REMPLAN

FUTURE ECONOMY: MADE IN AUSTRALIA, BUILT IN THE GROWTH AREAS

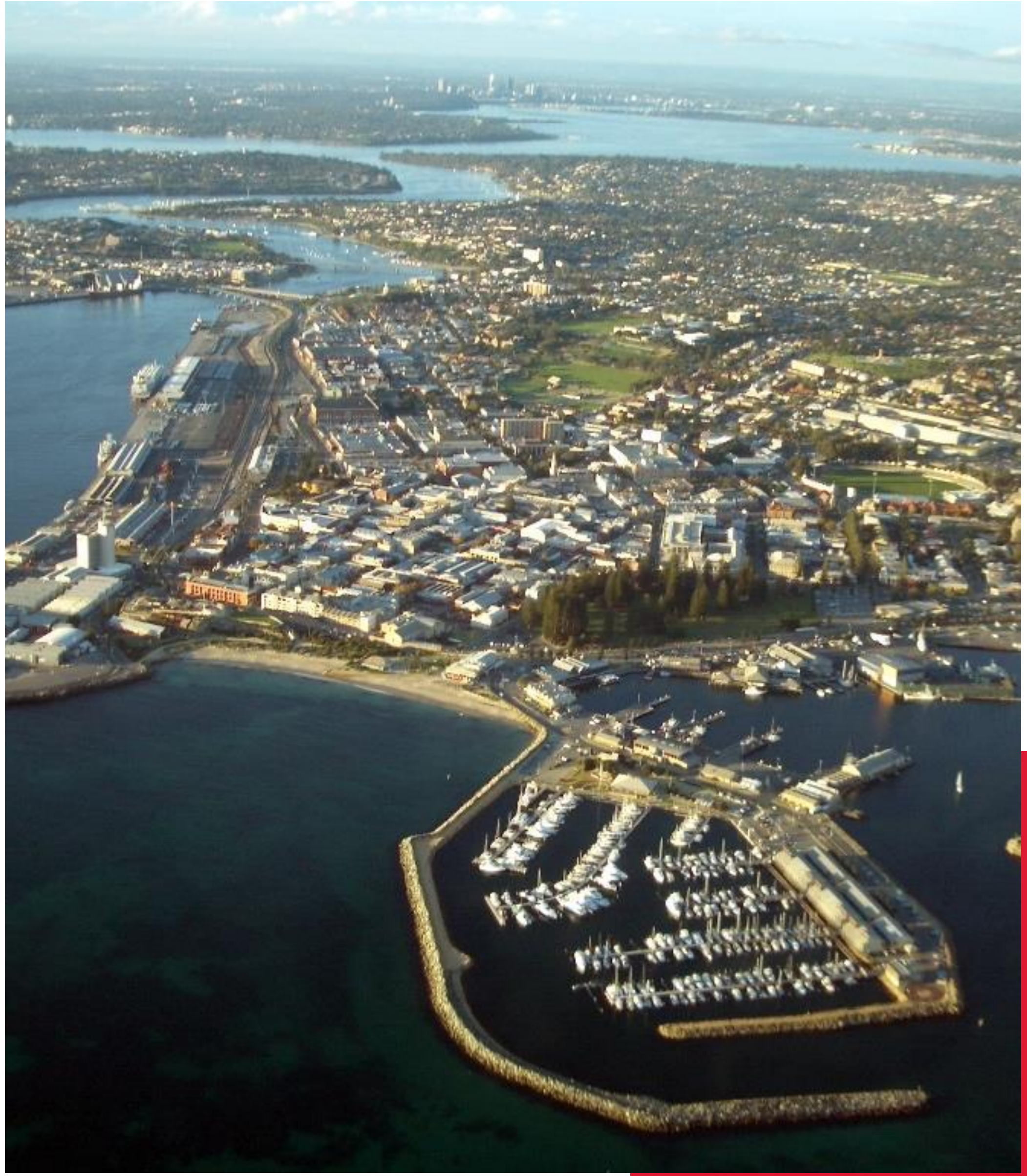
Nick Byrne

Director Advisory

NATIONAL GROWTH AREAS ALLIANCE: CONGRESS 2025

AGENDA

01	Population dynamics
02	Housing insights
03	Employment & industry (lite)
04	Areas to review and invest



DEFINING THE NATIONAL GROWTH AREA ALLIANCE

BY STATE

REMPLAN

& BY

ROLE AND FUNCTION – NGAA CLASSIFICATION

Emerging

Pop. <50,000

- Mount Barker District, SA
- Serpentine-Jarrahdale, WA

Expanding

Pop. 50,000-100,000

- Wollondilly, NSW
- Mitchell, VIC
- Kwinana, WA
- Mandurah, WA

Established

Pop. 100,000-200,000

- Camden, NSW
- Campbelltown, NSW
- Cardinia, VIC
- Playford, SA
- Armadale, WA
- Cockburn, WA
- Gosnells, WA
- Rockingham, WA
- Redland City, QLD

Transforming

Pop. 200,000- 350,000

- Wanneroo, WA
- Swan, WA
- Penrith, NSW
- Liverpool, NSW
- Hume, VIC
- Melton, VIC
- Whittlesea, VIC
- Wyndham, VIC
- Ipswich, QLD
- The Hills, NSW

Major Metro

Centres >350,000

- Blacktown, NSW
- Casey, VIC
- Moreton Bay, QLD
- Logan, QLD

WHAT IS THE SCALE OF THE GAA?

Home to 5,853,576 people. Median age is 35 years old.

1,646,470 local jobs. Almost 337k of residents employed in Health.

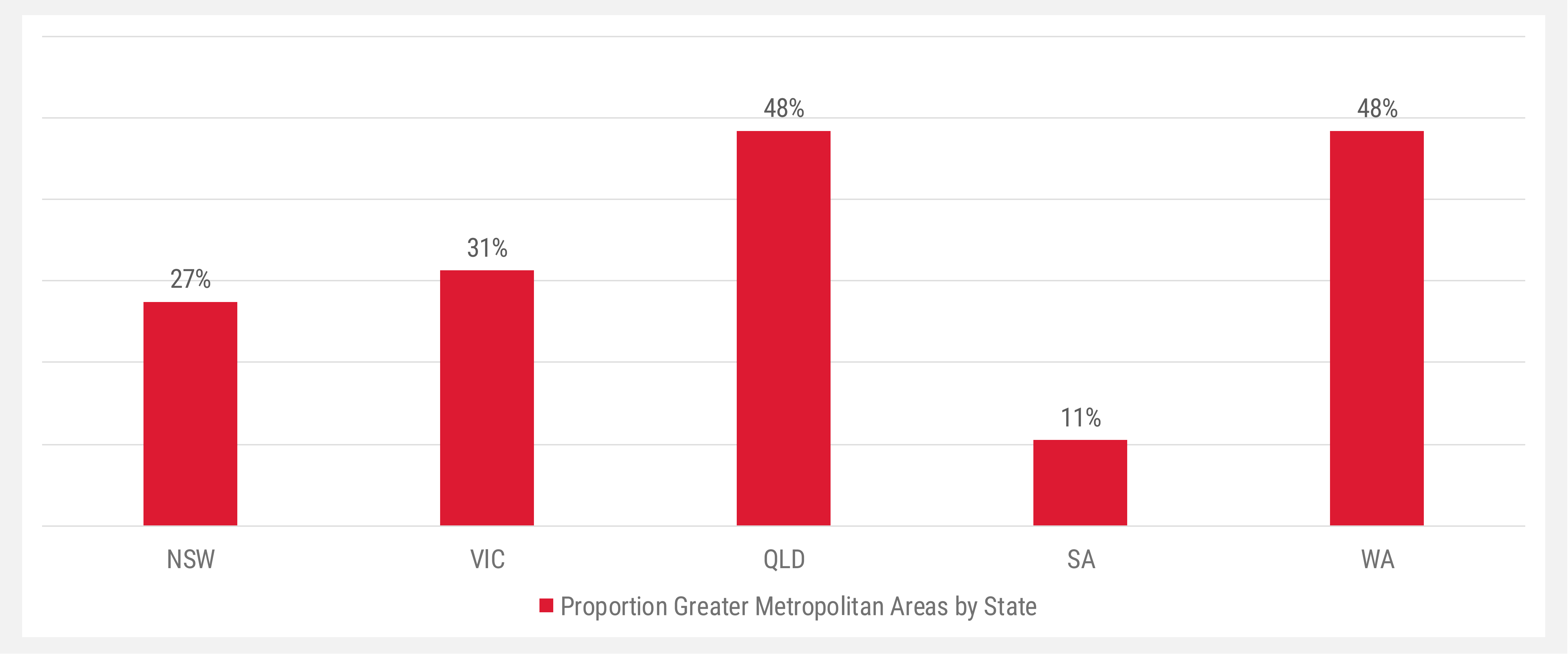
Annual economic output of $713.508 billion.

This represents:

- 21.5% of the nation's population
- 12.4% of Gross National Product

NATIONALLY, THE NGAA COVERS 43% OF THE METROPOLITAN AREAS

THIS REPRESENTS SIGNIFICANT LEVERAGE IN THE LARGEST ECONOMIC URBAN ENGINES

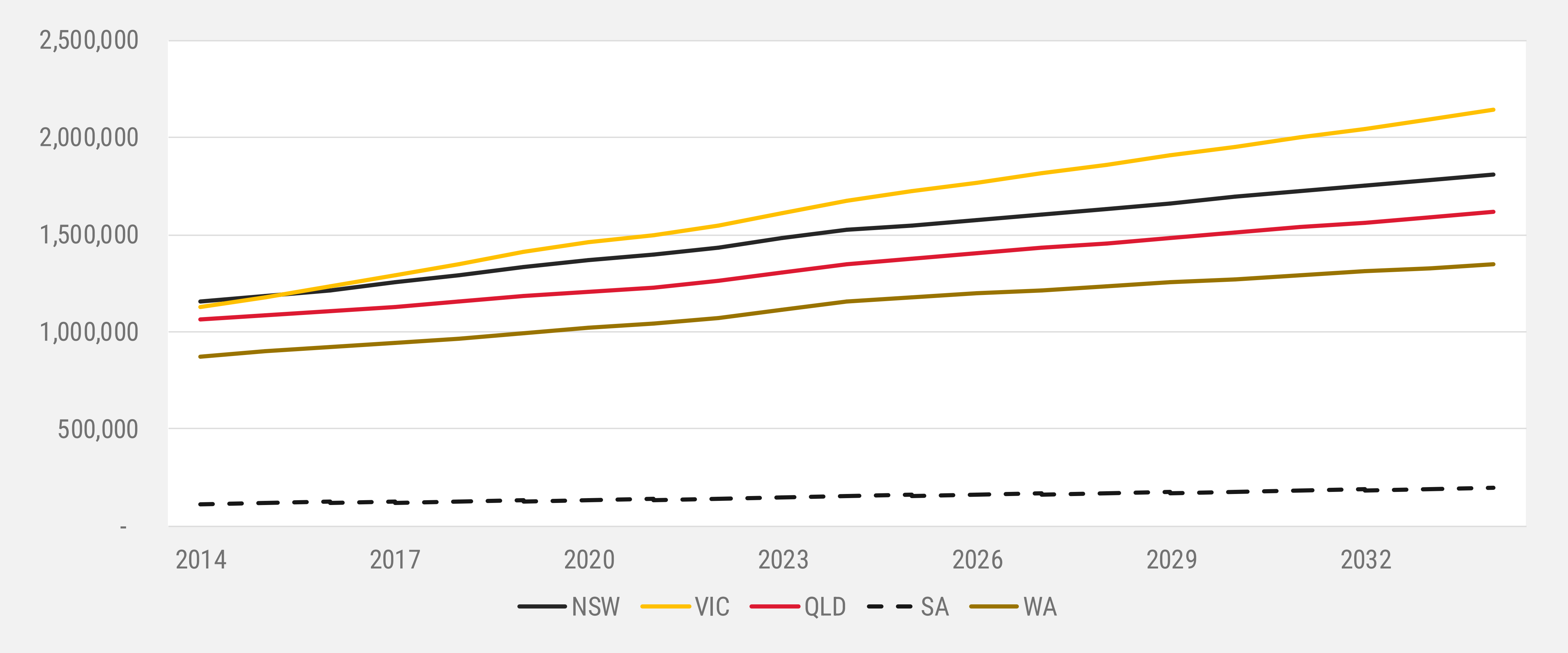


POPULATION DYNAMICS

Image: Campbelltown City Council

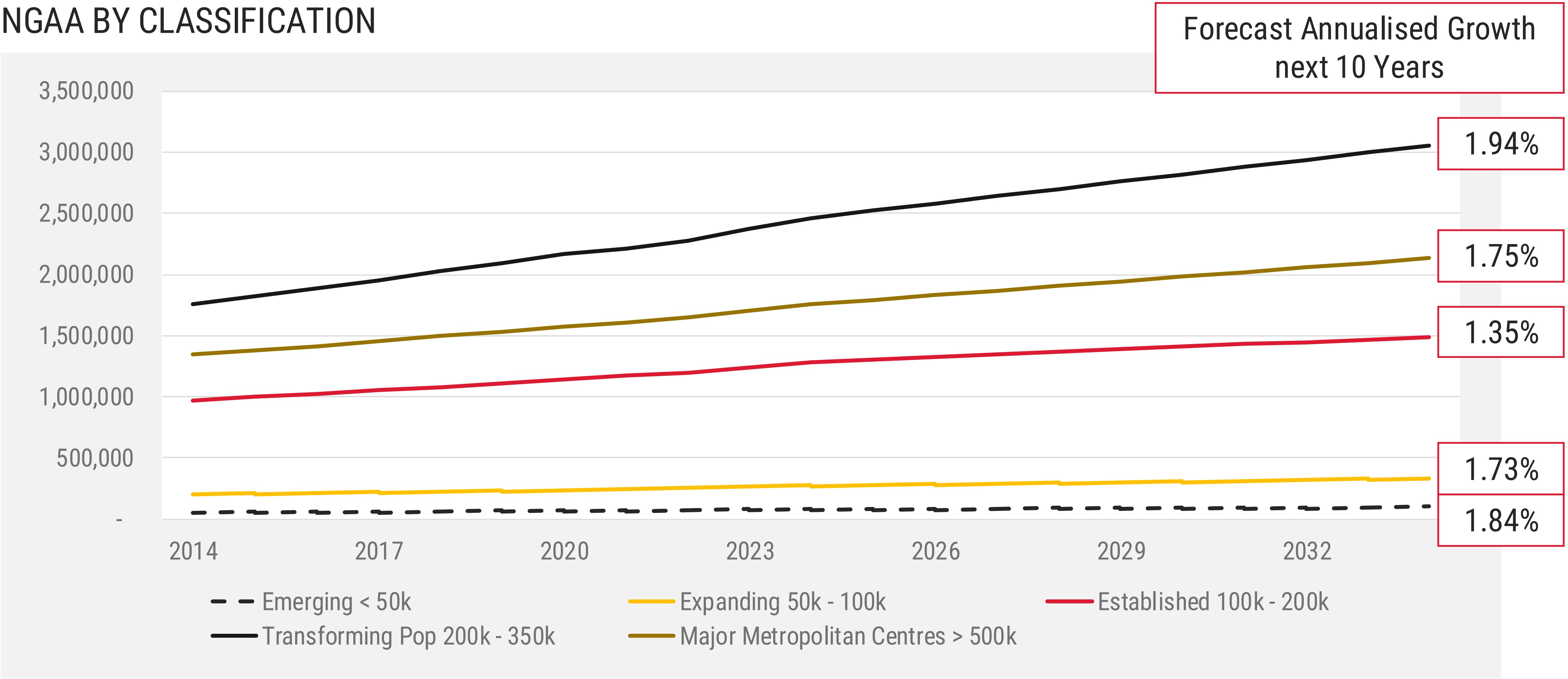
GROWING POPULATION IS A CONSISTENT THEME

NGAA BY STATE



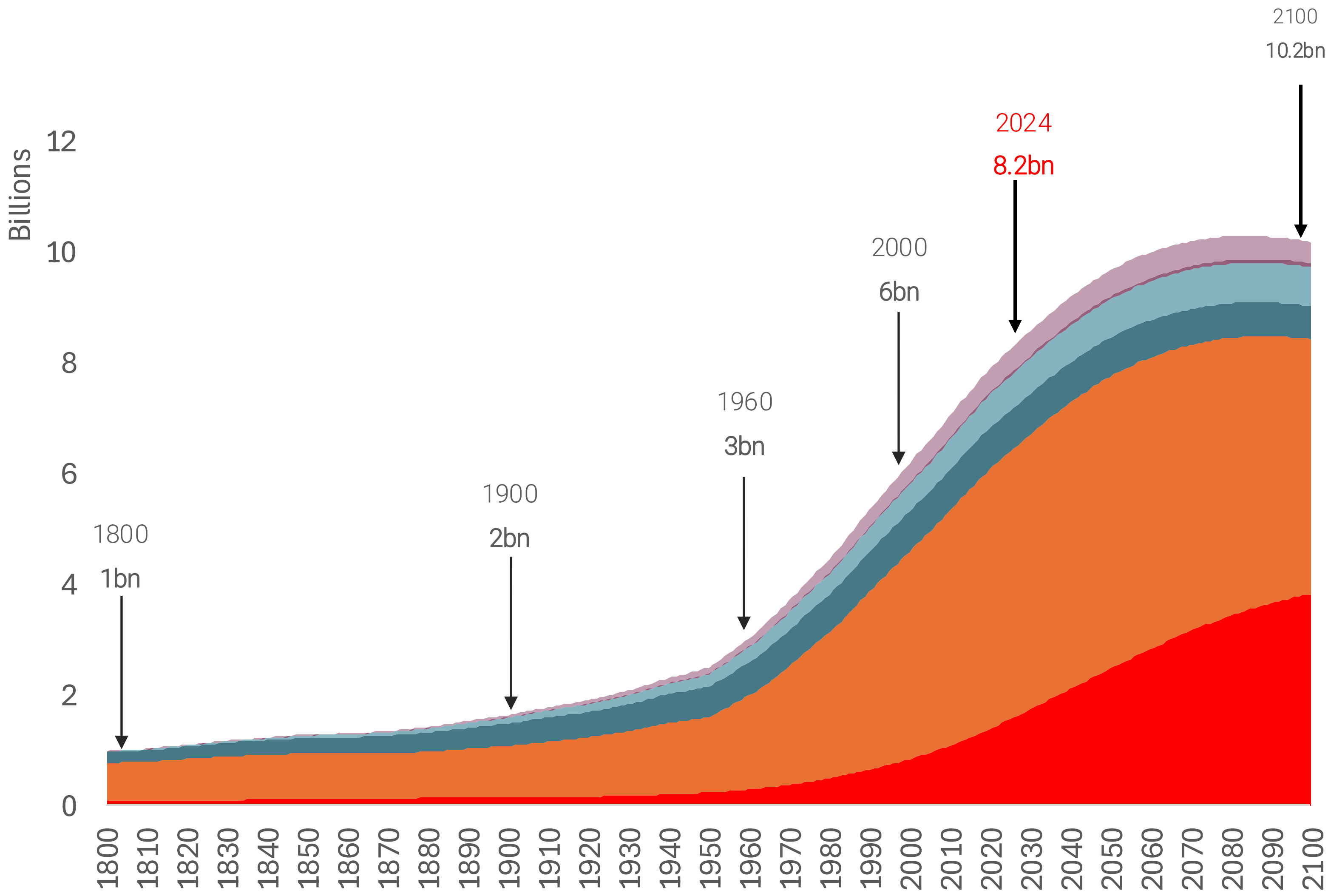
GROWING POPULATION IS A CONSISTENT THEME

NGAA BY CLASSIFICATION



Source: ABS & REMPLAN LGA Model

GROWTH NEEDS TO BE CONTEXTUALISED



Where is the Oceania Region?

Global population crossed the 8 billion mark on the 15th November 2022 and currently sits at 8.2 billion (2024).

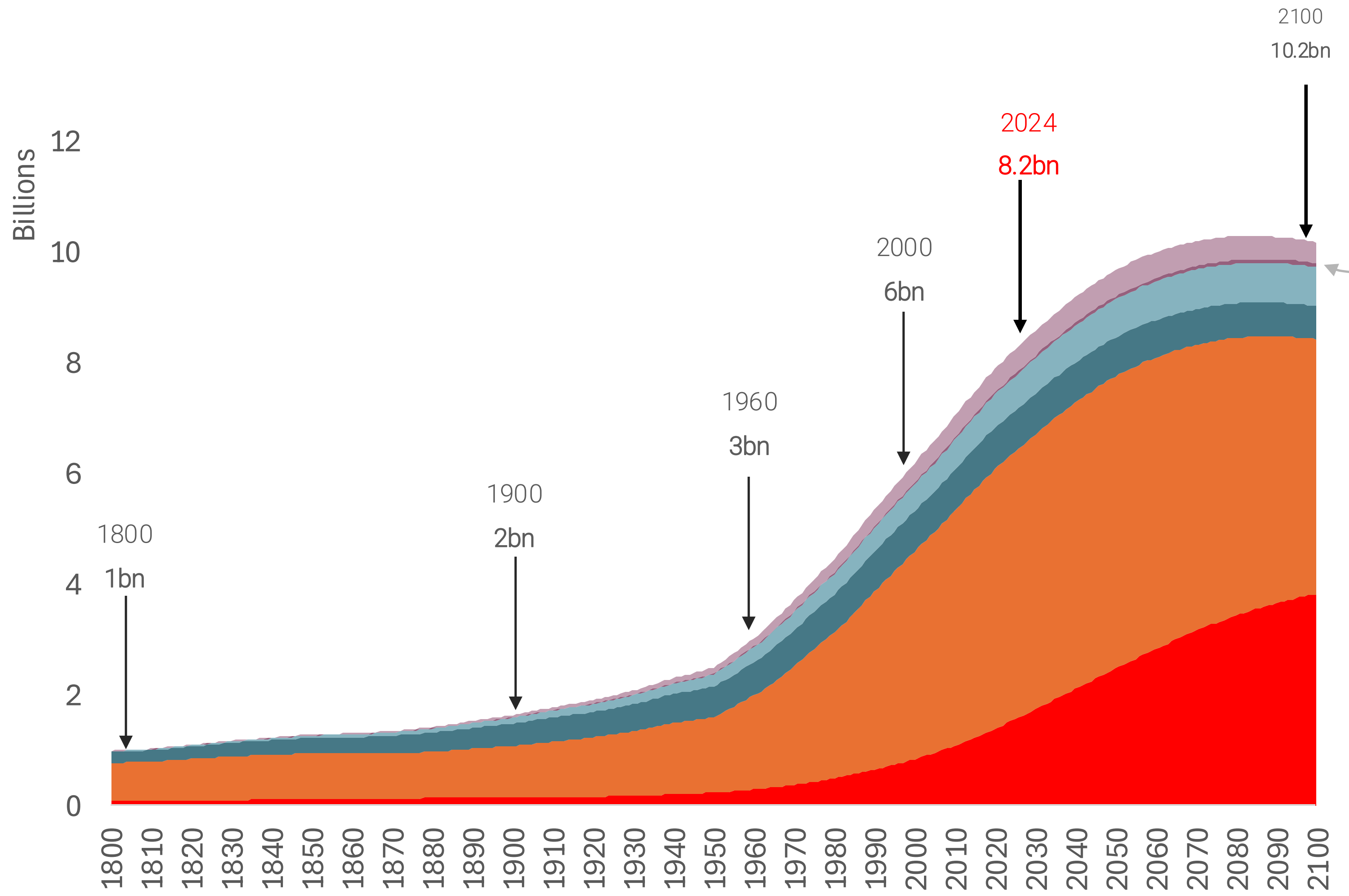
The United Nations projects the global population to peak around 10.3 billion in the mid-2080s, before declining to around 10.2 billion by the end of the century.

In 2019, the UN projected a population of **10.9 billion** by **2100**, but this has been revised down to **10.2 billion** in the 2024 update.

REMPLAN

Source: ABS; United Nations

OCEANIA BARELY MAKES AN IMPACT



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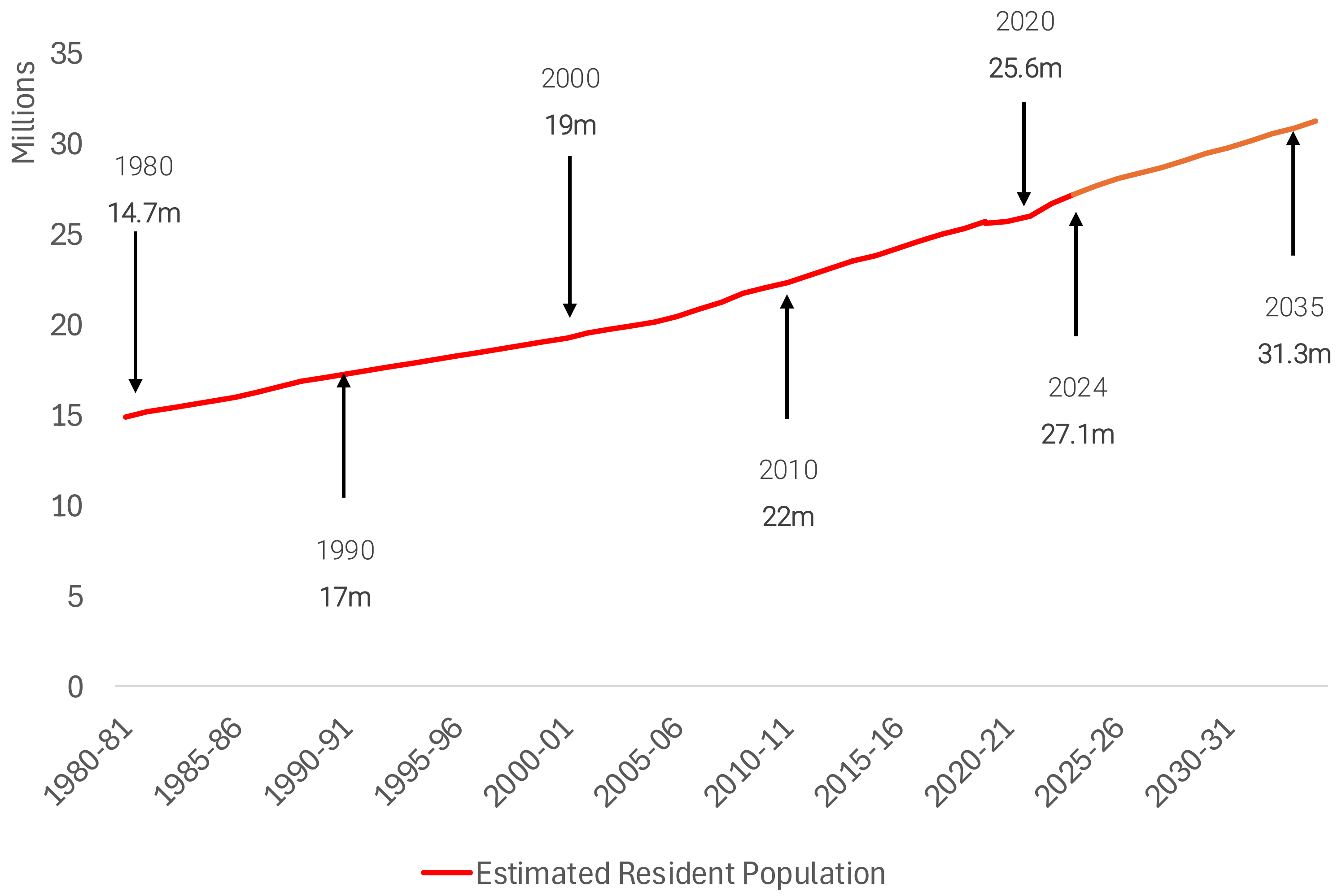
REMPLAN

Source: ABS; United Nations

POPULATION PROJECTIONS - AUSTRALIA



Australia's **population** is projected to grow from 27.1 million in March 2024 to 31.3 million people by 2034–35.

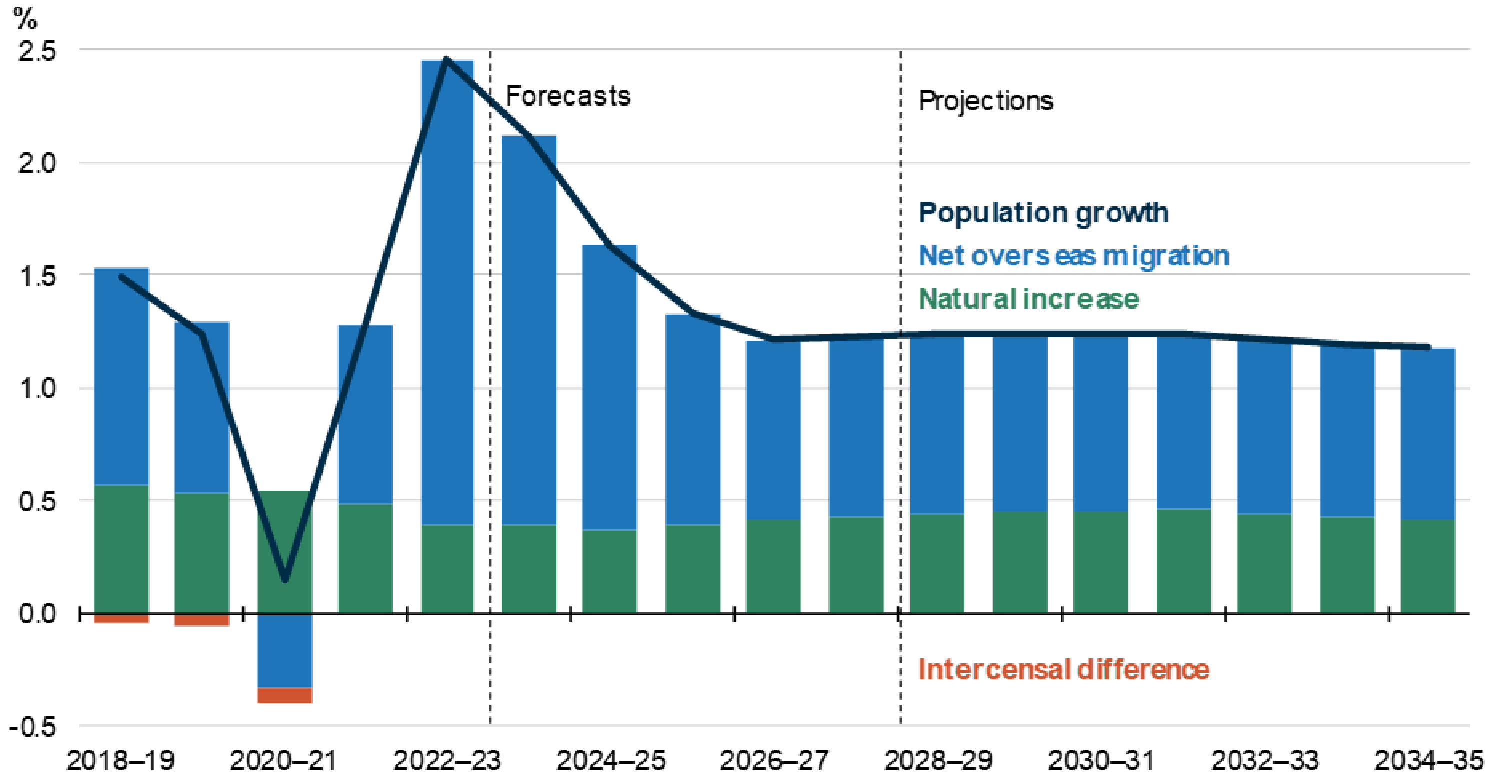
Annual **population growth** is forecast to decline from 2.1% in 2023–24 to 1.2% by 2034–35 as net overseas migration moderates.

The states and territories, as well as capital cities and regional areas, are projected to gradually return to their **pre-pandemic** population growth patterns.

The combined population of **capital cities** is projected to continue to grow nearly twice as fast as rest-of-state areas through to 2034–35.

Source: ABS; Australian Government Centre for Population 2024

DRIVERS OF POPULATION GROWTH



Drivers of growth are:

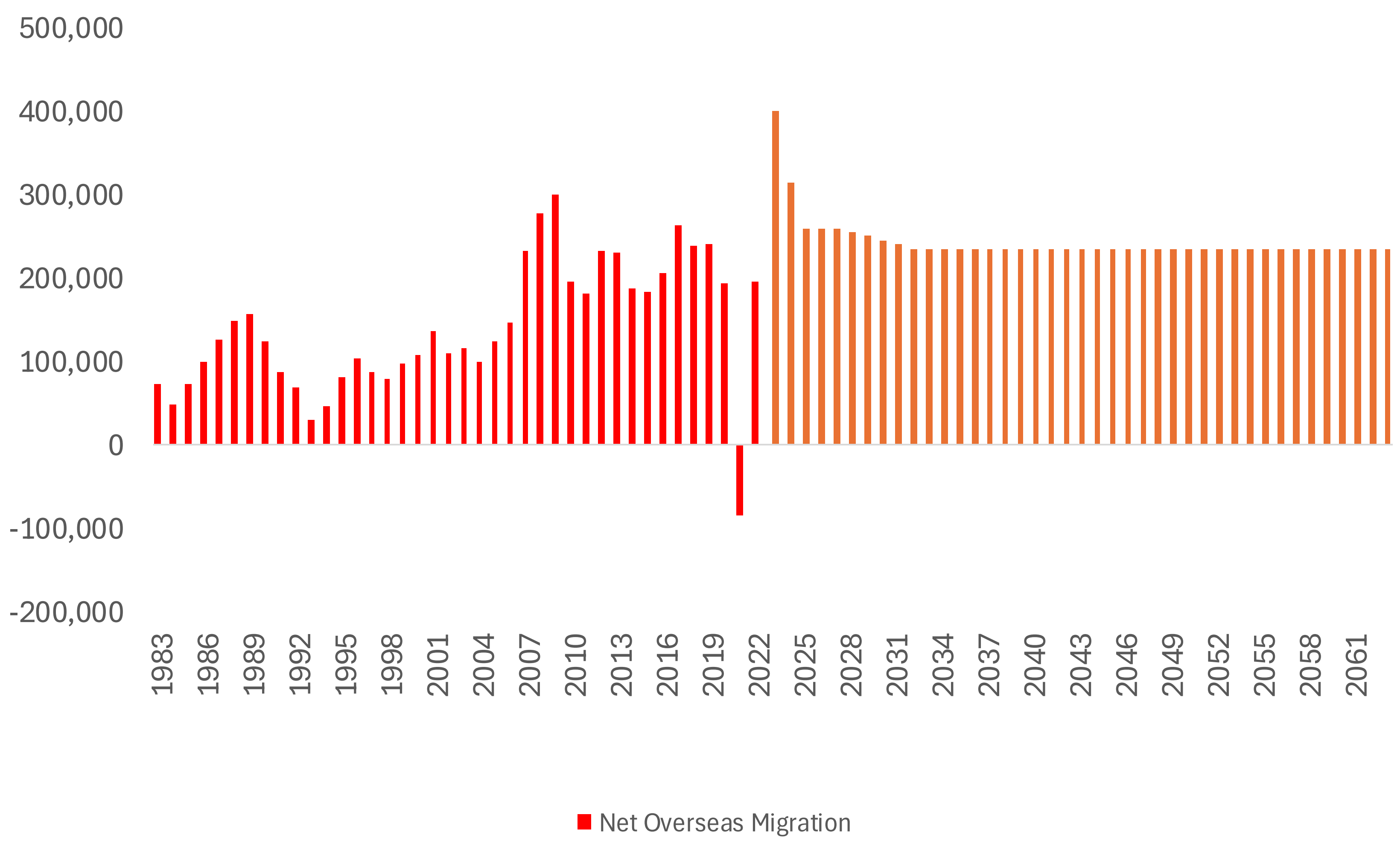
- Natural change (births minus deaths)
- Overseas Migration, and

NOM is projected to be the major factor driving growth.

Australians benefit from migration through higher economic growth, more job creation, improved wages and productivity. There can also be fiscal benefits to migration. However, these need to be weighed against pressures such as those on housing, through a well-calibrated migration system.

Source: ABS, National, state and territory population, March 2024; and Centre for Population.

Net **overseas migration** is the main driver of growth in Australia



Net overseas migration bounced back strongly to a new high after borders reopened following COVID-19.

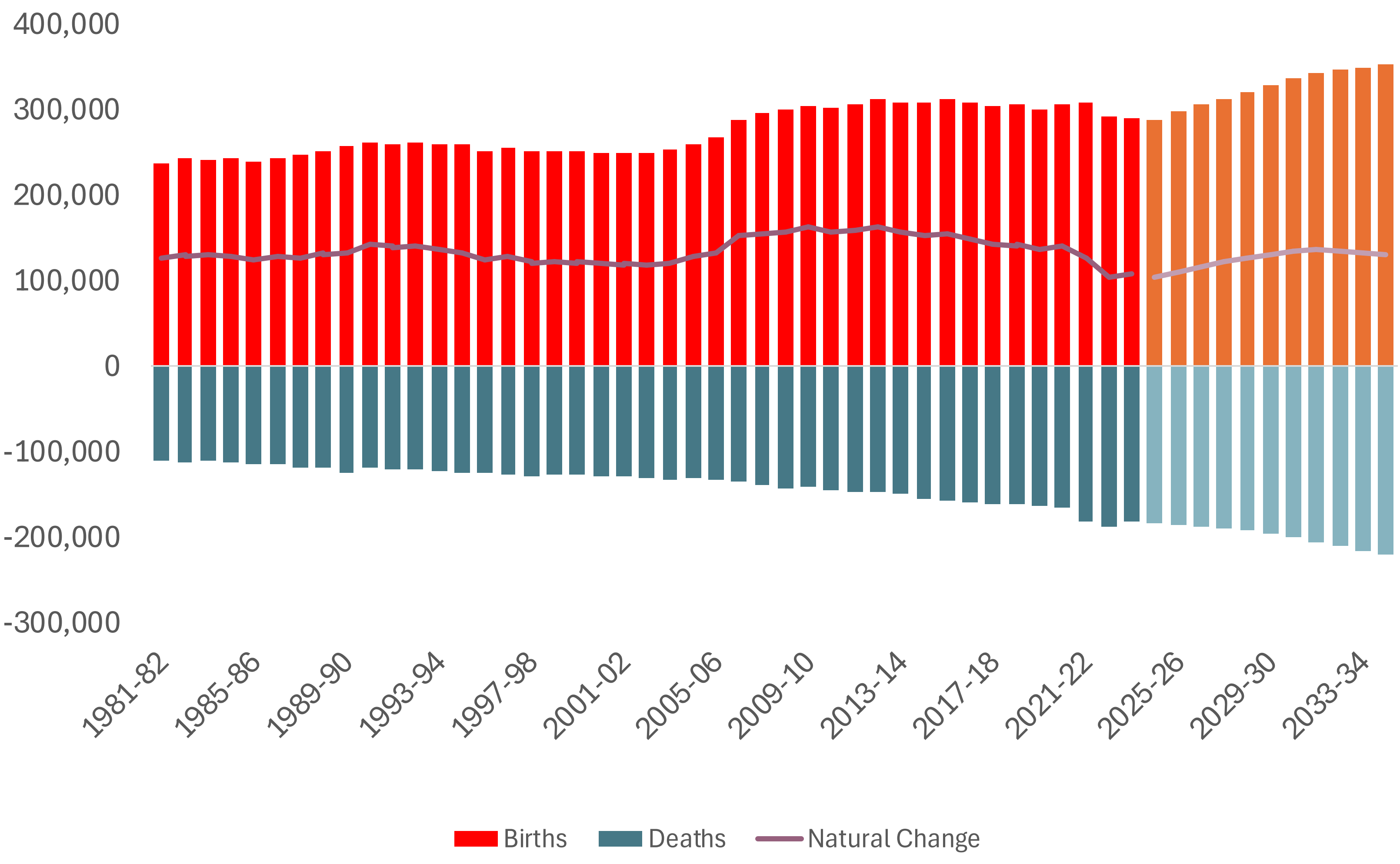
Official government figures still point to the plan for strong overseas migration. This is a Federal Government policy where targets can be lowered or increased as desired.

That said, there are down-side risks to these figures as policy challenges such as housing affordability and housing shortages are leading to calls to reconsider these targets and potentially reduce the number of overseas migrants.[1]

[1] https://grattan.edu.au/news/how-migration-affects-housing-affordability/

Source: Treasury, Intergenerational Report 2023

Australia continues to age, **natural change** is continuing to decline



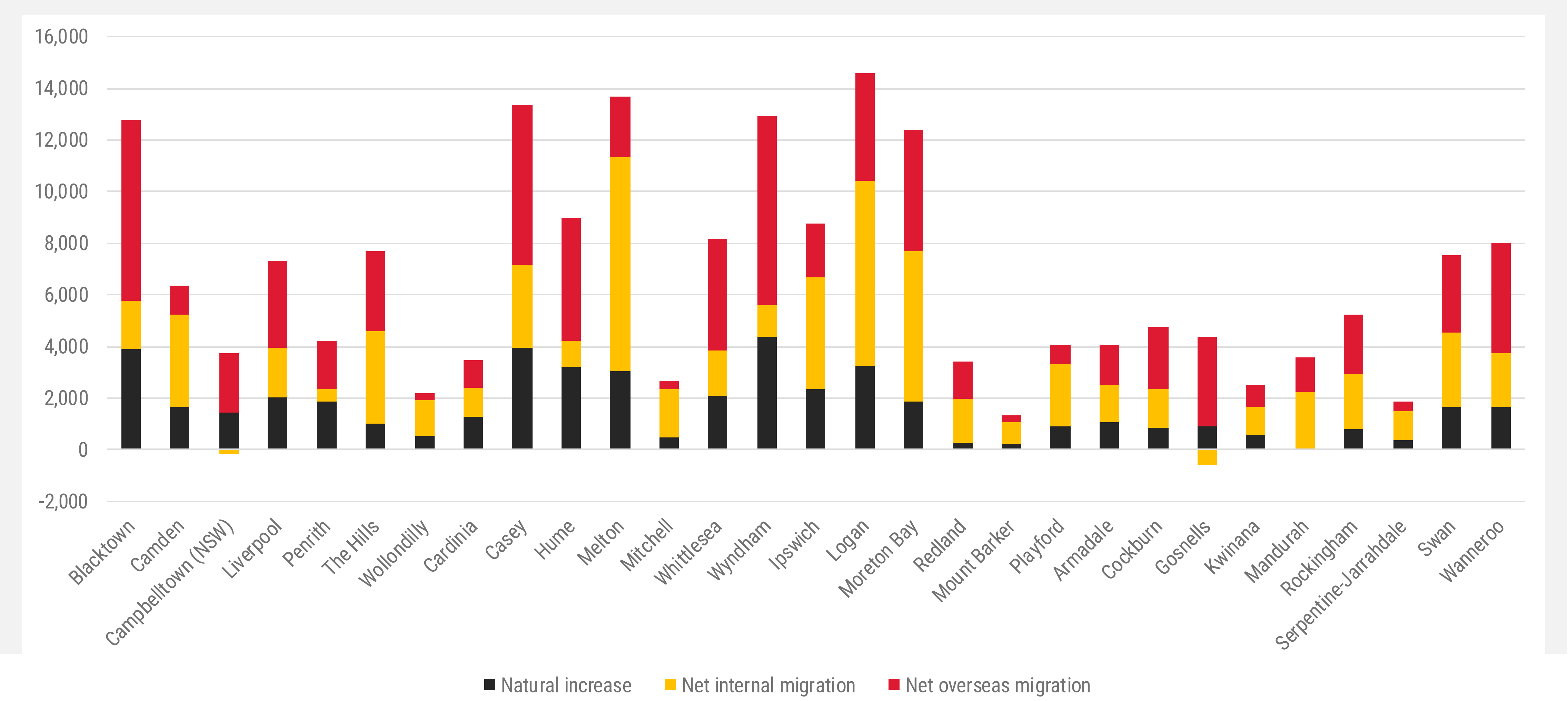
Natural change (calculated as births less deaths) continues to contribute to population growth albeit at a declining rate.

Over the forecast horizon natural change is expected to be at lower levels to what has been experienced in the 2000's to date, as our large aging population cohorts will lead to more deaths. This is despite continued increases in life expectancy.

The number of deaths is more predictable (through mortality rates) than the number of births as the outlook for fertility rates is less clear.

Source: Treasury, Intergenerational Report 2023

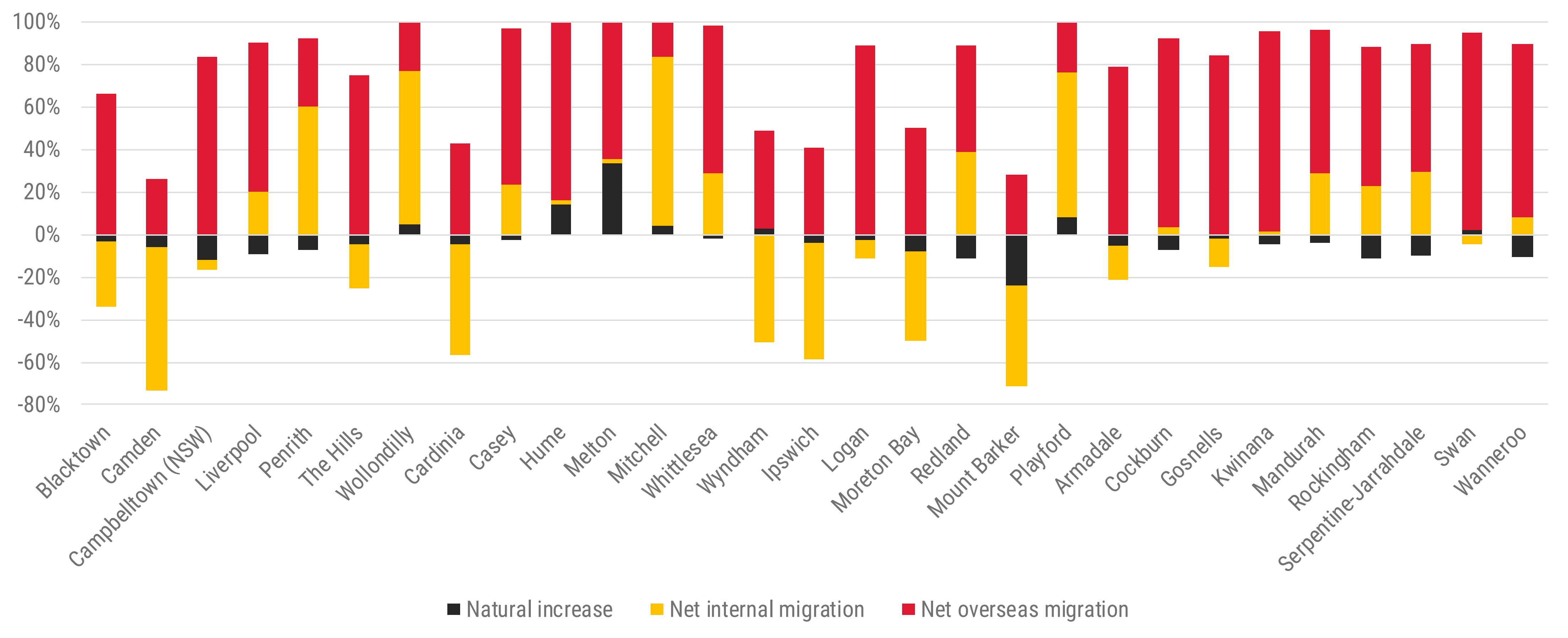
COMPONENTS OF CHANGE 2024 IN THE NGAA



Source: ABS, Regional population, 2023-24

COMPONENTS OF CHANGE

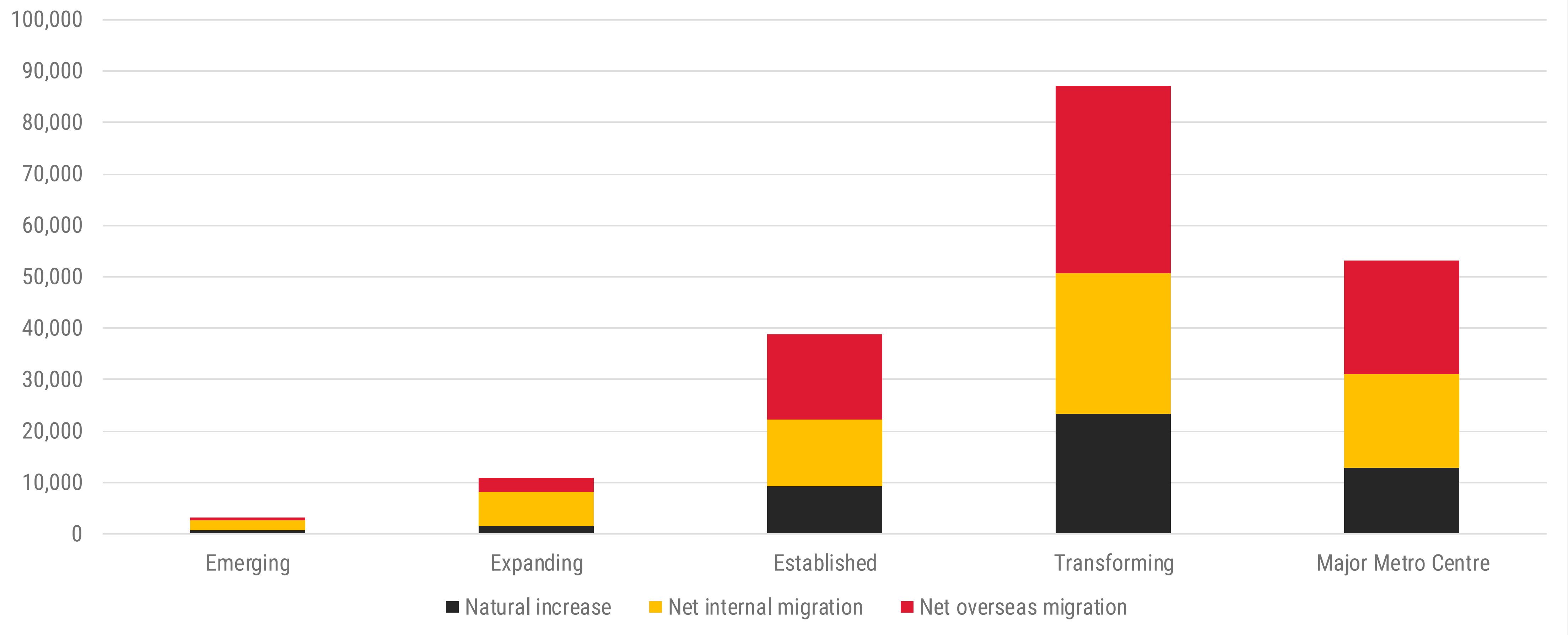
Percentage Difference between 2022 – 2024



REMPLAN

Source: ABS, Regional population, 2023-24

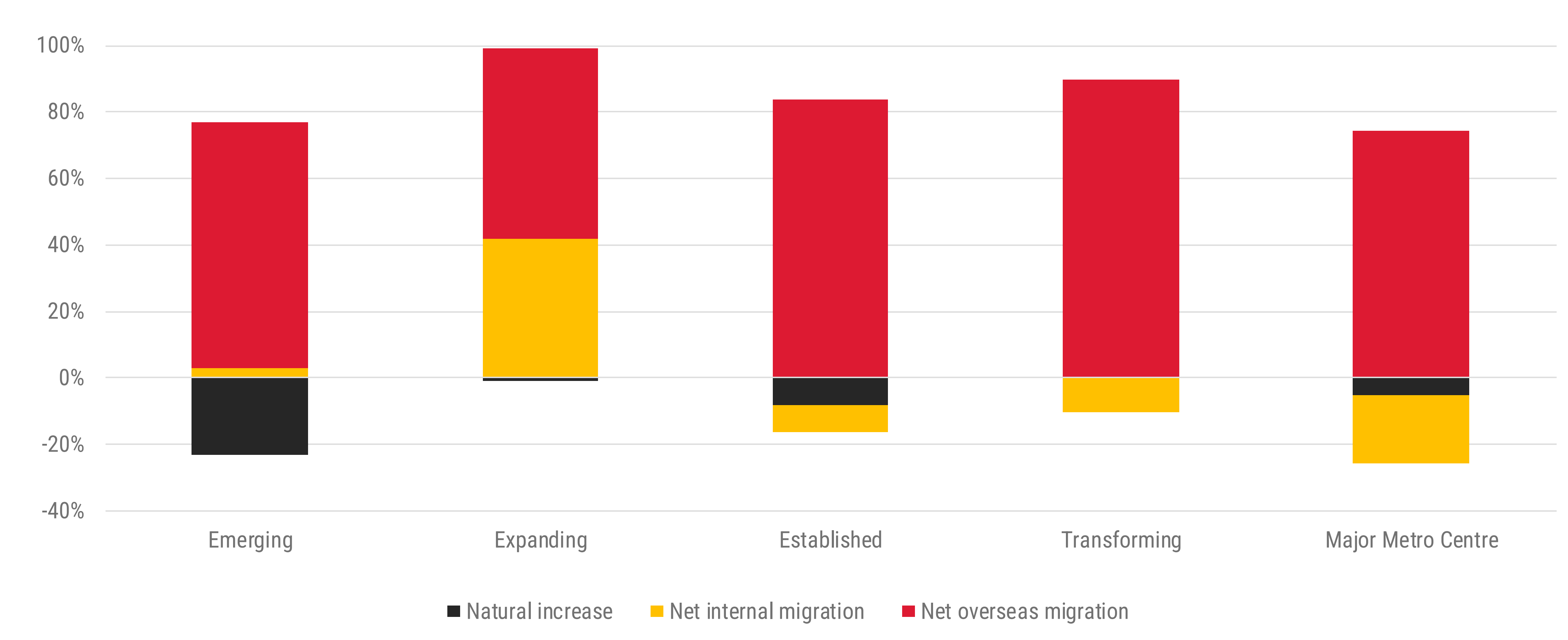
COMPONENTS OF CHANGE – NGAA CLASSIFICATION 2024



Source: ABS, Regional population, 2023-24

COMPONENTS OF CHANGE – NGAA CLASSIFICATION

Percentage Difference between 2022 – 2024



Source: ABS, Regional population, 2023-24

HOUSING INSIGHTS

Image: Renewal SA

HOUSING DEMAND - NATIONAL HOUSING ACCORD

- 1.2 million new well-located homes built from mid-2024 to mid-2029.
- Planning and implementation varies across States including adopted targets.
- Shifts in housing typology are expected to support changing household structures, ageing and broader urban design / SDG objectives.

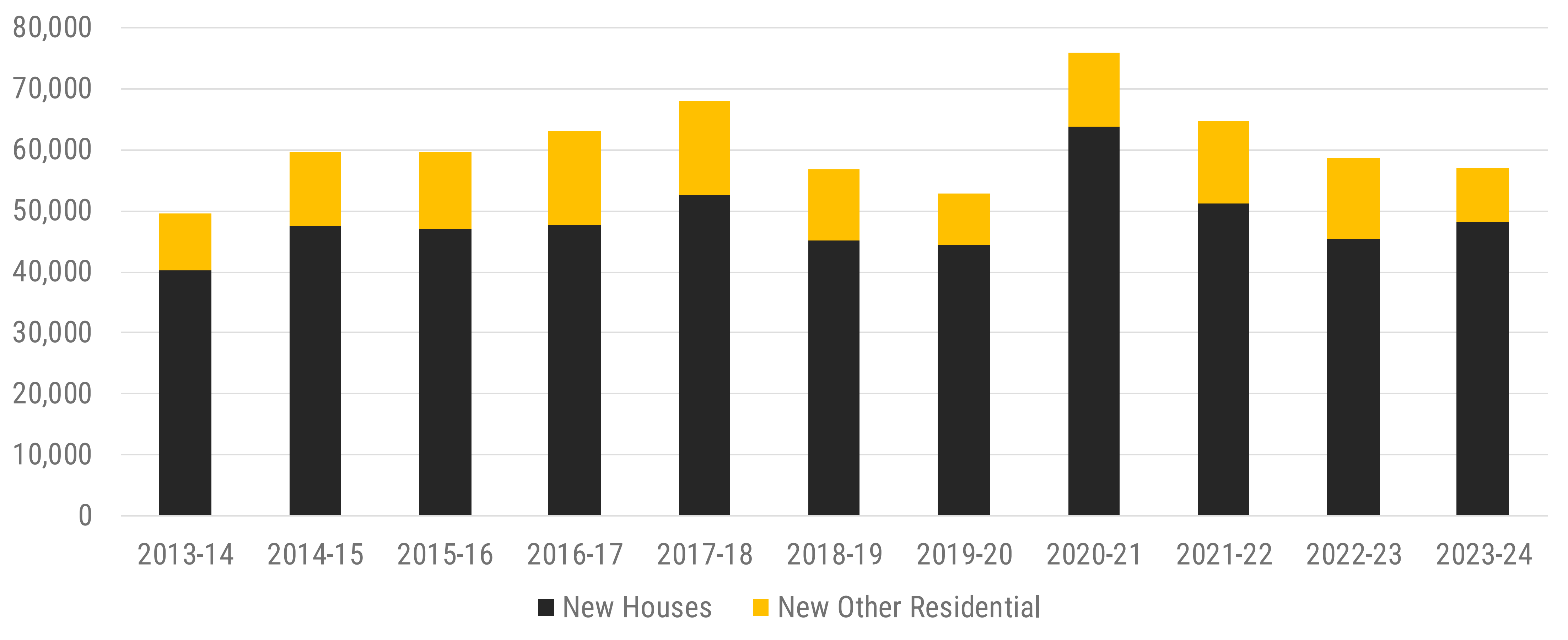
30-50%
delivered in NGAA

240,000
per year

20,000
affordable homes

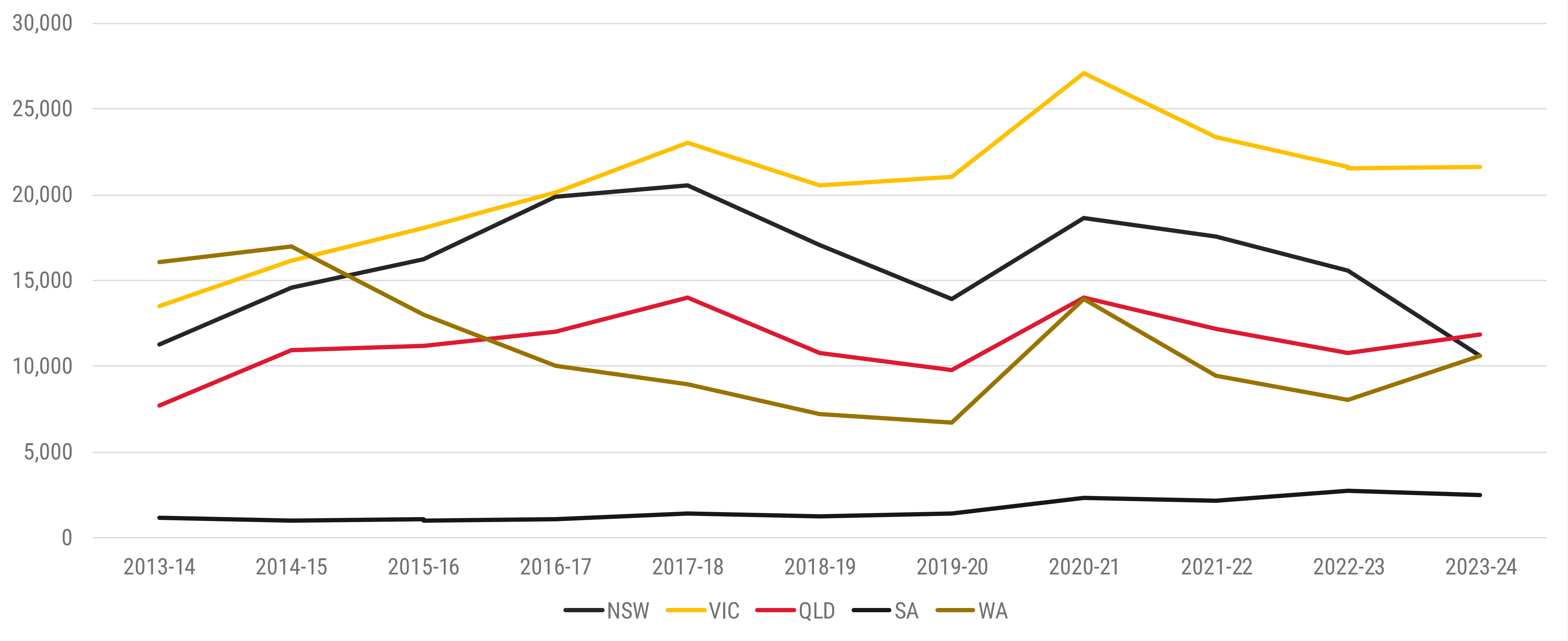
4,600
homes per week nationally

BUILDING APPROVALS



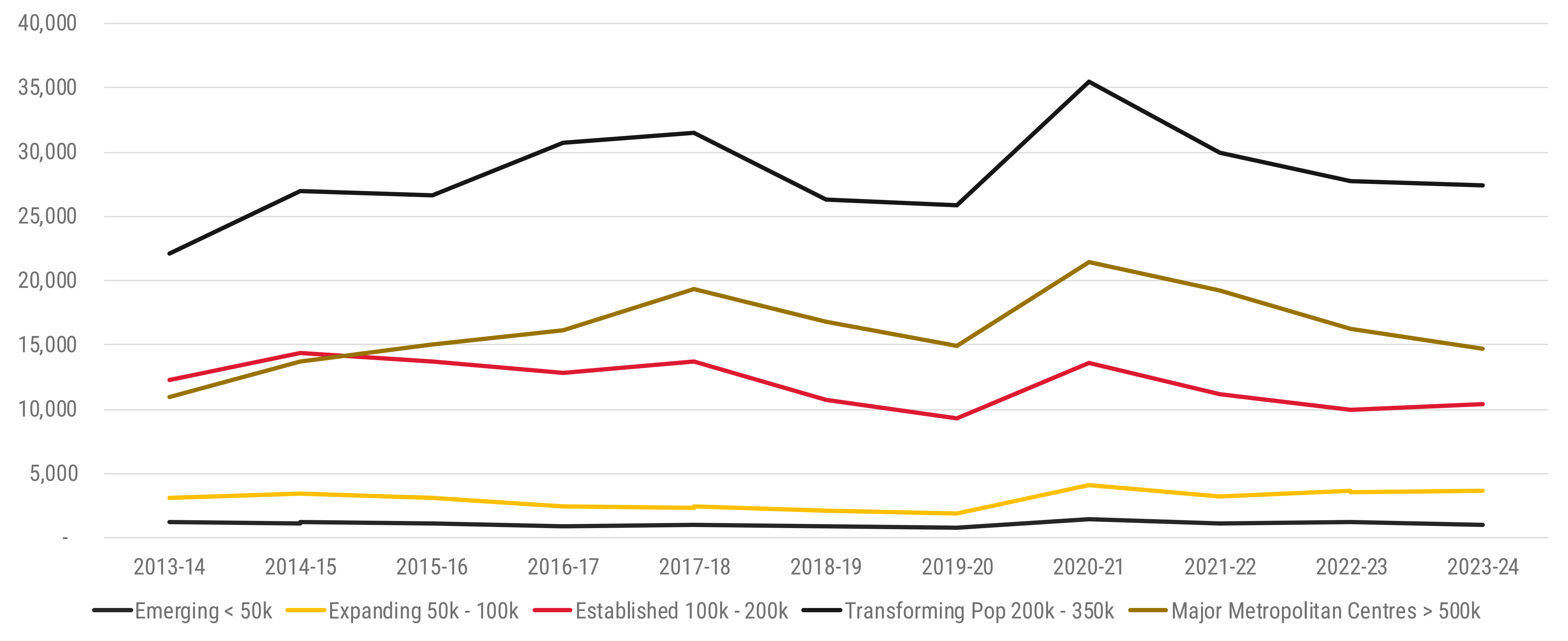
Source: REMPLAN Housing.

BUILDING APPROVALS BY STATE



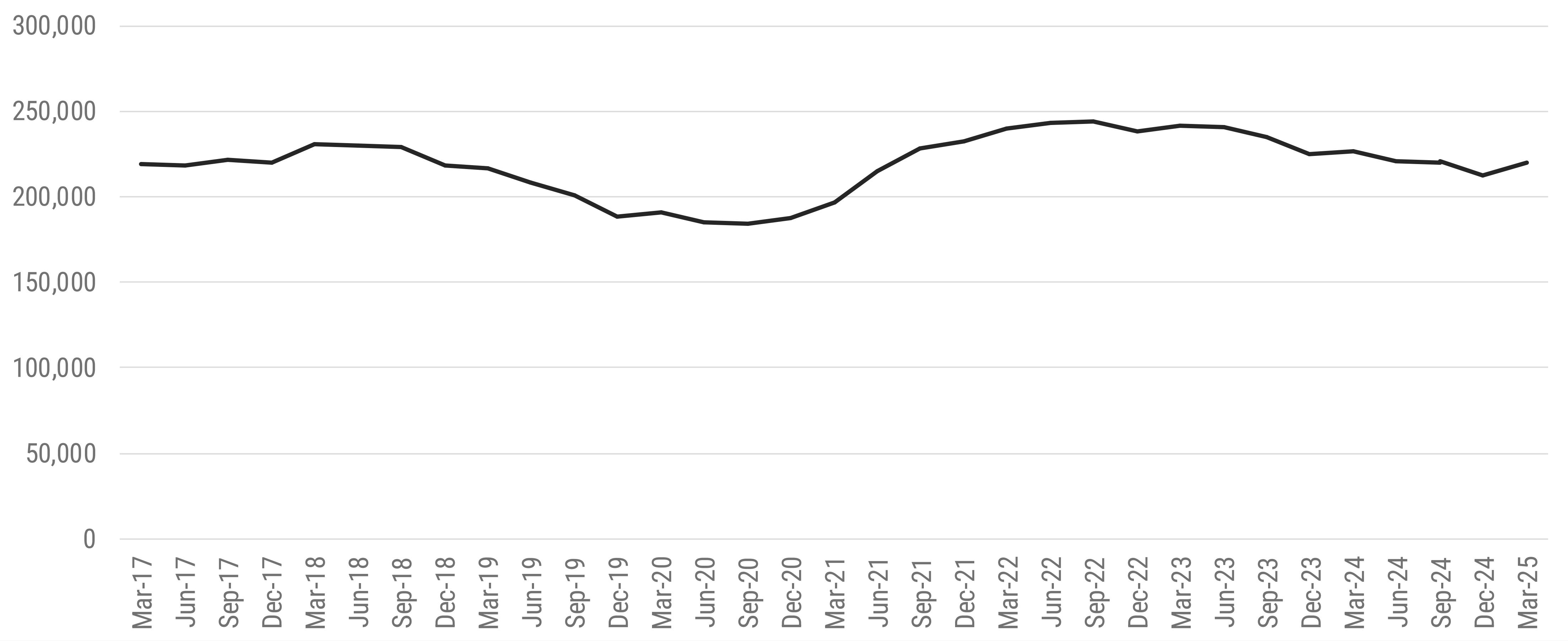
Source: REMPLAN Housing.

BUILDING APPROVALS BY NGAA CLASSIFICATION



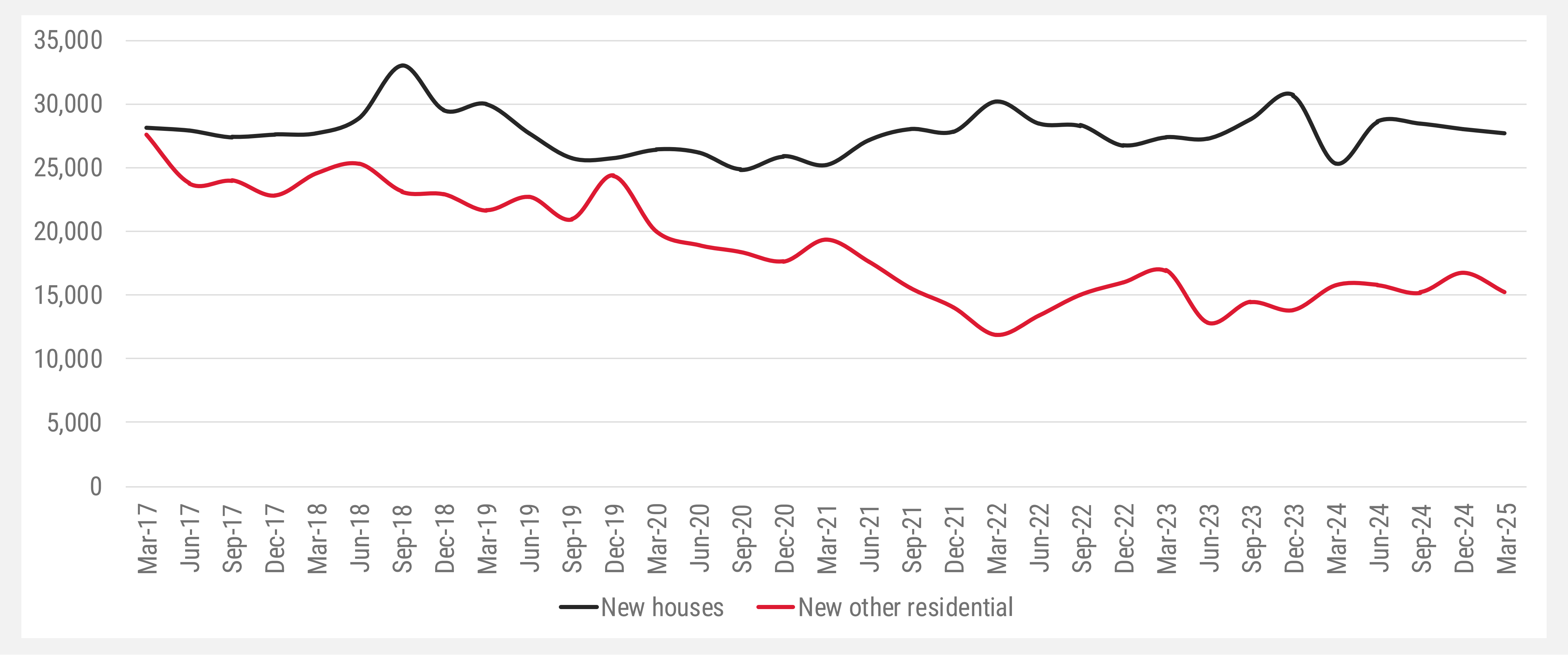
TOTAL DWELLINGS UNDER CONSTRUCTION

MARCH 2017 TO MARCH 2025



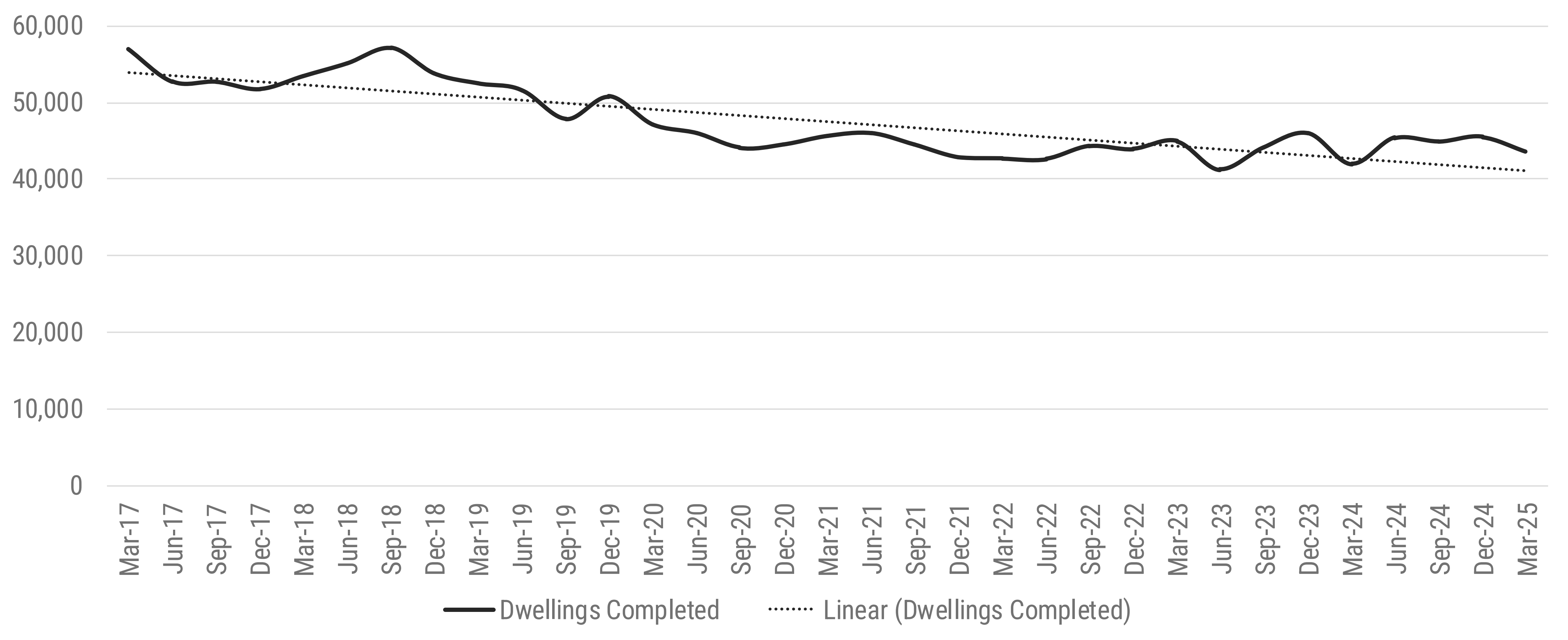
Source: Australian Bureau of Statistics, Building Activity, Australia March 2025

PRIVATE DWELLINGS COMPLETED



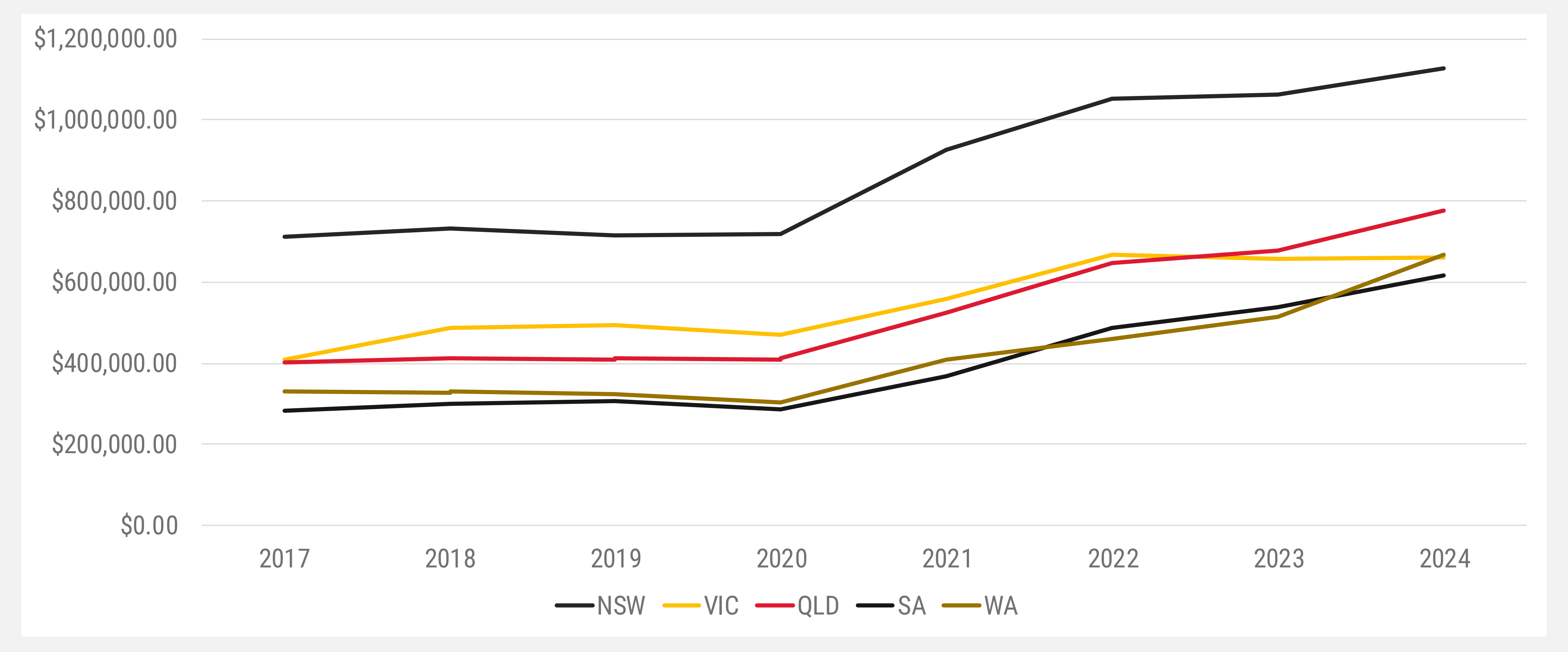
Source: Australian Bureau of Statistics, Building Activity, Australia March 2025

DWELLINGS COMPLETED



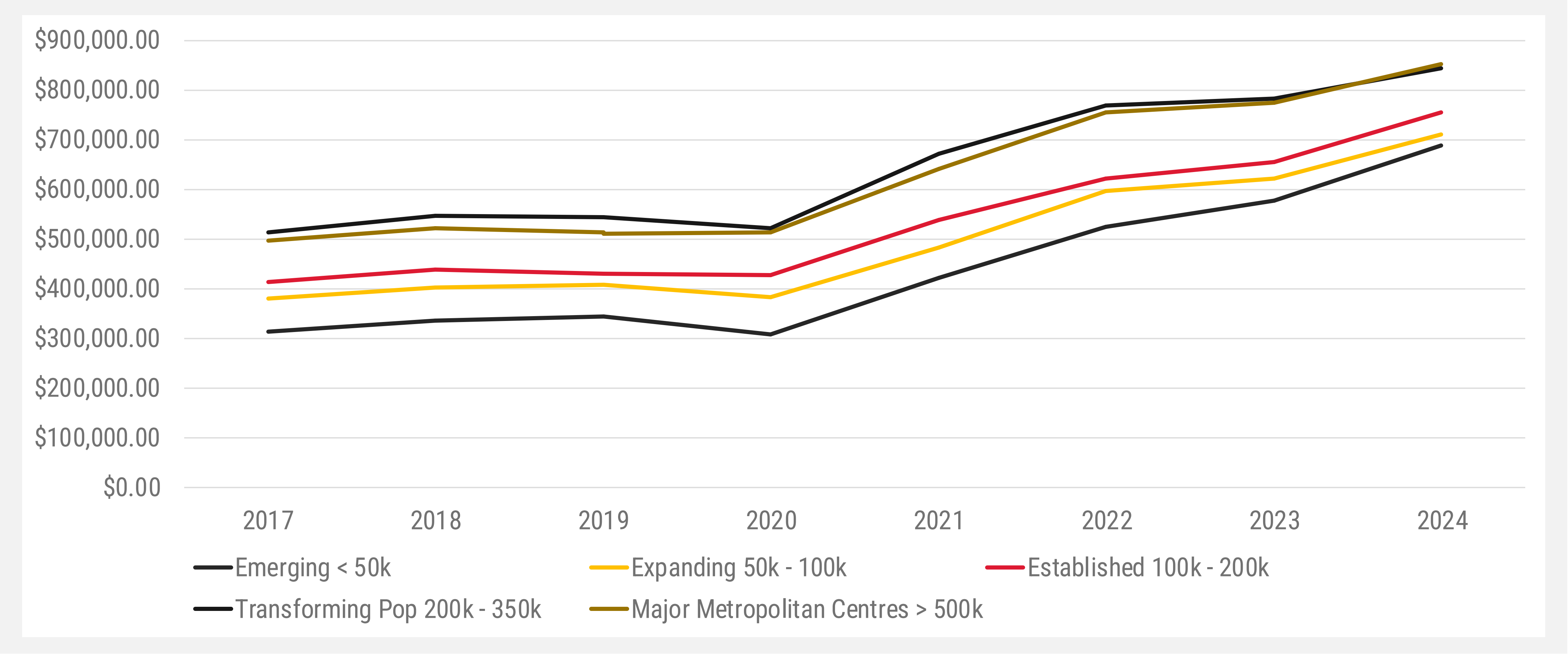
Source: Australian Bureau of Statistics, Building Activity, Australia March 2025

MEDIAN HOUSE PRICE
(AVERAGE ACROSS NGAA BY STATE)

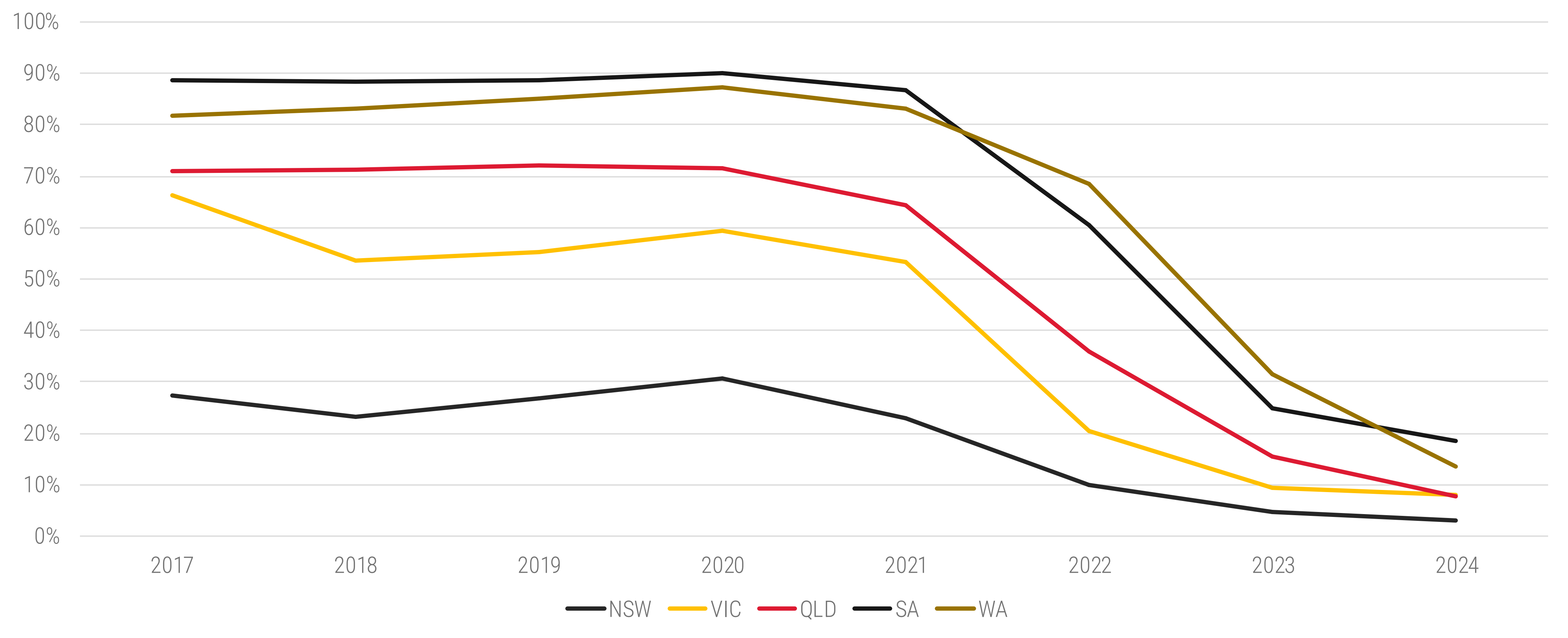


Source: REMPLAN Housing.

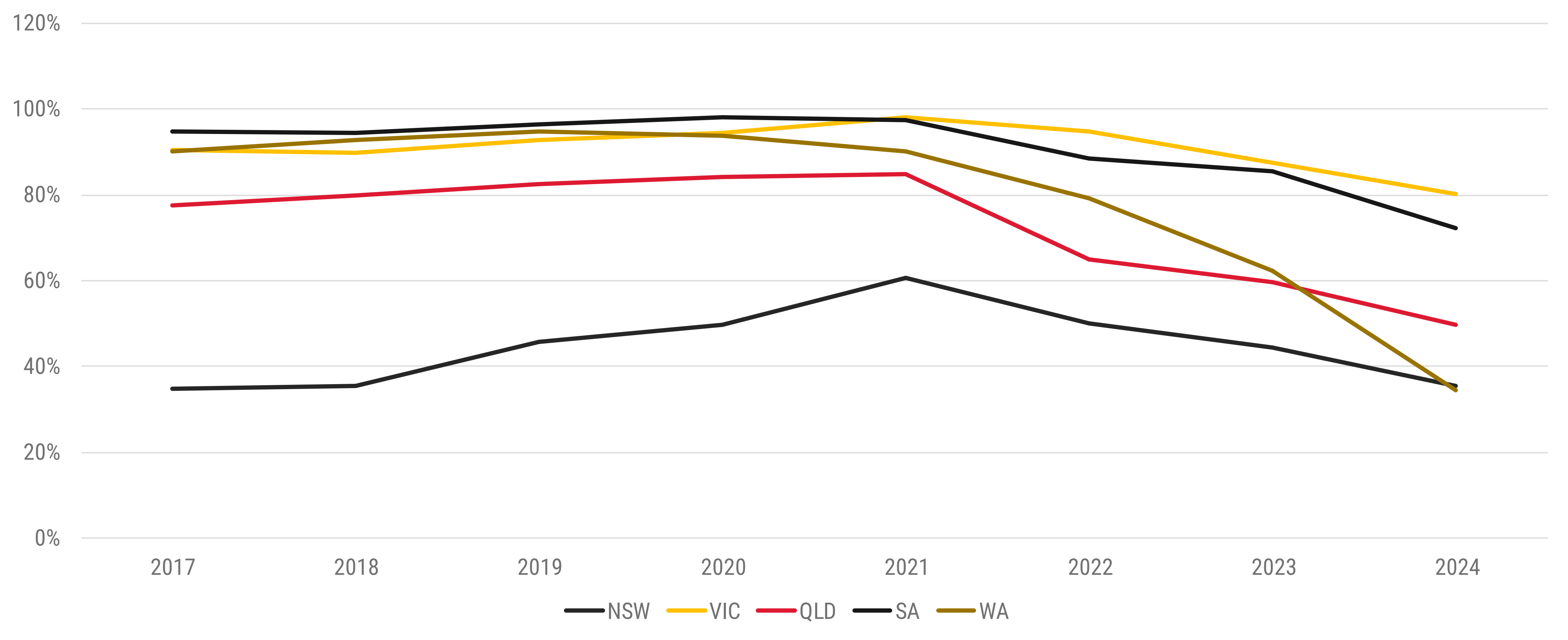
MEDIAN HOUSE PRICE
(AVERAGE ACROSS NGAA CLASSIFICATION)



SALES OF AFFORDABLE HOUSING

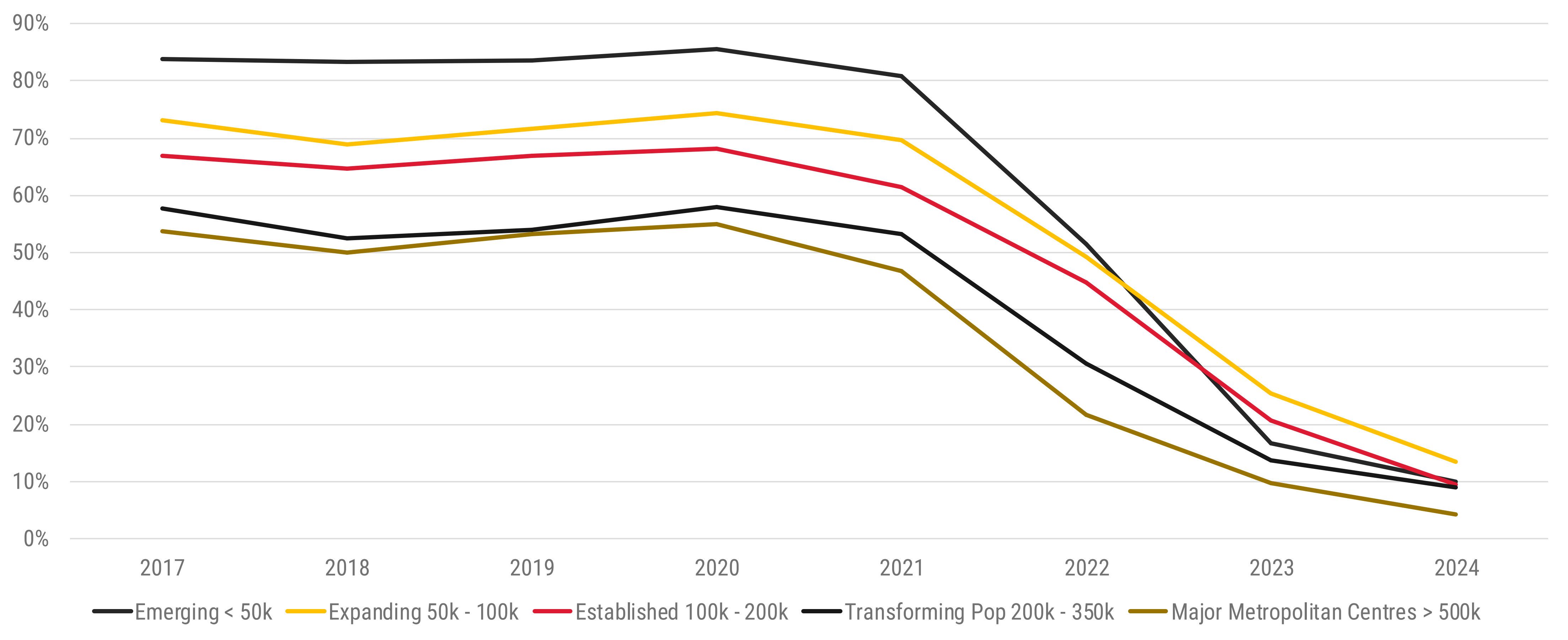


AFFORDABLE RENTAL LISTINGS

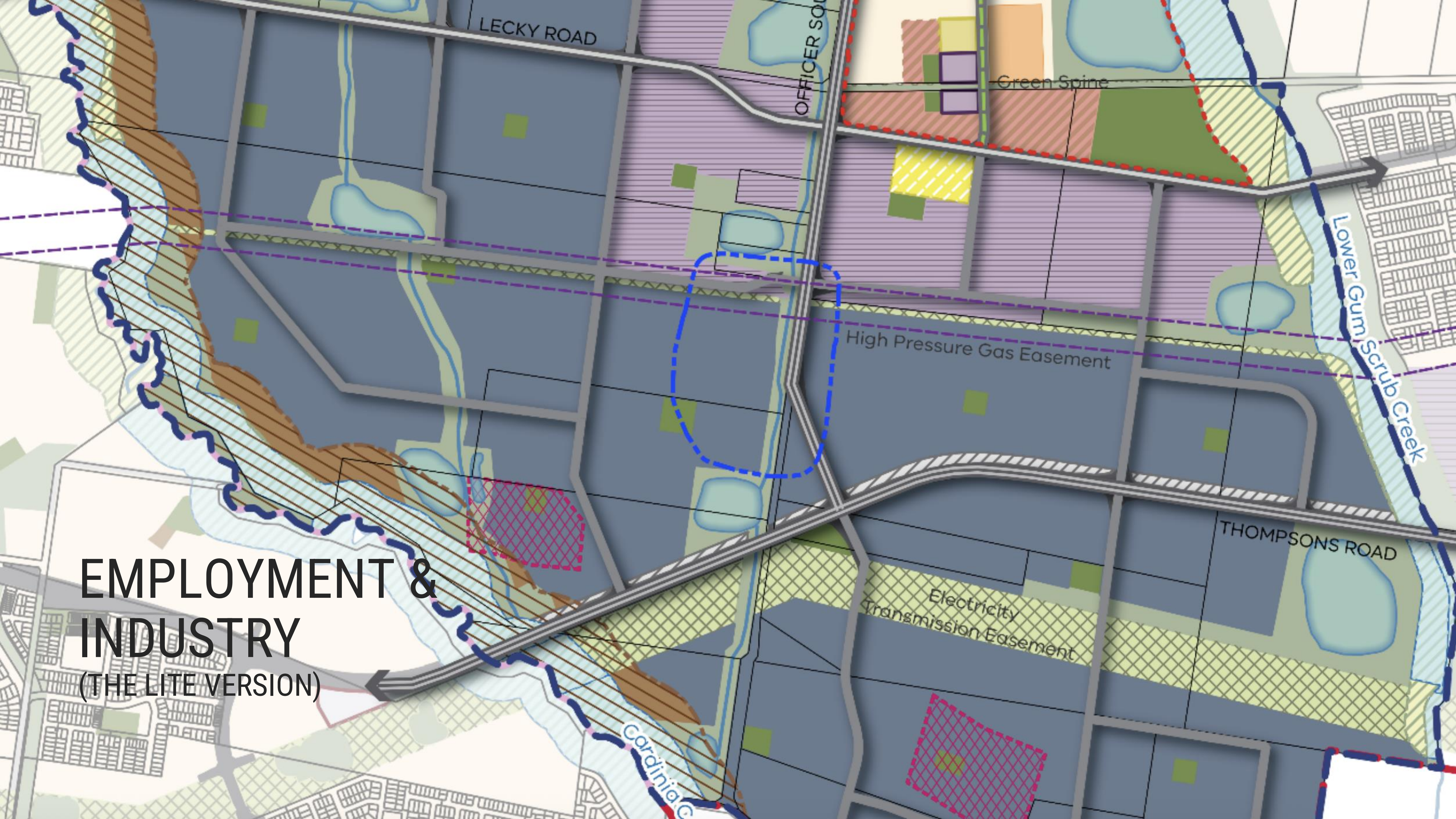


Source: REMPLAN Housing.

AFFORDABLE SALES - NGAA CLASSIFICATION

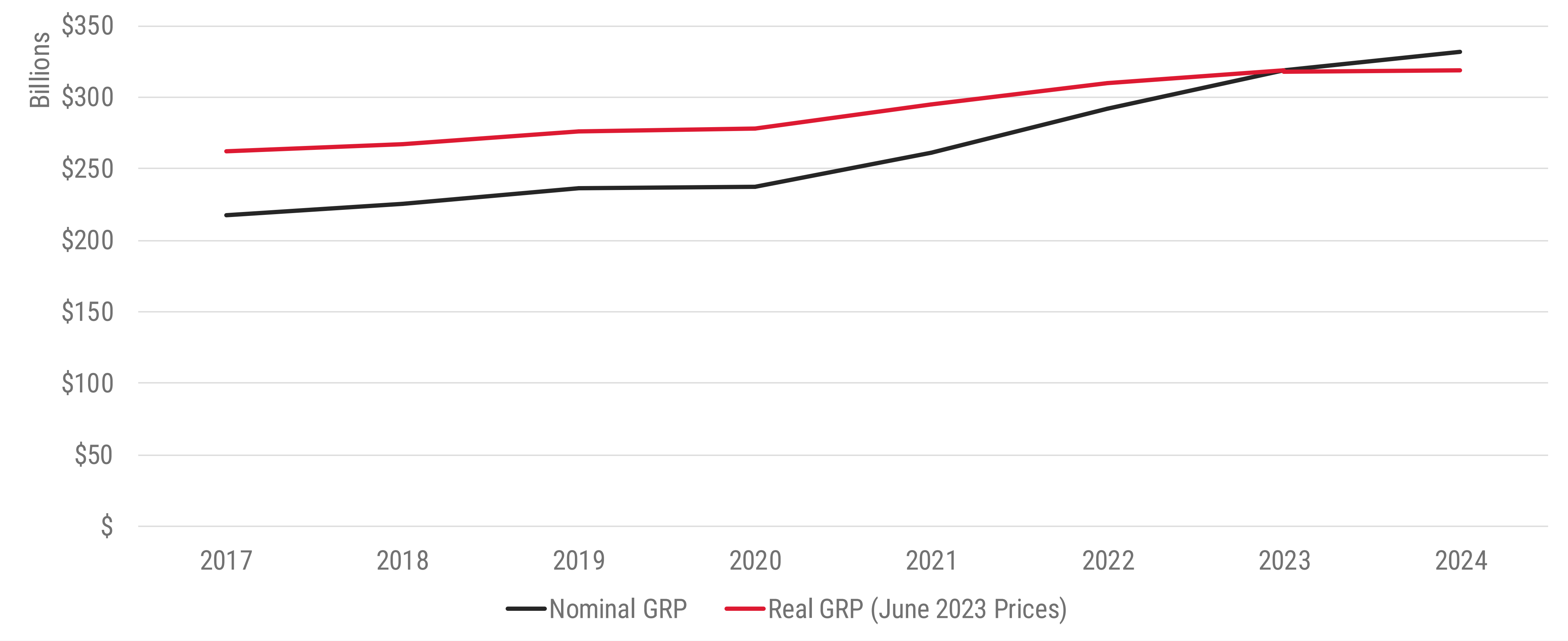


Source: REMPLAN Housing.



EMPLOYMENT & INDUSTRY
(THE LITE VERSION)

IN 2024 THE NATIONAL GROWTH AREAS ALLIANCE'S GRP WAS ESTIMATED AT $331.346B



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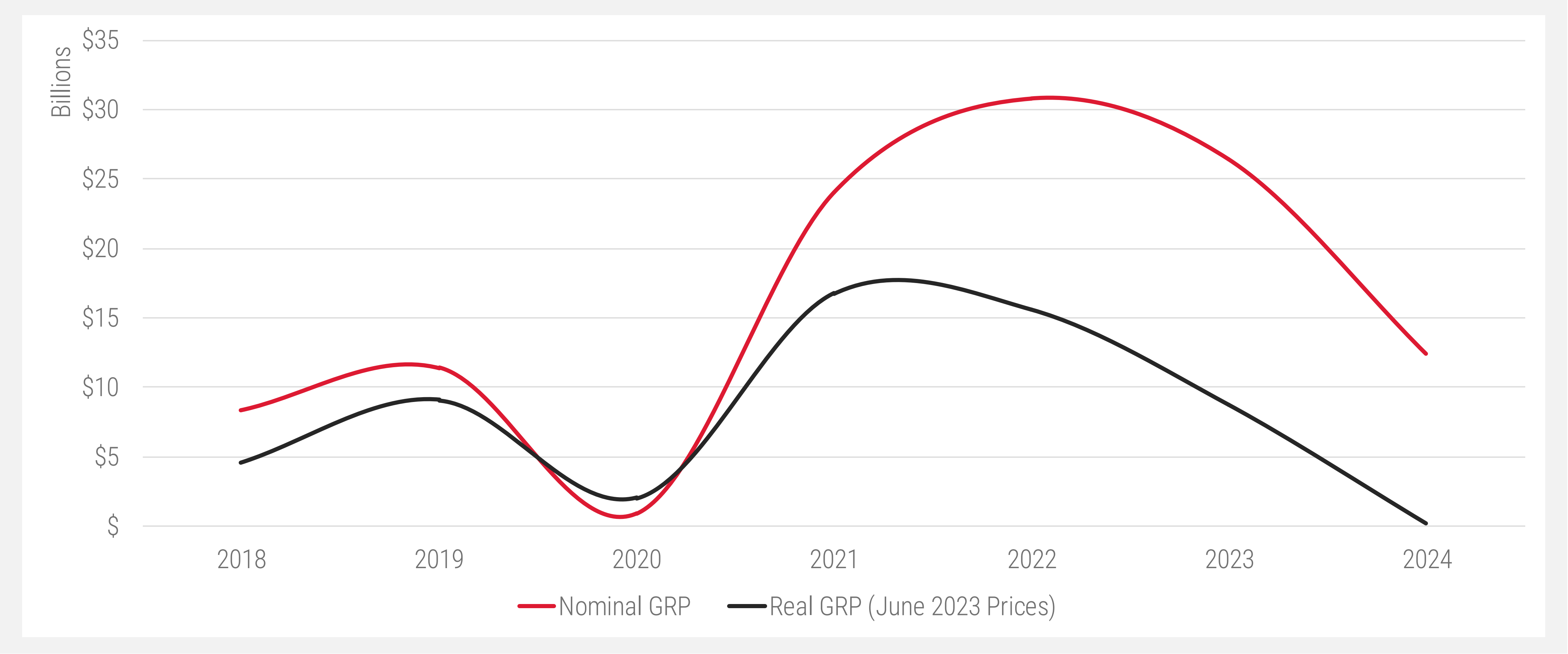
DESPITE GROWTH, THE IMPACT OF A SHRINKING ECONOMIC BASE IS BEING FELT IN THE NGAA



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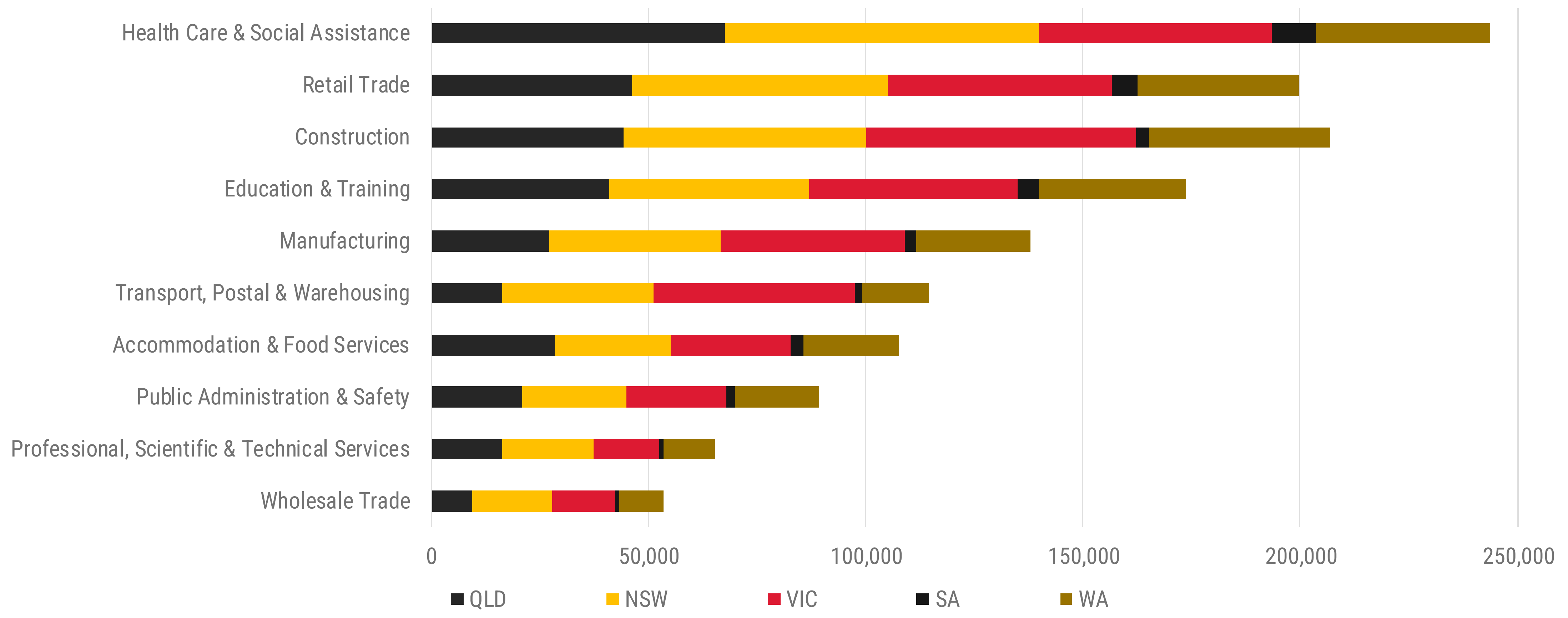
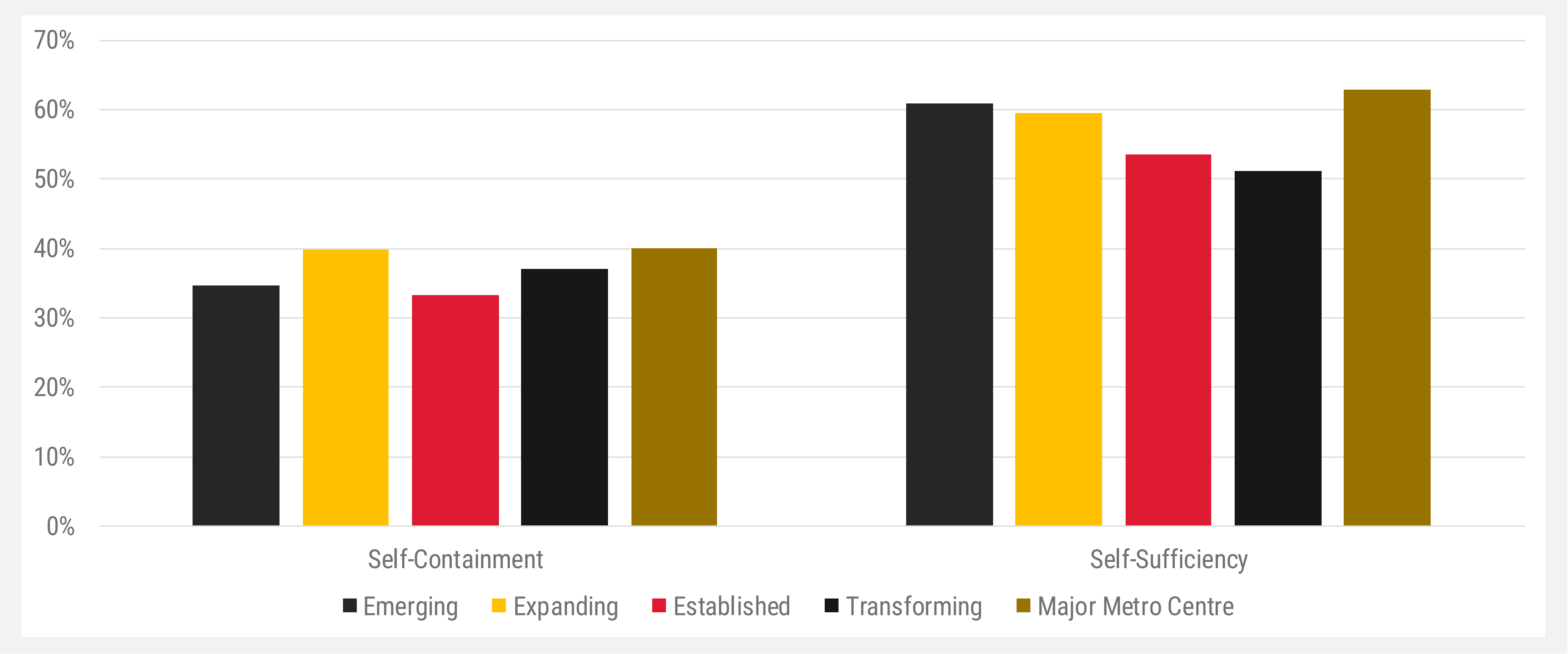
TOP 10 EMPLOYING SECTORS ACROSS THE NGAA



LOCAL JOB SELF CONTAINMENT & SUFFICIENCY

COMPARABLE TO NATIONAL RATES
SHOULD THEY BE HIGHER LIKE A REGIONAL CENTRE WITH GREATER ECONOMIC DIVERSITY?



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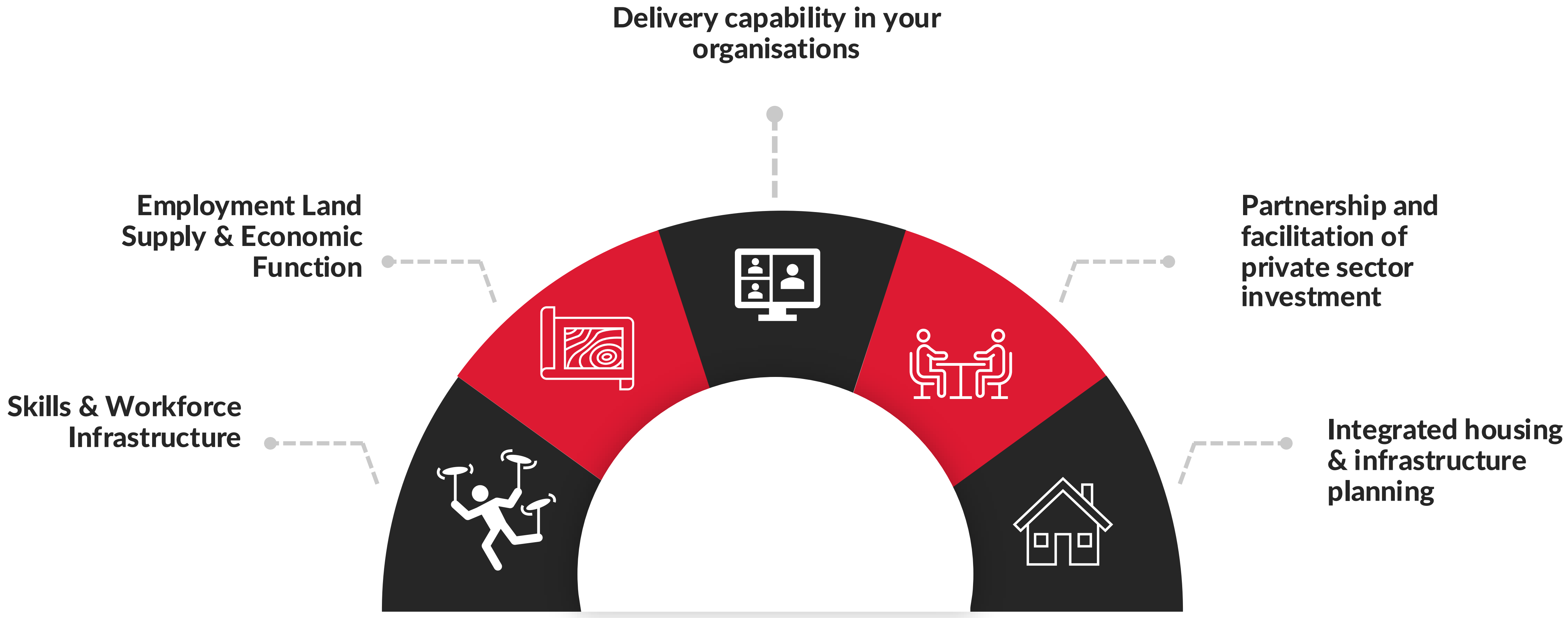
AREAS TO REVIEW AND INVEST

If the NGAA is expected to deliver 30–50% of the nation's new housing, you need to work on multiple levers. Skilled workers, employment precincts, serviced land, delivery capacity, and private market certainty.



SKILLS & WORKFORCE INFRASTRUCTURE

Fast-growing communities must also be fast-learning communities.

Review the availability of TAFE campuses, trade training hubs, and allied health/aged care skilling in growth corridors.

Major housing LGAs like Wyndham or Camden have <1 tertiary education site per 50,000 residents.

Image: Rockingham City Council

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EMPLOYMENT LAND SUPPLY

Housing without jobs is sprawl. Jobs without land is stagnation.

Map industrial/employment land by zoning, servicing status, and alignment to national industry priorities (e.g. clean energy, logistics, manufacturing).

Metric: Many LGAs (e.g. Melton, Ipswich) report <10 years' zoned and serviced industrial land supply and are under pressure to support housing targets.

Image: City of Penrith

DELIVERY CAPABILITY IN YOUR ORGANISATIONS

Can we deliver 50% of the nation's housing with 20th-century systems.

Audit resourcing of LGA planning and capital works teams. Advocate for funding models linked to capability uplift. Invest in systems, data and regional interoperability.

Some growth area councils are managing 10x growth with the same staff as stable inner-metro peers.

Image: Hume City Council

PRIVATE SECTOR PARTNERS(?)

Government sets the target, but the market takes the risk.

Identify local regulatory blockers (e.g. DA timelines, infrastructure contributions) and propose accelerators (e.g. land aggregation, pre-approvals, availability payments).

Greenfield development financing timelines have doubled since 2020 in some corridors due to cost and risk shifts. National shortage of LG skills (eg. Planners) needs investment be addressed.

Image: Mt. Barker District Council

INTEGRATED HOUSING & INFRASTRUCTURE PLANNING

We don't just need more housing—we need the right housing, in the right place, with the right services.

Co-design a new planning model: e.g. Growth Area Investment Agreements, or a shared infrastructure-readiness index. Leverage AAA Credit Rating of the sector?

Accord target = 240,000 homes/year, but <50% of that is currently aligned with committed infrastructure funding.

Image: City of Moreton Bay

INSIGHTS FOR HOUSING DELIVERY IN NGAA

- **Growth Areas Carry Disproportionate Housing Burden** – expectation of 30 to 50% of housing targets often without commensurate infrastructure or service provision.
- **Shifting Toward Density and Diversity challenges** market appetitive and construction sector capability. The Accord includes a policy expectation to increase medium- and higher-density housing near jobs, education, and transport. This shift challenges historical development models in growth areas.
- **Private Sector Delivery Needs Certainty and Incentives.** Most growth area housing is delivered by private developers, yet market constraints (interest rates, build costs, risk) are major factors in terms of delivery. Are the incentives (e.g. Housing Support Program, streamlined approvals, value capture) enough?
- **Affordable and Social Housing Undersupplied in Outer Areas.** Despite rapid growth, many outer-metropolitan LGAs have very limited stock of affordable or social housing. Under the Accord, jurisdictions must integrate these into future developments—posing coordination and funding challenges, especially in areas dominated by private estates.
- **Mismatch Between Population Growth and LGA Capability.** Many of the fastest-growing LGAs are struggling with resourcing and planning degree enrolments are low. Meeting Accord targets will require state-level coordination, cross-LGA partnerships, and capacity funding to support delivery.

THANK YOU

1300 737 443

info@remplan.com.au

www.remplan.com.au