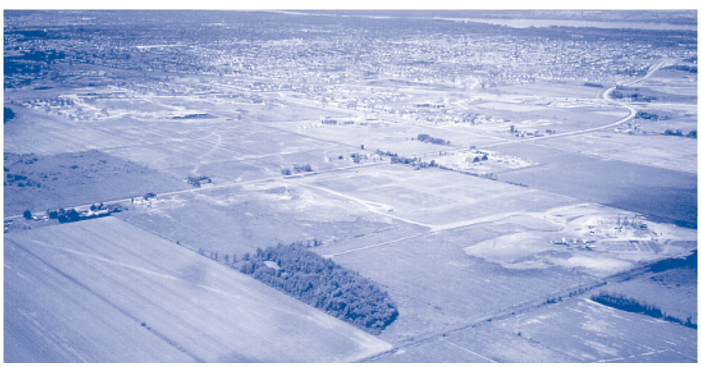
PLANNING AND GROWTH MANAGEMENT
URBANISME ET GESTION DE LA CROISSANCE

VACANT URBAN RESIDENTIAL LAND SURVEY

2014 UPDATE



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Planning and Growth Management
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Vacant Urban Residential Land Survey

2014 Update

City of Ottawa
Planning and
Infrastructure

Planning and Growth
Management Department

Policy Development and
Urban Design Branch

October 2015

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A map and detailed parcel list are available on request from the City of Ottawa Client Service Centre at 613-580-2400.

VACANT URBAN RESIDENTIAL LAND SURVEY
2014 UPDATE

1. INTRODUCTION

The Vacant Urban Residential Land Survey (VURLS) monitors the supply of vacant land in Ottawa's urban area to assess whether it meets the policies of the Official Plan and the Provincial Policy Statement[1]. The survey has been undertaken annually since 1982.

2. HIGHLIGHTS

- The inventoried supply of vacant urban residential land and its unit potential stood at 2,181 net hectares (ha) and approximately 86,900 units at the end of 2014[2]. This provides for well beyond the minimum 10-year requirement of the Provincial Policy Statement (PPS).

- At projected consumption rates, the total vacant urban residential land supply is sufficient to at least 2038.

- The supply of registered and draft approved vacant land with servicing in 2014 (593 ha) represents a 6.0 year supply based on projected demand. This significantly exceeds the PPS requirement for a three-year supply of serviced registered and draft approved lots.

- Total serviced land supply is sufficient for about 16.6 years based on average demand over the past five years. By area, serviced supply is: Riverside South 66.7 years; Orléans 17.3 years; Kanata-Stittsville 16.4 years; Leitrim 10.4 years; and South Nepean 6.2 years.

- Consumption of urban residential land totalled 96 ha in 2014, below the five year average of 100 ha. Dwellings built on this land totalled 3,692 units, slightly above the five-year average of 3,663 units.

- The average density of housing built on land surveyed in 2014 was 38.5 units/net ha (upnh). This is higher than the 2012 and 2013 figures of 37.6 and 37.5 upnh, respectively, making it the highest ever recorded by the survey.

- Vacant land supply shares by area:
  - Kanata-Stittsville 37%
  - Orléans 22%
  - Riverside South 21%
  - South Nepean 13%
  - Leitrim 6%

[1] Note: A detailed parcel list and accompanying map are also available showing unit potential, approval status and other information for each parcel. Contact City Client Service Centre at 580-2400 for copies.
[2] Note: Supply inside the Greenbelt is not included in the 2014 Vacant Urban Residential Land Survey.

The ten largest landowners held 65% of the residential land supply in 2014: Riverside South Development Corporation (16%), Minto Group (9%), Mattamy Homes (8%), Richcraft Homes (7%), Tamarack Homes (6%), KNL Development (5%), The Regional Group (5%), Claridge Homes (4%), CRT Developments (4%), and Tartan Homes (3%).

The Annex to this report presents the supply, development potential and planned density of development of vacant urban residential land inside and outside the Greenbelt.

Figure 1
Land Consumption, 1983-2014

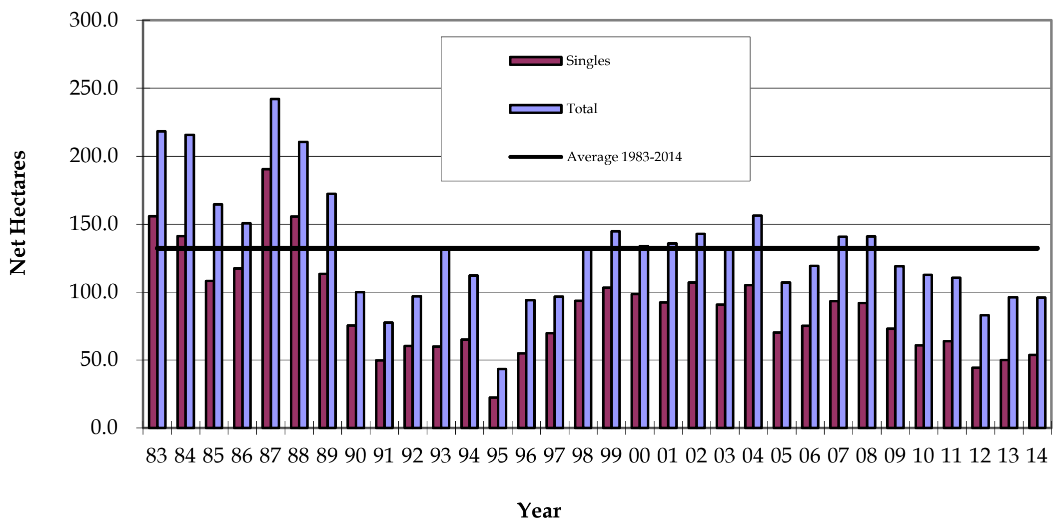
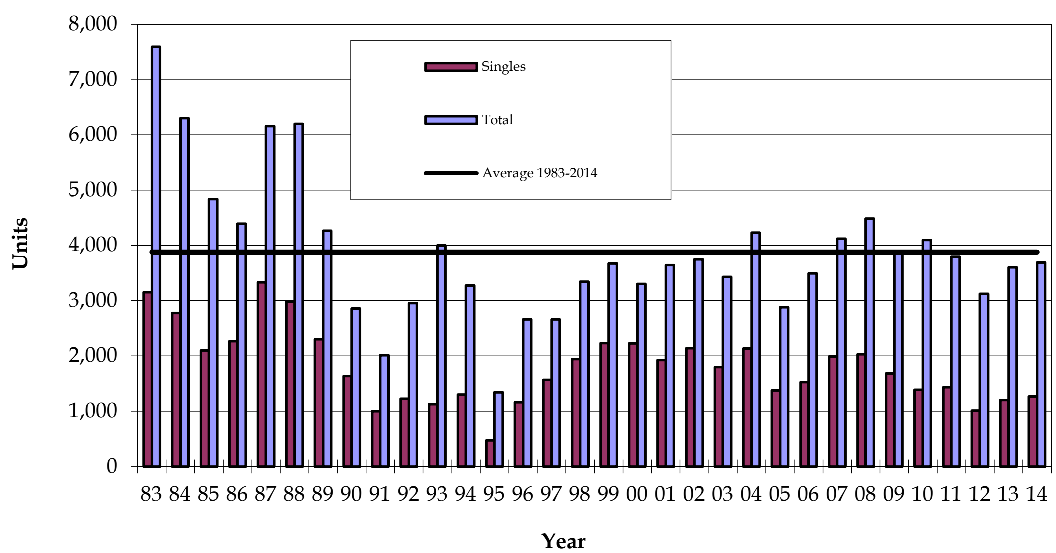


Figure 2
Unit Construction, 1983-2014



3. PURPOSE OF THE SURVEY

This report describes the vacant urban residential land supply in Ottawa and the estimated number of dwelling units that can be developed on it. The purpose of the survey is to:

- Assess total supply and serviced registered and draft approved supply against the Provincial Policy Statement;
- Monitor the supply of vacant urban residential land for "greenfield" development on an annual basis;
- Monitor the consumption of land and built densities by unit type and sub-area;
- Estimate unit potential by housing type and density on vacant land in the near and medium term;
- Compare the supply of residential land with future demand;
- Monitor land ownership patterns by area.

4. METHODOLOGY

Lands surveyed are those designated "Urban Area" on Schedule A of the Official Plan, including amendments approved by Council up to December 2014. Lands considered to have development potential are those parcels of vacant residential[1] land greater than 0.8 net hectares in size. Smaller parcels are included if they are remnants of parcels included in previous years' surveys. Lands inside the Greenbelt are not included in the 2014 survey as all potential is some form of intensification defined as per the City's Official Plan rather than greenfield development.

Land parcels in the survey are described by the following variables:

- Parcel size in net hectares (ha) to the nearest 0.01 ha (1 ha = 2.47 acres);
- Unit potential by structure type, where known;
- Average density in units/net ha. Net refers to land in exclusively residential use (i.e. building lots), including driveways, lanes and parking areas internal to developments but excluding public streets, road rights-of-way and all non-residential uses;
- Planning status of subdivisions (registered, draft approved, etc);
- Ownership, based on assessment data; and
- Planning sub-area (South Nepean, Orléans, etc).

Land parcels defined on the basis of ownership are the basic units of observation. Within each parcel, land is categorized according to subdivision approval status. Field surveys, municipal records, plans of subdivision and condominium, the Official Plan, Community Design Plans, zoning, site plans, assessment data, and land registry records are all used to compile the inventory of parcels and their characteristics.

Housing unit types are defined as follows:

<u>Single-detached</u>: A single dwelling unit not attached to any other building;

[1] Vacant residential land in this survey includes lands approved for residential development based on the most detailed, approved planning document for the subject parcel. In order of detail, from the most specific to the most general, planning approvals range from site plans, plans of subdivision and condominium, the zoning by-law, Community Design Plans and the Ottawa Official Plan.

Semi-detached: One of two dwelling units attached to a single neighbouring unit by a vertical common wall;
Townhouse: One of three or more dwelling units joined side by side without having any other dwellings above or below;
Stacked Townhouse: A building with six or more units attached side by side, two units high; and
Apartment: One of two or more dwelling units attached vertically and horizontally, typically with shared external access, including duplexes.

5. ANALYSIS

5.1 Land Demand

Land Consumption Trends

In 2014, land consumption totalled 95.8 ha, lower than the five-year average of 99.6 ha per annum (Table 1 and Figure 1). Singles and townhouse units accounted for 90% of land developed, consuming 56% and 34% of vacant urban residential land respectively.

Table 1. Vacant Urban Residential Land Consumption, 2008-2014 (net ha)

	Year							
Unit Type	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**Avg. 2010-2014**
Single-detached	92.0	73.0	60.8	63.9	44.3	49.9	53.8	54.5
Semi-detached	3.0	5.2	6.8	6.4	5.0	5.4	3.3	5.4
Townhouse	40.9	36.7	36.2	33.8	27.7	32.3	32.2	32.4
Stacked Townhouse	3.5	3.1	6.4	4.7	4.3	3.5	4.1	4.6
Apartment	1.5	1.0	2.6	1.6	1.8	5.1	2.5	2.7
Total	**140.9**	**119.0**	**112.7**	**110.4**	**83.1**	**96.1**	**95.8**	**99.6**

With 3,692 housing starts in 2014, total starts are tracking closely to the five-year average of 3,663 starts per annum (Table 2 and Figure 2). Although singles consumed more land in 2014, townhouses are the most popular unit type being developed. Compared to the five-year averages, there was a noticeable increase in the number of townhouse units (1,610 units vs. 1,488 units) and a decrease in semi-detached units (120 units vs. 192 units) built.

Table 2. Units Built on Vacant Urban Residential Land, 2008-2014

	Year							
Unit Type	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**Avg. 2010-2014**
Single-detached	2,032	1,683	1,388	1,434	1,013	1,204	1,263	1,260
Semi-detached	92	164	232	226	172	208	120	192
Townhouse	1,835	1,671	1,571	1,510	1,231	1,518	1,610	1,488
Stacked Townhouse	278	242	460	386	382	195	302	345
Apartment	246	125	447	242	326	479	397	378
Total	**4,483**	**3,885**	**4,098**	**3,798**	**3,124**	**3,604**	**3,692**	**3,663**

Source: CMHC Starts

Table 3a shows the distribution of land developed in 2014. Kanata-Stittsville led all areas with 36% of total land developed, with South Nepean at a close second with 33% (Table 3a). At only 15% of land developed, Orléans continued to retract from its five-year high of 29% of total land developed recorded in 2011.

Table 3a								
Vacant Land Developed by Area, 2008-2014 (net ha)								
Area	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**5-Year Avg. 2010-2014**
Kanata-Stittsville	54.8	36.0	39.0	29.7	22.7	37.5	34.0	32.6
% of Total	*38.9%*	*30.2%*	*34.6%*	*26.9%*	*27.4%*	*39.0%*	*35.5%*	*32.7%*
South Nepean	39.6	39.2	32.0	38.1	23.8	25.9	31.4	30.2
% of Total	*28.1%*	*32.9%*	*28.4%*	*34.5%*	*28.6%*	*27.0%*	*32.7%*	*30.3%*
Riverside South	8.5	5.3	5.9	3.3	7.1	9.8	9.1	7.0
% of Total	*6.0%*	*4.4%*	*5.2%*	*3.0%*	*8.6%*	*10.2%*	*9.4%*	*7.1%*
Leitrim	3.8	8.3	9.1	7.9	9.5	8.0	7.0	8.3
% of Total	*2.7%*	*6.9%*	*8.1%*	*7.2%*	*11.5%*	*8.3%*	*7.3%*	*8.3%*
Orléans	34.2	30.3	26.7	31.4	19.9	15.0	14.4	21.5
% of Total	*24.3%*	*25.5%*	*23.7%*	*28.5%*	*24.0%*	*15.6%*	*15.0%*	*21.6%*
Total	**140.9**	**119.0**	**112.7**	**110.4**	**83.0**	**96.1**	**95.8**	**99.6**
Total %	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***

Note: Land areas and percentages may not add due to rounding

Reflective of Table 3a, Kanata-Stittsville and South Nepean averaged the highest number of units built during 2014, at 1,406 and 1,065 units respectively (Table 3b). Although the two areas maintained their respective position as per Table 3a, Kanata-Stittsville's higher density development resulted in more units per hectare in comparison to South Nepean. Riverside South (333 units), Leitrim (266 units), and Orléans (620 units) all experienced minor declines from 2013.

Table 3b								
Units Built on Vacant Land by Area, 2008-2014 (net ha)								
Area	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**5-Year Avg. 2010-2014**
Kanata-Stittsville	1,790	1,126	1,313	909	950	1,396	1,406	1,195
% of Total	*39.9%*	*29.0%*	*32.0%*	*23.9%*	*30.4%*	*38.7%*	*38.1%*	*32.6%*
South Nepean	1,247	1,333	1,420	1,455	922	933	1,065	1,159
% of Total	*27.8%*	*34.3%*	*34.7%*	*38.3%*	*29.5%*	*25.9%*	*28.9%*	*31.6%*
Riverside South	322	155	168	60	197	337	333	219
% of Total	*7.2%*	*4.0%*	*4.1%*	*1.6%*	*6.3%*	*9.4%*	*9.0%*	*6.0%*
Leitrim	83	264	289	237	279	282	266	271
% of Total	*1.9%*	*6.8%*	*7.1%*	*6.2%*	*8.9%*	*7.8%*	*7.2%*	*7.4%*
Orléans	1,041	1,007	908	1,137	776	656	620	819
% of Total	*23.2%*	*25.9%*	*22.2%*	*29.9%*	*24.8%*	*18.2%*	*16.8%*	*22.4%*
Total	**4,483**	**3,885**	**4,098**	**3,798**	**3,124**	**3,604**	**3,690**	**3,663**
Total %	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0%***

Source: CMHC starts

Note: Percentages in Tables 3a and 3b may not add due to rounding.

Densities

The average net density[1] of development since 2008 has ranged between 31.8 and 38.5 units per net ha (upnh) (Table 4). After attaining a new high of 37.6 upnh in 2012, the overall average density continued its rise to reach 38.5 upnh in 2014, the highest average density recorded since monitoring began in 1983.

Table 4

Built Densities on VURLS Parcels, 2008-2014 (units per net hectare)

Unit Type	2008	2009	2010	2011	2012	2013	2014	5-Year Weighted Average* 2010-2014
Single-detached	22.1	23.1	22.8	22.4	22.9	24.1	23.5	23.1
Semi-detached	30.7	31.6	34.2	35.5	34.2	38.3	36.9	35.7
Townhouse	44.9	45.5	43.4	44.7	44.4	47.0	50.0	45.9
Stacked Townhouse	79.2	77.3	72.3	81.4	89.7	56.2	74.2	75.3
Apartment	162.9	131.6	173.9	148.5	185.2	94.5	156.9	139.5
Weighted Average	**31.8**	**32.7**	**36.4**	**34.4**	**37.6**	**37.5**	**38.5**	**36.8**

* Weighting divided the sum of units built by the sum of hectares developed

The breakdown of annual development density by area and unit type is provided in Tables 5 to 8 for the 2008 to 2014 period.

In 2014, the average density of single-detached units decreased from 24.1 upnh in 2013 to 23.5 upnh (Table 5). With small year-over-year retractions in Kanata-Stittsville, South Nepean, and Orléans, and increases in Riverside South and Leitrim, differences between areas are generally becoming less marked.

Table 5

Single-Detached Development Densities, 2008-2014 (units per net hectare)

Area	2008	2009	2010	2011	2012	2013	2014	5-Year Weighted Average 2010-2014
Kanata-Stittsville	22.9	21.8	20.5	20.7	21.5	24.6	23.7	22.5
South Nepean	22.2	24.9	25.2	22.8	23.1	24.2	23.2	23.7
Riverside South	22.0	22.9	21.8	17.6	18.9	21.6	21.7	20.5
Leitrim	17.8	19.7	21.7	21.3	22.6	21.9	24.4	22.3
Orléans	21.4	22.6	23.8	24.7	24.9	25.6	24.2	24.5
Weighted Average	**22.1**	**23.1**	**22.8**	**22.4**	**22.9**	**24.1**	**23.5**	**23.1**

Semi-detached units developed at an average of 36.9 upnh in 2014, a decrease from 2013 (38.3 upnh), but still above the five-year average of 35.7 upnh (Table 6a).

[1] Net residential density is based on the land area in exclusively residential use (i.e. building lots), including driveways and parking areas internal to developments but excluding public streets, road rights-of-way and all non-residential uses.

Table 6a								
Semi-Detached Development Densities, 2008-2014 (units per net hectare)								
Area	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**5-Year Weighted Average 2010-2014**
Kanata-Stittsville	30.8	28.8	31.3	35.5	37.0	35.9	35.7	34.8
South Nepean	20.0	35.7	38.1	35.7	33.3	38.2	36.9	36.4
Riverside South	-	-	33.3	-	-	-	-	33.3
Leitrim	37.5	35.4	34.4	35.0	36.4	37.9	40.0	36.2
Orléans	42.9	30.0	27.3	36.0	25.9	46.8	33.3	33.5
Weighted Average	**30.7**	**31.6**	**34.2**	**35.5**	**34.2**	**38.3**	**36.9**	**35.7**

In 2014, the density of townhouses (Table 6b), rose from 47 upnh in 2013 to 50 upnh. Densities for this unit type increased in every area except South Nepean and Leitrim.

Table 6b								
Townhouse Development Densities, 2008-2014 (units per net hectare)								
Area	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**5-Year Weighted Average 2010-2014**
Kanata-Stittsville	43.8	43.2	39.8	41.9	41.4	49.3	54.0	44.7
South Nepean	50.9	49.2	48.4	44.3	53.1	50.5	47.5	48.5
Riverside South	40.8	43.4	42.0	44.4	35.3	39.1	43.1	39.6
Leitrim	34.8	47.5	43.6	48.6	43.9	46.8	44.7	45.6
Orléans	41.6	45.1	45.4	47.4	45.7	44.1	54.9	47.3
Weighted Average	**44.9**	**45.5**	**43.4**	**44.7**	**44.4**	**47.0**	**50.0**	**45.9**

Stacked townhouse densities increased to 74.2 upnh in 2014 (Table 6c). Since the number of stacked townhouses built on VURLS parcels is relatively small, individual projects typically produce substantial annual variations.

Table 6c								
Stacked Townhouse Development Densities, 2008-2014 (units per net hectare)								
Area	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**5-Year Weighted Average 2010-2014**
Kanata-Stittsville	75.0	-	61.5	65.0	93.2	66.7	58.3	70.7
South Nepean	93.0	93.5	83.3	86.0	86.1	65.3	81.5	82.5
Riverside South	86.2	107.7	62.5	-	-	87.5	75.0	75.0
Leitrim	75.0	75.0	70.6	-	-	-	74.1	72.3
Orléans	60.9	54.2	61.3	81.7	90.6	49.1	90.6	69.3
Weighted Average	**79.2**	**77.3**	**72.3**	**81.4**	**89.7**	**56.2**	**74.2**	**75.3**

Apartment densities (Table 7) averaged 156.9 upnh, up from 2013 (94.5 upnh) and above the five-year average of 139.5 upnh. As with stacked townhouses, apartment densities often experience substantial changes from year-to-year.

Table 7								
Apartment Development Densities, 2008-2014 (units per net hectare)								
Area	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**5-Year Weighted Average 2010-2014**
Kanata-Stittsville	369.4	-	317.4	-	238.9	131.6	287.4	212.8
South Nepean	-	81.3	142.7	153.5	139.0	106.7	37.3	129.6
Riverside South	-	-	-	-	-	88.4	-	88.4
Leitrim	-	-	-	-	-	-	-	-
Orléans	98.3	141.8	-	114.3	154.0	70.6	91.6	88.6
Weighted Average	**162.9**	**131.6**	**173.9**	**148.5**	**185.2**	**94.5**	**156.9**	**139.5**

Except for the density decrease in South Nepean, all areas outperformed their respective five-year average density in 2014 (Table 8).

Table 8								
Total Development Densities (all unit types), 2008-2014 (units per net hectare)								
Area	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**5-Year Weighted Average 2010-2014**
Kanata-Stittsville	32.7	31.3	33.7	30.6	41.8	37.2	41.4	36.7
South Nepean	31.5	34.0	44.3	38.2	38.8	36.0	33.9	38.3
Riverside South	37.8	29.4	28.4	18.3	27.6	34.5	36.8	31.2
Leitrim	22.1	32.0	31.7	29.8	29.3	35.4	38.3	32.6
Orléans	30.4	33.2	34.1	36.2	39.0	43.8	43.1	38.2
Weighted Average	**31.8**	**32.7**	**36.4**	**34.4**	**37.6**	**37.5**	**38.5**	**36.8**

10 Year Demand Projection

New housing requirements for the 2015-2024 decade are projected to average 5,943 units per year, including units required for a vacancy rate and to replace demolished units.

Housing demand will be met through a combination of intensification, units built in the rural area (9% of new units), and construction on vacant urban land. Intensification targets over the decade average 40.2% of new urban units (based on the Official Plan). As shown in Table 9, construction on vacant urban land is projected to be approximately 3,237 units annually.

Table 9		
Projected Housing Demand in Ottawa, 2015-2024*		
	10 year Requirement	Annual Requirement
Total Unit Requirements	**59,434**	5,943
Allowance for rural units (9% of new hhlds)	-5,349	-535
Total Urban Demand	**54,085**	5,409
Allowance for intensification (40.2%)	-21,717	-2,172
Unit demand on Vacant Urban Residential Land	**32,368**	**3,237**

*Note: based on OP policies and Residential Land Supply and Demand to 2031: 2012 Update report, Nov. 2012

Combining the demand projection from Table 9 with the dwelling type mix from the 2012 Residential Land Supply and Demand update report and applying the average density of the last five years (Table 4) results in a projected urban residential land requirement of 98.0 net ha per year over the next decade, as set out in Table 9a.

Table 9a			
Annual Demand for Housing on VURLS Land, 2015-2024			
Type	**Units**	**Density**	**Land (ha)**
Single-detached	1,418	23.1	61.4
Semi-detached	206	35.7	5.8
Townhouses	1,269	45.9	27.6
Stack towns/Apartments	343	107.4	3.2
Total	**3,237**		**98.0**

Note: Stacked townhouses/Apartments density is an average of the two unit types

5.2 Land Supply

The supply of vacant residential land and number of units it is planned for are shown in Table 10. As of December 2014, there were 2,181 ha of vacant residential land in the urban area of Ottawa, with a total estimated development potential of 86,903 units.

Plan Status
Table 10 shows the approval status of land parcels. Four categories are noted:

- Registered subdivision plans: final approval (building permits can be issued)
- Draft approved plans: provisional approval (subject to clearance of conditions)
- Pending applications: plan submitted but no approval given
- No plan: no application has been submitted

As of December 2014, 29% of the land supply was in registered and draft approved plans (9% registered, 20% draft approved). Of the remaining land, 13% had pending submissions and 58% had no plan.

Kanata-Stittsville accounted for 37% of the total land supply, Orleans 22%, Riverside South 21%, South Nepean 13%, and Leitrim 6%.

Table 10										
Urban Residential Land Supply and Unit Potential by Development Status and Area, December 2014										
	Development Status									
	Registered		**Draft Approved**		**Pending**		**No Plan**		**Total**	
Area	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***
Kanata-Stittsville	80.1	3,414	220.6	6,745	113.7	4,025	386.7	13,807	801.1	27,991
South Nepean	55.5	2,671	18.9	953	24.2	1,440	191.9	15,360	290.5	20,424
Riverside South	15.7	559	34.9	1,208	74.1	3,650	342.4	10,591	467.1	16,008
Leitrim	14.9	491	48.5	1,423	37.7	1,343	32.0	1,088	133.0	4,345
Orléans	31.6	1,701	103.4	4,093	38.7	1,193	315.7	11,149	489.5	18,136
Total	**197.8**	**8,836**	**426.2**	**14,422**	**288.4**	**11,651**	**1,268.7**	**51,994**	**2,181.2**	**86,903**

Land Ownership

The holdings of the ten largest landowners (Table 11) outside the Greenbelt increased to 65% of total vacant land in 2014, from 64% in 2013. In 2014, the five largest landowners were Riverside South Development Corporation (RSDC) (16% of the total land supply), Minto (9%), Mattamy (8%), Richcraft (7%) and Taggart/Tamarack (6%).

The effective share of land controlled by several of the major landowners in Tables 11 and 12 is understated as several jointly own large land-owning companies. For example, KNL Developments and RSDC are jointly owned by Richcraft and Urbandale. CRT Developments is owned by Claridge, Richcraft and Tamarack. When added to their assumed half share of KNL and RSDC land, and factoring in a third of CRT Developments, Richcraft increases its share of land to an estimated 18%.

Table 11

Share of Total Vacant Urban Land of 10 Largest Landowners, 2010-2014

	Net Hectares Owned					**% of all Vacant Urban Land**				
Owner Name	**2010**	**2011**	**2012**	**2013**	**2014**	**2010**	**2011**	**2012**	**2013**	**2014**
Riverside South Dev. Corp.	-	-	-	346.8	340.6				15.5	15.6
Minto Group	218.4	189.2	208.8	204.7	197.9	10.0	9.5	8.8	9.2	9.1
Mattamy Homes	143.2	124.1	124.4	117.2	179.4	6.6	6.2	5.2	5.2	8.2
Richcraft Homes	289.6	241.4	238.2	164.6	149.6	13.3	12.1	10.0	7.4	6.9
Taggart/Tamarack Homes	82.5	74.7	133.7	128.0	122.7	3.8	3.7	5.6	5.7	5.6
KNL Developments	116.9	113.8	113.3	106.4	106.4	5.4	5.7	4.8	4.8	4.9
The Regional Group	-	-	-	104.5	99.3				4.7	4.6
Claridge Homes/Tenth Line	105.4	95.5	118.8	109.4	77.0	4.8	4.8	5.0	4.9	3.5
CRT Developments Inc.	89.2	76.4	76.4	76.4	76.4	4.1	3.8	3.2	3.4	3.5
Tartan Homes	77.1	47.7	59.9	73.5	64.9	3.5	2.4	2.5	3.3	3.0
Ashcroft Homes	80.4	74.8	72.6	-	-	3.7	3.7	3.0		
Urbandale Construction	235.7	227.0	234.8	-	-	10.8	11.4	9.9		
Total, Top 10 Owners	**1,438.4**	**1,264.6**	**1,380.9**	**1,431.5**	**1,414.2**	**66.1**	**63.4**	**57.9**	**64.0**	**64.8**
Total Vacant Land	**2,176.2**	**1,994.9**	**2,383.3**	**2,236.4**	**2,181.2**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Table 12 shows the ownership and planning status of major land holdings of 10 net ha or more in each major area. The 22 owners listed in the table controlled about 87% of the supply at the end of 2014. Due to the difficulty of verifying ownership, caution is advised when interpreting these data.

Major Landowners by Area (Table 12)

Kanata-Stittsville: Major owners were KNL (14%), CRT Developments (10%), Richcraft (9%), and Regional (7%). The 19 owners with 10 or more ha accounted for 88% of the total land supply.

South Nepean: Three owners accounted for 64% of the vacant land; Minto (27%), Mattamy (26%), and Taggart/Tamarack (11%). There were six owners with 10 or more ha, accounting for 77% of the total supply.

Riverside South: The largest landowner in Riverside South was the RSDC partnership of Urbandale and Richcraft which owned 73% of the vacant land. Overall, the six listed in Table 12 owned 96% of the land supply.

Leitrim: Tartan and Regional held 35% and 31% of the supply respectively, in total accounting for 66% of Leitrim land. The four major owners had 92% of the supply.

Orléans: Four owners controlled 59% of the land supply; Taggart (16%), Minto (16%), Mattamy (15%) and Claridge (12%). The seven major owners held 81% of the supply.

Table 12

Residential Land Supply of Major Landowners (10 net ha and larger) by Area and Development

Area	Owner Name	Registered	Draft Approved	Pending	No Plan	Total (net ha)
Kanata-Stittsville	KNL Developments	0.4	106.0	-	1.4	107.8
	CRT Developments	-	30.7	-	45.8	76.4
	Richcraft Homes	0.3	16.3	21.5	35.4	73.4
	The Regional Group	9.6	28.0	20.9	-	58.5
	Del	-	-	-	52.4	52.4
	Monarch Group	17.6	-	1.4	32.3	51.3
	Minto Group	4.2	7.5	12.6	20.7	45.0
	M & A Rentals	-	-	-	38.2	38.2
	Metcalfe Realty	-	-	-	29.7	29.7
	Junic/Multivesco	-	-	-	23.9	23.9
	Valecraft Homes/Rivard, J.G.	-	-	-	21.7	21.7
	Davidson, William	-	-	-	19.3	19.3
	Tartan Homes	-	-	18.9	-	18.9
	Mattamy Homes	1.5	-	17.0	-	18.5
	Caivan Development	17.8		-	-	17.8
	Urbandale Construction	13.3	-	-	2.1	15.4
	Tamarack Homes	-	15.3	-	-	15.3
	Kavanaugh	-	-	-	11.5	11.5
	Claridge Homes	6.1	-	-	4.9	11.0
South Nepean	Minto Group	2.8	3.3	11.9	59.1	77.1
	Mattamy Homes	16.5	-	6.6	52.8	75.9
	Taggart/Tamarack Homes	9.2	10.3	-	11.1	30.6
	Richcraft Homes	3.1	-	2.4	11.3	16.8
	Kennedy, Patrick	-	-		12.9	12.9
	Monarch Group	10.6	0.6	-	-	11.2
Riverside South	Riverside South Development Corp.	7.9	34.3	74.1	224.4	340.7
	Hakim, Antoine	-	-	-	32.1	32.1
	Claridge Homes	4.6	-	-	27.2	31.8
	Cardel Homes	-	-	-	19.7	19.7
	Richcraft Homes	3.0	-	1.6	10.5	15.1
	Mion, Luigi	-	-	-	10.7	10.7
Leitrim	Tartan Homes	4.1	19.3	22.5	-	45.9
	Regional Group/Letrim South Holdings	-	29.2	-	11.6	40.8
	Claridge Homes	-	-	-	20.4	20.4
	Urbandale Construction	-	-	15.1	-	15.1
	Tamarack/Jabbour, Hani/Robert Van.	0.7	35.9	-	40.1	76.7
Orléans	Minto Group	12.4	43.0	2.6	17.8	75.8
	Mattamy/Bisson, Marcel & Raymond	0.2	-	31.5	42.6	74.3
	Claridge Homes	-	-	-	58.9	58.9
	Richcraft Homes	1.5	7.1	-	37.0	45.6
	Ashcroft Homes	-	14.7	-	28.8	43.5
	Legault	0.8	-	-	20.8	21.6
Total (net ha)		**148.2**	**401.3**	**260.7**	**1,088.8**	**1,898.9**

Planned Density Compared with Development Density

Table 13 shows planned density by unit type as indicated on plans of subdivision. On registered, draft approved and pending lands, the planned density of all unit types except semi-detached units is lower than what was built over the last five years. However, given trends to higher densities it appears these will likely change as lands approach actual development.

Table 13				
Unit Potential and Density by Unit Type, 2014				
Registered, Draft Approved and Pending Lands				
Unit Type	**Units**	**% of Grand Total**	**Hectares**	**Units/Hectare**
Single-detached	7,839	9.0	345.2	22.7
Semi-detached	696	0.8	17.2	40.5
Townhouses	9,112	10.5	202.3	45.0
Stacked Townhouses	3,780	4.3	52.0	72.7
Apartments	5,062	5.8	50.9	99.4
Sub-total	*26,489*	*30.5*	*667.6*	*39.7*
Mixed Units	8,420	9.7	244.9	34.4
Total with Plans	**34,909**	**40.2**	**912.5**	**38.3**
No Plan Lands				
Mixed Units	51,994	59.8	1,268.7	41.0
Grand Total	**86,903**	**100.0**	**2,181.2**	**39.8**

5.3 2014 Provincial Policy Statement

The *Provincial Policy Statement* (PPS) contains policies for residential land to ensure that supply is sufficient. The policies in sections 1.4.1a and b of the 2014 PPS are unchanged from 2005.

a) Maintain at all times the ability to accommodate residential growth for a minimum of 10 years through *residential intensification* and *redevelopment* and, if necessary, lands which are *designated and available* for residential development.

The 2,181 ha in the inventory at the end of 2014 exceeded the 10 year PPS requirement. Based on projected demand of 98.0 net ha per year over the next decade and declining demand thereafter, the 2,181 net ha land supply outside the Greenbelt (land inside the Greenbelt being all intensification) would be sufficient for approximately 24 years.

b) Maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate *residential intensification* and *redevelopment*, and land in draft approved and registered plans.

Applying the projected annual demand for urban land of 98.0 ha (Table 9a), the serviced registered and draft approved land supply of 592.5 ha is sufficient for 6.0 years. This is double the PPS requirement for three years of serviced registered and draft approved land. This survey does not inventory most intensification land, so that aspect of PPS policy 1.4.1b is not assessed.

Servicing for registered and draft approved lands by area is shown in Table 14. (Note that in Tables 14 and 16 demand by area is estimated based on past absorption rates since demand has not been projected by sub-area. The past absorption rate of 99.6 ha per year is slightly higher than the projected 98.0 ha, making it a conservative estimate.) Conservatively, supply is sufficient for 8.3 years in Kanata-Stittsville, 2.5 years in South Nepean, 7.2 years in Riverside South, 7.6 years in Leitrim and 6.3 years in Orléans. Land is considered serviced if it is provided with trunk sewer and watermains with capacity available. Based on the past five-year consumption rate, the overall supply is 5.9 years (Table 14).

Table 14

Serviced Registered and Draft Approved Land, December 2014

Area	**Serviced Land Supply (net ha)**	**Average Annual Consumption (net ha)**	**Demand Years of Supply***
Kanata/Stittsville	269.2	32.6	8.3
South Nepean	74.5	30.2	2.5
Riverside South	50.5	7.0	7.2
Leitrim	63.3	8.3	7.6
Orléans	135.0	21.5	6.3
Total	**592.5**	**99.6**	**5.9**

*Based on average consumption rates over the last five years.

There is a 6.4 year supply of registered and draft approved lands (including lands that are currently not serviced) based on projected land consumption over the next decade (Table 15).

Table 15

Supply of Registered and Draft Approved Lands in December 2014, by Unit Type

Unit Type	**Registered and Draft Approved Land (net ha)**	**Projected Annual Consumption (net ha)**	**Demand Years of Supply**
Single-detached	249.1	61.4	4.1
Semi-detached	10.3	5.8	1.8
Townhouse	146.7	27.6	5.3
Stacks/Apartments	75.6	3.2	23.6
Mixed*	145.0	-	n/a
Total	**626.7**	**98.0**	**6.4**

*Most land with Mixed units will be developed for single-detached and townhouse units.

Tables 16 shows supply by area and the estimated number of demand years based on average consumption over the last five years. Based on the historical average, the overall supply of serviced residential land (1,649 ha) will be sufficient for 16.6 years. By area, servicing is adequate for about 16.4 years in Kanata-Stittsville, 6.2 years in South Nepean, 66.7 years in Riverside South, 10.4 years in Leitrim, and 17.3 years in Orléans.

Table 16

Serviced Land Supply and Consumption by Area, December 2014

Area	Serviced Land Supply (net ha)	Average Annual Consumption (net ha)	Demand Years of Supply*
Kanata/Stittsville	535	32.6	16.4
South Nepean	188	30.2	6.2
Riverside South	467	7.0	66.7
Leitrim	86	8.3	10.4
Orléans	373	21.5	17.3
Total	**1,649**	**99.6**	**16.6**

Based on average consumption rates over the last five years.

6. CONCLUSION

Overall, the supply of land for new housing in Ottawa at the end of 2014 met all policies of the Provincial Policy Statement for greenfield residential land. Ottawa's vacant residential land supply of 2,181 ha at the end of 2014 had an estimated potential for approximately 86,903 housing units. Based on projected annual consumption, the total suburban land supply is sufficient to approximately 2038.

ANNEX

URBAN RESIDENTIAL LAND SUPPLY, UNIT POTENTIAL AND APPROVAL STATUS BY AREA, DEC. 2014

KANATA-STITTSVILLE

HOUSING TYPE	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED-USE		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	34.59	728	1.30	34	12.82	691	4.32	240	11.83	1,172	17.67	660	82.54	3,525
Draft Approved	91.10	1,948	3.30	142	41.39	2,027	8.14	576	6.00	515	70.69	1,537	220.62	6,745
Pending	42.50	909	6.93	308	16.34	753	1.46	184	5.56	411	38.50	1,349	111.29	3,914
No Plan	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	386.74	13,807	386.74	13,807
TOTAL	168.19	3,585	11.53	484	70.55	3,471	13.92	1,000	23.39	2,098	513.60	17,353	801.19	27,991
% of Total	21%	13%	1%	2%	9%	12%	2%	4%	3%	7%	64%	62%	100%	100%
Density (u/ha)	21.3		42.0		49.2		71.8		89.7		33.8		34.9	

SOUTH NEPEAN

HOUSING TYPE	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED-USE		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	30.83	740	2.92	104	16.22	826	2.87	226	4.67	775	0.00	-	55.53	2,671
Draft Approved	8.27	174	0.50	20	5.20	190	1.63	134	0.00	-	3.33	435	18.93	953
Pending	9.79	303	0.00	-	6.40	339	5.92	498	2.09	300	0.00	-	24.20	1,440
No Plan	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	191.85	15,360	191.85	15,360
TOTAL	48.89	1,217	3.42	124	27.83	1,355	10.42	858	6.76	1,075	193.19	15,795	290.51	20,424
% of Total	17%	6%	1%	1%	10%	7%	4%	4%	2%	5%	67%	77%	100%	100%
Density (u/ha)	24.9		36.3		48.7		82.3		159.0		81.8		70.3	

RIVERSIDE SOUTH

HOUSING TYPE	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED-USE		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	8.19	167	0.00	-	5.64	258	1.87	134	0.00	-	0.00	-	15.68	559
Draft Approved	11.24	224	0.00	-	20.37	690	1.57	94	1.67	200	0.00	-	34.85	1,208
Pending	22.30	471	0.00	-	17.45	620	1.73	104	2.66	160	30.00	2,295	74.13	3,650
No Plan	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	342.41	10,591	342.41	10,591
TOTAL	41.72	862	0.00	-	43.45	1,568	5.17	332	4.33	360	372.39	12,886	467.07	16,008
% of Total	9%	5%	0%	0%	9%	10%	1%	2%	1%	2%	80%	80%	100%	100%
Density (u/ha)	20.7		0.0		36.08		64.2		83.1		34.6		34.3	

LEITRIM

HOUSING TYPE	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED-USE		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	net units	net ha	units	net ha	units	net ha	units
Registered	8.69	208	0.26	10	5.30	225	0.00	-	0.65	48	0.00	-	14.89	491
Draft Approved	18.58	433	0.00	-	7.66	294	0.00	-	2.92	176	19.29	520	48.45	1,423
Pending	21.52	535	0.00	-	14.18	647	1.28	91	0.70	70	0.00	-	37.68	1,343
No Plan	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	31.99	1,088	31.99	1,088
TOTAL	48.79	1,176	0.26	10	27.14	1,166	1.28	91	4.27	294	51.28	1,608	133.01	4,345
% of Total	37%	27%	0%	0%	20%	27%	1%	2%	3%	7%	39%	37%	100%	100%
Density (u/ha)	24.1		38.5		43.0		71.1		68.9		31.4		32.7	

ORLÉANS

HOUSING TYPE	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED-USE		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	11.97	325	0.10	6	8.86	443	1.89	109	8.82	819	0.00	-	31.64	1,701
Draft Approved	25.63	674	1.93	72	23.15	1,057	16.09	1,162	0.68	147	35.91	981	103.39	4,093
Pending	0.00	-	0.00	-	1.30	52	3.22	228	2.67	269	31.50	644	38.69	1,193
No Plan	0.00	-	0.00	-	0.00	-	0.00	0	0.00	-	315.74	11,149	315.74	11,149
TOTAL	37.60	999	2.03	78	33.31	1,552	21.20	1,499	12.17	1,235	383.15	12,773	489.46	18,136
% of Total	8%	6%	0%	0%	7%	9%	4%	8%	2%	7%	78%	70%	100%	100%
Density (u/ha)	26.6		38.4		46.6		70.7		101.48		33.3		37.1	

TOTAL URBAN AREA

HOUSING TYPE	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED-USE		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	94.26	2,168	4.59	154	48.84	2,443	10.95	709	25.97	2,814	15.66	659	200.27	8,947
Draft Approved	154.82	3,453	5.73	234	97.78	4,258	27.43	1,966	11.27	1,038	129.22	3,473	426.25	14,422
Pending	96.11	2,218	6.93	308	55.67	2,411	13.61	1,105	13.68	1,210	100.00	4,288	285.99	11,540
No Plan	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	1,268.73	51,994	1,268.73	51,994
TOTAL	345.19	7,839	17.25	696	202.28	9,112	51.99	3,780	50.92	5,062	1,513.61	60,414	2,181.24	86,903
% of Total	16%	9%	1%	1%	9%	10%	2%	4%	2%	6%	69%	70%	100%	100%
Density (u/ha)	22.7		40.4		45.0		72.7		99.4		39.9		39.8	