

Apartments in Melbourne's Growth Equation

Property Council of Australia Growth Summit

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**Renewal + (Infill / Transport) +
Fringe x Planning -
Affordability + Greenfield x
Infrastructure - Housing /
Markets x Lifestyle –
Government + Heritage**

(Confused?...We All Are! Oh.....And Apartments Fit In There Too)

25% Born Overseas

233 Countries of Origin

180 Languages / 118 Religions

Global Market Country

Housing Affordability Stress

Social Infrastructure & Change

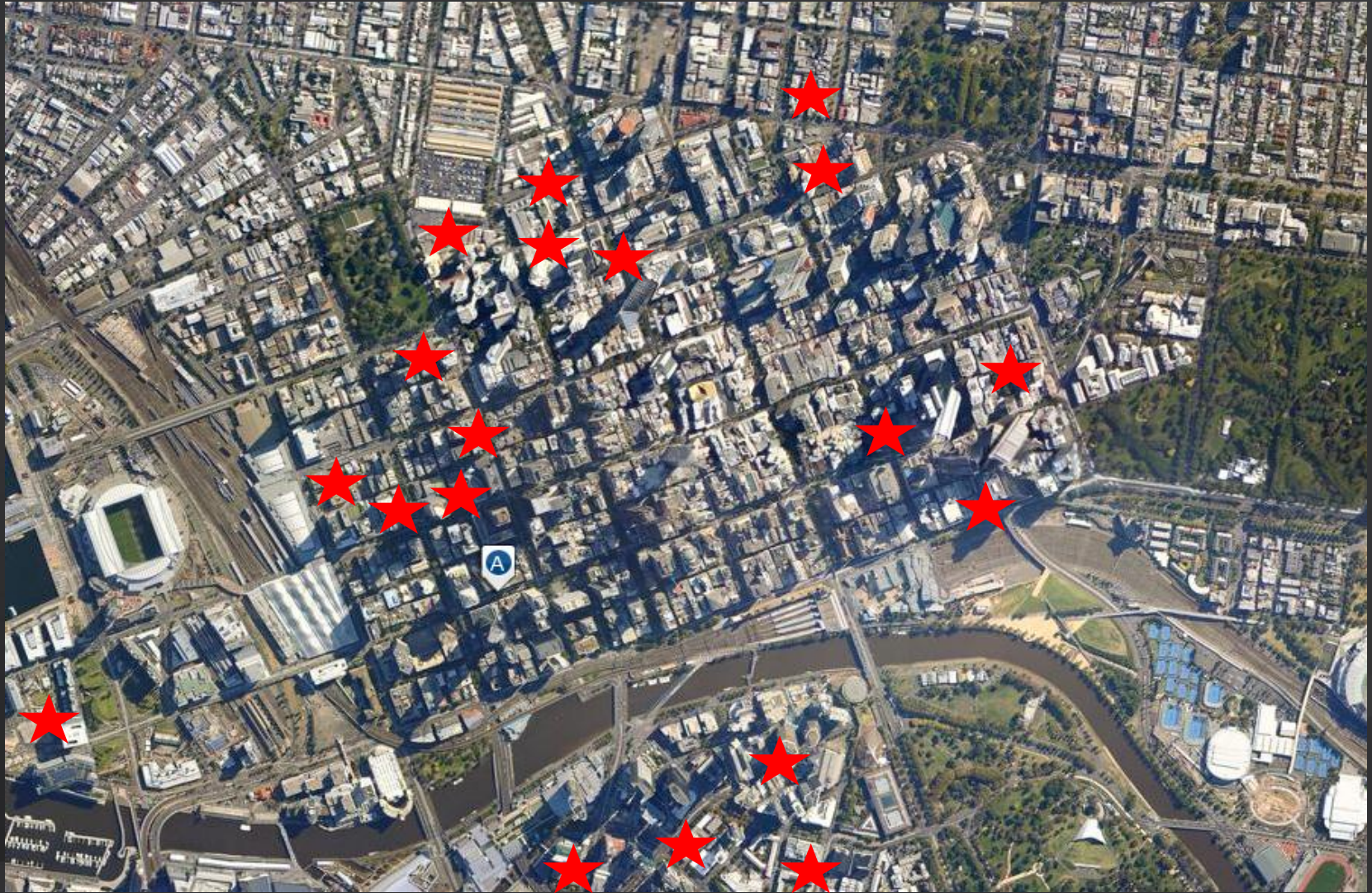
Global Lifestyle Influences





WORLD CITY

Global Developers/Investors in Melbourne



 Active site/development sponsored by Asian based/heritage investors

Global Developers/Investors in Melbourne



8 of 21 Active Projects



 Active site/development sponsored by Asian based/heritage investors

Global Developers/Investors in Melbourne



54% of Active Apartments



★ Active site/development sponsored by Asian based/heritage investors

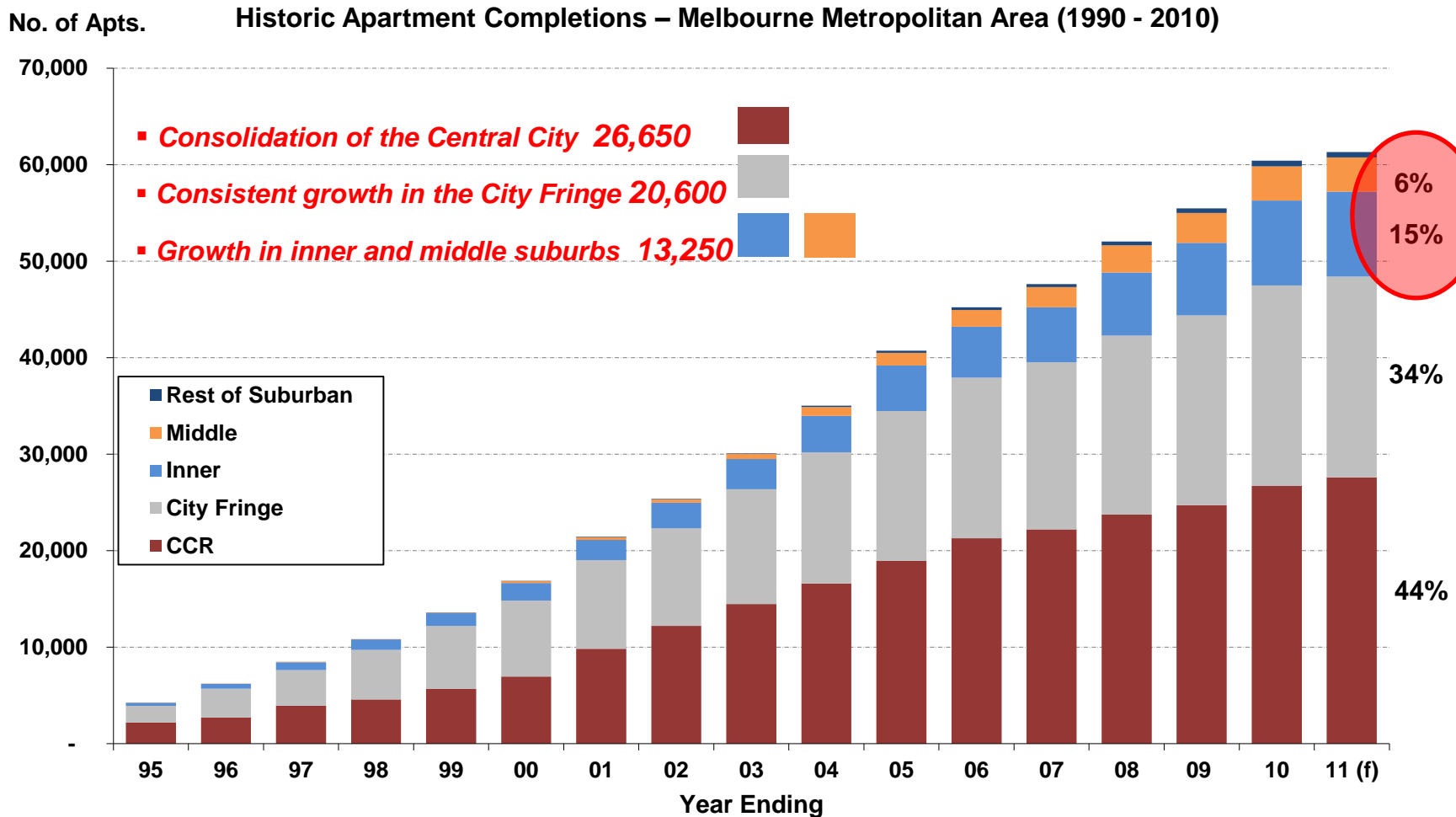
Apartments in Melbourne

The Market Has Spoken...

But It Started With A Whisper...

And Only Since 1990...But Not Everywhere...And Not All The Time...

Melbourne Metro Apartment Market – Evolution

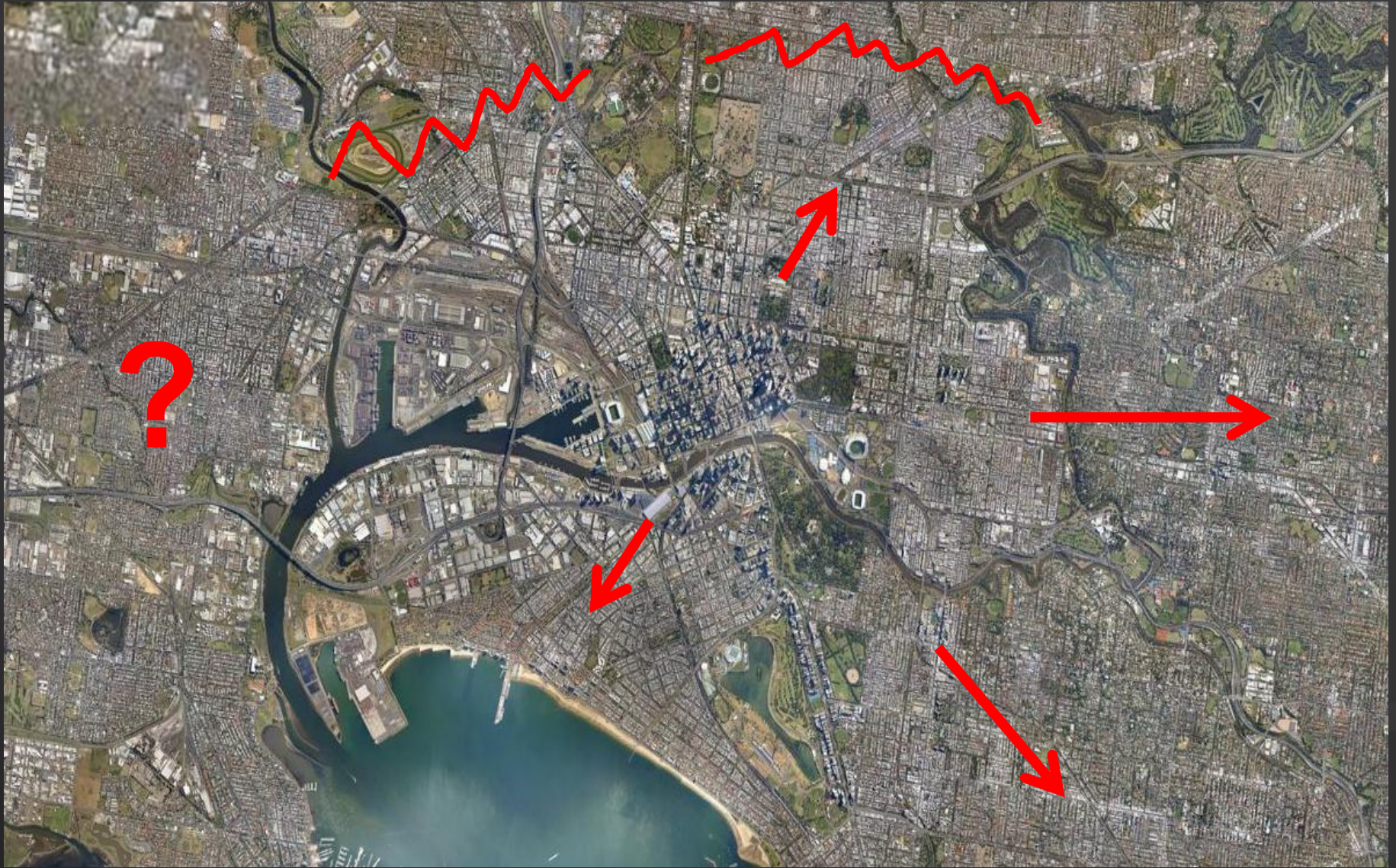


Source: Charter Keck Cramer

Market Evolution...

Even In A Flat City Not All Things Are Even

And So The Market Has Evolved

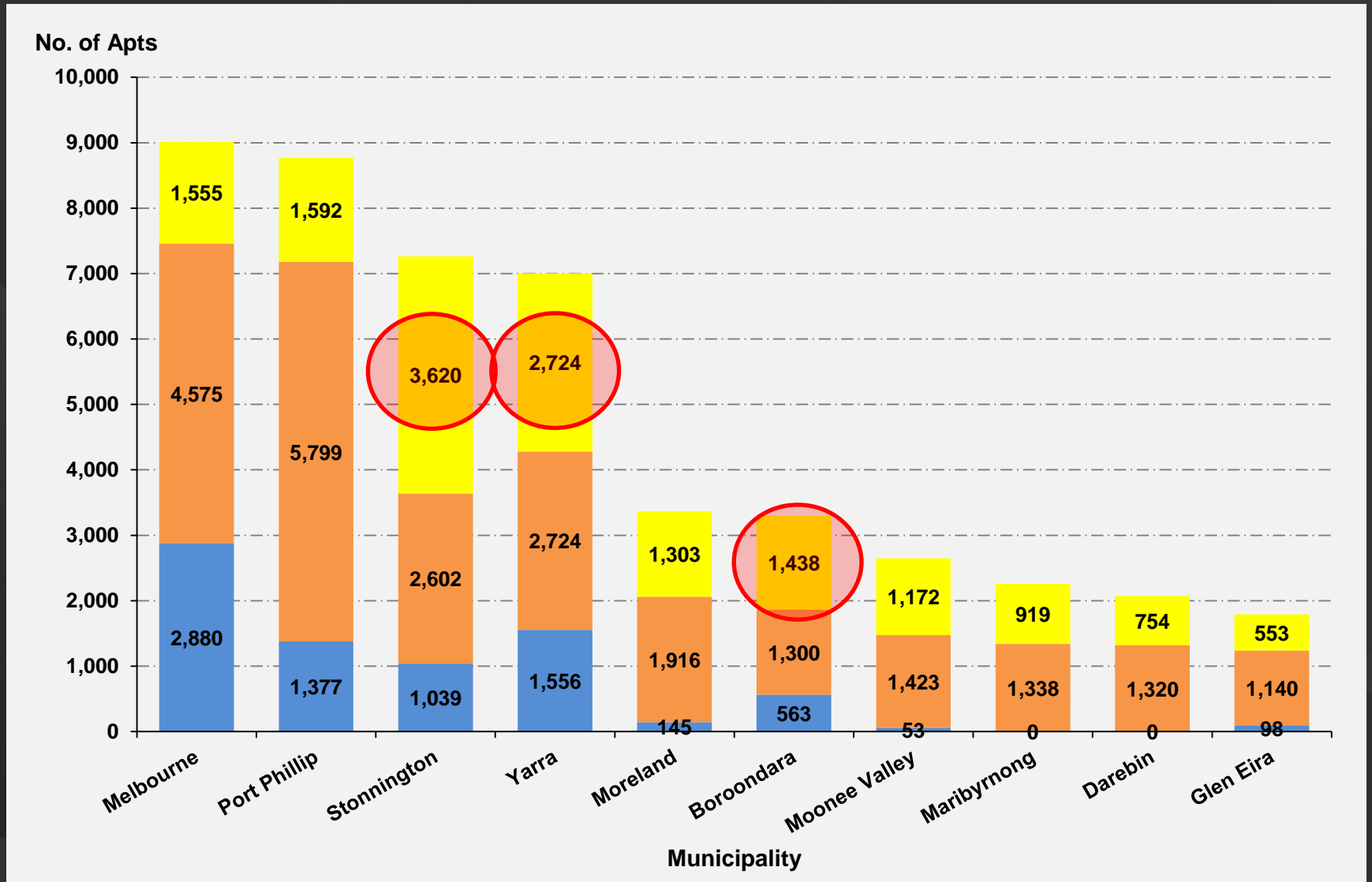


OK So The Market Has Spoken...What Next...?

It's About To Start Yelling

And It Deserves Everyone's Attention

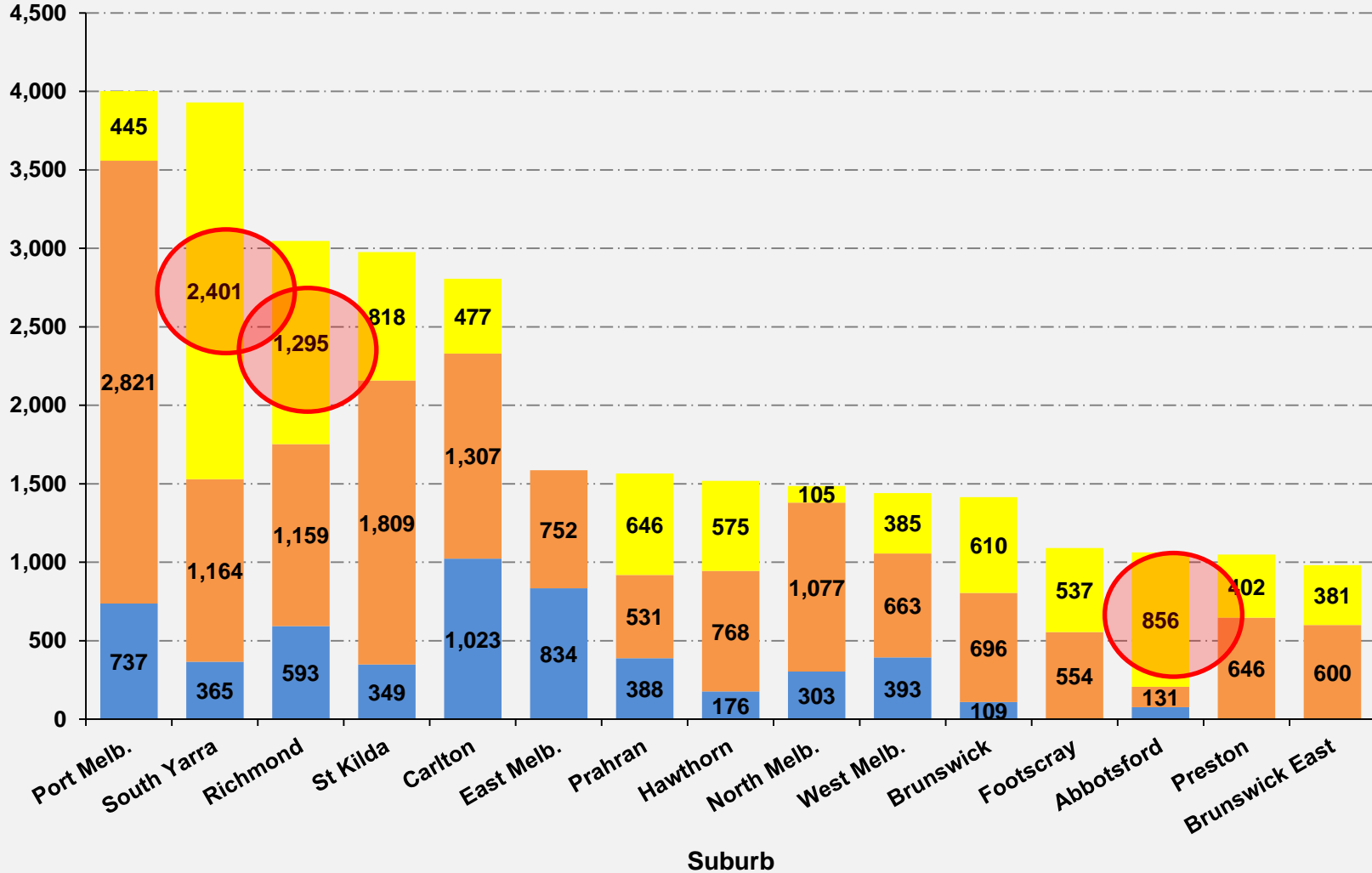
Melbourne Apartment Market – Coming Of Age



Source: Charter Keck Cramer

Melbourne Apartment Market – Coming Of Age

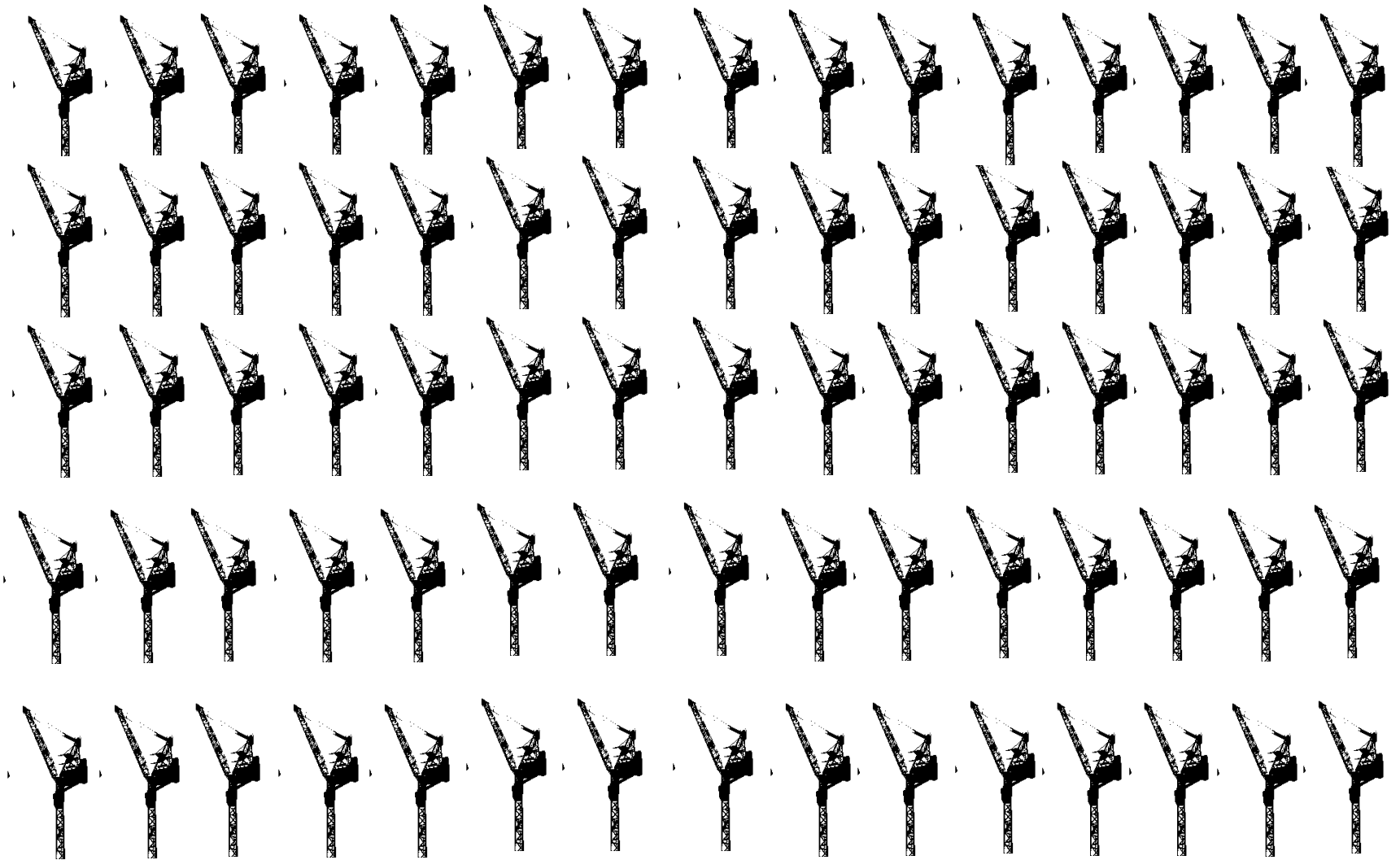
No. of Apts



Source: Charter Keck Cramer

Do We Understand?

The Market?...Scale & Speed Of Change?...Let's Go Crane Counting...



Proceeding Projects > 25 Apartments (CCR/City Fringe)

+ 3,047
(Excl. Cottage Industry)



South Yarra/Prahran

+ 2,151
(Excl. Cottage Industry)



Richmond/Abbotsford

Vision v Reality

Did Somebody Mention Leading A Horse To Water?...

Opportunity

An Open Window Before The Next Cycle...?

Challenges

Many...Varied...But They All Involve...

Slaying The Dragon...



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