GREENFIELD RESIDENTIAL LAND SURVEY

Mid-2024 UPDATE

City of Ottawa
Planning, Development and Building Services

August 2025

Greenfield Residential Land Survey

Mid-2024 Update

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Planning, Development
and Building Services
Department

Research and Forecasting

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The residential growth management strategy (RGMS) for the Official Plan (OP) has a planning period from July 2018 to June 2046. The RGMS divides the urban area into two categories: a "built-up area" and a "greenfield area". This Greenfield Residential Land Survey (GRLS) report replaces the former Vacant Urban Residential Land Survey (VURLS) and monitors the residential land supply within the greenfield portion of the urban area as of July 1, 2018.

In addition to monitoring only greenfield lands, the reporting period for this report is mid-year to mid-year from July 1, 2023, to June 30, 2024, and provides a land supply update as of July 1, 2024.

As of July 1, 2024, the amount of designated and available urban greenfield land at the edge of the urban built-up area was approximately 1,582 net hectares (ha) with the potential to accommodate approximately 69,736 dwelling units. An additional 366 net ha of lands within a Future Neighbourhood overlay pending the commencement of their secondary planning process will add to this supply going forwards. From 2019 to 2024, greenfield land demand was projected to be approximately 616.2 net ha; actual consumption was 490.3 net ha or less than 80 per cent of the projected amount.

<ins>Provincial Planning Statement (PPS) Land Requirement</ins>

The 2024 PPS requires a 15-year minimum residential land supply. Based on projected greenfield demand, the estimated required 15-year greenfield residential supply is approximately 1,268 net ha. As of July 1, 2024, the total greenfield land supply was 1,582 ha, exceeding the 15-year estimated demand on greenfield lands.

1. Introduction

Since 1982, the City of Ottawa has undertaken the Vacant Urban Residential Land Survey (VURLS) which monitored the supply and consumption of vacant urban residential land in Ottawa's suburban areas to assess whether there is sufficient vacant residential land supply to support the growth projections of the Official Plan and the policy directions of the Provincial Planning Statement.

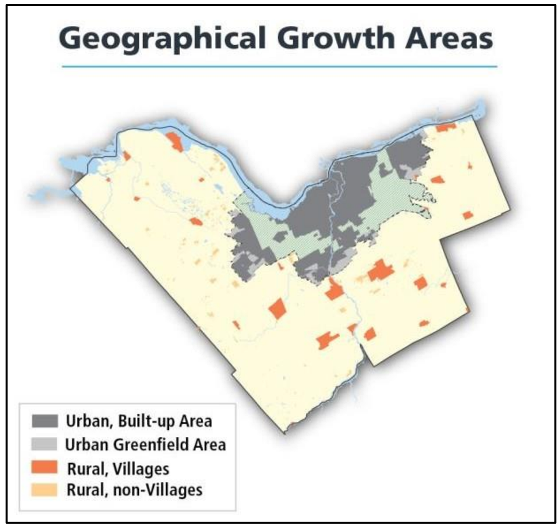
A residential growth management strategy (RGMS) for the Official Plan was adopted in May 2020. The RGMS divides the urban area into two categories: a "built-up area" and "greenfield area". The RGMS establishes growth targets for these two areas: an intensification target of 40 per cent in 2018, increasing to 60 per cent by 2046 for the built-up area, with remaining urban growth occurring in the greenfield area. From 2018 to 2046, these targets result in 51 per cent of urban growth within the built-up area and 49 per cent within the greenfield area. The RGMS establishes the boundaries of the "built-up area" as of July 1, 2018, in the city of Ottawa. This built-up area includes areas inside the Greenbelt as well as intensification parcels within previous Vacant Urban Residential Land Survey reports as they are located within previously developed areas. To be consistent with these two categories in the RGMS and new Official Plan, the former Vacant Urban Residential Land Survey report has changed to a Greenfield Residential Land Survey (GRLS) and only monitors lands within the greenfield areas as of July 1, 2018. Intensification, including intensification parcels identified in previous VURLS reports, is monitored through a new program and report in relation to the Official Plan.

This report has a 12-month reporting period from mid-year to mid-year, being July 1, 2023, to June 30, 2024, and estimates the designated greenfield land supply as of July 1, 2024. Monitoring during mid-year rather than calendar year cycles allows for direct comparisons/analysis to the Official Plan projections which are mid-year.

The Greenfield Residential Land Survey evaluates whether there is sufficient designated and available greenfield land to be consistent with the Provincial Planning Statement and Official Plan. Designated and available greenfield lands are the urban greenfield areas that have commenced a secondary planning process. It also monitors the addition of parcels within the Future Neighbourhood overlay of the Official Plan and their status as the next logical greenfield lands that will become designated and available through the commencement of their secondary planning process.

Appendix 1 contains summary tables of designated greenfield starts, land consumption, and supply that can be found in the parcel list and associated maps.

2. Methodology



Lands surveyed are those identified as the Urban Greenfield Area on Figure 6 in the new Official Plan, which are also shown in the Geographical Growth Areas map. Parcels of greenfield residential land[1] greater than 0.8 net hectares (ha) in size are considered to have development potential for the purposes of this survey. Smaller parcels are included if they are remnants of parcels included in previous Vacant Urban Residential Land Surveys. Redevelopment projects or new development projects on vacant or underutilized lots within the built-up area are not inventoried in this survey and will instead be tracked in an upcoming report on residential intensification. All of the enumerated greenfield parcels are categorized based on their ownership, location, size, unit potential, and planning status. Field surveys, aerial photos, municipal records, planning documents, assessment data, and land registry records are all used to compile the inventory of parcels and their characteristics.

Parcels from the previous GRLS report are the starting point for estimating the current year supply. Housing starts data supplied from the Canada Mortgage and Housing Corporation (CMHC) represent residential housing units that started construction during the reporting period and the associated parcels are removed from the existing supply. Remaining parcels are analyzed for any revisions based on more detailed information received in the current year, such as a new planning application. Final unit and land area supply for the study year is a result of removing CMHC housing starts and revisions to remaining parcels from the previous year's inventory. For the mid-2024 survey, starts from July 1, 2023, to June 30, 2024, were removed from the July 1, 2023, supply and the housing potential on remaining parcels was revised based on new information as of June 30, 2024.

This report includes an appendix with greenfield parcel summary data and a separate parcel list and associated maps to provide further details regarding each parcel.

Housing unit types in this report are defined as follows:

- Single-detached: A single dwelling unit not attached to any other building;
- 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 attached by common or adjoining walls 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.

[1] Designated greenfield residential land in this survey includes lands approved for residential development based on the most detailed, approved planning document for the subject parcel at time of publication. 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, Secondary Plans, Community Design Plans, and the Ottawa Official Plan.

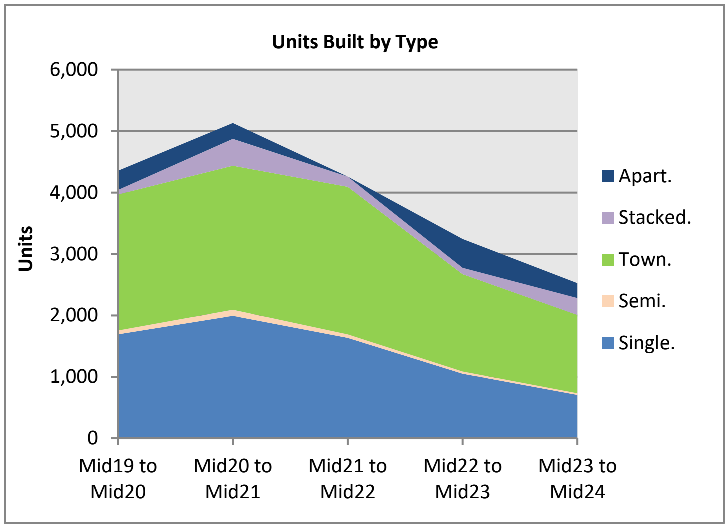
3. Consumption

Housing Starts

From mid-2023 to mid-2024, there were 2,527 housing starts on greenfield parcels, the lowest amount in 5 years and 35.2 per cent below the five-year average of 3,902 starts annually. South Nepean saw the most development with 31.5 per cent of all starts, followed closely by Kanata-Stittsville at 31.2 per cent, then Orléans at 19.1 per cent. Kanata-Stittsville experienced the greatest year-over-year increase, while Orléans, South Nepean, Leitrim, and Riverside South all experienced a decrease year-over-year in housing starts.

Overall, townhouse units (1,274) continued to have the highest share of greenfield starts by type, at 50.4 per cent. With the overall decline in greenfield housing starts, all unit types saw a decrease compared to the previous year, except for stacked townhouses. Stacked townhouse units increased to 276 units compared to 104 units a year prior, while all other unit types experienced an over 20 per cent decrease from the previous year.

Greenfield Starts, July 2023 to June 2024	
Unit Type	Housing Starts
Single-detached	705
Semi-detached	28
Townhouse	1,274
Stacked Townhouse	276
Apartments	244
Total	2,527



Over the past five-years, single-detached dwellings accounted for 36.3 per cent of greenfield housing starts. From mid-2023 to mid-2024, single-detached dwellings accounted for 27.9 per cent.

Greenfield Single-detached Shares		
Time period	Singles	Multiples
Mid-2019 to Mid-2020	39%	61%
Mid-2020 to Mid-2021	39%	61%
Mid-2021 to Mid-2022	38%	62%
Mid-2022 to Mid-2023	32%	68%
Mid-2023 to Mid-2024	28%	72%
5-year avg	36%	61%

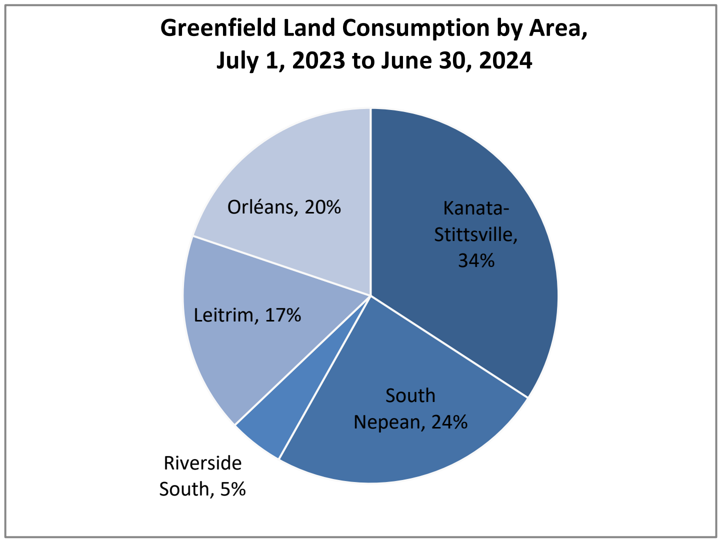
Further details on greenfield starts by dwelling type over the past 5-years are provided for in Table 1, Appendix 1.

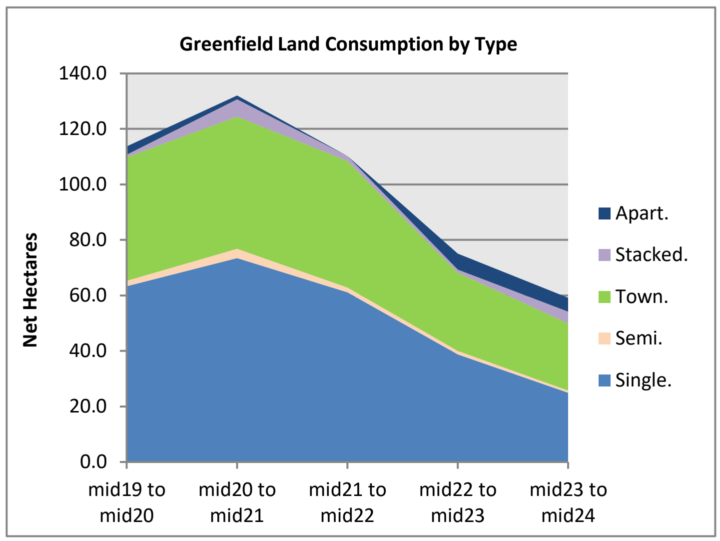
Land Consumption

The 2,527 greenfield housing starts from mid-2023 to mid-2024 occurred on 59.2 ha, the lowest amount within 5 years. Kanata-Stittsville saw the most land consumption at 34.2 per cent of all lands developed, followed by South Nepean at 24.0 per cent. Kanata-Stittsville experienced the greatest year-over-year increase, while all other areas experienced a decrease.

Land consumed by all unit types, except stacked townhouses, decreased from the previous year. Despite experiencing the largest decrease in land development since the last reporting period, single detached units continued to consume more land than any other unit type with 25.0 ha in mid-2024. Townhouse construction consumed 24.2 ha of land, apartments consumed 5.0 ha, stacked townhouses consumed 4.2 ha, and semi-detached units consumed 0.8 ha.

From 2019 to 2024, greenfield land demand was projected to be approximately 616.2 net ha; actual consumption was 490.3 net ha. Further details on greenfield land consumption by dwelling type over the past 5-years are provided for in Table 2, Appendix 1. Tables 3a and 3b in Appendix 1 outline the greenfield housing starts and their land consumption by suburban community over the past 5-years.





4. Residential Greenfield Supply

The residential greenfield land supply is separated into two different categories: Designated and Available Greenfield supply and Future Neighbourhoods. The Designated and Available Greenfield supply consists of greenfield parcels that were within the urban area prior to the adoption of the New Official Plan and started the secondary planning process by June 30, 2024. Future Neighbourhoods consist of parcels that were added to the urban area by Ottawa city Council during the New Official Plan process in 2021 have not yet started the secondary planning process as of June 30, 2024.

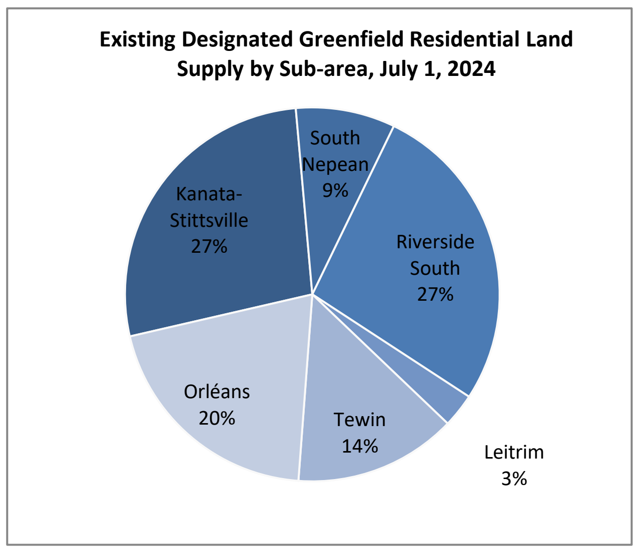
Designated and Available Greenfield Supply, July 1, 2024

After the 2,527 housing starts in mid-2023 to mid-2024 were removed from the greenfield inventory, parcels were analyzed and further revised based on the most recent planning information as of June 30, 2024. Future Neighbourhood parcels that commenced the secondary planning process as of June 30, 2024, were included within the designated and available supply. Based on these updates, as of July 1, 2024, there was approximately 1,581.8 net ha of designated and available greenfield land in Ottawa.

Kanata-Stittsville has the most supply with 431.4 ha (27.3 per cent), followed by Riverside South at 428.8 ha (27.1 per cent), Orléans at 316.6 ha (20.0 per cent), Tewin at 222.7 ha (14.1 per cent), South Nepean at 136.1 ha (8.6 per cent), and Leitrim with 46.3 ha (2.9 per cent).

Designated Greenfield Residential Supply by Area, July 1, 2024

Sub-area	Land Supply (net ha)	Unit Potential
Kanata-Stittsville	431.4	19,447
Riverside South	428.8	17,511
Orléans	316.6	13,948
Tewin	222.7	8,016
South Nepean	136.1	9,168
Leitrim	46.3	1,646
Total	**1,581.8**	**69,736**

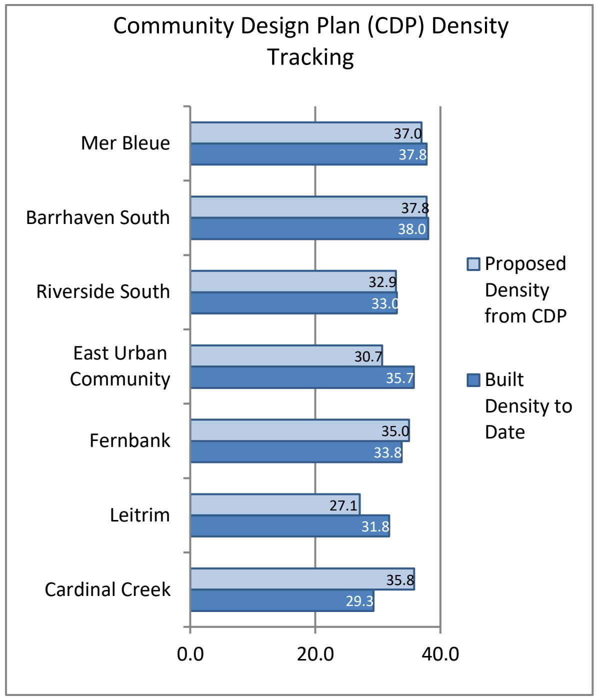


Determining the dwelling unit potential from the land supply is based on applications submitted through the development review process, calculations based on proposed dwelling counts from secondary plans or community design plans, and where neither is available, average development density by applicable sub-area from the past five years is applied. These assumptions are further detailed in Appendix 1 as follows:

- Table 4 outlines the built densities by dwelling type from mid-2019 to mid-2024
- Tables 5a through 5e outlines the built densities by dwelling type in each suburban area from mid-2019 to mid-2024
- Table 6 summarizes the densities for all units built by suburban area from mid-2019 to mid-2024, and the weighted average densities from the most recent five-years.

- Table 7 in Appendix 1 outlines the greenfield supply by development status in each suburban community.

Community Design Plan Tracking



Community Design Plans (CDP) establish density targets within some of the secondary plan areas and comparing construction to date within these areas monitors development trends since their approval. Out of the seven CDPs being tracked, Barrhaven South had the highest development density at 38.0 units per net hectare. Although Fernbank and Cardinal Creek had lower development densities compared to their CDP targets, the densities-to-date only provide a snapshot in time and will fluctuate as development progresses within the CDPs. Typically, lower density housing types such as single-detached homes are built prior to higher density unit types such as stacked townhomes and apartments, resulting in a lower built density in the newer CDPs. In most CDPs, construction density is tracking closely to the planned densities.

Additional Supply, Post-2024

Future Neighbourhoods (FN) are parcels that were added to the urban area by Ottawa City Council during the New Official Plan process in 2021. Council adopted an additional 1,281 gross hectares of greenfield land. Unless specified within a concept plan or development application, assumed net residential portion of that land is 50 per cent, providing 662.4 net hectares of residential land. Applying the minimum 36 units per net hectare as per Official Plan policy 5.4.4.2 yields approximately 24,745 future new dwellings.

Future Neighbourhood parcels become designated and available for residential development when their secondary planning process begins. As of July 1, 2024, 592.0 gross hectares within Future Neighbourhood parcels started the more detailed secondary planning process. Of this land, about half or 296.0 net hectares is designated and available for residential development, with a unit potential of 10,656 dwellings based on a minimum density of 36 units per hectare.

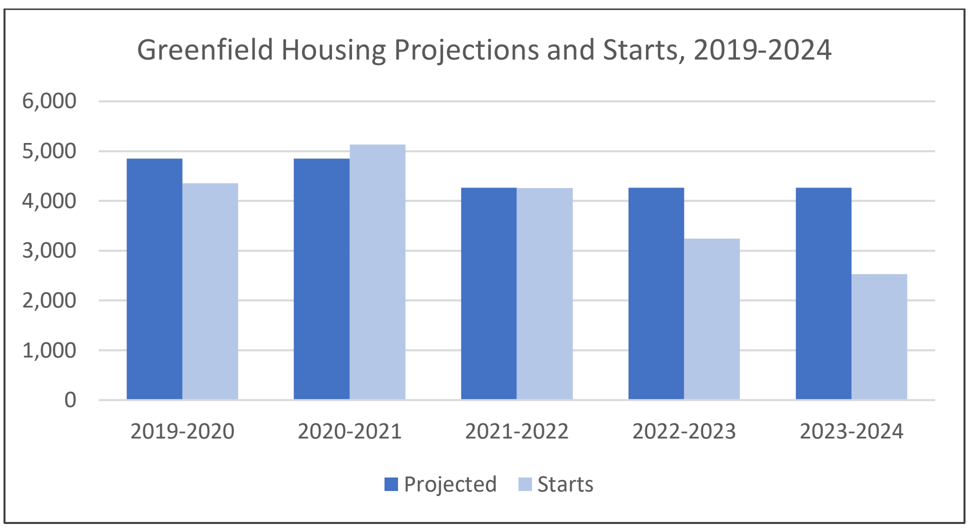
An additional 338.6 net hectares of Future Neighbourhood parcels initiated the secondary planning process between July 1, 2024, and June 30, 2025, and another 27.8 net hectares still have not started their secondary planning process. Together, they could accommodate another 14,089 dwellings. An additional 366.4 net hectares will become designated and available after July 1, 2024, when these lands begin their secondary planning process. Of these lands, over 90 per cent (338.6 net hectares) commenced their secondary planning process between July 1, 2024, and June 30, 2025, and will add approximately 13,000 additional dwellings to the designated and available supply in the 2025 survey. Finally, an additional 28 net hectares of Future Neighbourhood parcels that have not commenced their secondary planning process as of June 30, 2025, and have the potential to add at least 1,000 dwellings to a future survey.

Designated and Available Greenfield Supply		
Area	**Land Supply (net ha)**	**Unit Potential**
Designated and Available Greenfield Supply, July 1, 2024	1,581.8	69,736
Future Neighbourhood Supply, July 1, 2024, to June 30, 2025	338.6	13,087
Future Neighbourhood Supply, post-2025	27.8	1,002
Potential Residential Greenfield Supply	**1,948.3**	**83,825**

5. Projected Residential Greenfield Demand

The *Provincial Planning Statement, 2024* (PPS) requires a minimum of 15-year supply of residential land to be maintained at all times. The Official Plan projections are approved, in-force, and are to be used for related planning decisions, including assessing consistency with the Provincial Planning Statement.

Over the past 5 years from 2019 to 2024, over 22,500 dwellings, averaging 4,501 annually, were projected in the Official Plan to occur on 616 hectares of greenfield lands. Over that same period 19,510 housing starts, averaging 3,902 annually, occurred on 490 hectares of greenfield lands. During this period, there were 2,994 fewer housing starts and 126 fewer hectares of greenfield development than were projected.



Over the next 15 years from 2024 to 2039, 47,859 dwellings are projected on greenfield lands with an average of 3,191 annually. The average density over the past five years (as calculated in Table 4, Appendix 1) is applied to estimate the greenfield land requirement. The density over the past five years is averaged to smooth annual fluctuations to derive estimated land consumption. This calculation projects a need of 1,267.8 hectares for greenfield development over the next 15 years, or 84.5 hectares per year.

15-year Residential Land Need, 2024 to 2039					
Dwelling Type	**Annual Greenfield Projected Need**	**5-Year Avg. Density**	**Land (net ha)**	**Years**	**15-year land need**
Single-detached	1,358	27.0	50.2		
Semi-detached	70	31.4	2.2		
Townhouses	1,455	51.6	28.2		
Stacked Towns/Apartments	308	79.6	3.9		
All Dwellings Projection	**3,191**		**84.5**	**15**	**1,267.8**

Note: Stacked townhouse/Apartment density is the combined housing starts and land consumption of these unit types over the past five-years from Tables 1 and 2 in the Appendix

6. Provincial Planning Statement

The PPS contains policies for residential land to ensure that supply is sufficient:

Policy 2.1.4

a) Maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands which are *designated and available* for residential development.

15-Year Supply Requirement (PPS) for Designated and Available Greenfield Lands, July 1, 2024	
	Net Hectares
Mid 2024 Greenfield Supply	1,581.8
15-year Demand	1,267.8
Surplus (+)/Deficit (-)	**+314.0**

On July 1, 2024, the designated and available greenfield land supply was approximately 1,581.8 net hectares. Based on a projected greenfield demand of 84.5 net hectares per year, over the next 15-years greenfield demand is estimated to require approximately 1,267.8 net hectares, leaving a surplus of 314.0 net hectares.

15-Year Supply Requirement (PPS) with Designated and Available Future Neighbourhoods, July 1, 2025	
	Net Hectares
Mid 2024 Greenfield Supply	1,581.8
Mid 2024-2025 FN Supply	338.6
Total Designated and Available Supply	1,920.4
15-year Demand	1,267.8
Surplus (+)/Deficit (-)	**+652.6**

In addition, as of July 1, 2025, there were 338.6 net ha of Future Neighbourhood parcels or 13,087 potential dwellings that are considered designated and available for residential development as defined in the PPS for having commenced their secondary planning process. These parcels represent the next phase of designated greenfield supply after developing the existing designated supply. If added to the mid-2024 Designated and Available Greenfield lands, supply increases to 1,920.4 net hectares. A further 27.8 net ha of Future Neighbourhood parcels, that have not yet started the planning process, are also in the pipeline for residential development for a total of approximately 1,948.3 net hectares of greenfield residential land supply or 83,825 potential dwellings.

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, including units in draft approved or registered plans.

3-Year Supply Requirement (PPS) for Registered and Draft Approved Greenfield Lands with Servicing Capacity	
	Net Hectares
Land Supply	619.6
Annual Demand, 2022-2025	84.5
3-year demand	253.5

The registered (277.2 net ha) and draft approved (342.4 net ha) land supply, as shown in Table 7, Appendix 1, together provides for 619.6 net hectares of serviced land, similarly exceeding the PPS requirement, and is sufficient for over seven years.

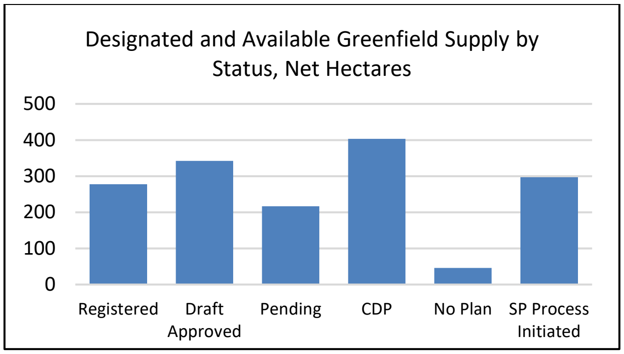
7. Designated and Available Greenfield Supply by Status and Future Neighbourhoods

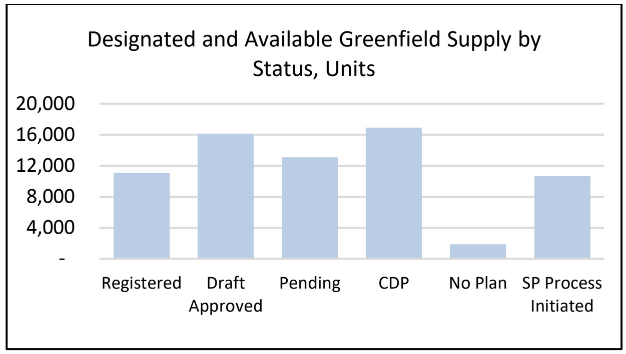
Designated and Available Greenfield Supply by Development Status

Development status refers to where the parcel is in the development review process. Registered plans are legally registered lots where building permits and housing starts may begin. Draft Approved refers to an approved draft plan of subdivision and is the precursor to plan registration to legally establish lots. Pending refers to an existing Planning Act application prior to approval, such as a zoning by-law amendment and draft plan of subdivision. CDP refers to a Community Design Plan or Secondary Plan that provides higher-level master planning direction, such as land use and density. No Plan refers to a parcel that is not within a CDP nor does it have any Planning Act approvals or applications. Lastly, SP Process Initiated refers to a Future Neighbourhood parcel that has officially commenced the secondary planning process.

There are approximately 7.3 years of serviced land that is registered and draft approved ready for development, over 2 years of lands currently pending through active applications, over 4 years of master planned lands ready for applications, about 5-months of land without any planning status, and 3.5 years of future neighbourhood parcels that have commenced the secondary planning process. Altogether, there is over 18 years of projected designated and available greenfield supply.

Designated and Available Greenfield Residential Supply by Status, July 1, 2024				
Development Status	**Land Supply (net ha)**	**Unit Potential**	**Projected Years of Supply**	**Supply Until Year**
Registered	277.2	11,056	3.3	2027
Draft Approved	342.4	16,131	4.1	2028
Pending	216.7	13,089	2.6	2027
CDP	403.3	16,932	4.8	2029
No Plan	46.2	1,872	0.5	2025
SP Process Initiated	296.0	10,656	3.5	2028
Total	**1,581.2**	**69,736**	**18.7**	**2043**





<u>Supply with Future Neighbourhoods</u>

The remaining Future Neighbourhood parcels will supplement the Existing Designated Greenfield land supply to approximately 2050. The Designated and Available Greenfield supply as of mid-2024 and Future Neighbourhood parcels provide a projected land supply of 26 years with a total unit potential of 83,825 dwellings. Of this, 1,920.4 net ha are designated and available for residential development at the time of this report, providing a unit potential of 82,823 or approximately 25 years of supply.

Land Supply, Existing Designated Greenfield and Future Neighbourhood Parcels					
	Land Supply (net ha)	**Unit Potential**	**Annual Land Demand (net ha)**	**Projected Years of Supply**	**Supply Until Year**
Designated and Available Greenfield Supply, mid-2024	1,581.8	69,736	84.5	18.7	2043
FN commenced and updated, mid-2025	338.6	13,087	54.7	6.2	2049
Remaining FN parcels	27.8	1,002	26.4	1.1	2050
Total	**1,948.3**	**83,825**		**26.0**	**2050**

8. Conclusion

Overall, the total supply of greenfield land for new housing in Ottawa as of July 1, 2024, exceeds Official Plan growth projections and is consistent with the policies of the *Provincial Planning Statement, 2024* for greenfield residential land. Ottawa's Designated and Available Greenfield residential land supply of 1,581.8 net ha has an estimated potential for approximately 69,736 dwellings. Based on a projected annual consumption of 84.5 net ha or 1,267.8 net ha over 15-years, the total supply of designated and available greenfield land for residential development is consistent with the *Provincial Planning Statement, 2024* requirement.

As of July 1, 2025, an additional 338.6 net ha of Future Neighbourhood parcels, or 13,087 potential dwellings, became designated and available for residential development. This added residential land supply is more than sufficient to meet any potential increases in greenfield demand until the next Official Plan update that will commence late 2025, particularly when greenfield housing consumption over the past 5 years has been lower than estimated using current Official Plan projections.

Glossary

Built-up Area: Land that is developed within Ottawa's urban boundary as of July 1, 2018.

Designated and Available: According to the PPS, designated and available means lands designated in the official plan for urban residential use. For municipalities where more detailed official plan policies (e.g., secondary plans) are required before development applications can be considered for approval, only lands that have commenced the more detailed planning process are considered to be designated and available for the purposes of this definition.

Designated and Available Greenfield Supply: The Designated Greenfield supply consists of greenfield parcels that were designated greenfield as of July 1, 2018, and Future Neighbourhood parcels that have commenced their secondary planning process. This does not include new development projects on vacant or underutilized lots within the urban boundary following July 1, 2018.

Future Neighbourhood: Future Neighbourhoods consist of parcels that were added to the urban boundary by Ottawa City Council during the New Official Plan process in 2021.

Greenfield Area: Land that is undeveloped within Ottawa's urban boundary as of July 1, 2018, as well as land added by expanding the City's urban boundary.

Intensification: According to the PPS, means the development of a property, site or area at a higher density than currently exists through:

a) redevelopment, including the reuse of brownfield sites and underutilized shopping malls and plazas;
b) the development of vacant and/or underutilized lots within previously developed areas;
c) infill development; and
d) the expansion or conversion of existing buildings.

Appendix 1: Greenfield Data Tables

Table 1: Housing Starts on Greenfield Residential Land, mid2019-mid2024

Unit Type	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-year Avg
Single-detached	1,693	1,992	1,633	1,053	705	1,415
Semi-detached	62	98	58	36	28	56
Townhouse	2,210	2,345	2,399	1,581	1,274	1,962
Stacked Townhouse	74	436	168	104	276	212
Apartment	314	260	0	467	244	257
Total	**4,353**	**5,131**	**4,258**	**3,241**	**2,527**	**3,902**

Table 2: Greenfield Land Consumption of Housing Starts, mid2019-mid2024 (net residential hectares)

Unit Type	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-year Avg
Single-detached	63.3	73.5	61.1	38.8	25.0	52.3
Semi-detached	2.0	3.3	1.7	1.2	0.8	1.8
Townhouse	44.5	47.7	45.6	28.2	24.2	38.0
Stacked Townhouse	0.9	6.2	1.8	1.1	4.2	2.8
Apartment	3.1	1.4	0.0	5.7	5.0	3.0
Total	**113.7**	**132.1**	**110.3**	**75.1**	**59.2**	**98.1**

Table 3a: Housing Starts on Greenfield Land by Area, mid2019-mid2024

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-year Avg
Kanata-Stittsville	1,657	1,271	1,407	515	788	1,128
% of Total	*38.1%*	*24.8%*	*33.0%*	*15.9%*	*31.2%*	*28.9%*
South Nepean	822	1,108	1,308	1,065	796	1,020
% of Total	*18.9%*	*21.6%*	*30.7%*	*32.9%*	*31.5%*	*26.1%*
Riverside South	455	639	503	249	100	389
% of Total	*10.5%*	*12.5%*	*11.8%*	*7.7%*	*4.0%*	*10.0%*
Leitrim	615	823	556	374	361	546
% of Total	*14.1%*	*16.0%*	*13.1%*	*11.5%*	*14.3%*	*14.0%*
Orléans	804	1,290	484	1,038	482	820
% of Total	*18.5%*	*25.1%*	*11.4%*	*32.0%*	*19.1%*	*21.0%*
Total	**4,353**	**5,131**	**4,258**	**3,241**	**2,527**	**3,902**

Table 3b: Greenfield Land Consumption of Housing Starts by Area, mid2019-mid2024 (net residential hectares)

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-year Avg
Kanata-Stittsville	41.6	33.2	37.0	12.3	20.2	28.8
% of Total	*36.5%*	*25.1%*	*33.5%*	*16.4%*	*34.2%*	*29.4%*
South Nepean	19.7	27.2	27.0	24.2	14.2	22.5
% of Total	*17.3%*	*20.6%*	*24.4%*	*32.2%*	*24.0%*	*22.9%*
Riverside South	13.7	18.3	14.9	7.1	2.8	11.3
% of Total	*12.0%*	*13.8%*	*13.6%*	*9.5%*	*4.7%*	*11.6%*
Leitrim	17.9	23.8	17.1	10.6	10.2	15.9
% of Total	*15.8%*	*18.0%*	*15.6%*	*14.2%*	*17.3%*	*16.3%*
Orléans	20.8	29.6	14.2	20.8	11.7	19.4
% of Total	*18.3%*	*22.4%*	*13.0%*	*27.8%*	*19.8%*	*19.8%*
Total	**113.7**	**132.1**	**110.3**	**75.1**	**59.2**	**98.1**

Table 4: Built Densities on Greenfield Parcels, mid2019-mid2024 (units per net residential hectare)

Unit Type	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-Year Weighted Average*
Single-detached	26.7	27.1	26.7	27.1	28.2	27.0
Semi-detached	31.7	29.6	33.5	29.1	37.3	31.4
Townhouse	49.7	49.2	52.6	56.1	52.6	51.6
Stacked Townhouse	79.5	70.7	92.4	94.8	65.6	74.4
Apartment	102.9	182.3	-	81.4	48.8	84.5
Weighted Average	**38.3**	**38.9**	**38.6**	**43.2**	**42.7**	**39.8**

*Weighting involved dividing the sum of units built by the sum of hectares developed

Table 5a: Greenfield Single-Detached Development Densities, mid2019-mid2024 (units per net residential hectare)

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-Year Weighted Average
Kanata-Stittsville	25.3	24.9	26.9	23.9	27.0	25.7
South Nepean	30.3	31.2	30.7	31.2	34.2	31.2
Riverside South	23.9	25.1	24.7	25.7	24.6	24.7
Leitrim	25.3	25.6	24.3	22.6	21.4	24.4
Orléans	28.6	27.7	26.4	27.6	28.2	27.7
Weighted Average	**26.7**	**27.1**	**26.7**	**27.1**	**28.2**	**27.0**

Table 5b: Greenfield Semi-Detached Development Densities, mid2019-mid2024 (units per net residential hectare)

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-Year Weighted Average
Kanata-Stittsville	31.0	32.4	36.1	28.6	38.8	33.2
South Nepean	24.0	25.3	44.4	0.0	36.8	27.9
Riverside South	-	34.6	-	33.3	36.4	34.7
Leitrim	44.4	28.5	38.7	32.4	-	32.9
Orléans	36.6	27.6	29.6	28.2	27.4	29.4
Weighted Average	**31.7**	**29.6**	**33.5**	**29.1**	**37.3**	**31.4**

Table 5c: Greenfield Townhouse Development Densities, mid2019-mid2024 (units per net residential hectare)

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-Year Weighted Average
Kanata-Stittsville	49.6	49.8	51.4	63.1	51.4	51.7
South Nepean	63.6	56.3	58.3	57.9	64.5	59.2
Riverside South	42.2	41.6	54.6	48.1	45.0	45.4
Leitrim	45.2	45.4	45.5	50.8	44.5	45.9
Orléans	49.4	52.7	47.8	53.7	49.9	51.0
Weighted Average	**49.7**	**49.2**	**52.6**	**56.1**	**52.6**	**51.6**

Table 5d: Greenfield Stacked Townhouse Development Densities, mid2019-mid2024 (units per net residential hectare)

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-Year Weighted Average
Kanata-Stittsville	69.0	70.3	93.3	0.0	65.1	70.7
South Nepean	-	76.6	92.3	83.1	83.0	84.5
Riverside South	-	64.0	-	-	-	64.0
Leitrim	-	-	-	-	-	-
Orléans	83.6	72.6	-	139.1	36.8	65.5
Weighted Average	**79.5**	**70.7**	**92.4**	**94.8**	**65.6**	**74.4**

Table 5e: Greenfield Apartment Development Densities, mid2019-mid2024 (units per net residential hectare)

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-Year Weighted Average
Kanata-Stittsville	113.9	101.5	-	-	-	110.7
South Nepean	80.0	-	-	-	160.0	112.0
Riverside South	81.0	-	-	-	-	81.0
Leitrim	-	-	-	136.4	39.1	45.6
Orléans	-	262.4	-	78.1	-	99.6
Weighted Average	**102.9**	**182.3**	**0.0**	**81.4**	**48.8**	**84.5**

Table 6: Greenfield Development Densities (all unit types), mid2018-mid2024 (units per net residential hectare)

Area	mid2019-mid2020	mid2020-mid2021	mid2021-mid2022	mid2022-mid2023	mid2023-mid2024	5-Year Weighted Average
Kanata-Stittsville	39.9	38.3	38.1	41.7	39.0	39.1
South Nepean	41.7	40.7	48.4	44.1	56.1	45.4
Riverside South	33.3	35.0	33.7	35.1	35.6	34.3
Leitrim	34.3	34.6	32.5	35.2	35.3	34.2
Orléans	38.6	43.6	34.0	49.8	41.1	42.1
Weighted Average	**38.3**	**38.9**	**38.6**	**43.2**	**42.7**	**39.8**

Table 7: Greenfield Residential Land Supply and Unit Potential by Development Status and Area, Mid 2024

	Development Status													
	Registered		Draft Approved		Pending		CDP		No Plan		SP Process Initiated		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***	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***
Kanata-Stittsville	124.99	4,495	162.50	7,250	66.47	4,782	20.10	740	38.20	1,493	19.09	687	431.4	19,447
South Nepean	18.21	1,047	21.41	2,032	22.82	2,455	17.80	1,575	1.58	106	54.25	1,953	136.1	9,168
Riverside South	76.12	2,664	89.29	3,652	18.94	651	244.48	10,544	0.00	0	0.00	0	428.8	17,511
Leitrim	25.77	790	13.86	431	0.00	0	6.69	425	0.00	0	0.00	0	46.3	1,646
Orléans	32.14	2,060	55.29	2,766	108.46	5,201	114.23	3,648	6.46	272	0.00	0	316.6	13,948
Tewin	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	222.68	8,016	222.7	8,016
Total	**277.24**	**11,056**	**342.35**	**16,131**	**216.69**	**13,089**	**403.30**	**16,932**	**46.24**	**1,872**	**296.01**	**10,656**	**1,581.8**	**69,736**

Table 8a: Share of Total Vacant Urban Land of 10 Largest Landowners, Year-End 2015-2019

	Net Hectares Owned					% of all Vacant Urban Land				
Owner Name	**2015**	**2016**	**2017**	**2018**	**2019**	**2015**	**2016**	**2017**	**2018**	**2019**
Riverside South Dev. Corp.	382.7	427.8	334.6	304.0	292.9	18.5	20.2	16.4	16.3	16.3
Richcraft Homes	170.5	149.1	141.7	161.8	165.4	8.2	7.0	7.0	8.7	9.2
Claridge Homes	159.2	158.1	138.3	148.3	135.3	7.7	7.5	6.8	7.9	7.5
Minto Group	174.8	148.7	144.1	123.3	103.2	8.5	7.0	7.1	6.6	5.7
Urbandale Construction	29.5	44.2	132.9	97.7	92.7	1.4	2.1	6.5	5.2	5.2
KNL Developments	103.7	103.7	101.8	94.1	94.1	5.0	4.9	5.5	5.0	5.2
Tamarack Homes	110.3	101.4	88.5	91.6	86.2	5.3	4.8	4.4	4.9	4.8
CRT Developments Inc.	74.0	74.8	74.8	82.3	73.9	3.6	3.5	3.7	4.4	4.1
Tartan Homes	79.9	93.8	69.5	59.9	64.7	3.9	4.4	3.4	3.2	3.6
Mattamy Homes	137.7	112.1	81.4	62.8	53.5	6.7	5.3	4.0	3.4	3.0
Total, Top 10 Owners	**1,467.1**	**1,439.3**	**1,307.7**	**1,225.7**	**1,161.9**	**70.9**	**67.9**	**64.3**	**65.5**	**64.6**
Total Vacant Land	**2,068.4**	**2,121.1**	**2,034.4**	**1,870.2**	**1,798.8**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Table 8b: Share of Greenfield Residential Land of 10 Largest Landowners, Mid Year 2021-2024

	Net Hectares Owned				% of all Vacant Urban Land			
Owner Name	**Mid-2021**	**Mid-2022**	**Mid-2023**	**Mid-2024**	**Mid-2021**	**Mid-2022**	**Mid-2023**	**Mid-2024**
Riverside South Dev. Corp.	315.5	304.9	292.7	318.2	19.9%	20.6%	21.6%	20.1%
Tamarack, AOO, Caivan	N/A	N/A	N/A	222.7	0.0%	0.0%	0.0%	14.1%
Minto Group	80.9	72.8	58.8	141.5	5.1%	4.9%	4.3%	8.9%
Richcraft Homes	129.8	126.3	126.2	141.0	8.2%	8.5%	9.3%	8.9%
Claridge Homes	111.9	105.9	106.6	100.9	7.0%	7.1%	7.8%	6.4%
KNL Developments	92.7	94.1	70.7	88.5	5.8%	6.3%	5.2%	5.6%
Tamarack Homes	76.9	76.3	70.4	60.2	4.8%	5.1%	5.2%	3.8%
Ashcroft	44.3	44.1	40.3	40.1	2.8%	3.0%	3.0%	2.5%
M & A Rentals	38.2	38.2	38.2	38.2	2.4%	2.6%	2.8%	2.4%
CRT Developments	63.5	24.4	31.6	33.6	4.0%	1.6%	2.3%	2.1%
Total, Top 10 Owners	**953.8**	**887.1**	**901.3**	**1,184.8**	**60.1%**	**59.9%**	**66.4%**	**74.9%**
Total Greenfield Land	**1,587.3**	**1,482.1**	**1,358.1**	**1,581.8**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

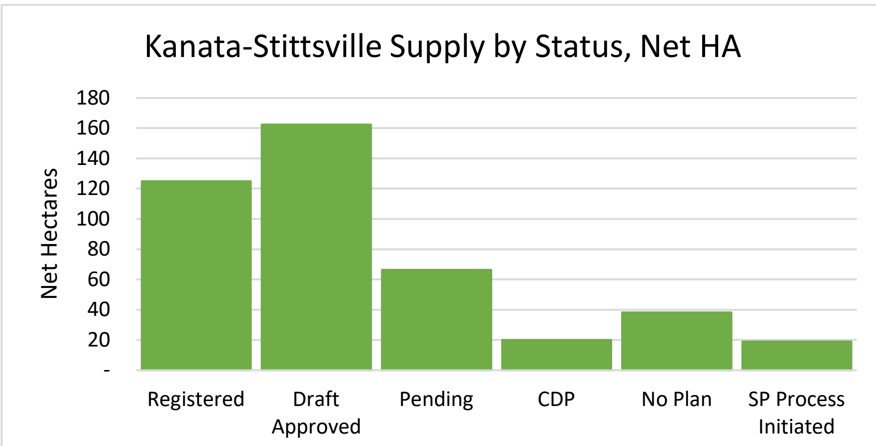
Table 9: Greenfield Residential Land Supply of Major Landowners (10 net ha and larger) by Area, Mid-2024

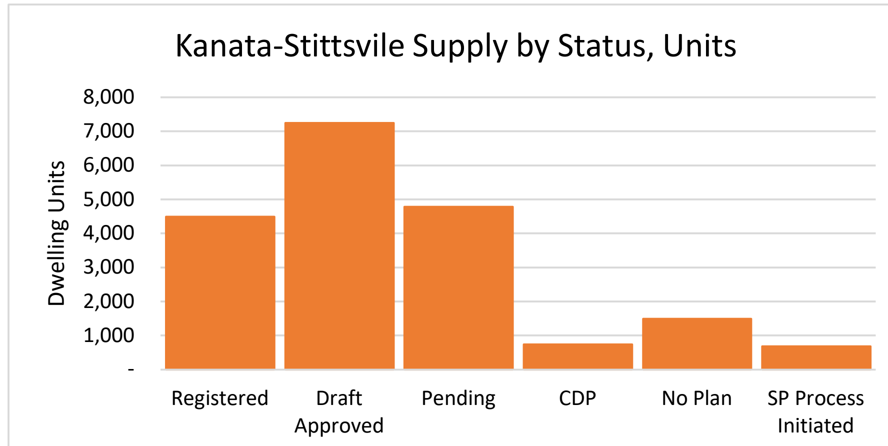
Area	Owner Name	Total (net ha)
Kanata-Stittsville	KNL Development	88.5
	Minto Group	62.8
	Richcraft Homes	44.8
	M & A RENTALS	38.2
	CRT Developments	33.6
	CU Developments Inc	23.8
	1384341 Ontario Ltd.	20.3
	Caivan	19.1
	2087875 Ontario Ltd.	18.1
	Lioness Developments Inc.	15.6
	Claridge	12.0
South Nepean	Minto Group	68.6
	Barrhaven Conservancy	19.1
	South Nepean Development	13.6
Riverside South	Riverside South Development Corp.	318.2
	Claridge Homes	21.9
	Urbandale Construction	21.4
	2356349 Ontario Inc	15.4
	Mion Lugi Estate	14.4
	Hakim, Antoine	10.8
	2167799 Ontario Inc.	10.5
Leitrim	Barrett Co-Tenancy	12.0
Orléans	Richcraft Homes	93.8
	Tamarack Homes	50.4
	Claridge Homes	48.8
	Ashcroft Homes	40.1
	Minto Group	10.2
Tewin	Tamarack, AOO, Caivan	222.7
Total (net ha)		**1,368.5**

Table 10: Greenfield Residential Land Supply, Unit Potential and Approval Status, Mid 2024

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	59.26	1,094	0.16	4	57.71	2,535	4.20	265	3.67	597	-	-	124.99	4,495
Draft Approved	67.18	1,690	4.56	164	59.92	2,804	17.12	968	13.72	1,624	-	-	162.50	7,250
Pending	26.97	726	0.80	36	24.05	1,191	6.99	512	7.67	2,317	-	-	66.47	4,782
CDP	-	-	-	-	-	-	-	-	-	-	20.10	740	20.10	740
No Plan	-	-	-	-	-	-	-	-	-	-	38.20	1,493	38.20	1,493
SP Process Initiated											19.09	687	19.09	687
TOTAL	153.41	3,510	5.52	204	141.67	6,530	28.31	1,745	25.06	4,538	77.39	2,920	431.35	19,447
% of Total	36%	18%	1%	1%	33%	34%	7%	9%	6%	23%	18%	15%	100%	100%
Density (units/hectare)	22.9		37.0		46.1		61.6		181.1		37.7		45.1	





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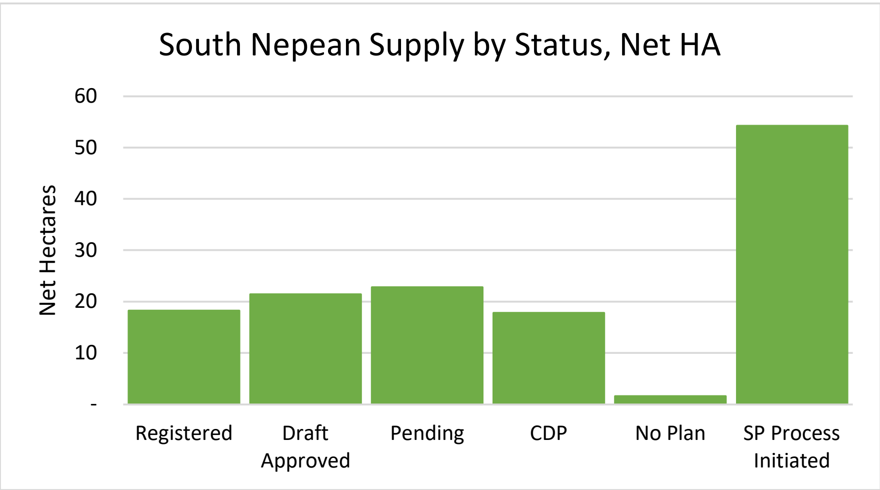
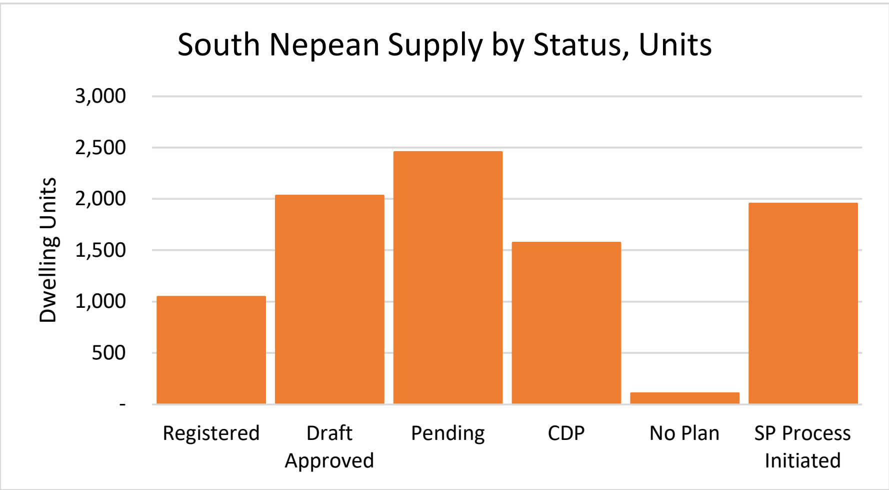
SP Process Initiated = Secondary Planning process has started

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	10.86	292	-	-	4.40	216	1.30	96	1.65	443	-	-	18.21	1,047
Draft Approved	1.00	33	-	-	16.08	1,111	4.33	888	-	-	-	-	21.41	2,032
Pending	4.82	139	-	-	12.96	933	2.49	258	2.54	1,125	-	-	22.82	2,455
CDP	-	-	-	-	-	-	-	-	-	-	17.80	1,575	17.80	1,575
No Plan	-	-	-	-	-	-	-	-	0.71	67	0.87	39	1.58	106
SP Process Initiated	-	-	-	-	-	-	-	-	-	-	54.25	1,953	54.25	1,953
TOTAL	16.69	464	-	-	33.44	2,260	8.12	1,242	4.90	1,635	72.91	3,567	136.06	9,168
% of Total	12%	5%	0%	0%	25%	25%	6%	14%	4%	18%	54%	39%	100%	100%
Density (units/hectare)	27.8		0.0		67.6		153.0		333.4		48.9		67.4	





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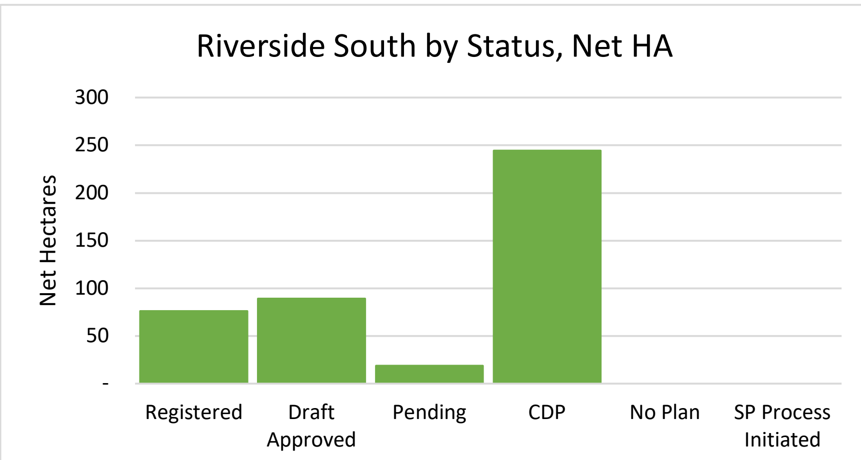
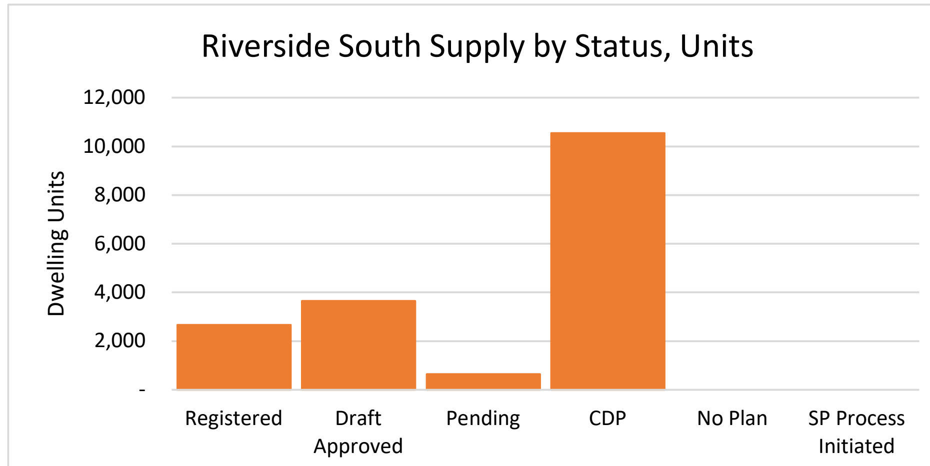
RIVERSIDE SOUTH

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	33.01	835	1.15	30	38.04	1,521	1.84	118	2.09	160	-	-	76.12	2,664
Draft Approved	25.15	503	-	-	39.20	1,455	21.82	1,320	3.12	374	-	-	89.29	3,652
Pending	7.64	146	0.11	2	9.16	391	-	-	2.03	112	-	-	18.94	651
CDP	-	-	-	-	-	-	-	-	-	-	244.48	10,544	244.48	10,544
No Plan	-	-	-	-	-	-	-	-	-	-			-	-
SP Process Initiated	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	65.80	1,484	1.26	32	86.40	3,367	23.66	1,438	7.24	646	244.48	10,544	428.83	17,511
% of Total	15%	8%	0%	0%	20%	19%	6%	8%	2%	4%	57%	60%	100%	100%
Density (units/hectare)	22.6		25.4		39.0		60.8		89.2		43.1		40.8	





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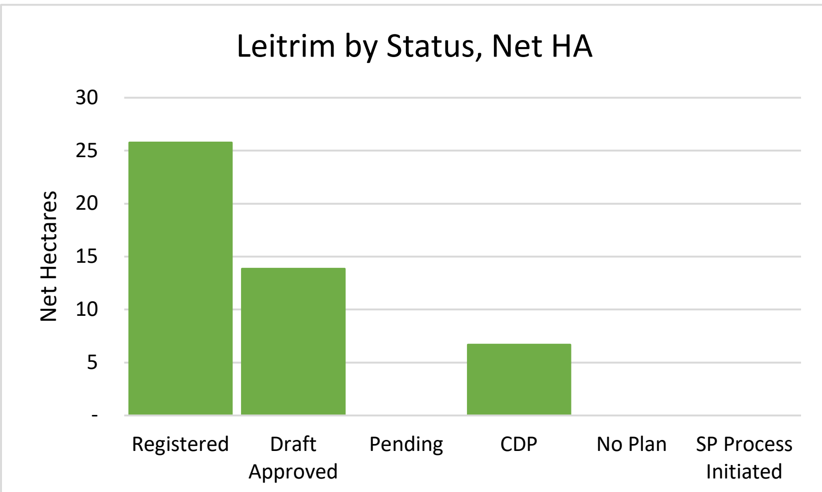
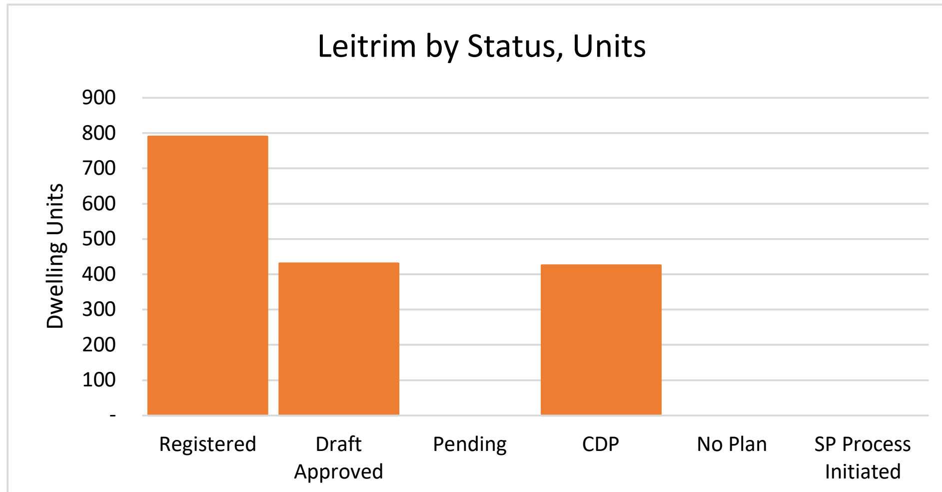
LEITRIM

HOUSING TYPE	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED USE		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	16.41	399	0.06	2	5.24	244	-	-	4.06	145	-	-	25.77	790
Draft Approved	8.62	194	-	-	5.24	237	-	-	-	-	-	-	13.86	431
Pending	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CDP	-	-	-	-	-	-	-	-	-	-	6.69	425	6.69	425
No Plan	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SP Process Initiated	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	25.03	593	0.06	2	10.48	481	-	-	4.06	145	6.69	425	46.32	1,646
% of Total	54%	36%	0%	0%	23%	29%	0%	0%	9%	9%	14%	26%	100%	100%
Density (units/hectare)	23.7		33.3		45.9		0.0		35.7		63.5		35.5	





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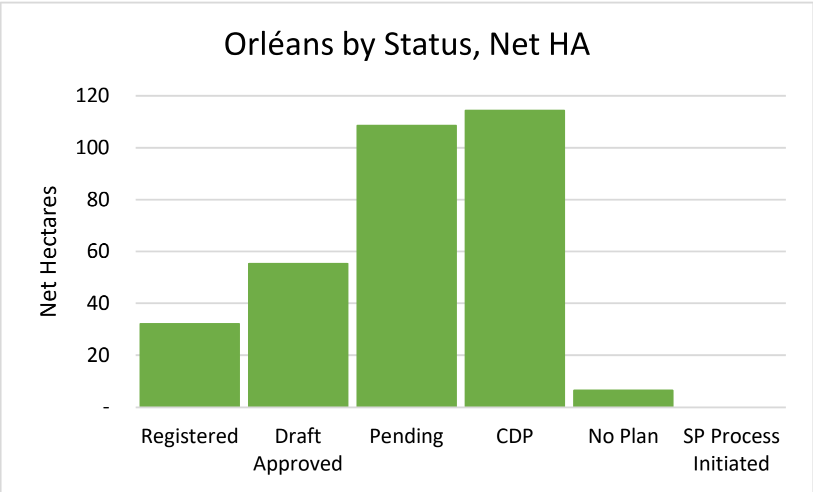
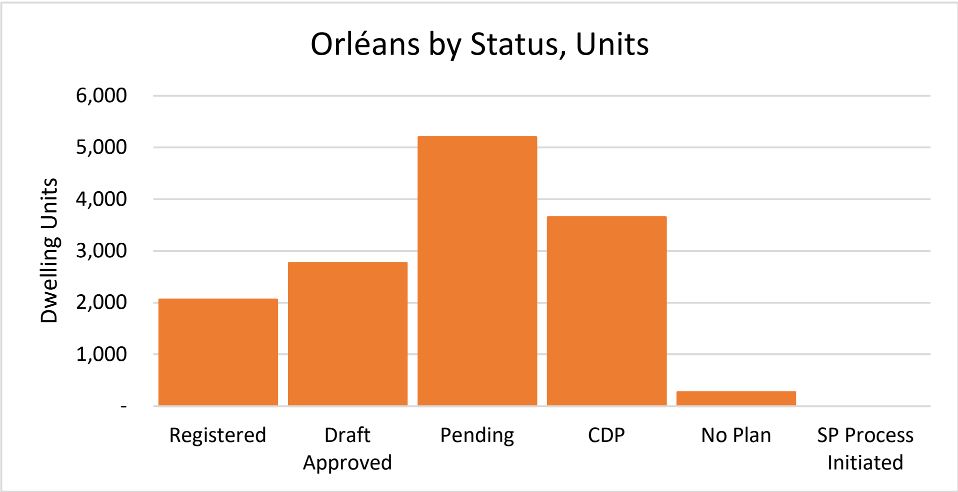
SP Process Initiated = Secondary Planning process has started

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	12.32	310	0.05	2	14.22	739	0.37	60	3.44	892	1.74	57	32.14	2,060
Draft Approved	25.67	905	2.64	104	15.42	876	11.57	881	-	-	-	-	55.29	2,766
Pending	42.48	1,092	0.51	14	42.92	2,130	5.26	395	17.30	1,570	-	-	108.46	5,201
CDP	-	-	-	-	-	-	-	-	-	-	114.23	3,648	114.23	3,648
No Plan	-	-	-	-	-	-	-	-	-	-	6.46	272	6.46	272
SP Process Initiated	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	80.46	2,307	3.20	120	72.56	3,745	17.19	1,336	20.74	2,462	122.42	3,977	316.58	13,948
% of Total	25%	17%	1%	1%	23%	27%	5%	10%	7%	18%	39%	29%	100%	100%
Density (units/hectare)	28.7		37.5		51.6		77.7		118.7		32.5		44.1	





Registered = Registered Plan
Draft Approved = Draft Approved Plan of Subdivision
Pending = Pending application for draft plan
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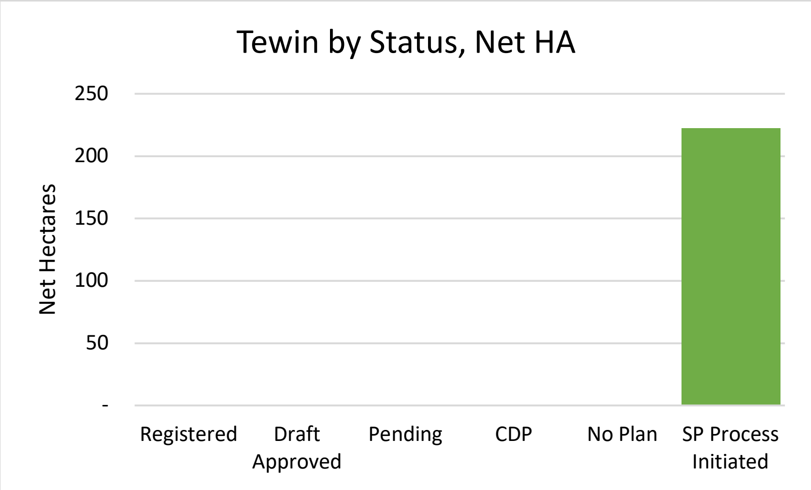
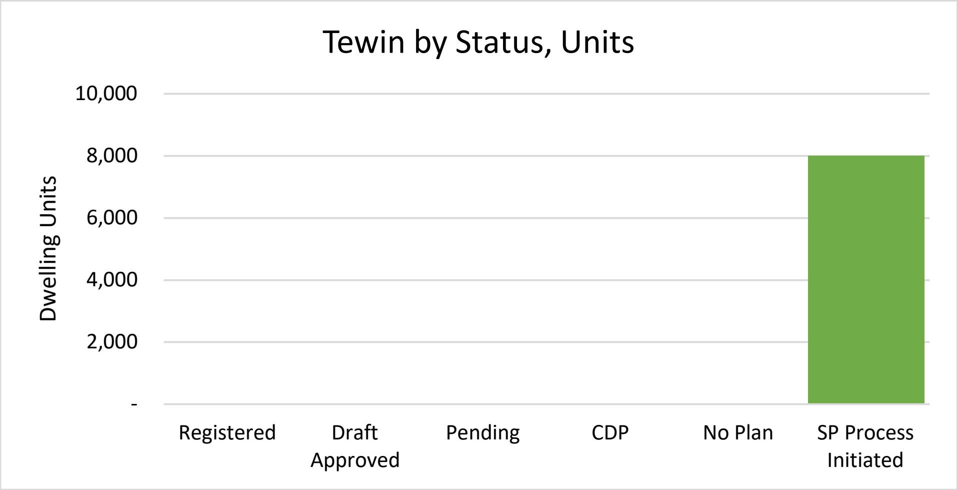
TEWIN

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	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Draft Approved	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pending	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CDP	-	-	-	-	-	-	-	-	-	-	-	-	-	-
No Plan	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SP Process Initiated	-	-	-	-	-	-	-	-	-	-	222.68	8,016	222.68	8,016
TOTAL	-	-	-	-	-	-	-	-	-	-	222.68	8,016	222.68	8,016
% of Total	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%	100%	100%
Density (units/hectare)	0.0		0.0		0.0		0.0		0.0		36.0		36.0	





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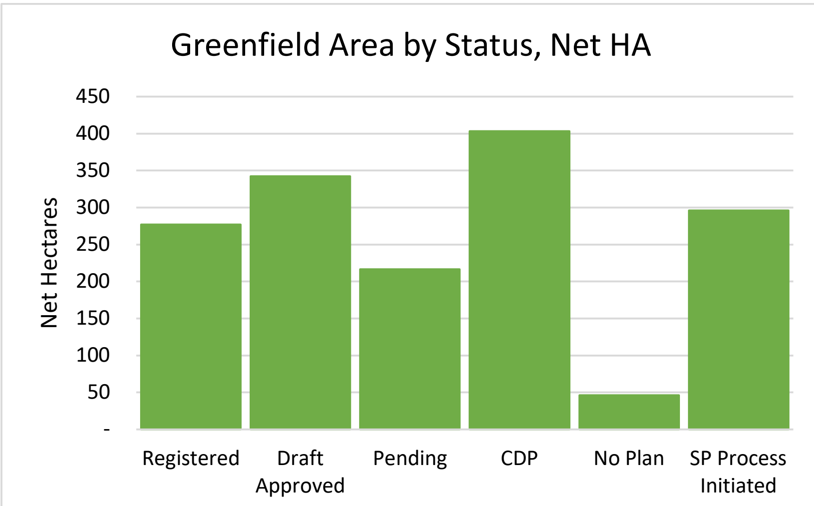
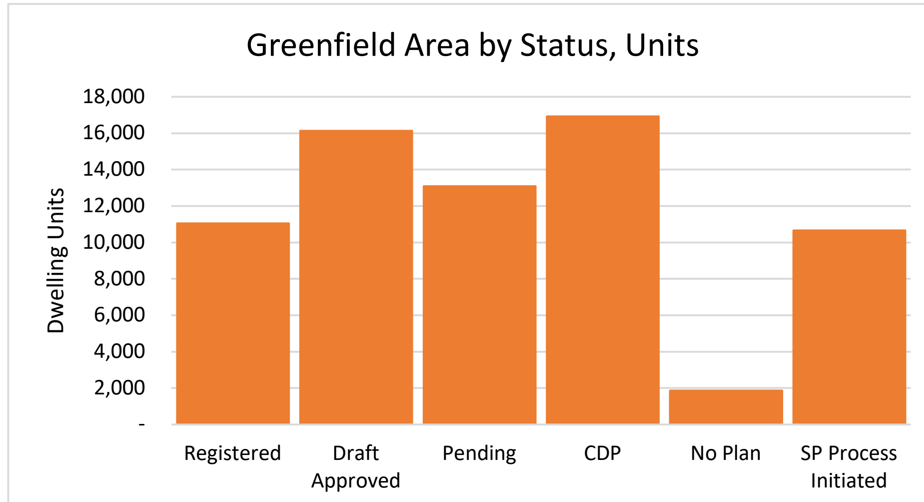
TOTAL GREENFIELD AREA

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	131.86	2,930	1.42	38	119.60	5,255	7.71	539	14.91	2,237	1.74	57	277.24	11,056
Draft Approved	127.62	3,325	7.20	268	135.86	6,483	54.84	4,057	16.84	1,998	-	-	342.35	16,131
Pending	81.91	2,103	1.42	52	89.09	4,645	14.74	1,165	29.54	5,124	-	-	216.69	13,089
CDP	-	-	-	-	-	-	-	-	-	-	403.29	16,932	403.29	16,932
No Plan	-	-	-	-	-	-	-	-	0.71	67	45.53	1,805	46.24	1,872
SP Process Initiated	-	-	-	-	-	-	-	-	-	-	296.01	10,656	296.01	10,656
TOTAL	341.38	8,358	10.03	358	344.56	16,383	77.28	5,761	62.00	9,426	746.56	29,450	1,581.82	69,736
% of Total	22%	12%	1%	1%	22%	23%	5%	8%	4%	14%	47%	42%	100%	100%
Density (units/hectare)	24.5		35.7		47.5		74.6		152.0		39.4		44.1	





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