# ENVIRONMENT AND FOOD PRODUCTION AREAS REVIEW 2021

*Statement of Position*

STATE PLANNING COMMISSION

Pursuant to Section 7 of the *Planning, Development & Infrastructure Act 2016*

Published 4 June 2021

Government of South Australia
Attorney-General's Department

# BACKGROUND

On 30 March 2021, the State Planning Commission (Commission) announced the inaugural review of the Environment and Food Production Area (EFPA) boundary. This review is a statutory requirement every 5 years under the *Planning, Development and Infrastructure Act 2016* (the Act). As legislation was introduced in 2017 this means that the review is to be completed by 2022.

The EFPA boundaries may be varied only under certain circumstances. These circumstances are referred to as the ***Three Point Test*** and are set out under section 7(3) of the Act as follows:

If the Commission is satisfied, that:

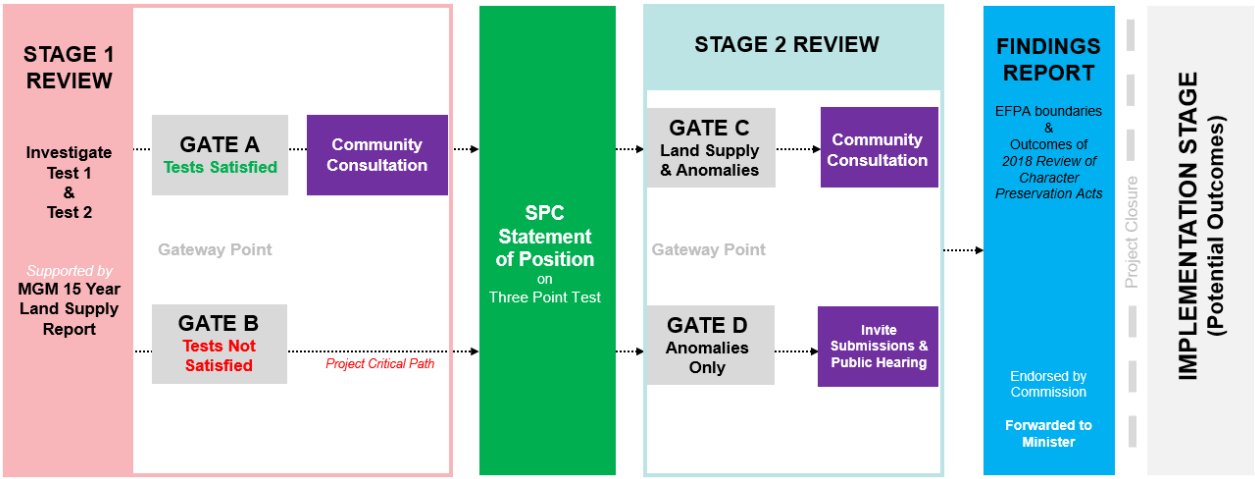
Test 1: an area or areas within Greater Adelaide outside environment and food production areas are unable to support the principle of urban renewal and consolidation of existing urban areas; and

Test 2: adequate provision cannot be made within Greater Adelaide outside environment and food production areas to accommodate housing and employment growth over the longer term (being at least a 15-year period); or

Test 3: that the variation is trivial in nature and will address a recognised anomaly.

# EFPA REVIEW PROCESS

The Commission has adopted a staged program with defined project gateways to manage the program scope and potential outcomes of the review process – as outlined in the diagram below:




Stage 1 of the review is an investigation as to whether there is at least a 15-year supply of residential and employment land (Tests 1 and 2). To do this requires an analysis of Greater Adelaide's land supply and demand. This analysis is contained in the *Environment and Food Production Areas (EFPA) Review Report* at Appendix 1 which is a companion document to this Statement of Position.

The outcome of this investigation work leads to project gateways – Gate A (Tests 1 & 2 satisfied) or Gate B (Tests 1 & 2 not satisfied). Gate B is chosen if there is an adequate supply of land for residential and employment purposes for at least the next 15 years, if not Gate A is chosen. If Gate A is chosen a full review of land supply as well as anomalies is considered to be in the scope of the review (Gate C). The Gate B pathway leads to the scope of the review being contained to minor variations that are recognised as anomalies (Gate D).

The outcome of analysis of these pathways leads to inform the Commission's Statement of Position on the **Three Point Test**.

**Commission's Position**

It is the Commission's position that there is an adequate provision of land in Greater Adelaide to accommodate housing and employment growth over the next 15 years.

Therefore the review will follow the Gate B pathway which leads on to Gate D and sets the scope of the review as Test 3 only - the consideration of variations of the boundary that are trivial in nature and will address a recognised anomaly.

This position is based on the Commission's assessment of the requirements under the Act, outlined in the *Three Point Test* and the evidence base presented in the EFPA Review Report appended to this Position Statement.

# RELATIONSHIP BETWEEN EFPA AND CHARACTER PRESERVATION DISTRICTS (CPD)

Further to this Position Statement, the Commission also notes that Section 7(4) of the PDI Act establishes a clear legal relationship between the EFPA and the CPD, which are governed under the *Character Preservation (Barossa Valley) Act 2012* and *Character Preservation (McLaren Vale) Act 2012* (the CP Acts). This relationship means any removal of land within a CPD will trigger the application of the EFPA over that land instead.

It is important to note that the CPD are not currently within the EFPA. This means that any recommendations from the Commission's assessment of CPD will only become relevant to any future changes to the EFPA, in the event that the CP Acts are first amended by Parliament to vary or remove land from CPD.

The State Government's previous 2018 CP Acts Review recommended that the Commission investigate the merits of amendment of the CPD for eight identified locations, in the context of Greater Adelaide's growth. The scope of the Commission's review of the EFPA boundaries will therefore also include an assessment of those eight locations.

In line with the recommendations from the 2018 CP Acts Review, the Commission is not inviting further submissions regarding boundaries or other matters relating to CPD through this current EFPA boundary review process.

Further information regarding the previous 2018 CP Acts Review can be accessed via the PlanSA Portal.

# EFPA REVIEW REPORT (STAGE 1) SUMMARY

The EFPA Review Report (Stage 1) provides a detailed overview of residential and employment land supply, and demand within the Greater Adelaide Planning Region (GAPR) over a 15-year time period (Appendix 1). The following tables represent a high level summary of the findings of the analysis on residential and employment land supply (allotments), and estimated demand to 2036:

## Residential

| | LAND SUPPLY | ESTIMATED DWELLING REQUIREMENT 2021-2036 | DEMAND & SUPPLY ALIGNMENT |
|---|---|---|---|
| Medium Growth | 265,000 | 94,500 | 15+ years |
| High Growth | 265,000 | 135,000 | 15+ years |

## Employment

| | ZONED LAND SUPPLY (June 2020) | FUTURE LAND SUPPLY (June 2020) | VACANT LAND REQUIREMENT 2021-2036 | DEMAND & SUPPLY ALIGNMENT |
|---|---|---|---|---|
| Medium Growth | 1,900 ha | 1,800 ha | 950 ha | 15+ years |
| High Growth | 1,900 ha | 1,800 ha | 1,400 ha | 15+ years |

# CONCLUSION

Tests 1 and 2 in Section 7(3)(a) of the PDI Act are not satisfied as there is deemed to be sufficient supply of land to support housing and employment growth for at least the projected 15-year timeframe.

Accordingly, the Commission will limit the scope of the remainder of the EFPA Boundary Review (Stage 2) to the consideration of proposals that satisfy the two relevant components of Test 3, which are:

1. trivial in nature; and

2. will address a recognised anomaly.

This will also include applying Test 3 to eight locations identified in the review of Character Preservation Districts conducted in 2018, in the event that the relevant Acts are first amended by Parliament to vary or remove land from the Character Preservation Districts.

# APPENDIX I

PlanSA

# ENVIRONMENT AND FOOD PRODUCTION AREAS (EFPA) REVIEW REPORT (STAGE 1)

Government of South Australia
Attorney-General's Department

# 1.0 BACKGROUND

This EFPA Review Report seeks to provide an overview of residential and employment land supply and demand within the Greater Adelaide Planning Region (GAPR) over a 15 year time period. The material in this document will help inform the statutory review of the EFPA boundaries in 2021. This report has been informed by the Land Supply Report (LSR) for Greater Adelaide, which is a part of the Department's broader Growth Management Program.

The key differences between the two reports is the level of detail and the timeframe, as outlined below.

| Report name | Timeframe | Regional Analysis |
|---|---|---|
| Land Supply Report (LSR) | 10 years | YES (10 regions) |
| EFPA Review Report | 15 years | NO (Greater Adelaide only) |

The EFPA legislation was introduced in late 2017 and sought to:

- Protect our valuable food producing and rural areas, as well as conserving our prized natural landscapes, tourism and environmental resources;
- Support our sustainable growth and encourage the building of new homes in our existing footprint where supporting infrastructure already exists; and
- Provide more certainty to food and wine producers as well as developers on the direction of future development in metropolitan Adelaide.

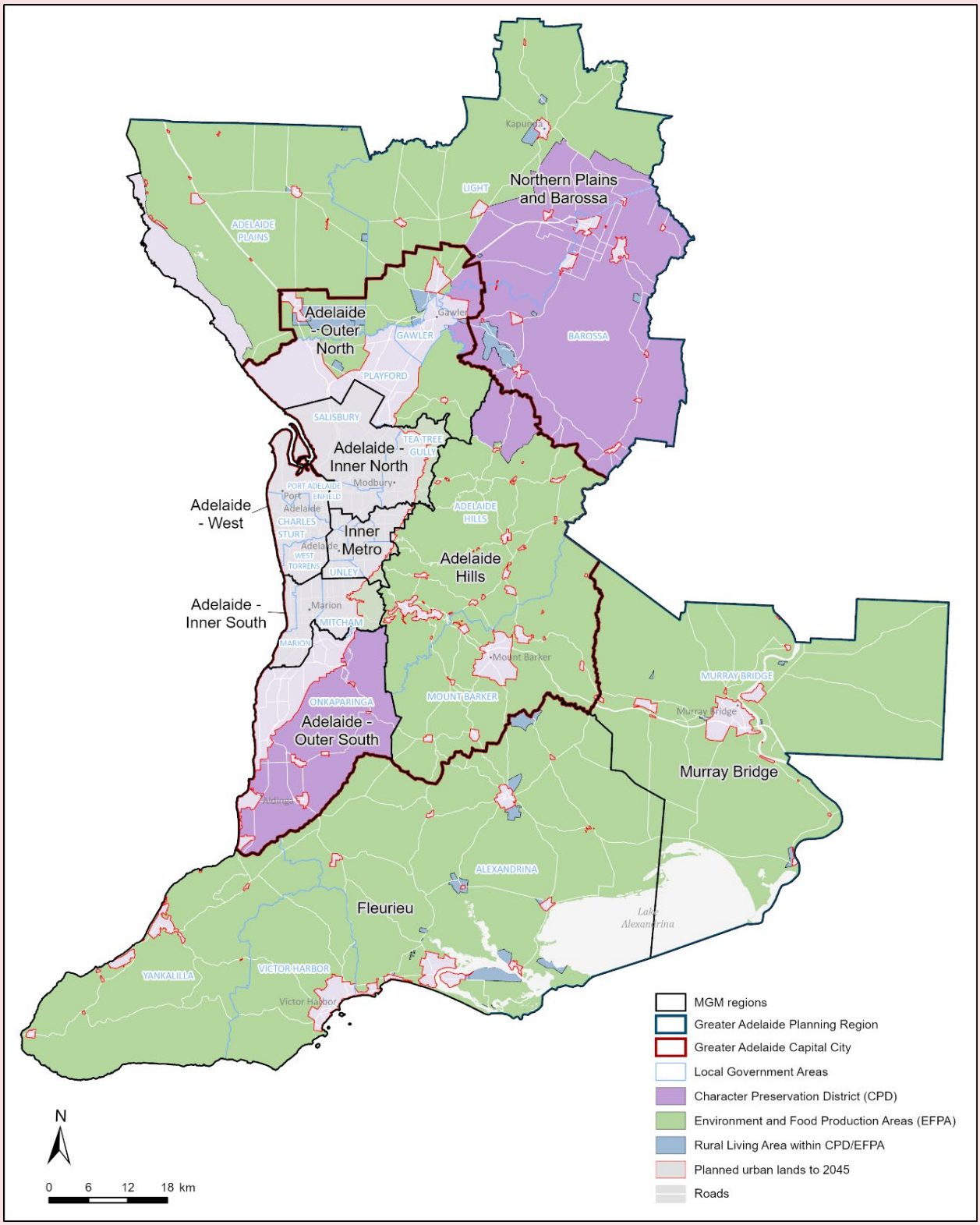
The EFPA legislation covers land located within fourteen Local Government Area's (LGA's), as shown in Figure 1 and detailed below:

- Adelaide Plains Council
- Light Regional Council
- Mount Barker District Council
- The Rural City of Murray Bridge
- Adelaide Hills Council
- City of Tea Tree Gully
- City of Playford
- City of Salisbury
- Campbelltown City Council
- City of Burnside
- City of Mitcham
- Alexandrina Council
- City of Victor Harbor
- The District Council of Yankalilla

And the following Councils are impacted given their location within the Character Preservation Districts (CPD):

- City of Onkaparinga (McLaren Vale)
- The Barossa Council (Barossa)

**Figure 1:** Greater Adelaide Planning Region (GAPR)



# 2.0 EFPA REVIEW PROCESS

The Commission is required to review the EFPA every 5 years and operationally this means a review is due for completion in 2022. Under *the Act*, the EFPA boundaries may be varied only under certain circumstances. These circumstances are referred to as the *Three Point Test*[1], which reads as follows:

1. *An area or areas within Greater Adelaide outside environment and food production areas are unable to support the principle of urban renewal and consolidation of existing urban areas; and*

2. *adequate provision cannot be made within Greater Adelaide outside environment and food production areas to accommodate housing and employment growth over the longer term (being at least a* ***15-year period****); or*

3. *that the variation is trivial in nature and will address a recognised anomaly.*

Test 1 and 2 requires analysis of Greater Adelaide's 15-year housing and employment land supply, which will be informed by this report. Critically, when reading through this report, it is important to note that Test 2 does not allow consideration of:

- land supply analysis at a sub-regional level; OR
- specific forms of residential land supply (i.e. greenfield, township or urban infill); OR
- specific forms of employment land supply (i.e. for heavy, light or special industry).

Test 3, does not rely upon having to argue insufficient housing or employment land supply. Instead, any request assessed under this test must demonstrate the proposed variation is both, not either or, trivial in nature and will address a recognised anomaly.

# 3.0 DEVELOPMENT TRENDS

This section of the report provides an overview of residential and employment land development trends which have been identified within the Land Supply Report (LSR) for Greater Adelaide.

## 3.1 Residential Development Trends

The LSR provides analysis on residential development trends, which occurred between 2010 and June 2020, including rates of consumption for the various types of residential development (as defined in Figure 2 below).

1 Part 1, Section 7(3) of the Act, 2016

**Figure 2:** Residential Development Type Definitions

**Urban Infill - General**

Relates to small scale, dispersed residential development which:

- Occurs on land located within the established urban area of Metropolitan Adelaide; AND
- Occurs on land within a residential zone that supports land division.

**Urban Infill - Strategic**

Relates to co-ordinated, typically high yielding, residential development that:

- Occurs on land located within the established urban area of Metropolitan Adelaide; AND
- Occurs on land within a zone that supports medium to high density residential development (i.e. Urban Corridor, Urban Core or Capital City).

**Greenfield**

Residential development which occurs over land located on the fringe of the established urban area within the Greater Adelaide Planning Region, and land identified for future urban development in *The 30-Year Plan for Greater Adelaide - 2017 Update*.

**Township**

Residential development which occurs on land contained within townships separated from built up areas of Metropolitan Adelaide within the Greater Adelaide Planning Region. These townships are distributed throughout the Environment and Food Production Areas (EFPA) and Character Preservation Districts (CPD) regions.

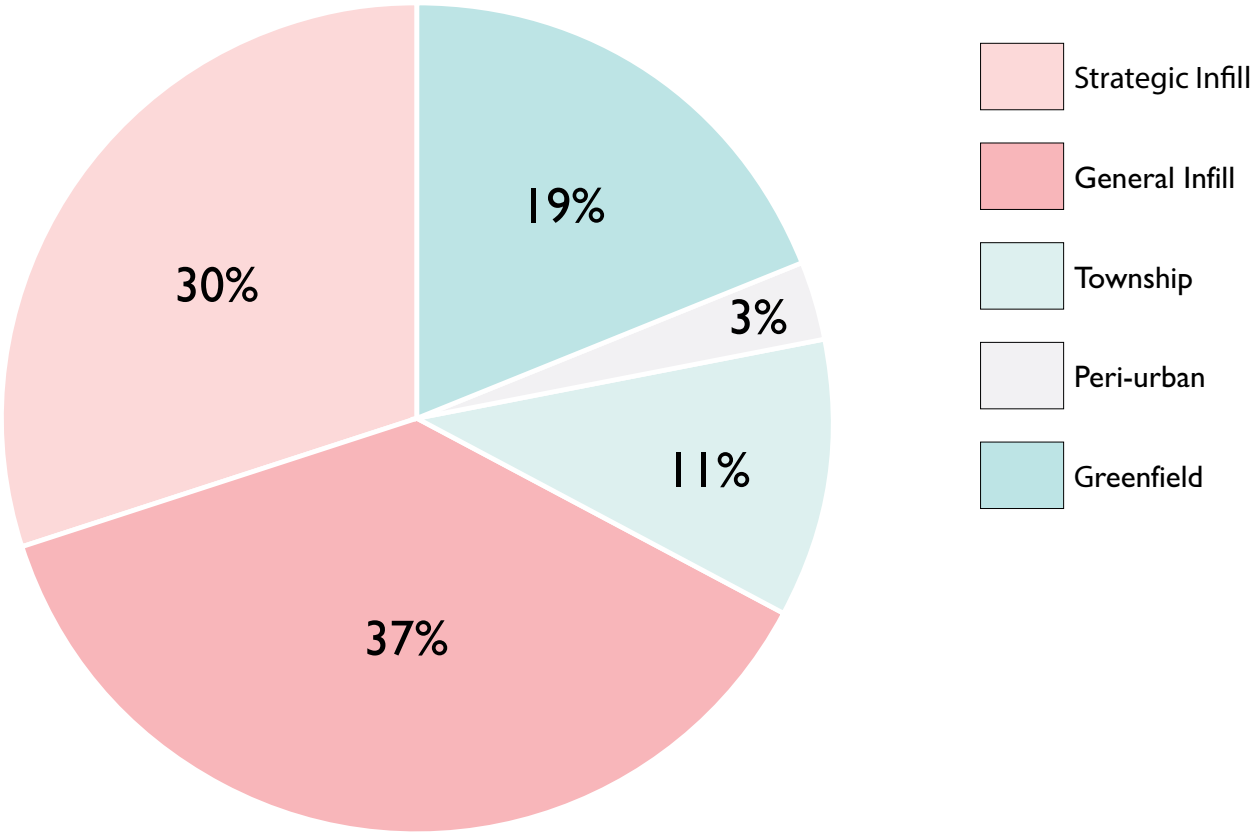
**Peri-Urban**

Residential development located outside the Planned Urban Lands 2045 boundary but within the Greater Adelaide Planning Region.

### 3.1.2 Development Type

- Analysis of the total net dwelling increase between 2010 and June 2020, for each development type is shown in Figure 3, and summarised as follows:
  - General infill development accounted for 37% of the net dwelling increase.
  - Strategic infill development accounted for a further 30% of the net dwelling increase.
  - These forms of development occur within the established urban area of Metropolitan Adelaide.
  - Greenfield development was also a major contributor, accounting for 19% of the net dwelling increase over the same period.
  - Township development contributed a further 11%.

Figure 3: Net dwelling increase by development type, GAPR 2010 – June 2020




## 3.2 Employment Land Development Trends

The term employment land has emerged as a more appropriate term to classify 'industrial' land given the mixture of land uses accommodated within these precincts has evolved from hard industry to include a range of services such as retail trade. It is important to note, this report, and therefore this term, does not cover retail centre or CBD land supply.

The *Metropolitan Adelaide Industrial Land Strategy, 2007* (industrial land strategy) provided a baseline stocktake of employment (formerly referred to as industrial) land supply, within Greater Adelaide. When another stocktake of employment land was undertaken in 2018, this analysis identified the following:

- a total 630 hectares of vacant[2], zoned employment land was consumed between 2007-2018.
- prior to the Global Financial Crisis (GFC) vacant employment land was being consumed at a rate of approximately 110 hectares per annum.

2 Vacant land does not include vacant or underutilised buildings, or land assigned to 'other use'.

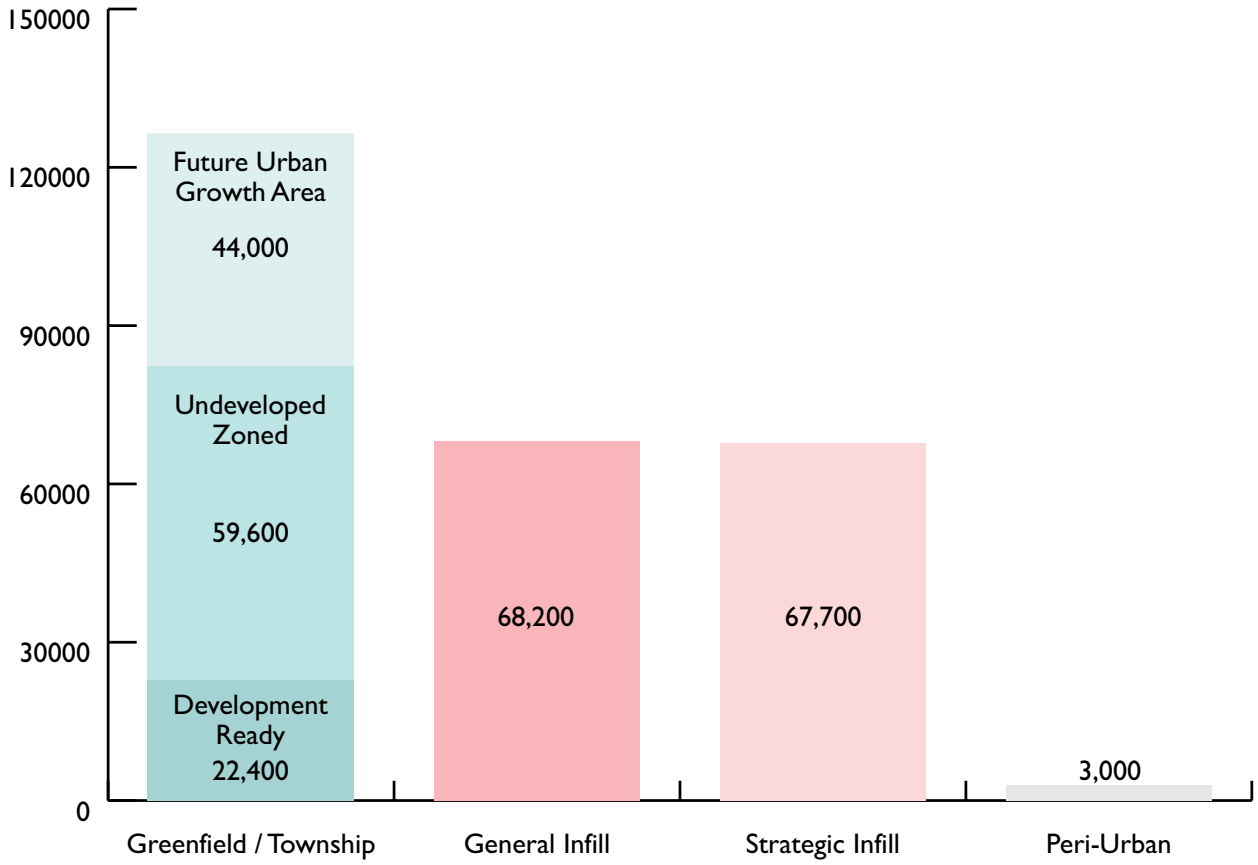
# 4.0 LAND SUPPLY

A June 2020 stocktake of residential and employment land supply within the GAPR boundary was undertaken as part of the Land Supply Report (LSR). The sub-sections below provide a high level summary and should be read in conjunction with the relevant maps, tables, figures and corresponding appendices, which provide regional level details.

## 4.1 Residential Land Supply

As of June 2020, the GAPR had an estimated potential supply of 265,000 residential lots. This supply is split across the range of development types as identified in Figure 4, and spatially distributed in Figure 5.

**Figure 4:** Residential Land Supply by Development Type, June 2020




*Development ready refers to zoned land, greater than 4,000sqm with an approved or proposed plan of division.

**Undeveloped zoned land refers to zoned land, greater than 4,000sqm which does not currently have an active plan of division, or is the 'balance' of an existing Greenfield development front.

*** Future Urban Growth Area refers to land identified within the 30 Year *Plan for Greater Adelaide 2017 Update*.

### 4.1.1 Greenfield and Township

As of June 2020, there was an estimated potential to create an additional 126,000 allotments from within identified Greenfield and Township land supply across the GAPR[3], as shown in Table 1. This supply has been broken down into three sub-categories, which help define the supply's market 'availability' in the short, medium and long term. These sub-categories are defined as follows:

- Development Ready; and
- Undeveloped Zoned; and
- Future Urban Growth Area.

**Table 1:** Greenfield and Township Land Supply, Greater Adelaide Planning Region June 2020

| | Development Ready | Undeveloped Zoned | Future Urban Growth Area | TOTAL |
|---|---|---|---|---|
| Greater Adelaide Planning Region | 22,400 | 59,600* | 44,000* | 126,000* |

*estimated yield based on sub-region yields recorded as of June 2020.

### 4.1.2 General Infill

As of June 2020, a total 168,600 residential land parcels within the established urban area of Metropolitan Adelaide were identified as satisfying current Development Plan criteria for land division.

Analysis undertaken as part of the LSR identified that not all of these allotments were likely to be developed in the short to medium term, if at all. Residential allotments which had a Capital to Site Value (CSV)[4] ratio less than, or equal to, 1.8 were considered the most likely to be developed in the short to medium term.

Applying this 'filter' there are a total 139,700 residentially zoned allotments with development potential, as shown in Table 2, with a regional breakdown provided in Appendix 5. Of this, only a portion will realistically be developed over time, therefore a discount has been applied. As a result there is an estimated potential supply of 68,200 additional residential allotments which could be developed over the next 15 years to accommodate housing growth.

**Table 2:** General Infill Land Supply, Greater Adelaide Planning Region, June 2020

| | Developable Parcels | Maximum Net Yield | Discounted Yield |
|---|---|---|---|
| CSV <=1.3 | 67,400 | 112,800 | 45,100 |
| CSV >1.3 >=1.8 | 72,300 | 115,500 | 23,100 |
| **TOTAL** | **139,700** | **228,300** | **68,200** |

3 A sub-regional breakdown of the total number is provided in Appendix 4.

4 Capital to Site Value (CSV) ratio is a figure which compares the values of a sites assets (i.e. dwelling) with the value of the land

### 4.1.3 Strategic Infill

As of June 2020, strategic infill development within Metropolitan Adelaide had an estimated capacity to accommodate an additional 67,700 residential allotments. This figure is spread across three sub-categories, as identified in Table 3, with a regional breakdown provided in Appendix 6.

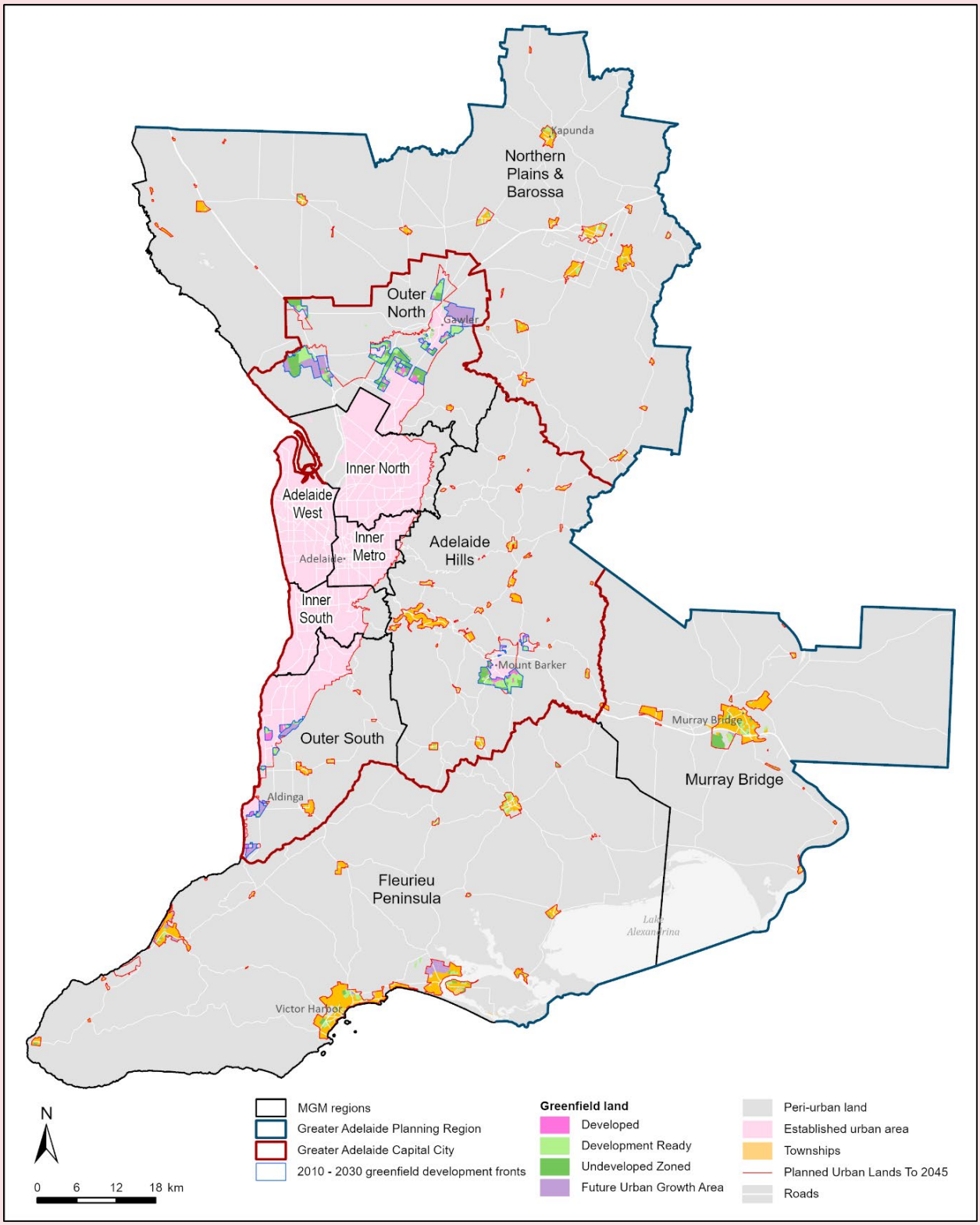
**Table 3:** Strategic Infill Land Supply

| TYPE OF STRATEGIC INFILL | ESTIMATED SUPPLY |
|---|---|
| Strategic Sites | 41,900 |
| Urban Corridor Zones | 15,800* |
| Capital City Zone | 10,000* |
| **TOTAL** | **67,700** |

*Estimated totals

It is important to note that strategic infill sites are capable of accommodating a larger number of allotments should market demand drive it. This is particularly the case within the Urban Corridor and the Capital City zones.

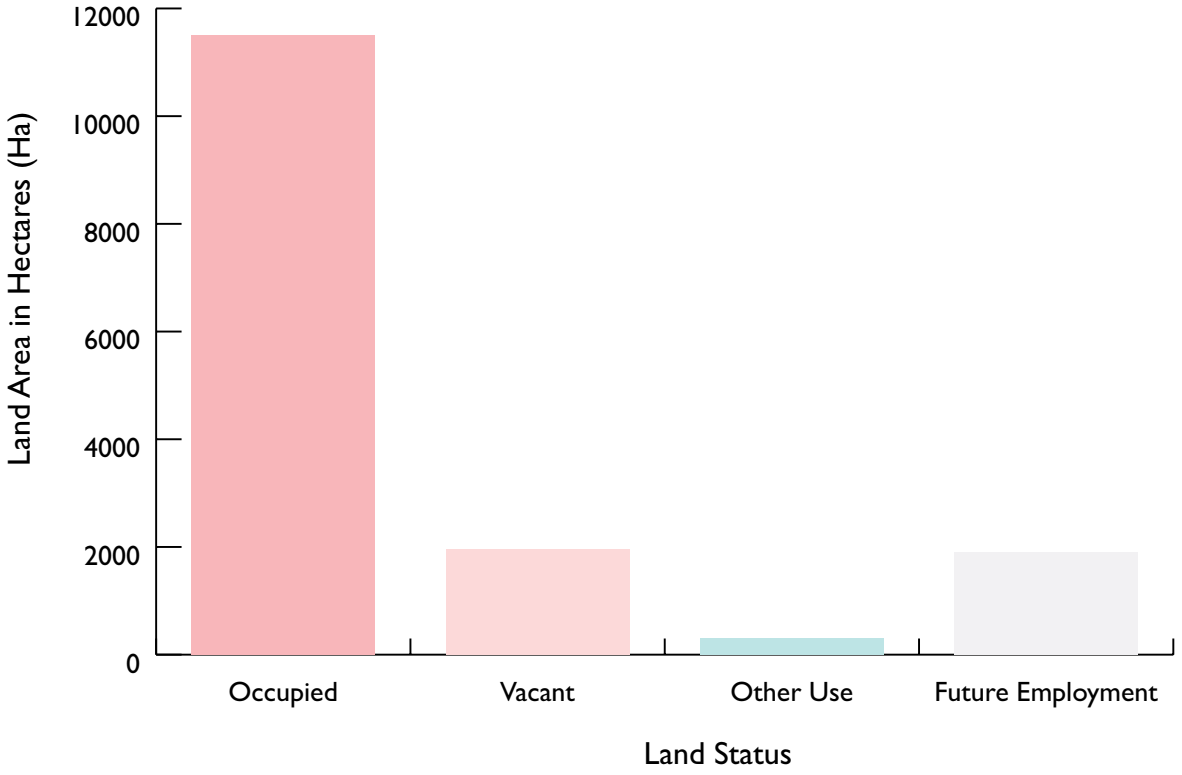
**Figure 5:** Residential Land Supply, Greater Adelaide Planning Region, June 2020



## 4.2 Employment Land Supply

As of June 2020, the Greater Adelaide Planning Region (GAPR) accommodated a total 15,500 hectares of zoned (or identified) employment land, as illustrated in Figure 7. Of this, a total 1,900 hectares of land remained vacant, and a further 1,800 hectares was identified as being available for future employment (industrial) use[5], as illustrated in Figure 6 in addition to a regional overview which is provided in Appendix 7.

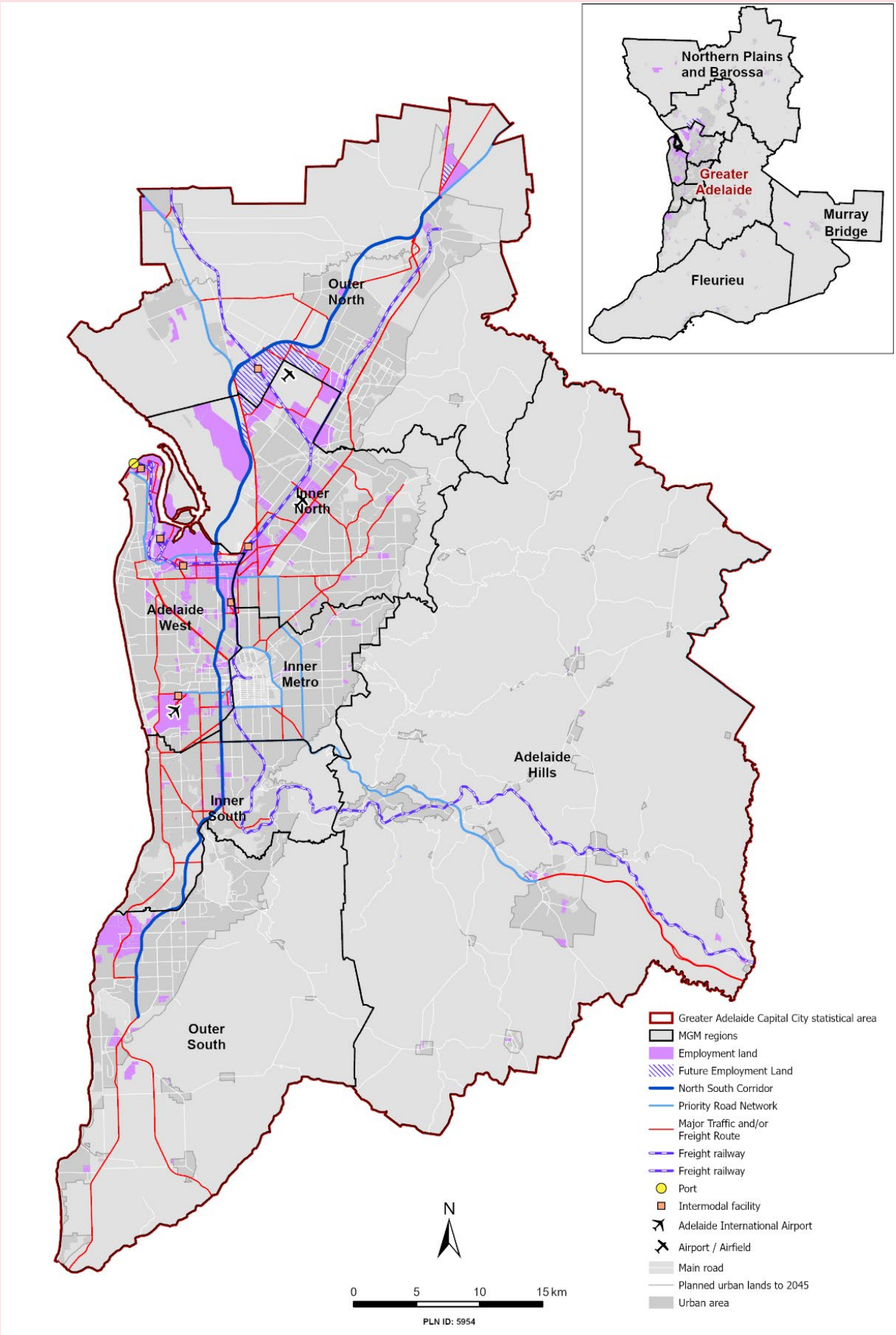
**Figure 6:** Employment Land Supply Status, June 2020




It is important to note that vacant land for the purpose of this report does not include vacant buildings or underutilised sites.

5 Identified within the 30 Year Plan for Greater Adelaide – 2017 Update

**Figure 7:** Employment Land Supply, Greater Adelaide Planning Region, June 2020



# 5.0 PROJECTED POPULATION GROWTH, 2021-2036

Population Projections for South Australia and Regions, 2016-2041[6] (population projections) were published by the Department of Planning, Transport and Infrastructure (DPTI) in May 2019. These projections are based on data obtained from the 2016 ABS Census of population and housing[7], and assumptions about the growth components (overseas migration, interstate migration and natural increase). This information was then used to project a low, medium and high growth scenario for the State and its regions to 2041.

Under a medium growth scenario, as shown in Table 4, the GAPR is estimated to accommodate an additional 197,500 persons, at an average annual increase of 13,200 persons. Under a high growth scenario it is projected 295,000 additional persons will need to be accommodated within the region.

**Table 4:** Projected Population for GAPR, 2021-2036[8]

| GROWTH SCENARIO | TOTAL INCREASE 2021 - 2036 | AVERAGE ANNUAL INCREASE |
|---|---|---|
| Medium | 197,500 | 13,200 |
| High | 295,000 | 19,700 |

# 6.0 ESTIMATED DEMAND, 2021-2036

This section identifies estimated requirement for both residential and employment land over the next 15 years under both a medium and high population growth scenario. This will be used to align with identified supply to determine whether there is adequate provision of land to accommodate housing and employment growth over the long term, being at least 15 years.

## 6.1 Estimated Dwelling Requirement, 2021-2036

The estimated dwelling requirement is calculated by dividing the projected population for a region by the average household size[9], as illustrated in Figure 8.

**Figure 8:** Estimated dwelling requirement methodology

6 https://dpti.sa.gov.au/__data/assets/pdf_file/0008/563813/Population_Projections_for_South_Australia_and_Regions_2016-41_-_May_2019.pdf

7 Detailed methodology outlined within the *Population Projections for South Australia and Regions 2016-2041*, May 2019

8 Population projections at a regional level are provide in Appendix 2 of this report.

9 Average household size is calculated using the 2016 ABS Census data for each region.

Applying this method it is estimated between 94,500 (medium) dwellings and 135,000 (high) dwellings will be required to support growth over the next 15 years, as shown in Table 5 and further detailed in Appendix 3 of this report.

**Table 5:** Estimated Dwelling Requirement for GAPR, 2021-2036

| GROWTH SCENARIO | PROJECTED DWELLING REQUIREMENT 2021-36 | AVERAGE ANNUAL INCREASE |
|---|---|---|
| Medium | 94,500 | 6,300 |
| High | 135,000 | 9,000 |

### 6.2 Estimated Requirement for Vacant Employment Land, 2021-2036

The requirement for vacant employment land over the next 15 years has been calculated by using the historical consumption rates identified in Section 4.0, noting there is both a pre and post GFC figure. Using this method, it is estimated the requirement for vacant employment land will range between 950ha (medium) and 1,650ha (high), as shown in Table 6.

**Table 6:** Estimated Requirement for Vacant Employment Land in GAPR, 2021-2036

| GROWTH SCENARIO | METHOD OF CALCULATION | ESTIMATED REQUIREMENT |
|---|---|---|
| Medium | 10 year consumption rate recorded between 2008 and 2018 (630ha); PLUS<br>Half the 10 year consumption rate (315ha) | **945ha** |
| High | The pre-GFC (2002-2008) consumption rate (110ha per annum) projected over 15 years. | **1,650ha** |

## 7.0 SUPPLY AND DEMAND SUMMARY

This section of the report seeks to compare the identified land supply with projected demand. This will determine whether there is adequate provision of land to accommodate housing and employment growth over the longer term, being at least 15 years.

### 7.1 Residential Land Supply Summary

As identified in Section 4.1 of this report, it is estimated that land contained within the GAPR has an estimated potential to provide an additional 265,000 allotments. As illustrated in Table 7, this supply would adequately meet the estimated dwelling demand over the next 15 years for both a medium and high growth scenario.

**Table 7:** Residential Land Demand vs Supply, 2021-2036 (15 year supply)

| | LAND SUPPLY | ESTIMATED DWELLING REQUIREMENT 2021-2036 | DEMAND & SUPPLY ALIGNMENT |
|---|---|---|---|
| Medium Growth | 265,000 | 94,500 | 15+ years |
| High Growth | 265,000 | 135,000 | 15+ years |

### 7.2 Employment Land Supply Summary

As identified in Section 4.2 of this report, as of June 2020 there was an estimated 1,900 hectares of zoned vacant employment land and 1,800 hectares of identified future employment land within the GAPR. As illustrated in Table 8, this supply would adequately meet the estimated demand for employment land over the next 15 years for both a medium and high growth scenario.

**Table 8:** Employment Land Demand vs Supply, 2021-2036 (15 year supply)

| | ZONED LAND SUPPLY (June 2020) | FUTURE LAND SUPPLY (June 2020) | VACANT LAND REQUIREMENT 2021-2036 | DEMAND & SUPPLY ALIGNMENT |
|---|---|---|---|---|
| Medium Growth | 1,900 ha | 1,800 ha | 950 ha | 15+ years |
| High Growth | 1,900 ha | 1,800 ha | 1,400 ha | 15+ years |

## 8.0 CONCLUSION

In conclusion, the Act requires that adequate provision be made within the Greater Adelaide Planning Region to accommodate both housing and employment growth for a period of at least 15 years.

This report demonstrates that based on identified land supply, projected population growth and estimated land requirements, there is an adequate provision of land to accommodate housing and employment growth over the next 15 years.

**Appendix 1:** Environment and Food Production Areas, GRO Plan 17/2015

**Appendix 2:** Population Projections by Region, 2021-2036

| REGION | MEDIUM | HIGH |
|---|---|---|
| Outer North | 40,500 | 58,200 |
| Inner North | 36,300 | 45,600 |
| Adelaide West | 34,100 | 53,200 |
| Inner Metro | 25,200 | 46,400 |
| Inner South | 15,800 | 24,100 |
| Outer South | 17,900 | 26,300 |
| Adelaide Hills | 9,700 | 13,100 |
| GREATER ADELAIDE CAPITAL CITY (GACC) | 179,500 | 266,900 |
| Fleurieu Peninsula | 10,400 | 13,500 |
| Murray Bridge | 3,100 | 5,700 |
| Northern Plains & Barossa | 4,500 | 8,500 |
| PERI-URBAN AREA | 18,000 | 27,700 |
| TOTAL | 197,500 | 294,600 |

**Appendix 3:** Estimated Dwelling Requirement by Region, 2021-2036

| REGION | MEDIUM | HIGH |
|---|---|---|
| Outer North | 18,300 | 25,300 |
| Inner North | 17,100 | 20,600 |
| Adelaide West | 16,700 | 24,500 |
| Inner Metro | 12,400 | 22,000 |
| Inner South | 7,100 | 10,500 |
| Outer South | 8,600 | 11,900 |
| Adelaide Hills | 4,600 | 6,200 |
| GREATER ADELAIDE CAPITAL CITY (GACC) | 84,800 | 121,000 |
| Fleurieu Peninsula | 6,200 | 7,800 |
| Murray Bridge | 1,500 | 2,600 |
| Northern Plains & Barossa | 1,800 | 3,500 |
| PERI-URBAN AREA | 9,500 | 13,900 |
| TOTAL | 94,300 | 134,900 |

**Appendix 4:** Greenfield and Township Land Supply by Region, June 2020

| REGION | DEVELOPMENT READY | UNDEVELOPED ZONED | FUTURE URBAN GROWTH | TOTAL | VACANT LOTS (June 2020) |
|---|---|---|---|---|---|
| Outer North | 12,400 | 33,900 * | 20,100 * | 66,400 * | 1,300 |
| Outer South | 1,800 | 2,400 * | 4,900 * | 9,100 * | 600 |
| Adelaide Hills | 4,400 | 8,600 * | 400 * | 13,400 * | 1,200 |
| Fleurieu | 2,100 | 5,400 * | 13,800 * | 21,300 * | 2,400 |
| Murray Bridge | 500 | 5,800 * | 4,400 * | 10,700 * | 400 |
| Northern Plains & Barossa | 1,200 | 3,500 * | 400 * | 5,100 * | 1,000 |
| TOTAL | 22,400 | 59,600 * | 44,000 * | 126,000* | 6,900 |

**Appendix 5:** General Infill Land Supply by Region, June 2020

| REGION | DEVELOPABLE PARCELS | THEORETICAL MAXIMUM YIELD | REALISTIC (DISCOUNTED) POTENTIAL [10] |
|---|---|---|---|
| Outer North | 12,520 | 26,980 | 4,434 |
| CSV <=1.3 | 837 | 2,836 | 1,134 |
| CSV >1.3 <=1.8 | 7,687 | 16,504 | 3,300 |
| CSV >1.8 | 3,996 | 7,640 | - |
| Inner North | 51,870 | 97,835 | 28,285 |
| CSV <=1.3 | 24,873 | 50,903 | 20,361 |
| CSV >1.3 <=1.8 | 22,858 | 39,621 | 7,924 |
| CSV >1.8 | 4,139 | 7,311 | - |
| Outer South | 38,190 | 61,998 | 9,563 |
| CSV <=1.3 | 2,756 | 6,212 | 2,485 |
| CSV >1.3 <=1.8 | 21,999 | 35,389 | 7,078 |
| CSV >1.8 | 13,435 | 20,397 | - |
| Inner South | 17,220 | 22,652 | 5,683 |
| CSV <=1.3 | 7,721 | 10,840 | 4,336 |
| CSV >1.3 <=1.8 | 5,869 | 6,734 | 1,347 |
| CSV >1.8 | 3,630 | 5,078 | - |
| Inner Metro | 19,058 | 26,226 | 8,798 |
| CSV <=1.3 | 13,169 | 18,958 | 7,583 |
| CSV >1.3 <=1.8 | 4,872 | 6,075 | 1,215 |
| CSV >1.8 | 1,017 | 1,193 | - |
| Adelaide West | 28,041 | 34,220 | 11,100 |
| CSV <=1.3 | 17,998 | 22,862 | 9,145 |
| CSV >1.3 <=1.8 | 8,507 | 9,775 | 1,955 |
| CSV >1.8 | 1,536 | 1,583 | - |
| Adelaide Hills | 1,725 | 3,964 | 359 |
| CSV <=1.3 | 12 | 198 | 79 |
| CSV >1.3 <=1.8 | 529 | 1,401 | 280 |
| CSV >1.8 | 1,184 | 2,365 | - |
| TOTAL | 168,624 | 273,875 | 68,222 |

10 For parcels with a CSV Ratio of <=1.3 the maximum theoretical net dwelling yield has been discounted by 60%, this resultant figure has then been included as the 'realistic' supply. A discount of 80% has been applied to the maximum theoretical yield from parcels with a CSV Ratio of >1.3 to <=1.8. Land parcels with a CSV Ratio greater than 1.8 have not been counted towards the realistic potential. This is based on analysis contained within the LSR which indicates these allotments are unlikely to be developed in the short to medium term.

**Appendix 6:** Strategic Infill Land Supply by Region, June 2020

| REGION | TOTAL |
|---|---|
| Inner North | 12,400 |
| Outer South | 2,100 |
| Inner South | 4,700 |
| Inner Metro | 28,200 |
| Adelaide West | 20,000 |
| Adelaide Hills | 300 |
| TOTAL | 67,700 |

**Appendix 7:** Employment Land Supply by Region, June 2020

| REGION | VACANT | OCCUPIED | OTHER USE | FUTURE | TOTAL |
|---|---|---|---|---|---|
| Outer North | 151 | 1,238 | 170 | 1,732 | 3,291 |
| Inner North | 486 | 3,105 | 0 | 90 | 3,681 |
| Outer South | 331 | 808 | 0 | 0 | 1,139 |
| Inner South | 8 | 242 | 0 | 0 | 250 |
| Adelaide West | 797 | 3,441 | 203 | 0 | 4,441 |
| Inner Metro | 4 | 112 | 0 | 0 | 116 |
| Adelaide Hills | 21 | 179 | 0 | 0 | 200 |
| Fleurieu | 25 | 362 | 0 | 0 | 324 |
| Northern Plains & Barossa | 37 | 1,333 | 0 | 0 | 1,370 |
| Murray Bridge | 73 | 591 | 0 | 0 | 664 |
| TOTAL | 1,933 | 11,411 | 373 | 1,822 | 15,539 |

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