these industry categories. It does not assess any sites in Sorell for export-oriented and transport/warehouse/wholesale industries. However, it is understood that Sorell Council would like to ensure these industries can be accommodated within the municipality.

3 RESIDENTIAL LAND ANALYSIS

3.1 Residential Land Supply

The residential land supply consists of land located in the following zones:

- Conventional density sites, where the minimum subdivision size is (or in the case of the Particular Purpose Zone will be) 600 sqm or less: General Residential, Village, Particular Purpose (Urban Growth) Zones.
- Low density sites, where the minimum subdivision size is 800 sqm or greater: Low Density Residential, Rural Living, Environmental Living Zones.

The locations of these are illustrated in Figures 5 and 6.

Land classified as Vacant is the most readily available land for development. Vacant Undersized parcels can only be developed if they are consolidated with other land. Underutilised land already contains dwellings and will only be subdivided if the owner is interested in either redeveloping their land or developing the undeveloped portion of their landholding. It is highly unlikely that all of this land would be developed within the 20 year timeframe of this Strategy.

The following sections deal with greenfield and infill sites. Council have advised that the following sites are classified as greenfield sites:

- The Particular Purpose – Urban Growth zoned land in Sorell.
- Large undeveloped sites in the General Residential Zone in Sorell at Lot 1 and 37 Pawleena Road, 20 Arthur Highway, and Lot 30 Wolstenholme Drive.
- Large undeveloped sites in the General Residential Zone in Midway Point North at Lot 1, Lot 200, 195-227 and 252 Penna Road.

All other sites are classified as infill.

Figure 4: Conventional Density Housing in Sorell

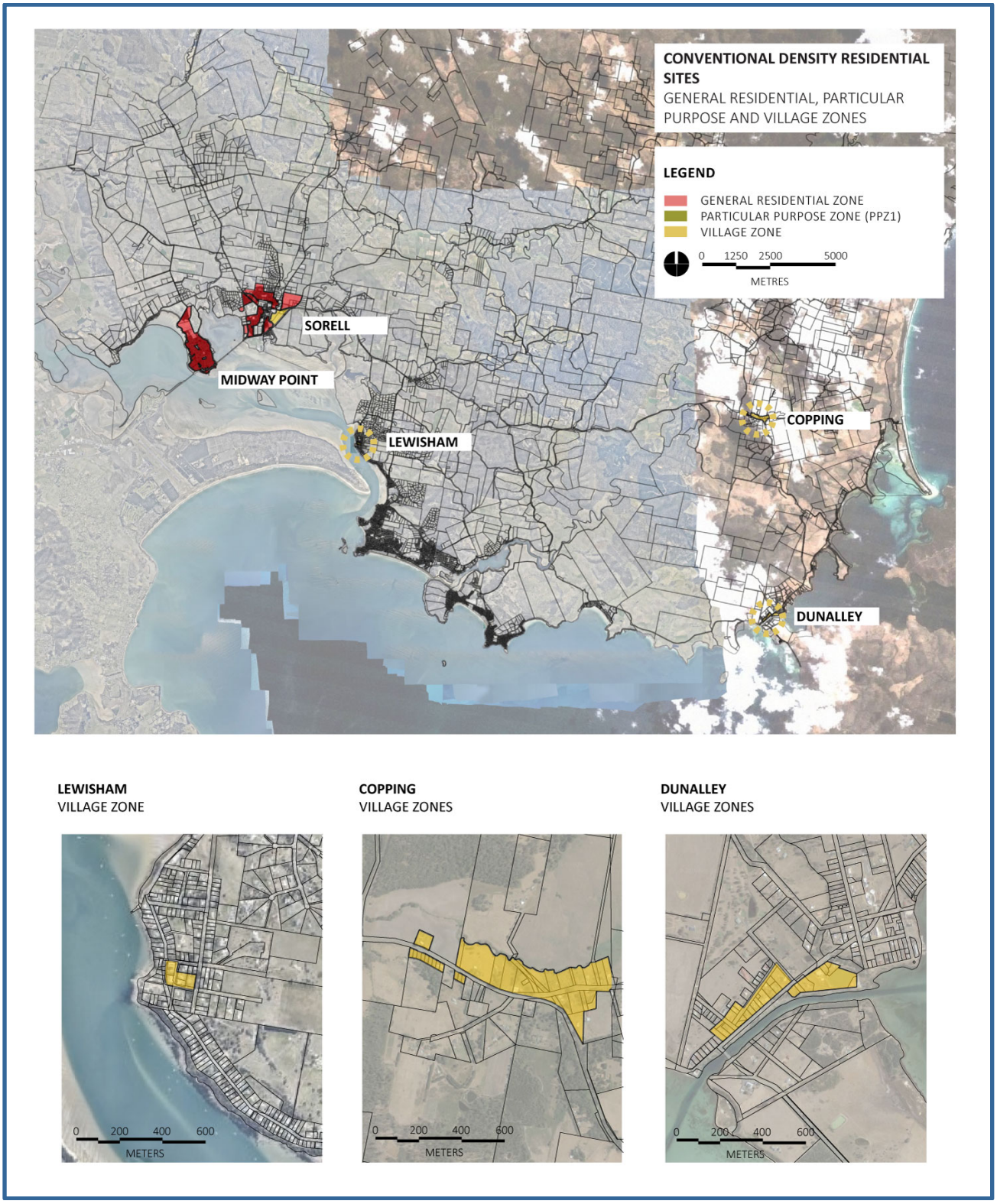


Figure 5: Conventional Density Residential Sites

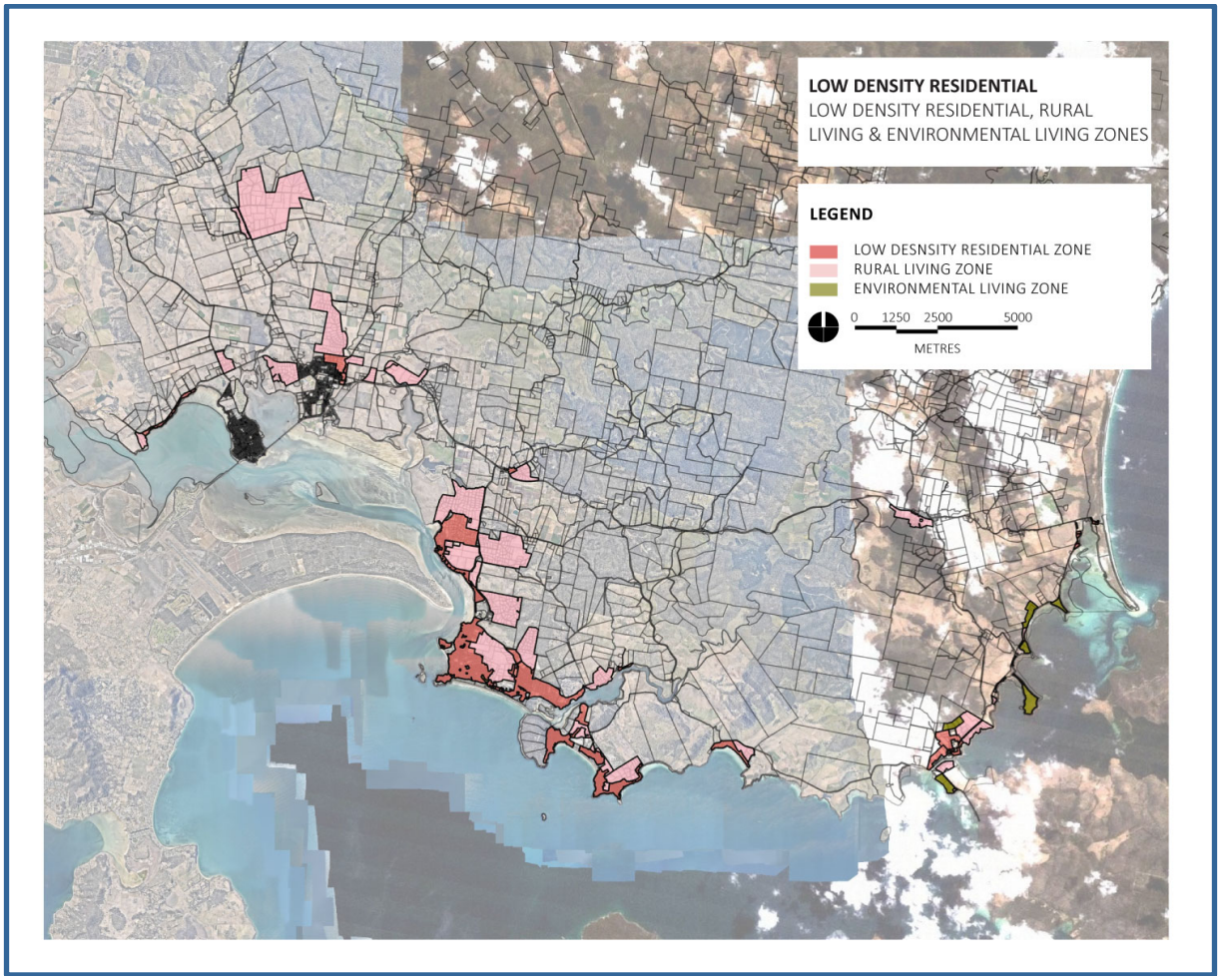


Figure 6: Low Density Residential Sites

Figure 7: Low Density Housing in Sorell

Greenfield Sites

The greenfield sites identified above in Sorell are located in the Particular Purpose – Urban Growth Zone or on large undeveloped sites in Midway Point North. These will contain conventional density residential development.

Table 11: Greenfield Residential Land Supply

	Vacant (ha) or approved lots	Vacant Undersized (ha)	Underutilised (ha)
Lot 1 and 37 Pawleena Road, Sorell – 280 lots approved	280 lots	-	-
Lot 30 Wolstenholme Drive, Sorell – 30 lots approved	30 lots	-	-
Lot 1 Penna Road, Midway Point – 22 lots approved	22 lots	-	-
Lot 200 Penna Road, Midway Point – 13 lots approved	13 lots	-	-
General Residential Zone – Greenfield sites in Sorell (20 Arthur Highway) and Midway Point (195-227 and 252 Penna Road)			
Identified land	14.88	-	6.38
Land subject to significant constraints	-2.99	-	-
Land subject to likely constraints	-1.55	-	-1.16
Subtotal	**10.34**	-	**5.21**
Particular Purpose (Urban Growth) Zone			
Identified land	12.56	-	13.58
Land subject to significant constraints	-0.41	-	-
Land subject to likely constraints	-4.32	-	-3.12
Subtotal	**7.83**	-	**10.46**
TOTAL	**345 lots and 18.17ha**		**15.67ha**

Infill Sites

With the greenfield sites having been addressed separately, the remainder of the conventional density residential land supply in the municipality consists of the following:

- Conventional density infill sites in the General Residential Zone.
- Residential sites within the Village Zone.

It is noted that three properties in the General Residential Zone already have planning approvals in place; these are reflected in Section 3.3 below, and no further analysis of the constraints is provided.

Table 12: Infill Conventional Density Residential Land Supply

	Vacant (ha) or approved lots	Vacant Undersized (ha)	Vacant Portion* of Underutilised (ha)
Lot 91 Gatehouse Drive – 86 lots approved	86 lots		
59-61 Tasman Highway – 22 lots approved	22 lots		
General Residential Zone			
Identified land	24.85	0.31	36.69
Land subject to significant constraints	-0.67	-0.02	?**
Land subject to likely constraints	-7.29	-0.09	?**
Subtotal	**16.89**	**0.19**	
Village Zone			
Identified land	1.47	0.12	19.09
Land subject to significant constraints	-0.23	-0.03	?**
Land subject to likely constraints	-0.03	-	?**
Subtotal	**1.21**	**0.09**	
TOTAL	**108 lots and 18.1ha**	**0.28ha**	**55.78ha minus constrained land**

** Total underutilised land minus number of lots x minimum lot size*
*** It is not possible to calculate the constraints on the underutilised land without creating site-specific shape files for each lot*

The remaining residential zones (Low Density Residential, Rural Living and Environmental Living) are where lower density development occurs in recognition of the servicing constraints and/or peri-urban or semi-rural character. All of the residential land within the Southern Beaches lies within these zones (aside from some small areas in the mixed use Village Zone). Land within these zones will supplement the Conventional Density Land but will not be a primary source of residential growth.

Table 13: Infill Low Density Residential Land Supply

	Vacant (ha)	Vacant Undersized (ha)	Vacant Portion* of Underutilised (ha)
Low Density Residential Zone			
Identified land	62.71	43.98	83.86
Land subject to significant constraints	-2.72	-2.63	?**
Land subject to likely constraints	-5.55	-3.66	?**
Subtotal	**54.43**	**37.69**	
Low Density Residential Zone – Dunalley Area 1			
Identified land	11.48	0.53	4.22
Land subject to significant constraints	-0.23	-0.08	?**
Land subject to likely constraints	-0.65	-0.03	?**
Subtotal	**10.60**	**0.42**	
Low Density Residential Zone – Dunalley Area 2			
Identified land	3.18	0.63	16.03
Land subject to significant constraints	-1.60	-	?**
Land subject to likely constraints	-	-0.09	?**
Subtotal	**1.58**	**0.53**	
Low Density Residential Zone – Connolleys Marsh			
Identified land	2.60	0.87	0.00
Land subject to significant constraints	-2.42	-0.87	
Land subject to likely constraints	-0.05	-	
Subtotal	**0.13**	**0**	
Rural Living Zone (1ha minimum lot size)			
Identified land	224.12	12.76	388.46
Land subject to significant constraints	-15.89	-1.04	?**
Land subject to likely constraints	-27.31	-0.71	?**
Subtotal	**180.92**	**11.01**	
Rural Living Zone – Area B (10ha minimum lot size)			
Identified land	91.15	2.23	0.00
Land subject to significant constraints	-8.01	-	
Land subject to likely constraints	-7.30	-0.08	
Subtotal	**75.83**	**2.15**	
Environmental Living Zone			
Identified land	0.00	8.42	0.00
Land subject to significant constraints	-	-1.66	
Land subject to likely constraints	-	-0.77	
Subtotal	**0.00**	**5.99**	
TOTAL	**323.49**	**57.79**	**492.57 minus constrained land**

** Total underutilised land minus number of lots x minimum lot size*

*** It is not possible to calculate the constraints on the underutilised land without creating site-specific shape files for each lot*

3.2 Residential Land Demand

Population Projections

The Department of Treasury and Finance 2019 projections for Sorell indicate that the population across the municipality may increase from 15,221 in 2018 to 19,140 by 2038. This is an increase of 3,919 people, which averages out to an annual increase of 196 people.

The 2011 and 2016 ABS census data recorded 2.4 persons per household in Sorell. If household sizes remain similar into the future, an increase of 3,919 people would thus require approximately 1,633 additional dwellings to be provided by 2038, which averages out at 82 dwellings per year.

Census Data on Unoccupied Dwellings

The 2016 Census recorded 6,771 private dwellings in Sorell, 1,270 (18.8%) of which were unoccupied. The level of unoccupied dwellings is higher than for Tasmania (14%) and reflects that there are a number of holiday homes in the municipality. The future housing demand is likely to continue to include people seeking holiday homes as well as those seeking permanent residences. This should be factored into the future demand to ensure that not just resident population growth but also continued growth of holiday homes is considered. To address this, an additional 10% has been factored into the overall assessment of demand.

Building Approvals

The building approval data for completed dwellings from 2009 to 2018 shows that 996 dwellings were constructed over the last decade with an average of 100 constructed dwellings per year (refer to Figure 8).

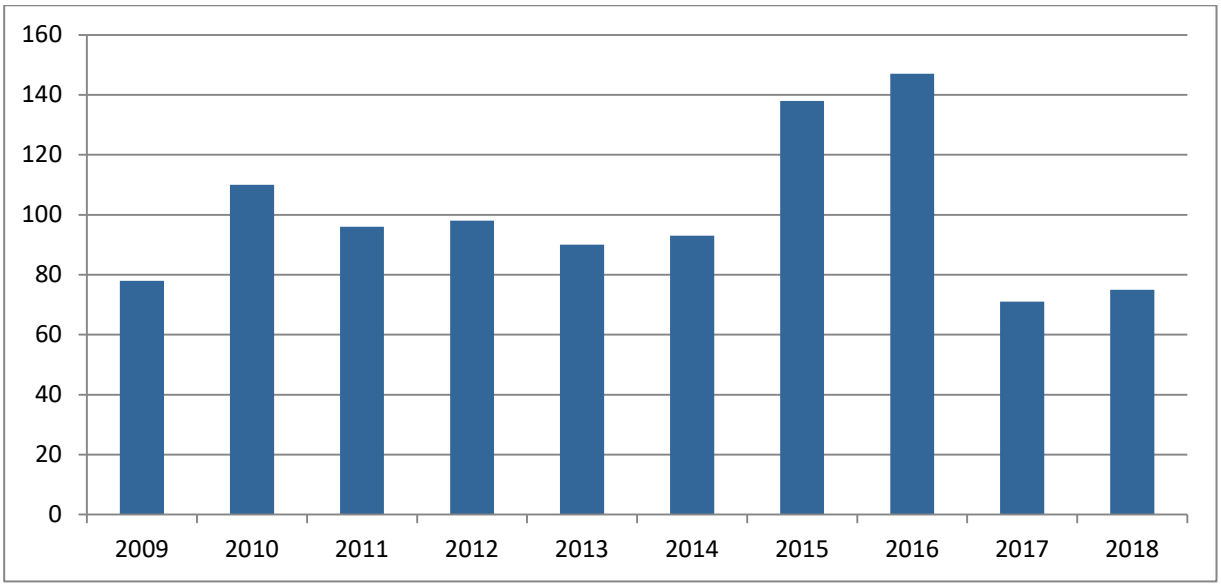


Figure 8: Constructed Dwellings 2009-2018

Subdivision Approvals

The subdivision approval data for completed applications from 2009 to 2018 recorded the creation of 838 lots during this time (refer to Figure 9). The average annual completion is 84 lots, but from 2014-2018 this averaged 136 lots per year. It should be noted that some of the applications for larger numbers of lots involved multiple stages of development over several years, and that the completion date is only recorded when the final lot is created. This explains the significant annual fluctuations in completion dates (e.g. 407 in 2015 and 7 in 2013).

632 (75%) of the lots were created in the conventional density General Residential Zone. The remaining 206 lots (25%) were created in the lower density Village, Low Density, Rural Living, Environmental Living Zones and General Business Zones.

52% (435) of the lots were created in Sorell, 29% (241) in Midway Point and 19% (162) elsewhere. This reflects the Southern Tasmania Regional Land Use Strategy's intent to focus growth on Sorell as a major satellite, with Midway Point having a minor satellite role and the other settlements having lower growth.

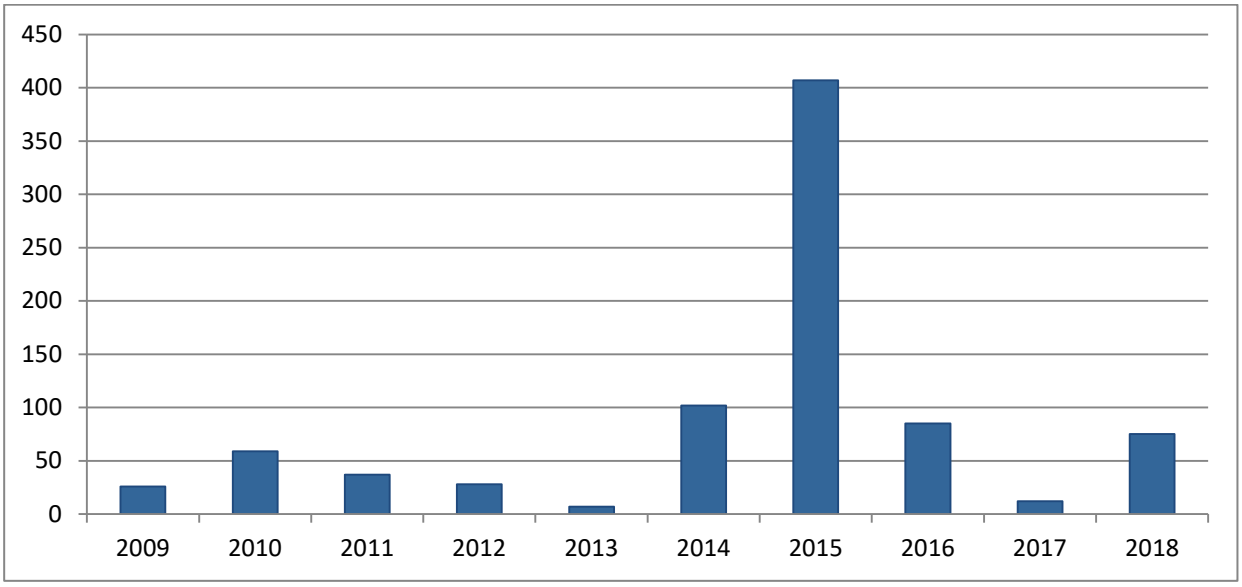


Figure 9: Completed Subdivisions 2009-2018

Overall Assessment of Demand

Both past (building and subdivision approvals) and future (population projection) trends indicate an annual demand of around 82 dwellings per year. To accommodate for the likely continued demand for holiday homes, this report adopts an additional 10% on top of this. The overall assessment of demand is for 1,796 dwellings over the next 20 years, with an average of 90 dwellings per year. Due to the population projections pointing to the majority of growth occurring in the next decade, the annual dwelling demand is projected to range from 113 dwellings in 2019 to 65 dwellings in 2038. The annual dwelling demand projections are provided in Table 14 and Figure 10.

Table 14: Projected dwelling demand 2019 to 2038

Year	Population	Annual Population Increase	Annual Dwelling Demand (@2.4 persons per household and 10% additional dwellings for holiday homes)
2018	15,221		
2019	15,467	246	113
2020	15,709	242	111
2021	15,947	238	109
2022	16,181	234	107
2023	16,409	228	105
2024	16,632	223	102
2025	16,851	218	100
2026	17,063	213	97
2027	17,270	207	95
2028	17,472	201	92
2029	17,666	194	89
2030	17,853	187	86
2031	18,033	180	83
2032	18,207	174	80
2033	18,375	169	77
2034	18,539	163	75
2035	18,697	158	72
2036	18,849	153	70
2037	18,997	148	68
2038	19,140	143	65
	Total	**3,919**	**1,796**
	Annual Average	**196**	**90**

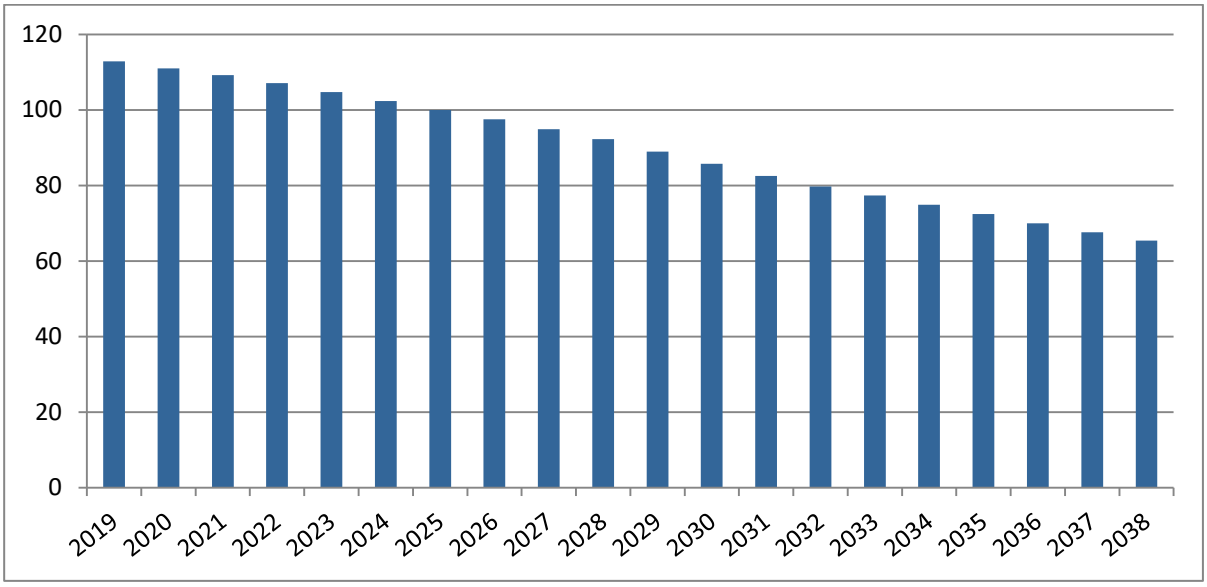


Figure 10: Projected dwelling demand 2019 to 2038

3.3 Years of Supply

In considering the future residential land supply, assumptions have been made that as per the Southern Tasmania Regional Land Use Strategy, the demand for dwellings will be primarily directed to Sorell, with Midway Point playing a secondary role, and Low or Very Low Growth Strategies focused on consolidation for the other settlements.

The Southern Tasmania Regional Land Use Strategy adopts a 50%/50% ratio of greenfield to infill scenario for the Hobart metropolitan area in recognition that there are higher costs to infill development (p. 87). Infill development includes constructing higher density dwellings, which can be more difficult to justify in regional locations where access to employment, retail and public transport services is more difficult to achieve. To this end, a ratio of 70% greenfield to 30% infill is a more appropriate scenario for Sorell in recognition that infill opportunities will be generally more limited to constructing conventional density development within existing urban boundaries.

With an identified demand of 1,796 dwellings by 2038, applying this ratio to Sorell means that it needs to supply 1,257 greenfield lots and 539 infill lots.

Tables 15 and 16 provide calculations of the greenfield and infill residential land supply within Sorell. They consider the unconstrained portion of the Vacant land, i.e. that which is readily available for development. In the case of the greenfield land supply, both the Vacant and Underutilised Land is considered as all land is to be made available for Urban Growth.

Table 15: Years of Unconstrained Greenfield Residential Land Supply

	Unconstrained land supply (ha)	Net developable land (ha)	@ 15 dwellings per net developable hectare	Potential number of lots
Approved lots				345
Vacant and underutilised land	33.84	22.67	340	340
Supply				**685**
Demand to 2038				**1,257**
Shortfall				**-572**
Years of current supply (70% of annual requirement in table 14)				**9.5 years**

Table 16: Years of Unconstrained Vacant Infill Residential Land Supply

	Vacant unconstrained land supply (ha)	Net developable land (ha) (refer pp. 13-14)	@ dwellings per net developable hectare (refer pp. 13-14)	Potential number of lots
General Residential Zone	108 lots and 16.89 ha	11.32	15	108 + 170
Village Zone	1.21	0.81	15	12
Low Density Residential Zone	54.43	48.99	4.5	220
Low Density Residential Zone – Dunalley Area 1	10.60	9.54	11.25	107
Low Density Residential Zone – Dunalley Area 2	13.06	11.75	6	71
Low Density Residential Zone – Connolleys Marsh	0.13	0.12	3	0
Rural Living Zone	180.92	162.83	0.9	147
Rural Living Zone – Area B	75.83	72.04	0.095	7
Environmental Living Zone	0.00	0.00	0.015	0
Supply				**842**
Demand to 2038				**539**
Excess				**+303**
Years of supply				**Over 20 years**

These calculations show that there is currently only 9.5 years of greenfield land supply, and that 572 additional lots are required by 2038. As per the Southern Regional Land Supply Strategy, these are to be provided primarily in Sorell and also potentially in Midway Point.

The infill supply of unconstrained Vacant infill land equates to over 20 years. However, developing infill sites can take some time as smaller subdivisions can be less profitable due to a lack of economics of scale. To this end, some of the Vacant Undersized and Underutilised land identified in Table 13 may need to be utilised to meet the demand for infill sites.

4 INDUSTRIAL

4.1 Industrial Land Supply

The existing land within the Light Industrial Zone is illustrated in Figure 11. There are only 0.29 hectares of Vacant Industrial land (1 site) that are above the minimum industrial lot size (1,000 square metres). There are four Vacant Underutilised Industrial sites between 601 and 819 sqm. No underutilised industrial sites were identified.

In 2016 there was 0.45ha of Vacant Industrial land (2 sites) above the minimum industrial lot size, i.e. 0.16ha has been occupied since this time.

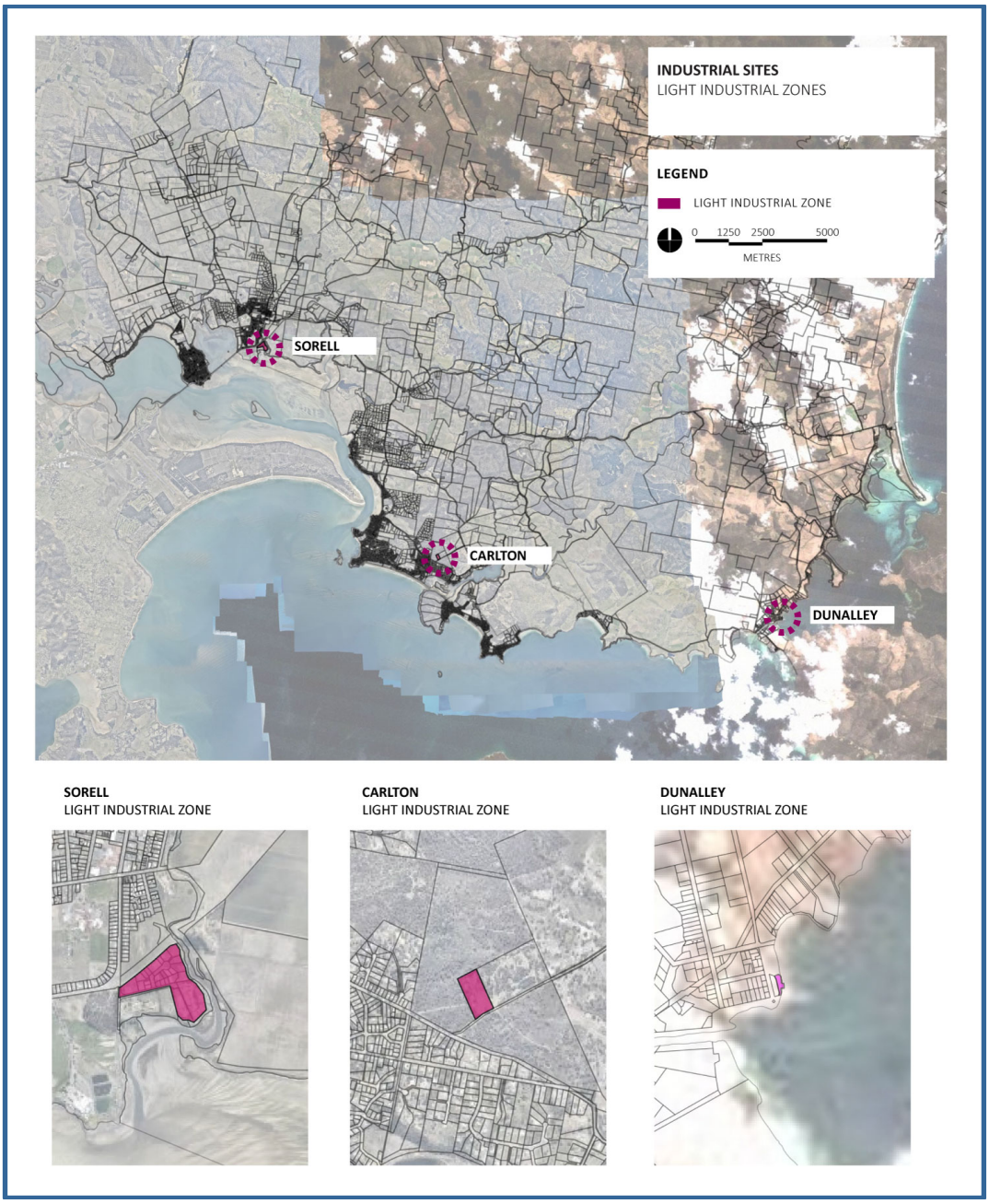


Figure 11: Industrial Sites

4.2 Industrial Land Demand

Given there is limited industrial land supply in Sorell, the historic trends of approvals may not be a useful indicator of future demand. There was only 1 subdivision during the 2009-2018 period. There were 30 industrial buildings approved from 2009 to 2018, averaging 3 buildings per year.

The Southern Tasmania Industrial Land Study - Stage 1 (July 2011) projected that Sorell would require an additional 1.5 to 1.8 hectares of industrial land for local service industries from 2011 to 2026. As no additional land has been provided from 2011 onwards, this demand has not yet been fulfilled, so Table 17 below continues to list this. With slightly lower annual population growth rates projected from 2027 onwards (refer to Table 1), this demand would be extended for the 10 years from 2027 to 2038 (albeit at a slightly lower rate) as follows:

Table 17: Population-based Demand for Local Service Industries

Timeframe	Number of years	Hectares per year	Total demand
2011 to 2026	15 years	0.10 to 0.12 hectares	1.5 to 1.8 hectares
2027 to 2036	12 years	0.08 to 0.10 hectares	1.0 to 1.2 hectares
TOTAL			**2.5 to 3.0 hectares**

Opportunities have been identified to capitalise on the irrigation scheme to create export-oriented industries such as agricultural, horticultural and viticultural processing, as well as some transportation and warehousing activities related to these[6]. The Southern Tasmania Industrial Land Strategy (July 2013) identifies that these industries typically require lots from 2,000 sqm to 2+ hectares.

Sometimes value-added processing developments are proposed by landowners seeking to locate them on the rural sites on which the products are grown rather than within industrial estates. Council should consider having a policy that is supportive of such developments occurring and that sets out the planning matters that would need to be considered in any such proposal.

In considering the potential demand for industrial land, the following factors have been considered:

- To take a conservative approach, the local services demand should be doubled to take into account any latent demand that has built up in recent years during which time the supply of land has been constrained, i.e. 5 to 6 hectares.
- Export-oriented industries and smaller-scale transportation and warehousing activities require a range of lot sizes from 2,000 sqm to 2+ hectares, i.e. around 5 hectares.
- In order to create critical mass and justify the investment in an industrial estate, it should be at least a few hectares in area.
- Rurally-located industries should also be supported.

Based on above, **10 to 11 hectares** may be required by 2036, and Council should also support value-added processing on rural sites.

4.3 Years of Supply

Based on the supply and demand identified above, a potential shortfall of 10.71 hectares of industrial land has been identified as per Table 18.

[6] Refer to the SERDA Economic Infrastructure Development Study (2015) and SERDA Regional Workforce Planning Report (2017) by KPMG

Table 18: Industrial Land Supply

Supply	0.29 ha
Demand 2019 to 2038	11.00 ha
Shortfall	**-10.71 ha**
Years of supply (0.55 ha per year)	**Less than 1 year**

Figure 12: Sorell Industrial Estate

5 COMMERCIAL

5.1 Commercial Land Supply

The existing commercial sites are depicted in Figure 13. Sorell contains the majority of the commercially zoned land in the General Business Zone. There are also local centres in Midway Point, Forcett, Lewisham, Dodges Ferry, Carlton, Primrose Sands, Dunalley and Copping that contain land in the Local Business and Village Zones.

Within the General Business, Local Business and Village Zones it is calculated that there is 8.05 hectares of land available for commercial development. This includes non-vacant properties in the General and Local Business Zones which currently contain only dwellings. These sites could potentially be developed for commercial purposes over time.

A breakdown of the vacant and underutilised commercial land supply is provided in Table 19.

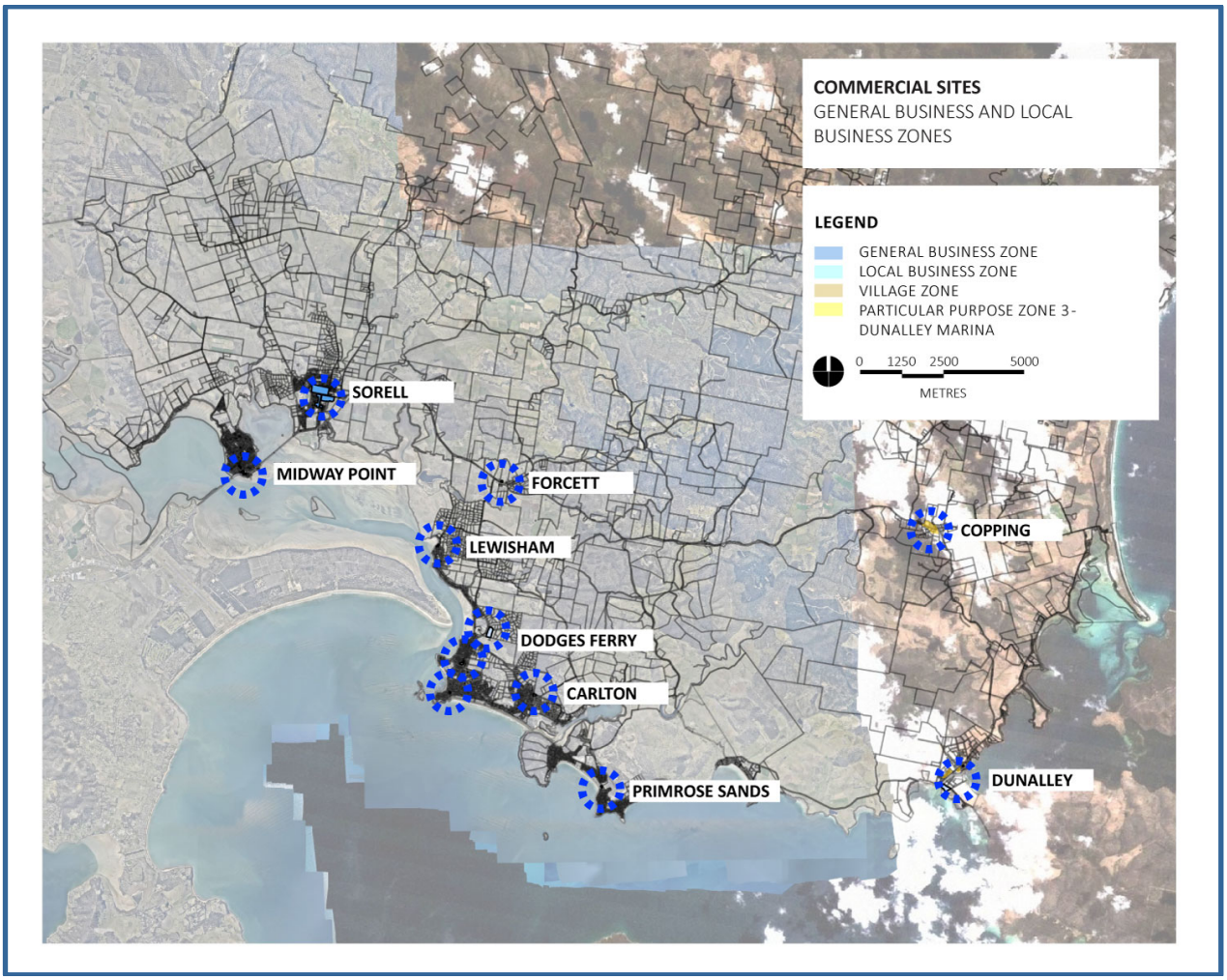


Figure 13: Commercial Sites

Table 19: Commercial Land Supply

	Vacant	Vacant Portion of Underutilised	Potential Commercial (contains dwelling)	TOTAL
General Business Zone	2.06	0.52	3.79	
Local Business Zone	1.45		0.23	
Village Zone	0.00			
Subtotal	**3.51**	**0.52**	**4.02**	
TOTAL				**8.05ha**

5.2 Commercial Land Demand

There have been relatively few approvals issued for additional business premises over the last few years, with only 4 recorded in the last decade. The most significant of these was the Coles development in 2011.

There are a number of developments proposed or underway in the Sorell town centre as follows:

- The South-East Emergency Services Hub west of the Council offices. A 1.41ha site has been set aside for this.
- A childcare facility north of the Council offices. A 2,833 sqm site has been set aside for this.
- Residential development on the western side of Dubs and Co Drive on a 1ha site.

The areas for these sites have been removed from the vacant land calculations.

Council are also aware of a number of proposals for new businesses on Dubs and Co Drive, although these are yet to be developed.

5.3 Years of Supply

At present 20% of the 38.64 hectares of commercial land within the municipality is vacant or contains only a dwelling.

With the recent establishment of a second supermarket in Sorell, and the continued expansion of the nearby Cambridge Park bulky goods retail area and Hobart Airport expansion plans, it is anticipated that the demand for additional commercial premises within the municipality will not exceed this supply within the next 20 years. The only exception will be to identify some additional land for Local Business or Village zoning in the Southern Beaches where the provision of retail facilities to the local residents is currently minimal.

In the longer term, should the school masterplanning process identify any surplus land near the town centre, there is a possibility that this could be rezoned for commercial purposes.