



The impacts of Heritage Conservation Areas on housing delivery in Sydney

A call for reform

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Executive summary

NSW faces a significant housing supply challenge amid growing demand for well-located housing. While recent planning reforms are intended to increase housing delivery, providing sufficient housing for the State's current and future population remains a major challenge.

A largely overlooked component of the planning system in this context is Heritage Conservation Areas (HCAs).

HCAs now cover substantial parts of many inner-Sydney Local Government Areas, particularly in locations with strong access to jobs, transport and infrastructure. In practice, HCA controls often limit redevelopment, constrain density uplift and restrict the delivery of new housing in some of the most well-serviced parts of the city. Arguably, many of the HCAs exacerbate problems of efficiency, equity and access for everybody except those who live within the vicinity of that HCA.

State level guidance on the identification, application and review of HCAs is both limited and outdated. While heritage can deliver recognised social and economic benefits, the cost of HCAs on housing supply, affordability, and lost development potential in NSW is under-examined. The costs and benefits of HCAs are not systematically considered in planning policy decisions that shape how Sydney grows and changes over time.

This paper argues there are opportunities available to government to address many of the challenges HCAs pose that could build greater balance, transparency and accountability to HCA policy in NSW. A systematic, state-led review of HCAs is needed to establish clearer and more consistent criteria, supported by a stronger evidence base across both local and state planning contexts. Introducing a regular review framework would help ensure HCAs remain justified over time and responsive to evolving state priorities. Strengthening governance and oversight arrangements would also help better align local heritage decision-making with broader state-wide housing and infrastructure objectives.

Reforms to HCA policy should ensure heritage conservation remains credible, transparent and aligned with the needs of a growing state. NSW has an opportunity to modernise its approach to HCAs so that the planning system can both protect places of genuine heritage significance and support the delivery of more housing where it is needed most.





Policy opportunities – at a glance

1 Conduct a comprehensive, state-led review of all HCAs

Audit all HCAs across the state to document their location, scale, zoning and heritage values, assess consistency across councils, and evaluate whether current designations align with state priorities such as housing delivery, infrastructure use and future population and demographic change.

2 Create a central, publicly accessible HCA database

Develop a spatially enabled, state-wide register to make information on HCAs transparent, allowing policymakers, communities and developers to understand what is protected, and why.

3 Introduce mandatory, evidence-based impact assessments and regular reviews

Require all new and existing HCAs to undergo formal assessments of their impacts on housing supply and affordability, infrastructure costs, equity, demographic trends and environmental outcomes, with statutory reviews undertaken every five to ten years.

4 Clarify heritage criteria and unlock housing on low-value sites

Establish clear, consistent criteria to distinguish genuine heritage value from neighbourhood character and allow more housing “as of right” on non-contributory sites within HCAs, ensuring heritage protection does not freeze entire neighbourhoods in time.

5 Strengthen oversight and governance

Strengthen governance and oversight of HCA decisions to ensure they do not undermine broader state objectives, including through regional or state-level review panels in high-demand areas.



Introduction

Australia is managing one of the greatest social policy challenges in its history. The housing challenges in Australia – and NSW – have been building for decades.¹ There are complex demographic, macroeconomic and microeconomic drivers at play, including land availability, development controls, taxation incentives, market conditions and migration. However, at its core, the housing crisis is an issue of supply and demand that has impacted housing affordability over a long period of time.

The housing system should deliver the quantity and diversity of homes that Australians need. Currently, it is not meeting this goal and is not expected to over the period of the National Housing Accord.²

This housing affordability challenge is being addressed across all levels of government, with the Federal Government announcing the National Housing Accord in 2022 which saw the NSW Government commit to delivering 377,000 new homes by 2029.³

In August 2023, the National Cabinet announced the National Planning Reform Blueprint, which highlights that “a more efficient and effective planning and approvals process is one component of the reform needed to address Australia’s housing challenges”.⁴ The National Cabinet agreed ten measures around planning, zoning and land release to improve housing supply and affordability.⁵ What these measures amount to is the requirement for each state government to examine their planning systems to identify where there are opportunities for policy and systems change and improvements to deliver more housing.

The NSW Government has made a range of changes to the planning system as part of this commitment, including “reforms to improve assessment timeframes, reduce red tape, eliminate double handling and fast-track projects that deliver great public benefits, create jobs and keep the economy moving”.⁶ They have delivered a range of policy reforms to support housing in well-located areas, including:

- The Transport Oriented Development Program
- The Low and Mid-Rise Housing Policy
- The Housing Delivery Authority
- Releasing five-year housing targets for 43 councils
- Establishing the NSW Housing Taskforce
- Changes to the State Environmental Planning Policy (Housing) 2021 to support the development of affordable and diverse homes
- Introduction of the NSW Housing Pattern Book

Despite this, recent analysis indicates that it is unlikely that the National Housing Accord target will be met in NSW. The Urban Development Institute of Australia estimates that NSW is facing a dwelling shortfall of at least 115,000 homes during the accord period.⁷

Given the scale of the housing challenge, no aspect of the NSW planning system should be off the table for review, including the way heritage and Heritage Conservation Areas (HCAs) are identified, managed and considered.



What is a Heritage Conservation Area in NSW?

An HCA is a specific zoning reference to land identified as a “Heritage Conservation Area – General” in the Standard Instrument Local Environmental Plan (2006 EPI 155a). It excludes all other heritage classifications (Aboriginal Object, Aboriginal – Place of Heritage Significance, Heritage Conservation Area – Aboriginal, Heritage Conservation Area – Archaeological, Heritage Conservation Area – Landscape, Item – Aboriginal, Item – Archaeological, Item – General, Item – Landscape, Local Heritage – Archaeological, Local Heritage – General).

Where they are in place, HCAs prevent changes to permissibility and density, limiting rezoning for denser residential development typologies and reducing the capacity for landowners or developers to make additional housing available in these locations for current and future populations.



Costs and Benefits of HCAs

The NSW Productivity and Equality Commission outlines that, while Sydney has an extensive system of heritage protection already in place, “preserving the city’s heritage should not prevent our cities from meeting the needs of their current and future residents”.⁸

This requires the costs and benefits of HCAs to be better understood. In the case of HCAs, it requires the difficult task of weighing up intangible benefits, such as emotional connections and values to heritage, against the costs of HCAs to matters such as housing supply. Any changes or trade-offs should be clearly articulated, backed up by evidence and strategically made.

The social, economic and environmental benefits of heritage are well documented in academic literature, both internationally and locally. Heritage holds great cultural and educational value, contributes to tourism and plays an important role in shaping the identity and character of places.

However, the benefits and costs of HCAs to the broader NSW community are not as well understood. There is a lack of research on the impacts that HCAs may have on:

- the housing market and affordability, including housing supply, types and choice, costs and rents
- infrastructure requirements, including transport, water and wastewater, energy, communications, healthcare and education
- the physical environment, including pollution, congestion, energy use and land clearing
- equity and social demographics, including social inclusion or exclusion and intergenerational equity
- labour markets, including land for, and access to, jobs and services.

In NSW, local governments primarily identify HCAs using the non-statutory Local Government Heritage Guidelines 2002 issued by the NSW Heritage Office (now part of Environment and Heritage within the NSW Department of Climate Change, Energy, the Environment and Water). These guidelines focus largely on conserving and protecting heritage, with limited guidance on strategic trade-offs or other important state priorities.

This has resulted in a disconnect between HCA listings, made at the local level and in the interests of local communities, and the impact that they have on housing delivery and wider housing priorities of the NSW Government.



Impacts of HCAs on housing supply

There is limited published evidence on the impacts of HCAs on housing delivery and housing costs in NSW, the loss of development potential from listing HCAs or the consequences of heritage listings on other social and environmental priorities.

Given that the NSW Planning System is based on the premise of weighing up the social, environmental and economic impacts of land-use and development, without access to this data around HCAs, there is limited ability for informed strategic decision-making around trade-offs in land use.

The proportion of land affected by HCAs generally increases with proximity to Sydney CBD.

There are around 936 “Heritage Conservation Areas – General Heritage” in NSW. However, the application and number of HCAs in NSW are not evenly distributed with more than half located within Greater Sydney.

Table 1 | Distribution of HCAs in NSW

	Number of HCAs	Total area of HCAs (sq km)	HCA % share of LGAs by area
State	936	1504.48	0.2%
Sydney	581	1502.56	0.4%
Eastern Harbour City⁹	446	61.49	4.0%
Top 10 LGAs¹⁰ (by % HCA)	319	44.12	25.3%
Top 5 LGAs¹¹ (by % HCA)	233	29.36	32.7%
Hunters Hill	(4)	(2.53)	(45.1%)
City of Sydney	(76)	(10.11)	(38.2%)
Inner West	(112)	(11.16)	(31.7%)
North Sydney	(26)	(2.64)	(25.2%)
Woollahra	(15)	(2.91)	(23.8%)

Within Sydney, the geography of heritage listings, including HCAs, is clearly contrasted between inner and outer suburbs and broadly correlates with the socioeconomic status of those suburbs.¹² HCAs are typically more common and cover more land in well-located Local Government Areas (LGAs) that have better access to jobs, public transport and public amenity than other LGAs in Sydney.

In general, councils closer to the Sydney CBD have more HCAs that cover more land. Approximately 33 per cent of land in the LGAs of Hunters Hill, City of Sydney, Inner West, North Sydney and Woollahra is covered by HCAs.

HCAs are disproportionately concentrated in well-serviced inner city LGAs, where stringent development controls limit density and redevelopment. Analysis indicates that these settings have resulted in substantial lost housing capacity, contributed to uneven population growth and shifted housing pressure to outer and less well-serviced areas of the city, raising concerns about equity and infrastructure efficiency.



Some of this can be explained by historic development patterns as the city has changed and grown over time, including the support for greenfield development on the urban fringe by successive state governments.

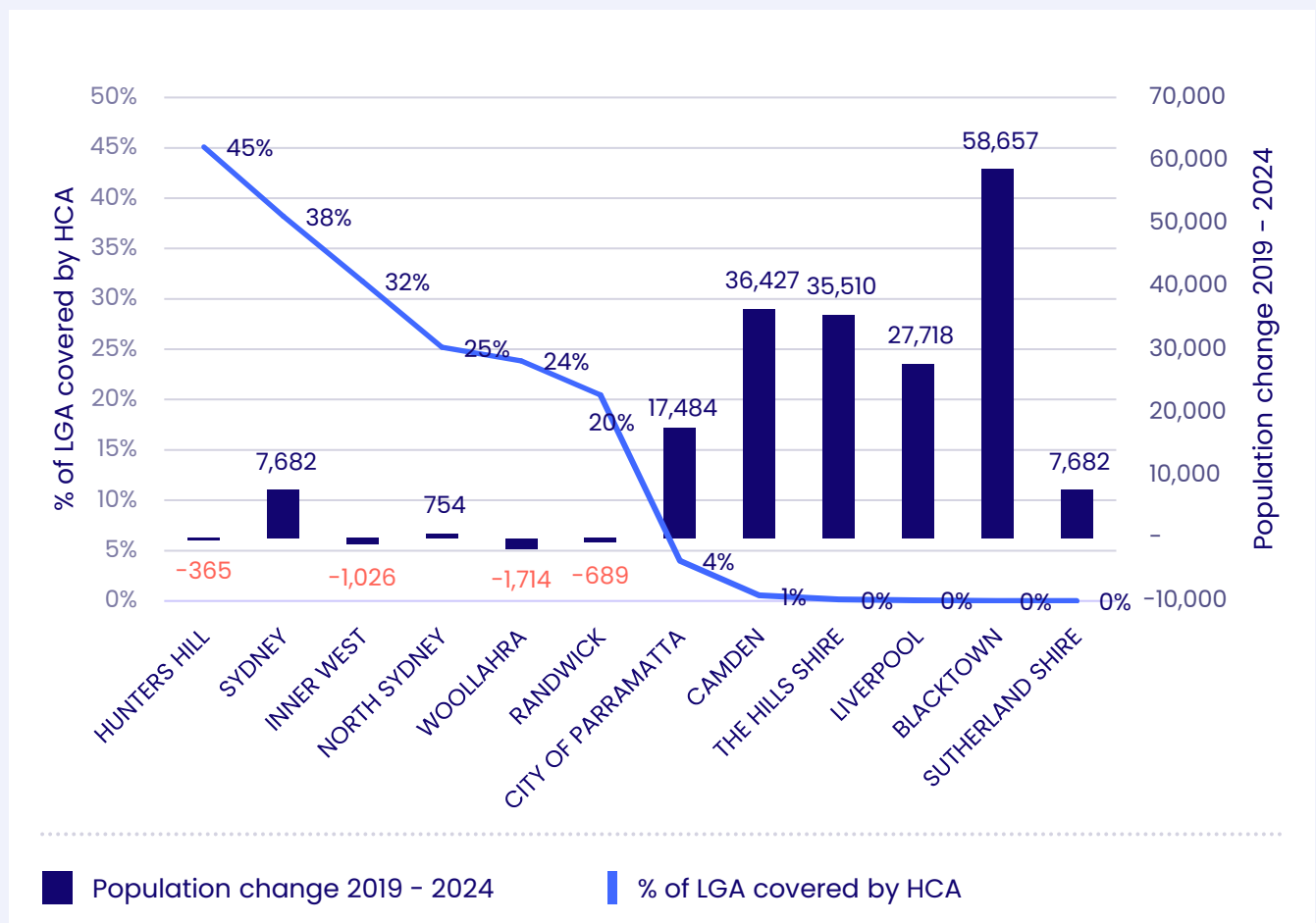
There is a correlation between the amount of land covered by HCAs and population change within LGAs since 2019.

ABS data indicates that the suburbs with the highest percentage of HCA coverage do not contribute to the delivery of new housing in the same way as suburbs with less HCA coverage (see Graph 1).

There is a clear correlation between more stringent zoning and development controls, such as those applied as a result of a HCA layer, and limited population growth. Since 2019, LGAs outside of the inner city – in the middle rings and on the urban fringe – grew rapidly. However, three of the five LGAs with the most HCAs saw population decline during this period, including Hunters Hill, Inner West and Woollahra.

Between 2019 and 2024, these five LGAs accounted for 1.2 per cent of the population growth of the State and 1.8 per cent of the population growth in Sydney, with the population in Hunters Hill decreasing by 2.5 per cent, Inner West by 0.5 per cent and Woollahra by 3.0 per cent (see Table 2).

Graph 1 | LGA HCA coverage and population change, 2019–2024.





Additionally, over 15 per cent of land in these five LGAs is zoned R1 General Residential or R2 Low-density Residential and has an HCA overlay. This results in low-density areas in these LGAs remaining so in perpetuity, largely due to additional heritage considerations and more stringent development controls.

Table 2 | LGA population change 2019–2024.

	2019	2024	Total change
Hunters Hill	14,427	14,062	-365
City of Sydney	229,596	237,278	7,682
Inner West	191,965	190,939	-1,026
North Sydney	72,155	72,909	754
Woollahra	56,892	55,175	-1,717
TOTAL	565,035	570,363	5,328

The benefits of this are felt most acutely by the local community in which the HCA is located, with residents experiencing limited change in their community and greater amenity afforded by lower densities, while the costs are largely borne across Greater Sydney and the state where the impacts of housing a growing population are most felt.

Lost development potential from HCAs is significant

The scale of the impacts of HCAs on housing supply within the LGAs of Hunters Hill, City of Sydney, Inner West, North Sydney and Woollahra is significant. Lost development potential from the HCA layer is estimated at 84,771 additional homes (Annex A).

The City of Sydney and Inner West make up the majority of this lost development potential, with a feasible dwelling potential of 44,027 in the City of Sydney and 28,350 in the Inner West.

In four of the five councils with the most HCAs, the most significant lost development potential is within the R1 General Residential or R2 Low-density Residential Zones. Woollahra Council is the outlier, with the majority of the lost development potential (4,896 dwellings) being within the R3 Medium-density Residential Zone.

This analysis assumes the removal of the HCA layer, while retaining individual heritage items, and applying the state's Low and Mid-Rise and Transport Oriented Development planning controls to provide a baseline indicator of potential uplift in dwelling capacity. It also assumes no upzoning or master planning being undertaken – which could see feasibility of greater development significantly increase.



Summary of analysis

HCAs significantly constrain housing supply in well-located areas of Sydney.

HCAs are disproportionately concentrated in inner city Sydney LGAs and are subject to more stringent development controls. These restrictions limit changes to density and prevent rezoning and redevelopment opportunities in areas with strong access to jobs, transport and services, pushing Sydney's growth outwards rather than upwards.

The scale of lost housing capacity from HCAs is material and measurable.

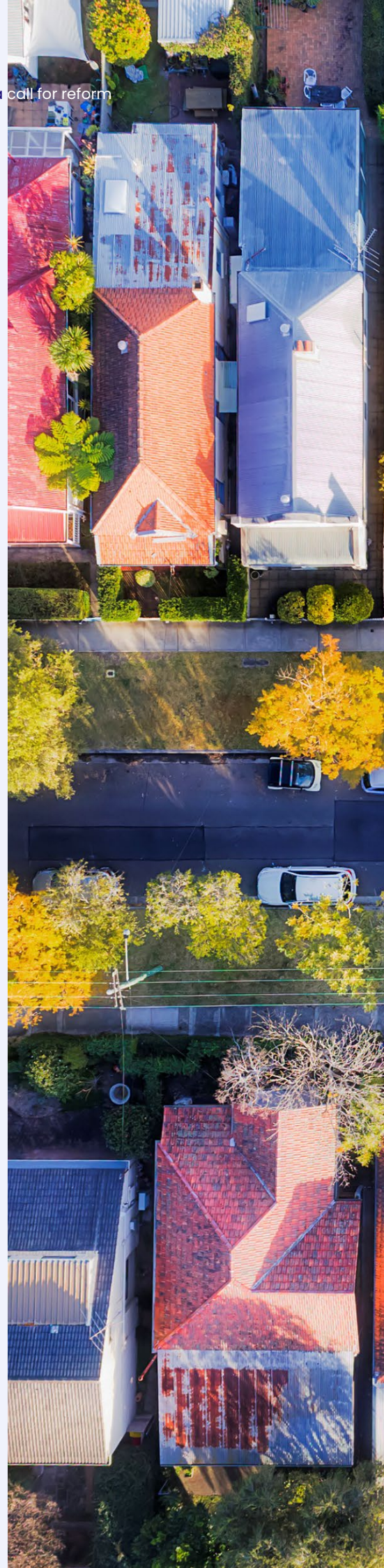
Removing HCA controls across the five most affected Sydney LGAs could unlock capacity for approximately 84,771 additional dwellings. These houses could be delivered within existing land use zones using existing development controls and state housing policies.

HCA policy is locally driven, inconsistent and poorly aligned with state priorities.

HCAs are identified primarily by local councils using outdated and non-statutory guidance. Criteria, weightings, and decision-making approaches vary significantly between LGAs, with little requirement to consider broader state objectives such as housing supply, affordability, equity or infrastructure efficiency.

The benefits of HCAs are well recognised but their costs are not systematically assessed.

While heritage protection delivers social, cultural, and economic benefits, there is limited NSW-specific evidence quantifying the costs of HCAs on housing affordability, infrastructure demand, labour markets or intergenerational equity. This prevents transparent trade-off analysis in planning decisions.





A policy reform agenda for NSW

If HCAs are to retain legitimacy in rapidly changing and growing cities, reform must address not whether heritage matters, but how it is balanced against other urgent policy priorities.

Addressing the state's housing crisis does not require the simple deregulation of planning controls or the broadscale removal of HCAs. What is required is a comprehensive, state-led reform agenda for HCAs that brings transparency, evidence and accountability into land use and planning decision-making.

Balancing housing supply with heritage conservation will require closer examination of how HCAs operate within the planning system. Reforming how we define, apply and reassess them is not a threat to HCAs, it is essential to their legitimacy in a state that continues to grow and change over time.

- 1 First, **the NSW Department of Planning, Housing and Infrastructure should undertake a systematic, state-led review of all HCAs.** This should include a full audit cataloguing where HCAs are located, how large they are, what zoning applies, what heritage values are being protected and why the listing exists at all. It should also assess consistency across councils and evaluate whether HCA designations align with state priorities such as housing delivery, infrastructure provision and demographic change.
- 2 Second, **this information should be made public through a centralised, accessible database.** A spatially enabled register, potentially building on the NSW Planning Portal – Spatial Viewer, would allow policymakers, communities and developers to understand what is protected, on what basis and with what implications. Transparency is essential for informed debate about trade-offs.
- 3 Third, **NSW could introduce mandatory, evidence-based impact assessments for all new and existing HCA listings.** These assessments should explicitly consider impacts on housing supply and affordability, including their impact on housing targets, infrastructure costs, social equity, demographic change and environmental outcomes. Heritage decisions should not be exempt from the same rigour applied elsewhere in the planning system. A statutory requirement to periodically review all HCAs every five to ten years would ensure that HCAs remain justified over time rather than becoming permanent planning constraints by default.
- 4 Fourth, **clear, consistent criteria must distinguish genuine heritage value from broader notions of neighbourhood character.** Where sites within HCAs make little or no contribution to heritage value, more housing should be allowed “as of right”. Protecting heritage does not require freezing entire neighbourhoods in time.
- 5 Finally, **stronger oversight is required to ensure that local decisions do not undermine broader state objectives.** Improved governance is required to ensure that local planning decisions do not undermine broader state objectives, particularly in high demand, well located areas where housing pressure is most acute. The establishment of regional or state level review panels for HCAs could help ensure decisions reflect both local values and broader state-wide needs.

These reforms support heritage protection that is transparent, evidence-based and responsive to the state's housing needs. It will also allow communities to be better involved in discussions about the real trade-offs between heritage protection and housing delivery.

By embedding evidence, transparency and regular review into HCA policy, NSW can better manage conserving its past and building its future.



Conclusion

HCAs are a defining feature of many of Sydney's most established suburbs and reflect the social, cultural and architectural history that shapes the city's identity. However, the current application and management of HCAs by local governments is no longer fit for purpose. While the benefits of heritage protection are widely acknowledged, the costs associated with HCAs, particularly their impact on housing supply, affordability, equity and infrastructure efficiency, remain underexamined. This constrains balanced and effective planning, particularly in the context of a housing crisis and rapid demographic change.

This paper does not argue for the abandonment of HCAs, nor does it suggest that heritage values are not an important consideration in planning decisions. Rather, it makes the case to restore balance, transparency and accountability to HCA policy.

A systematic, state-led review of HCAs is necessary to introduce clear criteria, robust evidence across both local government and state-wide consideration. A regular review process of the HCA policy framework is essential to ensure HCAs remain justified over time and aligned with changing state priorities. Improving governance and oversight would further help reconcile local decision-making with state-wide priorities.

Looking ahead, there is a clear need for further research to better quantify the social, economic and environmental trade-offs associated with HCAs, including their impacts on housing affordability and infrastructure costs. By modernising how HCAs are defined, applied and reviewed, NSW can protect what genuinely matters from its past, while creating the capacity needed to house its present and future populations.





Annex A | Lost Development Potential Data

Data limitation:

- This analysis should be viewed as a baseline indicator of potential uplift in dwelling capacity—assuming the removal of the HCA while retaining individual heritage items.
- Results presented are based on a highest and best use analysis, reflecting the maximum number of dwellings permissible under current planning controls.
- Applying Low and Mid-Rise (LMR) and Transport-Oriented Development (TOD) planning controls to these areas presents several challenges and limitations, particularly when estimating dwelling capacity. This complexity arises from the range of permissible dwelling types within the same zone, which vary depending on proximity to designated LMR areas. For example, different Floor Space Ratios (FSRs) and Height of Buildings (HoBs) apply within the same zone depending on whether the site falls within the inner area (within 400m) or the outer area (400m to 800m).
- Further complicating the analysis are additional planning controls, such as minimum lot sizes and frontage requirements, which differ across dwelling types like dual occupancies, manor houses, townhouses and residential flat buildings (RFBs) within the R1 to R4 zones.
- Given the diversity of controls, a detailed, zone-by-zone analysis would be required to produce more accurate results.



HUNTERS HILL LGA

Hunters Hill - Heritage Conservation Area (excl. Heritage Items)

ZONE/DWELLING TYPE	PROPERTY COUNT	EXISTING DWELLINGS	TOTAL AREA (SQM)	NET CAPACITY - BASELINE - HCA removed current controls	NET CAPACITY - LMR/ TOD CONTROLS
C2	5	5	14,103		
No development	5	5	14,103		
E1	18	19	9,317	89	89
4 Storey Apartment	12	7	7,550	89	89
No development	6	12	1,768		
MU1	42	87	15,325	116	164
4 Storey apartment	5	2	1,449	8	5
5-6 Storey apartment	20	16	6,776	108	159
No development	17	69	7,100		
R2	1208	1426	931,946	389	902
Detached housing	11	11	21,839	11	
Dual occupancy	380	382	397,643	378	138
Manor house					156
Townhouses					608
No development	817	1033	512,464		
R3	113	417	99,189	271	273
Townhouses	2	2	822	0	-
4 Storey apartment	77	76	38,090	271	273
No development	34	339	60,277		
RE1	30	29	95,882		
No development	30	29	95,882		
RE2	6	5	20,286		
No development	6	5	20,286		
SP2	15	14	83,524		
No development	15	14	83,524		
W4	3	2	1,778		
No development	3	2	1,778		
TOTAL	1440	2004	1,271,350	865	1,428



CITY OF SYDNEY LGA

City of Sydney – Heritage Conservation Area (excl. Heritage Items)

ZONE/DWELLING TYPE	PROPERTY COUNT	EXISTING DWELLINGS	TOTAL AREA (SQM)	NET CAPACITY – BASELINE – HCA removed current controls	NET CAPACITY – LMR/ TOD CONTROLS
D	1	1	111		
No development	1	1	111		
E	5	3	4,882		
No development	5	3	4,882		
E1	830	4,058	212,601	937	1,416
4 Storey apartment	31	15	22,350	341	6
5-6 Storey apartment	15	198	9,178	90	86
7-8 Storey apartment	5	463	6,265	38	842
9-20 Storey apartment	3	189	4,138	109	127
21-40 Storey apartment	4	2	3,610	359	355
No development	772	3,191	167,061		
E3	44	40	54,372		
No development	44	40	54,372		
G	1	1	111		
No development	1	1	111		
H	5	3	4,882		
No development	5	3	4,882		
E1	830	4,058	212,601		
4 Storey apartment	31	15	22,350		
5-6 Storey apartment	15	198	9,178		
7-8 Storey apartment	5	463	6,265		
9-20 Storey apartment	3	189	4,138		
21-40 Storey apartment	4	2	3,610		
No development	772	3,191	167,061		
E3	44	40	54,372		
No development	44	40	54,372		
G	2	2	88,127		
No development	2	2	88,127		
H	1	1	6,790		
No development	1	1	6,790		
MU1	2,516	12,532	756,385	4,631	5,018
21-40 Storey apartment	6	121	13,953	1,442	1,550
4 Storey apartment	138	525	105,503	995	1,110
5-6 Storey apartment	66	878	84,787	1,250	1,328
7-8 Storey apartment	8	646	10,975	90	100
9-20 Storey apartment	16	941	29,911	854	930
No development	2,282	9,421	511,256		



CITY OF SYDNEY LGA

City of Sydney – Heritage Conservation Area (excl. Heritage Items)

ZONE/DWELLING TYPE	PROPERTY COUNT	EXISTING DWELLINGS	TOTAL AREA (SQM)	NET CAPACITY – BASELINE – HCA removed current controls	NET CAPACITY – LMR/ TOD CONTROLS
R1	13,477	26,599	2,589,207	3,763	37,181
Attached housing	1	1	1,106	2	
Detached housing	2	2	3,230	6	30,882
Manor house	137	144	63,256	414	58
Townhouses	11,068	11,515	1,649,252	33	27
4 Storey apartment	207	901	189,444	2,002	1,092
5-6 Storey apartment	42	1,172	49,474	402	4,437
7-8 Storey apartment	17	1,056	29,793	186	186
9-20 Storey apartment	7	352	9,164	186	273
21-40 Storey apartment	4	3	4,186	532	226
No development	1,992	11,453	590,304		
R2	34	36	27,489	407	412
4 Storey apartment	29	29	24,050	138	143
21-40 Storey apartment	2	2	2,121	269	269
No development	3	5	1,318		
R3	1	35	1,289		
No development	1	35	1,289		
RE1	253	561	766,419		
No development	253	561	766,419		
SP2	210	197	190,254		
No development	210	197	190,254		
SP5	1	1	1,604		
No development	1	1	1,604		
Not zoned	45	525	43,491		
No development	45	525	43,491		
TOTAL	17,420	44,591	4,743,021	9,738	44,027



INNER WEST LGA

Inner West – Heritage Conservation Area (excludes Heritage Items)

ZONE/DWELLING TYPE	PROPERTY COUNT	EXISTING DWELLINGS	TOTAL AREA (SQM)	NET CAPACITY – BASELINE – HCA removed current controls	NET CAPACITY – LMR/ TOD CONTROLS
B2	52	75	16,199		
No development	52	75	16,199		
B4	1	-	702		
No development	1	-	702		
B5	14	13	2,485		
No development	14	13	2,485		
E1	1,615	3,107	433,363	4,881	2,740
4 Storey apartment	6	8	2,761	664	19
5-6 Storey apartment	89	106	47,488	68	853
7-8 Storey apartment	151	93	84,172	4	1,824
9-20 Storey apartment				16	
21-40 Storey apartment	1	1	352	4,129	44
No development	1,368	2,899	298,590		
E3	13	36	10,902		
No development	13	36	10,902		
E4	44	43	48,454		
No development	44	43	48,454		
PAE	2	24	3,357		
No development	2	24	3,357		
R1	9,883	16,552	2,516,971	14,067	12,245
Attached housing	32	31	22,024	133	89
Detached housing	18	19	7,993	62	19
Manor house	173	172	85,451	752	520
Townhouses	6,132	6,134	1,034,118	-	3
4 Storey apartment	1,639	1,647	521,070	822	2,109
5-6 Storey apartment	540	534	195,405	1	2,485
7-8 Storey apartment	67	67	17,143	-	63
9-20 Storey apartment	134	136	29,537	1	1
21-40 Storey apartment	184	180	65,627	12,296	6,956
No development	964	7,632	538,602		
R2	10,172	12,729	3,710,039	105	13,139
Detached housing	2	2	2,112	105	2
Dual occupancy	82	87	43,668		78
Manor house	1,906	2,149	1,236,140		5,535
Townhouses	1,998	2,331	876,146		653
4 Storey apartment	204	207	95,703		416
5-6 Storey apartment	739	745	353,649		6,423
7-8 Storey apartment	2	1	1,454		32
No development	5,239	7,207	1,101,166		



INNER WEST LGA

Inner West – Heritage Conservation Area (excludes Heritage Items)

ZONE/DWELLING TYPE	PROPERTY COUNT	EXISTING DWELLINGS	TOTAL AREA (SQM)	NET CAPACITY – BASELINE – HCA removed current controls	NET CAPACITY – LMR/ TOD CONTROLS
R3	42	83	35,915	151	226
Manor house	6	6	3,011	24	18
Townhouses	1	1	130	-	-
4 Storey apartment	24	33	21,349	127	143
5-6 Storey apartment	6	14	3,523		65
No development	5	29	7,902		
R4	11	178	10,938		
No development	11	178	10,938		
RE1	276	263	559,158		
No development	276	263	559,158		
RE2	8	6	12,490		
No development	8	6	12,490		
SP2	129	141	231,338		
No development	129	141	231,338		
W4	2	2	1,373		
No development	2	2	1,373		
(blank)	74	133	54,103		
No development	74	133	54,103		
TOTAL	22,338	33,385	7,647,786	19,204	28,350



NORTH SYDNEY LGA

North Sydney – Heritage Conservation Area (excl Heritage Items)

ZONE/DWELLING TYPE	PROPERTY COUNT	EXISTING DWELLINGS	TOTAL AREA (SQM)	NET CAPACITY – BASELINE – HCA removed current controls	NET CAPACITY – LMR/ TOD CONTROLS
C2	1	1	11,232		
No development	1	1	11,232		
C4	49	56	41,569	39	39
Detached housing	36	6	6,121	6	6
Dual occupancy	37	37	31,996	33	33
No development	6	13	3,452		
E1	46	52	10,786	15	15
4 Storey apartment	3	2	1,479	15	15
No development	43	50	9,307		
E3	23	24	7,364	12	11
Manor house	1	1	646	3	3
Townhouses	18	13	5,427	9	8
No development	4	10	1,291		
MU1	10	37	6,134	534	534
21-40 Storey apartment	1	0	3,967	534	534
No development	9	37	2,167		
R2	2540	4293	1,020,036	267	3,284
Detached housing	11	10	14,426	22	
Dual occupancy	307	304	205,516	245	
Manor house					351
Townhouses					468
4 Storey apartment					2,465
No development	2222	3979	800,093		
R3	590	1512	238,979	147	373
Manor house	21	20	12,178	64	33
Townhouses	251	251	78,133	83	42
4 Storey apartment					110
5-6 Storey apartment					188
No Development	318	1241	148,668		
R4	116	1199	96,650	93	112
Townhouses	10	10	3,183	3	-
4 Storey apartment	7	7	5,398	90	112
No development	99	1182	88,069		
RE1	60	58	101,185		
No development	60	58	101,185		
RE2	3	3	1,114		
No development	3	3	1,114		
SP2	36	35	94,073		
No development	36	35	94,073		
Not Zoned	2	9	1,376		
No development	2	9	1,376		
TOTAL	3476	7279	1,630,497	1,107	4,368



WOOLLAHRA LGA

Woollahra – Heritage Conservation Area (excl Heritage Items)

ZONE/DWELLING TYPE	PROPERTY COUNT	EXISTING DWELLINGS	TOTAL AREA (SQM)	NET CAPACITY – BASELINE – HCA removed current controls	NET CAPACITY – LMR/ TOD CONTROLS
E1	109	140	27,902	86	275
4 Storey apartment	8	5	6,247	86	
5-6 Storey apartment					7
7-8 Storey apartment					268
No development	101	135	21,655		
MU1	325	384	59,250	54	63
4 Storey apartment	14	14	9,850	54	63
No development	311	370	49,400		
R2	4248	5278	738,384	429	1364
Attached housing	1	1	1,295	2	17
Detached housing	24	44	17,714	25	9
Dual occupancy	35	35	20,535	17	
Manor house					65
Townhouses					70
4 Storey apartment	52	179	40,009	379	617
5-6 Storey apartment	1	1	285	6	586
No development	4135	5018	658,546		
R3	1363	4939	628,178	1394	4896
Townhouses	611	676	119,363	4	9
4 Storey apartment	342	660	206,471	1184	872
5-6 Storey apartment	11	30	12,277	206	4015
No development	399	3573	290,066		
RE1	96	90	130,363		
No development	96	90	130,363		
RE2	8	6	76,685		
No development	8	6	76,685		
SP2	32	32	59,562		
No development	32	32	59,562		
SP3	4	3	5,804		
No development	4	3	5,804		
(blank)	1	1	2,540		
No development	1	1	2,540		
Total	6,186	10,873	1,728,669	1,963	6,598



Endnotes

- ¹ Brendan Coates, “State of the nation: Tackling Australia’s housing crisis”, *Architecture Australia*, 17 June 2025, <https://architectureau.com/articles/state-of-the-nation-tackling-australias-housing-crisis/>.
- ² National Housing and Supply and Affordability Council, *State of the Housing System 2025* (Canberra: Australian Government, 2025).
- ³ NSW Department of Planning, Housing and Infrastructure, Housing Targets: Frequently Asked Questions, <https://www.planning.nsw.gov.au/policy-and-legislation/housing/housing-targets/frequently-asked-questions-housing-targets> (accessed 13 July 2025).
- ⁴ Department of the Treasury of Australia, *National Planning Reform Blueprint* (Canberra: Australian Government, 2024).
- ⁵ Ibid.
- ⁶ NSW Department of Planning, Housing and Infrastructure, Planning Reforms, <https://www.planning.nsw.gov.au/policy-and-legislation/planning-reforms> (accessed 19 July 2025).
- ⁷ Urban Development Institute of Australia, “New UDIA research reports on NSW’s progress in meeting the Housing Accord”, Urban Development Institute of Australia, 30 January 2026, <https://www.udiansw.com.au/new-udia-research-reports-on-nsws-progress-in-meeting-the-housing-accord/>.
- ⁸ NSW Productivity Commission, *What we gain by building more homes in the right places* (Sydney: NSW Government, 2024).
- ⁹ Eastern Harbour City includes in the LGAs of: Bayside, Burwood, Canada Bay, Hornsby, Hunters Hill, Inner West, Ku-Ring-Gai, Lane Cove, Mosman, North Sydney, Northern Beaches, Randwick, Ryde, Strathfield, Southerland, City of Sydney, Waverly, Willoughby and Woollahra.
- ¹⁰ Top 10 LGAs by percentage of land HCA: Hunters Hill, City of Sydney, Inner West, North Sydney, Woollahra, Randwick, Willoughby, Waverly, Burwood, Mosman.
- ¹¹ Top 5 LGAs by percentage land HCA: Hunters Hill, City of Sydney, Inner West, North Sydney, Woollahra.
- ¹² Nigel Gladstone and Tawar Razaghi, “‘Difficult trade-offs’: Sydney neighbourhoods with the most heritage homes”, *The Sydney Morning Herald*, 19 September 2022, <https://www.smh.com.au/property/news/difficult-trade-offs-sydney-neighbourhoods-with-the-most-heritage-homes-20220914-p5bi2l.html>.



Good public policy starts with evidence.

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