



URBIS

Sunshine Coast Business Council

*Growth in Motion:
Key Projects Driving the
Sunshine Coast Forward*

November 2025
Sunshine Coast Business Council

Acknowledgement of Country



Urbis acknowledges the Traditional Custodians of the lands we operate on.

We recognise that First Nations sovereignty was never ceded and respect First Nations peoples continuing connection to these lands, waterways and ecosystems for over 60,000 years.

We pay our respects to First Nations Elders, past and present.

The river is the symbol of the Dreaming and the journey of life. The circles and lines represent people meeting and connections across time and space. When we are working in different places, we can still be connected and work towards the same goal.

Urbis is committed to incorporating our respect for First Nations cultures, peoples and storytelling in our work across the Country. We are proud to have partnered with Darug Nation artist, **Hayley Pigram**, and to profile her artwork – **Sacred River Dreaming**.

A Little About Us



900+

Brightest Minds

8

**Offices (Australia
& Singapore)**



Capabilities

Design
Economics
Engagement
Future State
Heritage
Investment
management
Planning
Policy
Research
Transactions
Valuations

Sectors

Commercial
Education
Energy & Renewables
Government
Health & Aged Care
Industrial
Infrastructure
Mixed Use
Residential
Retail
Telecommunications
Tourism & Leisure

Today's Agenda

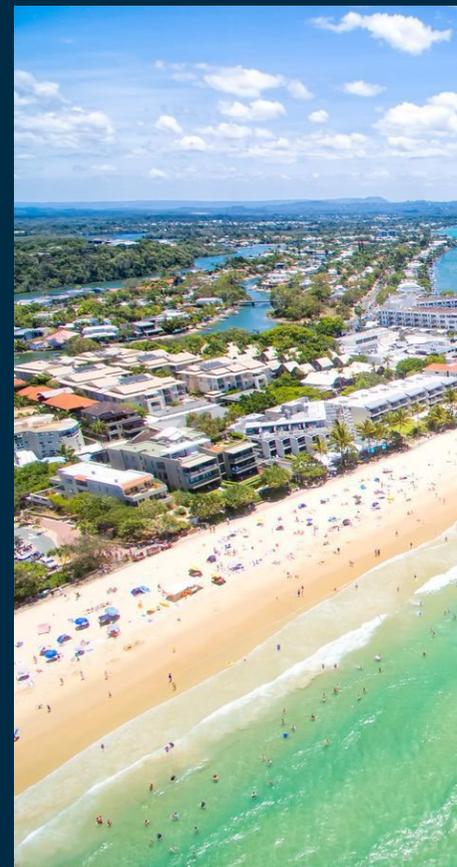
Investment Sentiment



Projects Shaping the Sunshine Coast



Infrastructure Pipeline Review



Managing Opportunity and Risk





Investment Sentiment

*Industry View –
Opportunities and Barriers*

Market Sentiment Interviews

General Views on the State of the Sunshine Coast Market

Development Momentum with Resourcing Challenges

Planning Scheme Uncertainty

Strong Investor Interest & Long-term Confidence

Expanding Market Focus & Geographic Shift

Lifestyle-Driven Relocation Fueling Demand

Big issues / red tape that is holding up your or you clients' projects?

Utility Service Delivery Issues

Prescriptive Zoning and Regulatory Constraints

Political Balancing Undermining Outcomes

Missed Opportunities in Infill & Strategic Planning

Managing Mixed-Use Transitions

Market Sentiment Interviews

What is your, or your clients view on investment to the Sunshine Coast?

Future Sunshine Coast – what are the biggest issues?

Growing Investor Speculation and Interstate Interest

Housing Affordability and Key Worker Accommodation

Strong Demand Across Diverse Asset Types

Strategic Land Use and Growth Management

Clear Potential but Need for Greater Certainty

Balancing Jobs and Housing Across the Coast

“Significant investment has put Sunshine Coast on the map – but greater certainty and direction is needed to harness sustained investment”



Major Projects underpinning the Pipeline

Projects Shaping the Sunshine Coast

Government Projects Shaping the Sunshine Coast

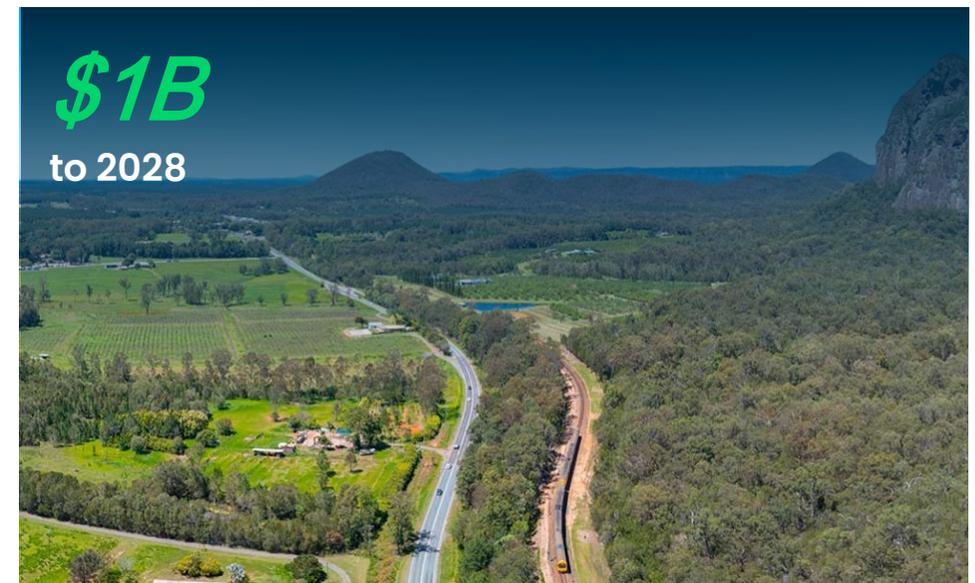
The Wave

The Wave represents a transformative infrastructure initiative for the Sunshine Coast—partnering heavy rail, metro-style services and road/transport upgrades to respond to growth, reduce congestion and deliver a lasting legacy for the 2032 Olympics and beyond.



Beerburrum to Nambour Rail Upgrade – Stage 1

The Beerburrum to Nambour Rail Upgrade is a pivotal infrastructure project for the Sunshine Coast—modernising one of South East Queensland’s key transport corridors to improve connectivity, safety, and efficiency.



Private Sector Projects

Shaping the Sunshine Coast

Aura

Aura stands as one of the largest masterplanned communities in Australia—shaping the southern Sunshine Coast into a vibrant urban hub. Designed by Stockland to deliver jobs, housing, and essential services close to where people live, Aura integrates residential, commercial, education, and transport infrastructure to support a growing population.



Maroochydore City Centre

The Maroochydore City Centre by Walker is a landmark urban renewal project at the heart of the Sunshine Coast—creating a vibrant commercial, residential, and cultural hub for the region. As the new CBD of the Sunshine Coast, it will attract investment, create jobs, and shape the region’s identity well into the 2032 Olympics and beyond.



Sunshine Coast Airport Masterplan 2040

The Sunshine Coast Airport Master Plan 2040 outlines a bold vision for a world-class aviation gateway that connects the region to global opportunities. As a key hub for business, leisure, and innovation, the Airport Master Plan 2040 underpins regional resilience and global connectivity



2032 Olympic and Paralympic Venues

Sunshine Coast Athletes Village



The Sunshine Coast Athletes Village will be integrated as part of the **\$1 billion** Sunshine Coast Arena by Walker

Sunshine Coast Stadium



\$148 million
Sunshine Coast Stadium expansion as part of the Kawana Precinct

Sunshine Coast Mt Bike Centre

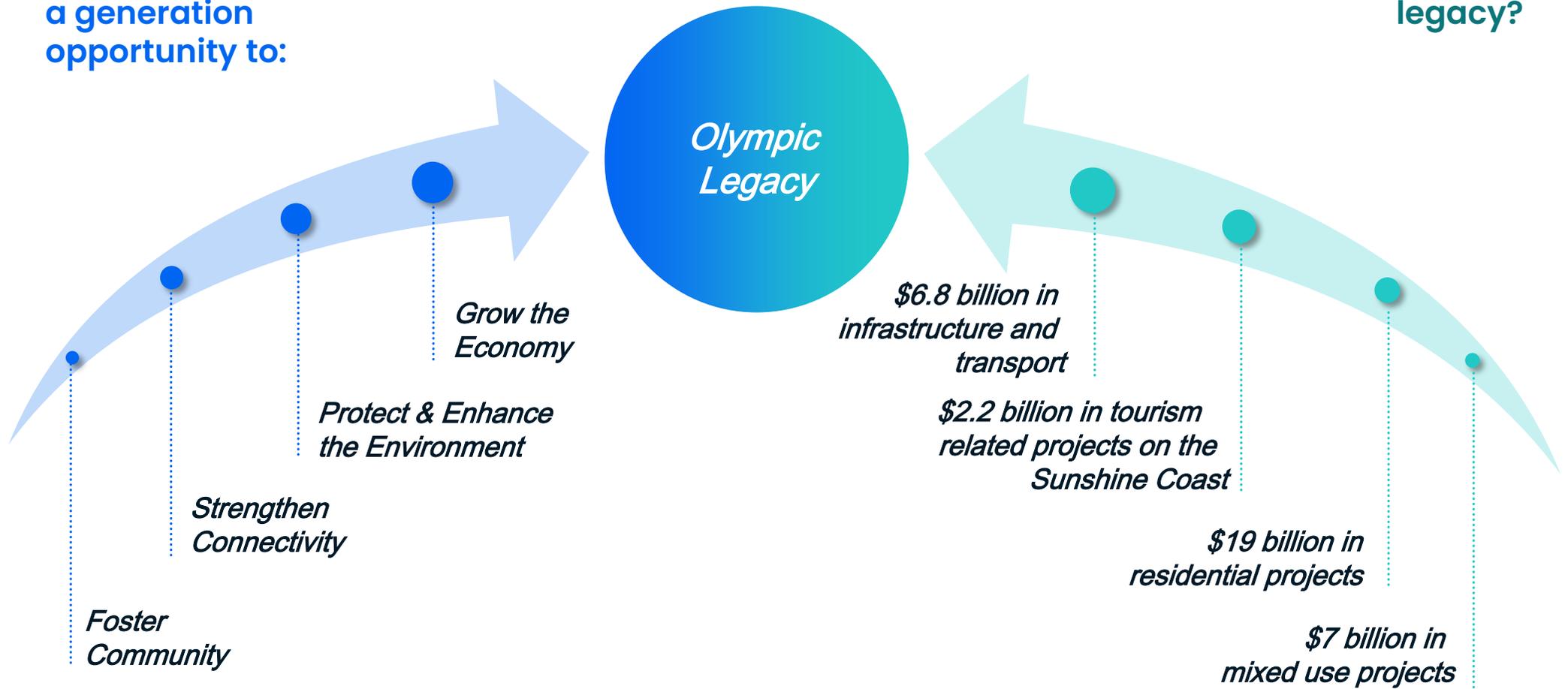


\$14 million
Mountain Bike Centre

Olympic investment on the Sunshine Coast will create jobs, attract visitors, and deliver world - class venues that strengthen the region's economy and sporting future.

Enabling Infrastructure and Legacy Value Beyond 2032

The Games represents a once in a generation opportunity to:



What in the pipeline can support our legacy?



Infrastructure Pipeline Overview

*Sunshine Coast
History and Future*

Sunshine Coast Major **Infrastructure Pipeline**

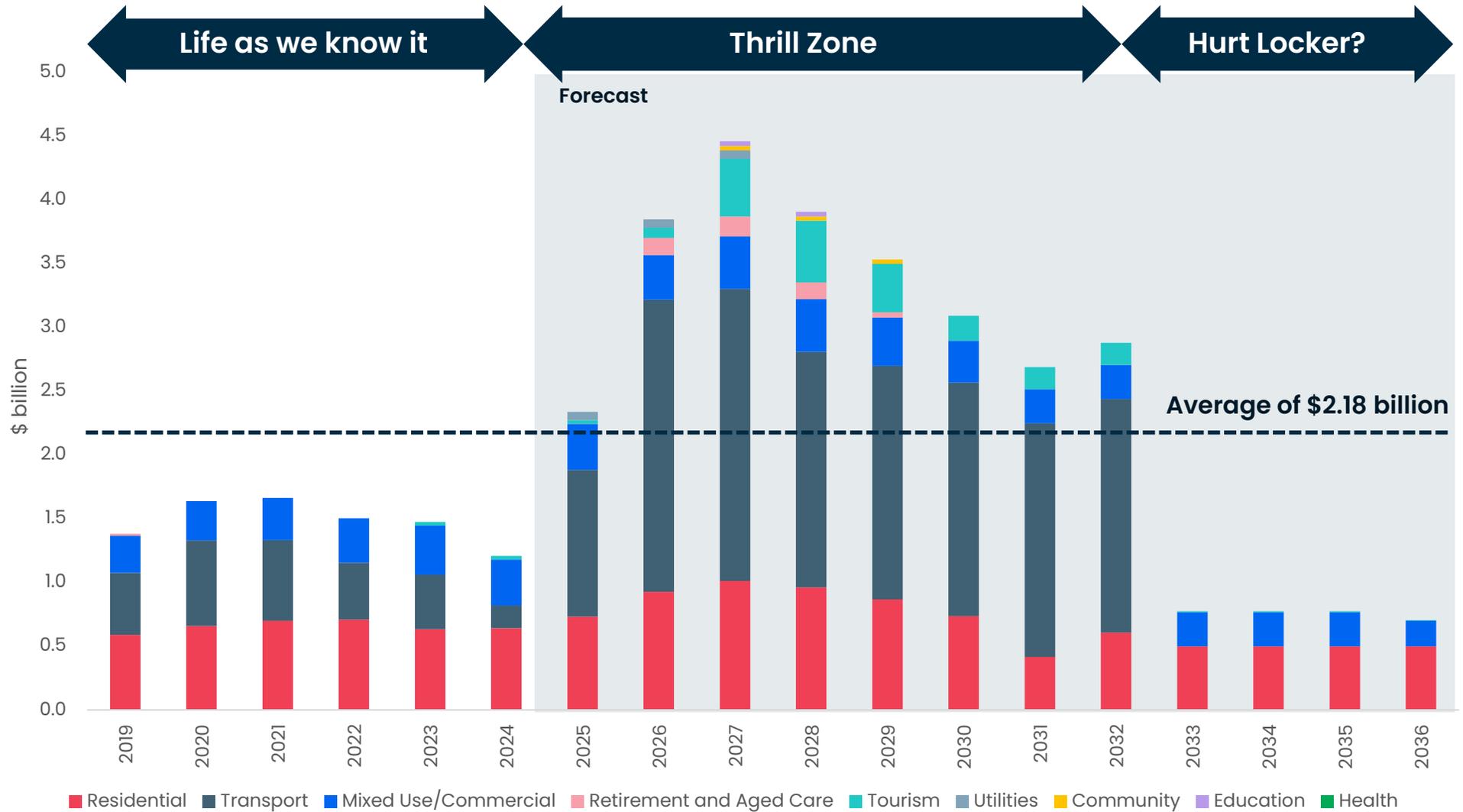
The Major Pipeline Overview was an SCBC initiative and first compiled a regional major project pipeline in 2020. This is the **5th update** of the analysis that Urbis has undertaken.

- Pipeline tracks private and public sector projects by, location, value, status, developer, start and completion dates, jobs and whether they have regional significance.
- Pipeline utilises key infrastructure and construction databases. Urbis works with SCBC members and other stakeholders in updating our analysis.
- Current pipeline lists **49 regional projects > \$50m**, and **a total investment value of over \$43b.**

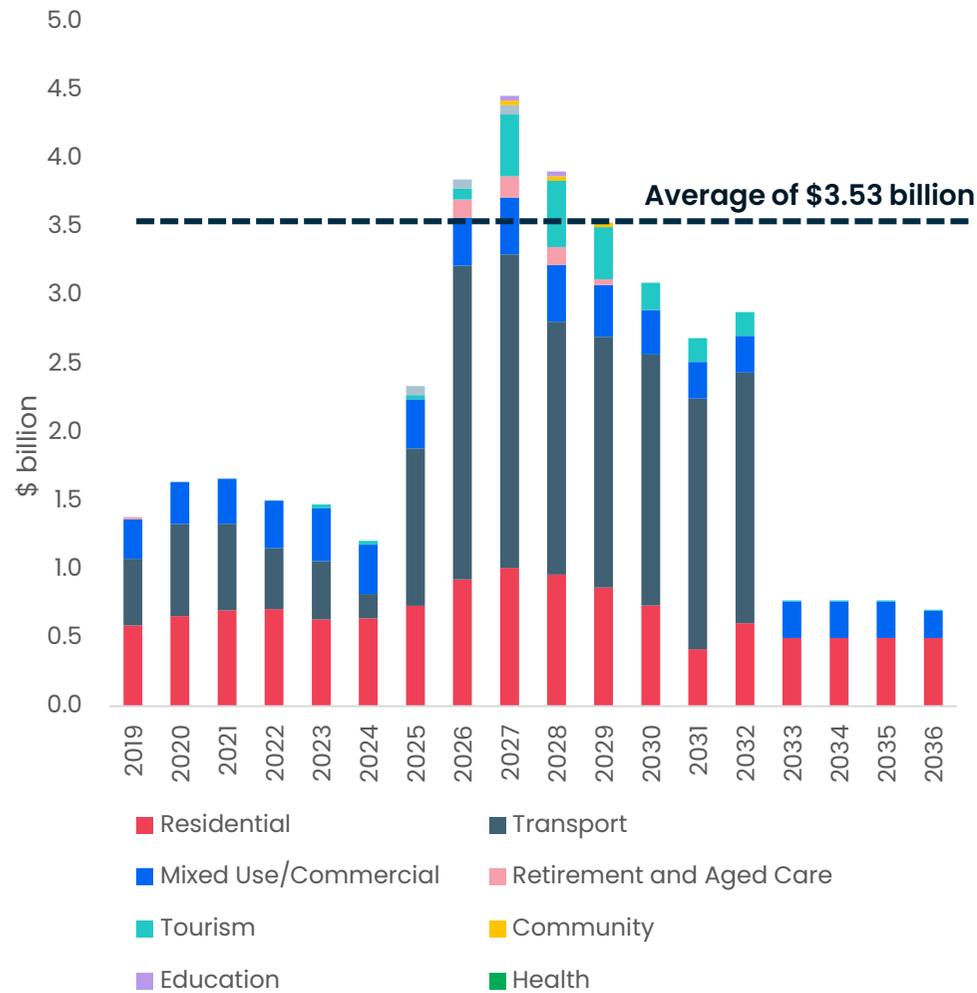


Infrastructure Pipeline

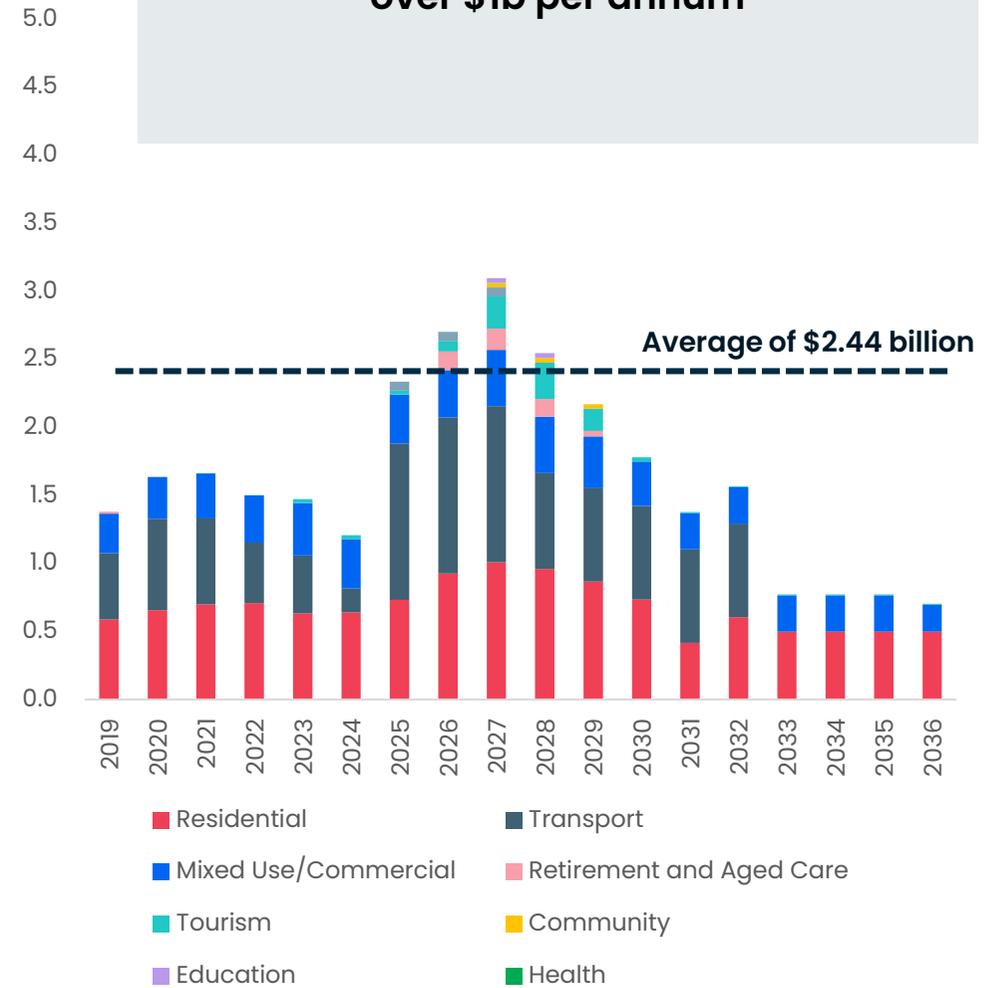
Key Industry Sector Investment



Infrastructure Pipeline Olympic Impact

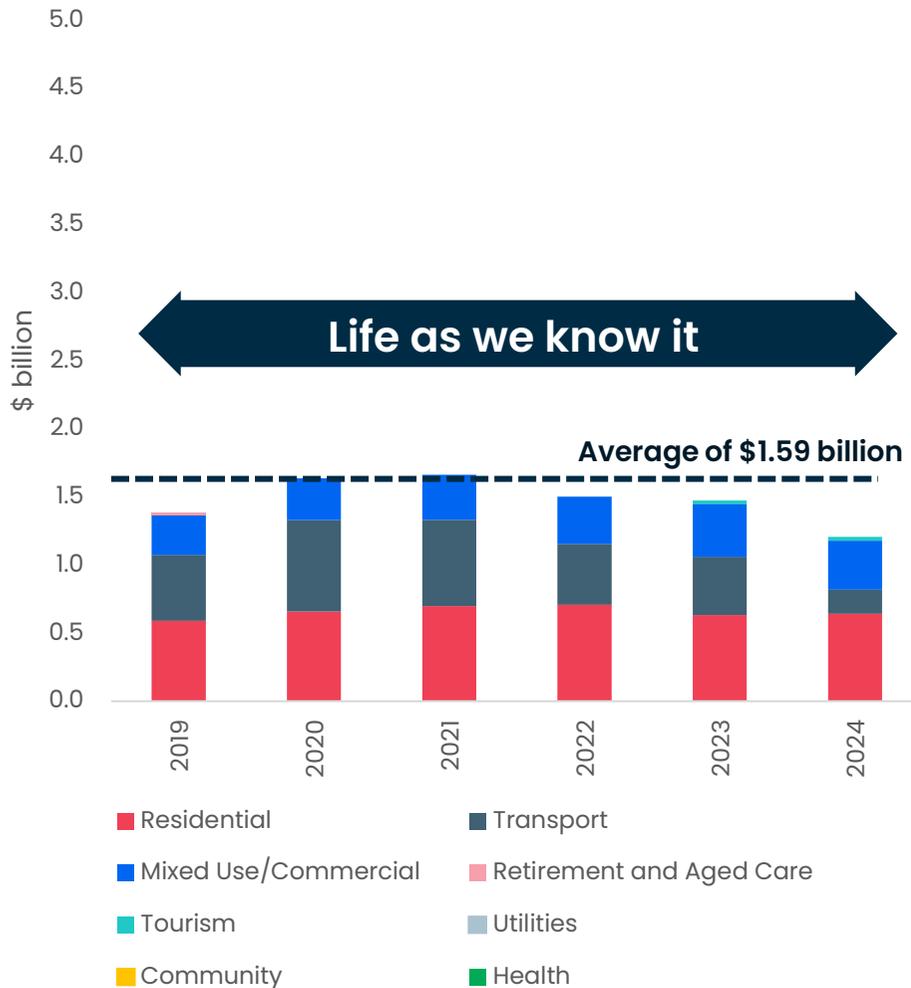


Impact of Olympics focused investment significant – over \$1b per annum



Infrastructure Pipeline

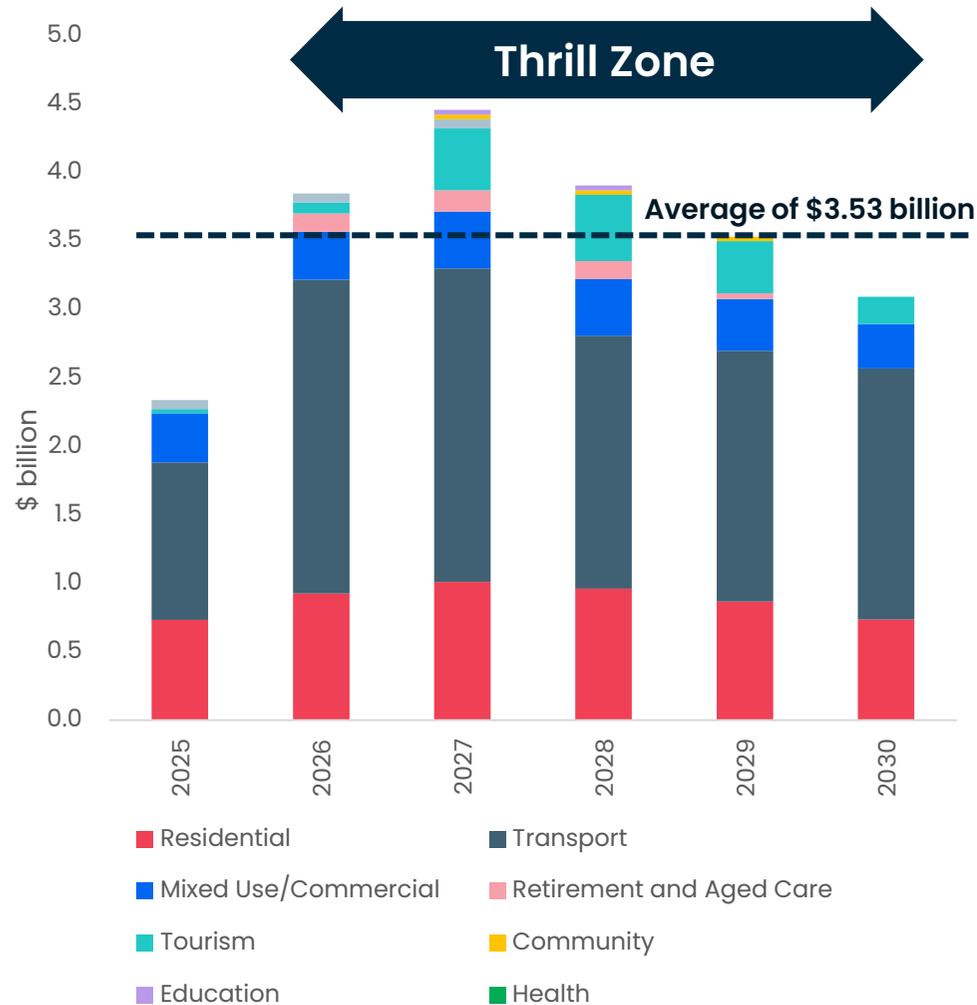
Key Industry Sector Investment (2019–2024)



- 1  **\$3.93 billion** in Residential investment, accounting for **41%** of the pipeline
 Aura
 Harmony
 Bokarina
- 2  **\$2.84 billion** in Transport investment, accounting for **30%** of the pipeline
 Bruce Highway Upgrades
- 3  **\$2.02 billion** in Mixed Use/Commercial investment, accounting for **21%** of the pipeline
 Maroochydore City Centre
 Birtinya Masterplan
 Sunshine Coast Airport
- 4  **\$690 million** in Health investment, accounting for **7%** of the pipeline
 Sunshine Coast University Hospital
- 5  **\$60 million** in Tourism investment, accounting for **0.6%** of the pipeline
 Avani Hotel

Infrastructure Pipeline

Key Industry Sector Investment (2025–2030)



- 1 ↑ 

\$11.2 billion in Transport investment, accounting for **53%** of the pipeline

Rail Upgrades
The Wave
- 2 ↓ 

\$5.23 billion in Residential investment, accounting for **25%** of the pipeline

Aura
Harmony
Sol

Major risk?
- 3 = 

\$2.24 billion in Mixed Use/Commercial investment, accounting for **11%** of the pipeline

Maroochydore City Centre
Birtinya Masterplan
Sunshine Coast Airport
- 4 ↑ 

\$1.62 billion in Tourism investment, accounting for **8%** of the pipeline

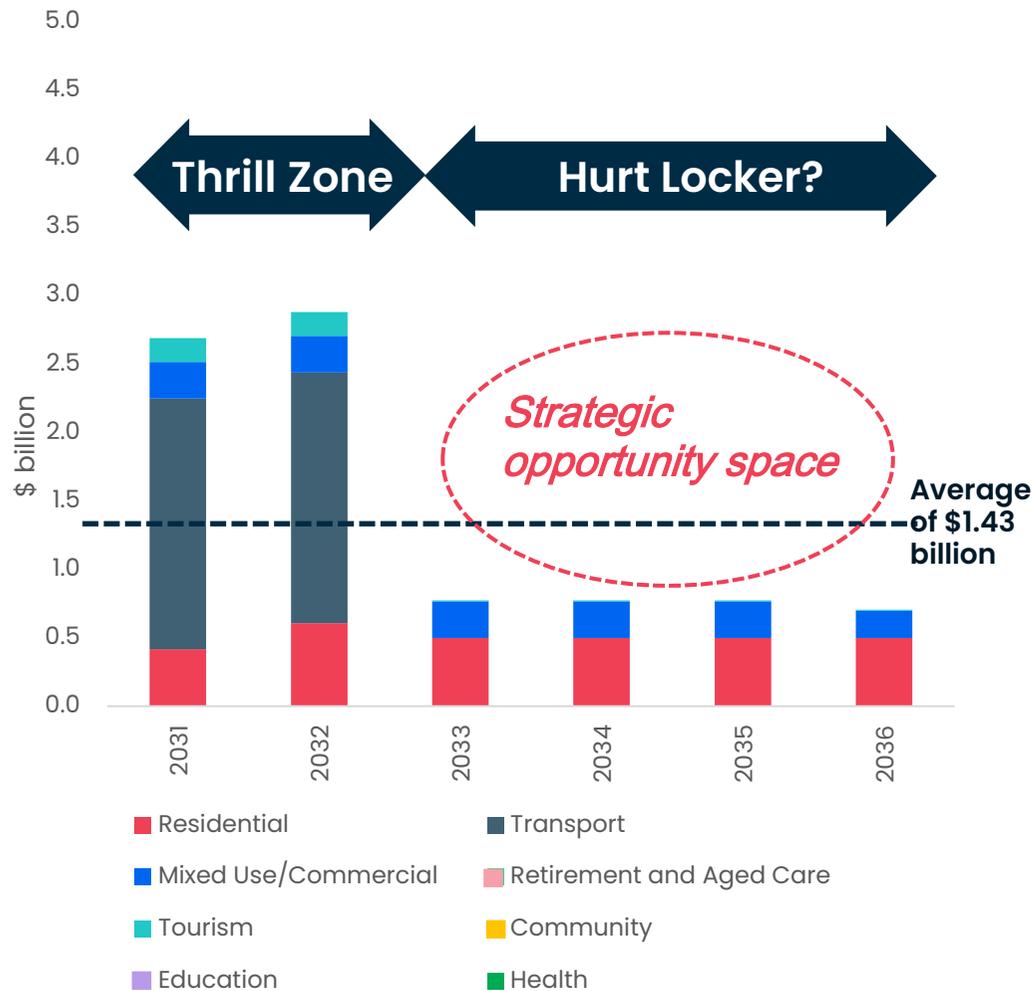
Sunshine Coast Arena
Mooloolaba Integrated Resort
Sunshine Coast Stadium Upgrade
- 5 ↑ 

\$460 million in Retirement and Aged Care investment, accounting for **2%** of the pipeline

Halcyon Retirement Village Yandina
Highworth – Ingénia
TriCare Aged Care Facility

Infrastructure Pipeline

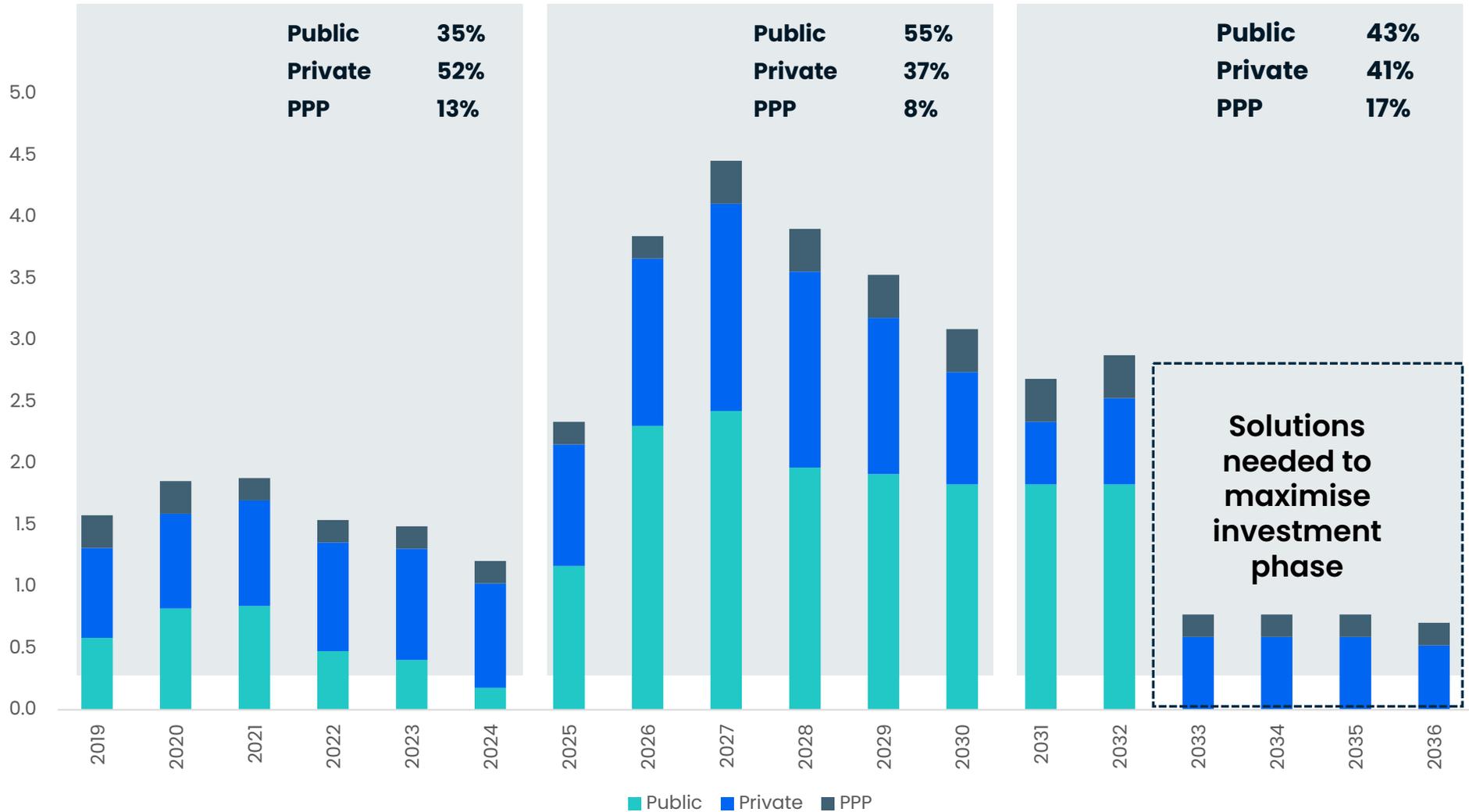
Key Industry Sector Investment (2031-2036)

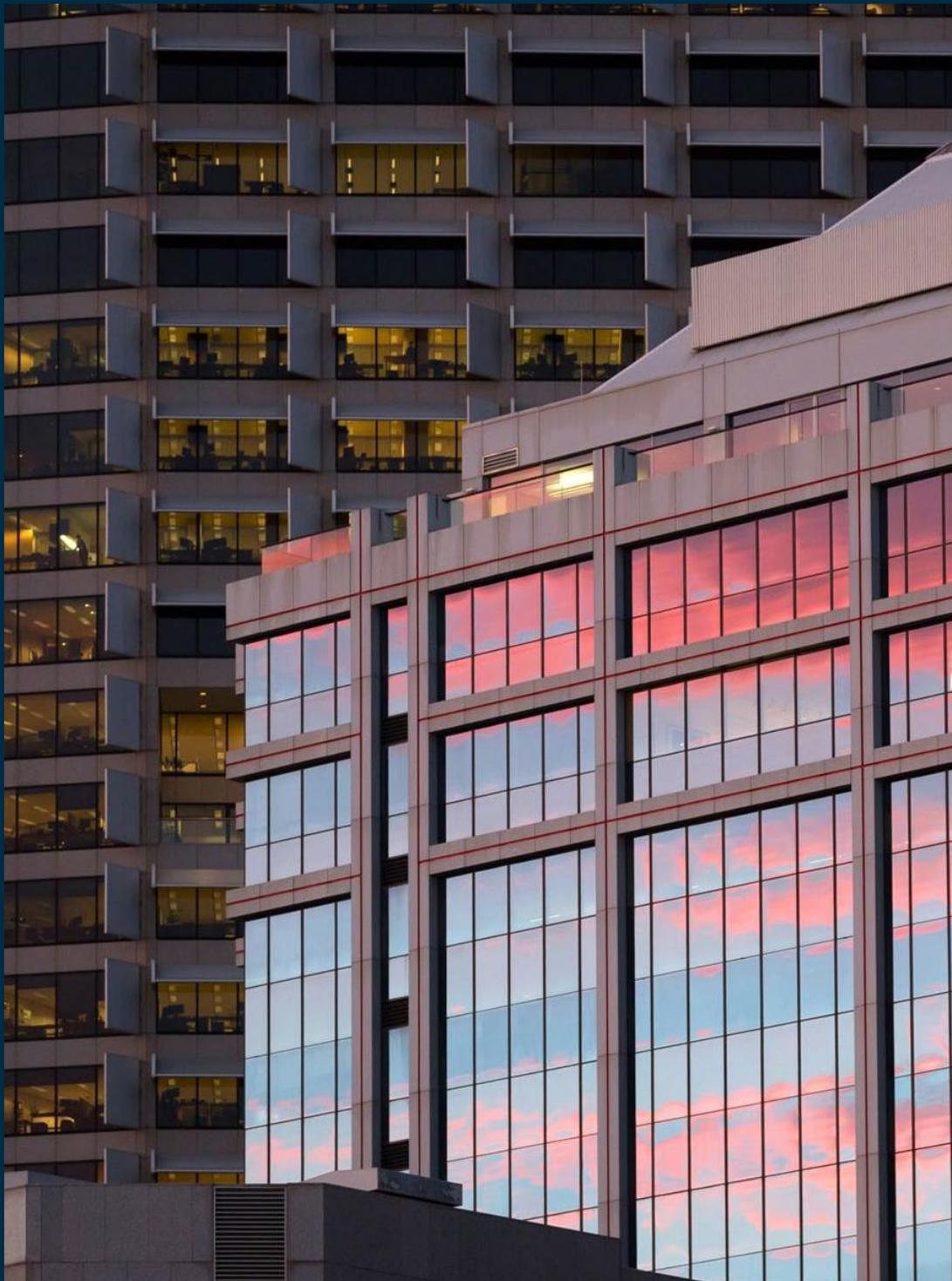


- 1 =  **\$3.66 billion** in Transport, accounting for **43%** of the pipeline
The wave – Advanced Stages
- 2 =  **\$3.02 billion** in Residential investment, accounting for **35%** of the pipeline
Aura
Aura South
Twin Waters West
- 3 =  **\$1.54 billion** in Mixed Use/Commercial investment, accounting for **18%** of the pipeline
Maroochydore City Centre
Birtinya Masterplan
Sunshine Coast Airport
- 4 =  **\$370 million** in Tourism investment, accounting for **4%** of the pipeline
Sunshine Coast Arena

Infrastructure Pipeline

Who is Investing?





How do we fill the gap post 2032?

*How to maximise
our position?*

Understanding the risks

Significant investment provides a golden opportunity to drive the Sunshine Coast forward, the region must also navigate growing that could impact the region's ability to fully capitalise on this transformative period.



People:
Labour Shortages

Pipeline Delivery:
Project Delays and Proceeding Risk



Strategic Fit:
Regional Economic Development Strategy

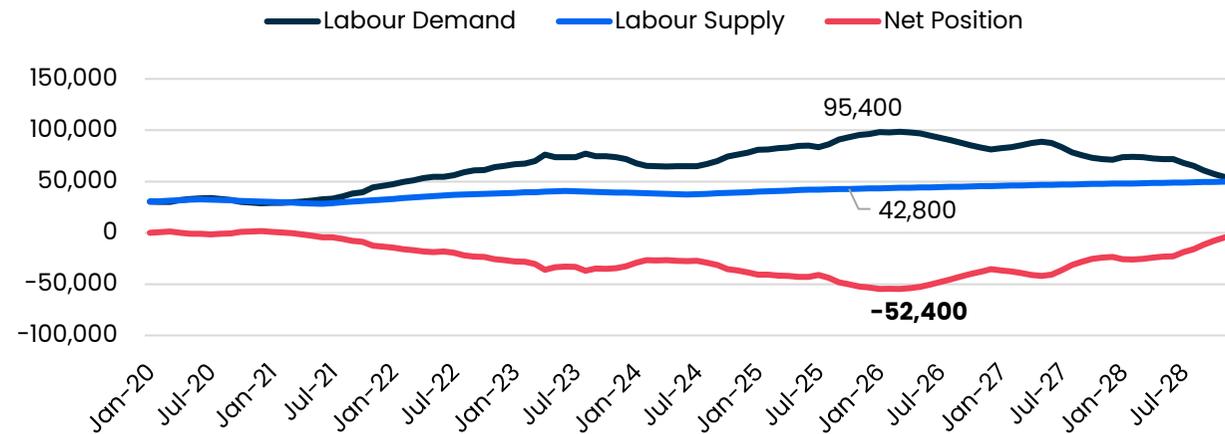
Place and Community:
Housing Supply



Labour Shortages

People:
Labour Shortages

Queensland Labour Supply and Demand



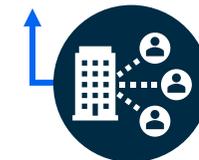
Source: Infrastructure Australia

Government, 2032 Olympic and Paralympic Games and Major Projects



Significant labour force requirement

Labour Force Uptake



Challenges in the private sector: costs, competition for talent and delivery timeframes

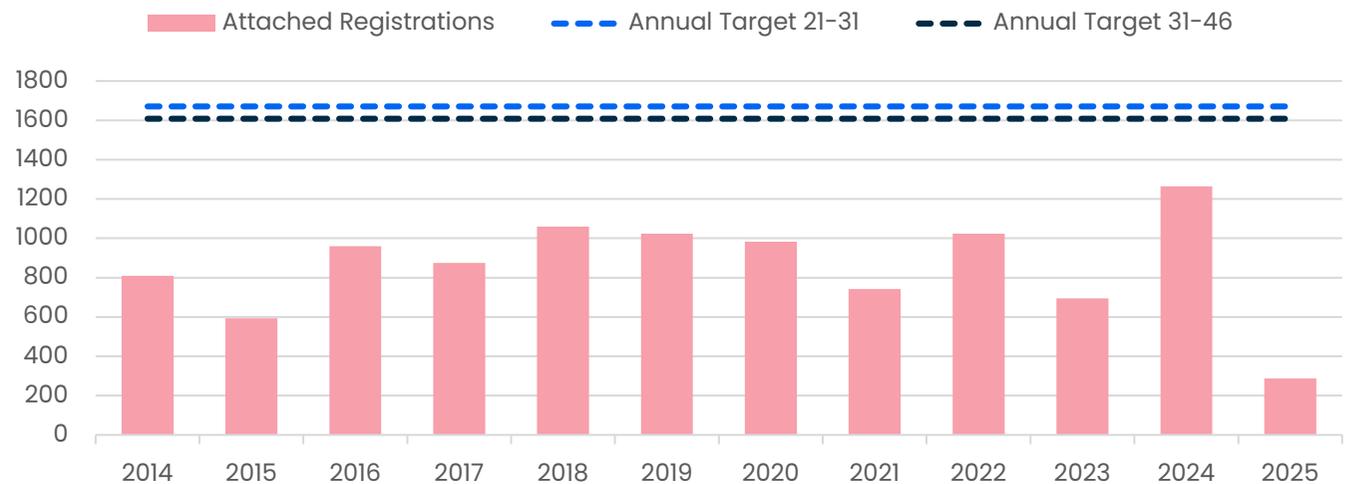
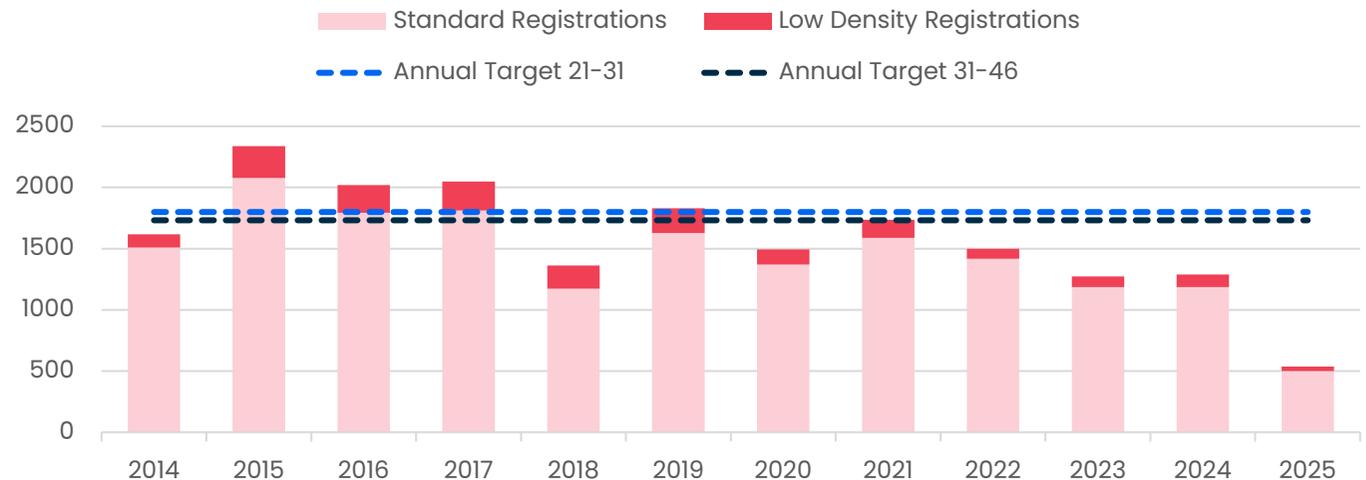
Risk of project deferment if resources are tied up in Olympic infrastructure and public works

Place and Housing

Place and Community: Housing Supply

Housing Undersupply even more at risk

- Heavy-lifting being done by the detached housing market, largely the master-planned communities
- Detached housing market selling down in the two biggest master plans – with limited committed supply beyond 2032
- Attached housing well below SEQRP targets, risk that demand/supply gap will widen in the coming period



Pipeline Delivery Risk

Pipeline Delivery:
Project Delays and Proceeding Risk

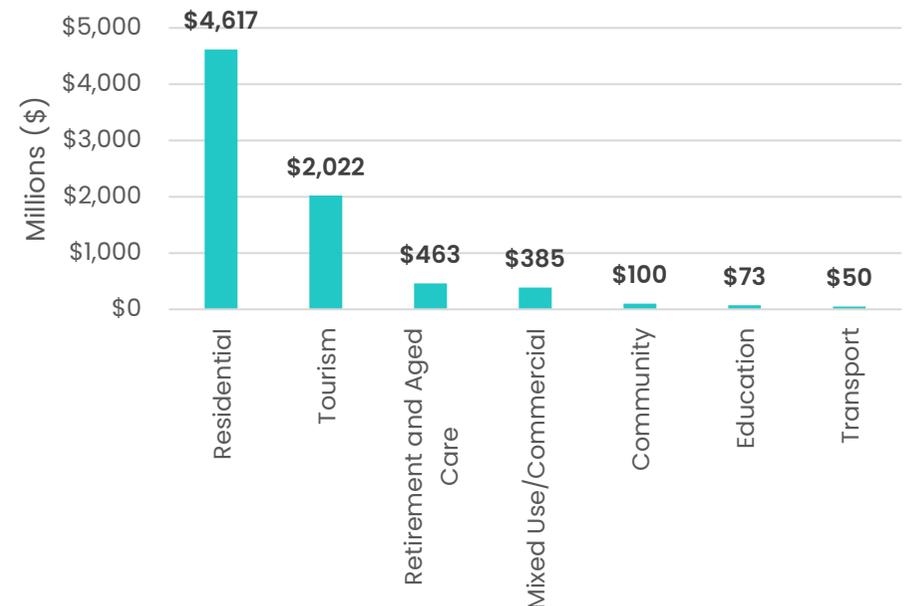
18%
of the Pipeline has not commenced or is uncommitted

Equating to
\$7.6 billion



Key At Risk Categories

- **\$4.6 billion** in Residential projects could be significantly affected by rising construction costs and labour shortages, particularly for infill and mixed-use developments.
- **\$1 billion** in Tourism infrastructure (largely hotels) are crucial in the lead-up to the Games and is central to the Sunshine Coast's role in delivering a successful 2032 Olympic and Paralympic Games.
- **\$1 billion** in key industries forming the overall long-term success of the Sunshine Coast, such as **Retirement, Community and Education** are at risk.



Strategic Fit:
Regional
Economic
Development
Strategy

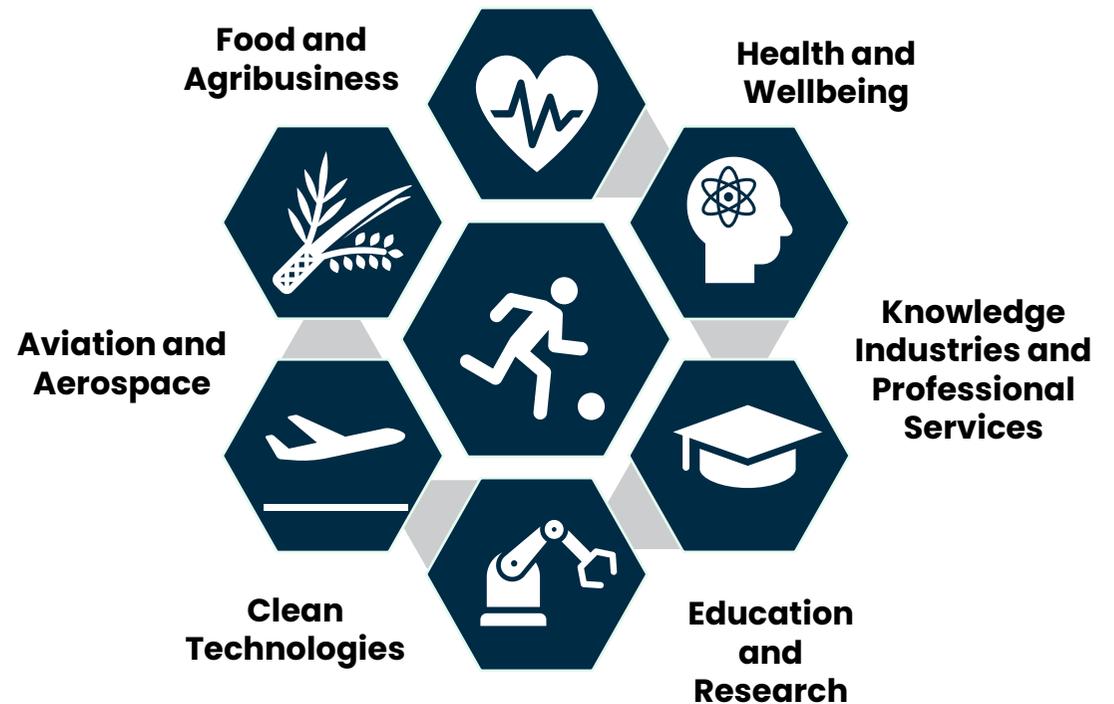
Strategic Fit: **Sunshine Coast Regional Economic Development Strategy**

Jobs in high value industries → Risk: delayed projects and labour pull reduce job creation speed and sector maturity.

Attract investment & enable business growth → Risk: cost inflation and delivery uncertainty lower investor appetite.

Infrastructure & precinct development (industrial/education/health sites) → Risk: industrial land activation stalls, precinct timelines slip, and housing shortages hamper workforce attraction.

Key Future Growth Opportunities





Shaping cities
and communities
for a better future.