

**Subject: Greenfield Residential Land Survey Mid-2024 Update**

**File Number: ACS2025-PDB-PS-0056**

**Report to Planning and Housing Committee on 1 October 2025**

**and Council 8 October 2025**

**Submitted on September 19, 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-2024**

**Dossier : ACS2025-PDB-PS-0056**

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

**le 1 octobre 2025**

**et au Conseil le 8 octobre 2025**

**Soumis le 19 septembre 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 and Council receive this report for  
information.**

#### **RECOMMANDATION DU RAPPORT**

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

## EXECUTIVE SUMMARY

This report on greenfield residential land supply is based on the current Official Plan housing projections. The City has initiated an Official Plan Amendment to update the population, housing, and employment projections based on the latest population projections for Ottawa from the Ministry of Finance. Staff will assess the land supply based on the updated housing projections through the Official Plan Amendment process and a growth management strategy in March 2026.

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) monitors the residential land supply within the greenfield portion of the urban area as of July 1, 2018. The reporting period is mid-year to mid-year from July 1, 2023, to June 30, 2024, and land supply as of July 1, 2024.

From mid-2023 to mid-2024, there were 2,527 greenfield housing starts resulting in consumption of 59.2 hectares of greenfield residential land. After these starts were removed from the greenfield inventory and parcels were updated, there was approximately 1,581.8 net hectares of greenfield residential land in Ottawa as of July 1, 2024.

The Provincial Planning Statement, 2024 (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 1,267.8 net residential hectares to accommodate 47,859 dwellings, and the applicable three-year timeframe requires 253.5 net residential hectares according to Official Plan growth projections.

As of July 1, 2024, the Designated and Available Greenfield residential supply consisted of approximately 1,581.8 hectares, exceeding the 15-year supply requirement by 314.0 hectares. Within this supply, 1,210.3 hectares are serviced or have water and wastewater servicing capacity for residential lands and 619.6 of those hectares are either draft approved or registered. The greenfield land supply has the potential to accommodate 69,736 residential dwellings. There are more than sufficient lands to accommodate 15-years’ worth of growth and three-years’ worth of registered and draft approved dwellings, meeting the PPS requirements.

In 2021, 1,281 gross hectares of Future Neighbourhood parcels were added to the urban boundary by Council during the New Official Plan process, providing approximately 662.4 net hectares of residential land. As of July 1, 2025, another 633.3 gross hectares of these Future Neighbourhood parcels started the more detailed

secondary planning process, adding approximately 338.6 net hectares of designated and available land for residential development with a unit potential of 13,087 dwellings. This added residential land supply extends the existing greenfield supply to approximately 25 years and is more than sufficient to meet any potential increases in greenfield demand until the next Official Plan growth update that will commence late 2025.

## **RÉSUMÉ**

Ce rapport sur l'offre de terrains résidentiels en zone verte est fondé sur les projections de logement actuelles du Plan officiel. La Ville a amorcé une modification du Plan officiel pour mettre à jour les projections relatives à la population, au logement et à l'emploi en fonction des dernières projections démographiques pour Ottawa qu'a produites le ministère des Finances. Le personnel évaluera l'offre de terrains selon les nouvelles projections de logement dans le cadre du processus de modification du Plan officiel et une stratégie de gestion de la croissance en mars 2026.

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 a pour objet de surveiller le stock de terrains résidentiels disponibles dans la zone verte du secteur urbain, en date du 1 juillet 2018. Ce rapport est assorti d'une période de déclaration qui va de mi-année à mi-année, du 1 juillet 2023 au 30 juin 2024, et le stock de terrains calculé date du 1 juillet 2024.

De la mi-année 2023 à la mi-année 2024, on a enregistré 2 527 mises en chantier de logements en zone verte, soit l'utilisation de 59,2 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 1 581,8 hectares de terrains résidentiels en zone verte, en date du 1 juillet 2024.

La Déclaration provinciale sur la planification (DPP) de 2024 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 1 267,8 hectares résidentiels nets permettant la création de 47 859 logements, et la période de trois ans nécessite 253,5 hectares résidentiels nets selon les projections de croissance du Plan officiel.

En date du 1 juillet 2024, le stock de terrains résidentiels désignés et disponibles dans la zone verte était d'environ 1 581,8 hectares, dépassant de 314 hectares le stock requis pour une période de 15 ans. De ce stock, 1 210,3 hectares sont viabilisés ou ont

une capacité de traitement de l'eau et des eaux usées pour des terrains résidentiels, et 619,6 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 69 736 logements. Ce stock est plus que 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.

En 2021, 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, soit environ 662,4 hectares nets de terrains résidentiels. À partir du 1 juillet 2025, 633,3 hectares résidentiels bruts additionnels de ces parcelles destinées à des quartiers projetés ont fait l'objet du processus de planification secondaire plus détaillé, ajoutant environ 338,6 hectares nets de terrains désignés et disponibles pour des aménagements résidentiels, offrant un potentiel de création de 13 087 logements. Cet ajout au stock de terrains résidentiels étend le stock de terrains dans la zone verte à environ 25 ans et 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 fin 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 Planning 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 an upcoming report on residential intensification.

In addition to monitoring only greenfield lands, this report has a 12-month reporting period from mid-year to mid-year, being July 1, 2023, to June 30, 2024, and estimates

the greenfield land supply as of July 1, 2024. Having a mid-year report allows direct comparisons/analysis to the Official Plan projections which are mid-year.

Appendix 1 contains summary data for greenfield starts, land consumption, and supply. Additionally, maps and a detailed parcel list are included.

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 to comply with the Provincial Planning Statement.

## **DISCUSSION**

### **Development Trends Highlights**

From mid-2023 to mid-2024, greenfield residential land consumption totaled 59.2 hectares on which 2,527 dwellings started construction, the lowest amount in five years. The average development density surveyed was 42.7 units per net hectare, higher than the five-year average of 39.8 units per net hectare. Of the seven Community Design Plans (CDP) tracked to compare density targets to what has been built to date, Barrhaven South had the highest development density of 38.0 units per net hectare. In mid-2024, Mer Bleue, Barrhaven South, East Urban Community, Leitrim, and Riverside South all exceeded their minimum density requirements, while 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-2019 to mid-2024, fewer dwellings started construction on greenfield lands than projected in the Official Plan. The Official Plan projected over 22,500 dwellings, averaging 4,501 annually, to occur on 616.0 hectares of greenfield lands. Over that same period, 19,510 housing starts, averaging 3,902 annually, occurred on 490.0 hectares of greenfield lands, representing 80 per cent of the projected land need. During this period, there were 2,994 fewer housing starts and 126.0 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-2024 update provides an inventory of greenfield residential supply as of July 1, 2024. The applicable 15-year timeframe to assess this supply would be from July 1, 2024, to June 30, 2039. The current Official Plan projections are approved, in-force, and are to be used for related planning decisions, including consistency with the PPS. The Official Plan greenfield projections from 2024 to 2039 requires 1,267.8 net residential hectares and the applicable three-year timeframe from July 1, 2024, to June 30, 2027, requires 253.5 net residential hectares of serviced lands.

As of July 1, 2024, the Designated and Available Greenfield residential supply consisted of 1,581.8 net hectares. Of this, 1,210.3 hectares were serviced or had water and wastewater servicing capacity for residential use and 619.6 of those hectares are either draft approved or registered.

<b>Existing Designated Greenfield Supply by Service and Status, July 1, 2024</b>	
Existing Designated Greenfield	1,581.8 hectares
Serviced lands	1,210.3 hectares
Draft Approved or Registered Serviced lands	619.6 hectares

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 net residential portion of that land is based on concept plans or assumed to be approximately half, providing 662.4 net hectares of residential land.

As of July 1, 2025, another 633.3 gross hectares of these Future Neighbourhood parcels started their required secondary planning process and are considered designated and available under the PPS. This adds 338.6 net hectares of land designated and available that could accommodate at least 13,000 dwellings for future residential development to the 2024 Designated and Available Greenfield residential supply.

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

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 1,920.4 net hectares with a potential to accommodate 82,823 residential dwellings. Staff estimate that this provides an almost 25-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 five years.

The remaining Future Neighbourhood parcels that have not started their secondary planning process will also provide an additional 27.8 net hectares of greenfield land and is estimated to accommodate greenfield development to 2050. The following tables summarize the existing designated greenfield supply and the supply with the addition of Future Neighbourhood parcels that started their secondary plans.

<b>Existing Designated Greenfield Residential Supply and Future Neighbourhoods</b>				
<b>Category</b>	<b>Land Supply (net hectares)</b>	<b>Unit Potential</b>	<b>Projected Years of Supply</b>	<b>Supply Until Year</b>
Designated and Available Greenfield Supply, mid-2024	1,581.8	69,736	18.7	2043
Future Neighbourhood Secondary Plan Started	338.6	13,087	6.2	2049
Future Neighbourhood Secondary Plan Not Started	27.8	1,002	1.1	2050
<b>Total</b>	<b>1,948.3</b>	<b>83,825</b>	<b>26.0</b>	<b>2050</b>

### **Official Plan Growth Projections Update**

On June 25, 2025, Council approved the [Official Plan growth projections update work plan](#). The growth projections update is a three-step process. First, is an update to the growth projections which includes population, household, and employment projections. The Ministry of Finance population projections will be used as the basis for this update. The PPS requires using provincial guidance to develop housing and employment projections from these population projections. As of the date of this report, the Province

is consulting on a proposed update to their Projections Methodology Guideline for the development of new employment projections. While the finalization of the Province's projection methodology guideline is unknown, staff anticipate tabling the population projections and developing new housing projections for committee and Council consideration in January 2026.

Second, is a growth management strategy to determine the settlement area land requirements to accommodate the new growth projections. This report provides the existing urban greenfield residential land supply to determine how much new residential land supply may be required to accommodate the new housing projections that Council will adopt. Staff anticipate developing a new growth management strategy for committee and Council consideration in March 2026 that will identify the recommended residential land need to accommodate updated housing projections.

Third, if required, is a selection process for new settlement area lands. Staff will recommend scoring criteria as part of the growth management strategy and for the remainder of 2026 score candidate expansion parcels for committee and Council consideration in Q1 2027.

## **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 citywide 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-2024 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. Servicing of greenfield residential development is guided by the Infrastructure Master Plan, which establishes the framework for the timing, planning, design, and funding of water, wastewater and stormwater infrastructure required to support greenfield residential development.

## **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.

## **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-2024 Update

Document 2 – Map, Mid-2024 Update

Document 3 – Parcel Listing, Mid-2024 Update

Document 4 – Map, Designated and Available 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.