Winnipeg

2024 Complete Communities Land Monitoring Report

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1. Executive Summary

The *2024 Complete Communities Land Monitoring Report* 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* (CCDS) policy, it is required to be updated annually, being critical to monitor and inform the plan's implementation. Development activity trends and land supplies described throughout the report are accurate as of January 1, 2024.

In 2023, 53% of all permits issued for the construction of new residential dwelling units were located in the intensification target area, while the last five years has seen an annual average of 57%. In fact, the City has exceeded CCDS' 50% target in each of the last five years. Based on the City's most recent 25-Year Population, Housing, and Employment Projections released in 2024, its intensification rate can be expected to surpass 50% over the next 25 years. In 2023, permits were issued for the construction of 334 dwelling units Downtown. While this fell short of CCDS 2.0's 350-unit target, the City has averaged 375 units per year over the last five years. These intensification rates can be largely attributed to increased multifamily development relative to historical averages.

In 2023, 73% of new residential units were accommodated in apartment dwelling types, as opposed to 18% in single-detached, 4% in semi-detached and 5% in rowhouse dwellings.

The City of Winnipeg continues to have a healthy supply of vacant greenfield residential land, with its supplies exceeding all targets in CCDS 2.0. The City has an estimated 12 year supply of vacant planned land (compared to its 10-year target), 9 years of vacant serviced land (compared to a target of five-to-seven years), and 5.5 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). These figures represent a decrease of approximately a year from these figures provided in last year's report.

These greenfield land supplies and targets should serve as the basis for the timing of future precinct planning processes and growth-enabling infrastructure, which will be needed over time to maintain this healthy supply. But while a healthy supply is needed 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 to help manage competing demands for limited City-funded growth-enabling and -supportive infrastructure, planning resources, and City operating costs.

This report identifies 308 acres of unencumbered, shovel-ready vacant industrial land in the City of Winnipeg. This translates into 5.3 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 as it relates to the City's stated aims of accommodating forecasted industrial growth and promoting 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 land need at a given time. To some extent, the City's existing supply may not be desirable to potential users or available for purchase or lease at a given time. Additional supply stands to be added with the servicing of the first phase of CentrePort South, which is expected to be in place in 2026.

This report identifies 554 acres of vacant commercial land in the City of Winnipeg, representing 26 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].

The report concludes with a growth management section to link the City's development activity and land supplies with CCDS 2.0 implementation. The first subsection describes actions undertaken by the City in the past year to help achieve the intensification target. Actions include financial incentives, infrastructure investment, and planning. The second subsection provides an update to the Greenfield Development Opportunities and Constraints table. Included in the Appendix of CCDS 2.0, it helps communicate and implement greenfield phasing policies by highlighting vital information to guide future decision-making, including anticipated City infrastructure investments. The third subsection forecasts the recommended timing of growth-enabling infrastructure and plans in order to maintain healthy residential land supplies achieve Council targets.

Growth forecasts considered the 2024 update of the *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area*, prepared by the City of Winnipeg's Office of Economic Research. Each of the scenarios contemplated in this forecast reflect the City's minimum housing supply growth target required by its Housing Accelerator Fund agreement with the Government of Canada, which requires the City to permit an additional 5,277 housing units between 2024 and 2026 beyond what would otherwise be projected.

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

2. Introduction

The *2024 Complete Communities Land Monitoring Report* 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* (CCDS), 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 CCDS' 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 1.1, General Growth).

More specifically, it is a direct response to Policy 5.2 of the General Growth section, 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. A significant input is the City's 2024 update of the *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area*, which was released in Q3 2024. Its baseline scenario forecasts the City of Winnipeg to reach a population of 1,017,200 people by 2048, during which it can be

expected to accommodate approximately 101,000 new dwelling units. Additional demand forecasts based on based on recent development trends were also considered.

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 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. Owing to this, there may be discrepancies between this, past, 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* (CCDS) compliments and builds on the vision established in OurWinnipeg 2045 by guiding growth, development, and land use with a much greater level of detail. CCDS 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.

CCDS policies related to land monitoring activities are described in Figure 3-2 below. Specific direction for this report is provided by Policy B1.5.2 (General Growth).

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.
Financing Growth	**Capital projects** 2.1 Understand and plan for the full lifecycle cost of capital investments and services in advance of development approval and capital procurement. 2.1.1 Align and prioritize City investment in capital projects based on the strategic priorities of the City as outlined in OurWinnipeg, this By-law, the Infrastructure Plan, the capital budget, and on the overall fiscal realities identified through the budget process.

Section	Policy
	2.1.2 Align capital project planning with the development priorities and phasing policies of this By-law. 2.1.3 Identify and evaluate each capital project to determine its growth-related components and the City's share of costs.
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

4.0 Recent Industry Consultation

4.1 Engagement on 2024 Report

In Spring 2024, the Urban Planning & Design (UP&D) Division sought feedback on draft greenfield land supply findings from the Urban Development Institute of Manitoba (UDI), where a series of one-on-one correspondences with developers led to forecast refinement.

Also in Spring 2024, the UP&D Division provided a memo summarizing draft non-residential land supply findings to stakeholders. This sparked individual correspondences with respondents. Feedback received included:

- As has been the case in past discussions, some concern was raised over how this report defined "absorption" of vacant industrial land, noting inconsistencies with how this term is commonly used in commercial real estate. This is discussed further in 4.2 below.
- Market interest for vacant industrial land is stronger in commercial centres with close proximity to the Perimeter Hwy. Land located in the City of Winnipeg without this proximity is not as desirable, even at similar price points.
- Questions were raised on the comprehensiveness of summaries of active vacant industrial listings.
- One stakeholder analyzed the vacant industrial land inventory provided in depth. This analysis led to the addition of 21 Intensification Potential entries and one Vacant Serviced entry. Some differences between analyses were attributable to different parcel datasets, the timing of removing and/or adding parcels resulting from permit issuance and/or the coming into force of new rezonings, inconsistencies in defining different industrial supply categories.

4.2 Summary of Feedback from Previous Consultation Periods

Previous discussions with UDI on this work's residential land supply findings have generally helped refine land that should be considered undevelopable, reconcile differences in City and UDI site supply forecasts with the intent of understanding rationales, and refined reporting items. More specifically, previous UDI feedback resulted in the following changes:

- 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.

Non-residential industry stakeholders have previously emphasized the following themes in previous consultations:

- Stakeholder feedback has often drawn attention to the differences in how industrial land absorption may be defined. These differences are driven by the goals of different analyses. This report defines absorption as the point in time in which a vacant parcel is built upon, as this is the most pertinent indicator in measuring land supply. Conversely, real estate professionals define absorption as the sale of land, as that is of greatest interest to their work. Both are legitimate measures depending on intent.
- Relatedly, concern was previously expressed that the City's approach in quantifying industrial land absorption, whereby large sites are considered to be absorbed even if development occurs on only a small portion of the lot, may overrepresent development activity. Additional analyses on "adjusted absorption" as well as quantifying intensification potential have been added in previous reports to address these concerns.
- Stakeholders previously expressed concern that this work's identified industrial land supply overrepresents land that may be available for development in that only a limited amount may be available for purchase at a given time. The UP&D Division agrees with this assessment, and have added a summary of available marketed lands at a point in time to help quantify this. This summary includes lands in adjacent Capital Region employment areas to better understand the regional context.
- Stakeholders have previously asked if Winnipeg's results had been compared to other cities in different regions of the country. While the 2018 ECLS did this to an extent, this is beyond the scope of this annual report.
- Consistent with previous messages the City has received dating back to the 2018 ECLS, some stakeholders stressed the importance of regional collaboration in the accommodation of employment, and that the City should not adopt an overly protectionist and/or zero-sum position.
- Stakeholders have reiterated that the City is at a competitive disadvantage with Capital Region municipalities with regards to speed and certainty of approvals.
- There was discussion on the challenges associated with measuring non-residential development, including distinguishing non-residential development that relocates existing jobs versus creating new ones. Stakeholders noted that the age of the City's

industrial building space inventory as well as vacancy rates should be recognized in relation to demand for more modern features.

On March 24, 2022, Council directed the Public Service to report on how to best align development processes, costs, and timelines between the portions of CentrePort in Winnipeg and Rosser in an effort to promote economic competitiveness. As a result, the UP&D Division conducted stakeholder interviews in Spring 2023, which yielded some pertinent general commentary about industrial development in Winnipeg[1]:

- Winnipeg's higher servicing standards (concrete curb-and-gutter roads and piped land drainage) hinder its competitiveness against adjacent Capital Region municipalities.
- Adjacent Capital Region municipalities are able to provide better concierge-type service, helping applicants navigate approvals processes with single points of contact.
- Some stakeholders expressed concern about limited wastewater treatment capacity (which will also have implications on development in nearby RMs that have entered into service sharing agreements with the City).
- Some stakeholders expressed concern about the phased servicing of Airport Area West. They suggested that built-up demand may exceed the available capacity of the first planned phase, raising concern over its equitable distribution. Stakeholders also expressed concern over a lack of certainty in second phase funding.

[1] The results of this work were provided to Standing Policy Committee on Property and Development on September 18, 2023.

5.0 Residential Development Activity

5.1 Intensification Target

In 2023, 53% 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* (CCDS) and shown in Figure 5-3 below. For each of the last five years, the City has exceeded CCDS' 50% target.

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

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

Prior to 2018, the City had only exceeded 50% intensification once between 2011 and 2017. Of note is that there may still 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.

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.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	5 yr avg
Greenfield	61.0	56.7	55.7	36.4	53.0	53.1	66.9	42.6	36.9	46.8	40.3	47.7	46.8	43.6
Intensification	38.3	42.7	44.1	63.3	46.9	46.6	32.9	57.2	63.0	52.9	59.6	52.2	53.2	56.3

Notes:

- Figures are gross and do not account for demolitions.
- Greenfield figures are the sum of new dwelling units in Emerging and New Communities. Minor differences between this table and Figure 5-1 above are attributable to minor mapping discrepancies where there is overlap between Emerging Communities and Intensification Target area boundaries.
- 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

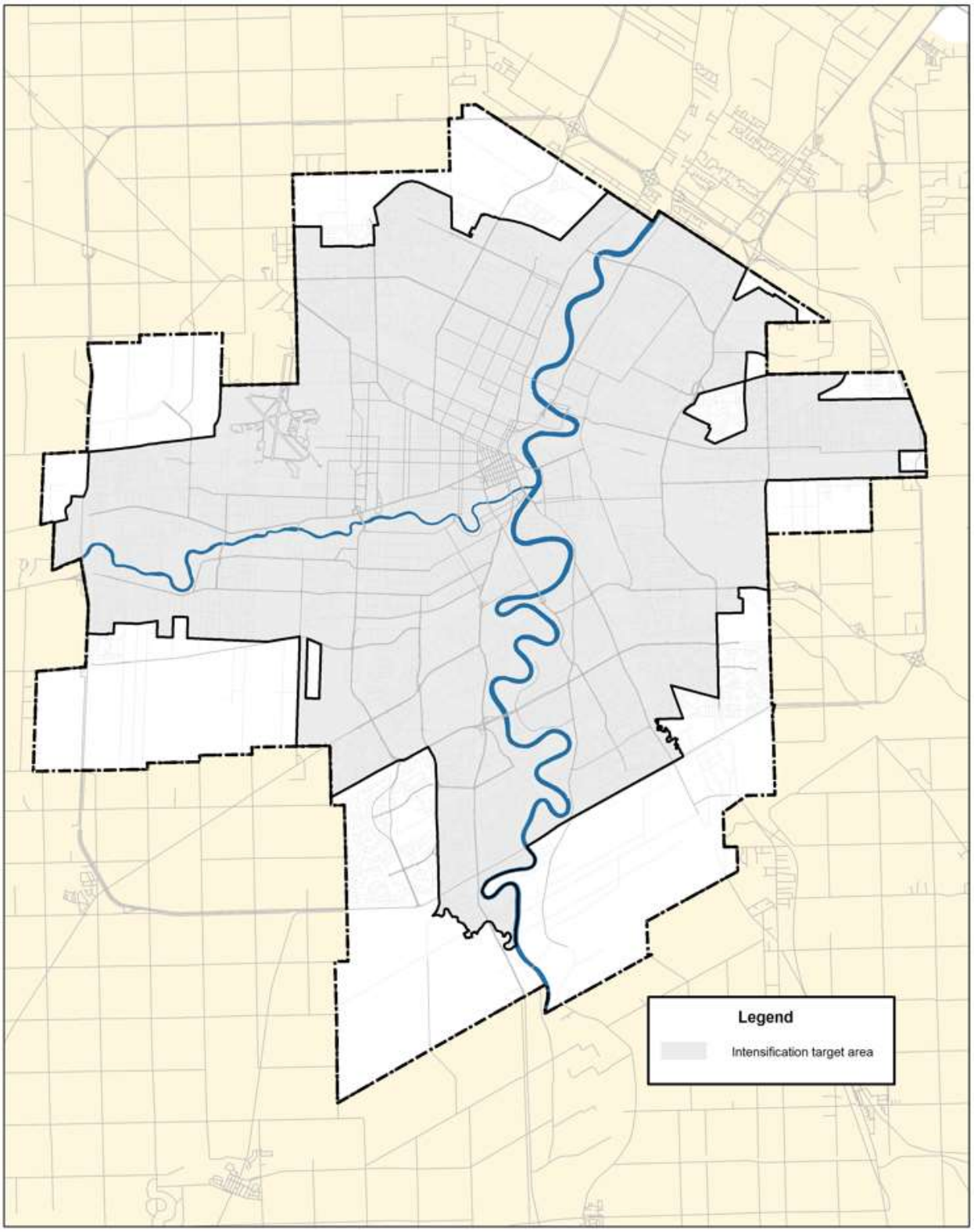

Figure 5-3: Intensification target area

This increased level of intensification relative to CCDS' intensification target can be largely explained by the increased development of multifamily units relative to the *2016 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.

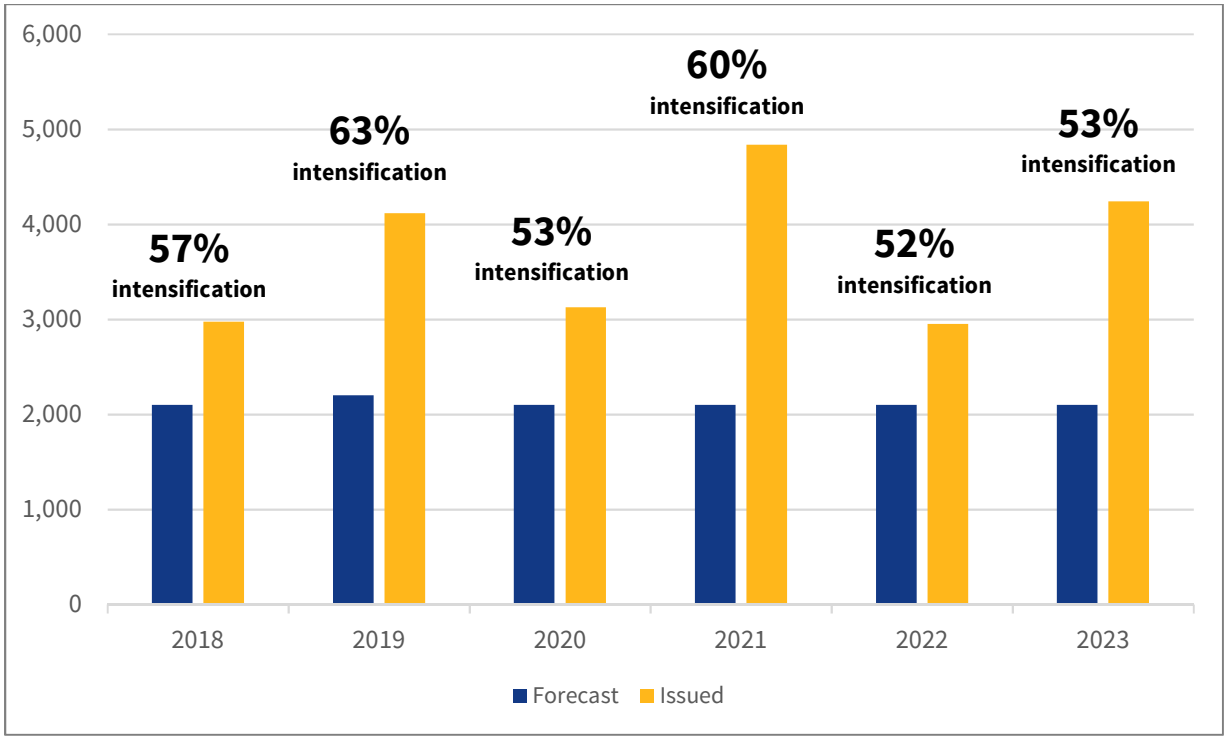

Figure 5-4: Forecasted and issued new multifamily residential dwelling units in relation to intensification rates

The City's *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area*, released by the Office of Economic Research in August 2024, produces a Low, Baseline, and High housing start forecast, dividing dwelling units into single and multi-family dwellings. Assuming the forecasted multifamily dwelling units are divided into more specific dwelling type categories (as defined in Section 5.3) in accordance with recent historical trends, and then these dwelling unit types are distributed to greenfield and infill areas also in accordance with these trends (see Figure 5-16), an intensification rate forecast can be produced. As illustrated in Figure 5-5 below, the City's 2024 housing forecast would expect intensification rates to consistently surpass its 50% target over the next 25 years.

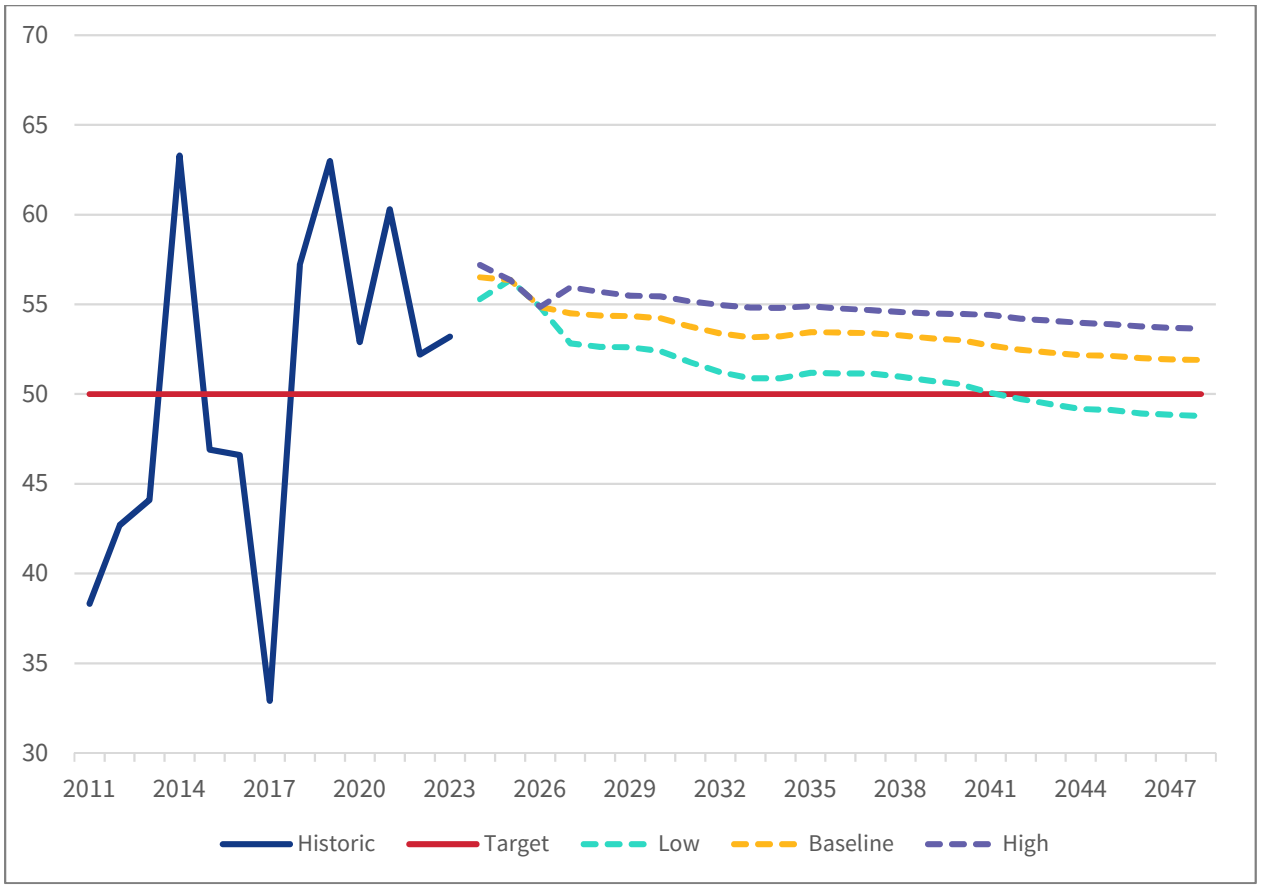

Figure 5-5: Forecasted intensification rate to 2048 based on 2024 City of Winnipeg Population, Housing, and Employment Projections

CCDS 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.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	5 yr avg
Downtown	81	94	215	523	188	229	274	596	554	492	352	141	334	375

Figure 5-6: Permits issued for new residential units Downtown, by year

5.2 Development Activity by Urban Structure

The tables below indicate residential development activity on both total and percentage share bases in relation to the Urban Structure of CCDS 2.0 (Figure 5-11). As opposed to Housing Accelerator Fund reporting provided to Executive Policy Committee every month, which consider approved development applications as well as issued development and building permits, these dwelling units only represent the latter.

	2019	2020	2021	2022	2023	Avg.
CITY TOTAL	5,451	4,310	6,473	4,168	5,163	5,113
Greenfield development	**1,994**	**2,017**	**2,606**[1]	**1,989**	**2,415**	**2,204**
Emerging Communities	1,994	2,017	2,606	1,989	2,415	2,204
New Communities	0	0	0	0	0	0
Intensification	**3,453**	**2,282**	**3,860**	**2,174**	**2,745**	**2,863**
Downtown	554	492	352	141	334	375
Major Redevelopment Sites	132	452	793	394	416	437
Corridor frontage	768	30	698	405	200	420
Urban Corridors	133	30	293	142	200	160
Regional Corridors	635	0	405	263	0	261
Established Neighbourhoods	1,999	1,308	2,017	1,234	1,795	1,671
Mature Communities	1,164	776	816	636	759	830
Recent Communities	835	532	1,201	598	1,036	840
Rural Agricultural	**4**	**11**	**7**	**5**	**3**	**6**

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

	2019	2020	2021	2022	2023	Avg.
Greenfield development	**36.6**	**46.8**	**40.3**	**47.7**	**46.8**	**41.4**
Emerging Communities	36.6	46.8	40.3	47.7	46.8	41.4
New Communities	0	0	0	0	0	0
Intensification	**63.3**	**52.9**	**59.6**	**52.2**	**53.2**	**58.5**
Downtown	10.2	11.4	5.4	3.4	6.5	10.1
Major Redevelopment Sites	2.4	10.5	12.3	9.5	8.1	8.0
Corridor frontage	14.1	0.7	10.8	9.7	3.9	6.8
Urban Corridors	2.4	0.7	4.5	3.4	3.9	2.1
Regional Corridors	11.6	0.0	6.3	6.3	0.0	4.6
Established Neighbourhoods	36.7	30.3	31.2	29.6	34.8	33.8
Mature Communities	21.4	18.0	12.6	15.3	14.7	17.9
Recent Communities	15.3	12.3	18.6	14.3	20.1	15.8
Rural Agricultural	**0.1**	**0.3**	**0.1**	**0.1**	**0.1**	**0.2**

Figure 5-8: Share of permits issued for the construction of new residential dwelling units, by Complete Communities 2.0 Urban Structure

[1] Previous reports reported 2,548 Greenfield units and 1,259 Recent Communities units, where the difference had been erroneously attributed.

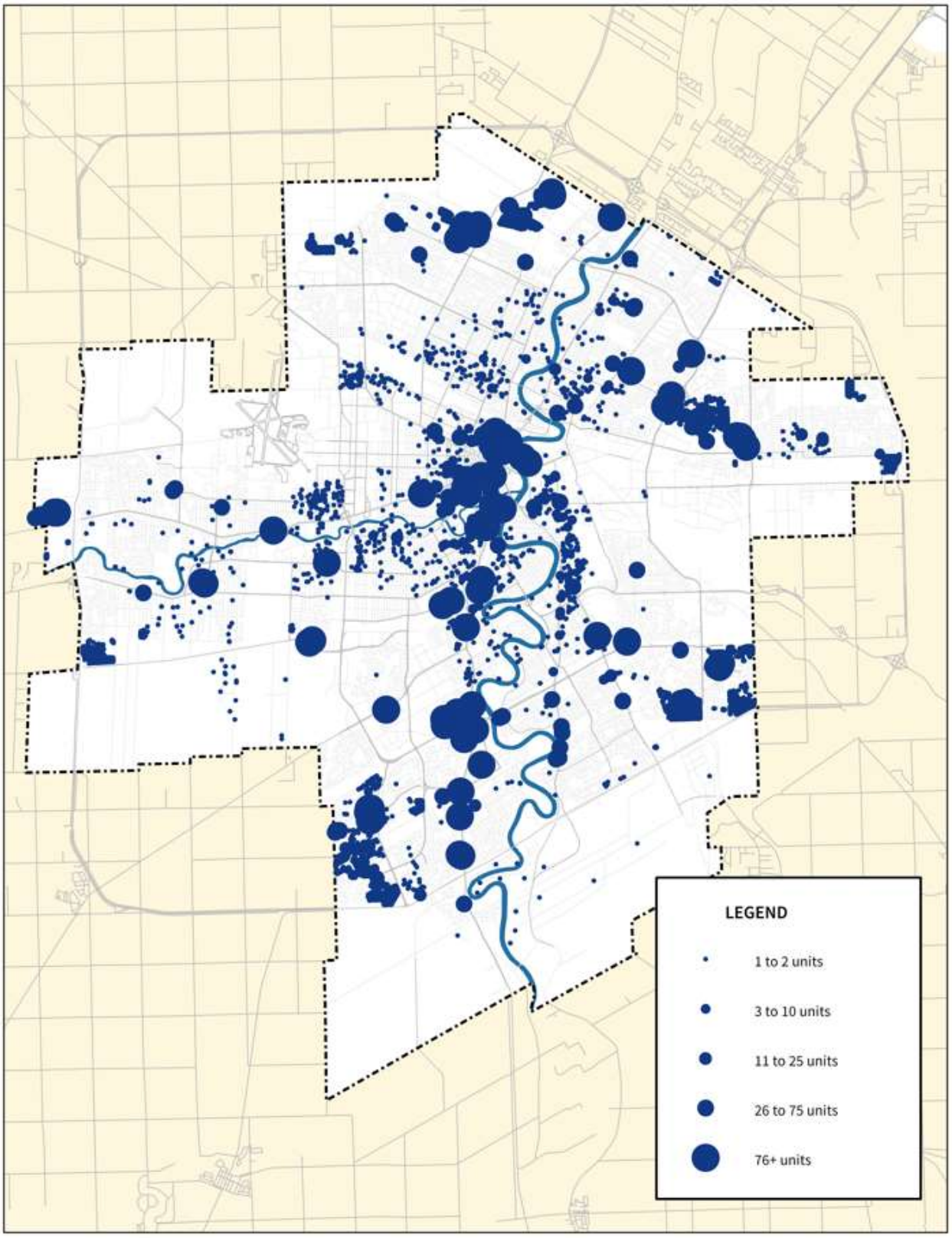

Figure 5-9: Permits issued for the construction of new residential dwelling units, 2019-23

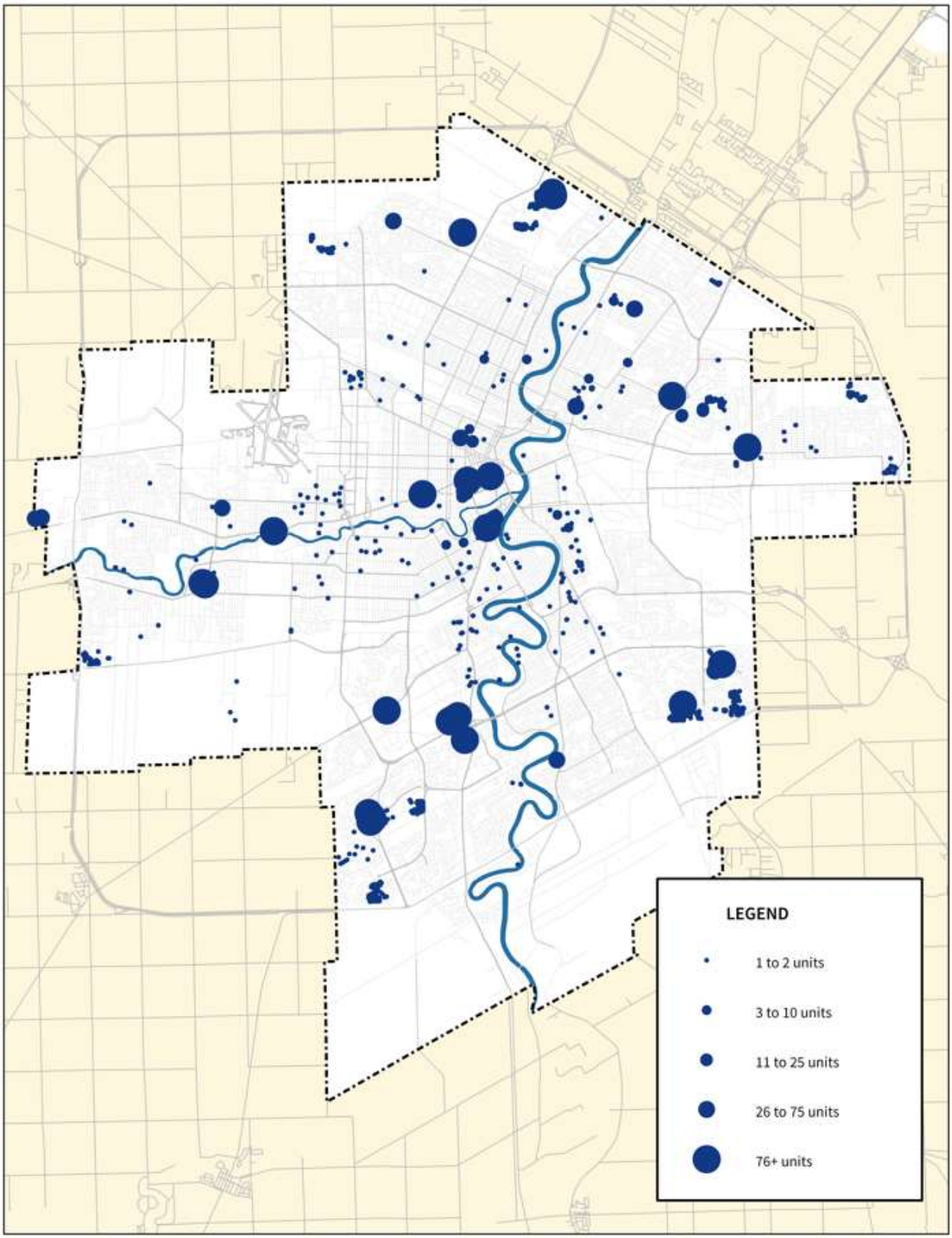

Figure 5-10: Permits issued for the construction of new residential dwelling units, 2023

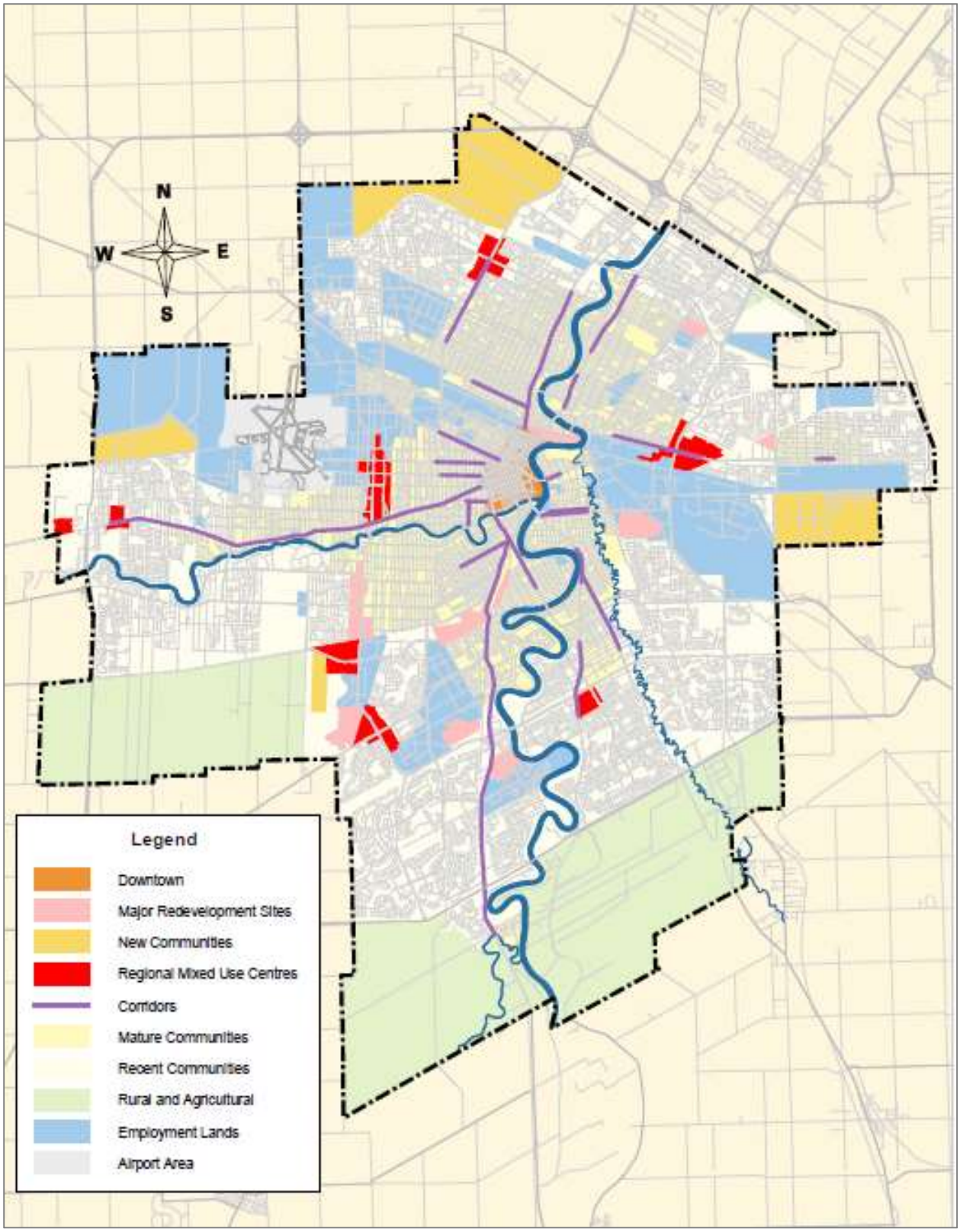

Figure 5-11: Complete Communities 2.0 Urban Structure

5.3 Development Activity by Dwelling Types

Residential development permits are classified into four dwelling types consistent with Statistics Canada definitions, as described herein. Ground-oriented housing include dwellings that have a separate exterior door that opens directly onto the street without passing through a common lobby or corridor.

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 5-12: Dwelling type definitions used in this report

The chart below indicates dwelling types by year since 2016. It illustrates a large increase in the share of apartment units, a moderate decline in the share of singles, and little variability in semis and rows. From 2019 to 2023, 25% (6,288) of all dwelling units were singles, while 4% were semis (1,124), 6% were rows (1,496), and 65% (16,657) were apartments.

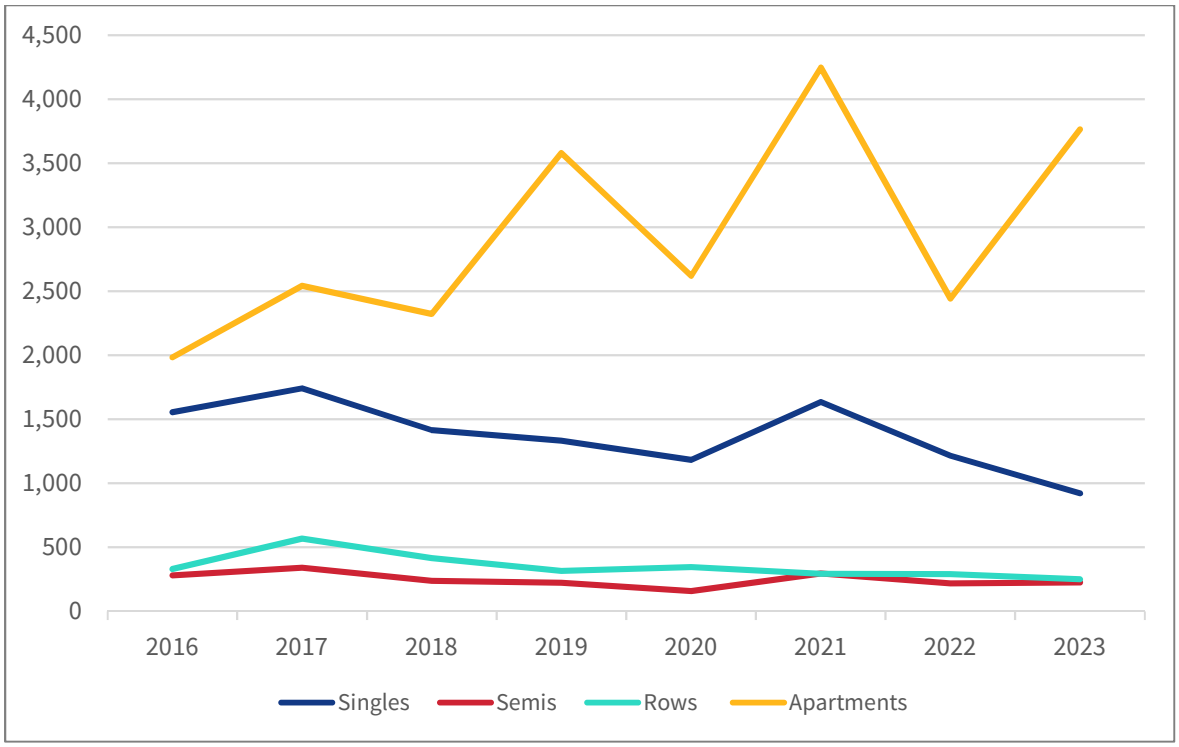

Figure 5-13: New residential units by dwelling type, by year

Year	Singles		Semis		Rows		Apartments	
	No.	%	No.	%	No.	%	No.	%
2016	1,555	37	282	7	332	8	1,984	48
2017	1,742	34	340	7	568	11	2,543	49
2018	1,415	32	239	5	416	9	2,322	53
2019	1,333	24	223	4	315	6	3,580	66
2020	1,183	27	159	4	347	8	2,621	61
2021	1,635	25	297	5	294	5	4,247	66
2022	1,215	29	219	5	290	7	2,444	59
2023	922	18	226	4	250	5	3,765	73
2019-23 total	6,288	25	1,124	4	1,496	6	16,657	65

Figure 5-14: Development activity by dwelling type, 2016-23

In considering a longer period of time, it becomes increasingly evident that the city's housing market experienced a meaningful change around 2018-19 characterized by an acceleration of multifamily development. This has helped buoy higher intensification rates.

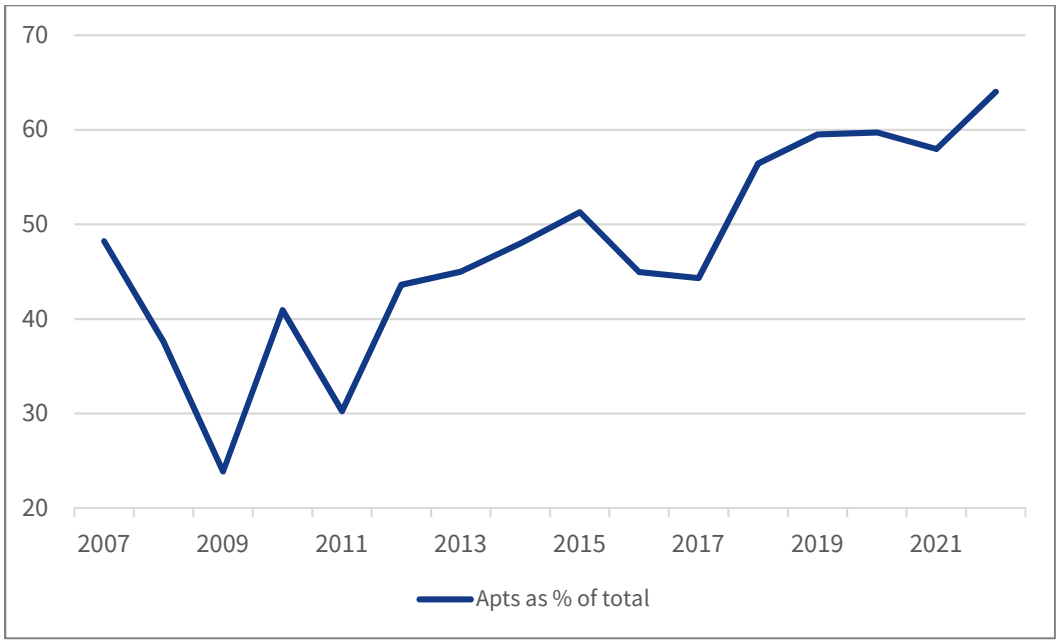

Figure 5-15: Apartments as percentage of annual total housing starts, 2007-2023 (source: CMHC Housing Market Information Portal)

This trend is continuing to accelerate. 2023 marked the first year since 2001 that housing starts for single-detached dwellings fell below 1,000. That year saw 906 single-detached starts, against 1,135 total starts. In contrast, 2023 saw 981 single-detached starts against 4,788 total starts.

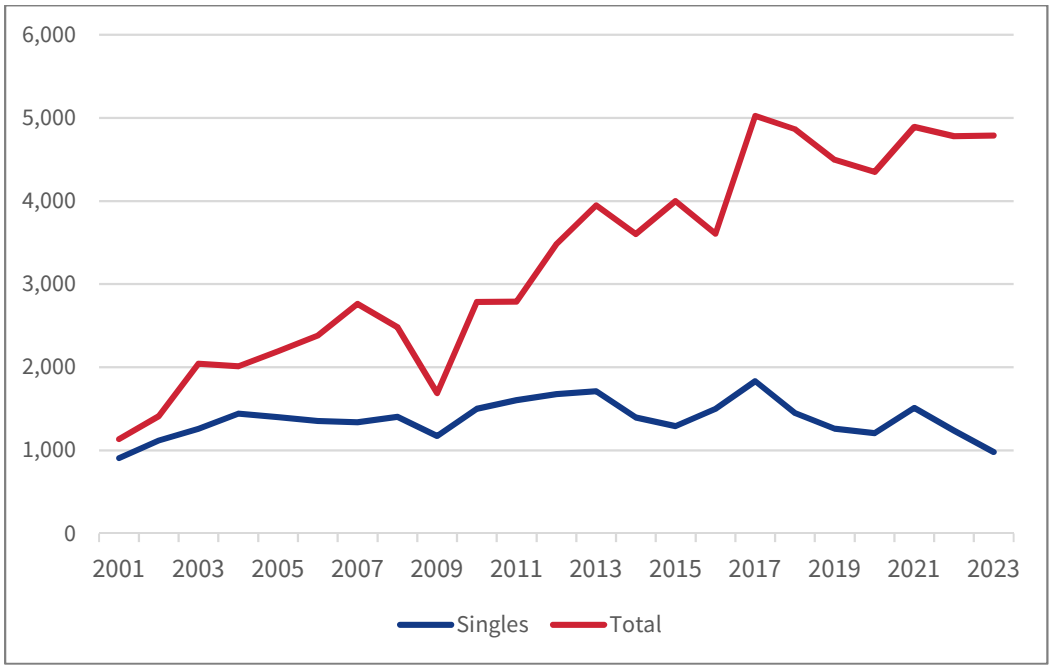

Figure 5-16: Housing starts, single-detached and total dwellings, 2001-2023 (source: CMHC Housing Market Information Portal)

The chart below indicates the share, in percentage, of all dwelling units located in intensification and greenfield areas. For example, in 2023, 29% of all new single family detached units were located in intensification areas, while 54% 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
2023	Intensification	29	3	46	63
	Greenfield	71	97	54	37
2019-23 total	Intensification	23	11	31	75
	Greenfield	77	89	69	25

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

Compared to recent history, 2023 saw an unusually high number of new greenfield apartment dwelling units at 1,409. This compares to an annual average of 831 over the last five years. 485 of these 2023 dwelling units were located in Waverley West (Bridgwater) Town Centre alone (see Figure 5-27 below for more information).

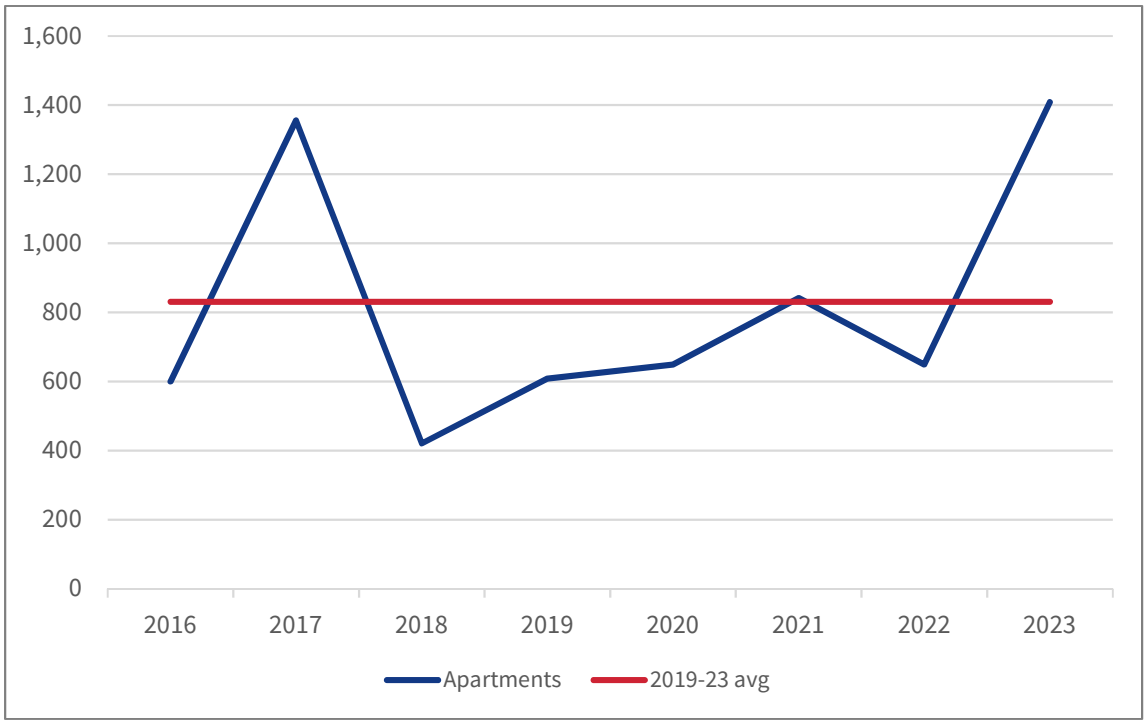

Figure 5-18: Greenfield apartment units compared to the average from the last five years

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, including in relation to the City's planned long-term Primary Transit Network.

	2017	2018	2019	2020	2021	2022	2023
400m of RT station	57	132	355	359	408	145	750
400m of Primary Transit Network	3,225	2,943	4,228	2,730	4,211	2,590	3,660

Figure 5-19: Permits issued for the construction of new residential dwelling units in proximity to TOD areas

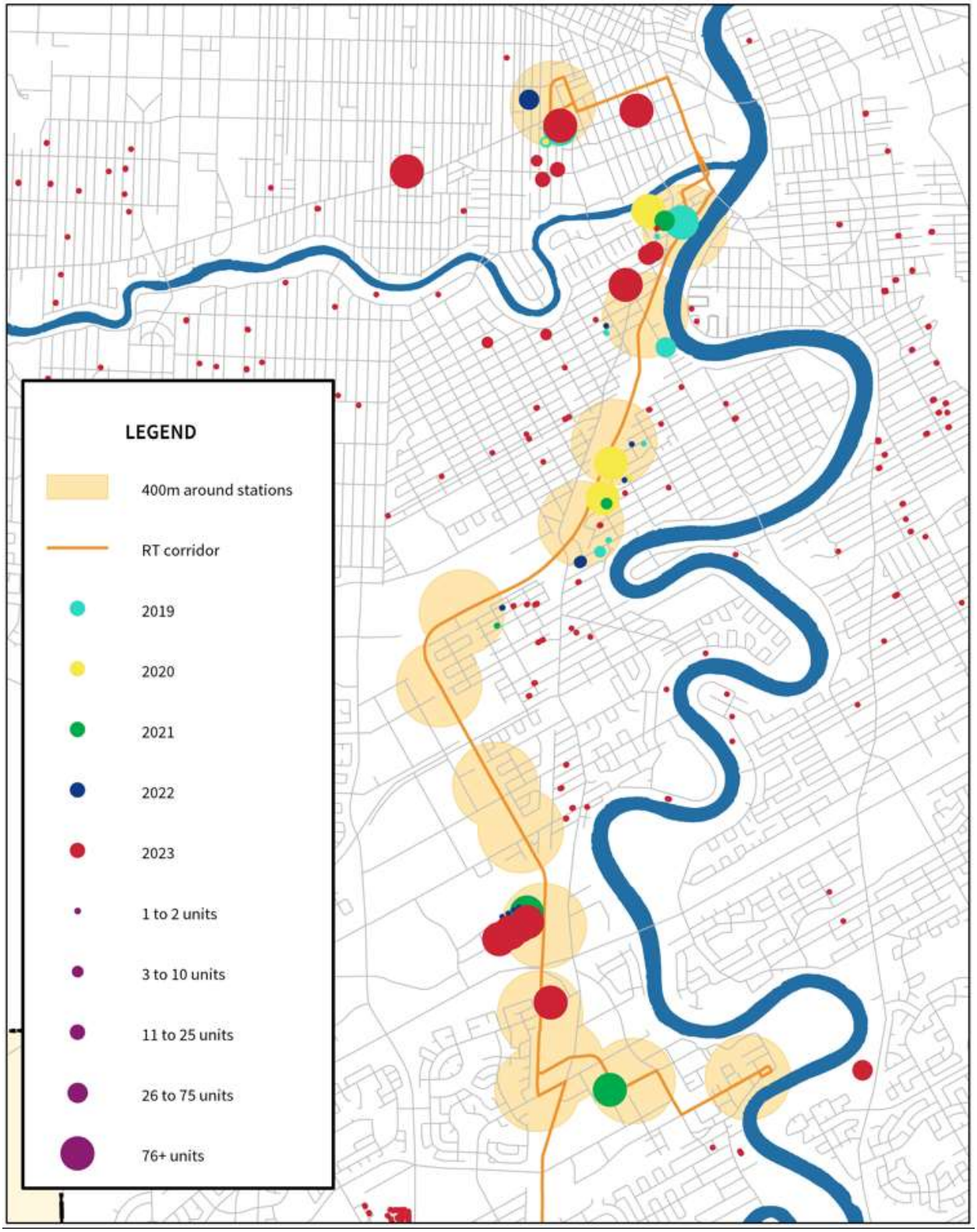

Figure 5-20: Permits issued for the construction of new residential dwelling units in proximity to rapid transit stations, 2019-23

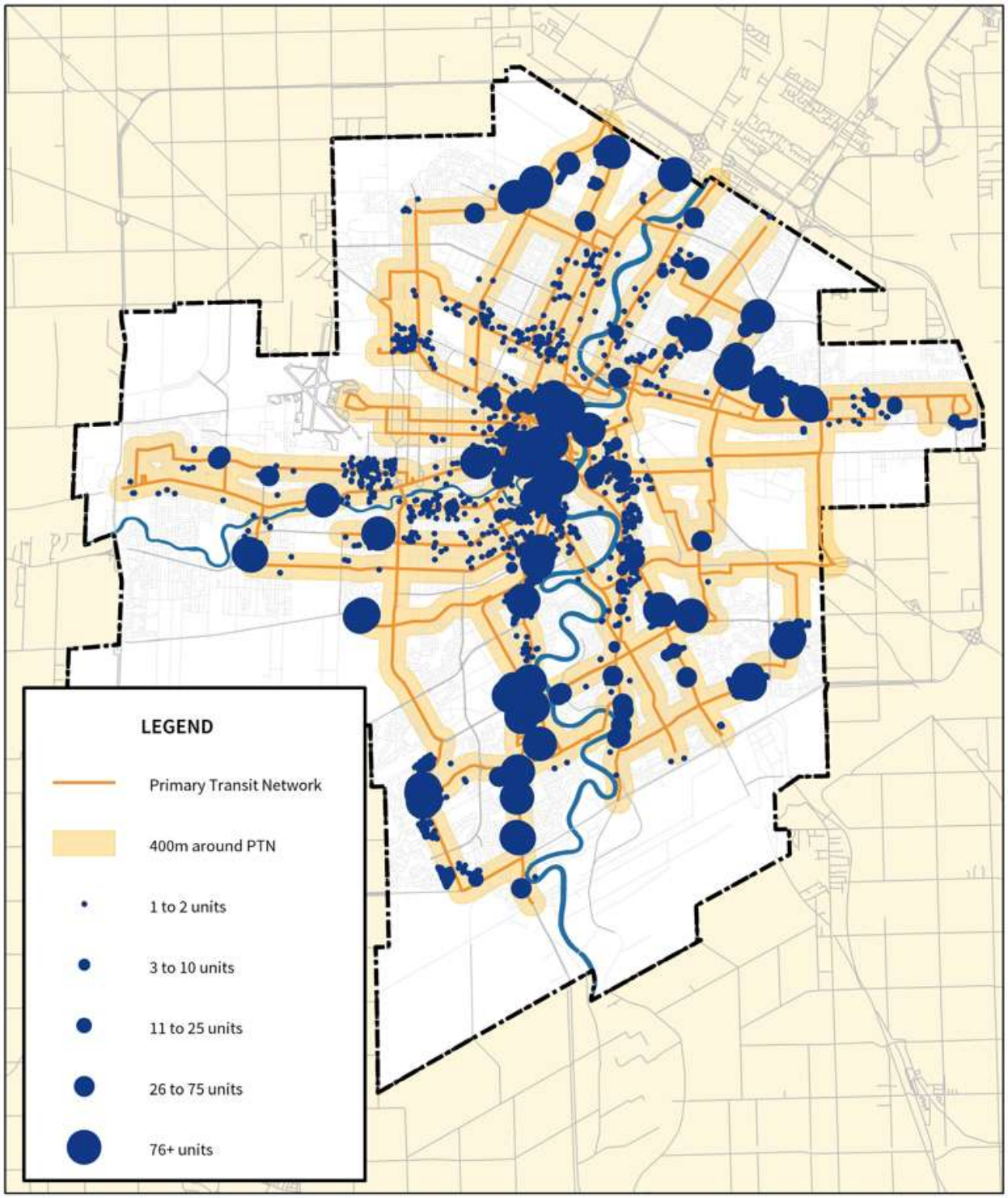

Figure 5-21: Permits issued for the construction of new residential dwelling units in proximity to the planned long-term Primary Transit Network, 2019-23

The next table describes the nature of this development by dwelling type, which indicates that development in proximity to higher order transit is predominantly apartment dwelling units.

	Singles	Semis	Rows	Apts
400m of RT station	< 1%	< 1%	3%	96%
400m of Primary Transit Network	14%	2%	5%	79%

Figure 5-22: Permits issued for the construction of new residential dwelling units, in TOD areas, 2019-23, 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 CCDS 2.0 having experienced the greatest amount of development activity from 2019 to 2023, as measured by permits issued for new residential units. In Mature Communities, the largest number of new residential dwelling units were built in the River-Osborne neighbourhood, with 494 total dwelling units.

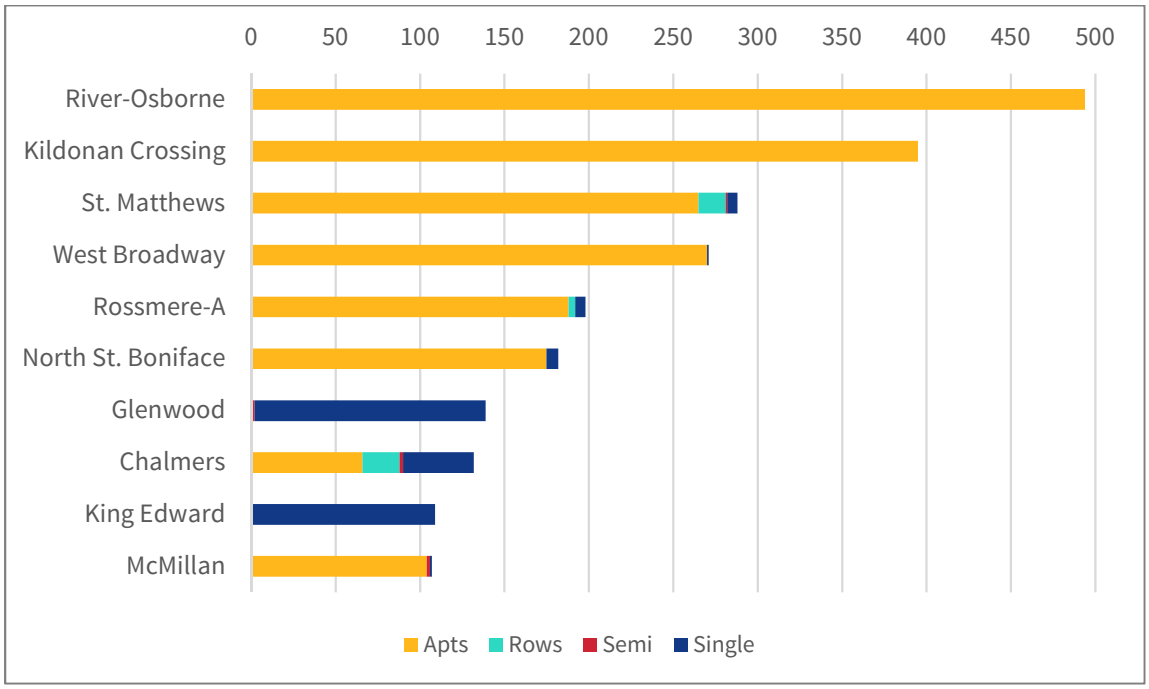

Figure 5-23: Top ten Mature Communities neighbourhoods by new dwelling units, 2019-23

Between 2019 and 2023, the highest rates of new infill single-detached development in Mature Communities occurred in the Glenwood neighbourhood, followed by King Edward, Brooklands, North River Heights, and Sir John Franklin.

Neighbourhood	New dwelling units
Glenwood	137
King Edward	108
Brooklands	72
North River Heights	43
Sir John Franklin	43
Chalmers	42
Beaumont	39
Lord Roberts	36
Burrows Central	35
Maybank	34

Figure 5-24: Top ten Mature Communities neighbourhoods by new single-detached units, 2019-23

In Recent Communities, Eaglemere accommodated the largest number of new dwelling units with 514, most of which were located on the east side of Molson St, north of Grassie Blvd. Eaglemere was followed by Marlton with 276, and Leila North with 264.

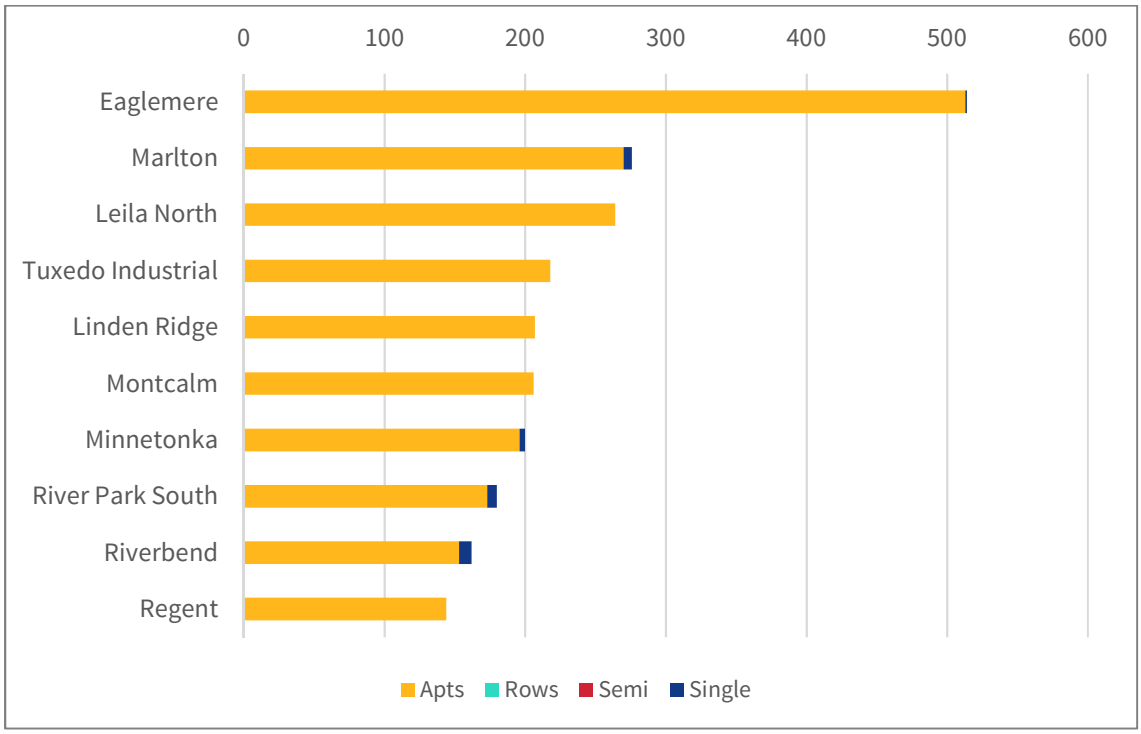

Figure 5-25: Top ten Recent Communities neighbourhoods by new dwelling units, 2019-23

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 6.5 of this report.

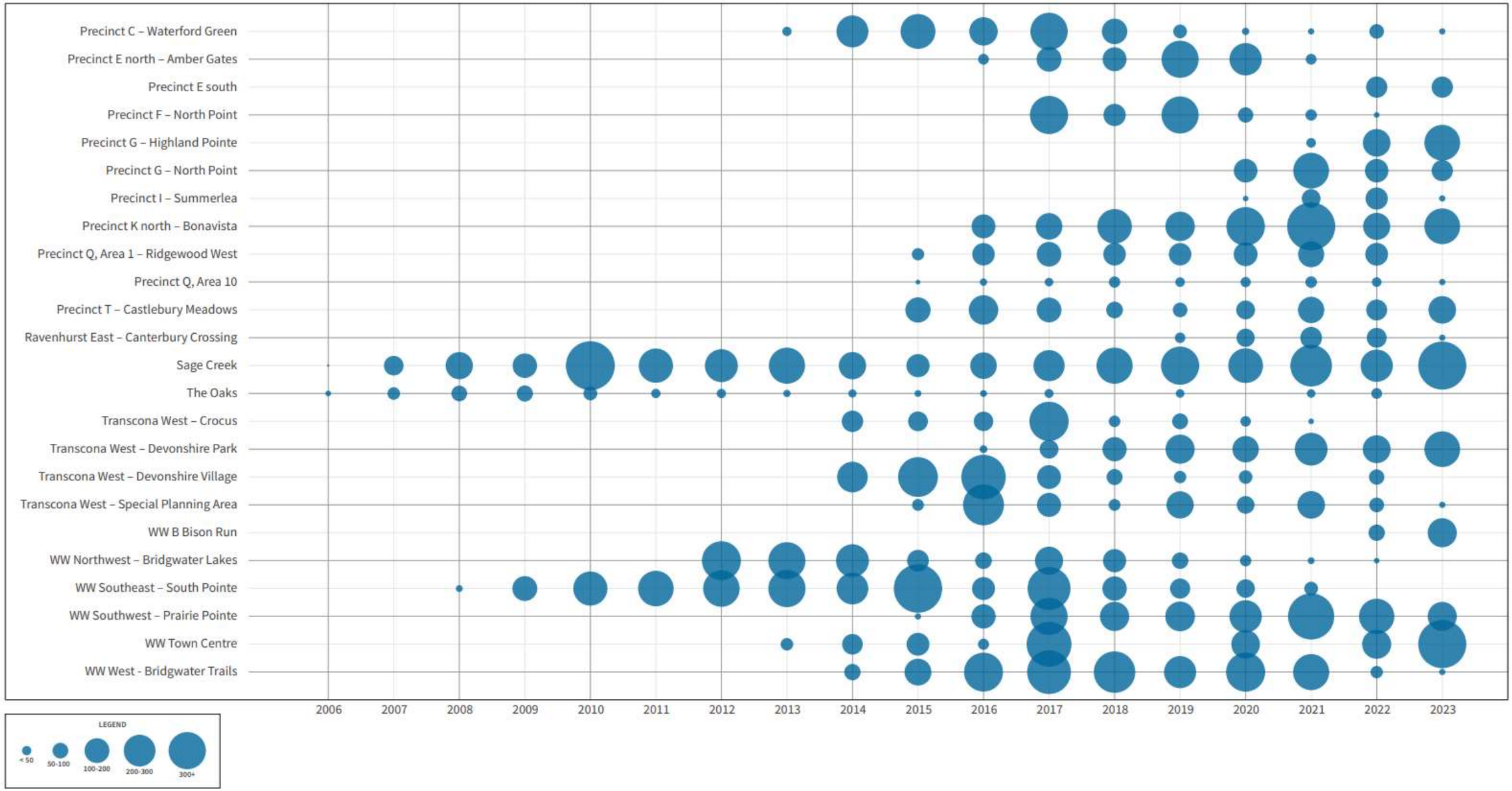

Figure 5-26: Magnitude of permits issued for new dwelling units by year, major greenfield sites

The chart below illustrates permits issued for the construction of new greenfield residential dwelling units, by dwelling type, in 2023. Section 6.5 provides additional detail on total and remaining capacity by site, including a map of these sites.

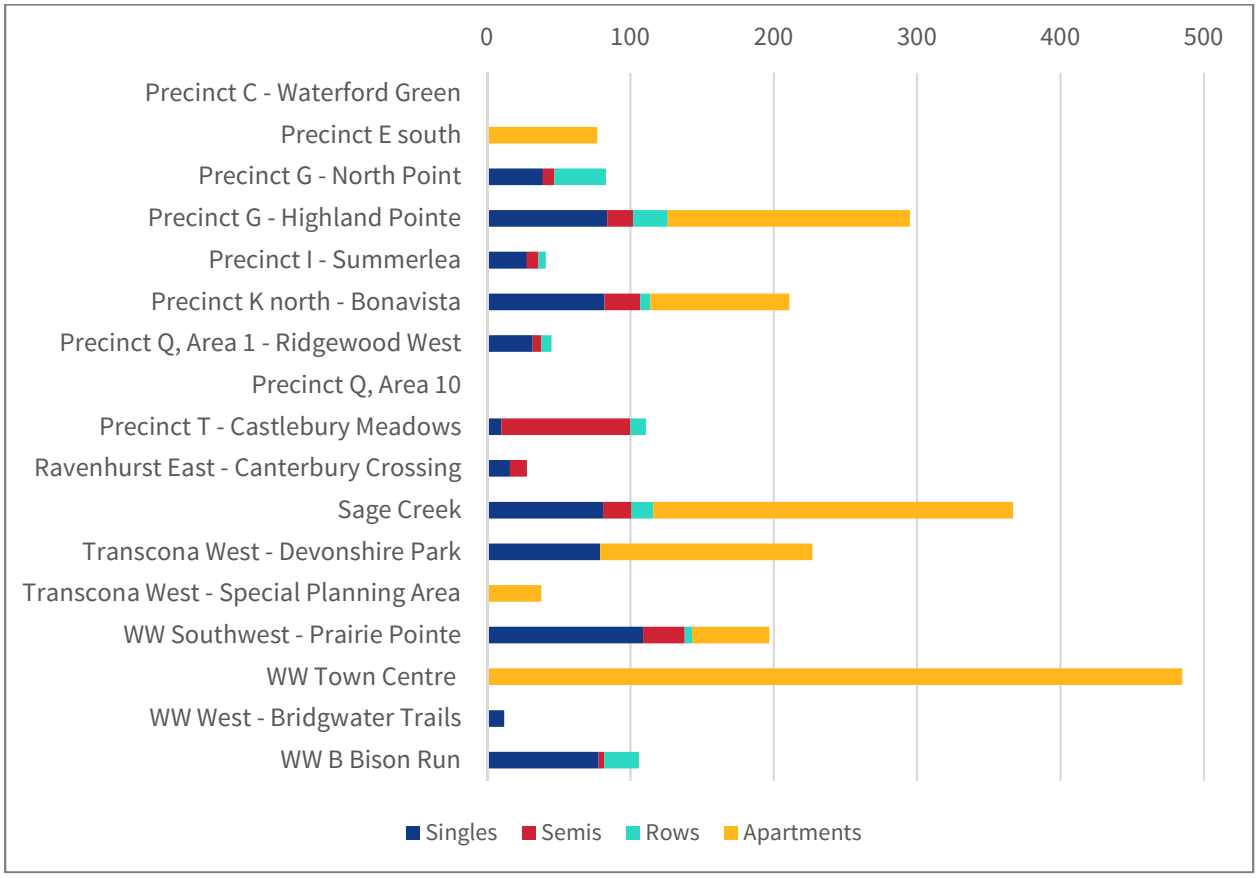

Figure 5-27: Greenfield dwelling units, 2023, by site and dwelling unit type

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 187 per year in 2022, with only a small decrease in 2023. More recently, on May 30, 2024, Council approved a set of zoning bylaw amendments that allowed for detached secondary suites as a permitted use in Established Neighbourhoods.

Year	No.
2012	7
2013	7
2014	11
2015	29
2016	55
2017	79
2018	91
2019	117
2020	90
2021	180
2022	187
2023	163
Total	666

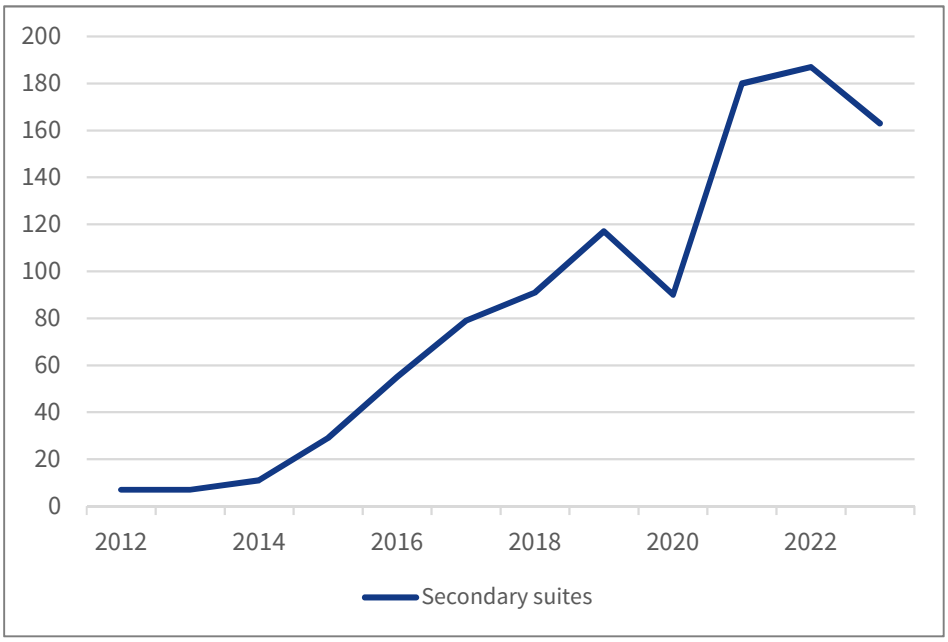

Figure 5-28: Permits issued for the construction of secondary suites, 2012 to 2023

New secondary suites are predominantly being built in existing neighbourhoods, particularly in Mature Communities. From 2012 to 2023, 96% were built in Established Neighbourhoods, including 86% in Mature Communities. Only a small amount of new secondary suites were built in greenfield areas (Emerging and New Communities).

Urban Structure designation	2012-2023	
	No.	%
Corridor frontage	1	< 1
Urban Corridors	0	0
Regional Corridors	1	< 1
Established Neighbourhoods	953	96
Mature Communities	854	86
Recent Communities	99	10
Greenfield areas	27	3
Emerging Communities	27	3
New Communities	0	0
Downtown	0	0
Major Redevelopment Sites	6	1
Rural Agricultural	4	< 1
Total	828	

Figure 5-29: Permits issued for the construction of secondary suites, 2012 to 2023, by Complete Communities

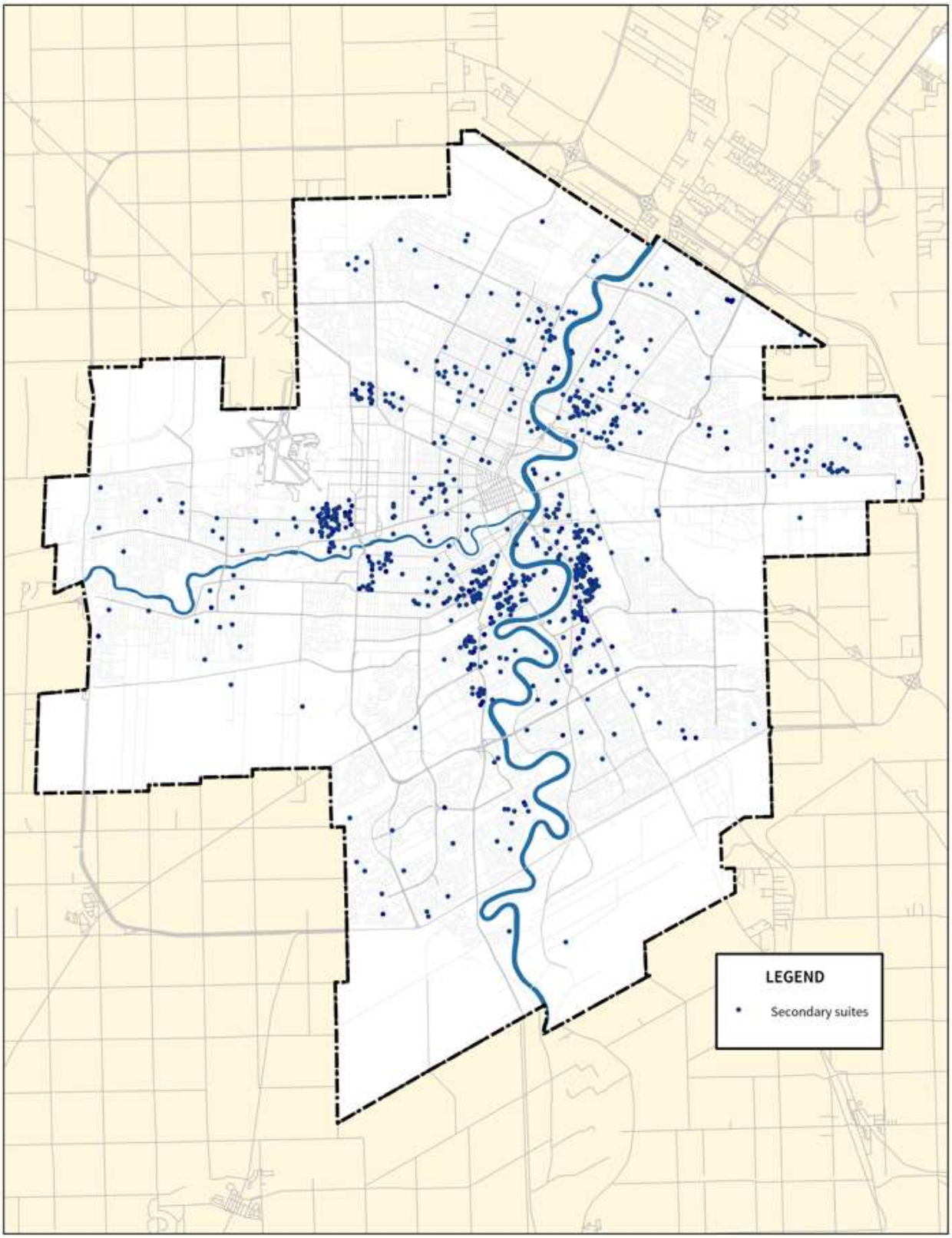

Figure 5-30: Permits issued for the construction of new secondary suites, 2012 to 2023

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*. Over the last five years, the City saw an annual average of 123 dwelling units lost in Infill Area 1, 148 units lost in Infill Area 2, and 31 units lost in Recent Communities. These Infill Area figures increased around 2018 in concert with higher rates of multifamily development and intensification.

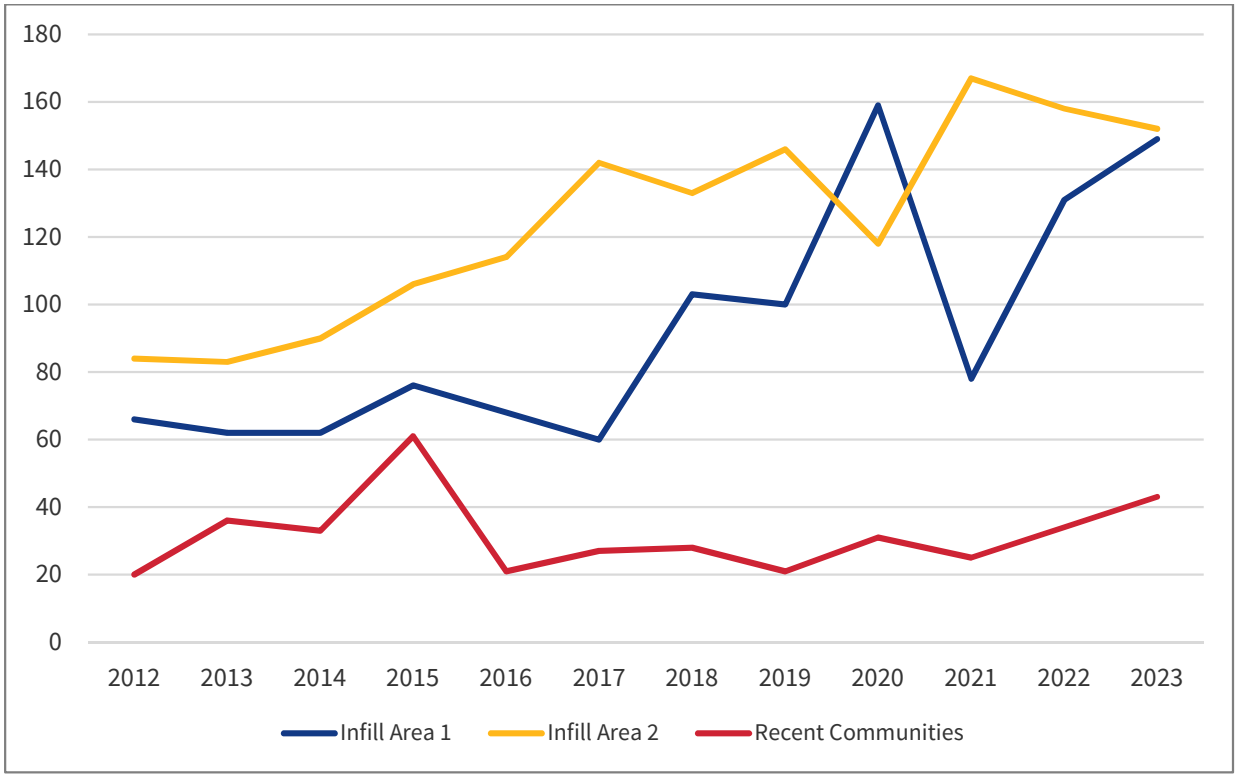

Figure 5-31: Average annual dwelling units lost, by area

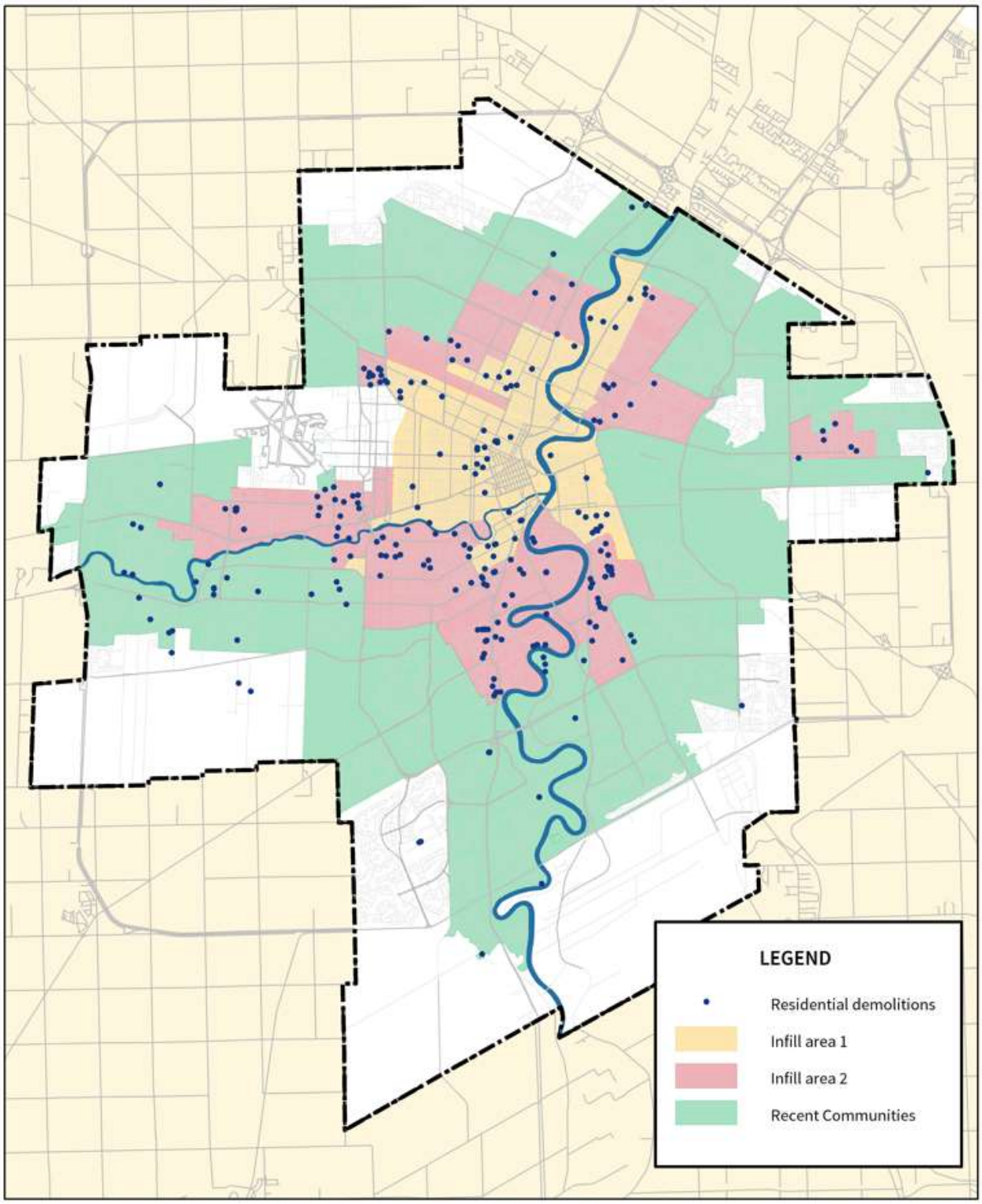

Figure 5-32: Map of residential demolitions, 2023

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 5-33 below

describes, over the last five years Infill Area 1 sees an average of eight new units created for every unit lost, Infill Area 2 sees an average of four new units created for every unit lost, and Recent Communities sees 53 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 the generally higher densities of replacement developments. Recent Communities have a much higher number because demolitions are far less frequent – instead, 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
2022	568	131	4.3	338	158	2.1	1,425	34	41.9
2023	846	149	5.7	447	152	2.9	1,430	43	33.3
5-yr avg.		**123**	**8.0**		**148**	**3.8**		**31**	**52.6**

Figure 5-33: Dwelling units created vs dwelling units lost, 2012 to 2023

6.0 Greenfield Residential Land Supply

6.1 Selecting a Demand Scenario

In August 2024, the City of Winnipeg's Office of Economic Research released the *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area, 2024 Update*. These projections were based on three population growth scenarios ranging from low, to baseline, to high, which were based on varying population growth components described below. The Low projection expects the City to reach a population of 914,000 people by 2048, the Baseline projection 1,017,200 people, and the High projection 1,105,100 people.

These population forecasts are comprised of a few components: Natural increase, which considers how the City's population is growing by births relative to deaths; international migration, which considers newcomer arrivals from outside of Canada as either permanent or non-permanent residents; and interprovincial and intraprovincial migration, which consider newcomer arrivals to Winnipeg from other provinces and from within Manitoba respectively. In each scenario, it is anticipated that the main source of population growth will be international migration, as the natural increase in population will decline in the coming years due to low fertility and an aging population. Different scenarios consider higher or lower rates of each of these components.

More recent Government of Canada announcements proposing a short-term curtailing of international immigration from 2025 to 2027 will factor into next year's forecast.

These population projection scenarios were used to forecast housing starts based on demographic changes, historical housing starts by type, and current interest rates. As Figure 6-1 indicates below, all three scenarios expect lower levels of housing starts compared to a fourth scenario based on average rates of development activity over the last five years. All scenarios reflect the City's minimum housing supply growth target required by its Housing Accelerator Fund agreement with the Government of Canada, which requires the City to permit an additional 5,277 housing units between 2024 and 2026 beyond what would otherwise be projected.

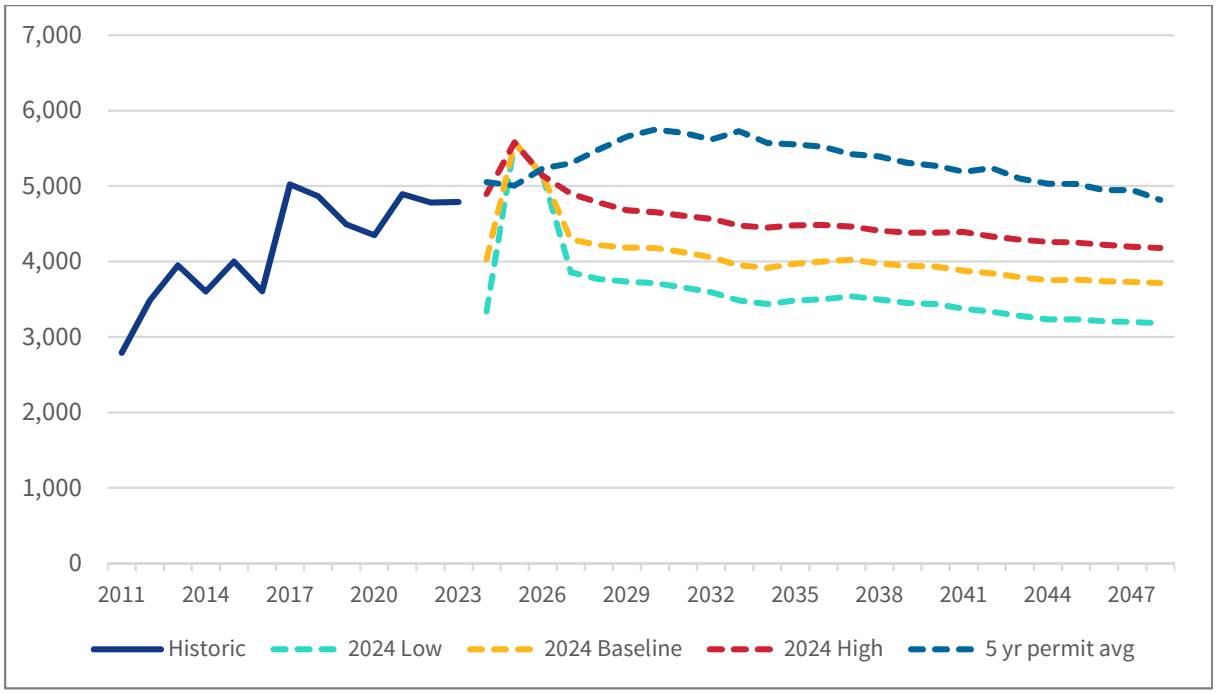

Figure 6-1: Forecasted housing starts compared to a scenario based on development activity over the last five years

Decreases in housing starts would effectively result in gains to the City's greenfield land supply, as its existing supply would be absorbed over a long period of time. This is particularly applicable to singles, which are significant drivers of greenfield development. While annual singles have declined over the last decade, this decline is forecasted to level off going forward.

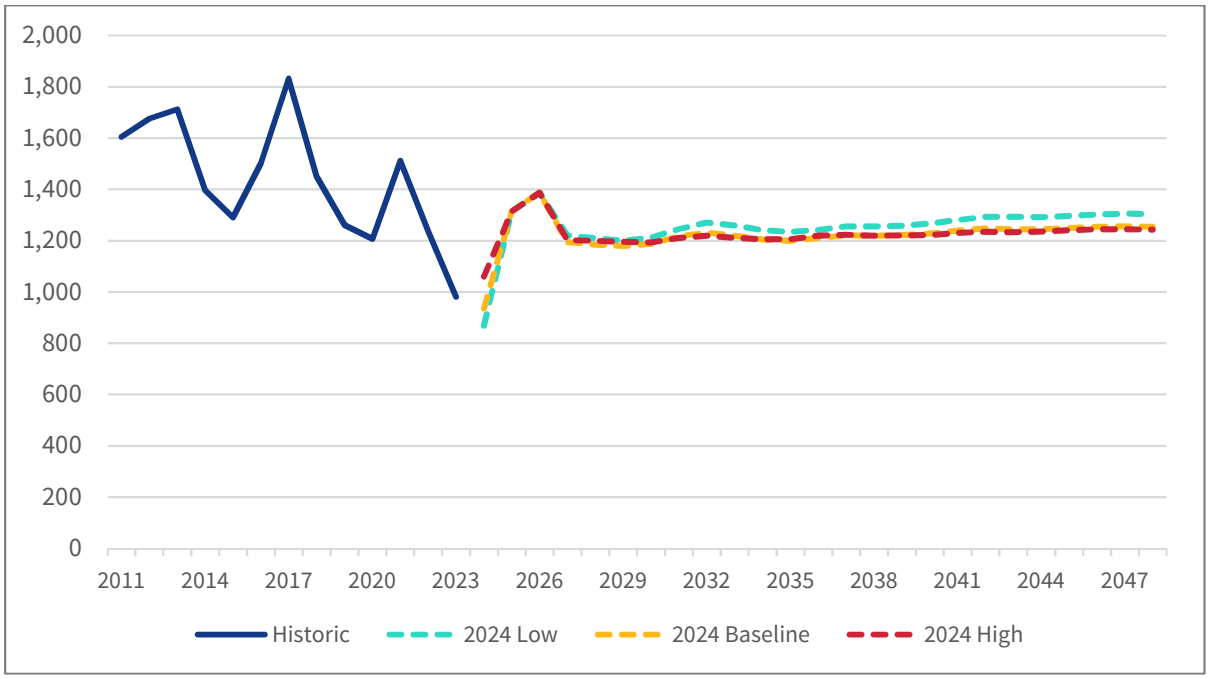

Figure 6-2: Forecasted singles, 2024 to 2048

Beyond what was described above, a broader range of projections were considered to contemplate the implications of a broader range of outcomes. In addition to the 2024 City and five-year permit forecasts, additional permit-based scenarios were developed at 50% and 40% intensification rates, as well as mid-range scenarios splitting the difference between City and permit forecasts.

Scenarios	Annual avg. GF demand (units)	Years supply		
		Serviced	Inf. Installed & B/L approved	Planned
CCDS 2.0 supply targets	**n/a**	**5-7**	**3-5**	**10**
2024 CoW forecasts				
2023 Low	1,751	11.5	7.5	16
2023 Baseline	1,891	11	7	15
2023 High	2,048	10	6.5	13.5
2019-23 permit scenarios				
Five-year permit	2,300	9	5.5	12
5-yr at 50% infill	2,471	8.5	5	11.5
5-yr at 40% infill	2,949	7	4.5	9.5
Mid-range scenarios				
2023 Low (mid-range)	1,872	11	7	15
2023 Baseline (mid-range)	1,931	10.5	6.5	14.5
2023 High (mid-range)	1,999	10	6.5	14
2023 High (MR) at 50% infill	2,455	8.5	5	11.5
2023 High (MR) at 40% infill	2,942	7	4.5	9.5

Figure 6-3: Range of contemplated greenfield demand scenarios

Figure 6-4 shows how the number of forecasted annual greenfield units per scenario compares to historical figures over the last decade.

2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2019-23 avg
1,893	2,121	1,891	1,735	2,018	2,207	3,482	1,840	1,994	2,017	2,606	1,989	2,415	2,204

Figure 6-4: Greenfield dwelling units, 2011-2023

For reporting purposes, there is a need to focus on a more limited number of scenarios. The selection of a greenfield demand scenario has significant implications on the timing of

secondary plans and infrastructure. In selecting a primary demand scenario, the following should be considered:

- The City's 2024 forecasts are based on demographic and macroeconomic analysis, while permit scenarios simply project existing short-term trends;
- Increasing interest rates create uncertain market conditions;
- Overestimating greenfield land supply results in infrastructure investments being made earlier than necessary, while underestimating land supply reduces the margin for error with respect to timely infrastructure delivery; and
- The City's forecasts are intended to be reviewed annually.

At this time, it is recommended that the "Five-year permit" scenario is used as the Primary demand scenario for planning purposes. Compared to the 2024 City forecasts, it is felt that it is better to (reasonably) err on the side of overestimating demand, as doing so provides a greater buffer for infrastructure planning purposes and the accommodation of growth.

Beyond this scenario, the "5-yr at 50% infill" (heretofore 'High' in Section 6.2 below) and "2023 High" ('Low') scenarios should be considered as the high and low ends of a range of reasonable outcomes. Additional scenarios can help communicate the impacts of more drastic demographic and/or market changes.

6.2 Supply by Targets

The General Growth section of *Complete Communities 2.0* (CCDS) 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 6-5 below and are accurate as of January 1, 2024.

[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.

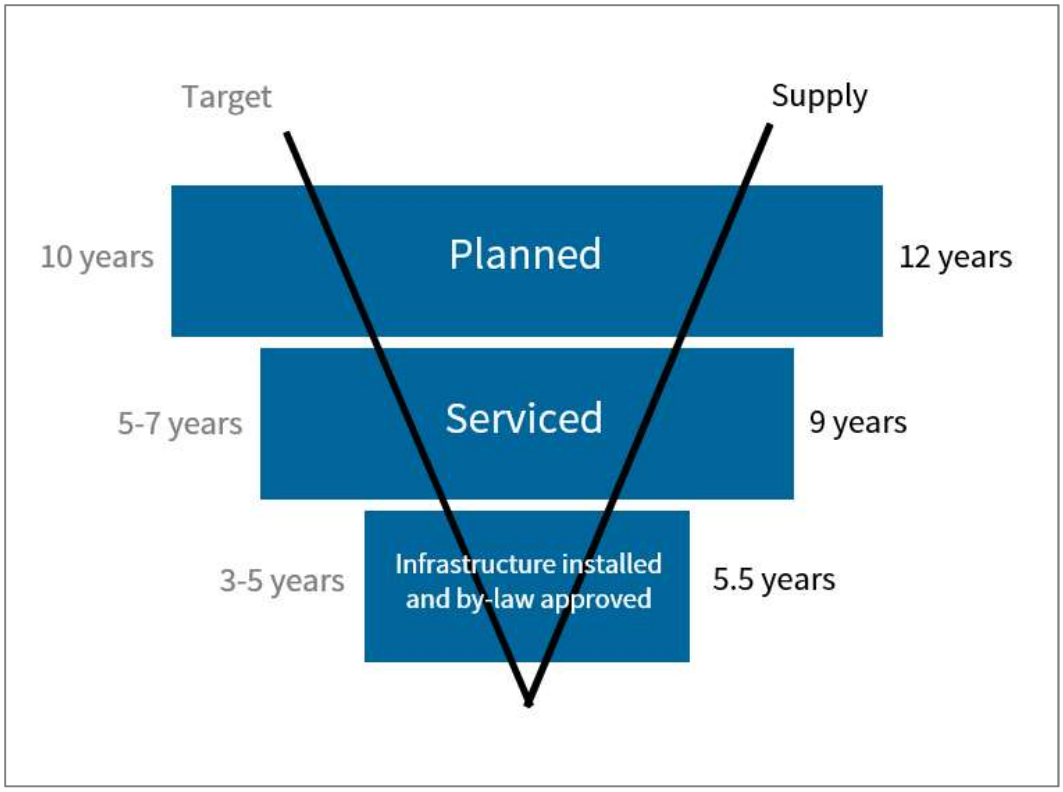

Figure 6-5: City of Winnipeg vacant residential greenfield land supplies in relation to Complete Communities 2.0 targets, as of January 1, 2024

These figures represent a slight decline from those in last year's report, which forecasted 13.5 years of planned supply, 10 years of serviced supply, and 6.5 years of supply where all growth-enabling infrastructure is installed and subdivision bylaws are approved. However, the City of Winnipeg should still be considered to have a healthy supply of vacant greenfield land, with its supplies[1] exceeding all Complete Communities' targets. These land supplies and targets should serve as the basis for the timing of future precinct planning processes and growth-enabling infrastructure, which will be needed over time to maintain this healthy supply.

Years supply is determined by dividing total land supply by forecasted annual greenfield land demand. As described in Section 6.1, the estimated supplies assume the continuation of existing development trends over the last five years, notably the distribution of dwelling types

[1] "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. "infrastructure installed and by-law approved" refers to the fact that following Council approval of a plan of subdivision, 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.

to greenfield and infill areas. Greenfield land supply estimates include both Standard and Alternative Higher[1] scenarios.

Section	Target	Supplies at varying levels of greenfield demand, Standard supply scenario		
		High demand	Primary demand	Low demand
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 ("Planned")	11.5 years	12 years	13.5 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land ("Serviced")	8.5 years	9 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	5.5 years	6.5 years

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

Section	Target	Supplies at varying levels of greenfield demand, Alternative Higher supply scenario		
		High demand	Primary demand	Low demand
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 ("Planned")	13 years	14 years	15.5 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land ("Serviced")	9.5 years	10.5 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	6.5 years	7.5 years

Figure 6-7: 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 A.1 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.

Compared to last year, there is little change in the City's supply of vacant serviced greenfield land. Losses through a year of absorption were partly offset by gains in supply. These notable gains in supply include:

- Approximately 200 additional units were gained in Transcona West – Special Planning Area based on Council approval of DASZ 54/2022, as well as building permits being issued at higher densities than what was originally forecasted.
- Approximately 600 additional units were gained in Precinct E South based on Council approval of DASZs 40/2022, 55/2022, 3/2023, and 4/2023.
- These gains in supply had the effect of increasing the average greenfield density used to forecast sites without approved plans of subdivision or secondary plans from 14.5 to 15.1 units per net acre (from 35.8 to 37.3 units per net hectare), resulting in further supply gains.

Looking ahead, the Public Service is currently engaged in a collaborative precinct planning process in landowners in South Transcona. Once a plan is approved by Council, this will result in gains in Planned supply.

6.3 Supply by Greenfield Phasing

The General Growth section of CCDS 2.0 prescribes policies to guide the sequencing of timely capital infrastructure and local area plans[1] 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] "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.

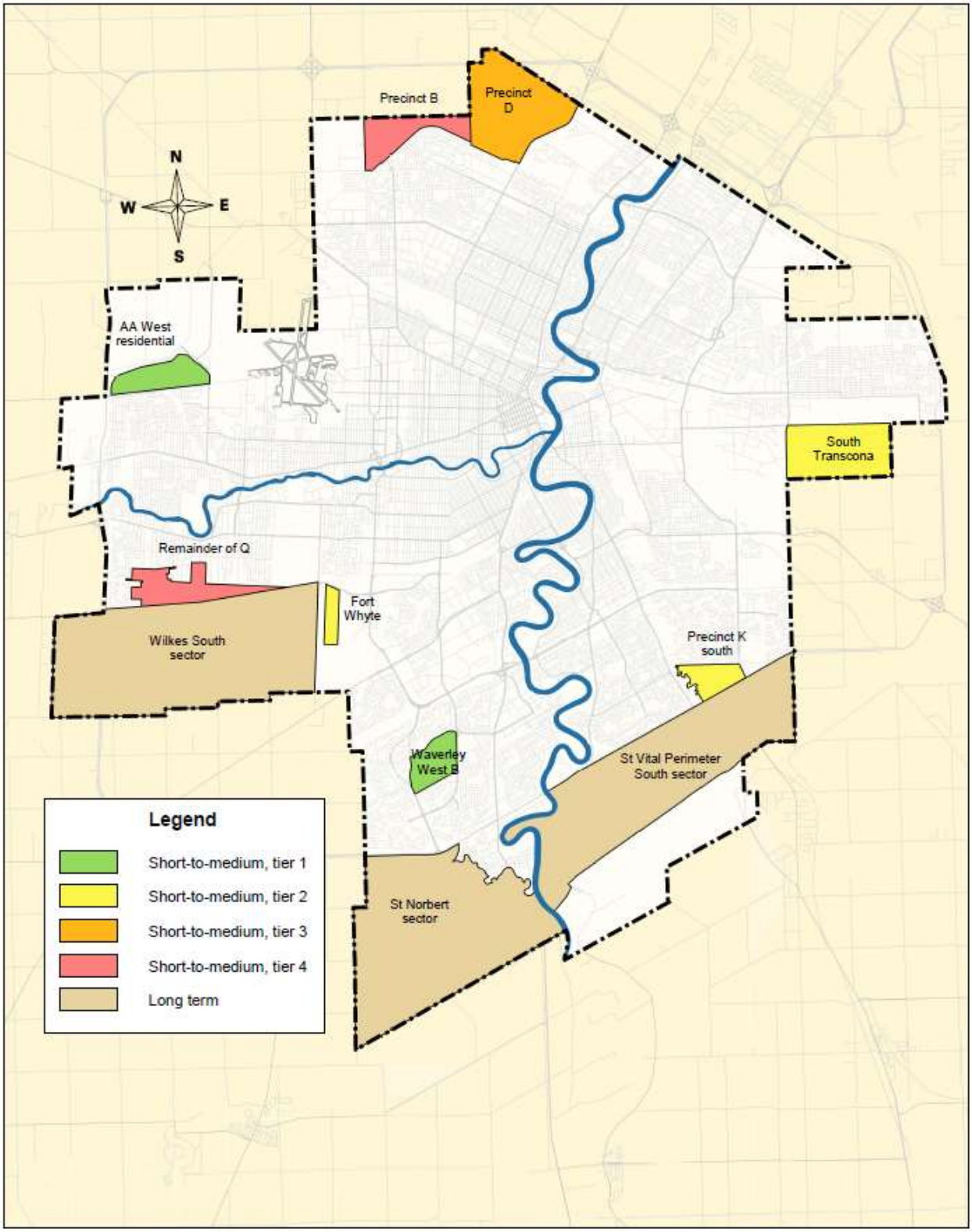

Figure 6-8: Map of greenfield phasing, Complete Communities 2.0

Figures 6-9 and 6-10 below quantify the City's greenfield land supplies with CCDS 2.0's phasing policies, while 6-11 notes the estimated year in which each phasing tier would be needed to accommodate growth (preferred scenarios highlighted in orange). An additional minimum land supply buffer should be provided for a minimum of three years in advance of these dates as per Policy B1.4.4.1 in CCDS 2.0.

These figures were determined by dividing the estimated supply by the forecasted annual average demand. In does so by treating all dwelling types equally. Consideration of the supply and demand of dwelling units by type could accelerate these timelines.

Tiers	Years supply		
	High demand	Primary demand	Low demand
Existing planned and serviced	8.5 years	9 years	10 years
Short-to-medium term lands[1]	11.5 years	12.5 years	14 years
Long term lands	27.5 years	30 years	33.5 years
Total potential land supply	47.5 years	51 years	57.5 years

Figure 6-9: Years supply by Complete Communities 2.0 greenfield phasing, Standard supply scenario

Tiers	Years supply		
	High demand	Primary demand	Low demand
Existing planned and serviced	10 years	10.5 years	11.5 years
Short-to-medium term lands	13.5 years	14.5 years	16 years
Long term lands	32 years	34.5 years	38.5 years
Total potential land supply	55 years	59 years	66.5 years

Figure 6-10: Years supply by Complete Communities 2.0 greenfield phasing, Alternative Higher supply scenario

Tiers	High demand		Primary demand		Low demand	
	Forecast	Alt. higher	Forecast	Alt. higher	Forecast	Alt. higher
Short-to-medium, tier 1	2032	2034	2033	2034	2034	2036
Short-to-medium, tier 2	2034	2035	2034	2036	2036	2037
Short-to-medium, tier 3	2037	2039	2038	2040	2039	2042
Short-to-medium, tier 4	2041	2044	2043	2046	2045	2048
Long term	2044	2047	2045	2049	2048	2052
Delivery of growth-enabling infrastructure should be planned for a minimum of three years in advance of these dates in accordance with Policy B1.4.4.1 of CCDS 2.0						

Figure 6-11: Years each phasing tier will be needed to maintain greenfield residential land supply

[1] Considers only the short-to-medium term lands that are not otherwise considered to be planned and serviced.

6.4 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 6.5 below.

Category	Supply scenario	Singles	Semis	Rows	Total G.O.[2]	Apts	Total
Planned and serviced	Standard	6,590	2,190	3,740	12,520	7,940	20,410
	Alt. Higher	5,640	3,400	4,700	13,740	10,070	23,810
Planned, but unserviced	Standard	3,600	810	1,340	5,750	1,730	7,480
	Alt. Higher	3,130	1,390	1,800	6,320	2,130	8,440
Unplanned	Standard	38,370	8,160	12,070	58,590	31,270	89,860
	Alt. Higher	32,620	15,230	17,190	65,040	38,460	103,500

Figure 6-12: Total greenfield residential supply, by dwelling type

6.5 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 6-13 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.

[1] Figures rounded.

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

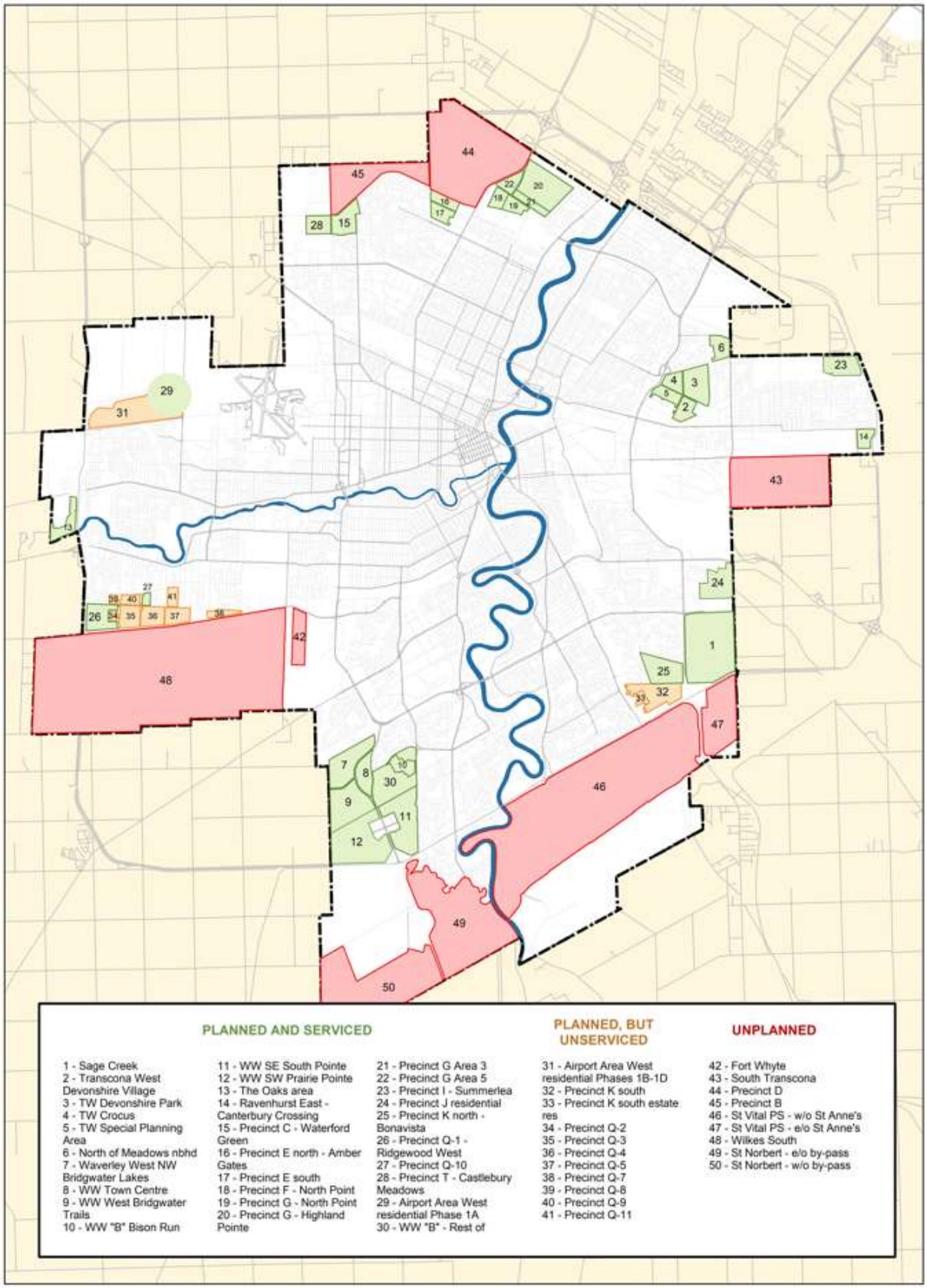

Figure 6-13: Greenfield supply, by site

The first chart notes those that are considered to be planned and serviced and includes units[1] 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	2,170	40	280	1,160	3,660
Transcona West – Devonshire Village	320	60	200	510	1,100
Transcona West – Devonshire Park	690	80	90	150	1,020
Transcona West – Crocus	250	90	0	230	580
Transcona West – Special Planning Area	110	150	80	530	860
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	1,010	1,390
WW West – Bridgwater Trails	1,030	260	60	590	1,950
WW B – Bison Run	120	0	20	0	150
WW B – Rest of	0	0	0	0	0
WW Southeast – South Pointe	1,390	0	600	480	2,460
WW Southwest – Prairie Pointe	1,030	200	130	390	1,750
The Oaks area	210	0	0	0	210
Ravenhurst East – Canterbury Crossing	210	40	0	0	240
Precinct C – Waterford Green	610	150	90	190	1,030
Precinct E north – Amber Gates	310	40	0	360	700
Precinct E south	0	0	0	150	150
Precinct F – North Point	170	110	60	350	690
Precinct G – North Point	180	80	90	170	520
Precinct G – Highland Pointe	210	40	20	170	450
Precinct G – Area 3	0	0	0	0	0
Precinct G – Area 5 (triangle)	0	0	0	0	0
Precinct I – Summerlea	170	10	10	0	190
Precinct J residential	0	0	0	0	0
Precinct K north – Bonavista	960	90	80	570	1,710
Precinct Q, Area 1 – Ridgewood West	690	10	50	0	750
Precinct Q, Area 10	90	0	0	0	90
Precinct T – Castlebury Meadows	310	400	100	40	840
Planned and serviced total	12,110	1,570	2,110	7,020	22,810

Figure 6-14: Units built to-date in the City's greenfield residential land inventory

[1] Unit totals for following charts are estimates. Totals may not equal sum of component figures due to rounding.

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	2,720	100	880	1,360	5,050	67	86	72	550	60	600	1,200	190	1,400
TW – Devonshire Vlg	240	70	260	480	1,040	100	100	100	0	10	50	60	0	50
TW – Devonshire Prk	1,070	90	290	130	1,570	61	100	65	370	0	200	570	0	570
TW – Crocus	260	140	0	230	630	87	100	92	10	50	0	50	0	50
TW – SPA	130	160	110	1,070	1,470	83	49	58	30	20	30	70	540	610
North of Meadows nbhd	320	70	100	260	740	0	0	0	320	70	100	490	260	740
WW NW – Bridgwater Lakes	1,190	0	0	0	1,190	100	n/a	100	0	0	0	0	0	0
WW Town Centre	0	130	250	1,190	1,570	100	85	89	0	10	0	10	180	190
WW W – Bridgwater Trls	1,040	270	0	1,180	2,490	100	50	78	10	10	0	20	590	600
WW B – Bison Run	310	40	260	880	1,490	24	0	10	190	40	240	460	880	1,340
WW B – Rest of	690	140	270	730	1,590	0	0	0	690	140	270	1,110	730	1,840
WW SE – South Pt	1,410	0	570	410	2,390	100	100	100	20	0	0	20	0	20
WW SW – Prairie Pointe	2,270	930	380	630	4,210	38	61	42	1,240	730	250	2,220	250	2,460
The Oaks area	210	110	0	0	320	66	n/a	66	0	110	0	110	0	110
Ravenhurst East – Cntrbry Cross.	290	70	0	110	470	68	0	52	80	40	0	120	110	220
AA West– Ph 1A	390	80	120	320	910	0	0	0	390	80	120	590	320	910
Pr. C – Waterford Grn.	580	200	150	190	1,110	92	100	93	0	50	60	110	0	110
Pr. E north – Amber Gates	310	40	0	510	860	100	70	82	0	0	0	0	160	160
Pr. E south	50	140	540	970	1,700	0	16	9	50	140	540	730	810	1,540
Pr. F – North Pt	160	120	50	430	750	100	82	92	0	0	0	0	80	80
Pr. G – North Pt	340	130	140	160	760	58	100	69	160	50	50	250	0	250
Pr. G – Highland Pt	1,160	370	370	880	2,780	15	19	16	950	320	350	1,620	710	2,330
Pr. G – Area 3	240	50	80	200	570	0	0	0	240	50	80	370	200	570
Pr. G – Area 5	120	30	40	100	290	0	0	0	120	30	40	190	100	290
Pr. I – Summerlea	690	10	400	0	1,100	17	n/a	17	520	0	390	920	0	920
Pr. J res	440	120	280	1,580	2,430	0	0	0	440	120	280	840	1,580	2,430
Pr. K north – Bonavista	1,030	130	140	650	1,950	87	88	87	70	40	60	170	80	210
Pr. Q-1 – Ridgewood West	820	40	60	0	920	81	n/a	81	130	30	10	170	0	170
Pr. Q-10 – Sctswd Meadow	90	0	0	0	90	98	n/a	98	0	0	0	0	0	0
Pr. T – Cstlbry Meadow	310	390	120	220	1,050	97	16	80	10	0	30	30	190	220

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 total	**18,870**	**4,150**	**5,840**	**14,860**	**43,460**	**n/a**			**6,580**	**2,190**	**3,740**	**12,510**	**7,940**	**20,390**
PLANNED, BUT UNSERVICED														
AA West res – Ph 1B	480	100	150	390	1,130	n/a			480	100	150	740	390	1,130
AA West res – Ph 1C	440	90	140	360	1,030				440	90	140	670	360	1,030
AA West res – Ph 1D	470	100	150	380	1,100				470	100	150	720	380	1,100
Pr. K south	730	150	230	590	1,700				730	150	230	1,110	590	1,700
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	280	120	210	0	610				280	120	210	610	0	610
Pr. Q-4	290	120	220	0	620				290	120	220	620	0	620
Pr. Q-5	250	100	190	0	550				250	100	190	550	0	550
Pr. Q-7	70	30	50	0	160				70	30	50	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	**3,600**	**810**	**1,340**	**1,730**	**7,480**				**3,600**	**810**	**1,340**	**5,750**	**1,730**	**7,480**
UNPLANNED														
Fort Whyte	610	130	190	500	1,430	n/a			610	130	190	930	500	1,430
South Transcona	2,030	430	640	1,660	4,760				2,030	430	640	3,110	1,660	4,760
Precinct D	4,780	1,020	1,500	3,890	11,190				4,780	1,020	1,500	7,300	3,890	11,190
Precinct B	1,670	360	530	1,360	3,910				1,670	360	530	2,550	1,360	3,910
St. Vital PS – w/o St Anne's	4,660	990	1,470	7,120	10,910				4,660	990	1,470	7,120	3,800	10,910
St. Vital PS – e/o St Anne's	1,520	320	480	1,240	3,570				1,520	320	480	2,330	1,240	3,570
Wilkes South	13,960	2,970	4,390	11,370	32,680				13,960	2,970	4,390	21,310	11,370	32,680
St. Norbert – e/o by-pass	3,320	710	1,040	2,700	7,760				3,320	710	1,040	5,060	2,700	7,760
St. Norbert – w/o by-pass	5,820	1,240	1,830	4,750	13,640				5,820	1,240	1,830	8,890	4,750	13,640
Unplanned total	**38,370**	**8,160**	**12,070**	**31,270**	**89,860**				**38,370**	**8,160**	**12,070**	**56,890**	**31,270**	**89,860**

Figure 6-15: 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	2,640	200	950	1,400	5,190	66	83	71	470	160	670	1,300	240	1,530
TW – Devonshire Vlg	210	70	330	480	1,090	96	100	99	0	10	130	140	0	140
TW – Devonshire Prk	1,010	160	340	160	1,670	58	92	61	320	70	250	630	10	650
TW – Crocus	250	140	0	230	630	87	100	92	0	50	0	50	0	50
TW – SPA	130	170	110	1,160	1,560	82	46	55	20	20	30	70	630	700
North of Meadows nbhd	270	130	140	320	860	0	0	0	270	130	140	540	320	860
WW NW – Bridgwater Lakes	1,190	0	0	0	1,190	100	n/a	100	0	0	0	0	0	0
WW Town Centre	0	130	250	1,230	1,610	100	82	86	0	10	0	10	220	230
WW W – Bridgwater Trls	1,040	270	0	1,350	2,660	100	44	73	10	10	0	20	760	780
WW B – Bison Run	280	80	290	1,060	1,700	23	0	9	160	70	260	490	1,060	1,550
WW B – Rest of	600	270	370	1,080	2,320	0	0	0	600	270	370	1,240	1,080	2,320
WW SE – South Pt	1,410	0	570	410	2,390	100	100	100	20	0	0	30	0	30
WW SW – Prairie Pointe	2,080	1,160	540	870	4,650	36	45	38	1,050	960	420	2,420	480	2,900
The Oaks area	210	110	0	0	320	66	n/a	66	0	110	0	110	0	110
Ravenhurst East – Cntrbry Cross.	280	90	10	130	510	65	0	48	70	50	10	130	130	260
AA West– Ph 1A	330	150	170	390	1,040	0	0	0	330	150	170	650	390	1,040
Pr. C – Waterford Grn.	580	200	150	190	1,110	92	100	93	0	50	60	110	0	110
Pr. E north – Amber Gates	310	40	0	580	930	100	62	76	0	0	0	0	220	220
Pr. E south	40	150	570	1,050	1,810	0	15	9	40	150	570	760	900	1,660
Pr. F – North Pt	160	120	50	450	770	100	79	90	0	0	0	0	90	100
Pr. G – North Pt	310	160	160	160	780	56	100	67	130	80	70	280	0	280
Pr. G – Highland Pt	1,020	540	500	1,060	3,110	13	16	14	810	500	470	1,780	890	2,670
Pr. G – Area 3	210	100	110	240	650	0	0	0	210	100	110	410	240	650
Pr. G – Area 5	100	50	60	120	330	0	0	0	100	50	60	210	120	330
Pr. I – Summerlea	620	110	470	0	1,190	16	n/a	16	440	100	460	1,010	0	1,010
Pr. J res	370	200	340	1,950	2,870	0	0	0	370	200	340	920	1,950	2,870
Pr. K north – Bonavista	1,020	140	150	710	2,020	86	81	84	60	50	70	180	140	320
Pr. Q-1 – Ridgewood West	800	60	70	0	930	80	n/a	80	110	50	20	180	0	180
Pr. Q-10 – Sctswd Meadow	90	0	0	0	90	99	n/a	99	0	0	0	0	0	0
Pr. T – Cstlbry Meadow	310	390	120	240	1,070	97	15	79	10	0	30	30	210	240

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 total	**17,870**	**5,370**	**6,800**	**17,000**	**47,030**	**n/a**			**5,610**	**3,400**	**4,700**	**13,700**	**10,070**	**23,770**
PLANNED, BUT UNSERVICED														
AA West res – Ph 1B	410	190	220	490	1,310	n/a			410	190	220	820	490	1,310
AA West res – Ph 1C	370	170	200	440	1,190				370	170	200	750	440	1,190
AA West res – Ph 1D	400	190	210	470	1,270				400	190	210	800	470	1,270
Pr. K south	620	290	330	730	1,960				620	290	330	1,230	730	1,960
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	240	170	260	0	670				250	170	260	670	0	670
Pr. Q-4	240	170	270	0	680				250	170	270	680	0	680
Pr. Q-5	220	150	240	0	600				220	150	240	600	0	600
Pr. Q-7	60	40	70	0	170				60	40	70	170	0	170
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	**3,130**	**1,390**	**1,800**	**2,130**	**8,440**				**3,130**	**1,390**	**1,800**	**6,320**	**2,130**	**8,440**
UNPLANNED														
Fort Whyte	520	240	270	610	1,640	n/a			520	240	270	1,030	610	1,640
South Transcona	1,730	810	910	2,040	5,480				1,730	810	910	3,450	2,040	5,480
Precinct D	4,060	1,900	2,140	4,790	12,890				4,060	1,900	2,140	8,100	4,790	12,890
Precinct B	1,420	660	750	1,680	4,510				1,420	660	750	2,830	1,680	4,510
St. Vital PS – w/o St Anne's	3,960	1,850	2,090	4,670	12,560				3,960	1,850	2,090	7,890	4,670	12,560
St. Vital PS – e/o St Anne's	1,290	600	680	1,530	4,110				1,290	600	680	2,580	1,530	4,110
Wilkes South	11,850	5,540	6,250	13,990	37,630				11,850	5,540	6,250	23,640	13,990	37,630
St. Norbert – e/o by-pass	2,820	1,320	1,490	3,320	8,940				2,820	1,320	1,490	5,620	3,320	8,940
St. Norbert – w/o by-pass	4,950	2,310	2,610	5,840	15,700				4,950	2,310	2,610	9,870	5,840	15,700
Unplanned total	**32,590**	**15,230**	**17,190**	**38,460**	**103,460**				**32,590**	**15,230**	**17,190**	**65,010**	**38,460**	**103,460**

Figure 6-16: Estimated potential total and remaining units by site, Alternative Higher supply scenario

Figure 6-17 below describes an average greenfield residential density that is used to forecast build-out in the absence of more site-specific information. This methodology is further described in Step Two of Section A.1.

Greenfield sites	Units per net acre (units per net hectare)	
	Standard	Alt. higher
Sage Creek	12.6 (31.0)	12.9 (31.9)
TW – Devonshire Village	28.3 (69.9)	29.6 (73.2)
TW – Devonshire Park	13.9 (34.4)	14.8 (36.5)
TW – Crocus	14.9 (36.7)	14.8 (36.6)
TW – Special Planning Area	35.0 (86.4)	37.1 (91.6)
WW NW – Bridgwater Lakes	7.8 (19.4)	7.8 (19.4)
WW Town Centre	19.4 (48.0)	20.0 (49.4)
WW W – Bridgwater Trails	13.2 (32.6)	14.1 (34.9)
WW B – Bison Run	22.4 (55.3)	25.5 (63.0)
WW SE – South Pointe	11.4 (28.2)	11.4 (28.2)
WW SW – Prairie Pointe	14.4 (35.5)	15.9 (39.2)
The Oaks area	5.2 (12.8)	5.2 (12.8)
Ravenhurst East – Canterbury Crossing	12.2 (30.0)	13.2 (32.5)
Pr. C – Waterford Green	12.6 (31.1)	12.6 (31.1)
Pr. E north – Amber Gates	21.4 (53.0)	23.1 (57.1)
Pr. E south	46.7 (115.5)	49.9 (123.3)
Pr. F – North Point	21.1 (52.1)	21.6 (53.4)
Pr. G – North Point	19.1 (47.3)	19.8 (48.9)
Pr. G – Highland Pointe	13.7 (33.9)	15.3 (37.8)
Pr. I – Summerlea	12.6 (31.2)	13.6 (33.6)
Pr. J residential	20.8 (51.5)	24.6 (60.9)
Pr. K north – Bonavista	16.0 (39.5)	16.5 (40.9)
Pr. Q-1 – Ridgewood West	10.1 (25.0)	10.2 (25.3)
Pr. Q-10 – Scotswood Meadows	6.7 (16.6)	6.6 (16.4)
Pr. T – Castlebury Meadow	17.4 (43.1)	17.8 (43.9)
All other sites projected to an average greenfield density	15.1 (37.3)	16.0 (39.6)

Figure 6-17: Projected residential densities at full build-out, units per net acre (and hectare)

The charts below illustrate the mix of forecasted dwelling units by site using both the Standard and Alternative Higher supply scenarios. Listed sites are those with site-specific assumptions.

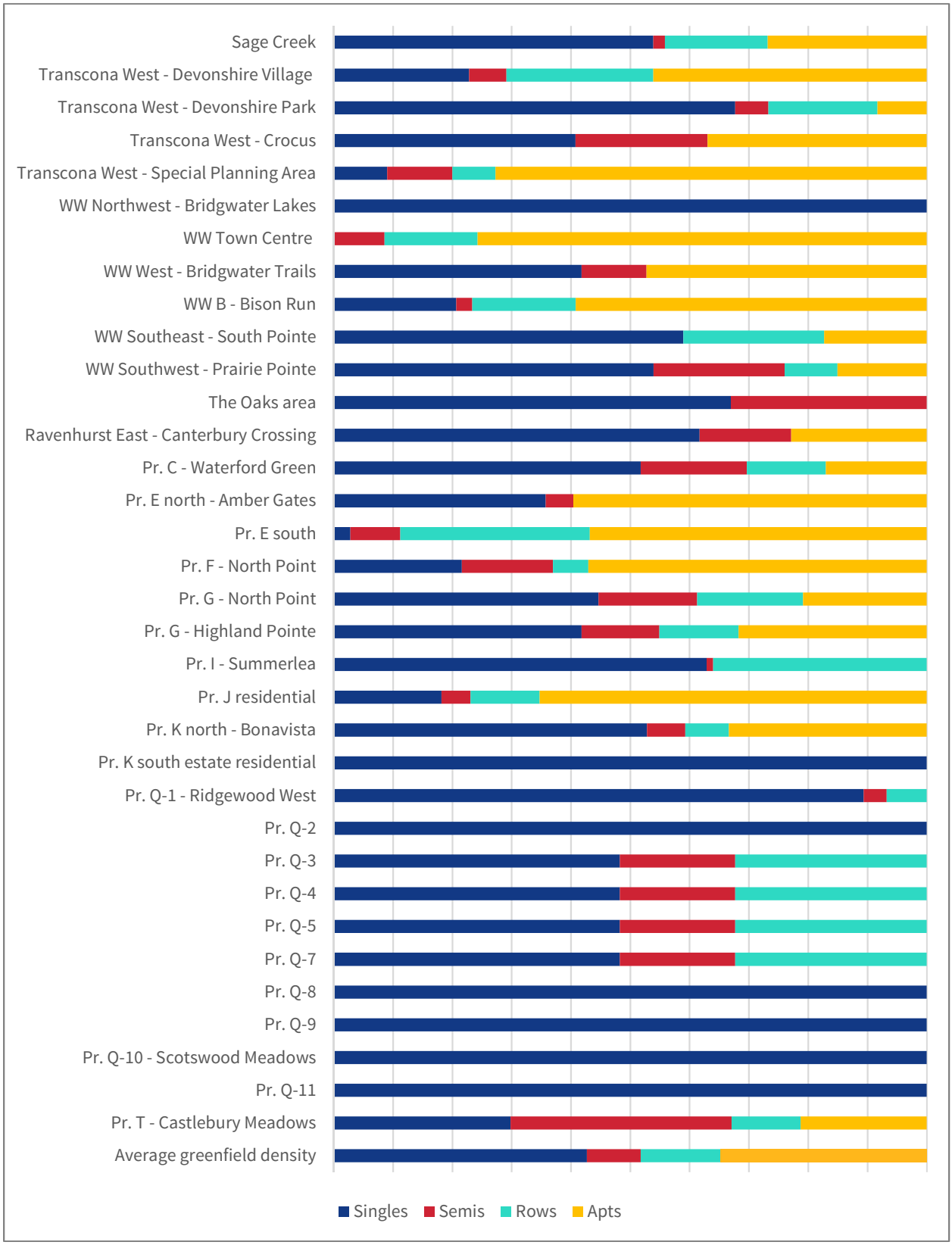

Figure 6-18: Forecasted dwelling unit mix, Standard supply scenario

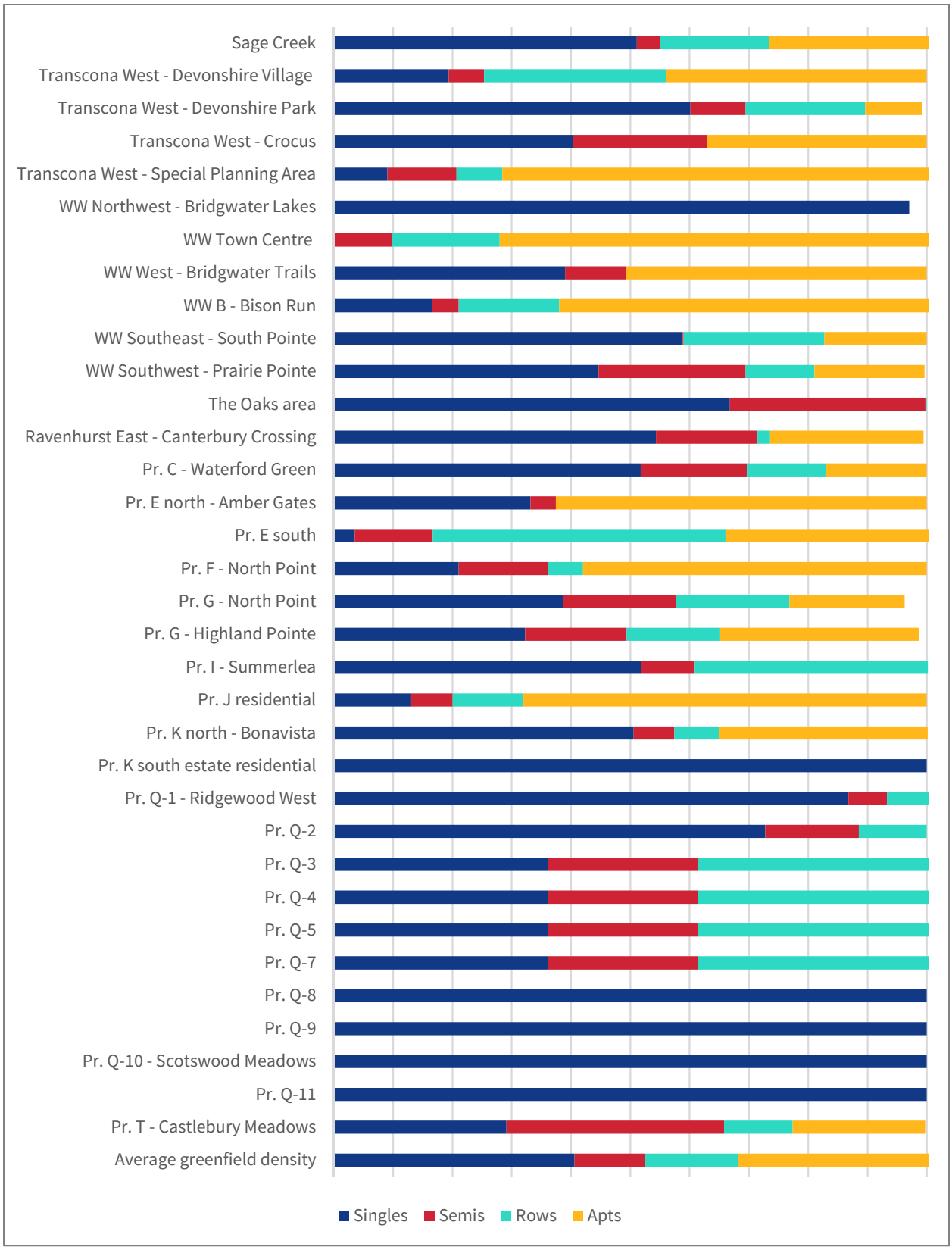

Figure 6-19: Forecasted dwelling unit mix, Alternative Higher supply scenario

As described in Section A.1, 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 the area to yield lower dwelling unit totals than what is being forecasted; high levels of land ownership fragmentation, particularly along Cadboro Rd, may reduce yields or postpone development indefinitely.
- 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.
- One stakeholder emphasized the difficulty in forecasting the three sector areas in advance of more detailed planning, noting that not all developable land will be developed for urban residential uses.
- 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.

Additional minor discrepancies between City and developer forecasts may exist, often based on intentions to file future development applications.

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 A.2. The volume of non-residential development activity in 2023 saw a notable decline from previous years.

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
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
2022	510	680	1,640	510	250	410	3,990
2023	230	310	10	420	140	420	1,530
2019-23 avg.	300	320	490	690	320	360	2,480

Figure 7-1: Non-residential development activity, 2019-23, by estimated number of jobs[1]

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
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	1.1m
2022	355,030	735,020	476,880	219,870	159,750	437,930	2.4m
2023	160,770	332,740	3,080	182,410	100,330	446,180	1.2m
2019-23 avg.	186,330	319,740	194,500	453,430	201,090	323,550	1.7m

Figure 7-2: Non-residential development activity, 2019-23, by building floor area (sq. ft.)

In 2023, notable major non-residential projects included:

- A two storey, 211,413 sq. ft. addition to an existing manufacturing/warehouse building for Winpak at 100 Saulteaux Cr in the Murray Industrial Park neighbourhood.
- A 120,640 sq. ft. warehouse addition to an existing building for Future Transfer Co. at 1 Warman Rd in the Mission Industrial neighbourhood.
- A 103,000 sq. ft. new school at 355 Des Hivernants Blvd in the Sage Creek neighbourhood.

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

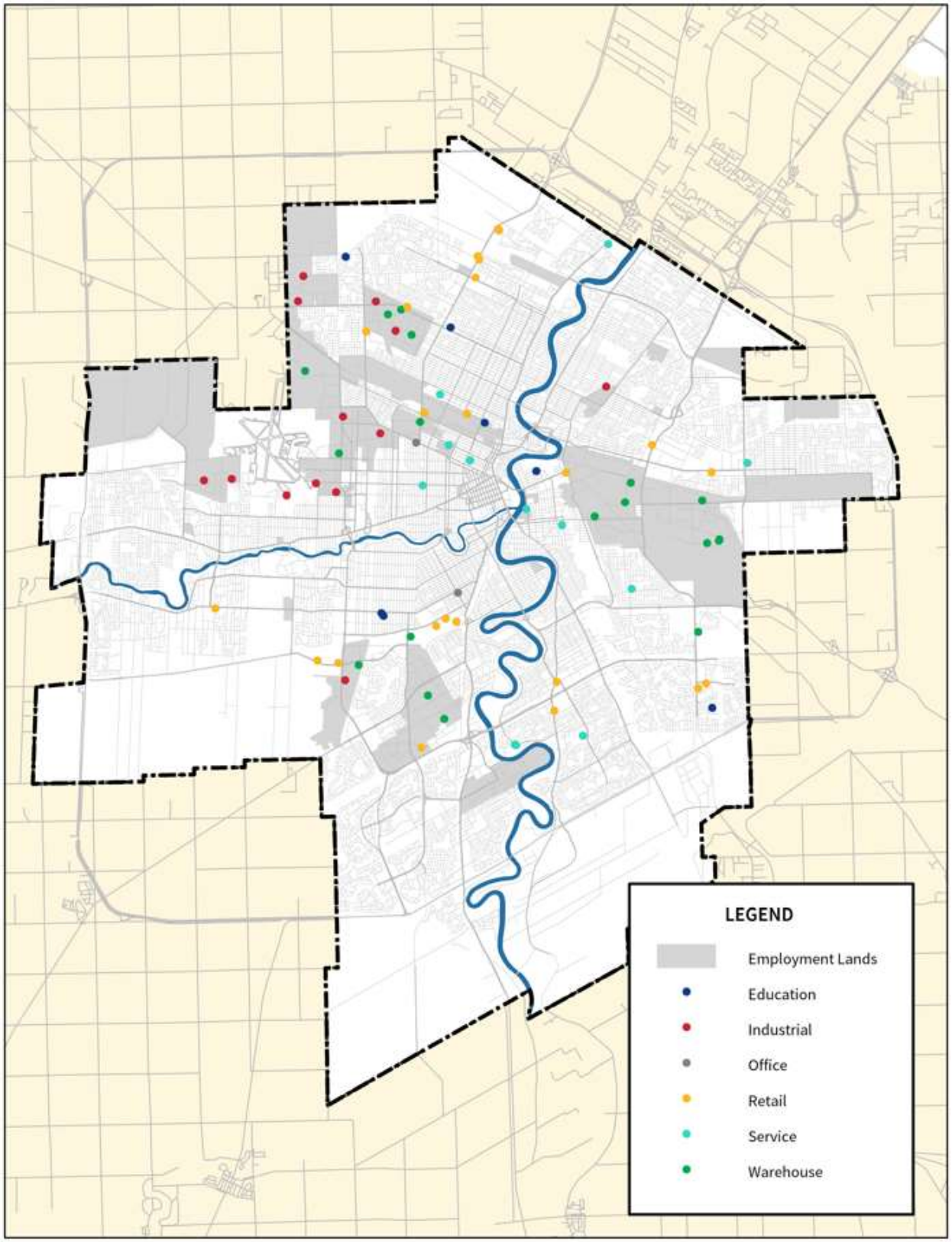

Figure 7-3: Location of non-residential development activity, 2023, by job type

Compared to previous years, the share of non-residential development occurring as building additions rather than new buildings doubled from earlier figures.

By building type	2019	2020	2021	2022	2023	2019-23 avg.
Addition	21%	27%	20%	20%	41%	26%
New building	79%	73%	80%	80%	59%	74%

Figure 7-4: Non-residential development activity by building type, 2019-23, as share of total building floor area

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

By land uptake	2019	2020	2021	2022	2023	2019-23 avg.
Absorption of vacant land	37%	51%	8%	52%	37%	41%
Intensification of developed land	63%	49%	92%	48%	63%	59%

Figure 7-5: Non-residential development activity by land uptake, 2019-23, as share of total estimated jobs

The following charts and tables 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.

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

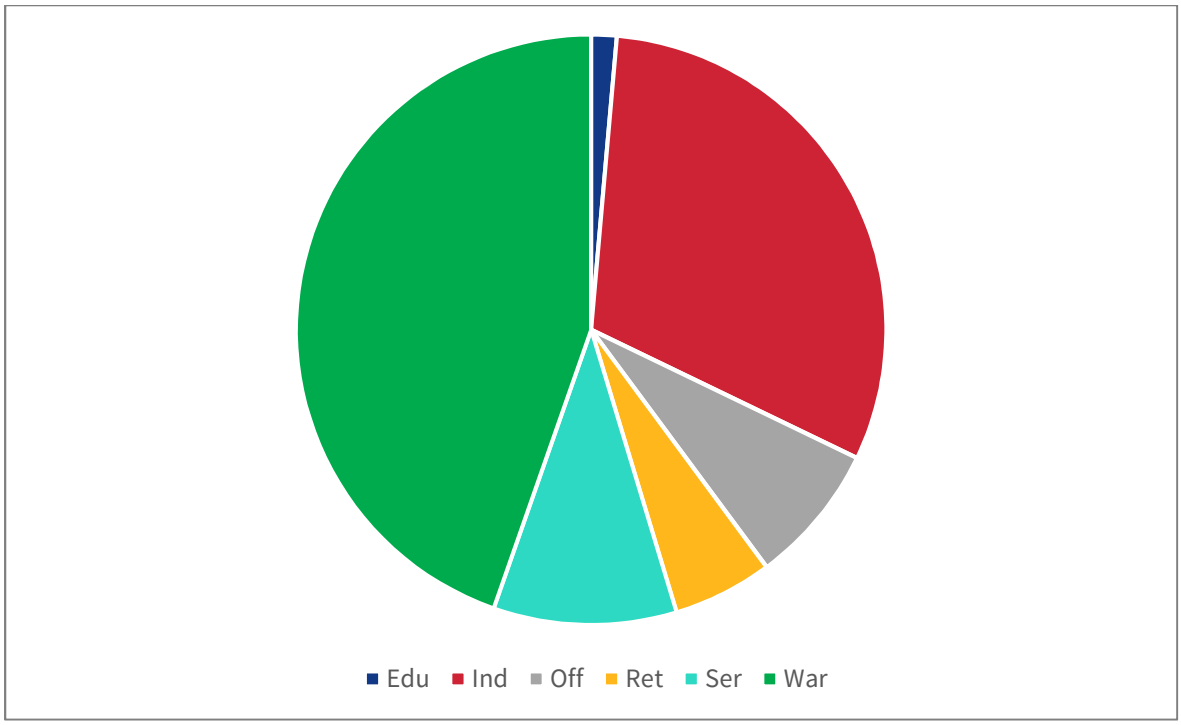

Figure 7-6: Non-residential development activity in designated Employment Lands by job type, East quadrant 2019-23

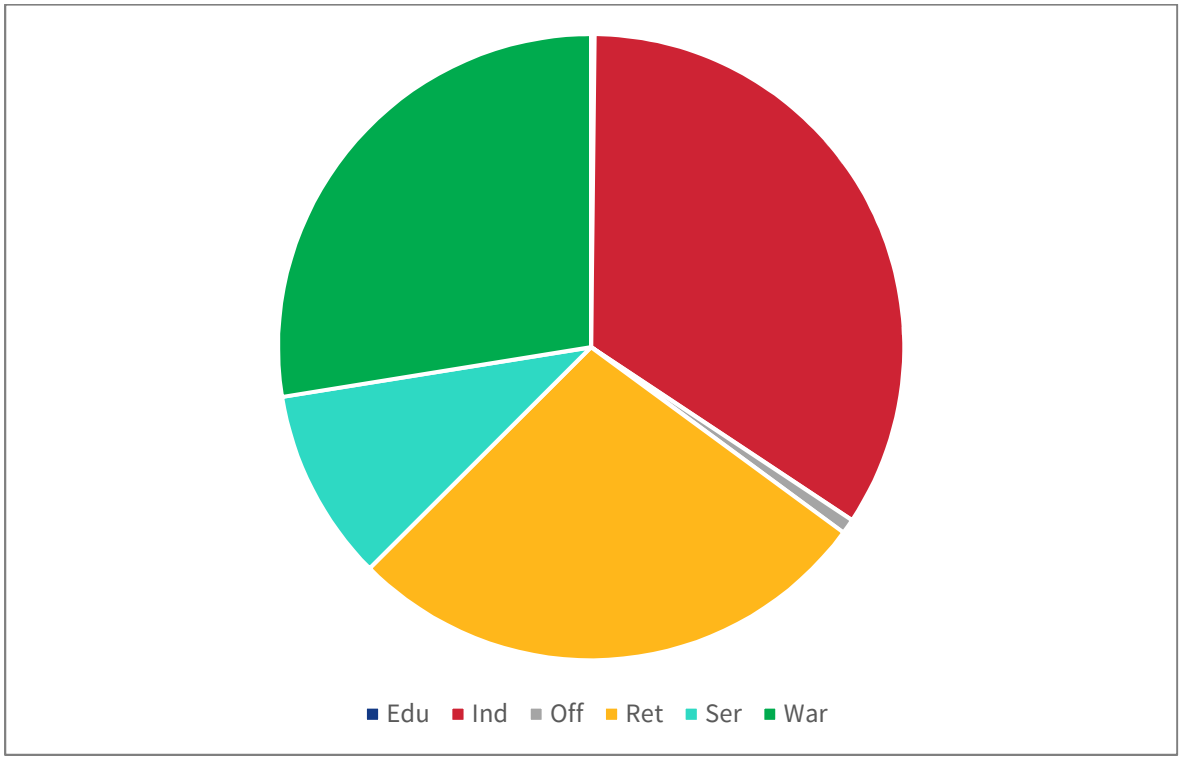

Figure 7-7: Non-residential development activity in designated Employment Lands by job type, Northwest quadrant 2019-23

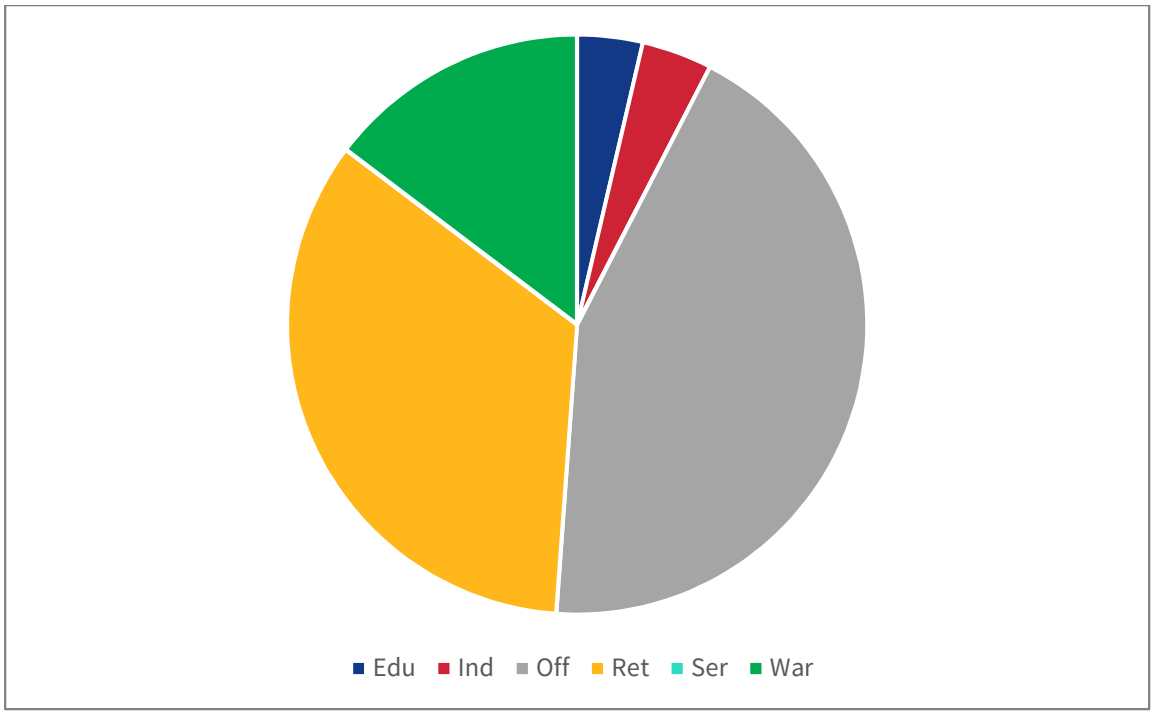

Figure 7-8: Non-residential development activity in designated Employment Lands by job type, Southwest quadrant 2019-23

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 industrial and warehousing jobs have lower job densities than other employment categories, such as offices.

Quadrant	2019	2020	2021	2022	2023	2019-23 avg
East	14%	48%	17%	43%	36%	31%
Northwest	49%	21%	79%	54%	51%	50%
Southwest	38%	31%	4%	3%	14%	19%

Figure 7-9: Non-residential development activity in designated Employment Lands by quadrant, 2019-23, as share of total estimated jobs

Quadrant	2019	2020	2021	2022	2023	2019-23 avg
East	20%	57%	19%	43%	37%	36%
Northwest	54%	30%	78%	53%	50%	52%
Southwest	26%	14%	4%	4%	14%	12%

Figure 7-10: Non-residential development activity in designated Employment Lands by quadrant, 2019-23, as share of total building floor area

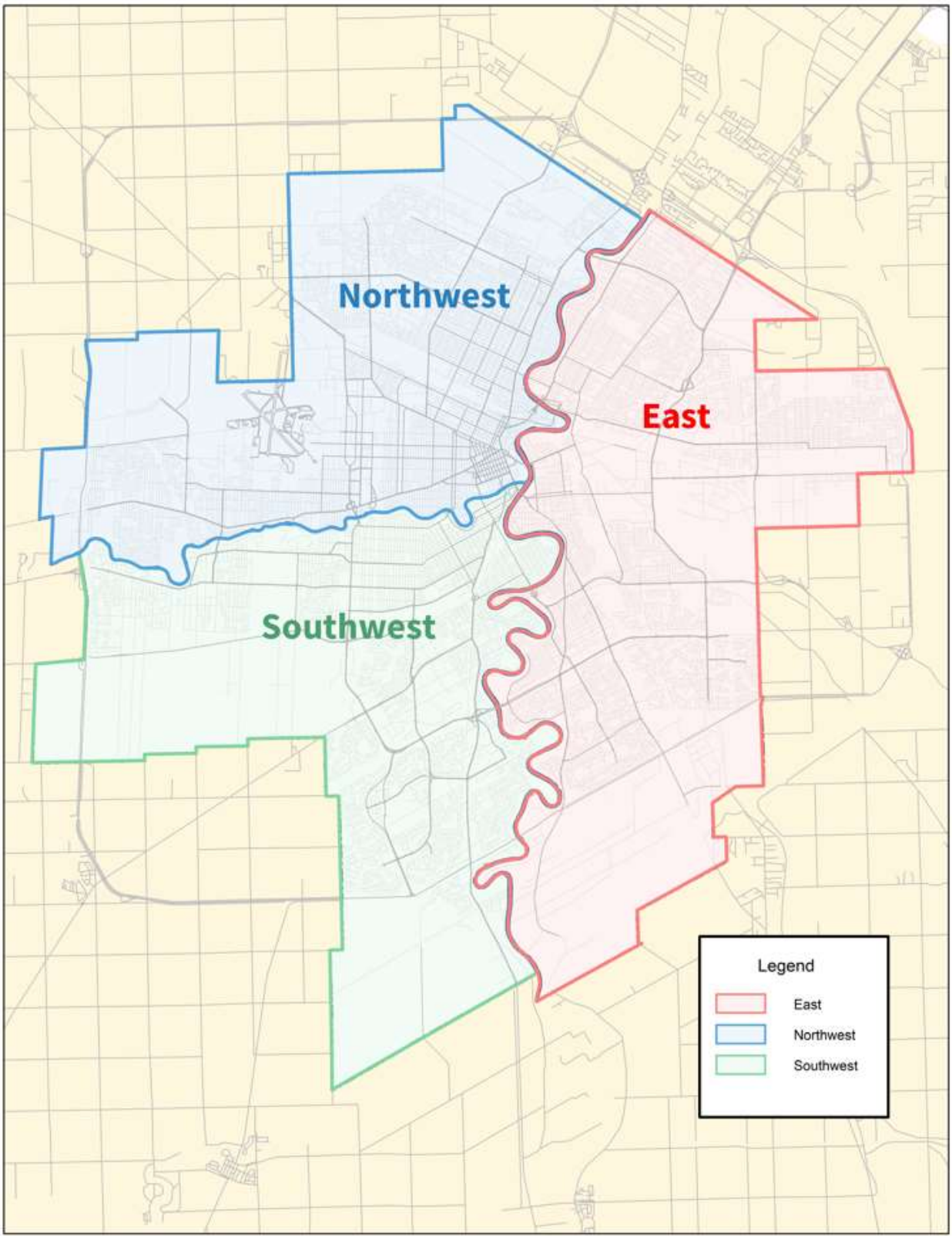

Figure 7-11: Quadrants used for measuring non-residential development activity

7.2 Industrial Absorption

The last five years saw an annual average of 71 acres (29 hectares) of vacant industrial-zoned land[1] absorbed[2] in the City of Winnipeg, with a low of 38 acres (15 hectares) in 2021 and a high of 88 acres (36 hectares) in 2023. During this time period, 190 acres (77 hectares) were absorbed in the Northwest quadrant, followed by 139 acres (56 hectares) in the East and 26 acres (11 hectares) in the Southwest. There is a high level of variability year-over-year.

Year	East	Northwest	Southwest	Total
2017	29 (12)	3 (1)	26 (10)	58 (23)
2018	16 (6)	1 (0.4)	23 (9)	40 (16)
2019	5 (2)	72 (29)	6 (2)	82 (33)
2020	47 (19)	20 (8)	17 (7)	84 (34)
2021	30 (12)	9 (4)	0 (0)	38 (15)
2022	50 (20)	13 (5)	0 (0)	63 (26)
2023	8 (3)	77 (31)	3 (1)	88 (36)
2019-23 total	**139 (56)**	**190 (77)**	**26 (10)**	**355 (144)**
2019-23 avg.	**28 (11)**	**38 (15)**	**5 (2)**	**71 (29)**

Figure 7-12: Absorption of vacant industrial-zoned land, in acres (hectares in parentheses), 2019-23[3]

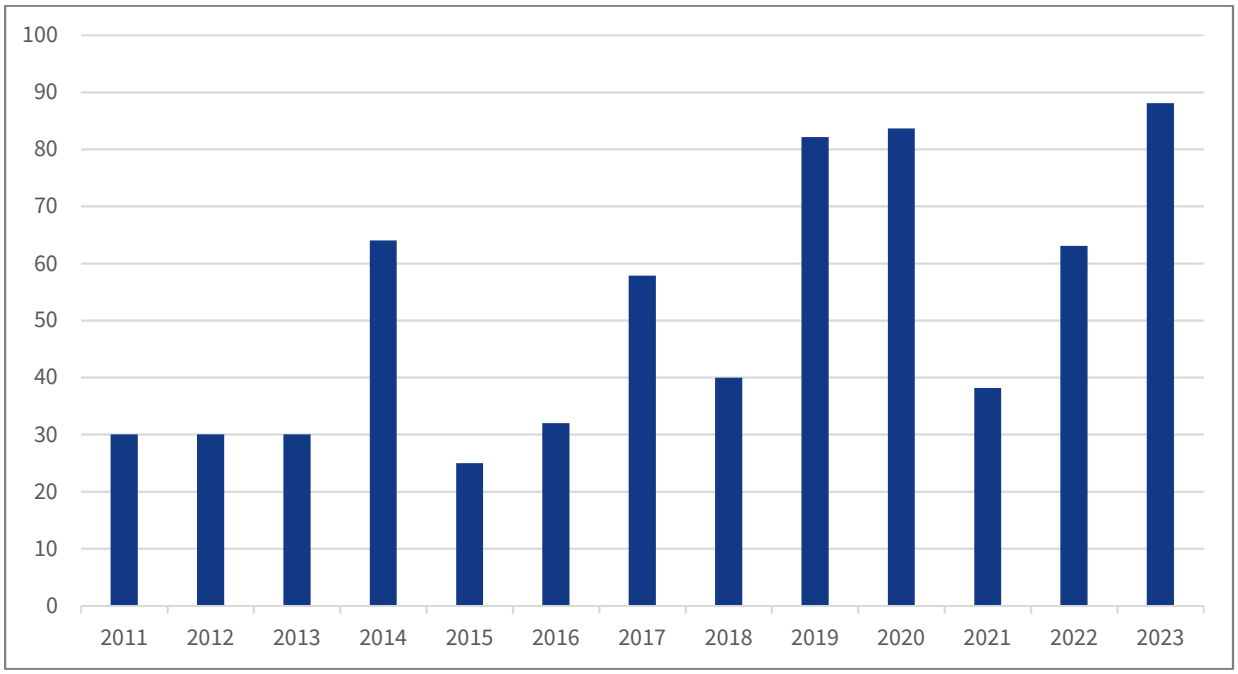

Figure 7-13: City-wide absorption of vacant industrial-zoned land, in acres, 2011-2023

[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] Figures rounded

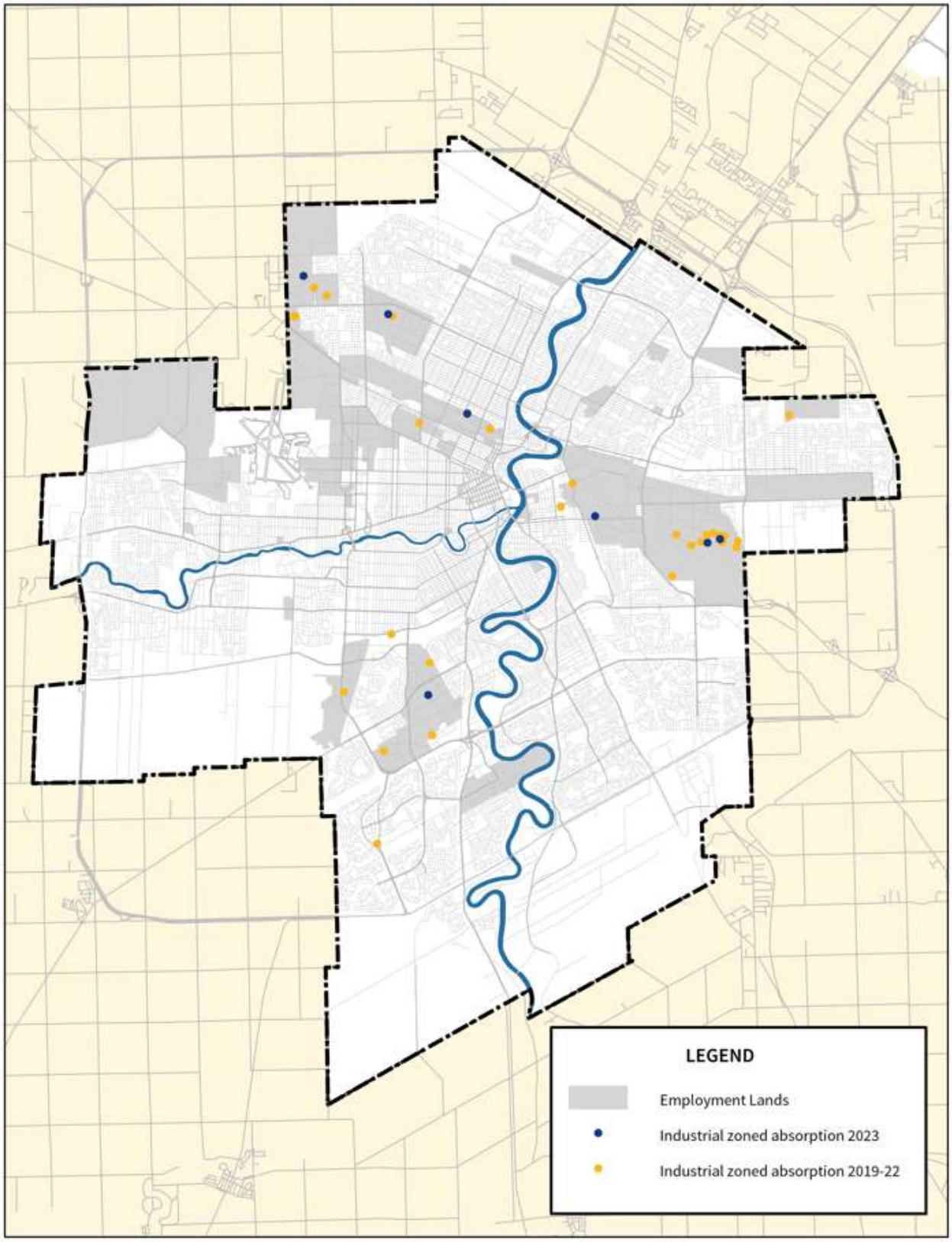

Figure 7-14: Industrial-zoned absorption, 2019-2023

This high figure in 2023 can be almost entirely attributed to a single development. In 2023, permits were granted to construct a 45,000 sq. ft. maintenance facility for Maple Leaf Construction at 285 Meridian Dr in the North Inkster Industrial neighbourhood. While this property is 77 acres in area, only a small portion of the property will be occupied by the new facility and its accessory parking area. The large remaining balance of the site will be maintained for an existing retention pond and equipment and vehicle staging area.

In the past, some stakeholders have expressed concern that the City's approach in quantifying absorption, whereby large sites are considered to be absorbed even if development occurs on only a small portion of the lot, may misrepresent development activity. As a result, rates of "adjusted absorption" were determined that only recognized the portion of a larger site that was being developed. Figure 7-15 below illustrates the difference in these two approaches. Under the first approach, the full area in orange was considered to be absorbed in 2019 following the construction of the first warehouse, with subsequent warehouse development to be considered intensification. Under the second adjusted approach, the area corresponding to the construction of the site's second warehouse (area in teal) was considered to be absorbed.

Figure 7-15: Illustration of this report's approach to absorption (orange) vs adjusted absorption (teal)

In past years, this alternative adjusted absorption approach resulted in relatively minor differences compared to the report's standard approach. However, there was a much greater disparity in 2023. The implications of these differing approaches are well-illustrated by 285

Meridian Dr. While the standard approach allocates 77 acres of absorbed land to the development, the adjusted approach only allocates 1.3 acres.

Year	Absorption in ac (hc)	"Adjusted absorption" in ac (hc)
2020	84 (34)	52 (21)
2021	38 (15)	33 (13)
2022	63 (26)	60 (24)
2023	88 (36)	31 (13)

Figure 7-16: City of Winnipeg absorption vs "adjusted absorption", 2020 to 2023, in acres (hectares in parentheses)

The table below compares City of Winnipeg absorption with figures from nearby employment areas in individual Capital Region municipalities as identified in Figure 7-18. Rural municipality absorption was determined by comparing aerial photography from June 1, 2017 to April 9, 2021 for the 2017 to 2020 period, then May 9, 2022 for the 2021 period, and finally to June 11, 2023 for the 2022 period. Properties were considered absorbed if a building was erected between the different sets of photos. These figures are then compared to City building permit data. Note that these Capital Region absorption figures should not be compared to the adjusted absorption findings in Figure 7-16 above, as they were not prepared using the adjusted methodology.

Municipality	2011-16	2017-20	2021	2022	Serviced with water and sewer
	Annual avg. in ac (hc)	Annual avg. in ac (hc)	Land absorbed in ac (hc)	Land absorbed in ac (hc)	
City of Wpg	35 (14)	66 (27)	38 (15)	63 (26)	Serviced
East St Paul (Wenzel)	0 (0)	0 (0)	5 (2)	11 (5)	Unserviced
Headingley	10 (4)	25 (10)	30 (12)	27 (11)	Serviced
Macdonald	7 (3)	9 (4)	10 (4)	10 (4)	Serviced
Rosser	22 (9)	41 (17)	87 (35)	41 (17)	Serviced
Springfield	7 (3)	13 (5)	13 (5)	2 (1)	Not serviced
West St Paul	3 (1)	7 (3)	11 (5)	0 (0)	Kapelus Rd is serviced, West St Paul Industrial Area is not

Figure 7-17: Industrial land absorption, City of Winnipeg and Capital Region employment areas, 2017-22, in acres (hectares in parentheses)

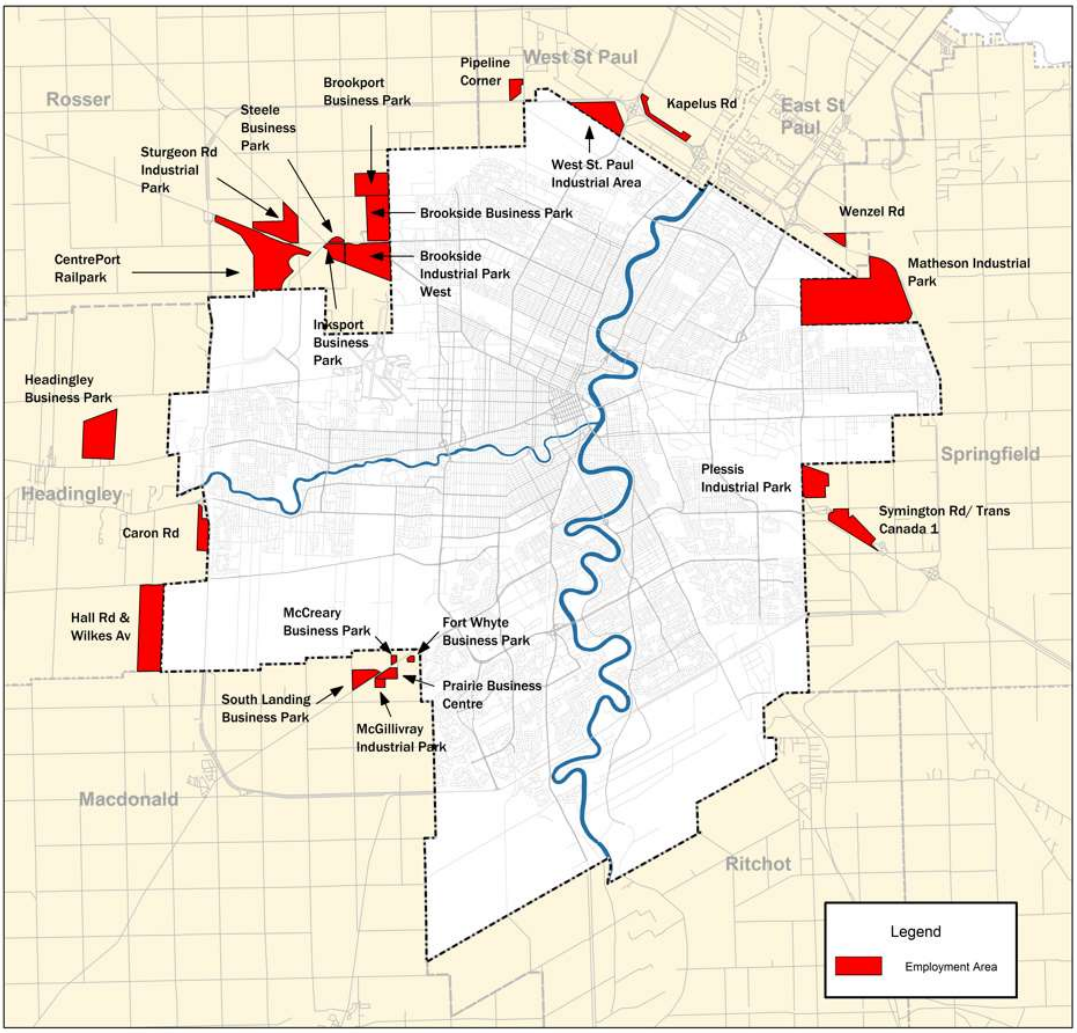

Figure 7-18: Selected Capital Region employment areas adjacent to the City of Winnipeg

Between 2021 and 2022, the City's share of overall Capital Region employment land absorption increased from 21% to 41%. This is in line with recent shares dating back to 2011.

Jurisdiction	Land absorption							
	2011 to 2016[1]		2017 to 2020		2021		2022	
	Ac (hc)	%	Ac (hc)	%	Ac (hc)	%	Ac (hc)	%
City of Wpg	213 (86)	35	264 (107)	41	38 (15)	20	63 (26)	41
Selected Capital Region	395 (160)	65	379 (153)	59	156 (63)	80	91 (37)	59
Total	608 (246)	100	643 (260)	100	183 (74)	100	154 (62)	100

Figure 7-19: Industrial land absorption, City of Winnipeg and selected Capital Region employment areas

[1] Figures from pg 4-27, City of Winnipeg 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 A.2, this analysis considers several categories of industrial land supply. All told, it identified 308 acres of unencumbered[1], shovel-ready (i.e. both regionally and locally serviced[2]), vacant industrial land in the City of Winnipeg as of January 1, 2024. Based on the Employment Land demand analysis prepared for the Winnipeg Metropolitan Region's Plan 20-50, this translates to 5.3 years. Additional supply exists where sites may be locally serviced but encumbered, locally unserviced but regionally serviced, 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		Designated	Intensification potential
		Shovel-ready, unencumbered	Locally unserviced[4]		
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

Figure 8-1: Estimated vacant industrial land supply, City of Winnipeg, as of January 1, 2024

Decreases from last year can be attributed to industrial land absorption, including 285 Meridian Dr as well as other smaller parcels such as in St Boniface Industrial and Fort Garry Industrial. In-depth stakeholder review also refined this analysis.

[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 A.2 for more information.

[4] Locally unserviced supply includes encumbered sites.

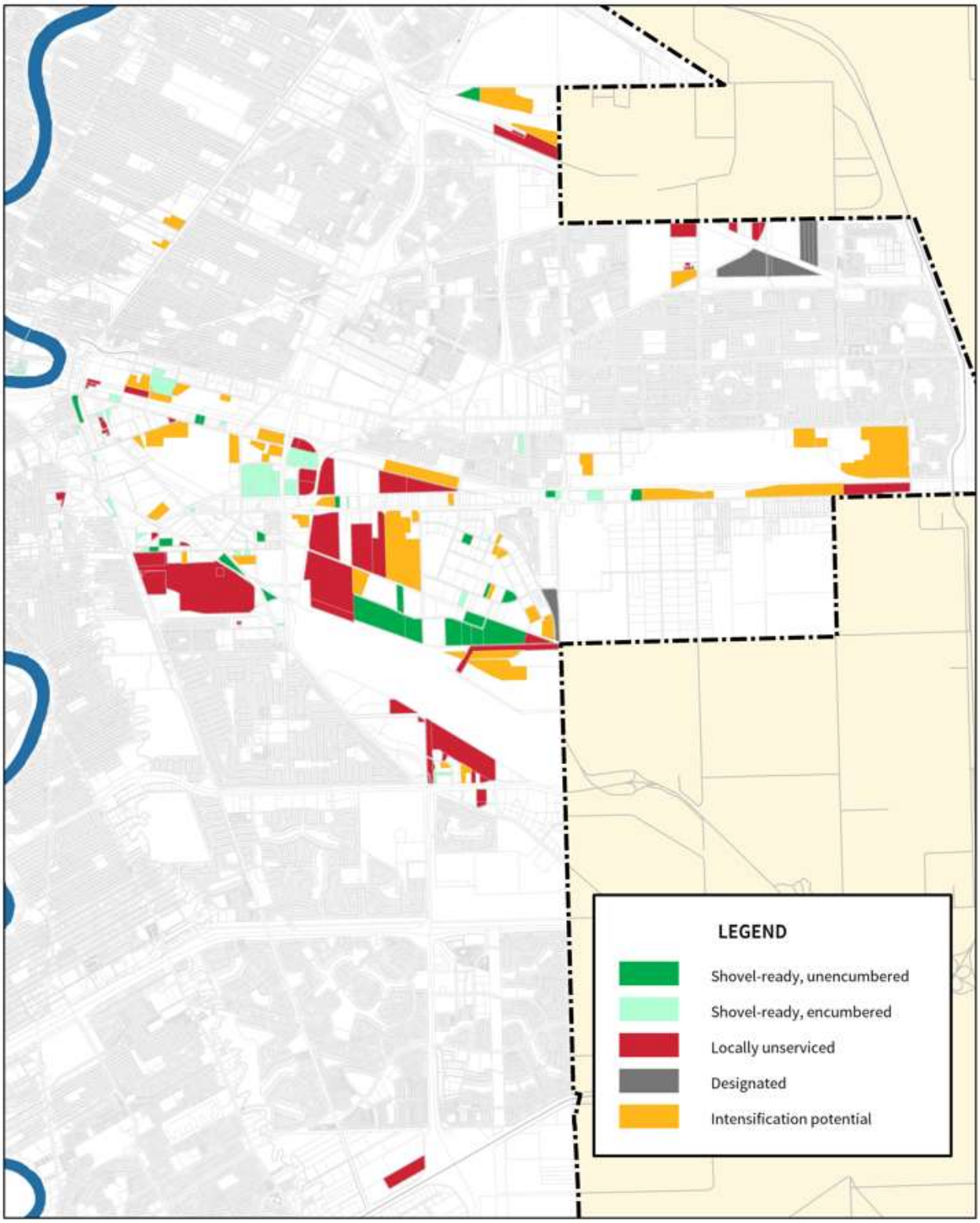

Figure 8-2: Map of estimated vacant industrial land supply, City of Winnipeg East quadrant, as of January 1, 2024

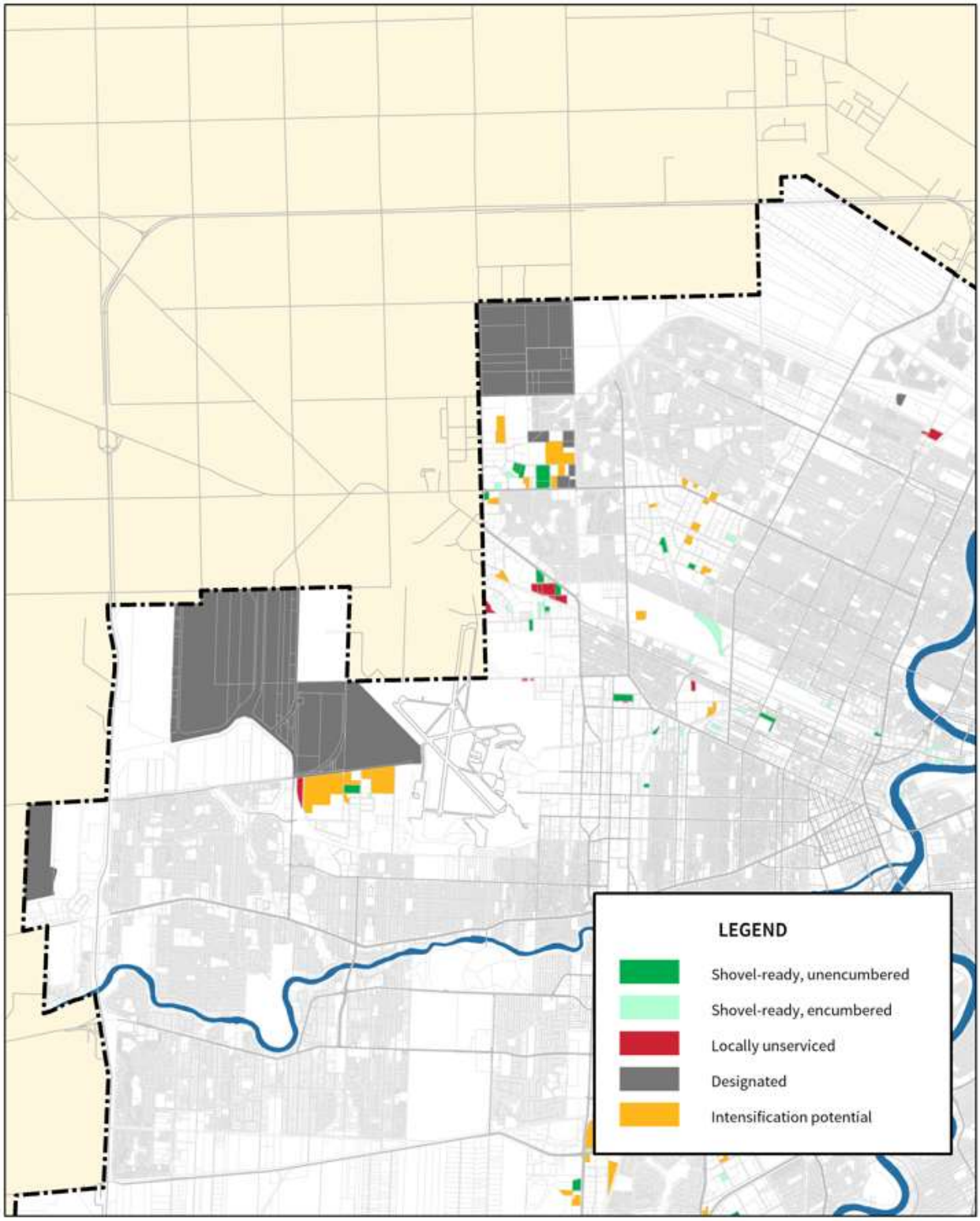

Figure 8-3: Map of estimated vacant industrial land supply, City of Winnipeg Northwest quadrant, as of January 1, 2024

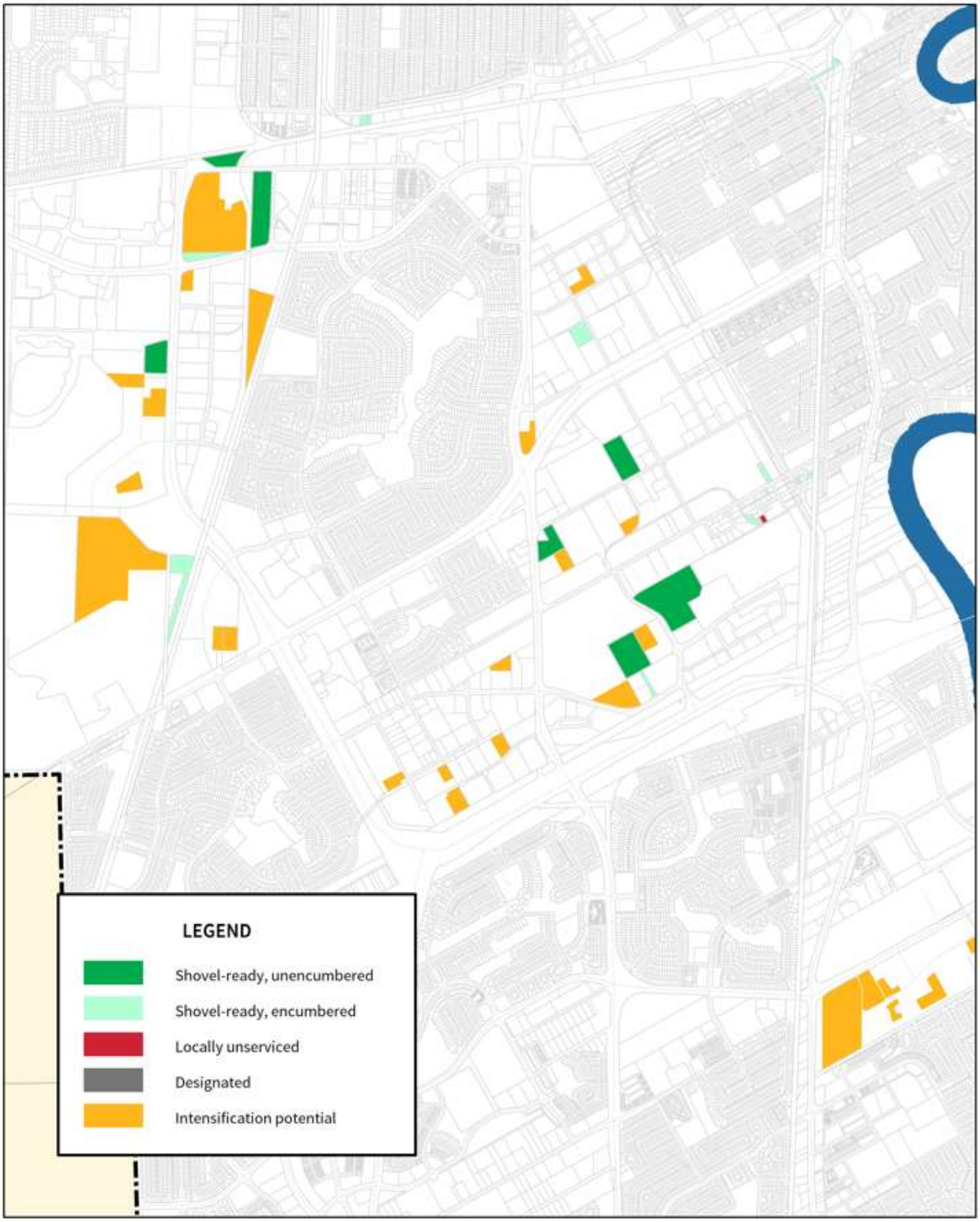

Figure 8-4: Map of estimated vacant industrial land supply, City of Winnipeg Southwest quadrant, as of January 1, 2024

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		Designated	Intensification potential
	Shovel-ready, unencumbered	Locally unserviced		
Land area on sites > 5 ac	236	454	n/a	721
Land area on sites > 10 ac	149	339	n/a	591
East quadrant	162	506	62	453
Northwest quadrant	80	62	2,255	221
Southwest quadrant	65	0	0	183

Figure 8-5: 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		Intensification potential
	Shovel-ready, unencumbered	Locally unserviced	
All Emerging Sites	163	236	182
Cavalia Lands	16	0	35
Inksbrook	30	0	75
Public Markets	0	73	2
St Boniface Industrial	116	163	71
Smart Park	0	0	38

Figure 8-6: Estimated vacant industrial land supply within identified industrial Emerging Sites

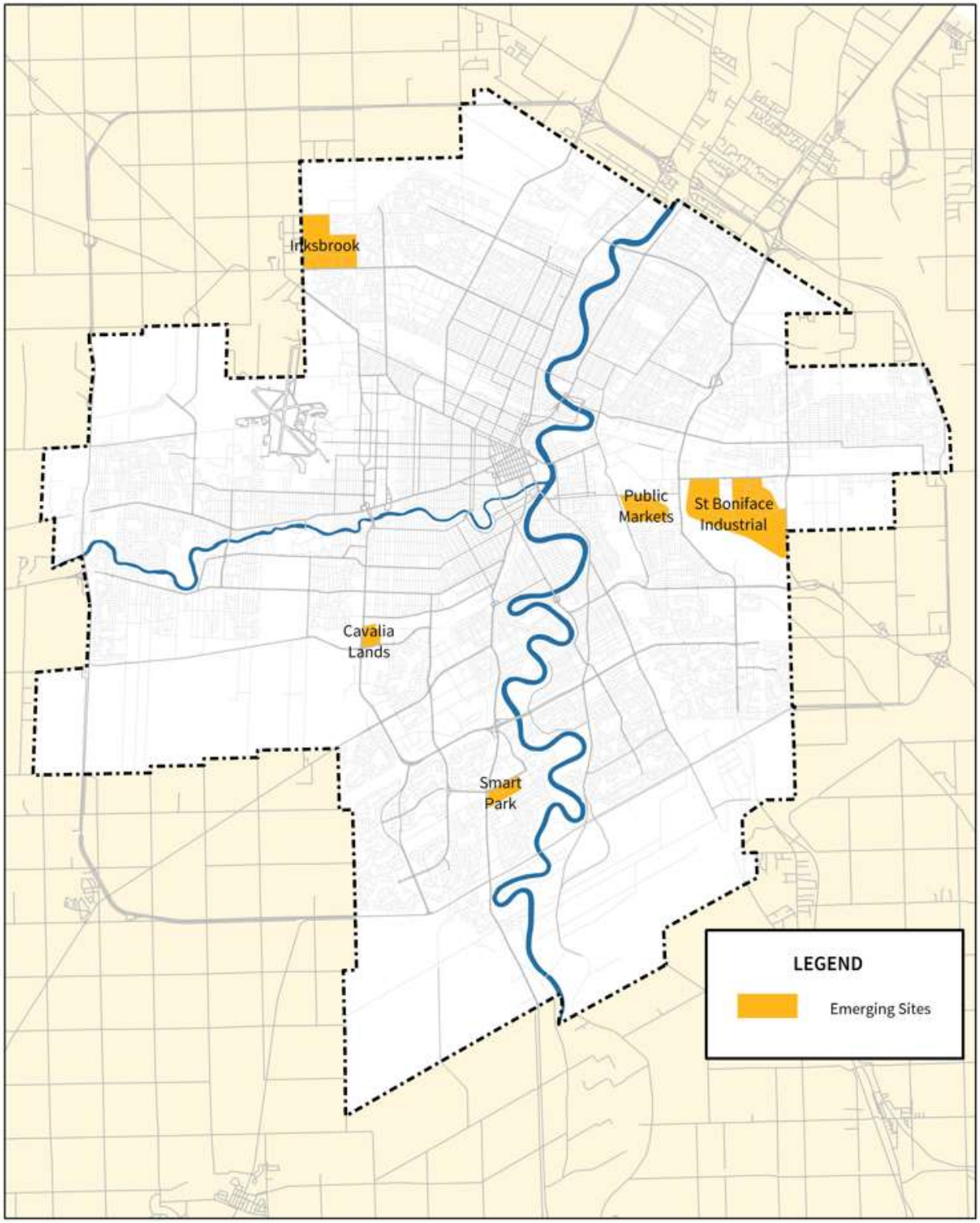

Figure 8-7: Identified industrial Emerging Sites

Previous reports have provided comment on the nature of this supply. While at first glance this supply may seem reasonable, these numbers fail to tell the full story as it relates to the

City's stated aims of accommodating forecasted industrial growth and promoting competitiveness and economic diversity. 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, stakeholders have previously emphasized that much of this supply may not be actively marketed at a given time or held by a property owner willing to sell. As a result, this analysis compiled active listings on CommercialExchange.com (Moody's CRE) for vacant industrial lots for sale in both the City of Winnipeg and adjacent rural municipalities at a point in time – in this case, April 22, 2024. It should be stressed that this information is only based on a single point in time, and that the limited size of this dataset may not fully convey market conditions. It may also fail to capture properties that are not listed on the website, or those that may be listed as a non-industrial property likely to be rezoned. This dataset should be renewed regularly.

Municipality	Vacant industrial land for sale[1]	Serviced with piped water and sewer	Avg. price per acre[2]
Headingley	83	Serviced	$303k
Macdonald	40	Serviced	$485k
Rosser	None	Serviced	None
Springfield	18	Not serviced	$226k
West St Paul	5	Serviced in part	$399k
Winnipeg - Northwest	7	Serviced	$466k
Winnipeg – East	49	Serviced	$378k
Winnipeg - Southwest	39	Serviced	$813k

Figure 8-8: Available vacant industrial land for sale as per CommercialExchange.com, as of April 22, 2024

In January 2023, the Province of Manitoba announced funding for the servicing of the first phase of CentrePort South which, combined with Council's share, have enabled its development. Detailed design is complete and construction tenders have been awarded, while substantial completion of the regional infrastructure is planned for 2026. However, until services are installed in this area, the City's industrial land supply should be considered constrained. Future phases are unfunded.

Additional consideration of City-owned sites is warranted. Cities often own vacant industrial land to facilitate economic development opportunities. As of August 12, 2024, there is 81 acres of vacant serviced industrial land available for sale in the St Boniface Industrial Park. These lands would be considered shovel-ready.

[1] Properties for lease excluded from this analysis.
[2] Average based only on properties where price per acre was listed.

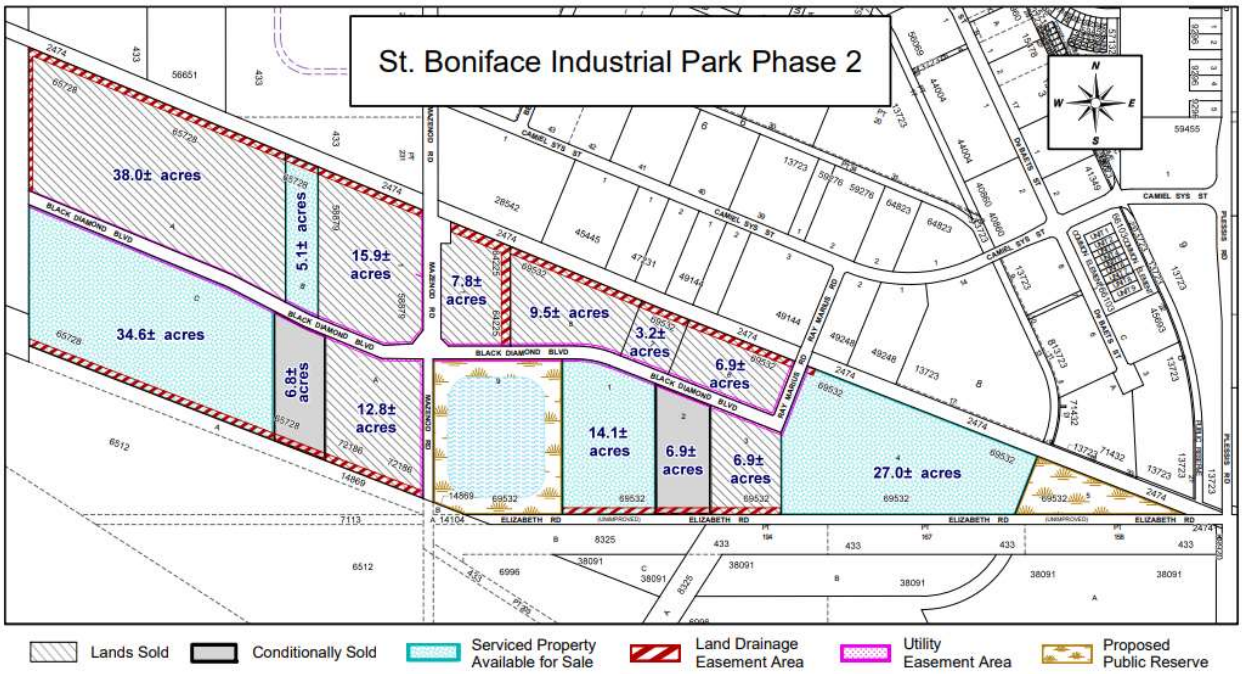

Figure 8-9: Available City-owned vacant industrial land for sale as of August 12, 2024

8.2 Commercial Land Supply

This analysis identified a vacant commercial land supply of 554 acres (224 hectares) as of January 1, 2024. This supply is comprised of a few separate categories: vacant commercial-zoned land, land located in Regional Mixed Use (RMU) 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 RMU Centres and Emerging Sites. With a forecasted demand of 370 ac (150 ha) to 2041, this represents approximately 26 years of supply. A comparison with last year's results is provided below.

	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

Figure 8-10: Commercial supply and forecasted demand as of January 1, 2024, and compared to January 1, 2023

Compared to last year's report, the City's supply of vacant commercial-zoned land decreased as a result of absorption in Precinct F, Taylor Lands, and Waverley West Town Centre. As previously vacant lots were absorbed at less than 25% lot coverage, this has created opportunities for intensification, accounting for the slight increase in available supply in the continued building-out in existing sites.

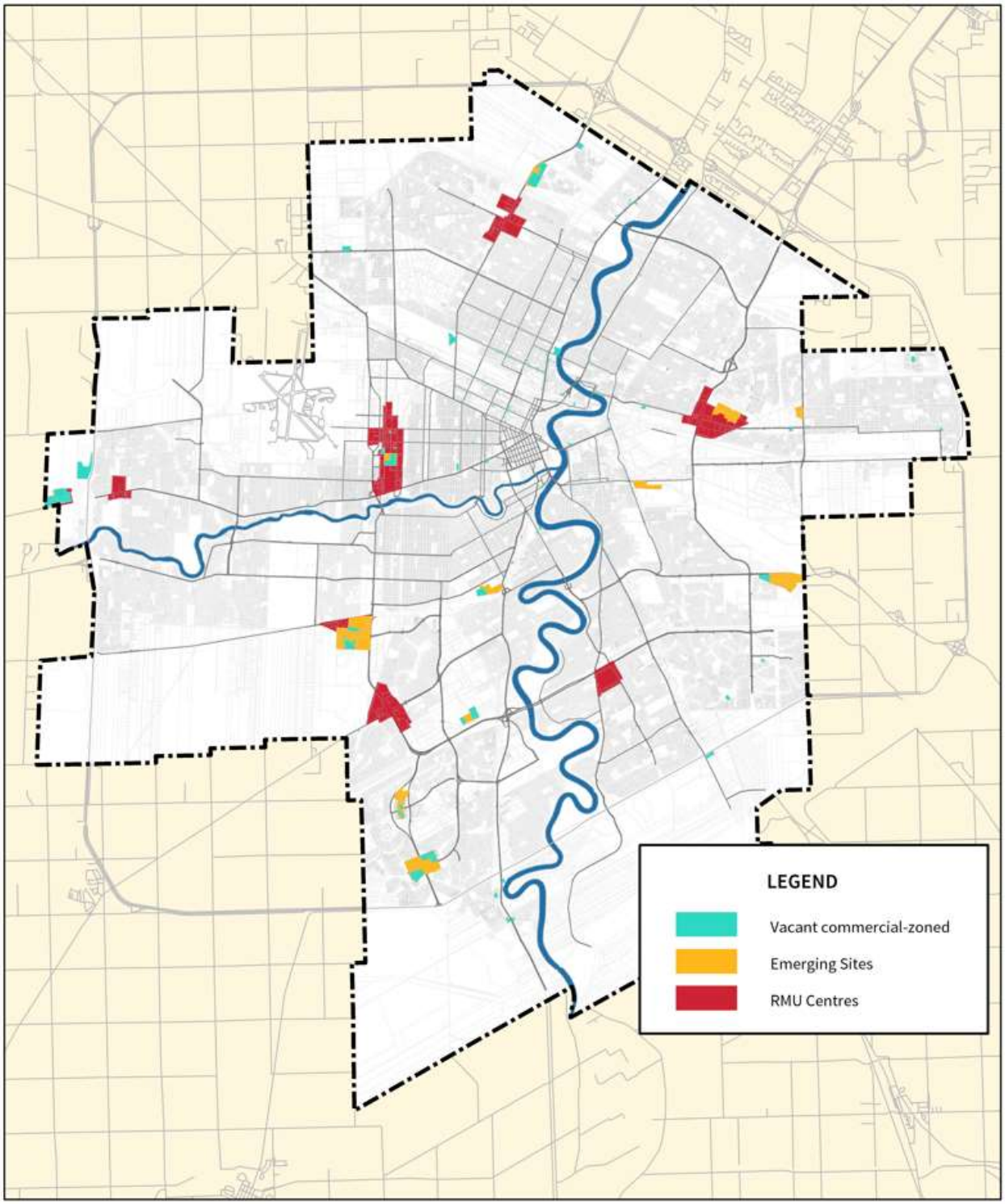

Figure 8-10: Map of commercial supply

The continued build-out of RMU 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 (ha)	Approved but non-vested land, ac (ha)	Lot coverage[1], %[2]	Intensification potential[3], ac (ha)
Emerging Sites	205 (83)	172 (70)	n/a	43 (17)
Old Stadium site	16 (7)	-	0.14	0 (0)
Outlets of Tuxedo[4]	5 (2)	-	0.22	4 (2)
Precinct J	0 (0)	71 (29)	0.00	-
Precinct F	37 (15)	-	0.01	4 (2)
Public Markets	0 (0)	27 (11)	0.00	-
Ravelston-Plessis	0 (0)	-	0.19	3 (1)
Reenders	0 (0)	27 (11)	0.00	-
Seasons of Tuxedo	14 (6)	-	0.15	18 (7)
Sugar Beets	15 (6)	-	0.04	6 (2)
Taylor Lands	11 (5)	-	0.13	7 (3)
Waverley West South Pointe	39 (16)	47 (19)	0.02	1 (0)
Waverley West Town Centre	5 (2)	-	0.25	0 (0)
Westport Festival	62 (25)	-	0.00	-
Regional Mixed Use Centres	81 (33)	n/a	n/a	9[5] (4)
Kenaston-McGillivray	0 (0)		0.24	7 (3)
McPhillips-Leila	0 (0)		0.27	0 (0)
Polo Park	20 (8)		0.34	0 (0)
Regent-Lagimodiere	2 (1)		0.26	0 (0)
Seasons of Tuxedo	16 (7)		0.22	~~7 (3)~~
St Vital	2 (1)		0.30	0 (0)
Unicity	1 (0)		0.24	2 (1)
Westport Festival	40 (16)		0.02	3 (1)

Figure 8-11: Commercial supply by commercial Emerging Sites and Regional Mixed Use Centres

[1] Based on the total area of the Emerging Site/Regional Mixed Use Centre.
[2] Full build-out is considered to be 25%, as per p. 9-10, City of Winnipeg Employment and Commercial Lands Study, May 16, 2018.
[3] Represents a land area equivalent considering the intensification potential of existing occupied sites up to a 25% lot coverage.
[4] The combined total for Outlets of Tuxedo and Seasons of Tuxedo under Emerging Sites do not equal the Seasons of Tuxedo total under RMU Centres because the geographies are slightly different.
[5] Seasons of Tuxedo excluded from RMU Centre Intensification Potential summary, as this land was already accounted for under Emerging Sites.

Recent years has seen an increase in residential development activity within or immediately adjacent to these sites. The last five years have seen the following number of units having been built as part of the larger developments, demonstrating increased industry interest in mixed use but also a softening of demand for exclusively commercial land. These number figure to increase going forward in light of Council's recent decision to further facilitate residential development on mall sites and corridors.

Site	No. of units
Outlets of Tuxedo	218
Precinct F	176
Ravelston-Plessis	390
Sugar Beets	1,066
Taylor Lands	124
Waverley West Town Centre	789
Westport Festival	395

Figure 8-12: New residential units within or immediately adjacent to commercial Emerging Sites, 2019-23

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].

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

9.0 Growth Management

9.1 Achieving the Intensification Target

The General Growth section of *Complete Communities 2.0* (CCDS) 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 intensification rates in excess of the 50% target are forecasted to continue based on existing development trends, this is not guaranteed. Without continued measures to facilitate it, it is expected that 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. 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	Rapid zoning bylaw amendments	In the last year, Council approved two and a half rounds of rapid zoning bylaw amendments to improve permit processing and accelerate housing. On February 22, 2024, Council approved a first bucket of improvements focused on development permit exemptions. These exemptions will allow minor construction projects such as fences, hot tubs, and garages to move directly to the building permit stage, saving applicants both time and money. On May 30, 2024, Council approved a second bucket of amendments to increase as-of-right housing options, encourage infill opportunities, and enable more flexible zoning entitlements. These amendments were intended to facilitate the development of single-detached, semi-detached, and multifamily dwellings up to three units in designated Mature Communities. These amendments also allowed for the "as-of-right" development of detached secondary suites in Established Neighbourhoods, and reduced parking requirements for multi-family housing in Mature Communities and along Pembina Hwy and Portage Ave. Downtown Zoning By-law no. 100/2004 was also amended to remove regulatory barriers when converting existing buildings to residential uses. On November 21, 2024, Council approved the first of two phases of a third bucket of amendments introducing a Planned Development Overlay (PDO) to facilitate as-of-right development in mall sites and along designated Corridors. A second phase is planned to follow in 2025 more broadly enabling two-, three-, and four-unit dwellings. Both the second and third buckets of amendments were undertaken in part to satisfy the City's Housing Accelerator Fund agreement with the Government of Canada.
Development regulations and financial incentives	Housing Accelerator Fund	On December 5, 2023, the Government of Canada, through the Canada Mortgage and Housing Corporation (CMHC), entered into an agreement with the City of Winnipeg for $122.4m in funding from the Housing Accelerator Fund. Since then, the City has begun implementing its program by:

Tool	Initiative	Description
		- Preparing rapid zoning by-law amendments to facilitate housing as described above. Local area plans will be amended as needed. - Establishing an Affordable Housing Concierge service to act as a single point of contact to assist non-profit and/or Indigenous housing providers plan their applications, coordinate expedited review, and otherwise guide them through the approvals process. Eligible projects must meet affordability requirements. - Awarding $25m for 11 affordable housing projects and projects in Downtown Winnipeg as part of the first round of the Capital Grant Incentive program. Awarded projects are expected to create a total of 1,135 new dwelling units. Of these units, 597 will be affordable units, and 613 will be located Downtown. Future rounds of funding will be open at a later date.
Financial incentives	Tax Increment Financing	In addition to those approved under the Affordable Housing Now program, the City has approved a number of TIF grants enabling residential and supportive commercial development over the last year: - On September 26, 2024, Council approved a $13.6m tax increment financing grant equal to support the redevelopment of Portage Place Mall by True North Real Estate Development Limited. - The Public Service approved a grant to a maximum of $134.3k over 10 years to enable the Rainbow Resource Centre Place of Pride project at 545 Broadway Ave, which will include 21 dwelling units in addition to clinic and community spaces.
Financial incentives	Housing Initiatives	The City of Winnipeg has been administering a number of housing initiatives that will help contribute to residential development in the intensification target area.

Tool	Initiative	Description
		- The Affordable Housing Now program continues to administer Tax Increment Financing and Capital Grant funding to multi-family housing projects that include affordable housing. As of Fall 2024, 13 projects had been approved under AHN, facilitating the creation of a total of 1,392 units, including two in 2024. Priority is given to projects located Downtown and in Winnipeg's five Housing Improvement Zones (HIZs). - The Public Service continues to administer the federal Rapid Housing Initiative program by monitoring the development of projects who have previously received funding. Successful projects are located in the intensification target area. - Modest funding opportunities to support the creation of affordable housing, prioritizing HIZs, through the City's Housing Rehabilitation Investment Reserve, which received $1m in the 2024 Budget. On July 18, 2024, Council expanded its preexisting "Creating Affordable Housing Opportunities in Housing Improvement Zones" by amending its Real Estate Policy Framework. The Framework now allows for the sale of City-owned land City-wide to non-profit housing developers for as low as $1.00.
Financial incentives	Portage Place redevelopment	On September 26, 2024, Council voted to support the redevelopment of Portage Place Mall by True North Real Estate Development Limited. It did so by approving the Purchase and Sale Agreement as a shareholder of North Portage Development Corporation, the owner of the mall. It also did so by approving: - A $13.6m tax increment financing grant equal to 80 percent of the incremental municipal property taxes generated by this development over 25 years; - A grant up to $10m from the City's Housing Accelerator Fund to support the housing component; - Up to $7.5m to extend Edmonton St north of Portage Ave and to upgrade other streets nearby; - Up to $6.5m to cost share a new publicly accessible skywalk, repair existing skywalks, and to provide lighting and security features; and - Up to $2.1m to support a community drop in space to be located within the development.

Tool	Initiative	Description
		The redevelopment will see the construction of a healthcare centre, 200+ multifamily units, 40% of which will be rented below 80% of median market rents for the area, public and commercial space, and an extension of Edmonton St from Portage Ave to the Promenade north of the mall.
Infrastructure	Active transportation	In its 2024 Budget, Council allocated $2.16m to the Pedestrian and Cycling Program. This figure compares to a 2019-23 annual average of $2.7m and a planned annual average of $5.8m from 2025-29. Also of note is that the budget is forecasting $1.1m in 2025 for the functional design for AT grade separation across the CN main line at the Osborne St underpass (and $1.5m for detailed design in 2028).
Infrastructure	North End Sewage Treatment Plan	The North End Sewage Treatment is being upgraded to the meet the requirements of its Environmental Act license with the Province and to accommodate forecasted growth. Providing 70% of the City's wastewater treatment and 100% of the City's biosolids treatment, ensuring sufficient treatment capacity is critical to ensuring the City can continue to accommodate infill and greenfield growth alike. The plant is being upgraded in three separate projects. The first phase, "Power Supply and Headworks Facilities", is providing a new power substation as well as new pumps and improved screening and grit removal. This project is approved and funded. The second phase, "Biosolids Facilities", will expand existing facilities that treat sludge generated from all three of the City's plants before this byproduct can be properly disposed. This is needed to support future development in both greenfield and infill areas. Reports regarding its biosolids treatment capacity are provided annually to the Standing Policy Committee on Water, Waste, and Environment. This project is approved and funded. In 2024, the City selected their development partner and started the project's design. Early works construction is planned to begin in 2025, with the main construction set to begin in 2026.

Tool	Initiative	Description
		The planned third phase of treatment plant upgrades is currently unfunded at an estimated cost of $810m as of 2018. However, it is related to nutrient removal and should not be a limiting factor with regards to intensification.
Infrastructure	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 public realm improvements via the COVID-19 Economic Response and Recovery Plan and Downtown Recovery Strategy. Implementation continues. Streetscaping around Thunderbird House and Central Park improvements were completed in 2024, while a range of projects are set to be completed in 2025, including renewal of Air Canada Park, public realm improvements around Market Lands, and the development of Odeon Park. The 2024 Adopted Budget allocated $237k to the Downtown Enhancement Program; $578k is planned for 2025 to 2029, which compares to $661k over the last five years. The 2024 allocation is intended to support the aforementioned Downtown Recovery projects. The Budget also allocated $200k to the Business Improvement Zones, Image Routes, and Neighbourhood Main Streets Program in 2024; $200k is planned for each of the next five years, which compares to an annual average of $106k over the last five years. The 2024 Budget is forecasting $5.6m in 2025 through 2027 for streetscaping around Portage Place, and $12.6m for initial design and construction of the Portage and Main opening.
Infrastructure	Transit improvements	The launch of the Primary Transit Network and Feeder Routes, one of the main components of the Winnipeg Transit Master Plan (WTMP), is scheduled for June 29, 2025. Implementation of the WTMP is a key transportation-related incentive to intensification. Towards this aim: - The final version of the new route network was approved by Council on June 27, 2024.

Tool	Initiative	Description
		- Two project managers have been hired to oversee the design and construction of approximately $20m in infrastructure for PTN implementation, with a focus on the critical items required for opening day. Construction of this infrastructure will continue into 2026 or 2027. - Schedules for the new network are currently being finalized. Marketing and communications outreach for the PTN will begin in earnest in early 2025. - $7m is planned over the next two years to produce a preliminary design and Class 3 cost estimate of Downtown rapid transit, including plans for Portage & Main and Union Station.
Infrastructure	Water main renewals	In 2023, 13.5 km of water mains were renewed in the intensification target area. Of this work, 13.4 km have been identified as improving fire flow in the water system, decreasing the likelihood that fire flow would be a constraint to intensification.
Planning	CentrePlan 2050 (Downtown Plan)	On September 26, 2024, Council adopted CentrePlan 2050 as a secondary plan by-law. CentrePlan 2050 is a long-term plan for the Downtown that will guide development and public investments to ensure a coordinated approach to revitalization, with the goal of getting more people living and visiting Downtown. Council will consider funding for short term priority actions related to the implementation of CentrePlan 2050 during the 2025 budget review process. This includes funding for a pilot project to bring programs and activities to Graham Avenue, starting in summer 2025 when buses come off the street. It also includes funding for detailed design and construction drawings for Graham Avenue. requests for funding for plan implementation during the 2025 budget review process. This includes funding for Graham Ave programming and reconstruction design.
Planning	Naawi-Oodena (Kapyong Barracks) secondary plan	On January 25, 2024, Council adopted the Naawi-Oodena secondary plan, which applies to the 51-acre portion of the Naawi-Ooodena lands owned by the Canada Lands Company. It is consistent with the Naawi-Oodena Master Plan, which provides a collective vision for the overall 160-acre Naawi-Oodena, including the balance owned by Treaty One First Nations.

Tool	Initiative	Description
Planning	North and South Point Douglas secondary plan	Work on a Point Douglas secondary plan is underway. Once complete, the 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.
Planning	Review and Assessment of Municipal Servicing for Water, Sewer, and Land Drainage Development (formerly Capacity Study)	The Water and Waste Department (WWD) is concluding a study to determine how other Canadian cities determine and communicate capacity constraints. This study will identify development application process improvements based on a review of existing processes and a scan of comparable jurisdictions. It is planned to be provided to Council in 2025.

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

9.2 Greenfield Development Opportunities and Constraints

The Greenfield Development Opportunities and Constraints table is included in the Appendix of CCDS 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 B1.5.2 (General Growth) of CCDS 2.0, 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 CCDS 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, 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?
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
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 draft *City of Winnipeg Transportation Master Plan 2050*, and additional anticipated growth-related needs. Answers were based on 2050 travel demand model and land use forecast data analysis.
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*
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.

Figure 9-2: 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:

- Project names and authorization years have been changed to align with the most recent City infrastructure planning and budget documents.
- Discussion around the Northwest Interceptor (wastewater) system has been introduced in anticipation of future City study in the near term. A reference to this has been added as potential growth-enabling infrastructure for Airport Area West Residential.
- In Precinct D, "Share of community/rec centre" was replaced by "Share of Northwest Winnipeg Regional Recreation & Aquatic Centre" in accordance with the City's current investment planning.

- In Precinct B, “Share of Northwest Winnipeg Regional Recreation & Aquatic Centre” was also added. However, an additional new recreation/community centre will also be needed based on levels of service prescribed in the Winnipeg Recreation Strategy.
- Land acquisition for regional recreation and aquatic centres in southeast and northwest Winnipeg were added in accordance with the City’s current investment planning.
- An outdoor aquatic park was added to Precinct B in accordance with Council’s levels of service prescribed by the Recreation Strategy.
- “Share of Marion underpass” was removed as growth-supportive infrastructure to Precinct K South and St Vital Perimeter South Sector, as this project is not contemplated in the draft Transportation Master Plan 2050.
- “Share of Plessis widening” and “Share of Dugald widening” were added as growth-supportive infrastructure to South Transcona based on the project’s inclusion in the draft Transportation Master Plan 2050 and travel demand modeling results.
- “Share of Route 90 improvements – Taylor to Ness” was removed as growth-supportive infrastructure to Waverley West B based on travel demand modeling results.
- “Share of Schreyer Parkway” was removed as growth-supportive infrastructure to South Transcona based on travel demand modeling results.

	Short-to-medium term			
	AA West Residential	**Waverley West B**	**Precinct K South**	**Remainder Precinct Q**
Quadrant	West	Southwest	Southeast	Southwest
Potential Units	4,010	2,990	1,680	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	• 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)
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
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 9-3: Updated Greenfield Development Opportunities and Constraints table, 2024

Short-to-medium term				Long term		
South Transcona	**Fort Whyte**	**Precinct D**	**Precinct B**	**Wilkes South sector**	**St. Vital Perim. South sector**	**St. Norbert sector**
Northeast	Southwest	Northwest	Northwest	Southwest	Southeast	Southwest
4,590	1,370	10,780	3,770	31,470	13,940	20,610
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	• 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
• 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
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.		

Where applicable, the recommended year of detailed design and authorization as per the 2024 Infrastructure Plan or more up-to-date investment planning information is indicated in parentheses next to infrastructure projects. Preliminary design funding may be required in advance of these dates.

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. While the Greenfield Opportunities & Constraints Table only considers community/rec centres and libraries, the Recreation Strategy prescribes levels of service for a wider range of facilities, ranging from indoor aquatic centres and arenas to spray pads. Future consideration will be given to the inclusion of additional amenities, relative to the intent of the chart.
Major roads	City-wide	The Public Works Department is currently reviewing its Transportation Master Plan. 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. Where applicable, these refer to the recommended year of detailed design and authorization as per the 2024 Infrastructure Plan, or where more up-to-date investment planning information is available. These dates will be reviewed with departments over time as part of the Public Service's ongoing prioritization of proposed capital projects.
Wastewater servicing	Fort Whyte, Waverley West B, southwest Winnipeg	The Southwest Interceptor is fully funded, with construction planned for 2025 to 2027. Until it is in place, development in these areas may be at risk. Developments will be reviewed on a case-by-case basis, with capacity allocated at the permit stage of approvals. The City's ability to accommodate growth in the interim will depend on the rate of development and growth to-date.

Topic	Implications for	Description
Wastewater servicing	Northwest Winnipeg (CentrePort South, Precincts D and B)	The Northwest Interceptor conveys wastewater from homes, businesses, and institutions in the growing northwest corner of the City to the North End Sewage Treatment Plant for treatment. It also receives wastewater from the RM of Rosser and will receive wastewater from Airport Area West (CentrePort South). Planning for future growth in this interceptor system is necessary to identify capacity requirements based on expected growth. The Water and Waste Department will be investigating evaluating required interceptor extensions and existing interceptor capacity in the northwest of the City in 2025/26. Full build-out in contributing growth areas may be limited in advance of implementation.
Wastewater servicing	South Transcona	The Northeast Interceptor assessment has identified the Dugald interceptor as a potential constraint to development and may require improvement, depending on the level of development proposed in the preparation of a secondary plan for the area. Analysis and design through the secondary plan process will demonstrate that development can either be accommodate, or it will 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	South Transcona, northeast Winnipeg	The Water and Waste Department is investigating the performance and anticipated increased demands on the Northeast Interceptor (wastewater) through flow monitoring and analysis.
Water and wastewater servicing	Airport Area West Residential & Industrial (CentrePort South)	Phase 1A regional water and wastewater detailed design is complete and construction tenders have been awarded. Substantial completion of the regional infrastructure is planned for Q3 2026. The scope and conceptual timing of future phases is described in the Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering Final Report (see Figures 9-5 and 9-6).

Figure 9-4: Items being monitored for future versions of this report

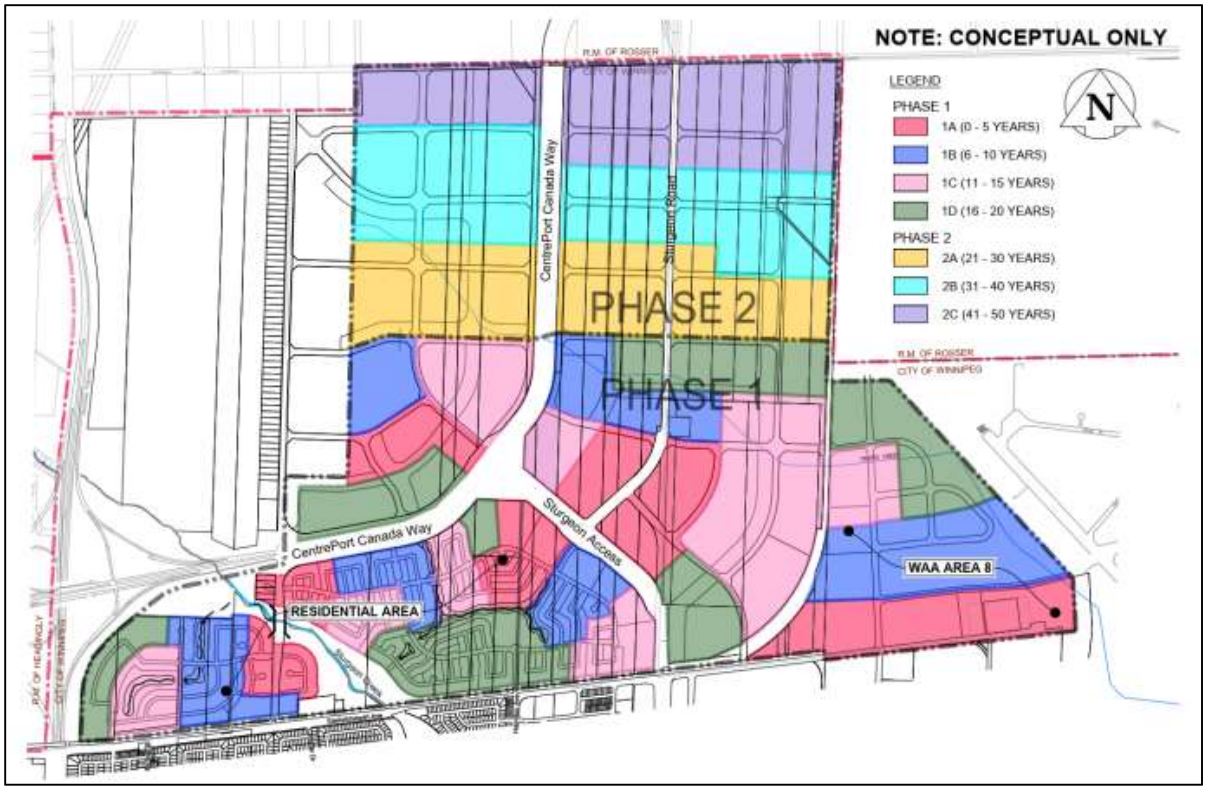

Figure 9-5: Servicing plan map, Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering – Final Report

Phase	Contract	Description	Total costs	% of total
Phase 1A (year 0)	1A 2A 3 4A	By-pass lift station 600mm force main Interceptor and intake sewers 750mm feeder main (Silver to OS3)	$56,592,871[1]	52%
Phase 1B (year 5)	1B 5	Lift station sub/superstructure and associated mechanical and electrical to support development for years 6-10 400m secondary supply main	$16,942,753	16%
Phase 1C (year 10)	1C 2B	Lift station mechanical upgrades to support development for years 11-50 750m force main	$22,063,642	20%
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)			$109,186,370	100%

Figure 9-6: Phases of funding associated with servicing plan map, Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering – Final Report

[1] Phase 1A contracts have been awarded; cost has been adjusted accordingly.

9.3 Forecasting Growth-Enabling Infrastructure and Plans

The chart below is intended to combine several pieces of this report. In considering the growth-enabling infrastructure projects identified in the Greenfield Development Opportunities & Constraints table in relation to CCDS 2.0 land supply targets and the estimated supplies in Section 6.0, the timing of needed infrastructure can be projected. In order to maintain a healthy land supply, the design and construction of identified projects should be funded as recommended below.

Recommended project timing reflects estimated timelines for project design and construction a minimum of three years in advance of land supply exhaustion, in accordance with CCDS land supply targets. Where project timing provides for an excess of serviced supply beyond the minimum three years, this is in alignment with *2024 Infrastructure Plan* recommendations. In these cases, residential growth-enabling projects are being driven in part by other reasons, such as CentrePort South servicing and a need for new industrial land. The chart indicates project timing in relation to the City's six-year Capital Budget and ten-year Infrastructure Plan, two critical investment planning tools. It is focused on projects needed to enable the development of lands identified as "Short-to-medium term" in CCDS 2.0 greenfield phasing policies; "Long term" land requirements and timing will be refined through future sector planning processes as well as a future review of greenfield phasing policies.

Recommended timing is estimated; this forecast should be reviewed annually to capture changing conditions. Over time, business cases will be developed and refined, project alternatives may be considered, and land supplies and estimated rates of absorption may change. Funding and resources will be needed to execute these projects, which may be constrained by regulatory obligations and the need to maintain existing levels of service. Investment planning and project design should be informed by land use assumptions.

City investment planning tools	INFRASTRUCTURE PLAN		
	SIX-YEAR CAPITAL BUDGET		

Project	1-6 years	7-10 years	11-20 years
NEWPCC Upgrades: Biosolids	Funding has been secured for detailed design and construction to occur in this time period.		
NEWPCC Upgrades: Nutrient Removal Facilities	Funding should be secured for detailed design and construction to occur in this time period.		
WEWPCC Facilities Plan	Funding is approved. Study is ongoing and will be completed in this time period.		
CentrePort South Water and Sewer	Funding is approved for Phase 1A detailed design and construction to occur in this time period.	Additional funding required for future phases. The servicing report conceptually recommends the following timelines after Phase 1A service: Phase 1B after five years, Phase 1C after 10, Phase 2 after 20, and Phase 3 after 30. This timing will be refined based on absorption of preceding phases.	
Southwest Interceptor	Funding is approved for detailed design and construction to occur in this time period.		
Warde Ave extension		Funding should be secured for detailed design to occur in this time period. Construction may occur in this time period.	
Chief Peguis Trail (Main to Brookside)	Funding should be secured for detailed design to occur late in this time period.	Funding should be secured for construction to occur in this time period.	
Northwest wastewater interceptor system extension		Funding would need to be requested for detailed design to occur late in this time period. A secondary plan should be prepared in advance of detailed design to inform the study's land use assumptions.	Funding would need to be secured for construction to occur in this time period.
Clement Parkway (Grant to Wilkes)			Funding should be secured for detailed design and construction to occur towards the middle of this time period.

Figure 9-7: Recommended timing of growth-enabling infrastructure from January 1, 2024

Similarly, the timing of growth-enabling secondary plans noted in the Greenfield Development Opportunities and Constraints table can be forecasted based on CCDS 2.0 policies. In order to meet Council's planned land supply target of 10 years, plans should be prepared and approved by Council as recommended[1] below. Similar to the infrastructure forecast above, this forecast should be reviewed annually to consider projected changes in land supply and absorption. The timing of plan delivery may also deviate from the dates to maximize work planning efficiency. However, in doing so, the City should refrain from undertaking these plans too far in advance to help manage competing demands for limited City-funded growth-enabling and -supportive infrastructure, planning resources, and City operating costs. On average, planning processes can be expected to take approximately two years.

As per Policy E2.5.1 (Rural and Agricultural) in CCDS 2.0, precinct planning in "Long term" lands shall not occur in advance of Council approval of a sector plan. Policy B1.4.8 (General Growth) recommends that sector plans should be initiated for at least the Wilkes South and St Vital Perimeter South sectors before or in concurrence with the next planned review of OurWinnipeg and CCDS, which must begin no later than 2027.

The Public Service will provide additional information regarding its local area planning program in its Local Area Planning Initiatives reports, which are provided to Standing Policy Committee on Property and Development annually.

Plan	Units[2]	Years supply	Year plan should be adopted by Council
Existing vacant planned	27,920	12 years	n/a
South Transcona	4,760	2 years	2026
Fort Whyte	1,430	0.5 years	2026
Precinct D	11,190	5 years	2029
Precinct B	3,910	2 years	2034

Figure 9-8: Recommended timing of outstanding growth-enabling secondary plans based on the Primary demand and Standard supply scenarios

[1] Recommendation is based on the Primary demand and Standard supply scenarios as described in Section 6.1 and Step Two of Section A.1.2 respectively elsewhere in this report.
[2] Figures rounded.

Appendix A: Methodology

A.1 Residential Methodology

A.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 included land supply targets and monitoring and reporting requirements. These policies are described in Section 3.2 of this report.

A.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.

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 A-1: Dwelling type definitions used in this report

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 are excluded from these figures. Secondary suites, as accessory not primary dwellings, are also captured separately.

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 single-detached, semi-detached, rowhouses, and apartment dwelling units 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, properties zoned “RMF-S” will build out as rowhouses, properties zoned “R2” will build out as semi-detached dwellings, and “R1” properties as single-detached dwellings, all of which would build out to the densities described in Figure A-2 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.

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 A-2: Density assumptions by dwelling type

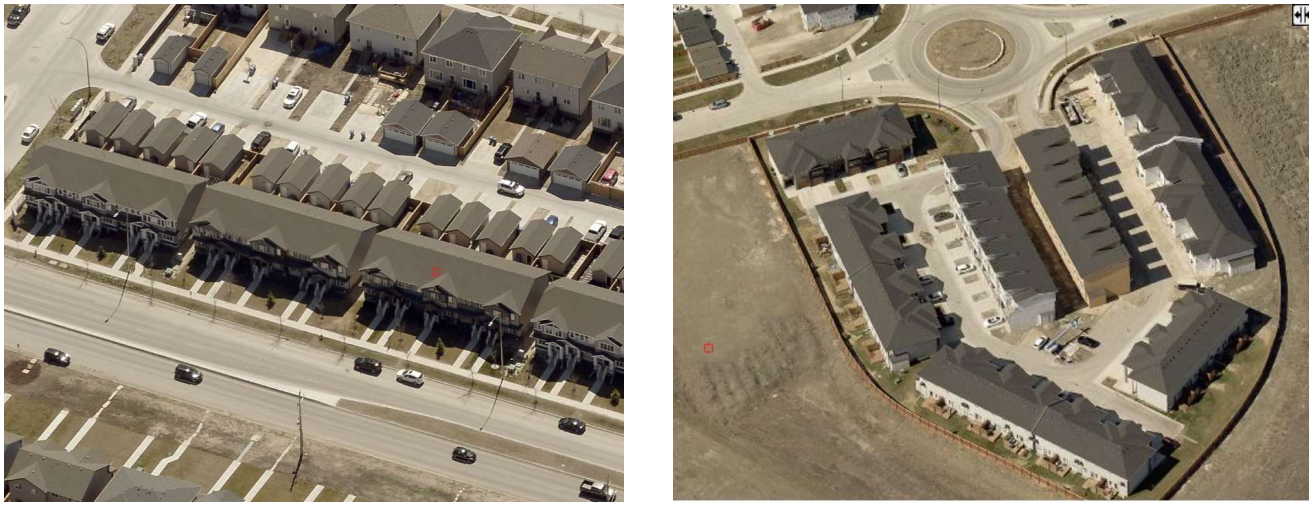

Figure A-3: Example of “block-oriented” (left) and “site-oriented” rowhouse sites

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 A-2.

Step 3: Update projected greenfield land demand

Section 6.1 of this report describes in detail the various scenarios that were used to assess potential greenfield demand. In sum, it considered three categories of forecasts: those derived from the *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area* prepared by the City's Office of Economic Research in Q1 2023, scenarios based on the continuation of existing five-year development trends, and mid-range scenarios splitting the difference between the two. Scenarios also contemplated varying intensification rates. Existing market uncertainty related to increasing interest rates was acknowledged in selecting preferred demand scenarios.

As described above, it is recommended that the "Five-year permit" scenario is used as the Primary demand scenario for planning purposes. It is reasonably conservative in that it errs slightly on the side of overestimating demand, which provides a greater buffer for infrastructure planning purposes. It assumes an intensification rate consistent with recent historical trends. Additional scenarios are considered to help communicate the impacts of more drastic demographic and/or market changes. Demand scenarios warrant regular monitoring against these potential changes.

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.

A.2 Non-Residential Methodology

A.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

[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.

fewer years, and refining its methodologies. Its non-residential monitoring activities trace back to the *2018 Employment and Commercial Lands Study* (ECLS) that was prepared 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.

A.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 A-5 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 A-5: Job type descriptions and examples

In order to better understand differences between these categories, Figure A-6 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 A-6: Job categories in relation to the NAICS 20 classification system

In estimating the number of jobs represented by non-residential construction, the following jobs per floorspace assumptions were used[1]:

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 A-7: Jobs per floor area assumptions

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

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 ECLS.

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. Vacant sites that are integrated into the operations of adjacent parcels are removed from the inventory; evidence of integration may include accessory uses such as vehicular parking, outdoor storage, or employee amenity spaces, as well as fencing inclusive of multiple properties. Common property ownership may also be used to gauge this.

From there, parcel zoning and their servicing status as either estimated locally serviced or unserviced is reviewed. In accordance with the 2018 ECLS, locally serviced land refers to, "lands that are developed or available for development, and are either serviced with full municipal services, or those local or regional services are located immediately adjacent"[1]. This category is intended to capture "shovel-ready" lands. Locally unserviced lands refers to, "lands that are developed or available for development that do not have municipal services present, have partial services, or do not have municipal services immediately adjacent, and require a service extension of at least 50 to 100 meters in length". This category excludes lands that require developer-funded service extensions. Locally unserviced lands may be serviced at a regional level. As per the City's Development Agreement Parameters, local services are typically the responsibility of the developer, while regional services are typically the responsibility of the City.

From here, each parcel in the inventory is analyzed against the list of potential encumbrances in Figure A-8 below that may limit their developability. Sites without any noted encumbrances are recognized as "unencumbered" in the industrial supply summary. While the 2018 ECLS addressed this issue of undesirability by discounting 15% of the City's supply, it was felt that this approach was more accurate.

[1] Pg. 6-3.

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 occupied by an open or closed landfill, or within a landfill control zone

Figure A-8: Potential industrial land supply encumbrances

Additional analysis is undertaken to quantify the potential to intensify underdeveloped sites. First, all occupied industrial-zoned properties are screened to identify potentially developable unoccupied portions. Polygons are traced over the remaining developable portions of these sites, whose total areas comprise this category of supply, less any portions that may be located within a landfill control zone[1]. These portions must be:

- A minimum of one acre in area;
- Entirely unused (i.e. they are not being used for accessory uses such as parking or outdoor storage); and
- Of a developable configuration with a reasonable means of access connecting the portion with potential for intensification to a public or private street. This may include an internal drive aisle to the rear of a property (i.e. portion does not need frontage), but cannot require demolition of an existing building where obstructed.

Sites identified as vacant supply, or portions thereof, cannot be identified for potential intensification.

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 future sites, which are designated for future Employment Land development but do not have existing industrial zoning.

Step 3: Review industrial demand

Forecasted employment land demand is derived from the Winnipeg Metropolitan Region's *Long-Range Residential & Employment Land Forecasts* (2021), which was prepared as a background study to its regional Plan 20-50. It projected the City of Winnipeg to

[1] As per the City's Standards and Guidelines for the Mitigation of Methane Gas at Building and Utilities and Guidelines for Construction on Landfill Sites, while development is not precluded in landfill control zones, higher building and development standards may render development uneconomical.

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 2018 ECLS, this study considers three components of commercial land supply: vacant commercial-zoned land, land located in Regional Mixed Use (RMU) 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 RMU 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 RMU Centres designated in CCDS 2.0 to quantify all approved but non-vested commercial land, as well as opportunities for the continued build-out of occupied 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 2018 ECLS. 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 2018 ECLS, 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 2018 ECLS. Assumptions regarding the share of e-commerce sales as percent of total expenditures are described below.

	2016	2021	2026	2031	2036	2041
Non-food-oriented retail	1.4	1.9	2.4	2.9	3.4	3.9
Food-oriented retail	0.2	0.5	0.7	1	1.2	1.5

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

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.