

The impact of zoning on land values: Brisbane example reviewed

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Abstract

A constrained urban land supply through the vehicle of zoning has been identified as increasing urban land values because the lack of options for development land means original landowners can hold out for better offers. Competitive urban land markets are seen as an important part of better supporting housing affordability because they aim to provide enough development options so that landowners cannot extract 'excessive' or 'scarcity' rents.

Measures such as the 'zoning effect' and 'zoning premium' have been modelled and estimated to assess the impact of zoning on land values. Kendall and Tulip's 'zoning effect' is difficult to relate to from a practical development economics perspective. Instead, the 'zoning premium', as estimated for new urban greenfield lots in Brisbane - for the recent 'Costs of Housing Regulation in Queensland' report, provides a useful example for review.

The Centre for International Economics estimated a zoning premium of \$127,709 for new urban greenfield lots in Brisbane. This is based on the 2024 median lot sale price of \$417,000 and allows for development costs, a developer's risk/profit margin and an estimate of the value of equivalent land in rural use.

However, that estimate failed to take account of additional land costs (\$37,400) and additional infrastructure costs (\$30-45,000) that would be necessary to enable urban development on the compared rural land. Once those costs are considered and removed from the zoning premium, the remaining amount (\$45,309 – 60,309) is of a scale that can be largely explained by developed lot sales price escalation that might be assumed by a developer in justifying paying more for the land.

This finding is important as it provides a development economics rationale for the remaining zoning premium. Developers can only sensibly justify paying amounts for raw development land that still enable them to expect profitable development.

As a corollary, to the extent the assumed sales price appreciation occurs anyway due to demand side factors, e.g. population and income growth and lower interest rates, the impact of zoning can be seen as 'working with the market' to maximise raw land prices. Of course, to the extent the assumed sales price growth does not occur, this may result in delayed development, constraining developed lot supply and thus contributing to price growth.

A similar review of other estimates of the zoning premium would be warranted to better understand the impacts of zoning on land values. Such findings can better inform any trade-offs that might be considered in balancing the benefits of planned land supplies against the apparent costs they entail through less competitive urban land markets.

Introduction

This paper is motivated by an overarching objective to better understand the role of land use planning, and particularly the scope of planned supplies of land for development, in affecting the availability and cost of land for development and therefore housing affordability.

Competitive urban land markets have been identified as an objective to minimise land costs, through providing enough options for development so that landowners do not have the same scope to 'hold out' for a better offer, resulting in significantly higher land prices. Achieving

such land markets can be seen as counter to some aspects of land use planning, e.g. identifying specific areas for urban growth and densification, so it is important to understand the trade-offs of such an approach.

Restrictive zoning of land supplies available for development has been identified as generating a 'zoning effect' or 'zoning premium' which increases the cost of land and housing. Using an example for greenfield lots in Brisbane, this paper seeks to better explain the scale of and basis for such impacts on land values, to inform moves towards more competitive urban land markets.

The following sections:

- explain the concepts of competitive urban land markets;
- outline the 'zoning effect' and 'zoning premium' as measures of the impact of constrained or uncompetitive land markets on land values;
- describe in detail the 'zoning premium' for new Brisbane greenfield lots as estimated by The Centre for International Economics (CIE) for the recent 'Costs of Housing Regulation in Queensland' report; and
- provide an alternative explanation for the reported CIE greenfield 'zoning premium', considering:
 - additional land costs due to undevelopable land and that required for local roads, parks and drainage;
 - additional trunk infrastructure costs capitalised into the land value of urban zoned areas;
 - an indication of the role of assumed future developed lot sales price escalation in affecting raw development land values; and
 - the locational value of urban zoned versus compared rural land.

Concepts of competitive urban land markets

Competitive urban land markets are those where '...enough development options exist that landowners cannot extract excessive rents, because competition at the urban fringe and within established areas keeps prices grounded near the marginal opportunity cost of land...' (Blaschke 2026, p.6). Scarcity, extractive or excessive rents arise '...not from the inherent qualities of the land or from public investment, but from the artificial restriction of development opportunities by planning rules...' (Blaschke 2026, p.33).

In broad terms, 'rents' in this context refer to the price per unit area of land. It is the longstanding economic concept of land rent, as used to explain the location of different land uses, e.g. see Alonso (1965) and Barlowe (1986).

The reason that planning constraints on development opportunities, as reflected in zoning, may result in excessive rents is that landowners who hold scarce development rights have the option of holding out for a higher offer in the absence of a '...credible threat of entry.' (Blaschke 2026, e.g. p.9) of other lands to the market. The risk of handing '...monopoly powers to owners of urban designated land ...' to the detriment of housing affordability has been noted (Spiller and Forrest 2017, p.7). Limiting available options for urban development may increase competition by developers for that land, tending to increase the offer prices required to be successful in acquiring the land (Adams *et al.* 2009).

The 'marginal opportunity cost of land' for residential development, whether new urban development or higher density redevelopment, is determined by '...its next best alternative use...' (NZPC 2017, p.368). For new urban development on the urban fringe the next best alternative use is most likely some form of agriculture or perhaps hobby farming, while for higher density redevelopment in the existing urban area it is most likely individual houses.

In effect, a competitive urban land market is defined as one where the price of urban development land is near that of land for the next best alternative use. This is contrasted with circumstances where land zoned for urban or higher densities is significantly more valuable than land that is not so zoned (e.g. Kendall and Tulip 2018).

Estimation of scarcity rents

Examples of estimation of the 'scarcity rents' resulting from planning constraints on land supply include the 'zoning effect' (Kendall and Tulip 2018) and 'zoning premium' (CIE 2025).

The 'zoning effect' as estimated by Kendall and Tulip (2018) for houses largely reflects the fact that people are prepared to pay less per m² for larger blocks than for smaller blocks. It is the difference between the estimated average price per m² actually paid for an average block and the estimated/modelled price people are prepared to pay for each additional m². The latter represents the 'marginal opportunity cost of land' on the basis that, at least in theory, in the absence of zoning constraints on lot sizes, a developer could acquire and create new lots at that marginal value. The 'zoning effect' calculated for houses in Brisbane in 2016 was \$159,000.

The 'zoning premium' is estimated by The Centre for International Economics (CIE) in their 2025 report 'Costs of Housing Regulation in Queensland' prepared for the Queensland Productivity Commission (QPC). It is the difference between the estimated residual land value for development land and the apparent market cost of compared rural land. For example, the estimated residual land value for zoned greenfield land is compared to the value of agricultural land (including hobby farming/rural living land) on the urban fringe, indicating that the zoning premium effectively added nearly \$150,000 to the cost of a greenfield house and land package in the Brisbane metropolitan area in 2024. This comprises the actual 'zoning premium' of \$127,709, plus a developer's margin on that premium of \$21,710 (17 per cent), and made up the bulk of the cost of planning regulation identified in the report for greenfield houses. (CIE 2025)

Further detailed investigation of the 'zoning effect' is not included here, partly because of the modelling used and partly because it is a more theoretical analysis of average versus marginal land values. For example, the Kendall and Tulip (2018) analysis makes no allowance at all for upgraded infrastructure on the basis that they assume no increase in urban population or land area in estimating marginal cost. There is also the concept of creating additional lots through realigning boundaries using multiple pieces of 'marginal' land from adjacent existing developed lots. These approaches may be convenient from a theoretical economic perspective, but are difficult to relate to from a more practical development economics point of view.

The rest of this paper therefore focuses on the calculation of the 'zoning premium', and specifically that estimated for greenfield lots in Brisbane.

The zoning premium as calculated by CIE

The calculation of the zoning premium by CIE is summarised in Table 1 (CIE 2025).

Table 1: Value/cost components per greenfield lot in Brisbane metropolitan area

Value/cost component	Amount (\$)	Explanation
Developed lot sale price		
Sale price	417,000	Median new lot sale price for South East Queensland (SEQ) in 2024 (UDIA 2025)
Development costs		
Fees	7,171	Consultant and development assessment fees
Site preparation	75,203	Cost for constructing the lot and associated on-site services
Infrastructure charges	41,554	Allowance for the provision of trunk infrastructure to support the development of the new lot, using the average of the charges for the Fitzgibbon and Greater Flagstone Priority Development Areas (PDAs)
Other taxes and charges	31,046	Includes stamp duty on raw land purchase, council rates, land tax and water charges during development, and GST on the developed land
Sales, marketing and finance costs	33,390	Includes developer sales and marketing and finance for the land, development and marketing
Developer's margin		
Profit/risk margin	67,735	Allowance of 17 per cent of 'Residual land value' and 'Development costs' (excluding GST on the developed land from the latter)
Residual land value (urban zoned land)		
Raw land value	160,900	Residual land value per developed lot, calculated as the 'Developed lot sale price' minus both the 'Development costs' and the 'Developer's margin', representing what developers would have offered per developed lot for the raw zoned land, if they had assumed the developed lot sale price and the costs as identified
Value of equivalent rural land		
Opportunity cost of land	33,192	Estimated average value per developed lot of agricultural sites, and residential sites of more than one hectare, in the Brisbane, Ipswich, Logan and Moreton Bay local government areas (LGAs) (assumes \$78.80 per m ² for the average developed lot size of 421 m ² – draws on state valuation data with adjustment for value of improvements) ¹
Zoning premium		
Zoning premium	127,709	'Residual land value (urban zoned land)' minus 'Value of equivalent rural land'

¹ The median developed lot size for SEQ in 2024 was 421 m² (UDIA 2025).

Alternative explanation of the zoning premium

Although presented by CIE as wholly a measure of 'scarcity rents' resulting from planning constraints on land supply, the zoning premium as calculated for new greenfield lots in Brisbane may be largely explained by a combination of the following:

1. additional land costs for the rural land that are not accounted for by CIE, those being the costs of undevelopable land and the land required for local roads, parks and drainage to support developed lots;
2. additional trunk infrastructure costs, not accounted for by CIE, that are capitalised into the value of land that is zoned and planned for infrastructure provision, but not available to support equivalent development in rural areas that are not (yet anyway) planned to be serviced;
3. assumed future developed lot sales price escalation that developers may incorporate into their offer prices to secure the urban zoned land; and
4. locational value for the zoned land compared to equivalent unzoned land.

The following sub-sections consider each of these cost components in turn.

Additional land costs

In estimating the per lot opportunity cost of \$33,192, based on the agricultural or large lot residential value of rural land, the per m² land value (\$78.80) has been applied to only the assumed average new developed lot size, i.e. 421 m². This makes no allowance for necessarily associated land that is either:

- not developable for urban purposes, e.g. land generally will have constraints such as flooding, steep land or native vegetation; or
- required to provide supporting infrastructure for new developed lots, e.g. local roads, parks and drainage.

If allowance is made for 30 per cent of the raw land to be not developable, and one-third of the remaining developable land to be used for local roads, parks and drainage, about 53 per cent of the total raw land area would not contribute to the new developed lot areas.² That equates to about 475 m² of land, or about \$37,400 land value at the \$78.80 per square metre cost assumed by CIE.³

So, it would be reasonable to indicatively allow a further \$37,400 per new developed lot for the additional land costs necessarily associated with developing the rural land for urban purposes. Such land costs are automatically reflected in the residual land value calculation for the urban zoned land (see Table 1) because those costs are expressed per new developed lot.

Additional infrastructure costs

The cost of trunk infrastructure required to support development of the urban zoned land is assumed by CIE to be captured entirely by the noted infrastructure charges, i.e. the \$41,554 per lot estimated in this case. However, it is understood that such charges cover only part of the trunk infrastructure costs. For example, at a recent Planning Institute of Australia (PIA)

² These percentages of undevelopable land and land for local roads, parks and drainage were previously used for long-term regional settlement planning scenarios in SEQ (QG 2017b).

³ The detailed calculation is as follows: $30\% + 0.33 \times 70\% = 53\%$ of total land area is not available for the new developed lots, which is equivalent to: $53\% / 47\% \times 421 \text{ m}^2 = 475 \text{ m}^2$ of unavailable land per new lot.

forum in Brisbane a presentation indicated that trunk infrastructure is costing around \$70-90,000 per lot (PIA 2026). Other research suggests that the standard capped infrastructure charges applying outside PDAs have only covered about 50 per cent of the costs to local governments in SEQ (LGAQ 2024). The current standard capped charge for a new residential lot is \$36,670.70 (QG 2016, 2017a).

So, it would be reasonable to indicatively allow \$30-45,000 per lot in additional trunk infrastructure costs that have not been allowed for by CIE. Those additional costs may be covered in various ways. For example: by councils' general revenue, maintenance funding or debt; by state or federal government programs such as the Residential Activation Fund or catalytic infrastructure funding; or maybe partly by delayed provision (LGAQ 2024; QG 2026a, 2026b).

Those additional trunk infrastructure costs would be expected to contribute to the underlying land value per new greenfield lot in those urban zoned areas where such infrastructure is planned, compared to those areas where it is not planned. This component of land value is thus a function of expected infrastructure investment, rather than zoning per se. The two need to be considered separately because zoning commonly precedes the commitment of infrastructure to support development.

It should also be noted that infrastructure investment cannot be readily extended, simultaneously, to more catchments without incurring higher costs per developed lot. The additional costs associated with extending infrastructure provision across more growth fronts, to accommodate the same overall level of urban growth over time, are indicatively explained by Spiller and Forrest (2017). In Queensland, development outside the Priority Infrastructure Area (PIA) can be required to pay any extra trunk infrastructure costs (QG 2016). It is difficult to account in dollar terms for such additional costs here. However, this factor reinforces the need to account for the additional trunk infrastructure costs which are identified above.⁴

Developed lot sales price escalation

As per the indicative value/cost components in Table 1 above, developers generally inform what they are prepared to offer original landowners for development land by estimating the residual land value. The actual value calculation will vary depending on the expected end sale prices, the associated development costs and the expected developer's risk/profit margin, and individual developers will usually consider multiple different scenarios for residual land value. (Havard 2014)

To the extent a planned limit to land supply increases competition between developers, a way in which they may justify paying more for the land than others is to assume some (or greater than others) escalation of end sale prices over the expected development period. Although this may be seen as risky, median greenfield lot prices in SEQ increased about 90 per cent in nominal terms from 2015 to 2025, providing more confidence for such price escalation assumptions (UDIA 2025, 2026).⁵

As an indication only of the sort of variation there might be in end sale price assumptions by competing developers, the actual annual percentage growth in median lot sale prices in SEQ

⁴ The additional infrastructure costs of more growth fronts, for the same overall level of growth, is a factor discouraging utility providers from supporting such additional growth fronts, and additional zoned land, unless there is a mechanism such as the PIA for obtaining out-of-sequence infrastructure costs.

⁵ It is important to note that, while such price escalation has occurred historically, the same enabling economic environment, e.g. declining interest rates and increasing real household incomes, which supported such escalation may not apply in the future to the same extent (Anstey 2025).

over the 10 years to 2025 is summarised in Table 2. Most of the price growth was in the latter half of the decade.

Table 2: Annual percentage growth in median lot sales prices in SEQ, 2015-2025

Year	Median lot sales price growth from preceding year (%)
2016	1.6
2017	1.5
2018	0.8
2019	1.5
2020	-4.1
2021	9.3
2022	26.1
2023	4.8
2024	11.5
2025	17.0

It would appear reasonable to indicatively allow for a developer assuming up to about 10 per cent more value per lot over a year, and more over multiple years - depending on the expected development timeframe, to enable them to offer more for the land.

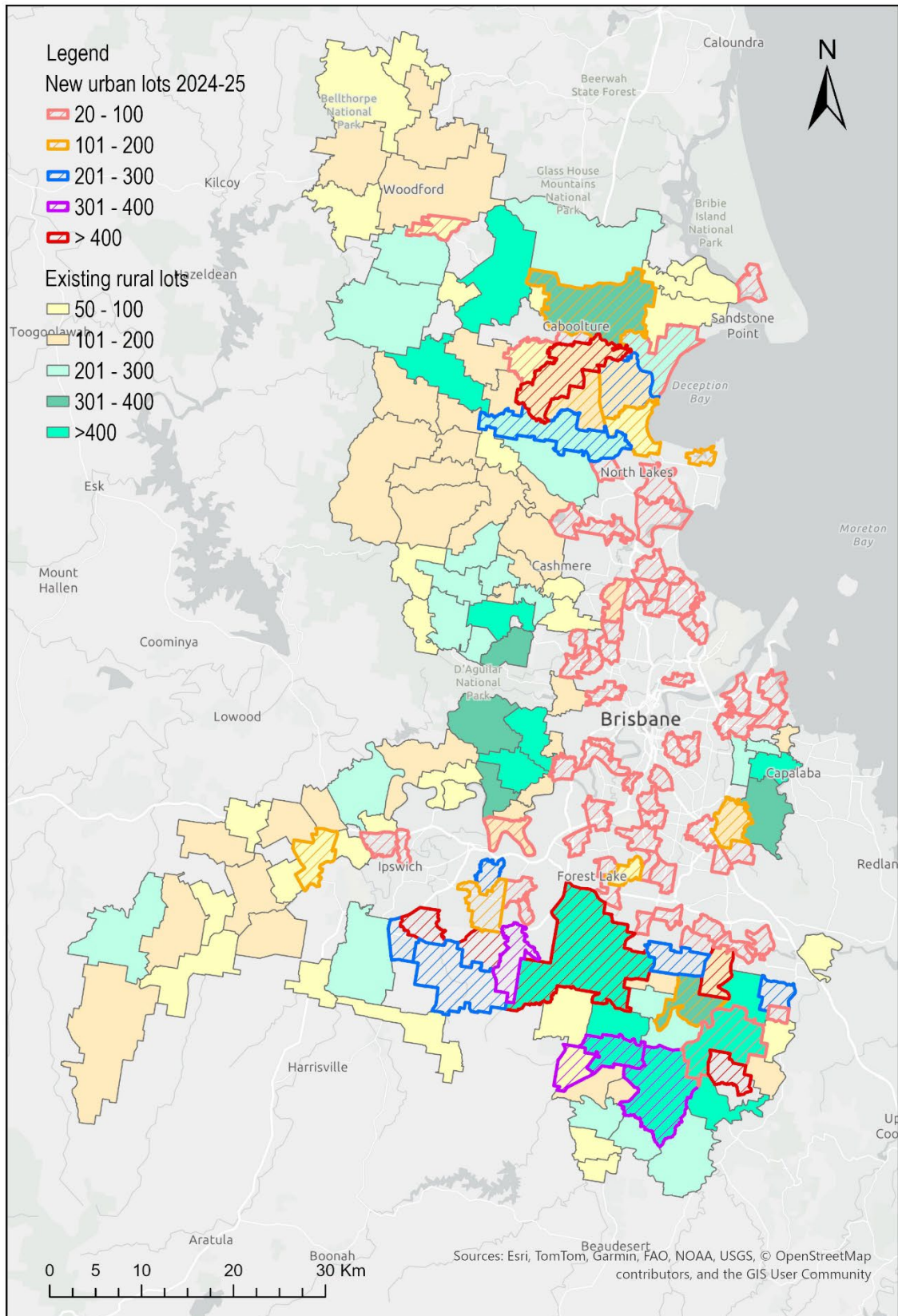
Locational value of urban zoned versus rural land

Figure 1 illustrates, thematically by locality within the Brisbane metropolitan area, the spatial relationship of new urban lots (2024-25) with an approximation of the existing rural lots that provided the basis for the estimation of the opportunity cost of land by CIE (BCC 2026; CoMB 2026; ICC 2022⁶; LCC 2026; QG 2023, 2025).⁷

⁶ As current GIS zoning data was not available via open data sources, Ipswich City Council (ICC) GIS zoning data as at 19 August 2022 was used as a close approximation of current Rural zoning (broadly checked visually on 23 May 2026 for consistency with Ipswich City Plan 2025 online mapping at <https://ipswich.isoplan.com.au/eplan/property/17054348/16952076/-3186104/-3234183/0/200>)

⁷ LGAs included, consistent with the CIE analysis, are Brisbane, Ipswich, Logan and Moreton Bay. New urban lots are all freehold lots from 200 to 800 m², not including common property lots in Community Title Schemes, created from 15 December 2023 to 1 July 2025. The dates approximate the calendar year 2024, to align with the median lot sale price used by CIE (see Table 1), due to cadastral data availability. The localities shown represent 92 per cent of all such new urban lots. To approximate the agricultural sites and residential sites of more than one ha drawn by CIE from valuation data (see Table 1), the existing rural lots are those freehold lots greater than one ha as at 1 July 2025 included in the following zones: Brisbane – Rural, Rural residential and Environmental Management; Ipswich – Rural A, B, C, D and E (previous planning scheme zones); Logan – Rural and Rural residential; Moreton Bay – Rural and Rural residential. The localities shown represent 94 per cent of all such rural lots.

Figure 1: Numbers of new urban lots (2024-25) versus existing rural lots by locality



The pattern of development across the region means that a high proportion of the rural lots, which includes a high proportion of rural residential lots, are quite well located compared to the new urban lots. This is partly because of the mountains west of Brisbane and also because rural residential development has occurred historically in what are now urban growth corridors, particularly north and south of Brisbane. In any case, this spatial relationship means there is no strong region-wide basis for attaching a location premium to the value of urban zoned land developed in 2024, in comparison to the rural lots.

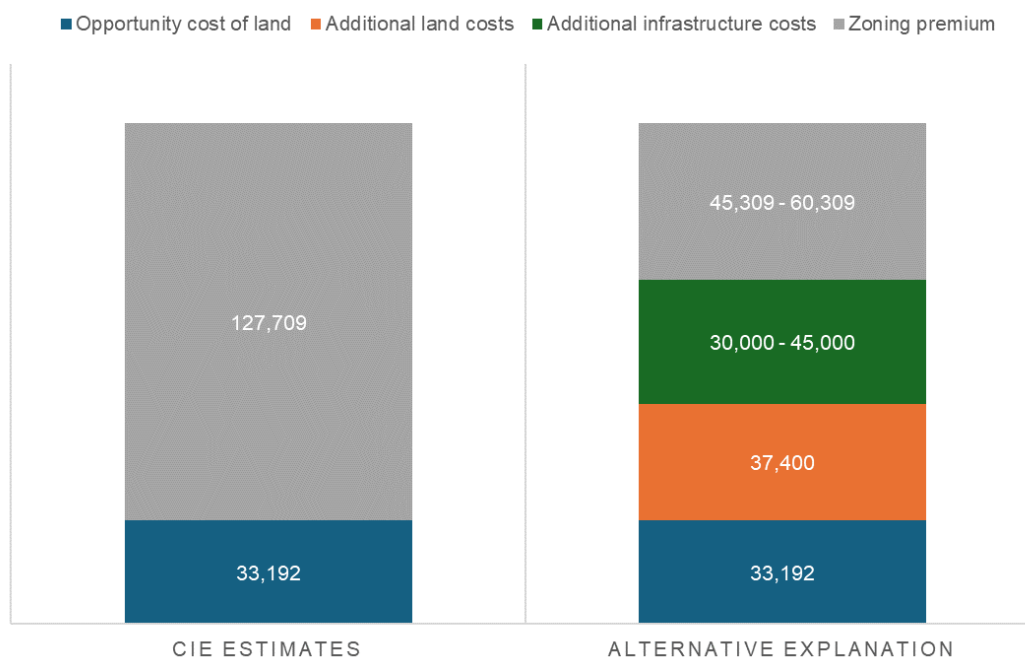
Summary review of zoning premium

An alternative explanation of the zoning premium is therefore summarised in Figure 2 below. The first two factors above can be taken as affecting the zoning premium estimated by CIE as follows:

- additional land costs of \$37,400 that would necessarily be associated with developing the equivalent rural land for urban purposes; and
- additional infrastructure costs of \$30-45,000 would need to be expended to bring the equivalent rural land to the same base status as the urban zoned land.

The overall effect of those two factors is thus to add to the opportunity cost of land by \$67,400 – 82,400, and consequently reduce the zoning premium to \$45,309 - 60,309.

Figure 2: Alternative explanation of zoning premium



Compared to the 2023 median lot sale price in SEQ, i.e. \$374,000, the reduced zoning premium represents 12.1 to 16.1 per cent.⁸ Over a development period of perhaps 1-2 years (to the point of sale of developed lots), the scale of the reduced zoning premium shown in Figure 2 might therefore be explained by the indicative amount of developed lot sales price escalation noted above, i.e. 10 per cent over a year. This aligns the concept of a zoning

⁸ The 2023 median lot sale price is used, instead of that for 2024, in recognition of the fact that, at the time developers make offers for the raw development land, they necessarily make informed assumptions about what the developed lots might sell for once developed, informed by pricing up to that time. So, the 2023 median lot sale price could have informed an assumed future developed lot sale price that aligns with the actual 2024 median lot price.

premium, which is taken to result from the zoning constraint on available land options, with the development economics logic a developer might use to justify paying more for land while still (hopefully) sustaining the viability of their business.

Discussion and conclusions

The zoning premium as estimated by CIE for new developed greenfield lots in Brisbane fails to take account of additional land costs and additional infrastructure costs that would be necessary to enable urban development on the compared rural land. Once those costs are considered and removed from the zoning premium, the remaining amount is of a scale that can be largely explained by developed lot sales price escalation that might be assumed by a developer in justifying paying more for the land.

This finding is important as it provides a development economics rationale for the remaining zoning premium. Developers can only sensibly justify paying amounts for raw development land that still enable them to see a path forward to profitable development.

There is a key corollary of this finding. To the extent the assumed developed lot sales price escalation occurs anyway due to demand side factors such as population or income growth or lower interest rates, the impact of zoning can be seen as 'working with the market' to maximise raw land prices. The risk for developers is that the assumed developed lot sales price escalation does not occur, resulting in reduced profit, or even losses, or perhaps delayed development pending price growth. If the latter occurs this may effectively constrain developed lot supply, contributing to price growth.

This paper identifies an error by CIE in not fully accounting for land costs in estimating the opportunity cost of land. The impact of that error should be recognised.

The paper also highlights the importance of fully considering the trunk infrastructure costs required to support urban land development. Those costs need to be considered separately from the impact of zoning itself because zoning often precedes the commitment of infrastructure to support development. Also, infrastructure investment cannot be readily extended, simultaneously, to more catchments without incurring higher costs per developed lot, a factor reinforcing the need to account for the additional trunk infrastructure costs identified in this paper.

A similar review of other estimates of the zoning premium, including those for higher density redevelopment, would be warranted to better understand the impacts of zoning on land values. Such findings will better inform any trade-offs that might be considered in balancing benefits of planned land supplies against the apparent costs of less competitive urban land markets.

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