Winnipeg

2025 Complete Communities Land Monitoring Report



Photo: Kyle Thomas Creative

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1. Executive Summary

The *2025 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, 2025.

The City continues to meet its 50% residential intensification target. In 2024, 53% of all permits issued for the construction of new dwelling units were located in the intensification target area, while the last five years has seen an annual average of 55%. This rate is expected to moderate slightly over the long term. Conversely, the City has fallen short of its Downtown intensification target of 350 dwelling units per year in each of the last three years, having issued permits for 258 units in 2024. Downtown development agency CentreVenture predominantly attributes this to a lesser availability of development incentives, along with the consequences of higher construction costs and socio-economic issues being more acutely felt Downtown. These rates are expected to rebound in the near term, as there are approximately 2,500 dwelling units in the Downtown "pipeline", buoyed by Housing Accelerator Fund capital grants and tax increment financing grants via the Affordable Housing Now program. This includes a number of projects at Railside at The Forks, Phase 2 of the Market Lands development, Wehwehneh Bahgahkinahgohn (former Hudson's Bay building), and the redevelopment of Portage Place.

The City continues to maintain a healthy supply of greenfield land, with supplies exceeding CCDS 2.0 targets. The City has an estimated 13.5 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 are very similar to those in last year's report, where absorption has been offset by gains in supply where sites were rezoned for residential development where they otherwise had not been designated, or subdivisions were approved at densities higher than originally forecasted.

However, to maintain this healthy supply, Council will need to decide how it funds the next unserviced site by 2027. According to its existing phasing policies, the Warde Ave extension, needed to enable the south half of Precinct K, should be funded by 2028 to be in place by 2033. However, wastewater treatment capacity may not be sufficient to enable full build out of Precinct K at that time, as the South End Sewage Treatment Plan (SEWPCC) is expected to reach capacity in the early 2030s. The Water and Waste Department will be reviewing remaining available capacity beginning in 2026, including identifying any constraints to development and options to mitigate them.

Alternatively, the City could prioritize the next greenfield priority, Precinct D, by funding the Chief Peguis Trail extension by 2027 to be in place by 2033. But without at least one of these projects in place by this time, it is forecasted that Council would fall short of its serviced land supply targets. Furthermore, these projects are only a portion of the City's $8 billion infrastructure deficit and will need to be prioritized against other projects needed for other reasons. In the face of these demands, Council may be challenged to meet its serviced land supply targets. Additionally, failing

to bring lands online in the southeast would result in shortages in the quadrant and would likely be misaligned with industry expectations.

This report identifies 276 acres of unencumbered, shovel-ready vacant industrial land in the City of Winnipeg, which translates into 4.9 years of supply. This figure may overstate the City's ability to accommodate investment. Industrial land supply continues to be constrained and relatively stagnant, with little change year-over-year. Much of this supply may not be desirable, or available, to many potential users. To an extent, this is expected to change following the installation of the first phase of regional water and wastewater services in CentrePort South, which is expected to be complete in 2026. In the long term, future supply is geographically imbalanced. Future planning processes should endeavour to expand opportunities for industrial development across the City to meet user demand for specific quadrants.

This report also identifies 542 acres of vacant commercial land in the City of Winnipeg, representing 25 years of supply, affirming the continued persistence of an oversupply of commercial land first identified in the *2018 Employment and Commercial Lands Study*. This report noted 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". It is also likely to result in requests to rezone commercial land for other uses. The City's commercial land supply has been fairly static in recent years, with modest rates of absorption combined with limited new commercial rezonings.

2. Introduction

The *2025 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 annual report.

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 2025 Population Projections for the City of Winnipeg and the Winnipeg Census Metropolitan Area (CMA), which was released in June 2025. Its baseline scenario forecasts the City of Winnipeg to reach a population of 1,002,700 people by 2049, during which it can be

expected to accommodate approximately 101,000 new dwelling units. Additional demand forecasts 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*. These were used as the most recent available forecasts.

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, including the Urban Development Institute of 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 some minor 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 Residential Development Activity

4.1 Intensification Target

In 2024, 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 4-3 below. For each of the last five years, the City has exceeded CCDS's 50% target. This contrasts with earlier historical trends where, prior to 2018, the City had only exceeded 50% intensification once between 2011 and 2017. This level of intensification continues to be driven by higher rates of infill multifamily development.

Year	%
2020	53.6
2021	61.2
2022	52.6
2023	53.2
2024	52.5
Avg	54.6

Figure 4-1: Percent of new residential dwelling units located in the intensification target area, by year

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	5 yr avg
Greenfield	53.0	53.1	66.9	42.6	36.9	46.8	40.3	47.7	46.8	47.5	45.4
Intensification	46.9	46.6	32.9	57.2	63.0	52.9	59.6	52.2	53.2	52.5	54.6

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 4-2: Percent of new residential dwelling units as greenfield and intensification, 2015-24

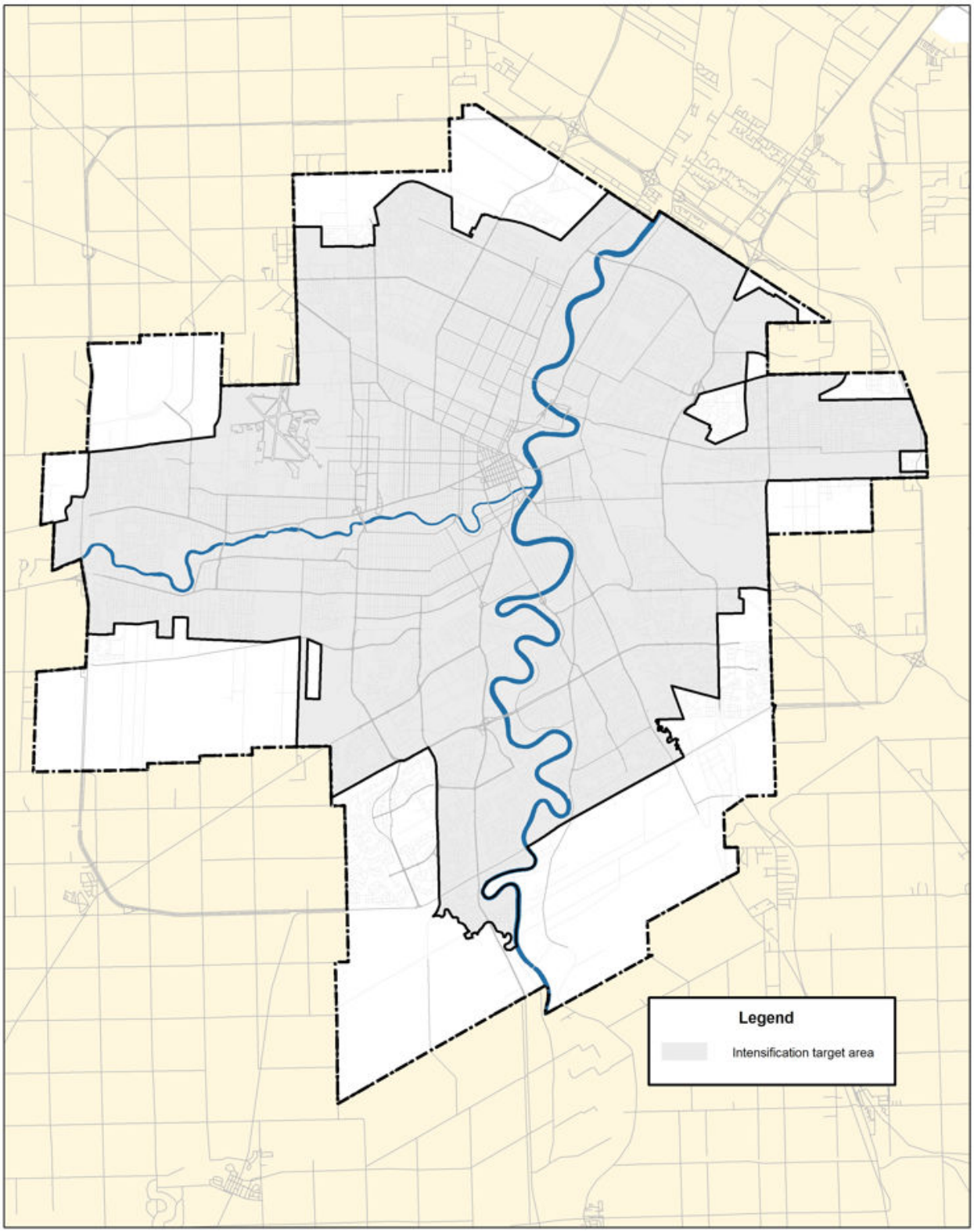


Figure 4-3: Intensification target area

The City's *2025 Population Projections for the City of Winnipeg and Census Metropolitan Area*, released by the Office of Economic Research in June 2025 and include housing start projections, produces a Low, Baseline, and High housing start forecast, dividing dwelling units into single and multifamily dwellings. Assuming the forecasted multifamily dwelling units are divided into more specific dwelling type categories (as defined in Section 4.3) 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 4-18), an intensification rate forecast can be produced. As illustrated in Figure 4-4 below, the City's 2025 housing forecast would expect intensification rates to decrease slightly over time, with only the High scenario remaining above the 50% intensification target through the 2049 time horizon. Over the long term, population growth is expected to moderate, with singles remaining constant and multis declining from all-time highs.

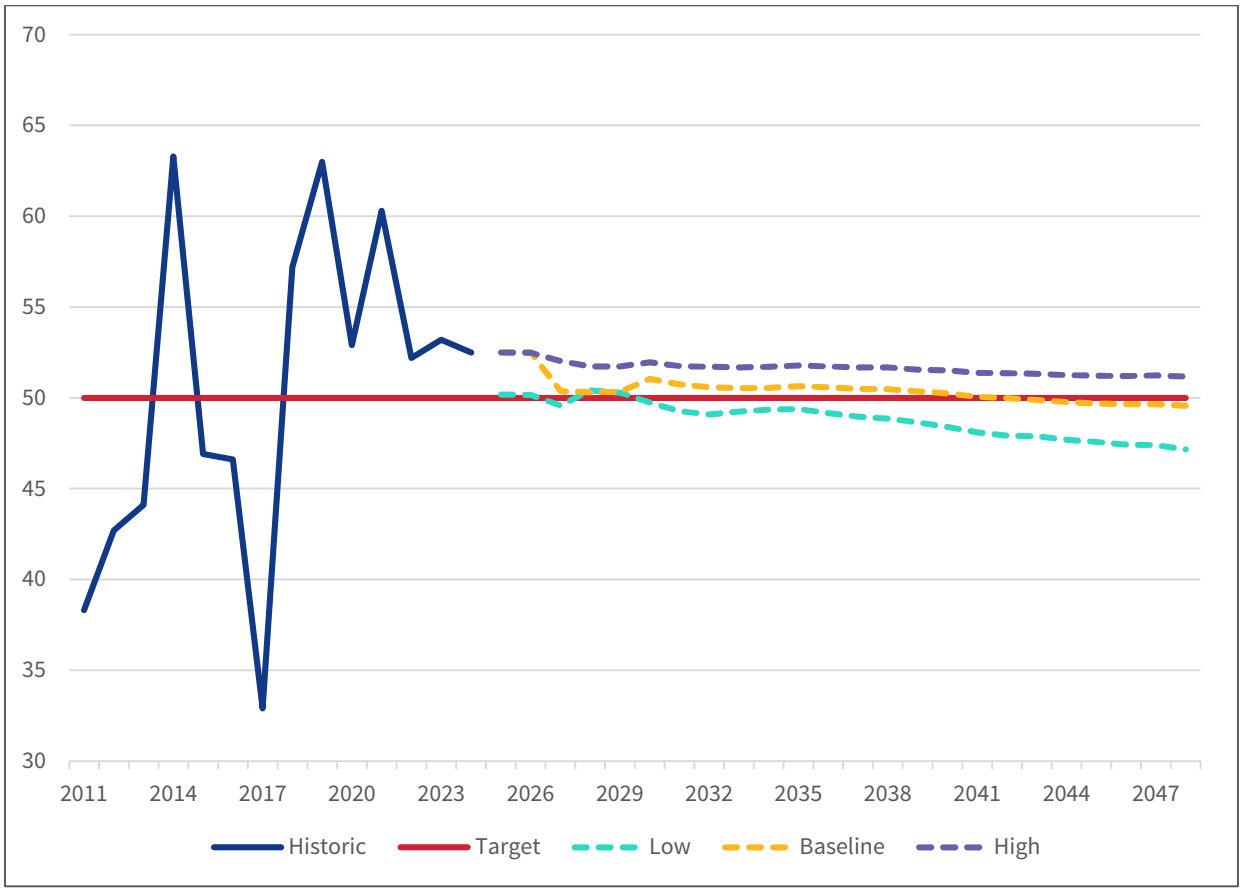


Figure 4-4: Forecasted intensification rate to 2049 based on 2025 City of Winnipeg Population, Housing, and Employment Projections

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. The chart below illustrates rates of Downtown residential development relative to the intensification target that came into effect in 2021. The City has averaged 315 new units per year, and has fallen short of its Downtown target in each of the last three years.

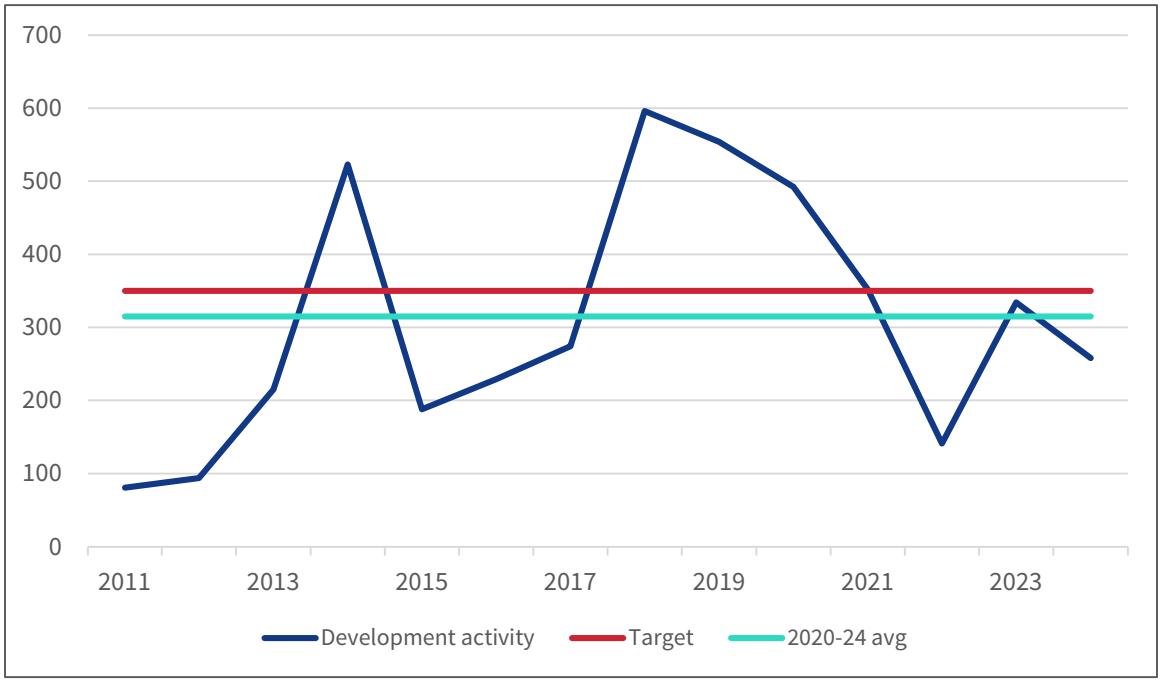


Figure 4-5: Permits issued for new residential units Downtown, 2011-24

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	5 yr avg
Downtown	188	229	274	596	554	492	352	141	334	258	315

Figure 4-6: Permits issued for new residential units Downtown, 2015-24

Downtown development agency CentreVenture attributes lower rates of development to a few factors:

- Since the COVID-19 pandemic, developers have struggled with rising construction costs. This has been acutely felt Downtown, where development projects are often faced with higher costs and exacerbated by a desire to ensure units are affordable for young people. High-rise construction is generally more expensive than other forms of lower rise multifamily housing, while there are frequent challenges related to site redevelopment such as land assembly, demolition of existing structures, and environmental remediation. Downtown development also sees additional costs associated with construction in a dense urban environment, including right-of-way rentals, limited material staging space, parking meter hooding, increased site security, and parking for trade workers. Requirements for main floor commercial spaces adds risk and complexity, while higher design standards often result in premium costs.
- The pandemic slowed some of the momentum that had been building over the last 20 years, having disproportionately affected the livelihoods of Downtown businesses as well as Winnipeggers facing poverty and systemic barriers, many of whom reside Downtown. These struggles have slowed demand for Downtown living.

- Perhaps most significantly, this downturn has coincided with lesser available development incentives. Higher rates up until the early 2020s can be attributed in large part to the Downtown Residential Development Grant and the Live Downtown Rental Development Grant programs, launched in 2010 and 2014 respectively. These programs are now completed. Some recent developments have received tax increment financing grants from the Province (via the Manitoba Works Capital Incentive) and the City (Heritage and Economic Development Incentive), though these programs have not been as heavily subscribed as previous programs. CentreVenture stresses the importance of incentive programs for robust rates of Downtown development.

Notwithstanding lower development activity over the last several years, higher figures are expected in the next few years. A review of development applications and permits received, as well as properties receiving Housing Accelerator Fund capital grants and tax increment financing grants via the Affordable Housing Now program, found that there are approximately 2,500 dwelling units in the Downtown "pipeline" that should appear as permits issued over the next several years. This includes a number of projects such as; Railside at The Forks, Phase 2 of the Market Lands development, Wehwehneh Bahgahkinahgohn (former Hudson's Bay building), and the redevelopment of Portage Place.

4.2 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 4-11). 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.

	2020	2021	2022	2023	2024	Avg.
CITY TOTAL	4,310	6,473	4,168	5,163	4,620	4,947
Greenfield development	**2,017**	**2,606**	**1,989**	**2,415**	**2,192**	**2,244**
Emerging Communities	2,017	2,606	1,989	2,415	2,192	2,244
New Communities	0	0	0	0	0	0
Intensification	**2,282**	**3,860**	**2,174**	**2,745**	**2,426**	**2,697**
Downtown	492	352	141	334	258	315
Major Redevelopment Sites	452	793	394	416	248	461
Corridor frontage	30	698	405	200	507	368
Urban Corridors	30	293	142	200	280	189
Regional Corridors	0	405	263	0	227	179
Established Neighbourhoods	1,308	2,017	1,234	1,795	1,413	1,553
Mature Communities	776	816	636	759	562	710
Recent Communities	532	1,201	598	1,036	851	844
Rural Agricultural	**11**	**7**	**5**	**3**	**2**	**6**

Figure 4-7: Permits issued for the construction of new residential dwelling units, sorted by Complete Communities 2.0 Urban Structure

	2020	2021	2022	2023	2024	Avg.
Greenfield development	**46.8**	**40.3**	**47.7**	**46.8**	**47.5**	**45.8**
Emerging Communities	46.8	40.3	47.7	46.8	47.5	45.8
New Communities	0	0	0	0	0	0
Intensification	**52.9**	**59.6**	**52.2**	**53.2**	**52.5**	**54.1**
Downtown	11.4	5.4	3.4	6.5	5.6	6.5
Major Redevelopment Sites	10.5	12.3	9.5	8.1	5.4	9.1
Corridor frontage	0.7	10.8	9.7	3.9	11.0	7.2
Urban Corridors	0.7	4.5	3.4	3.9	6.1	3.7
Regional Corridors	0.0	6.3	6.3	0.0	4.9	3.5
Established Neighbourhoods	30.3	31.2	29.6	34.8	30.6	31.3
Mature Communities	18.0	12.6	15.3	14.7	12.2	14.5
Recent Communities	12.3	18.6	14.3	20.1	18.4	16.7
Rural Agricultural	**0.3**	**0.1**	**0.1**	**0.1**	**0.0**	**0.1**

Figure 4-8: Share of permits issued for the construction of new residential dwelling units, sorted by Complete Communities 2.0 Urban Structure

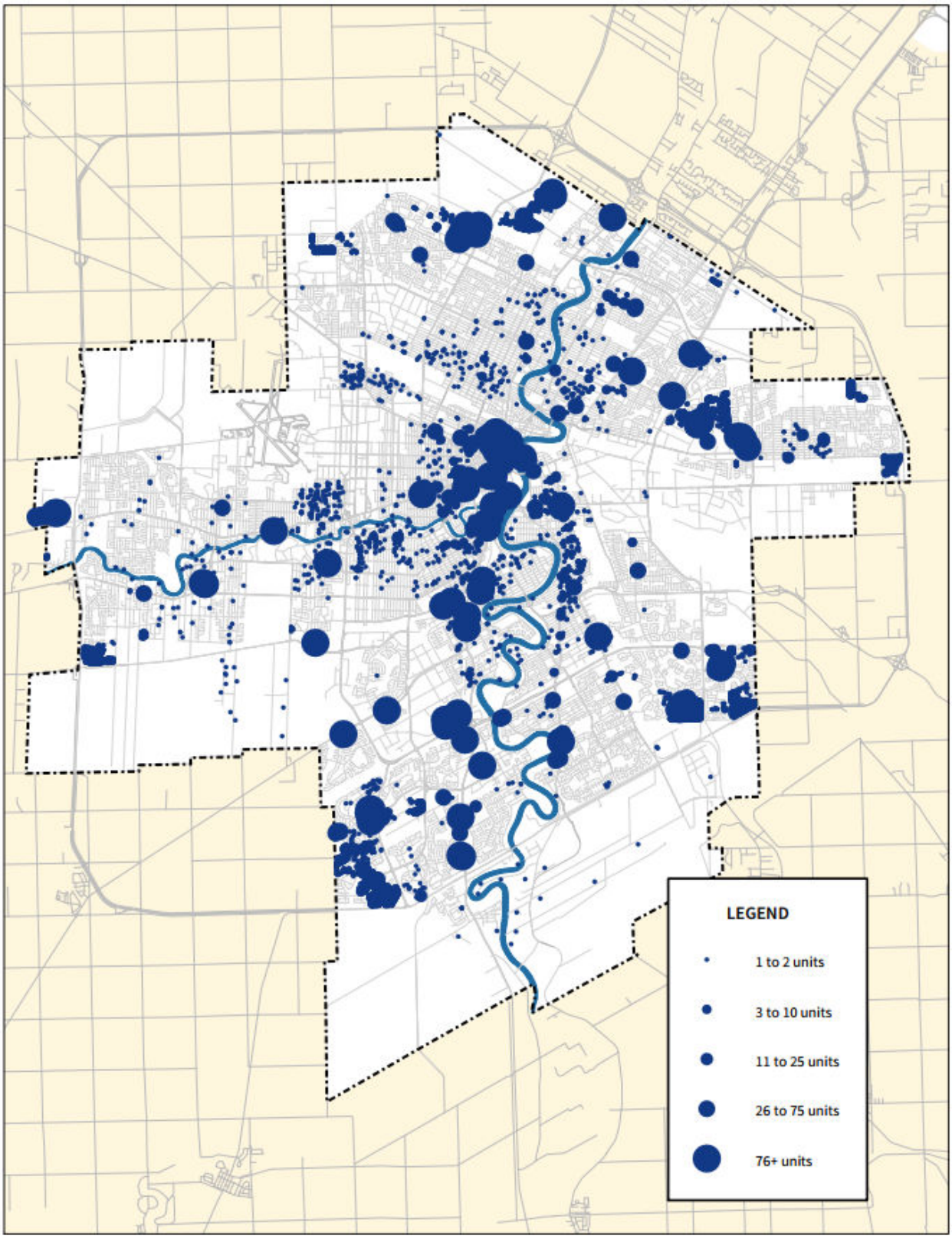


Figure 4-9: Permits issued for the construction of new residential dwelling units, 2020-24

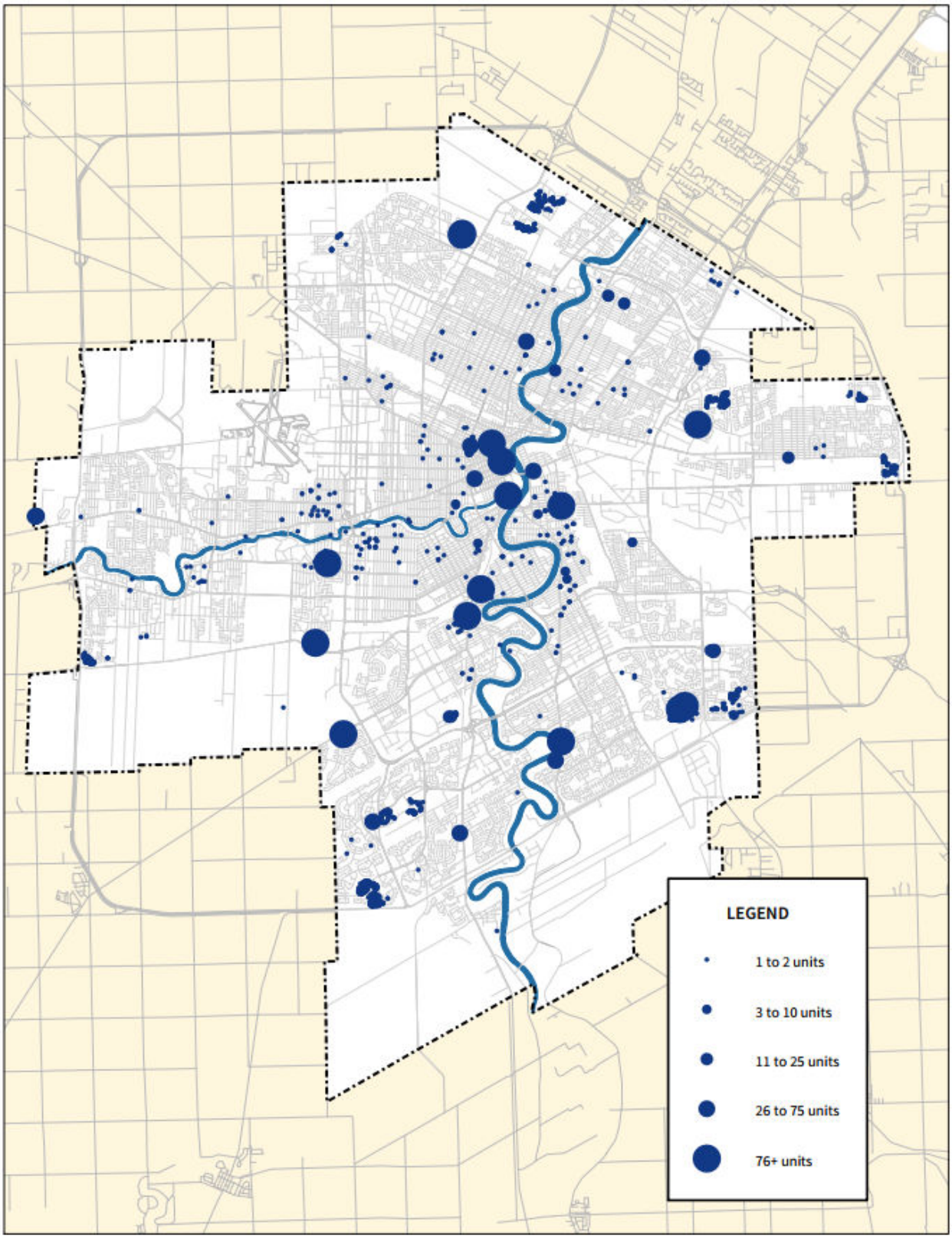


Figure 4-10: Permits issued for the construction of new residential dwelling units, 2024

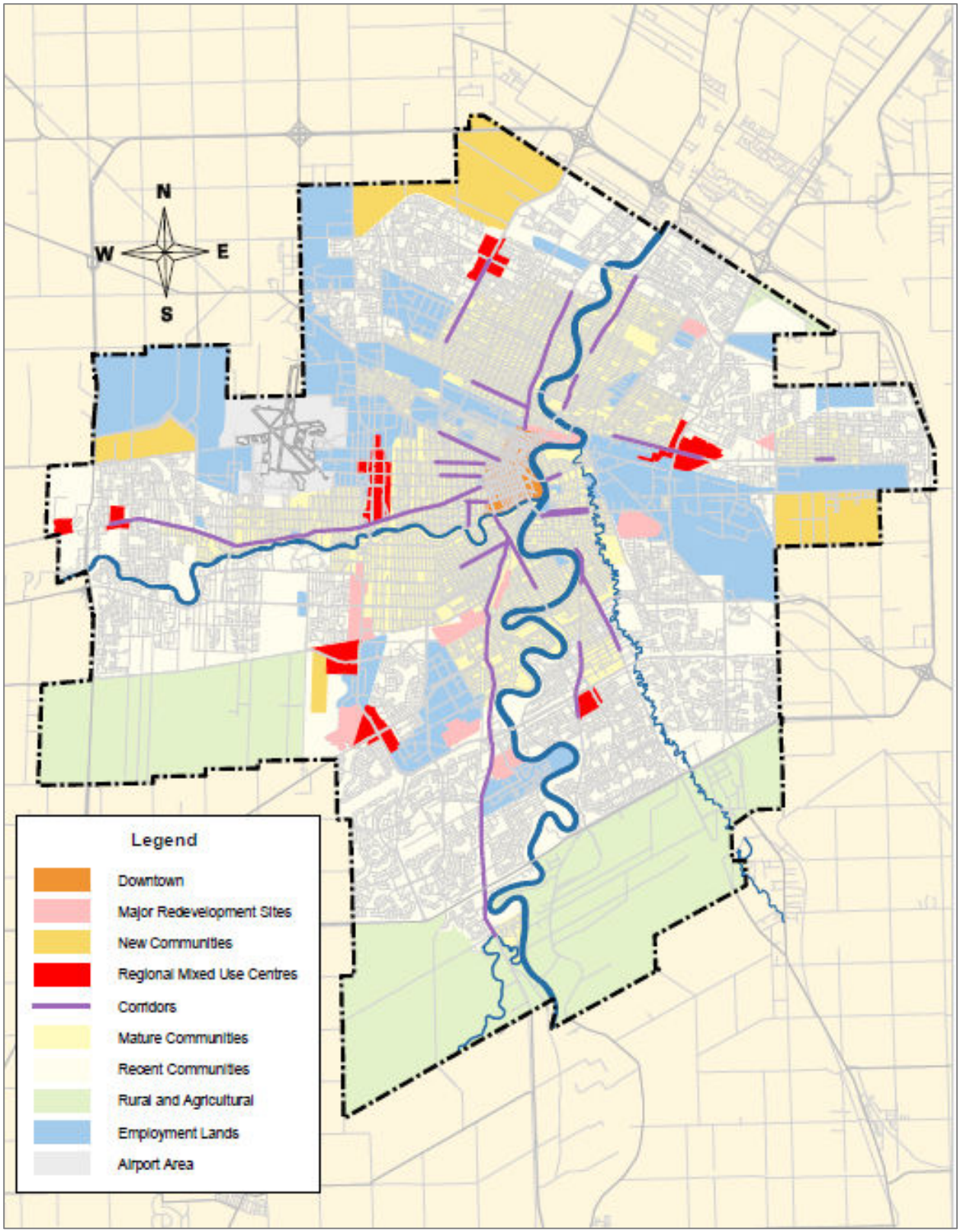


Figure 4-11: Complete Communities 2.0 Urban Structure

4.3 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 4-12: 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 2020 to 2024, 24% of all dwelling units were singles, while 4% were semis, 6% were rows, and 65% were apartments.

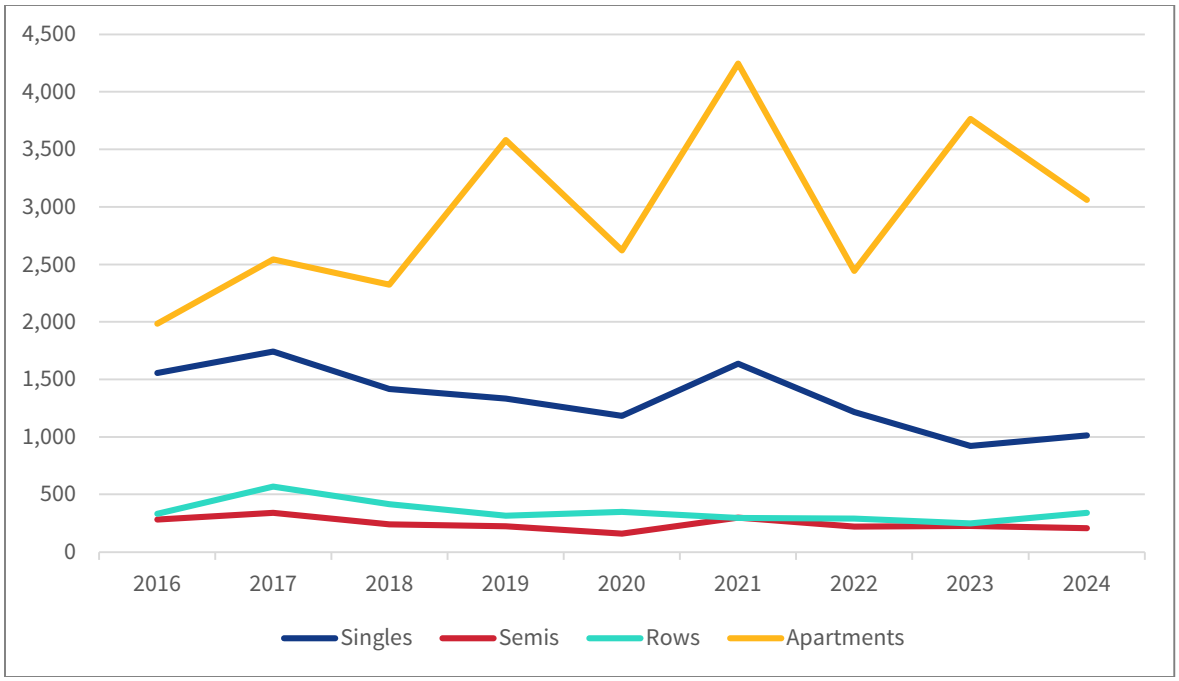


Figure 4-13: New residential units by dwelling type, by year

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
2024	1,014	22	206	4	340	7	3,060	66
2020-24 total	5,969	24	1,107	4	1,521	6	16,137	65

Figure 4-14: Development activity by dwelling type, 2016-24

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.

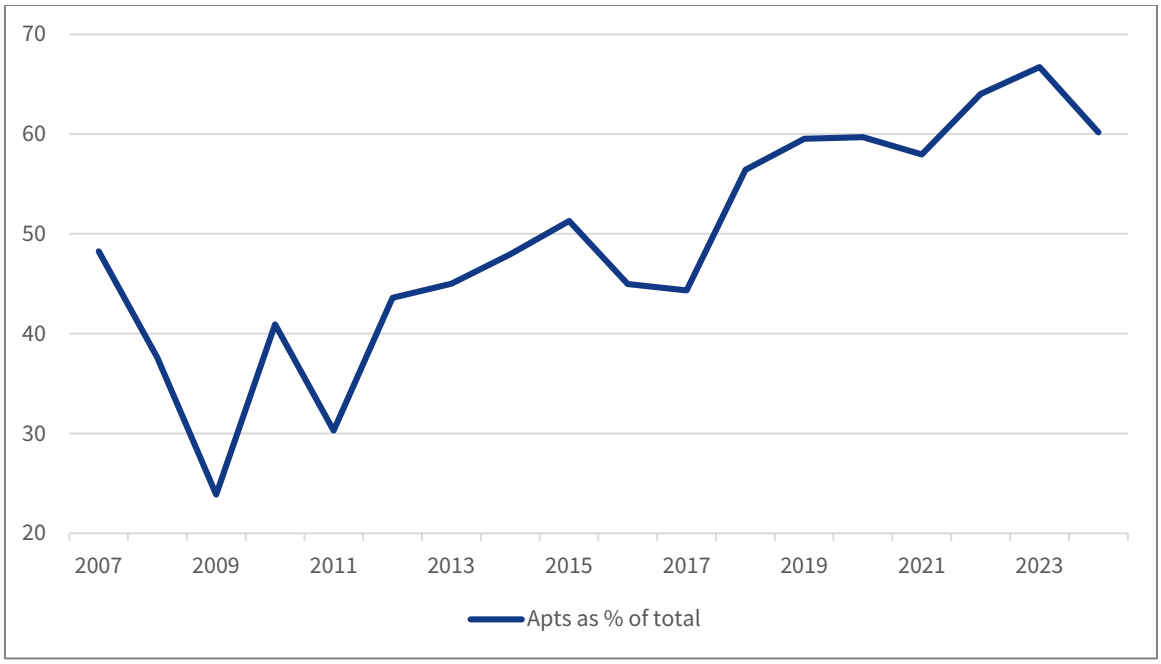


Figure 4-15: Apartments as percentage of annual total housing starts, 2007-2024 (source: CMHC Housing Market Information Portal)

Over the long-term, this trend has accelerated. The last two years have seen fewer than 1,000 single-detached dwelling starts. 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. Similarly, 2024 saw 957 single-detached starts against 4,445 total starts.

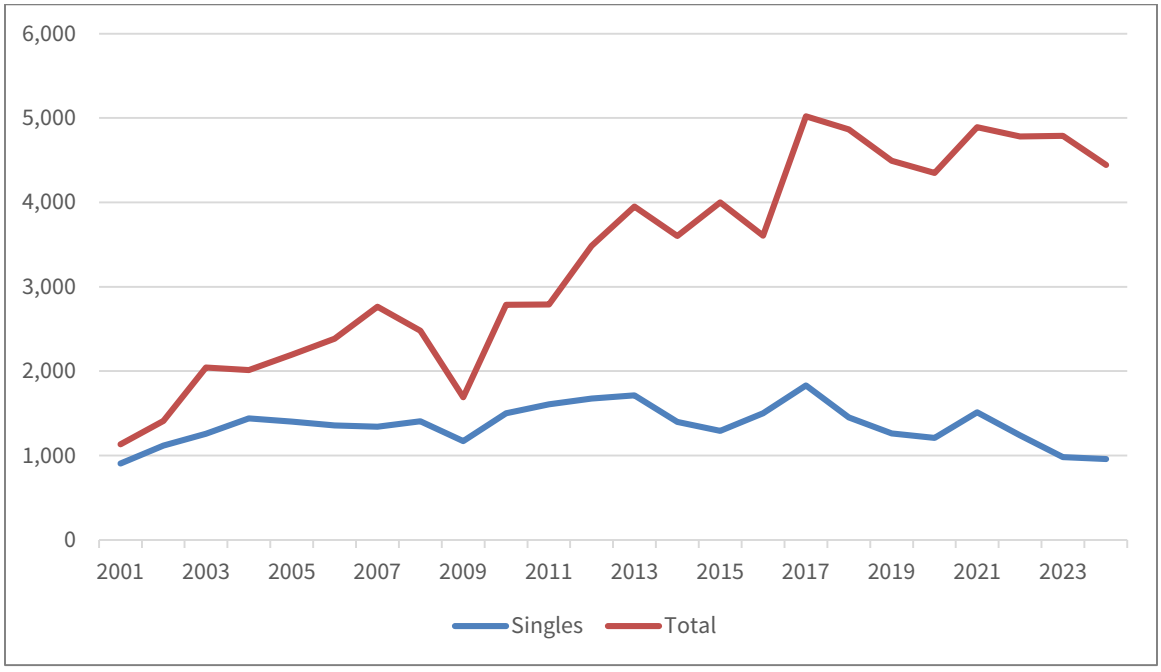


Figure 4-16: Housing starts, single-detached and total dwellings, 2001-2024 (source: CMHC Housing Market Information Portal)

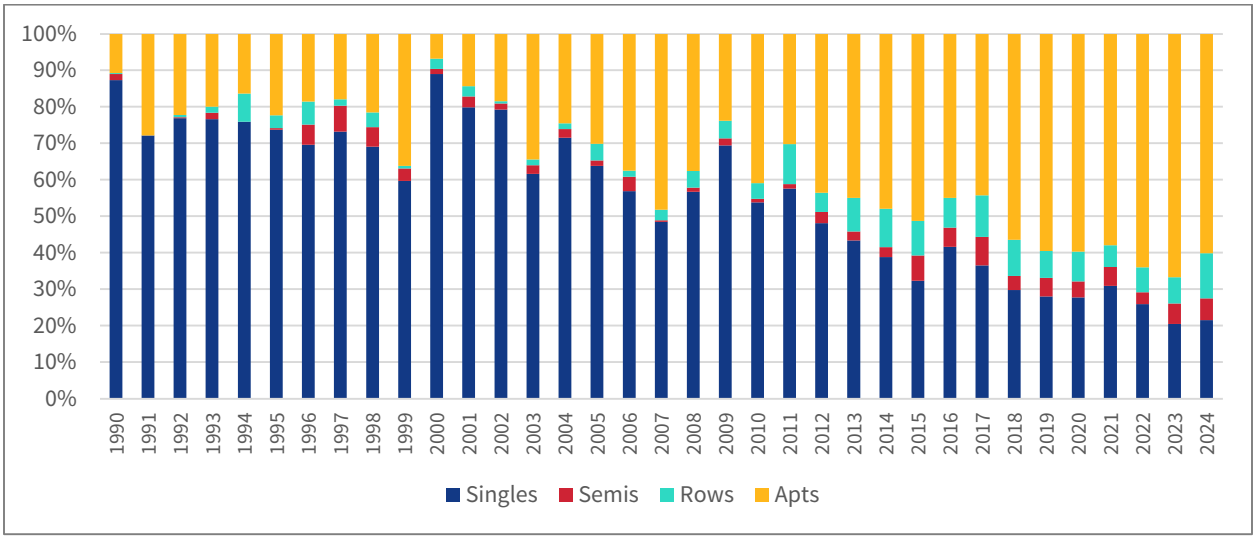


Figure 4-17: Housing starts, all dwelling types, 1990-2024 (source: CMHC Housing Market Information Portal)

The chart below indicates the share, in percentage, of all dwelling units located in intensification and greenfield areas. For example, in 2024, 23% of all new single family detached units were in intensification areas, compared to 69% of all apartments. 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
2024	Intensification	23	4	19	69
	Greenfield	77	96	81	31
2020-24 total	Intensification	23	10	26	72
	Greenfield	77	90	74	28

Figure 4-18: Share of all dwelling units (%) located in intensification and greenfield areas

4.4 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	2024
400m of RT station	57	132	355	359	408	145	750	256
400m of Primary Transit Network	3,225	2,943	4,228	2,730	4,211	2,590	3,660	2,827

Figure 4-19: Permits issued for the construction of new residential dwelling units in proximity to TOD areas

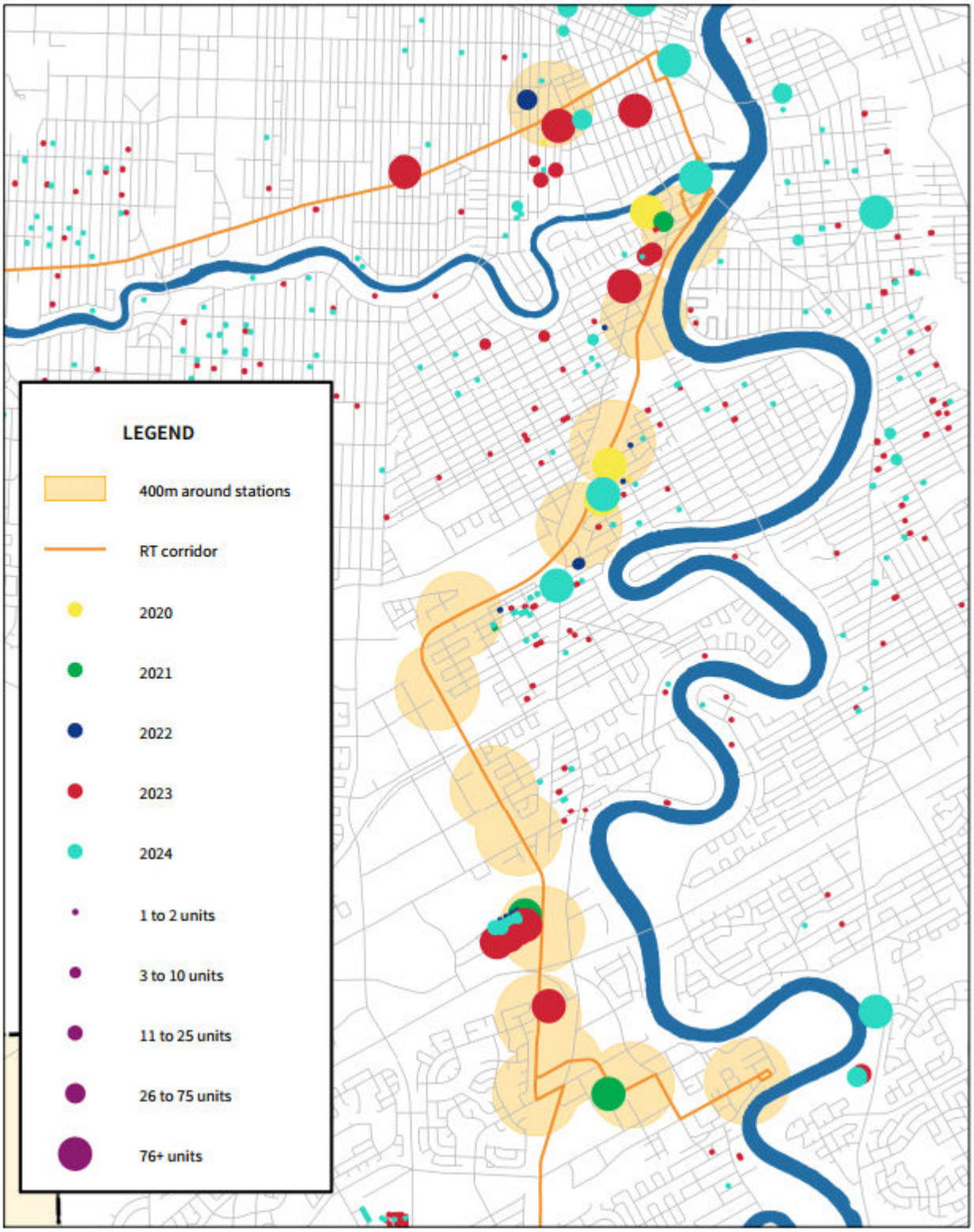


Figure 4-20: Permits issued for the construction of new residential dwelling units in proximity to rapid transit stations, 2020-24

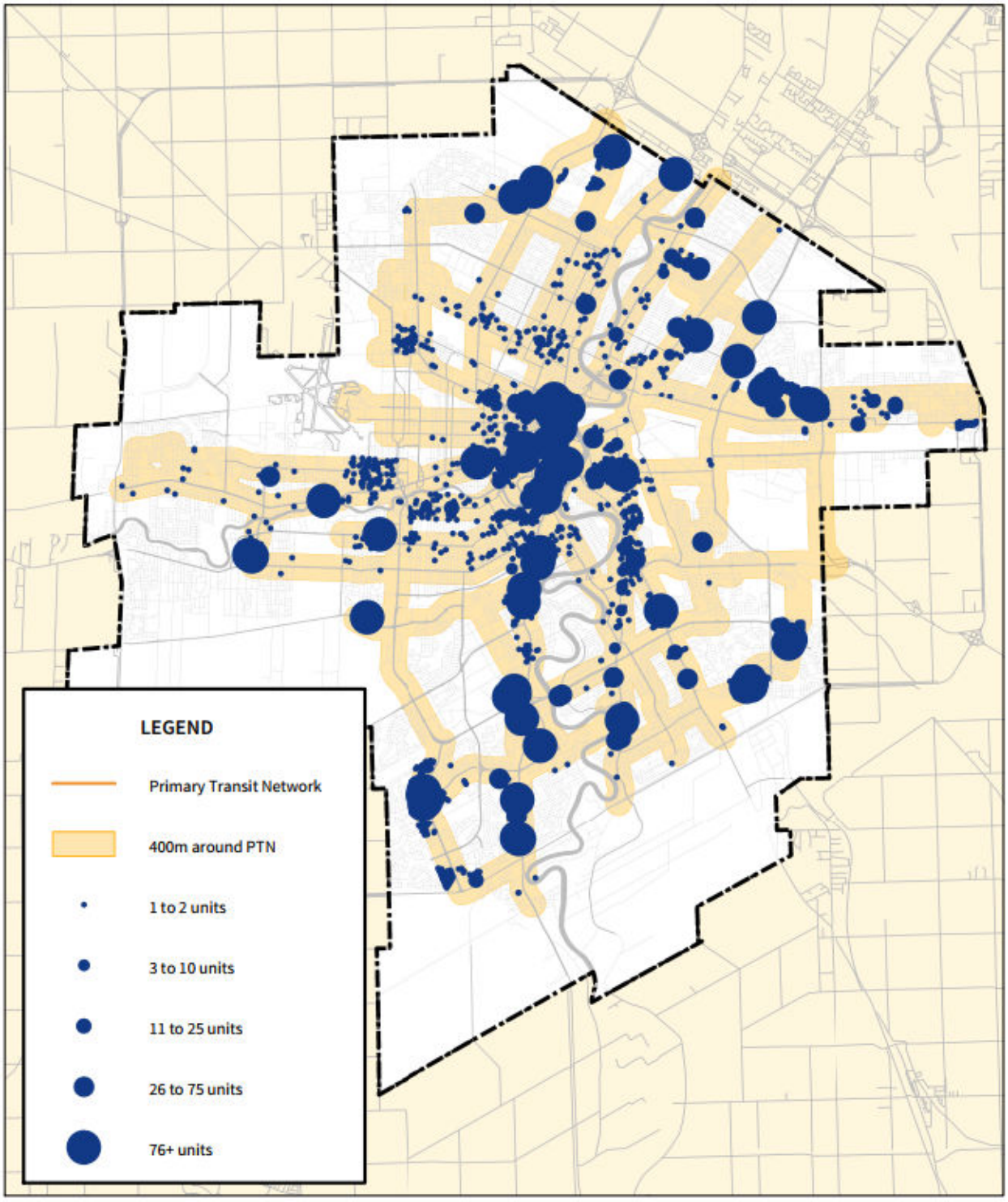


Figure 4-21: Permits issued for the construction of new residential dwelling units in proximity to the planned long-term Primary Transit Network, 2020-24

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%	4%	95%
400m of Primary Transit Network	14%	2%	5%	79%

Figure 4-22: Permits issued for the construction of new residential dwelling units, in TOD areas, 2020-24, by dwelling type share

4.5 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 2020 to 2024, 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 425 total dwelling units.

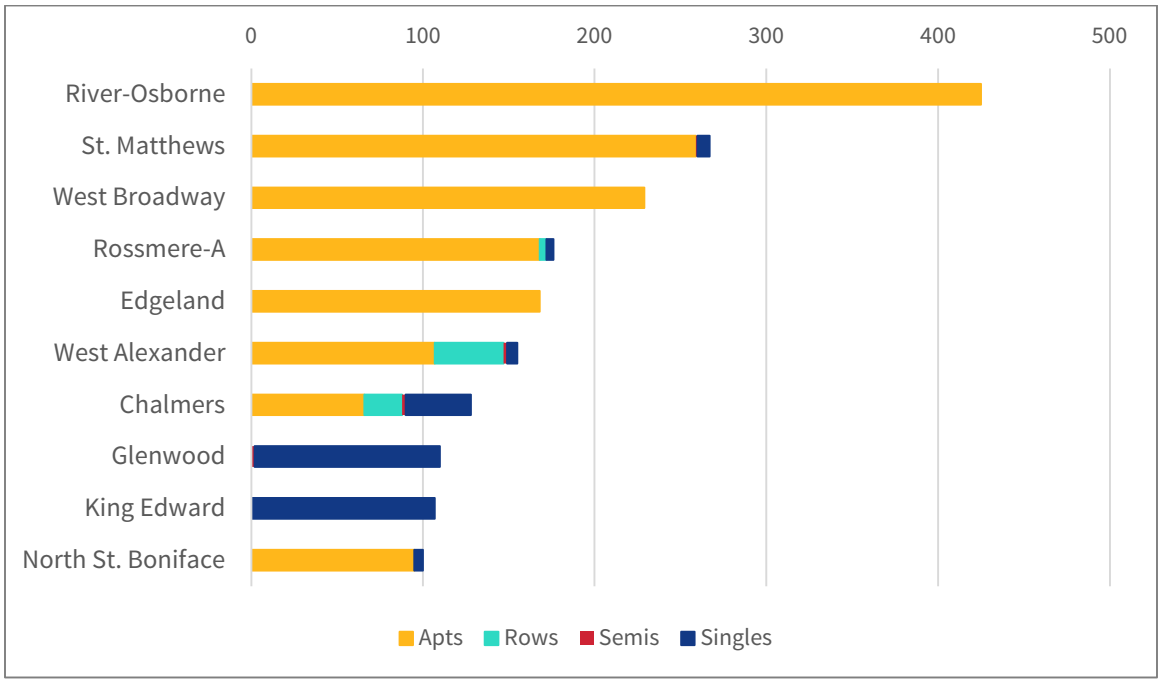


Figure 4-23: Top ten Mature Communities neighbourhoods by new dwelling units, 2020-24

Between 2020 and 2024, 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	108
King Edward	107
Brooklands	56
Beaumont	55
Sir John Franklin	52
North River Heights	46
Chalmers	38
Maybank	38
Lord Roberts	33
Burrows Central	31

Figure 4-24: Top ten Mature Communities neighbourhoods by new single-detached units, 2020-24

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 Leila North with 388, and River Park South with 344.

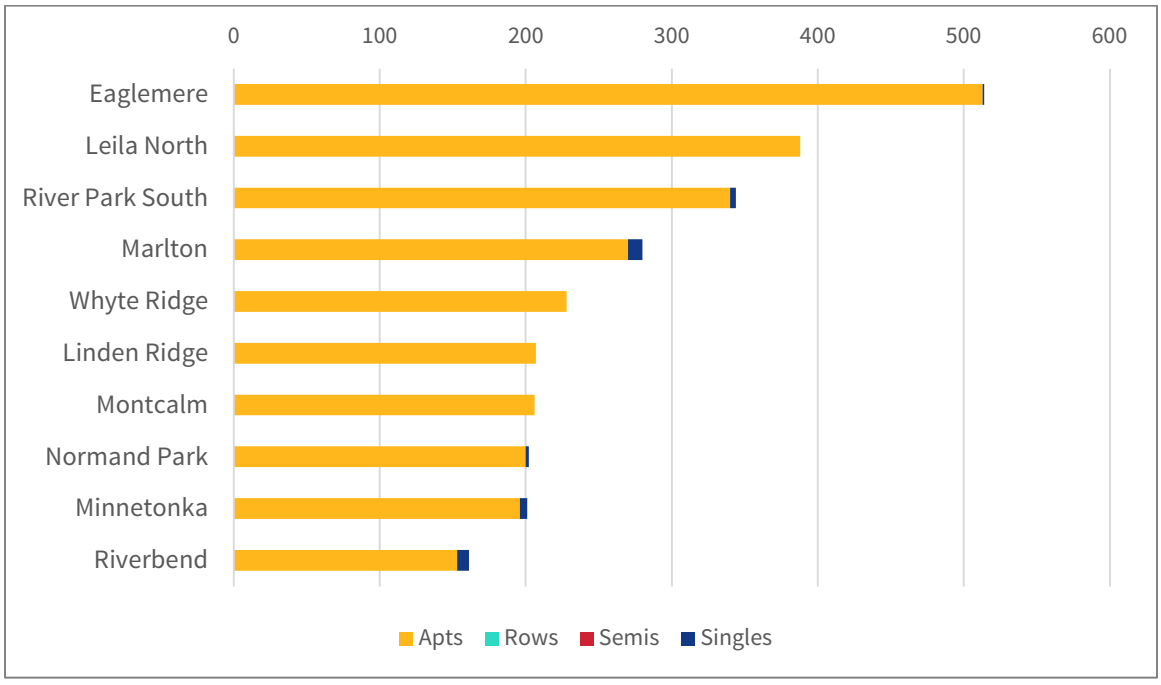


Figure 4-25: Top ten Recent Communities neighbourhoods by new dwelling units, 2020-24

A complete list of recent development activity by neighbourhood can be found in Appendix B.

4.6 Development Activity – Housing Accelerator Fund Implementation

On December 5, 2023, the City of Winnipeg entered into an agreement with the Government of Canada, through the Canada Mortgage and Housing Corporation for $122.4 million in funding from the Housing Accelerator Fund (HAF), whose intent is to incent municipalities across Canada to remove barriers to build more homes, faster. As per its agreement, the City is required to deliver on eight initiatives, one of which includes zoning amendments to allow for as-of-right residential development in mall sites and along commercial corridors, and to allow up to four dwelling units per residential lot as-of-right. Council approved the former on November 21, 2024, while it approved the latter on June 5, 2025. These amendments followed an earlier set of amendments to support the development of "missing middle" housing approved by Council on May 30, 2024.

Given that this report is based on data as of January 1, 2025, impacts of these initiatives have not been captured to-date. However, the following information has been compiled to serve as a baseline upon which progress can be measured.

From 2020 to 2024, permits have been issued for an average of 371 new dwelling units per year in the Malls and Corridors Planned Development Overlay (PDO) in Zoning By-law no. 200/06. There is a high level of year-over-year volatility in these numbers. PDO regulations distinguish between Urban Mixed Use Corridors and Regional Mixed Use Corridors, Regional Mixed Use Centres, and mall sites larger than 10 acres in area; a greater number of dwelling units were created in Regional areas, which is attributable largely to larger site sizes. Geographic differences between the Malls and Corridors PDO and those of the Corridor designation in the Urban Structure should be recognized; the former excluded areas regulated by other existing PDOs, while additional mall site lands were added.

Year	Regional	Urban	Total
2020	423	235	658
2021		109	109
2022	263	142	405
2023	405	248	653
2024		30	30
Total	1,091	764	1,855
Five-yr avg	364	153	371

Figure 4-26: Previous development activity in the Malls and Corridors PDO

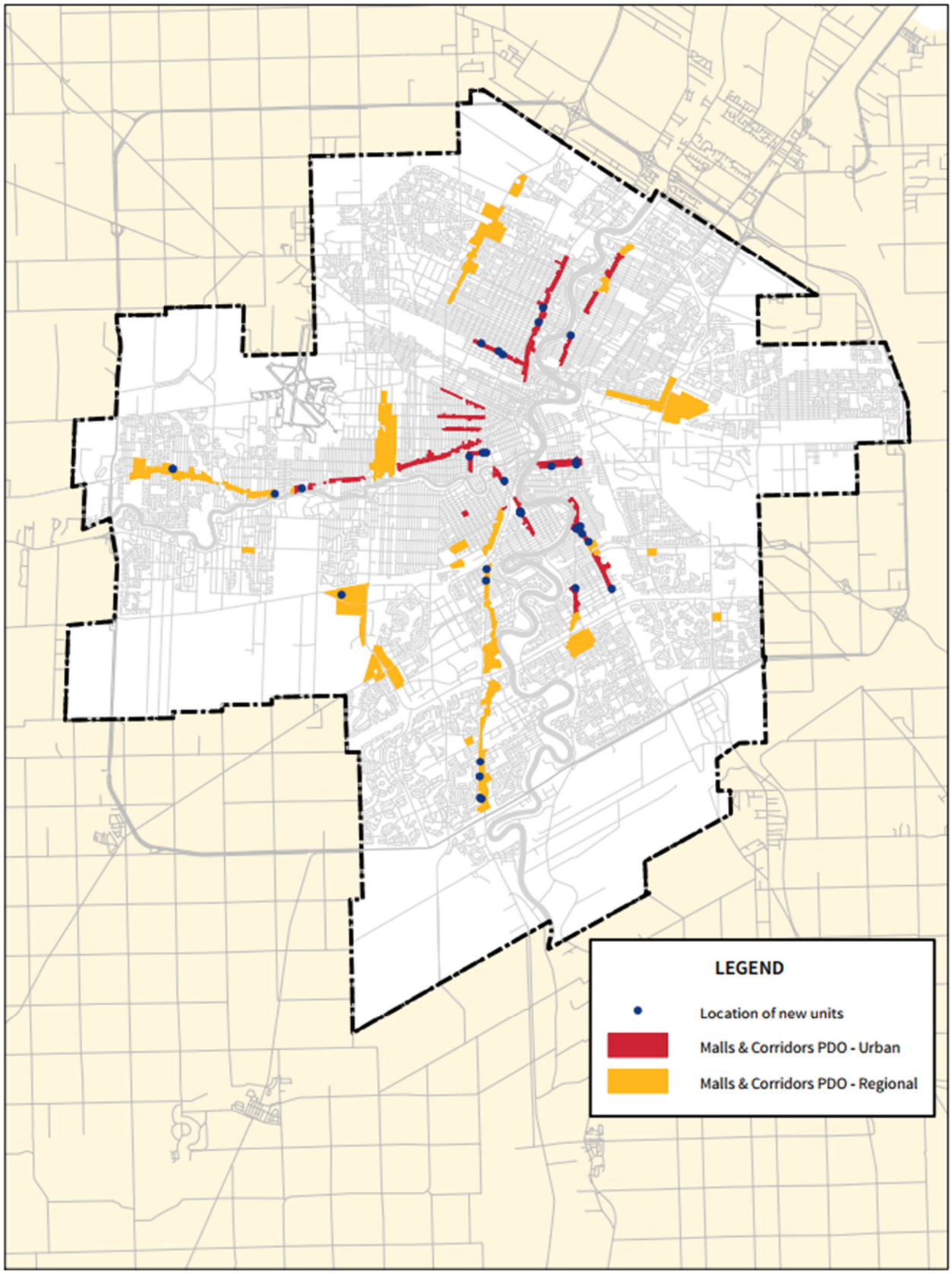


Figure 4-27: Previous development activity in the Malls and Corridors PDO

To the zoning amendment allowing up to four-unit developments as-of-right, the chart below describes a baseline of development activity in infill areas prior to these new regulations coming into force. Over the last five years, 15% of these projects have occurred in pre-existing buildings.

Year	Duplex	Triplex	Fourplex	Total
2020	20	17	11	48
2021	13	5	11	29
2022	11	2	11	24
2023	5	10	5	20
2024	9	6	6	21

Figure 4-28: Three- and four-plexes in the Intensification Target area, 2020-24

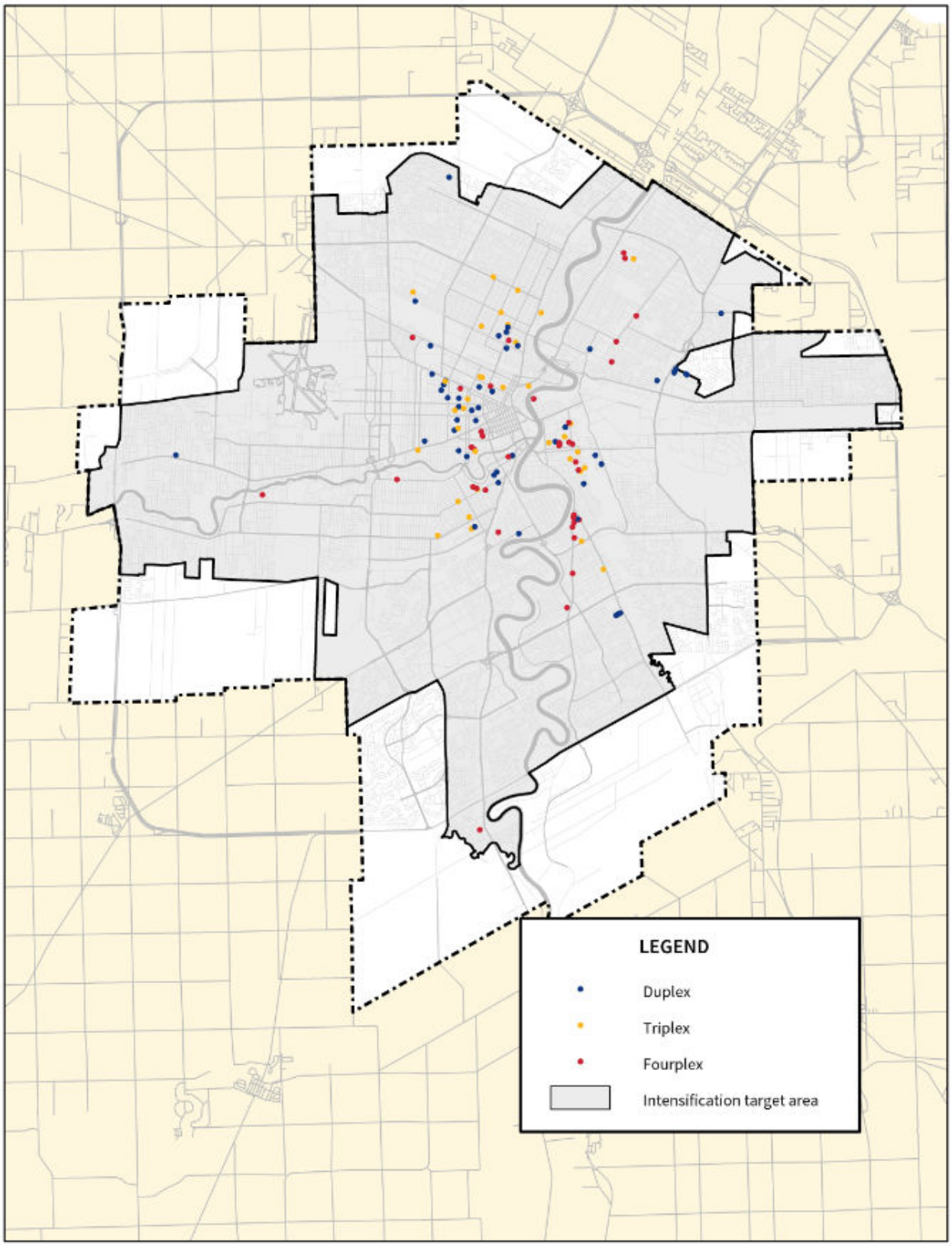


Figure 4-29: Three- and four-plexes in the Intensification Target area, 2020-24

4.7 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 5.5 of this report.

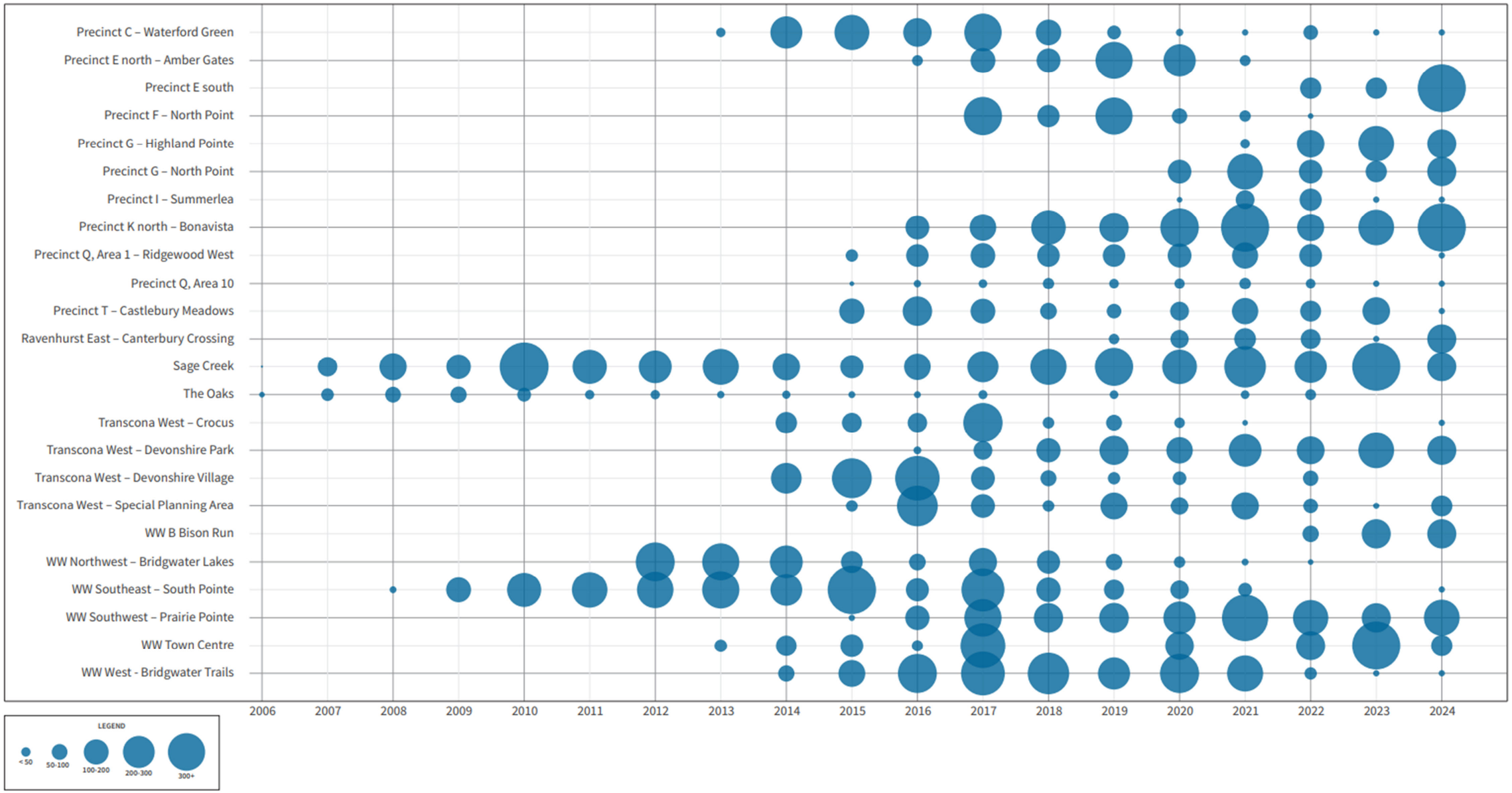


Figure 4-30: Magnitude of permits issued for new dwelling units by year, major greenfield sites

The chart below illustrates permits issued for the construction of new greenfield residential dwelling units, by dwelling type, in 2024. Section 5.5 provides additional detail on total and remaining capacity by site, including a map of these sites.

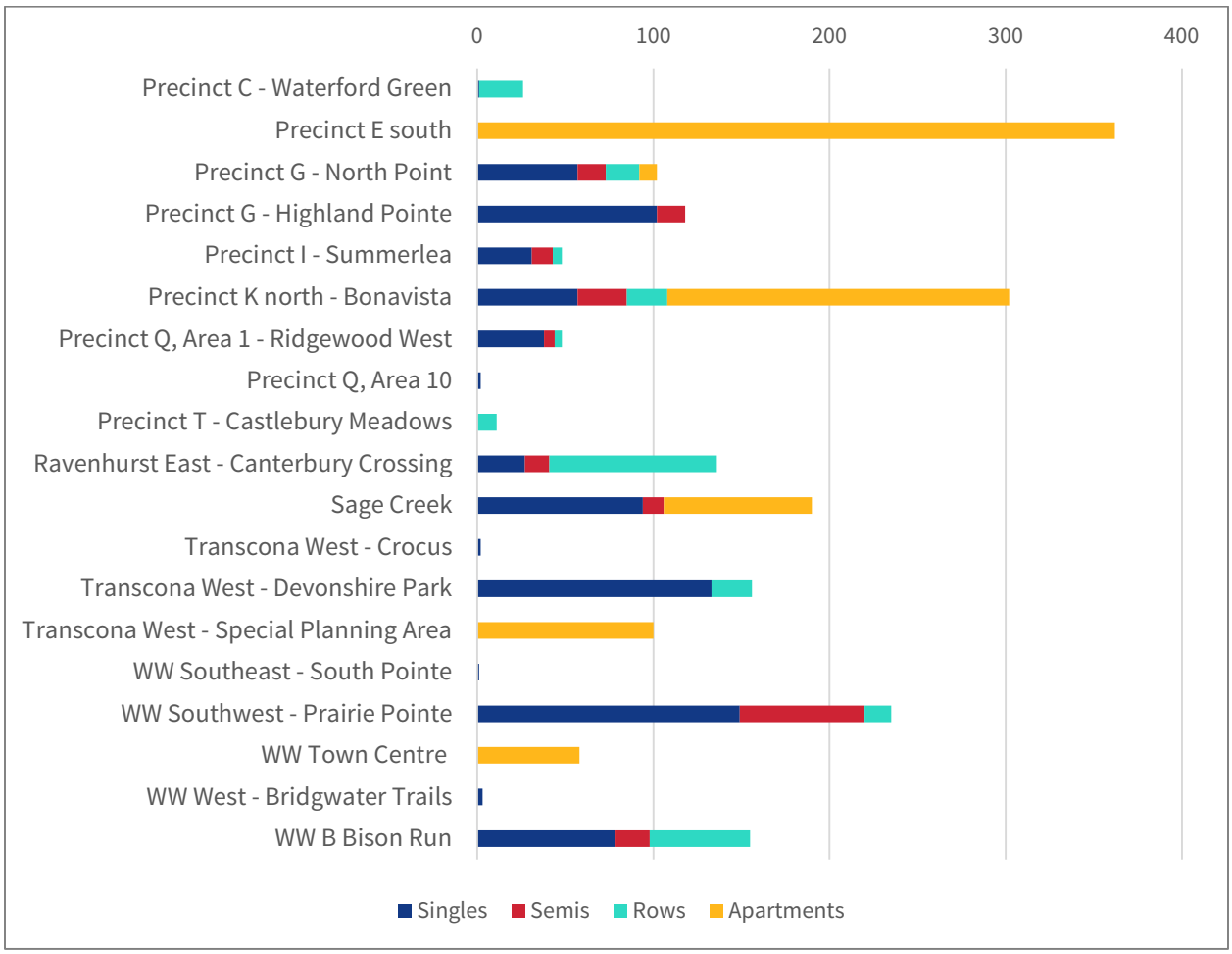


Figure 4-31: Greenfield dwelling units, 2024, by site and dwelling unit type

4.8 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
2024	174
Total	**840**

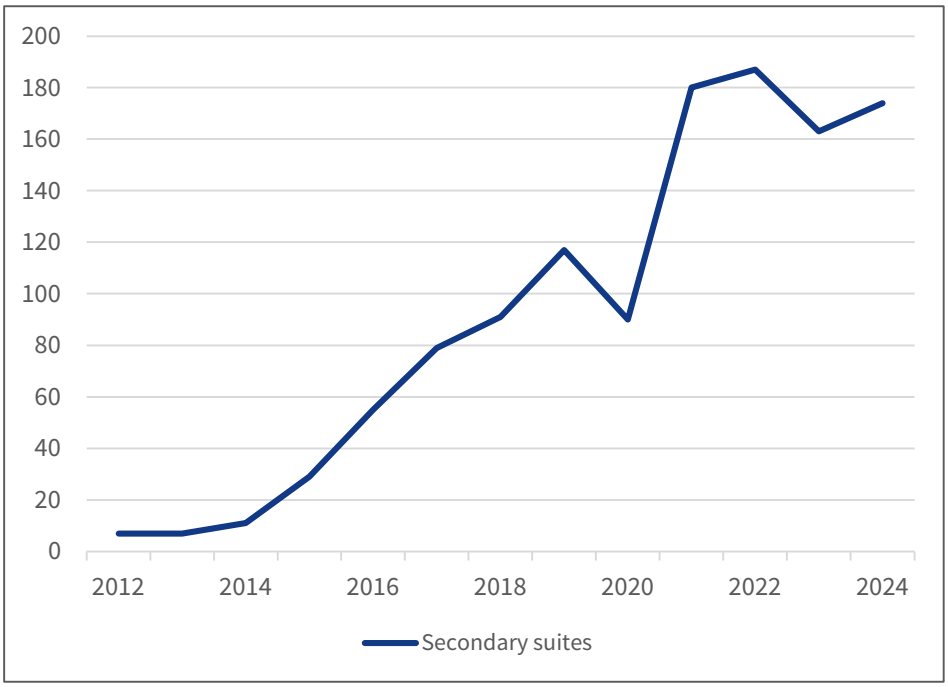


Figure 4-32: Permits issued for the construction of secondary suites, 2012 to 2024

New secondary suites are predominantly being built in existing neighbourhoods, particularly in Mature Communities. From 2012 to 2024, 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	2012-2024	
	No.	%
Corridor frontage	1	< 1
Urban Corridors	0	0
Regional Corridors	1	< 1
Established Neighbourhoods	1,141	96
Mature Communities	1,024	86
Recent Communities	117	10
Greenfield areas	37	3
Emerging Communities	37	3
New Communities	0	0
Downtown	0	0
Major Redevelopment Sites	6	< 1
Rural Agricultural	5	< 1
Total	**1,190**	

Figure 4-33: Permits issued for the construction of secondary suites, 2012 to 2024, by Complete Communities

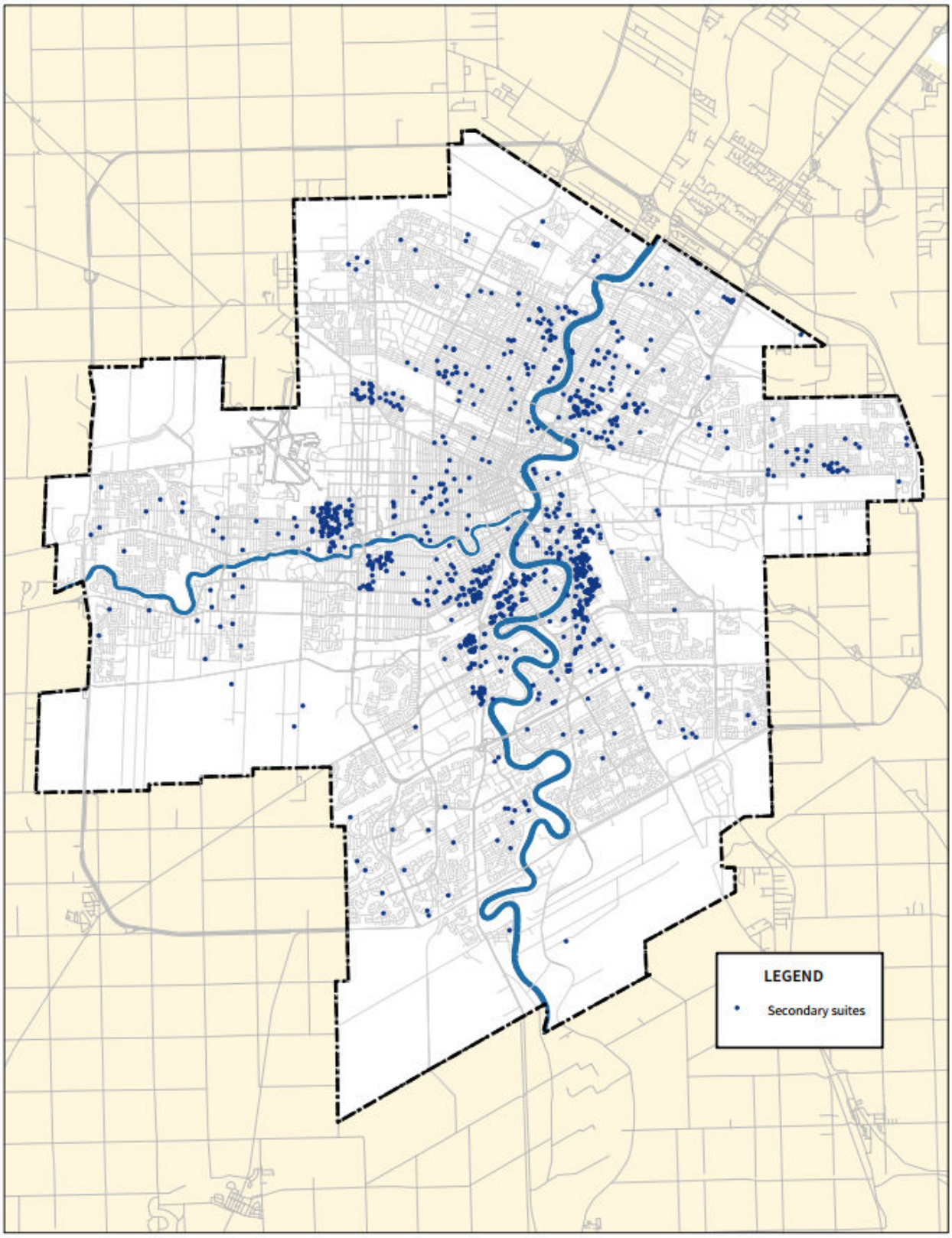


Figure 4-34: Permits issued for the construction of new secondary suites, 2012 to 2024

4.9 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 157 dwelling units lost in Infill Area 1, 143 units lost in Infill Area 2, and 32 units lost in Recent Communities.

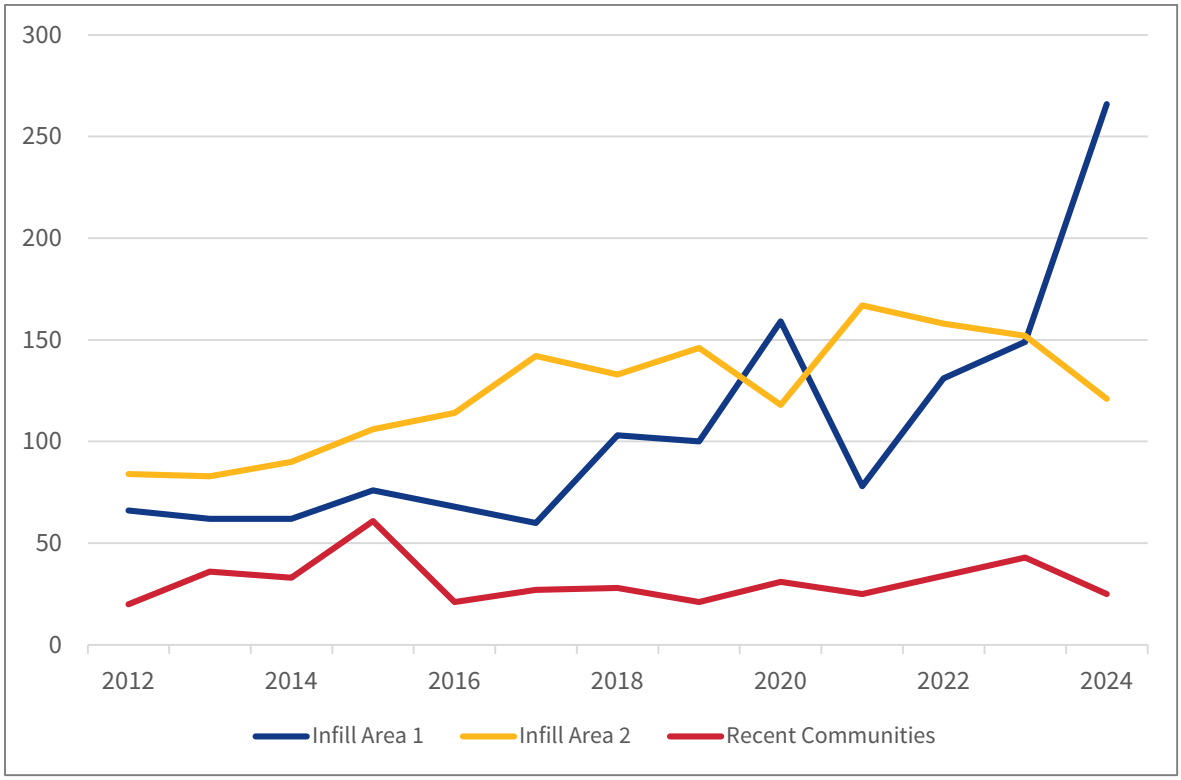


Figure 4-35: Average annual dwelling units lost, by area

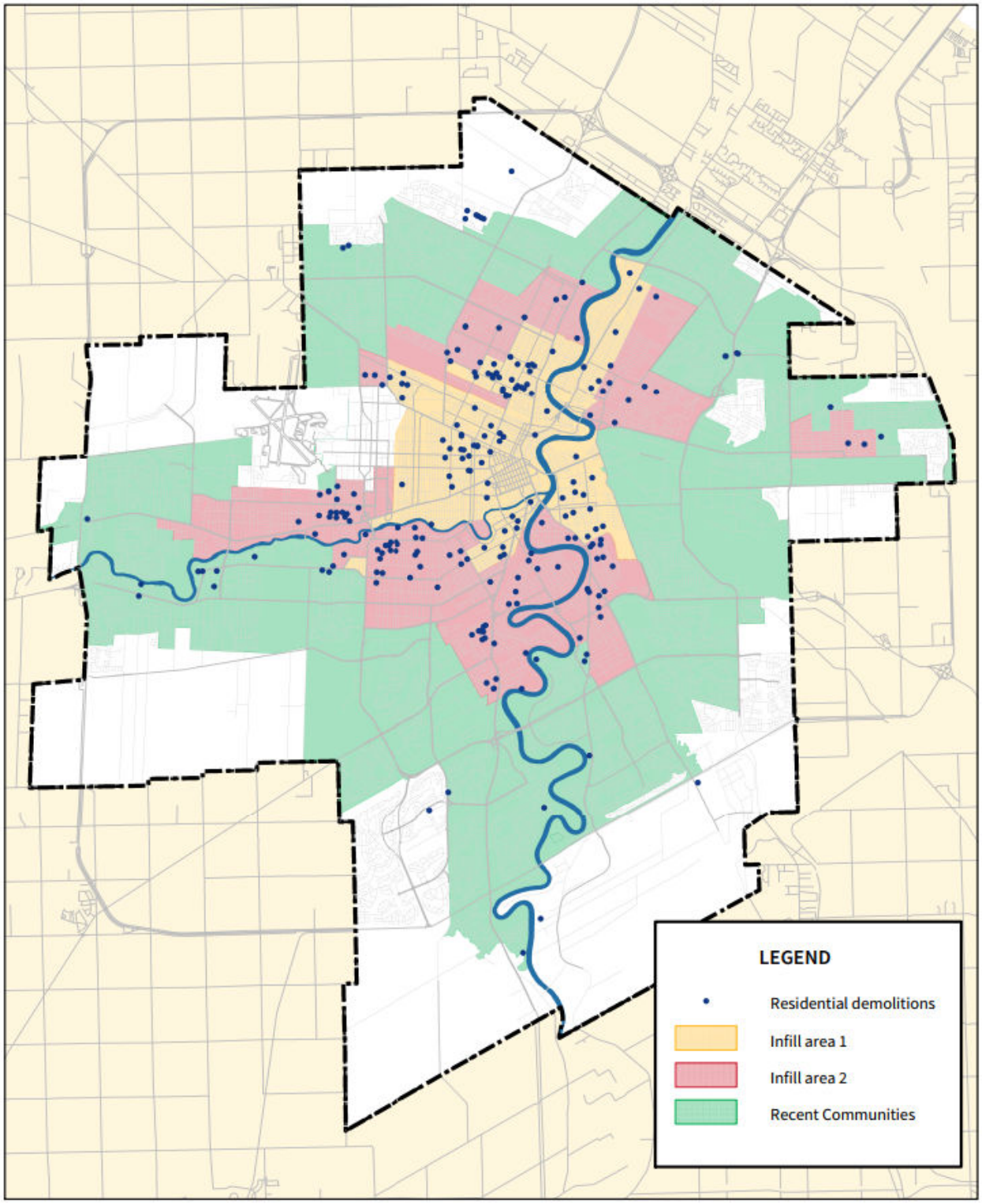


Figure 4-36: Map of residential demolitions, 2024

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 4-37 below

describes, over the last five years Infill Area 1 sees an average of seven 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 45 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
2024	871	266	3.3	556	121	4.6	991	25	39.6
5-yr avg.		**157**	**7.3**		**143**	**3.7**		**32**	**45.2**

Figure 4-37: Dwelling units created vs dwelling units lost, 2012 to 2024

5.0 Greenfield Residential Land Supply

5.1 Selecting a Demand Scenario

In June 2025, the City of Winnipeg's Office of Economic Research released *2025 Population Projections for the City of Winnipeg and the Winnipeg Census Metropolitan Area (CMA).* These projections provide three population growth scenarios ranging from low, to baseline, to high. The publication also provides related housing start forecasts.

From 2020 to 2024, Canada grew by 3.3 million people. From 2023 to 2024, it grew by 1.2 million people, which at three percent, is among the highest increases in the country's history. During this time, Manitoba grew by over 39,000 people, with the Winnipeg CMA accommodating 31,000 of these new residents. Looking forward, however, this level of growth is expected to slow in the coming years, as the most recent 2025-27 Immigration Levels Plan released by Immigration, Refugees, and Citizenship Canada plans for lower permanent immigration targets and significant net reductions in temporary residents. These reductions signal the federal government's intention to slow population growth in response to concerns related to housing affordability. The City's 2025 population forecast reflects this; growth is anticipated to level off from 2026 to 2029, before returning to 2010-2019 levels in the 2030s. The Low projection expects the City to reach a population of 896,100 people by 2049, the Baseline projection 1,002,700 people, and the High projection 1,092,300 people. Each scenario considers varying rates in fertility, net permanent immigration, net non-permanent immigration, and interprovincial outmigration.

These population projection scenarios were used to forecast housing starts based on demographic changes, historical housing starts by type, and current interest rates. All scenarios expect a short-term spike in housing starts owing to the City's Housing Accelerator Fund agreement with Canada Mortgage and Housing Corporation (CMHC), with subsequent moderation expected. 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[1] over the last five years.

[1] Accounting for projected changes in household size and share of regional growth captured by the City.

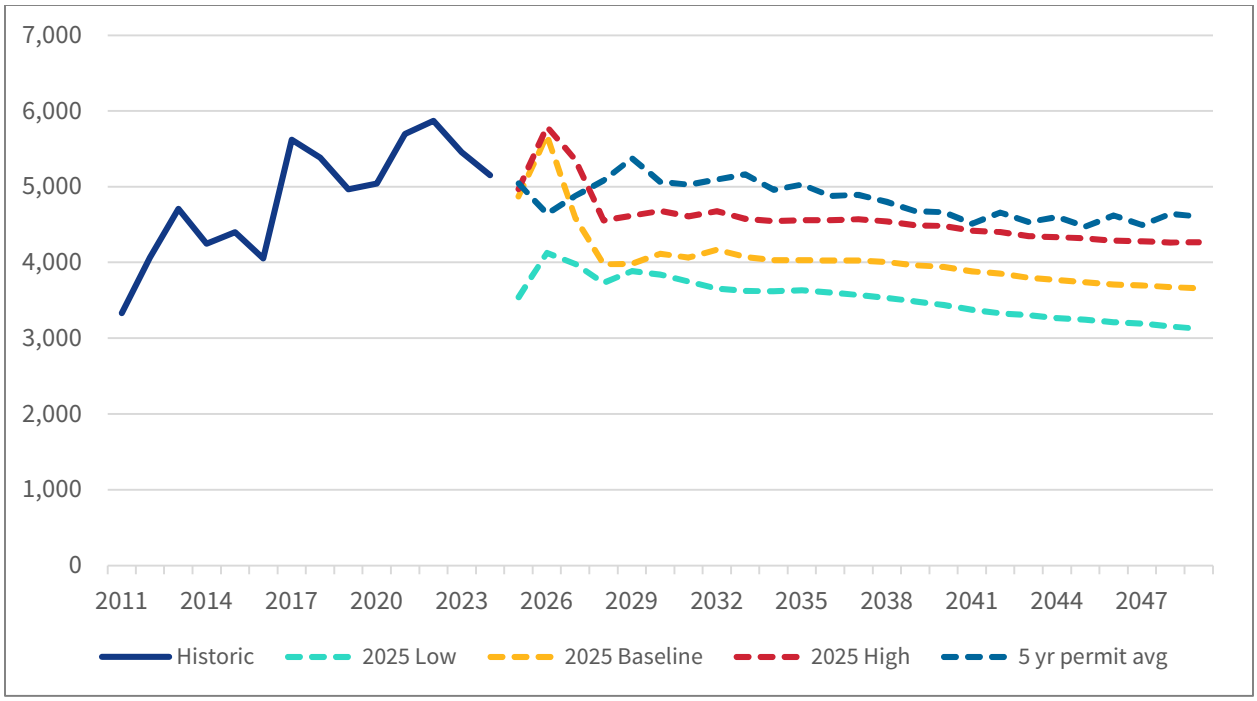


Figure 5-1: Forecasted housing starts compared to a scenario based on development activity over the last five years

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 longer 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.

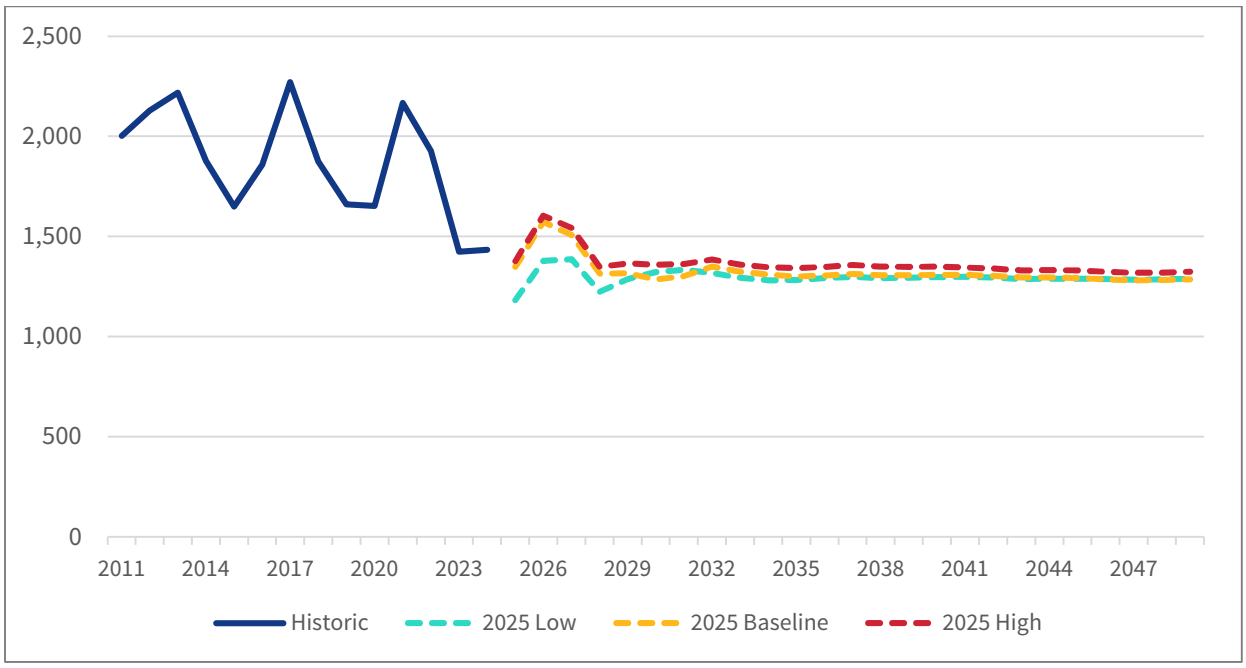


Figure 5-2: Forecasted singles, 2025 to 2049

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 2025 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. Except where intensification rates are prescribed, estimated supplies assume the continuation of existing development trends, notably the distribution of dwelling types to greenfield and infill areas.

Scenarios	Annual avg. GF demand, all dwelling types (units)	Years supply		
		Serviced	Inf. Installed & B/L approved	Planned
CCDS 2.0 supply targets	**n/a**	**5-7**	**3-5**	**10**
2025 CoW forecasts				
2025 Low	1,806	11.5	7.5	15.5
2025 Baseline	2,008	10	7	14
2025 High	2,215	9.5	6	13
2020-24 permit scenarios				
Five-year permit	2,184	9.5	6	13
5-yr at 50% infill	2,136	9.5	6	13
5-yr at 40% infill	2,550	8	5	11
Mid-range scenarios				
2025 Low (mid-range)	1,995	10.5	6.5	14
2025 Baseline (mid-range)	2,096	10	6.5	13.5
2025 High (mid-range)	2,199	9.5	6	13
2025 High (MR) at 50% infill	2,377	8.5	5.5	12
2025 High (MR) at 40% infill	2,840	7	4.5	10

Figure 5-3: Range of contemplated greenfield demand scenarios, all dwelling types

Figure 5-4 shows how the number of forecasted annual greenfield units per scenario compares to historical figures over the last decade.

2016	2017	2018	2019	2020	2021	2022	2023	2024	2020-24 avg
2,207	3,482	1,840	1,994	2,017	2,606	1,989	2,415	2,192	2,244

Figure 5-4: All greenfield dwelling units, 2011-2024

With greenfield demand being driven primarily by demand for ground-oriented housing (single-detached, semi-detached, and rowhouses), it is worth considering how land supply changes when only considering this more limited form of land supply.

Scenarios	Annual avg. GF demand, ground-oriented dwelling types (units)	Years supply		
		Serviced	Inf. Installed & B/L approved	Planned
CCDS 2.0 supply targets	**n/a**	**5-7**	**3-5**	**10**
2025 CoW forecasts				
2025 Low	1,275	9.5	5.5	14
2025 Baseline	1,304	8.5	5	13
2025 High	1,355	8	5	12
2020-24 permit scenarios				
Five-year permit	1,296	9	5.5	13.5
5-yr at 50% infill	1,273	9.5	5.5	14
5-yr at 40% infill	1,389	8.5	5	13
Mid-range scenarios				
2025 Low (mid-range)	1,286	9	5.5	13.5
2025 Baseline (mid-range)	1,300	9	5.5	13.5
2025 High (mid-range)	1,326	8.5	5	13
2025 High (MR) at 50% infill	1,443	8	4.5	12
2025 High (MR) at 40% infill	1,575	7	4.5	11

Figure 5-5: Range of contemplated greenfield demand scenarios, ground-oriented dwellings

Figure 5-6 shows how the number of forecasted annual greenfield ground-oriented units per scenario compares to historical figures over the last decade.

2016	2017	2018	2019	2020	2021	2022	2023	2024	2020-24 avg
1,607	2,101	1,419	1,386	1,386	1,764	1,340	1,006	1,248	1,345

Figure 5-6: Ground-oriented greenfield dwelling units, 2011-2024

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 2025 forecasts are based on demographic and macroeconomic analysis, while permit scenarios simply project existing shorter-term trends;
- 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, close alignment between the "2025 High", "Five-year permit", and "5-yr at 50% infill" scenarios for all dwelling types suggest any of three would be appropriate as the Primary demand scenario; the "Five-year permit" was selected due to consistency with previous reports. Beyond this scenario, the "5-yr at 40% infill" (heretofore 'High' in Section 5.2 below) and "2025 Low" ('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.

Given the necessity of greenfield land to accommodate single-detached, semi-detached, and rowhouse dwellings, and the inverse ability to accommodate apartments in infill areas, it is recommended that greenfield land supply be measured only using ground-oriented demand. It should be noted that doing so reduces differences between scenarios, as they vary most with regards to forecasted apartment dwellings.

5.2 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 5-7 below and are accurate as of January 1, 2025.

[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.

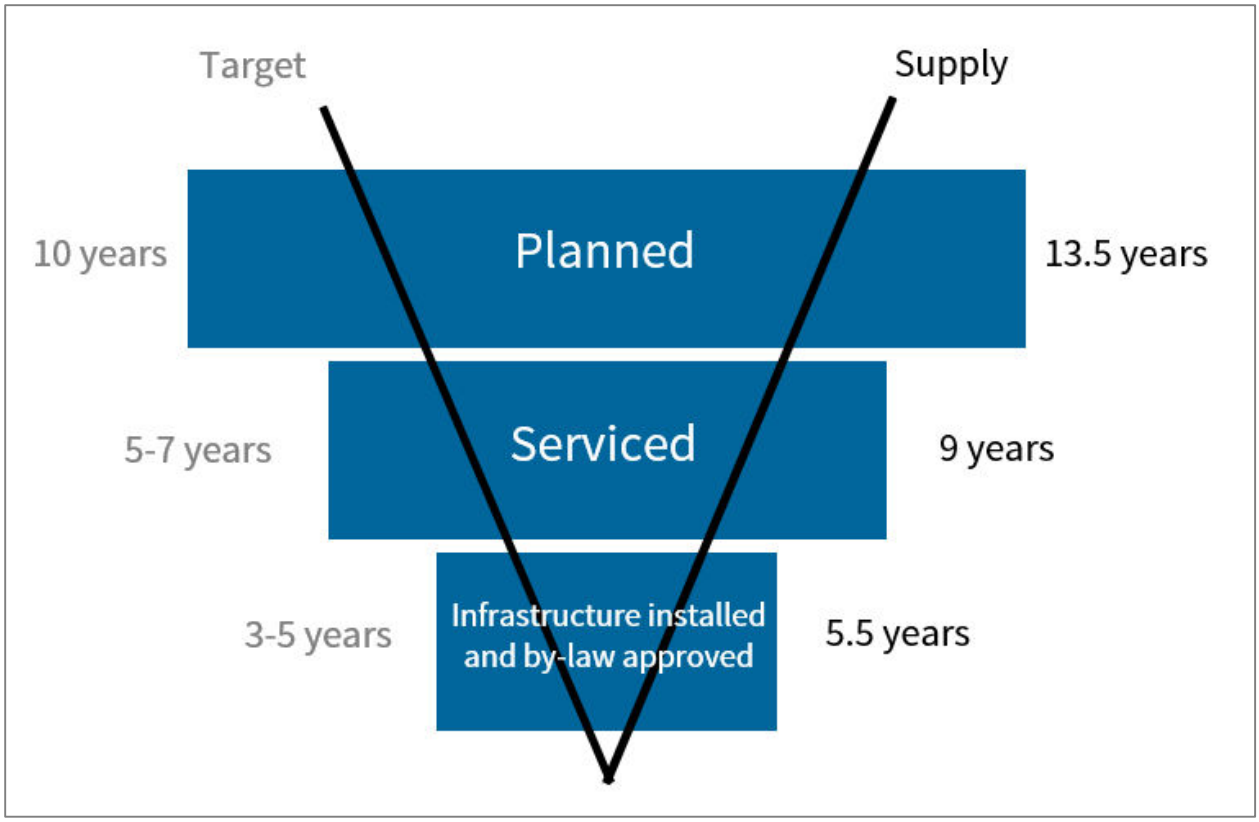


Figure 5-7: City of Winnipeg vacant residential greenfield land supplies in relation to Complete Communities 2.0 targets, as of January 1, 2025

These figures represent a minimal change from those in last year's report, which forecasted 12 years of planned supply, 9 years of serviced supply, and 5.5 years of supply where all growth-enabling infrastructure is installed and subdivision bylaws are approved. 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.

[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.

Years supply is determined by dividing total ground-oriented land supply by forecasted annual greenfield ground-oriented land demand. 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")	13 years	13.5 years	14 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land ("Serviced")	8.5 years	9 years	9.5 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.	5 years	5.5 years	5.5 years

Figure 5-8: 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")	14 years	14.5 years	15 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land ("Serviced")	9.5 years	10 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.	5.5 years	6 years	6 years

Figure 5-9: 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.

5.3 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.

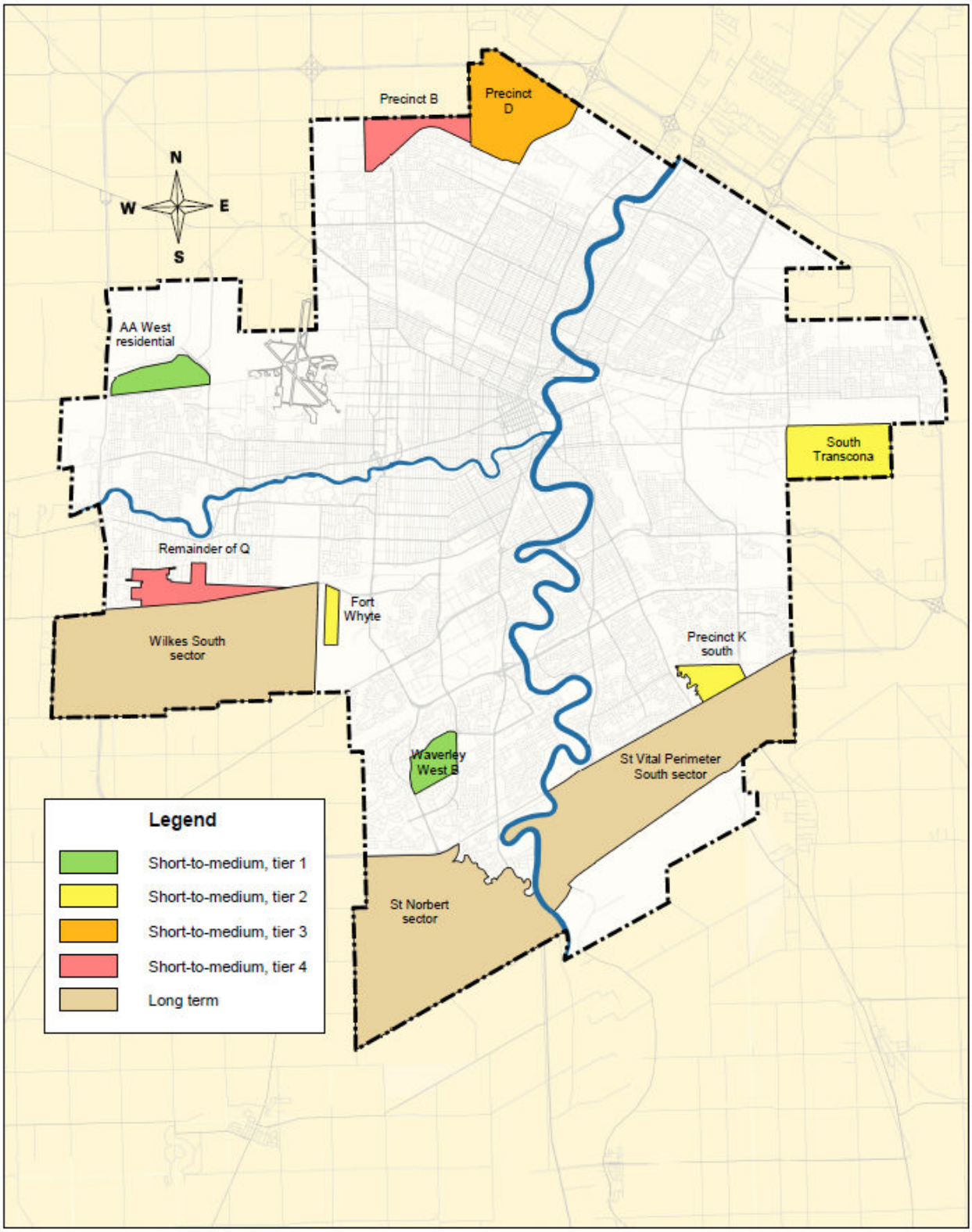


Figure 5-10: Map of greenfield phasing, Complete Communities 2.0

Figures 5-11 and 5-12 below quantify the City's greenfield land supplies with CCDS 2.0's phasing policies, while 5-13 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. Note that Airport Area West Residential (Short-to-medium, tier 1) is planned to be serviced in phases, so demand for subsequent tiers will likely be accelerated by up to approximately a year and a half.

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	9.5 years
Short-to-medium term lands[1]	14.5 years	15 years	15.5 years
Long term lands	33 years	35 years	35.5 years
Total potential land supply	56 years	59 years	60.5 years

Figure 5-11: 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	9.5 years	10 years	10 years
Short-to-medium term lands	16 years	17 years	17.5 years
Long term lands	36.5 years	38.5 years	39.5 years
Total potential land supply	62 years	65.5 years	67 years

Figure 5-12: Years supply by Complete Communities 2.0 greenfield phasing, Alternative Higher supply scenario

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

Tiers	High demand		Primary demand		Low demand	
	Forecast	Alt. higher	Forecast	Alt. higher	Forecast	Alt. higher
Short-to-medium, tier 1	2034	2034	2034	2035	2034	2035
Short-to-medium, tier 2	2035	2036	2036	2037	2036	2037
Short-to-medium, tier 3	2039	2040	2040	2041	2040	2042
Short-to-medium, tier 4	2044	2046	2045	2047	2046	2048
Long term	2048	2050	2049	2052	2050	2052

Notes:

- 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.
- Given the planned phased servicing of Airport Area West Residential (Short-to-medium, tier 1), demand for subsequent tiers will likely be accelerated by up to approximately a year and a half.

Figure 5-13: Years each phasing tier will be needed to maintain greenfield residential land supply

5.4 Supply by Dwelling Types

The table below details the estimated supply of potential remaining greenfield dwelling units[1], by dwelling type.

Category	Supply scenario	Singles	Semis	Rows	Total G.O.[2]	Apts	Total
Planned and serviced	Standard	6,050	2,540	3,290	11,870	8,660	20,520
	Alt. Higher	5,160	3,650	4,100	12,900	11,140	24,040
Planned, but unserviced	Standard	3,620	920	1,260	5,800	1,880	7,680
	Alt. Higher	3,150	1,500	1,730	6,380	2,310	8,680
Unplanned	Standard	38,910	9,280	11,470	59,650	33,920	93,570
	Alt. Higher	33,070	16,450	16,660	66,180	41,720	107,910

Figure 5-14: Total greenfield residential supply, by dwelling type

5.5 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 5-15 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.

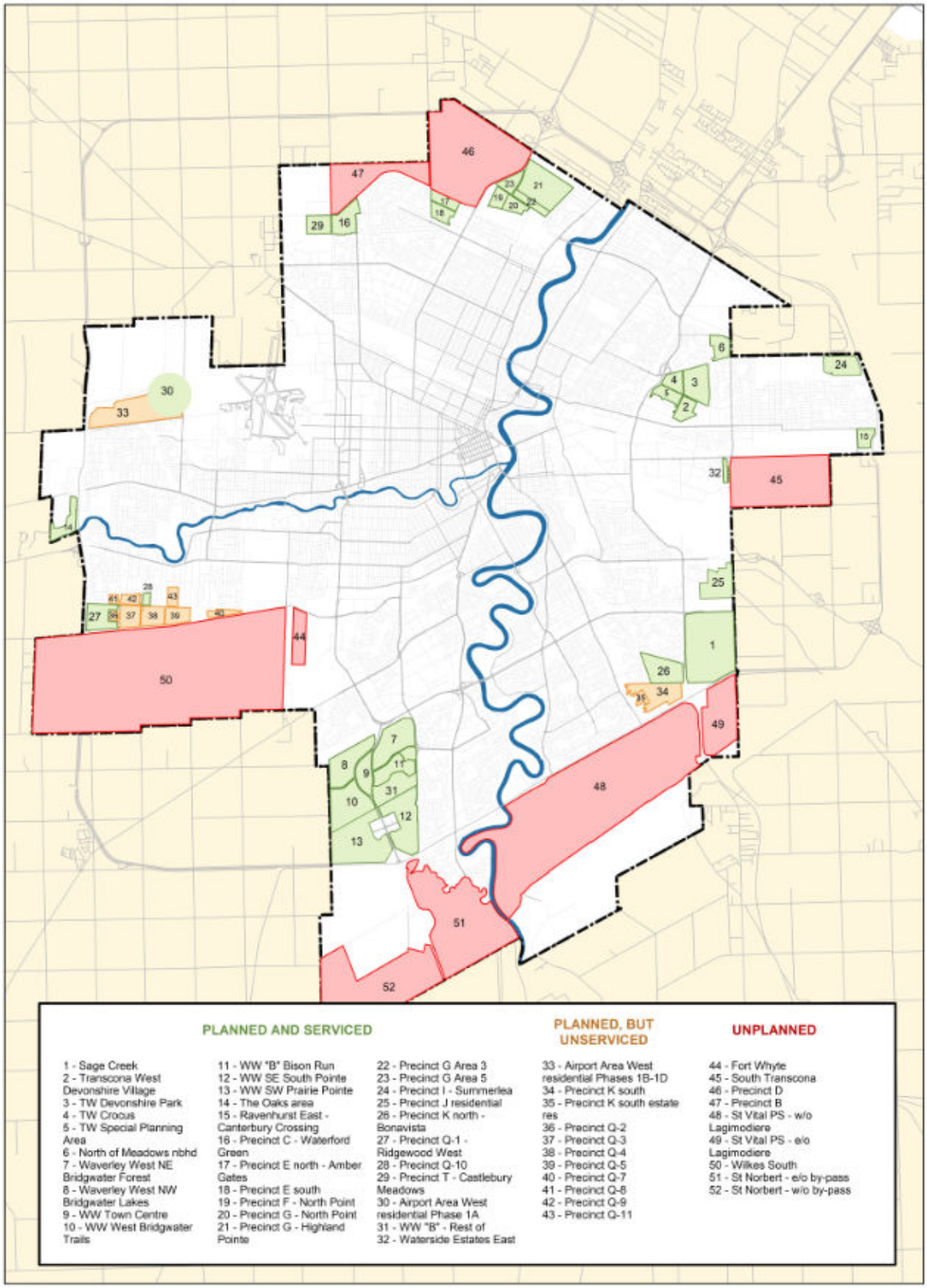


Figure 5-15: Greenfield supply, by site

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	2,270	50	280	1,250	3,850
Transcona West – Devonshire Village	250	60	220	480	1,000
Transcona West – Devonshire Park	830	80	120	150	1,180
Transcona West – Crocus	260	130	0	230	630
Transcona West – Special Planning Area	130	150	80	630	980
North of Meadows neighbourhood	0	0	0	0	0
WW Northeast – Bridgwater Forest	1,110	0	120	510	1,740
WW Northwest – Bridgwater Lakes	1,190	0	0	0	1,190
WW Town Centre	0	130	250	1,070	1,440
WW West – Bridgwater Trails	1,030	260	60	590	1,950
WW B – Bison Run	200	20	80	0	300
WW B – Rest of	0	0	0	0	0
WW Southeast – South Pointe	1,400	0	600	480	2,480
WW Southwest – Prairie Pointe	1,180	280	140	390	1,980
The Oaks area	210	0	0	0	210
Ravenhurst East – Canterbury Crossing	230	50	100	0	380
Airport Area West residential – Phase 1A	0	0	0	0	0
Precinct C – Waterford Green	600	120	90	190	1,000
Precinct E north – Amber Gates	330	40	0	360	720
Precinct E south	0	0	0	520	520
Precinct F – North Point	170	110	60	350	690
Precinct G – North Point	240	90	110	180	620
Precinct G – Highland Pointe	310	60	20	170	560
Precinct G – Area 3	0	0	0	0	0
Precinct G – Area 5 (triangle)	0	0	0	0	0
Precinct I – Summerlea	200	20	10	0	230
Precinct J residential	0	0	0	0	0
Precinct K north – Bonavista	1,020	120	70	750	1,960
Precinct Q, Area 1 – Ridgewood West	730	10	50	0	800
Precinct Q, Area 10	90	0	0	0	90
Precinct T – Castlebury Meadows	310	400	110	40	850
Waterside Estates East	0	0	0	0	0
Planned and serviced total	**14,290**	**2,190**	**2,570**	**8,320**	**27,350**

Figure 5-16: 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	2,750	180	730	1,440	5,100	71	87	75	480	130	460	1,060	190	1,250
TW – Devonshire Vlg	250	60	220	480	1,000	100	100	100	0	0	0	0	0	0
TW – Devonshire Prk	1,120	180	310	130	1,740	64	100	68	290	90	190	580	0	580
TW – Crocus	270	140	0	230	640	100	100	100	0	0	0	10	0	10
TW – SPA	120	170	130	1,070	1,490	84	59	66	0	30	50	70	440	520
North of Meadows nbhd	320	80	100	280	780	0	0	0	320	80	100	490	280	780
WW NE – Bridgwater Forest	1,130	0	120	510	1,750	98	100	99	20	0	0	20	0	20
WW NW – Bridgwater Lakes	1,200	0	0	0	1,200	99	n/a	99	10	0	0	10	0	10
WW Town Centre	0	130	250	1,290	1,670	100	92	86	0	10	0	10	230	230
WW W – Bridgwater Trls	1,040	270	0	970	2,280	100	61	86	10	10	0	20	380	390
WW B – Bison Run	310	40	200	700	1,250	55	0	24	110	20	120	240	700	950
WW B – Rest of	730	170	270	800	1,720	0	0	0	730	170	270	1,170	800	1,970
WW SE – South Pt	1,410	0	570	410	2,390	100	100	100	10	0	0	10	0	10
WW SW – Prairie Pointe	2,290	1,020	410	920	4,640	43	42	43	1,110	750	270	2,130	540	2,660
The Oaks area	210	110	0	0	320	66	n/a	66	0	110	0	110	0	110
Ravenhurst East – Cntrbry Cross.	290	70	100	0	450	84	n/a	84	50	20	0	70	0	70
AA West– Ph 1A	390	90	120	340	940	0	0	0	390	90	120	600	340	940
Pr. C – Waterford Grn.	600	200	150	190	1,140	85	100	87	0	90	60	150	0	180
Pr. E north – Amber Gates	330	40	0	510	880	100	70	82	0	0	0	0	160	160
Pr. E south	50	140	470	1,110	1,780	0	46	29	50	140	470	660	600	1,260
Pr. F – North Pt	160	120	50	780	1,110	100	45	63	0	0	0	0	430	430
Pr. G – North Pt	340	130	140	160	760	73	100	82	100	30	30	160	0	160
Pr. G – Highland Pt	1,190	390	360	920	2,860	20	18	20	880	330	340	1,540	750	2,290
Pr. G – Area 3	250	60	70	210	590	0	0	0	250	60	70	380	210	590
Pr. G – Area 5	130	30	40	110	300	0	0	0	130	30	40	190	110	300
Pr. I – Summerlea	690	40	360	0	1,100	21	n/a	21	490	20	350	860	0	860
Pr. J res	520	230	190	2,070	3,010	0	0	0	520	230	190	940	2 , 0 7 0	3,010
Pr. K north – Bonavista	1,030	130	100	840	2,100	96	89	93	10	10	30	50	150	200
Pr. Q-1 – Ridgewood West	820	40	60	0	920	87	n/a	87	90	20	10	120	0	120
Pr. Q-10 – Sctswd Meadow	90	0	0	0	90	100	n/a	100	0	0	0	0	0	0
Pr. T – Cstlbry Meadow	310	390	120	220	1,050	99	16	81	10	0	10	20	190	210
Waterside Estates East	10	70	120	160	360	0	0	0	10	70	120	200	160	360

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	20,320	**4,710**	**5,740**	**16,870**	**47,380**		**n/a**		**6,050**	**2,540**	**3,290**	**11,870**	**8,660**	**20,520**
PLANNED, BUT UNSERVICED														
AA West res – Ph 1B	490	120	150	430	1,180				490	120	150	750	430	1,180
AA West res – Ph 1C	450	110	130	390	1,070				450	110	130	680	390	1,080
AA West res – Ph 1D	480	110	140	420	1,150				480	110	140	730	420	1,150
Pr. K south	740	180	220	640	1,770				740	180	220	1,130	640	1,770
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	130	200	0	610				280	130	200	610	0	610
Pr. Q-4	290	130	200	0	620		n/a		290	130	200	620	0	620
Pr. Q-5	250	120	180	0	550				250	120	180	550	0	550
Pr. Q-7	70	30	50	0	150				70	30	50	150	0	150
Pr. Q-8	70	0	0	0	70				70	0	0	70	0	70
Pr. Q-9	190	0	0	0	190				190	0	0	190	0	190
Pr. Q-11	190	0	0	0	190				190	0	0	190	0	190
Planned but unserviced total	**3,620**	**920**	**1,260**	**1,880**	**7,680**				**3,620**	**920**	**1,260**	**5,800**	**1,880**	**7,680**
UNPLANNED														
Fort Whyte	620	150	180	540	1,490				620	150	180	950	540	1,490
South Transcona	2,060	490	610	1,800	4,960				2,060	490	610	3,160	1,800	4,960
Precinct D	4,850	1,160	1,430	4,230	11,650				4,850	1,160	1,430	7,430	4,230	11,650
Precinct B	1,690	400	500	1,480	4,080				1,690	400	500	2,600	1,480	4,080
St. Vital PS – w/o Lagimodiere	4,730	1,130	1,390	4,120	11,360				4,730	1,130	1,390	7,240	4,120	11,360
St. Vital PS – e/o Lagimodiere	1,540	370	460	1,350	3,710		n/a		1,540	370	460	2,370	1,350	3,710
Wilkes South	14,150	3,370	4,170	12,340	34,030				14,150	3,370	4,170	21,700	12,340	34,030
St. Norbert – e/o by-pass	3,360	800	990	2,930	8,090				3,360	800	990	5,150	2,930	8,090
St. Norbert – w/o by-pass	5,910	1,410	1,740	5,150	14,200				5,910	1,410	1,740	9,050	5,150	14,200
Unplanned total	**38,910**	**9,270**	**11,470**	**33,920**	**93,570**				**38,910**	**9,270**	**11,470**	**59,650**	**33,920**	**93,570**

Figure 5-17: 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	2,680	270	800	1,480	5,220	70	84	74	410	220	520	1,140	240	1,380
TW – Devonshire Vlg	250	60	220	480	1,000	100	100	100	0	0	0	0	0	0
TW – Devonshire Prk	1,080	230	350	160	1,820	62	92	65	250	150	230	630	10	640
TW – Crocus	270	140	0	230	640	98	100	99	0	0	0	10	0	10
TW – SPA	120	170	130	1,160	1,570	84	54	62	0	30	50	70	530	600
North of Meadows nbhd	270	140	140	350	890	0	0	0	270	140	140	540	350	890
WW NE – Bridgwater Forest	1,120	0	120	510	1,760	98	100	99	10	0	0	20	0	20
WW NW – Bridgwater Lakes	1,200	0	0	0	1,200	99	n/a	99	10	0	0	10	0	10
WW Town Centre	0	130	250	1,320	1,700	100	80	85	0	10	0	10	260	270
WW W – Bridgwater Trls	1,040	270	0	1,140	2,460	100	52	79	0	10	0	20	550	570
WW B – Bison Run	290	60	210	880	1,440	54	0	21	90	40	130	260	880	1,140
WW B – Rest of	630	300	370	1,170	2,470	0	0	0	630	300	370	1,300	1,170	2,470
WW SE – South Pt	1,410	0	570	410	2,390	100	100	100	0	0	0	10	0	10
WW SW – Prairie Pointe	2,120	1,230	560	1,240	5,150	41	31	39	940	950	420	2,310	860	3,170
The Oaks area	210	110	0	0	320	66	n/a	66	0	110	0	110	0	110
Ravenhurst East – Cntrbry Cross.	280	80	100	0	460	82	n/a	82	50	30	10	80	0	80
AA West– Ph 1A	330	170	170	420	1,090	0	0	0	330	170	170	670	420	1,090
Pr. C – Waterford Grn.	600	200	150	190	1,140	85	100	87	0	90	60	150	0	150
Pr. E north – Amber Gates	330	40	0	580	950	100	62	76	0	0	0	0	220	220
Pr. E south	40	150	490	1,200	1,890	0	43	27	40	150	490	690	690	1,370
Pr. F – North Pt	160	120	50	960	1,290	100	37	54	0	0	0	0	610	610
Pr. G – North Pt	320	140	150	160	770	71	100	81	90	50	40	180	0	180
Pr. G – Highland Pt	1,050	550	480	1,100	3,180	19	15	18	740	490	460	1,790	930	2,620
Pr. G – Area 3	210	100	110	260	680	0	0	0	210	100	110	420	260	680
Pr. G – Area 5	110	50	50	130	350	0	0	0	110	50	50	210	130	350
Pr. I – Summerlea	620	130	420	0	1,170	20	n/a	20	420	110	410	940	0	940
Pr. J res	440	330	260	2,500	3,530	0	0	0	440	330	260	1,030	2,500	3,530
Pr. K north – Bonavista	1,030	130	110	900	2,160	96	84	91	10	10	30	50	150	200
Pr. Q-1 – Ridgewood West	810	50	60	0	930	86	n/a	86	80	40	10	130	0	130
Pr. Q-10 – Sctswd Meadow	90	0	0	0	90	100	n/a	100	0	0	0	0	0	0
Pr. T – Cstlbry Meadow	310	390	120	240	1,070	99	15	80	10	0	20	20	210	230
Waterside Estates East	0	80	120	190	400	0	0	0	0	80	120	200	190	400

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	**19,430**	**5,820**	**6,550**	**19,360**	**51,170**	**n/a**			**5,160**	**3,650**	**4,100**	**12,900**	**11,140**	**24,040**
PLANNED, BUT UNSERVICED														
AA West res – Ph 1B	420	210	210	530	1,360				420	210	210	840	530	1,360
AA West res – Ph 1C	380	190	200	480	1,240				380	190	200	760	480	1,240
AA West res – Ph 1D	410	200	200	510	1,320				410	200	200	810	510	1,320
Pr. K south	630	310	320	790	2,040				630	310	320	1,250	790	2,040
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	180	250	0	670				240	180	250	670	0	670
Pr. Q-4	240	180	250	0	680	n/a			240	180	250	680	0	680
Pr. Q-5	220	160	230	0	600				220	160	230	600	0	600
Pr. Q-7	60	50	60	0	170				60	50	60	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	**3,150**	**1,500**	**1,730**	**2,310**	**8,680**				**3,150**	**1,500**	**1,730**	**6,380**	**2,310**	**8,680**
UNPLANNED														
Fort Whyte	530	260	270	660	1,710				530	260	270	1,050	660	1,710
South Transcona	1,750	870	880	2,210	5,720				1,750	870	880	3,510	2,210	5,720
Precinct D	4,120	2,050	2,080	5,200	13,440				4,120	2,050	2,080	8,240	5,200	13,440
Precinct B	1,440	720	730	1,820	4,700				1,440	720	730	2,880	1,820	4,700
St. Vital PS – w/o Lagimodiere	4,020	2,000	2,020	5,070	13,100				4,020	2,000	2,020	8,040	5,070	13,100
St. Vital PS – e/o Lagimodiere	1,310	650	660	1,660	4,280	n/a			1,310	650	660	2,630	1,660	4,280
Wilkes South	12,030	5,980	6,060	15,180	39,250				12,030	5,980	6,060	24,070	15,180	39,250
St. Norbert – e/o by-pass	2,860	1,420	1,440	3,610	9,320				2,860	1,420	1,440	5,720	3,610	9,320
St. Norbert – w/o by-pass	5,020	2,500	2,530	6,330	16,380				5,020	2,500	2,530	10,040	6,330	16,380
Unplanned total	**33,070**	**16,450**	**16,660**	**41,720**	**107,910**				**33,070**	**16,450**	**16,660**	**41,720**	**41,720**	**107,910**

Figure 5-18: Estimated potential total and remaining units by site, Alternative Higher supply scenario

Figure 5-19 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	12.7 (31.4)	13.0 (32.1)
TW – Devonshire Village	27.4 (67.7)	27.4 (67.7)
TW – Devonshire Park	15.4 (38.1)	16.1 (39.8)
TW – Crocus	15.1 (37.3)	15.1 (37.3)
TW – Special Planning Area	35.3 (87.2)	37.3 (92.2)
WW NW – Bridgwater Lakes	7.9 (19.5)	7.9 (19.5)
WW Town Centre	20.8 (51.4)	21.2 (52.4)
WW W – Bridgwater Trails	12.1 (29.9)	13.0 (32.1)
WW B – Bison Run	18.5 (45.7)	21.4 (52.9)
WW SE – South Pointe	11.4 (28.2)	11.4 (28.2)
WW SW – Prairie Pointe	15.9 (39.3)	17.6 (43.5)
The Oaks area	5.2 (12.8)	5.2 (12.8)
Ravenhurst East – Canterbury Crossing	11.8 (29.2)	12.0 (29.7)
Pr. C – Waterford Green	12.9 (31.9)	12.9 (31.9)
Pr. E north – Amber Gates	21.9 (54.1)	23.6 (58.3)
Pr. E south	48.9 (120.8)	51.9 (128.2)
Pr. F – North Point	30.9 (76.4)	36.0 (89.0)
Pr. G – North Point	19.1 (47.2)	19.6 (48.4)
Pr. G – Highland Pointe	14.0 (34.6)	15.0 (37.1)
Pr. I – Summerlea	12.5 (30.9)	13.4 (33.1)
Pr. J residential	25.9 (64.0)	30.3 (74.9)
Pr. K north – Bonavista	17.2 (42.5)	17.7 (43.7)
Pr. Q-1 – Ridgewood West	10.1 (25.0)	10.2 (25.3)
Pr. Q-10 – Scotswood Meadows	6.7 (16.6)	6.7 (16.6)
Pr. T – Castlebury Meadow	17.4 (43.0)	17.8 (44.0)
Waterside Estates East	23.1 (57.1)	25.5 (63.0)
All other sites projected to an average greenfield density	15.7 (38.8)	16.7 (41.3)

Figure 5-19: 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.

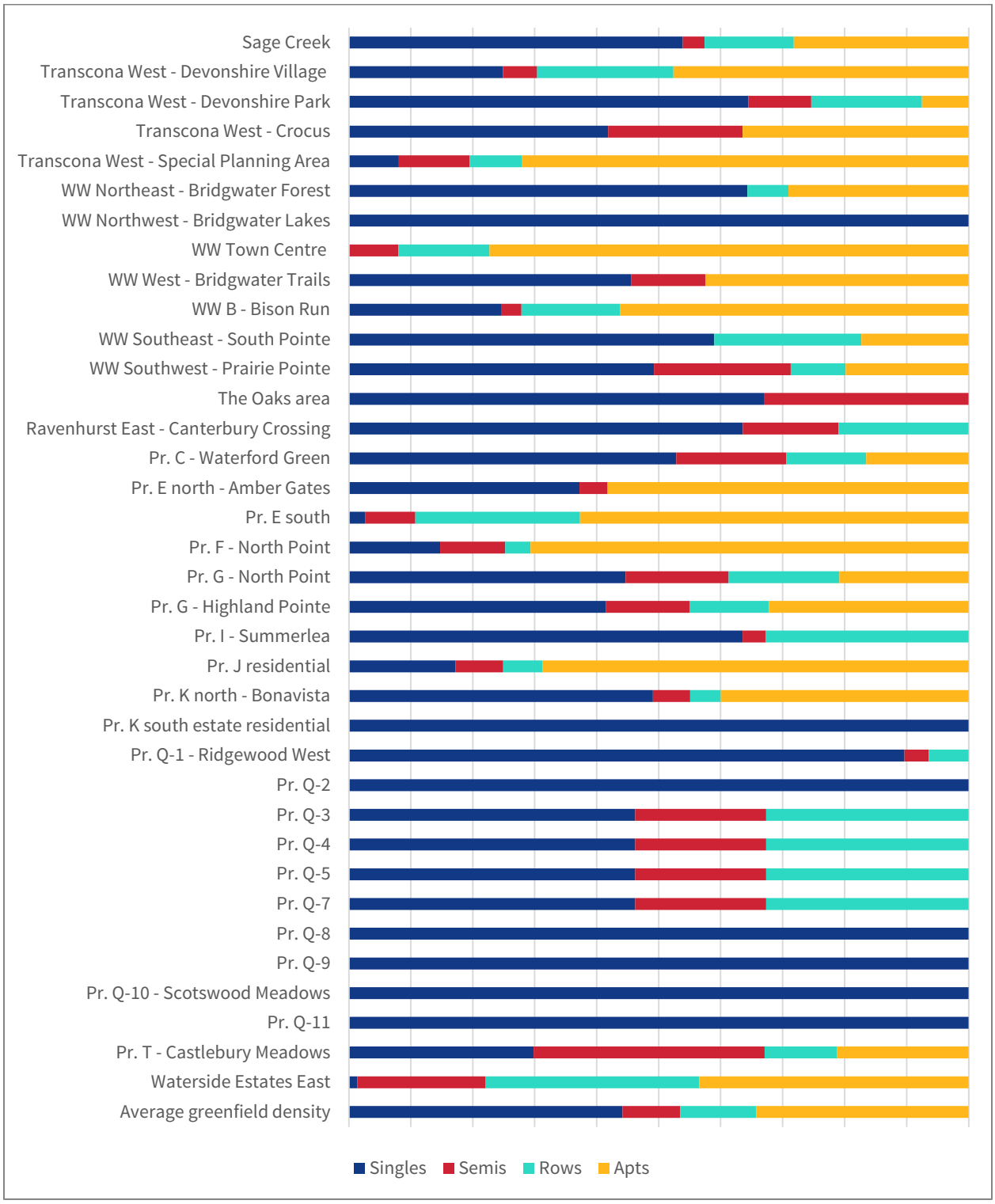


Figure 5-20: Forecasted dwelling unit mix, Standard supply scenario

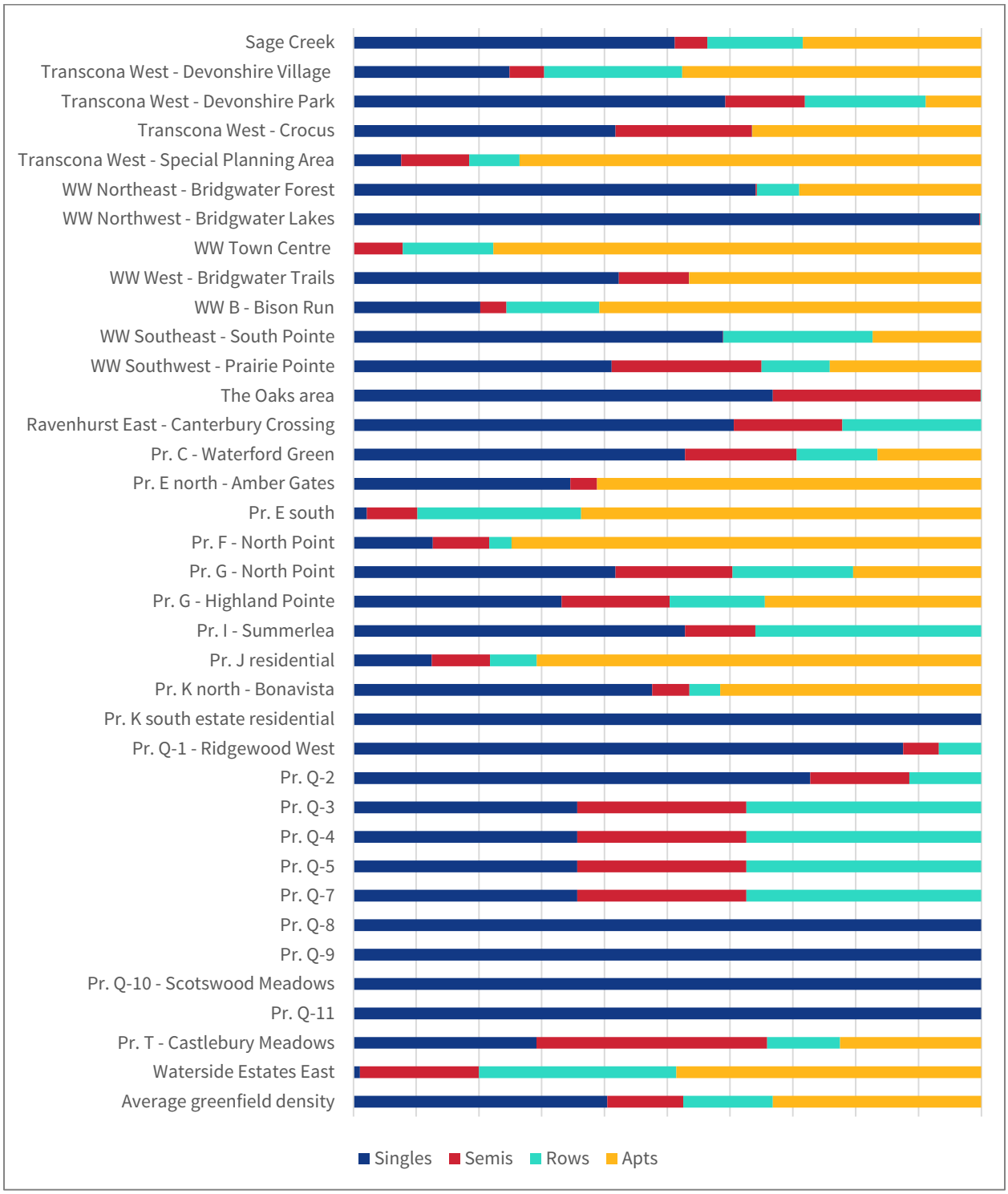


Figure 5-21: Forecasted dwelling unit mix, Alternative Higher supply scenario

5.6 Changes in Supply

As described in Section A.1 in Appendix A, these supply forecasts were developed using a standardized methodology. Previous 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 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.
- An ongoing planning process in South Transcona is contemplating higher densities than what is currently being forecasted.

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.

Compared to last year's forecast, significant planned and serviced supply was gained through Council development application approval, either because sites had not been previously zoned for residential development or because subdivisions were approved at densities higher than originally forecasted.

- Approximately 600 to 800 additional units were gained in Waverley West Southwest (Prairie Pointe) based on Council approval of DASZ 29/2023, which was previously zoned commercial and had not been projected for residential development.
- Approximately 400 to 600 additional units were gained in Precinct F (North Point) based on Council approval of DASZ 31/2022, which was also previously zoned commercial and had not been projected for residential development.
- Approximately 600 additional units were gained in Precinct J based on Council approval of DASZs 12/2024 and 17/2024.
- Approximately 350 to 400 additional units were gained with the addition of Waterside Estates East through Council approval of DASZ 16/2024.

- Approximately 150 additional units were gained in Precinct E South based on Council approval of DASZs 18/2023 and 19/2024.
- Approximately 100 additional units were gained in Waverley West (Bridgwater) Town Centre based on Council approval of DASZ 28/2023.
- 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 15.1 to 15.7 units per net acre (from 37.3 to 38.8 units per net hectare), resulting in further supply gains.

Such changes may not be surprising; within reason, this forecast intentionally errs on the side of underestimating supply, where doing so provides more advance notice on infrastructure investment timing.

The combined effect of these gains has resulted in a small absolute increase in greenfield land supply between 2024 and 2025, as noted in Figures 5-22 below. Land supplies do not always decrease in full step with absorption. Figure 5-23 details changes in planned and serviced greenfield land supply over time; as land is developed upon, more may be brought online.

Year	Singles	Semis	Rows	Total G.O.	Apts	Total
2024	6,590	2,190	3,750	12,530	7,940	20,420
2025	6,050	2,540	3,290	11,870	8,660	20,520
Change (+/-)	-540	+350	-460	-660	+720	+100

Figure 5-22: Change in planned and serviced greenfield land supply, 2024 vs 2025

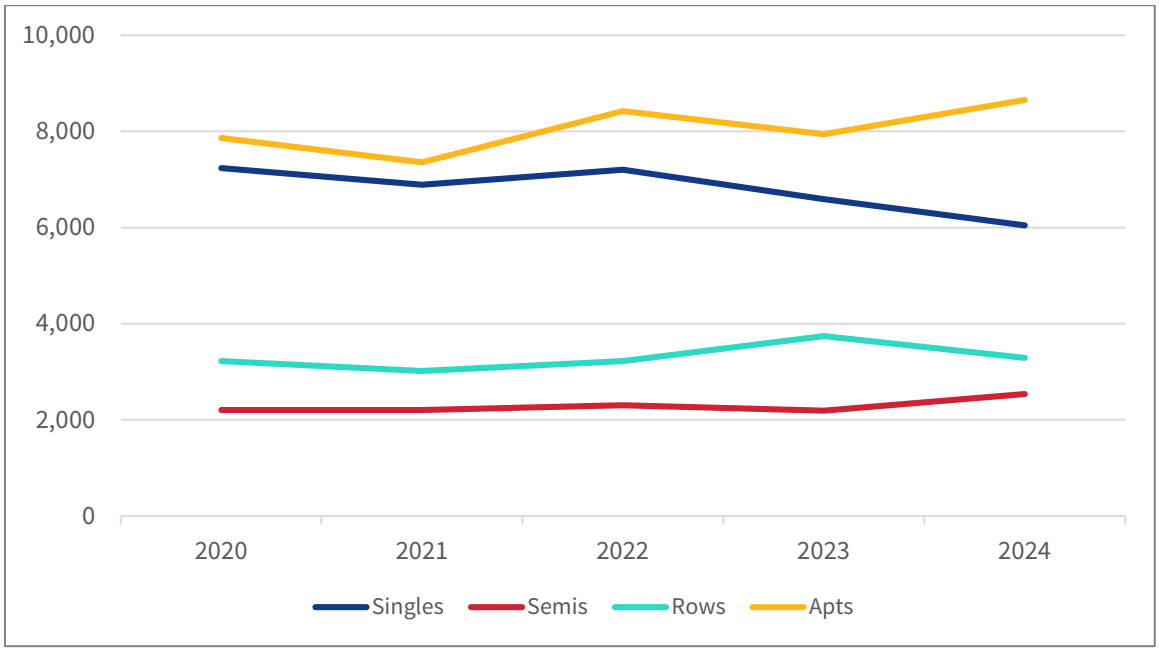


Figure 5-23: Change in planned and serviced greenfield land supply, by dwelling type, 2020 to 2024

Basing supply estimates on ground-oriented dwelling units, instead of all dwelling units, also contributed to a small reduction in estimated land supplies.

While supply increased from 2024 to 2025, average annual demand has decreased during the same time, driven by changes in City housing forecasts and historical housing starts over the five-year period comprising the Primary demand scenario. These two factors resulted in increases in years supply, including increases in the years in which growth-enabling infrastructure and plans should be delivered, beyond what may have been expected based on 2024 reporting.

Year	High		Primary		Low	
	G.O.	Total	G.O.	Total	G.O.	Total
2024	1,460	2,470	1,430	2,300	1,320	2,050
2025	1,380	2,550	1,310	2,180	1,280	1,810
Change (+/-)	-80	+80	-120	-120	-40	-240

Figure 5-24: Change in annual average forecasted greenfield demand by scenario, 2020 vs 2024

Looking ahead, the Public Service is currently engaged in a collaborative precinct planning process for landowners in South Transcona. Once a plan is approved by Council, this may result in gains in Planned supply if planned densities exceed the average densities upon which the area is currently forecasted.

6.0 Non-Residential Development Activity

6.1 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 in Appendix A.

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
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
2024	590	250	150	420	160	230	1,800
2020-24 avg.	300	320	490	690	320	360	2,200

Figure 6-1: Non-residential development activity, 2020-24, by estimated number of jobs[1]

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
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
2024	412,380	266,990	5,750	179,080	112,370	243,510	1.2m
2020-24 avg.	186,330	319,740	194,500	453,430	201,090	323,550	1.5m

Figure 6-2: Non-residential development activity, 2020-24, by building floor area (sq. ft.)

In 2024, notable major non-residential projects included:

- A two storey, 137,000 sq. ft. addition to the existing Springs Christian Academy at 639 Lagimodiere Blvd in the Symington Yards neighbourhood.
- An 111,000 sq. ft. warehouse building at 140 Ray Marius Rd in the St Boniface Industrial neighbourhood.
- A 109,000 sq. ft. addition to an existing industrial building (Monarch Industrial) at 51 Burmac Rd in the Mint neighbourhood.

[1] Numbers in Figures 6-1 and 6-2 are rounded

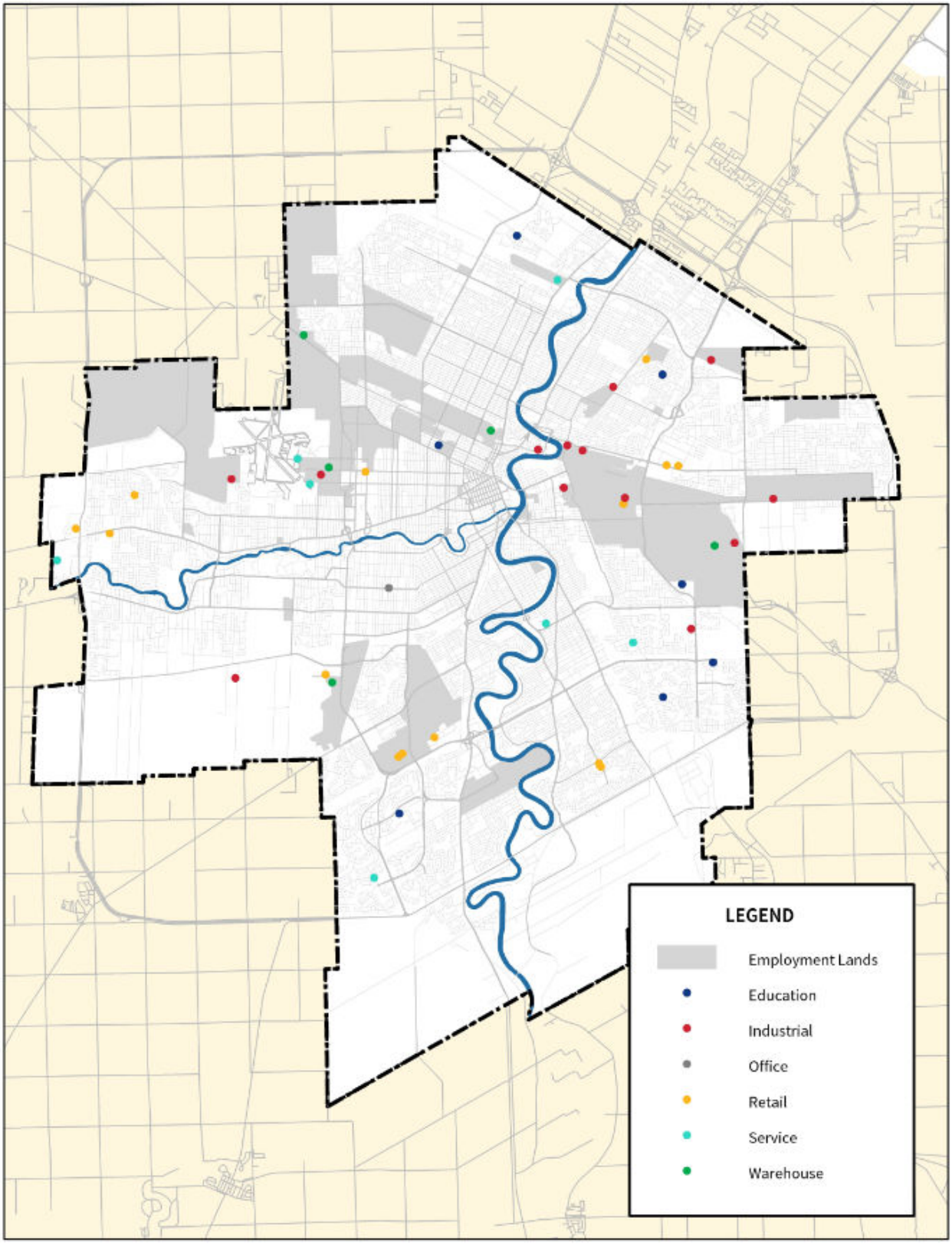


Figure 6-3: Location of non-residential development activity, 2024, by job type

Over the last five years, 25% of all new non-residential floor area occurred as additions to existing buildings, rather than as new buildings.

By building type	2020	2021	2022	2023	2024	2020-24 avg.
Addition	27%	20%	20%	41%	38%	25%
New building	73%	80%	80%	59%	62%	75%

Figure 6-4: Non-residential development activity by building type, 2020-24, 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	2020	2021	2022	2023	2024	2020-24 avg.
Absorption of vacant land	51%	8%	52%	37%	40%	41%
Intensification of developed land	49%	92%	48%	63%	60%	59%

Figure 6-5: Non-residential development activity by land uptake, 2020-24, 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.

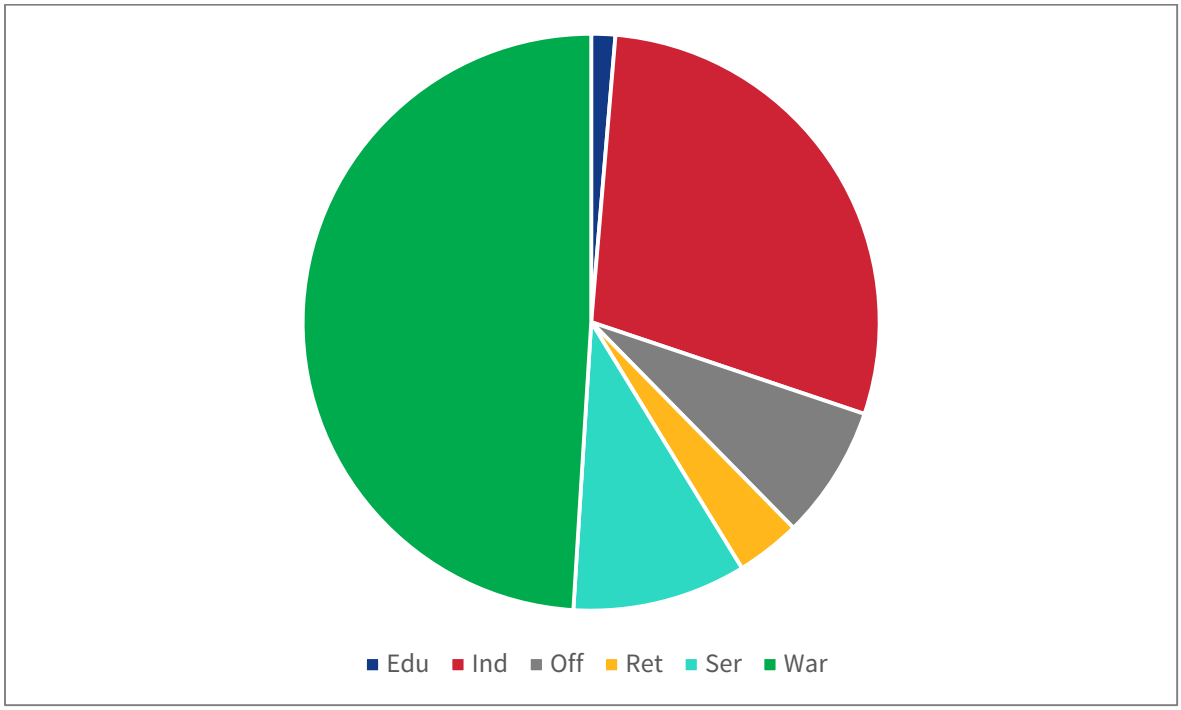


Figure 6-6: Non-residential development activity in designated Employment Lands by job type, East quadrant 2020-24

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

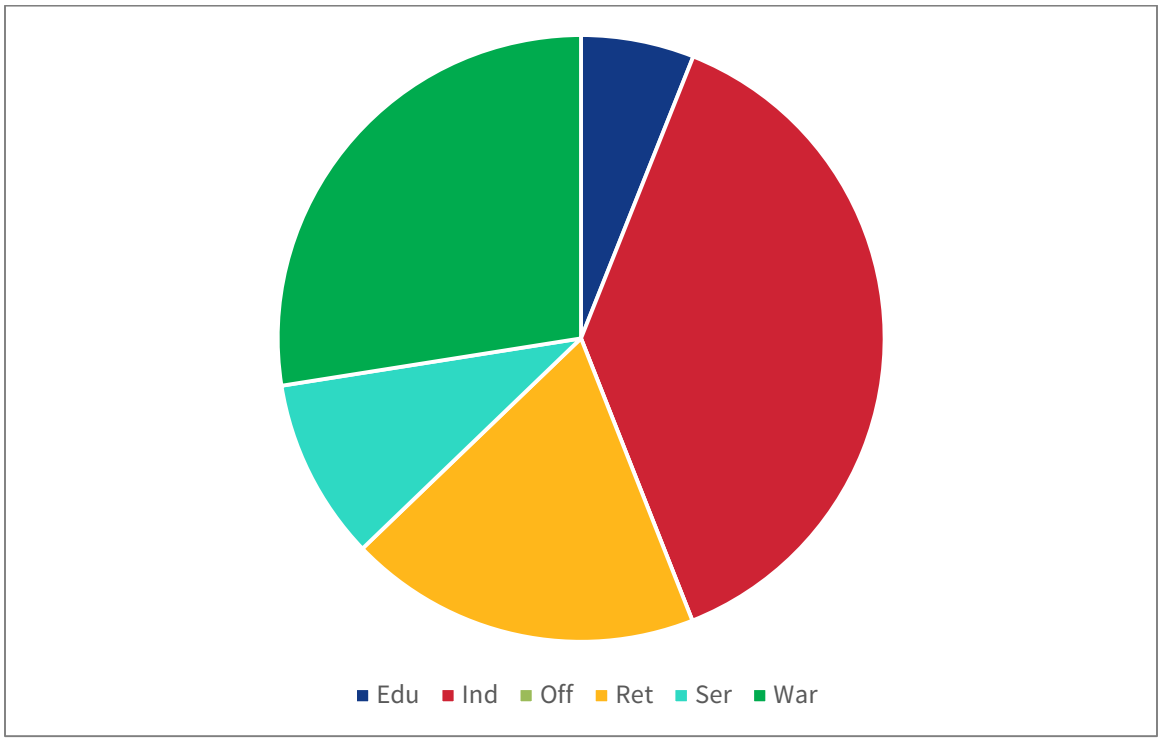


Figure 6-7: Non-residential development activity in designated Employment Lands by job type, Northwest quadrant 2020-24

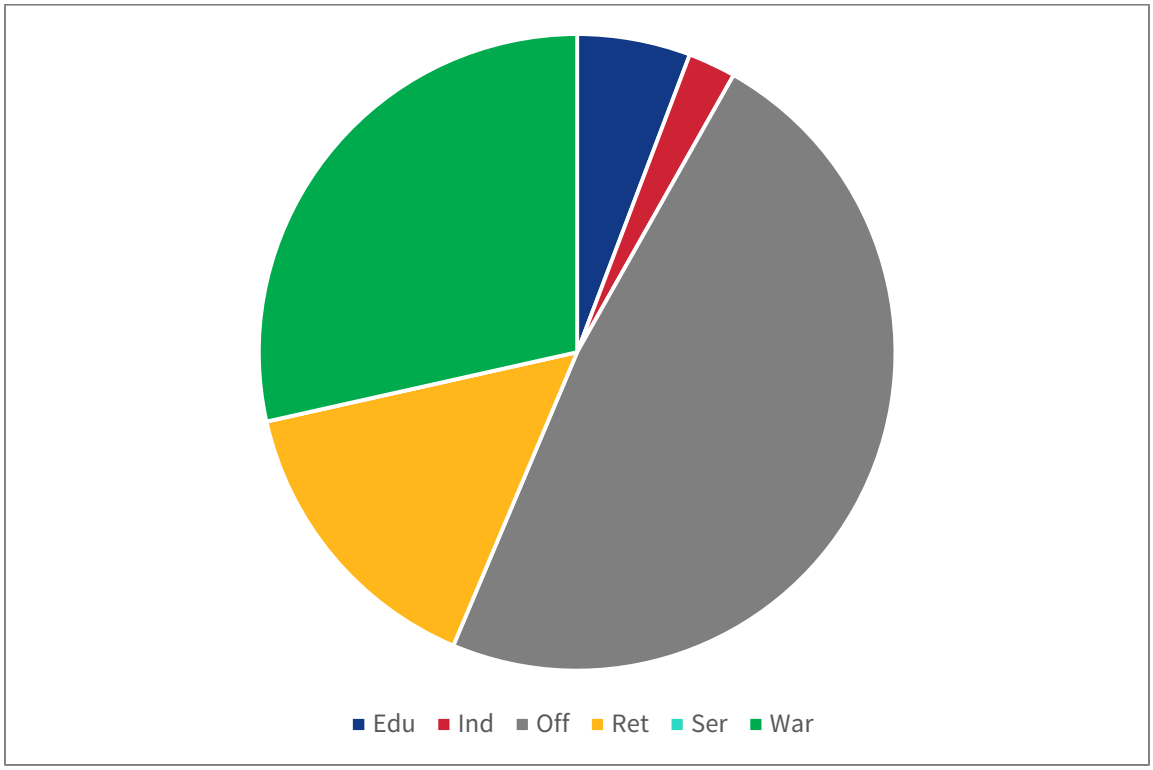


Figure 6-8: Non-residential development activity in designated Employment Lands by job type, Southwest quadrant 2020-24

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	2020	2021	2022	2023	2024	2020-24 avg
East	48%	17%	43%	36%	36%	37%
Northwest	21%	79%	54%	51%	43%	49%
Southwest	31%	4%	3%	14%	21%	14%

Figure 6-9: Non-residential development activity in designated Employment Lands by quadrant, 2020-24, as share of total estimated jobs

Quadrant	2020	2021	2022	2023	2024	2020-24 avg
East	57%	19%	43%	37%	44%	41%
Northwest	30%	78%	53%	50%	40%	50%
Southwest	14%	4%	4%	14%	16%	9%

Figure 6-10: Non-residential development activity in designated Employment Lands by quadrant, 2020-24, as share of total building floor area

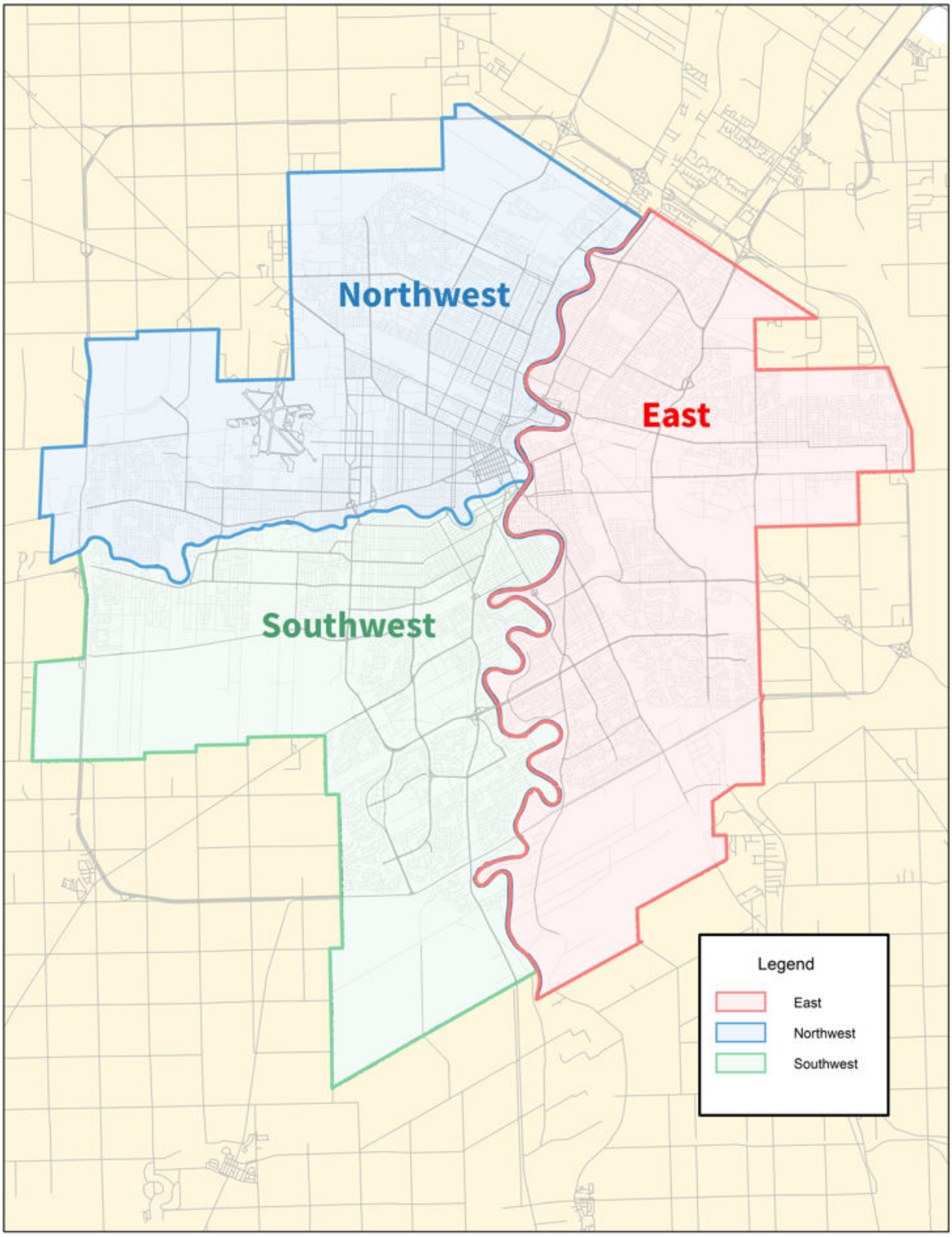


Figure 6-11: Quadrants used for measuring non-residential development activity

6.2 Industrial Absorption

The last five years saw an annual average of 61 acres (25 hectares) of vacant industrial-zoned land[1] absorbed[2] in the City of Winnipeg, with a low of 31 acres (12 hectares) in 2024 and a high of 88 acres (36 hectares) in 2023. During this time period, 154 acres (64 hectares) were absorbed in the Northwest quadrant, followed by 124 acres (50 hectares) in the East and 35 acres (14 hectares) in the Southwest. There is a high level of variability year-over-year. Industrial absorption in 2024 consisted of four projects.

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)
2024	11 (4)	5 (2)	15 (6)	31 (12)
2020-24 total	**157 (64)**	**124 (50)**	**35 (14)**	**304 (123)**
2020-24 avg.	**31 (13)**	**25 (10)**	**7 (3)**	**61 (25)**

Figure 6-12: Absorption of vacant industrial-zoned land, in acres (hectares in parentheses), 2020-24[3]

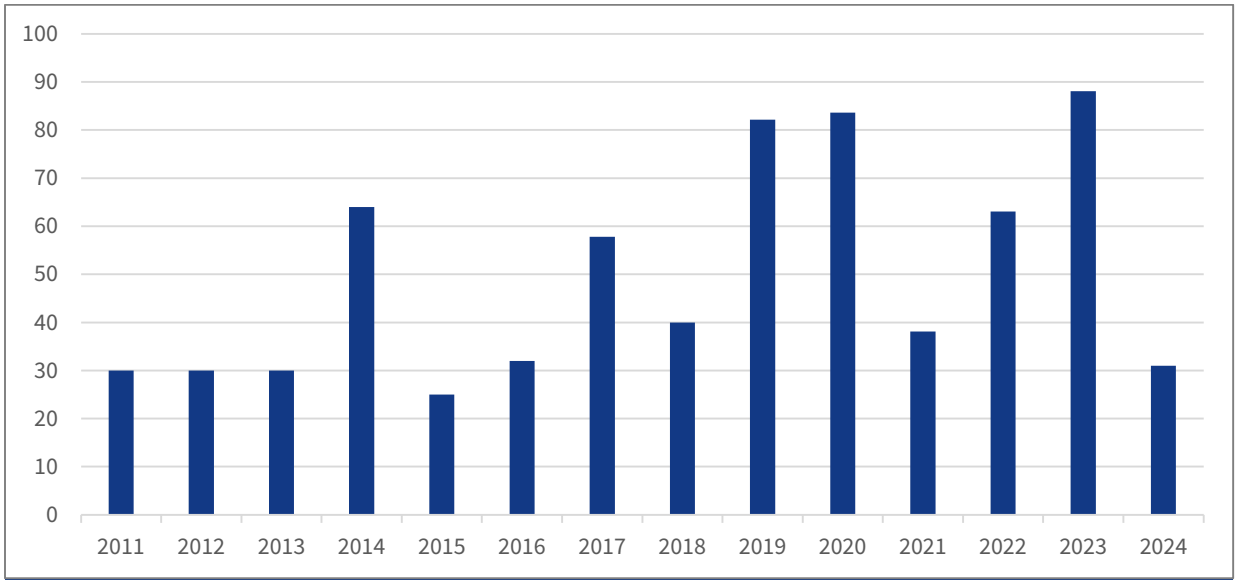


Figure 6-13: City-wide absorption of vacant industrial-zoned land, in acres, 2011-2024

[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

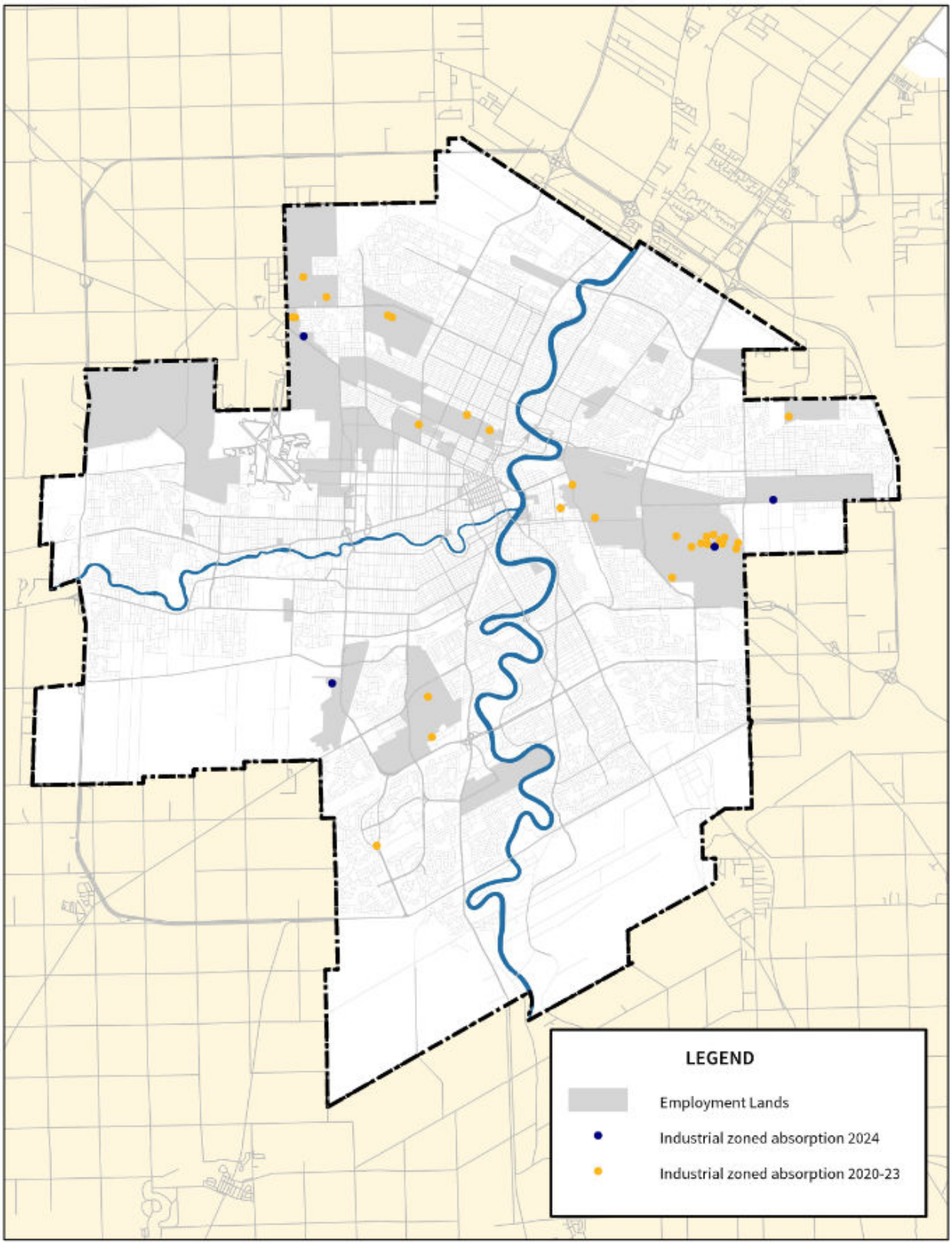


Figure 6-14: Industrial-zoned absorption, 2020-2024

In the past, some stakeholders have expressed concern that the City's approach in quantifying absorption, whereby large sites are considered 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 6-15 below, 195 Haggart Ave, illustrates the difference in these two approaches. Under the first approach, the full area in orange was 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 absorbed. These two approaches can result in significantly different results.

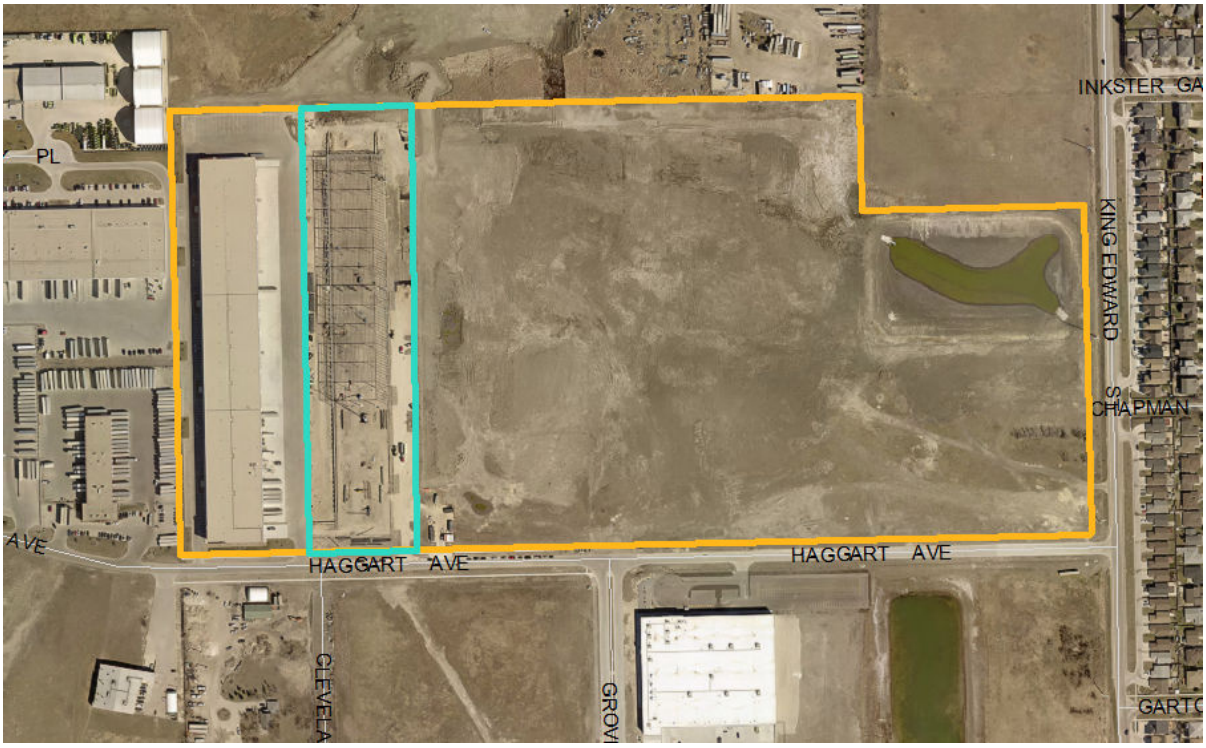


Figure 6-15: Illustration of this report's approach to absorption (orange) vs adjusted absorption (teal)

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)
2024	31 (13)	23 (9)

Figure 6-16: City of Winnipeg absorption vs "adjusted absorption", 2020 to 2024, 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 6-18. 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 6-16 above, as they were not prepared using the adjusted methodology.

Municipality	Annual avg. in ac (hc)		Land absorbed in ac (hc)			Serviced with piped water and sewer
	2011-16	2017-20	2021	2022	2023	
City of Wpg	35 (14)	66 (27)	38 (15)	63 (26)	88 (36)	Serviced
East St Paul (Wenzel)	0 (0)	0 (0)	5 (2)	11 (5)	0 (0)	Unserviced
Headingley	10 (4)	25 (10)	30 (12)	27 (11)	21 (9)	Serviced
Macdonald	7 (3)	9 (4)	10 (4)	10 (4)	4 (2)	Serviced
Rosser	22 (9)	41 (17)	87 (35)	41 (17)	42 (17)	Serviced
Springfield	7 (3)	13 (5)	13 (5)	2 (1)	11 (4)	Not serviced
West St Paul	3 (1)	7 (3)	11 (5)	0 (0)	0 (0)	Kapelus Rd is serviced, while others are not

Figure 6-17: Industrial land absorption, City of Winnipeg and Capital Region employment areas, 2017-23, in acres (hectares in parentheses)

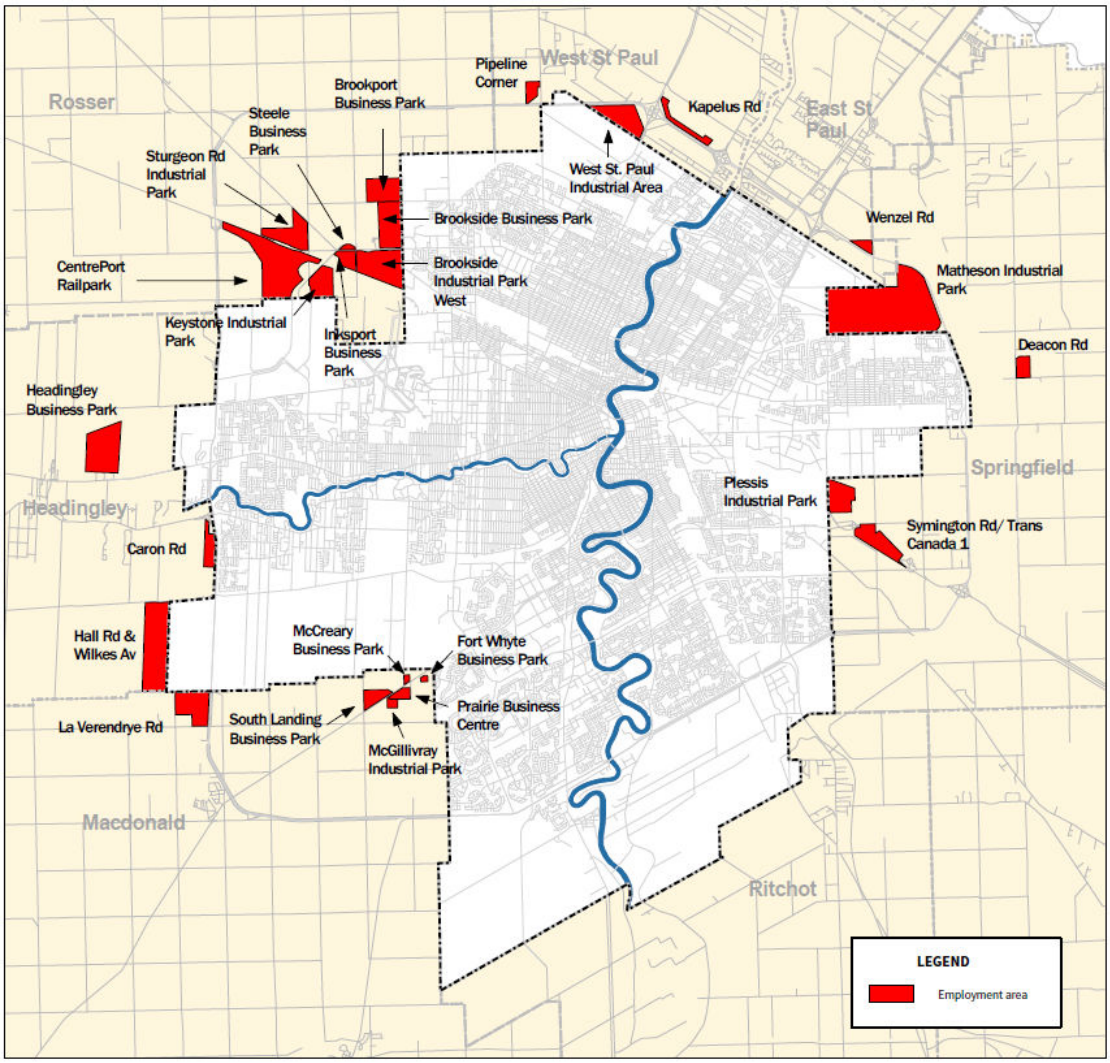


Figure 6-18: Selected Capital Region employment areas adjacent to the City of Winnipeg

2023 saw the City assume its highest share of select Capital Region absorption dating back to 2011, though a high level of volatility is observed year-over-year.

Jurisdiction	Land absorption									
	2011 to 2016[1]		2017 to 2020		2021		2022		2023	
	Ac (hc)	%	Ac (hc)	%	Ac (hc)	%	Ac (hc)	%	Ac (hc)	%
City of Wpg	213 (86)	35	264 (107)	41	38 (15)	20	63 (26)	41	88 (36)	53
Selected Capital Region	395 (160)	65	379 (153)	59	156 (63)	80	91 (37)	59	78 (32)	47
Total	608 (246)	100	643 (260)	100	183 (74)	100	154 (62)	100	166 (67)	100

Figure 6-19: 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.

7.0 Non-Residential Land Supply

7.1 Industrial Land Supply

As described in Section A.2, this analysis considers several categories of industrial land supply. All told, it identified 276 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, 2025. Based on the Employment Land demand analysis prepared for the Winnipeg Metropolitan Region's Plan 20-50, this translates to approximately five 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 7-1 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 (net ac)	Intensification potential
		Shovel-ready, unencumbered	Locally unserviced[4]		
Supply	Net supply (ac)	276	567	2,666[5]	831
Forecast	Land need, 2025-51 (ac)	1,679			
	Shortfall	-1,403	-1,169	+988	n/a
	Years supply	4.9	9.1	47.6	14.9

Figure 7-1: Estimated vacant industrial land supply, City of Winnipeg, as of January 1, 2025

Decreases from last year can be attributed to industrial land absorption and supply refinement.

[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.

[5] Increase from the 2024 report attributable to error correction.

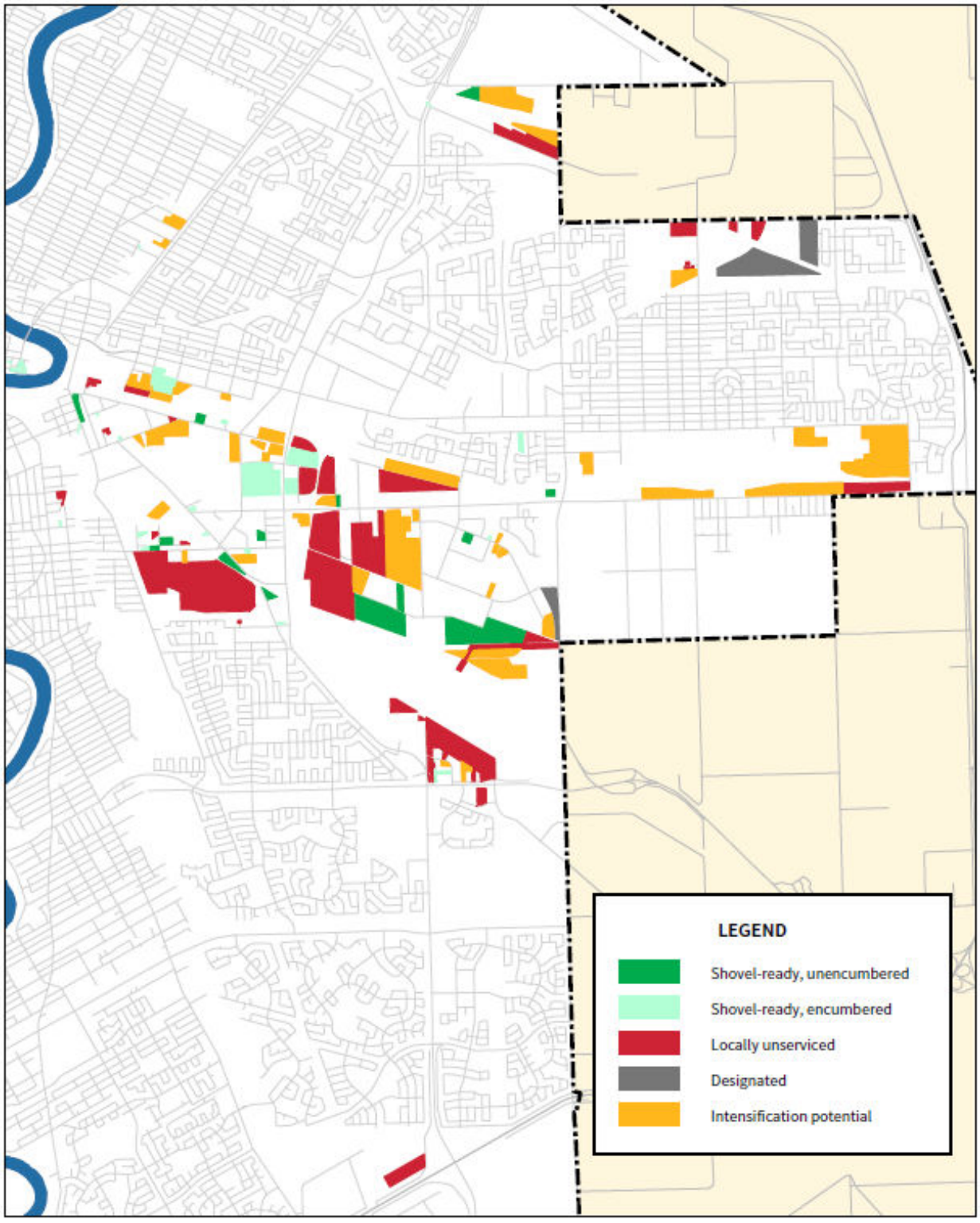


Figure 7-2: Map of estimated vacant industrial land supply, City of Winnipeg East quadrant, as of January 1, 2025

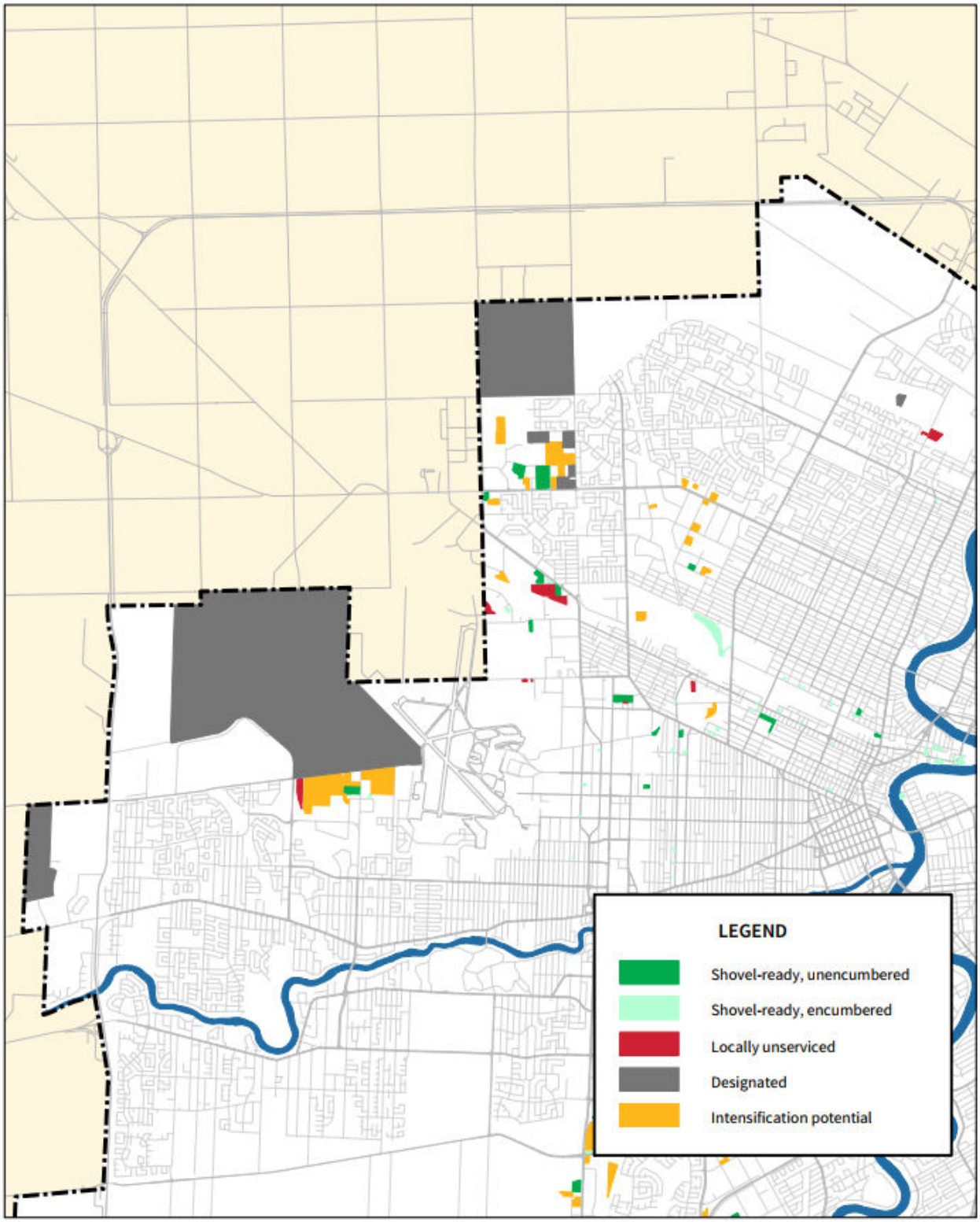


Figure 7-3: Map of estimated vacant industrial land supply, City of Winnipeg Northwest quadrant, as of January 1, 2025

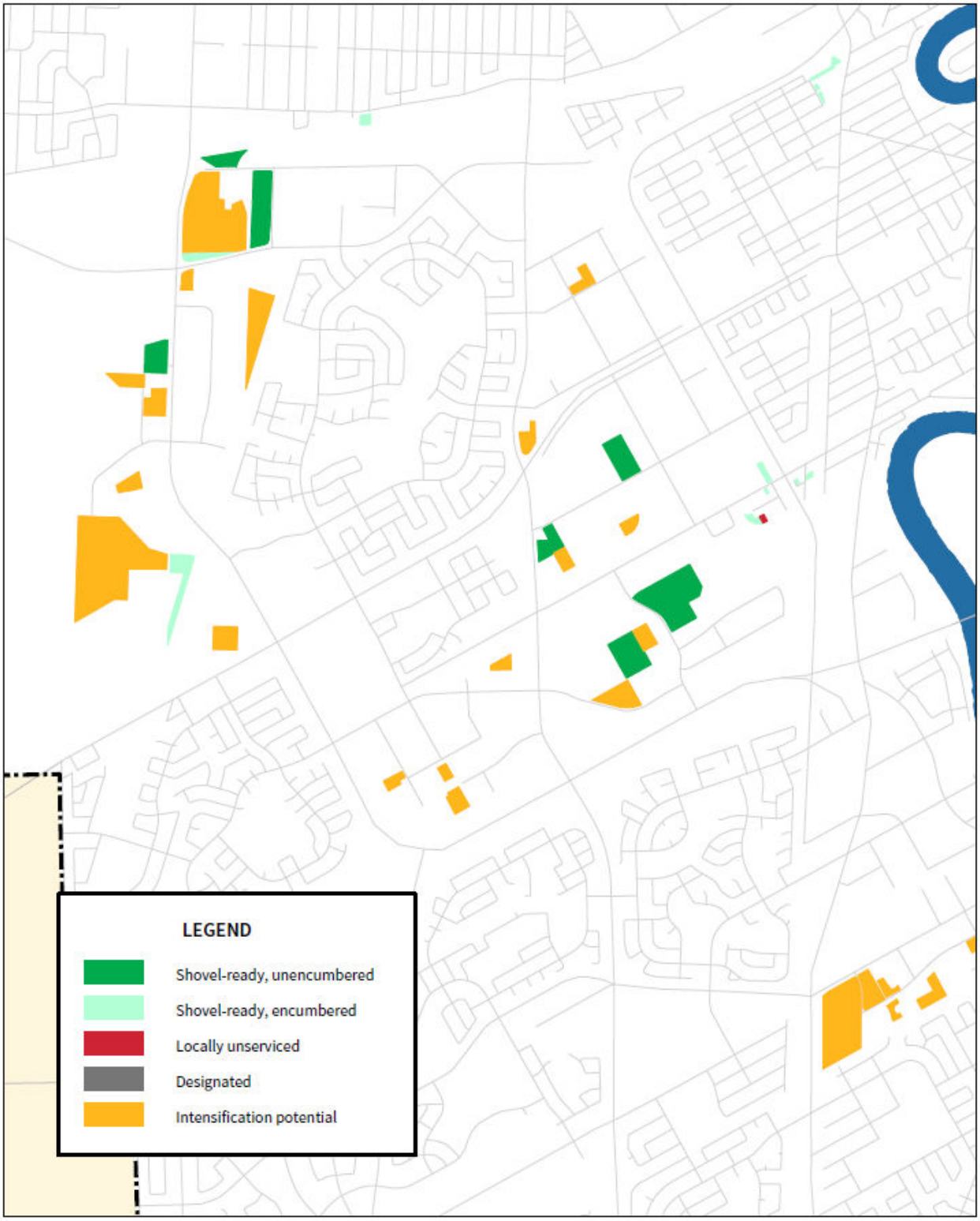


Figure 7-4: Map of estimated vacant industrial land supply, City of Winnipeg Southwest quadrant, as of January 1, 2025

These supplies are reduced as one considers site size and quadrant. Regarding quadrant, the majority of the City's existing 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	216	454	n/a	700
Land area on sites > 10 ac	136	339	n/a	576
East quadrant	133	504	62	442
Northwest quadrant	77	62	2,255	207
Southwest quadrant	65	0	0	182

Figure 7-5: 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. These sites represent the areas with the largest existing industrial land supplies.

Sites	Regionally serviced		Intensification potential
	Shovel-ready, unencumbered	Locally unserviced	
All emerging sites	150	218	182
Cavalia Lands	16	0	35
Inksbrook	30	0	75
Public Markets	0	73	2
St Boniface Industrial	104	145	71
Smart Park	0	0	38

Figure 7-6: Estimated vacant industrial land supply within identified industrial emerging sites

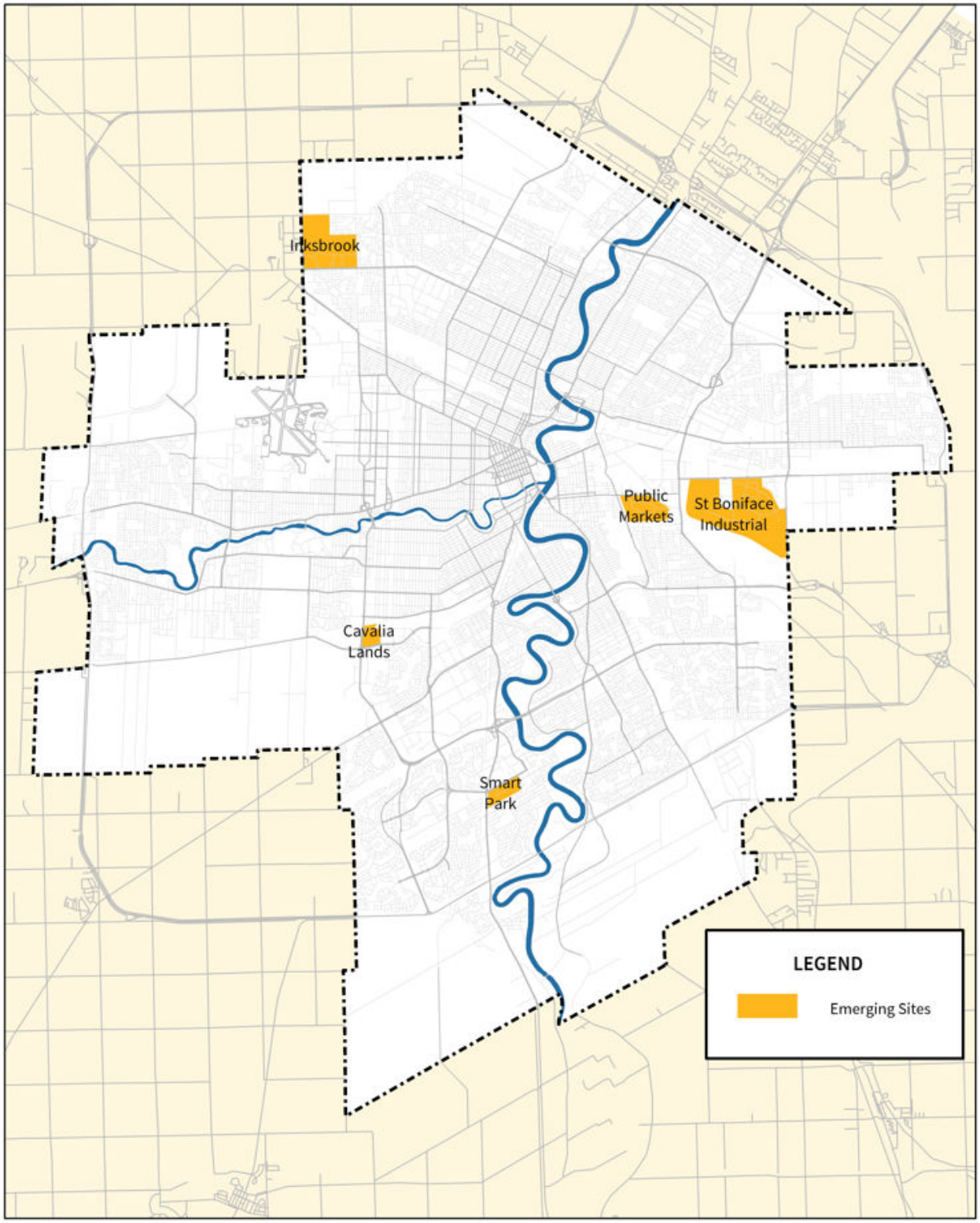


Figure 7-7: Identified industrial Emerging Sites

Previous reports have provided comments on the nature of this supply. While at first glance this supply may seem reasonable, these numbers fail to tell the full story as they relate 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 MoodysCRE.com for vacant industrial lots for sale in both the City of Winnipeg and adjacent rural municipalities at a point in time. 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.

Municipality	Serviced with piped water and sewer	April 22, 2024		March 31, 2025	
		Land for sale (ac)	Avg. price per acre[1]	Land for sale (ac)	Avg. price per acre
Headingley	Serviced	83	$303k	76	$336k
Macdonald	Serviced	40	$485k	56	n/a
Rosser	Serviced	None	None	137	$853k
Springfield	Not serviced	18	$226k	158	$309k
West St Paul	Serviced in part	5	$399k	None	n/a
Winnipeg - Northwest	Serviced	7	$466k	None	n/a
Winnipeg – East	Serviced	49	$378k	30	$478k
Winnipeg - Southwest	Serviced	39	$813k	None	n/a

Figure 7-8: Available vacant industrial land for sale as per CommercialExchange.com, as of March 31, 2025

Additional consideration of City-owned sites is warranted. Cities often own vacant industrial land to facilitate economic development opportunities. As of February 14, 2025, there is 80 acres of vacant serviced industrial land available for sale in the St Boniface Industrial Park. These lands would be considered shovel-ready.

[1] Average based only on properties where price per acre was listed.

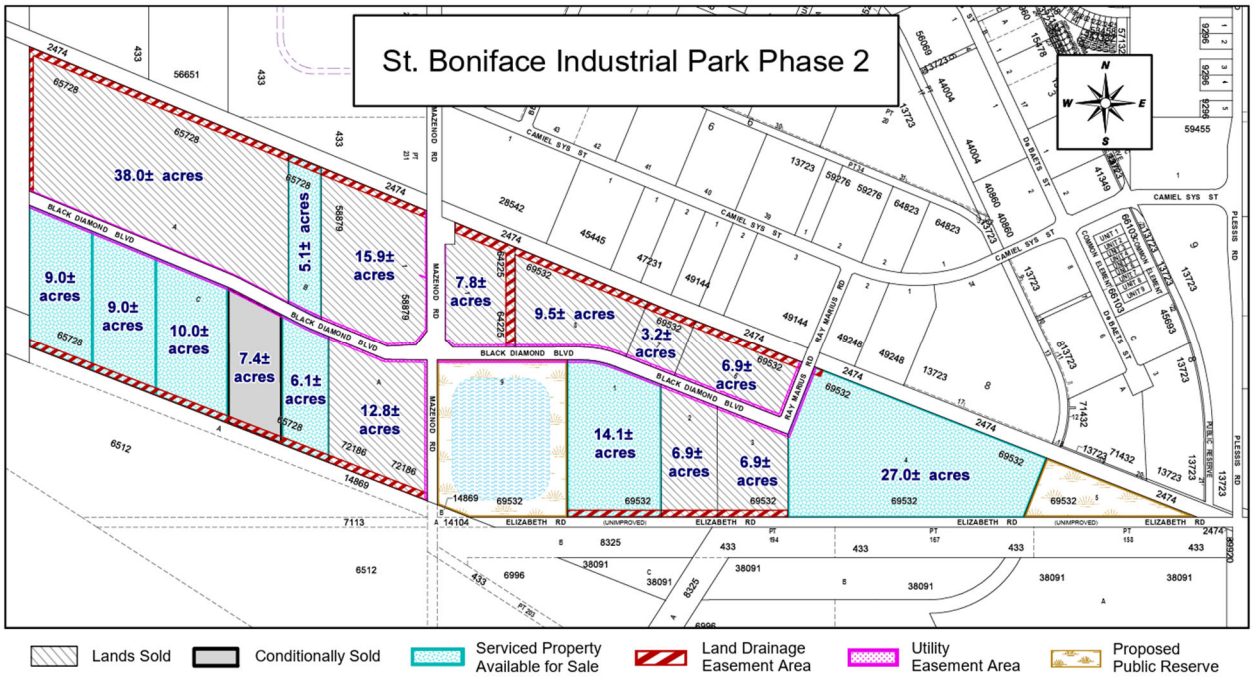


Figure 7-9: Available City-owned vacant industrial land for sale as of February 14, 2025

Industrial land supply in the City of Winnipeg has been relatively stagnant, with little change year-over-year. Over the last five years, Council has only approved two subdivision and rezoning applications creating new lots intended for industrial development – DASZs 30/2020 and 13/2020 in the Public Markets and St Boniface Industrial emerging sites, respectively. Over the last three years, the City's estimated supply of unencumbered, shovel-ready, vacant industrial land has declined slightly from 5.6 to 4.9 years. This is expected to change following the installation of regional water and wastewater services in CentrePort South, which is currently expected in 2026. The Public Service has been working with area landowners in anticipation of future development applications. Until services are installed in this area, the City's industrial land supply should be considered constrained. Future phases are unfunded.

It should also be noted that the City's future industrial land supply is geographically imbalanced. As described in Figure 7-5 above, most of the existing supply (i.e. existing shovel-ready) is in the East quadrant, while most of the future supply (i.e. designated) is in the Northwest, with very little existing or future supply in the Southwest. Future planning processes such as sector plans and the upcoming OurWinnipeg review should consider expanding opportunities for future industrial development across the City to meet user demand for specific quadrants. On December 12, 2024, Council affirmed this in part by encouraging the identification of Employment Lands in future plans for the St Vital Perimeter South, St Norbert, and the Wilkes South sectors.

7.2 Commercial Land Supply

This analysis identified a vacant commercial land supply of 542 acres (219 hectares) as of January 1, 2025. 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 348 ac (141 ha) to 2041, this represents approximately 25 years of supply, which is in line with previous year's reporting. Modest rates of absorption combined with limited new commercial rezonings over recent years have resulted in a fairly static commercial land supply.

	2024	2023	2022
Total commercial supply, ac (ha)			
Vacant commercial-zoned	307 (124)	330 (134)	360 (146)
Approved but non-vested in RMU Centres and Emerging Sites	176 (71)	172 (70)	172 (70)
Cont'd build-out in RMU Centres and Emerging Sites	47 (19)	52 (21)	49 (20)
Total	542 (219)	554 (224)	578 (234)
Forecasted demand to 2041, ac (ha)			
Forecasted demand	348 (141)	370 (150)	392 (159)
Shortfall/surplus	+194 (79)	+184 (75)	+189 (77)
Forecasted annual absorption	22 (9)	22 (9)	22 (9)
Years supply	25 years	26 years	27 years

Figure 7-10: Commercial supply and forecasted demand as of January 1, 2025, and compared to previous years

While total vacant commercial-zoned supply decreased slightly from last year, other supply categories saw small increases. As previously vacant lots were absorbed at less than 25% lot coverage, this has shifted the supply towards increased opportunities for intensification. Notable supply changes include the following:

- Absorption of land previously identified as vacant in Seasons of Tuxedo (Structube), 255 Centre St in Bridgwater Town Centre (for mixed use residential), and 1530 Warde Ave (for residential);
- Addition of new supply through finalization of approved subdivisions and/or rezonings, such as at the northeast corner of McPhillips and Ferrier (DASZ 25/2022), and the northwest corner of Waverley and Lee (DASZ 43/2019);
- Loss of supply through Council approval of DASZ 29/2023, which saw the northwest corner of Kenaston and Waverley rezoned for residential uses;
- Increases and decreases in supply resulting from refined mapping, including the removal of vacant properties that were being used as parking for adjacent uses.

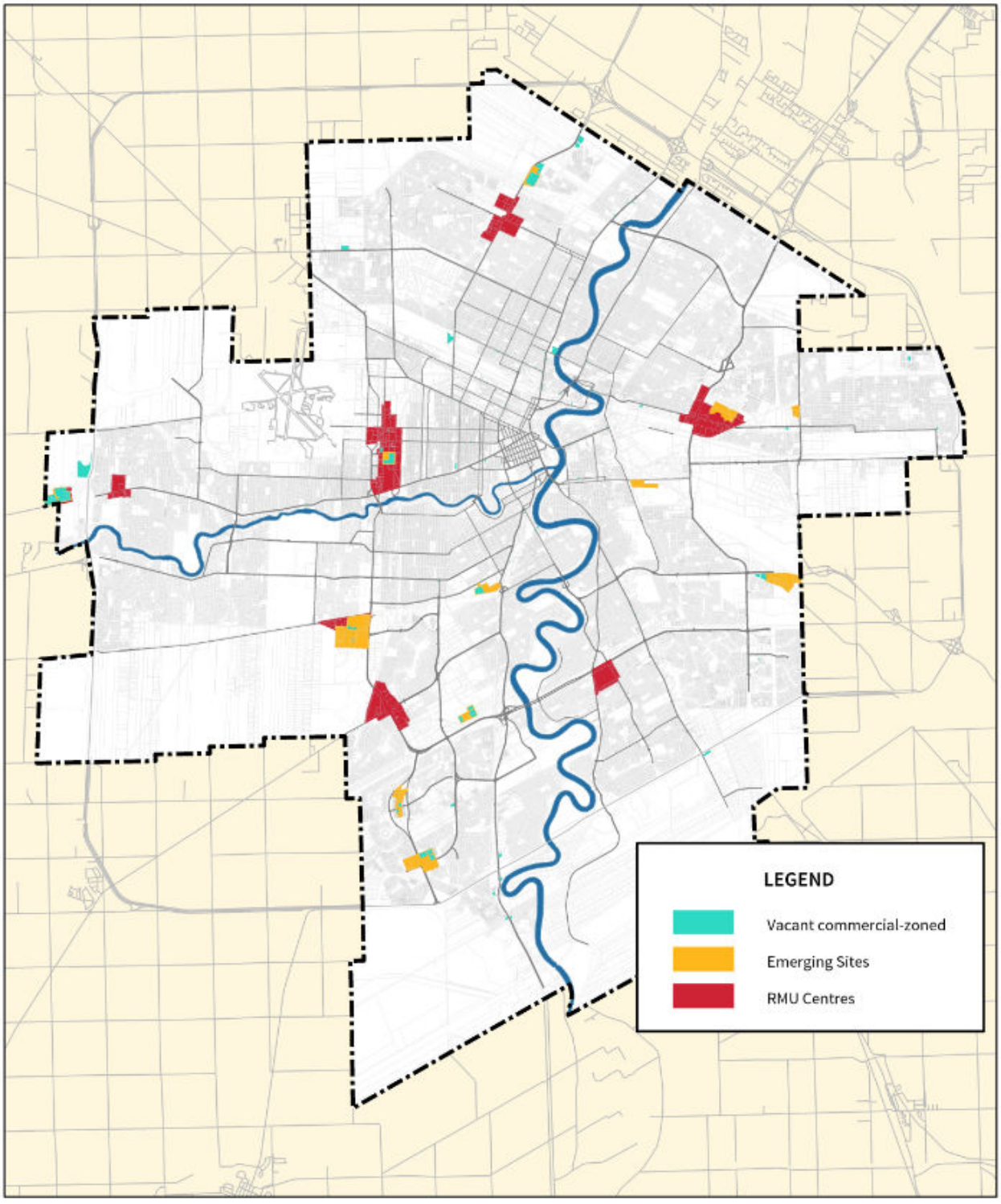


Figure 7-11: Map of commercial supply

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	158 (64)	176 (71)	n/a	47 (19)
Old Stadium site	16 (7)	-	0.14	0 (0)
Outlets of Tuxedo[4]	5 (2)	-	0.22	4 (2)
Precinct J	0 (0)	81 (33)	0.00	-
Precinct F	26 (11)	-	0.02	5 (2)
Public Markets	0 (0)	22 (9)	0.00	-
Ravelston-Plessis	0 (0)	-	0.19	3 (1)
Reenders	0 (0)	27 (11)	0.00	-
Seasons of Tuxedo	1 (0)	-	0.18	22 (9)
Sugar Beets	15 (6)	-	0.04	5 (2)
Taylor Lands	11 (5)	-	0.13	7 (3)
Waverley West South Pointe	18 (7)	47 (19)	0.02	1 (0)
Waverley West Town Centre	4 (2)	-	0.27	0 (0)
Westport Festival	62 (25)	-	0.00	-
Regional Mixed Use Centres	66 (27)	n/a	n/a	12[5] (5)
Kenaston-McGillivray	0 (0)		0.24	9 (4)
McPhillips-Leila	0 (0)		0.27	0 (0)
Polo Park	20 (8)		0.34	0 (0)
Regent-Lagimodiere	0 (0)		0.26	0 (0)
Seasons of Tuxedo	6 (2)		0.24	~~7 (3)~~
St Vital	0 (0)		0.30	0 (0)
Unicity	0 (0)		0.24	3 (1)
Westport Festival	40 (16)		0.02	~~3 (1)~~

Figure 7-12: 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.

Previous reports have commented on the continued persistence of an oversupply of commercial land first identified in the *2018 Employment and Commercial Lands Study*. These conditions continue. This is expected to result in, "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", as the study noted. 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]. These conditions are also likely to result in continued residential development in commercial-zoned areas, which should facilitate intended development in the Malls and Corridors Planned Development Overlay (PDO) (see Section 4.6).

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

8.0 Growth Management

8.1 Potential Challenges to 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 more than the 50% target are forecasted to continue based on existing development trends, this is not guaranteed. From issues related to servicing, market limitations, land assembly, context-sensitive design, uncertain approvals processes, and financing, infill development is faced with potential challenges on several fronts, many of which are outside the City's control. Without continued measures to facilitate it, it is expected that infill will become increasingly difficult as the City depletes its supply of easier-to-develop sites. To this end, the above targets are minimums that establish a floor, not a ceiling.

Looking ahead, the City should anticipate potential obstacles to achieving the intensification target and proactively plan to overcome them, focusing on what is within its control. Potential challenges in the short, medium, and long term may include the following.

Short term

In the short term, city-wide infill and greenfield growth may be constrained by the City's remaining biosolids treatment capacity. All sludge (a product of wastewater treatment) generated in the city is sent to the biosolids facility at the North End Sewage Treatment Plant (NEWPCC). In 2024, the Public Service reported that the biosolids facility was expected to reach capacity in four to six years. It is estimated that there's approximately 60,000 people equivalent of capacity remaining. The second project of the NEWPCC upgrades, a new biosolids facility, is approved and funded and is expected to be in operation late 2030. The Public Service will continue to provide annual updates to Council on remaining biosolids capacity.

In recent years, communities across Canada, including Winnipeg, have faced increasing social and economic challenges as well as heightened barriers to stability and support. Challenges related to housing affordability, persistent poverty, growing mental health and addictions

[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.

concerns, and the ongoing impacts of toxic drug use have contributed to greater instability and visible signs of social distress in many neighbourhoods, particularly in central areas of the city. This may dampen the desirability for housing in these areas. These complex needs will need to be addressed not only before the City's land use and development aspirations can be fully realized, but to ensure all residents can thrive in a more inclusive and equitable city.

As discussed in Section 4.3, higher intensification rates since 2018 have been boosted by an acceleration of multifamily development during this time, fueled by historically high rates of international immigration. The most recent 2025-2027 Immigration Levels Plan released by Immigration, Refugees, and Citizenship Canada points towards lower permanent immigration targets and significant net reductions in temporary residents during this time, signaling the federal government's intention to slow population growth in response to housing affordability issues and elevated concerns about the number of permanent residents in the country. Decreasing levels of immigration will slow housing starts, particularly multifamily starts that drive infill activity.

Housing construction costs remain high, which increases rent. Meanwhile, interest rates have moderated from the highs of recent years, which has reduced the tradeoff for purchasing a ground-oriented dwelling, lowering demand for intensification.

Medium term

Over time, more local servicing capacity issues constraining infill development can be expected. The Public Service is planning to address this by undertaking serviceability studies, as identified in the RAMS study described in 8.1, to better understand local infrastructure needs in infill areas. It is also currently looking at amendments to the Development Agreement Parameters that would address more equitable cost sharing of upgrades, in consultation with industry.

The South End Sewage Treatment Plant (SEWPCC) may reach capacity in the early 2030s. The Water and Waste Department (WWD) will be reviewing remaining available capacity beginning in 2026. The study will include identifying any constraints to development and options to mitigate those constraints. Insufficient wastewater treatment capacity would inhibit the City's ability to accommodate both infill and greenfield growth in the south end of the city.

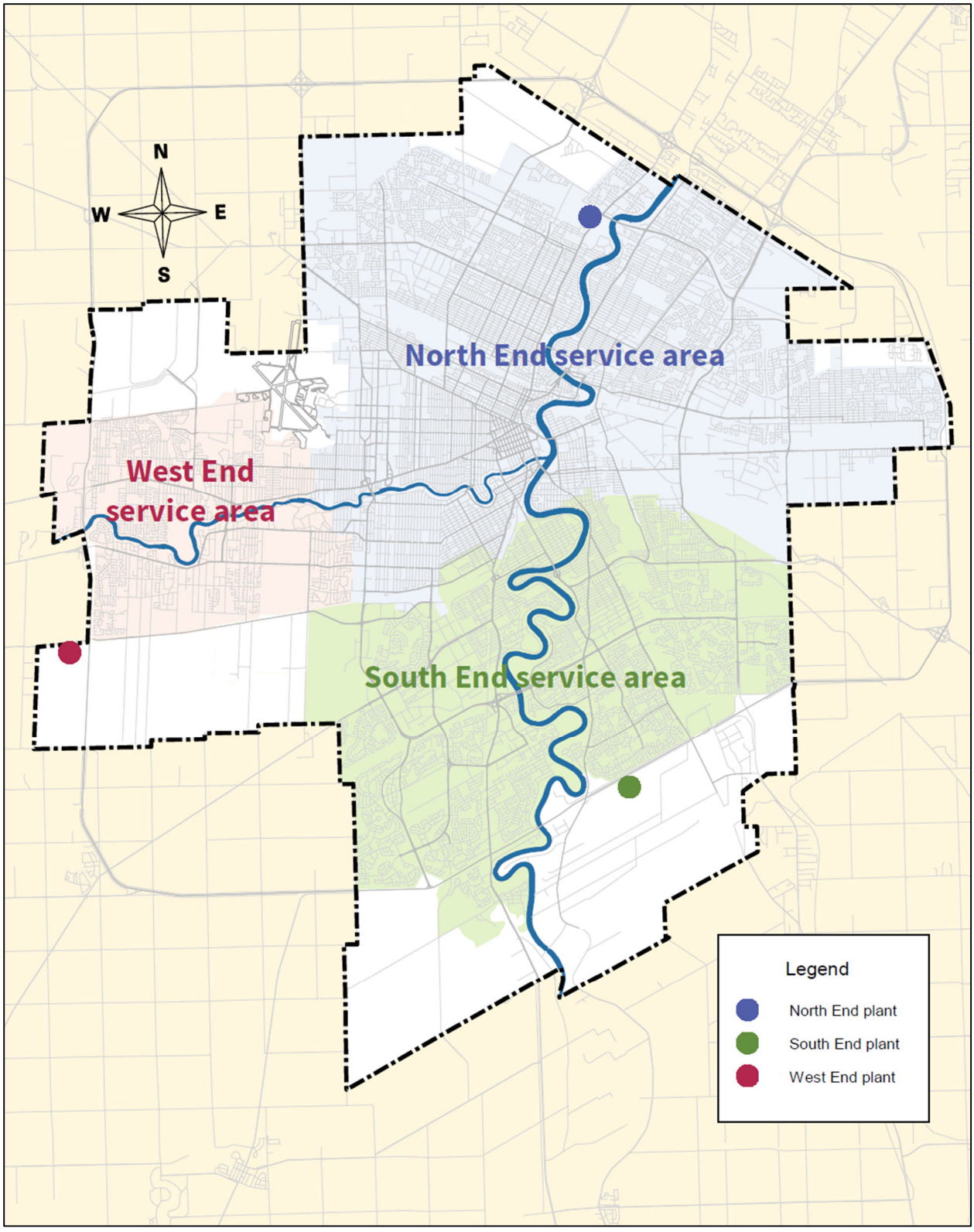


Figure 8-1: Sewage treatment plant service areas

Currently, much if not most multifamily residential projects rely on favourable financing terms provided by Canada Mortgage and Housing Corporation's (CMHC) MLI Select mortgage loan insurance. The disappearance of such programs would strike a significant blow to multifamily development, particularly in more challenging infill scenarios.

There is currently significant political capital being spent towards improving housing affordability, including market housing. Improved affordability could shift the market from infill to greenfield units as buyers gain more income to access larger, more ground-consumptive dwelling types (from apartments to rowhouses, rowhouses to semi- or single-detached dwellings, etc.).

Since 2021, the City of Winnipeg has grown by over 71,000 people which, on an annual basis, is more than double typical annual growth observed between 2010 and 2019. Given that this rate of growth is not expected to continue, this cohort is uniquely large. It is predominantly young, in their 20s and early 30s. As they age, the desire for family-oriented housing (3+ bedrooms) will increase, leading to demand for greenfield dwelling units and inversely impacting the intensification rate on a percentage basis.

Long term

Over the next 20 years, there are quite a few large infill sites with the potential to accommodate significant growth, such as designated Major Redevelopment Sites Naawi-Oodena (former Kapyong Barracks), Southwood Circle at the University of Manitoba, and Fulton Grove (Parker Lands), that can help carry a higher intensification rate. However, as these sites build out, the City will need to be proactive in identifying other opportunities and overcoming constraints. Possible solutions may include a brownfield strategy to maximize the developability of land in the city.

Sections 8.3 and 8.4 describe anticipated growth-related infrastructure for future greenfield development. This infrastructure will be challenging to fund over the next 20 years. If greenfield land is not serviced, the intensification rate would increase on a percentage basis, though overall housing needs would not be met.

8.2 Achieving the Intensification Target

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

Tool	Initiative	Description
Development regulations	Rapid zoning bylaw amendments	Since the beginning of 2024, Council has approved three rounds of rapid zoning bylaw amendments to improve permit processing and accelerate housing. Earlier phases saw Council introduce development permit exemptions on minor construction projects (February 22, 2024[1]), encourage as-of-right infill housing options (May 30, 2024), and introduce a Planned Development Overlay (PDO) to facilitate as-of-right development in mall sites and along designated Corridors (November 21, 2024). More recently, Council approved amendments to the Winnipeg Zoning By-law No. 200/06 to allow for as-of-right development of new two-, three-, and four-unit residential dwellings (June 5, 2025). Most of these initiatives 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. Most recently, the City has implemented its program by: - Conditionally approving a second round Capital Grant Incentive program projects. Round Two projects are expected to create 1,418 new units in 12 projects, including 633 affordable units. All units are located within the Intensification Target area. - Supporting the pre-development of four priority City-owned sites for mixed-income housing. The developments will lead to the construction of approximately 696 new dwelling units, including 272 affordable units. All units are located within the Intensification Target area. - Launching the $12m Multi-Family Sustainable Housing Infrastructure Program to provide developers with funding to help cover the costs of local water, wastewater, and land drainage infrastructure to support the construction of high density multifamily development in areas where current infrastructure cannot otherwise accommodate it.

[1] Dates of initial Council approval - changes came into effect at later dates.

Tool	Initiative	Description
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 under the Heritage and Economic Development Incentive program enabling residential and supportive commercial development over the last year: - A grant of up to $228k over ten years to enable the construction of 31 new dwelling units and adaptive reuse of a heritage building at 210 Rue Masson. The project will include measures to preserve and restore character-defining elements and code upgrades necessary to achieve occupancy. - A grant of up to $535k over ten years to enable the construction of 54 new dwelling units at 228 King St and 231 Princess St, including 14 units with rent levels at less than 80% of median market rent levels for the area, and 14 with rents geared to income. - A grant of up to $1m over ten years to enable the redevelopment of a downtown surface parking lot and construction of 128 new dwelling units at 346 Pacific Ave, including 38 affordable units. - A grant of up to $1m over ten years to enable the development of 87 new rental units at 120 and 128 James Ave. The project will see development on top of an existing heritage building and the redevelopment of an existing adjacent building.
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. - The Affordable Housing Now program continues to administer Tax Increment Financing and Capital Grant funding to multifamily housing projects that include affordable housing, with priority given to projects Downtown and in Winnipeg's five Housing Improvement Zones (HIZs), all of which are located in the Intensification Target area. As of February 2025, the $50m Affordable Housing Now program budget has been fully subscribed. Twenty-seven projects in the Intensification Target area have received conditional approval and are expected to provide 2,181 new dwelling units, including 878 affordable units and 366 deeply affordable units.

Tool	Initiative	Description
		- 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 2025 Budget.
Infrastructure	Active transportation	In its 2025 Budget, Council allocated $2.2m to the Pedestrian and Cycling Program. This figure compares to a 2020-24 annual average of $2.6m and a planned average of $7m from 2026-30. Also of note is that the budget has allocated $1.1m over 2025 and 2026 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 plant	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 project, "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 project, "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 construction is planned to begin in 2025, with the main construction set to begin in 2026.

Tool	Initiative	Description
		The planned third project of sewage treatment plant upgrades is partially funded at $29m, with an estimated total cost of $1.49b as of 2025. In 2025, the City issued a Request for Proposal to engage a development partner for the project's progressive design build.
Infrastructure	Streetscaping and public realm improvements	A number of public realm improvements Downtown have recently been completed or are nearing completion, including: - A pilot placemaking initiative along Graham Ave; - A fitness trail in Stephen Juba Park; - Redevelopment of Odeon Park, including expansion into part of the public right-of-way; - Renewal of Air Canada Park; - Site development work associated with the Market Lands development; and - Sidewalk improvements along Galt St. Funding has also been allocated to the planning of future design work, including Broadway renewal and the revitalization of the Alexander Docks in partnership with the Forks. The 2025 Adopted Budget also allocated $151k to the Downtown Enhancement Program ($527k is planned for 2026 to 2030, compared to $565k over the last five years), and $200k to the Business Improvement Zones, Image Routes, and Neighbourhood Main Streets Program ($200k is planned for each of the next five years, compared to an annual average of $80k over the last five). The 2025 Budget also allocated $5.05m, with an additional $7.05m forecasted over the next two years, to support public space improvements associated with the Portage Place redevelopment. This will include the extension of Edmonton St north of Portage Ave to the Promenade as well as improvements on nearby streets.
Infrastructure	Transit improvements	The Primary Transit Network and Feeder Routes, one of the main components of the 2021 *Winnipeg Transit Master Plan* (WTMP), was launched on June 29, 2025. Implementation of the WTMP is a key transportation-related incentive to intensification. Towards this aim:

Tool	Initiative	Description
		- Council approved the final version of the Primary Transit Network Service Implementation Plan on March 27, 2025; - Two recently hired project managers are overseeing the design and construction of approximately $20m in infrastructure for PTN implementation through 2024-27; - The Bus Stop Placement and Design Guidelines and the On-Street Transit Infrastructure Prioritization process are being developed, standardizing transit infrastructure to inform current and future capital investment; and - A $7m budget is allocated over the next two years for developing a preliminary design and Class 3 cost estimate for Downtown rapid transit, including plans for Portage & Main and Union Station.
Infrastructure	Water main renewals	In 2024, 10.1 km of water mains were renewed in the intensification target area. Of this work, 9.7 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. In 2025, Council committed $250k for CentrePlan 2050 implementation, which largely consisted of a streetscaping pilot project on Graham Ave. The City is also working closely with CentreVenture on other actions, including creating incentives for residential development, supporting Housing Accelerator Fund (HAF) projects, and exploring a trilateral funding agreement for implementation. Council will considering funding for additional CentrePlan 2050 actions during future budget review processes.
Planning	North and South Point Douglas secondary plan	Work on a Point Douglas secondary plan is nearing completion. 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.

Tool	Initiative	Description
Planning	Review and Assessment of Municipal Servicing (RAMS) for Water, Sewer, and Land Drainage Development (formerly Capacity Study)	On May 2, 2025, Council received a report that identified process improvements to expedite the Water and Waste Department's reviews of water, wastewater, and land drainage capacities during the development process. It approved a rapid response process consisting of three key initiatives: 1. Standardizing the inquiry intake process; 2. Dedicated staff to enable accurate and timely review of inquiries; and 3. Establishing a fee for the inquiry service. Once implemented, target response times are expected to decrease from 30 days to seven days for standard, well-defined inquiries, and 14 days for more complex evaluations. The report also recommended additional staff to develop a regional wastewater model, conduct serviceability studies to better understand constraints and required improvements in priority infill areas, and to ensure the resiliency and sustainability of an enhanced level of service. Council approved funding for eight new positions and directed five additional positions to future Budget processes.

Figure 8-2: City initiatives that will help achieve the intensification target

8.3 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/or completion of local area planning. In the case of discrepancies between versions, 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 required capital budget investments, and the tax and rate-related implications, for 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). There is potential for some of the noted projects to be cost-shared with developers as per the Development Agreement Parameters.

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 and/or growth-enabling status. Project need may be pre-existing based on existing demand; however, where noted, it is expected that identified growth areas will increase this need. Benefiting areas are not limited to those that are noted; in most cases, identified projects would benefit a wide area, including many existing areas.

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 based on known traffic impact studies, the *Winnipeg Transportation Master Plan 2050*, and anticipated growth-related needs. Answers were based on forecasted land use and travel demand and existing known constraints in the transportation network.
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 8-3: 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 CCDS:

- The Public Service reviewed sites against existing traffic impact studies, known network constraints, and high-level modeling results. Consequently, quite a few new major road projects were added. Most notably, area improvements around Precinct D, B, Wilkes South, and St Norbert were added as growth-enabling infrastructure (to be confirmed through future analysis associated with precinct and sector plans), and additional growth-supportive projects were also added.
- In "Remainder of Precinct Q", Clement Parkway was described as terminating at Ridgewood Ave instead of Wilkes Ave, but would be accompanied by Wilkes Ave intersection improvements at Elmhurst Rd and Fairmont Rd.
- In South Transcona, "Share of Plessis widening" and "Share of Dugald widening" was moved to growth-enabling from growth-supportive infrastructure in anticipation that at least some of the precinct's build-out will be constrained in absence of these projects. This will be determined during the ongoing precinct planning process.
- In Precinct D, "Share of Northwest Wastewater Interceptor" was moved from growth-enabling to growth-supportive infrastructure. Though it will facilitate servicing of the area, it is expected that Precinct D will be able to develop without it. Future study will confirm this.
- In Airport Area West Residential (CentrePort South), it was clarified that the area may benefit from upgrades to the existing Northwest Wastewater Interceptor, not an extension of it into Precincts D, B, and A. The future scope of work may consist of both.
- "Share of" prefacing was removed. This was intended to communicate projects with a wider benefit beyond listed sites. However, its inclusion was felt to be redundant as this was applied to nearly every project.
- Project names and recommended years for detailed design and authorization have been changed to align with the most recent City infrastructure planning and budget documents.

	Short-to-medium term								Long term		
	AA West Residential (CentrePort South)	**Waverley West B**	**Precinct K South**	**Remainder Precinct Q**	**South Transcona**	**Fort Whyte**	**Precinct D**	**Precinct B**	**Wilkes South sector**	**St. Vital Perim. South sector**	**St. Norbert sector**
Quadrant	West	Southwest	Southeast	Southwest	Northeast	Southwest	Northwest	Northwest	Southwest	Southeast	Southwest
Potential Units	4,340	2,970	1,810	2,470	4,960	1,490	11,650	4,080	34,030	15,080	22,280
Precinct plan status	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required
Sector plan status	-	-	-	-	-	-	-	-	Sector plan required	Sector plan required	Sector plan required
Precinct plan priority	-	-	-	-	1	1	2	3	4	4	5
Sector plan priority	-	-	-	-	-	-	-	-	1	1	2
Servicing priority	1	1	2	4	2	2	3	4	5	5	6
Anticipated growth-enabling infrastructure	• CentrePort South Water and Sewer Servicing Phase 1A (funded) • Water and sewer servicing phases 1B+ • NW wastewater interceptor system upgrade	• Southwest interceptor (funded)	• Warde Ave extension (Lagimodiere to St Anne's)	• Clement Parkway (Grant to Ridgewood), including Elmhurst/Wilkes and Fairmont/Wilkes intersection improvements		• Southwest interceptor (funded)	• Chief Peguis Trail (2027) • McPhillips corridor improvements • Pipeline corridor improvements • McPhillips & Leila intersection improvements • Pipeline & Leila intersection improvements	• Chief Peguis Trail (2027) • NW wastewater interceptor system extension • Pipeline corridor improvements • King Edward corridor improvements • Pipeline & Leila intersection improvements	• Clement Parkway (Ridgewood to Abinojii Mikanah) • Wilkes Ave corridor improvements • Shaftesbury/Wilkes/railway intersection improvements • McCreary Rd corridor improvements • McGillivray Blvd corridor improvements • Wastewater interceptor • Water feedermain	• Wastewater interceptor • Water Feeder Main	• Wastewater interceptor • Water Feeder Main • Kenaston/Waverley intersection improvements • Kenaston (PTH 100 to Abinojii Mikanah) corridor improvements
Anticipated growth-supportive infrastructure	• Silver Ave extension • Sturgeon Rd (Saskatchewan to Ness) widening • Sturgeon/ Saskatchewan intersection improvements	• Facility Optimization – WW (fire) station (funded) • So. Wpg Rec Campus Ph. 1 (funded) • So. Wpg Rec Campus: Aquatic (2028) • So. Wpg Rec Campus: Arena (2027) • So. Wpg Rec Campus: Library (2028) • Bison Dr extension	• Bonavista Recreation Centre (2026) • Land acquisition for SE Wpg Regional Rec & Aquatic Centre (2030) • SE Wpg Regional Rec & Aquatic Centre (2036) • St Anne's widening (Aldgate to PTH 100) • Abinojii Mikanah and St Anne's intersection improvements	None	• East of Red RecPlex (2026) • Community/ rec centre • Fire station • Plessis widening • Dugald widening • Dugald & Lagimodiere intersection improvements	• Shaftesbury/ Wilkes/railway intersection improvements • Shaftesbury corridor improvements • McCreary corridor improvements	• NW wastewater interceptor system extension • Land acquisition for NW Wpg Regional Rec & Aquatic Centre (2031) • NW Wpg Regional Rec & Aquatic Centre (2036) • Library • Fire station	• NW Wpg Regional Rec & Aquatic Centre (2036) • Community/rec centre • Library • Outdoor aquatic park	• Community/rec centres • Library • Fire station	• SE Wpg Regional Rec & Aquatic Centre (2036) • Library • Fire station • Dakota St extension • Abinojii Mikanah and St Anne's intersection improvements • Abinojii MIkanah and St Mary's intersection improvements • Lagimodiere corridor improvements • St Anne's corridor improvements • St Mary's corridor improvements	• So. Wpg Rec Campus Ph. 1 (funded) • So. Wpg Rec Campus: Aquatic (2028) • Library • Abinojii Mikanah and Kenaston intersection improvements • Pembina corridor improvements
Site dependencies	None	None	None	Wilkes South sector plan needed before Clement Parkway can be planned as per Council motion Dec. 13, 2017	None	None	None	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. St Norbert By-Pass (Provincial project) may also be required.
Land assembly requirement	Some assembly	More assembly	More assembly	More assembly	More assembly	Assembled	Some assembly	Some assembly	More assembly	More assembly	Some assembly
Primary Transit Network	No planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	Planned connection
Decision-making guidance	Subdivision and rezoning applications may be submitted following completion of a precinct plan. Build-out may be limited by the need for growth-enabling infrastructure.				These sites will be the next priorities for precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.				Completion of sector plans are required before precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.		

Figure 8-4: Updated Greenfield Development Opportunities and Constraints table, 2025

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
Precinct and sector planning	Precinct D, South Transcona, St Vital Perimeter South	At varying stages, the Public Service is currently engaged with landowners in precinct and sector planning processes for South Transcona, St Vital Perimeter South, and Precinct D. Associated studies will help refine the need/non-need for growth-enabling and -supportive infrastructure.
Emergency vehicle preemption	City-wide	On October 6, 2024, Winnipeg Fire and Paramedic Service provided a report to Standing Policy Committee on Community Services detailing the results of an emergency vehicle preemption pilot. The study found that preemption, which interrupts normal traffic signal operation to prioritize emergency vehicle response, decreases the time it takes first responders to arrive at an emergency scene, expanding the geographic coverage of existing stations. If budget is approved to implement this citywide, it could reduce the need for new stations, subject to further study.
Wastewater servicing	Fort Whyte, Waverley West B, southwest Winnipeg	The Southwest Interceptor is fully funded, with construction planned for 2027 to 2032. 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.
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

Topic	Implications for	Description
		requirements based on expected growth; it will consider both extension requirements and interceptor upgrades. The Water and Waste Department (WWD) will be investigating existing interceptor capacities, potential upgrades, and required extensions over approximately two years beginning in 2026. Full build-out in these growth areas may be limited in advance of construction. Only Precincts D, B, and A (Precinct A is designated for future industrial development) will benefit from an extension, while other areas may benefit from upgrades.
Wastewater servicing	South Transcona	The Northeast Interceptor assessment has identified the Dugald Interceptor as a potential constraint to development. It may require upgrades depending on the level of development proposed in the future secondary plan for the area. Analysis and design through this process will either demonstrate that development can be accommodated, 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 treatment	South and West Winnipeg	Based on planning level information, the South End Sewage Treatment Plant (SEWPCC) is expected to reach capacity in the early 2030s. WWD will be reviewing remaining available capacity beginning in 2026, including identifying any constraints to development and options to mitigate those constraints. WWD recently completed a study assessing the capacity of the West End Sewage Treatment Plant (WEWPCC). WEWPCC is anticipated to have sufficient remaining capacity for residential development to the mid-to-late 2030s. There are several options to intensify treatment processes and/or expand the plant. A future study will be needed to identify and recommend specific upgrades.

Topic	Implications for	Description
Water and wastewater servicing	Airport Area West Residential & Industrial (CentrePort South)	Construction of regional water and wastewater infrastructure for Phase 1A is underway. Substantial completion 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.

Figure 8-5: Items being monitored for future versions of this report

8.4 "Completing" Existing Greenfields

With its scope limited to growth areas with existing constraints to development, the Greenfield Development Opportunities and Constraints Table provides an incomplete picture of outstanding growth-related infrastructure. The map below aims to address this by identifying greenfield sites without development constraints but lacking in identified growth-supportive infrastructure. This includes major roads and community services projects, whose inclusion were based on:

- The location of growth areas within targeted catchment areas (as defined by the *Winnipeg Recreation Strategy*) of planned facilities; and
- Forecasted contributions of vehicle kilometers traveled on planned major road projects (as identified by the *Winnipeg Transportation Master Plan 2050*) attributable to growth areas and other road improvement projects identified from development transportation impact studies.

Other project categories would be included but were not identified. Planned growth-related fire stations are fully captured in the Greenfield Development Opportunities and Constraints Table, while other planned stations are driven by other lifecycle activities, such as a need to renew and/or replace aging facilities. Planned growth-related water and wastewater projects are all considered to be growth-enabling. Identified projects would additionally benefit other existing areas beyond those identified as emerging greenfield neighbourhoods.

Like the Greenfield Development Opportunities and Constraints Table, the identification of projects and their relationships to sites is reflective of the best available information at the time of publication. It is constantly evolving and will be reviewed annually and refined over time through additional study and analysis.

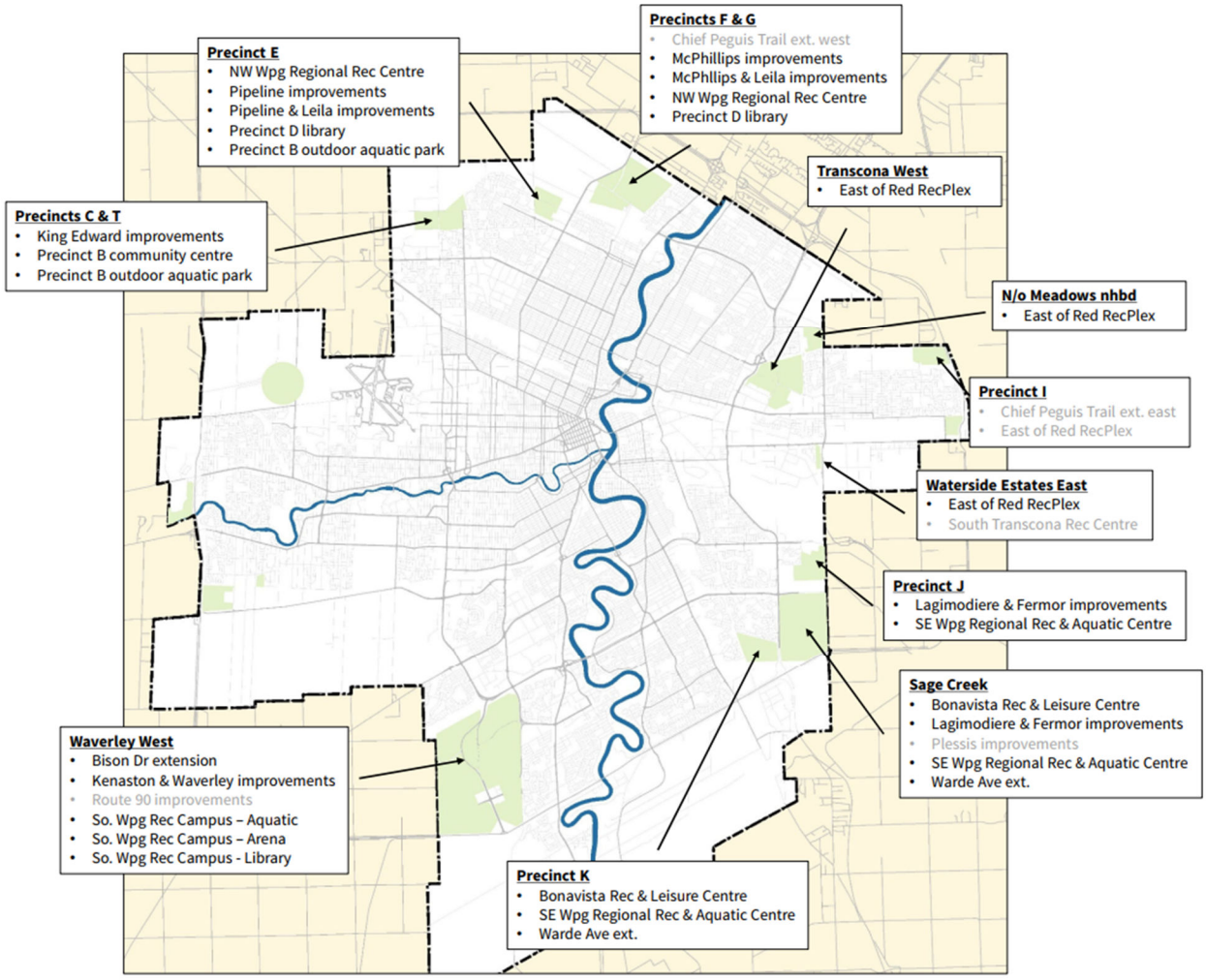


Figure 8-6: Map of outstanding growth-supportive infrastructure in existing serviced greenfield residential areas (weaker relationships[1] noted in grey)

Future versions of this analysis should further explore the relationship between planned growth-related infrastructure projects and infill areas. Moreover, City investment planning must ensure it considers future infill growth as it assesses the ability of its assets to respond to growth-driven demand. Most planned infrastructure in infill areas appears to be driven by other lifecycle activities, such as renewals or upgrades. While anticipating the location and intensity of infill development is more challenging than in greenfields, the City will need to ensure this is accounted for as Winnipeg continues to intensify as forecasted.

8.5 Forecasting Growth-Enabling Infrastructure

As noted in Section 5.2, the City has an estimated nine-year supply of vacant serviced greenfield land. Timely investments in growth-enabling infrastructure will be needed to maintain a healthy greenfield land supply. *Complete Communities 2.0* policies prescribe the

[1] Projects noted in grey have weaker but nonetheless notable relationships to study area based on the metrics used.

timing and sequencing of these investments (see Section 3). Figure 8-7 below translates these policies into specific targets, while Figure 8-8 provides a broader picture of growth-enabling infrastructure requirements relative to City investment planning tools, the six-year Capital Budget and ten-year Infrastructure Plan. The latter is focused on projects needed to enable the development of lands identified as "Short-to-medium term" in CCDS 2.0 greenfield phasing policies, while "Long term" land requirements and timing will be refined through future sector planning processes as well as a future review of phasing policies.

Phasing tier	Ground-oriented units		Outstanding projects	Enabling area(s)
	Year DUs needed	Year inf. needed		
Tier 1	2034	2031	CentrePort South water and sewer	Airport Area West
Tier 2	2036	2033	Warde Ave extension	Precinct K South
Tier 3	2040	2037	Chief Peguis Trail and area transportation improvements[1]	Precinct D
Tier 4	2045	2042	NW Interceptor, Clement Parkway	Precincts B & Q
Long term	2049	2046	Other	TBD

Notes:
- AA West (Tier 1) will be serviced in phases, accelerating demand for subsequent tiers by 1-1.5 years.
- Approval of a South Transcona precinct plan (Tier 2) – currently underway – would result in the gain of ~ two years of supply. This plan may identify growth-enabling infrastructure.

Figure 8-7: Outstanding growth-enabling infrastructure, greenfield phasing tiers, and forecasted timing requirements

[1] As described in the Greenfield Development Opportunities and Constraints Table in Section 8.3, anticipated area improvements include the McPhillips and Leila and Pipeline and Leila intersections, and the McPhillips, Pipeline, and King Edward corridors. These needs, including their timing relative to site build-out, will be refined through transportation analysis associated with future precinct planning and development application review.

City investment planning tools

INFRASTRUCTURE PLAN

SIX-YEAR CAPITAL BUDGET

Project	1-6 years (2025-2030)	7-10 years (2031-2034)	11-20 years (2035-2044)
NEWPCC Upgrades: Biosolids Facilities (Project 2)	Funding has been secured for detailed design and construction to occur in this time period.		
SEWPCC Facilities Plan	Funding is approved for this study to be undertaken in this time period. Study to inform timing and scope of possible upgrades.		
CentrePort South Water and Sewer	Funding is approved for Phase 1A detailed design and construction. Construction should be completed 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 in this time period.		
Warde Ave extension	Funding should be provided for detailed design and construction in this time period.		
Chief Peguis Trail (Main to Brookside) and area transportation improvements	Funding should be provided for detailed design in this time period.	Funding should be provided in the preceding time period to ensure construction is completed at this time.	
Northwest wastewater interceptor system extension	Project to be planned in concurrence with Chief Peguis Trail. As a result, funding should be provided for detailed design in this time period. A secondary plan for Precinct D should be provided in advance of detailed design to inform land use assumptions.		While the project would benefit Precinct D and could be provided earlier, it is needed for Precinct B and, as a result, funding should be provided for construction during this time period at the latest.
Clement Parkway (Grant to Wilkes)			Funding should be secured for detailed design and construction to occur in this time period.

Figure 8-8: Recommended timing of short-to-medium term growth-enabling infrastructure based on existing policies, as of January 1, 2025

This forecast should be reviewed annually to capture changing conditions, including development and refinement of business cases, potential project alternatives, land supplies and estimated rates of absorption, and funding priorities.

The City will be faced with one such consideration in the next few years. Existing policy identifies the Warde Ave extension, which enables development of the south half of Precinct K, as the next growth-enabling infrastructure project needed to support greenfield development. Based on current land supply estimates, it should be funded to be in place by 2033. However:

- Having been identified as a Medium Term (2034-50) priority in the Transportation Master Plan 2050, funding has been requested for a preliminary design study in 2027, but nothing has been forwarded to-date for project construction. Other projects are planned as higher priorities in the short term ahead of Warde Ave, including Chief Peguis Trail and Route 90 upgrades.
- Notwithstanding Warde Ave, wastewater treatment capacity may not be sufficient to allow full buildout of Precinct K at that time, as SEWPCC may reach capacity by the early 2030s (ongoing upgrades are primarily driven by environmental license requirements related to nutrient removal). Water and Waste will be reviewing remaining available capacity beginning in 2026, including identifying any constraints to development and options to mitigate those constraints.

The City could alternatively prioritize the servicing of Precinct D by funding the Chief Peguis Trail extension, which provides much larger land supply than Precinct K South, though at a much higher cost. Warde Ave is currently priced at between $42m and $69m while Chief Peguis Trail is priced at $930m, with additional area road improvements currently unpriced. The table below describes the recommended timing of these projects needed to maintain Council's minimum land supply targets if Precinct K South and Precinct D were to swap priority in CCDS 2.0 phasing policies. The need for Chief Peguis Trail is advanced by a few years, while Warde Ave could be deferred up to nine years, though delaying investment in the southeast to the 2040s – which could include SEWPCC upgrades in addition to Warde Ave – would result in land supply shortages in the quadrant and would likely be misaligned with industry expectations. It should be noted that CCDS stops short of prescribing land supply targets by quadrant; Policy B1.4.2.1 only directs the City to endeavour to provide a reasonable land supply in each quadrant of the City.

Phasing tier	Ground-oriented units		Outstanding projects	Enabling area(s)
	Year DUs needed	Year inf. needed		
Tier 1	2034	2031	CentrePort South water and sewer	Airport Area West
Tier 2	2036	2033	Chief Peguis Trail and area transportation improvements	Precinct D
Tier 3	2045	2042	Warde Ave extension	Precinct K South
Tier 4	2045	2042	Clement Parkway, NW Interceptor	Precincts B, Q
Long term	2049	2046	Other	TBD

Notes:
- AA West (Tier 1) will be serviced in phases, accelerating demand for subsequent tiers by 1-1.5 years.
- Approval of a South Transcona precinct plan (Tier 2) – currently underway – would result in the gain of ~ two years of supply. This plan may identify growth-enabling infrastructure.

Figure 8-9: Outstanding growth-enabling infrastructure, greenfield phasing tiers, and forecasted timing requirements, if Precinct D was to be prioritized over Precinct K South

It is expected that the Warde Ave extension can be designed and built within five years from Council approval of funding, while Chief Peguis Trail can be done in six (Water and Waste plans to advance the Northwest Interceptor in concurrence with Chief Peguis Trail). Working backwards from 2033, the City may only have two years to decide how it will service the next generation of greenfield residential development, without which it projects to face a constrained land supply relative to Council's targets.

These projects represent only a portion of the City's overall infrastructure deficit, which in the 2024 infrastructure Plan was estimated at $8b worth of unfunded capital projects needed over 10 years. Their funding will need to be prioritized against other projects needed for other reasons[1], such as asset rehabilitation, regulatory compliance, or alignment with new strategic priorities. In the face of these demands, Council may be challenged to meet its serviced land supply targets.

8.6 Forecasting Growth-Enabling Plans

The timing of growth-enabling secondary plans noted in the Greenfield Development Opportunities and Constraints table can be forecasted based on *Complete Communities 2.0* policies. To meet Council's planned land supply target of 10 years, plans should be prepared and approved by Council as recommended[2] 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-

[1] The 2024 Infrastructure Plan identified $3.2b of unfunded projects related to renewals, and $1.9b for upgrades. Renewals are defined as activities to rehabilitate or replace an existing asset to restore equivalent quality, capacity, or function, while upgrades are defined as activities to improve an existing asset to achieve enhanced fit for purpose, new strategic priorities, or regulatory requirements.

[2] 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.

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	Total units[1]	Years supply	Year plan should be adopted by Council
Existing vacant planned	28,200	13 years	n/a
South Transcona	4,960	2.5 years	2027
Fort Whyte	1,490	0.5 years	2027
Precinct D	11,650	5.5 years	2030
Precinct B	4,080	2 years	2035

Figure 8-10: Recommended timing of outstanding growth-enabling secondary plans based on the Primary demand and Standard supply scenarios

[1] 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 rights-of-way 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 5.1 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 forecasts prepared by the City's Office of Economic Research, 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. In weighing these factors, it selected a more limited number of scenarios ("High", "Primary", and "Low") to represent a reasonable range of potential outcomes, while the wider range can help communicate the impacts of more drastic demographic and/or market changes.

Step 4: Forecast years of supply

Finally, years supply is determined by dividing the total supply by forecasted annual greenfield absorption.

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 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;

[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.

- 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

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"[2]. 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

[1] Source: *City of Winnipeg Determination of Regulatory Fees to Finance Growth: Technical Report*, p. 38.
[2] Pg. 6-3.

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.

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.

[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.

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 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.

Appendix B: Development Activity by Established Neighbourhood

B.1 Mature Communities

Neighbourhood	2020-24					2024
	Singles	Semis	Rows	Apts	Total	Total
Archwood	4	2		4	10	
Beaumont	55				55	22
Brooklands	56				56	1
Bruce Park	14				14	2
Burrows Central	31				0	4
Burrows-Keewatin	1	2	7	3	13	1
Centennial	2			60	62	2
Central River Heights	7				7	2
Central St. Boniface	8	10	13	52	83	9
Chalmers	38	2	22	66	128	5
Crescent Park	11				11	1
Crescentwood	9			16	25	6
Daniel McIntyre	8			30	38	9
Deer Lodge	18				18	5
Dufferin	3				3	
Dufresne	1				1	
Earl Grey	23			12	35	9
East Elmwood	2	2			4	2
Ebby-Wentworth	24				24	1
Edgeland				168	168	84
Elm Park	2				2	
Glenelm	1				1	
Glenwood	108	2			110	14
Grant Park		2		11	13	
Holden	2				2	
Inkster Industrial Park	2				2	
Inkster-Faraday	6				6	1
J.B. Mitchell	2				2	2
Jefferson	24			2	26	3
Kern Park	10			60	70	2
Kildonan Drive	5				5	1
King Edward	107				107	21

Neighbourhood	2020-24					2024
	Singles	Semis	Rows	Apts	Total	Total
Kingston Crescent	3				3	
Kirkfield	1				1	
Lord Roberts	33	1	4		38	7
Lord Selkirk Park		2			2	
Luxton	4		6	3	13	6
Margaret Park	2				2	
Maybank	38				38	8
McMillan		2		86	88	
Melrose	9			17	26	18
Minto	8	2			10	1
Munroe East	21			4	25	5
Munroe West	10			4	14	2
North Point Douglas	1				1	
North River Heights	46			24	70	10
North St. Boniface	5			95	100	
Norwood East	16	2	8	40	66	18
Norwood West	9				9	4
Old Tuxedo	14				14	3
Point Road	12			12	24	2
Radisson	4				4	
River-Osborne				425	425	98
Riverview	17			3	20	7
Robertson	5		3		8	4
Rockwood	12			4	16	
Rossmere-A	4		4	168	176	24
Rossmere-B	13			32	45	2
Sargent Park				2	2	
Seven Oaks	14				14	4
Shaughnessy Park	12				12	
Silver Heights	2			51	53	
Sir John Franklin	52				52	15
Spence	2	2		85	89	3
St. George	11		10	23	44	6
St. John’s	8			8	16	2
St. John’s Park				2	2	2
St. Matthews	7	1		259	267	2

Neighbourhood	2020-24					2024
	Singles	Semis	Rows	Apts	Total	Total
St. Norbert	1				1	1
Talbot-Grey	9		4		13	1
Varennes	23	2	8	19	52	9
Victoria Crescent	1				1	
Victoria West	6			12	18	
Wellington Crescent	22		4		26	4
West Alexander	6	2	40	107	155	62
West Broadway				229	229	11
Weston	25			7	32	9
Wildwood	2		6		8	
William Whyte	17	4		27	48	1
Wolseley	6			28	34	2
Woodhaven	3				3	
Worthington	5			3	8	

Neighbourhoods not listed did not receive any development across the noted time period.

B.2 Recent Communities

Neighbourhood	2020-24					2024
	Singles	Semis	Rows	Apts	Total	Total
Amber Trails	10	20			30	
Betsworth	5			60	65	2
Booth	2				2	1
Buchanan	1				1	1
Canterbury Park	6				6	
Cloutier Park	1				1	
Dakota Crossing	3			62	65	
Eaglemere	1			513	514	
Elmhurst	7				7	
Eric Coy	8				8	
Fairfield Park	2			68	70	
Fort Richmond	6			24	30	1
Fraipont	1				1	
Glendale	2				2	
Grassie	4	4		72	80	74
Heritage Park	1				1	
Island Lakes	4			48	52	
Jameswood	1				1	1
Lavalee	3		6		9	
Leila North				388	388	
Linden Ridge				207	207	
Linden Woods	1				1	
Mandalay West		6	9	102	117	
Marlton	10			270	280	7
Meadowood		25		18	43	
Minnetonka	5			196	201	1
Mission Gardens			35		35	
Montcalm				206	206	
Norberry	7				7	4
Normand Park	2			200	202	59
Parc La Salle			4		4	
Peguis		8			8	
Pulberry	3		8		11	

Neighbourhood	2020-24					2024
	Singles	Semis	Rows	Apts	Total	Total
Radisson	2				2	
Regent				144	144	
Richmond West	1			65	66	65
Ridgedale	6				6	2
River East	3			29	32	
River Park South	4			340	344	233
Riverbend	8			153	161	
Rivergrove	1				1	
Roblin Park	4				4	
Rossmere-A	1		7		8	
Royalwood	10				10	4
South Tuxedo	6				6	
Southboine	1				1	1
Southdale	1				1	
Springfield North	49				49	
St. George	2				2	8
Sturgeon Creek	4				4	
Templeton-Sinclair	3			27	30	2
The Maples	1		39	84	124	
Trappistes	1				1	
Tuxedo	14				14	2
Tuxedo Industrial				131	131	131
Tyndall Park	3				3	
Valhalla				1	1	
Valley Gardens			8	84	92	4
Varsity View	3				3	
Vialoux	3		4		7	1
Victoria Crescent	6				6	1
Westwood	5				5	
Whyte Ridge				228	228	228
Windsor Park				77	77	18

Neighbourhoods not listed did not receive any development across the noted time period.