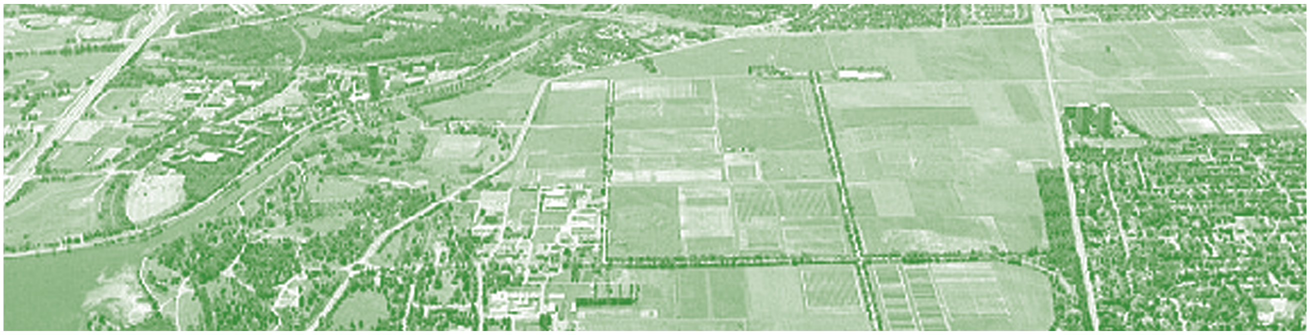
Ottawa

PLANNING AND GROWTH MANAGEMENT
URBANISME ET GESTION DE LA CROISSANCE

VACANT URBAN RESIDENTIAL LAND SURVEY

2015 UPDATE



City of Ottawa
Planning and Growth Management
April 2016

ottawa.ca
3-1-1
TTY 613-580-2401

Vacant Urban Residential Land Survey

2015 Update

City of Ottawa
Planning and Infrastructure

Planning and Growth Management Department

Policy Development and Urban Design Branch

April 2016

Due to its technical nature, this report is available in English only. The City of Ottawa may translate this report or parts thereof on request. Requests for translation should be forwarded to Stream Shen (stream.shen@ottawa.ca) or to the French Language Services Division at DSF-FLSD@ottawa.ca or (613) 580-2424, ext. 21536.

Compte tenu de la nature de ce rapport, il n'est disponible qu'en anglais. La Ville pourra, sur demande, traduire ce document au complet ou en partie. Les demandes de traduction doivent être présentées à Stream Shen (stream.shen@ottawa.ca) ou à la Division des services en français (DSF-FLSD@ottawa.ca ; au téléphone : (613) 580-2424, poste 21536).

TABLE OF CONTENTS

ANNEX

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
2015 UPDATE

1. INTRODUCTION

The Vacant Urban Residential Land Survey (VURLS) monitors the supply of vacant land in Ottawa's suburban areas 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 2,068 net hectares (ha) and 80,711 units at the end of 2015. 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 approximately 2039.

- The supply of registered and draft approved vacant land with servicing in 2015 (616 ha) represents a 6.5 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 (1,544 ha) is sufficient for about 16.4 years based on average demand over the past five years. By area, serviced supply is: Riverside South 69.0 years; Orléans 17.7 years; Kanata-Stittsville 15.0 years; Leitrim 9.3 years; and South Nepean 5.8 years.

- Consumption of urban residential land totalled 85 ha in 2015, below the five year average of 94 ha. Dwellings built on this land totalled 2,922 units, below the five-year average of 3,428 units.

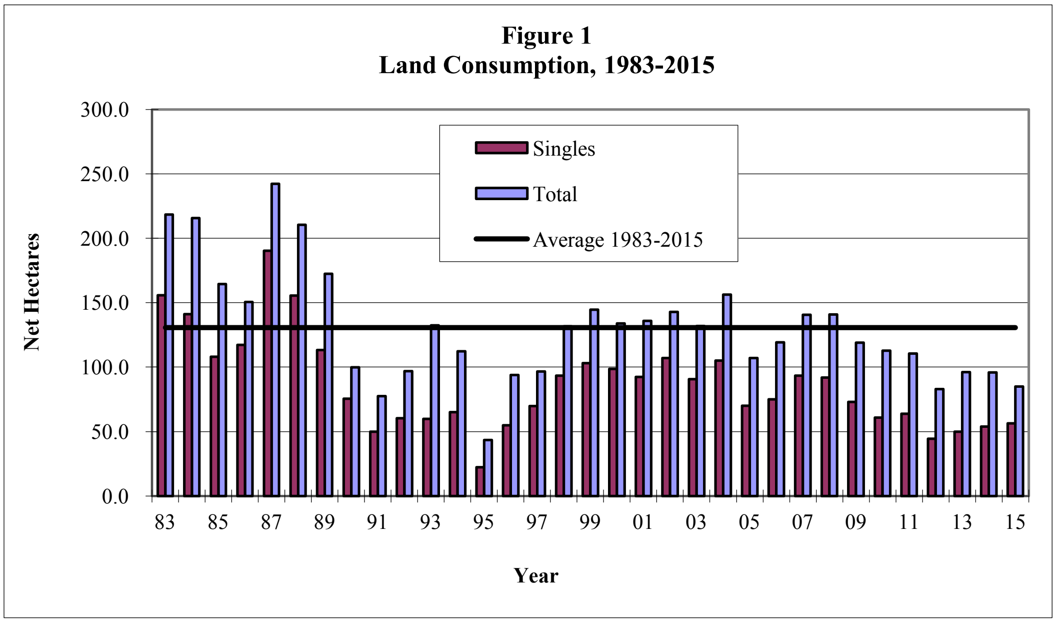
- The average density of housing built on land surveyed in 2015 was 34.4 units per net ha (upnh), slightly lower than the five-year average of 36.4 upnh.

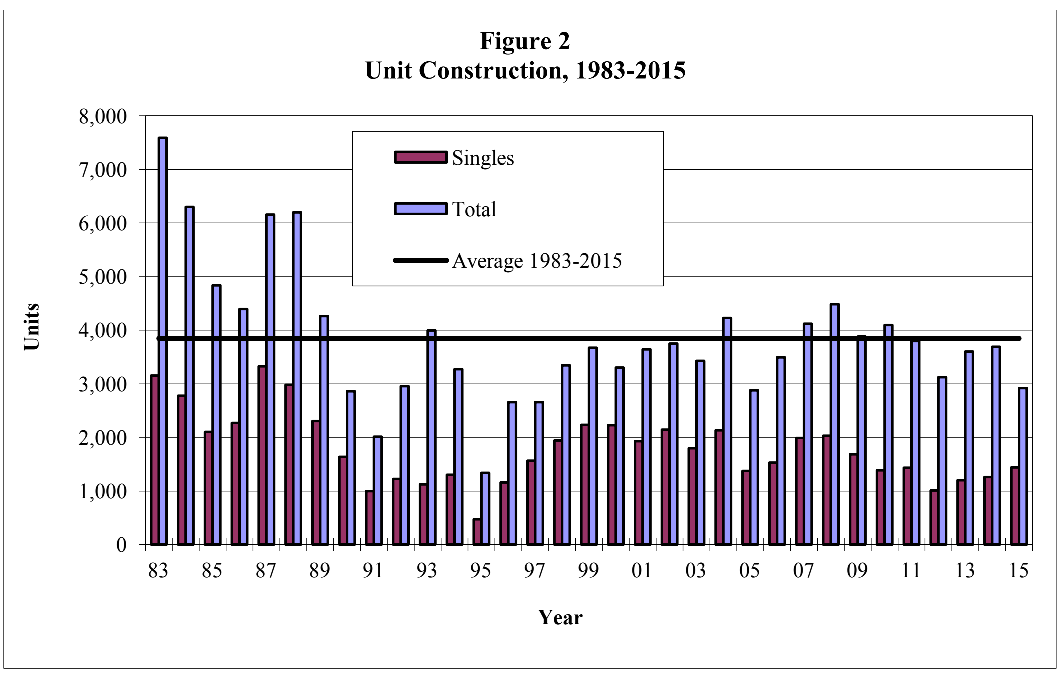
- Vacant land supply shares by area:
  - Kanata-Stittsville 36%
  - Riverside South 24%
  - Orléans 21%
  - South Nepean 13%
  - Leitrim 6%

[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.

- The ten largest landowners held 69% of the residential land supply in 2015. The five largest landowners by area were:
    - Riverside South Development Corporation 19%
    - Minto Group 9%
    - Richcraft Homes 8%
    - Claridge Homes 8%
    - Mattamy Homes 7%

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





3. PURPOSE OF THE SURVEY

This report describes the vacant urban residential land supply in Ottawa's suburbs 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 in terms of 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 2015. 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 have not been included since the 2013 survey as all potential is some form of redevelopment and intensification as defined in 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:

[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.

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 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 2015, land consumption totalled 84.9 ha, close to the five-year low of 83.1 ha consumed in 2012, and lower than the five-year average of 94.1 ha (Table 1 and Figure 1). Except for single-detached units, all dwelling types experienced a decline in land consumption from the previous year.

Table 1. Vacant Urban Residential Land Consumption, 2009-2015 (net ha)

	Year							
Unit Type	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**Avg. 2011-2015**
Single-detached	73.0	60.8	63.9	44.3	49.9	53.8	56.3	53.6
Semi-detached	5.2	6.8	6.4	5.0	5.4	3.3	1.9	4.4
Townhouse	36.7	36.2	33.8	27.7	32.3	32.2	24.6	30.1
Stacked Townhouse	3.1	6.4	4.7	4.3	3.5	4.1	1.4	3.6
Apartment	1.0	2.6	1.6	1.8	5.1	2.5	0.7	2.3
Total	**119.0**	**112.7**	**110.4**	**83.1**	**96.1**	**95.8**	**84.9**	**94.1**

Similar to the land consumption pattern, housing starts in 2015 tracked at a five-year low of 2,922 units, lower than the five-year average of 3,428 units (Table 2 and Figure 2). Except for single-detached units (1,439 starts), all dwelling types experienced a decline in housing starts from the previous year.

Table 2. Units Built on Vacant Urban Residential Land, 2009-2015

	Year							
Unit Type	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**Avg. 2011-2015**
Single-detached	1,683	1,388	1,434	1,013	1,204	1,263	1,439	1,271
Semi-detached	164	232	226	172	208	120	68	159
Townhouse	1,671	1,571	1,510	1,231	1,518	1,610	1,263	1,426
Stacked Townhouse	242	460	386	382	195	302	92	271
Apartment	125	447	242	326	479	397	60	301
Total	**3,885**	**4,098**	**3,798**	**3,124**	**3,604**	**3,692**	**2,922**	**3,428**

Source: CMHC Starts

Table 3a shows the distribution of land developed in 2015. Kanata-Stittsville led all areas with 41% of total land developed. South Nepean retracted from last year's 33% to 26% of total land developed, accounting for 9.4 ha of the total 10.9 ha city-wide consumption decline in 2015. All other areas remained relatively stable compared to the previous year.

Table 3a

Vacant Land Developed by Area, 2009-2015 (net ha)

Area	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**5-Year Avg. 2011-2015**
Kanata-Stittsville	36.0	39.0	29.7	22.7	37.5	34.0	34.6	31.7
% of Total	*30.2%*	*34.6%*	*26.9%*	*27.4%*	*39.0%*	*35.5%*	*40.8%*	*33.7%*
South Nepean	39.2	32.0	38.1	23.8	25.9	31.4	22.0	28.2
% of Total	*32.9%*	*28.4%*	*34.5%*	*28.6%*	*27.0%*	*32.7%*	*25.9%*	*30.0%*
Riverside South	5.3	5.9	3.3	7.1	9.8	9.1	7.0	7.2
% of Total	*4.4%*	*5.2%*	*3.0%*	*8.6%*	*10.2%*	*9.4%*	*8.2%*	*7.7%*
Leitrim	8.3	9.1	7.9	9.5	8.0	7.0	6.8	7.8
% of Total	*6.9%*	*8.1%*	*7.2%*	*11.5%*	*8.3%*	*7.3%*	*8.0%*	*8.3%*
Orléans	30.3	26.7	31.4	19.9	15.0	14.4	14.5	19.0
% of Total	*25.5%*	*23.7%*	*28.5%*	*24.0%*	*15.6%*	*15.0%*	*17.1%*	*20.2%*
Total	**119.0**	**112.7**	**110.4**	**83.0**	**96.1**	**95.8**	**84.9**	**94.1**

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

In 2015, all areas experienced a decline in housing starts compared to 2014 (Table 3b). Kanata-Stittsville (1,131 units), Riverside South (228 units), and Leitrim (231 units) housing starts tracked closely to their five-year average, while South Nepean (847 units) and Orléans (485 units) experienced a greater decline from earlier highs.

Table 3b

Units Built on Vacant Land by Area, 2009-2015 (net ha)

Area	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**5-Year Avg. 2011-2015**
Kanata-Stittsville	1,126	1,313	909	950	1,396	1,406	1,131	1,158
% of Total	*29.0%*	*32.0%*	*23.9%*	*30.4%*	*38.7%*	*38.1%*	*38.7%*	*33.8%*
South Nepean	1,333	1,420	1,455	922	933	1,065	847	1,044
% of Total	*34.3%*	*34.7%*	*38.3%*	*29.5%*	*25.9%*	*28.9%*	*29.0%*	*30.5%*
Riverside South	155	168	60	197	337	333	228	231
% of Total	*4.0%*	*4.1%*	*1.6%*	*6.3%*	*9.4%*	*9.0%*	*7.8%*	*6.7%*
Leitrim	264	289	237	279	282	266	231	259
% of Total	*6.8%*	*7.1%*	*6.2%*	*8.9%*	*7.8%*	*7.2%*	*7.9%*	*7.6%*
Orléans	1,007	908	1,137	776	656	620	485	735
% of Total	*25.9%*	*22.2%*	*29.9%*	*24.8%*	*18.2%*	*16.8%*	*16.6%*	*21.4%*
Total	**3,885**	**4,098**	**3,798**	**3,124**	**3,604**	**3,690**	**2,922**	**3,428**

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

Densities

In 2015, average net density[1] of development was 34.4 units per net ha (upnh) (Table 4), lower than the five-year average of 36.4 upnh. Although single-detached and townhouse density both increased to all-time highs (two dwelling types that have historically accounted for 79 percent of built units on VURLS parcels), a mix of more single-detached units and fewer higher density housing starts in 2015 led to a lower average built density.

Table 4

Built Densities on VURLS Parcels, 2009-2015 (units per net hectare)

Unit Type	2009	2010	2011	2012	2013	2014	2015	5-Year Weighted Average* 2011-2015
Single-detached	23.1	22.8	22.4	22.9	24.1	23.5	25.6	23.7
Semi-detached	31.6	34.2	35.5	34.2	38.3	36.9	35.2	36.1
Townhouse	45.5	43.4	44.7	44.4	47.0	50.0	51.3	47.4
Stacked Townhouse	77.3	72.3	81.4	89.7	56.2	74.2	65.2	75.6
Apartment	131.6	173.9	148.5	185.2	94.5	156.9	88.2	128.9
Weighted Average	**32.7**	**36.4**	**34.4**	**37.6**	**37.5**	**38.5**	**34.4**	**36.4**

* 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 2009 to 2015 period.

In 2015, the average density of single-detached units increased to 25.6 upnh, the highest ever recorded by the survey (Table 5). Kanata-Stittsville (25.9 upnh), South Nepean (26.8 upnh), Leitrim (24.1 upnh) and Orléans (25.6 upnh) all tracked higher than their five-year averages, the exception being Riverside South (20.4 upnh).

Table 5

Single-Detached Development Densities, 2009-2015 (units per net hectare)

Area	2009	2010	2011	2012	2013	2014	2015	5-Year Weighted Average 2011-2015
Kanata-Stittsville	21.8	20.5	20.7	21.5	24.6	23.7	25.9	23.8
South Nepean	24.9	25.2	22.8	23.1	24.2	23.2	26.8	23.8
Riverside South	22.9	21.8	17.6	18.9	21.6	21.7	20.4	20.2
Leitrim	19.7	21.7	21.3	22.6	21.9	24.4	24.1	22.8
Orléans	22.6	23.8	24.7	24.9	25.6	24.2	25.6	25.0
Weighted Average	**23.1**	**22.8**	**22.4**	**22.9**	**24.1**	**23.5**	**25.6**	**23.7**

[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.

Semi-detached units developed at an average of 35.2 upnh in 2015, lower than the five-year average of 36.1 upnh (Table 6a). Riverside South, Leitrim, and Orléans had no semi-detached starts in 2015.

Table 6a

Semi-Detached Development Densities, 2009-2015 (units per net hectare)

Area	2009	2010	2011	2012	2013	2014	2015	5-Year Weighted Average 2011-2015
Kanata-Stittsville	28.8	31.3	35.5	37.0	35.9	35.7	40.0	36.6
South Nepean	35.7	38.1	35.7	33.3	38.2	36.9	33.3	35.6
Riverside South	-	33.3	-	-	-	-	-	-
Leitrim	35.4	34.4	35.0	36.4	37.9	40.0	-	36.9
Orléans	30.0	27.3	36.0	25.9	46.8	33.3	-	35.2
Weighted Average	**31.6**	**34.2**	**35.5**	**34.2**	**38.3**	**36.9**	**35.2**	**36.1**

In 2015, the density of townhouses rose to 51.3 upnh, the highest ever recorded by the survey (Table 6b). This is partly due to the increased presence of back-to-back townhouse and rear-lane townhouse products which yield higher than average densities.

Table 6b

Townhouse Development Densities, 2009-2015 (units per net hectare)

Area	2009	2010	2011	2012	2013	2014	2015	5-Year Weighted Average 2011-2015
Kanata-Stittsville	43.2	39.8	41.9	41.4	49.3	54.0	56.5	48.0
South Nepean	49.2	48.4	44.3	53.1	50.5	47.5	51.7	49.1
Riverside South	43.4	42.0	44.4	35.3	39.1	43.1	43.5	40.1
Leitrim	47.5	43.6	48.6	43.9	46.8	44.7	43.1	45.3
Orléans	45.1	45.4	47.4	45.7	44.1	54.9	51.9	48.5
Weighted Average	**45.5**	**43.4**	**44.7**	**44.4**	**47.0**	**50.0**	**51.3**	**47.4**

Stacked townhouse densities decreased to 65.2 upnh in 2015 (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, 2009-2015 (units per net hectare)

Area	2009	2010	2011	2012	2013	2014	2015	5-Year Weighted Average 2011-2015
Kanata-Stittsville	-	61.5	65.0	93.2	66.7	58.3	-	74.8
South Nepean	93.5	83.3	86.0	86.1	65.3	81.5	63.8	79.7
Riverside South	107.7	62.5	-	-	87.5	75.0	66.7	73.1
Leitrim	75.0	70.6	-	-	-	74.1	70.6	73.5
Orléans	54.2	61.3	81.7	90.6	49.1	90.6	-	71.0
Weighted Average	**77.3**	**72.3**	**81.4**	**89.7**	**56.2**	**74.2**	**65.2**	**75.5**

Apartment densities (Table 7) averaged 88.2 upnh, lower than the five-year average of 128.9 upnh. As with stacked townhouses, apartment densities often experience substantial changes from year-to-year.

Table 7								
Apartment Development Densities, 2009-2015 (units per net hectare)								
Area	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**5-Year Weighted Average 2011-2015**
Kanata-Stittsville	-	317.4	-	238.9	131.6	287.4	-	199.1
South Nepean	81.3	142.7	153.5	139.0	106.7	37.3	105.9	117.7
Riverside South	-	-	-	-	88.4	-	-	88.4
Leitrim	-	-	-	-	-	-	70.6	70.6
Orléans	141.8	-	114.3	154.0	70.6	91.6	-	88.6
Weighted Average	**131.6**	**173.9**	**148.5**	**185.2**	**94.5**	**156.9**	**88.2**	**128.9**

In 2015, South Nepean had the highest overall development density at 38.5 upnh. Other areas clustered between 32 and 34 upnh. (Table 8).

Table 8								
Total Development Densities (all unit types), 2009-2015 (units per net hectare)								
Area	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**5-Year Weighted Average 2011-2015**
Kanata-Stittsville	31.3	33.7	30.6	41.8	37.2	41.4	32.7	36.6
South Nepean	34.0	44.3	38.2	38.8	36.0	33.9	38.5	37.0
Riverside South	29.4	28.4	18.3	27.6	34.5	36.8	32.6	31.9
Leitrim	32.0	31.7	29.8	29.3	35.4	38.3	34.1	33.1
Orléans	33.2	34.1	36.2	39.0	43.8	43.1	33.4	38.6
Weighted Average	**32.7**	**36.4**	**34.4**	**37.6**	**37.5**	**38.5**	**34.4**	**36.4**

<u>10 Year Demand Projection</u>

New city-wide housing requirements for the 2016-2025 decade are projected to average 5,887 units per year, including units required for a vacancy rate and to replace demolitions.

Housing demand will be met through a combination of intensification, units built in the rural area (9% of new units), and construction on vacant greenfield land. Intensification targets over the decade average 40.6% of new urban units (based on the Official Plan). As shown in Table 9, construction on vacant greenfield land is projected to be approximately 3,185 units annually.

Table 9		
Projected Housing Demand in Ottawa, 2016-2025*		
	10 year Requirement	Annual Requirement
Total Unit Requirements	**58,869**	5,887
Allowance for rural units (9% of new units)	-5,298	-530
Total Urban Demand	**53,571**	5,357
Allowance for intensification (40.6%)	-21,726	-2,173
Unit demand on Vacant Urban Residential Land	**31,845**	**3,185**

*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 94.2 net ha per year over the next decade, as set out in Table 9a.

Table 9a			
Annual Demand for Housing on VURLS Land, 2016-2025			
Type	**Units**	**Density**	**Land (ha)**
Single-detached	1,389	23.7	58.6
Semi-detached	205	36.1	5.7
Townhouses	1,252	47.4	26.4
Stacked towns/Apartments	339	96.5	3.5
Total	**3,185**		**94.2**

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 2015, there were 2,068 ha of vacant residential land in the suburban areas of Ottawa, with a total estimated development potential of 80,711 units. Out of the total supply, 64 ha would, when developed, be classified as urban intensification under the City's Official Plan definition because they are located within previously developed areas.

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 2015, 31% of the land supply was in registered and draft approved plans (7% registered, 24% draft approved). Of the remaining land, 7% had pending submissions and 61% had no plan. Kanata-Stittsville accounted for 36% of the total land supply, Riverside South 24%, Orléans 21%, South Nepean 13%, and Leitrim 6%.

Table 10										
Urban Residential Land Supply and Unit Potential by Development Status and Area, December 2015										
	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	69.3	3,455	235.0	7,222	77.5	3,299	363.4	14,127	745.1	28,103
South Nepean	35.8	1,961	30.4	1,428	13.2	805	188.9	12,235	268.3	16,429
Riverside South	9.2	311	81.2	4,025	26.8	833	379.9	9,779	497.1	14,948
Leitrim	11.1	397	61.4	1,979	15.1	542	32.0	1,088	119.6	4,006
Orléans	28.5	1,377	91.7	3,861	20.1	1,385	298.0	10,602	438.2	17,225
Total	**154.0**	**7,501**	**499.6**	**18,515**	**152.8**	**6,864**	**1,262.1**	**47,831**	**2,068.4**	**80,711**

Land Ownership

The holdings of the ten largest landowners (Table 11) outside the Greenbelt increased to 69% of total vacant land in 2015, up from 65% in 2014. In 2015, the five largest landowners were Riverside South Development Corporation (RSDC) (19% of the total land supply), Minto Group (9%), Richcraft Homes (8%), Claridge Homes (8%), and Mattamy Homes (7%).

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.

Table 11

Share of Total Vacant Urban Land of 10 Largest Landowners, 2011-2015

	Net Hectares Owned					% of all Vacant Urban Land				
Owner Name	**2011**	**2012**	**2013**	**2014**	**2015**	**2011**	**2012**	**2013**	**2014**	**2015**
Riverside South Dev. Corp.	-	-	346.80	340.6	382.7	-	-	15.51	15.6	18.5
Minto Group	189.2	208.8	204.7	197.9	174.8	9.5	8.8	9.2	9.1	8.5
Richcraft Homes	241.4	238.2	164.6	149.6	170.5	12.1	10.0	7.4	6.9	8.2
Claridge Homes	95.5	118.8	109.4	77.0	155.6	4.8	5.0	4.9	3.5	7.5
Mattamy Homes	124.1	124.4	117.2	179.4	137.7	6.2	5.2	5.2	8.2	6.7
Tamarack Homes	74.7	133.7	128.0	122.7	110.3	3.7	5.6	5.7	5.6	5.3
KNL Developments	113.8	113.3	106.4	106.4	97.4	5.7	4.8	4.8	4.9	4.7
Tartan Homes	47.7	59.9	73.5	64.9	79.9	2.4	2.5	3.3	3.0	3.9
The Regional Group	-	-	104.50	99.3	74.3	-	-	4.67	4.6	3.6
CRT Developments Inc.	76.4	76.4	76.4	76.4	74.0	3.8	3.2	3.4	3.5	3.6
Ashcroft Homes	74.8	72.6	-	-	-	3.7	3.0	-	-	-
Urbandale Homes	227.0	234.8	-	-	-	11.4	9.9	-	-	-
Total, Top 10 Owners	**1,264.6**	**1,380.9**	**1,431.5**	**1,414.2**	**1,436.0**	**63.4**	**57.9**	**64.0**	**64.8**	**69.4**
Total Vacant Land	**1,994.9**	**2,383.3**	**2,236.4**	**2,181.2**	**2,068.4**	**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 25 owners listed in the table controlled about 86% of the supply at the end of 2015. 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 Developments (13%), CRT Developments (10%), and Richcraft Homes (10%). The 15 owners with 10 or more ha accounted for 82% of the total land supply.

South Nepean: Three owners accounted for 59% of the vacant land; Mattamy Homes (26%), Minto Group (25%), and Tamarack Homes (8%). There were six owners with 10 or more ha, accounting for 74% of the total supply.

Riverside South: The largest landowner in Riverside South was the RSDC partnership of Urbandale Construction and Richcraft Homes which owned 77% of the vacant land. Overall, the six listed in Table 12 owned 95% of the land supply.

Leitrim: The Regional Group and Tartan Homes held 34% and 28% of the supply respectively, in total accounting for 62% of Leitrim land. The four major owners had 94% of the supply.

Orléans: Four land owners controlled 62% of the land supply; Tamarack Homes (17%), Claridge Homes (16%), Minto Group (15%), and Richcraft Homes (13%). The seven major owners held 86% of the supply.

Table 12

Residential Land Supply of Major Landowners (10 net ha and larger) by Area and Development Status, December 2015

Area	Owner Name	Registered	Draft Approved	Pending	No Plan	Total (net ha)
Kanata-Stittsville	KNL Developments	-	96.0	-	1.4	97.4
	CRT Developments	-	30.7	-	43.3	74.0
	Richcraft Homes	-	16.3	21.5	35.4	73.2
	Del Corporation Limited	-	-	-	50.7	50.7
	Tartan Homes	4.3	21.4	21.2	-	46.9
	Monarch Group	9.9	-	1.0	30.1	41.1
	Minto Group	7.0	-	13.0	20.7	40.7
	M & A Rentals	-	-	-	38.2	38.2
	The Regional Group	1.9	31.7	-	-	33.6
	Metcalfe Realty	-	-	-	29.7	29.7
	Mattamy Homes	7.8	17.0	-	-	24.8
	Junic/Multivesco	-	-	-	23.9	23.9
	Valecraft/Rivard, J.G.	-	-	-	21.7	21.7
	Cavanagh	0.5	-	-	11.5	12.0
South Nepean	Mattamy Homes	-	6.6	10.2	52.8	69.6
	Minto Group	1.6	14.6	-	51.3	67.4
	Tamarack Homes	3.0	7.8	-	11.1	21.9
	Richcraft Homes	2.3	-	2.4	11.3	16.1
	Kennedy, Patrick	-	-	-	12.9	12.9
	Claridge Homes	1.9	-	0.5	9.4	11.8
Riverside South	Riverside South Development Corp.	4.5	81.2	25.9	271.2	382.7
	Claridge Homes	1.9	-	1.0	35.4	38.3
	Hakim, Antoine	-	-	-	16.7	16.7
	Cardel Homes	-	-	-	12.7	12.7
	Richcraft Homes	2.6	-	-	9.0	11.5
	Mion, Luigi	-	-	-	11.3	11.3
Leitrim	The Regional Group	-	29.2	-	11.6	40.8
	Tartan Homes	3.7	29.3	-	-	33.0
	Claridge Homes	3.6	-	-	20.4	24.0
	Urbandale Construction	-	-	15.1	-	15.1
Orléans	Tamarack Homes	0.5	29.9	-	42.9	73.3
	Claridge Homes	4.1	8.9	-	58.9	71.9
	Minto Group	10.3	38.4	2.6	15.5	66.8
	Richcraft Homes	5.6	-	-	53.3	58.9
	Mattamy Homes	-	-	14.7	28.6	43.3
	Ashcroft Homes	-	13.8	-	26.5	40.4
	Legault	0.8	-	-	20.8	21.6
Total (net ha)		**77.8**	**472.5**	**129.2**	**1,090.0**	**1,769.5**

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 reached 40.8 upnh, up from the planned 38.3 upnh observed in 2014. Except for semi-detached units, actual densities have been higher than shown in the table.

Table 13 Unit Potential and Density by Unit Type, 2015 Registered, Draft Approved and Pending Lands				
Unit Type	**Units**	**% of Grand Total**	**Hectares**	**Units/Hectare**
Single-detached	7,718	9.6	326.8	23.6
Semi-detached	724	0.9	19.6	36.9
Townhouses	8,750	10.8	192.7	45.4
Stacked Townhouses	3,480	4.3	50.4	69.0
Apartments	5,474	6.8	45.7	119.8
Sub-total	*26,146*	*32.4*	*635.2*	*41.2*
Mixed Units	6,734	8.3	171.2	39.3
Total with Plans	**32,880**	**40.7**	**806.4**	**40.8**
No Plan Lands				
Mixed Units	47,830	59.3	1,262.1	37.9
Grand Total	**80,710**	**100.0**	**2,068.5**	**39.0**

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 the 2005 PPS.

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.

In 2015, the City's vacant urban residential land supply, excluding intensification parcels, stood at 2,004 ha. Based on projected demand of 94.2 net ha per year over the next decade and declining demand thereafter, the land supply outside the Greenbelt 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 greenfield land of 94.2 ha (Table 9a), the serviced registered and draft approved land supply of 615.6 ha is sufficient for 6.5 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 94.1 per year is in line with the projected annual demand of 94.2 ha per year. After calculation, the supply is sufficient for 8.4 years in Kanata-Stittsville, 2.4 years in South Nepean, 12.6 years in Riverside South, 9.3 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 6.5 years (Table 14).

Table 14

Serviced Registered and Draft Approved Land, December 2015

Area	**Serviced Land Supply (net ha)**	**Average Annual Consumption (net ha)**	**Demand Years of Supply***
Kanata-Stittsville	266.3	31.7	8.4
South Nepean	66.3	28.2	2.4
Riverside South	90.4	7.2	12.6
Leitrim	72.5	7.8	9.3
Orléans	120.2	19.0	6.3
Total	**615.6**	**94.1**	**6.5**

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

There is a 6.9 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 2015, by Unit Type

Unit Type	**Registered and Draft Approved Land (net ha)**	**Projected Annual Consumption (net ha)**	**Demand Years of Supply**
Single-detached	265.0	58.6	4.5
Semi-detached	18.9	5.7	3.3
Townhouse	151.2	26.4	5.7
Stacks/Apartments	68.7	3.5	19.6
Mixed*	150.0	-	n/a
Total	**653.8**	**94.2**	**6.9**

*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 (1,544 ha) will be sufficient for 16.4 years. By area, servicing is adequate for about 15.0 years in Kanata-Stittsville, 5.8 years in South Nepean, 69.0 years in Riverside South, 9.3 years in Leitrim, and 17.7 years in Orléans.

Table 16

Serviced Land Supply and Consumption by Area, December 2015

Area	Serviced Land Supply (net ha)	Average Annual Consumption (net ha)	Demand Years of Supply*
Kanata-Stittsville	475.4	31.7	15.0
South Nepean	163.7	28.2	5.8
Riverside South	497.1	7.2	69.0
Leitrim	72.5	7.8	9.3
Orléans	335.7	19.0	17.7
Total	**1,544.4**	**94.1**	**16.4**

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 2015 met all policies of the Provincial Policy Statement for greenfield residential land. Ottawa's vacant residential land supply of 2,068 ha at the end of 2015 had an estimated potential for approximately 80,711 housing units. Based on projected annual consumption, the total suburban land supply is sufficient to approximately 2039.

ANNEX

URBAN RESIDENTIAL LAND SUPPLY, UNIT POTENTIAL AND APPROVAL STATUS BY AREA, DEC. 2015

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	40.31	1,019	2.36	82	13.73	677	5.45	360	7.47	1,317	-	-	69.32	3,455
Draft Approved	96.33	2,096	10.18	406	37.54	1,761	8.18	500	3.67	321	79.05	2,138	234.95	7,222
Pending	25.82	582	0.75	30	17.19	824	1.50	118	11.00	1,039	21.21	706	77.47	3,299
No Plan	-	-	-	-	-	-	-	-	7.06	900	356.33	13,227	363.39	14,127
TOTAL	162.46	3,697	13.29	518	68.46	3,262	15.13	978	29.20	3,577	456.59	16,071	745.13	28,103
% of Total	22%	13%	2%	2%	9%	12%	2%	3%	4%	13%	61%	57%	100%	100%
Density (u/ha)	22.8		39.0		47.6		64.6		122.5		35.2		37.7	

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	15.35	288	3.04	86	8.72	508	4.02	314	4.69	765	-	-	35.82	1,961
Draft Approved	17.80	486	0.13	8	8.61	463	0.57	36	-	-	3.33	435	30.44	1,428
Pending	6.60	216	-	-	3.32	184	1.99	160	1.29	245	-	-	13.20	805
No Plan	-	-	-	-	-	-	-	-	-	-	188.87	12,235	188.87	12,235
TOTAL	39.75	990	3.17	94	20.65	1,155	6.58	510	5.98	1,010	192.20	12,670	268.33	16,429
% of Total	15%	6%	1%	1%	8%	7%	2%	3%	2%	6%	72%	77%	100%	100%
Density (u/ha)	24.9		29.7		55.9		77.5		168.9		65.9		61.2	

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	4.55	89	-	-	4.07	168	0.61	54	-	-	-	-	9.23	311
Draft Approved	18.83	387	-	-	26.45	889	1.57	94	4.33	360	30.00	2,295	81.18	4,025
Pending	9.91	234	-	-	10.93	359	6.00	240	-	-	-	-	26.84	833
No Plan	-	-	-	-	-	-	-	-	-	-	379.87	9,779	379.87	9,779
TOTAL	33.29	710	-	-	41.45	1,416	8.18	388	4.33	360	409.87	12,074	497.12	14,948
% of Total	7%	5%	0%	0%	8%	9%	2%	3%	1%	2%	82%	81%	100%	100%
Density (u/ha)	21.3		0.0		34.16		47.4		83.1		29.5		30.1	

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	6.10	146	0.26	10	3.46	145	-	-	1.30	96	-	-	11.12	397
Draft Approved	35.14	829	0.24	8	18.88	787	1.28	91	2.92	176	2.90	88	61.36	1,979
Pending	9.52	242	-	-	4.92	230	-	-	0.70	70	-	-	15.14	542
No Plan	-	-	-	-	-	-	-	-	-	-	31.99	1,088	31.99	1,088
TOTAL	50.76	1,217	0.50	18	27.26	1,162	1.28	91	4.92	342	34.89	1,176	119.61	4,006
% of Total	42%	30%	0%	0%	23%	29%	1%	2%	4%	9%	29%	29%	100%	100%
Density (u/ha)	24.0		36.0		42.6		71.1		69.5		33.7		33.5	

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	11.28	284	0.24	10	8.47	418	3.26	244	5.22	421	-	-	28.47	1,377
Draft Approved	19.23	491	2.38	84	21.26	1,002	13.38	1,065	0.68	147	34.73	1,072	91.66	3,861
Pending	9.95	329	-	-	5.14	335	2.56	204	2.46	517	-	-	20.11	1,385
No Plan	-	-	-	-	-	-	-	-	1.09	336	296.86	10,266	297.95	10,602
TOTAL	40.46	1,104	2.62	94	34.87	1,755	19.20	1,513	9.45	1,421	331.59	11,338	438.19	17,225
% of Total	9%	6%	1%	1%	8%	10%	4%	9%	2%	8%	76%	66%	100%	100%
Density (u/ha)	27.3		35.9		50.3		78.8		150.37		34.2		39.3	

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	77.59	1,826	5.90	188	38.45	1,916	13.34	972	18.68	2,599	-	-	153.96	7,501
Draft Approved	187.33	4,289	12.93	506	112.74	4,902	24.98	1,786	11.60	1,004	150.01	6,028	499.59	18,515
Pending	61.80	1,603	0.75	30	41.50	1,932	12.05	722	15.45	1,871	21.21	706	152.76	6,864
No Plan	-	-	-	-	-	-	-	-	8.15	1,236	1,253.92	46,594	1,262.07	47,830
TOTAL	326.72	7,718	19.58	724	192.69	8,750	50.37	3,480	53.88	6,710	1,425.14	53,328	2,068.38	80,711
% of Total	16%	10%	1%	1%	9%	11%	2%	4%	3%	8%	69%	66%	100%	100%
Density (u/ha)	23.6		37.0		45.4		69.1		124.5		37.4		39.0	