APPROVED NET NEW DWELLINGS

2024 ANNUAL REPORT

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

INTRODUCTION

The City Plan calls for 50 per cent of new units to be added through infill citywide and to welcome 600,000 new residents into the redeveloping area (see Figure 1) by the time Edmonton reaches a population of two million people. There are several strategic measures the City uses to track progress towards these targets. They include housing distribution in the redeveloping and developing areas of the city and growth in districts, nodes and corridors and neighbourhoods.

The City Plan divides the growth between the baseline population of one million and the future population of two million into four equal increments of 250,000 people, called population horizons. Recognizing that that the rate of progress towards the targets will not be constant, The City plan sets interim targets for each population horizon.

This report uses residential building permit data for approved net new dwellings across Edmonton to help track growth trends and inform progress on each of these targets and measures. Building permits are required for most changes to structures in the city and are approved after development permit approval. Building permits are issued regardless if there is a net change in dwelling count. Building demolitions are accounted for in this analysis to enable evaluation of net dwelling counts. Analysis is refined between reporting years to improve accuracy, and thus may be slightly different from past years' reporting.

Residential building permit activity can be explored in-depth using the interactive building permit dashboard featured on the Monitoring and Analyzing Growth webpage. This tool allows users to manipulate and visualize the data in various ways, enabling a customized and detailed analysis of net new dwellings trends. The dashboards complement the static reports by offering a dynamic and interactive tool for data research and analysis.

DEVELOPING AND REDEVELOPING AREAS

In 2024, the City issued building permits for 15,190 net new dwellings across the developing (11,655 dwellings) and redeveloping (3,535 dwellings) areas (Figure 1).[1] The total number of approved net new dwellings represents an overall increase of 54 per cent from 2023 and the highest count since the current approach to monitoring began in 2005. It is also 31 per cent higher than the annual citywide five-year average of about 11,600 net new dwellings.

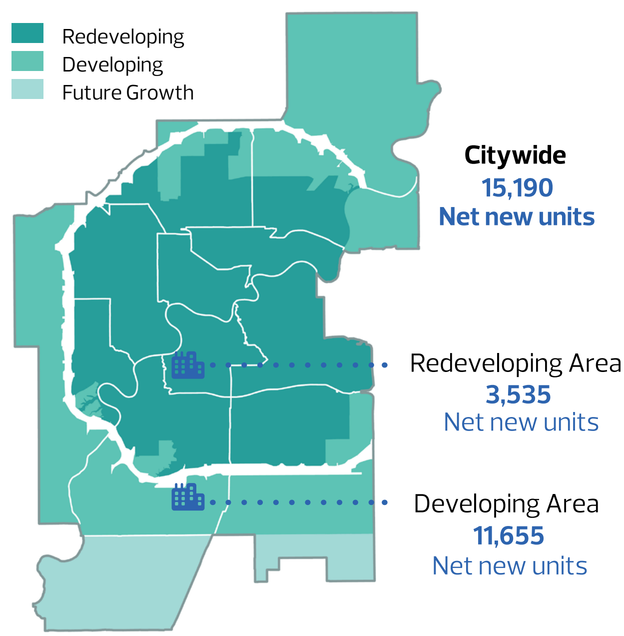


Figure 1. Distribution of Net New Dwellings, Developing and Redeveloping Areas (2024)

Multiple factors may have contributed to increasing housing development, such as the highest annual population growth rate since 2001,[2] decreasing national key inflation indicators,[3] and decreasing national interest rates.[4] 2024 was also the first year of the new Zoning Bylaw 20001 being in effect. Among its many goals, the bylaw aimed to reduce barriers to housing development.

1 This number excludes the demolition of eight residential units in the Industrial Area and River Valley Area. These Areas are outside the scope of this report.

2 City of Edmonton: Population History, 1878 – 2021, Statistics Canada: Edmonton population estimate, 2021 – 2024

3 Bank of Canada: Key inflation indicators and the target range

4 Bank of Canada: Interest rates posted for selected products by the major chartered banks

Twenty-three (23) per cent of all net new dwellings approved in 2024 were in the redeveloping area, compared to 30 per cent in 2023 (Figure 2). While the percentage of net new dwellings approved in the redeveloping area decreased in 2024, the total number of net new dwellings in the redeveloping area increased by about 21 per cent from 2,922 in 2023 to 3,535 in 2024. The decrease in annual infill percentage is due to the even larger increase in approved dwellings in the developing area.

Over the four full years since The City Plan was approved (2021 - 2024), 47,349 net new dwellings have been approved citywide. About 28 per cent of these approvals (13,061 dwellings) are in the redeveloping area.

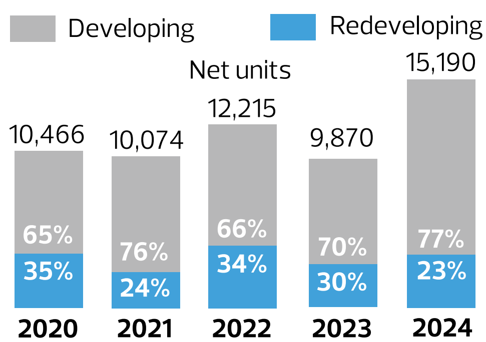


Figure 2. Approved Annual Net New Dwellings, Developing and Redeveloping Areas

The City Plan's interim target for the first population horizon (i.e. a population of 1.25 million) is for a cumulative 32 per cent of net new dwellings to be approved in the redeveloping area. Edmonton will likely reach that population horizon by 2027.[5] If development activities remain similar to the average annual citywide net new dwellings since The City Plan was approved, about 13,450 total net new dwellings (about 4,483 per year over three years) would need to be approved in the redeveloping area before the city reaches 1.25 million people for Edmonton to remain on track to meet The City Plan redeveloping area infill target for the first population horizon.

28

Per cent of cumulative net new dwellings approved in the redeveloping area since The City Plan was approved. Target: 32 per cent of cumulative net new dwellings approved by the 1.25M population horizon.

DISTRICTS

The District Policy and Plans were approved in 2024. Districts are diverse, accessible collections of neighbourhoods that contain most services and amenities Edmontonians need to meet their daily needs (The City Plan, p.34).

As shown in Figure 3 and Appendix 1, the five districts with the highest net new dwellings counts in 2024 were all located in the developing area: West Henday District (3,878; 26 per cent of total), Southwest (3,151; 21 per cent of total), Ellerslie (1,946; 13 per cent of total), Northeast (1,730; 11 per cent of total), and Northwest (970; six per cent of total). These five districts contained a combined 77 per cent of all net new dwellings. Horse Hill , Whitemud, and West Edmonton districts each had less than two per cent of the total and are therefore not shown individually in Figure 3.

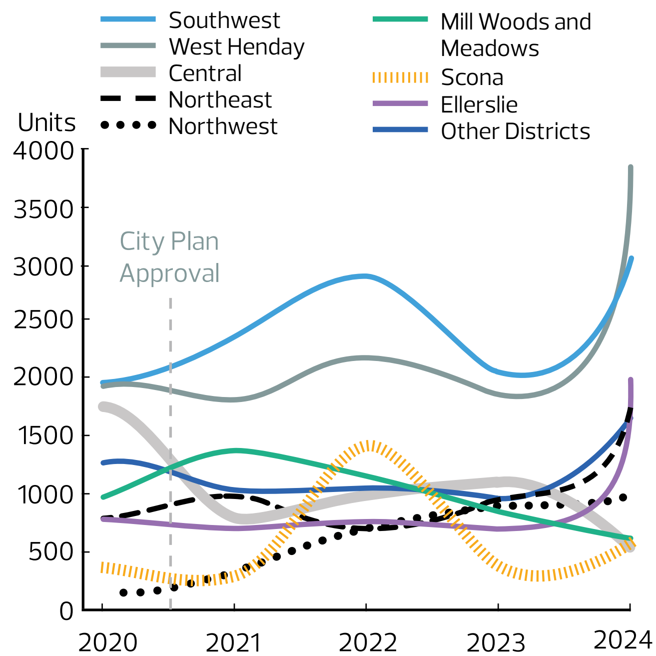


Figure 3. Annual Net New Dwellings by Planning District

Since The City Plan was approved, 2024 marked the first year that West Henday District had the highest count of approved net new dwellings. Based on the Low Density Residential Lot Absorption and Supply Report, the large supply of low density lots in West Henday District means there is relatively greater remaining capacity to accommodate future low density residential growth, compared to capacity in Southwest District.

As shown in Table 1, Southwest District has had the highest total count of approved net new dwellings since The City Plan was approved, averaging at 2,635 net new dwellings per year. Similar to 2024, the five districts with the highest net new dwellings counts since The City Plan was approved were all located in the developing area. This aligns with the anticipated growth pattern for the first population horizon in The City Plan. As shown in Map 10A of The City Plan, growth in The City Plan was anticipated throughout the developing area, with sections of Southwest, Ellerslie, and West Henday districts anticipated to have some of the highest dwelling

5 City of Edmonton, Spring 2025 Outlook Summary

unit growth. The City Plan anticipated that growth would be strongly influenced by existing statutory plans, market demand and existing investment programs in the first population horizon, reflecting a continuity of existing development pattern areas. Leading up to the 1.5 million population horizon, residential growth patterns are expected shift to a greater proportion of net new dwellings in the redeveloping area in line with The City Plan land use concept. This is because The City Plan accounts for a lag between the implementation and impact of new policies and initiatives.

Table 1. Total and Annual Net New Dwellings by Planning District (2021–2024)

District	Total Net New Dwelling	Average Annual Net New Dwelling
Southwest	10,541	2,635
West Henday	9,872	2,468
Northeast	4,476	1,119
Ellerslie	4,205	1,051
Mill Woods and Meadows	4,120	1,030
Central	3,623	906
Northwest	3,052*	763
Scona	2,629	657
North Central	1,528	382
Jasper Place	1,069	267
Southeast	1,004	251
Whitemud	524	131
West Edmonton	364	91
Horse Hill	342	86

*Excludes a 50 unit apartment/mixed use building approved in an industrial neighbourhood in 2021.

NEIGHBOURHOODS

In 2024, 182 Edmonton residential neighbourhoods (61 per cent) experienced a net dwelling gain, 91 residential neighbourhoods (31 per cent) saw no net change, and 24 residential neighbourhoods (8 per cent) had a net loss (potentially due to demolitions leading up to redevelopment) (Appendix 2). These percentages were similar to the previous two years.[6]

The top five redeveloping neighbourhoods for net new dwelling units in 2024 (as shown in Table 2), had 38 per cent of all net new dwellings in the redeveloping area. Griesbach alone made up 19 per cent of total redeveloping area net dwelling growth.

Medium and high density net new dwellings provided the majority (69 per cent) of net new dwellings in these top redeveloping neighbourhoods (926 net new dwellings). Specifically, two high density apartment/mixed-use buildings comprised most of the net new dwellings in Queen Alexandra and Downtown. However, in Blatchford Area, row house growth provided the majority of net new dwellings, making up 72 per cent of the net new dwellings in the neighbourhood.

The top five developing neighbourhoods for net new dwelling units in 2024 (as shown in Table 2) represented about 33 per cent of all net new dwellings in the developing area. The proportion of net new dwelling types within each of these top neighborhoods varied widely, with the exception of Clareview Town Center. About 87 per cent of net new dwellings in Clareview Town Centre were apartments/mixed use. Low density dwellings made up 67 per cent of the net new dwellings in the top developing neighbourhoods.

Neighbourhoods that were top developing neighbourhoods in 2023 and remained a top neighbourhood in 2024 (also shown in Table 2) had both low density (1,748 net new dwellings) and medium density (610 net new dwellings) net new dwellings in 2024. There was continued high activity in net new single detached houses activity in these three neighbourhoods in 2024 (731 net new dwellings). However the proportion of single detached houses in The Orchards at Ellerslie, Secord and Chappelle was about five percentage points less than the total proportion in the Developing Area overall (31 per cent, compared to 36 per cent areawide).

In the four full years since The City Plan was approved (2021–2024), the five redeveloping neighbourhoods with the highest total net new dwellings were Griesbach (1,916 dwellings), Garneau (1,078 dwellings), Wîhkwêntôwin (1,049 dwellings), Downtown (1,043 dwellings), and Westmount (348 dwellings). All these neighbourhoods are fully or partly located within Priority Growth Areas. Griesbach's growth is likely related to it being in the developing lifecycle stage with high annual residential development activities. High growth in Garneau, Wîhkwêntôwin, and Downtown is driven by a small number of new apartment/mixed use buildings with high counts of dwellings. Westmount dwelling growth is driven by a combination of apartments/mixed use, secondary suites, and row houses activities.

In the same time period, the five developing neighbourhoods with the highest total net new dwellings were Chapelle (2,330 dwellings), Keswick (2,224 dwellings), Secord (2,175 dwellings), The Orchards at Ellerslie (2,158 dwellings) and Glenridding Ravine (1,834 dwellings). Low density housing types, specifically single detached houses (46 per cent), row houses (22 per cent), and secondary suites or backyard houses (15 per cent) made up the majority of total net growth in top developing neighbourhoods.

6 Demolition and redevelopment in the same year and on the same site can lead to no net dwelling change, whereas demolition and redevelopment in different years can lead to a reported annual net dwelling loss.

Table 2. Top Five Neighbourhoods, Net New Dwellings in the Redeveloping and Developing Areas (2024)

Neighbourhood	2024	Neighbourhood	2023
Redeveloping Area			
Griesbach	667	Downtown	614
Downtown	181	Griesbach	559
Queen Alexandra	173	Boyle Street	228
Garneau	168	Inglewood	147
Blatchford Area	151	Grovenor	91
Developing Area			
The Orchards at Ellerslie	891	The Orchards at Ellerslie	546
Secord	888	Edgemont	501
Keswick	793	Glenridding Ravine	384
Clareview Town Centre	700	Chapelle	381
Chappelle	579	Secord	379

NODES AND CORRIDORS

The City Plan strategically directs medium density residential (MDR) and high density residential (HDR) growth to nodes and corridors.[7,8] Nodes are centres of activity of different shapes and sizes that feature a variety of housing types, gathering places, a mixture of land uses and varying tenures and affordability (The City Plan, p.98). Corridors are places for movement, living and commerce that are anchored by the mobility system and well connected to surrounding communities (The City Plan, p.98).

20
Per cent of net new dwellings in Edmonton approved in nodes and corridors, 2024.

As shown in Figure 4, about 20 per cent (3,003 dwellings) of net new dwellings citywide were approved in a node or corridor in 2024. Refer to Table 3 for a break down of the count and proportion of citywide dwellings in each type of node and corridor. As shown in Appendix 1, a relatively greater proportion of high density and medium density dwellings were approved in nodes and corridors when compared to the rest of the city in 2024. HDR dwellings comprised nine per cent of total net new dwellings in nodes and corridors compared to two per cent citywide. MDR dwellings comprised 73 per cent of of total net new dwellings in nodes and corridors compared to 28 per cent citywide. Low density residential (LDR) dwellings comprised 18 per cent of of total net new dwellings in nodes and corridors, compared to 70 per cent citywide.[9]

Table 3. Net New Dwellings in Nodes and Corridors Types (2024)

Nodes & Corridors Types	Count	Citywide Proportion
Centre City	228	1.5%
Major Nodes	852	5.6%
District Nodes	790	5.2%
Primary Corridors	473	3.1%
Secondary Corridors	660	4.3%
Total	**3,003**	**19.8%**

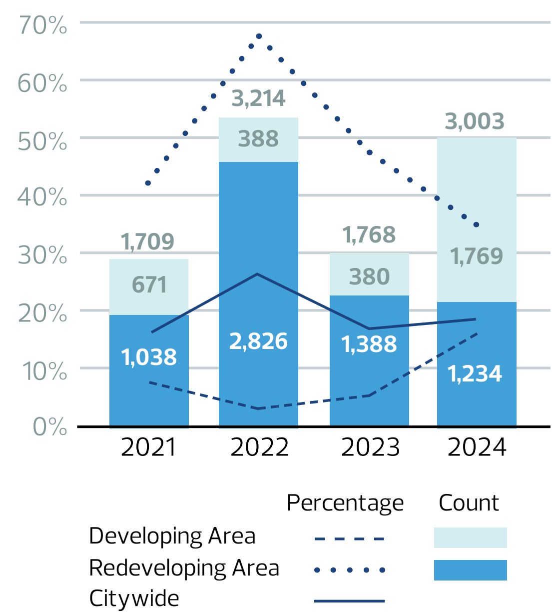


Figure 4. Net New Dwellings within Nodes and Corridors in Pattern Areas

Thirty-five (35) percent (1,234 dwellings) of all net new dwellings in the redeveloping area in 2024 were located in a node or corridor whereas 15 per cent (1,769 dwellings) of net new dwellings in the developing area were located in a node or corridor (Figure 4). The difference in proportion can be attributed to the building types that influence growth in each development pattern area. MDR and HDR, which is typically located in a node or corridor, had the largest influence on the total net new dwellings in the redeveloping area in 2024. In contrast, LDR, which is typically located outside a node or corridor, had the largest influence on the total net new dwellings in the developing area in 2024. Refer to the Density and Built Form section of this report for building type statistics and detailed breakdowns on density and built form.

7 Medium density residential (MDR): apartments/mixed use buildings of less than nine floors
8 High density residential (HDR): apartments/mixed use buildings of nine or more floors
9 Low density residential (LDR): backyard houses, secondary suites, single detached houses, semi-detached houses, row houses.

Compaing Total Observed Growth to The City Plan

As seen in Map 10A of The City Plan, The City Plan anticipates significant residential growth across the developing area within the first population horizon. The majority of residential growth anticipated in the redeveloping area is in nodes and corridors. The spatial distribution of observed total residential growth in the developing area is aligned with Map 10A, however there are some slight differences in the redeveloping area (Appendix 3). Although Center City and a few major nodes and primary corridors have experienced the highest growth in net new dwellings in the redeveloping area since The City Plan was approved, only 50 per cent of net new dwellings in the redeveloping area (6,486 dwellings) have been built in a node or corridor. Most of these are apartments and mixed-use dwellings (86 per cent, 5,583 dwellings). The remaining 50 per cent are located outside a node or corridor and are mainly LDR dwellings that include row houses and backyard houses. This may suggest that LDR may have had a higher than anticipated impact on the growth of the redeveloping area since The City Plan was approved.

In addition, as seen in Figure 4, the annual share of dwellings in the redeveloping area that are in a node or corridor declined for two consecutive years. In contrast, the share the of dwellings in the developing area that are in nodes and corridors has increased over time. Comparing the percentage of net new dwellings in nodes and corridors to the types of dwellings constructed shows that as the number of apartments/mixed use dwelling units increases, the proportion of dwellings in a node of corridor also increases. This is true in both the redeveloping and developing pattern areas.[10] This may indicate that the growth of nodes and corridors are linked to the growth of MDR and HDR, especially in the redeveloping area.

Compaing Observed Density Type Distribution to The City Plan

Since The City Plan was approved, the analysis of density types of net new dwellings shows that residential growth generally reflects the direction from The City Plan to prioritize MDR and HDR dwellings in nodes and corridors. This trend is most pronounced in the redeveloping area, where MDR and HDR developments are larger scale and are collectively more prevalent. At the citywide level, almost half (46 per cent) of MDR and all HDR net new dwellings were located in nodes or corridors. In the redeveloping area, the majority (61 per cent) of net new MDR and all net new HDR dwellings were located in nodes or corridors. Only 34 per cent of MDR in the developing area were located in a node or corridor and there have been no HDR developments since The City Plan's approval. Further information on density types can be found in the Density and Built Form section of this report.

BUILT FORM

Density and Built Form

Most net new dwellings approved in Edmonton in 2024 were LDR (70 per cent), although single detached dwellings made up less than half of the total LDR, pointing to a shift to a greater share of other LDR types. MDR made up 28 per cent, with HDR making up the final two per cent. The share of LDR has fluctuated (up to 10 percentage points) over the past five years without a clear shift towards an increasing or decreasing share. There has been some variation (up to seven percentage points) between MDR and HDR that was primarily driven by individual HDR developments.

Low density development dominated the developing area in 2024 (73 per cent of net new dwelling units), while the remainder were MDR (27 per cent of net new dwelling units) (Figure 5). Low density types included single detached houses (36 per cent of area total), semi-detached houses (four per cent of area total), row houses (14 per cent of area total), and secondary suites or backyard houses (19 per cent of area total).

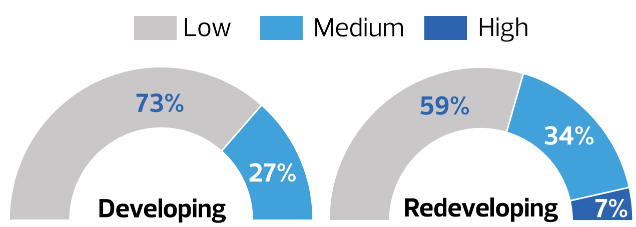


Figure 5. Net New Dwellings by Density Type in Developing and Redeveloping Areas (2024)

The redeveloping area had a greater variation of net new dwelling types. Low density made up 59 per cent, medium density made up 34 per cent and the remaining seven per cent were high density (Figure 5). Over 60 per cent of all the net new low density dwellings in the redeveloping area were secondary suites or backyard houses, and the remainder were row houses and semi-detached houses. There was a net reduction in single-detached houses in the redeveloping area (-8 per cent of the redeveloping area low density types in 2024) likely as a result of redevelopment. The 2024 Redeveloping Area Infill Report includes further details.

A comparison of the proportion of net new dwelling unit types by development pattern area versus citywide reveals that single detached houses were over represented in the developing area. All net new single detached houses were approved in the developing area, but only 77 per cent of all net new dwellings were

10 Refer to the Building Permit Dashboard for annual counts of Apartment and Mixed Use net new dwellings citywide and/or by development pattern area.

in the developing area. In contrast, secondary suites and backyard houses were disproportionately higher in the redeveloping area as 39 per cent of them were approved in the redeveloping area, but only 23 per cent of total net new dwellings were in that development pattern area.

Since The City Plan was approved, about 71 per cent of total approved net new dwellings have been low density, 24 per cent were medium density, and five per cent were high density. All high density dwellings were approved in nodes or corridors in the redeveloping area.

Ten-year analysis of changes in building types in Edmonton (Figure 6A, B and C) shows that Edmonton's housing market is slowly but gradually changing, which is resulting in a greater variety of housing options. This expansion in choice is noticeable since The City Plan was approved and accelerated with the new Zoning Bylaw 20001. While both development pattern areas are growing, they are evolving in different ways, reflecting their distinct stages of development.

In the redeveloping area, growth in the number of dwelling units has been driven by apartments, and to a noticeable extent, row houses (Figure 6B). Building medium and high-density projects require more time to plan, finance and build than other housing types, and when they are approved, they result in a large count of dwelling units. This means there are more year-over-year fluctuations in the annual total net new dwelling in the redeveloping area. In contrast, growth in the number of dwelling units in the developing area has continued at a mostly steady and predictable pace, driven mainly by single detached dwellings (Figure 6C).

Of all dwelling types, secondary suites and backyard houses showed the most significant change citywide as well as in both development pattern areas. Between 2015 and 2024, the share of net new secondary suites and backyard houses has grown from five per cent to 24 per cent citywide, from 16 to 40 per cent in the redeveloping area, and from two to 19 per cent in the developing area.

Zoning and Built Form

2024 was the first full year that Zoning Bylaw 20001 was in effect. Forty-two (42) per cent of total net new dwellings citywide, the largest proportion of all net new dwellings, were approved in the Small Scale Flex (RSF) Residential Zone (almost all net new dwellings in the RSF zone were located in the developing area; 59 per cent of net new dwellings in the RSF zone citywide were single detached houses). Twelve (12) per cent of total net new dwellings were approved in the Small Scale (RS) Residential Zone (almost all were located in the redeveloping area). Fifty-nine (59) per cent of the net new dwellings in the RS zone citywide were secondary suites. Twenty-six (26) per cent of total net new dwellings were approved in

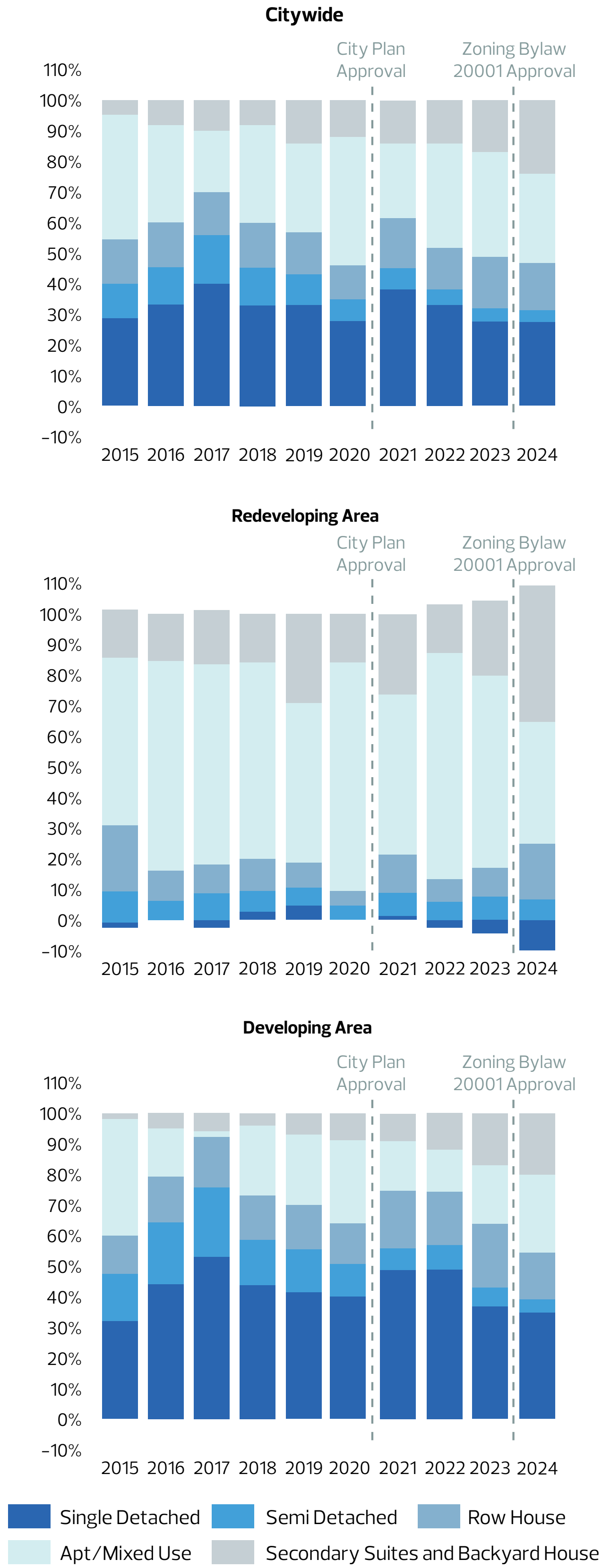


Figure 6. Changes in Building Type in (A) Citywide, (B) Redeveloping Area and (C) Developing Area (2015-2024)

the Medium Scale (RM) Residential Zone (75 per cent of which were apartments/mixed use). Eleven (11) per cent were permitted in a direct control (DC/DC1/DC2) zone, compared to about 20 per cent in 2023.

Of the dwellings permitted in direct control zones, 55 per cent were apartments/mixed use, 17 per cent were row houses, 17 per cent were single detached or semi-detached houses and 11 per cent were secondary suites or backyard houses. Remaining net new dwellings were permitted in Special Areas zones (i.e. Griesbach, Riverview, Blatchford Area) and commercial zones that allow residential development.

As the RS and RSF zones permit similar dwellings types, the proportion of net new dwellings in small scale zones was similar between the developing and redeveloping areas.

The predominant difference unique to the developing area was the relatively larger proportion of dwellings in medium scale (RSM, RM) zones. This zoning type is associated with high apartment/mixed use counts.

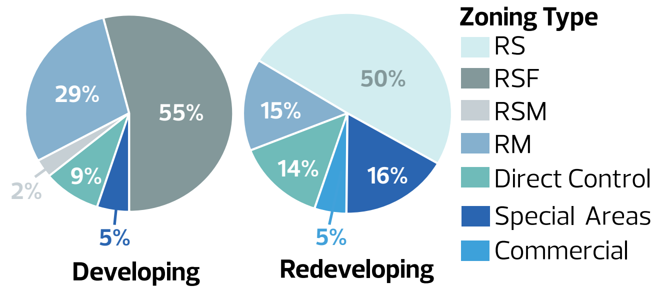


Figure 7. Net New Dwellings by Zone in Developing and Redeveloping Areas (2024)

In contrast, the redeveloping area had a larger proportion of dwelling units in Direct Control, Commercial and Special Areas zones (Figure 7). All three zones could include small, medium, or large scale dwellings types, but in 2024 they were particularly associated with apartments/mixed use buildings in Griesbach, Downtown, Queen Alexandra, Baranow, Wîhkwêntôwin and Scona.

APPENDIX 1: APPROVED NET NEW DWELLINGS BY PLANNING DISTRICTS AND NODES/CORRIDORS TYPES (2024)

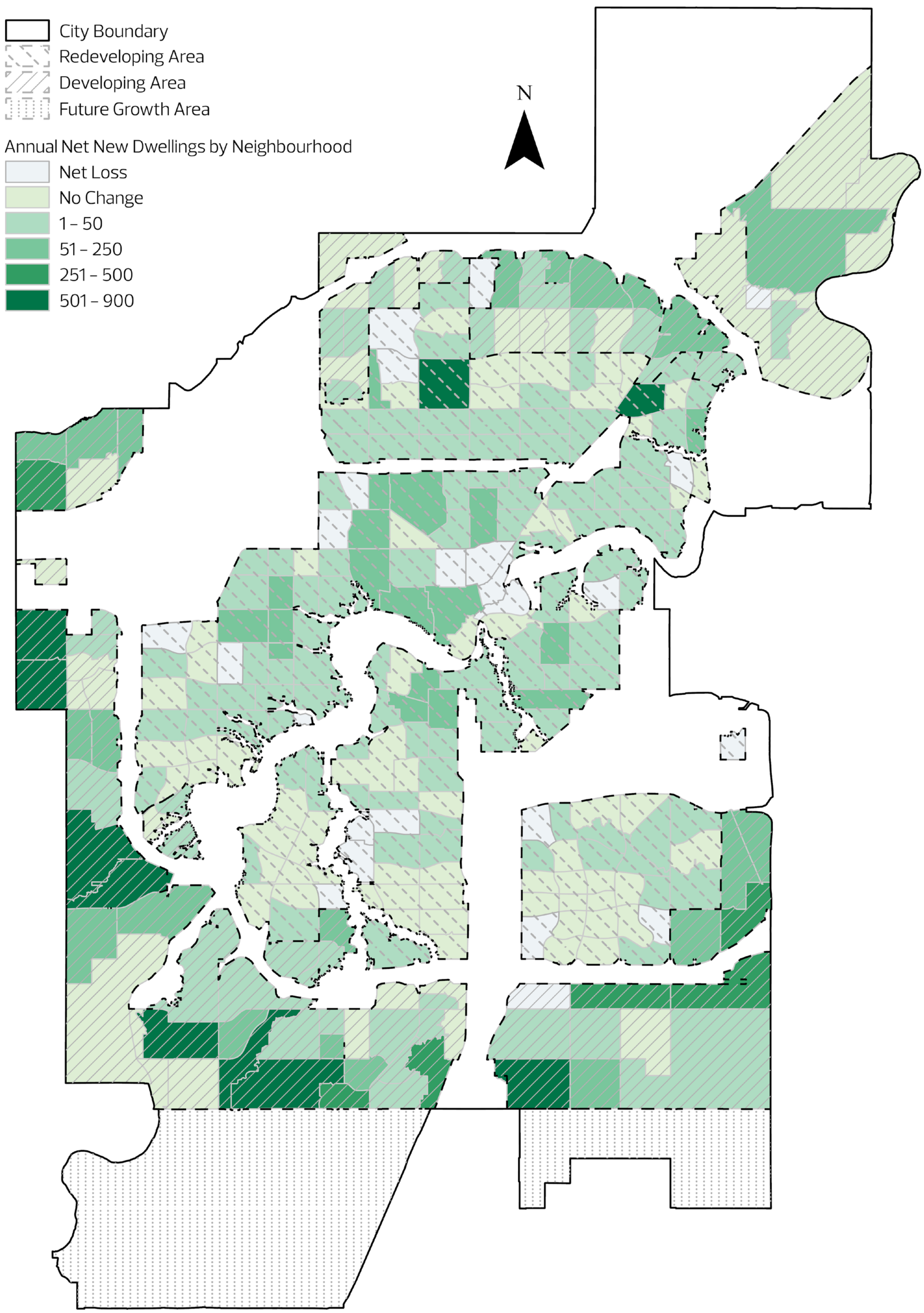
2024	Count: Permitted Net New Dwellings				Percentage: Permitted Net New Dwellings		
Density Type	Total	Low	Medium	High	Low (%)	Medium (%)	High (%)
Planning Districts							
Central	549	308	150	91	56	27	17
Ellerslie	1,946	1,432	514	0	74	26	0
Horse Hill	225	225	0	0	100	0	0
Jasper Place	484	415	66	3	86	14	<1
Mill Woods and Meadows	658	572	86	0	87	13	0
North Central	549	501	48	0	91	9	0
Northeast	1,730	1,026	704	0	59	41	0
Northwest	970	406	564	0	42	58	0
Scona	635	338	132	165	53	21	26
Southeast	316	221	95	0	70	30	0
Southwest	3,151	2,370	781	0	75	25	0
West Edmonton	20	20	0	0	100	0	0
West Henday	3,878	2,790	1,088	0	72	28	0
Whitemud	79	-17	96	0	-22	122	0
Nodes and Corridors Types							
Centre City	228	-11	148	91	-5	65	40
Major Nodes	852	106	746	0	12	88	0
District Nodes	790	61	729	0	8	92	0
Primary Corridors	473	218	88	167	46	19	35
Secondary Corridors	660	176	481	3	27	73	<1

Note i: Low Density Residential (LDR) is backyard houses, secondary suites, single detached houses, semi-detached houses, and row houses; Medium Density Residential (MDR) is apartments/mixed use in buildings with less than nine floors; High Density Residential (HDR) is apartments/mixed use in buildings with nine or more floors.

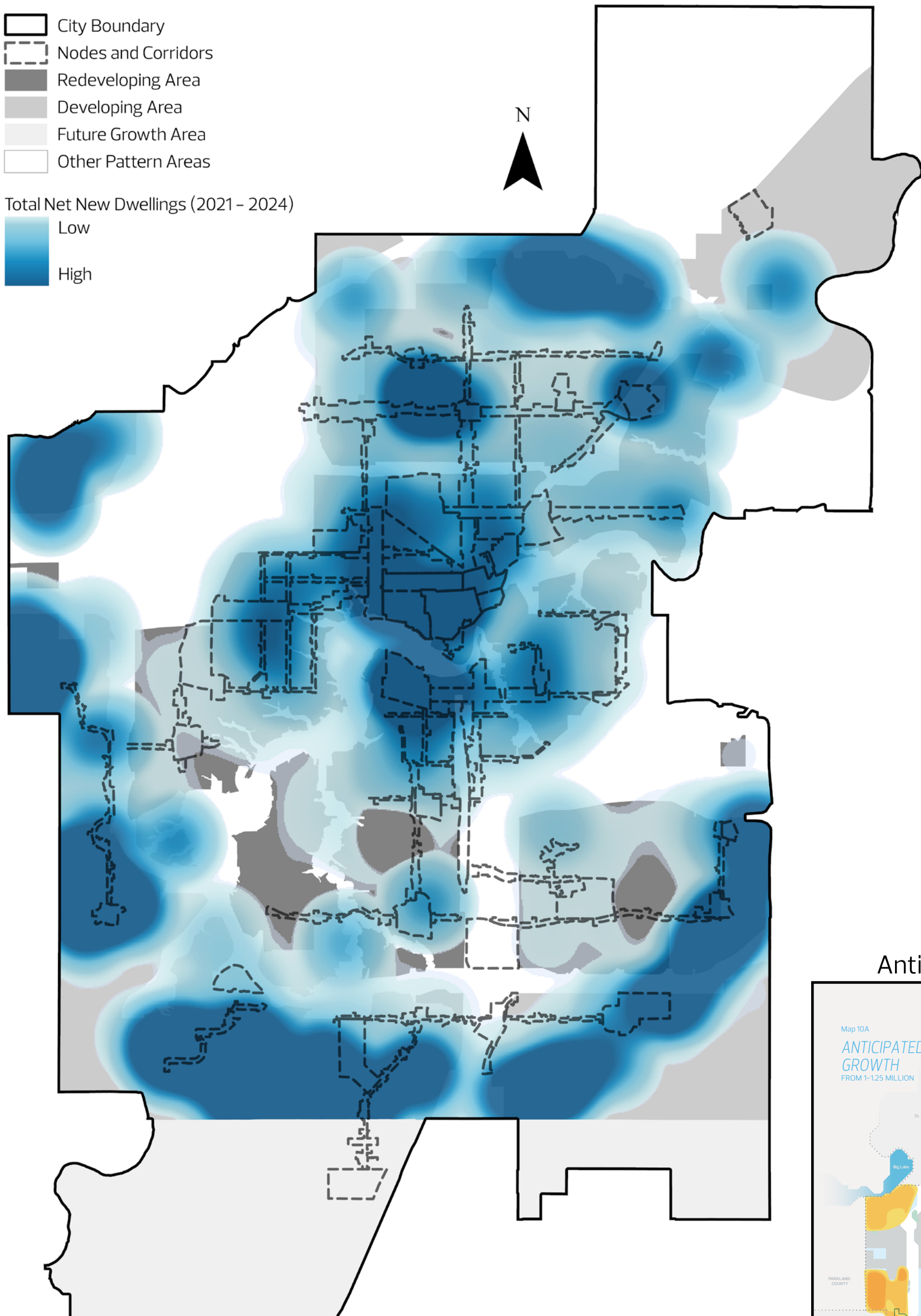
Note ii: The percentages show the overall change (net new) in the number of units for each of the three density categories. They are calculated by dividing the counts of each building type by the total count of net new of their respective geographies (shown in this table). Positive percentages indicate new construction, while negative percentages reflect demolitions. Since percentages are based on the net change (Total, Count: Permitted Net New Dwellings), the sum of positive percentages in a row can exceed 100 per cent.

Note iii: Proportional analysis may not add up to 100 per cent due to rounding.

APPENDIX 2: APPROVED NET NEW DWELLINGS BY NEIGHBOURHOOD (2024)



APPENDIX 3: TOTAL APPROVED NET NEW DWELLINGS (2021 – 2024)



The City Plan Map 10A

Anticipated Growth From 1–1.25 Million