GREENFIELD RESIDENTIAL LAND SURVEY

Mid-2021 UPDATE

City of Ottawa
Planning, Real Estate and Economic Development

September 2022

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Research and Forecasting

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Executive Summary

Greenfield Residential Land Survey, July 1, 2021

The city of Ottawa recently adopted a residential growth management strategy (RGMS) for the new Official Plan (OP) with a planning period from July 2018 to July 2046. The RGMS divides the urban area into two categories: a "built-up area" and "greenfield area". This new 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, as of July 1, 2018, of the urban area.

In addition to monitoring only greenfield lands, this report changes the 12-month reporting period from a calendar year to a mid-year to mid-year period, being July 1, 2020 to June 30, 2021, and land supply as of July 1, 2021.

As of July 1, 2021, the amount of urban greenfield land at the edge of the urban built-up area was approximately 1,587 hectares that have the potential to accommodate approximately 69,078 dwelling units.

Provincial Policy Statement (PPS) Land Requirement

The 2020 PPS requires a 15-year minimum residential land supply. Based on projected greenfield demand, the estimated 15-year greenfield supply is approximately 1,458 residential net hectares. As of July 1, 2021, the greenfield land supply of 1,587 ha is consistent with the PPS with regards to minimum residential land supply.

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 Policy Statement.

A residential growth management strategy (RGMS) for the new 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 and 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 will change to a Greenfield Residential Land Survey (GRLS) and will only monitor lands within the greenfield areas as of July 1, 2018. Intensification, including intensification parcels identified in previous VURLS reports, will be monitored through a new program and report in relation to the new Official Plan.

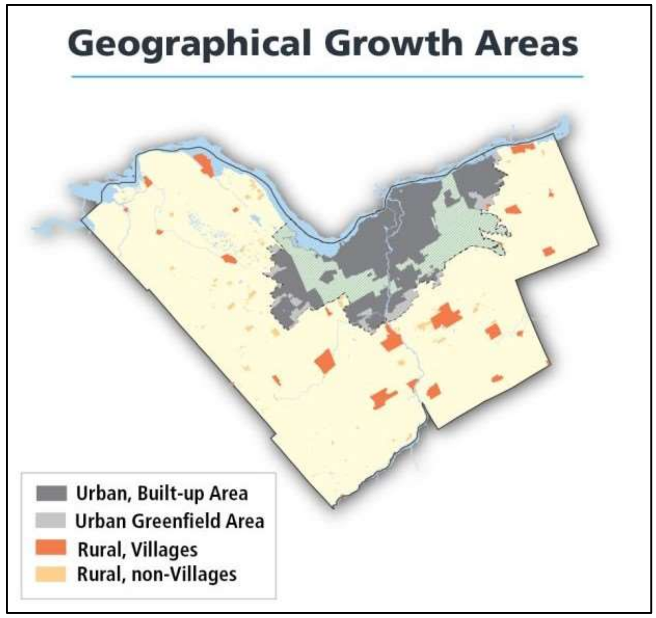
In addition to monitoring only greenfield lands, this report changes the 12-month reporting period from a calendar year to a mid-year to mid-year period, being July 1, 2020 to June 30, 2021, and estimates the greenfield land supply as of July 1, 2021.

The tables in the appendices are updated to a mid-year basis for the past five years for consistent consumption rates. Switching to a mid-year report allows direct comparisons/analysis to the Official Plan projections which are mid-year.

To help transition from previous Vacant Urban Residential Land Surveys to the Greenfield Residential Land Survey, there are now two appendices. Appendix 1 details the data for greenfield starts, consumption, and supply; and Appendix 2 details the data for starts, consumption, and supply on the intensification parcels identified in previous VURLS reports. Additionally, the parcel list and associated maps includes both the greenfield parcels and the intensification parcels from previous VURLS reports, which are identified by a grey label, but they are summarized separately, and analysis is only completed on the greenfield parcels.

The Greenfield Residential Land Survey will continue to assess whether there is sufficient greenfield land supply to support the growth projections of the Official Plan and the policy directions of the Provincial Policy Statement.

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 are not inventoried in this survey and the intensification parcels from previous reports are separated into Appendix 2. All of the enumerated greenfield and intensification parcels are categorized based on their ownership, location, size, unit potential and planning status. Field surveys, 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 VURLS report are used as the starting point for estimating the current year supply. Housing starts data supplied from CMHC represent residential housing units that started construction during the current year and are removed from the existing supply. Parcels are then analyzed and may be further revised based on more detailed information received in the current year. Final unit and land area supply for the study year is a result of removing newly constructed residential units and revisions to existing parcels. For the 2021 survey, starts from July 1, 2019 to June 30, 2021 were removed from the July 1, 2019 supply.

Two appendices are included in the report, one for greenfield parcels and one for intensification parcels in the suburban areas. Further details on each greenfield and intensification parcel are also provided on a separate parcel list and associated maps. However, analysis is only completed on the greenfield parcels.

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] Vacant 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, Community Design Plans and the Ottawa Official Plan.

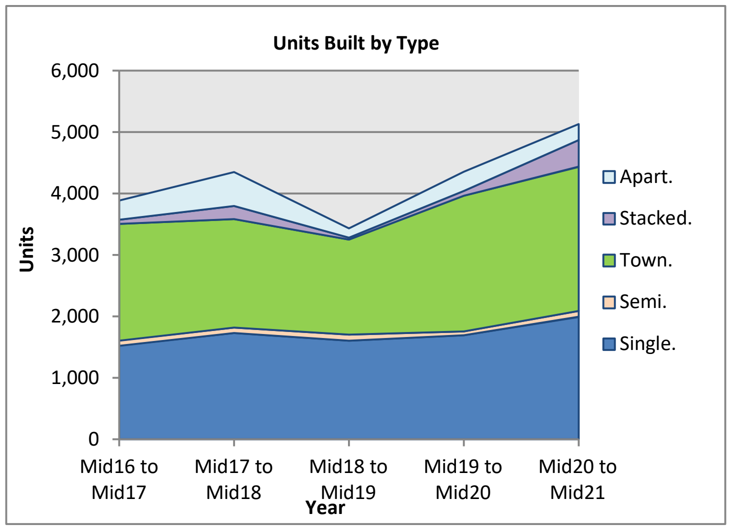
3. Consumption

Housing Starts

From mid-2020 to mid-2021, 5,131 housing starts occurred on greenfield parcels, higher than the five-year average of 4,008 units and a 17.9 per cent increase from mid-2019 to mid-2020. Orléans led all areas with 25.1 per cent of units developed, followed by Kanata-Stittsville at 24.8 per cent and South Nepean at 21.6 per cent. Orléans experienced the greatest year-over-year increase, while Kanata-Stittsville experienced a slight decrease year-over-year in housing starts.

Overall, townhouse units (2,345) surpassed single-detached units (1,995) with the highest share of starts by type. All unit types except apartments experienced an increase from the previous year, with the largest increase being stacked townhouses (436 units this year) and apartments decreasing slightly (260 units this year).

Greenfield Starts, July 2020 to June 2021	
Unit Type	Housing Starts
Single-detached	1,992
Semi-detached	98
Townhouse	2,345
Stacked Townhouse	436
Apartments	260
Total	5,131



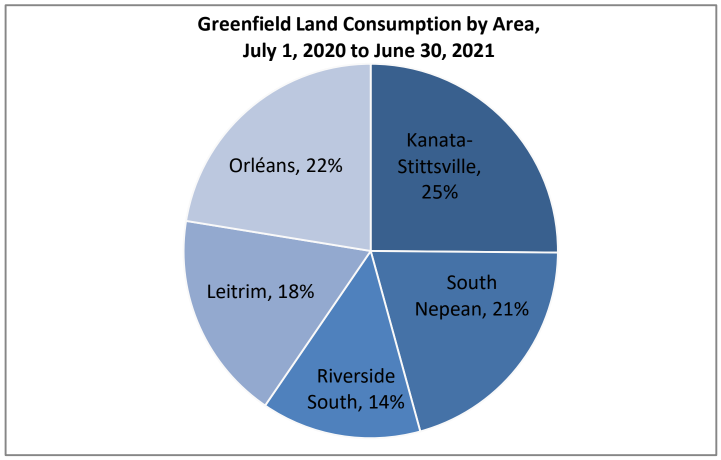
Over the past five-years, single-detached dwellings accounted for 41 per cent of greenfield housing starts. In mid-2020 to mid-2021, single-detached dwellings accounted for 39 per cent.

Greenfield Single-detached Shares		
Time period	Singles	Multiples
Mid-2016 to Mid-2017	43%	57%
Mid-2017 to Mid-2018	39%	61%
Mid-2018 to Mid-2019	47%	53%
Mid-2019 to Mid-2020	39%	61%
Mid-2020 to Mid-2021	39%	61%
5-year avg	41%	59%

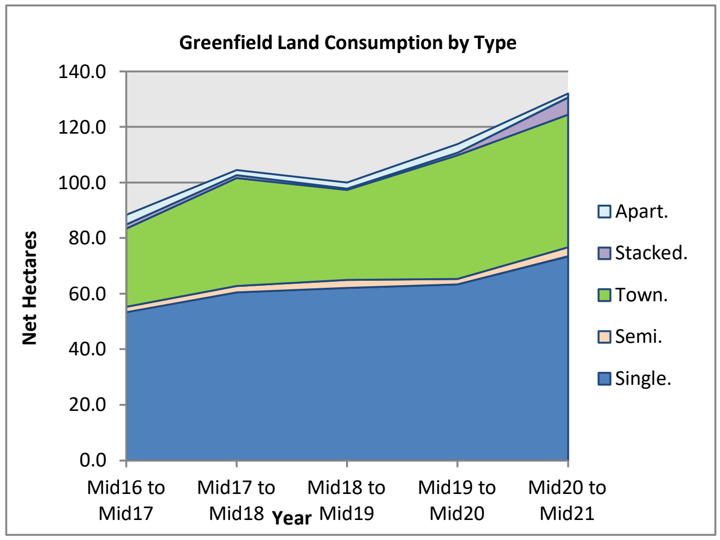
Further details on greenfield starts by dwelling type over the past 5-years are provided for in Table 1, Appendix 1.

Land Consumption

The 5,131 dwelling starts in mid-2020 to mid-2021 occurred on 132.1 ha. Kanata-Stittsville led all areas with 25.1 per cent of lands developed, followed by Orléans at 22.4 per cent. Orléans experienced the greatest year-over-year increase followed by South Nepean which had 20.6 per cent of all lands developed.



Land consumed by all unit types, except apartment units, increased from the previous year. Although townhouse construction surpassed that of single-detached, single-detached units consumed more land than any other unit type with 73.5 ha in mid-2021. Townhouse construction consumed 47.7 ha of land, stacked townhouses consumed 6.2 ha, semi-detached units consumed 3.3 ha and apartment units consuming the least amount of land at 1.4 ha.



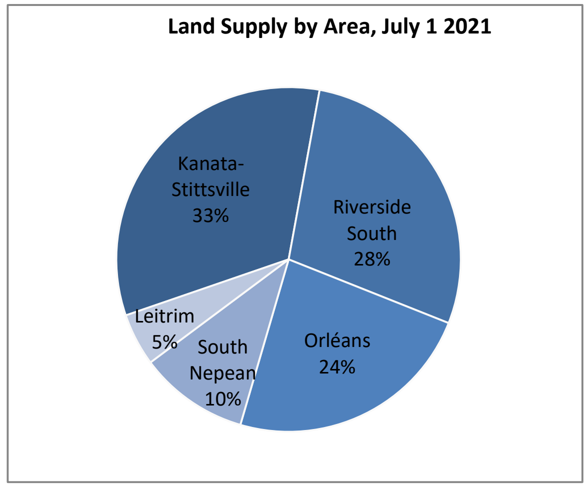
Further details on greenfield land consumption by dwelling type over the past 5-years are provided for in Table 2, Appendix 1. Tables 3a and 3b outlines the greenfield housing starts and their land consumption by suburban community over the past 5-years.

4. Residential Supply

After the 5,131 dwelling starts in mid-2020 to mid-2021 were removed from the greenfield inventory, parcels were analyzed and further revised based on more detailed information received until mid-2021. Based on these updates, as of July 1, 2021, there was approximately 1,587.3 ha of vacant residential greenfield land in Ottawa.

Kanata-Stittsville has the most supply with 526.5 ha (33.2 per cent), followed by Riverside South at 446.3 ha (28.1 per cent), Orléans at 373.3 ha (23.5 per cent), South Nepean at 163.3 ha (10.3 per cent), and Leitrim with 77.9 ha (4.9 per cent).

Greenfield Residential Supply by Area, July 1 2021		
Area	**Land Supply (net ha)**	**Unit Potential**
Kanata-Stittsville	526.5	21,582
Riverside South	446.3	18,195
Orléans	373.3	17,160
South Nepean	163.3	9,602
Leitrim	77.90	2,539
Total	**1,587.3**	**69,078**



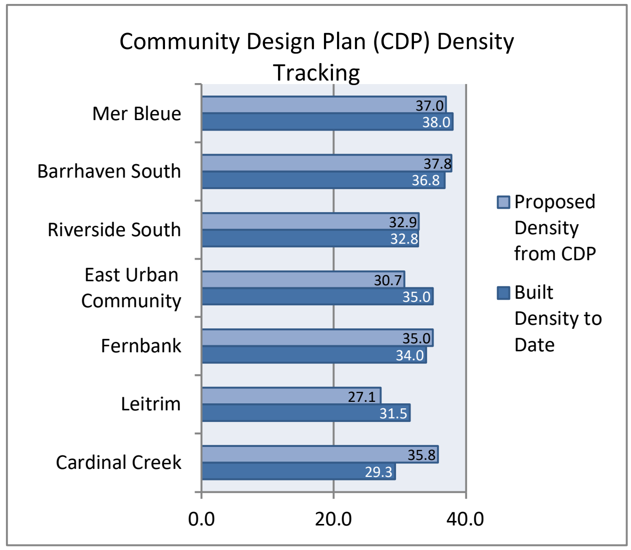
Determining the dwelling unit potential from the land supply is based on applications submitted through the development review process, calculations based on proposed dwelling counts from community design plans, and where neither is available, average development density for the sub-area that the subject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

- Table 4 outlines the built densities by dwelling type from mid-2016 to mid-2021
- Tables 5a through 5e outlines the built densities by dwelling type in each suburban area from mid-2016 to mid-2021
- Table 6 summarizes the densities for all units built by suburban area from mid-2016 to mid-2021, 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 as shown in the above table.

Community Design Plan Tracking

Community Design Plans (CDP) establish density targets and comparing what has been built to date within these areas monitors development trends since their approval. Out of the seven CDPs being tracked, Mer Bleue had the highest development density of 38.0 units per net hectare. Although Barrhaven South, 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.



5. Projected Residential Demand

The Provincial Policy Statement requires a minimum of 15-year supply of residential land to be maintained at all times. To assess how projections are tracking with this policy, land demand from the projected private market housing demand in the “Balanced Scenario” from the *RGMS for the New Official Plan*[2] is compared with actual land consumption. Over 89,600 dwellings are allocated to the greenfield portion of the urban area from 2018 to 2046, of which 53,597 dwellings are projected from 2021 to 2036, or 3,753 dwellings annually. From 2018 to 2021 greenfield demand was projected to be 4,850 per year; actual consumption was 4,300 per year.

Projected 15-year Residential Demand, 2021 to 2036		
Area	**15-year Projection**	**Average Annual**
Total City-wide Demand	113,170	7,545
Subtract Rural Demand	-7,361	-491
Total Urban Demand	105,809	7,054
Projected Intensification	52,212	3,481
Projected Greenfield	**53,597**	**3,573**

Note: based on the new Official Plan Growth Management Framework

To compare dwelling demand with land supply, the annual land requirement in residential net hectares for each dwelling type are estimated. The average density over the past five years (as calculated in Table 4, Appendix 1) are applied to the annual dwelling requirement. The density over the past five years are used to smooth annual fluctuations to derive estimated land consumption. Through this calculation, the annual land projection is 97.2 residential net hectares.

15-year Residential Land Projection per Year, 2021 to 2036			
Type	**Units Projection**	**5-Year Avg. Density**	**Land (net ha)**
Single-detached	1,523	26.2	58.1
Semi-detached	73	33.6	2.2
Townhouses	1,646	49.5	33.2
Stacked Towns /Apartments	331	88.4	3.7
All Dwellings Annual Projection	**3,573**		**97.2**

Note: Stacked townhouse/Apartments 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.

[2] Page 35, Figure 36. March 2020, City of Ottawa. *Residential Growth Management Strategy for the New Official Plan*. https://engage.ottawa.ca/8204/widgets/36458/documents/62364

6. Provincial Policy Statement

The *Provincial Policy Statement* (PPS) contains policies for residential land to ensure that supply is sufficient.

Policy 1.4.1

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

15-Year Supply Requirement (PPS) for Vacant Lands, July 2021 to June 2036	
	Net Hectares
Land Supply	1,587.3
Annual Demand, 2021-2036	97.2
15-year Demand	1,458.0

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.

3-Year Supply Requirement (PPS) for Registered and Draft Approved Vacant Lands with Servicing Capacity	
	Net Hectares
Land Supply	628.2
Annual Demand, 2021-2024	97.2
3-year demand	291.6

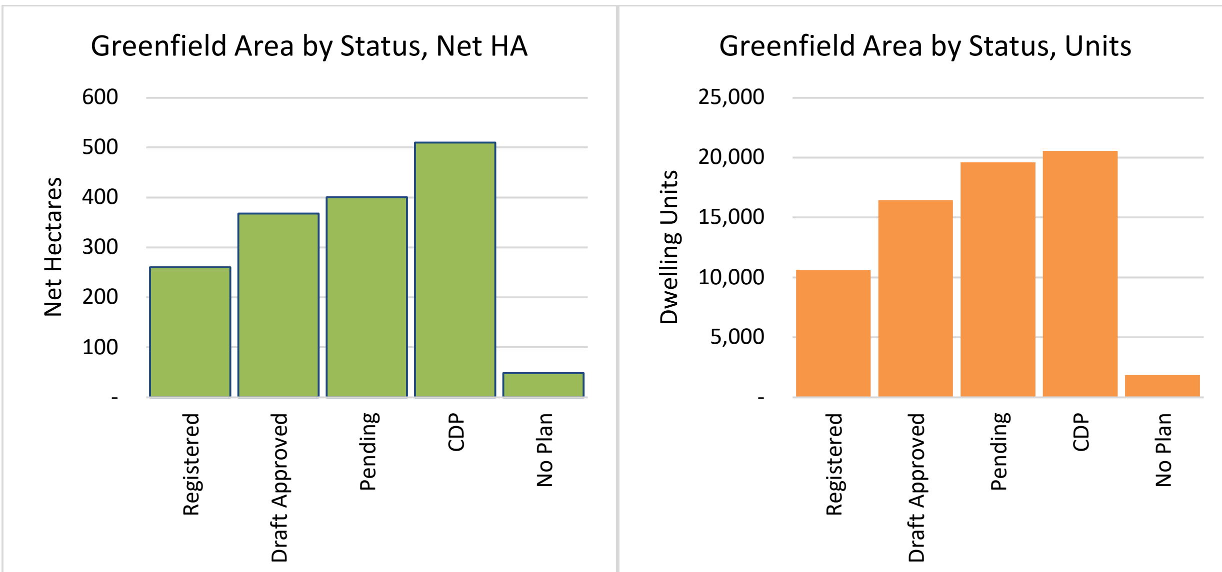
On July 1, 2022, the greenfield residential land supply was approximately 1,587.3 hectares. Based on projected greenfield demand of 97.2 hectares per year, over the next 15-years greenfield demand is estimated to require approximately 1,458.0 hectares. The registered (260.4 ha) and draft approved (367.8 ha) land supply, as shown on Table 7, Appendix 1, together provides for 628.2 hectares of serviced land, similarly exceeding the PPS requirement, and is sufficient for over six years.

<u>Greenfield Supply by Development Status</u>

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.

There are approximately 6.5 years of serviced land ready for development, 4 years of lands currently in application, 5 years of master planned lands ready for applications, and about 6-months of land with out any planning status.

Greenfield Residential Supply by Status, July 1 2021			
Development Status	**Land Supply (net ha)**	**Unit Potential**	**Projected Years Supply**
Registered	260.4	10,626	2.7
Draft Approved	367.8	16,456	3.8
Pending	400.4	19,589	4.1
CDP	510.0	20,544	5.2
No Plan	48.7	1,863	0.5
Total	**1,587.3**	**69,078**	**16.3**



As part of the new Official Plan, Council adopted an additional 1,281 net hectares of greenfield residential land. This additional land supply will supplement the 2021 supply of 1,587 hectares past 2036.

7. Conclusion

Overall, the supply of greenfield land for new housing in Ottawa as of July 1, 2021, is tracking closely to the growth projections of the new Official Plan and is consistent with the policies of the Provincial Policy Statement for greenfield residential land. Ottawa's greenfield residential land supply of 1,587.3 ha has an estimated potential for approximately 69,078 dwellings. Based on projected annual consumption of 97.2 hectares or 1,458.0 hectares over 15-years, this greenfield land supply is consistent with the Provincial Policy Statement requirement. The new Official Plan will also provide additional greenfield land to supplement the existing supply past 2036.

Appendix 1: Greenfield

Table 1: Housing Starts on Greenfield Residential Land, mid2016-mid2021

Unit Type	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-year Avg
Single-detached	1,392	1,523	1,601	1,693	1,992	1,640
Semi-detached	63	84	100	62	98	81
Townhouse	1,487	1,895	1,550	2,210	2,345	1,897
Stacked Townhouse	92	72	32	74	436	141
Apartment	203	311	150	314	260	248
Total	**3,237**	**3,885**	**3,433**	**4,353**	**5,131**	**4,008**

Table 2: Greenfield Land Consumption of Housing Starts, mid2016-mid2021 (net residential hectares)

Unit Type	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-year Avg
Single-detached	53.4	60.5	62.1	63.3	73.5	62.5
Semi-detached	1.9	2.2	2.8	2.0	3.3	2.4
Townhouse	28.1	38.9	32.5	44.5	47.7	38.3
Stacked Townhouse	1.5	1.0	0.4	0.9	6.2	2.0
Apartment	3.4	1.9	2.2	3.1	1.4	2.4
Total	**88.3**	**104.4**	**100.0**	**113.7**	**132.1**	**107.7**

Table 3a: Housing Starts on Greenfield Land by Area, mid2016-mid2021

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-year Avg
Kanata-Stittsville	1,266	1,366	1,393	1,657	1,271	1,391
% of Total	*32.6%*	*35.2%*	*40.6%*	*38.1%*	*24.8%*	*34.7%*
South Nepean	730	736	485	822	1,108	776
% of Total	*31.2%*	*18.9%*	*14.1%*	*18.9%*	*21.6%*	*19.4%*
Riverside South	291	514	285	455	639	437
% of Total	*5.9%*	*13.2%*	*8.3%*	*10.5%*	*12.5%*	*10.9%*
Leitrim	170	292	440	615	823	468
% of Total	*5.0%*	*7.5%*	*12.8%*	*14.1%*	*16.0%*	*11.7%*
Orléans	780	977	830	804	1,290	936
% of Total	*25.3%*	*25.1%*	*24.2%*	*18.5%*	*25.1%*	*23.4%*
Total	**3,237**	**3,885**	**3,433**	**4,353**	**5,131**	**4,008**

Table 3b: Greenfield Land Consumption of Housing Starts by Area, mid2016-mid2021 (net residential hectares)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-year Avg
Kanata-Stittsville	34.1	39.6	42.6	41.6	33.2	38.2
% of Total	*38.6%*	*37.9%*	*42.6%*	*36.5%*	*25.1%*	*35.5%*
South Nepean	19.7	18.7	12.3	19.7	27.2	19.5
% of Total	*22.3%*	*17.9%*	*12.3%*	*17.3%*	*20.6%*	*18.1%*
Riverside South	9.9	15.4	10.6	13.7	18.3	13.6
% of Total	*11.2%*	*14.7%*	*10.6%*	*12.0%*	*13.8%*	*12.6%*
Leitrim	5.3	8.5	12.9	17.9	23.8	13.7
% of Total	*6.0%*	*8.1%*	*12.9%*	*15.8%*	*18.0%*	*12.7%*
Orléans	19.3	22.3	21.6	20.9	29.6	22.7
% of Total	*21.9%*	*21.4%*	*21.6%*	*18.3%*	*22.4%*	*21.1%*
Total	**88.3**	**104.4**	**100.0**	**113.7**	**132.1**	**107.7**

Table 4: Built Densities on Greenfield Parcels, mid2016-mid2021 (units per net residential hectare)

Unit Type	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average*
Single-detached	26.1	25.2	25.8	26.7	27.1	26.2
Semi-detached	34.1	38.7	35.5	31.6	29.6	33.6
Townhouse	52.9	48.8	47.7	49.7	49.2	49.5
Stacked Townhouse	60.5	74.2	80.0	79.6	70.7	70.7
Apartment	59.5	161.1	68.8	103.0	182.3	103.2
Weighted Average	**36.7**	**37.2**	**34.3**	**38.3**	**38.9**	**37.2**

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

Table 5a: Greenfield Single-Detached Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average
Kanata-Stittsville	26.6	25.3	25.1	25.3	24.8	25.4
South Nepean	27.3	26.5	27.2	30.3	31.2	28.9
Riverside South	22.2	21.9	22.4	23.9	25.1	23.1
Leitrim	22.3	23.8	24.7	25.3	25.6	24.8
Orléans	26.7	26.5	29.8	28.6	27.7	27.9
Weighted Average	**26.1**	**25.2**	**25.8**	**26.8**	**27.1**	**26.2**

Table 5b: Greenfield Semi-Detached Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average
Kanata-Stittsville	45.0	42.5	37.6	31.0	32.4	37.6
South Nepean	30.5	36.8	34.3	24.0	25.3	30.8
Riverside South	-	43.3	-	-	34.6	35.3
Leitrim	0.0	35.1	36.810	44.4	28.5	31.1
Orléans	27.9	24.6	32.5	36.6	27.6	30.0
Weighted Average	**34.0**	**38.7**	**35.4**	**31.7**	**29.6**	**33.6**

Table 5c: Greenfield Townhouse Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average
Kanata-Stittsville	54.0	48.9	47.5	49.6	50.9	49.7
South Nepean	58.8	51.5	52.4	63.6	56.3	56.5
Riverside South	39.7	44.8	38.2	42.2	41.6	42.1
Leitrim	44.8	47.4	45.7	45.2	45.4	45.6
Orléans	57.1	50.2	47.8	49.4	52.7	51.4
Weighted Average	**52.9**	**48.8**	**47.7**	**49.7**	**49.2**	**49.5**

Table 5d: Greenfield Stacked Townhouse Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average
Kanata-Stittsville	64.7	75.9	79.1	69.0	70.3	71.1
South Nepean	63.2	64.8	-	-	76.590	70.8
Riverside South	-	76.4	-	-	64.000	67.7
Leitrim	-	-	-	-	-	0.0
Orléans	55.7	-	-	83.6	72.6	71.4
Weighted Average	**60.5**	**74.0**	**79.1**	**79.5**	**70.7**	**70.6**

Table 5e: Greenfield Apartment Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average
Kanata-Stittsville	73.7	64.5	58.3	113.9	118.1	89.9
South Nepean	-	390.6	80.0	80.0	0.0	153.0
Riverside South	-	-	93.0	81.0	0.0	86.5
Leitrim	-	88.740	47.330	-	-	52.7
Orléans	36.7	177.1	82.180	-	262.350	126.1
Weighted Average	**59.5**	**161.3**	**68.9**	**103.0**	**182.3**	**103.2**

Table 6: Greenfield Development Densities (all unit types), mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average
Kanata-Stittsville	37.1	34.5	32.7	39.9	38.3	36.4
South Nepean	37.0	39.4	39.5	41.7	40.7	39.8
Riverside South	29.5	33.4	26.8	33.3	35.0	32.2
Leitrim	32.0	34.4	34.1	34.3	34.6	34.2
Orléans	40.4	43.8	38.5	38.6	43.6	41.2
Weighted Average	**36.7**	**37.2**	**34.3**	**38.3**	**38.9**	**37.2**

Table 7: Greenfield Residential Land Supply and Unit Potential by Development Status and Area, Mid 2021

	Development Status											
	Registered		Draft Approved		Pending		CDP		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***	***Land Supply net ha***	***Unit Potential***
Kanata-Stittsville	139.49	4,954	106.35	3,959	190.43	10,029	50.48	1,165	39.77	1,475	526.52	21,582
South Nepean	13.54	778	55.95	3,849	57.94	2,623	33.46	2,230	2.45	122	163.34	9,602
Riverside South	22.58	938	103.32	4,283	75.90	2,430	244.48	10,544	0.00	0	446.28	18,195
Leitrim	49.46	1,578	24.83	782	0.00	0	3.61	179	0.00	0	77.90	2,539
Orléans	35.33	2,378	77.36	3,583	76.17	4,507	177.97	6,426	6.46	266	373.29	17,160
Total	**260.40**	**10,626**	**367.80**	**16,456**	**400.44**	**19,589**	**510.00**	**20,544**	**48.68**	**1,863**	**1,587.33**	**69,078**

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

	Net Hectares Owned	**% of all Vacant Urban Land**
Owner Name	**Mid-2021**	**Mid-2021**
Riverside South Dev. Corp.	315.5	19.9%
Richcraft Homes	129.8	8.2%
Claridge Homes	111.9	7.0%
KNL Developments	92.7	5.8%
Minto Group	80.9	5.1%
Tamarack Homes	76.9	4.8%
CRT Developments Inc.	63.5	4.0%
Urbandale Construction	58.9	3.7%
Kizell Management Corporation	51.1	3.2%
Tartan Homes	49.8	3.1%
Total, Top 10 Owners	**1,031.2**	**65.0%**
Total Greenfield Land	**1,587.3**	**100.0%**

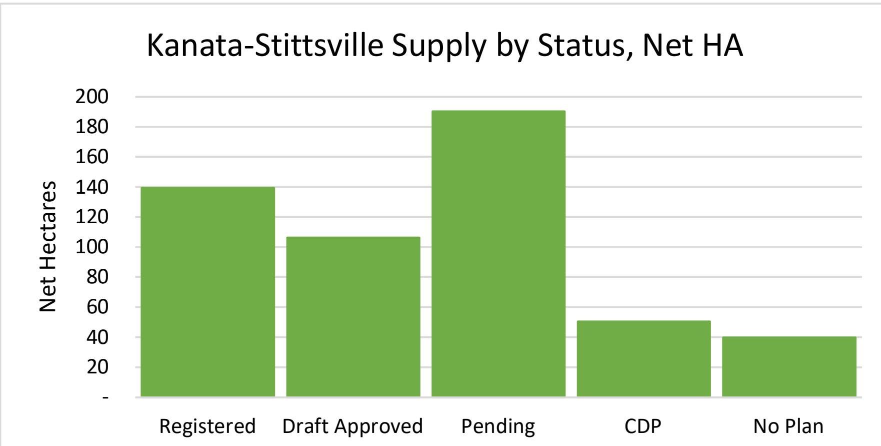
Table 9: Greenfield Residential Land Supply of Major Landowners (10 net ha and larger) by Area, Mid 2021

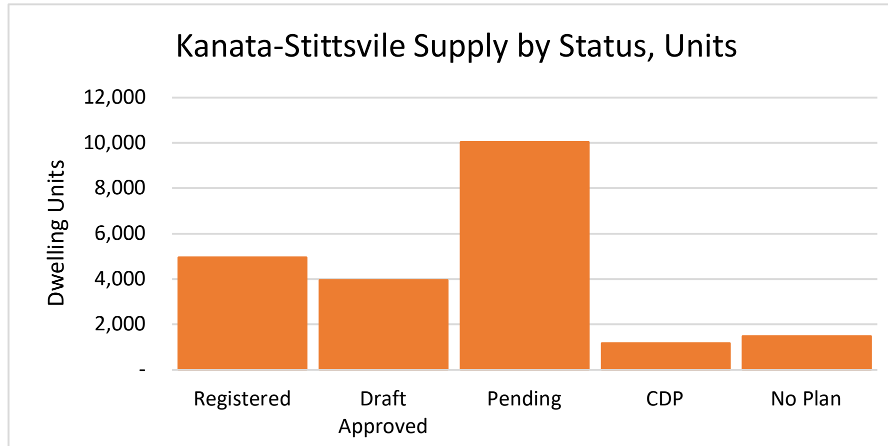
Area	Owner Name	Total (net ha)
Kanata-Stittsville	KNL Development	92.7
	CRT Developments	63.5
	Richcraft Homes	53.5
	Kizell Management Corporation	51.1
	M & A Rentals	38.2
	Minto Group	34.8
	J.G. Rivard	29.5
	Claridge and Uniform Development	23.8
	Claridge Homes	20.6
	Tartan Homes	19.1
	Urbandale Construction	13.6
	Cavanaugh/Shenkman	13.5
	Davidsons Co-Tenancy	12.4
	Cavanaugh	10.2
South Nepean	Caivan	32.1
	Minto Group	25.8
	Mattamy Homes	17.9
	1649269 Ontario Inc.	15.2
	Caivan Brazeau Developments	12.0
	Caivan Greenbank Development	11.7
Riverside South	Riverside South Development Corp.	315.5
	Urbandale Construction	39.5
	Claridge Homes	21.5
	Cardel Homes	16.2
	Mion, Lugi	14.4
	Hakim, Antoine	10.8
	2167799 Ontario Inc.	10.5
Leitrim	Tartan Homes	29.8
	Leitrim South Holdings Inc.	15.3
	Claridge Homes	13.0
	Regional Group	10.2
Orléans	Richcraft Homes	70.4
	Tamarack Homes	64.4
	Claridge Homes	50.3
	Ashcroft Homes	40.3
	Claridge Homes/Richcraft Homes	26.8
	Minto Group	20.3
	Provence Orleans Realty	14.5
	Mattamy Homes/Caivan	12.3
	Innes Road Development Corporation	11.8
	Glenview Homes	10.3
Total (net ha)		**1,409.1**

Table 10: Greenfield Residential Land Supply, Unit Potential and Approval Status, Mid 2021

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	74.80	1,503	0.34	8	56.11	2,464	2.61	156	5.63	823	-	-	139.49	4,954
Draft Approved	49.43	1,212	5.30	188	44.73	2,040	4.00	295	2.89	224	-	-	106.35	3,959
Pending	68.66	1,766	0.94	40	77.01	3,044	27.28	2,590	16.54	2,589	-	-	190.43	10,029
CDP	-	-	-	-	-	-	-	-	-	-	50.48	1,165	50.48	1,165
No Plan	-	-	-	-	-	-	-	-	-	-	39.77	1,475	39.77	1,475
TOTAL	192.89	4,481	6.58	236	177.85	7,548	33.89	3,041	25.06	3,636	90.25	2,640	526.52	21,582
% of Total	37%	21%	1%	1%	34%	35%	6%	14%	5%	17%	17%	12%	100%	100%
Density (units/hectare)	23.2		35.9		42.4		89.7		145.1		29.3		41.0	





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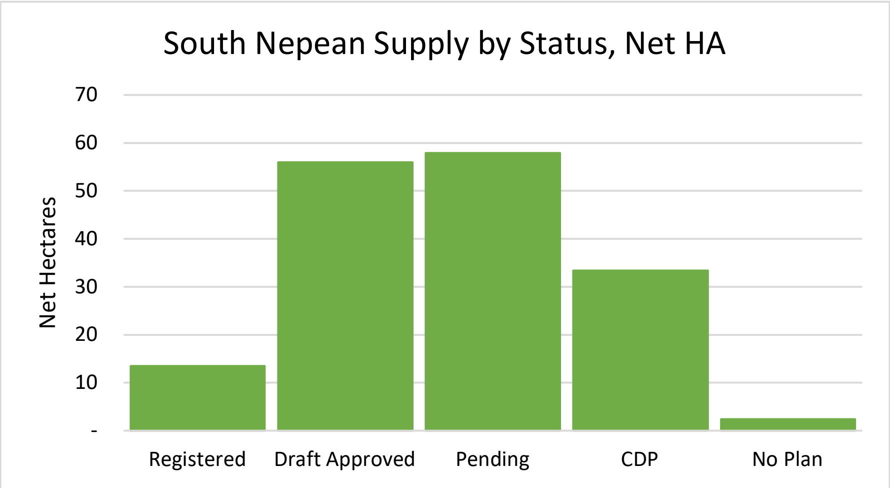
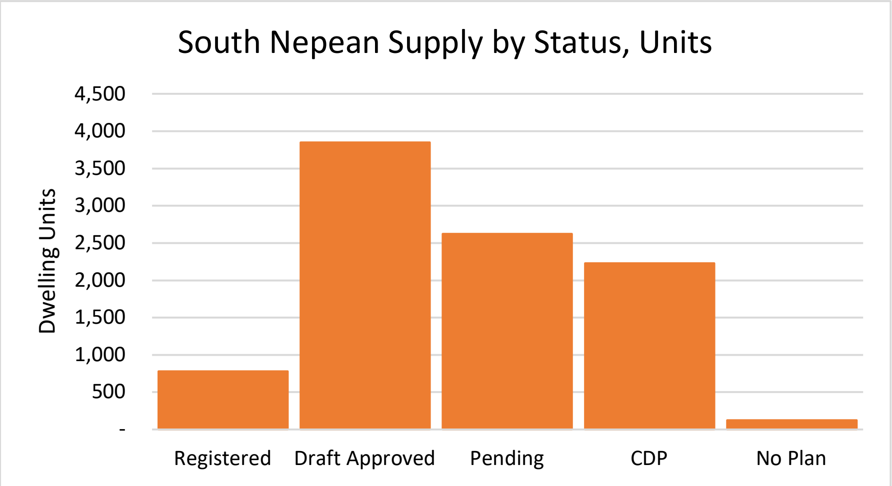
No Plan = No applications received

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	6.08	238	0.08	2	4.63	216	-	-	2.75	322	-	-	13.54	778
Draft Approved	19.44	635	-	-	26.77	1,558	4.10	368	5.64	1,288	-	-	55.95	3,849
Pending	28.64	1,045	-	-	26.09	1,432	-	-	3.21	146	-	-	57.94	2,623
CDP	-	-	-	-	-	-	0.91	96	-	-	32.55	2,134	33.46	2,230
No Plan	-	-	-	-	1.74	55	-	-	0.71	67	-	-	2.45	122
TOTAL	54.16	1,918	0.08	2	59.23	3,261	5.01	464	12.31	1,823	32.55	2,134	163.34	9,602
% of Total	33%	20%	0%	0%	36%	34%	3%	5%	8%	19%	20%	22%	100%	100%
Density (units/hectare)	35.4		25.0		55.1		92.6		148.1		65.6		58.8	





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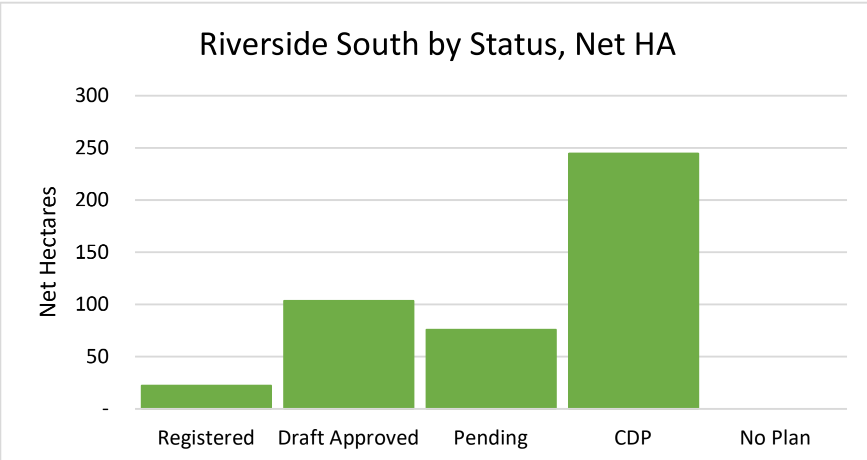
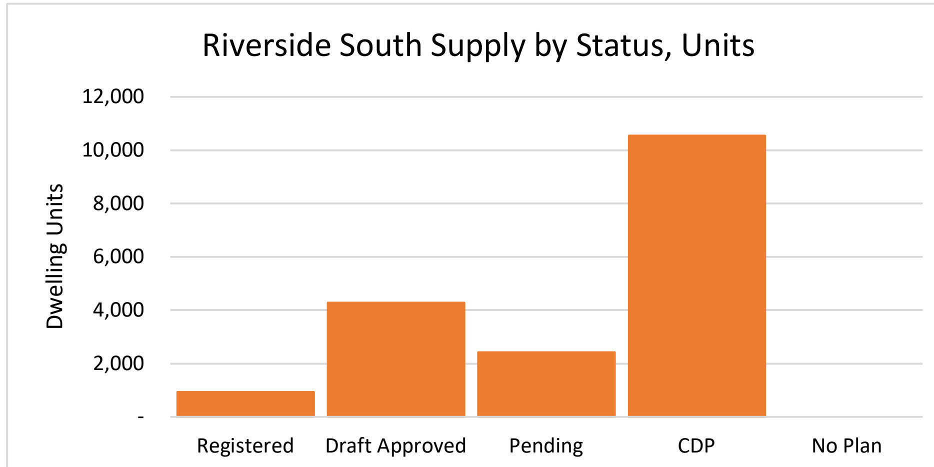
RIVERSIDE SOUTH

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	6.84	161	0.08	2	10.67	437	0.24	18	4.75	320	-	-	22.58	938
Draft Approved	35.86	839	-	-	48.92	1,842	11.09	708	7.45	894	-	-	103.32	4,283
Pending	37.13	820	0.11	2	35.04	1,396	1.60	100	2.03	112	-	-	75.90	2,430
CDP	-	-	-	-	-	-	-	-	-	-	244.48	10,544	244.48	10,544
No Plan	-	-	-	-	-	-	-	-	-	-			-	-
TOTAL	79.83	1,820	0.19	4	94.63	3,675	12.93	826	14.23	1,326	244.48	10,544	446.28	18,195
% of Total	18%	10%	0%	0%	21%	20%	3%	5%	3%	7%	55%	58%	100%	100%
Density (units/hectare)	22.8		21.1		38.8		63.9		93.2		43.1		40.8	





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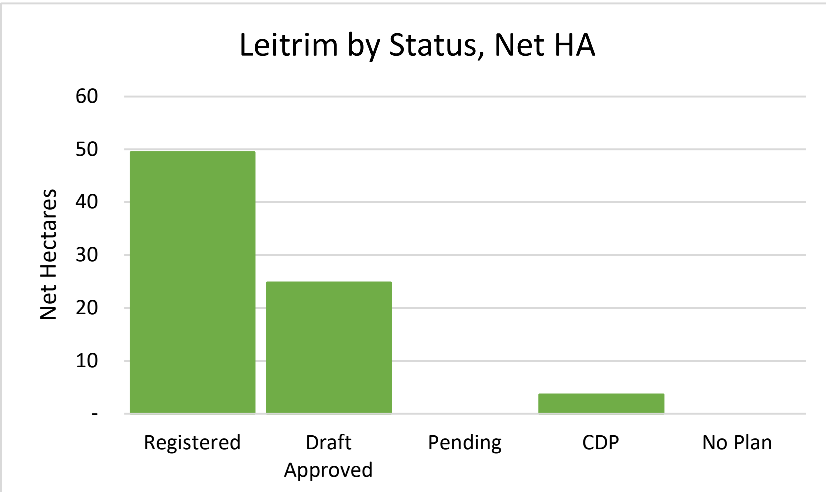
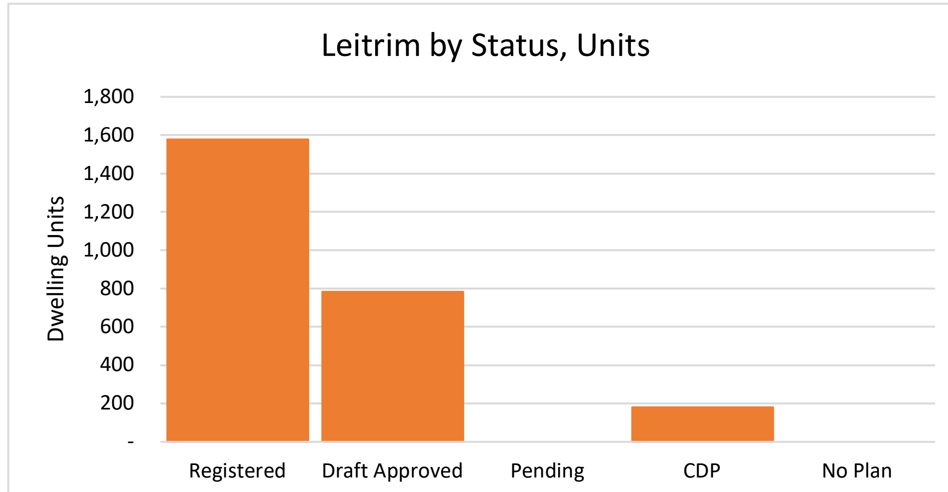
LEITRIM

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	27.34	633	0.72	26	14.18	611	-	-	7.22	308	-	-	49.46	1,578
Draft Approved	16.60	403	0.96	17	5.99	266	-	-	1.28	96	-	-	24.83	782
Pending	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CDP	-	-	-	-	-	-	-	-	-	-	3.61	179	3.61	179
No Plan	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	43.94	1,036	1.68	43	20.17	877	-	-	8.50	404	3.61	179	77.90	2,539
% of Total	56%	41%	2%	2%	26%	35%	0%	0%	11%	16%	5%	7%	100%	100%
Density (units/hectare)	23.6		25.6		43.5		#DIV/0!		47.5		49.6		32.6	





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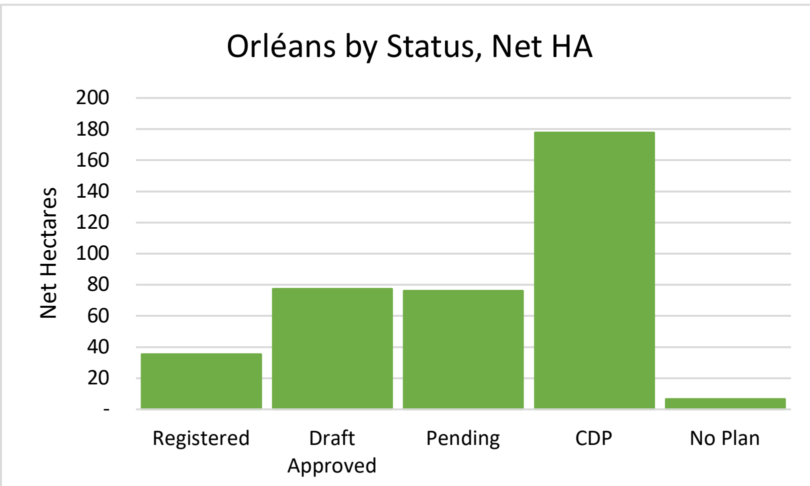
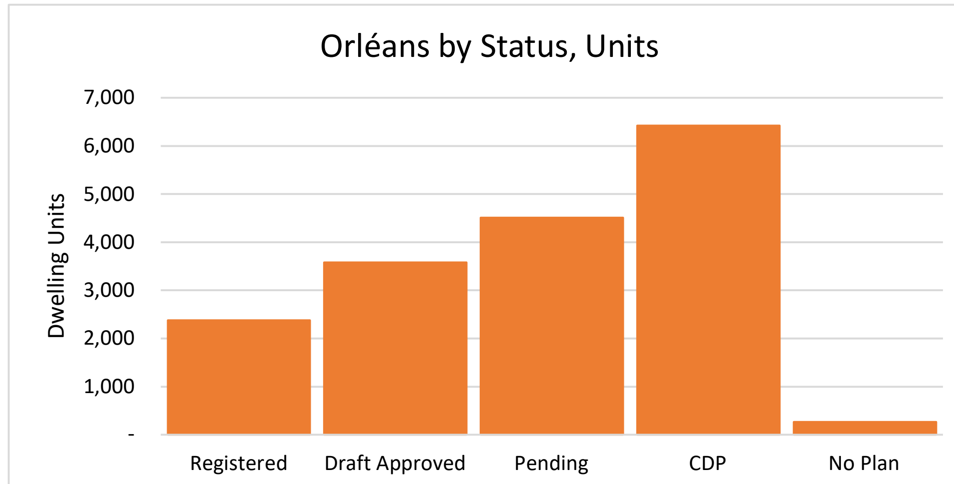
ORLÉANS

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	16.70	236	1.23	36	5.95	267	-	-	11.45	1,839	-	-	35.33	2,378
Draft Approved	37.90	1,258	2.88	112	24.30	1,272	12.28	941	-	-	-	-	77.36	3,583
Pending	27.94	778	0.54	16	30.31	1,641	3.69	344	13.69	1,728	-	-	76.17	4,507
CDP	-	-	-	-	-	-	-	-	-	-	177.97	6,426	177.97	6,426
No Plan	-	-	-	-	-	-	-	-	-	-	6.46	266	6.46	266
TOTAL	82.54	2,272	4.65	164	60.56	3,180	15.97	1,285	25.14	3,567	184.43	6,692	373.29	17,160
% of Total	22%	13%	1%	1%	16%	19%	4%	7%	7%	21%	49%	39%	100%	100%
Density (units/hectare)	27.5		35.3		52.5		80.5		141.9		36.3		46.0	





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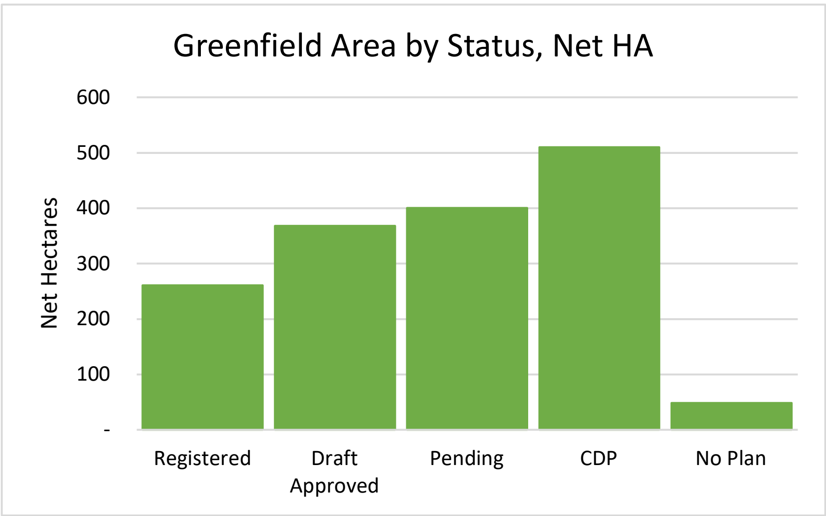
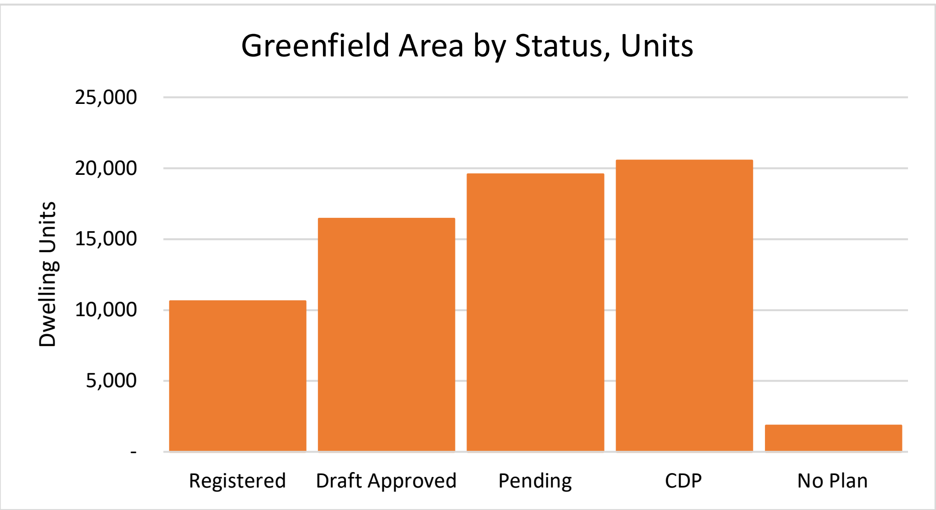
TOTAL GREENFIELD AREA

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	131.76	2,771	2.45	74	91.54	3,995	2.85	174	31.80	3,612	-	-	260.40	10,626
Draft Approved	159.23	4,347	9.14	317	150.71	6,978	31.47	2,312	17.26	2,502	-	-	367.81	16,456
Pending	162.37	4,409	1.59	58	168.45	7,513	32.57	3,034	35.47	4,575	-	-	400.44	19,589
CDP	-	-	-	-	-	-	0.91	96	-	-	509.09	20,448	510.00	20,544
No Plan	-	-	-	-	1.74	55	-	-	0.71	67	46.23	1,741	48.68	1,863
TOTAL	453.36	11,527	13.18	449	412.44	18,541	67.80	5,616	85.24	10,756	555.32	22,189	1,587.33	69,078
% of Total	29%	17%	1%	1%	26%	27%	4%	8%	5%	16%	35%	32%	100%	100%
Density (units/hectare)	25.4		34.1		45.0		82.8		126.2		40.0		43.5	





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Appendix 2: Intensification

Table 1: Intensification Housing Starts on Vacant Urban Residential Land, mid2016-mid2021

Unit Type	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	Avg. mid2016- to mid2021
Single-detached	62	11	5	7	3	18
Semi-detached	14	2	10	12	0	8
Townhouse	115	62	142	19	85	85
Stacked Townhouse	95	0	0	0	0	19
Apartment	32	387	143	646	144	270
Total	**318**	**462**	**300**	**684**	**232**	**399**

Table 2: Intensification Land Consumption of Housing Starts, mid2016-mid2021 (net residential hectares)

Unit Type	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	Avg. mid2016- to mid2021
Single-detached	2.9	0.6	0.2	0.4	0.1	0.8
Semi-detached	0.4	0.1	0.4	0.4	0.0	0.3
Townhouse	1.9	1.4	1.9	0.5	1.5	1.4
Stacked Townhouse	1.2	0.0	0.0	0.0	0.0	0.2
Apartment	0.3	3.0	1.3	2.7	1.1	1.7
Total	**6.8**	**5.0**	**3.8**	**3.9**	**2.7**	**4.5**

Table 3a: Intensification Housing Starts on Vacant Land by Area, mid2016-mid2021

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	Avg. mid2016- to mid2021
Kanata-Stittsville	60	390	43	98	232	165
% of Total	*32.6%*	*84.4%*	*14.3%*	*14.3%*	*100.0%*	*41.2%*
South Nepean	196	66	179	497	0	188
% of Total	*31.2%*	*14.3%*	*59.7%*	*72.7%*	*0.0%*	*47.0%*
Riverside South	19	0	0	0	0	4
% of Total	*5.9%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*1.0%*
Leitrim	0	0	0	0	0	0
% of Total	*5.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*
Orléans	43	6	78	89	0	43
% of Total	*25.3%*	*1.3%*	*26.0%*	*13.0%*	*0.0%*	*10.8%*
Total	**318**	**462**	**300**	**684**	**232**	**399**

Table 3b: Intensification Land Consumption of Housing Starts by Area, mid2016-mid2021 (net residential hectares)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	Avg. mid2016- to mid2021
Kanata-Stittsville	2.7	3.9	1.2	2.2	2.7	2.6
% of Total	*39.9%*	*78.2%*	*32.0%*	*55.4%*	*100.0%*	*57.3%*
South Nepean	3.0	1.0	2.0	1.0	0.0	1.4
% of Total	*44.3%*	*20.2%*	*52.0%*	*24.6%*	*0.0%*	*31.3%*
Riverside South	0.3	0.0	0.0	0.0	0.0	0.1
% of Total	*4.9%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*1.5%*
Leitrim	0.0	0.0	0.0	0.0	0.0	0.0
% of Total	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*
Orléans	0.7	0.1	0.6	0.8	0.0	0.4
% of Total	*10.9%*	*1.6%*	*16.0%*	*20.0%*	*0.0%*	*10.0%*
Total	**6.8**	**5.0**	**3.8**	**4.0**	**2.7**	**4.5**

Table 4: Intensification Built Densities on VURLS Parcels, mid2016-mid2021 (units per net residential hectare)

Unit Type	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average* mid2016- mid2021
Single-detached	21.3	19.6	20.8	18.9	22.0	20.9
Semi-detached	31.8	20.0	26.3	30.0	-	28.8
Townhouse	59.9	44.0	75.1	42.2	58.5	59.4
Stacked Townhouse	76.6	-	-	-	-	76.6
Apartment	114.3	130.3	110.0	237.5	128.6	161.1
Weighted Average	**46.8**	**91.7**	**78.7**	**173.6**	**85.6**	**89.5**

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

Table 5a: Intensification Single-Detached Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average* mid2016- mid2021
Kanata-Stittsville	20.2	19.6	20.6	18.7	22.0	20.04
South Nepean	31.5	-	-	-	-	31.5
Riverside South	15.3	-	-	-	-	15.3
Leitrim	-	-	-	-	-	-
Orléans	-	-	-	-	-	-
Weighted Average	**21.3**	**19.6**	**20.6**	**18.7**	**22.0**	**20.9**

Table 5b: Intensification Semi-Detached Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average* mid2016- mid2021
Kanata-Stittsville	27.3	20.2	26.6	30.1	-	27.4
South Nepean	40.0	-	-	-	-	40.0
Riverside South	-	-	-	-	-	-
Leitrim	-	-	-	-	-	-
Orléans	28.8	-	-	-	-	28.8
Weighted Average	**31.9**	**20.2**	**26.6**	**30.1**	-	**28.9**

Table 5c: Intensification Townhouse Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average* mid2016- mid2021
Kanata-Stittsville	43.1	39.5	47.0	42.0	58.5	48.8
South Nepean	61.6	49.1	88.1	-	-	72.4
Riverside South	-	-	-	-	-	-
Leitrim	-	-	-	-	-	-
Orléans	60.8	75.0	-	-	-	62.6
Weighted Average	**59.8**	**44.1**	**75.1**	**42.0**	**58.5**	**59.4**

Table 5d: Intensification Stacked Townhouse Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	Weighted Average* mid2016- mid2021
Kanata-Stittsville	-	-	-	-	-	-
South Nepean	71.5	-	-	-	-	71.5
Riverside South	119.5	-	-	-	-	119.5
Leitrim	-	-	-	-	-	-
Orléans	-	-	-	-	-	-
Weighted Average	**79.7**	-	-	-	-	**76.7**

Table 5e: Intensification Apartment Development Densities, mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average* mid2016- mid2021
Kanata-Stittsville	-	145.9	-	62.5	128.6	123.3
South Nepean	112.5	74.0	94.6	512.4	-	247.6
Riverside South	-	-	-	-	-	-
Leitrim	-	-	-	-	-	-
Orléans	-	-	127.9	112.7	-	119.7
Weighted Average	**112.5**	**130.2**	**110.3**	**237.7**	**128.6**	**161.1**

Table 6: Intensification Development Densities (all unit types), mid2016-mid2021 (units per net residential hectare)

Area	mid2016 - mid2017	mid2017 - mid 2018	mid2018 - mid2019	mid2019- mid2020	mid2020- mid2021	5-Year Weighted Average* mid2016- mid2021
Kanata-Stittsville	22.1	99.0	35.2	44.7	85.6	64.5
South Nepean	65.1	64.7	90.4	512.4	-	134.4
Riverside South	57.6	-	-	-	-	57.5
Leitrim	-	-	-	-	-	-
Orléans	58.1	75.0	127.9	112.7	-	97.5
Weighted Average	**46.8**	**91.7**	**78.8**	**173.4**	**85.6**	**89.5**

Table 7: Intensification parcels by area by dwelling type

	SINGLE-DETACHED		SEMI-DETACHED		TOWNHOUSE		STACKED TOWNHOUSE		APARTMENT		MIXED USE		TOTAL	
Area	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Kanata-Stittsville	1.31	31	0.63	14	3.58	156	1.63	188	12.99	2,268	3.5	128	23.64	2,785
South Nepean	2	41	1.3	34	1.13	57	1.44	124	2.45	614	0	-	8.32	870
Riverside South	0	-	0	-	0	-	0	-	0	-	0	-	0	-
Leitrim	0	-	0	-	0	-	0	-	0	-	0	-	0	-
Orleans	0	-	0	-	0.88	42	0.18	12	7.04	847	4	412	12.1	1,313
Total	3.31	72	1.93	48	5.59	255	3.25	324	22.48	3,729	7.5	540	44.06	4,968