

**Subject: Greenfield Residential Land Survey Mid-2022 Update**

**File Number: ACS2024-PRE-EDP-0002**

**Report to Planning and Housing Committee on 17 January 2024**

**Submitted on January 8, 2024 by David Wise, Director, Economic Development and Long Range Planning, Planning, Real Estate and Economic Development Department**

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**Ward: Citywide**

**Objet: Enquête sur les terrains résidentiels en zone verte – Mise à jour de la mi-2022**

**Dossier: ACS2024-PRE-EDP-0002**

**Rapport au Comité de l'urbanisme et du logement**

**le 17 janvier 2024**

**Soumis le 8 janvier 2024 par David Wise, Directeur, Développement économique et planification à long terme, Services de la planification, des biens immobiliers et du développement économique**

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**Quartier: À l'échelle de la ville**

## **REPORT RECOMMENDATION(S)**

**That Planning and Housing Committee receive this report for information.**

## **RECOMMANDATION(S) DU RAPPORT**

**Que le Comité de la planification et du logement prenne connaissance du présent rapport.**

## EXECUTIVE SUMMARY

Council adopted a new Official Plan (OP) on November 24, 2021, with a planning period from July 2018 to July 2046. The new OP divides the urban area into two categories: a “built-up area” and “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, 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, 2021 to June 30, 2022, and land supply as of July 1, 2022.

From mid-2021 to mid-2022, there were 4,258 greenfield housing starts resulting in consumption of 109.9 hectares of greenfield residential land. After the 4,258 dwelling starts were removed from the greenfield inventory and parcels were updated, as of July 1, 2022, there was approximately 1,482.2 hectares of greenfield residential land in Ottawa.

The Provincial Policy Statement (PPS) requires a 15-year supply of residential land to accommodate projected growth and a three-year supply with servicing capacity that are draft approved or registered to accommodate more immediate development. The applicable 15-year timeframe requires 1,396.5 net residential hectares, and the applicable three-year timeframe requires 279.3 net residential hectares.

As of July 1, 2022, the greenfield residential supply consisted of approximately 1,482.2 hectares. Within the greenfield supply, 1,406.6 hectares are serviced or have water and wastewater servicing capacity for residential lands and 715.5 of those hectares are either draft approved or registered. The greenfield land supply has the potential to accommodate 64,786 residential dwellings. There are sufficient lands to accommodate more than 15-years worth of growth and three-years worth of registered and draft approved dwellings, meeting the PPS requirements.

As part of the new Official Plan, Council adopted an additional 1,281 net hectares of greenfield residential land. The assumed net residential portion of the land is 50 per cent, providing 640.5 net hectares of residential land. This additional land supply brings the greenfield residential land supply total to 2,122.7 net hectares which supplements the existing supply past the planning horizon of 2046. This total does not include the Ministry added expansion parcels.

## RÉSUMÉ

Le Conseil municipal a adopté le 24 novembre 2021 un nouveau Plan officiel (PO), dont la période d'application s'étend de juillet 2018 à juillet 2046. Il divise le secteur urbain en deux catégories : la « zone bâtie » et la « zone verte ». Cette enquête sur les terrains résidentiels en zone verte vient remplacer l'ancienne Enquête sur les terrains résidentiels vacants en milieu urbain et a pour objet de surveiller le stock de terrains résidentiels disponibles dans la zone verte du secteur urbain, en date du 1<sup>er</sup> juillet 2018.

En plus de se concentrer sur les terrains de la zone verte, cette enquête voit sa période de déclaration de 12 mois passer d'une année civile habituelle à une période de mi-année à mi-année, du 1<sup>er</sup> juillet 2021 au 30 juin 2022, et le stock de terrains calculé en date du 1<sup>er</sup> juillet 2022.

De la mi-année 2021 à la mi-année 2022, on a enregistré 4 258 mises en chantier de logements en zone verte, soit l'utilisation de 109,9 hectares de terrains résidentiels en zone verte. Une fois ces 4 258 mises en chantier supprimées de l'inventaire de la zone verte et la mise à jour du nombre de parcelles effectuée, en date du 1<sup>er</sup> juillet 2022, on comptait à Ottawa environ 1 482,2 hectares de terrains résidentiels en zone verte.

La Déclaration de principes provinciale (DPP) exige un stock sur 15 ans de terrains résidentiels disponibles pour tenir compte de la croissance prévue, et un stock de trois ans de terrains viabilisés dans des plans de lotissement préliminaires ou enregistrés, en prévision des aménagements plus immédiats. Cette période de 15 ans nécessite un stock de 1 396,5 hectares résidentiels nets, et la période de trois ans nécessite 279,3 hectares résidentiels nets.

Au 1<sup>er</sup> juillet 2022, le stock de terrains résidentiels disponibles dans la zone verte était d'environ 1 482,2 hectares. De ce stock, 1 406,6 hectares sont viabilisés ou ont une capacité de traitement de l'eau et des eaux usées pour des terrains résidentiels, et 715,5 de ces hectares ont fait l'objet d'une approbation provisoire ou sont enregistrés. Le stock de terrains disponibles dans la zone verte peut accueillir 64 786 logements. Ce stock est suffisant pour une croissance sur plus de 15 ans et suffisant pour accueillir sur trois ans des logements enregistrés ou ayant fait l'objet d'une approbation provisoire, conformément aux exigences de la DPP.

Dans le cadre du nouveau Plan officiel, le Conseil a approuvé l'utilisation de 1 281 hectares nets supplémentaires de terrains résidentiels en zone verte. La proportion résidentielle nette présumée correspond à 50 pour cent, soit 640,5 hectares nets de terrains résidentiels. Ce stock supplémentaire porte la superficie de terrains résidentiels

en zone verte à 2 122,7 hectares nets, qui viennent compléter le stock actuel pour les besoins prévus au-delà de l'horizon de planification 2046. Cette superficie totale n'englobe pas les parcelles d'expansion ajoutées par le Ministère.

## **BACKGROUND**

Since 1982 the City of Ottawa has undertaken the Vacant Urban Residential Land Survey (VURLS) which monitored the supply and consumption of vacant 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.

The new Official Plan was adopted on November 24, 2021 and establishes intensification targets of 40 per cent in 2018 and increasing to 60 per cent by 2046, resulting in urban residential growth of 51 per cent through intensification within the built-up area and 49 per cent within the greenfield area. A "built-up area" as of mid-2018 was delineated in the city of Ottawa and includes areas inside the Greenbelt as well as intensification parcels in the suburban areas of Ottawa. These intensification parcels were identified in previous VURLS reports as they are located within previously developed areas at the fringe of the built-up area. Therefore, to monitor the two areas (greenfield and built-up area) separately, in mid-2021 the VURLS report changed to the Greenfield Residential Land Survey and growth within the built-up area will be monitored in the Annual Development Report on an interim basis until the new Official Plan Monitoring Report is developed.

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, 2021 to June 30, 2022, and estimates the greenfield land supply as of July 1, 2022. The tables in the appendices were also updated to a mid-year basis for the past five years to allow for an in-depth analysis of past years' consumption rates. Switching to a mid-year report allows direct comparisons/analysis to the Official Plan projections which are mid-year.

Two appendices are provided in Document 1 to help transition from the Vacant Urban Residential Land Survey to the Greenfield Residential Land Survey. Appendix 1 details the data for greenfield starts, consumption, and supply; and Appendix 2 details the data for starts, consumption, and supply of the intensification parcels in previous VURLS reports. Additionally, the maps and the parcel list include both the greenfield parcels and the intensification parcels from previous VURLS reports, which are identified by a

grey label, but 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.

## **DISCUSSION**

### **Development Trends Highlights**

From mid-2021 to mid-2022, greenfield residential land consumption totalled 109.9 hectares and produced 4,258 units, slightly higher than the five-year average of 4,212 units. The average development density surveyed is 38.8 units per net hectare, consistent with the five-year average of 37.6 units per net hectare. Of the seven CDPs tracked to compare density targets to what has been built to date, Mer Bleue had the highest development density of 38.0 units per net hectare. In mid-2022, Mer Bleue, East Urban Community, Leitrim, and Riverside South all exceeded their minimum density requirements, while Barrhaven South, Fernbank, and Cardinal Creek had lower development densities compared to their CDP requirement. As development progresses within a CDP, the built density will fluctuate, so it is important to note that the reported densities only represent a snapshot in time.

### **Land Supply Requirements**

The 2020 PPS contains policies for residential land to ensure that there is sufficient supply available for residential intensification and greenfield development. This survey focuses on the potential residential supply within the greenfield areas.

The PPS requires a 15-year supply of residential land to accommodate projected growth and a three-year supply with servicing capacity that are draft approved or registered to accommodate more immediate development. The GRLS mid-2022 update provides an inventory of greenfield residential supply as of July 1, 2022. The applicable 15-year timeframe to assess this supply would be from July 1, 2022 to June 30, 2037 and requires 1,396.5 net residential hectares, the applicable three-year timeframe would be from July 1, 2022 to June 30, 2025 and requires 279.3 net residential hectares.

As of July 1, 2022, the greenfield residential supply consisted of approximately 1,482.2 hectares. Within the greenfield supply, 1,406.6 hectares are serviced or have water and wastewater servicing capacity for residential lands and 715.5 of those hectares are either draft approved or registered. The greenfield land supply has the potential to accommodate 64,786 residential dwellings. There are sufficient greenfield lands to accommodate more than 15-years worth of growth and three-years worth of registered and draft approved dwellings.

<b>Greenfield Supply by Services, July 1, 2022</b>	
Greenfield	1,482.2 ha
Serviced lands	1,406.6 ha
Unserviced lands	75.6 ha

<b>Greenfield Supply by Services by Status, July 1, 2022</b>	
Greenfield	1,482.2 ha
Serviced lands	1,406.6 ha
Draft Approved or Registered Serviced lands	715.5ha

### **Council-adopted Urban Expansion Areas**

As part of the new Official Plan, Council adopted an additional 1,281 hectares of greenfield residential land, as seen on Map 2. The assumed net residential portion of that land is 50 per cent, providing 640.5 net hectares of residential land. The greenfield supply as of mid-2022 and the council-adopted urban expansion areas provides a projected land supply of approximately 25 years with a total unit potential of 87,836. This means the council-adopted urban expansion areas supplement the greenfield supply beyond the planning horizon of 2046, out to 2047.

<b>Greenfield Supply and Expansion Lands</b>				
	Land Supply (net ha)	Unit Potential	Projected Years Supply	Supply Until Year
Existing Designated Greenfield Supply, mid- 2022	1,482.2	64,786	15.9	
Council-adopted urban expansion areas	640.5	23,050	9.4	

<b>Total</b>	<b>2,112.7</b>	<b>87,836</b>	<b>25.3</b>	<b>2047</b>
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### **Conclusion**

Staff have reviewed the greenfield residential land supply in Ottawa and conclude it is consistent with the policies of the Provincial Policy Statement.

### **FINANCIAL IMPLICATIONS**

There are no direct financial implications with receiving this report.

### **LEGAL IMPLICATIONS**

There are no legal implications with respect to receiving this report for information.

### **COMMENTS BY THE WARD COUNCILLOR(S)**

This is a city-wide report – not applicable.

### **CONSULTATION**

This report deals with research and analysis; public consultation is not required.

### **ACCESSIBILITY IMPACTS**

As Ottawa continues to be developed, the City is committed to ensuring accessibility for persons with disabilities and older adults. All City-controlled projects follow the City of Ottawa Accessibility Design Standards and the Accessibility for Ontarians with *Disabilities Act (2005)*. The Greenfield Residential Land Survey, Mid-2022 Update report will be available in accessible format on the City website.

### **ASSET MANAGEMENT IMPLICATIONS**

There are no asset management implications associated with this report.

### **CLIMATE IMPLICATIONS**

In January 2020, Council unanimously approved the Climate Change Master Plan (CCMP), which is the overarching framework for how Ottawa will mitigate and adapt to climate change over the coming decades. It set short, mid, and long-term targets to reduce community greenhouse gas (GHG) emissions by 100 per cent by 2050 and corporate emissions by 100 per cent by 2040.

Applying a climate lens to the new Official Plan and supporting documents was one of eight priority actions within the CCMP, to be undertaken in the period 2020-2025.

Energy and Climate Change was one of six cross cutting issues identified in the plan with strategic directions that guided and helped inform the policy framework within many sections of the Plan.

For Ottawa to mitigate climate change, patterns of development must evolve to reduce energy use through greater conservation and efficiency measures. Given that 90 per cent of the city's total emissions originate from the building and transportation sectors, higher density development is directed in areas that are close to transit and within walking distance of a wide range of services, including development that is planned within greenfield areas.

Population and employment growth projections for the new Official Plan, including greenfield growth allocation targets, were integrated into the 2020 model for how Ottawa can achieve its greenhouse gas reduction targets, known as Energy Evolution. Achieving the established long-term target on emissions must also consider the actions that may have a societal cost or benefit, such as mobility and housing choices and their associated prices/costs.

To prepare for the impacts of a changing climate, the new Official Plan supports Ottawa's ability to adapt to future climate conditions by addressing the impacts of extreme heat, flood risks, using nature-based solutions for building climate resiliency and protecting our agricultural sector.

## **RISK MANAGEMENT IMPLICATIONS**

N/A

## **RURAL IMPLICATIONS**

This is a city-wide report – there are no rural implications associated with this report.

## **TERM OF COUNCIL PRIORITIES**

This project addresses the following Term of Council Priorities:

- A City that has affordable housing and is more liveable for all

## **SUPPORTING DOCUMENTATION**

Document 1 – Greenfield Residential Land Survey, Mid-2022 Update

Document 2 – Map, Mid-2022 Update

Document 3 – Parcel Listing, Mid-2022 Update



Document 4 – Map, Existing Designated Greenfield Supply and Council-adopted Urban Expansion Parcels

**DISPOSITION**

Staff to continue monitoring greenfield land supply and development patterns to ensure consistency with Provincial policies and conformity with Official Plan objectives.