



Urban Land Development Outlook

Perth metropolitan region and Peel sub-region

2023-24

Acknowledgement of country

The Western Australian Planning Commission acknowledges the Aboriginal people as the traditional custodians of Western Australia. We pay our respects to the Ancestors and Elders, both past and present, and the ongoing connection between people, land, waters and community. We acknowledge those who continue to share knowledge, their traditions and culture to support our journey for reconciliation. In particular, we recognise land and cultural heritage as places that hold great significance for Aboriginal people.

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Perth and Peel Urban Land Development Outlook 2023-24 Report

Introduction

The Urban Land Development Outlook (ULDO) is prepared as a key component of the Department of Planning, Lands and Heritage’s (the Department) Urban Development Program (UDP), which tracks and models land supply on behalf of the Western Australian Planning Commission (WAPC).

Drawing on evidence from a variety of sources including a comprehensive survey of developers and Departmental databases, the ULDO provides an integrated representation of development activity anticipated across the Perth and Peel metropolitan area. Growth is depicted spatially on a series of maps, along with information describing the type of development, staging, and expected dwelling yield of each project.

Data and findings from the ULDO are utilised by infrastructure providers, Government, and investors to inform the timing and delivery of services required to support population growth and liveable communities.

This report summarises findings from the ULDO 2023/24, along with relevant background on land and housing supply across Perth and Peel.

Outputs from the ULDO are accessible on the wa.gov.au website: [Perth and Peel Urban Land Development Outlook \(www.wa.gov.au\)](https://www.wa.gov.au), as an interactive map through PlanWA or as a spatial dataset through Data WA.

Key Points

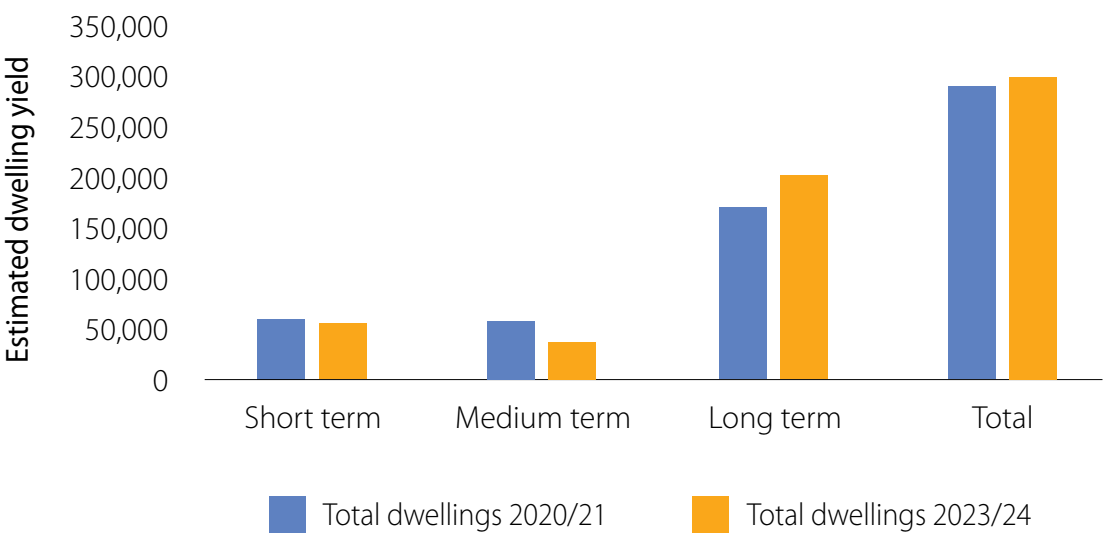
Over the past five years, the land and housing supply pipeline has experienced significant disruptions due to various factors. After a period of unusually low growth, rates of population growth began to increase, before COVID related travel restrictions effectively paused growth through overseas migration.

Population growth has surged since the lifting of travel restrictions. In the year to June 2023, Western Australia’s (WA) population increased by 3.1 per cent, the highest rate in Australia and the largest volume in raw numbers on record.

Demand for housing across Australia was also boosted through increased household savings and a suite of housing stimulus packages. The stock of dwellings being constructed in WA reached record levels and stretched the residential construction sector, extending building timeframes and increasing building costs. These conditions have contributed to a situation where there are now very low volumes of dwellings available to buy or rent across Perth and Peel.

Despite the turbulent operating environment, the total dwelling yield identified through ULDO 2023/24 is comparable with the previous few iterations of ULDO (**Figure 1**), suggesting a reasonably stable volume of supply coming through the land and housing development pipeline.

Figure 1: Total dwellings – yield comparison



Source: Perth and Peel Urban Land Development Outlook 2020/21 and Perth and Peel Urban Land Development Outlook 2023/24

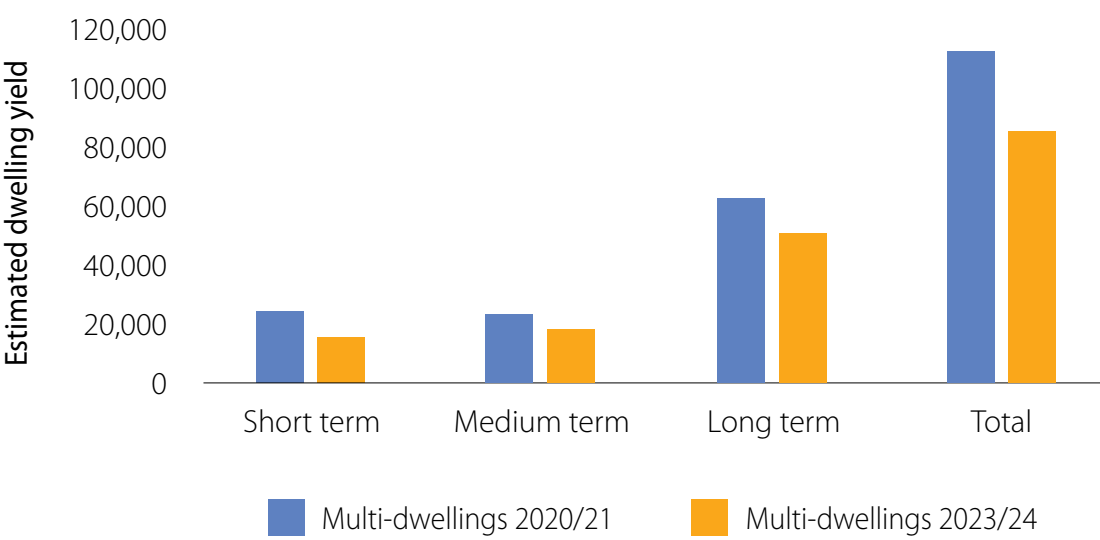
The challenges faced by the residential construction sector have slowed the delivery of housing across the metropolitan area and have created particularly challenging conditions for high-density construction. One of the notable differences in the ULDO 2023/24 is the reduced number of multi-unit projects being proposed, particularly in the short term (**Figure 2**).

Similar to previous ULDO publications, much larger yields were identified in the long-term staging cohort of the analysis (**Figure 3**). In addition to the large dwelling yields identified in the long-term, future supply will be augmented as planning progresses for undeveloped urban deferred zoned land, as well as urban expansion and investigation areas.

The volumes of short-term yields, and to a lesser extent, medium-term yields are more closely informed by developer assumptions about housing demand over those timeframes. A key factor contributing to this dynamic is the upfront cost that developers must bear when bringing lots or units to the market.

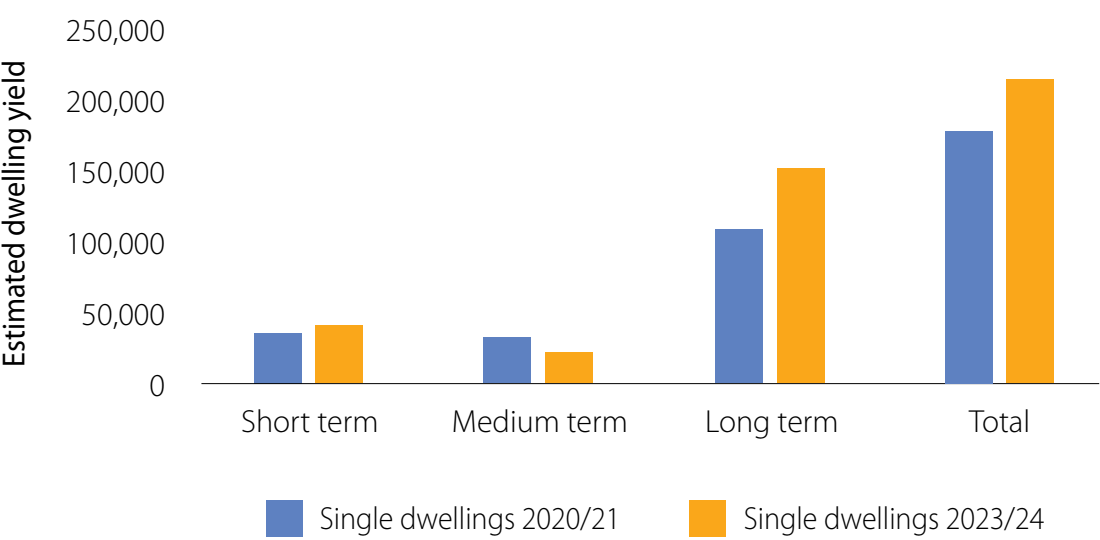
High costs at the outset of projects, without reasonable certainty over potential timeframes for return, increases project risk, which has implications for feasibility and access to finance. Finance and market conditions was the most common constraint to development identified through the Developers’ Intentions Survey which informs the ULDO.

Figure 2: Multi-dwellings – yield comparison



Source: Perth and Peel Urban Land Development Outlook 2020/21 and Perth and Peel Urban Land Development Outlook 2023/24

Figure 3: Single dwellings – yield comparison



Source: Perth and Peel Urban Land Development Outlook 2020/21 and Perth and Peel Urban Land Development Outlook 2023/24

Table 1: Projected dwelling yields by sub-region

SUB-REGION	SHORT TERM 2023/24 to 2027/28			MEDIUM TERM 2028/29 to 2032/33			LONG TERM 2033/34+			Total Dwellings
	Single dwellings	Multi dwellings	Total Dwellings	Single dwellings	Multi dwellings	Total Dwellings	Single dwellings	Multi dwellings	Total Dwellings	
North-West	9,673	2,020	11,791	5,895	2,899	8,954	107,867	9,169	117,036	137,781
North-East	4,926	975	5,901	2,414	776	3,190	8,824	10,556	19,380	28,471
Central - Middle	412	1,815	2,481	408	4,968	5,827	0	16,600	16,600	24,908
Central - Inner	292	7,026	7,318	115	5,792	5,918	0	7,596	7,596	20,832
South-East	8,238	675	9,382	5,203	729	5,932	18,665	35	18,700	34,014
South-West	10,052	3,339	13,685	4,980	2,410	7,632	9,331	6,776	16,107	37,424
Peel	4,448	436	4,911	3,289	678	3,967	7,677	738	8,415	17,293
Grand total	38,041	16,286	55,469	22,304	18,252	41,420	152,364	51,470	203,834	300,723

Source: Perth and Peel Urban Land Development Outlook 2023/24

Note: Excludes 'Other dwelling' yields

Table 1 presents the projected dwelling yield by sub-region identified in the ULDO 2023/24.

The North-West sub-region holds the largest stock of land identified for future residential development. It is worth noting, however, that due to the planning in place and development momentum through the sub-region, the vast majority of growth areas identified in *Perth and Peel@3.5million* for the North-West sub-region are included as projects in ULDO 2023/24.

Other outer sub-regions, while exhibiting much lower long-term dwelling yields, have substantial growth areas identified that are not included as projects in ULDO 2023/24, but will likely be added in future reports, subject to the requisite planning.

As the Urban Land Development Outlook (ULDO) research picks up projects expected to yield five dwellings or more, much of the dwelling yield for infill areas, including the Central sub-region, is not captured due to the small scale of many individual projects. Consequently, the projected yields identified in the Central sub-region were lower than usual, as developers work through the uncertainties associated with high-density development. It is anticipated that, as Government works with industry to mitigate these uncertainties and the sector returns to a state closer to equilibrium, more high-density projects will emerge.

Some of the major infill projects being delivered include:

- Burswood point
- Perth City Link
- Canning City Centre
- Bentley 360
- Murdoch Mixed use precinct

Urban Development Program

The Urban Development Program (UDP) is prepared by the Department on behalf of the Western Australian Planning Commission (WAPC). The preparation is done to fulfil the WAPC’s functions, as outlined in Section 14 of the *Planning and Development Act 2005*. The UDP’s purpose is to provide a robust and transparent evidence-base for decision-making. This decision making pertains to policy, land use planning, land development and infrastructure planning and coordination.

The construction of this evidence base involves an ongoing program of monitoring, analysis and reporting. The UDP tracks all stages of the land and housing supply continuum, from rezoning to structure planning, subdivision, and construction. The aim is to identify where delivery is not aligned with anticipated demand.

The major monitoring programs of the UDP include the Perth and Peel Urban Land Development Outlook, Regional Land Supply Assessments, the Urban Growth Monitor, Economic and Employment Land Monitor and State Lot Activity.

Land and Housing Supply Context

The Urban Land Development Outlook (ULDO) offers a preview of future development patterns across Perth and Peel.

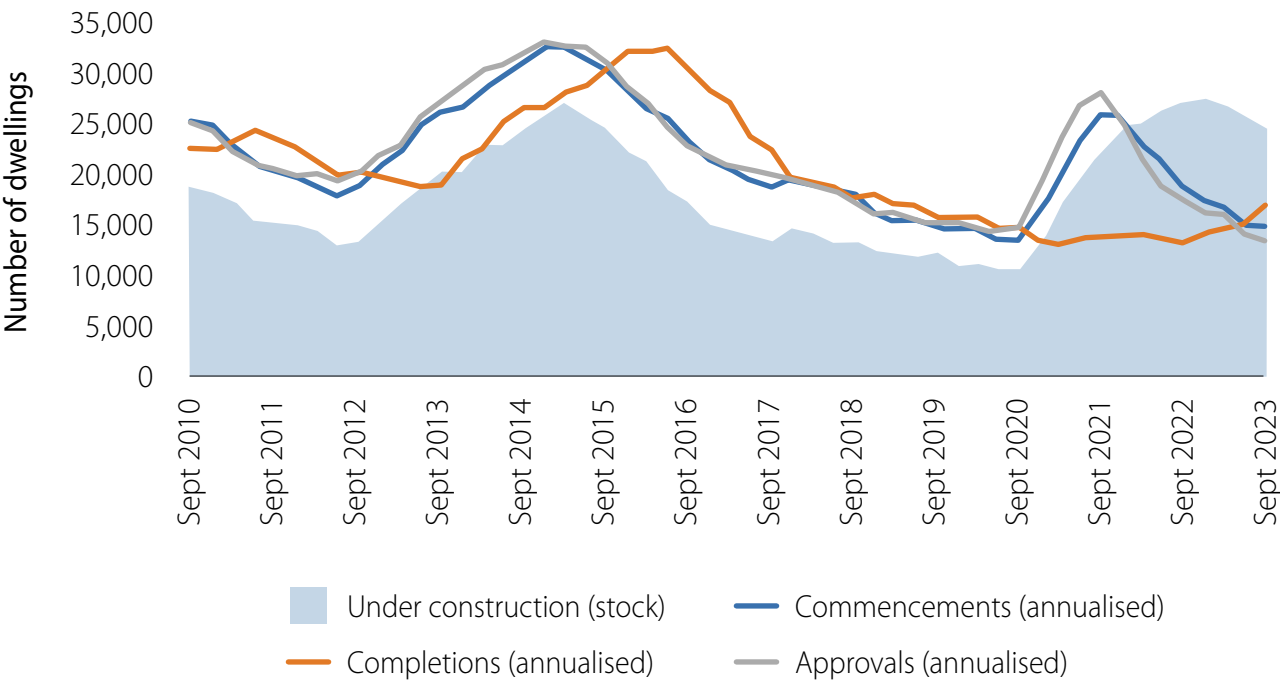
A sharp increase in dwelling approvals and commencements in 2020-21 increased demand for construction services across Western Australia (**Figure 4**). Due to labour supply constraints and supply chain issues, however, there has not yet been a commensurate increase in completions, which has had implications for building timeframes and costs.

Figure 5 shows the decreasing share of attached dwellings as a proportion of total dwelling approvals, which reached 11.6 per cent for 2023. A lower share of attached dwelling approvals is likely to negatively affect infill rates over the coming few years.

The ULDO identifies residential projects expected to yield five or more dwellings. Projects yielding fewer than five dwellings, while small individually, collectively create significant demand for infrastructure and services. In this context, the ULDO represents a sub-set of future land and housing supply.

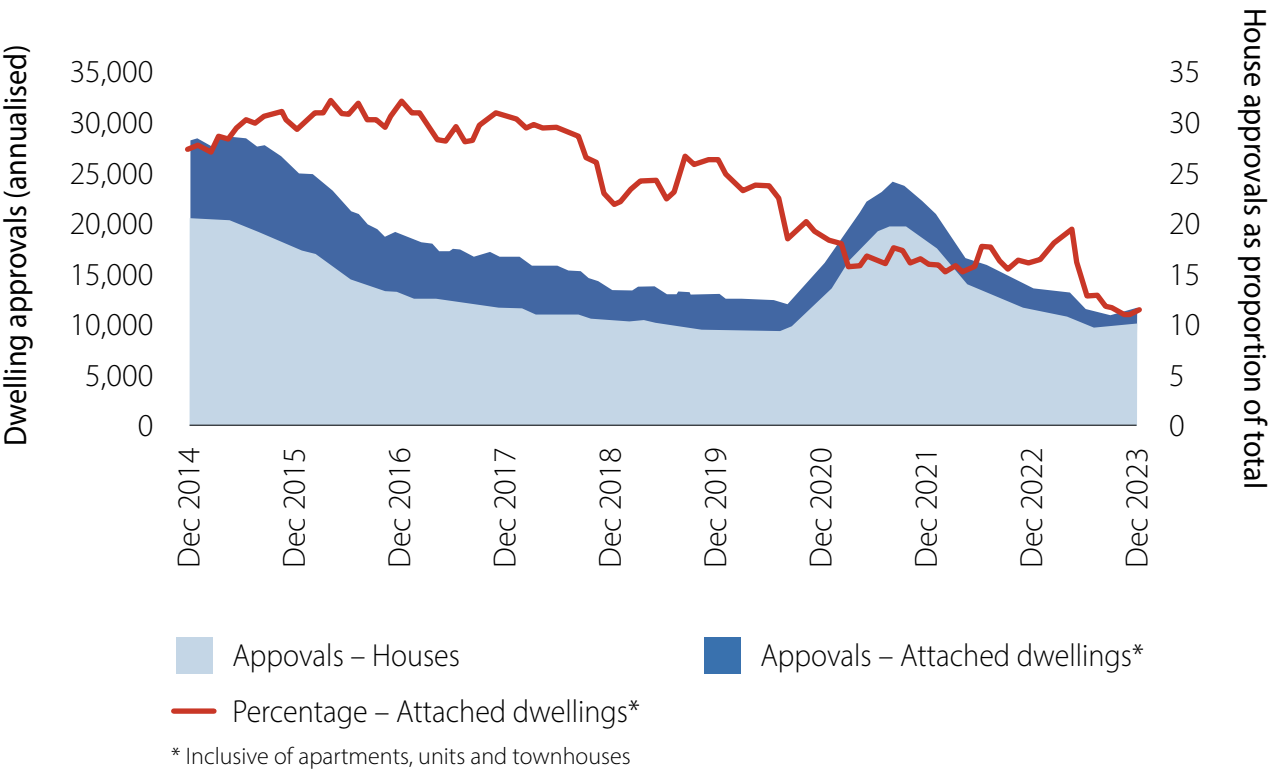
The impact of small-scale development (not identified in ULDO) is particularly pronounced in infill areas. Typically infill development constitutes between 30 and 40 per cent of the net increase in dwelling stock across Perth and Peel in any given year.

Figure 4: Construction Activity - Western Australia



Source: Australian Bureau of Statistics

Figure 5: Dwelling approvals - Greater Perth



Source: Australian Bureau of Statistics

Data from the Department’s Urban Growth Monitor shows that roughly two thirds of infill projects since 2011 have involved projects yielding five dwellings or fewer. The share of background infill projects delivered in 2022 (latest data available) was significantly higher than the average (Figure 6).

The challenges associated with delivering high-density projects in the current climate are reflected in the diminished share of large-scale infill projects delivered in 2022. They also mean that fewer projects of this nature were being proposed at the time ULDO 2023/24 was being prepared. However, it is anticipated that conditions will be more favourable for this type of development in the future and greater numbers of higher density projects will progress.

In this context, major infill projects likely to be delivered in the medium and long-term are also underrepresented, as many projects of this nature will not yet have been initiated. The Government is currently collaborating with the industry to incentivise medium and high-density developments in suitable areas.

Project yields in ULDO are not static and individual projects may have different characteristics from one iteration to the next, as alternative development proposals are lodged for approval. Notably, several sites identified as high-density residential projects in the previous ULDO are included in this edition with lower dwelling yields or alternative uses.

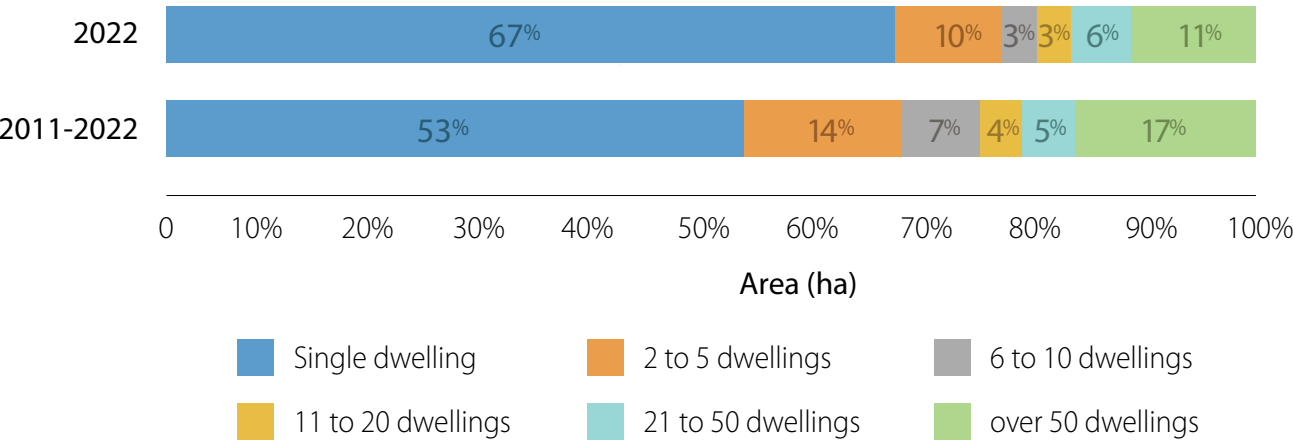
Once all the lots in an ULDO project have been created, the project is removed from the database, as servicing requirements are assumed to be completed. This arrangement means many new dwellings will be constructed on vacant lots located in former ULDO sites which are not captured in the current dataset.

Sub-regional Profiles – residential

North-West sub-region

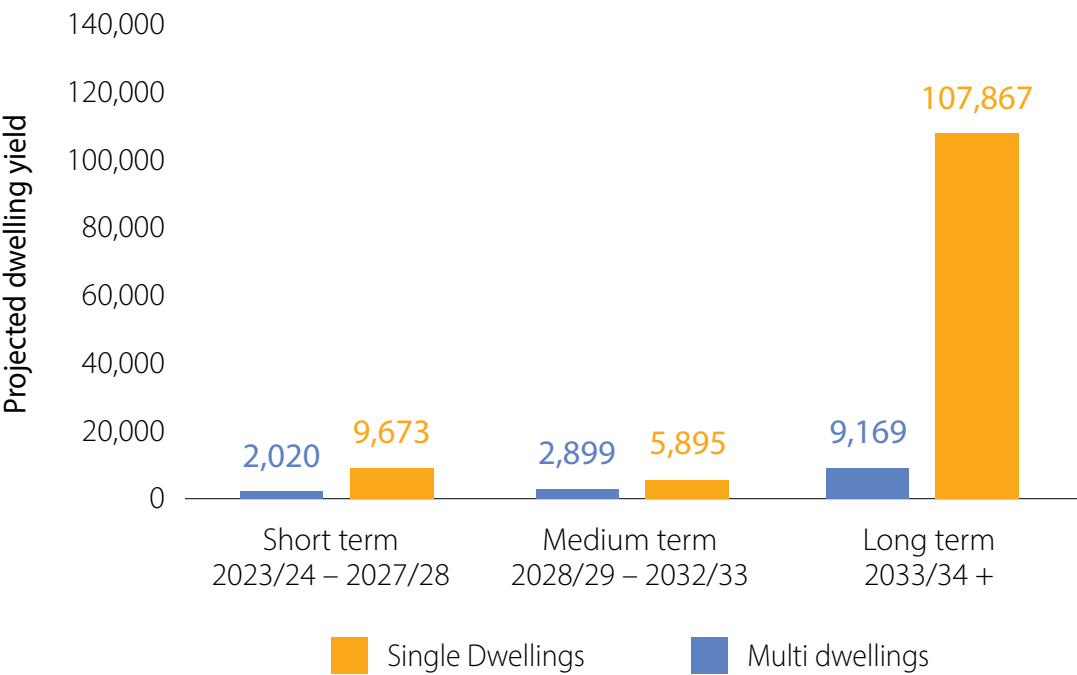
- The North-West sub-region contains the largest projected dwelling yield, based on ULDO projects of any sub-region by a considerable margin (Figure 7).
- The sub-region has some of the highest yields identified in the short and medium terms, however, the long-term development potential is much larger and represents approximately 40 per cent of the entire yield estimate for Perth and Peel.
- The City of Wanneroo is one of Perth’s fastest growing areas, with large scale land developments, both inland and along the coast. This trend is likely to continue with very large volumes of future development identified in the local government area. The City accounts for 98 per cent of the projected dwelling yield for the North-West sub-region.
- The East Wanneroo District Structure Plan area has added large volumes of land for future urban development to the corridor. It is estimated that approximately 50,000 new dwellings and 20,000 jobs will be created upon the development of the area.
- The District Structure Plan covers 8,300 hectares of land and will require local structure planning to coordinate servicing and subdivision.

Figure 6: Number of infill dwellings per lot, 2022 and 2011 to 2022



Source: WAPC, Urban Growth Monitor 15

Figure 7: Projected dwelling yield – North-West sub-region



Source: Perth and Peel Urban Land Development Outlook 2023/24

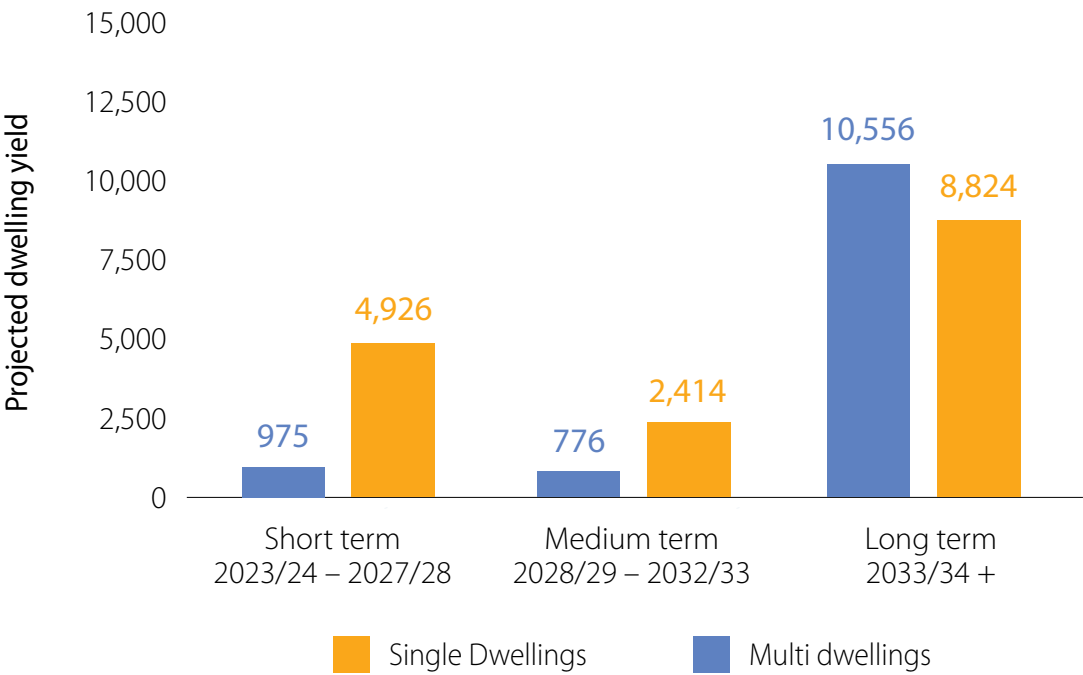
North-East sub-region

- The North-East sub-region has experienced solid growth over the past decade, largely due to the popularity of housing estates in the Ellenbrook area.
- Most of the short to medium term development potential identified in the North-East sub-region is close to the Morley-Ellenbrook rail extension alignment.
- Substantial development potential is also identified further north, with a yield of 4,500 dwellings identified in the Bullsbrook area.
- A large volume of multi-unit development potential is identified in central Midland in the long-term.
- In addition to the sites identified through the ULDO, urban expansion and investigation areas in north Ellenbrook and Bullsbrook will provide a significant increase in development capacity as other projects draw nearer completion.

Central sub-region

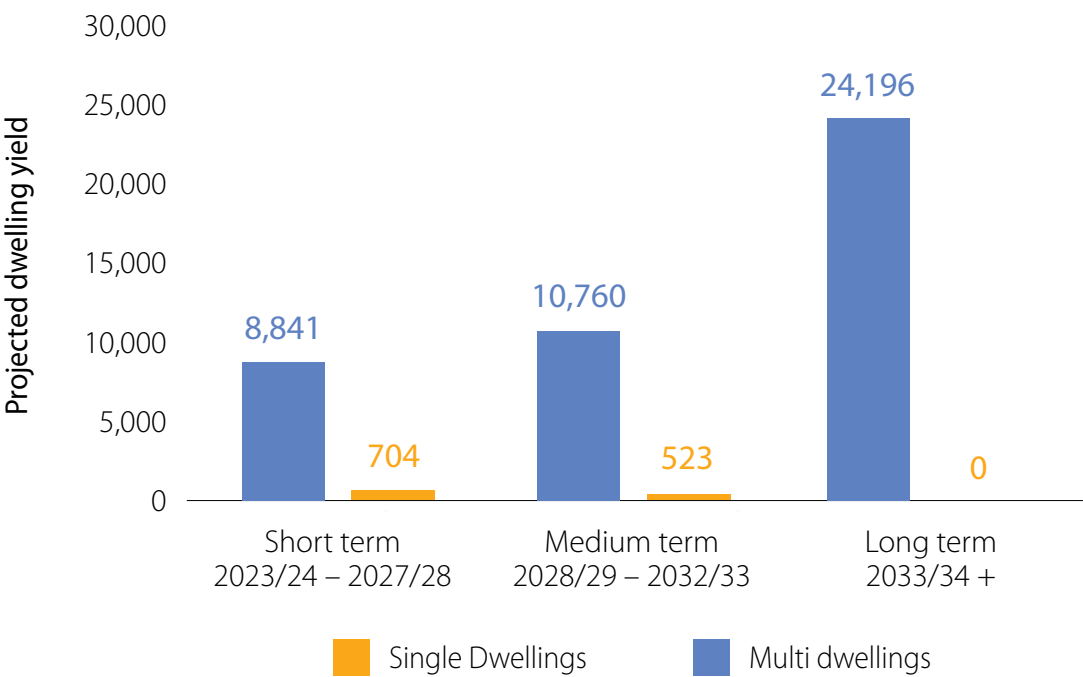
- The Central sub-region is the most populous and densely developed area of the Perth metropolitan region.
- As urban land is nearly fully developed, the Central sub-region is effectively dependent on urban consolidation to accommodate further growth.
- The proposed developments identified in ULDO 2023/24 represent a relatively small subset of future dwelling supply in the sub-region, as background infill or small-scale (five or fewer dwellings) developments are a significant contributor of dwellings in the Central sub-region.
- The development of Burswood Point in the Town of Victoria Park proposes a mixed-use development with 4,500 dwellings with 26,000m² of commercial floorspace.
- The redevelopment of the former television station sites of Channels 9 and 10 in Dianella in the City of Stirling, with 259 single dwellings being proposed, is another key brownfield project in the Central sub-region.

Figure 8: Projected dwelling yield – North-East sub-region



Source: Perth and Peel Urban Land Development Outlook 2023/24

Figure 9: Projected dwelling yield – Central sub-region



Source: Perth and Peel Urban Land Development Outlook 2023/24

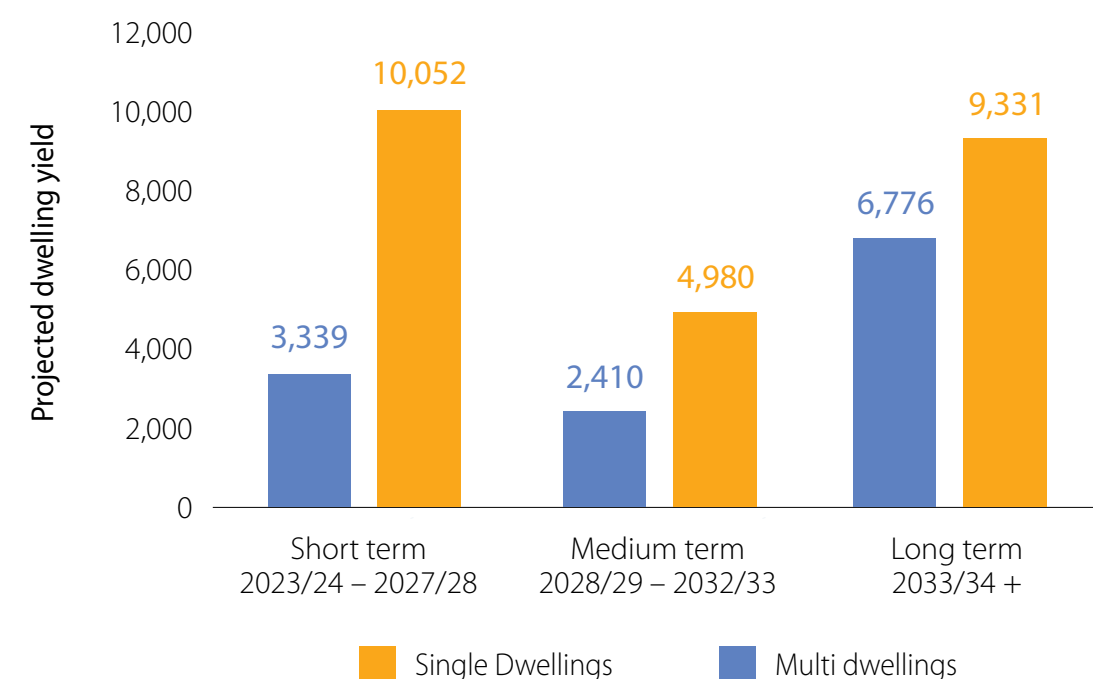
South-West sub-region

- The South-West sub-region has experienced some of the highest population growth in the metropolitan area over the past decade, with large land releases and improved transport linkages supporting this growth.
- The trend appears likely to continue with the sub-region recording the highest projected single dwelling yield in the short-term and the highest short-term multi-dwelling yield outside the Central sub-region.
- The development of Karnup in the City of Rockingham proposes the largest residential development in the South-West sub-region, with 3,200 proposed single dwellings.
- Further development of the Cockburn Central Town Centre proposes 1,880 single dwellings, with additional mixed-use developments currently under consideration.

South-East sub-region

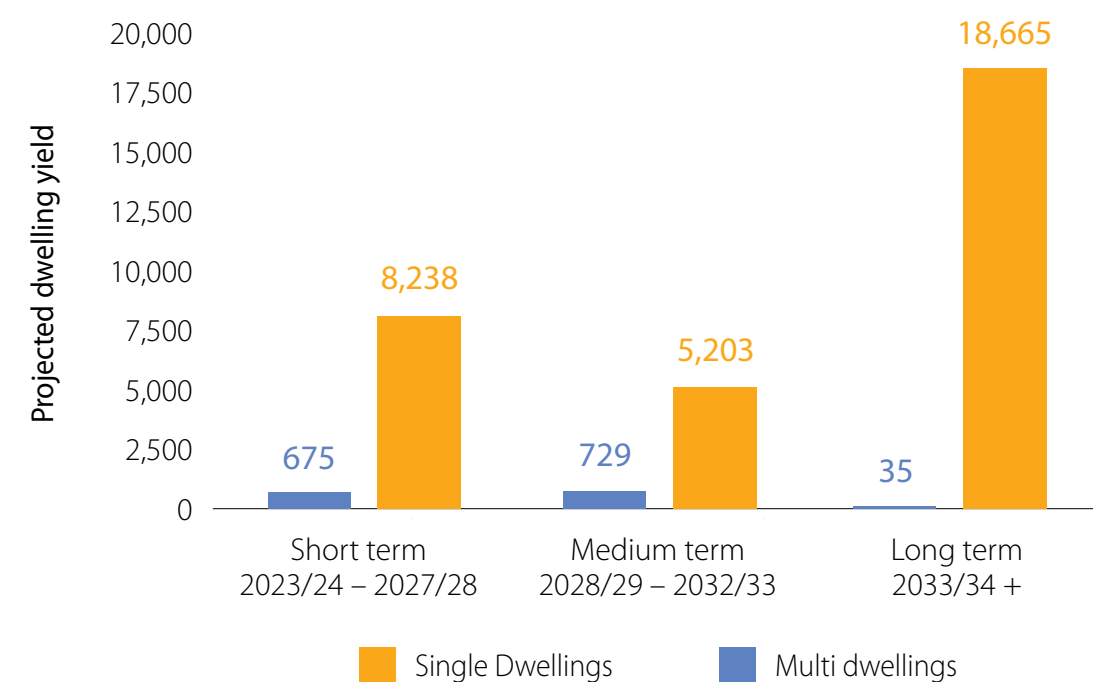
- The South-East sub-region contains the highest proportion of single dwellings identified in the ULDO 2023/24.
- Over 11,000 new dwellings are being proposed within the City of Armadale in ULDO 2023/24.
- The upgrading of the Armadale passenger rail line is expected to spearhead further development projects in the region.
- The development of Whitby Town Centre is a key contributor of supply within the South-East sub-region, with 4,000 single dwellings proposed for development.
- Residential developments in Southern River, Mundijong, Hilbert and Gosnells propose over 12,500 single dwellings combined in these areas.

Figure 10: Projected dwelling yield - South-West sub-region



Source: Perth and Peel Urban Land Development Outlook 2023/24

Figure 11: Projected dwelling yield - South-East sub-region



Source: Perth and Peel Urban Land Development Outlook 2023/24

Peel region

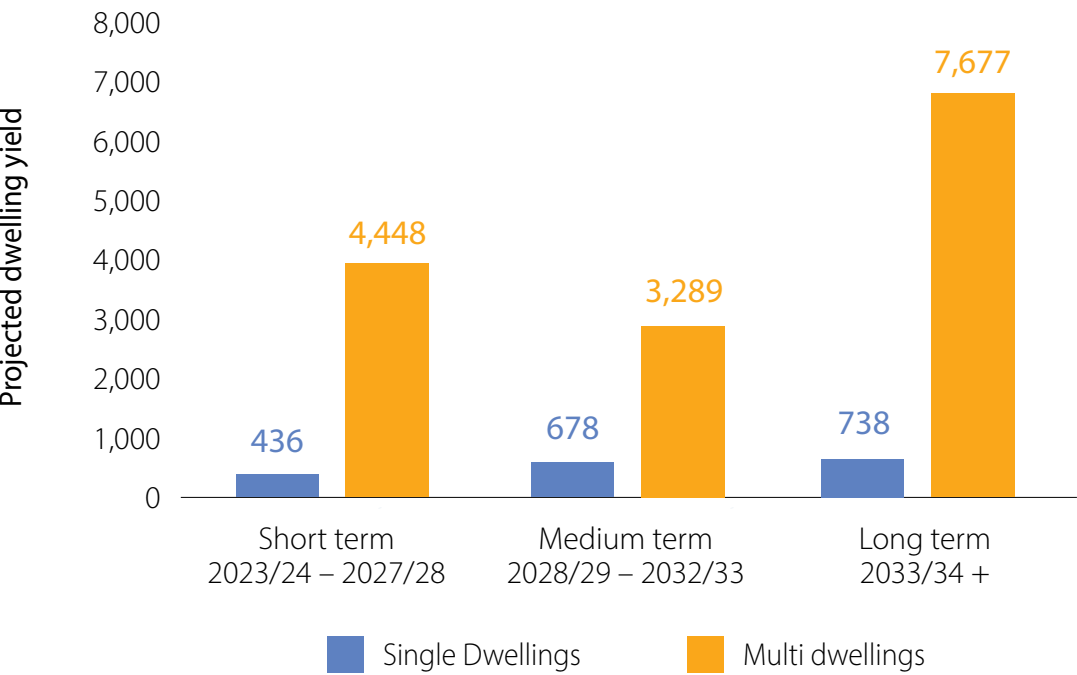
- The Peel region has the highest level of employment self-sufficiency outside the Central sub-region.
- It also experiences the lowest annual change in dwelling stock and has the lowest estimated dwelling yield.
- Due to the peri-urban nature, a variety of different types of developments including urban, rural, and industrial projects have been identified in ULDO 2023/24.
- Major projects in the Peel region include:
 - The Murray River Country Estate development in Pinjarra in the Shire of Murray proposes 2,671 single dwellings.
 - Further development of Austin Lakes in South Yunderup proposes 2,156 additional residential dwellings in the Shire of Murray.
 - The Ocean Hill development in Lakelands, in the City of Mandurah proposes 1,549 single residential dwellings.
- In addition to the development areas identified in the ULDO, large volumes of urban expansion and urban investigation areas are identified in Peel through *Perth and Peel@ 3.5million*, which will support growth well into the long term.

Economic and Employment land projects

Industrial

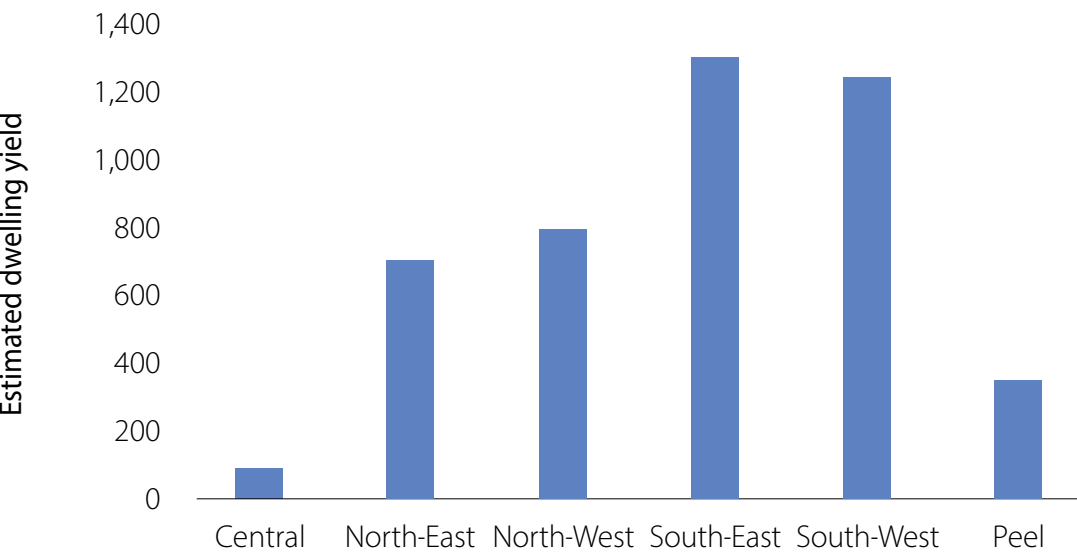
- Industrial land supply and development in the Perth region is volatile and is generally influenced by broader economic conditions and population growth.
- In the decade to 2019, approximately 210 hectares per annum have been consumed by subdivision, though this figure varies annually from 50 to 550 hectares, as per the [Economic and Employment Land Monitor 2020](#).
- Approximately 4,500 hectares of industrial land has been identified for development in the next 10+ years in ULDO 2023/24. Around 60 per cent of this is in the South-East and South-West sub-regions combined (**Figure 13**).
- The stock identified in ULDO 2023/24 represents just a subset of the total stock of industrial land across the metropolitan region. Overall, over 15,000 hectares of land are zoned for Industrial purposes across Perth and Peel.

Figure 12: Projected dwelling yield – Peel region



Source: Perth and Peel Urban Land Development Outlook 2023/24

Figure 13: Estimated land area of industrial projects identified in ULDO 2023/24



Source: Perth and Peel Urban Land Development Outlook 2023/24

Methods and Assumptions

A key input to the development of each Urban Land Development Outlook (ULDO) is the Developers' Intentions Survey, which is undertaken prior to the commencement of each ULDO. All landowners and developers with intentions to develop five or more lots or dwellings are sent a survey to gain an understanding of their intended development.

Survey respondents are requested to provide specific information about their projects. This includes the type of development, the expected total yield, staging and timing of the development, and identification of constraints and issues affecting the development.

The information is then compared against the Department's internal databases including region and local planning scheme rezonings, structure plans, subdivisions and Development Assessment Panels, along with local government approvals to verify the information provided.