

LOW DENSITY RESIDENTIAL LOT ABSORPTION AND SUPPLY

2021 ANNUAL REPORT (UPDATED, NOVEMBER 2022)

URBAN GROWTH | PLANNING & ENVIRONMENT SERVICES | URBAN PLANNING & ECONOMY

INTRODUCTION

The objective of this report is to evaluate where and how fast residential land absorption is occurring within Edmonton’s developing area, by comparing neighbourhoods’ year-over-year development trends.

Low density residential (LDR) development metrics are used to measure the rate of land consumption and remaining potential lot supply. For the purpose of this analysis, LDR includes single- and semi-detached lots and excludes country residential. Once a low density lot is registered at Alberta Land Titles, it is legally available to be developed and therefore considered absorbed. Absorption is defined as the number of low density residential lots registered each year within the approved statutory plans. The number of low density lot registrations is also an indication of the level of neighbourhood completion, which will be a key metric in monitoring the Growth Management Framework’s developing area substantial completion standard, and is under development. In the future, this report will also monitor residential building permits to assess the level of completion for Medium Density Residential (MDR) and High Density Residential (HDR) dwelling units.

Potential lot supply refers to the estimated number of unregistered low density residential lots within approved Area Structure Plans (ASPs), Servicing Concept Design Briefs (SCDBs) or Neighbourhood Structure Plans (NSPs). Amendments to an approved NSP over the course of its implementation may include increasing or reducing land capacity in the neighbourhood. These amendments are reflected in annual updates to this report.

LOT ABSORPTION BY DISTRICT

In 2021, there were 3,648 lots absorbed across the six districts in the developing area of the city (Figure 1). There was a decrease in lot absorption between 2017 and 2018, dropping from 3,979 lots to 3,395 lots. In the following years, the lot absorption rate continued to decrease to 2,672 lots and 1,927 lots in

2019 and 2020, respectively. However, 2021 recorded a lot absorption of 3,648 lots, an 89 per cent increase in lot absorption over the previous year.

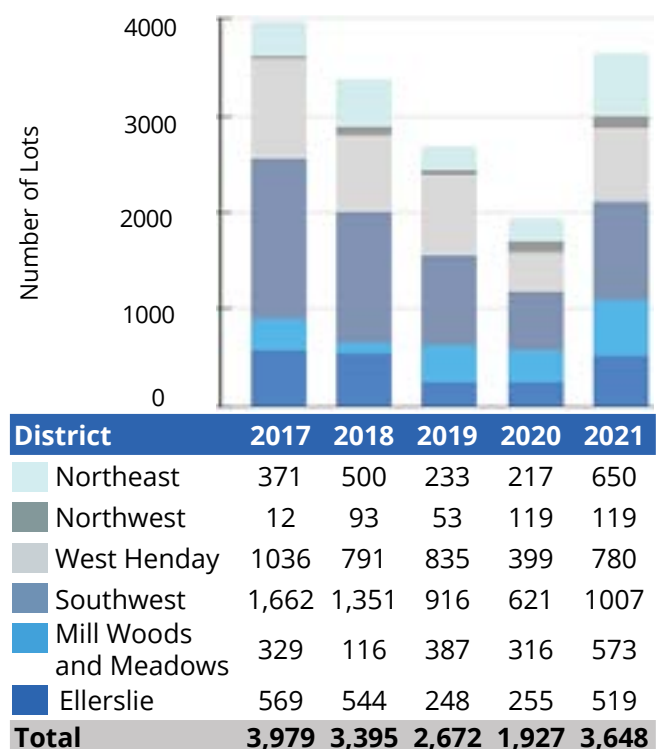


Figure 1. 2021 Annual Absorptions by Districts (Updated, November 2022)

The Horse Hills, West Edmonton and Whitemud Districts were excluded from the above chart as lot absorption between 2017 and 2021 were negligible (three lots or less).

The overall number of lots absorbed does not include the surplus registered lots that exceed the planned lot capacity established in the corresponding Plans in Effect (Neighbourhood Structure Plans). In addition, the results exclude the statutory plans repealed through the City Planning Framework.

Lot absorption rates varied significantly between districts. The Southwest and West Henday districts had the highest number of LDR lot registrations in 2021, with 1007 lots and 780 lots, respectively. The Northwest district absorbed the lowest number of lots (119). Over 2,600 potential lots remain in the supply in the Northwest (see Figure 2).

81,110
 Number of the LDR potential lot supply available in approved ASPs and NSPs, as of December 2021.

As of December 2021, the LDR potential lot supply available in approved ASPs and NSPs was 81,110 (Figure 2). The West Henday district has the highest remaining potential lot supply at 22,574, representing 28 per cent of all lots, while Ellerslie and Horse Hills districts have 26 per cent and 22 per cent of the remaining potential lot supply, respectively. The Whitemud district has the lowest remaining potential lot supply at 351 lots representing 0.4 per cent in 2021.

Figure 2 (below) shows that almost 69 per cent of the potential lot supply in the Ellerslie and Horse Hills districts are in planned neighbourhoods with no approved NSPs (but within approved ASPs).

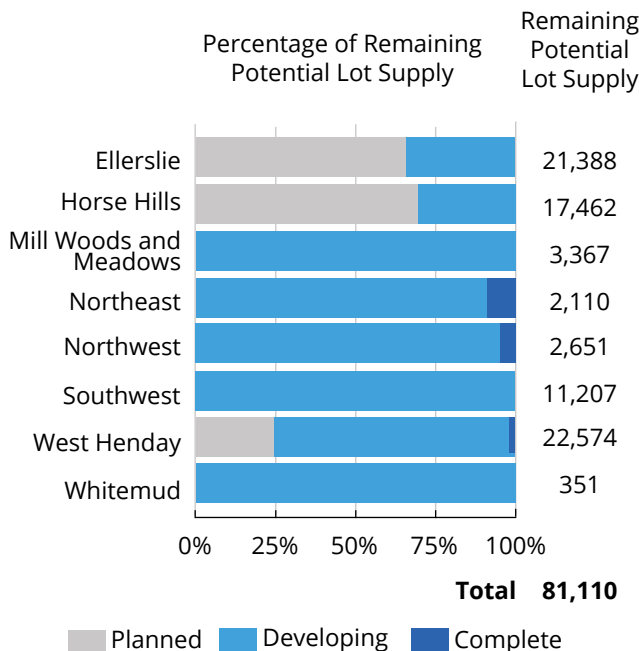


Figure 2. 2021 Potential Lot Supply (Updated, November 2022)

All of the potential lot supply (5,112 lots, six per cent of the total) within the Northeast, Northwest and Whitemud districts are within developing

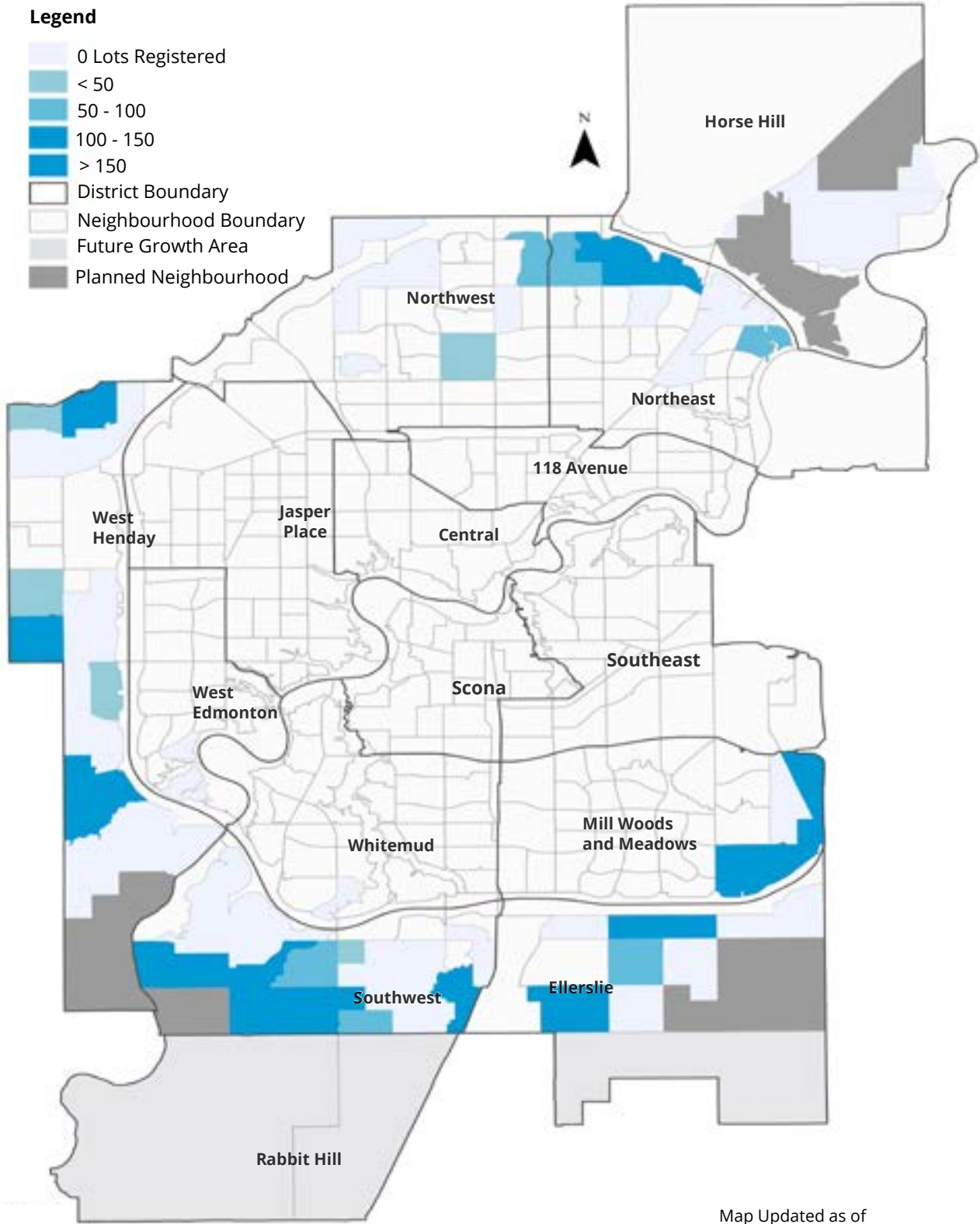
neighbourhoods with approved NSPs. Future demand for housing and correlated affordability will affect the absorption of LDR lots and lot supply.

Historically, neighbourhoods were considered 'complete' (95 to 100 per cent of lots registered as a percentage of the planned lot capacity based on the corresponding NSP, as defined in prior reports).

Map 1 broadly shows the spatial distribution of lots registered in 2021 by the various neighbourhoods within the developing area districts. Southwest, West Henday and Northeast districts saw the highest volume of lot absorption. Near term LDR lot servicing activity and residential development are likely to be concentrated within the developing area across the above mentioned districts to meet future anticipated single family housing needs. See Appendix 1 and 2 for more details on lot absorption and supply at the neighbourhood level.

CONCLUSION

The Southwest district has the highest number of lot registrations to date, with more than 11,000 lots absorbed since 2017. The developing area neighbourhoods within the West Henday, Ellerslie and Horse Hills districts have the largest share of remaining potential lot supply, accounting for about 61,000 lots of the remaining potential lot supply in 2021. This represents 76 per cent of the total remaining low density residential lot supply, indicating that sufficient capacity for low density residential development or expansion currently exists. In addition, shrinking average new lot sizes could further extend available land for residential development.



Map 1. Low Density Residential Lot Registrations By District (2021)

APPENDIX 1. DEVELOPING NEIGHBOURHOODS LOT ABSORPTION (UPDATED, NOVEMBER 2022)

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity	Remaining Potential Lots (as of 2021)	Percent of Lots Completed
Ellerslie	Decoteau	Decoteau North	2,180	2,180	0%
	Ellerslie	Ellerslie	1,211	0	100%
		The Orchards At Ellerslie	4,262	2,072	51%
	Southeast	Charlesworth	1,377	0	100%
		Mattson	1,834	1,834	0%
		Walker	3,018	605	80%
Horse Hills	Horse Hills	Marquis	5,345	5,342	0%
Mill Woods and Meadows	The Meadows	Aster	2,152	1,834	15%
		Laurel	3,743	369	90%
		Maple	1,524	237	84%
		Tamarack	2,226	927	58%
Northeast	Clareview (OP)	Clareview Town Centre	303	33	90%
	Ebbers NASP	Ebbers	304	53	83%
	Edmonton North	Crystallina Nera East	695	491	27%
		Crystallina Nera West	1,128	303	73%
		Schonsee	1,368	204	85%
	Fraser NASP	Fraser	1,523	0	100%
	Pilot Sound	Cy Becker	1,187	317	73%
		Gorman	558	558	0%
		Hollick-Kenyon	1,375	0	100%
		McConachie	2,880	151	95%
Northwest	Castle Downs Extension	Canossa	1,370	434	68%
		Rapperswill	1,048	56	95%
	Edmonton North	Eaux Claires	875	25	97%
		Klarvatten	1,605	54	97%
	Goodridge Corners NASP	Goodridge Corners	1,102	1,102	0%
	Griesbach NASP	Griesbach	2,285	980	57%
	Palisades	Albany	187	0	100%
		Carlton	1,163	0	100%
		Hudson	548	0	100%

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity	Remaining Potential Lots (as of 2021)	Percent of Lots Completed	
Southwest	Cashman NASP	Cashman	0	0	100%	
	Heritage Valley (SCDB)	Allard	1,931	119	90%	
		Callaghan	905	275	70%	
		Cavanagh	1,176	152	87%	
		Chappelle Area	4,606	768	83%	
		Desrochers Area	790	83	89%	
		Graydon Hill	340	0	100%	
		Hays Ridge Area	1,242	855	31%	
		Heritage Valley Area	393	393	0%	
		Heritage Valley Town Centre Area	150	150	0%	
		Paisley	792	81	90%	
		Richford	350	0	100%	
		Rutherford	2,815	467	83%	
		Windermere	Ambleside	2,117	605	71%
			Glenridding Heights	1,120	0	100%
			Glenridding Ravine	2,009	1,029	49%
			Keswick	4,196	2,500	40%
	Windermere	4,147	1,280	69%		
West Edmonton	Cameron Heights NASP	Cameron Heights	883	0	100%	
	West Jasper Place	Donsdale	518	0	100%	
West Henday	Big Lake	Hawks Ridge	1,408	1,131	20%	
	Edgemont NASP	Kinglet Gardens	1,620	1,500	7%	
		Pintail Landing	861	861	0%	
		Starling	1,189	608	49%	
		Trumpeter Area	1,552	789	49%	
		Edgemont	3,882	2,114	46%	
		Lewis Farms	Breckenridge Greens	427	0	100%
			Potter Greens	510	32	94%
			Rosenthal	2,946	1,489	49%
			Secord	3,075	565	82%
			Stewart Greens	669	244	64%
	Riverview	Suder Greens	1,025	163	84%	
		Webber Greens	750	0	100%	
		River's Edge	2,781	2,781	0%	
		Stillwater	2,995	2,647	12%	
		The Uplands	2,013	1,685	16%	
	The Grange	Glastonbury	1,454	0	100%	
		Granville	1,175	471	60%	
		The Hamptons	3,460	10	100%	
Whitemud	Terwillegar Heights (SCDB)	Mactaggart	951	351	63%	
TOTAL			115,599	46,359		

APPENDIX 2. PLANNED NEIGHBOURHOODS POTENTIAL LOT SUPPLY (UPDATED, NOVEMBER 2022)

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity
Ellerslie	Decoteau	Central	2,761
		Northwest	2,709
		Southeast	5,706
		Southwest	3,521
Horse Hills	Horse Hills	Horse Hill Neighbourhood 1 NSP	2,849
		Horse Hill Neighbourhood 2 NSP	1,293
		Horse Hill Neighbourhood 4 NSP	2,873
		Horse Hill Neighbourhood 5 NSP	5,105
West Henday	Riverview	Grandisle Neighbourhood 4	1,444
		White Birch Neighbourhood 5	4,040
Southwest	Windermere	Windermere Neighbourhood 5	2,450
TOTAL			34,751