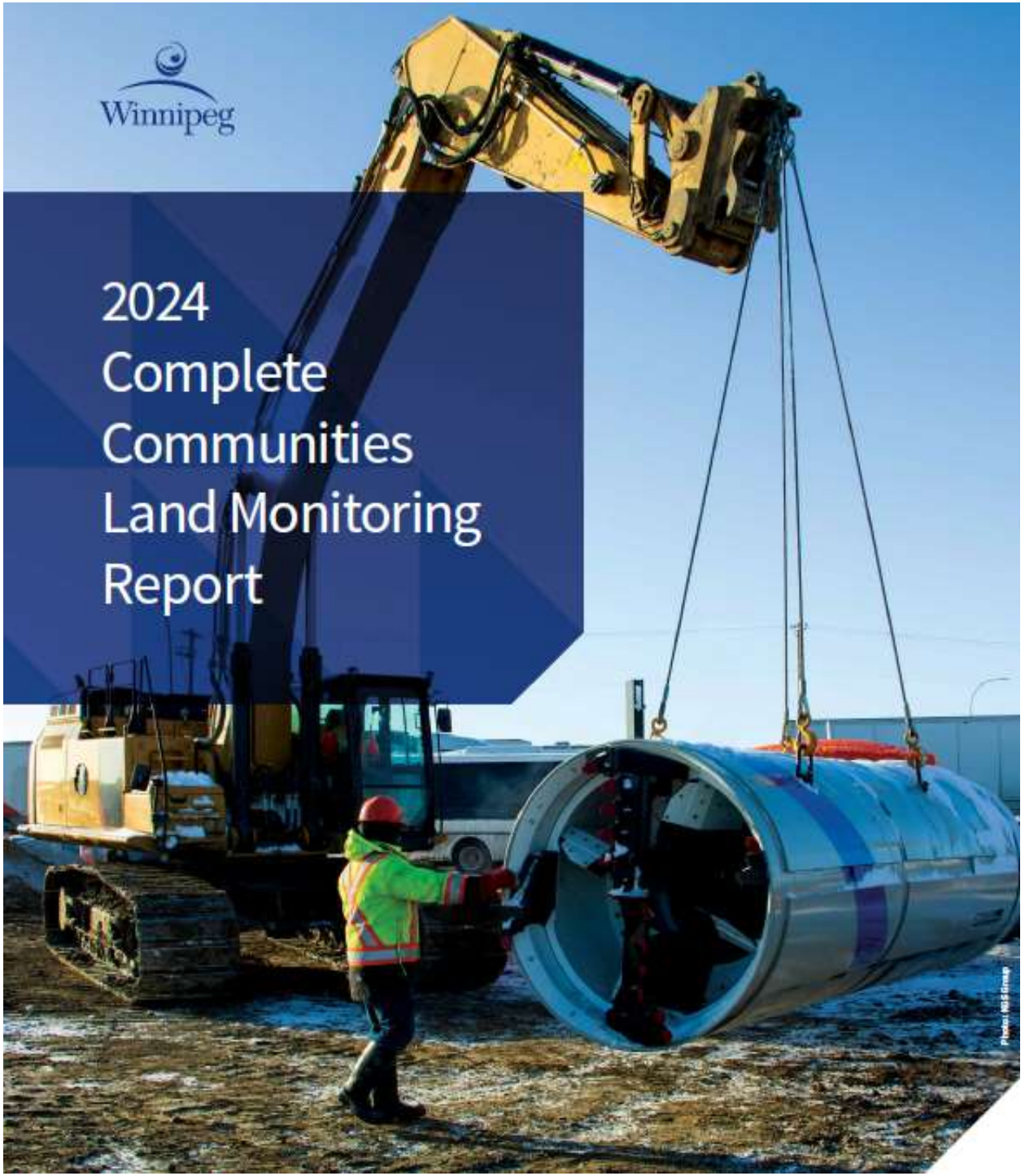


Report summary

Urban Planning & Design Division
Planning, Property, & Development

February 6, 2025

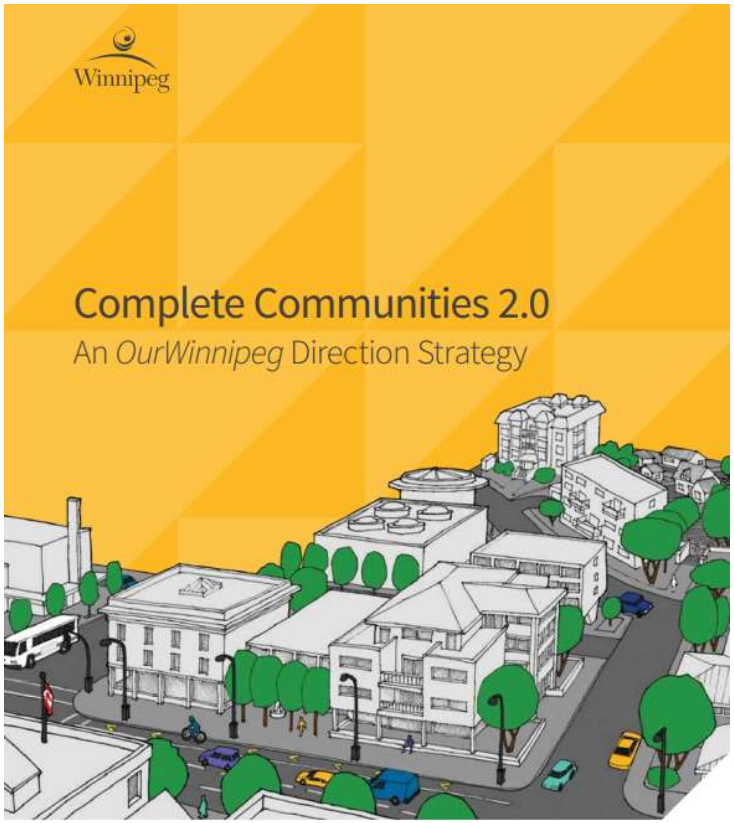
Annual reporting requirements

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; 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 B1, General Growth)

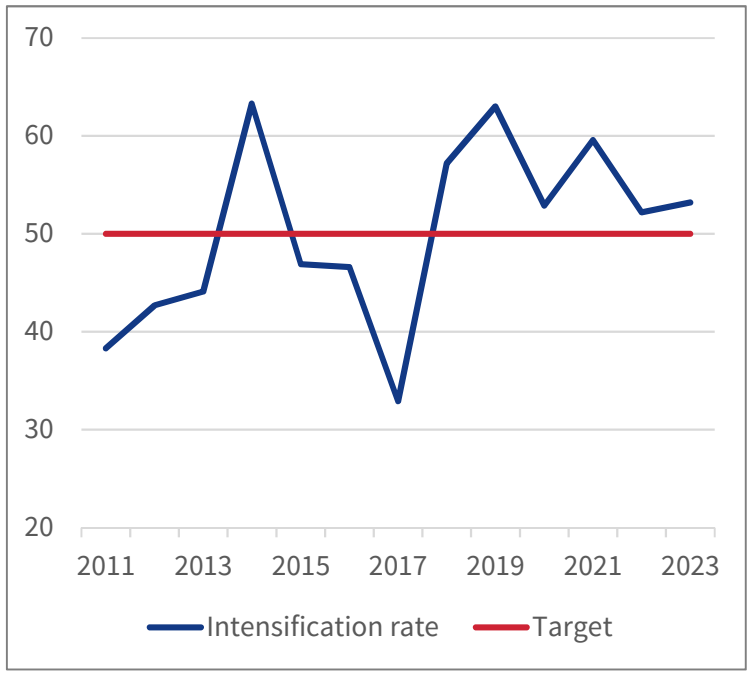


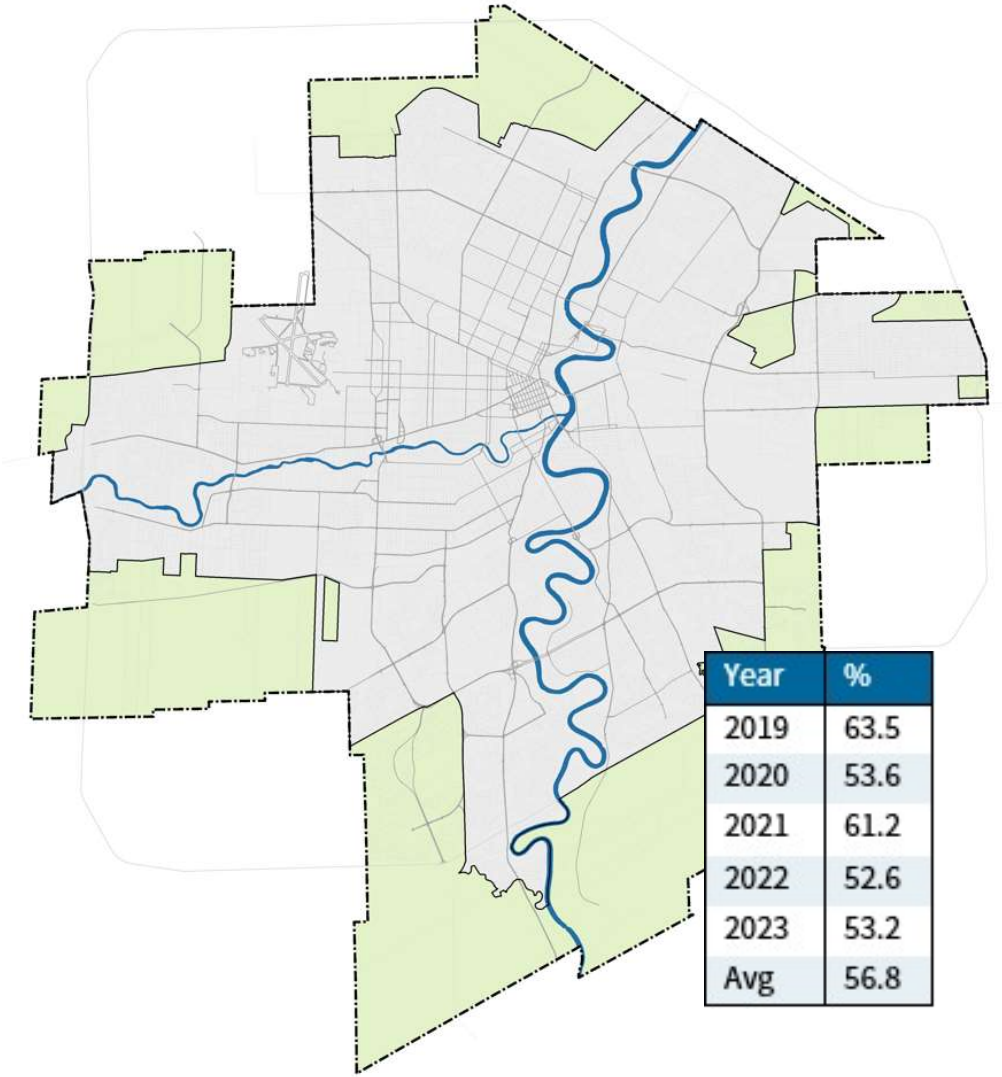
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Intensification target

Historic intensification rate

The City has surpassed its 50% target every year over the past five years, after having done so only once prior to 2018.



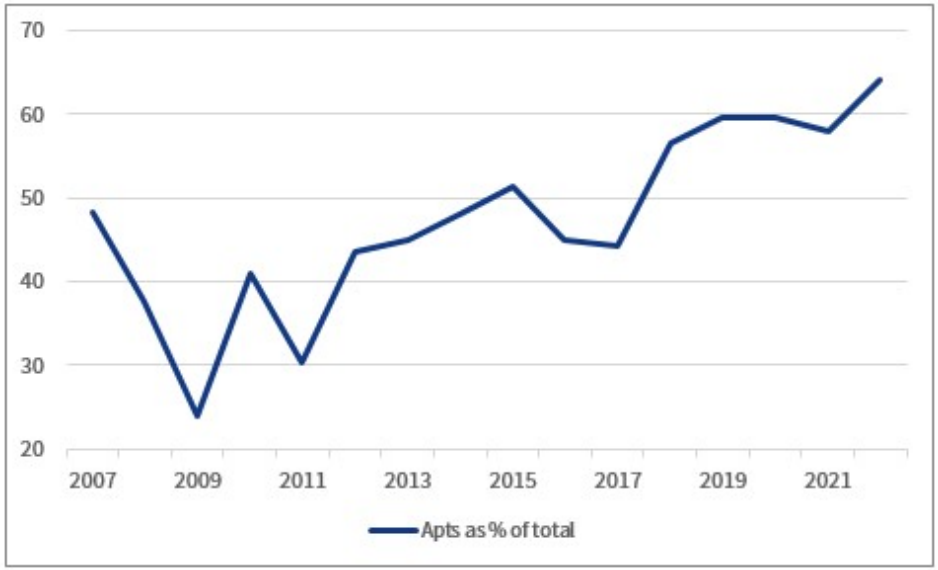


Year	%
2019	63.5
2020	53.6
2021	61.2
2022	52.6
2023	53.2
Avg	56.8

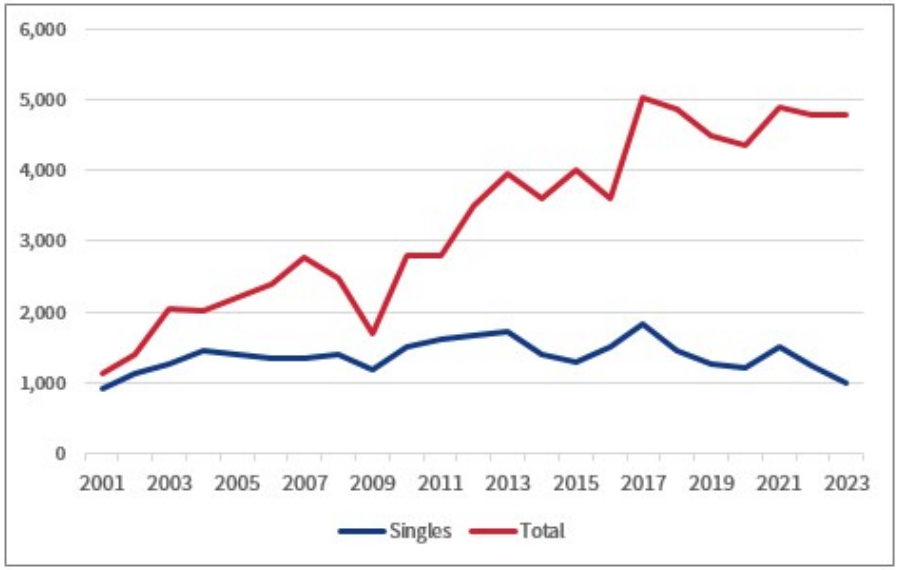
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Development by dwelling type

Apartments as % share of total units



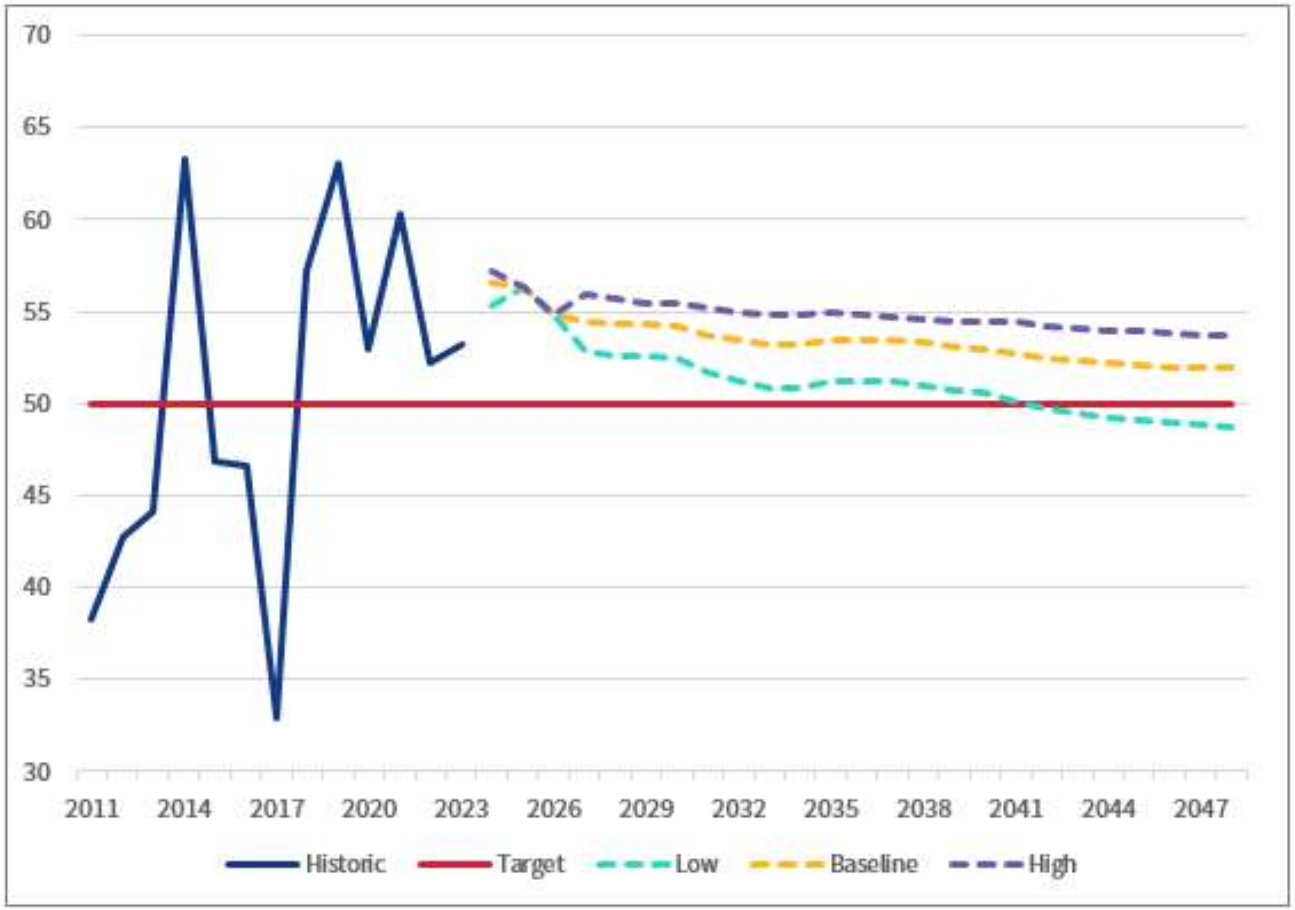
Singles and total units, 2001-23



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Intensification target

Forecasted intensification rate



Intensification target

Actions undertaken in the last year to achieve the intensification target

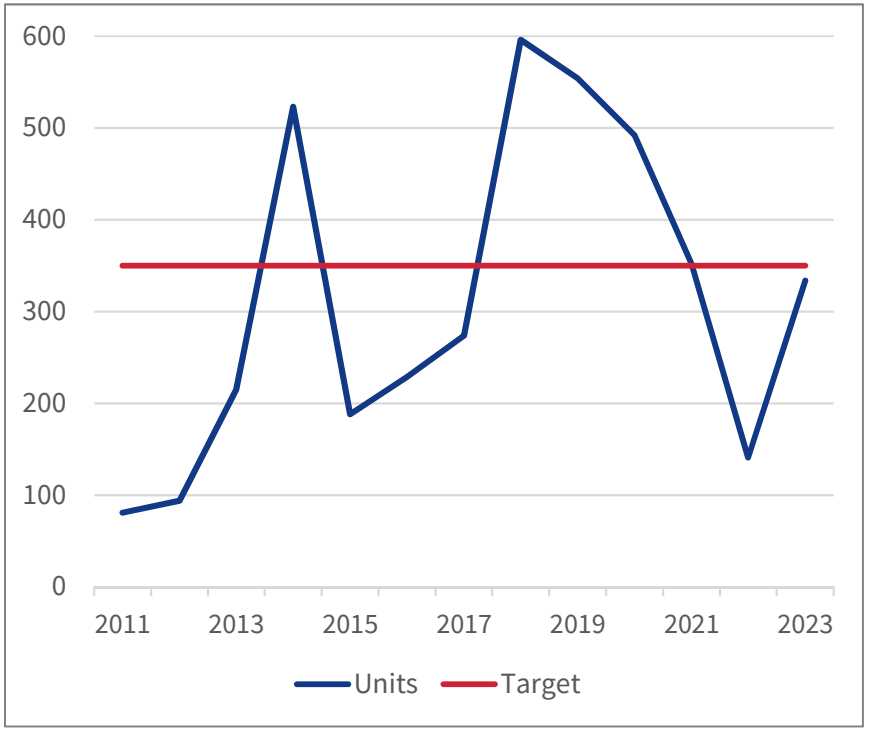
Initiatives include:

- Two and a half rounds of rapid zoning bylaw amendments
- Housing Accelerator Fund capital grant incentive program
- Approval of TIFs at Portage Place Mall and Rainbow Resource Centre Place of Pride project
- Funding of NEWPCC Phase 2: Biosolids Facilities
- Continued Primary Transit Network implementation planning
- Approval of CentrePlan 2050
- Near-completion of wastewater capacity study

Intensification target

Downtown intensification

- Goal: 350 units/year to 2030, and 500 units/year after
- 334 dwelling units in 2023
- An annual average of 375 dwelling units/year over the last five years.

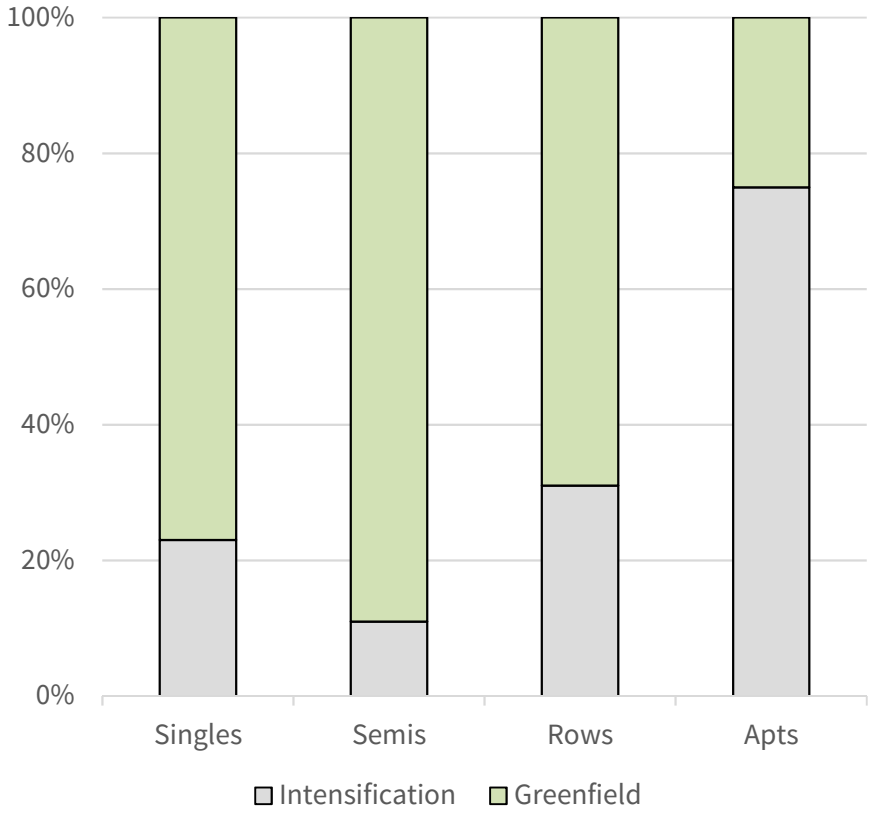


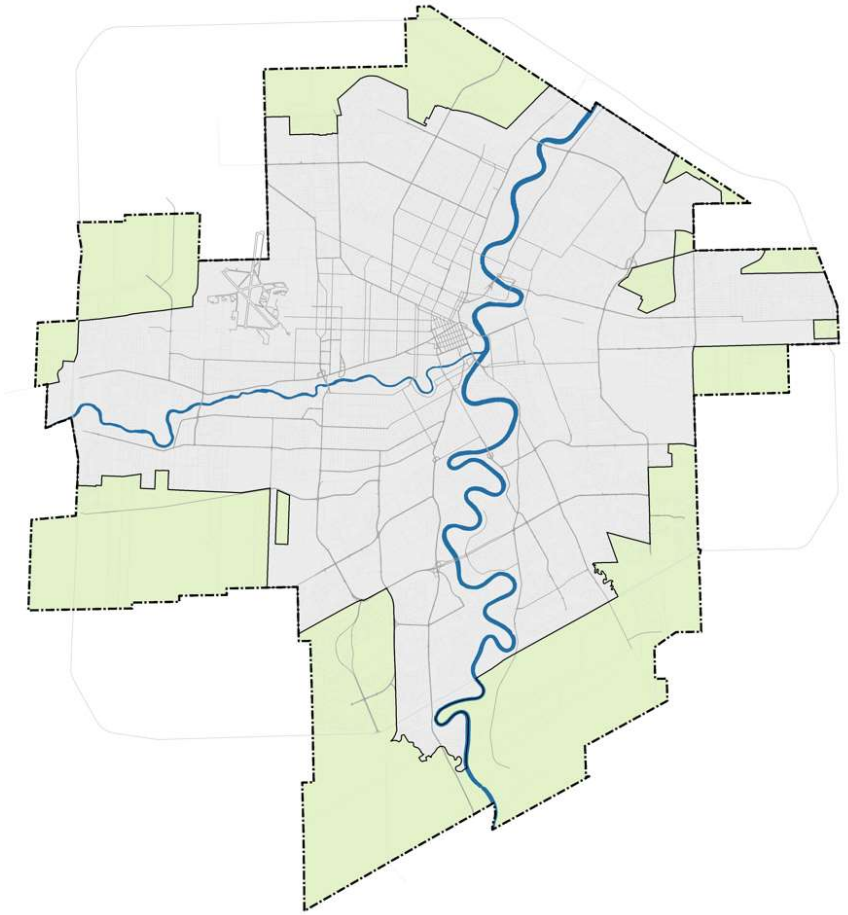




Development by dwelling type

Share of dwelling types, greenfield vs intensification, 2023



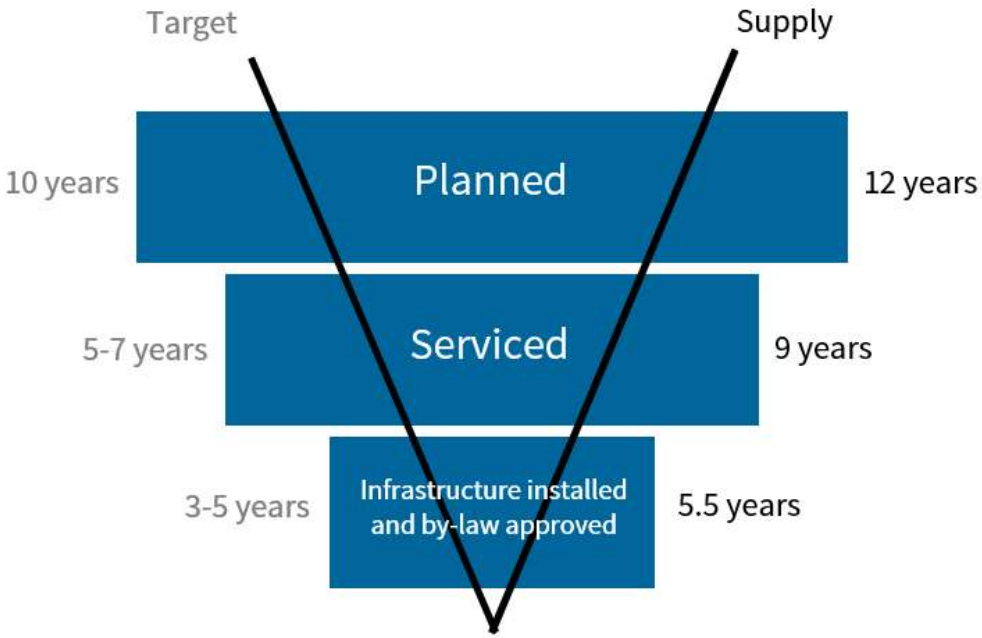


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Projected greenfield residential land supply

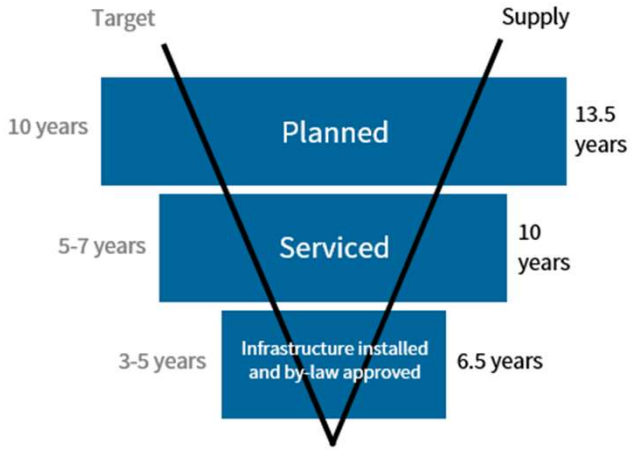
This year

The City of Winnipeg has a healthy supply of greenfield land, with supplies surpassing each of Council's three targets.



Last year

Losses through absorption were offset by gains in supply.



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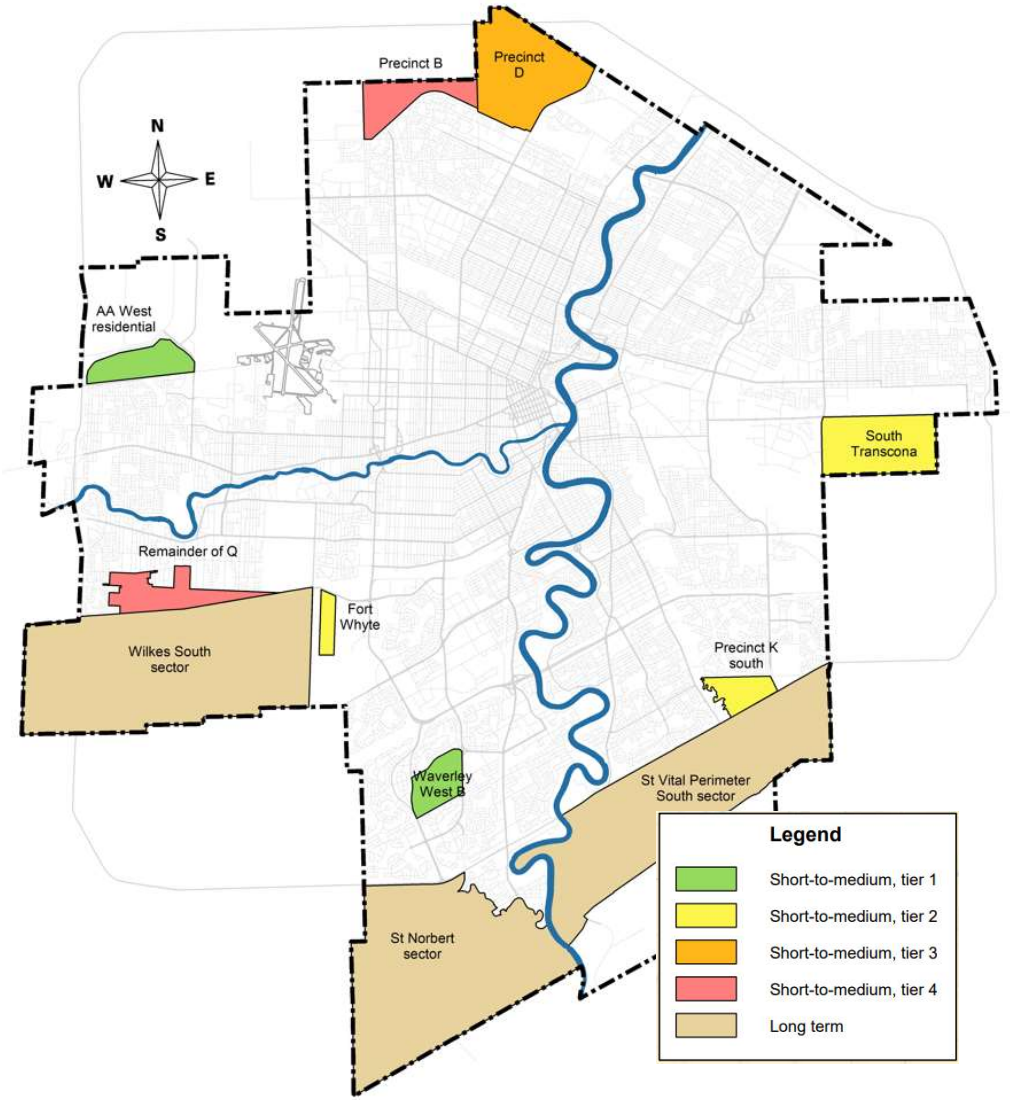
Projected greenfield residential land supply

Planned land supply

CCDS 2.0 recommends maintaining an approximate 10-year supply of planned greenfield land.

Based on this target, forecasted absorption, and recommended sequencing, Council should adopt the following plans in accordance with the following schedule:

Tier	Year plan should be adopted by Council
South Transcona	2026
Fort Whyte	2026
Precinct D	2029
Precinct B	2034



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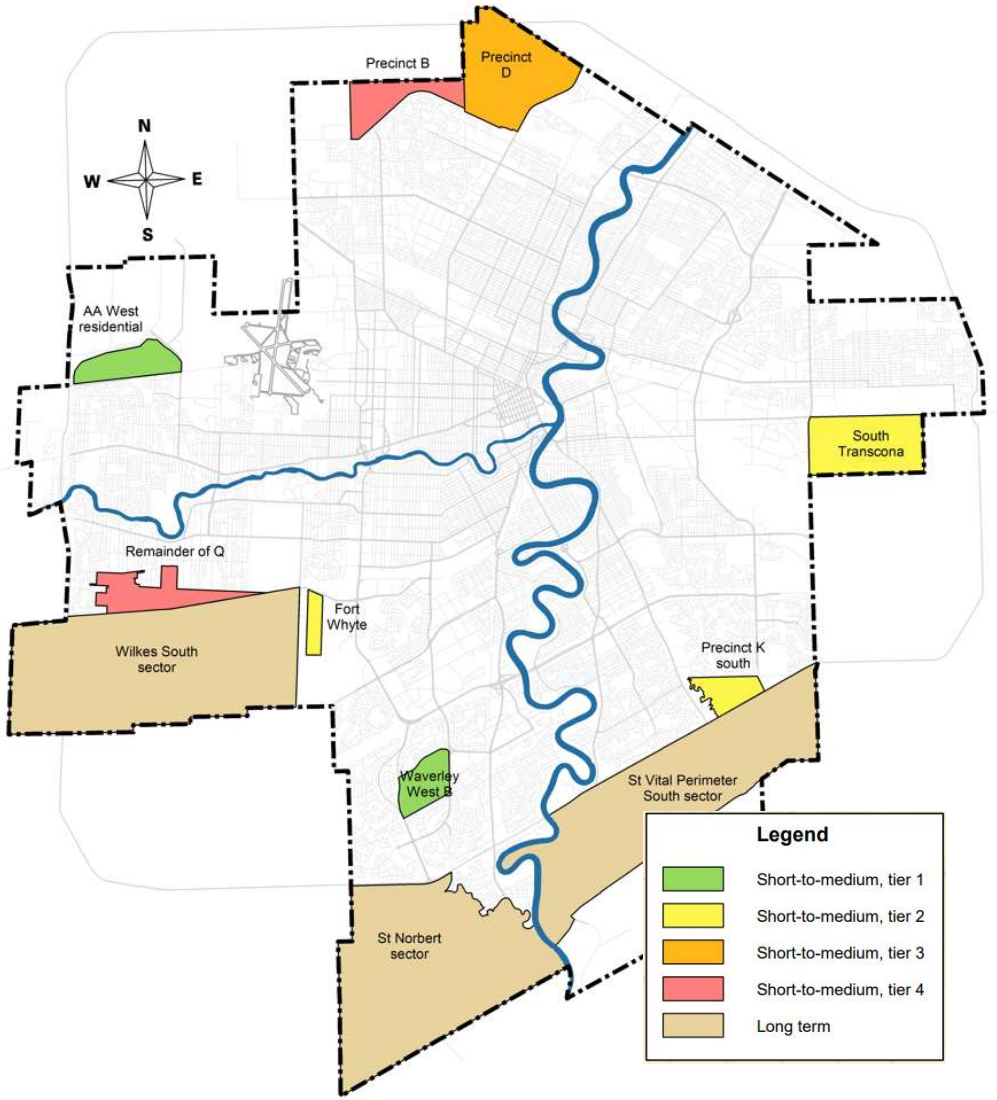
Projected greenfield residential land supply

Serviced land supply

CCDS 2.0 recommends maintaining a five-to-seven year supply of vacant serviced greenfield land, and a three-to-five year supply where infrastructure is installed and the subdivision by-law is approved.

Based on these targets, forecasted absorption, and recommended sequencing, Council should enable development in these sites through infrastructure investment by the following dates:

Tier	Year all G.E. infrastructure should be installed
Short-to-medium term, tier 2	2031
Short-to-medium term, tier 3	2035
Short-to-medium term, tier 4	2040
Long term	2042



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Greenfield Development Opportunities & Constraints

	Short-to-medium term				Short-to-medium term				Long term		
	AA West Residential	**Waverley West B**	**Precinct K South**	**Remainder Precinct Q**	**South Transcona**	**Fort Whyte**	**Precinct D**	**Precinct B**	**Wilkes South sector**	**St. Vital Perim. South sector**	**St. Norbert sector**
Quadrant	West	Southwest	Southeast	Southwest	Northeast	Southwest	Northwest	Northwest	Southwest	Southeast	Southwest
Potential Units	4,010	2,990	1,680	2,440	4,590	1,370	10,780	3,770	31,470	13,940	20,610
Precinct plan status	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required
Sector plan status	-	-	-	-	-	-	-	-	Sector plan required	Sector plan required	Sector plan required
Precinct plan priority	-	-	-	-	1	1	2	3	4	4	5
Sector plan priority	-	-	-	-	-	-	-	-	1	1	2
Servicing priority	1	1	2	4	2	2	3	4	5	5	6
Anticipated growth-enabling infrastructure	• CentrePort South Water and Sewer Servicing Phase 1A (funded) • Water and sewer servicing phases 1B+ • Share of NW wastewater interceptor system extension	• Share of Southwest Interceptor (funded)	• Share of Warde Ave extension	• Share of Clement Parkway (Grant to Wilkes)	None	• Share of Southwest Interceptor (funded)	• Share of Chief Peguis Trail (2027) • Share of NW wastewater interceptor system extension	• Share of Chief Peguis Trail (2027) • Share of NW wastewater interceptor system extension	• 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
Anticipated growth-supportive infrastructure	• Share of Silver Ave extension	• Share of Facility Optimization – WW (fire) station (funded) • Share of So. Wpg Rec Campus Ph. 1 (funded) • Share of So. Wpg Rec Campus: Aquatic (2028) • Share of So. Wpg Rec Campus: Arena (2027) • Share of So. Wpg Rec Campus: Library (2028) • Share of Bison Dr extension	• Share of SE Nhbd Rec & Leisure Centre (2028) • Land acquisition for SE Wpg Regional Rec & Aquatic Centre (2030) • Share of SE Wpg Regional Rec & Aquatic Centre (2036)	None	• Share of East of Red RecPlex (2026) • Community/ rec centre • Fire station • Share of Plessis widening • Share of Dugald widening	None	• Land acquisition for NW Wpg Regional Rec & Aquatic Centre (2030) • Share of NW Wpg Regional Rec & Aquatic Centre (2036) • Share of library • Fire station	• Share of NW Wpg Regional Rec & Aquatic Centre (2036) • Share of community/rec centre • Share of library • Outdoor aquatic park	• Community/rec centres • Library • Fire station • Sterling Lyon extension	• Share of SE Wpg Regional Rec & Aquatic Centre (2036) • Share of library • Fire station	• Share of So. Wpg Rec Campus Ph. 1 (funded) • Share of So. Wpg Rec Campus: Aquatic (2028) • Library
Site dependencies	None	None	None	Wilkes South sector plan needed before Clement Parkway can be planned as per Council motion Dec. 13, 2017	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.
Land assembly requirement	Some assembly	More assembly	More assembly	More assembly	More assembly	Assembled	Some assembly	Some assembly	More assembly	More assembly	Some assembly
Primary Transit Network	No planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	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.				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.		

Projected industrial land supply

Industrial land supply as of January 1, 2024:

	Category	Regionally serviced		Designated	Intensification potential
		Shovel-ready, unencumbered	Locally unserviced[1]		
Supply	Net supply (ac)	308	568	2,383	857
Forecast	Land need, 2022-51 (ac)	1,808			
	Shortfall	-1,436	-1,232	+640	n/a
	Years supply	5.3	8.8	41.0	14.7
	Last year	5.6	9.3	39.5	12.9

Implications

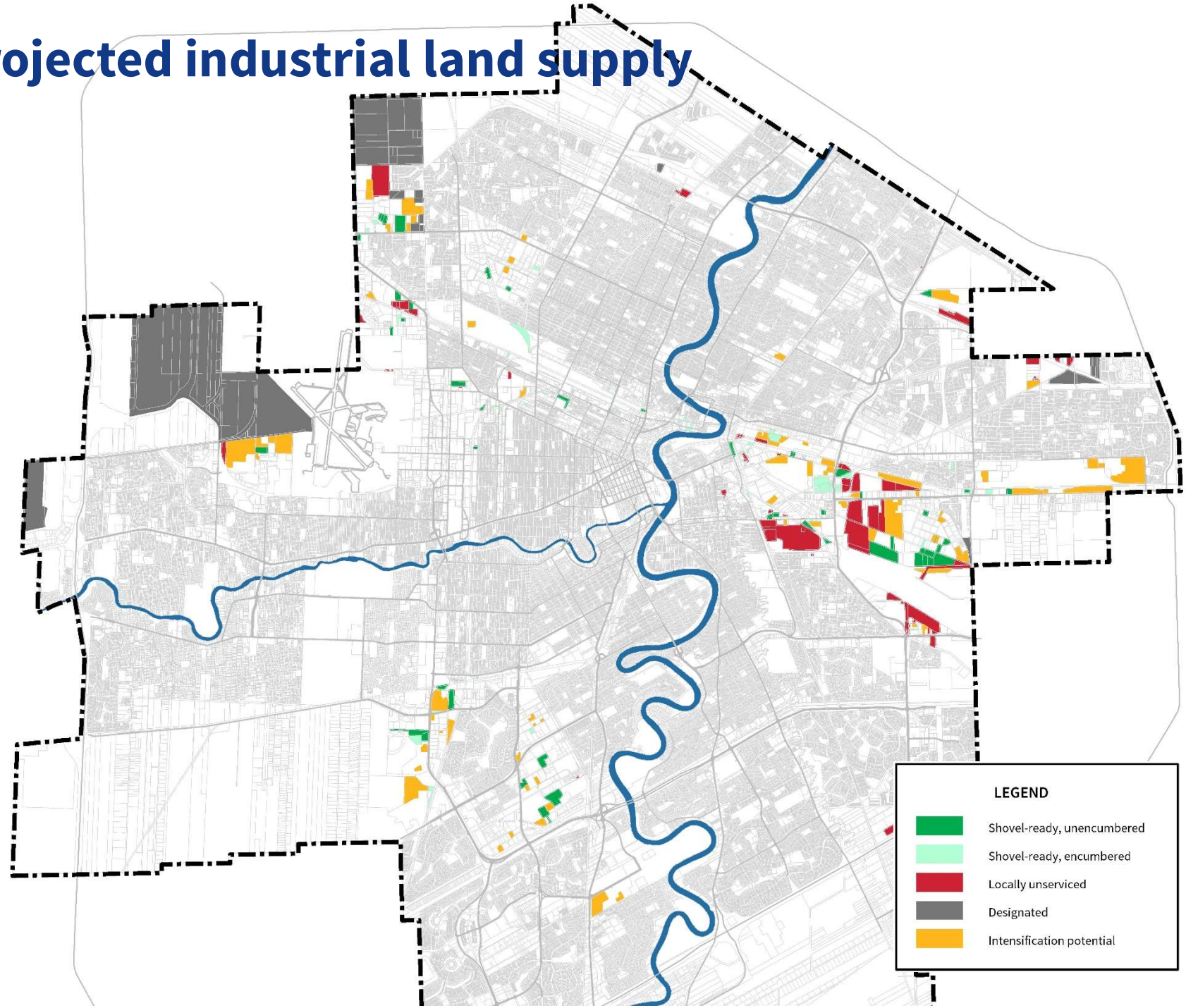
This supply may appear reasonable at first glance. However:

- Industrial demand is much more sensitive to user preferences.
- Much of its land may not be marketed at a given time or held by a property owner willing to sell.

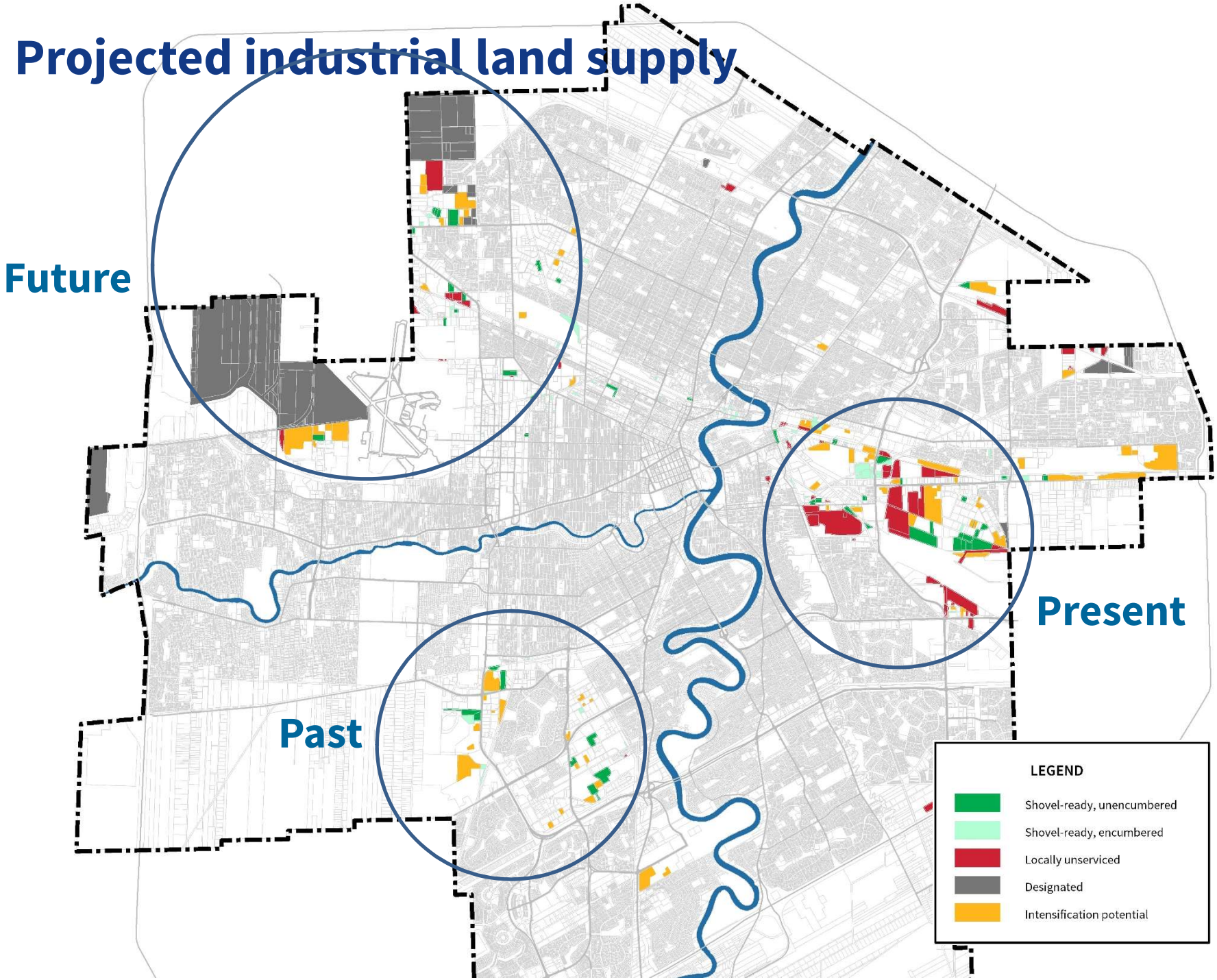
Until services are installed in CentrePort South, the City's industrial land supply should be considered constrained.

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Projected industrial land supply



Projected industrial land supply

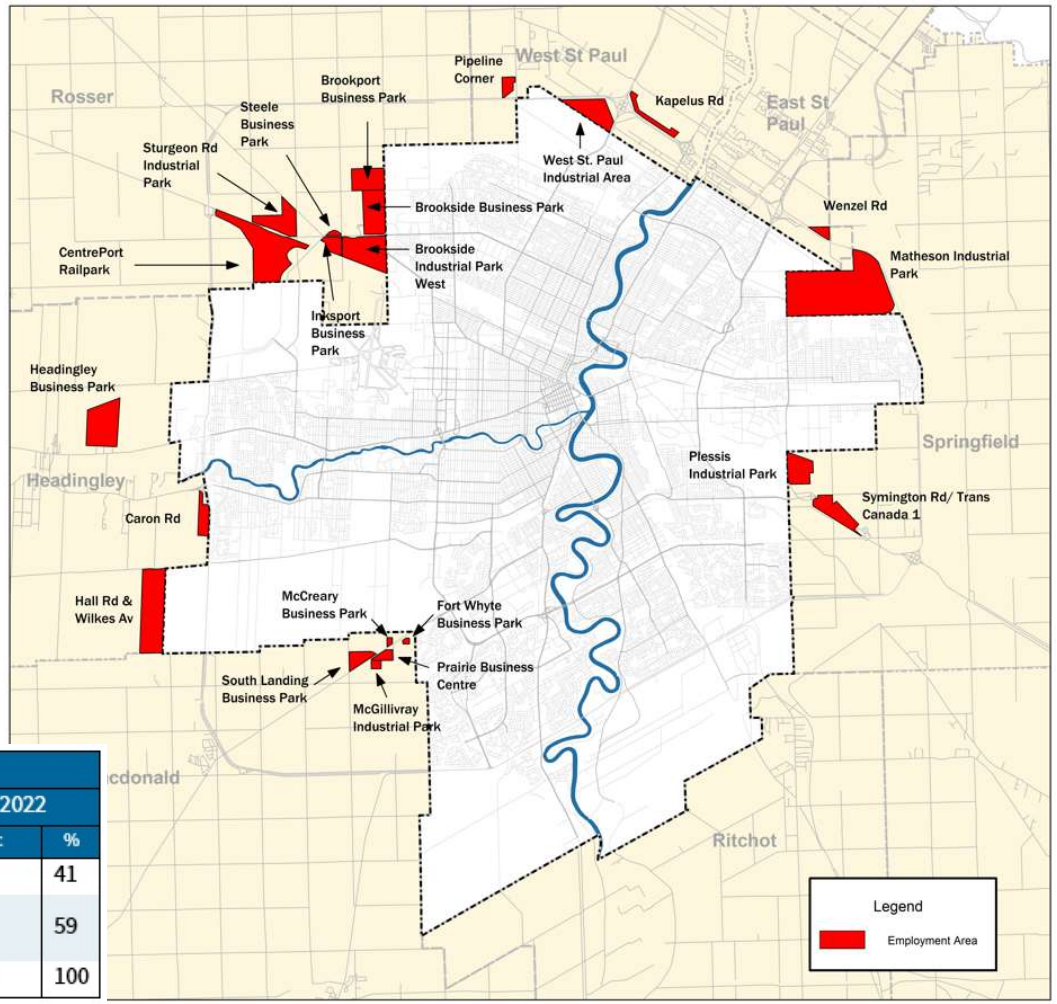


Industrial land absorption

Vacant industrial land absorption, City and select Capital Region employment areas

Municipality	2011-16	2017-20	2021	2022
	Annual avg. (ac)	Annual avg. (ac)	Land absorbed (ac)	Land absorbed (ac)
City of Wpg	35	66	38	63
East St Paul	0	0	5	11
Headingley	10	25	30	27
Macdonald	7	9	10	10
Rosser	22	41	87	41
Springfield	7	13	13	2
West St Paul	3	7	11	0

Jurisdiction	Land absorption							
	2011 to 2016		2017 to 2020		2021		2022	
	Ac	%	Ac	%	Ac	%	Ac	%
City of Wpg	213	35	264	41	38	20	63	41
Selected Capital Region	395	65	379	59	156	80	91	59
Total	608	100	643	100	183	100	154	100



Projected commercial land supply

Commercial land supply as of January 1, 2024:

	2023	2022
Total commercial supply, ac (ha)		
Vacant commercial-zoned	330 (134)	360 (146)
Approved but non-vested in RMU Centres and Emerging Sites	172 (70)	172 (70)
Cont'd build-out in RMU Centres and Emerging Sites	52 (21)	49 (20)
Total	554 (224)	578 (234)
Forecasted demand to 2041, ac (ha)		
Forecasted demand	370 (150)	392 (159)
Shortfall/surplus	+184 (75)	+189 (77)
Forecasted annual absorption	22 (9)	22 (9)
Years supply	26 years	27 years

Implications

Results affirm continued persistence of an oversupply of commercial land. 2018 ECLS warned this may limit retail intensification.

Non-commercial developments on commercial lands to be expected (e.g. Polo Park, Taylor Lands).

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Summary of main findings:

1. **The City has exceeded its 50% intensification target in each of the last five years; this can be expected to continue going forward.**
2. **The City has a healthy supply of vacant greenfield residential land.**
3. **The City has a constrained supply of vacant industrial land; this will be alleviated when CentrePort South comes on-line.**
4. **The City has an oversupply of vacant commercial land; non-commercial development should be expected.**

Follow up?

Contact Michael Pyl, Growth Management Coordinator, at: mpyl@Winnipeg.ca.