

Subject: Greenfield Residential Land Survey Mid-2023 Update

File Number: ACS2025-PDB-PS-0013

Report to Planning and Housing Committee on 5 February 2025

**Submitted on January 27, 2025 by Derrick Moodie, Director, Planning Services,
Planning, Development and Building Services**

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Ward: Citywide

**Objet : Enquête sur les terrains résidentiels en zone verte – Mise à jour de la mi-
2023**

Dossier : ACS2025-PDB-PS-0013

Rapport au Comité de l'urbanisme et du logement

le 5 février 2025

**Soumis le 27 janvier 2025 par Derrick Moodie, Directeur, Services de la
planification, Direction générale des services de la planification, de
l'aménagement et du bâtiment**

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Quartier : À l'échelle de la ville

REPORT RECOMMENDATION

That Planning and Housing Committee receive this report for information.

RECOMMANDATION DU RAPPORT

Que le Comité de la planification et du logement prenne connaissance du présent rapport à titre d'information.

EXECUTIVE SUMMARY

Council adopted the Official Plan (OP) on November 24, 2021, with a planning period from July 2018 to July 2046. The 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 of the urban area, as of July 1, 2018, of the urban area. The reporting period for this report is mid-year to mid-year from July 1, 2022 to June 30, 2023, and land supply as of July 1, 2023.

From mid-2022 to mid-2023, there were 3,241 greenfield housing starts resulting in consumption of 75.1 hectares of greenfield residential land. After these starts were removed from the greenfield inventory and parcels were updated, there was approximately 1,358.1 net hectares of greenfield residential land in Ottawa as of July 1, 2023.

The Provincial Planning 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 1,329.0 net residential hectares to accommodate 49,772 dwellings, and the applicable three-year timeframe requires 265.8 net residential hectares according to Official Plan growth projections.

As of July 1, 2023, the Existing Designated Greenfield residential supply consisted of approximately 1,358.1 hectares. Within this supply, 1,282.6 hectares are serviced or have water and wastewater servicing capacity for residential lands and 646.4 of those hectares are either draft approved or registered. The greenfield land supply has the potential to accommodate 60,758 residential dwellings. There are sufficient lands to accommodate 15-years worth of growth and three-years worth of registered and draft approved dwellings, meeting the PPS requirements.

An additional 1,281 gross hectares of Future Neighbourhood parcels were added to the

urban boundary by Council during the New Official Plan process in 2021, providing approximately 640.5 net hectares of residential land. As of December 31, 2024, 1,188.2 gross hectares of these Future Neighbourhood parcels started the more detailed secondary planning process, adding approximately 594.1 net hectares of designated and available land for residential development with a unit potential of 21,388 dwellings. This added residential land supply represents a 24-year land supply and is more than sufficient to meet any potential increases in greenfield demand until the next Official Plan update that will commence in 2025.

RÉSUMÉ

Le Conseil municipal a adopté le 24 novembre 2021 le Plan officiel (PO), dont la période d'application s'étend de juillet 2018 à juillet 2046. Le nouveau PO divise le secteur urbain en deux catégories : la « zone bâtie » et la « zone verte ». Ce rapport 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 1er juillet 2018. Ce rapport est assorti d'une période de déclaration qui va de mi-année à mi-année, du 1er juillet 2022 au 30 juin 2023, et le stock de terrains calculé date du 1er juillet 2023.

De la mi-année 2022 à la mi-année 2023, on a enregistré 3 241 mises en chantier de logements en zone verte, soit l'utilisation de 75,1 hectares de terrains résidentiels en zone verte. Une fois ces mises en chantier supprimées de l'inventaire de la zone verte et la mise à jour du nombre de parcelles effectuée, on comptait à Ottawa environ 1 358,1 hectares de terrains résidentiels en zone verte, en date du 1er juillet 2023.

La Déclaration provinciale sur la planification (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 1 329,0 hectares résidentiels nets permettant la création de 49 772 logements, et la période de trois ans nécessite 265,8 hectares résidentiels nets selon les projections de croissance du Plan officiel.

En date du 1er juillet 2023, le stock de terrains résidentiels disponibles dans la zone verte était d'environ 1 358,1 hectares. De ce stock, 1 282,6 hectares sont viabilisés ou ont une capacité de traitement de l'eau et des eaux usées pour des terrains résidentiels, et 646,4 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 60

758 logements. Ce stock est suffisant pour une croissance sur 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.

Quelque 1 281 hectares résidentiels bruts supplémentaires de parcelles destinées à des quartiers projetés ont été arrimés aux limites du secteur urbain par le Conseil lors du processus de révision du Plan officiel en 2021, soit environ 640,5 hectares nets de terrains résidentiels. À partir du 31 décembre 2024, 1 188,2 hectares résidentiels bruts de ces parcelles destinées à des quartiers projetés ont fait l'objet du processus de planification secondaire plus détaillé, ajoutant environ 594,1 hectares nets de terrains désignés et disponibles pour des aménagements résidentiels, offrant un potentiel de création de 21 388 logements. Cet ajout à l'offre de terrains résidentiels suffit amplement pour répondre à l'accroissement potentiel de la demande en zones vertes jusqu'à la prochaine mise à jour du Plan officiel qui entrera en vigueur en 2025

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 Official Plan was adopted on November 24, 2021 and establishes intensification targets of 40 per cent in 2018, 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 staff will monitor intensification through a future report.

In addition to monitoring only greenfield lands, this report has a 12-month reporting period from mid-year to mid-year, being July 1, 2022, to June 30, 2023, and estimates the greenfield land supply as of July 1, 2023. Having a mid-year report allows direct comparisons/analysis to the Official Plan projections which are mid-year.

In the two appendices within this report, 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 observed housing market trends to comply with the Provincial Planning Statement.

DISCUSSION

Development Trends Highlights

From mid-2022 to mid-2023, greenfield residential land consumption totaled 75.1 hectares on which 3,241 dwellings started construction, the lowest amount in five years. The average development density surveyed was 43.2 units per net hectare, higher than the five-year average of 38.5 units per net hectare. Of the seven Community Design Plans (CDP) 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-2023, 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.

From mid-2018 to mid-2023, less dwellings started construction on greenfield lands than projected in the Official Plan. The Official Plan projected over 23,000 dwellings, averaging 4,617 annually, to occur on 629 hectares of greenfield lands. Over that same period, 20,400 housing starts, averaging 4,083 annually, occurred on 531 hectares of greenfield lands. During this period, there were 2,500 fewer housing starts and 98 fewer hectares of greenfield development than projected.

Land Supply Requirements

The 2024 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 residential supply and demand within the greenfield areas.

The PPS requires a 15-year supply of designated and available 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 15-year requirement of designated and available lands includes lands designated in the Official Plan for residential use and have commenced a secondary plan, if applicable.

The GRLS mid-2023 update provides an inventory of greenfield residential supply as of July 1, 2023. The applicable 15-year timeframe to assess this supply would be from July 1, 2023 to June 30, 2038. The current Official Plan projections are approved, in-force, and are to be used for related planning decisions, including consistency with the Provincial Planning Statement. The Official Plan greenfield projections from 2023 to 2038 requires 1,329.0 net residential hectares and the applicable three-year timeframe from July 1, 2023 to June 30, 2026 requires 265.8 net residential hectares of serviced lands.

As of July 1, 2023, the Existing Designated Greenfield residential supply consisted of 1,358.1 net hectares. Of this, 1,282.6 hectares were serviced or had water and wastewater servicing capacity for residential use and 646.4 of those hectares are either draft approved or registered.

Future Neighbourhood parcels were added to the urban boundary by Ottawa City Council during the New Official Plan process in 2021 providing an additional 1,281 gross hectares of greenfield land to the existing greenfield supply. The assumed net residential portion of that land is 50 per cent, providing 640.5 net hectares of residential land.

As of December 31, 2024, 1,188.2 gross hectares of these Future Neighbourhood parcels started their required secondary planning process and are considered designated and available under the PPS. This adds 594.1 net hectares of land designated and available for residential development to the existing designated greenfield residential supply.

Future Neighbourhood parcels represent the next phases of greenfield land supply and with the addition of those lands that have commenced their secondary plans, the total designated and available greenfield land supply is approximately 1,952.2 net hectares with a potential to accommodate 82,146 residential dwellings. Staff estimate that this provides for a 24-year supply, exceeding the 15-year supply requirement of the PPS, and is more than sufficient to meet any potential increases in greenfield demand until the next Official Plan update, particularly when less greenfield development occurred than projected in the past 5-years.

The remaining Future Neighbourhood parcels that have not started their secondary planning process will also provide an additional 46.4 net hectares of greenfield land and is estimated to accommodate greenfield development to 2048. The following tables summarize the existing designated greenfield supply and the supply with the additional of Future Neighbourhood parcels that started their secondary plans.

Existing Designated Greenfield Supply by Service and Status, July 1, 2023		Designated and Available Greenfield Supply, Year-end 2024	
Existing Designated Greenfield	1,358.1 ha	Existing Designated Greenfield	1,358.1 ha
Serviced lands	1,282.6 ha	Future Neighbourhood Secondary Plan Started	594.1 ha
Draft Approved or Registered Serviced lands	646.4 ha	Total Designated and Available	1,952.2 ha

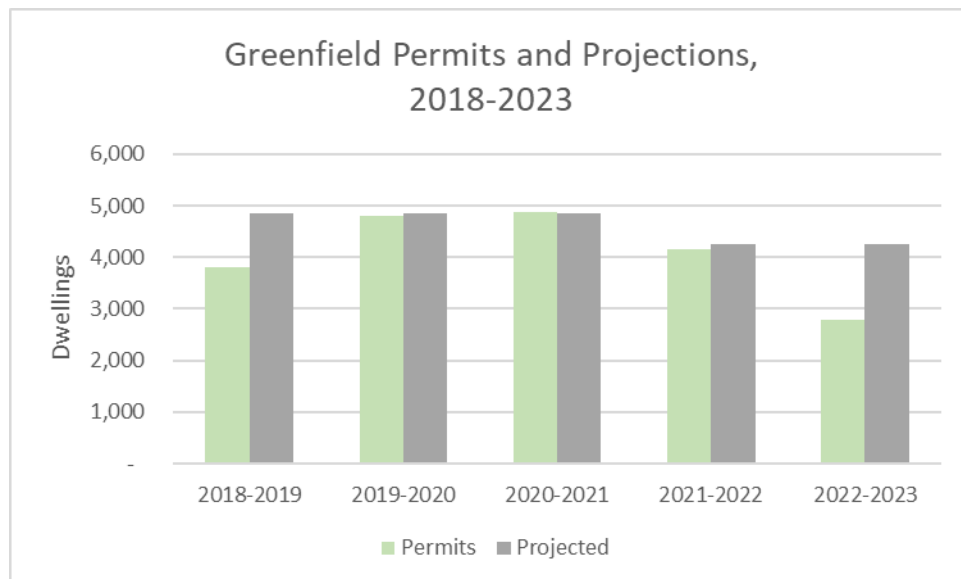
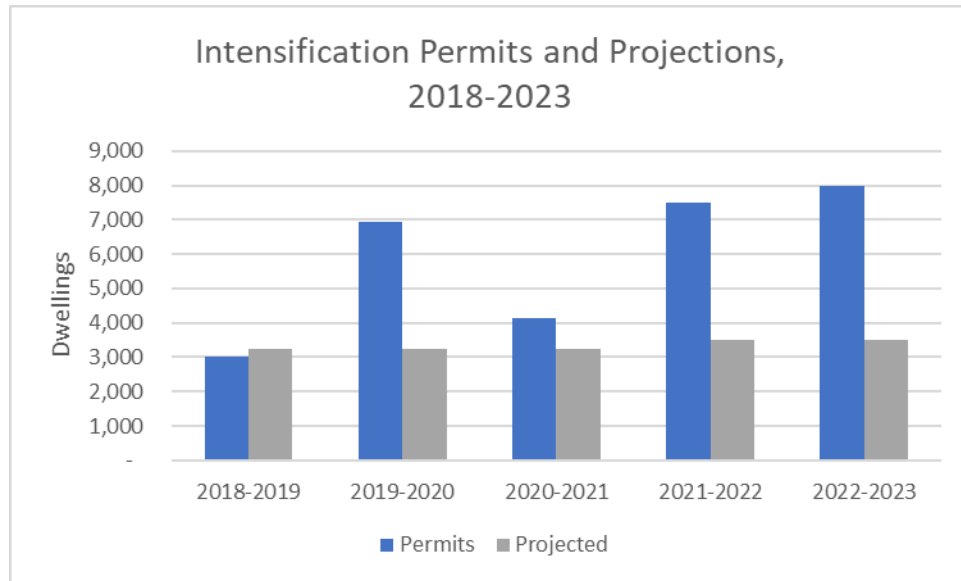
Existing Designated Greenfield Residential Supply and Future Neighbourhoods				
Category	Land Supply (net ha)	Unit Potential	Projected Years of Supply	Supply Until Year
Existing Designated Greenfield Supply, mid-2023	1,358.1	60,758	15.3	2038
Future Neighbourhood Secondary Plan Started	594.1	21,388	8.7	2047
Future Neighbourhood Secondary Plan Not Started	46.4	1,670	0.7	2048
Total	1,998.6	83,816	24.7	2048

Next Official Plan Update

On October 16, 2024 Council approved a [framework for urban and village expansion applications](#), which includes the City initiating an Official Plan growth projection update and land needs review in 2025. This update will use the population projections for the Ottawa census division that the Ministry of Finance will publish in 2025 as the basis of the housing and employment growth projections. As permitted by the PPS, these population projections may be modified as appropriate, particularly if there is a shift in immigration policy that is not reflected in the Ministry of Finance projection. This update will be the next comprehensive opportunity for Council to consider residential land need and if required, select new urban and village expansion parcels.

Housing trends over the past 5-years show that even though more housing growth occurred than projected, less housing developed on greenfield lands than projected.

2018-2023	Building Permits	OP Projection	+/- from Projections
Dwellings, urban	50,029	39,770	+10,259
Intensification	29,585	16,686	+12,899
Greenfield	20,444	23,087	- 2,643



2018-2023	Building Permits	OP Projection	+/- from Projections
Dwellings, urban	50,029	39,770	+10,259

Intensification	29,585	16,686	+12,899
Greenfield	20,444	23,087	- 2,643

Over the past five years, there were over 10,000 more dwellings that were issued building permits than projected in the Official Plan. However, this growth not only located within the built-up urban area through intensification, but 2,600 less dwellings than projected developed within the greenfield area, with those households choosing housing within the built-up urban area instead. The intensification rate for this 5-year period represents 59 per cent whereas the Official Plan targeted a minimum of 42 per cent.

Future housing growth will likely continue a similar pattern where the majority will occur within the built-up urban area rather than the greenfield area. The Official Plan update that will begin in 2025 is the appropriate process to review growth projections and for Council to consider how to manage that growth. With the direction of recent development trends and Future Neighbourhood parcels moving through the secondary planning process, there is more designated and available residential land than required by the PPS.

Conclusion

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

FINANCIAL IMPLICATIONS

There are no direct financial implications.

LEGAL IMPLICATIONS

There are no legal impediments 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-2023 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 report is limited to the urban boundary – 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-2023 Update

Document 2 – Map, Mid-2023 Update

Document 3 – Parcel Listing, Mid-2023 Update

Document 4 – Map, Existing Designated Greenfield Supply and Future Neighbourhoods

DISPOSITION

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