Vacant Urban Residential Land Survey

2008 Update

City of Ottawa
Infrastructure Services and
Community Sustainability

Planning and Growth
Management Department

Policy Development and
Urban Design Branch

October 2009
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A map and detailed parcel list are available on request from the City of Ottawa Client Service Centre at 613-580-2400. Please ask for publication #13-18.

VACANT URBAN RESIDENTIAL LAND SURVEY
2008 UPDATE

1. INTRODUCTION

Since 1982, the Vacant Urban Residential Land Survey (VURLS) has monitored the supply of vacant land in Ottawa's urban area to assess whether it meets the policies of the Official Plan and the Provincial Policy Statement[1].

2. HIGHLIGHTS

- The inventoried supply of vacant urban residential land and its unit potential stood at 2,441 net hectares (ha) and 96,100 units at the end of 2008, compared to 2,606 ha and 100,490 units in December 2007. (These figures do not include land added to the urban area by Council in June 2009 as part of the OP review.) This is sufficient for significantly more than the 10 year requirement of the *Provincial Policy Statement* (PPS) based on projected growth in the next decade.

- The supply of land serviced with trunk sewers and watermains represents a 10.4 year supply based on projected demand. This exceeds the requirement of a three year supply of serviced land set out in the PPS.

- The supply of serviced land by area is: Inside the Greenbelt 3.8 years; Kanata-Stittsville 10.4 years; South Nepean 9.9 years; Riverside South 6.8 years; Leitrim 20.9 years; and Orléans 12.9 years.

- The supply of registered and draft approved vacant land with servicing in 2008 (662 ha) represents a 5.2 year supply based on projected demand. This is virtually unchanged from 2007 (672 ha), and is above the PPS requirement for a three year supply of serviced registered and draft approved lots.

- Consumption of urban residential land in 2008 totalled 149 net ha, down from 154 ha in 2007 (Figure 1), but above the five year average of 145 ha. Dwelling units constructed on these lands totalled 5,039, up from 4,974 units in 2007 (Figure 2).

- The average density of housing built on land surveyed in 2008, at 33.9 units per net ha, was the highest recorded since the survey began monitoring in 1983. Over the last two years, the density of single detached homes was up by almost 8%. Townhouse densities were nearly 3% higher.

[1] Note: A detailed parcel list and accompanying map are also available showing unit potential, approval status and other information for individual parcels. To obtain copies, contact the City Client Service Centre at 580-2400 (refer to publication #13-18).

- Vacant land supply shares by area:
  - Kanata-Stittsville 34%
  - Riverside South 22%
  - South Nepean 18%
  - Orléans 18%
  - Leitrim 6%
  - Inside the Greenbelt 2%

- Registered and draft approved land inside the Greenbelt fell to 5% of all such land in the survey in 2008, down from 6% in 2007.

- Ten major landowners held over 70 percent of the residential land supply in 2008. Major owners were Richcraft (14.0%), Urbandale (13.0%), Minto (9.9%), Mattamy (6.1%), Monarch (5.6%), Brookfield (5.4%), Claridge (5.2%), KNL Developments (4.9%), Tartan (3.2%) and the City of Ottawa (3.0%). If partnerships are considered, Richcraft and Urbandale together account for 32% of the land supply.

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

Figure 1

Land Consumption, 1983-2008

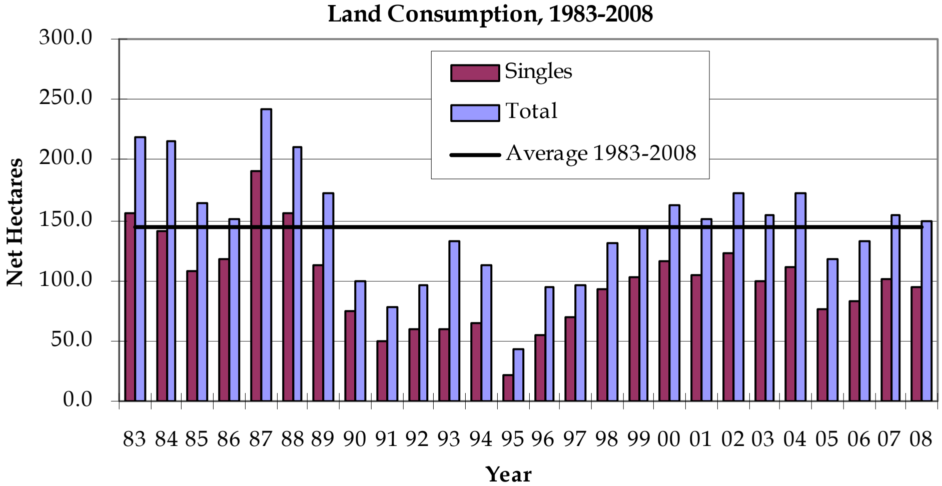
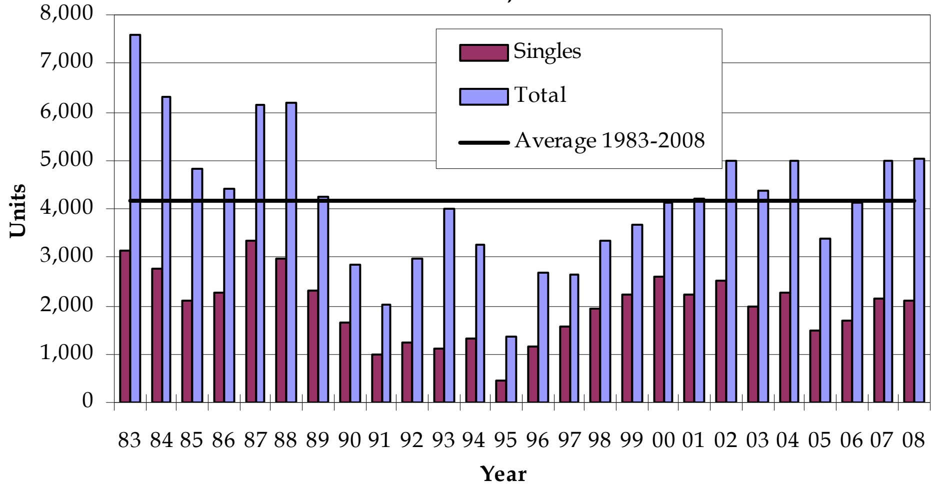


Figure 2

Unit Construction, 1983-2008



3. PURPOSE OF THE SURVEY

This report describes the vacant urban residential land supply in Ottawa and its development potential estimated in housing units. The purpose of the survey is to:

- Monitor the supply of vacant urban residential land for primarily "greenfield" development on an annual basis.
- Monitor the consumption of land and built densities by unit type and sub-area.
- Estimate unit potential by housing type and density on vacant lands in the near and medium term.
- Compare the supply of residential land with future demand.
- Assess total supply and serviced registered and draft approved supply against the Provincial Policy Statement.
- Monitor land ownership patterns by area.

4. METHODOLOGY

Lands surveyed are those designated "Urban Area" on Schedule A of the Official Plan, including amendments approved up to December 2008. Lands considered to have development potential are those parcels of vacant residential[1] land greater than 0.8 net hectares in size. Smaller parcels are included if they are remnants of subdivisions included in previous years' surveys.

Estimates of development potential generally do not include units that might be created by various forms of residential intensification, but those intensification sites that meet the criteria for inclusion in the survey are included. The 2008 survey contains several

[1] Vacant residential land in this survey includes lands approved for residential development based on the most detailed, approved planning document for the subject parcel. In order of detail, from the most specific to the most general, planning approvals range from site plans, plans of subdivision and condominium, zoning by-laws, Community Design Plans and the Ottawa Official Plan.

intensification parcels (e.g. vacant land within previously developed areas, such as Central Park, and residential land rendered vacant through demolitions, such as Lebreton Flats). In 2008, all development inside the Greenbelt was some form of intensification. (Intensification activity is now reported in the Annual Development Report based on building permit issuances.)

Land parcels in the survey are described by the following variables:

- Parcel size in net hectares (ha) to the nearest 0.01 ha (1 ha = 2.47 acres).
- Unit potential by structure type, where known.
- Average density, measured in units/net ha. Net land is the area exclusively in residential use, including lanes and parking areas internal to developments but excluding public streets, rights-of-way and all non-residential uses.
- Planning status of subdivisions (registered, draft approved, etc).
- Ownership, based on assessment data.
- Planning sub-area (Inside the Greenbelt, Kanata, Orléans, etc).

Land parcels defined on the basis of ownership are the basic units of observation. Within each parcel, land is further categorized according to subdivision approval status. Field surveys, municipal records, plans of subdivision and condominium, the Official Plan, Community Design Plans, zoning by-laws, site plans, assessment data, and land registry records are all used to compile the inventory of parcels and their characteristics.

Unless otherwise noted, housing unit types are defined as follows:

Single detached: A single dwelling unit not attached to any neighbouring unit or building (units attached by carports are classified single detached).

Semi-detached: One of two dwelling units attached to a single neighbouring unit by a vertical common wall.

Townhouse: One of three or more attached dwelling units joined side by side without having any other dwellings above or below.

Stacked Townhouse: A building designed to contain six or more dwelling units attached side by side, two units high.

Apartment: One of two or more dwelling units attached vertically and horizontally, typically with shared external access, including duplexes.

5. ANALYSIS

5.1 Land Demand

Land Consumption Trends

Residential land consumption decreased in 2008 to 148.5 ha (Table 1 and Figure 1), down 4% from 154.1 ha in 2007, but slightly higher than the 145 ha average of the last five years. Single detached units accounted for 95 ha or 64% of land consumed in 2008, down from 66% in 2007. The share of land consumed by townhouses rose slightly to 28% in 2008, although the amount of land developed remained steady at 42 ha. Land used for semi-detached units decreased, while land for stacked townhouses and apartments saw a slight increase.

Stacked townhouses were reported as a separate unit type starting in 2004 (prior to that they were grouped with townhouses). In 2008, the 776 stacked townhouse units started consumed 6.1 ha of land and were built in all areas of the city for the first time since tracking of their development started.

Table 1

Vacant Urban Residential Land Consumption, 2002-2008 (net ha)

	Year							
Unit Type	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**Avg. 2004-2008**
Single detached	122.4	100.2	111.5	75.7	82.7	100.8	95.1	93.2
Semi-detached	8.2	8.9	10.3	6.7	9.2	6.9	4.1	7.4
Townhouse	36.8	44.4	47.1	32.6	35.3	41.8	41.7	39.7
Stacked Townhouse	n/a	n/a	2.6	1.3	4.6	3.4	6.1	3.6
Apartment	4.8	1.2	0.9	0.7	1.2	1.2	1.5	1.1
Total	**172.2**	**154.7**	**172.3**	**117.0**	**133.1**	**154.1**	**148.5**	**145.0**

Table 2

Housing Starts on Vacant Urban Residential Land, 2002-2008*

	Year							
Unit Type	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**Avg. 2004-2008**
Single detached	2,501	1,971	2,272	1,496	1,695	2,151	2,097	1,942
Semi-detached	248	272	306	224	310	220	122	236
Townhouse	1,547	1,987	2,004	1,319	1,478	1,911	1,798	1,702
Stacked Townhouse	n/a	n/a	240	198	512	450	776	435
Apartments	684	155	180	145	113	242	246	185
Total	**4,980**	**4,385**	**5,002**	**3,382**	**4,108**	**4,974**	**5,039**	**4,501**

* Source: CMHC.

With a 42% share of units built, single detached units led in the type of units constructed for the fifth year in a row (Table 2). There have been more detached units constructed than any other unit type every year since 1996 with the exception of 2003 when there were 16 more townhouses. In 2008, 36% of units constructed were townhouses, 15% were stacked townhouses, five percent were apartments and two percent were semi-detached. The share of singles decreased slightly from 43% in 2007, and is well below the rate of 53% seen in 2001.

Table 3a shows the distribution of land developed in 2008, with 6% inside the Greenbelt and 94% in the urban centres.

Kanata-Stittsville, South Nepean and Orléans all increased their share of land developed in 2008 while other areas all decreased. Kanata-Stittsville led all areas with a 37% share. This was followed by South Nepean (26%) and Orléans (23%).

Between 2007 and 2008, the number of units built on land covered by the survey increased in Kanata-Stittsville, South Nepean and Riverside South while falling Inside the Greenbelt, Leitrim and Orleans (Table 3b). Kanata-Stittsville experienced the highest average annual number of units built (1,248) over the past five years.

Table 3a								
Vacant Land Developed by Area, 2002-2008 (net ha)								
Area	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**5-Year Avg. 2004-2008**
Inside Greenbelt	29.3	22.8	16.0	11.1	15.0	16.6	9.3	13.6
% of Total	*17.0%*	*14.8%*	*9.3%*	*9.5%*	*11.3%*	*10.8%*	*6.2%*	*9.4%*
Kanata-Stittsville	49.5	39.3	45.2	34.2	39.1	49.2	54.5	44.4
% of Total	*28.8%*	*25.4%*	*26.2%*	*29.2%*	*29.4%*	*32.0%*	*36.7%*	*30.7%*
South Nepean	50.8	42.8	44.0	30.1	36.1	38.1	38.9	37.4
% of Total	*29.5%*	*27.6%*	*25.5%*	*25.8%*	*27.2%*	*24.7%*	*26.2%*	*25.8%*
Riverside South	10.3	9.8	13.5	8.3	9.2	9.9	8.4	9.9
% of Total	*6.0%*	*6.3%*	*7.8%*	*7.1%*	*6.9%*	*6.5%*	*5.6%*	*6.8%*
Leitrim	-	7.6	7.3	5.5	5.5	5.5	3.7	5.5
% of Total	*-*	*4.9%*	*4.2%*	*4.7%*	*4.2%*	*3.6%*	*2.5%*	*3.8%*
Orléans	32.3	32.4	46.3	27.7	28.1	34.7	33.8	34.1
% of Total	*18.8%*	*21.0%*	*26.9%*	*23.7%*	*21.1%*	*22.5%*	*22.8%*	*23.5%*
Total	**172.2**	**154.7**	**172.3**	**117.0**	**133.1**	**154.1**	**148.5**	**145.0**
Total %	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***

Table 3b								
Units Built by Area, 2002-2008 (net ha)								
Area	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**5-Year Avg. 2004-2008**
Inside Greenbelt	1,230	956	774	489	568	918	596	669
% of Total	*24.7%*	*21.8%*	*15.5%*	*14.5%*	*13.8%*	*18.5%*	*11.8%*	*14.9%*
Kanata-Stittsville	1,334	913	1,153	765	1,060	1,474	1,790	1,248
% of Total	*26.8%*	*20.8%*	*23.1%*	*22.6%*	*25.8%*	*29.6%*	*35.5%*	*27.7%*
South Nepean	1,423	1,180	1,168	893	1,154	1,068	1,215	1,100
% of Total	*28.6%*	*26.9%*	*23.4%*	*26.4%*	*28.1%*	*21.5%*	*24.1%*	*24.4%*
Riverside South	223	235	330	224	279	290	314	287
% of Total	*4.5%*	*5.4%*	*6.6%*	*6.6%*	*6.8%*	*5.8%*	*6.2%*	*6.4%*
Leitrim	-	155	195	134	134	151	83	139
% of Total	*-*	*3.5%*	*3.9%*	*4.0%*	*3.3%*	*3.0%*	*1.6%*	*3.1%*
Orléans	770	946	1,382	877	913	1,073	1,041	1,057
% of Total	*15.5%*	*21.6%*	*27.6%*	*25.9%*	*22.2%*	*21.6%*	*20.7%*	*23.5%*
Total	**4,980**	**4,385**	**5,002**	**3,382**	**4,108**	**4,974**	**5,039**	**4,501**
Total %	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***

Source: CMHC Housing Starts

Densities

The average net density[1] of development since 2002 has ranged between approximately 28 and 34 units per net ha (Table 4). In 2008 it stood at 33.9 units per ha, the highest average density since monitoring began in 1983.

Table 4								
	Built Densities on VURLS Parcels, 2002-2008 (units per net ha)							
Unit Type	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**5-Year Weighted Average* 2004-2008**
Single detached	20.4	19.7	20.4	19.8	20.5	21.3	22.1	20.8
Semi-detached	30.3	30.7	29.9	33.4	33.6	32.1	30.1	31.9
Townhouse	42.0	44.8	42.6	40.5	41.9	45.8	43.1	42.9
Stacked townhouse	n/a	n/a	93.4	157.1	110.3	130.8	127.4	120.9
Apartment	144.1	129.2	209.3	219.7	98.3	198.4	162.9	171.5
Weighted Average	**28.9**	**28.4**	**29.0**	**28.9**	**30.9**	**32.3**	**33.9**	**29.9**

* Weighting divides the sum of units built by the sum of hectares developed

The breakdown of the annual density of development by area and unit type is provided in Tables 5 to 8 for the 2002 to 2008 period.

Table 5								
Single Detached Development Densities, 2002-2008 (units per net ha)								
Area	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**5-Year Average 2004-2008**
Inside Greenbelt	23.4	18.0	21.7	21.3	21.9	21.5	21.0	21.6
Kanata-Stittsville	17.7	18.9	18.6	18.5	19.3	22.6	22.9	20.6
South Nepean	21.2	20.7	21.3	19.6	21.3	19.9	22.2	20.9
Riverside South	19.3	19.2	20.3	19.4	19.1	20.5	22.0	20.2
Leitrim	-	17.7	18.7	17.2	17.6	17.3	17.8	17.8
Orléans	21.5	20.8	21.4	22.0	21.5	21.9	21.4	21.6
Weighted Average	**20.4**	**19.7**	**20.4**	**19.8**	**20.5**	**21.3**	**22.1**	**20.8**

The overall average density of singles increased to 22.1 units/ha in 2008 (Table 5), above the five-year average of 20.8 units/ha and the highest average since 2000 (22.3 u/ha). Densities increased in all areas except for Inside the Greenbelt and in Orléans. Leitrim had the lowest density at 17.8 u/ha.

In 2008, semi-detached units developed at an average of 30.1 units/ha. This is the lowest level of semi-detached density since 2004, when the average was 29.9 u/ha (Table 6a).

[1] Net residential density is based on the area of land in exclusively residential use, including lanes and parking areas internal to developments but excluding public streets, rights-of-way and all non-residential uses.

Table 6a								
Semi-Detached Development Densities, 2002-2008 (units per net ha)								
Area	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**5-Year Average 2004-2008**
Inside Greenbelt	34.2	37.7	36.1	32.4	38.3	35.6	28.3	34.9
Kanata-Stittsville	25.8	19.1	25.0	25.3	24.7	30.6	30.8	28.0
South Nepean	38.1	37.2	34.7	41.3	32.6	21.3	20.0	32.4
Riverside South	21.7	27.1	21.9	39.2	41.0	36.8	-	32.9
Leitrim	-	40.0	40.3	33.6	38.5	36.5	37.5	37.1
Orléans	40.0	27.5	25.1	29.8	34.8	32.2	42.9	28.6
Weighted Average	**30.3**	**30.7**	**29.9**	**33.4**	**33.7**	**32.1**	**30.1**	**31.9**

The density of townhouses in 2008 (Table 6b) dropped from 45.8 u/ha in 2007 to 43.1 u/ha in 2008. This is still higher than any townhouse development density since 2004 (42.6 u/ha). Townhouse densities decreased in all areas except South Nepean where it rose from 42.4 u/ha in 2007 to 43.0 u/ha in 2008.

Table 6b								
Townhouse Development Densities, 2002-2008 (units per net ha)								
Area	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**5-Year Average 2004-2008**
Inside Greenbelt	43.9	53.8	60.5	50.1	46.1	61.0	58.6	56.2
Kanata-Stittsville	38.3	37.5	40.4	31.7	42.8	43.0	41.8	40.3
South Nepean	43.8	42.0	39.7	44.9	39.5	42.4	43.0	41.7
Riverside South	37.6	37.2	39.4	46.2	36.3	42.0	40.8	40.7
Leitrim	-	34.5	43.1	42.3	38.5	41.5	34.8	41.3
Orléans	43.1	47.0	38.2	41.2	43.2	45.3	41.6	41.5
Weighted Average	**42.0**	**44.8**	**42.6**	**40.5**	**41.9**	**45.8**	**43.1**	**42.9**

Stacked townhouses developed at an average density of 127.4 u/ha in 2008. Densities ranged from a high of 171.4 u/ha in Leitrim to 91.5 u/ha in Riverside South (Table 6c).

Table 6c								
Stacked Townhouse Development Densities, 2002-2008 (units per net ha)								
Area	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**5-Year Average 2004-2008**
Inside Greenbelt	n/a	n/a	36.4	n/a	200.0	119.6	151.2	133.0
Kanata-Stittsville	n/a	n/a	80.0	n/a	78.8	114.3	121.5	96.2
South Nepean	n/a	n/a	126.3	146.1	113.2	164.6	120.7	128.2
Riverside South	n/a	n/a	n/a	n/a	104.0	0.0	91.5	94.1
Leitrim	n/a	n/a	n/a	n/a	0.0	0.0	171.4	171.4
Orléans	n/a	n/a	137.1	183.8	125.4	135.9	116.7	135.0
Weighted Average	**n/a**	**n/a**	**93.4**	**157.1**	**110.3**	**130.8**	**127.4**	**120.9**

Note: Monitoring of stacked townhouses began in 2004. Prior to that they were included with townhouses.

The density of apartments (Table 7) averaged 162.9 units/ha, down from 2007 and below the five-year average of 171.5 u/ha. Unlike past years, all apartment development in VURLS parcels took place outside the Greenbelt. Since the number of apartments built on surveyed parcels is relatively small, individual projects typically produce substantial variations in density from year to year.

Table 7

Apartment Development Densities, 2002-2008 (units per net ha)

Area	2002	2003	2004	2005	2006	2007	2008	5-Year Average 2004-2008
Inside Greenbelt	136.6	129.2	355.6	219.7	98.3	198.4	0.0	185.3
Kanata-Stittsville	173.9	n/a	n/a	n/a	0.0	0.0	369.4	369.4
South Nepean	105.7	n/a	n/a	n/a	0.0	0.0	0.0	0.0
Riverside South	n/a	n/a	n/a	n/a	0.0	0.0	0.0	0.0
Leitrim	n/a	n/a	n/a	n/a	0.0	0.0	0.0	0.0
Orléans	n/a	n/a	104.0	n/a	0.0	0.0	98.3	100.0
Weighted Average	**144.0**	**129.2**	**209.3**	**219.7**	**98.3**	**198.4**	**162.9**	**171.5**

In 2008, overall densities increased in every area except Leitrim and Orleans (Table 8). Compared to 2002, average overall densities in 2008 have risen 17.3 per cent.

Table 8

Total Development Densities (all unit types), 2002-2008 (units per net ha)

Area	2002	2003	2004	2005	2006	2007	2008	5-Year Average 2004-2008
Inside Greenbelt	42.0	41.9	48.3	44.0	37.8	55.4	64.3	49.2
Kanata-Stittsville	27.0	23.3	25.5	22.4	27.1	29.9	32.9	28.1
South Nepean	28.0	27.6	26.6	29.6	31.9	28.0	31.2	29.4
Riverside South	21.7	23.9	24.5	26.9	30.5	29.2	37.5	29.2
Leitrim	-	20.4	26.7	24.5	24.2	27.4	22.6	25.3
Orléans	23.8	29.2	29.8	31.6	32.5	30.9	30.8	31.0
Weighted Average	**28.9**	**28.4**	**29.0**	**28.9**	**30.9**	**32.3**	**33.9**	**31.1**

<u>10 Year Demand Projection</u>

Based on the most recent projections, new household formation is expected to create a need for 6,265 units per year over the 2009-19 period. An additional 166 units are required to provide a 3% vacancy in the rental market and to replace demolished units.

Housing requirements will be met through a combination of construction on vacant urban land, housing built in the rural area (9% of total units) and intensification in the existing urban area. A 39% allowance for intensification was assumed consistent with the targets in OPA 76 (the result of the 2009 comprehensive Official Plan review). As shown in Table 9, construction on vacant urban land is projected at close to 3,600 units annually.

Table 9		
Projected Housing Demand in Ottawa, 2009-2019*		
	10- year Requirement	Annual Requirement
To accommodate new households	62,652	6,265
To provide for 3% vacancy in the rental market	658	66
To replace demolished units (100u/yr)	1,000	100
Total Unit Requirements	**64,310**	6,431
Allowance for rural units (9%)	(5,788)	-579
Total Urban Demand	**58,522**	5,852
Allowance for intensification 39%	(22,824)	-2,282
Unit demand on Vacant Urban Residential Land	35,698	3,570
Annual unit demand on VURLS land	**3,570**	357

*Note: based on OP Amendment 76 and the Residential Land Strategy report, Feb. 2009

Combining the demand projection by unit type from Table 9 and the average density of the last five years (Table 4) results in a projected urban residential land requirement of 130 net ha per year for the 2009-2019 period, as set out in Table 9a.

Table 9a			
Annual Land Demand for Housing on VURLS Land (net ha), 2009-2019			
Type	**Units**	**Density**	**Land (ha)**
Single detached	1,934	20.8	93.0
Semi-detached	205	31.9	6.4
Townhouses	1,248	42.9	29.1
Stacked/Apartments	183	146.2	1.3
Total	**3,570**		**129.7**

Note: Stacked townhouse/apartment density is an average of the two

Note: Actual and projected housing starts on vacant land and land consumption are not strictly comparable since actual starts and land used include some intensification parcels that are excluded from the vacant land estimate. Hence, actual land consumed will be, other things being equal, slightly higher than the above estimate.

5.2 Land Supply

The supply of vacant residential land and number of units it is planned for are shown in Table 10. As of December 2008, there were 2,441 net ha of vacant residential land in the urban area of Ottawa, with a total estimated development potential of 96,100 units.

Plan Status

Table 10 shows the approval status of land parcels. Four categories are noted:

- Registered subdivision plans: final approval (building permits can be issued).
- Draft approved plans: provisional approval (subject to clearance of conditions).
- Pending applications: plan submitted but no approval given.
- No plan: no application has been submitted.

As of December 2008, 27% of the land supply was in registered and draft approved plans (9% registered, 18% draft approved). The 669 hectares in this category represent a 4.6 year supply (Table 14) based on average land consumption between 2004 and 2008. Of the remaining land, 18% had pending submissions and 55% had no plan.

Of the total, 98% of land and 93% of unit potential was located in urban areas outside the Greenbelt (Table 10). Twenty-six percent of this land was registered and draft approved.

Kanata-Stittsville accounted for 34% of the total land supply, Riverside South held 22%, South Nepean 18%, Orleans 18%, and Leitrim 6%. Areas inside the Greenbelt comprised 2% of the inventoried supply.

Table 10

Urban Residential Land Supply and Unit Potential by Development Status and Area, December 2008

	Development Status									
	Registered		**Draft Approved**		**Pending**		**No Plan**		**Total**	
Area	*Land Supply net ha*	*Unit Potential*	*Land Supply net ha*	*Unit Potential*	*Land Supply net ha*	*Unit Potential*	*Land Supply net ha*	*Unit Potential*	*Land Supply net ha*	*Unit Potential*
Inside Greenbelt	30.5	3,371	2.4	315	12.2	1,533	6.7	2,013	51.7	7,232
Kanata-Stittsville	79.5	3,879	172.1	4,944	186.7	6,324	377.9	11,730	816.1	26,877
South Nepean	40.7	1,423	79.7	2,965	85.3	3,221	242.9	17,488	448.6	25,097
Riverside South	17.6	418	0.0	0	12.4	557	516.0	16,060	546.0	17,035
Leitrim	7.2	183	90.1	3,088	17.6	568	22.8	928	137.6	4,767
Orléans	52.6	2,313	96.8	3,432	135.4	4,775	156.7	4,572	441.4	15,092
Sub-Total Outside Greenbelt	197.5	8,216	438.8	14,429	437.2	15,445	1,316.3	50,778	2,389.7	88,868
Total	**228.0**	**11,587**	**441.2**	**14,744**	**449.4**	**16,978**	**1,322.9**	**52,791**	**2,441.4**	**96,100**

Land Ownership

The holdings of the ten largest landowners in urban Ottawa (Table 11) increased to 70% of total vacant land in 2008 up from 59% in 2007 (some of the increase may be due to improved information). In 2008, the five largest landowners were Richcraft (14.0%), Urbandale (13.0%), Minto (9.9%), Mattamy (6.1%), and Monarch (5.6%). The most diversified landowner is Richcraft, with holdings throughout the city including inside the Greenbelt, Kanata-Stittsville, South Nepean, Riverside South and Orléans. Although Urbandale also holds a large share of residential land, its major holdings are concentrated in Kanata-Stittsville and Riverside South.

The effective share of land controlled by some of the major landowners in Tables 11 and 12 is understated as some jointly own large development companies. For example, KNL Developments is jointly owned by Richcraft and Urbandale. Using an even share of each would boost the shares of these two builders to about 17% and 15%, respectively.

Table 11

Share of Total Vacant Urban Land of 10 Largest Landowners, 2004-2008

	Net Hectares Owned					% of all Vacant Urban Land				
Owner Name	**2004**	**2005**	**2006**	**2007**	**2008**	**2004**	**2005**	**2006**	**2007**	**2008**
Richcraft	323.4	112.9	424.7	417.7	342.5	15.5	3.9	15.4	16.0	14.0
Urbandale	168.6	291.4	288.6	258.6	317.5	8.1	9.9	10.5	9.9	13.0
Minto	210.7	115.8	121.7	173.7	242.6	10.1	4.0	4.4	6.7	9.9
Mattamy	41.2	-	107.4	108.3	149.5	2.0	-	3.9	4.2	6.1
Monarch	-	-	55.9	73.9	135.4	-	-	2.0	2.8	5.5
Brookfield	-	155.4	132.5	132.5	132.5	-	5.3	4.8	5.1	5.4
Claridge Homes/Tenth Line	54.9	-	-	55.6	127.7	2.6	-	-	2.1	5.2
KNL Developments	121.4	120.4	120.6	120.1	119.8	5.8	4.1	4.4	4.6	4.9
Tartan	65.5	96.7	95.2	87.1	77.0	3.1	3.3	3.5	3.3	3.2
City of Ottawa	87.3	83.5	59.4	-	73.6	4.2	2.8	2.2	-	3.0
Riverside South Dev. Corp.	-	387.2	-	-	-	-	13.2	-	-	-
Shenkman	45.8	91.6	-	-	-	2.2	3.1	-	-	-
SNDC	109.1	-	-	-	-	5.2	-	-	-	-
Westpark	-	105.1	108.0	103.9	-	-	3.6	3.9	4.0	-
Total, Top 10 Owners	**1,073.0**	**976.1**	**1,406.0**	**1,427.5**	**1,718.1**	**51.4**	**33.3**	**51.1**	**54.8**	**70.4**
Total Vacant Land	**2,087.0**	**2,930.4**	**2,750.9**	**2,606.3**	**2,441.4**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Table 12 shows the ownership and planning status of major land holdings of 10 net ha or more by major area. The 22 different owners listed in the table controlled about 86% of the supply at the end of 2008, compared to 82% in 2007. Due to the difficulty of verifying ownership, readers are advised to exercise caution when interpreting these data.

Major Landowners by Area (Table 12)

Inside the Greenbelt: Of the 51.7 ha of vacant land, Claridge owned 22%.

Kanata-Stittsville: Major owners were Brookfield (16.2%), KNL (14.7%), Monarch (10.1%), and Richcraft (8.5%). These four owners controlled nearly 50% of vacant land.

South Nepean: Four owners accounted for nearly 33% of vacant land: Mattamy (26.6%), Minto (15.1%), Monarch (11.9%), and the City of Ottawa (9.2%).

Riverside South: Urbandale and Richcraft owned 51% and 30% of the supply respectively.

Leitrim: Tartan and Remer held 54% and 21% of the land supply respectively.

Orléans: Minto was the largest land owner, controlling 28.1% of total vacant land. Richcraft and Ashcroft followed with 15.1% and 9.2% respectively.

Table 12						
Residential Land Supply of Major Landowners (10 net ha and larger) by Area and Development Status, December 2008						
Area	**Owner Name**	**Registered**	**Draft-Approved**	**Pending**	**No Plan**	**Total (net ha)**
Inside Greenbelt	Claridge	0.4	-	4.7	6.3	11.3
Sub-Total, Inside Greenbelt		***0.4***	***-***	***4.7***	***6.3***	***11.3***
Kanata-Stittsville	Brookfield	-	-	-	132.5	132.5
	Klondike Dev., DCR Phoenix - 561650 Ont. Inc.	12.4	-	1.9	-	14.3
	Del	-		-	59.6	59.6
	Hope, Lloyd	-	-	-	34.7	34.7
	Kanata Road Inc./Regional Group	-	12.5	24.4	-	36.9
	KNL Developments	0.4	119.4	-	-	119.8
	Mattamy Dev. Co.	4.4	-	25.9	-	30.3
	Minto (West Kanata Development)	4.4	1.9	43.2	1.0	50.4
	Monarch	-	-	1.8	80.3	82.1
	Richcraft	10.2	-	29.1	30.4	69.7
	Tamarack	-	-	14.7	-	14.7
	Tenth Line Developments/Claridge	9.3	20.4	5.7	-	35.4
	Urbandale	17.9	4.8	20.8	-	43.5
South Nepean	1150274 Ontario Inc. (Mattamy Dev. Co.)	10.9	-	22.1	86.1	119.1
	841164 Ontario Inc. (Monarch Construction)	5.9	13.6	29.8	4.0	53.3
	City of Ottawa	-	30.7	1.7	9.0	41.4
	DCR Phoenix	9.4	-	14.0	-	23.4
	Minto	5.2	20.8	2.0	39.5	67.5
	Richcraft	1.2	-	4.9	29.9	36.0
	Taggart Corporation	-	7.3	9.1	-	16.4
	Tamarack Developments	-	-	-	31.5	31.5
Riverside South	Antoine Hakim	-	-	-	12.7	12.7
	Claridge Homes	-	-	10.8	24.8	35.6
	Ken Gordon	-	-	-	12.2	12.2
	Luigi Mion	-	-	-	11.8	11.8
	Richcraft	6.9	-	1.5	152.7	161.1
	Urbandale	10.2	-	-	268.6	278.8
Leitrim	Claridge	-	-	10.8	-	10.8
	Fred Barrett Enterprises Ltd.	-	-	-	22.8	22.8
	Remer Holdings	-	29.2	-	-	29.2
	Tartan/Findlay Creek Properties	7.2	61.0	6.8	-	74.9
Orléans	1561976 Ontario Inc. (Ashcroft)	1.6	-	3.2	35.8	40.6
	Cardinal Creek Dev., Regional Group-1048219 Ont. Inc.,Trim Rd. Inc.	3.2	-	7.7	-	10.9
	City of Ottawa	0.9	-	-	20.8	21.7
	Claridge	12.6	18.0	1.2	-	31.8
	Legault	-	1.2	-	26.6	27.8
	Minto	8.7	60.3	40.8	14.1	123.9
	Richcraft	1.2	-	65.6	-	66.8
	Taggart Corporation	5.1	8.9	-	-	13.9
Sub-Total Outside Greenbelt		***149.1***	***409.9***	***399.4***	***1,141.2***	***2,099.6***
Total (net ha)		**149.5**	**409.9**	**404.1**	**1,147.5**	**2,111.0**

Planned Density Compared with Development Density

Table 13 shows planned development density by unit type, as indicated on plans of subdivision. On lands that are registered, draft approved or pending, the planned density of singles, semi-detached and multiple units is higher than what was actually built over the last five years, while the planned density of apartments is lower.

Table 13				
Unit Potential and Density by Unit Type				
Registered, Draft-Approved and Pending Lands				
Unit Type	**Units**	**% of Grand Total**	**Hectares**	**Units/Hectare**
Single-detached	10,563	11.0	496.3	21.3
Semi-detached	1,258	1.3	36.7	34.3
Townhouses	12,655	13.2	285.5	44.3
Apartments	13,452	14.0	132.0	101.9
Sub-total	*37,928*	*39.5*	*950.5*	*39.9*
Mixed Units	5,381	5.6	168.0	32.0
Total with Plans	**43,309**	**45.1**	**1,118.5**	**38.7**
No Plan Lands				
Mixed Units	52,791	54.9	1,322.9	39.9
Grand Total	**96,100**	**100.0**	**2,441.4**	**39.4**

*Stacked townhouses are included in apartments.

5.3 2005 Provincial Policy Statement

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

- Maintain at all times the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands which are designated and available for residential development. (Policy 1.4.1a)

The 2,441 ha in the inventory at the end of 2008 exceeds the PPS requirement based on projected demand over the next decade. Based on projected demand of 130 net ha per year, the land supply would be sufficient for 19 years.

- Maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a 3 year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans. (Policy 1.4.1b)

There is a 5.2 year serviced supply of registered and draft approved lands based on projected land consumption over the next decade (Table 14). This exceeds the PPS requirement for three years of registered and draft approved land. This survey does not inventory most intensification land, so that aspect of the policy is not assessed.

Table 14			
Supply of Registered and Draft Approved Lands in December 2008, by Unit Type			
Unit Type	**Registered and Draft Approved Land (net ha)**	**Projected Annual Consumption (net ha)**	**Demand Years of Supply**
Single detached	298.0	93.0	3.2
Semi-detached	32.9	6.4	5.1
Townhouse	159.1	29.1	5.5
Apartment	91.1	1.13	80.6
Mixed*	88.0	-	n/a
Total	**669.1**	**129.7**	**5.2**

*Most of these lands will be developed for singles and townhouses.

For information, servicing for registered and draft approved lands by area is shown in Table 15. (Note that in Tables 15 and 16 demand is estimated based on past absorption rates since demand has not been projected by sub-area; as past consumption is almost 12% higher than projected, both tables understate actual supply years.) Conservatively, supply is sufficient for 2.4 years inside the Greenbelt, 5.7 years in Kanata-Stittsville, 3.2 years in South Nepean, 1.8 years in Riverside South, 17.7 years in Leitrim and 4.2 years in Orléans. Land is considered serviced if it is provided with trunk sewer and watermains with capacity available.

Table 15			
Serviced Land Supply in Registered and Draft Approved Lands in December 2008			
Area	**Serviced Land Supply (net ha)**	**Average Annual Consumption (net ha)**	**Demand Years of Supply***
Inside Greenbelt	32.8	13.6	2.4
Kanata-Stittsville	251.6	44.4	5.7
South Nepean	119.5	37.4	3.2
Riverside South	17.6	9.9	1.8
Leitrim	97.3	5.5	17.7
Orléans	142.9	34.1	4.2
Total	**661.7**	**145.0**	**4.6**

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

In December 2008, the overall supply of serviced residential land was 1,507 net ha. Table 16 shows supply by area and the estimated number of demand years based on average consumption over the last five years. The overall serviced supply remained steady at 10.4 years.

Table 16

Serviced Land Supply and Consumption by Area, December 2008

Area	Serviced Land Supply (net ha)	Average Annual Consumption (net ha)	Demand Years of Supply*
Inside the Greenbelt	52	13.6	3.8
Kanata-Stittsville	462	44.4	10.4
South Nepean	371	37.4	9.9
Riverside South	67	9.9	6.8
Leitrim	115	5.5	20.9
Orléans	441	34.1	12.9
Total	**1,507**	**145.0**	**10.4**

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

Applying the average rate of consumption for the last five years, servicing is adequate for about 3.8 years inside the Greenbelt, 10.4 years in Kanata-Stittsville, 9.9 years in South Nepean, 6.8 years in Riverside South, 20.9 years in Leitrim, and 12.9 years in Orléans. Serviced supply therefore exceeds the city-wide policy requirement for all growth areas.

6. CONCLUSION

Overall, the supply of land for new housing in Ottawa at the end of 2008 met all policies of the Provincial Policy Statement for greenfield residential land. Ottawa's vacant residential land supply of 2,441 net ha at the end of 2008 had an estimated potential for approximately 96,100 housing units. When the urban land additions provided in Official Plan Monarch Construction Amendment 76 are approved, the supply of land will be further augmented.

URBAN RESIDENTIAL LAND SUPPLY, UNIT POTENTIAL AND APPROVAL STATUS BY AREA, Dec. 2008

INSIDE THE GREENBELT

HOUSING TYPE	S		SD		TH		AP		MX		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	8.41	175	2.38	65	5.15	213	14.51	2,918	-	-	30.45	3,371
Draft Approved	-	-	-	-	-	-	2.39	315	-	-	2.39	315
Pending	2.10	55	-	-	3.87	199	6.20	1,279	-	-	12.17	1,533
No Plan	-	-	-	-	-	-	-	-	6.66	2,013	6.66	2,013
TOTAL	10.51	230	2.38	65	9.02	412	23.10	4,512	6.66	2,013	51.67	7,232
% of Total	20.3%	3.2%	4.6%	0.9%	17.5%	5.7%	44.7%	62.4%	12.9%	27.8%	100.0%	100.0%
Density (u/ha)	21.9		27.3		45.7		195.3		302.3		140.0	

KANATA-STITTSVILLE

HOUSING TYPE	S		SD		TH		AP		MX		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	34.08	708	2.23	89	27.36	1,114	14.54	1,925	1.26	43	79.47	3,879
Draft Approved	91.91	1,614	-	-	43.87	1,841	15.94	823	20.42	666	172.14	4,944
Pending	108.26	2,057	3.60	150	62.30	3,244	12.51	873	-	-	186.67	6,324
No Plan	-	-	-	-	-	-	-	-	377.85	11,730	377.85	11,730
TOTAL	234.25	4,379	5.83	239	133.53	6,199	42.99	3,621	399.53	12,439	816.13	26,877
% of Total	28.7%	16.3%	0.7%	0.9%	16.4%	23.1%	5.3%	13.5%	49.0%	46.3%	100.0%	100.0%
Density (u/ha)	18.7		41.0		46.4		84.2		31.1		32.9	

SOUTH NEPEAN

HOUSING TYPE	S		SD		TH		AP		MX		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	23.23	595	0.50	16	15.60	688	1.38	124	-	-	40.71	1,423
Draft Approved	26.01	572	8.53	308	13.28	528	11.07	832	20.84	725	79.73	2,965
Pending	39.69	1,035	-	-	28.94	1,118	7.48	790	9.14	278	85.25	3,221
No Plan	-	-	-	-	-	-	-	-	242.91	17,488	242.91	17,488
TOTAL	88.93	2,202	9.03	324	57.82	2,334	19.93	1,746	272.89	18,491	448.60	25,097
% of Total	19.8%	8.8%	2.0%	1.3%	12.9%	9.3%	4.4%	7.0%	60.8%	73.7%	100.0%	100.0%
Density (u/ha)	24.8		35.9		40.4		87.6		67.8		55.9	

RIVERSIDE SOUTH

HOUSING TYPE	S		SD		TH		AP		MX		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	13.89	265	0.05	2	3.13	127	0.50	24	-	-	17.57	418
Draft Approved	-	-	-	-	-	-	-	-	-	-	-	-
Pending	5.14	141	-	-	3.81	180	3.40	236	-	-	12.35	557
No Plan	-	-	-	-	-	-	-	-	516.04	16,060	516.04	16,060
TOTAL	19.03	406	0.05	2	6.94	307	3.90	260	516.04	16,060	545.96	17,035
% of Total	3.5%	2.4%	0.0%	0.0%	1.3%	1.8%	0.7%	1.5%	94.5%	94.3%	100.0%	100.0%
Density (u/ha)	21.3		40.0		44.2		66.7		31.1		31.2	

LEITRIM

HOUSING TYPE	S		SD		TH		AP		MX		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	5.93	112	0.16	6	0.12	5	0.94	60	-	-	7.15	183
Draft Approved	18.55	423	12.45	396	8.89	352	4.75	260	45.50	1,657	90.14	3,088
Pending	13.12	327	-	-	2.54	121	1.90	120	-	-	17.56	568
No Plan	-	-	-	-	-	-	-	-	22.76	928	22.76	928
TOTAL	37.60	862	12.61	402	11.55	478	7.59	440	68.26	2,585	137.61	4,767
% of Total	27.3%	18.1%	9.2%	8.4%	8.4%	10.0%	5.5%	9.2%	49.6%	54.2%	100.0%	100.0%
Density (u/ha)	22.9		31.9		41.4		58.0		37.9		34.6	

ORLÉANS

HOUSING TYPE	S		SD		TH		AP		MX		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	23.41	541	0.65	20	19.38	833	9.17	919	-	-	52.61	2,313
Draft Approved	52.60	1,164	5.91	198	22.33	1,025	15.92	1,045	-	-	96.76	3,432
Pending	29.92	779	0.20	8	24.93	1,067	9.44	909	70.88	2,012	135.37	4,775
No Plan	-	-	-	-	-	-	-	-	156.70	4,572	156.70	4,572
TOTAL	105.93	2,484	6.76	226	66.64	2,925	34.53	2,873	227.58	6,584	441.44	15,092
% of Total	24.0%	16.5%	1.5%	1.5%	15.1%	19.4%	7.8%	19.0%	51.6%	43.6%	100.0%	100.0%
Density (u/ha)	23.4		33.4		43.9		83.2		28.9		34.2	

TOTAL URBAN AREA

HOUSING TYPE	S		SD		TH		AP		MX		TOTAL	
	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units	net ha	units
Registered	108.95	2,396	5.97	198	70.74	2,980	41.04	5,970	1.26	43	227.96	11,587
Draft Approved	189.07	3,773	26.89	902	88.37	3,746	50.07	3,275	86.76	3,048	441.16	14,744
Pending	198.23	4,394	3.80	158	126.39	5,929	40.93	4,207	80.02	2,290	449.37	16,978
No Plan	-	-	-	-	-	-	-	-	1,322.92	52,791	1,322.92	52,791
TOTAL	496.25	10,563	36.66	1,258	285.50	12,655	132.04	13,452	1,490.96	58,172	2,441.41	96,100
% of Total	20.3%	11.0%	1.5%	1.3%	11.7%	13.2%	5.4%	14.0%	61.1%	60.5%	100.0%	100.0%
Density (u/ha)	21.3		34.3		44.3		101.9		39.0		39.4	

S = Single detached, SD = Semi-detached, TH = Townhouse, AP = Apartment, MX = Mixed