Winnipeg

Complete Communities

Land Monitoring Report

2022



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1. Executive Summary

The *Complete Communities Land Monitoring Report 2022* seeks to provide an accurate picture of recent residential and non-residential development activity and estimated land supplies to promote better policy and decision-making. As per *Complete Communities 2.0* policy, it is required to be updated annually, being critical to monitor and inform the plan's implementation. This is the inaugural report.

The report's findings were developed in consultation with industry stakeholders. More specifically, its greenfield residential inventory was refined through close collaboration with the Urban Development Institute (UDI Manitoba). Development activity and land supplies are accurate as of January 1, 2022.

In 2021, 61% of all permits issued for the construction of new residential dwelling units were located in the intensification target area. In fact, the City has exceeded *Complete Communities'* 50% target in each of the last four years. This increased level of intensification can be largely attributed to the increased development of multifamily dwelling units relative to the Conference Board of Canada forecast upon which the 50% target was based. In 2021, 66% of new residential units were accommodated in apartment dwelling types, as opposed to 25% in single-detached and 5% each in both semi-detached and rowhouse dwellings. These high rates of multifamily development have also translated into higher rates of development in Downtown, Major Redevelopment Sites, and Corridors.

The City of Winnipeg has a healthy supply of vacant greenfield residential land, with its supplies exceeding all targets in *Complete Communities 2.0*. The City has an estimated 12.5 year supply of vacant planned land (compared to its 10-year target), 8.5 years of vacant serviced land (compared to a target of five-to-seven years), and six years of vacant serviced land where the infrastructure is installed and the subdivision by-law is approved (compared to a target of three-to-five years). While it is important to maintain a healthy supply of greenfield land to accommodate forecasted housing demand, particularly for ground-oriented dwelling units that are difficult to accommodate at a large scale in infill areas, it is also important to manage against excessive supply. Doing so will help manage competing demands for limited City-funded growth-enabling and -supportive infrastructure, planning resources, and City operating costs. Given existing supplies, the timing of precinct planning processes and growth-enabling infrastructure is not immediately urgent. However, Council will need to continue to invest in these items as appropriate in order to maintain this healthy supply.

This report identifies 469 acres of unencumbered, shovel-ready vacant industrial-zoned land in the City of Winnipeg. This translates into 7.3 years of supply. Additional supply exists in sites with higher levels of constraints, including those with higher levels of encumbrances, those that may be regionally serviced but locally unserviced, those that may be designated for employment uses but not zoned, and where a reasonable amount of intensification could occur on existing occupied sites. While these supplies may seem reasonable at a glance, they fail to tell the full story. *Complete Communities 2.0* Employment Lands policies direct the City

to provide a sufficient supply to accommodate forecasted industrial growth and promote competitiveness and economic diversity. Industrial supply is highly sensitive to user preferences, who may require specific characteristics such as desired quadrant, minimum site size, direct access to major transportation corridors, etc., all of which can limit the quantity of land available to satisfy demand at a given time. To some extent, the City's existing supply may not be desirable to potential users. It is also additionally limited by the fact that much of it may not be actively marketed at a given time or held by an owner willing to sell.

This report identifies 601 acres of vacant commercial land in the City of Winnipeg, representing 21 years of supply. This supply is comprised of vacant commercial-zoned land, vacant land located in Regional Mixed Use Centres and commercial Emerging Sites whose commercial rezoning has been approved by Council but has not yet come into force, and the continued build-out of underdeveloped sites. These results affirm the continued persistence of an oversupply of commercial land first identified in the *2018 Employment and Commercial Lands Study*. This study warned of the potential consequences of such a surplus, noting that, "this surplus of commercial land will affect retail commercial intensification development opportunities in Winnipeg", and that, "it is anticipated that there will be limited market-related incentive to develop retail commercial space in multi-level or mixed-use formats in much of the City in the near term". It also warned that, "The City may wish to be cautious about making additional commercial lands available for development at this time, as an oversupply of developable land may result in commercial uses being 'cannibalized' and relocated from existing commercial areas"[1].

Additional residential and non-residential development activity trends are described throughout the report.

The report concludes by reporting on actions undertaken by the City over the past year to help achieve the intensification target. Actions fall under a number of different categories, including changes in development regulations, financial incentives, infrastructure investment, planning, and streetscaping. It also provides an update to the Greenfield Development Opportunities and Constraints table. Included in the Appendix of *Complete Communities 2.0*, it is intended to help communicate and implement greenfield phasing policies by highlighting vital information to guide future decision-making, including anticipated infrastructure investments. Only a few minor changes were made, while a wider number of items were noted for ongoing monitoring.

[1] P. 9-11-12, City of Winnipeg Employment and Commercial Lands Study, May 16, 2018.

2. Introduction

The *Complete Communities Land Monitoring Report 2022* seeks to provide an accurate picture of recent residential and non-residential development activity and estimated land supplies. In doing so, it is intended to support the implementation of *OurWinnipeg 2045*, the City's development plan, and *Complete Communities 2.0*, its citywide secondary plan guiding land use and development, as a resource to promote better policy and decision-making. It is intended to be updated annually. In particular, this report will help implement *Complete Communities'* General Growth policies, including:

- Prioritizing growth in areas that best support Complete Communities principles;
- Accommodating market demand for new housing;
- Providing for predictable development through the timely delivery of City-funded growth-enabling and growth-supportive infrastructure; and
- Optimizing existing infrastructure and services (Policy B1.1.1, General Growth).

More specifically, it is a direct response to Policy B1.5.2 (General Growth), which directs the Public Service to undertake this.

Monitor and report on development trends
5.2 (A) Report annually to Council on: a. Residential development patterns and the City's progress towards achieving the intensification target; b. Actions undertaken by the City in the previous year aimed at achieving the intensification target; c. The supply of vacant serviced and planned greenfield land; d. Changes to conditions described in the table of greenfield development opportunities and constraints contained in Appendix A; and e. Other contextual economic measures as appropriate.
5.3 Collaborate with the development industry to refine the City's understanding of its residential land supply and timing requirements.

Figure 2 -1: Section 5.2 of the General Growth section of *Complete Communities 2.0*

In providing this information, it strives to provide methodological transparency to promote greater understanding and to establish a baseline for continued discussions with the development industry and other stakeholders on how to improve.

Critical to forecasting land supplies are demand forecasts. This report relies on those that are best available. For residential housing demand, this is the most recent City of Winnipeg Population, Housing, and Economic Forecast prepared by the Conference Board of Canada in 2016. This document was created to provide a common basis to support planning initiatives across the City of Winnipeg. It projected the City to grow from 718,400 people in 2015 to

approximately 922,600 in 2040, an increase of approximately 204,200 people, or 8,200 people per year, driven primarily by international immigration. It also forecasted the number of dwelling units to increase by approximately 100,000 during this same time period, predicting reduced demand for single family dwellings and increased multi-family units.

For employment demand, this report relied on long-range employment land forecasts prepared by urbanMetrics Inc. in 2021 for the Winnipeg Metropolitan Region in support of its *Plan 20-50*, a long-term regional growth and servicing plan for the wider region. It forecasted the City of Winnipeg to accommodate between 91,000 and 125,000 new jobs from 2021 to 2051, including demand for approximately 2,000 acres of employment lands during this time period. Forecasts for warranted retail/commercial space were derived from the City's *2018 Employment and Commercial Lands Study*.

The City of Winnipeg Public Service regularly produces comprehensive economic and demographic information in its Community Trends reports, which are prepared in support of annual budget processes. These reports include data on updated population trends, residential housing and commercial markets, economic trends, and City revenue, expenditures, and debt, and should be referenced as the go-to resource on these contextual measures.

This report's inventory was prepared in consultation with industry stakeholders. The greenfield residential inventory was refined through close collaboration with the Urban Development Institute (UDI Manitoba).

The figures contained in the report represent the City's best understanding at the time of authorship. Going forward, errors may be found or refinements may be made, which may warrant changes to the data in this report. These changes will be addressed in future versions of the report. Owing to this, there may be discrepancies between this and future reports.

3. Policy Context

3.1. OurWinnipeg 2045

OurWinnipeg 2045 fulfills the Province's requirement as prescribed by Section 224 of the City of Winnipeg Charter that the City adopt a development plan by by-law to set out its long-term plans and policies respecting its purposes, its physical, social, environmental, and economic objectives, and land use and development. *OurWinnipeg* serves to align all other statutory and strategic City documents with the organization's long-term vision.

OurWinnipeg 2045's vision is to be a thriving, sustainable, and resilient city, grounded in a strong commitment for human rights, that is welcoming and contributes to an equitable and high quality of life for all. It localizes 17 United Nations Sustainable Development Goals into six goals for Winnipeg: Leadership and Good Governance, Environmental Resilience, Economic Prosperity, Good Health and Well-Being, Social Equity, and City Building.

OurWinnipeg 2045 policies in support of City land monitoring activities are described in Figure 3-1 below:

Goal	No.	Policy
Leadership and Good Governance	1.4	**Integrated Knowledge and Resources** Coordinate inter-departmental systems, projects, and resources, making the best use of internal and external expertise to better understand service needs, find the most appropriate solutions, optimize resources, and maximize community outcomes.
	1.5	**Evidence-Informed Decisions** Invest in data and technology in order to support objective, evidence-informed decision-making; support open government and open data principles for collection and sharing; help coordinate records and information management; and improve process efficiency, results-based service delivery, and accountability.
Economic Prosperity	3.5	**Strategic Enterprise Supports** Invest in employment lands servicing based on an analysis of municipal and regional supply, municipal return on investment, and future land requirements in industry sectors that are integral to achieving sustainable, local economic growth.
City Building	6.6	**Intensification Target** Achieve the intensification target by making development in intensification target areas easier and more desirable and predictable, as directed by Complete Communities.

Goal	No.	Policy
City Building	6.8	**Plan for and Accommodate Forecasted Growth** Provide for predictable development through the timely delivery of City-funded growth-enabling and growth-supportive infrastructure, within the City's financial capacity.
	6.14	**Greenfield Phasing** Provide for timely capital infrastructure and local area plans to enable and support the full build out of greenfield lands in accordance with Complete Communities greenfield phasing policies.

Figure 3-1: Applicable *OurWinnipeg 2045* policies

3.2. Complete Communities 2.0

As a city-wide secondary plan, *Complete Communities 2.0* compliments and builds on the vision established in *OurWinnipeg 2045* by guiding growth, development, and land use with a much greater level of detail. *Complete Communities 2.0* is based on an Urban Structure, which is a spatial representation of different areas of the city communicating existing characteristics and visions for future development.

Complete Communities 2.0 policies related to land monitoring activities are described in Figure 3-2 below. Specific direction for this report is provided by Policy 5.2 of the General Growth section.

Section	Policy
General Growth	**Setting an intensification target** 2.1 Aim for a minimum of 50% of all new dwelling units to be located in the intensification target area. 2.2 Aim to establish a minimum of 350 new dwelling units per year in the Downtown each year until 2030, and 500 dwelling units per year after 2030.
	Maintain vacant serviced greenfield land 4.1 Maintain a five-to-seven year supply of vacant serviced greenfield land. 4.1.1 Maintain a three-to-five year supply of vacant serviced greenfield land where all growth-enabling infrastructure is installed and the subdivision by-law is approved. 4.1.2 Consider timelines for infrastructure planning, design, and construction in managing these targets.

Section	Policy
General Growth	**Maintain planned greenfield land** 4.2 Maintain approximately a 10-year supply of planned greenfield land to support a well-functioning, competitive land market throughout the City and to manage competing demands for City local area planning resources and growth-supportive infrastructure. 4.2.1 Endeavour to provide a reasonable land supply in each quadrant of the City. 4.2.2 When allocating resources for local area planning to ensure conformance with Policy 4.2, consider the rate at which individual sites are likely to build out. 4.2.3 Consider timelines for the completion and approval of a growth-enabling secondary plan in managing this target.
	Phasing of greenfield land 4.3 Provide for timely capital infrastructure and local area plans to enable and support the full build out of greenfield lands in accordance with the greenfield phasing plan noted in Policy 4.4 and Map 3 and in accordance with Policies 4.1 and 4.2.
	Update population and housing forecasts 5.1 (A) Undertake updated long-run population and housing forecasts at least once every five years to serve as a common basis for all long-range planning activities undertaken by the City.
	Monitor and report on development trends 5.2(A) Report annually to Council on: a. Residential development patterns and the City's progress towards achieving the intensification target; b. Actions undertaken by the City in the previous year aimed at achieving the intensification target; c. The supply of vacant serviced and planned greenfield land; d. Changes to conditions described in the table of greenfield development opportunities and constraints contained in Appendix A; and e. Other contextual economic measures as appropriate. 5.3 Collaborate with the development industry to refine the City's understanding of its residential land supply and timing requirements.

Section	Policy
Commercial Areas and Mixed Use Centres	**Creating a new Regional Mixed Use Centre** 3.2.2 In addition to satisfying the criteria in Policy 1.5, require that proposals to create a new Regional Mixed Use Centre show: a. The City's overall supply of commercial lands, demand for new commercial space over the time horizon of this By-law, and the potential impact of the proposed development on the City's goals of supporting and intensifying existing commercial areas; b. How the proposed Regional Mixed Use Centre will be served by the Primary Transit Network; and Whether associated City capital expenditures will be required, determined in coordination with appropriate City departments.
	Creating a new Community Mixed Use Centre 4.2.1 In addition to satisfying the criteria in Policy 1.5, require that applications to create a new Community Mixed Use Centre show: a. The City's overall supply of commercial lands, demand for new commercial space over the time horizon of this By-law, and the potential impact of the proposed development on the City's goals of supporting and intensifying existing commercial areas; b. How the proposed Community Mixed Use Centre will be served by the Primary Transit Network; and c. Whether associated City capital expenditures will be required, determined in coordination with appropriate City departments.
Employment Lands	3.1 Provide a sufficient supply of vacant serviced Employment Lands to accommodate forecasted industrial growth, promote City and regional competitiveness and economic diversity, and to provide jobs in proximity to the City's population, amenities, and services.
	3.2 Regularly monitor the City's supply of Employment Lands and development activity. 3.2.1 (A) Develop a system to monitor the City's supply of Employment Lands. 3.2.2 (A) Endeavour to report on the City's supply of serviced vacant Employment Lands annually.
	3.3. Endeavour to maintain a five-year supply of combined vacant serviced General and Core Industrial lands.
	3.4 Provide a sufficient supply of large sites in Core Industrial areas.

Section	Policy
	Requests for conversions 4.2 Generally discourage the conversion of Employment Lands to other designations. 4.2.1 Prioritize the protection of General and Core industrial areas close to major transportation corridors such as railways, highways, and major arterial roads, as well as large industrial-zoned sites.
Capital Region	**Monitor land supply** 3.2 (A) Monitor land supply and the absorption of residential, commercial, and Employment Lands in the Capital Region.

Figure 3-2: Applicable *Complete Communities 2.0* policies

3.3. Winnipeg Metropolitan Region Draft Plan 20-50

Recent changes to Provincial legislation proposed under Bill 37, *The Planning Amendment and the City of Winnipeg Charter Amendment Act*[1], will require the City of Winnipeg to enter into a new Capital Planning Region along with the 17 other municipalities of the Winnipeg Metropolitan Region. The stated mandate of the Capital Planning Region is to enhance economic and social development by improving and coordinating sustainable land use and development in the region through a Regional Planning By-law. This plan must contain plans and policies respecting the physical, social, environmental, economic, and fiscal objectives for the Capital Planning Region over a 30-year time horizon.

In 2019, the Province of Manitoba mandated the Winnipeg Metropolitan Region (WMR) to develop this plan, and on April 9, 2021, it released the draft *Plan 20-50 Regional Growth and Servicing Plan* for public consultation. Consultation with member municipalities is currently ongoing. As it relates to this land monitoring work, the draft plan's section on Integrated Communities and Infrastructure focuses on regional growth coordination and infrastructure planning, while the Investment and Employment section speaks to Employment Land supplies.

Sections of Bill 37 establishing the Capital Planning Region have yet to be proclaimed, and *Plan 20-50* can only come into effect through adoption by the planning region. The process for adopting the plan as a Regional Planning By-law will be defined in the regulations for Bill 37. Once *Plan 20-50* comes into force, member municipalities will be required to bring their development plans into conformance.

Draft *Plan 20-50* policies speaking to the importance of this land monitoring work are described in Figure 3-3 below:

[1] 3rd session, 42nd Legislature.

Policy Area	Policy no.	Policy
Integrated Communities and Infrastructure	1.1.1	To accommodate the regional projections in Schedule 2a[1] and Schedule 2b[2], employment and population growth shall be planned in a contiguous pattern in accordance with the Winnipeg Metropolitan Regional Structure to 2050 depicted in Schedule 1[3].
	1.1.5	To optimize servicing aligned with greater density, municipalities shall meet minimum densities for greenfield area residential and mixed use developments based on the requirements of Schedule 3 (and Figure 3-4 below). Higher density targets have been identified.
Investment and Employment	2.2.1	An adequate supply of land shall be protected by municipalities to accommodate the employment projections in Schedule 2b, provide a variety of employment types, and support economic diversification. Priority employment areas shall be defined.
	2.2.2	To protect the viability of employment areas and support complete communities, the majority of employment uses shall be directed to: a) Regional Employment Areas[4] as identified in Schedule 6 and existing employment areas; b) The Metropolitan Core, Inner Metropolitan Area, Urban Centres, and Rural Centres identified in Schedule 1.

Figure 3-3: Applicable draft WMR *Plan 20-50* policies related to City land monitoring activities

[1] From an estimated 2020 population of 769,172, the Baseline forecast projects the City of Winnipeg to grow to 831,081 in 2030, 864,848 in 2040, and 860,993 in 2050, while the High-Growth forecast projects it to grow to 851,930 in 2030, 908,869 in 2040, and 927,704 in 2050.

[2] From an estimated 324,896 jobs in 2020, the Baseline forecast projects the City of Winnipeg to grow to 388,151 jobs in 2030, 410,874 in 2040, and 425,918 in 2050, while the High-Growth forecast projects it to grow to 397,789 in 2030, 431,653 in 2040, and 458,717 in 2050.

[3] Schedule 1 depicts a Regional Structure akin to OurWinnipeg's Urban Structure. It is provided in Figure 3-5 below. The plan's Metropolitan Core consists of Winnipeg's Downtown, Major Redevelopment Sites, Regional Mixed Use Centres and Corridors, and existing and future Rapid Transit Corridors. The plan's Inner Metropolitan Area includes all of the City of Winnipeg in addition to portions of West St. Paul, East St. Paul, Headingley, Macdonald, and CentrePort Canada in Rosser.

[4] Within the City of Winnipeg, Regional Employment Areas include Downtown Winnipeg and CentrePort Canada, as well as health facilities, post-secondary institutions, and Regional Mixed Use Centres.

Tier	Community	Min. residential and mixed-use density (units*/acre)	Target residential and mixed-use density (units*/acre)
Metropolitan Core	Downtown Winnipeg	50.2	149.7
	Major Redevelopment Sites and Centres along rapid transit lines	40.1	100
	Regional Mixed Use Centres and Centres along Regional Mixed Use Corridors	34.8	100
Inner Metropolitan Area	Stable Communities, including parts of the City of Winnipeg	To be considered through the City of Winnipeg's infill strategy	
	Transformative Communities, including parts of the City of Winnipeg	4.8	9.7
* - Units may include both residential and non-residential units as per 6.0 Implementation, which indicates that the WMR will develop a Density Guide for additional guidance.			

Figure 3-4: WMR draft *Plan 20-50* minimum and target densities for the City of Winnipeg

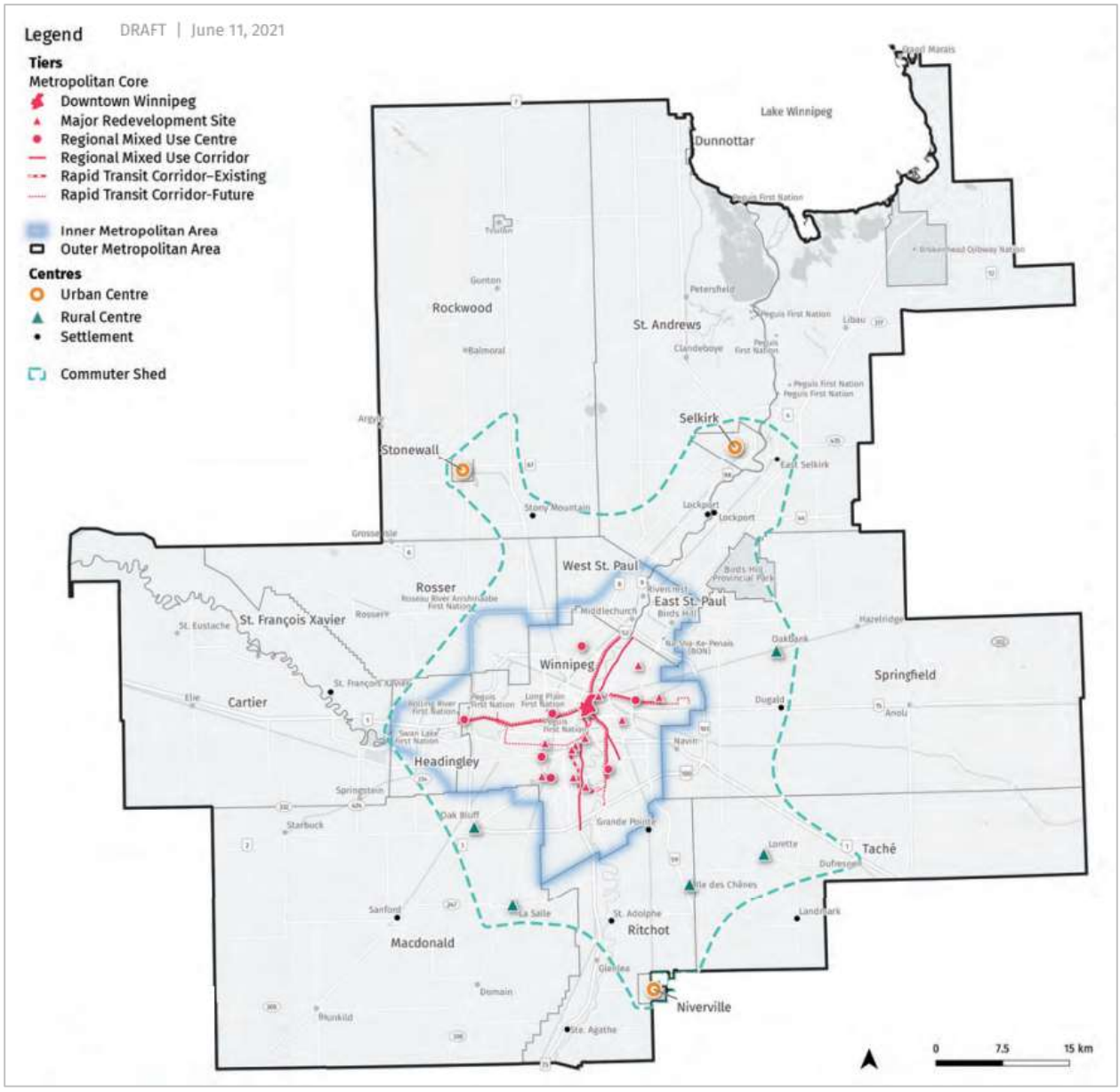

Figure 3-5: Winnipeg Metropolitan Regional Structure to 2050, draft *Plan 20-50 Regional Growth and Servicing Plan*

4.0 Methodology

4.1 Residential Methodology

4.1.1 History

The Public Service started consistently analyzing development trends and studying greenfield residential land supplies for internal purposes in 2015, which it updated annually from that point. In early 2017, it took its first steps towards formalizing these activities when it issued a contract to Hemson Consulting Ltd. to review its methodology. Hemson concluded that the City of Winnipeg's land supply monitoring methodology is consistent with methodologies applied in other comparable municipalities in Canada. It additionally offered considerations for further refinement, including distinguishing between supplies by dwelling type, and the importance of accounting for levels of municipal servicing to better understand requirements for bringing land to market.

Following third party verification of its work, the Public Service presented its findings to the Urban Development Institute (UDI) in mid-2017, following which it worked together to reconcile each other's data.

By this time, the Public Service had begun its review of *OurWinnipeg* and the *Complete Communities Direction Strategy*. In support of these initiatives, it undertook the *OurWinnipeg Residential Growth Study* to consider how the City can best accommodate forecasted growth over the next 20 years. It culminated in the preparation of site-specific growth area assessments and the evaluation of growth scenarios that directly informed development plan policies. This background study was supported by growth management consultants from IBI Group Professional Services (Canada) Inc, who offered recommendations for implementation, some of which pertained to this land monitoring work, such as:

- Coordinate land use policies and growth scenarios;
- Enhance the City's understanding of infrastructure investments needed to accommodate growth; and
- Establish a monitoring and review process for growth

With the results of the Residential Growth Study in hand, the Public Service was able to draft and advance *Complete Communities 2.0*, which introduced land supply targets and monitoring and reporting requirements. These policies are described in Section 3.2 of this report.

4.1.2 Description of Methodology

Residential land monitoring activities can be described in four main steps:

Step 1: Compile and compare data

First, all permits are extracted from the City database to January 1 of the current year, after which final permits for the construction of new residential units are sorted from the gross

permit data. Descriptions of these permits are then analyzed to assign a dwelling type consistent with Statistics Canada dwelling type definitions.

Once this dataset is established, development activity can be analyzed in accordance with the analyses provided in this report, including new residential units by Urban Structure and by intensification target.

It is important to note that, in the development of this dataset, "residential units" refer to principal dwellings. Institutional/commercial residences such as care homes, university residences, and hotels, as well as secondary suites are excluded from these figures.

Step 2: Update projected greenfield land supply

The first step in updating projected greenfield land supply entails developing or updating a forecast for every individual site using the best information available. Where applicable, approved building permits are the best source of information, followed by plans of subdivision, most notably subdivision and rezoning applications (DASZs), but also short-form subdivisions (DASSFs). Where DASZs have not yet been approved, secondary plans or Council-endorsed non-statutory area master plans would be the next best source of information. Where planning has yet to occur, an average residential density is applied based on the projected densities of active mid-build out greenfield sites.

The above forms the rationale for projecting the total number of dwelling unit types in a given site. Where the building permits have been issued by the City prescribing number of dwelling units and dwelling types, this is the most reliable basis for estimating the units that will be developed. In the absence of this information, assumptions must be made based on parcel zoning as prescribed by a DASZ. It is assumed that properties zoned "RMF-L", "RMF-M", and "RMU" as per Zoning By-law No. 200/06 will build out as apartments[1], properties zoned "RMF-S" will build out as rowhouses ("rows"), properties zoned "R2" will build out as semi-detached dwellings ("semis"), and "R1" properties as single-detached dwellings ("singles"), all of which would build out to the densities described in Figure 4-1 and in accordance with two different supply scenarios further described below. These are derived from an analysis of average dwelling type densities in greenfield areas. Where the site has not been subdivided and rezoned, dwelling types are projected to these densities based on local area plan policies. Where there is no Council-approved secondary plan or non-statutory area master plan, an average mix of dwelling types and densities are applied at a site level based on averages from existing developing areas.

[1] All dwelling unit types are defined in Section 5.3.

Zoning	Dwelling type	Density (units per net acre)	
		Standard	Alt. higher
RMF-L and RMU	Apartments	38	54.5
RMF-M	Apartments	37.5	46
RMF-S	Rows	17.5 or 23*	17.5 or 23
R2	Semis	14	14
R1	Singles	7.3	7.3
* - "Block-oriented" rowhouse sites are projected to 17.5 units per net acre, while "site-oriented rowhouse sites are projected to 23 units per net acre.			

Figure 4-1: Density assumptions by dwelling type

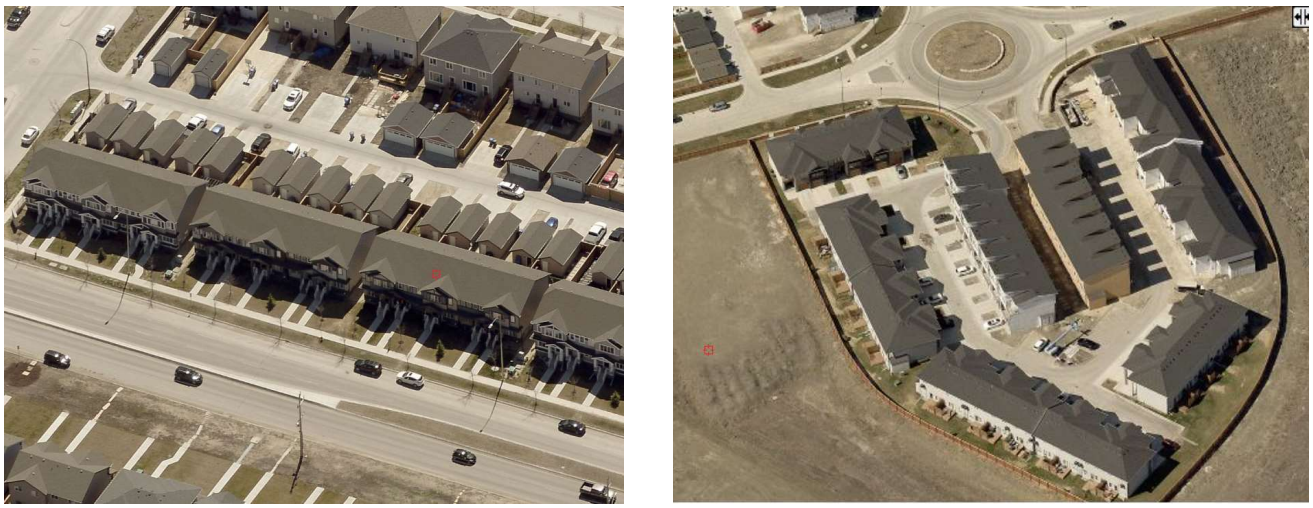

Figure 4-2: Example of "block-oriented" (left) and "site-oriented" rowhouse sites

This describes a generalized approach to forecasting based on average assumptions. However, consultation with a site's development interests can reveal plans that may deviate from this generalized approach. As a result, it was necessary to develop consistent parameters to inform when deviations can be considered that would allow for accurate forecasting while still providing methodological transparency.

- First, this methodology will only consider a deviation informed by a site's development interests once an urban subdivision and zoning is in place. Development plans can be subject to change; this methodology will not adjust its approach until alternative plans have been committed to via a Council-approved subdivision and rezoning application. Once this is in place, this methodology will consider, for example, increasing forecasted single family densities or allocating alternative dwelling types relative to a site's zoning as per the developer's suggestion.
- Relatedly, this methodology will not presuppose future rezonings. For example, it will not allocate dwelling units to a commercial-zoned property, even if the developer

indicates an intention to make a future application. It will only make such an adjustment after Council approval.
- Prior to Council approval of an urban subdivision, it will apply an average greenfield density. However, it will instead consider applying an average mix of ground-oriented units if there is a rationale warranting it. For example, this would be the case if both the developer and Public Service agree there are servicing constraints limiting typical greenfield apartment development.
- While it will not entertain deviations from its standard methodology that do not follow the above parameters, it nonetheless recognizes the value of such developer commentary. The Public Service will endeavour to capture this commentary in this report, even if it does not alter the nature of its forecasts.

An important part of forecasting supply entails refining the developable area. First, not all residential-designated lands can be developed for residential purposes. For example, land is needed for public rights-of-way, laneways, parks and open spaces, school sites, and local commercial uses. To account for this, a conversion rate of 0.5 is applied to gross residential land to reflect the net developable area. For example, it is assumed that 50 acres of a 100 gross acre site could be developed for residential uses, with the additional 50 acres being occupied by parks, roads, and other uses. The uses accounted for in this gross-to-net conversion are found in most greenfield developments and typically occur at the same general frequency. A 0.5 conversion rate may be low for other jurisdictions but is appropriate for the local context given larger requirements for land drainage ponds.

Second, in addition to the common land uses accounted for in the gross-to-net conversion, there may be additional lands that are undevelopable or are unlikely to develop to urban uses whose occurrences are more unique to the specific site. These lands can include hydro right-of-ways and substations, land identified for future highway interchanges, and lands occupied by existing dwellings. Land areas associated with these uses are subtracted from the site's gross land area. Regarding lands occupied by existing dwellings, pockets of existing rural residential development are typically identified as undevelopable, even if there may be opportunities for the subdivision of existing larger lots when the wider area develops to urban densities, as this development would occur more sporadically more akin to infill development, and is therefore a less reliable source of land supply.

Once a site's total potential supply is determined, previous development activity is subtracted to arrive at a forecast of remaining units. The sum total of potential remaining units for all sites comprises the Standard supply scenario. An Alternative Higher supply scenario is also prepared to consider the land supply implications of a market shift towards higher densities. More specifically, it assumes that a) 15% of remaining available single family dwellings are instead developed as a mix of semi-detached and rowhouse dwellings[1], and b) higher apartment densities in accordance with Figure 4-1.

[1] 58% of this land area would instead be developed as semi-detached dwellings, while 42% would be developed as rowhouses. This is based on the proportion of "R2"-zoned land to "RMF-S"-zoned land in sampled greenfield areas.

Step 3: Update projected greenfield land demand

The methodology for forecasting greenfield residential demand is based on two data sources. The first is the *City of Winnipeg Population, Housing, and Economic Forecast*, which was prepared in 2016 as a reference document to support planning in the organization and intended to provide a common basis from which decisions can be made. It was commissioned by the City and prepared by the Conference Board of Canada. The second dataset is historical residential permit data. An alternative forecast was prepared based on the five-year average of new residential units and accounting for projected changes in household size and the share of regional residential growth captured by the City of Winnipeg. A third forecast was then created averaging the difference between these two forecasts.

Once this "mid-range" forecast is developed, further assumptions need to be made on the following items to refine forecasted demand:

- An intensification rate for every year of the forecast (i.e. the percentage of new dwelling units located in greenfield and infill areas); and
- A distribution of units by dwelling type for greenfield and infill areas for every year of the forecast.

Three demand scenarios were created to guide these assumptions. These scenarios were modeled after the three growth scenarios described in the *OurWinnipeg Residential Growth Study* that were used to develop *OurWinnipeg 2045* and *Complete Communities 2.0* policies. These scenarios forecast demand for each residential dwelling type in both greenfield and infill areas every year to 2050; they are described in Figure 4-3 below:

Scenario	Change in greenfield share	Change in dwelling types relative to existing rates
60% greenfield	Steady increase from existing rates to 60% greenfield by 2030, after which it slowly increases to 62% by 2050.	Steady increase in all dwelling types in greenfield areas.
50% greenfield	A 50% intensification target is maintained every year to 2050.	Small increase in dwelling types in greenfield areas as easier infill sites are developed; a 50% intensification rate is maintained despite this increase in greenfield areas.
40% greenfield	Greenfield share decreases to 45% by 2026 and 41% by 2030, after which it slowly decreases to 40% by 2050.	Very small increase in greenfield singles over 30 years, while semis generally remain unchanged. Moderate decrease in greenfield rows, and steady decrease in greenfield apartments.

Figure 4-3: Forecast demand scenarios

The 50% intensification target will be the basis for assumed land absorption in determining years supply, but the other scenarios are critical to communicate the potential implications of market change.

The first two scenarios, as well as the decision to use the 50% greenfield scenario as the basis for forecasting land absorption, may appear overly conservative in light of the intensification rate since 2018. This increased intensification rate is being driven by a market shift in demand for multifamily units relative to single-detached units during this time period. The Urban Planning & Design Division will continue to monitor this to determine if this is a longer-term shift or if this is simply a multi-year aberration. It would likely require an updated population and housing forecast to corroborate this before substantially deviating from an assumed 50% infill land absorption in determining years supply.

Step 4: Forecast years of supply

Finally, years supply is determined by dividing the total supply by forecasted annual greenfield absorption. This report's years supply findings are based on a) the primary supply forecast, and b) a 50% greenfield demand scenario. However, alternative findings were also prepared based on the alternative supply forecast as well as 60% and 40% demand scenarios to allow the City to understand the implications of changing market conditions.

4.2 Non-Residential Methodology

4.2.1 History

In comparison with its residential work, the Public Service has spent fewer years monitoring non-residential development trends, analyzing industrial and commercial land supplies for fewer years, and refining its methodologies. Its non-residential monitoring activities trace back to the Employment and Commercial Lands Study that was prepared in 2018 as a background study to the OurWinnipeg/Complete Communities review process and provided to Council in 2019. The study's main findings were as follows:

- The City faces a large shortfall of vacant serviced employment lands to accommodate forecasted growth over the next 20 years;
- City competitiveness is being compromised by the fact that serviced industrial lands are not sufficiently being brought on-stream and that there is no clear vision or strategy to do so;
- Capital Region municipalities are becoming increasingly competitive relative to the City; and
- There is more than enough vacant commercial land to accommodate forecasted growth over the next 20 years.

The study recommended that the City develop a system for tracking and monitoring employment and commercial land needs building off the baseline 2011 to 2016 data and methodology of the study. This recommendation aligned with the City's expectations

prescribed in the scope of work, which requested that the study provide it with the means of monitoring its employment land supply on an on-going basis.

In May 2022, Council gave third reading to *Complete Communities 2.0*, which includes new policies related to non-residential land supplies. These policies are summarized in Section 3.2 of this report.

4.2.2 Description of Methodology

The following section describes non-residential monitoring activities, beginning first with an analysis of non-residential development trends before breaking off into industrial and commercial analyses of land supply and forecasted demand.

Step 1: Compare and compile data

It is important to establish a baseline understanding of development trends before forecasting land needs. First, all permits for the construction of non-residential development entailing new or expanding floor area are extracted from gross permit data from the City's database to January 1 of the current year.

Once this is established, new fields are added to the dataset to facilitate analysis, including job type, an assessment of whether the new development is an addition to an existing building or the construction of a new one, an assessment of whether the new development is occurring on vacant land (absorption) or is an intensification of a previously-developed site, the estimated number of jobs represented by the development, and its geographic location, including its location within Employment Land designations, City quadrants, and Employment and Commercial Lands Study clusters.

More specifically, non-residential construction is assigned one of the following job categories below based on the permit's description. Figure 4-4 provides a brief description, including industry examples.

Category	Includes:
Education	Includes schools, universities, and colleges
Industrial	Manufacturing uses
Office	Purpose-built primary office uses. Does not include office uses accessory to another use such as an industrial or warehouse use
Retail	Retail uses, including car dealerships, gas stations, commercial retail units, banks, restaurants, hotels, and car washes
Service	Includes public and private institutional and recreational uses, such as libraries, day cares, indoor playgrounds, community centres, places of worship, hospitals and medical clinics, museums and art galleries, airport, assisted living facilities, and golf clubs.
Warehouse	Warehouse uses, including self-storage facilities

Figure 4-4: Job type descriptions and examples

In order to better understand differences between these categories, Figure 4-5 below describes how these employment categories relate to the North American Industry Classification System (NAICS) 20 industry classification system:

NAICS 20	Ind	War	Ret	Off	Edu	Ser
11 Agriculture, forestry, fishing, and hunting						
21 Mining, quarrying, and oil and gas extraction						
22 Utilities	1					
23 Construction	0.5	0.5				
31-33 Manufacturing	1					
41 Wholesale trade		1				
44-45 Retail trade			1			
48-49 Transportation and warehousing		1				
51 Information and cultural industries				1		
52 Finance and insurance				1		
53 Real estate and rental and leasing				1		
54 Professional, scientific, and technical services				1		
55 Management of companies and enterprises				1		
56 Administrative and support, waste management and remediation services				1		
61 Educational services					1	
62 Health care and social assistance						1
71 Arts, entertainment, and recreation						1
72 Accommodation and food services						1
81 Other services (except public administration)						1
91 Public administration				1		

Figure 4-5: Job categories in relation to the NAICS 20 classification system

In estimating the number of jobs represented by the non-residential construction, the following jobs per floorspace assumptions were used[1] (requiring permits to be sorted by this category as well):

Category	Floor area per job
Industrial/warehousing	1,076 sq. ft.
Institutional	700 sq. ft.
Non-office commercial	431 sq. ft.
Office	291 sq. ft.

Figure 4-6: Jobs per floor area assumptions

Step 2: Update industrial supply

Updating the City's industrial land supply consists of a number of steps. This methodology is based on what was used in the *2018 Employment and Commercial Lands Study* (ELS).

First, the inventory of vacant industrial-zoned land from the previous year is reviewed. Newly-created and newly-vacated properties are added, while parcels having undergone development in the previous year are removed. From there, parcel zoning and their servicing status as either estimated locally serviced (i.e. "shovel-ready") or unserviced is reviewed, the latter of which is based on proximity to local water and sewer mains and lot configuration. The ELS emphasized the importance of this distinction, noting that, "vacant serviced industrial lands are generally smaller in size", while "vacant unserviced industrial lands… are found in areas that have access issues, require extensive and costly infrastructure service runs, cannot be serviced in a cost-effective manner, are rearage lands requiring access and servicing through private lands, or some combination of the above". It also notes that unserviced areas, "typically cannot be serviced and brought on-stream in a cost-effective manner by a developer", and that the City may have to plan a more active role in bringing these lands on-stream (p. 6-10 to 6-11). While more recent private sector-led development in the region suggests this may be less the case than when the study was drafted, the City may still not be in a position to take private sector-led local servicing of industrial lands for granted. As a result, this distinction should be reflected in the interpretation of land supply results.

At this point, two additional analyses are undertaken beyond what was done in the ELS to provide a more nuanced understanding of the City's industrial land supply. First, each parcel in the inventory is analyzed against the list of potential encumbrances in Figure 4-7 below that may limit their developability. Sites without any noted encumbrances are recognized as "unencumbered" in the industrial supply summary. While the ELS addressed this issue of

[1] Source: City of Winnipeg Determination of Regulatory Fees to Finance Growth: Technical Report, p. 38.

undesirability by discounting 15% of the City's supply, it was felt that this approach was more accurate.

Potential site encumbrances
Undevelopable configuration;
An industrial use would be inconsistent with planning policy (e.g. Complete Communities, area secondary plan);
Constrained vehicular access;
Development of the site likely requires consolidation with other adjacent parcels;
The site is smaller than 1 acre in area; and
The site is currently occupied by a use without a permanent, principal structure, such as an employee amenity space, outdoor storage, or parking.

Figure 4-7: Potential industrial land supply encumbrances

The Public Service also added an analysis quantifying the further developability of underdeveloped sites. It did this by first screening all occupied industrial-zoned properties with a minimum lot area of two acres and a building-to-lot area coverage ratio less than 0.25. Identified parcels were then cross-referenced with aerial photography to confirm they could realistically accommodate additional development; portions of sites must be entirely unused (i.e. including for non-structural uses such as parking, outdoor storage, landscaped screening, drainage ponds, or employee amenity spaces), must be a of a developable configuration and size, and must have a conceivable means of access. Polygons are then traced over the developable portions of these sites, who then comprise this category of supply.

Finally, industrial supplies are analyzed by category, including by industrial Emerging Sites, which are large areas of regionally-serviced, industrial-zoned land, as well as designated and regionally unserviced future sites.

Step 3: Review industrial demand

Forecasted employment land demand is derived from the Winnipeg Metropolitan Region's *Long-Range Residential & Employment Land Forecasts (202*1), which was prepared as a background study to its regional *Plan 20-50*. It projected the City of Winnipeg to accommodate between 91,000 (baseline scenario) and 125,000 (high growth scenario) new jobs from 2021 to 2051, which translates to a 2,000-acre gross employment land need.

From total land need, net City of Winnipeg industrial land supply is subtracted to determine shortfall/surplus, while annual demand is determined by dividing net supply by annual demand.

Step 4: Update commercial supply

In accordance with the ELS, this study considers three components of commercial land supply: vacant commercial-zoned land, land located in Regional Mixed Use Centres and commercial Emerging Sites whose commercial rezoning has been approved by Council but has not yet come into force, and the continued build-out of underdeveloped sites in Regional Mixed Use Centres and Emerging Sites.

Similar to the process for updating industrial supply, the inventory of vacant commercial-zoned land from the previous year is reviewed by adding newly-created and newly-vacant properties and removing parcels developed in the previous year. Additional review is given to sites identified as a commercial Emerging Site as well as Regional Mixed Use Centres designated in Complete Communities 2.0 to quantify all approved but non-vested commercial land and opportunities for continued build-out of existing sites up to a 25% lot coverage.

In contrast to industrial land supply, commercial supply reporting does not distinguish between level of existing servicing. This is consistent with the approach used in the ELS. This is because there is less concern about the viability of private sector-led local servicing than is the case with industrial development. For similar reasons, it also includes non-vested commercial zoning and the continued build-out of developing sites.

Step 5: Review commercial demand

Commercial demand is derived using the same methodology as was used in the Employment and Commercial Lands Study and described in Appendix F of that document. It translates forecasted food-related, non-food-related, and service expenditures in the City of Winnipeg to expected commercial floor area to 2041. Key assumptions include:

- The assumed ratio of commercial floor area to commercial expenditures;
- The share of e-commerce retail to ground-related retail;
- The City of Winnipeg's share of region-wide commercial growth;
- Per-capita commercial expenditures; and
- Lot area to building coverage ratio.

This report used the same demand forecast as was used in the ELS, with one notable exception. The ELS forecast assumed levels of e-commerce based on data gathered prior to COVID-19. The pandemic had the effect of greatly accelerating pre-existing e-commerce growth. As a result, a second demand forecast was prepared assuming higher shares of e-commerce. Differences are described in Figure 4-8 below. E-commerce scenario shares were developed mindful of a 2020 pandemic baseline described in Canada-wide Figure 4-9 but conservatively assuming slower growth relative to ground-oriented sales post-pandemic.

	2016	2021	2026	2031	2036	2041
Non-food-oriented retail						
ELS forecast	1.4	1.9	2.4	2.9	3.4	3.9
Higher e-commerce scenario	1.4	4.5	5.2	5.9	6.6	7.3
Food-oriented retail						
ELS forecast	0.2	0.5	0.7	1	1.2	1.5
Higher e-commerce scenario	0.2	1.5	1.8	2.1	2.4	2.7

Figure 4-8: E-commerce omni channel sales as percent of total forecasted per capita expenditures

	2016	2017	2018	2019	2020
Canada-wide	2.2	2.7	2.9	3.5	6.4

Figure 4-9: E-commerce omni channel sales as percent of total forecasted per capita expenditures, all retail[1]

The City's commercial land supply surplus/shortfall can then be determined by subtracting the long-term land requirement from the overall land supply, while years supply is determined by dividing the long term land requirement by forecasted annual land absorption.

4.3 Recent Industry Consultation

In Fall 2021, the Public Service undertook a stakeholder engagement program to inform a report to Council in 2022. With regards to residential land monitoring, it relied on the Urban Development Institute of Manitoba, a non-profit organization representing the development industry and associated businesses and organizations in the Winnipeg region.

On October 12, 2021, it presented its residential land monitoring findings to UDI representatives, after which it provided material for participant review, including files detailing greenfield land supply, projected demand, years supply, and site maps indicating undevelopable land. After providing participants with an opportunity to review material, both parties reconvened on November 22, where UDI reps provided the City with initial feedback. At this meeting, UDI reps agreed that they would review the sites they are most familiar with and would provide more detailed feedback at the following meeting. This was done on December 9, where the City also responded to comments that were made in the earlier November 22 meeting.

Following the December meeting, UDI reps sent the Urban Planning & Design Division their written comments, after which individual meetings were held over the following months. Engagement activities concluded with a final meeting on May 6, 2022, where the City provided its response to all comments received throughout the engagement as well as the results of its January 2022 update. Both parties agreed to re-engage annually on this topic.

Feedback received in these meetings was organized into three categories:

[1] Source: Statistics Canada

1. Refining land that should be considered undevelopable;
2. Reconciling City-UDI differences in site supply forecasts, where the goal was to understand and be able to explain differences after which the City could make the best decision on how to proceed; and
3. High-level comments, such as the importance of recognizing that demand for ground-oriented units drives demand for greenfield areas.

As a result of UDI feedback the following changes were made to the City's supply forecasts:

- Land supply forecasts were refined to distinguish supplies of ground-oriented units from total dwelling units;
- Site supply forecasts were refined by comparing City forecasts derived from a standardized methodology to developer plans, and as a result, parameters were established to direct when the City would deviate from its projections, and instances of City/developer discrepancies were noted; and
- Lands described as undevelopable were refined. In many cases, feedback helped capture lands planned for future development, such as future regional parks or interchanges.

In parallel with its residential engagement, the Public Service undertook the same with non-residential stakeholders. On October 27, 2021, it presented a summary of its non-residential land monitoring activities to a broader group that included developer, property broker, and CentrePort representatives, after which it provided its materials to participants and asked that it receive comments by November 17. Following this meeting, it received feedback from three participants, after which it engaged in dialogue through emails and phone calls. On November 23, it provided participants with a summary of feedback received. While this summary stated that it did not feel as though a follow-up meeting with the larger group was required, it would also reconsider if anyone disagreed; none of the participants requested an additional group meeting.

The following is a summary of the themes discussed in the non-residential stakeholder meetings:

- **There was a lack of clarity over how "absorption" was defined.** Since some stakeholders consider absorption to refer to the servicing of land in advance of development, there was some confusion over numbers presented in this work that, consistent with the ELS, considered absorption to be development on vacant parcels. Some stakeholders indicated that the City's definition is not inappropriate, but there is a need to be clear in our definition. Some also questioned whether it was appropriate to consider large sites as being fully absorbed if development only occurred on a small portion of the lot . The City acknowledges the potential for the exclusion of these sites to misrepresent its land supply, but it cautions against the challenge of doing this is a

consistent and transparent way. Instead, the City's methodology addresses this by recognizing the potential of intensification in its supply.



Figure 4-10: 195 Haggart Ave as an example of an absorbed parcel

- **The City's definition of absorption, including its Capital Region analysis, underrepresents the large supply of serviced, ready-to-build industrial land that has been made available in surrounding rural municipalities.** This large supply in relation to the relatively small amount of industrial land being marketed in the City stands to significantly influence the regional market, with one stakeholder noting that his may drive prices down in the region and further compromise Winnipeg's competitiveness. Another stakeholder suggested that additional work be undertaken to quantify this regional supply.
- **Capital Region competition vs collaboration.** Consistent with previous messages the City has received dating back to the drafting of the 2018 ELS, some stakeholders stressed the importance of regional collaboration in the accommodation of employment growth.
- **The challenge of measuring non-residential supply and development.** Some stakeholders stressed the importance of considering these measures in relation to economic growth and the creation of new jobs, noting a difference between non-residential development that relocates existing jobs versus creating new ones. The age of the City's industrial building space inventory as well existing vacancy rates should be recognized in relation to the demand for more modern features.

Stakeholder feedback helped refine the City's interpretation of its supply results, further emphasize the importance of understanding the regional industrial supply, and confirm its industrial lot coverage assumptions.

5.0 Residential Development Activity

5.1 Intensification Target

In 2021, 61% of all permits issued for the construction of new residential dwelling units were located in the intensification target area. As described in Map 2 of the General Growth section of *Complete Communities 2.0* and Figure 5-3 below, it is the portion of the urban area of the city that is considered to be built out (on a neighbourhood basis). Development that occurs within is generally considered to be infill, while outside is either greenfield or rural development. For each of the last four years, the City has exceeded *Complete Communities'* 50% target.

Year	%
2018	58.4
2019	63.5
2020	53.6
2021	61.2
Avg	59

Figure 5-1: Percent of new residential dwelling units located in the intensification target area, by year

This is a notable shift in the residential market in that prior to 2018, the City had only exceeded 50% intensification once between 2011 and 2017. Of note is that there continues to be high variability in this distribution year-over-year; the number of new dwelling units per year is small enough that one or two large apartment developments can have an outsized influence on final percentages.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	5 yr avg
Greenfield	61.0	56.7	55.7	36.4	53.0	53.1	66.9	42.6	36.9	46.8	39.6	46.6
Intensification	38.3	42.7	44.1	63.3	46.9	46.6	32.9	57.2	63.0	52.9	60.3	53.3

Notes:

- Figures are gross and do not account for demolitions.
- Minor differences between this table and Figure 5-1 above are attributable to minor geographic differences.
- Remaining balance of residential development activity is comprised of a small amount of development in Rural & Agricultural areas.

Figure 5-2: Percent of new residential dwelling units as greenfield and intensification, by year

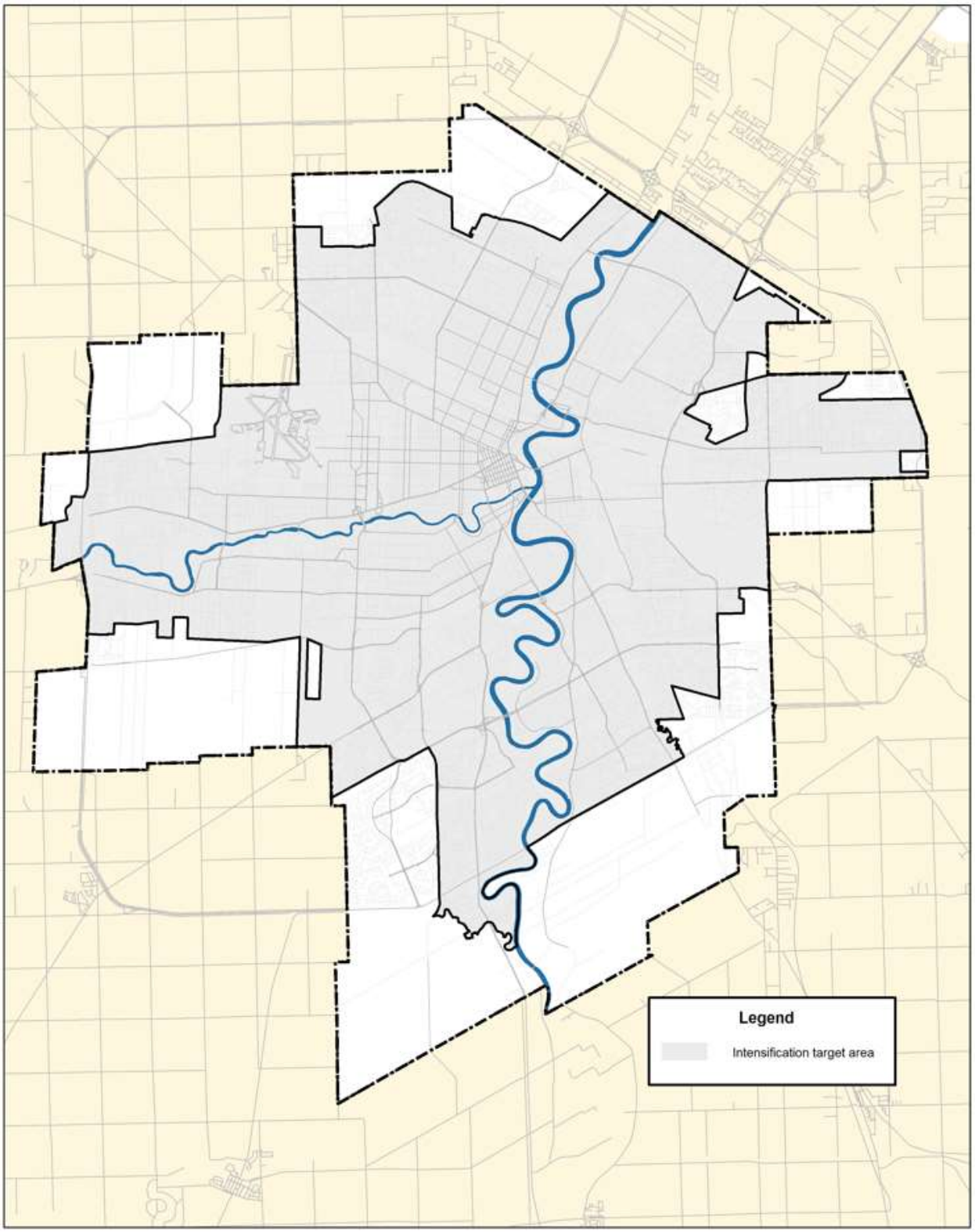

Figure 5-3: Intensification target area

This increased level of intensification relative to Complete Communities' intensification target can be largely explained by the increased development of multifamily units relative to the Conference Board of Canada forecast in the *City of Winnipeg Population, Housing, and Economic Forecast*, which was the basis for establishing the 50% target. The greater the share of new residential dwelling units being built as multifamily dwelling types, particularly apartments, the more easily the City will be able to achieve its intensification target.

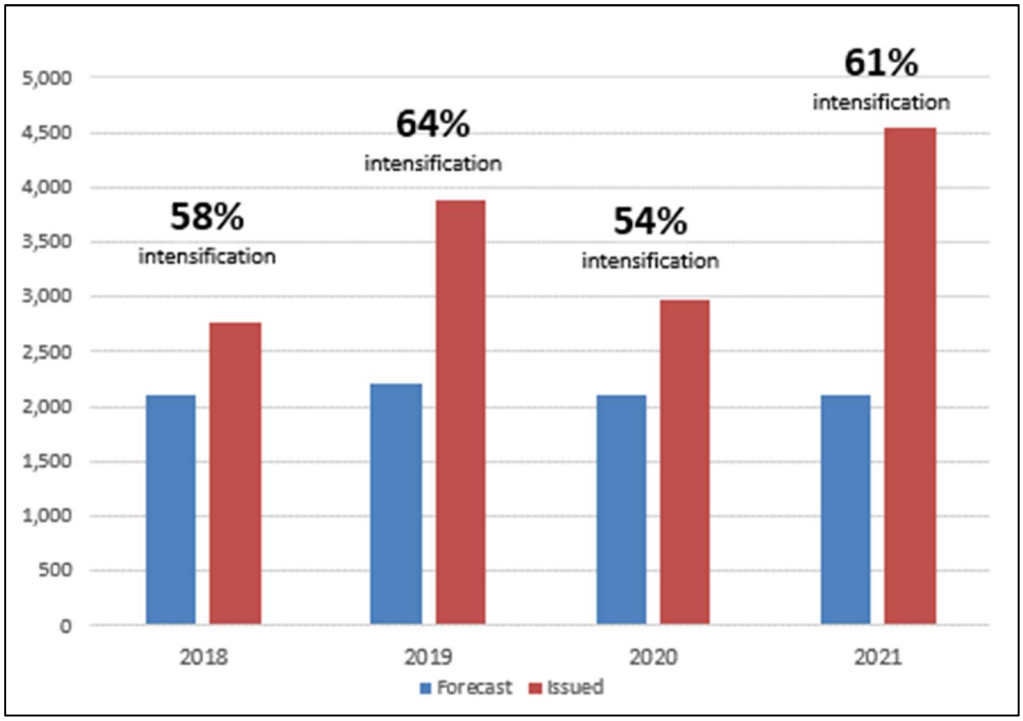

Figure 5-4: Forecasted and issued new multifamily residential dwelling units in relation to intensification rates

It should also be noted that, in absolute terms, the volume of greenfield development has remained relatively consistent over the last decade. Its declining overall share can be attributed to higher overall rates of infill development more recently. This is best shown in Figure 5-11 below.

Complete Communities 2.0 establishes an intensification target specific to Downtown. It aims to establish a minimum of 350 new dwelling units per year until 2030, and 500 dwelling units per year after that. Rates of Downtown development have followed the intensification target trend in that a demonstrable increase in activity is visible after 2017.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	5 yr avg
Downtown	81	94	215	523	188	229	274	596	554	492	352	454

Figure 5-5: Permits issued for new residential units Downtown, by year

5.2 Development Activity by Urban Structure

The tables below indicates residential development activity on both total and percentage share bases in relation to the Urban Structure of *Complete Communities 2.0*.

	2018	2019	2020	2021	Avg.
CITY TOTAL	4,412	5,451	4,310	6,473	4,129
Greenfield development	**1,860**	**1,994**	**2,017**	**2,548**	**2,105**
Emerging Communities	1,860	1,994	2,017	2,548	2,105
New Communities	0	0	0	0	0
Intensification	**2,544**	**3,453**	**2,282**	**3,918**	**3,049**
Downtown	596	554	492	352	499
Major Redevelopment Sites	296	132	452	793	418
Corridor frontage	65	768	30	698	390
Urban Corridors	41	133	30	293	124
Regional Corridors	24	635	0	405	266
Established Neighbourhoods	1,587	1,999	1,308	2,075	1,742
Mature Communities	871	1,164	776	816	907
Recent Communities	716	835	532	1,259	836
Rural Agricultural	**8**	**4**	**11**	**7**	**8**

Figure 5-6: Permits issued for the construction of new residential dwelling units, by *Complete Communities 2.0* Urban Structure

	2018	2019	2020	2021	Avg.
Greenfield development	**42.2**	**36.6**	**46.8**	**39.4**	**41.2**
Emerging Communities	42.2	36.6	46.8	39.4	41.2
New Communities	0	0	0	0	0
Intensification	**57.7**	**63.3**	**52.9**	**60.5**	**58.6**
Downtown	13.5	10.2	11.4	5.4	10.1
Major Redevelopment Sites	6.7	2.4	10.5	12.3	8.0
Corridor frontage	1.5	14.1	0.7	10.8	6.8
Urban Corridors	0.9	2.4	0.7	4.5	2.1
Regional Corridors	0.5	11.6	0.0	6.3	4.6
Established Neighbourhoods	36.0	36.7	30.3	32.1	33.8
Mature Communities	19.7	21.4	18.0	12.6	17.9
Recent Communities	16.2	15.3	12.3	19.5	15.8
Rural Agricultural	**0.2**	**0.1**	**0.3**	**0.1**	**0.2**

Figure 5-7: Share of permits issued for the construction of new residential dwelling units, by *Complete Communities 2.0* Urban Structure

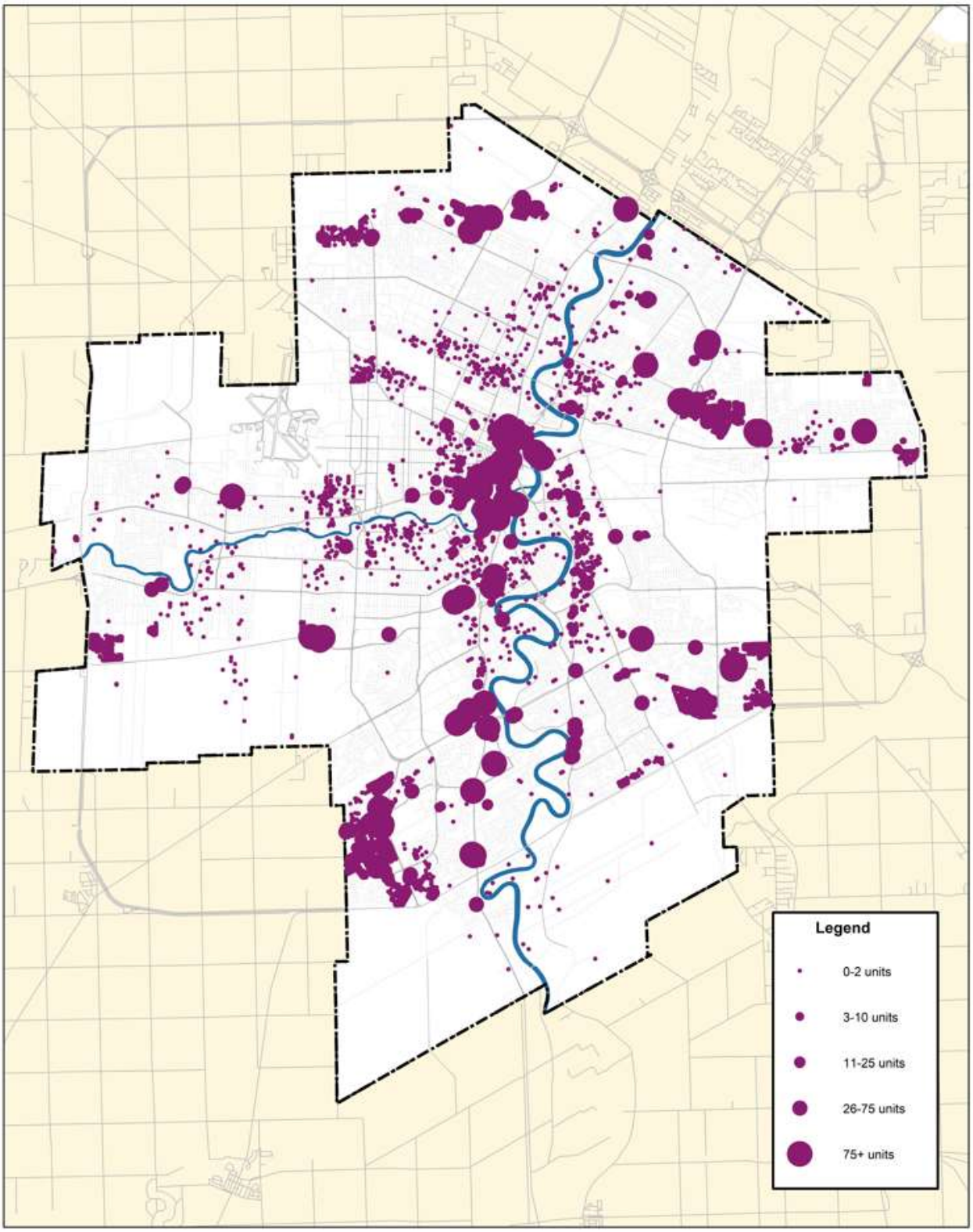

Figure 5-8: Permits issued for the construction of new residential dwelling units, 2017-21

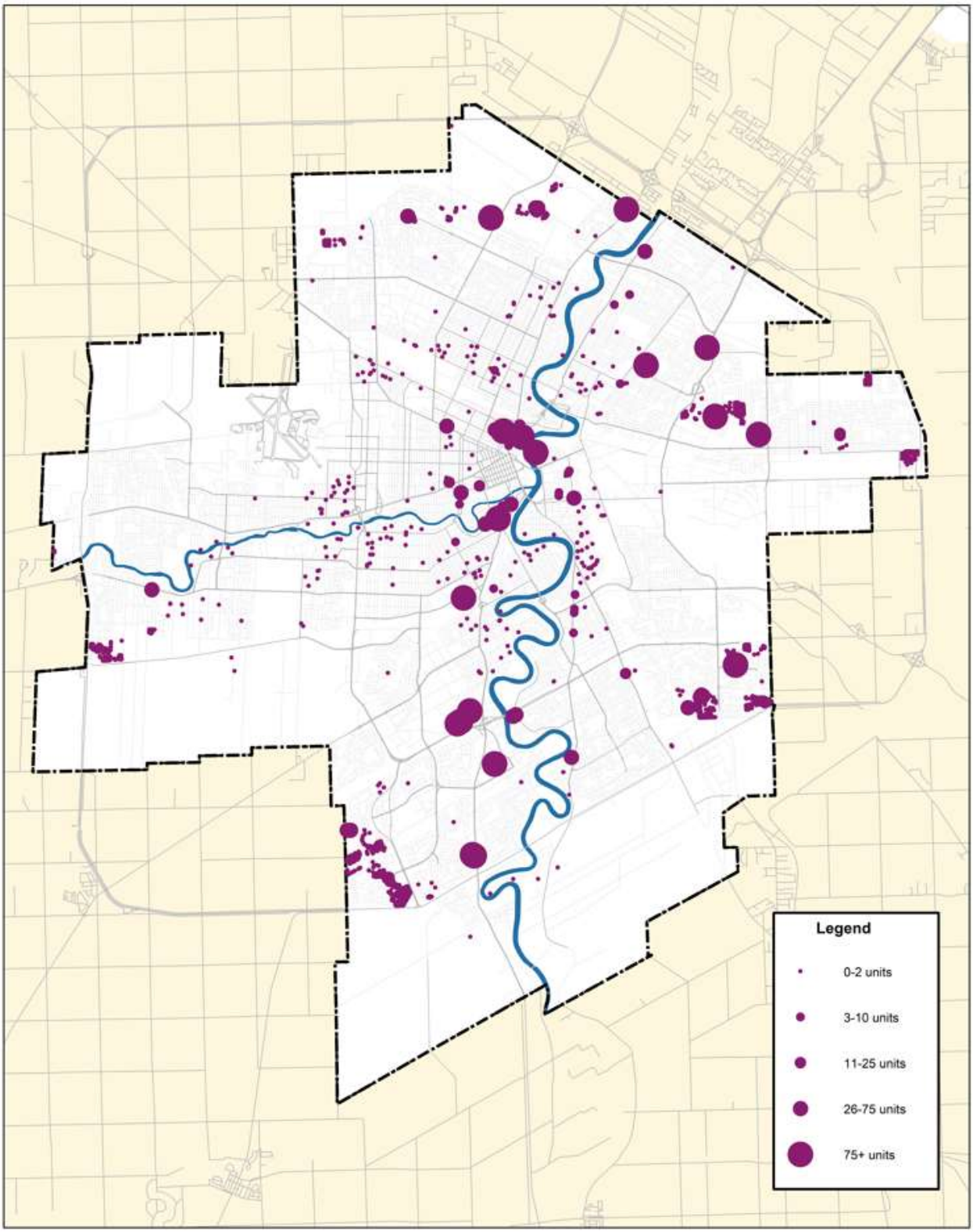

Figure 5-9: Permits issued for the construction of new residential dwelling units, 2021

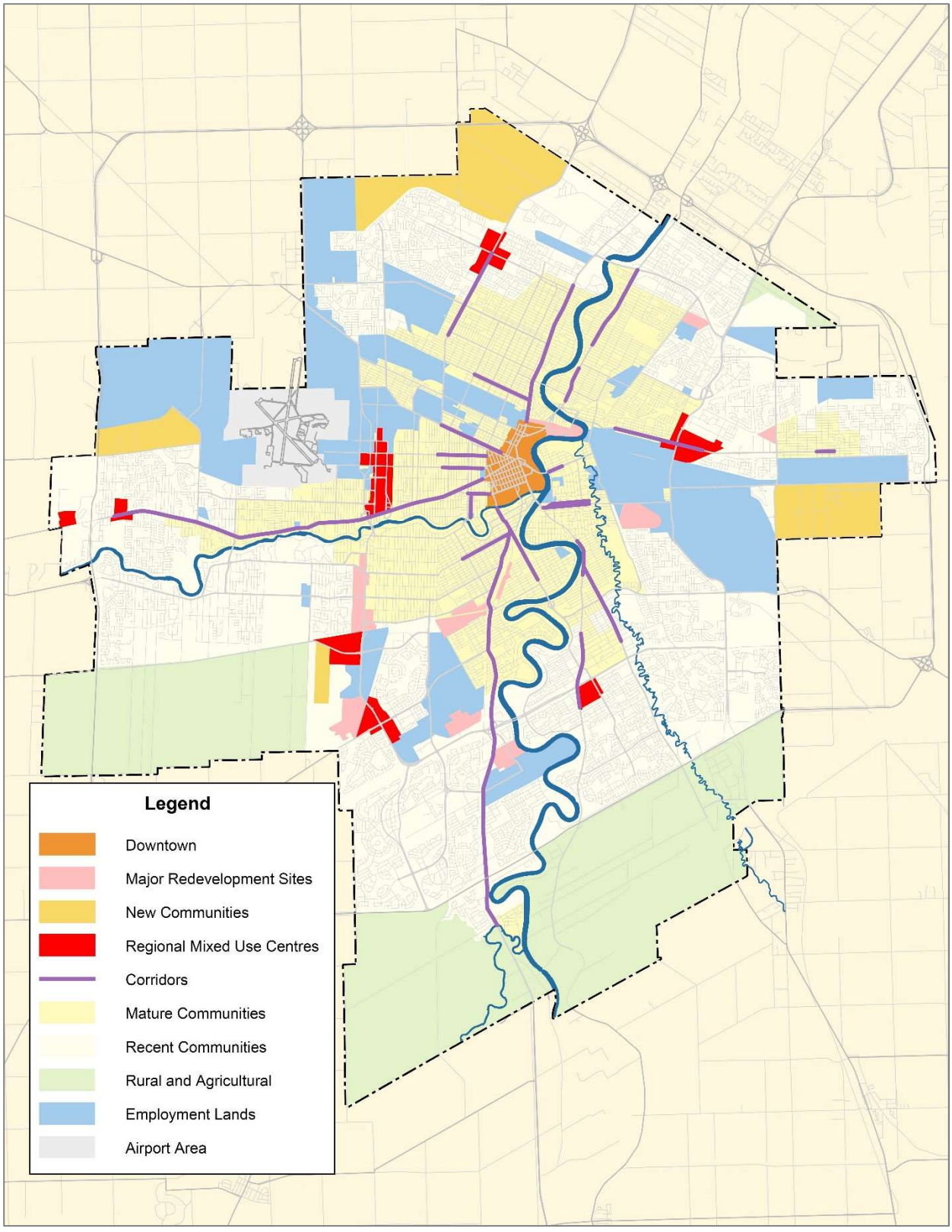

Figure 5-10: Complete Communities 2.0 Urban Structure

The distinction between the Urban Structures of *Complete Communities 2.0* and the original *Complete Communities Direction Strategy* from 2011 is notable given differences between them. Below is data for the latter version of the Urban Structure going back to 2011.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Avg. (last 5 yrs)
CITY TOTAL	3,103	3,739	3,395	4,761	3,810	4,153	5,237	4,412	5,451	4,310	6,473	5,177
Greenfield development	**1,893**	**2,121**	**1,891**	**1,735**	**2,018**	**2,207**	**3,501**	**1,879**	**2,012**	**2,019**	**2,565**	**2,395**
Emerging Communities	1,893	2,121	1,880	1,528	1,651	1,689	2,485	1,181	1,139	1,245	1,492	1,508
New Communities	0	0	11	207	367	518	1,016	698	873	774	1,073	887
Intensification	**1,189**	**1,595**	**1,497**	**3,015**	**1,786**	**1,936**	**1,723**	**2,525**	**3,435**	**2,280**	**3,901**	**2,773**
Downtown	81	94	215	523	188	229	274	596	554	492	352	454
Major Redevelopment Sites	15	43	0	21	80	97	1	296	132	454	928	362
Corridor frontage	126	117	174	319	143	260	220	198	804	209	1,128	512
Areas of Stability	967	1,341	1,108	2,152	1,375	1,350	1,229	1,435	1,945	1,127	1,517	1,451
Mature Communities	305	702	402	718	662	593	664	780	1,238	731	740	831
Recent Communities	660	637	706	1,434	712	750	557	655	706	395	777	618
Other	2	2	0	0	1	7	8	0	1	1	0	2
Rural Agricultural	**21**	**23**	**7**	**11**	**6**	**10**	**13**	**8**	**4**	**11**	**7**	**9**

Notes:

- Entries the summation of individual subordinate rows may not align due to overlapping boundaries between Downtown and the South Point Douglas Major Redevelopment Site.

- Areas of Stability "Other" refers to the west side of Ferry St between St Matthews Ave and Silver Ave which is technically designated as Airport Area.

- Rural residential development occurring in unplanned New Communities as per an enabling secondary plan classified under Rural Agricultural.

Figure 5-11: Permits issued for the construction of new residential dwelling units, by *Complete Communities Direction Strategy* (2011) Urban Structure

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Avg. (last 5 yrs)
Greenfield development	**61.0**	**56.7**	**55.7**	**36.4**	**53.0**	**53.1**	**66.9**	**42.6**	**36.9**	**46.8**	**39.6**	**46.6**
Emerging Communities	61.0	56.7	55.7	36.4	53.0	53.1	66.9	42.6	36.9	46.8	39.6	46.6
New Communities	0.0	0.0	0.3	4.3	9.6	12.5	19.4	15.8	16.0	18.0	16.6	17.2
Intensification	**38.3**	**42.7**	**44.1**	**63.3**	**46.9**	**46.6**	**32.9**	**57.2**	**63.0**	**52.9**	**60.3**	**53.3**
Downtown	2.6	2.5	6.3	11.0	4.9	5.5	5.2	13.5	10.2	11.4	5.4	9.2
Major Redevelopment Sites	0.5	1.2	0.0	0.4	2.1	2.3	0.0	6.7	2.4	10.5	14.3	6.8
Corridor frontage	4.1	3.1	5.1	6.7	3.8	6.3	4.2	4.5	14.7	4.8	17.4	9.1
Areas of Stability	31.2	35.9	32.6	45.2	36.1	32.5	23.5	32.5	35.7	26.1	23.4	28.3
Mature Communities	9.8	18.8	11.8	15.1	17.4	14.3	12.7	17.7	22.7	17.0	11.4	16.3
Recent Communities	21.3	17.0	20.8	30.1	18.7	18.1	10.6	14.8	13.0	9.2	12.0	11.9
Other	0.1	0.1	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	0.0	0.0
Rural Agricultural	**0.7**	**0.6**	**0.2**	**0.2**	**0.2**	**0.2**	**0.2**	**0.2**	**0.1**	**0.3**	**0.1**	**0.2**

Figure 5-12: Share of permits issued for the construction of new residential dwelling units, by *Complete Communities Direction Strategy* (2011) Urban Structure

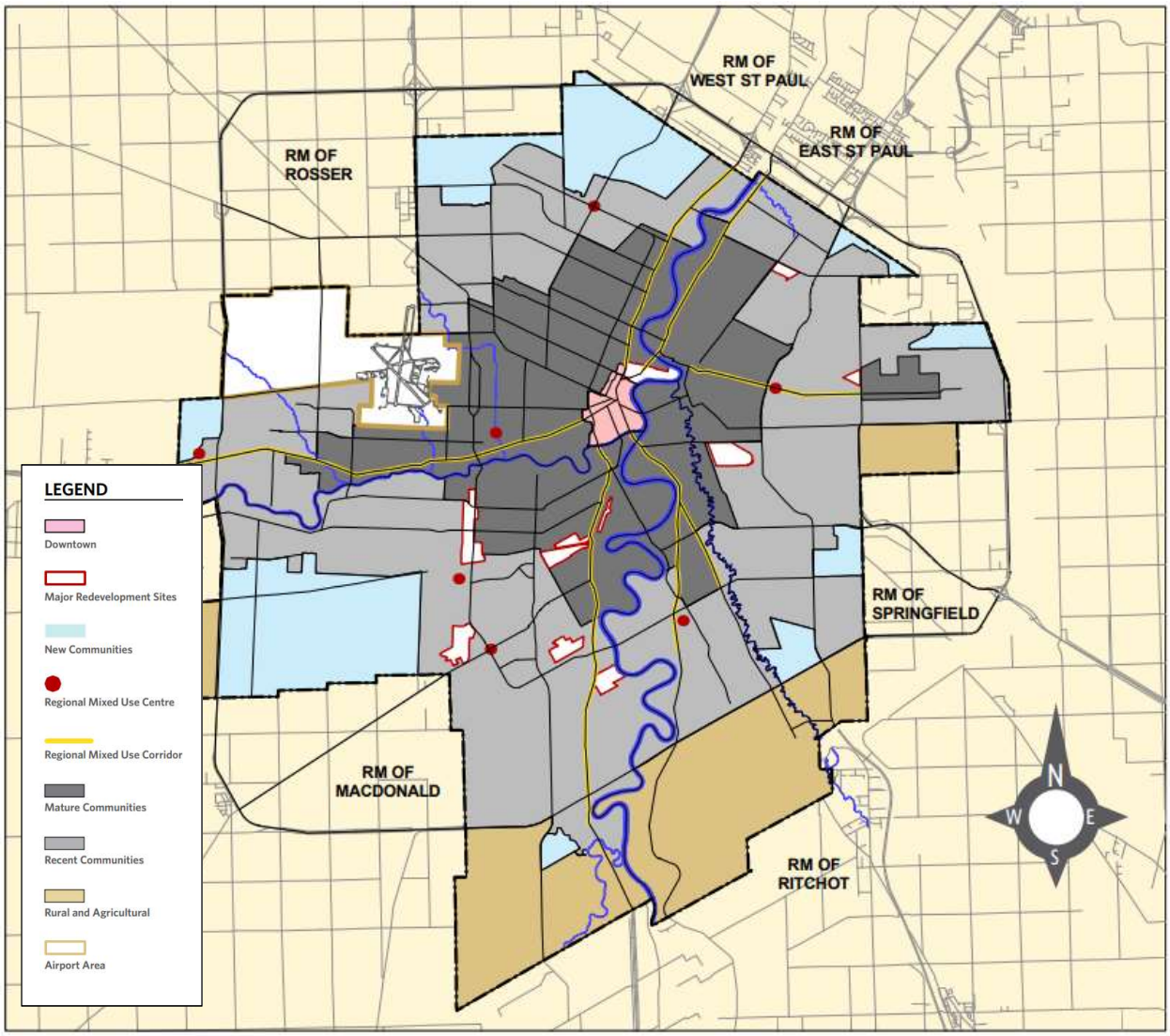

Figure 5-13: *Complete Communities Direction Strategy* (2011) Urban Structure

5.3 Development Activity by Dwelling Types

Residential development permits are classified into four dwelling types consistent with Statistics Canada definitions, as described herein.

Dwelling type	Definition
Single-detached (“singles”)	Single family dwelling unattached to any other dwelling with open space on all sides and no dwelling above or below. Considered a ground-oriented dwelling unit.
Semi-detached (“semis”)	One of two dwellings attached side-by-side or back-to-back to each other with no dwellings above or below it. Together, the two units have open space on all sides. Considered a ground-oriented dwelling unit.
Rowhouse (“rows”)	Three or more dwellings joined side-by-side or back-to-back, but not having any other dwellings above or below. Considered a ground-oriented dwelling unit.
Apartments	Dwelling units in a form other than what is described, including everything from an up-down duplex to a high-rise apartment.
Note: Secondary suites are excluded from these definitions	

Figure 5-14: Dwelling type definitions used in this report

The chart below indicates dwelling types by year since 2016. It illustrates a large share increase in apartment units, while other dwelling types showed little variability. From 2017 to 2021, 28% (7,307) of all dwelling units were singles, while 5% were semis (1,258), 8% were rows (2,044), and 59% (15,255) were apartments. These numbers are similar to those from 2021, which saw 25% singles, 5% semis, 5% rows, and 66% apartments.

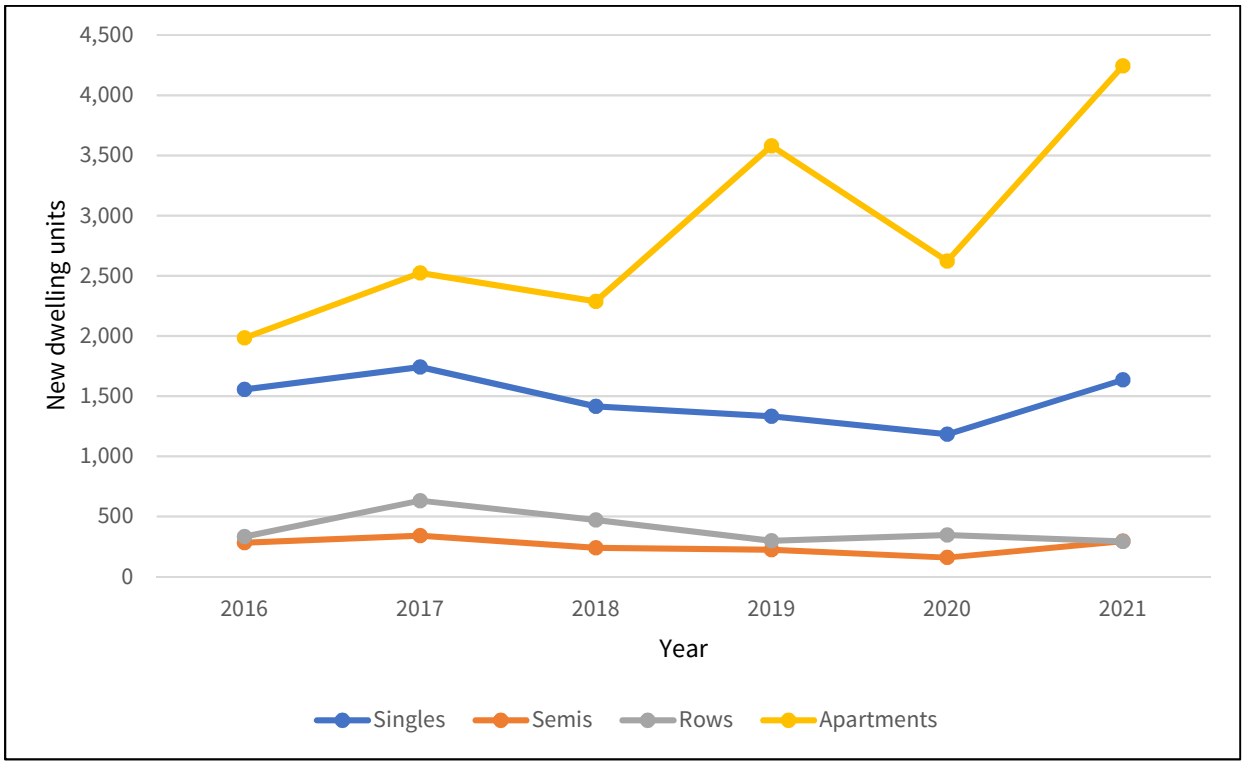

Figure 5-15: Change in residential dwelling types since 2016

Year	Singles		Semis		Rows		Apartments	
	No.	%	No.	%	No.	%	No.	%
2017	1,742	33	340	6	632	12	2,523	48
2018	1,415	32	239	5	472	11	2,286	52
2019	1,333	25	223	4	315	6	3,580	66
2020	1,183	27	159	4	347	8	822	61
2021	1,635	25	297	5	294	5	4,247	66
2017-21 total	7,307	28	1,258	5	2,044	8	15,255	59

Figure 5-16: Development activity by dwelling type, 2017-21

The chart below indicates the share, in percentage, of all dwelling units located in intensification and greenfield areas. For example, in 2021, 20% of all new single family detached units were located in intensification areas, while 62% of all rowhouses were located in greenfield areas. The chart compares the most recent year to the average of the last five years. These numbers illustrate the importance of greenfield areas in accommodating demand for ground-oriented dwelling units (single detached, semi-detached, and rowhouses) given the land requirements needed to accommodate these dwelling types.

Year	Category	Singles	Semis	Rows	Apartments
2021	Intensification	20	19	38	80
	Greenfield	79	81	62	20
2017-21 total	Intensification	22	13	30	75
	Greenfield	77	87	69	25

Figure 5-17: Share of all dwelling units (%) located in intensification and greenfield areas

5.4 Development Activity by Transit-Oriented Development

The following information details residential development permit activity in relation to the City's transit-oriented development objectives. The last three years have seen a strong increase in dwelling units in proximity to the City's rapid transit stations, while there is no apparent trend with regards to development activity in proximity to the planned Primary Transit Network as described in the *Winnipeg Transit Master Plan*.

	2017	2018	2019	2020	2021
400m of RT station	57	132	355	359	408
400m of Primary Transit Network	3,225	2,943	4,228	2,730	4,211

Figure 5-18: Permits issued for the construction of new residential dwelling units in proximity to TOD areas

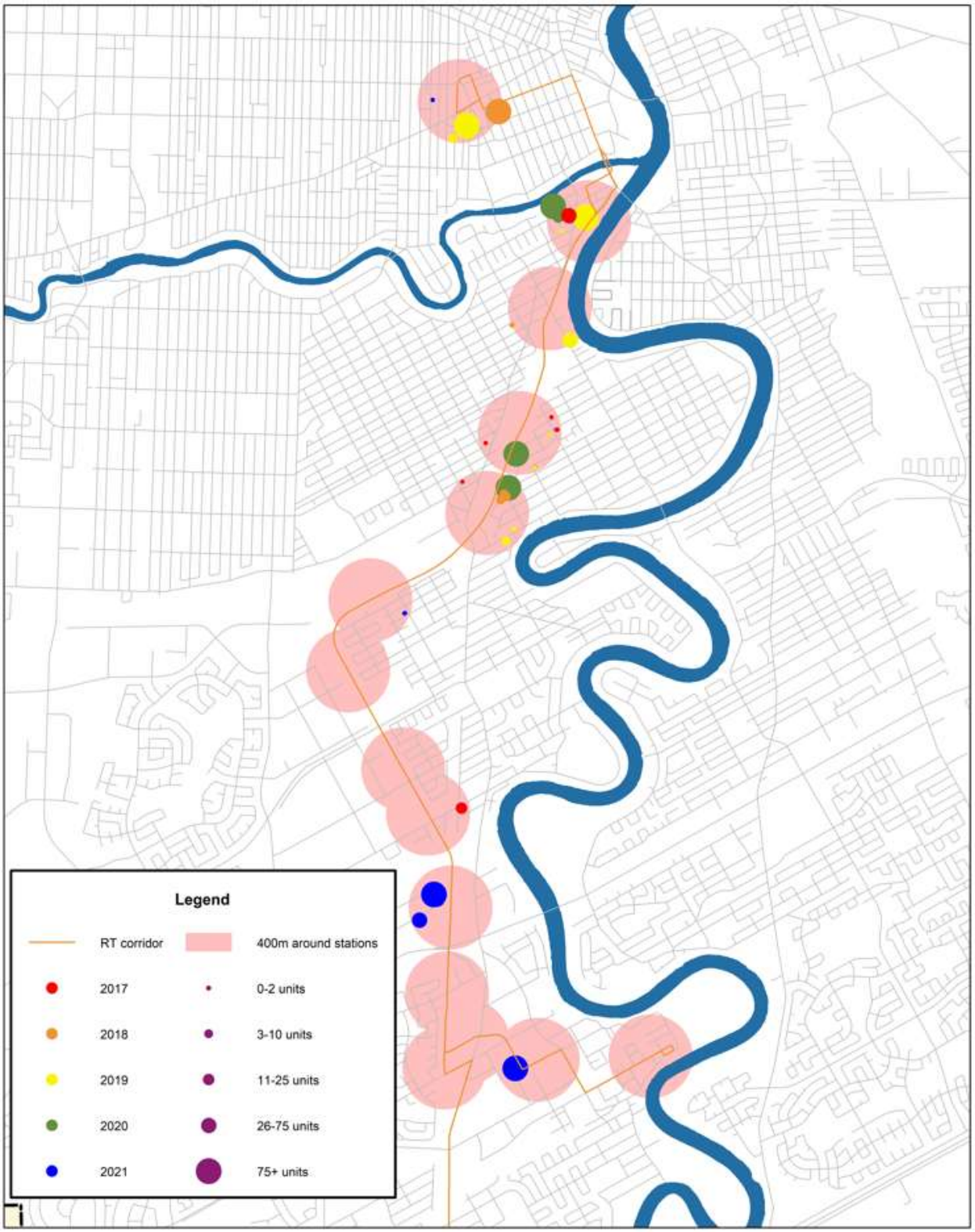

Figure 5-19: Permits issued for the construction of new residential dwelling units in proximity to rapid transit stations, 2017-21

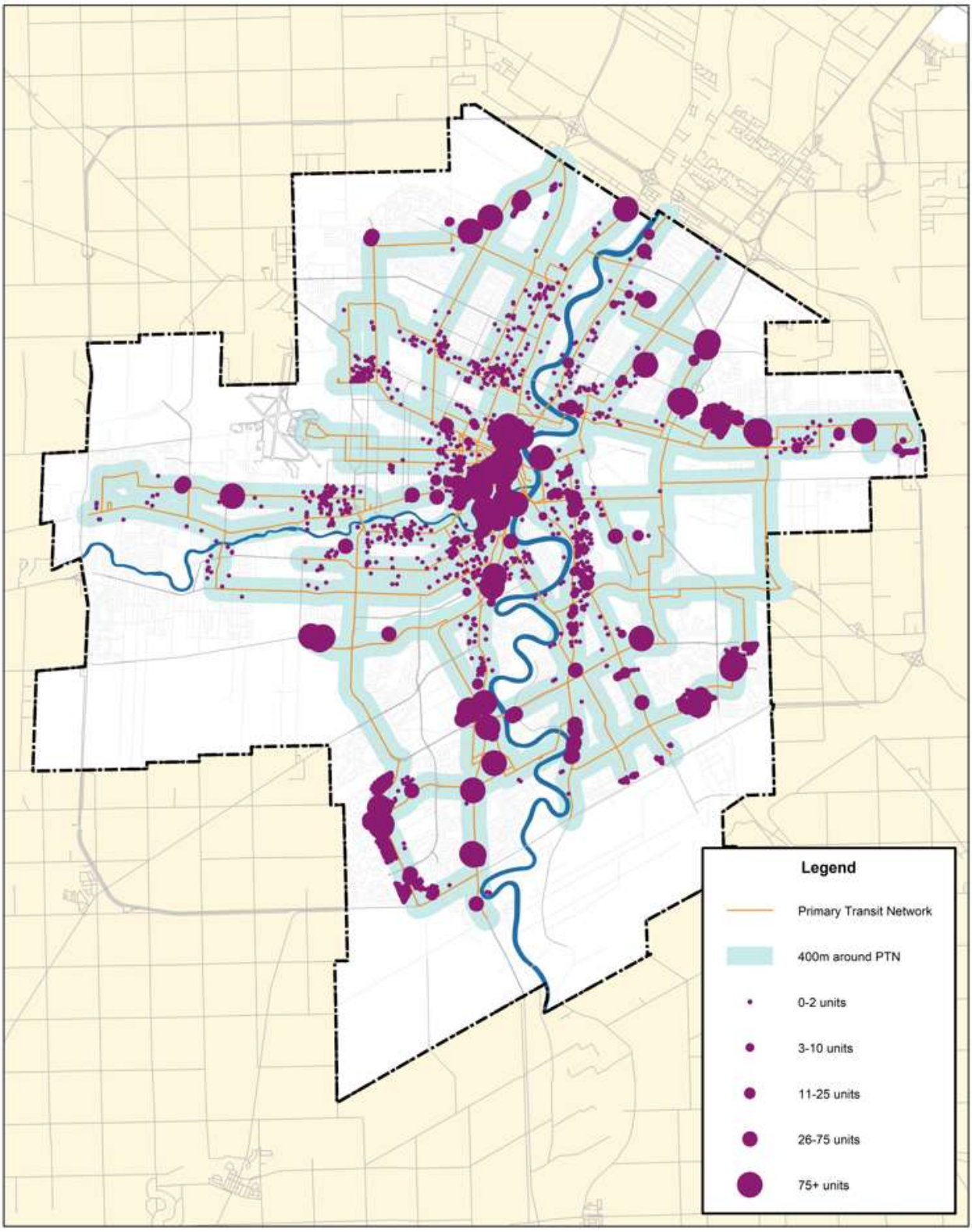

Figure 5-20: Permits issued for the construction of new residential dwelling units in proximity to the planned Primary Transit Network, 2017-21

The next table describes the nature of this development by dwelling type. Rapid transit station development is dominated by apartment dwelling units. While development activity in proximity to the planned Primary Transit Network has provided a wider range of dwelling types, it is also dominated by apartment dwelling types.

	Singles	Semis	Rows	Apts
400m of RT station	< 1%	< 1%	2.5%	96%
400m of Primary Transit Network	18%	2%	6%	74%

Figure 5-21: Permits issued for the construction of new residential dwelling units, 2017-21, by dwelling type share

5.5 Development Activity by Established Neighbourhoods

The following two charts indicate neighbourhoods within both the Mature and Recent Communities designations as per Complete Communities 2.0 having experienced the greatest amount of development activity from 2018 to 2021, as measured by permits issued for new residential units. In Mature Communities, the largest number of new residential dwelling units were built in the Kildonan Crossing neighbourhood, with 419 total dwelling units. The sum of this development occurred on only two properties – 839 and 865 Panet Rd, most of which occurred in 2019. Kildonan Crossing was followed by River-Osborne with 408 units, and West Broadway with 316.

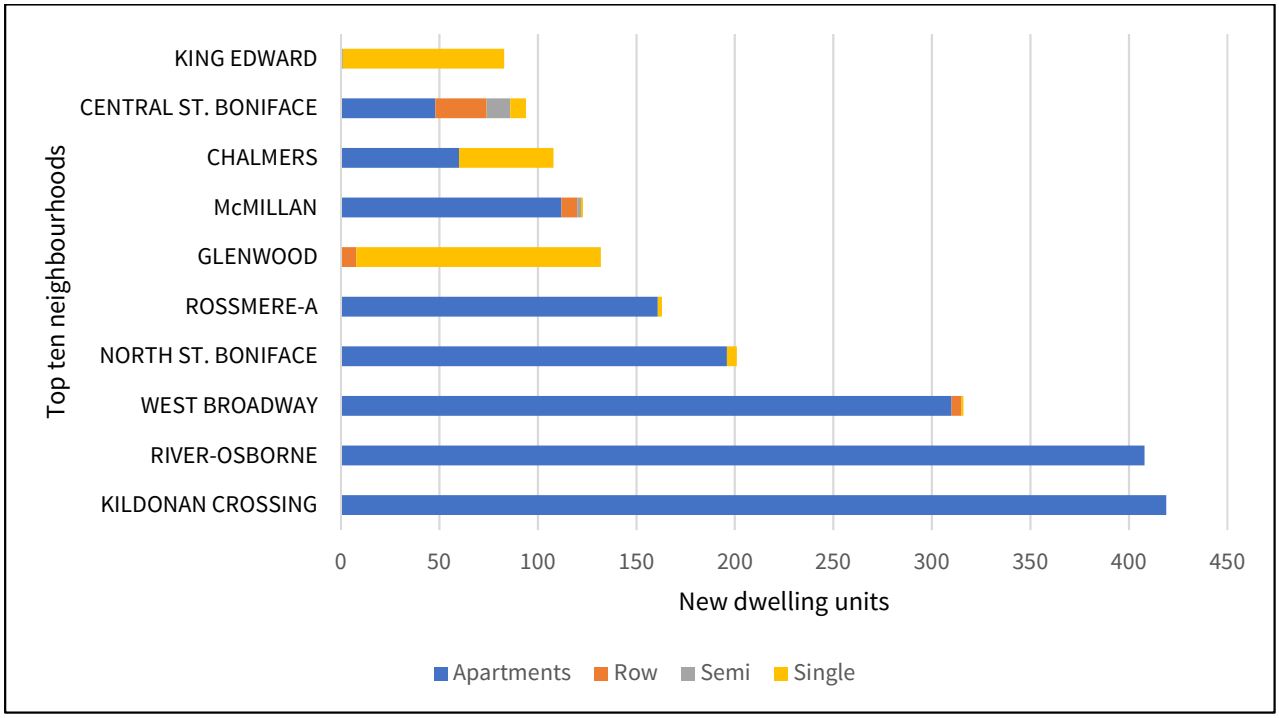

Figure 5-22: Mature Communities neighbourhoods having accommodated the largest number of new dwelling units, 2018-21

Between 2018 and 2021, the highest rates of new infill single-detached development in Mature Communities occurred in the Glenwood neighbourhood, followed by King Edward, Brooklands, Chalmers, and Sir John Franklin. New singles are worth noting given their relatively large number (as opposed to semi-detached and rowhouse dwellings), and their distinction from total units in Figure 5-22 above, which is largely driven by new apartment units.

Neighbourhood	New dwelling units
Glenwood	124
King Edward	82
Brooklands	64
Chalmers	48
Sir John Franklin	39
Jefferson	36
Burrows Central	35
William Whyte	34
Weston	29
Maybank	27

Figure 5-23: New single-detached infill units by Mature Communities neighbourhood, 2018-21, top ten

In Recent Communities, Eaglemere accommodated the largest number of new dwelling units with 483, most of which were located on the east side of Molson St, north of Grassie Blvd. Eaglemere was followed by Tuxedo Industrial with 218, and River Park South with 198.

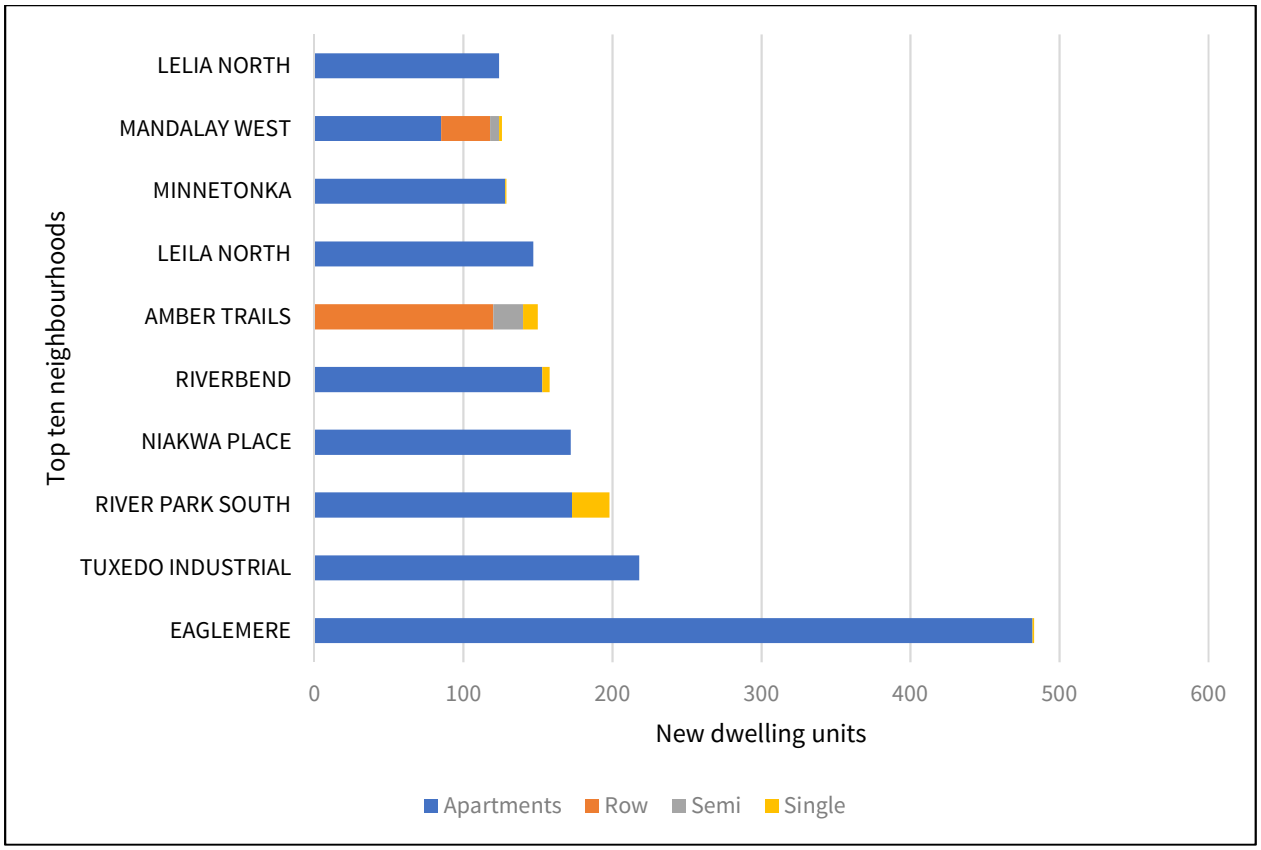

Figure 5-24: Recent Communities neighbourhoods having accommodated the largest number of new dwelling units, 2018-21

5.6 Development Activity by Greenfield Area

The chart below illustrates the magnitude of development activity of major greenfield sites, illustrating the course of their build-outs. A map of existing greenfield sites can be found in Section 6.4 of this report.

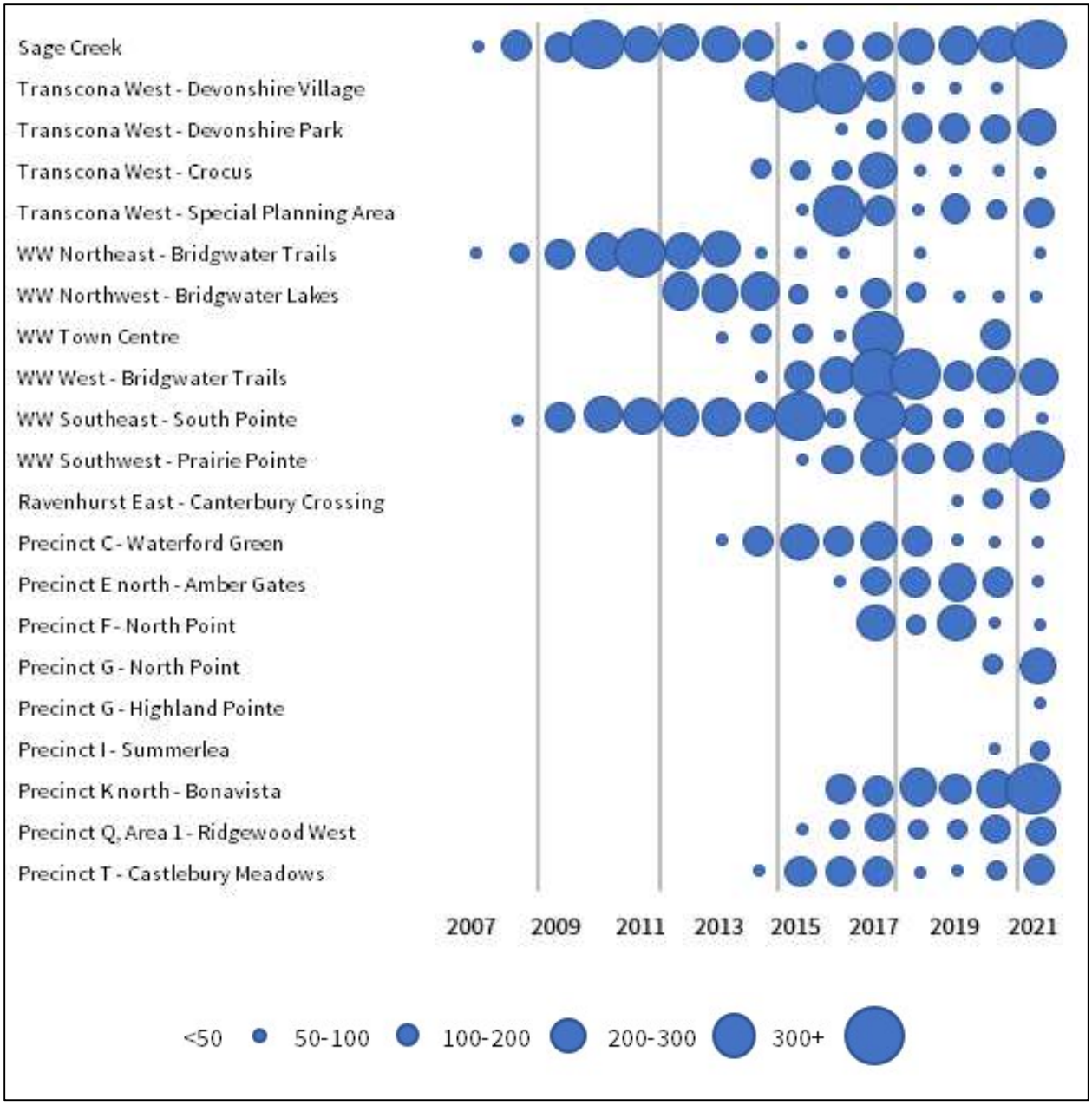

Figure 5-25: Magnitude of permits issued for new dwelling units by year, major greenfield sites

The chart below illustrates permits issued for the construction of new residential dwelling units, by dwelling type, in 2021. Section 4.2.4 provides additional detail on total and remaining capacity by site.

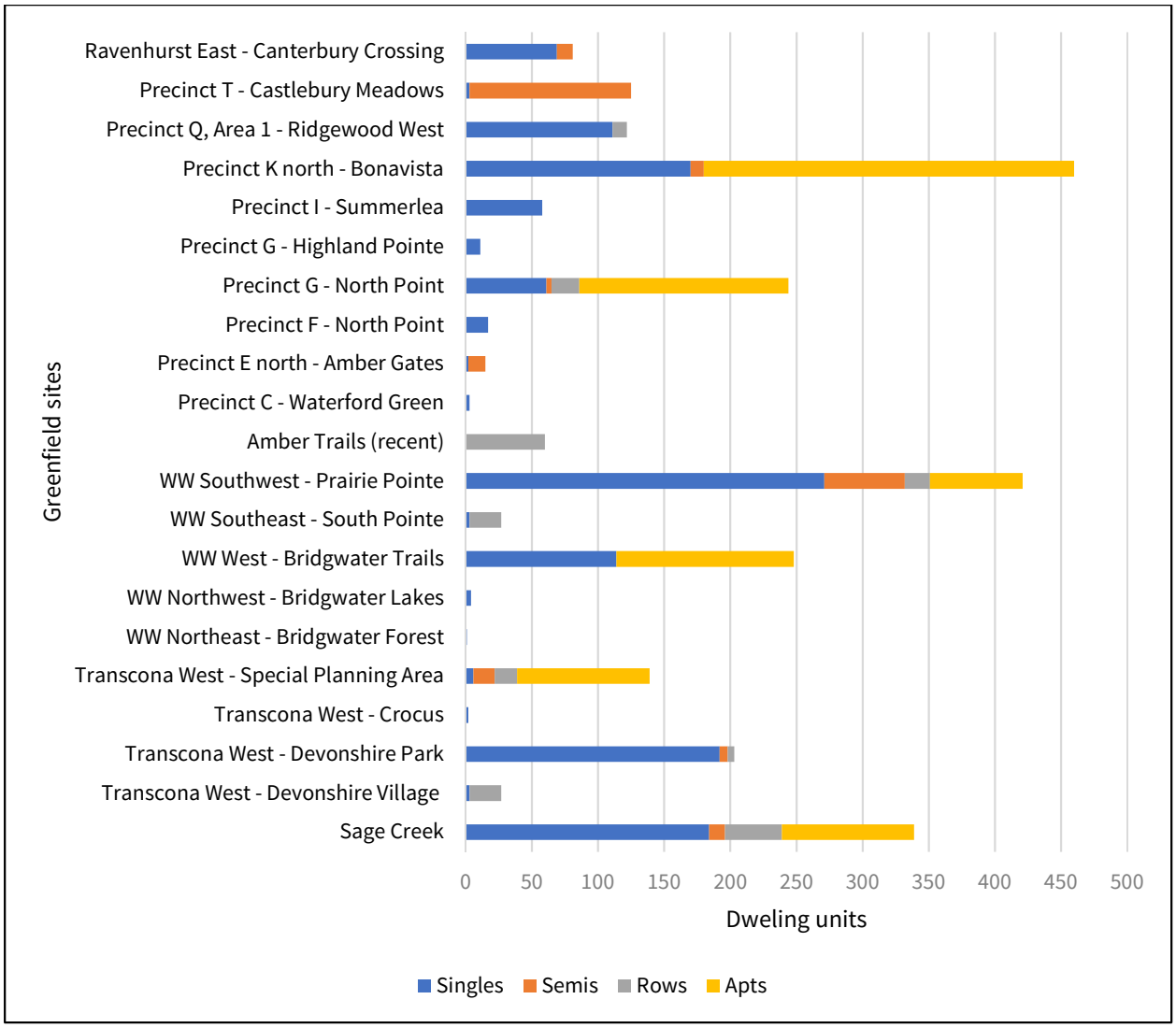

Figure 5-26: Greenfield dwelling units, 2021, by site and dwelling unit type

5.7 Secondary Suites

Dwelling units cited and summarized in this report only include primary dwellings and do not include accessory units such as secondary suites. However, given their increasing prevalence, they nonetheless warrant standalone attention.

Over the last decade, Council has made changes to its zoning by-law to facilitate the construction of secondary suites. On February 27, 2013, it expanded the definition of secondary suites to allow for detached units in addition to attached suites through Conditional Use applications. Then, on January 25, 2017, it allowed for attached secondary suites as a permitted use. Consequently, these changes generated significant development activity, increasing from seven per year to as high as 180 per year in 2021.

Year	No.
2012	7
2013	7
2014	11
2015	29
2016	55
2017	79
2018	91
2019	117
2020	90
2021	180
Total	666

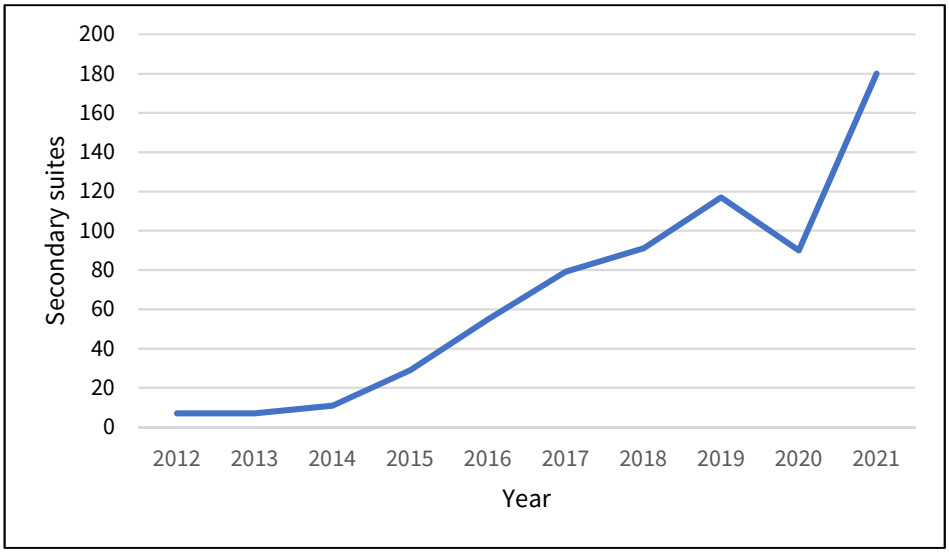

Figure 5-27: Permits issued for the construction of secondary suites, 2012 to 2021

New secondary suites are predominantly being built in existing neighbourhoods, particularly in Mature Communities. Figure 5-28 below shows their distribution by *Complete Communities 2.0* Urban Structure; from 2012 to 2021, 96% were built in Established Neighbourhoods, and 85% in Mature Communities. Only a small amount of new secondary suites were built in greenfield areas (captured as Emerging and New Communities in the table below).

Urban Structure designation	2012-2021	
	No.	%
Downtown	0	0
Major Redevelopment Sites	6	1
Corridor frontage	1	< 1
Urban Corridors	0	0
Regional Corridors	1	< 1
Emerging Communities	18	3
New Communities	0	0
Rural Agricultural	4	< 1
Established Neighbourhoods	637	96
Mature Communities	567	85
Recent Communities	70	11
Total	666	

Figure 5-28: Permits issued for the construction of secondary suites, 2012 to 2021, by Complete Communities 2.0 Urban Structure

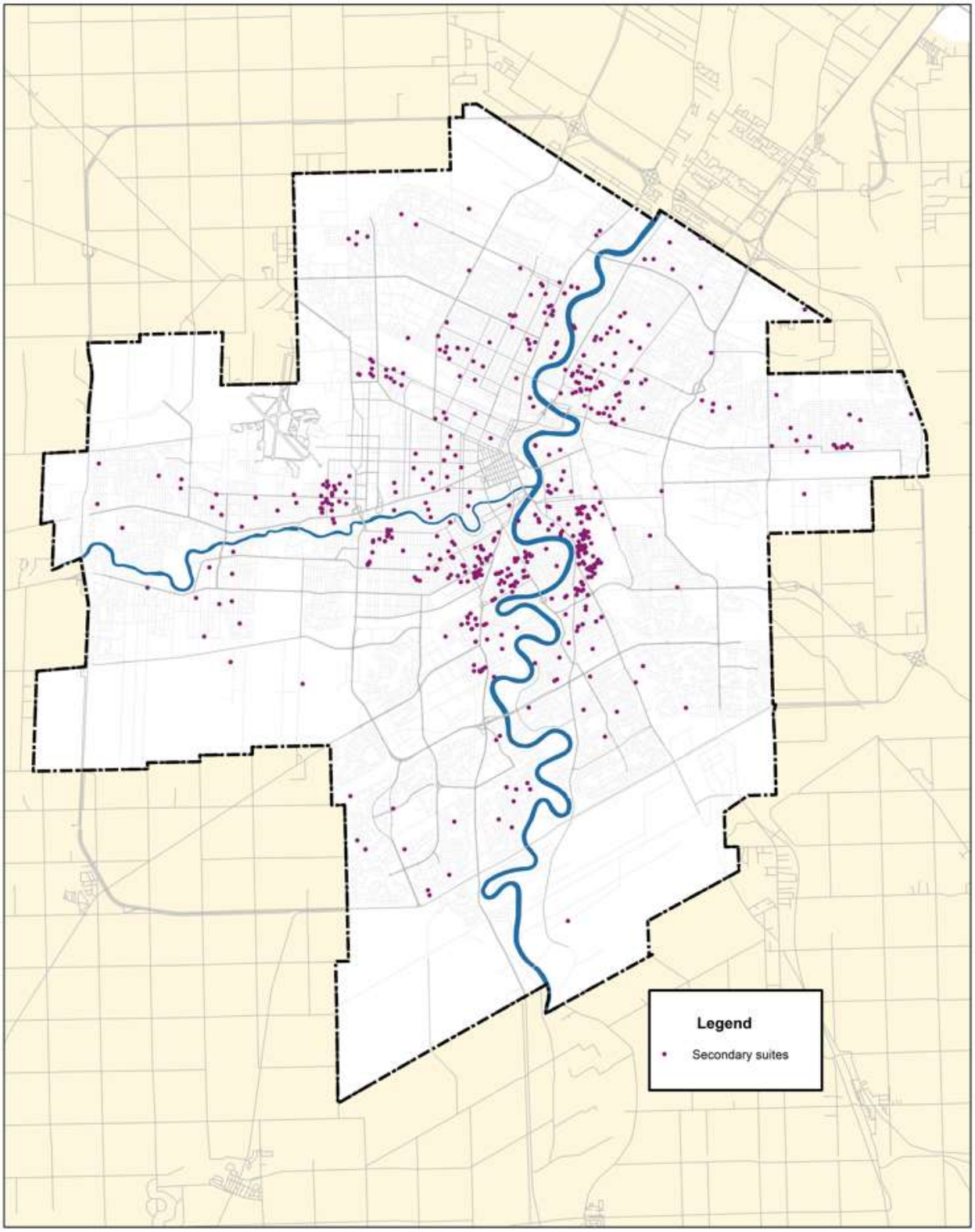

Figure 5-29: Permits issued for the construction of new secondary suites, 2012 to 2021

5.8 Residential Demolitions

It is important to emphasize that the residential development activity described in this section are gross totals and do not account for the removal of existing units in developing new ones. As a result, it is important to understand residential demolitions.

In order to analyze residential demolitions, a geographic framework was established based on the Area 1 and Area 2 neighbourhoods used in the City's Small-Scale and Low-Rise Residential Development Guidelines for Mature Communities. This framework includes Infill Areas 1 and 2, as well as Recent Communities. This distinction was necessary to generalize the scale of resulting development arising from a demolition. Over the last 10 years, the City saw an annual average of 83 dwelling units lost in Infill Area 1, 188 units lost in Infill Area 2, and 30 units in Recent Communities.

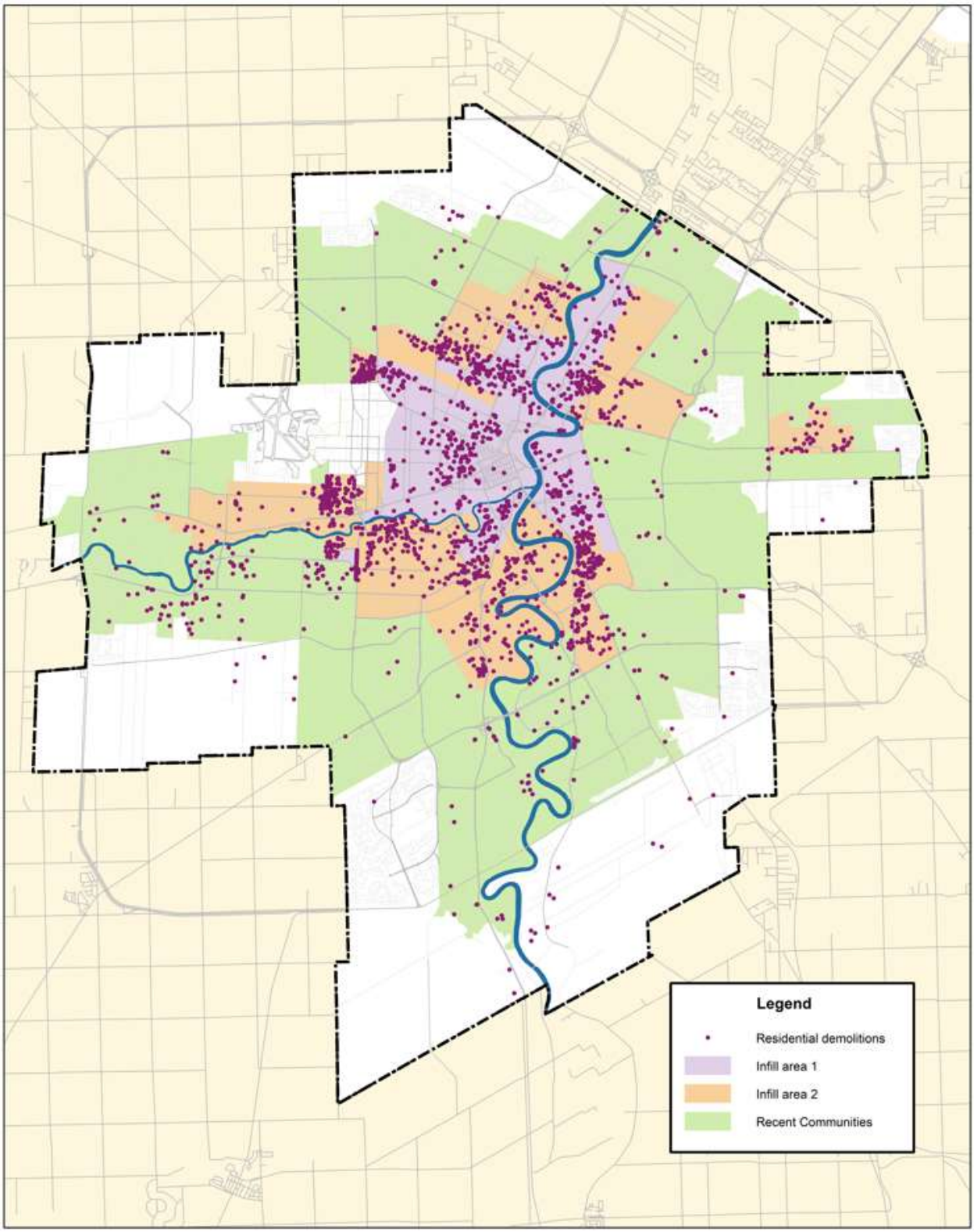

Figure 5-30: Map of residential demolitions, 2012 to 2021

Within each of these categories, the number of new dwelling units created was compared to the number of units lost to understand the relationship between the two. As Figure 5-31 describes, over the last decade Infill Area 1 sees an average of 7.9 new units created for every unit lost, Infill Area 2 sees an average of 4.1 new units created for every unit lost, and Recent Communities sees 36.2 new units created for every unit lost. Lower figures are attributable to Infill Areas 1 and 2 given the higher frequencies of demolitions in these areas, while Area 1 sees a higher ratio given that redevelopments are more likely to have a greater number of dwelling units. Recent Communities have a much higher number because demolitions are far less frequent – rather, new development tends to be characterized as larger apartment developments on underutilized land.

Year	Infill Area 1			Infill Area 2			Recent Communities		
	Units created	Units lost	Units created/ lost	Units created	Units lost	Units created/ lost	Units created	Units lost	Units created/ lost
2012	301	66	4.6	527	84	6.3	859	20	43.0
2013	285	62	4.6	223	83	2.7	1,001	36	27.8
2014	768	62	12.4	471	90	5.2	1,693	33	51.3
2015	642	76	8.4	290	106	2.7	842	61	13.8
2016	604	68	8.9	358	114	3.1	880	21	41.9
2017	619	60	10.3	331	142	2.3	579	27	21.4
2018	952	103	9.2	484	133	3.6	854	28	30.5
2019	943	100	9.4	741	146	5.1	1,618	21	77.0
2020	458	159	2.9	713	118	6.0	591	31	19.1
2021	1,106	78	14.2	481	167	2.9	2,299	25	92.0
Avg.		**83**	**7.9**		**118**	**4.1**		**30**	**36.2**

Figure 5-31: Dwelling units created vs dwelling units lost, 2012 to 2021

6.0 Greenfield Residential Land Supply

6.1 Supply by Targets

The General Growth section of *Complete Communities 2.0* prescribes a number of greenfield land supply targets. These targets are intended to inform the timing of precinct planning[1] and City-funded growth-enabling infrastructure. These targets, along with the City's existing supplies, are noted in Figure 6-1 below and are accurate as of January 1, 2022.

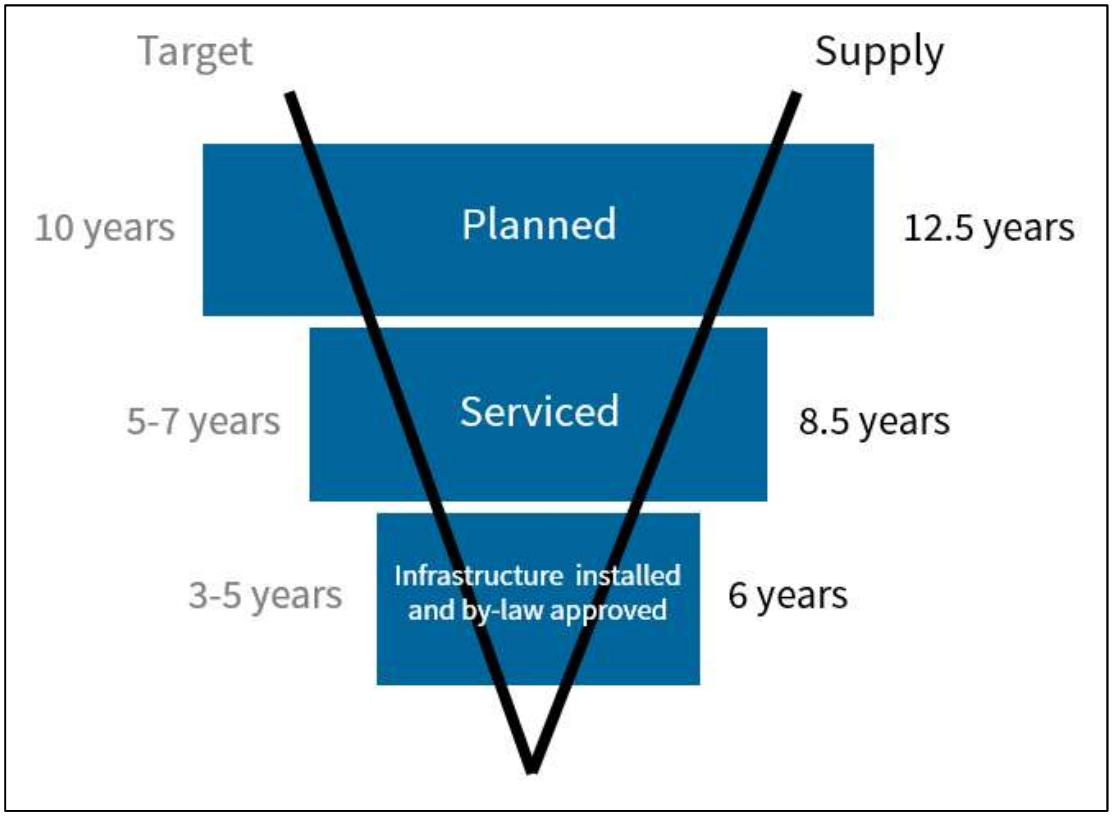

Figure 6-1: City of Winnipeg residential greenfield land supplies in relation to *Complete Communities 2.0* targets, as of January 1, 2022

All told, the City of Winnipeg currently has a healthy supply of vacant greenfield land, with its supplies exceeding all *Complete Communities'* targets. The timing of precinct planning processes and growth-enabling infrastructure is not immediately urgent, however, Council will need to continue to invest in these items as appropriate in order to maintain this healthy supply.

As described in Section 4.1.2 of this report, years supply is determined by dividing total land supply by forecasted annual greenfield land demand. The estimated supplies above generally assume 50% of future residential units will be accommodated in greenfield areas, in concert

[1] Precinct plans are secondary plans that apply to areas designated as New Communities in Complete Communities 2.0. Their key role is to ensure that future development is comprehensive, orderly, and complete. They are a prerequisite to development.

with *Complete Communities'* 50% intensification target. If recent trends continue and higher rates of intensification are achieved, the above-described supplies likely underestimate its years' supply. Conversely, if higher rates of greenfield development occur, the City would likely exhaust its supply sooner. Additional supply would also be gained if future greenfield development builds out to higher densities than planned. It is important to consider different demand and supply scenarios to promote resiliency in the face of changing conditions.

Section	Target	Supplies at varying levels of intensification, Standard supply scenario		
		40%	50%	60%
4.2	Maintain approximately a 10-year supply of planned greenfield land to support a well-functioning, competitive land market throughout the City and to manage competing demands for City local area planning resources and growth-supportive infrastructure	10.5 years	12.5 years	15 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land	7 years	8.5 years	10 years
4.1.1	Maintain a three- to five-year supply of vacant serviced greenfield land where all growth-enabling infrastructure is installed and the subdivision by-law is approved.	5 years	6 years	7.5 years

Figure 6-2: Land supply estimates and shares of infill development, Standard supply scenario

Section	Target	Supplies at varying levels of intensification, Alternative Higher supply scenario[1]		
		40%	50%	60%
4.2	Maintain approximately a 10-year supply of planned greenfield land to support a well-functioning, competitive land market throughout the City and to manage competing demands for City local area planning resources and growth-supportive infrastructure	12.5 years	14.5 years	17.5 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land	8.5 years	9.5 years	11.5 years
4.1.1	Maintain a three- to five-year supply of vacant serviced greenfield land where all growth-enabling infrastructure is installed and the subdivision by-law is approved.	6 years	7 years	8.5 years

Figure 6-3: Land supply estimates and shares of infill development, Alternative Higher supply scenario

[1] The Alternative Higher supply scenario assumes 15% of a greenfield site's remaining inventory of single-detached dwellings will instead be developing to a mix of semi-detached and rowhouse dwellings, and planned apartment sites would be developed to higher densities. See Step 2 in Section 4.1.2 for more information.

While it is important to maintain a healthy supply to accommodate forecasted demand, particularly for ground-oriented dwelling units that are difficult to accommodate at a large scale in infill areas, it is also important to manage against excessive supply. Doing so will help manage competing demands for limited City-funded growth-enabling and -supportive infrastructure, planning resources, and City operating costs.

Some additional notes on these land supply figures:

- "Planned" greenfield land is land where a growth-enabling secondary plan has been approved by Council or where none is required.
- "Vacant serviced" greenfield land is land where Council has approved funding for all growth-enabling infrastructure.
- These figures are not exclusive of each other – there is overlap between these land supplies. Vacant land that is planned may also be serviced, and may also have all growth-enabling infrastructure installed and the subdivision by-law approved[1].

6.2 Supply by Greenfield Phasing

The General Growth section of *Complete Communities 2.0* prescribes policies to guide the sequencing of timely capital infrastructure and local area plans[2] to enable and support the full build-out of future greenfield lands in accordance with the following prioritization:

1. Existing serviced
2. Short-to-medium term lands
    a. Tier 1 lands
    b. Tier 2 lands
    c. Tier 3 lands
    d. Tier 4 lands
3. Long-term lands
    a. Tier 1 lands
    b. Tier 2 lands

[1] Following Council approval, applicants may be responsible to fulfill conditions prior to obtaining final approval and plan registration. These may include submission of legal plan mylars for bylaw preparation and Council enactment, payment of fees (including cash in lieu of land dedication), construction of municipal services such as roads and water mains, and entering into a development agreement.

[2] "Local area plans" refer to a wide range of planning tools, including but not limited to secondary plans, background studies, and design guidelines. They address issues and concerns of a portion of the city, ranging in scale from dozens to thousands of acres. In this case, this refers to the need to undertake a precinct plan (or sector plan, where applicable) as a prerequisite to development in New Communities.

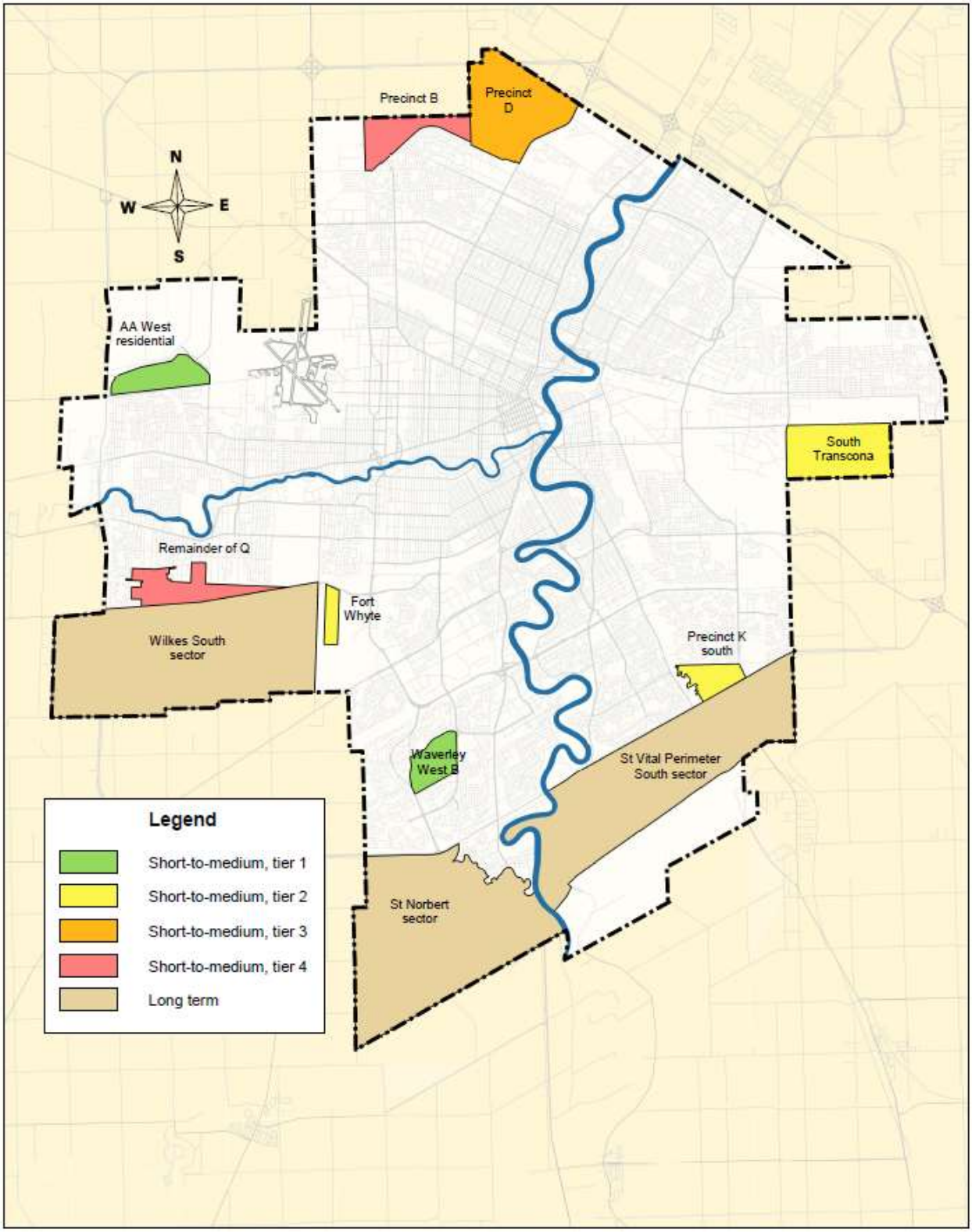

Figure 6-4: Map of greenfield phasing, *Complete Communities 2.0*

The tables below quantify the City's greenfield land supplies with *Complete Communities 2.0*'s phasing policies under both the Standard and Alternative Higher supply scenarios:

Tiers	Years supply		
	60% greenfield	50% greenfield	40% greenfield
Existing planned and serviced	7 years	8.5 years	10 years
Short-to-medium term lands	9.5 years	11.5 years	13.5 years
Long term lands	26 years	30.5 years	36.5 years
Total potential land supply	42.5 years	50 years	60 years

Figure 6-5: Years supply by Complete Communities 2.0 greenfield phasing, Standard supply scenario

Tiers	Years supply		
	60% greenfield	50% greenfield	40% greenfield
Existing planned and serviced	8.5 years	9.5 years	11.5 years
Short-to-medium term lands	11 years	12.5 years	15.5 years
Long term lands	29 years	34 years	40.5 years
Total potential land supply	48 years	56.5 years	67.5 years

Figure 6-6: Years supply by *Complete Communities 2.0* greenfield phasing, Alternative Higher supply scenario

6.3 Supply by Dwelling Types

The table below details the estimated supply of potential remaining greenfield dwelling units[1], by dwelling type. These numbers are the sum total of the supply figures by site described in Section 6.4 below.

Category	Supply scenario	Singles	Semis	Rows	Total G.O.[2]	Apts	Total
Planned and serviced	Standard	6,890	2,200	3,020	12,110	7,360	19,380
	Alt. Higher	5,870	3,390	4,040	13,310	9,670	22,980
Planned, but unserviced	Standard	4,900	1,090	1,530	7,520	2,440	9,960
	Alt. Higher	4,250	1,910	2,160	8,310	3,010	11,320
Unplanned	Standard	42,520	9,030	11,620	63,160	30,670	93,830
	Alt. Higher	36,140	16,870	17,290	70,302	37,730	108,030

Figure 6-7: Total greenfield residential supply, by dwelling type

[1] Figures rounded.

[2] Ground-oriented dwelling units, or the sum total of singles, semis, and rows.

6.4 Supply by Site

The following charts describe the City's residential greenfield supply by site, noting individual sites that comprise the City's inventory. These sites are identified in Figure 6-8 below. These lists exclude sites that can be considered to be built-out. Recently completed greenfield sites include Amber Trails, Waverley West Northeast (Bridgwater Forest), and Waterside Estates.

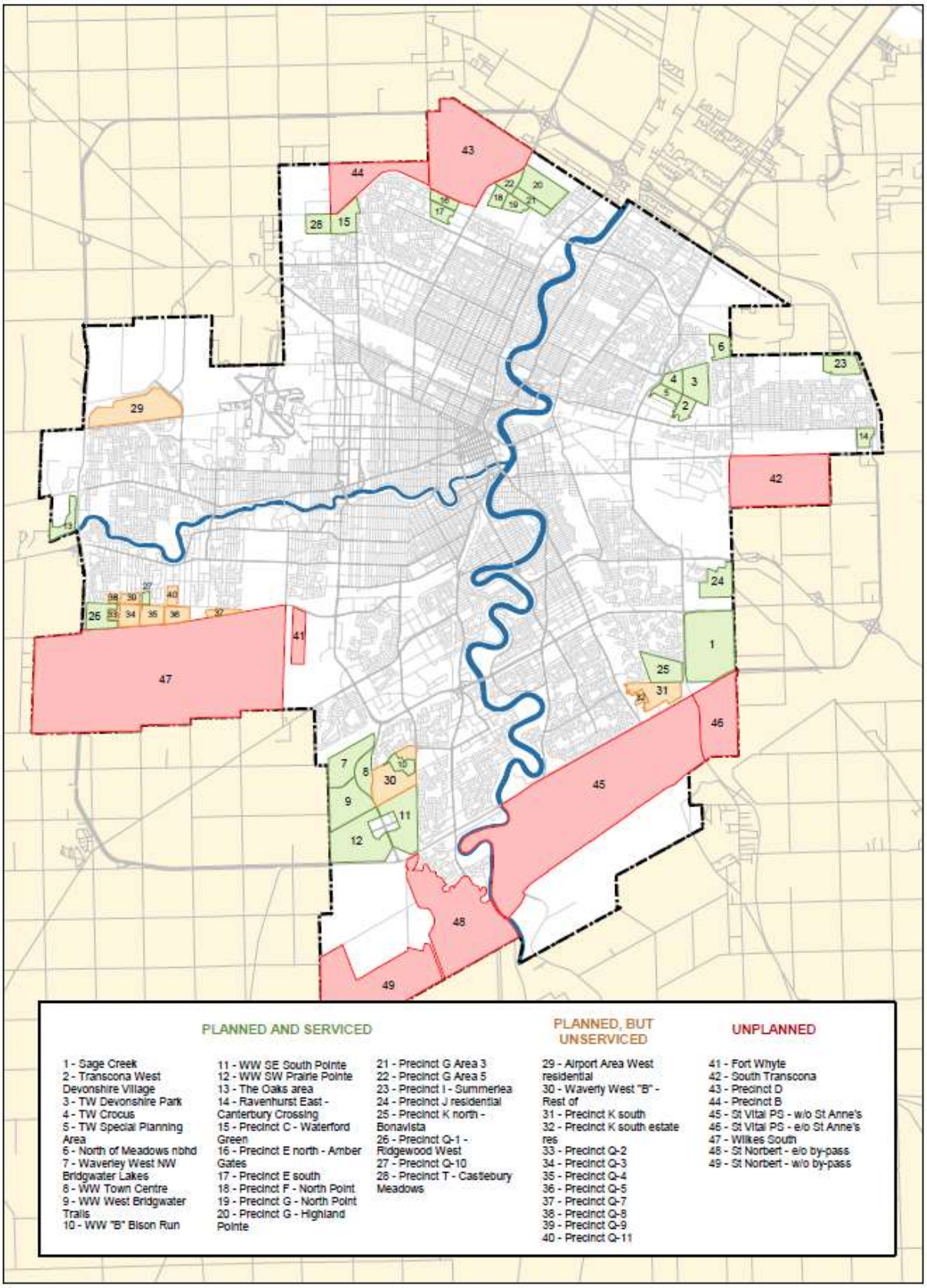

Figure 6-8: Greenfield supply, by site

The first chart notes those that are considered to be planned and serviced and includes units built to-date. Sites that are planned but unserviced as well as sites that are unplanned are excluded from this first table because development has yet to occur.

Greenfield sites	Units built to-date				
	Singles	Semis	Rows	Apts	Total
Sage Creek	1,960	20	200	910	3,090
Transcona West – Devonshire Village	320	60	200	480	1,060
Transcona West – Devonshire Park	540	60	60	0	660
Transcona West – Crocus	250	90	0	230	570
Transcona West – Special Planning Area	110	110	80	490	790
North of Meadows neighbourhood	0	0	0	0	0
WW Northwest – Bridgwater Lakes	1,190	0	0	0	1,190
WW Town Centre	0	130	250	370	750
WW West – Bridgwater Trails	1,000	260	60	590	1,910
WW B – Bison Run	0	0	0	0	0
WW Southeast – South Pointe	1,390	0	600	480	2,470
WW Southwest – Prairie Pointe	790	160	80	270	1,300
The Oaks area	200	0	0	0	0
Ravenhurst East – Canterbury Crossing	130	20	0	0	150
Precinct C – Waterford Green	610	120	90	190	1,010
Precinct E north – Amber Gates	310	40	0	360	710
Precinct E south	0	0	0	0	0
Precinct F – North Point	170	110	60	350	690
Precinct G – North Point	110	50	30	160	350
Precinct G – Highland Pointe	10	0	0	0	10
Precinct G – Area 3	0	0	0	0	0
Precinct G – Area 5 (triangle)	0	0	0	0	0
Precinct I – Summerlea	60	0	0	0	60
Precinct J residential	0	0	0	0	0
Precinct K north – Bonavista	780	30	70	480	1,360
Precinct Q, Area 1 – Ridgewood West	590	0	20	0	610
Precinct Q, Area 10	70	0	0	0	70
Precinct T – Castlebury Meadows	240	290	90	40	660
Planned and serviced total	10,590	1,260	1,800	5,360	18,450

Figure 6-9: Units built to-date in the City's greenfield residential land inventory

The next two charts describe estimated potential total units using the Standard and Alternative higher supply scenarios.

Greenfield sites	Estimated potential total units					% completion			Potential remaining units					
	Singles	Semis	Rows	Apts	Total	G.O.	Apts	Total	Singles	Semis	Rows	G.O.	Apts	Total
PLANNED AND SERVICED														
Sage Creek	2,710	80	1,070	1,250	5,110	57	73	61	750	60	870	1,680	340	2,020
TW – Devonshire Village	240	70	260	480	1,050	100	100	100	0	10	50	60	0	60
TW – Devonshire Park	1,110	90	160	290	1,650	48	0	40	570	30	100	700	290	990
TW – Crocus	260	140	0	230	690	87	100	92	10	50	0	60	0	60
TW – Special Planning Area	130	140	80	880	1,230	86	56	64	30	30	0	60	390	450
North of Meadows nbhd	330	70	90	240	740	0	0	0	330	70	90	500	240	740
WW NW – Bridgwater Lakes	1,230	0	0	0	1,230	97	0	97	40	0	0	40	0	40
WW Town Centre	0	130	250	740	1,120	100	49	66	0	10	0	10	380	390
WW W – Bridgwater Trails	1,040	270	0	1,280	2,590	99	46	74	40	10	0	50	690	740
WW B – Bison Run	140	10	140	400	690	0	0	0	140	10	140	290	400	690
WW SE – South Pointe	1,410	0	570	410	2,390	99	100	100	20	0	0	20	0	20
WW SW – Prairie Pointe	2,270	960	210	480	3,920	30	57	33	1,480	800	130	2,410	210	2,620
The Oaks area	210	110	0	0	320	63	0	0	10	110	0	120	0	120
Ravenhurst East – Canterbury Crossing	270	70	0	110	450	43	0	33	150	50	0	200	110	310
Pr. C – Waterford Green	660	170	150	190	1,170	83	100	86	50	50	70	170	0	170
Pr. E north – Amber Gates	310	30	0	550	890	100	65	80	0	0	0	0	190	190
Pr. E south	30	0	240	580	850	0	0	0	30	0	240	270	580	850
Pr. F – North Point	160	120	50	430	760	100	82	92	0	0	0	0	80	80
Pr. G – North Point	260	80	170	250	760	37	63	0	150	30	140	320	90	410
Pr. G – Highland Pointe	1,230	380	380	770	2,750	0	0	0	1,220	380	380	1,980	770	2,740
Pr. G – Area 3	340	70	90	250	750	0	0	0	340	70	90		250	750
Pr. G – Area 5 (triangle)	160	30	40	120	350	0	0	0	160	30	40		120	350
Pr. I – Summerlea	700	160	240	0	1,100	5	0	5	640	160	240	1,040	0	1,040
Pr. J residential	440	120	280	1,580	2,420	0	0	0	440	120	280	840	1,580	2,420
Pr. K north – Bonavista	760	90	140	1,010	2,000	90	47	69	0	60	60	120	530	650
Pr. Q-1 – Ridgewood West	820	40	60	0	920	67	0	67	230	40	40	310	0	310
Pr. Q-10	90	0	0	0	90	85	0	85	10	0	0	10	0	10
Pr. T – Castlebury Meadow	320	310	150	190	970	79	19	68	80	20	60	160	150	310
Planned and serviced total	**17,590**	**3,730**	**4,810**	**12,690**	**38,820**	**n/a**			**6,900**	**2,200**	**3,030**	**12,130**	**7,380**	**19,410**
PLANNED, BUT UNSERVICED														
AA West residential	1,770	380	480	1,280	3,900	n/a			1,770	380	480	2,920	1,280	3,900
WW B – Rest of	910	190	250	650	1,980				910	190	250	1,510	650	1,980

Greenfield sites	Estimated potential total units					% completion			Potential remaining units					
	Singls	Semis	Rows	Apts	Total	G.O.	Apts	Total	Singles	Semis	Rows	G.O.	Apts	Total
Pr. K south	721	150	200	520	1,590				721	150	200	1,190	520	1,590
Pr. K south estate res	40	0	0	0	40				40	0	0	40	0	40
Pr. Q-2	90	0	0	0	90				90	0	0	90	0	90
Pr. Q-3	290	120	200	0	610				290	120	200	610	0	610
Pr. Q-4	290	120	200	0	610				290	120	200	610	0	610
Pr. Q-5	260	100	180	0	540				260	100	180	540	0	540
Pr. Q-7	70	30	50	0	150				70	30	50	150	0	150
Pr. Q-8	70	0	0	0	70				70	0	0	70	0	70
Pr. Q-9	190	0	0	0	190				190	0	0	190	0	190
Pr. Q-11	190	0	0	0	190				190	0	0	190	0	190
Planned but unserviced total	**4,900**	**1,090**	**1,530**	**2,440**	**9,950**				**4,900**	**1,090**	**1,530**	**7,520**	**2,440**	**9,950**
UNPLANNED														
Fort Whyte	600	130	170	440	1,330				600	130	170	900	440	1,330
South Transcona	2,100	450	570	1,510	4,630				2,100	450	570	3,110	1,510	4,630
Precinct D	4,870	1,033	1,330	3,510	10,750				4,870	1,033	1,330	7,230	3,510	10,750
Precinct B	1,650	350	450	1,190	3,650				1,650	350	450	2,460	1,190	3,650
St. Vital PS – w/o St Anne's	5,770	1,220	1,580	4,160	12,730				5,770	1,220	1,580	8,570	4,160	12,730
St. Vital PS – e/o St Anne's	1,810	380	490	1,300	3,990	n/a			1,810	380	490	2,680	1,300	3,990
Wilkes South	16,680	3,540	4,560	12,040	36,820				16,680	3,540	4,560	24,780	12,040	36,820
St. Norbert – e/o by-pass	3,280	700	900	2,370	7,240				3,280	700	900	4,870	2,370	7,240
St. Norbert – w/o by-pass	5,760	1,220	1,570	4,160	12,720				5,760	1,220	1,570	8,560	4,160	12,720
Unplanned total	**42,520**	**9,030**	**11,620**	**30,670**	**93,830**				**42,520**	**9,030**	**11,620**	**63,160**	**30,670**	**93,830**

Figure 6-10: Estimated potential total and remaining units by site, Standard supply scenario

Greenfield sites	Estimated potential total units					% completion			Potential remaining units					
	Singles	Semis	Rows	Apts	Total	G.O.	Apts	Total	Singles	Semis	Rows	G.O.	Apts	Total
PLANNED AND SERVICED														
Sage Creek	2,590	220	1,160	1,350	5,320	55	68	58	630	200	960	1,790	400	2,230
TW – Devonshire Village	210	70	330	480	1,090	95	100	97	0	10	130	140	0	140
TW – Devonshire Park	1,020	190	240	350	1,800	45	0	36	480	140	180	800	350	1,150
TW – Crocus	250	140	0	230	620	88	100	93	0	50	0	50	0	50
TW – Special Planning Area	130	140	80	1,040	1,390	85	47	57	20	30	0	50	550	600
North of Meadows nbhd	280	130	140	300	850	0	0	0	280	130	140	550	300	850
WW NW – Bridgwater Lakes	1,230	0	0	0	1,230	97	n/a	97	40	0	0	40	0	40
WW Town Centre	0	130	250	910	1,290	100	40	58	0	10	0	10	540	550
WW W – Bridgwater Trails	1,040	270	0	1,640	2,950	100	36	65	40	10	0	50	1,050	1,100
WW B – Bison Run	120	40	160	510	830	0	0	0	120	40	160	320	510	830
WW SE – South Pointe	1,410	0	570	410	2,390	100	100	100	20	0	0	20	0	20
WW SW – Prairie Pointe	2,050	1,240	410	610	4,310	28	45	30	1,250	1,070	330	2,650	340	2,990
The Oaks area	210	110	0	0	320	62	n/a	62	10	110	0	120	0	120
Ravenhurst East – Canterbury Crossing	250	100	20	130	500	40	0	30	130	80	20	230	130	360
Pr. C – Waterford Green	650	180	160	190	1,180	82	99	85	40	60	70	170	0	170
Pr. E north – Amber Gates	310	30	0	630	970	100	56	72	0	0	0	0	270	270
Pr. E south	30	10	240	750	1,030	0	0	0	30	10	240	280	750	1,030
Pr. F – North Point	160	120	50	450	780	100	79	89	0	0	0	0	90	90
Pr. G – North Point	230	110	190	360	890	35	44	38	130	60	160	350	200	550
Pr. G – Highland Pointe	1,050	600	540	840	3,030	0	0	0	1,040	600	540	2,180	840	3,020
Pr. G – Area 3	290	140	140	300	870	0	0	0	290	140	140	560	300	870
Pr. G – Area 5 (triangle)	140	60	70	140	410	0	0	0	140	60	70	260	140	410
Pr. I – Summerlea	600	280	320	0	1,200	5	n/a	5	540	280	320	1,140	0	1,140
Pr. J residential	370	200	340	1,950	2,860	0	0	0	370	200	340	910	1,950	2,860
Pr. K north – Bonavista	770	0	200	1,240	2,210	91	38	62	0	0	130	130	760	890
Pr. Q-1 – Ridgewood West	780	80	70	0	930	66	n/a	66	190	80	50	320	0	320
Pr. Q-10	90	0	0	0	90	81	n/a	81	10	0	0	10	0	10
Pr. T – Castlebury Meadow	310	330	160	190	990	78	19	66	70	30	80	180	150	330
Planned and serviced total	**16,550**	**4,900**	**5,830**	**15,000**	**42,270**	**n/a**			**5,880**	**3,390**	**4,050**	**13,320**	**9,690**	**23,010**
PLANNED, BUT UNSERVICED														
AA West residential	1,500	700	720	1,570	4,490	n/a			1,500	700	720	2,920	1,570	4,490
WW B – Rest of	780	350	370	800	2,300				780	360	370	1,510	800	2,300

Greenfield sites	Estimated potential total units					% completion			Potential remaining units					
	Singls	Semis	Rows	Apts	Total	G.O.	Apts	Total	Singles	Semis	Rows	G.O.	Apts	Total
Pr. K south	610	290	290	640	1,830				610	290	290	1,190	640	1,830
Pr. K south estate res	40	0	0	0	40				40	0	0	40	0	40
Pr. Q-2	80	20	10	0	110				80	20	10	110	0	110
Pr. Q-3	250	170	250	0	660				250	170	250	660	0	660
Pr. Q-4	250	170	250	0	660				250	170	250	670	0	670
Pr. Q-5	220	150	230	0	600				220	150	230	600	0	600
Pr. Q-7	60	40	60	0	160				60	40	60	160	0	160
Pr. Q-8	70	0	0	0	70				70	0	0	70	0	70
Pr. Q-9	190	0	0	0	190				190	0	0	190	0	190
Pr. Q-11	190	0	0	0	190				190	0	0	190	0	190
Planned but unserviced total	**4,280**	**1,900**	**2,200**	**3,080**	**11,450**				**4,280**	**1,900**	**2,200**	**8,380**	**3,080**	**11,450**
UNPLANNED														
Fort Whyte	510	240	250	540	1,530				510	240	250	1,000	540	1,530
South Transcona	1,780	830	850	1,860	5,330				1,780	830	850	3,470	1,860	5,330
Precinct D	4,140	1,930	1,980	4,320	12,370				4,140	1,930	1,980	8,050	4,320	12,370
Precinct B	1,410	660	670	1,470	4,200				1,410	660	670	2,730	1,470	4,200
St. Vital PS – w/o St Anne's	4,900	2,290	2,350	5,120	14,650				4,900	2,290	2,350	9,530	5,120	14,650
St. Vital PS – e/o St Anne's	1,540	720	740	1,600	4,660		n/a		1,540	720	740	2,990	1,600	4,600
Wilkes South	14,180	6,620	6,790	14,800	43,050				14,180	6,620	6,790	27,580	14,800	42,390
St. Norbert – e/o by-pass	2,790	1,300	1,330	2,910	8,460				2,790	1,300	1,330	5,420	2,910	8,330
St. Norbert – w/o by-pass	4,900	2,290	2,340	5,110	14,870				4,900	2,290	2,340	9,530	5,110	14,640
Unplanned total	**36,140**	**16,870**	**17,290**	**37,730**	**108,030**				**36,140**	**16,870**	**17,290**	**70,300**	**37,730**	**108,030**

Figure 6-11: Estimated potential total and remaining units by site, Alternative Higher supply scenario

Figure 6-12 below describes the residential densities that these sites are projected to build to. The methodology used to arrive at these densities is described in Step Two of Section 4.1.2.

Greenfield sites	Assumed density at full build-out (u/a net)	
	Standard	Alt. higher
Sage Creek	12.7	13.2
TW – Devonshire Village	22.0	23.1
TW – Devonshire Park	13.8	15.1
TW – Crocus	13.5	13.5
TW – Special Planning Area	27.5	31.2
WW NW – Bridgwater Lakes	7.7	7.7
WW Town Centre	13.9	16.0
WW W – Bridgwater Trails	13.2	15.0
WW B – Bison Run	21.9	25.9
WW SE – South Pointe	10.9	10.9
WW SW – Prairie Pointe	13.2	14.5
The Oaks area	5.1	5.1
Ravenhurst East – Canterbury Crossing	11.6	12.9
Pr. C – Waterford Green	12.5	12.6
Pr. E north – Amber Gates	23.2	25.3
Pr. E south	24.1	29.0
Pr. F – North Point	20.5	21.0
Pr. G – North Point	18.7	22.0
Pr. G – Highland Pointe	18.5	20.4
Pr. I – Summerlea	12.6	13.8
Pr. J residential	21.2	25.0
Pr. K north – Bonavista	16.5	18.3
Pr. Q-1 – Ridgewood West	10.0	10.2
Pr. Q-10	6.7	6.7
Pr. T – Castlebury Meadow	15.2	15.4
All other sites projected to an average greenfield density	14.1	15.3

Figure 6-12: Projected residential densities at full build-out, units per net acre

The charts below illustrate the mix of forecasted dwelling units using both the Standard and Alternative Higher supply scenarios.

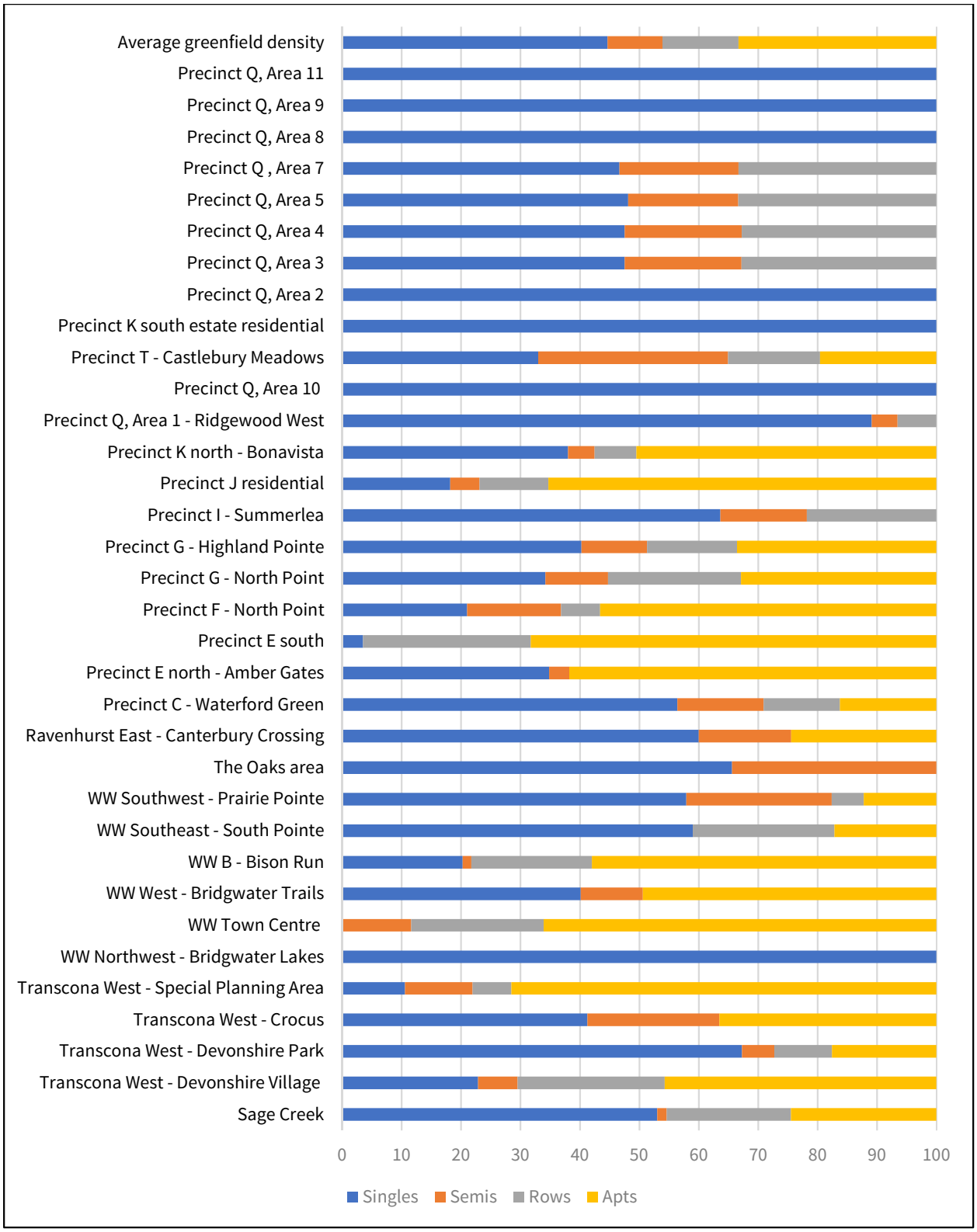

Figure 6-13: Forecasted dwelling unit mix, Standard supply scenario

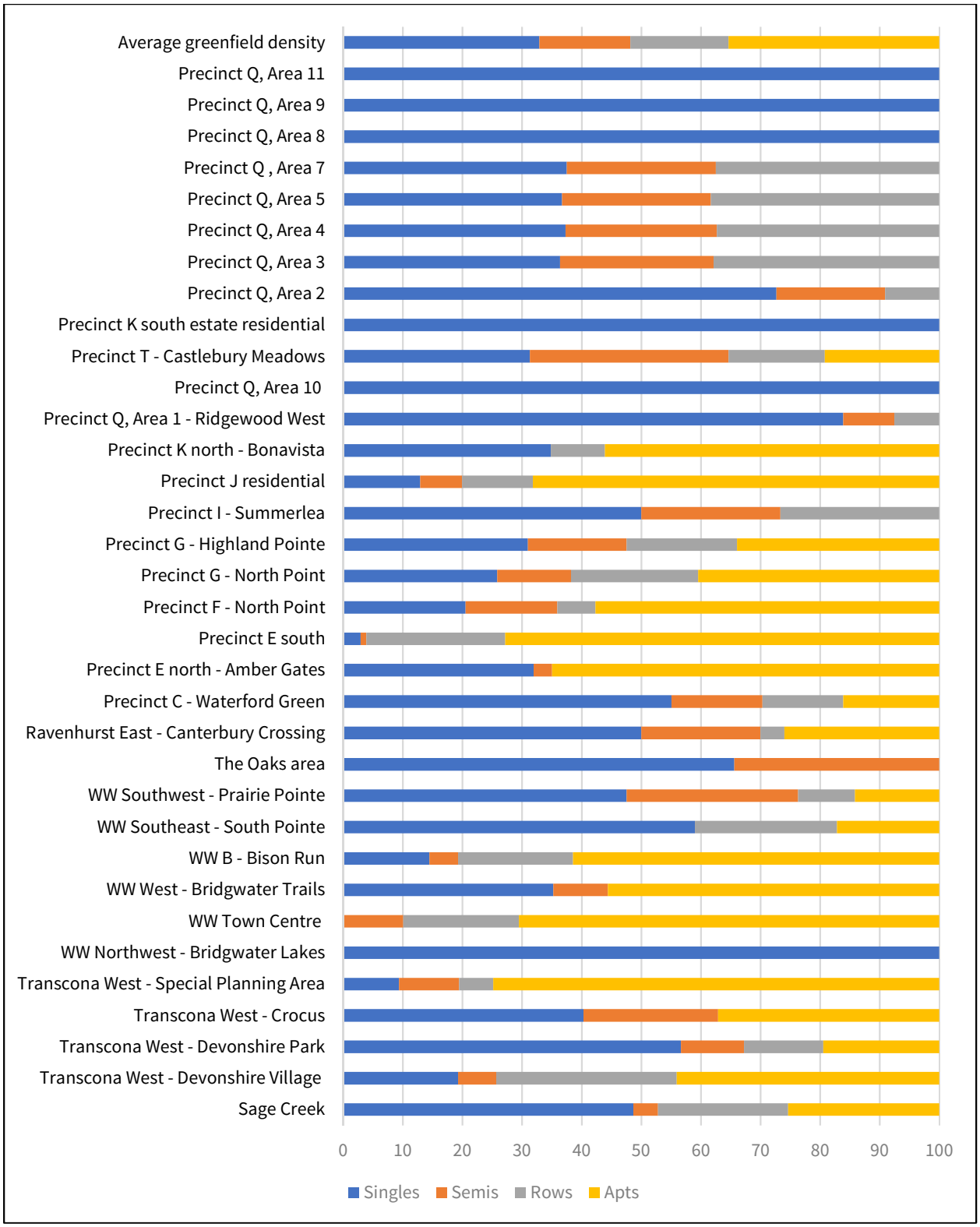

Figure 6-14: Forecasted dwelling unit mix, Alternative Higher supply scenario

As described in Section 4.1 above, these supply forecasts were developed using a standardized methodology. In some instances, consultation with development industry stakeholders yielded messages that, while not aligning with the methodology and therefore not warranting changes to the site forecasts, are nonetheless worth noting. They are as follows:

- The landowner has indicated that at least some portion of the approximately 100 acres of land designated for commercial development in the Waverley West Southeast and Southwest secondary plans will be rezoned for residential development.
- The major landowner of Waverley West B expects to accommodate approximately 1,400 dwelling units, while the City's Standard supply scenario forecasts approximately 1,980 dwelling units.
- A major landowner in Precinct K South indicated that the site will likely be developed at lower-than-average residential densities, particularly west of the railway tracks. This is attributed to higher acquisition costs associated with the area's high degree of land ownership fracture and land use designations in the existing precinct plan. The landowner also indicated that they expect the area to take a long time to develop.
- While the Urban Planning & Design Division has not engaged with Fort Whyte's landowner in some time, earlier design concepts were centered largely on lower density single-detached dwellings.

In accordance with this report's methodology, these discrepancies will be accounted for in the City's supply forecasts once a subdivision and rezoning application has been approved by Council.

7.0 Non-Residential Development Activity

7.1 Development Activity

The tables below describe permits issued for non-residential construction, expressed in both jobs as well as building floor area. Job types and assumed floor area per job assumptions are described in Section 4.2.2.

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
2017	160	180	3,140	1,300	490	210	5,480
2018	80	240	870	2,210	70	160	3,630
2019	320	230	210	1,490	710	220	3,180
2020	110	210	550	530	290	410	2,100
2021	330	160	50	520	220	320	1,600
2017-21 avg.	200	204	964	1,210	356	264	3,198

Figure 7-1: Non-residential development activity, 2017-21, by estimated number of jobs[1]

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
2017	112,900	194,200	912,700	559,400	341,600	226,000	2.3m
2018	53,700	255,500	259,400	952,200	51,500	165,300	1.7m
2019	220,500	235,600	60,000	641,500	437,000	233,300	1.8m
2020	73,300	222,100	160,700	229,500	200,700	441,700	1.3m
2021	229,100	150,500	15,500	224,100	156,500	339,500	1.6m
2017-21 avg.	137,900	211,580	281,660	521,340	237,460	281,160	1.6m

Figure 7-2: Non-residential development activity, 2017-21, by building floor area (sq. ft.)

In 2021, notable major non-residential projects included:

- A 174,440 sq. ft. multi-tenant industrial/commercial building at 175 Haggart Ave in the North Inkster Industrial neighbourhood.
- An 84,615 sq. ft. hotel at 460 Madison St in the St James Industrial neighbourhood.
- A 115,540 sq. ft. high school in the Waverley West B neighbourhood.
- A 10 storey, 98-unit, 93,000 sq. ft. assisted living facility[2] at 691 Wolseley Ave in the West Broadway neighbourhood.

[1] Numbers in Figures 7-1 and 7-2 are rounded

[2] As per standard practice, institutional residences such as assisted living facilities are considered to be non-residential uses.

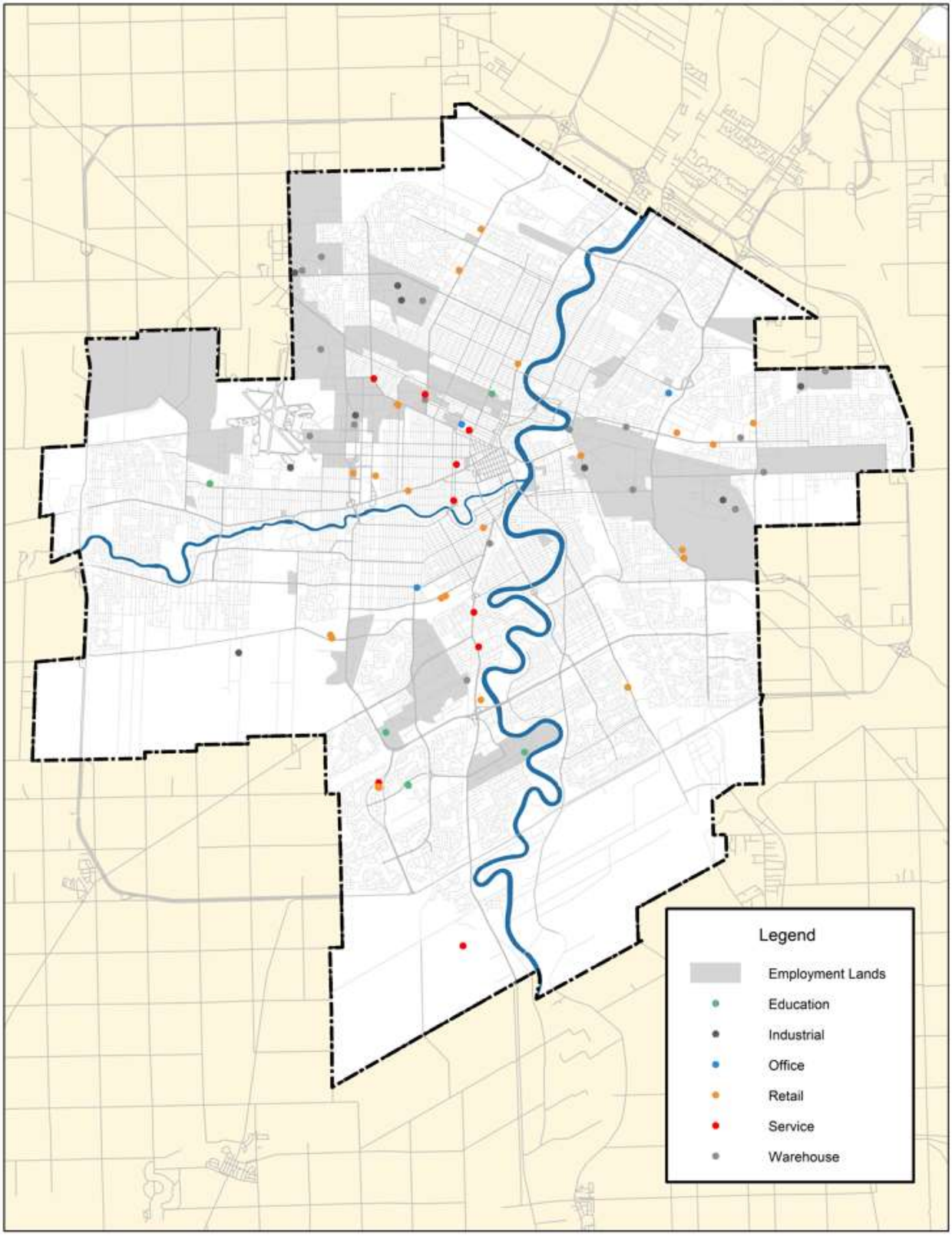

Figure 7-3: Location of non-residential development activity, 2021, by job type

The vast majority of new non-residential development occurs as new buildings on existing developed land, rather than building additions and/or absorption[1] of vacant land, as the tables below indicate.

By building type	2017	2018	2019	2020	2021	2017-21 avg.
Addition	17%	18%	21%	27%	20%	20%
New building	83%	82%	79%	73%	80%	80%

Figure 7-4: Non-residential development activity by building type, 2017-21, as share of total building floor area

By land uptake	2017	2018	2019	2020	2021	2017-21 avg.
Absorption of vacant land	18%	23%	37%	51%	8%	32%
Intensification of developed land	82%	77%	63%	49%	92%	67%

Figure 7-5: Non-residential development activity by land uptake, 2017-21, as share of total estimated jobs

The charts below indicate the share of job types in each Employment Land quadrant. This shows that each quadrant is desirable for different uses. For example, the East quadrant appears to be most desirable for industrial/manufacturing jobs, the Northwest for warehousing, and the Southwest for office jobs. This is consistent with what has been described by stakeholders over the years.

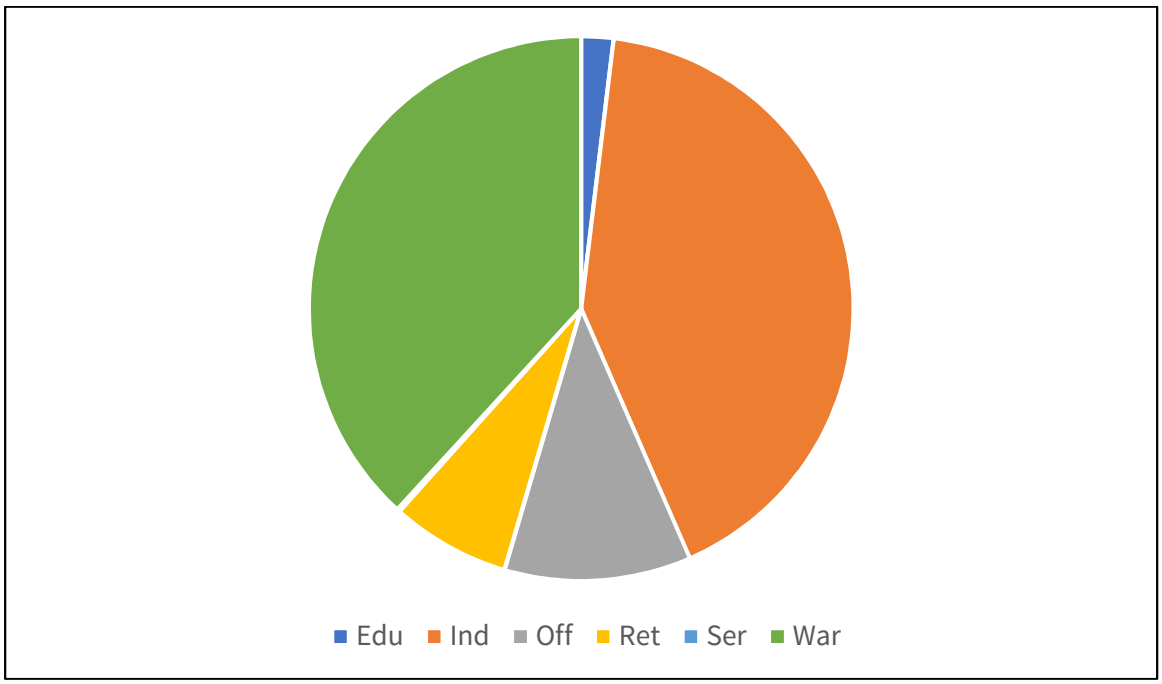

Figure 7-6: Non-residential development activity in designated Employment Lands by job type, East quadrant 2017-21

[1] For the purposes of this report, absorption specifically refers to new development on vacant land.

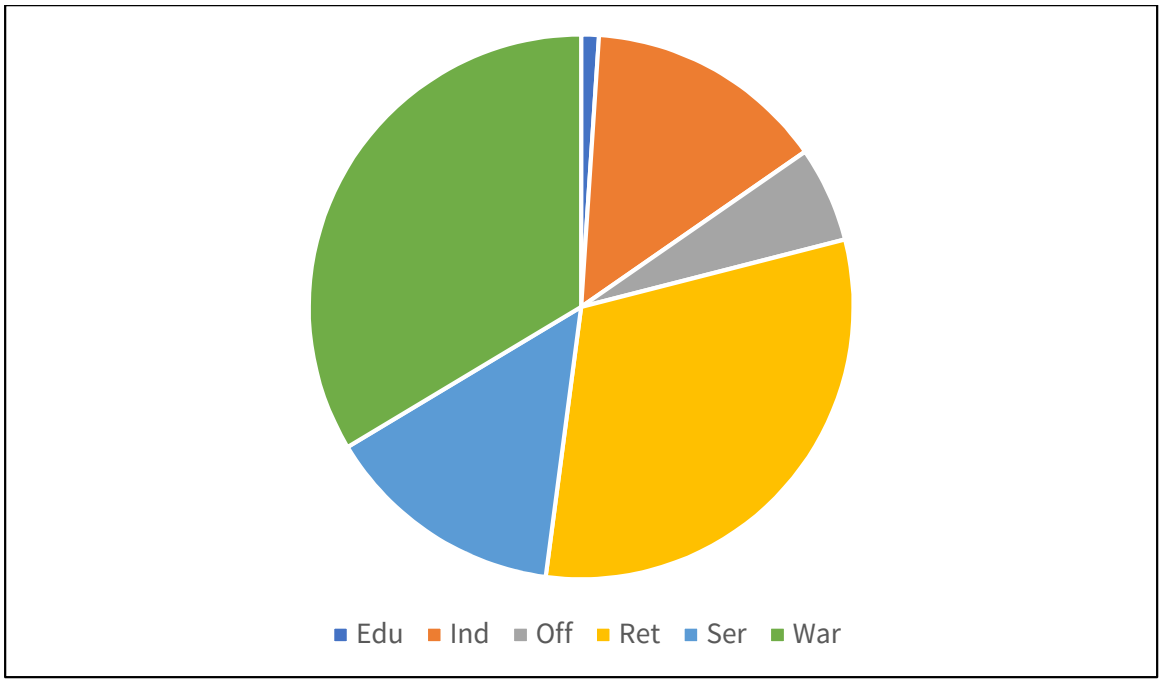

Figure 7-7: Non-residential development activity in designated Employment Lands by job type, Northwest quadrant 2017-21

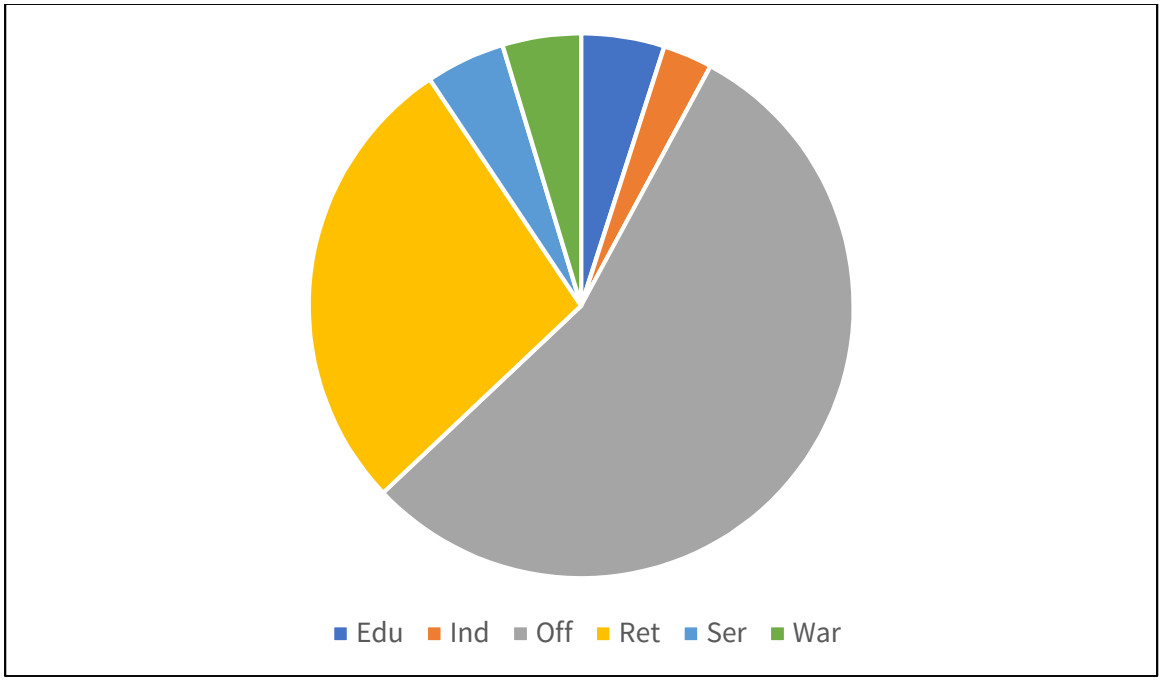

Figure 7-8: Non-residential development activity in designated Employment Lands by job type, Southwest quadrant 2017-21

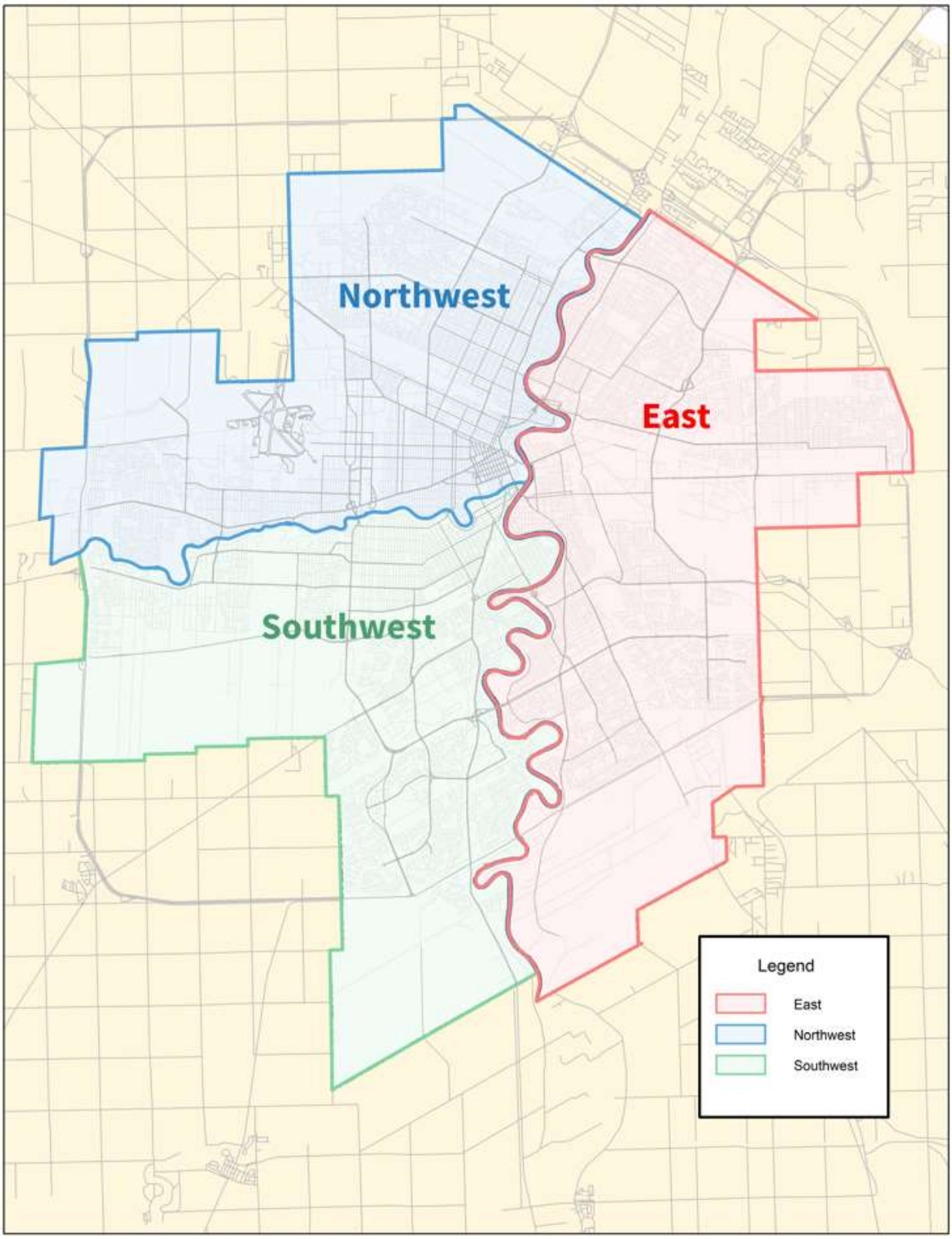

Figure 7-9: Quadrants used for measuring non-residential development activity

The next tables indicate Employment Lands development by quadrant, first by estimated jobs and then by building floor area. The differences between the two speak to differences in job type, where the East and Northwest is favoured lower-density industrial, manufacturing, and warehousing uses, while the Southwest is favoured for higher-density office uses.

Quadrant	2017	2018	2019	2020	2021	2017-21 total
East	19%	21%	14%	48%	17%	24%
Northwest	21%	8%	49%	21%	79%	36%
Southwest	60%	71%	38%	31%	4%	40%

Figure 7-10: Non-residential development activity in designated Employment Lands by quadrant, 2017-21, as share of total estimated jobs

Quadrant	2017	2018	2019	2020	2021	2017-21 total
East	27%	45%	20%	57%	19%	33%
Northwest	26%	6%	54%	30%	78%	41%
Southwest	48%	50%	26%	14%	4%	26%

Figure 7-11: Non-residential development activity in designated Employment Lands by quadrant, 2017-21, as share of total building floor area

7.2 Industrial Absorption

The last five years saw an annual average of 60 acres of vacant industrial-zoned land[1] absorbed[2] in the City of Winnipeg, with a low of 38 acres in 2021 and a high of 84 acres in 2020. This is an increase from the 35 acre per year average from 2011 to 2016[3]. During this time period, 126 acres were absorbed in the East quadrant, followed by 104 acres in the Northwest and 72 acres in the Southwest.

Year	Acres absorbed
2017	58
2018	40
2019	82
2020	84
2021	38
2017-21 avg.	60

Figure 7-12: Absorption of vacant industrial-zoned land, 2017-21

The table below compares City of Winnipeg absorption with figures from nearby employment areas in individual Capital Region municipalities as identified in Figure 7-14. These figures are

[1] Includes land both inside and outside designated Employment Lands.

[2] In this context, a property is considered absorbed if a new building is erected on previously vacant land.

[3] Pg 4-26, City of Winnipeg Employment and Commercial Lands Study, May 16, 2018

from 2017 to 2020. Rural municipality absorption was determined by comparing aerial photography from June 1, 2017 to April 9, 2021. Properties were considered absorbed if a building was erected between the two photos. These figures are compared to City building permit data.

Municipality	2017-20		2011-16	Serviced with water and sewer
	Land absorbed (ac)	Annual avg. (ac)	Annual avg. (ac)	
City of Wpg	264	66	35	Serviced
Headingley	99	25	10	Serviced
Macdonald	36	9	7	Serviced
Rosser	162	41	22	Serviced
Springfield	38	9	7	Not serviced
West St Paul	28	7	3	Kapelus Rd is serviced, West St Paul Industrial Area is not

Figure 7-13: Industrial land absorption, City of Winnipeg and Capital Region employment areas, 2017-20

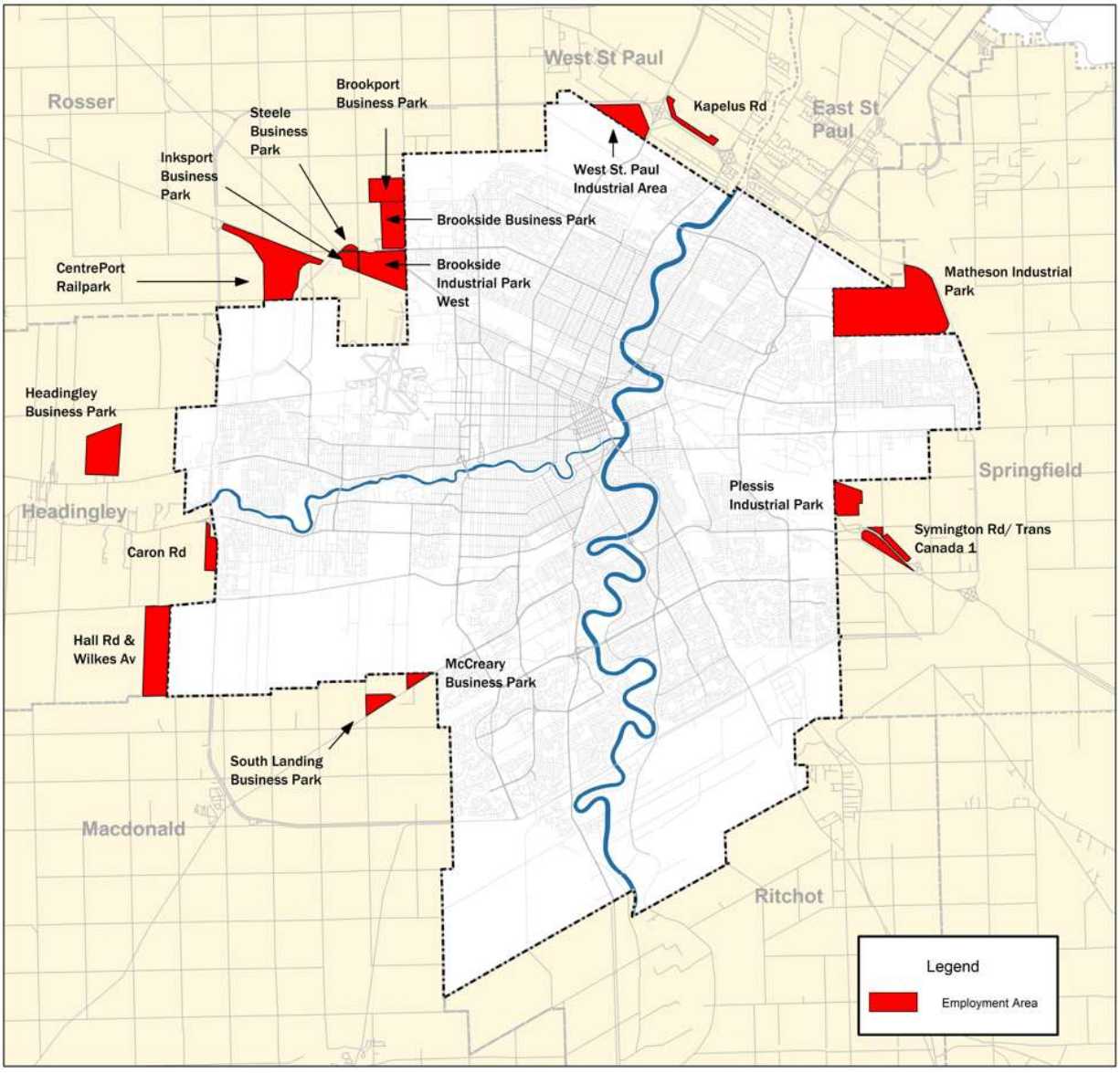

Figure 7-14: Capital Region employment areas adjacent to the City of Winnipeg

During this time period, the City of Winnipeg accounted for 44% of all industrial land absorbed in these areas. This compares to 34% of all Capital Region absorption in 2011 to 2016[1].

Jurisdiction	Land absorbed (ac)	%
City of Wpg	264	44
Selected Capital Region	343	56
Total	607	100

Figure 7-15: Industrial land absorption, City of Winnipeg and Capital Region employment areas, 2017-20

[1] Pg 4-27, *Employment and Commercial Lands Study*, May 16, 2018. Note that the 2011 to 2016 analysis included a wider range of Capital Region employment lands than the 2017 to 2020 analysis.

8.0 Non-Residential Land Supply

8.1 Industrial Land Supply

As described in Section 4.2.2, this analysis considers several categories of industrial land supply. All told, it identified 469 acres of unencumbered[1], shovel-ready (i.e. both regionally and locally serviced[2]), vacant industrial-zoned land in the City of Winnipeg as of January 1, 2022. Based on the Employment Land demand analysis prepared for the Winnipeg Metropolitan Region's *Plan 20-50*, this translates to 7.3 years. Additional supply exists where sites may be regionally serviced but locally unserviced, where they may be designated for employment uses but not zoned, and where a reasonable amount of intensification could occur on existing occupied sites[3]. These supplies are described in Figure 8-1 below.

For the purposes of reporting, this first category is most reflective of development-ready lands and should therefore garner the most emphasis; while other supply categories should be noted, constraints to bringing them online should be recognized.

	Category	Regionally serviced, unencumbered		Designated, but not zoned	Intensification potential
		Shovel-ready	Locally unserviced		
Supply	Net supply (ac)	469[4]	476	2,317	762
Forecast	Land need, 2022-51 (ac)	1,935			
	Shortfall	-1,454	-1,459	+382	n/a
	Years supply	7.3	7.4	35.9	n/a

Figure 8-1: Estimated vacant industrial land supply, City of Winnipeg, as of January 1, 2022

[1] Development on lands that were identified as encumbered are constrained by one or more factors, such as irregular lot configuration (including a likely need for consolidation with an adjacent parcel), conflict with an existing plan policy, access issues, small lot area, or are occupied by an existing non-structural use, such as vehicular parking or outdoor storage. See Section 3.2.2 for more information.

[2] Estimated based on proximity to local water and sewer mains. Engineering analyses would be needed to confirm this status.

[3] See Section 3.2.2 for more information.

[4] Additional regionally serviced, shovel-ready, encumbered supply is 198 acres, while regionally serviced, locally unserviced, encumbered supply is 142 ac.

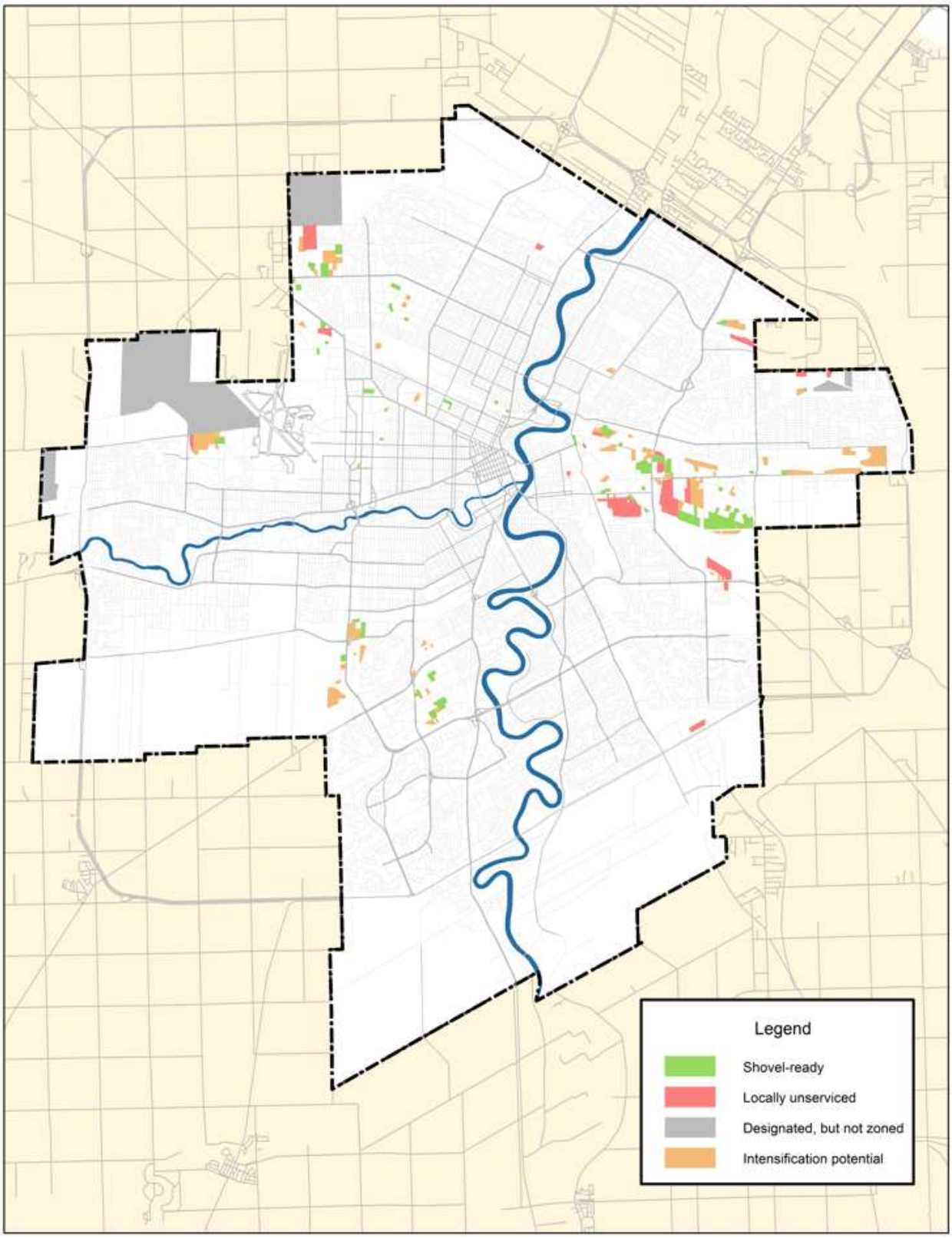

Figure 8-2: Map of estimated vacant industrial land supply, City of Winnipeg, as of January 1, 2022

These supplies are reduced as one considers site size and quadrant. Regarding quadrant, the majority of the City's supply falls within the East quadrant, with considerably less in the Northwest and Southwest.

Category	Regionally serviced, unencumbered		Designated, but not zoned	Intensification potential
	Shovel-ready	Locally unserviced		
Land area on sites > 5 ac	377	387	n/a	690
Land area on sites > 10 ac	268	284	n/a	574
East quadrant	302	370	62	441
Northwest quadrant	98	106	2,255	189
Southwest quadrant	69	0	0	131

Figure 8-3: Estimated vacant industrial land supply, City of Winnipeg, by site size and by quadrant

An important part of the City's existing industrial land supply falls within identified industrial Emerging Sites, most notably the St Boniface Industrial area.

Sites	Regionally serviced, unencumbered		Intensification potential
	Shovel-ready	Locally unserviced	
All Emerging Sites	242	292	313
Cavalia Lands	16	0	44
Inksbrook	44	74	166
Public Markets	0	73	4
St Boniface Industrial	182	145	100

Figure 8-4: Estimated vacant industrial land supply within identified industrial Emerging Sites

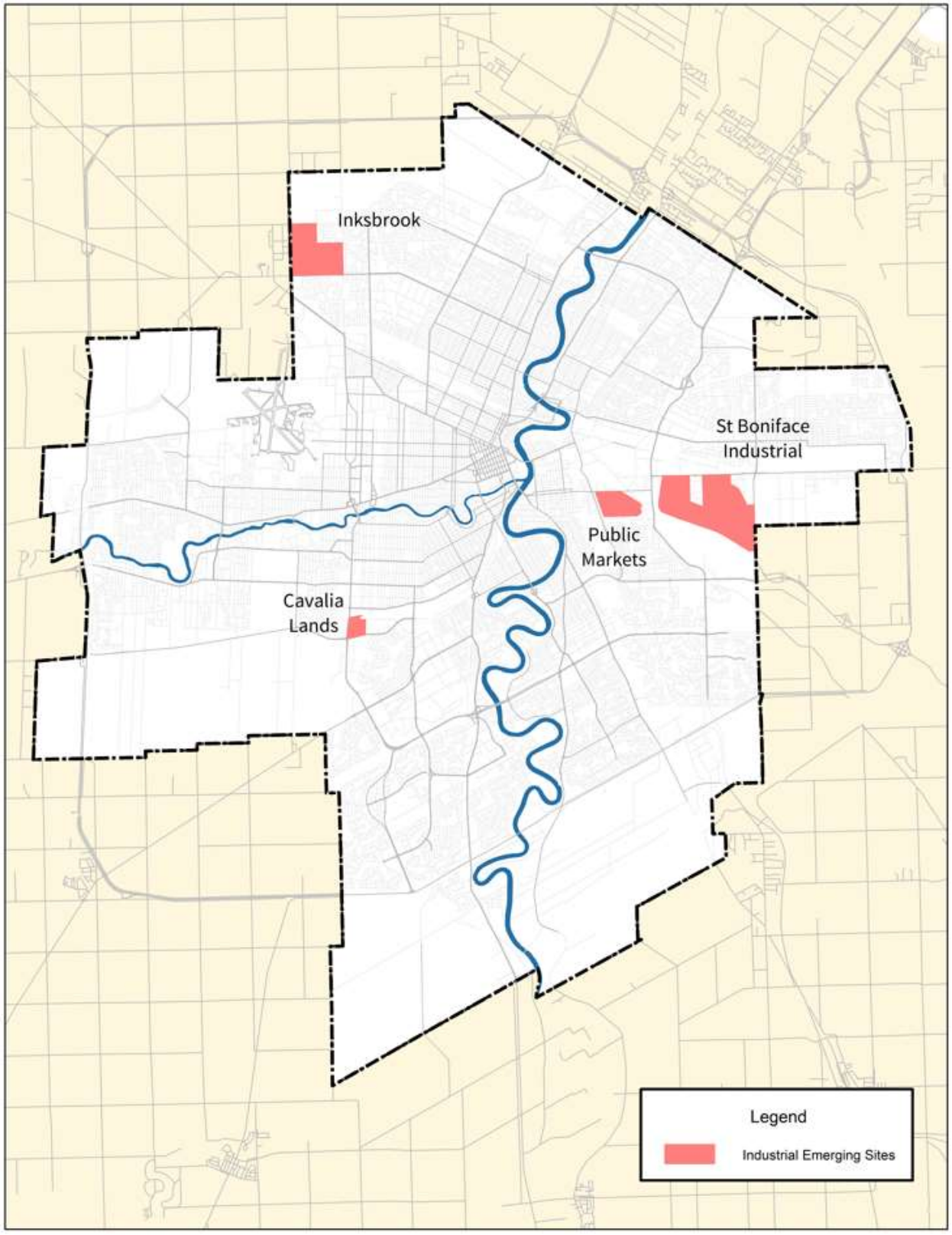

Figure 8-5: Identified industrial Emerging Sites

At first glance, this supply may seem quite reasonable. However, as it relates to the City's stated aims of accommodating forecasted industrial growth and promoting competitiveness and economic diversity, these numbers fail to tell the full story. As opposed to residential demand, industrial demand is much more sensitive to user preferences, who may require specific characteristics such as desired quadrant, minimum site size, direct access to major transportation corridors, etc., all of which can limit the quantity of land available to satisfy an economic development inquiry at a given time. To some extent, the City's existing supply may not be desirable and/or investable to many potential users.

Further, while this analysis identified and quantified vacant land, much of it may not be actively marketed at a given time or held by a property owner willing to sell. This point was strongly emphasized by stakeholders, who when describing an industrial land supply discrepancy between the City and nearby rural municipalities, more specifically referred to available marketed land. Future analysis could compare active listings across jurisdictions.

Additional consideration of City-owned sites is warranted. Cities often own vacant industrial land to facilitate economic development opportunities. After scrutinizing the City's own inventory to identify existing (most notably landfills) and planned future uses, its inventory of vacant, unencumbered, industrial-zoned land is limited to 144 acres in the St Boniface Industrial area (see Figure 8-6 below), which would be considered shovel-ready. This figure overrepresents what is available for new purchasers based on recent sales; as of September 12, 2022, the remaining balance of land available for purchase is 101 acres.

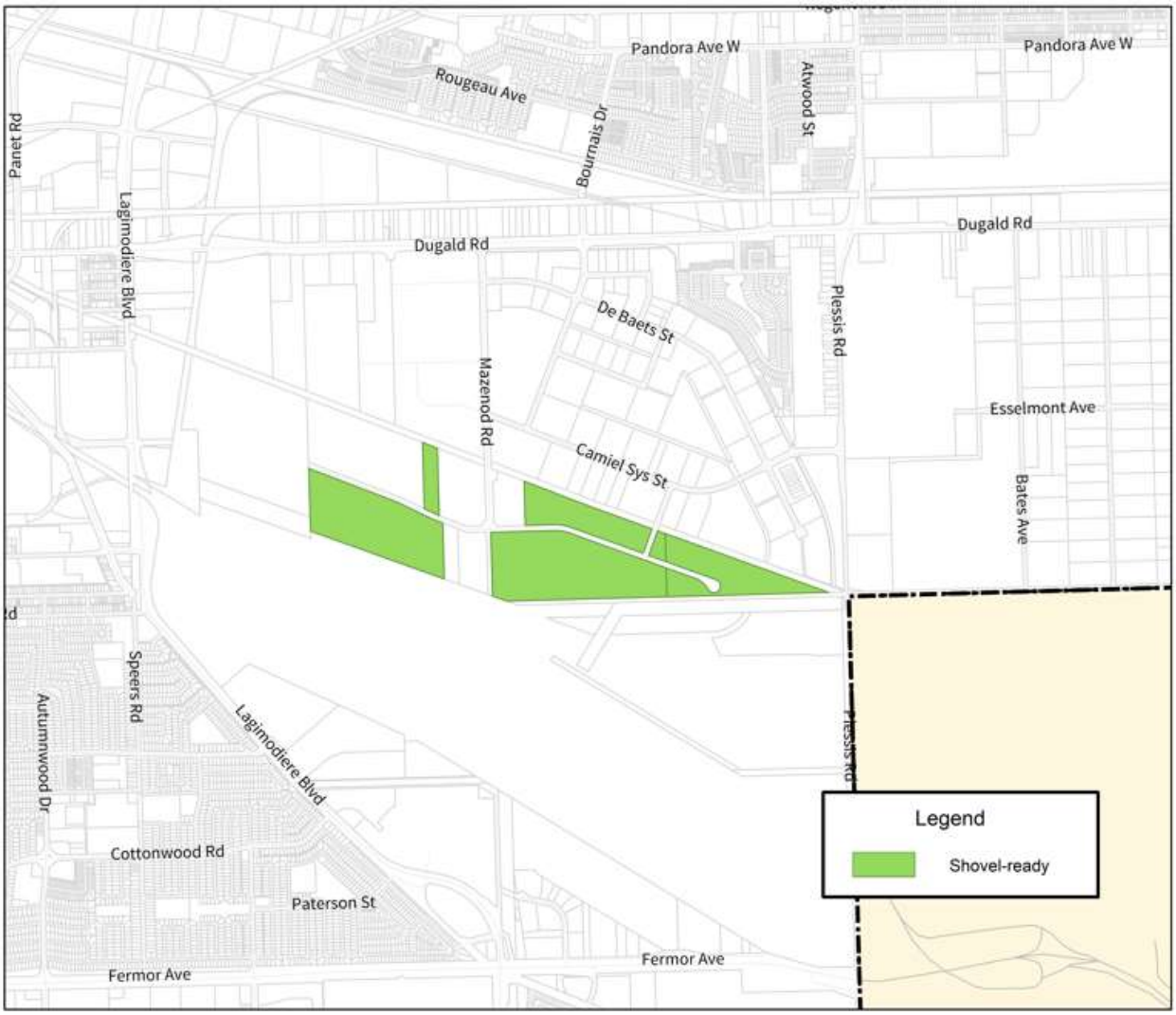

Figure 8-6: Unencumbered City-owned industrial-zoned and designated land

8.2 Commercial Land Supply

This analysis identified a vacant commercial land supply of 601 acres as of January 1, 2022. This supply is comprised of a few separate categories: vacant commercial-zoned land, land located in Regional Mixed Use Centres and commercial Emerging Sites whose commercial rezoning has been approved by Council but has not yet come into force, and the continued buildout of underdeveloped sites in Regional Mixed Use Centres and Emerging Sites.

As described in Section 4.2.2, this supply is compared to two demand scenarios based on varying shares of forecasted retail expenditures as e-commerce. As detailed below, the difference between the two are not significant. The status quo demand forecast anticipates 549 acres of commercial land demand between 2022 and 2041, which means the City's land supply is equivalent to 21 years of land supply. A higher e-commerce demand forecast anticipates 509 acres of required commercial land, representing 22 years of supply. For reporting purposes, more emphasis will be placed on the former scenario.

Total commercial supply	
Vacant commercial-zoned	323 ac
Approved but non-vested in RMU Centres and Emerging Sites	219 ac
Cont'd build-out in RMU Centres and Emerging Sites	60 ac
Total	601 ac
Forecasted demand, 2022-41	
Forecasted demand	549 ac
Shortfall/surplus	+53 ac
Forecasted annual absorption	29 ac
Years supply	21 years
Higher e-commerce demand scenario, 2022-41	
Forecasted demand	509 ac
Shortfall/surplus	+92 ac
Forecasted annual absorption	27 ac
Years supply	22 years

Figure 8-7: Commercial supply and forecasted demand

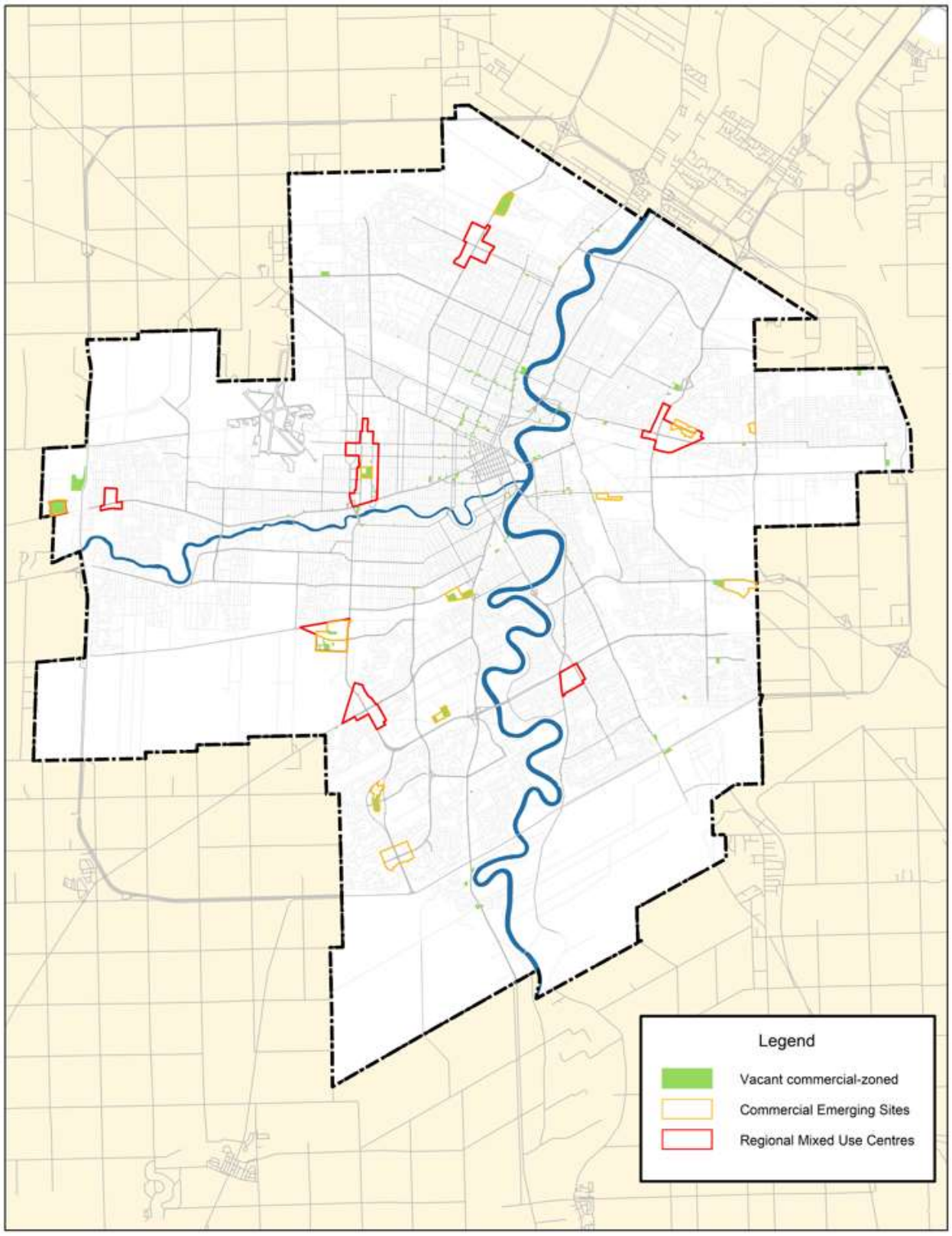

Figure 8-8: Map of commercial supply

The continued build-out of Regional Mixed Use Centres and commercial Emerging Sites are a critical source of the City's commercial land supply. The table below details the components of this supply.

Sites	Vacant commercial-zoned land, ac	Approved but non-vested land, ac	Lot coverage, %	Intensification potential, ac (land area equivalent)
Emerging Sites	172	219	n/a	42
Old Stadium site	16	-	0.14	0
Outlets of Tuxedo	5	-	0.22	6
Precinct J	0	71	0.00	-
Precinct F	44	-	0.00	-
Public Markets	0	27	0.00	-
Ravelston-Plessis	0	-	0.19	3
Reenders	0	27	0.00	-
Seasons of Tuxedo	11	-	0.15	22
Sugar Beets	16	-	0.03	6
Taylor Lands	22	-	0.11	4
Waverley West South Pointe	0	94	0.00	-
Waverley West Town Centre	12	-	0.14	1
Westport Festival	45	-	0.00	-
Regional Mixed Use Centres	81	n/a	n/a	16 (see notes)
Kenaston-McGillivray	0		0.24	8
McPhillips-Leila	0		0.24	-
Polo Park	21		0.33	-
Regent-Lagimodiere	0		0.24	7
Seasons of Tuxedo	16		0.21	~~10~~
St Vital	0		0.29	-
Unicity	0		0.24	3
Westport Festival	45		0.00	-

Notes:

- Seasons of Tuxedo excluded from RMU Centre Intensification Potential summary, as this land was already accounted for under Emerging Sites.

- Figures for Outlets of Tuxedo and Seasons of Tuxedo under Emerging Sites do not equal the Seasons of Tuxedo total under RMU Centres as the geographies are different.

Figure 8-9: Commercial supply by commercial Emerging Sites and Regional Mixed Use Centres

These results affirm the continued persistence of an oversupply of commercial land first identified in the 2018 *Employment and Commercial Lands Study*. This study warned of the potential consequences of such a surplus, noting that, “this surplus of commercial land will affect retail commercial intensification development opportunities in Winnipeg”, and that, “it is anticipated that there will be limited market-related incentive to develop retail commercial space in multi-level or mixed-use formats in much of the City in the near term”. It also warned that, “The City may wish to be cautious about making additional commercial lands available for development at this time, as an oversupply of developable land may result in commercial uses being ‘cannibalized’ and relocated from existing commercial areas”[1] (i.e. there is a risk of existing commercial uses vacating existing areas, negatively impacting their vitality).

[1] P. 9-11-12, City of Winnipeg *Employment and Commercial Lands Study*, May 16, 2018.

9.0 Achieving the Intensification Target

The General Growth section of *Complete Communities 2.0* establishes the following intensification targets:

- A minimum of 50% of all new dwelling units to be located in the intensification target area; and
- A minimum of 350 new dwelling units per year in the Downtown until 2030, and 500 dwelling units per year after 2030.

It directs the City to achieve these targets by making development in these areas easier, more desirable, and more predictable by enabling and encouraging compatible infill development, leveraging enabling tools[1], and ensuring that lands are planned, zoned, and serviced to facilitate development. While the City has exceeded its target in recent years, this should not be a reason to relent. It is expected that, without measures to facilitate it, infill will become increasingly more difficult as the City depletes its supply of easier-to-develop sites. It should also be emphasized that rates of intensification are driven largely by shifting market forces outside of the City's control, with City actions serving to either ease or impede these forces, against which these targets are planted stakes. Ultimately, the City should focus on what it can control, that being to maximize infill development within the limits of trade-offs acceptable to Council. To this end, the above targets are minimums that establish a floor, not a ceiling.

The following City initiatives, recently completed, currently underway, or planned, will help it achieve its intensification targets:

[1] Explained in the plan glossary as specific tools designed to assist in the implementation of *Complete Communities 2.0*, such as zoning, incentives, partnerships, infrastructure investments, and planning.

Tool	Initiative	Description
Development regulations	Airport Vicinity Protection Area – repeal of secondary plan and amendment of zoning PDO	On June 23, 2022, Council amended the Airport Vicinity PDO-1 to repeal a maximum multifamily density of 35 units per acre in Area II of the area's zoning. This will allow for more widespread multifamily development opportunities in previously restricted areas. At the same time, Council also repealed the *Airport Vicinity Protection Area Secondary Plan*. Both changes were made to align with the *Airport Vicinity Protection Area Regulation*, which was adopted by the Province of Manitoba on August 12, 2021.
Development regulations	Board of Adjustment-related amendments to the *Development Procedures By-law* no. 104/2020	On July 21, 2022, Council amended the *Development Procedures By-law* to delegate decision-making authority to the Director of Planning, Property, and Development on "C" variance and conditional use applications. It also provided direction to repeal the *Board of Adjustment By-law* no. 5894/92. Doing so should provide for more consistent and predictable decision-making on these development applications.
Financial incentives	Housing Initiatives	The City of Winnipeg has been administering a number of housing initiatives that, while not its primary intent, will help contribute to residential development in the intensification target area. The Affordable Housing Now program administers Tax Increment Financing and Capital Grant funding streams where the former, as per the City's new TIF Policy approved by Council in February 2022, provides additional opportunities for projects located Downtown and in Winnipeg's five Housing Improvement Zones[1] (HIZs). The Affordable Housing Opportunities in HIZs program offers surplus City-owned lands at discounted rates for affordable housing development in HIZs. The City is also administering approximately $24 million in funding for the rapid construction of affordable housing for vulnerable people via the Rapid Housing Initiative, launched in 2020 by the Government of Canada through Canada Mortgage and Housing Corporation. All funded projects have been located in the central core of the city. Modest funding opportunities to support the creation of affordable housing in HIZs also exist through the City's Housing Rehabilitation Investment Reserve.

[1] William Whyte, Spence, West Broadway, Centennial, and North Point Douglas neighbourhoods, all located in the intensification target area of the City.

Tool	Initiative	Description
Financial incentives	Tax Increment Financing	On February 24, 2022, Council adopted the *Tax Increment Financing Policy* to provide guidance on the use of this tool, which provides grants and other payments from incremental municipal property taxes, in alignment with Council policy. This policy grants additional consideration for proposals located within the Downtown, as well as other areas within the intensification target area. On March 25, 2021, Council approved a TIF grant to CentreVenture Development Corporation in respect of the southern portion of the Market Lands site. The project is planned to include space for Manitoba arts organizations, a high-quality outdoor public realm, and affordable rental apartment units. On June 23, 2022, Council approved a TIF grant to the Southern Chiefs Organization Inc. in respect of the former Bay building at 450 Portage Ave. This project is planned to include 300 affordable and market housing units, in addition to other uses.
Infrastructure	Active transportation	In its 2022 Budget, Council allocated $3.17m to the Pedestrian and Cycling Program, which is reasonably consistent with a five-year average of $3.43m. It also allocated $2.55m for AT improvements in the budget's regional street renewal projects. Promotion of sustainable transportation helps incent intensification.
Infrastructure	Transit	In early July 2022, the federal and provincial governments, along with the City of Winnipeg, announced a combined $478 million towards six transit-related projects. This includes $20.4 million for the Primary Transit Network Infrastructure project, which will help implement the Primary Transit Network as described in the *Winnipeg Transit Master Plan*. Currently, projects are underway at the Main & Pioneer and Nairn & Watt intersections that enhance accessibility of existing and future transit service. Both locations are key to the implementation of the planned Primary Transit Network, a key transportation-related incentive to intensification.

Tool	Initiative	Description
Infrastructure	Wastewater treatment	On August 15, 2022, the federal and provincial governments, along with the City of Winnipeg, announced a combined total of $550 million to fund the second phase of upgrades to the North End Sewage Treatment Plant, providing improvements to its biosolids treatment facilities. These upgrades will support development within both greenfield and infill areas.
Infrastructure	Water main renewals	In 2021, 9.3 km of water mains were renewed in the intensification target area. These renewals will increase available fire flow and decrease the likelihood that fire flow would be a constraint to intensification by increasing pipe size and/or improving pipe material.
Planning	CentrePlan 2050 (Downtown Plan)	Work has begun on a plan for the Downtown that will guide development and public investments to ensure a coordinated approach to revitalization. To date, an extensive literature review has been undertaken. A request for proposals for consultant services was also issued in early June, whose work will update the Downtown Urban Design Guidelines, prepare a streetscape design standards manual, and develop functional designs for seven planned bike routes conceptually identified in the Winnipeg *Pedestrian & Cycling Strategies*.
Planning	Naawi Oodena Area Master Plan	In June 2022, the City of Winnipeg and Treaty One Nations entered into the Gaawijijigemangit Agreement, a Municipal Development & Services Agreement providing a framework for development and the provision of municipal services for the portion of the site that will be designated as an Urban Reserve, which accounts for approximately two-thirds of the Naawi-Oodena area. This agreement enables the development of this portion of the site as a mixed use neighbourhood. The balance of the site will be developed by the Canada Lands Corporation and will be administered by a secondary plan. The City is expecting to receive a Secondary Plan Application for review and processing in Fall 2022.
Planning	North and South Point Douglas secondary plan	The Public Service is in the very early stages of planning a secondary plan process for North and South Point Douglas. It is expected that a secondary plan will guide land use and transportation investments in anticipation of emerging development interest, driven by its proximity to Downtown, its riverfront, planned rapid transit, and declining viability of industrial uses. A Request for Proposals for Consulting Services is planned to be released by the end of 2022, with work beginning in 2023.

Tool	Initiative	Description
Planning	Residential Development Guidelines implementation, including Glenwood Neighbourhood PDO	On June 24, 2021, Council approved the *Small-Scale and Low-Rise Residential Development Guidelines* to promote consistency and predictability in infill development approvals in designated Mature Communities. Further to this intent, on July 21, 2022, Council endorsed a draft zoning Planned Development Overlay (PDO) to address infill-related issues in the Glenwood neighbourhood and directed the Public Service to prepare a zoning by-law amendment to implement it. It is expected that this will occur in the coming year.
Planning	Water and Wastewater Capacity Study	The Water and Waste Department (WWD) has begun planning a Water and Wastewater Capacity Study to determine how other Canadian cities determine and communicate capacity constraints, and to develop a pilot study for implementation. A Request for Proposal for Consulting Services is planned to be released in Fall 2022.
Planning	Zoning By-law review	The Planning, Property, and Development Department (PPD) is preparing to review *Zoning By-law* no. 200/06. Having been first adopted 15 years ago, it is due for an update. An updated zoning by-law will ensure conformance with newly-adopted *OurWinnipeg 2045* and *Complete Communities 2.0*, and will seek to streamline development approvals. It is hoped that the first phase of this work will begin in the next year.

Tool	Initiative	Description
Streetscaping	Streetscaping and public realm improvements	Streetscaping and public realm improvements are funded from a variety of sources. These initiatives help contribute to an area's desirability. On April 28, 2022, Council approved funding for $10 million for nine Downtown urban design and public realm improvements funded primarily from the City's share of the Canada Community Building Fund (former Federal Gas Tax Fund) received in 2021 via the COVID-19 Economic Response and Recovery Plan and Downtown Recovery Strategy. This will provide a significant boost to improving the quality of the public realm Downtown. Otherwise, the 2022 Operating and Capital Budgets allocated $200,000 to the Downtown Enhancement Program to upgrade and improve public spaces and streetscapes Downtown, as well as $126,000 for BIZ zones, image routes, and neighbourhood main streets. These figures compare to five-year averages of $171,000 and $267,000 respectively. The Public Service has been working on streetscaping initiatives along Broadway, including restoring the operations of the Broadway fountain, and developing a plan for street trees as well as a broader streetscaping plan. Most road reconstruction projects also include a streetscaping component.

Figure 9-1: City initiatives that will help achieve the intensification target

10.0 Greenfield Development Opportunities and Constraints

The Greenfield Development Opportunities and Constraints table is included in the Appendix of *Complete Communities 2.0*. It is intended to help communicate and implement greenfield phasing policies found under Goal 4.0 of its General Growth section by highlighting vital information, including establishing a baseline understanding of anticipated infrastructure investments to guide future decision-making. Sites included in this table have been identified as having at least one constraint to development – constraints that are the responsibility of the City to overcome – such as the need for a precinct plan, a major road, and/or regional water/wastewater infrastructure. Greenfield sites with no identified constraint are considered to be planned and serviced and do not need to be addressed.

As per Policy 5.2 of the General Growth section, the Public Service is directed to update this table on an annual basis to reflect changing conditions, which may include refined land supply forecasts, changes to infrastructure projects, refined project costs, change in infrastructure priority, and completion of local area planning. In the case of discrepancies found between the version of the table found in *Complete Communities 2.0* and those found in annual land monitoring reports, the most recent report should be referenced for the most accurate source of this information.

Services and infrastructure cited in this table were included to help stakeholders understand the capital budget implications of development, and were selected based on the value they offered in comparing study areas. This table excludes costs expected to be borne relatively equally across new greenfield development, growth-related projects needed regardless of the spatial distribution of growth (e.g. transit garages), and operating costs. Noted infrastructure is divided into two categories: infrastructure that is growth-enabling (i.e. that which is a prerequisite to development), and infrastructure that is growth-supportive (i.e. not a prerequisite to development but is needed to support full build-out of the site). It should be emphasized that the infrastructure included in this table is labeled as “anticipated”; in most cases, additional analysis is needed to confirm these requirements.

Questions guiding this inquiry are described in the table below:

Service	Question	How was the question answered?
Community services, including community/recreation centres and libraries	Will full build-out of the study area create or enhance pressure for the City to develop a new facility?	Answers were based on level of service targets in the Winnipeg Recreation Strategy (December 2021)
Fire and Paramedic Services	Can sufficient fire coverage be provided to accommodate full build-out of the study area?	Answers were based on GIS analysis and NFPA 1710 response time standards.
Major road projects	Will full build-out of the study area create or enhance pressure to proceed with a planned major road project?	Projects were identified from the Transportation Master Plan (2011), with the exception of the Warde Ave extension, which was not included but identified as a prerequisite to development. Answers were based on VISUM model analysis and future forecast data.
Water and wastewater servicing	What regional, City-funded infrastructure related to water and/or wastewater conveyance is required to allow for full build-out of the study area?	Answers were based on review by the Water and Waste Department

Figure 10-1: Questions used to identify anticipated infrastructure

Changes Made

The Public Service's review of the Greenfield Development Opportunities and Constraints table identified the following changes from the version contained in *Complete Communities 2.0*:

- References to "community centres" have been replaced with "community/recreation centres" to better reflect their existing and planned functions.
- "Share of Mission combined sewer relief" was removed as Growth-Supportive Infrastructure under South Transcona. This project is an example of Combined Sewer Overflow (CSO) mitigation work, which is regulatory driven. While the current plan for this work may provide some benefit to South Transcona, it should not be considered growth-supportive. Development that proceeds earlier than the operation of the relief works could work around capacity constraints, for example by building storm water retention basins with greater-than-average capacities.
- "Share of Clement Parkway (Grant to Wilkes)" was added as Growth-Enabling Infrastructure to Wilkes South. Its omission from the table in *Complete Communities 2.0* was made in error.

	Short-to-medium term			
	AA West residential	**Waverley West B**	**Precinct K South**	**Remainder Precinct Q**
Quadrant	West	Southwest	Southeast	Southwest
Potential Units	3,900	2,670	1,630	2,440
Precinct plan status	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan approved
Sector plan status	-	-	-	-
Precinct plan priority	-	-	-	-
Sector plan priority	-	-	-	-
Servicing priority	1	1	2	4
Anticipated growth-enabling infrastructure	• Wastewater forcemain and pump station (2021) • Water feedermain (2021)	• Share of Southwest interceptor (2023)	• Share of Warde Ave extension	• Share of Clement Parkway (Grant to Wilkes)
Anticipated growth-supportive infrastructure	• Share of Silver Ave extension	• Share of community/rec centre & library • Share of fire station • Share of Kenaston Blvd improvements (2020)	• Share of community/rec centre • Share of Marion underpass • Share of St Mary's widening (2028) • Share of Osborne underpass/widening (2025)	None
Anticipated avg. City costs per unit	Below average	Average	Below average	Below average
Site dependencies	None	None	None	Wilkes South sector plan needed before Clement Parkway can be planned as per Council motion Dec. 13, 2017
Land assembly requirement	Some assembly	More assembly	More assembly	More assembly
Primary Transit Network	No planned connection	Planned connection	Planned connection	No planned connection
Decision-making guidance	Subdivision and rezoning applications may be submitted following completion of a precinct plan. Build-out may be limited by the need for growth-enabling infrastructure.			

Figure 10-2: Updated Greenfield Development Opportunities and Constraints table, 2022

Short-to-medium term				Long term		
South Transcona	**Fort Whyte**	**Precinct D**	**Precinct B**	**Wilkes South**	**St. Vital Perim. South**	**St. Norbert**
Northeast	Southwest	Northwest	Northwest	Southwest	Southeast	Southwest
4,630	1,330	10,750	3,650	36,820	16,720	19,960
Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required
-	-	-	-	Sector plan required	Sector plan required	Sector plan required
1	1	2	3	4	4	5
-	-	-	-	1	1	2
2	2	3	4	5	5	6
None	• Wastewater interceptor • Share of Southwest interceptor (2023)	• Share of Chief Peguis Trail (2027) • Wastewater interceptor	• Share of Chief Peguis Trail (2027) • Wastewater interceptor	• Share of Clement Parkway (Wilkes to McGillivray) • Share of Clement Parkway (Grant to Wilkes) • Wastewater interceptor • Water feedermain	• Wastewater interceptor • Water feedermain	• Wastewater interceptor • Water feedermain
• Community/ rec centre • Fire station • Share of Schreyer Parkway (2025) • Share of Marion underpass • Share of Louise Bridge (2024)	None	• Share of community/rec centre • Share of library • Fire station • Share of Arlington Bridge (2020)	• Share of community/rec centre • Share of library • Share of Arlington Bridge (2020)	• Two community/rec centres • Library • Fire station • Sterling Lyon extension	• Community/ rec centre • Share of library • Fire station • Share of Marion underpass • Share of St Mary's widening (2028) • Share of Osborne underpass/ widening (2025)	• Community/rec centre • Library • Share of Kenaston Blvd improvements (2020)
Above average	Below average	Above average	Above average	Average	Below average	Average
None	None	Precinct G is first – Chief Peguis Trail and wastewater extended from east.	Precinct D is first – Chief Peguis Trail and wastewater extended from east.	Precinct Q is first – Clement Parkway extended from north.	None	St. Vital Perim. South. is first – wastewater extended from South End treatment plant.
More assembly	Assembled	Some assembly	Some assembly	More assembly	More assembly	Some assembly
Planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	Planned connection
These sites will be the next priorities for precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.				Completion of sector plans are required before precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.		

Some additional notes on the Greenfield Development Opportunities and Constraints table:

- Where applicable, the recommended year of detailed design and authorization as per the 2020 *Infrastructure Plan* is indicated in parentheses next to infrastructure projects.
- Many identified projects benefit larger areas beyond those listed in this table. The extent to which project costs should be allocated to individual sites warrants further analysis and refinement, including in consultation with affected stakeholders. As a result, listed projects and "Anticipated avg. City costs per unit" may be subject to change.

Potential Future Changes

The following items are being monitored by the Public Service and may result in changes to future versions of the table:

Topic	Implications for	Description
Community/rec centres and libraries	City-wide	On May 26, 2022, Council adopted the *Winnipeg Recreation Strategy* as a long-term strategic plan to guide City of Winnipeg recreation facility investment and service provision. Resulting from its approval, the Public Service will be monitoring the following for future editions of this report: - As a condition of the Recreation Strategy's approval, it directed the Public Service to produce a review and assessment of capital library projects with considerations for growth, including customer demand and expectations in high growth areas such as South Winnipeg. It was directed to report back to the Standing Policy Committee on Protection, Community Services, and Parks in April 2023. The results of this analysis will have implications on the Greenfield Development Opportunities and Constraints table. - The *Recreation Strategy* prescribes levels of service for a wide range of facilities, ranging from indoor aquatic centres and arenas to spray pads, while the analysis in this report only considers community/rec centres and libraries. Consideration will be given to the inclusion of additional amenities, relative to the intent of the chart.

Topic	Implications for	Description
Fire and Paramedic Services	City-wide	On April 14, 2022, a contract was awarded to MORR Transportation Consulting Ltd. in response to RFP No. 861-2021 for Consulting Services for an Emergency Vehicle Pre-Emption Feasibility Study. Emergency Vehicle Pre-Emption (EVP) systems adjust intersection signalization to provide right-of-way for oncoming emergency vehicles traveling with lights and sirens, reducing intersection collisions and response times, and increasing the geographic coverage of fire paramedic stations. The objective of this contract is to help understand the transportation implications of city-wide EVP and the benefits it may provide.
Major roads	City-wide	The Public Works *Department is currently reviewing its Transportation* Master Plan. This review is expected to be complete in 2023. A new TMP will identify and prioritize major road projects over the plan's time horizon. Its approval may result in changes to projects noted in the table.
Project authorization date	City-wide	The existing table notes years in parentheses next to some infrastructure projects. These refer to the recommended year of detailed design and authorization as per the 2020 Infrastructure Plan, where applicable. These dates will be reviewed with departments over time as part of the Public Service's ongoing prioritization of proposed capital projects.
Wastewater servicing	South Transcona, northeast Winnipeg	The Water and Waste Department is currently investigating the performance and anticipated increased demands on the Northeast Interceptor (wastewater). The initial investigation is planned to be complete in late Fall 2022 and will provide further information on development opportunities and constraints. Should constraints be identified, development in lands serviced by the interceptor, including South Transcona, may be impacted until they are resolved and adequate regional servicing is in operation. The Public Service will await the results of this analysis before amending the Greenfield Development Opportunities and Constraints table, if necessary.

Topic	Implications for	Description
Wastewater servicing	South Transcona	Recent interest expressed in developing South Transcona suggested the precinct may develop to residential densities that are higher than previously anticipated. Depending on what is contemplated in a precinct planning process, there may be insufficient capacity in the Dugald wastewater interceptor. This process will have to demonstrate that a proposed development can be accommodated and/or identify necessary upgrades. Responsibility for cost will be determined once this engineering analysis is completed. The City currently does not have plans to upgrade the Dugald interceptor.
Wastewater servicing	Fort Whyte, Waverley West B, southwest Winnipeg	The conceptual design for the Southwest Interceptor is complete. Depending on the rate of growth within existing areas, current capacity limitations of the D'Arcy pump station could constrain or restrict growth in southwest Winnipeg, including in Waverley West B and Fort Whyte. These concerns will be alleviated with the construction of the Southwest Interceptor. Preliminary design is anticipated to be completed in late 2022 or early 2023, with detailed design planned for 2024. Once the Southwest Interceptor is in place, it can be removed as Anticipated Growth-Enabling Infrastructure, along with dependent greenfield sites.
Water and wastewater servicing	Airport Area West Residential & Industrial	The Preliminary 2022 Operating and Capital Budget, approved by Council on December 15, 2021, includes a one-third cost share of approximately $20 million towards the estimated total cost of approximately $60 million to provide water and sewer services for Phase 1A of the Airport Area West lands (see Figures 10-3 and 10-4), which includes both residential and industrial areas. The City's funding support is conditional on securing matching financial support from both Federal and Provincial governments. As of authorship, the Province of Manitoba has projected their contribution to be funded through the annual Strategic Infrastructure Basket funding in 2023, while discussions are ongoing with the Government of Canada. As further detailed in Figure 10-4[1], costs associated with Phase 1A represent just over half of all total servicing costs (in 2020 dollars).

Figure 10-2: Items being monitored for future versions of this report

[1] Source: Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering – Final Report

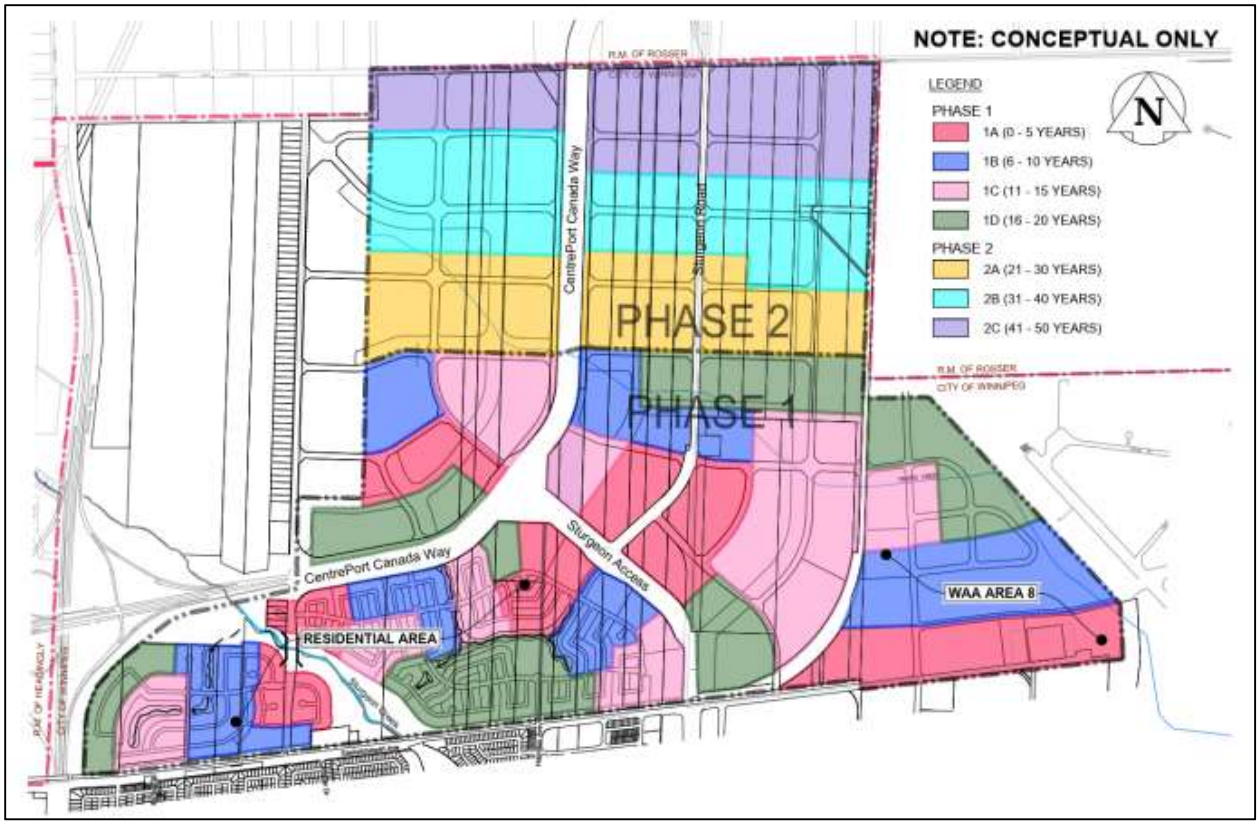

Figure 10-3: Servicing plan map, Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering – Final Report

Phase	Contract	Description	Total costs	% of total
Phase 1A (year 0)	1A	By-pass lift station	$59,980,171	53%
	2A	600mm force main		
	3	Interceptor and intake sewers		
	4A	750mm feeder main (Silver to OS3)		
Phase 1B (year 5)	1B	Lift station sub/superstructure and associated mechanical and electrical to support development for years 6-10	$16,942,753	15%
	5	400m secondary supply main		
Phase 1C (year 10)	1C	Lift station mechanical upgrades to support development for years 11-50	$22,063,642	20%
	2B	750m force main		
Phase 2 (year 20)	4B	750mm feeder main (OS3 to OS4)	$4,724,124	4%
Phase 3 (year 30)	6	Wastewater upgrades to the interceptor sewer	$8,862,980	8%
Total (Class 3) $2020 (excluding inflation			$112,574,000	100%

Figure 10-4: Phases of funding associated with servicing plan map, Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering – Final Report