



Medium and High Density Dwellings in Sydney Suburbs 2010 – 2015



RESIDENTIAL PROPERTY

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With broadhectare land diminishing, Sydney's Metropolitan Strategy is increasingly favouring medium and high density dwellings within established urban areas to accommodate increased demand. With new dwelling construction in Sydney however, recently at 50 year lows, the market is now poised for an upturn with tightening rental vacancy rates and strong rises in rents. What is the outlook for other dwelling construction and prices? How will the recent stamp duty concessions for new dwellings influence activity?

Medium and High Density Dwellings in Sydney Suburbs aims to determine the level of demand for medium and high density dwellings in Sydney and the prospects for development in particular Sydney centres.

As the availability of suitable sites for apartment development in Inner Sydney has become more limited, developer interest has increasingly shifted towards opportunities in Sydney's middle ring and outer suburbs.

Owner occupier and rental demand has been key to this shift. Deteriorating affordability and declining dwelling construction, has pushed apartment demand out to the middle and outer ring suburbs.

The study will consider both medium and high density dwelling types, with medium density defined as semi detached, terraces, and townhouses and high density consisting of flats, units and apartments.

The study will provide individual analysis of the fourteen Sydney Statistical Subdivisions (SSDs):

- Inner Sydney
- St George Sutherland
- Fairfield Liverpool
- Inner Western Sydney
- Outer Western Sydney
- Lower Northern Sydney
- Northern Beaches
- Eastern Suburbs
- Canterbury Bankstown
- Outer South Western Sydney
- Central Western Sydney
- Blacktown
- Central Northern Sydney
- Gosford Wyong

The study will highlight the main centres for unit/apartment development within the SSDs, and also examine factors that will impact on supply including local planning policy, as well as local unit values relative to house values, local rental market conditions, prices, and yields.

Approach

BIS Shrapnel's Medium and High Density Dwellings in Sydney Suburbs implements the same approach that has made the company the acknowledged analysts and forecasters of the various Australian property markets.

■ Understanding the market forces...

Using BIS Shrapnel expertise in property related research, the demand aspects of medium and high density dwelling demand are thoroughly researched and explained.

From a demographic perspective, we will look at the trends in household profile in Sydney across different purchaser segments, as well as changes in the type and tenure of dwelling they are occupying, with a view to determining the implications for the demand for medium and high density dwellings.

From an economic perspective, we will consider relative values, rental growth, yields, and local demand and supply potential. The feasibility of local development at prevailing market values will also be considered as a determinant of supply.

Forecast the market to the year 2015...

Forecasts will be provided into fourteen separate geographic regions generally coinciding with Metropolitan Sydney's defined Statistical Subdivisions. The study will forecast:

- Total Sydney annual underlying demand split into separate houses, medium density, and high density dwellings;
- Annual other dwelling approvals to 2015 by SSD, split into medium and high density dwellings. Commentary will be added on where the main supply points will be within SSDs.
- Average annual unit rental growth by SSD for the 2010 to 2015 period to highlight where the strongest rental growth is expected
- Average annual unit price growth by SSD for the 2010 to 2015 period. This will highlight expected unit price growth within each region relative to the forecast for Sydney overall, and those expected to outperform or underperform the Sydney average.

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Medium and High Density Dwellings
in Sydney Suburbs: 2010 – 2015



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