Winnipeg

2023 Complete Communities Land Monitoring Report

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1. Executive Summary

The *2023 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.

In 2022, 53% of all permits issued for the construction of new residential dwelling units were located in the intensification target area, while the last five years has seen an annual average of 58%. In fact, the City has exceeded CCDS' 50% target in each of the last five years. Based on the City's most recent 25-Year Population, Housing, and Employment Projections released in 2023, its intensification rate can be expected to consistently surpass 50% over the next 25 years. In 2022, permits were issued for the construction of 141 dwelling units Downtown. While this fell short of CCDS 2.0's 350-unit target, the City has averaged 427 units per year over the last five years. These intensification rates can be largely attributed to increased multifamily development relative to historical averages.

In 2022, 59% of new residential units were accommodated in apartment dwelling types, as opposed to 27% in single-detached, 7% in rowhouse, and 5% in semi-detached dwellings.

The City of Winnipeg has a healthy supply of vacant greenfield residential land, with its supplies exceeding all targets in CCDS 2.0. The City has an estimated 13.5 year supply of vacant planned land (compared to its 10-year target), 10 years of vacant serviced land (compared to a target of five-to-seven years), and 6.5 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 from last year, as losses through a year of absorption were offset by gains and re-categorization of supply.

These greenfield land supplies and targets should serve as the basis for the timing of future precinct planning processes and growth-enabling infrastructure, which will be needed over time to maintain this healthy supply. But while a healthy supply is needed to accommodate forecasted housing demand, particularly for ground-oriented dwelling units that are difficult to accommodate at a large scale in infill areas, it is also important to manage against excessive supply to help manage competing demands for limited City-funded growth-enabling and -supportive infrastructure, planning resources, and City operating costs.

This report identifies 344 acres of unencumbered, shovel-ready vacant industrial land in the City of Winnipeg. This translates into 5.6 years of supply. Additional supply exists in sites with higher levels of constraints, including those with higher levels of encumbrances, those that may be regionally serviced but locally unserviced, those that may be designated for employment uses but not zoned, and where a reasonable amount of intensification could occur on existing occupied sites. While these supplies may seem reasonable at a glance, they fail to tell the full story. CCDS 2.0 Employment Lands policies direct the City to provide a sufficient supply to accommodate forecasted industrial growth and promote competitiveness and economic diversity. Industrial supply is highly sensitive to user preferences, who may require specific characteristics such as desired quadrant, minimum site size, direct access to major transportation corridors, etc., all of which can limit the quantity of land available to satisfy demand at a given time. To some extent,

the City's existing supply may not be desirable to potential users. It is also additionally limited by the fact that much of it may not be actively marketed at a given time or held by an owner willing to sell. Additional supply stands to be added with the servicing of the first phase of CentrePort South, which is funded and is currently being designed.

This report identifies 578 acres of vacant commercial land in the City of Winnipeg, representing 27 years of supply. This supply is comprised of vacant commercial-zoned land, vacant land located in Regional Mixed Use Centres and commercial Emerging Sites whose commercial rezoning has been approved by Council but has not yet come into force, and the continued build-out of underdeveloped sites. These results affirm the continued persistence of an oversupply of commercial land first identified in the *2018 Employment and Commercial Lands Study*. This study warned of the potential consequences of such a surplus, noting that, "this surplus of commercial land will affect retail commercial intensification development opportunities in Winnipeg", and that, "it is anticipated that there will be limited market-related incentive to develop retail commercial space in multi-level or mixed-use formats in much of the City in the near term". It also warned that, "The City may wish to be cautious about making additional commercial lands available for development at this time, as an oversupply of developable land may result in commercial uses being 'cannibalized' and relocated from existing commercial areas"[1].

Additional residential and non-residential development activity trends are described throughout the report. Development activity and land supplies are accurate as of January 1, 2023.

The report concludes with a growth management section to link the City's development activity and land supplies with CCDS 2.0 implementation. The first subsection describes actions undertaken by the City in the past year to help achieve the intensification target. Actions include financial incentives, infrastructure investment, and planning. The second subsection provides an update to the Greenfield Development Opportunities and Constraints table. Included in the Appendix of CCDS 2.0, it helps communicate and implement greenfield phasing policies by highlighting vital information to guide future decision-making, including anticipated City infrastructure investments. The third subsection forecasts the recommended timing of growth-enabling infrastructure and plans in order to maintain healthy residential land supplies achieve Council targets. This section was prepared in coordination with the *2024 Infrastructure Plan*.

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

2. Introduction

The *2023 Complete Communities Land Monitoring Report* seeks to provide an accurate picture of recent residential and non-residential development activity and estimated land supplies. In doing so, it is intended to support the implementation of *OurWinnipeg 2045*, the City's development plan, and *Complete Communities 2.0* (CCDS), its citywide secondary plan guiding land use and development, as a resource to promote better policy and decision-making. It is intended to be updated annually. In particular, this report will help implement CCDS' General Growth policies, including:

- Prioritizing growth in areas that best support Complete Communities principles;
- Accommodating market demand for new housing;
- Providing for predictable development through the timely delivery of City-funded growth-enabling and growth-supportive infrastructure; and
- Optimizing existing infrastructure and services (Policy 1.1, General Growth).

More specifically, it is a direct response to Policy 5.2 of the General Growth section, which directs the Public Service to undertake this.

Monitor and report on development trends
5.2 (A) Report annually to Council on: a. Residential development patterns and the City's progress towards achieving the intensification target; b. Actions undertaken by the City in the previous year aimed at achieving the intensification target; c. The supply of vacant serviced and planned greenfield land; d. Changes to conditions described in the table of greenfield development opportunities and constraints contained in Appendix A; and e. Other contextual economic measures as appropriate.
5.3 Collaborate with the development industry to refine the City's understanding of its residential land supply and timing requirements.

Figure 2 -1: Section 5.2 of the General Growth section of Complete Communities 2.0

In providing this information, it strives to provide methodological transparency to promote greater understanding and to establish a baseline for continued discussions with the development industry and other stakeholders on how to improve.

Critical to forecasting land supplies are demand forecasts. A significant input is the City's *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area*, which was released in Q1 2023. Its baseline scenario forecasts the City of Winnipeg to reach a population of 1,013,100 people by 2047, during which it can be expected to accommodate approximately 98,000 new dwelling units. Additional demand forecasts

based on based on recent development trends were also considered. Existing market uncertainty related to increasing interest rates was acknowledged in selecting preferred demand scenarios.

For employment demand, this report relied on long-range employment land forecasts prepared by urbanMetrics Inc. in 2021 for the Winnipeg Metropolitan Region in support of its Plan 20-50, a long-term regional growth and servicing plan for the wider region. It forecasted the City of Winnipeg to accommodate between 91,000 and 125,000 new jobs from 2021 to 2051, including demand for approximately 2,000 acres of employment lands during this time period. Forecasts for warranted retail/commercial space were derived from the City's *2018 Employment and Commercial Lands Study*.

The City of Winnipeg Public Service regularly produces comprehensive economic and demographic information in its Community Trends reports, which are prepared in support of annual budget processes. These reports include data on updated population trends, residential housing and commercial markets, economic trends, and City revenue, expenditures, and debt, and should be referenced as the go-to resource on these contextual measures.

This report's inventory was prepared in consultation with industry stakeholders. The greenfield residential inventory was refined through close collaboration with the Urban Development Institute Manitoba.

The figures contained in the report represent the City's best understanding at the time of authorship. Going forward, errors may be found or refinements may be made which may warrant changes to the data in this report. These changes will be addressed in future versions of the report. Owing to this, there may be discrepancies between this, past, and future reports.

3. Policy Context

3.1 OurWinnipeg 2045

OurWinnipeg 2045 fulfills the Province's requirement as prescribed by Section 224 of the *City of Winnipeg Charter* that the City adopt a development plan by by-law to set out its long-term plans and policies respecting its purposes, its physical, social, environmental, and economic objectives, and land use and development. OurWinnipeg serves to align all other statutory and strategic City documents with the organization's long-term vision.

OurWinnipeg 2045's vision is to be a thriving, sustainable, and resilient city, grounded in a strong commitment for human rights, that is welcoming and contributes to an equitable and high quality of life for all. It localizes 17 United Nations Sustainable Development Goals into six goals for Winnipeg: Leadership and Good Governance, Environmental Resilience, Economic Prosperity, Good Health and Well-Being, Social Equity, and City Building.

OurWinnipeg 2045 policies in support of City land monitoring activities are described in Figure 3-1 below:

Goal	No.	Policy
Leadership and Good Governance	1.4	**Integrated Knowledge and Resources** Coordinate inter-departmental systems, projects, and resources, making the best use of internal and external expertise to better understand service needs, find the most appropriate solutions, optimize resources, and maximize community outcomes.
	1.5	**Evidence-Informed Decisions** Invest in data and technology in order to support objective, evidence-informed decision-making; support open government and open data principles for collection and sharing; help coordinate records and information management; and improve process efficiency, results-based service delivery, and accountability.
Economic Prosperity	3.5	**Strategic Enterprise Supports** Invest in employment lands servicing based on an analysis of municipal and regional supply, municipal return on investment, and future land requirements in industry sectors that are integral to achieving sustainable, local economic growth.
City Building	6.6	**Intensification Target** Achieve the intensification target by making development in intensification target areas easier and more desirable and predictable, as directed by Complete Communities.

Goal	No.	Policy
City Building	6.8	**Plan for and Accommodate Forecasted Growth** Provide for predictable development through the timely delivery of City-funded growth-enabling and growth-supportive infrastructure, within the City's financial capacity.
	6.14	**Greenfield Phasing** Provide for timely capital infrastructure and local area plans to enable and support the full build out of greenfield lands in accordance with Complete Communities greenfield phasing policies.

Figure 3-1: Applicable OurWinnipeg 2045 policies

3.2 Complete Communities 2.0

As a city-wide secondary plan, *Complete Communities 2.0* (CCDS) compliments and builds on the vision established in OurWinnipeg 2045 by guiding growth, development, and land use with a much greater level of detail. CCDS is based on an Urban Structure, which is a spatial representation of different areas of the city communicating existing characteristics and visions for future development.

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

Section	Policy
General Growth	**Setting an intensification target** 2.1 Aim for a minimum of 50% of all new dwelling units to be located in the intensification target area. 2.2 Aim to establish a minimum of 350 new dwelling units per year in the Downtown each year until 2030, and 500 dwelling units per year after 2030.
	Maintain vacant serviced greenfield land 4.1 Maintain a five-to-seven year supply of vacant serviced greenfield land. 4.1.1 Maintain a three-to-five year supply of vacant serviced greenfield land where all growth-enabling infrastructure is installed and the subdivision by-law is approved. 4.1.2 Consider timelines for infrastructure planning, design, and construction in managing these targets.

Section	Policy
General Growth	**Maintain planned greenfield land** 4.2 Maintain approximately a 10-year supply of planned greenfield land to support a well-functioning, competitive land market throughout the City and to manage competing demands for City local area planning resources and growth-supportive infrastructure. 4.2.1 Endeavour to provide a reasonable land supply in each quadrant of the City. 4.2.2 When allocating resources for local area planning to ensure conformance with Policy 4.2, consider the rate at which individual sites are likely to build out. 4.2.3 Consider timelines for the completion and approval of a growth-enabling secondary plan in managing this target.
	Phasing of greenfield land 4.3 Provide for timely capital infrastructure and local area plans to enable and support the full build out of greenfield lands in accordance with the greenfield phasing plan noted in Policy 4.4 and Map 3 and in accordance with Policies 4.1 and 4.2.
	Update population and housing forecasts 5.1 (A) Undertake updated long-run population and housing forecasts at least once every five years to serve as a common basis for all long-range planning activities undertaken by the City.
	Monitor and report on development trends 5.2(A) Report annually to Council on: a. Residential development patterns and the City's progress towards achieving the intensification target; b. Actions undertaken by the City in the previous year aimed at achieving the intensification target; c. The supply of vacant serviced and planned greenfield land; d. Changes to conditions described in the table of greenfield development opportunities and constraints contained in Appendix A; and e. Other contextual economic measures as appropriate. 5.3 Collaborate with the development industry to refine the City's understanding of its residential land supply and timing requirements.
Financing Growth	**Capital projects** 2.1 Understand and plan for the full lifecycle cost of capital investments and services in advance of development approval and capital procurement. 2.1.1 Align and prioritize City investment in capital projects based on the strategic priorities of the City as outlined in OurWinnipeg, this By-law, the Infrastructure Plan, the capital budget, and on the overall fiscal realities identified through the budget process.

Section	Policy
	2.1.2 Align capital project planning with the development priorities and phasing policies of this By-law. 2.1.3 Identify and evaluate each capital project to determine its growth-related components and the City's share of costs.
Commercial Areas and Mixed Use Centres	**Creating a new Regional Mixed Use Centre** 3.2.2 In addition to satisfying the criteria in Policy 1.5, require that proposals to create a new Regional Mixed Use Centre show: a. The City's overall supply of commercial lands, demand for new commercial space over the time horizon of this By-law, and the potential impact of the proposed development on the City's goals of supporting and intensifying existing commercial areas; b. How the proposed Regional Mixed Use Centre will be served by the Primary Transit Network; and Whether associated City capital expenditures will be required, determined in coordination with appropriate City departments.
	Creating a new Community Mixed Use Centre 4.2.1 In addition to satisfying the criteria in Policy 1.5, require that applications to create a new Community Mixed Use Centre show: a. The City's overall supply of commercial lands, demand for new commercial space over the time horizon of this By-law, and the potential impact of the proposed development on the City's goals of supporting and intensifying existing commercial areas; b. How the proposed Community Mixed Use Centre will be served by the Primary Transit Network; and c. Whether associated City capital expenditures will be required, determined in coordination with appropriate City departments.
Employment Lands	3.1 Provide a sufficient supply of vacant serviced Employment Lands to accommodate forecasted industrial growth, promote City and regional competitiveness and economic diversity, and to provide jobs in proximity to the City's population, amenities, and services.
	3.2 Regularly monitor the City's supply of Employment Lands and development activity. 3.2.1 (A) Develop a system to monitor the City's supply of Employment Lands. 3.2.2 (A) Endeavour to report on the City's supply of serviced vacant Employment Lands annually.
	3.3. Endeavour to maintain a five-year supply of combined vacant serviced General and Core Industrial lands.
	3.4 Provide a sufficient supply of large sites in Core Industrial areas.

Section	Policy
	Requests for conversions 4.2 Generally discourage the conversion of Employment Lands to other designations. 4.2.1 Prioritize the protection of General and Core industrial areas close to major transportation corridors such as railways, highways, and major arterial roads, as well as large industrial-zoned sites.
Capital Region	**Monitor land supply** 3.2 (A) Monitor land supply and the absorption of residential, commercial, and Employment Lands in the Capital Region.

Figure 3-2: Applicable Complete Communities 2.0 policies

3.3 Winnipeg Metropolitan Region Draft Plan 20-50

Section 223.1 of the *City of Winnipeg Charter Act* subjects the City of Winnipeg to Division 2 of Part 2 of the *Planning Act*, which establishes the City of Winnipeg as a member of the Capital Planning Region. The stated mandate of the Capital Planning Region is to enhance economic and social development by improving and coordinating sustainable land use and development in the region through a Regional Planning By-law. This plan must contain plans and policies respecting the physical, social, environmental, economic, and fiscal objectives for the Capital Planning Region over a 30-year time horizon. The *Planning Act* requires that the planning board must prepare and adopt a regional plan within two years of December 2022, the date in which the planning region was established. Additional information regarding plan adoption can be found in the Capital Planning Region Regulation M.R. 161/2022.

Section 10.3(2) of the *Planning Act* requires that a regional plan contain plans and policies respecting major commercial, industrial, and residential land needs, among other requirements.

To-date, the Winnipeg Metropolitan Region (WMR) has taken the lead in preparing initial drafts of the regional plan, with the most recent draft, *Plan 20-50 version 2.0 A Regional Growth Plan for the Winnipeg Metropolitan Region*, having been released publicly on November 24, 2022. The Capital Planning Region board will consider this draft for adoption as the regional plan. Once it comes into force, member municipalities will be required to bring their development plans into conformance with it.

Draft *Plan 20-50* policies speaking to the importance of this land monitoring work are described in Figure 3-3 below.

Policy Area	Policy no.	Policy
Integrated Communities and Infrastructure	1.1.1	To optimize investment in infrastructure and services, the majority of growth and development should be accommodated in the Metropolitan Core, Inner Metropolitan Area, and Urban Centres[1].
	1.1.5	To support sustainable infrastructure and servicing investment and to promote orderly compact and contiguous development supporting low carbon objectives and climate-resiliency, the majority of growth and development should: a) Be connected to existing municipal water and wastewater servicing; b) Support connectivity between existing built-up areas; c) Support density minimums and targets as per Schedule 2 (and Figure 3-4 below) for the Metropolitan Core and for greenfield area development in the Inner Metropolitan Area, Urban Centres, Rural Centres, and Settlements. d) Provide a mix of land uses in compact form; e) Promote a mix of housing types close to existing and planned local employment areas; f) Support active transportation routes and trails, with a focus on Regional Active Transportation Trails; and g) Incorporate transit and protect for future transit viability, where appropriate.
Investment and Employment	2.2.1	An adequate supply of land shall be protected by municipalities to accommodate employment projections to provide a variety of employment types and support economic diversification. Priority local employment areas (lands) shall be defined to prioritize investments.
	2.2.2	To protect the viability of local employment areas and support complete communities, the majority of employment uses will be directed to: a) Regional Employment Areas[2] as identified in Schedule 6 and existing local employment areas; b) The Metropolitan Core, Inner Metropolitan Area, Urban Centres, and Rural Centres identified in Schedule 1.

[1] Draft *Plan 20-50* depicts a Regional Structure akin to *OurWinnipeg*'s Urban Structure. It is provided in Figure 3-5 below. The plan's Metropolitan Core consists of Winnipeg's Downtown, Major Redevelopment Sites, Regional Mixed Use Centres and Corridors, and existing and future Rapid Transit Corridors. The plan's Inner Metropolitan Area includes all of the City of Winnipeg in addition to portions of West St. Paul, East St. Paul, Headingley, Macdonald, and CentrePort Canada in Rosser.

[2] Within the City of Winnipeg, Regional Employment Areas include Downtown Winnipeg and CentrePort Canada, as well as health facilities, post-secondary institutions, and Regional Mixed Use Centres.

Implementation	6.6.1	The policies of this plan provide for the completion of infrastructure master plans to support growth and servicing. Municipalities should anticipate and plan for needed wastewater and water treatment capacity to accommodate municipal growth and development objectives through the adoption of conservation measures to extend existing capacity and/or the expansion of capacity. Accordingly, an integral part of planning for services is determining the status of uncommitted reserve capacity at water and wastewater treatment facilities and monitoring this capacity on an on-going basis. Municipalities responsible for wastewater and water servicing should assume responsibility for tracking, reporting, and allocating uncommitted reserve capacity, in conjunction with water conservation measures to optimize the use of this capacity. Development delays should be avoided through understanding of issues, sharing of data, and addressing requirements that can impact timing and scheduling through the development application process. Process requirements will be further refined for implementation.

Figure 3-3: Applicable draft WMR Plan 20-50 policies related to City land monitoring activities

Tier	Community	Min. residential and mixed use density (units*/acre)	Target residential and mixed use density (units*/acre)
Metropolitan Core	Downtown Winnipeg	50.2	149.7
	Major Redevelopment Sites and Centres along rapid transit lines	40.1	100
	Regional Mixed Use Centres and centres along Regional Mixed Use Corridors	34.8	100
Inner Metropolitan Area	Stable Communities, including parts of the City of Winnipeg	To be considered through the City of Winnipeg's infill strategy	
	Transformative Communities, including parts of the City of Winnipeg	4.8	9.7
* - Section 6.3.1 indicates that non-residential units may be considered; the Winnipeg Metropolitan Region will provide additional guidance.			

Figure 3-4: WMR draft Plan 20-50 minimum and target densities for the City of Winnipeg

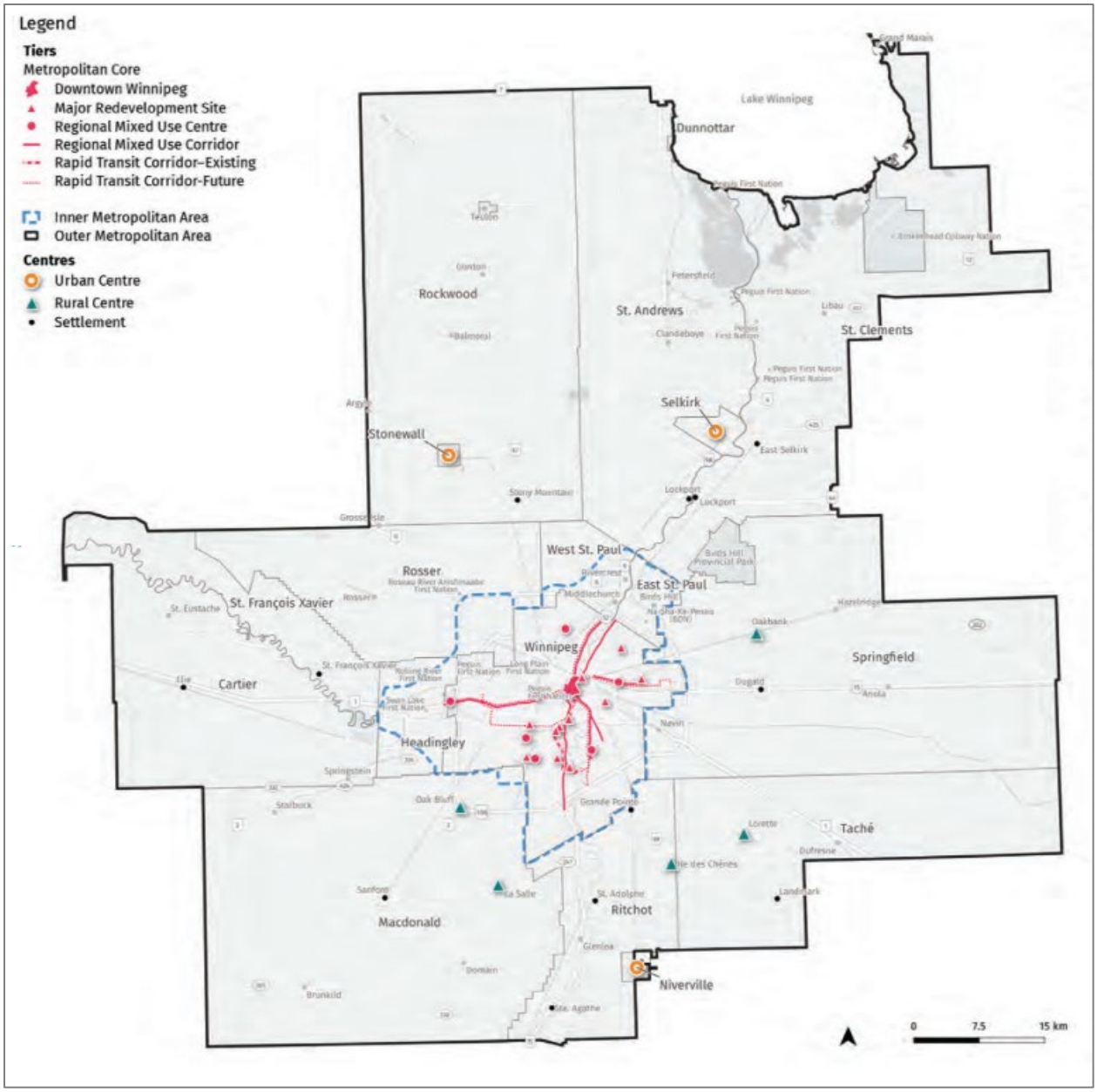

Figure 3-5: Winnipeg Metropolitan Regional Structure, draft Plan 20-50 version 2.0

4.0 Recent Industry Consultation

4.1 Engagement on 2023 Report

On March 16, 2023, the Urban Planning & Design (UP&D) Division shared initial greenfield land supply findings to the Urban Development Institute of Manitoba (UDI). This led to a series of email correspondences and meetings with individual developers over the subsequent months to refine its forecasts. On June 19, 2023, the UP&D Division met with UDI to report on 2022 development trends, updated greenfield land supply estimates, and to solicit feedback on its proposed approach to quantifying greenfield demand.

On May 23, 2023, the UP&D Division presented its initial industrial and commercial land supply findings and non-residential development trends to a group of industry stakeholders. The UP&D Division sought to understand whether any of its findings ran counter to industry experience, and if this analysis was missing anything. Comments received include:

- Similar to previous engagements, concern was expressed that the City's approach in quantifying industrial land absorption, whereby large sites are considered to be absorbed even if development occurs on only a small portion of the lot, may overrepresent development activity. While the City does not deviate from its approach in this report, which is consistent with the *2018 Employment and Commercial Lands Study (ECLS)*, it includes an additional analysis on "adjusted absorption" to address these concerns. This work also previously quantified the potential industrial land supply represented by potential for intensification in response to these concerns.
- A stakeholder asked if Winnipeg's results had been compared to other cities in different regions of the country. While the 2018 ECLS did this to an extent, this is beyond the scope of this annual report.
- Stakeholders expressed concern that this work's identified industrial land supply overrepresents land that may be available for development; only a portion may be available for purchase at a given time. The UP&D Division agrees with this assessment, and that a future analysis of marketed lands would help quantify this.
- Some stakeholders reiterated previous messaging that the City should participate in the Capital Region's economic development collaboratively and should not adopt a position that is overly protectionist and/or zero-sum.
- Stakeholders reiterated previous messaging that the City is at a competitive disadvantage with Capital Region municipalities with regards to speed and certainty of approvals.

Following this meeting, the UP&D Division received detailed industrial land supply feedback from one stakeholder. This feedback led to the refinement of this work.

On March 24, 2022, Council directed the Public Service to report on how to best align development processes, costs, and timelines between the portions of CentrePort in Winnipeg and Rosser in an effort to promote economic competitiveness. As a result, the UP&D Division

conducted stakeholder interviews in Spring 2023, which yielded some general commentary about industrial development in Winnipeg[1]:

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

4.2 Summary of Feedback from Previous Consultation Periods

Prior to finalizing the *2022 Complete Communities Land Monitoring Report*, feedback was sought from UDI on its initial residential findings. These discussions helped refine land that should be considered undevelopable, reconcile differences in City and UDI site supply forecasts with the intent of understanding rationales, and refined reporting items. More specifically, UDI feedback resulted in the following changes:

- Land supply forecasts were refined to distinguish supplies of ground-oriented units from total dwelling units;
- Site supply forecasts were refined by comparing City forecasts derived from a standardized methodology to developer plans, and as a result, parameters were established to direct when the City would deviate from its projections, and instances of City/developer discrepancies were noted; and
- Lands described as undevelopable were refined. In many cases, feedback helped capture lands planned for future development, such as future regional parks or interchanges.

Non-residential industry stakeholders have previously emphasized the following themes in consultations in advance of the 2022 report:

- There was a lack of clarity in defining industrial land absorption. While some stakeholders consider absorption to refer to the servicing of land in advance of development, this work, consistent with the 2018 ECLS, considers absorption as development of vacant parcels. Relatedly, some questioned whether it was appropriate to consider large sites as being fully absorbed if development only occurred on a small portion of the lot.

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

- The City's Capital Region analysis, which focused on recent development activity, underrepresents the large supply of serviced, ready-to-build industrial land that has been made available in surrounding rural municipalities. This large supply stands in relation to the relatively small amount of industrial land being marketed in the City of Winnipeg. More work could be undertaken to quantify this regional supply.
- Consistent with previous messages the City has received dating back to the 2018 ECLS, some stakeholders stressed the importance of regional collaboration in the accommodation of employment, and that the City should not adopt an overly protectionist/competition-oriented position.
- There was discussion on the challenges associated with measuring non-residential development, including distinguishing non-residential development that relocates existing jobs versus creating new ones. Stakeholders noted that the age of the City's industrial building space inventory as well as vacancy rates should be recognized in relation to demand for more modern features.

5.0 Residential Development Activity

5.1 Intensification Target

In 2022, 53% of all permits issued for the construction of new residential dwelling units were located in the intensification target area, as described in Map 2 of the General Growth section of *Complete Communities 2.0* (CCDS) and shown in Figure 5-3 below. For each of the last five years, the City has exceeded CCDS' 50% target.

Year	%
2018	58.4
2019	63.5
2020	53.6
2021	61.2
2022	52.6
Avg	57.9

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

Prior to 2018, the City had only exceeded 50% intensification once between 2011 and 2017. Of note is that there continues to be high variability in this distribution year-over-year; the number of new dwelling units per year is small enough that one or two large apartment developments can have an outsized influence on final percentages.

It should also be noted that, in absolute terms, the volume of greenfield development has remained relatively consistent over the last decade. Its declining overall share can be attributed to higher overall rates of infill development more recently.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	5 yr avg
Greenfield	61.0	56.7	55.7	36.4	53.0	53.1	66.9	42.6	36.9	46.8	39.6	47.7	41.4
Intensification	38.3	42.7	44.1	63.3	46.9	46.6	32.9	57.2	63.0	52.9	60.3	52.2	58.5

Notes:

- Figures are gross and do not account for demolitions.

- Greenfield figures are the sum of new dwelling units in Emerging and New Communities. Minor differences between this table and Figure 5-1 above are attributable to minor mapping discrepancies where there is overlap between Emerging Communities and Intensification Target area boundaries.

- Remaining balance of residential development activity is comprised of a small amount of development in Rural & Agricultural areas.

Figure 5-2: Percent of new residential dwelling units as greenfield and intensification, by year

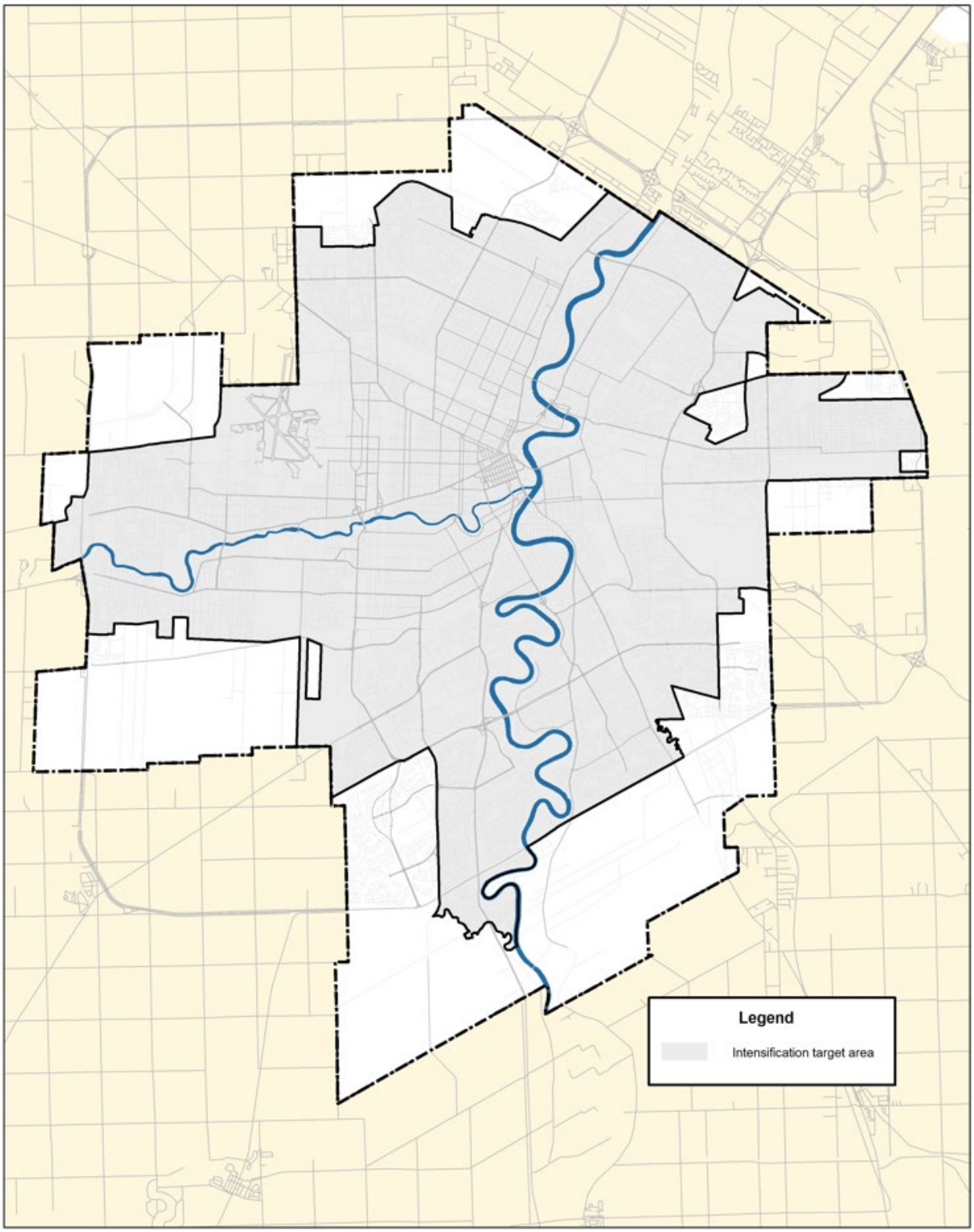

Figure 5-3: Intensification target area

This increased level of intensification relative to CCDS' intensification target can be largely explained by the increased development of multifamily units relative to the *2016 Conference Board of Canada forecast in the City of Winnipeg Population, Housing, and Economic Forecast*, which was the basis for establishing the 50% target. The greater the share of new residential dwelling units being built as multifamily dwelling types, particularly apartments, the more easily the City will be able to achieve its intensification target.

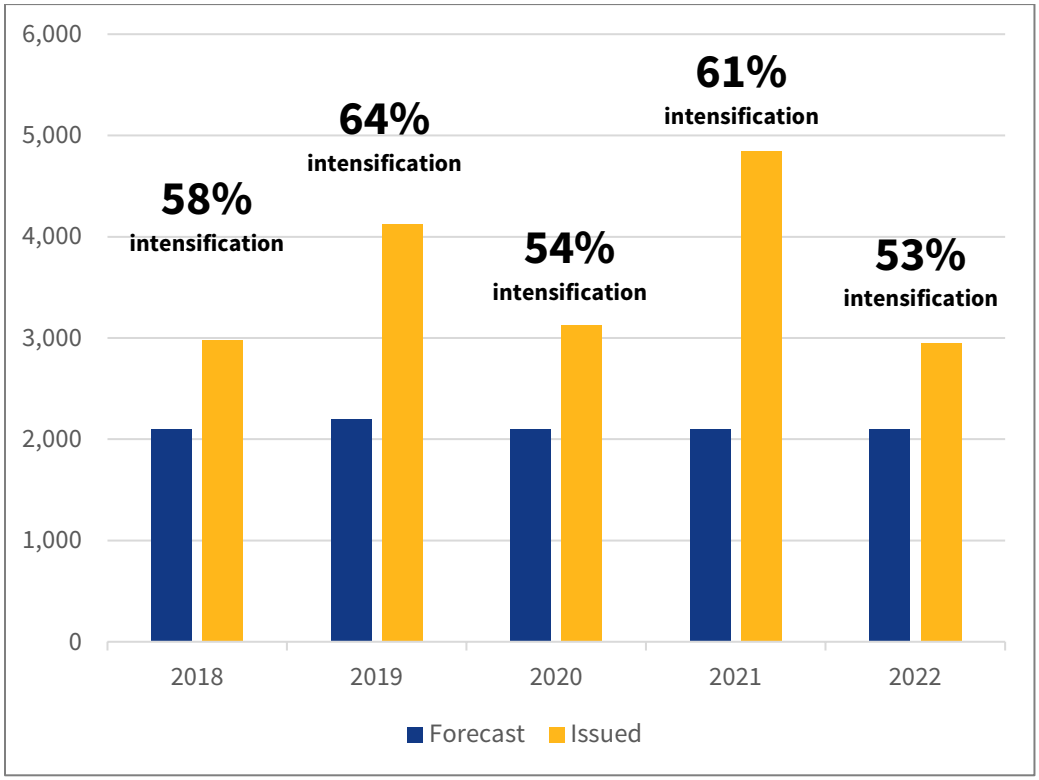

Figure 5-4: Forecasted and issued new multifamily residential dwelling units in relation to intensification rates

The City's *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area*, released by the Office of Economic Research in February 2023, produces a Low, Baseline, and High housing start forecast, dividing dwelling units into single and multi-family dwellings. Assuming the forecasted multifamily dwelling units are divided into more specific dwelling type categories (as defined in Section 5.3) in accordance with recent historical trends, and then these dwelling unit types are distributed to greenfield and infill areas also in accordance with these trends (see Figure 5-16), an intensification rate forecast can be produced. As illustrated in Figure 5-5 below, the City's 2023 housing forecast would expect intensification rates to consistently surpass its 50% target over the next 25 years.

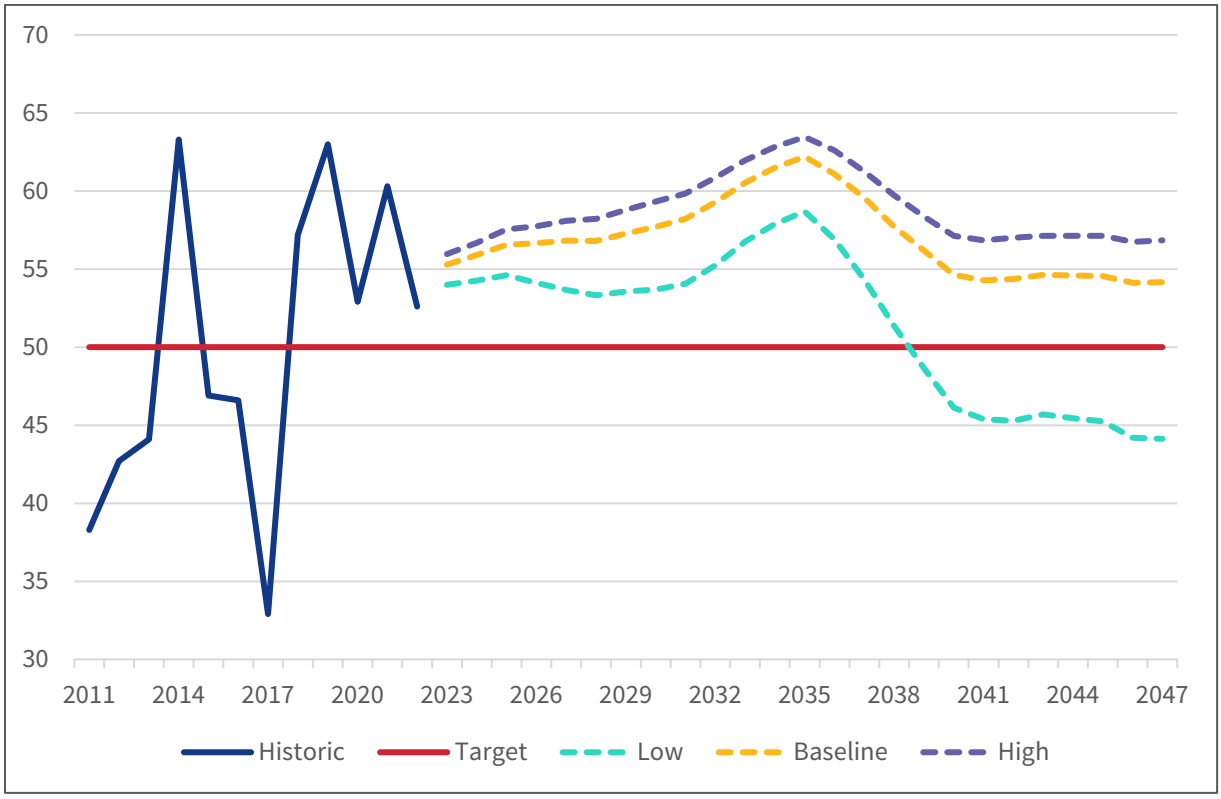

Figure 5-5: Forecasted intensification rate to 2047 based on 2023 City of Winnipeg Population, Housing, and Employment Projections

CCDS 2.0 establishes an intensification target specific to Downtown. It aims to establish a minimum of 350 new dwelling units per year until 2030, and 500 dwelling units per year after that.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	5 yr avg
Downtown	81	94	215	523	188	229	274	596	554	492	352	141	427

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

5.2 Development Activity by Urban Structure

The tables below indicates residential development activity on both total and percentage share bases in relation to the Urban Structure of CCDS 2.0 (Figure 5-11).

	2018	2019	2020	2021	2022	Avg.
CITY TOTAL	4,392	5,451	4,310	6,473	4,168	4,959
Greenfield development	**1,840**	**1,994**	**2,017**	**2,548**	**1,989**	**2,089**
Emerging Communities	1,840	1,994	2,017	2,548	1,989	2,089
New Communities	0	0	0	0	0	0
Intensification	**2,544**	**3,453**	**2,282**	**3,918**	**2,174**	**2,863**
Downtown	596	554	492	352	141	427
Major Redevelopment Sites	296	132	452	793	394	413
Corridor frontage	65	768	30	698	405	393
Urban Corridors	41	133	30	293	142	128
Regional Corridors	24	635	0	405	263	265
Established Neighbourhoods	1,587	1,999	1,308	2,075	1,234	1,629
Mature Communities	871	1,164	776	816	636	853
Recent Communities	716	835	532	1,259	598	776
Rural Agricultural	**8**	**4**	**11**	**7**	**5**	**7**

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

	2018	2019	2020	2021	2022	Avg.
Greenfield development	**42.2**	**36.6**	**46.8**	**39.4**	**47.7**	**41.4**
Emerging Communities	42.2	36.6	46.8	39.4	47.7	41.4
New Communities	0	0	0	0	0	0
Intensification	**57.7**	**63.3**	**52.9**	**60.5**	**52.2**	**58.5**
Downtown	13.5	10.2	11.4	5.4	3.4	10.1
Major Redevelopment Sites	6.7	2.4	10.5	12.3	9.5	8.0
Corridor frontage	1.5	14.1	0.7	10.8	9.7	6.8
Urban Corridors	0.9	2.4	0.7	4.5	3.4	2.1
Regional Corridors	0.5	11.6	0.0	6.3	6.3	4.6
Established Neighbourhoods	36.0	36.7	30.3	32.1	29.6	33.8
Mature Communities	19.7	21.4	18.0	12.6	15.3	17.9
Recent Communities	16.2	15.3	12.3	19.5	14.3	15.8
Rural Agricultural	**0.2**	**0.1**	**0.3**	**0.1**	**0.1**	**0.2**

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

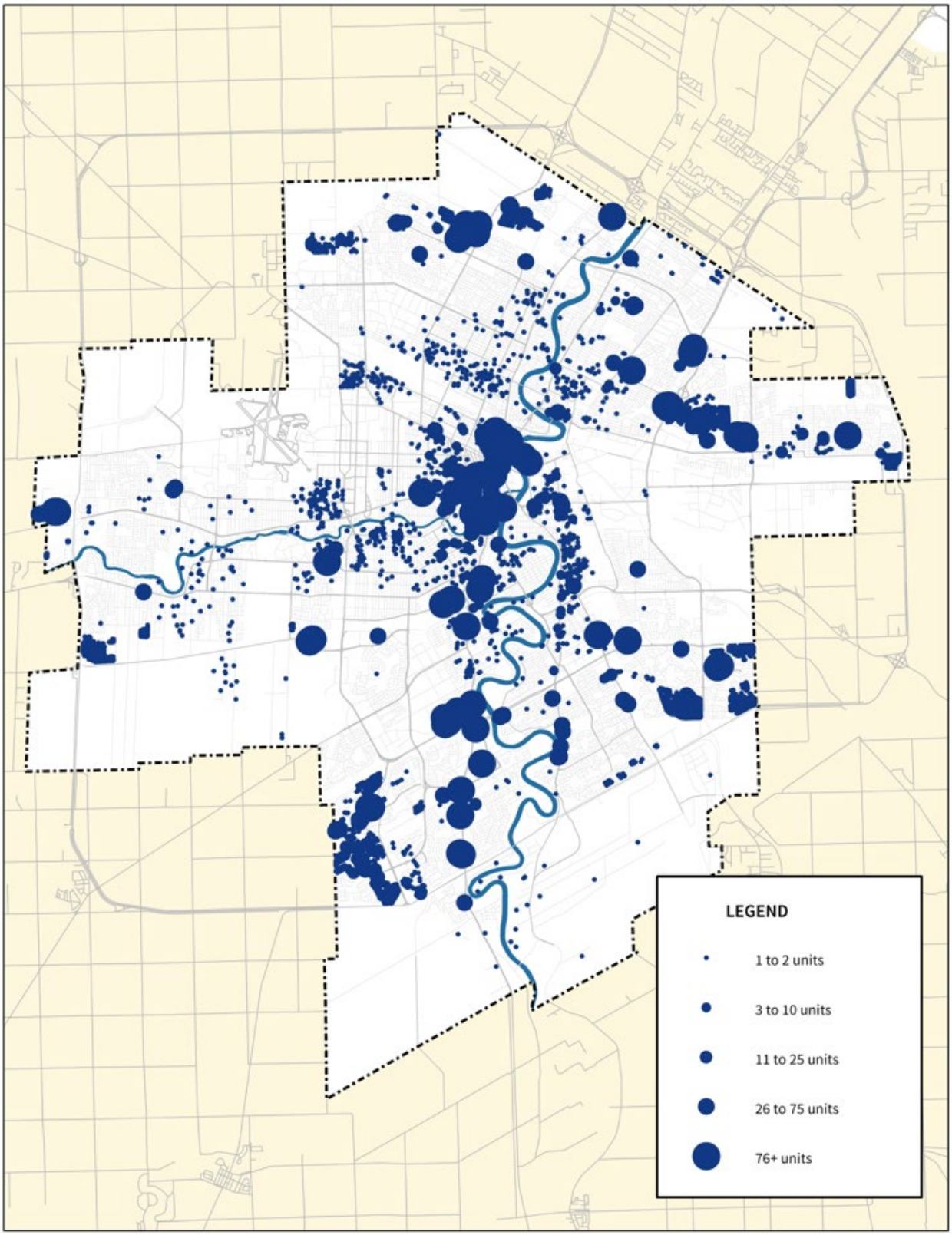

Figure 5-9: Permits issued for the construction of new residential dwelling units, 2018-22

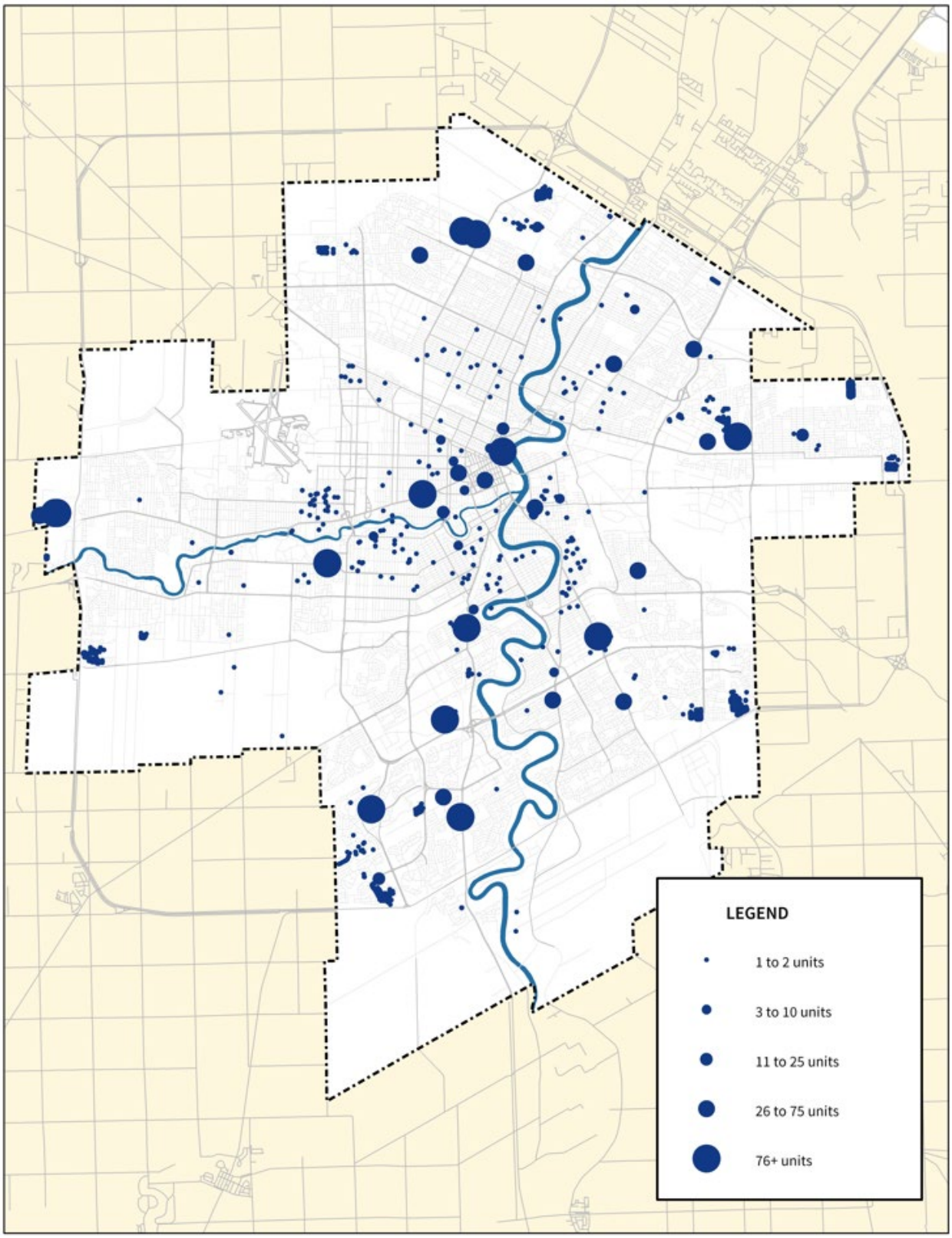

Figure 5-10: Permits issued for the construction of new residential dwelling units, 2022

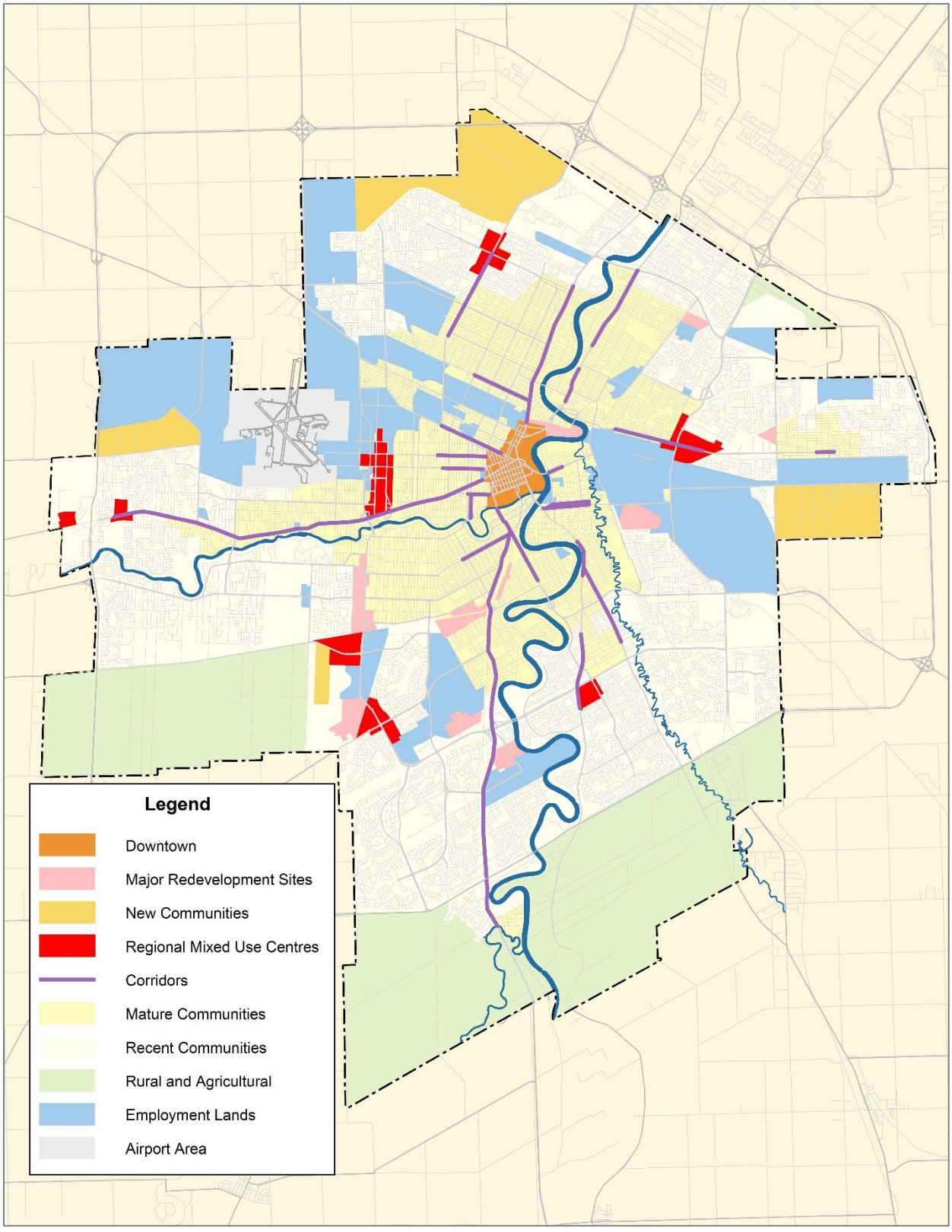

Figure 5-11: Complete Communities 2.0 Urban Structure

5.3 Development Activity by Dwelling Types

Residential development permits are classified into four dwelling types consistent with Statistics Canada definitions, as described herein.

Dwelling type	Definition
Single-detached ("singles")	Single family dwelling unattached to any other dwelling with open space on all sides and no dwelling above or below. Considered a ground-oriented dwelling unit.
Semi-detached ("semis")	One of two dwellings attached side-by-side or back-to-back to each other with no dwellings above or below it. Together, the two units have open space on all sides. Considered a ground-oriented dwelling unit.
Rowhouse ("rows")	Three or more dwellings joined side-by-side or back-to-back, but not having any other dwellings above or below. Considered a ground-oriented dwelling unit.
Apartments	Dwelling units in a form other than what is described, including everything from an up-down duplex to a high-rise apartment.
Note: Secondary suites are excluded from these definitions	

Figure 5-12: Dwelling type definitions used in this report

The chart below indicates dwelling types by year since 2016. It illustrates a large share increase in apartment units, while other dwelling types showed little variability. From 2018 to 2022, 27% (6,781) of all dwelling units were singles, while 5% were semis (1,137), 7% were rows (1,662), and 61% (15,214) were apartments. These numbers are similar to those from 2022, which saw 29% singles, 5% semis, 7% rows, and 59% apartments.

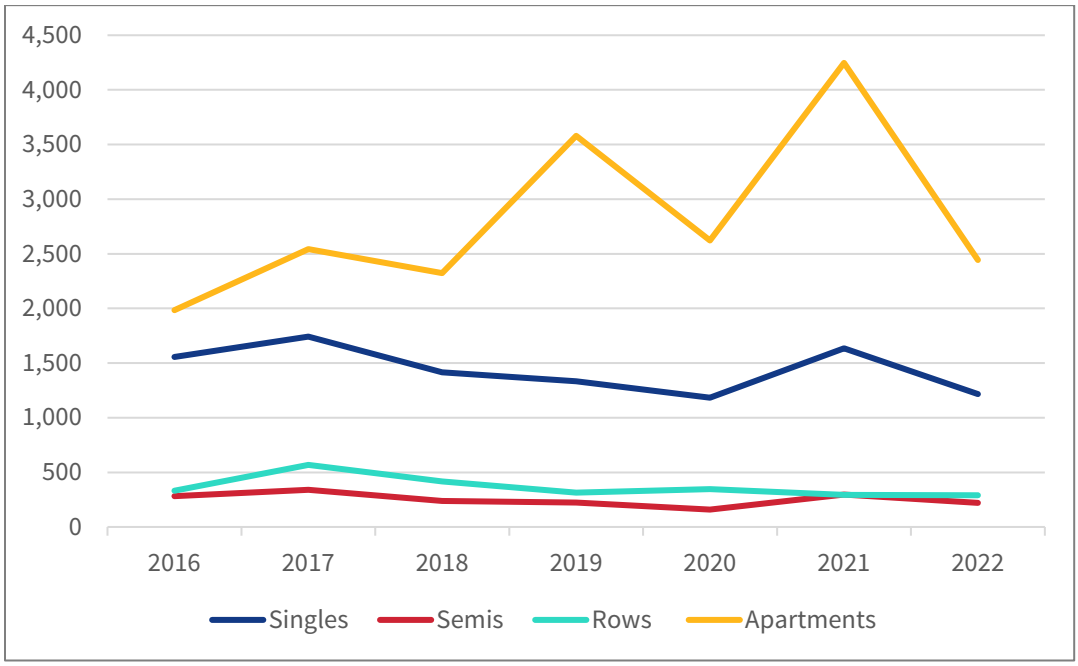

Figure 5-13: New residential units by dwelling type, by year

Year	Singles		Semis		Rows		Apartments	
	No.	%	No.	%	No.	%	No.	%
2016	1,555	37	282	7	332	8	1,984	48
2017	1,742	34	340	7	568	11	2,543	49
2018	1,415	32	239	5	416	9	2,322	53
2019	1,333	24	223	4	315	6	3,580	66
2020	1,183	27	159	4	347	8	2,621	61
2021	1,635	25	297	5	294	5	4,247	66
2022	1,215	29	219	5	290	7	2,444	59
Five-yr total	6,781	27	1,137	5	1,662	7	15,214	61

Figure 5-14: Development activity by dwelling type, 2016-22

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

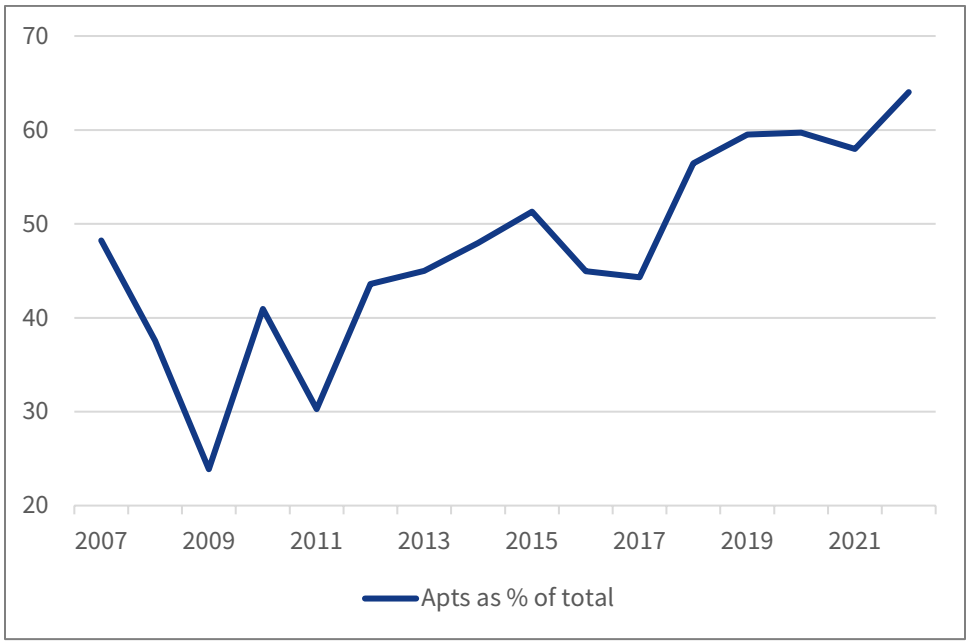

Figure 5-15: Apartments as percentage of annual total housing starts, 2007-2022 (source: CMHC Housing Market Information Portal)

The chart below indicates the share, in percentage, of all dwelling units located in intensification and greenfield areas. For example, in 2022, 21% of all new single family detached units were located in intensification areas, while 61% of all rowhouses were located in greenfield areas. The chart compares the most recent year to the average of the last five

years. These numbers illustrate the importance of greenfield areas in accommodating demand for ground-oriented dwelling units (single detached, semi-detached, and rowhouses) given the land requirements needed to accommodate these dwelling types.

Year	Category	Singles	Semis	Rows	Apartments
2022	Intensification	21	5	39	73
	Greenfield	78	95	61	27
2018-22 total	Intensification	23	13	35	79
	Greenfield	77	87	65	21

Figure 5-16: Share of all dwelling units (%) located in intensification and greenfield areas

5.4 Development Activity by Transit-Oriented Development

The following information details residential development permit activity in relation to the City's transit-oriented development objectives.

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

Figure 5-17: Permits issued for the construction of new residential dwelling units in proximity to TOD areas

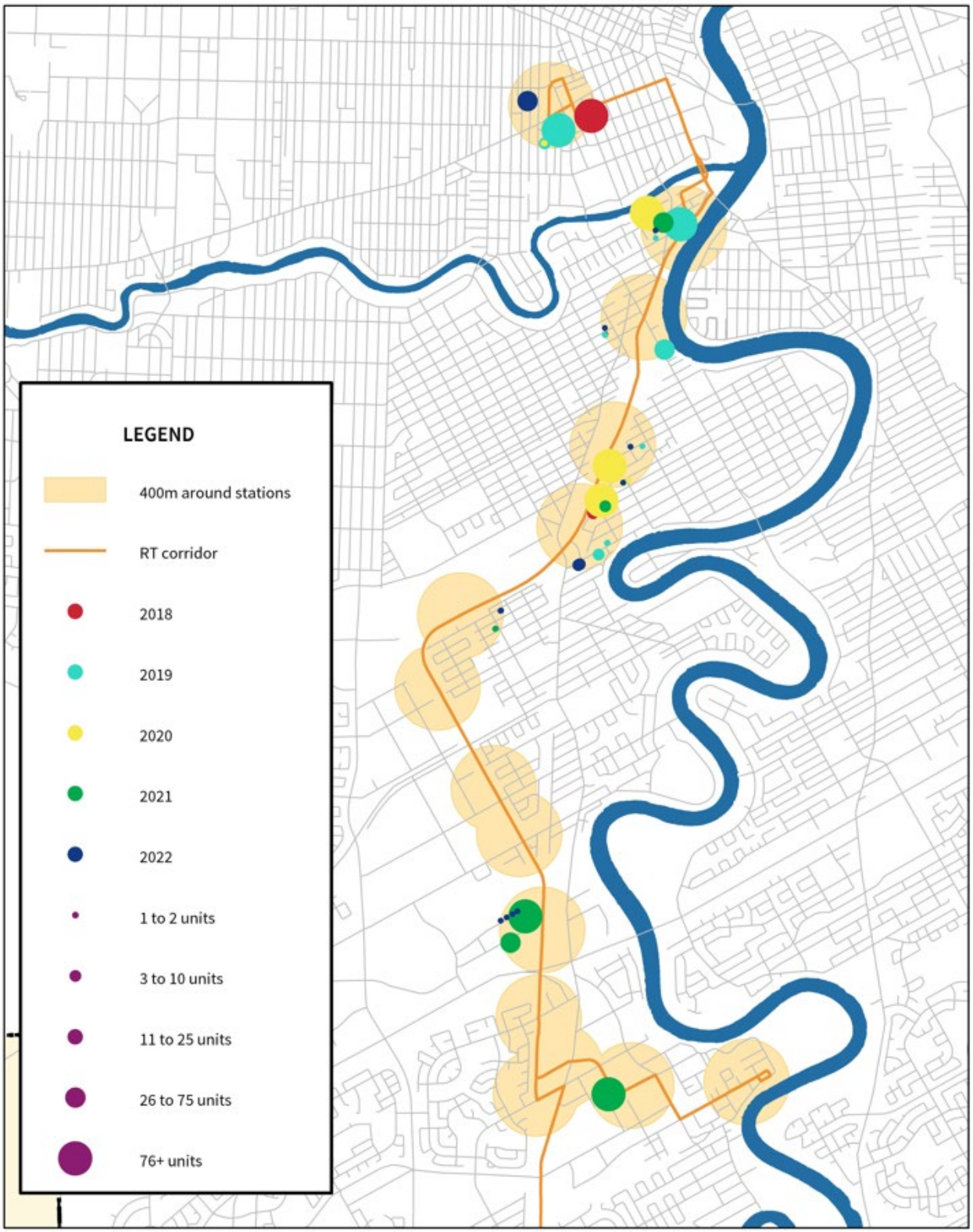

Figure 5-18: Permits issued for the construction of new residential dwelling units in proximity to rapid transit stations, 2018-22

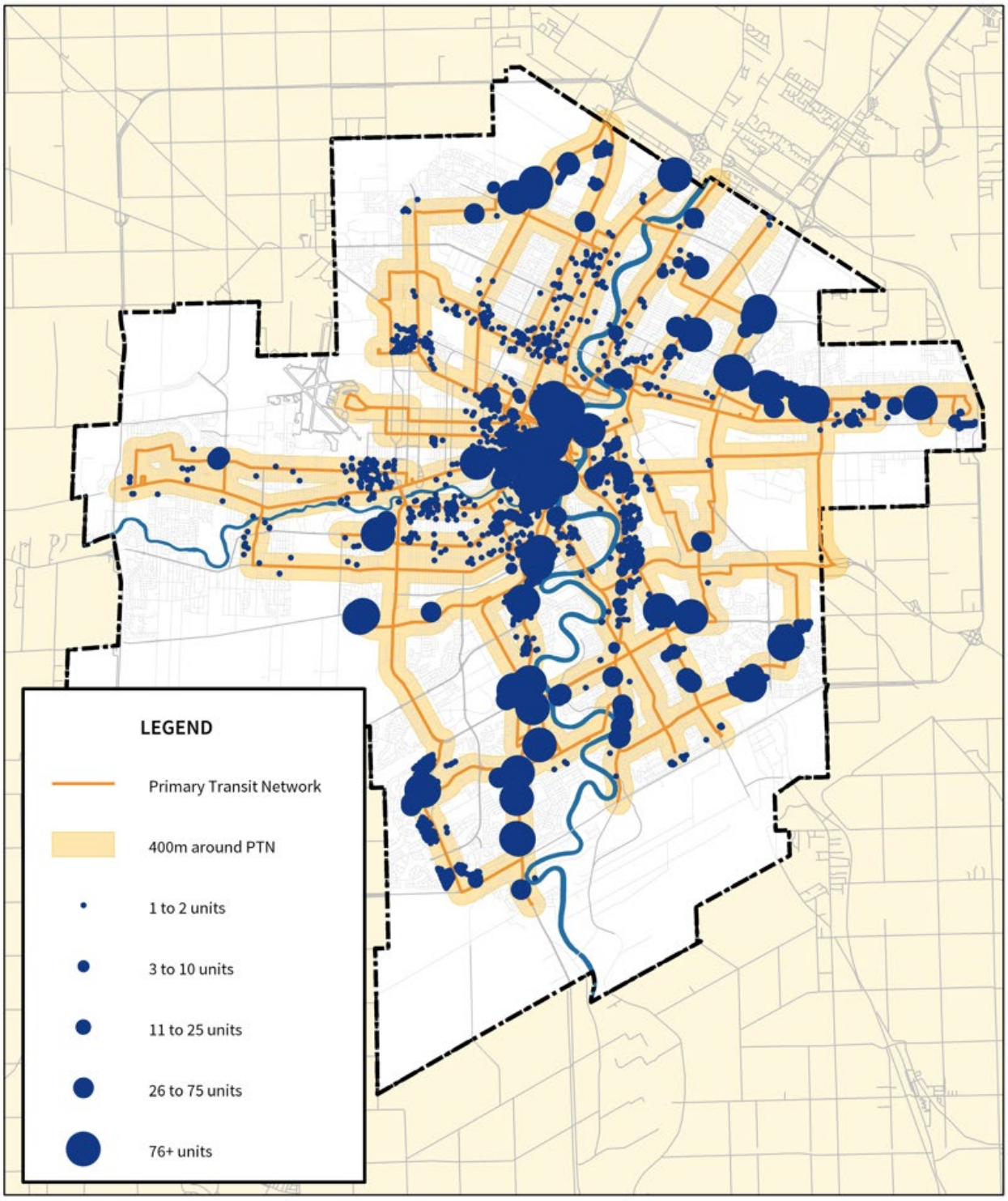

Figure 5-19: Permits issued for the construction of new residential dwelling units in proximity to the planned Primary Transit Network, 2018-22

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%	6%	92%
400m of Primary Transit Network	16%	2%	5%	76%

Figure 5-20: Permits issued for the construction of new residential dwelling units, in TOD areas, 2018-22, by dwelling type share

5.5 Development Activity by Established Neighbourhoods

The following two charts indicate neighbourhoods within both the Mature and Recent Communities designations as per CCDS 2.0 having experienced the greatest amount of development activity from 2018 to 2021, as measured by permits issued for new residential units. In Mature Communities, the largest number of new residential dwelling units were built in the Kildonan Crossing neighbourhood, with 419 total dwelling units. The sum of this development occurred on only two properties – 839 and 865 Panet Rd, most of which occurred in 2019. Kildonan Crossing was followed by River-Osborne with 410 units, and West Broadway with 320.

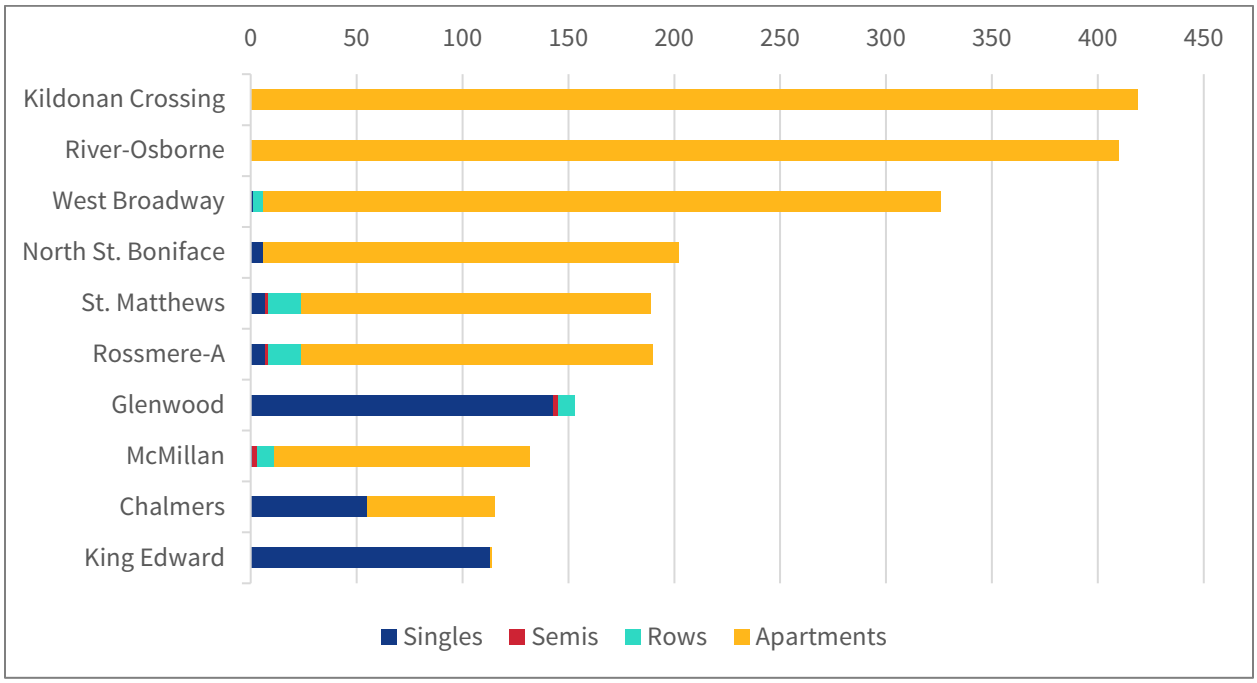

Figure 5-21: Top ten Mature Communities neighbourhoods by new dwelling units, 2018-22

Between 2018 and 2021, the highest rates of new infill single-detached development in Mature Communities occurred in the Glenwood neighbourhood, followed by King Edward, Brooklands, Chalmers, and Sir John Franklin.

Neighbourhood	New dwelling units
Glenwood	143
King Edward	113
Brooklands	74
Chalmers	55
Sir John Franklin	47
Burrows Central	40
North River Heights	39
Jefferson	37
Maybank	37
William Whyte	36
Lord Roberts	34
Weston	31
Beaumont	28
Varennes	27
Wellington Crescent	27

Figure 5-22: Top ten Mature Communities neighbourhoods by new single-detached units, 2018-22

In Recent Communities, Eaglemere accommodated the largest number of new dwelling units with 483, most of which were located on the east side of Molson St, north of Grassie Blvd. Eaglemere was followed by Tuxedo Industrial with 218, and River Park South with 198.

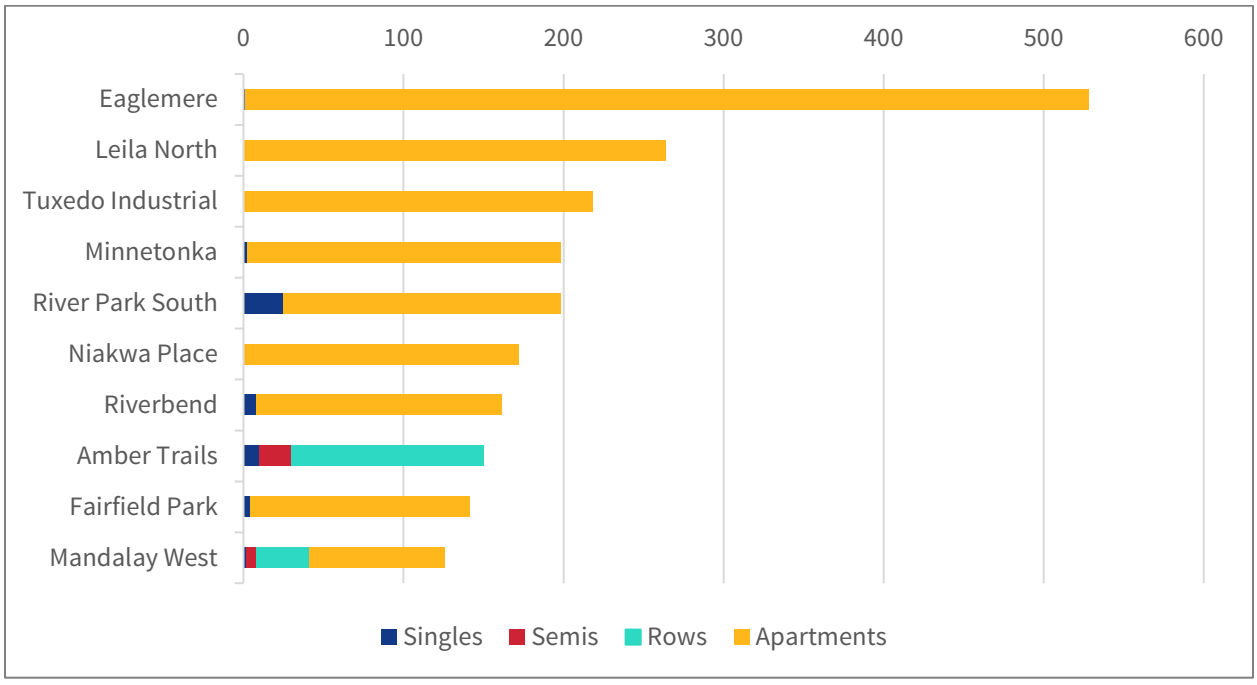

Figure 5-23: Top ten Recent Communities neighbourhoods by new dwelling units, 2018-22

5.6 Development Activity by Greenfield Area

The chart below illustrates the magnitude of development activity of major greenfield sites, illustrating the course of their build-outs. A map of existing greenfield sites can be found in Section 6.5 of this report.

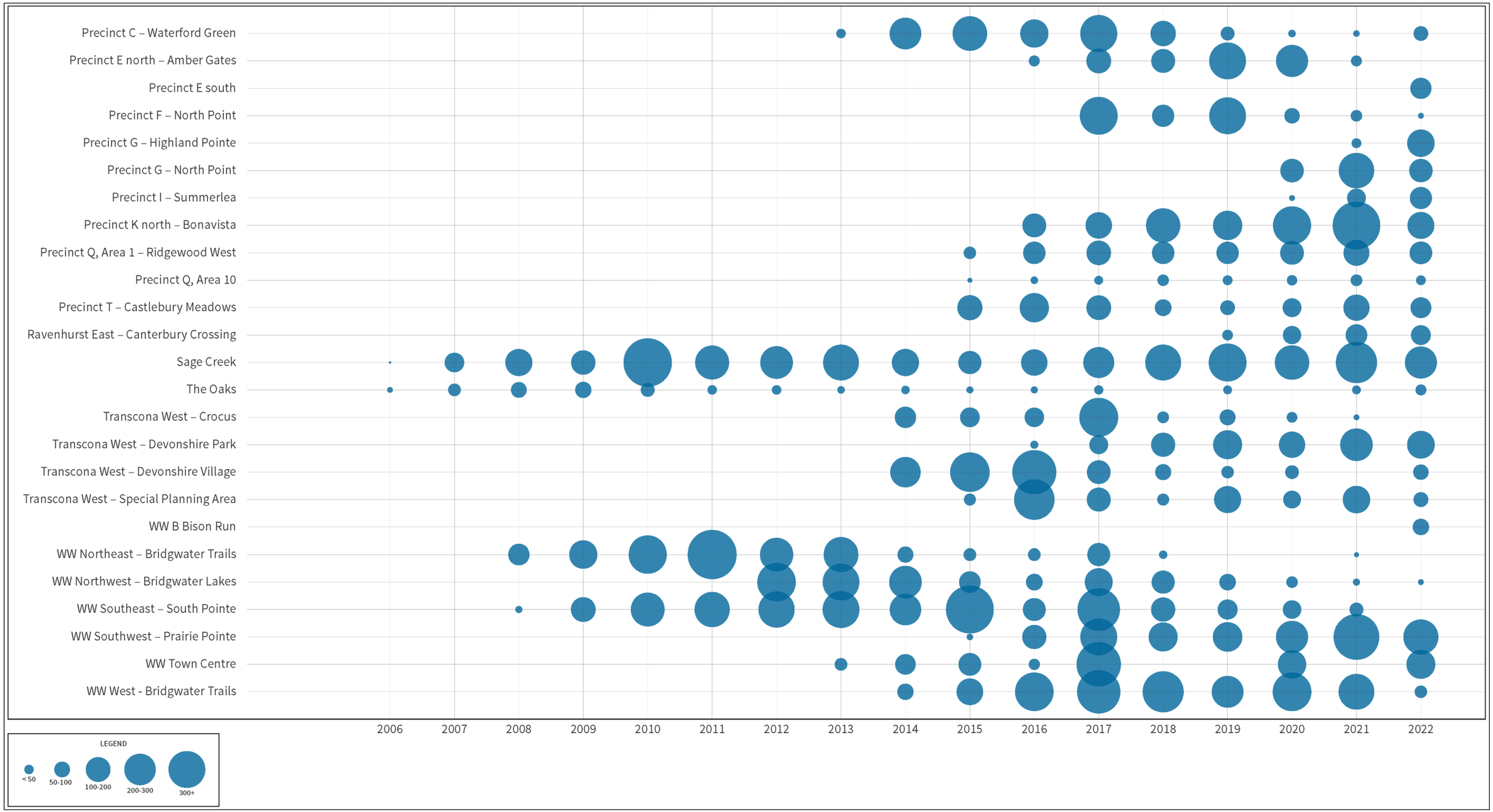

Figure 5-24: Magnitude of permits issued for new dwelling units by year, major greenfield sites

The chart below illustrates permits issued for the construction of new residential dwelling units, by dwelling type, in 2022. Section 6.5 provides additional detail on total and remaining capacity by site.

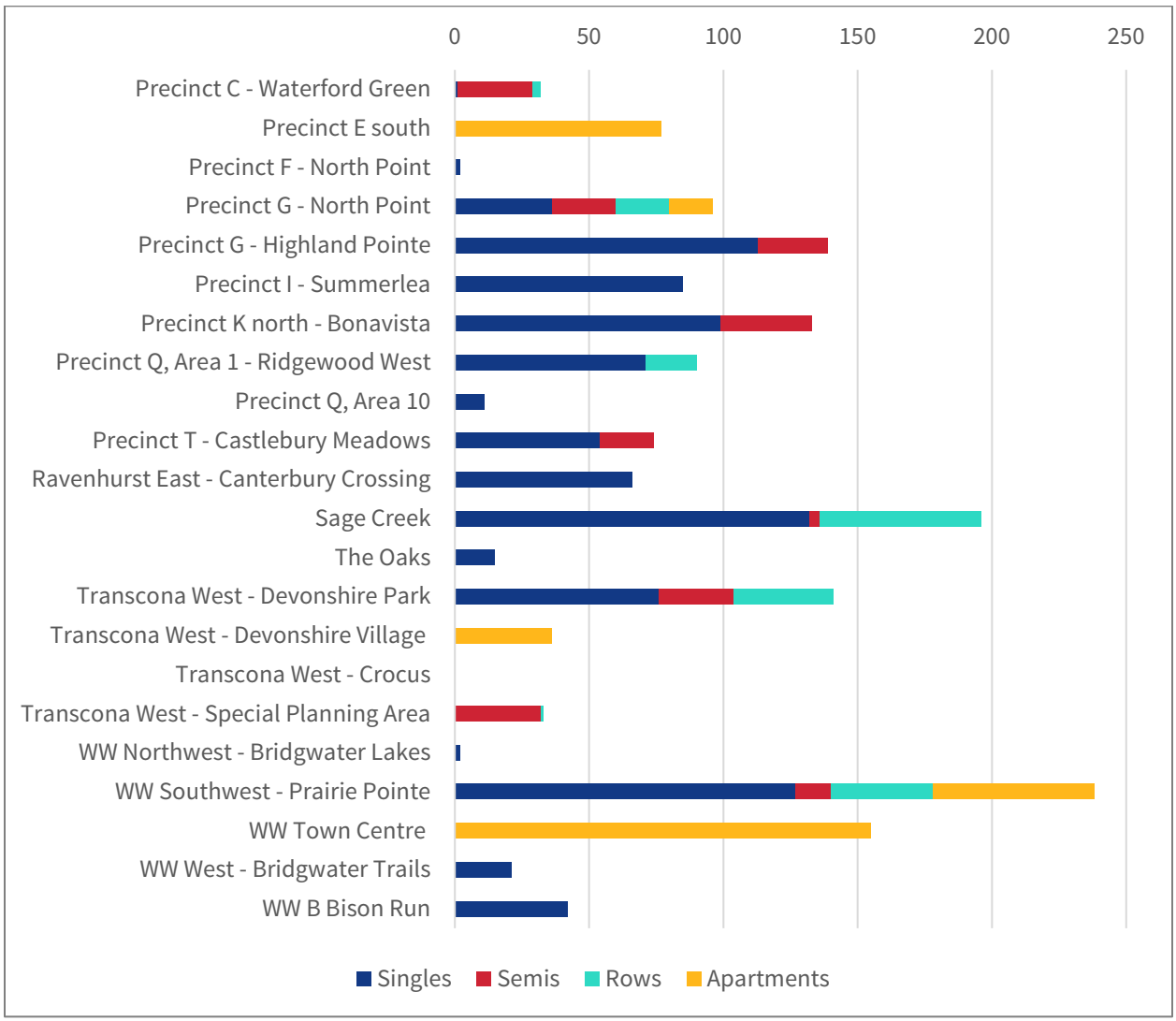

Figure 5-25: Greenfield dwelling units, 2022, by site and dwelling unit type

5.7 Secondary Suites

Dwelling units cited and summarized in this report only include primary dwellings and do not include accessory units such as secondary suites. However, given their increasing prevalence, they nonetheless warrant standalone attention.

Over the last decade, Council has made changes to its zoning by-law to facilitate the construction of secondary suites. On February 27, 2013, it expanded the definition of secondary suites to allow for detached units in addition to attached suites through

Conditional Use applications. Then, on January 25, 2017, it allowed for attached secondary suites as a permitted use. Consequently, these changes generated significant development activity, increasing from seven per year to as high as 187 per year in 2022, increasing year-over-year almost every year.

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

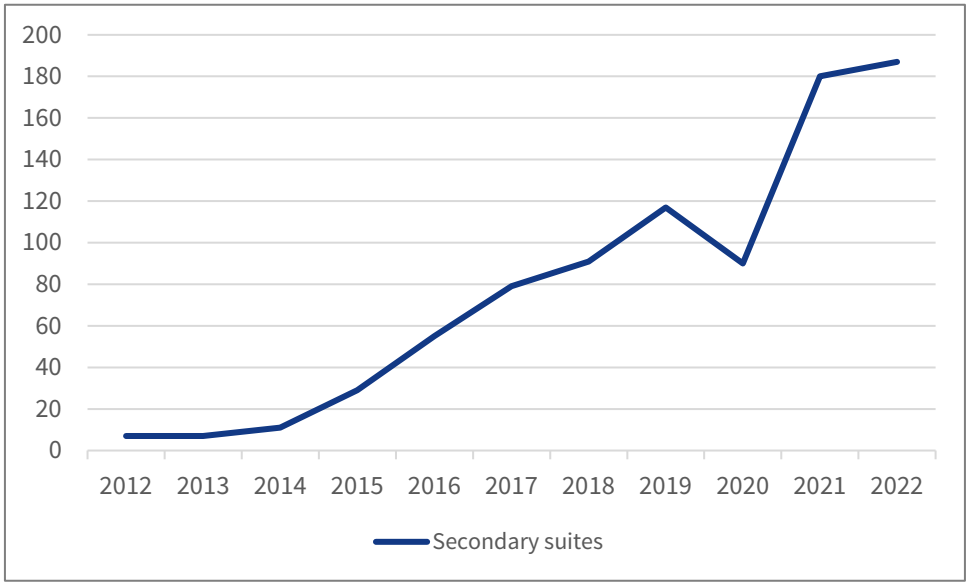

Figure 5-26: Permits issued for the construction of secondary suites, 2012 to 2022

New secondary suites are predominantly being built in existing neighbourhoods, particularly in Mature Communities. Figure 5-27 below shows their distribution by Complete Communities 2.0 Urban Structure; from 2012 to 2022, 96% were built in Established Neighbourhoods, and 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 2022	
	No.	%
Corridor frontage	1	< 1
Urban Corridors	0	0
Regional Corridors	1	< 1
Established Neighbourhoods	795	96
Mature Communities	714	86
Recent Communities	81	10
Greenfield areas	22	3
Emerging Communities	22	3
New Communities	0	0
Downtown	0	0
Major Redevelopment Sites	6	1
Rural Agricultural	4	<1
Total	828	

Figure 5-27: Permits issued for the construction of secondary suites, 2012 to 2022, by Complete Communities 2.0 Urban Structure

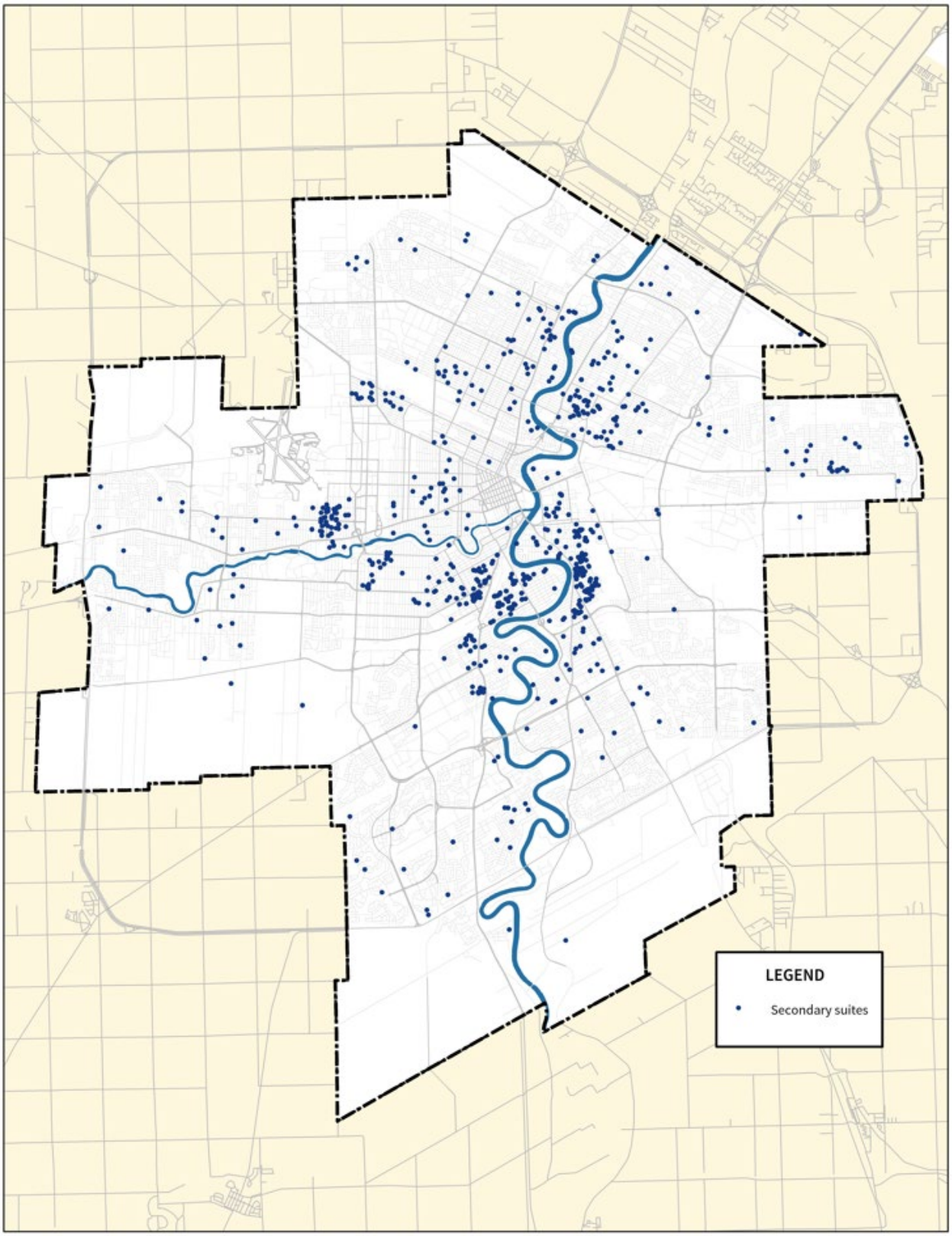

Figure 5-28: Permits issued for the construction of new secondary suites, 2012 to 2022

5.8 Residential Demolitions

It is important to emphasize that the residential development activity described in this section are gross totals and do not account for the removal of existing units in developing new ones. As a result, it is important to understand residential demolitions.

In order to analyze residential demolitions, a geographic framework was established based on the Area 1 and Area 2 neighbourhoods used in the City's *Small-Scale and Low-Rise Residential Development Guidelines for Mature Communities*. Over the last five years, the City saw an annual average of 114 dwelling units lost in Infill Area 1, 144 units lost in Infill Area 2, and 28 units lost in Recent Communities. These Infill Area figures increased around 2018 in concert with higher rates of multifamily development and intensification.

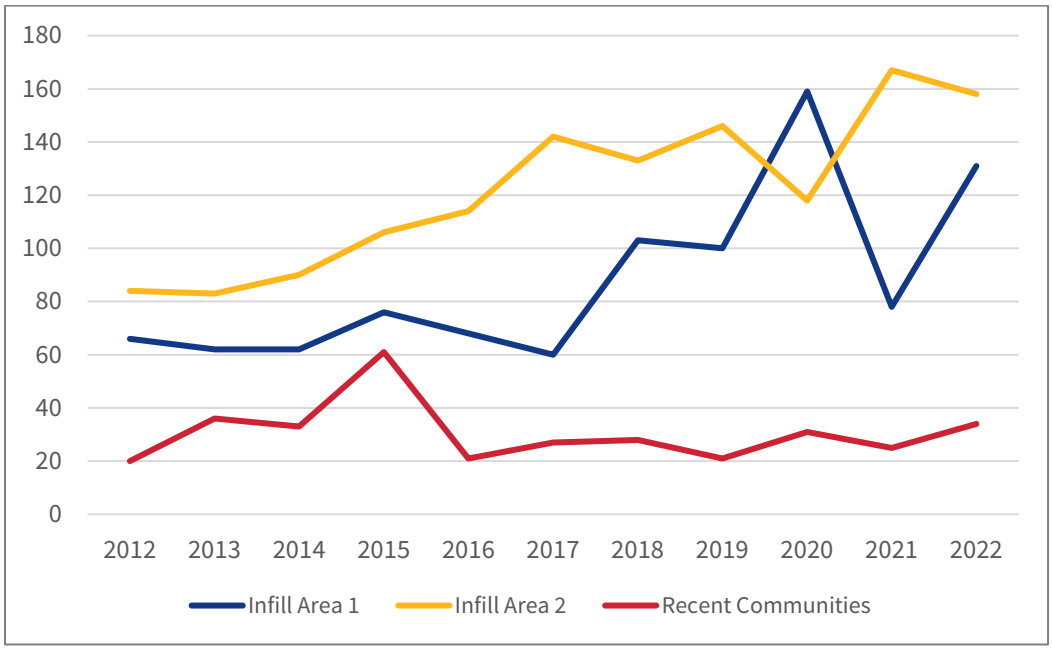

Figure 5-29: Average annual dwelling units lost, by area

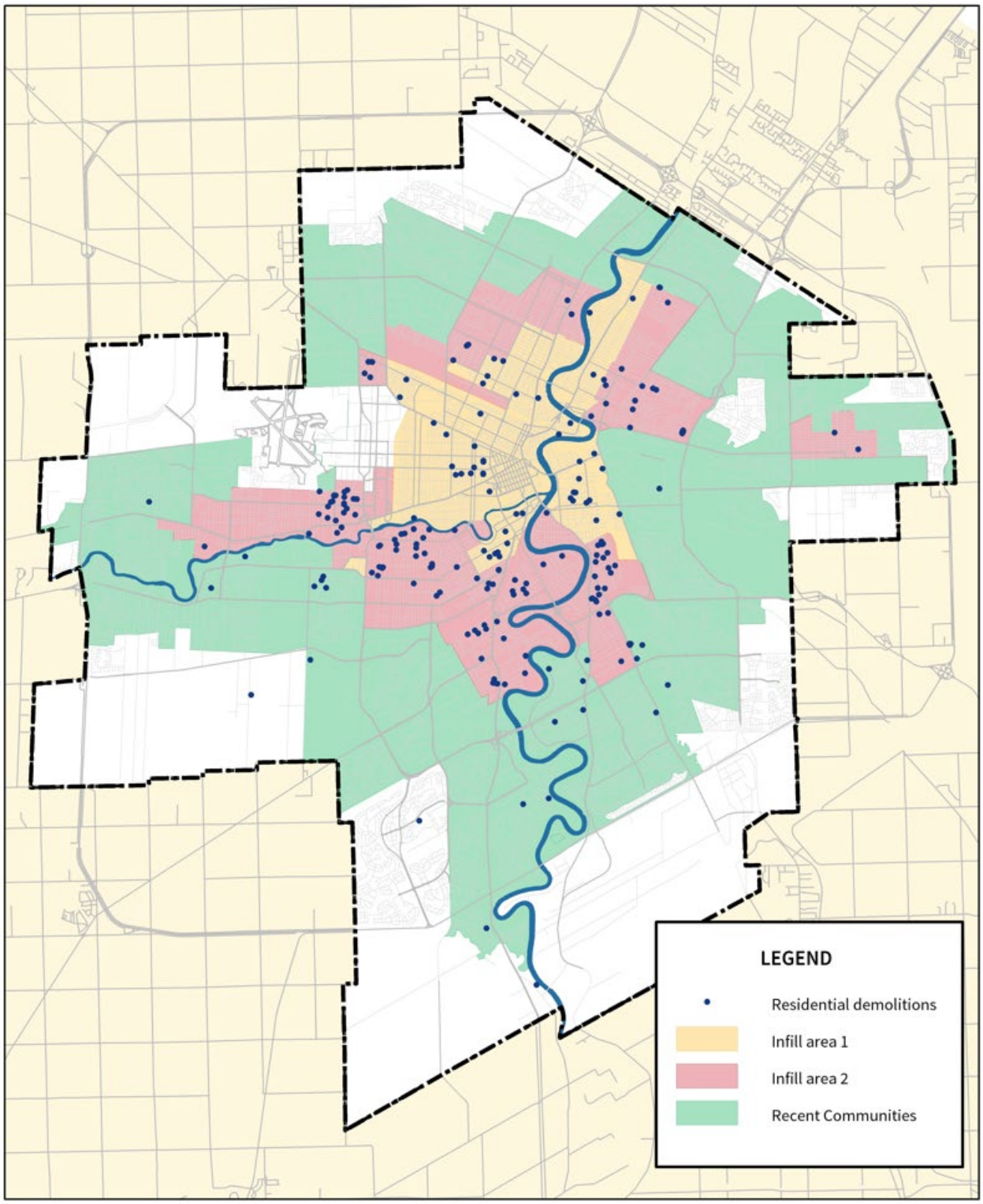

Figure 5-30: Map of residential demolitions, 2012 to 2021

Within each of these categories, the number of new dwelling units created was compared to the number of units lost to understand the relationship between the two. As Figure 5-31 below

describes, over the last five years Infill Area 1 sees an average of eight new units created for every unit lost, Infill Area 2 sees an average of four new units created for every unit lost, and Recent Communities sees 52 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
5-yr avg.		**114**	**8.0**		**144**	**4.0**		**28**	**52.1**

Figure 5-31: Dwelling units created vs dwelling units lost, 2012 to 2022

6.0 Greenfield Residential Land Supply

6.1 Selecting a Demand Scenario

In Q1 2023, the City of Winnipeg's Office of Economic Research released the *25-Year Population, Housing, and Employment Projections for the City of Winnipeg and Census Metropolitan Area*. These projections were based on three population growth scenarios ranging from low, to baseline, to high, which were based on varying population growth components described below. The Low projection expects the City to reach a population of 883,300 people by 2047, the Baseline projection 1,013,100 people, and the High projection 1,069,800 people.

Scenario	Assumptions
Low	• Net international migration close to the historical median • Sustained high out-migration to other provinces • Statistics Canada low fertility rate scenario • Above-average growth outside the city
Baseline	• International migration continues at recently observed averages • Near-term interprovincial out-migration averages; • Stats Canada medium fertility rate scenario • Average growth outside the city
High	• Net international migration is elevated over the long term based on recent highs • Interprovincial out-migration returns to a long-term median • Stats Canada high fertility rate scenario • Below-average growth outside the city

Figure 6-1: 2023 population forecast assumptions

These population projection scenarios were used to forecast housing starts based on demographic changes, historical housing starts by type, and current interest rates. As Figure 6-2 indicates below, all three scenarios expect lower levels of housing starts compared to a fourth scenario based on average rates of development activity over the last five years.

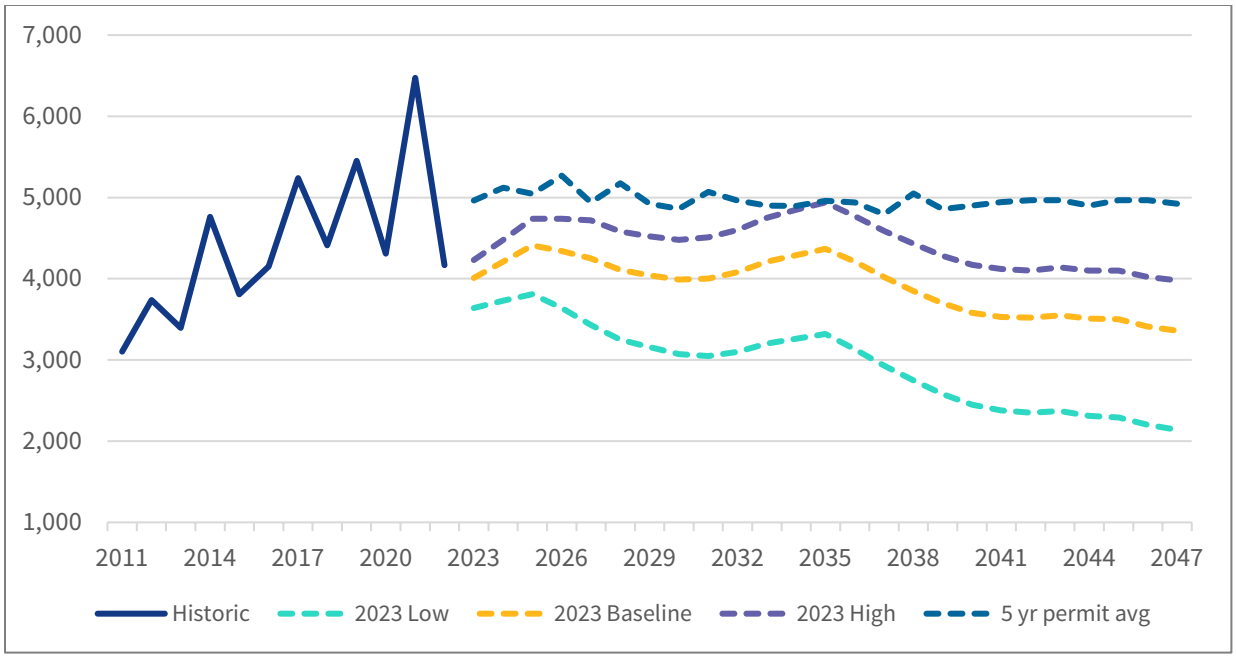

Figure 6-2: Forecasted housing starts compared to a scenario based on development activity over the last five years

This forecasted decrease in demand would effectively result in gains to the City's greenfield land supply, as its existing supply would be absorbed over a long period of time. This is particularly applicable to singles, which are significant drivers of greenfield development; annual singles are expected to decrease from 2023 to 2047.

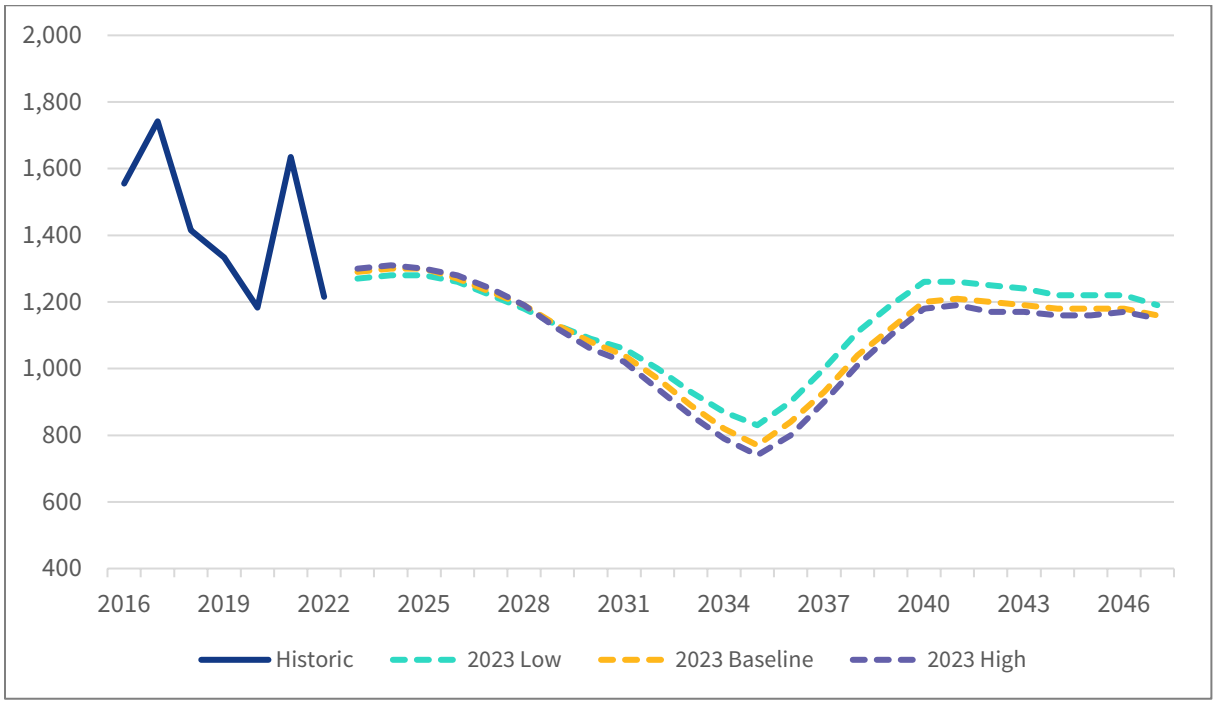

Figure 6-3: Forecasted singles, 2023 to 2047

The extent to which these 2023 forecasts deviate from recent development trends, combined with current market uncertainty related to increasing interest rates, warrants hesitation in their full-fledged adoption. A wider range of scenarios should be considered that contemplate the implications of higher rates of development. As a result, three categories of forecasts were developed. In addition to the 2023 City forecasts described above, scenarios were also developed based on the continuation of existing five-year development trends (accounting for projected changes in household size and share of regional growth captured by the City), as well as mid-range scenarios splitting the difference between the two. Scenarios within these categories also considered the implications of lower intensification rates.

Scenarios	Annual avg. GF demand (units)	Years supply		
		Serviced	Inf. Installed & B/L approved	Planned
CCDS 2.0 supply targets	**n/a**	**5-7**	**3-5**	**10**
2023 CoW forecasts				
2023 Low	1,405	15	9.5	20
2023 Baseline	1,680	12.5	8	17
2023 High	1,825	11.5	7.5	15.5
2018-22 permit scenarios				
Five-year permit	2,100	10	6.5	13.5
5-yr at 50% infill	2,490	8.5	5.5	11.5
5-yr at 40% infill	3,005	7	4.5	9.5
Mid-range scenarios				
2023 Low (mid-range)	1,755	12	8	16
2023 Baseline (mid-range)	1,890	11	7	15
2023 High (mid-range)	1,965	11	7	14.5
2023 High (MR) at 50% infill	2,340	9	6	12
2023 High (MR) at 40% infill	2,815	7.5	5	10

Figure 6-3: Range of contemplated greenfield demand scenarios

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

2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2018 22 avg
1,893	2,121	1,891	1,735	2,018	2,207	3,501	1,879	2,012	2,019	2,565	1,989	2,093

Figure 6-4: Greenfield dwelling units, 2011-2022

There is a need to focus on a select few scenarios for reporting purposes. 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 2023 forecasts are based on demographic and macroeconomic analysis, while permit scenarios simply project existing short-term trends;
- Increasing interest rates create uncertain market conditions;
- Overestimating greenfield land supply results in infrastructure investments being made earlier than necessary, while underestimating land supply reduces the margin for error with respect to timely infrastructure delivery;
- The City's forecasts are intended to be reviewed annually; and
- The "5-yr at 50% infill" forecast is most comparable to what was used in the *2022 Complete Communities Land Monitoring Report*, but the intensification rate has exceeded 50% in each of the last five years.

At this time, it is recommended that the "Five-year permit" scenario is used as the Primary demand scenario for planning purposes. Compared to the 2023 City forecasts, it is felt that it is better to (reasonably) err on the side of overestimating demand, as doing so provides a greater buffer for infrastructure planning purposes and the accommodation of growth. However, with the intensification rate having exceeded the 50% target in each of the last five years, it is felt that the preferred scenario should reflect recent intensification rates.

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

These assumptions should be revisited following the preparation of the next City of Winnipeg housing forecast.

6.2 Supply by Targets

The General Growth section of *Complete Communities 2.0* (CCDS) prescribes a number of greenfield land supply targets. These targets are intended to inform the timing of precinct planning[1] and City-funded growth-enabling infrastructure. These targets, along with the City's existing supplies, are noted in Figure 6-5 below and are accurate as of January 1, 2023.

[1] Precinct plans are secondary plans that apply to areas designated as New Communities in Complete Communities 2.0. Their key role is to ensure that future development is comprehensive, orderly, and complete. They are a prerequisite to development.

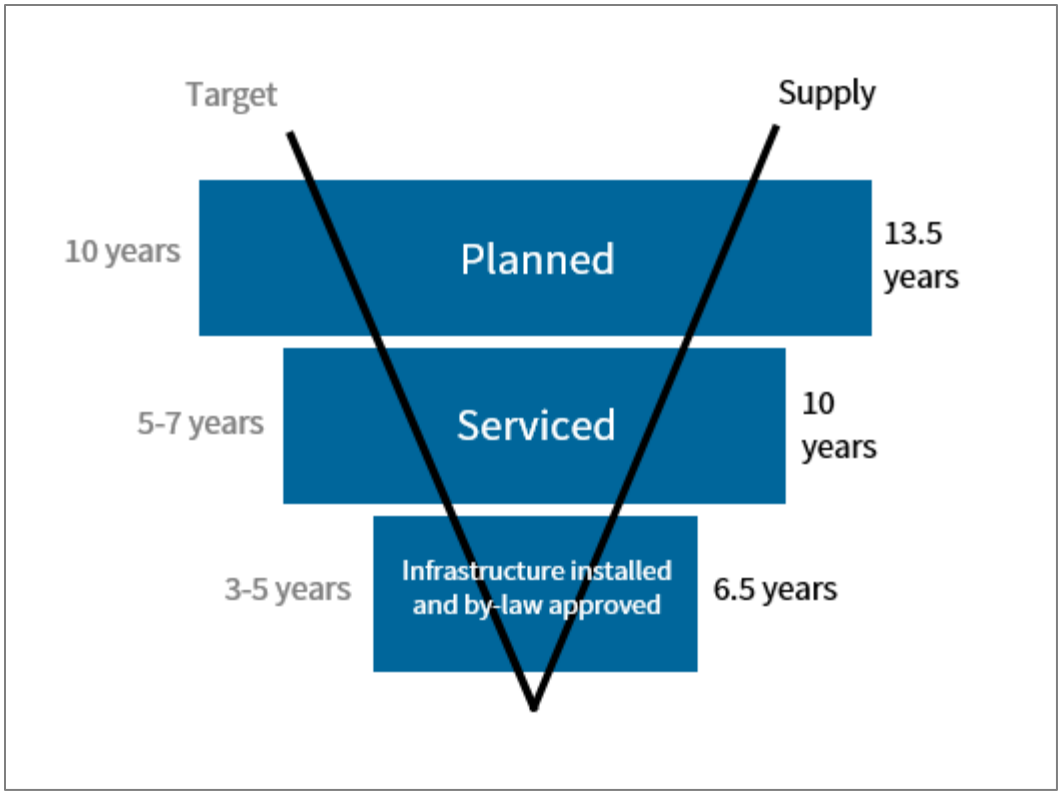

Figure 6-5: City of Winnipeg vacant residential greenfield land supplies in relation to Complete Communities 2.0 targets, as of January 1, 2023

All told, the City of Winnipeg currently has a healthy supply of vacant greenfield land, with its supplies[1] exceeding all Complete Communities' targets. These land supplies and targets should serve as the basis for the timing of future precinct planning processes and growth-enabling infrastructure, which will be needed over time to maintain this healthy supply.

Years supply is determined by dividing total land supply by forecasted annual greenfield land demand. As described in Section 6.1, the estimated supplies assume the continuation of existing development trends over the last five years, including the intensification rate. However, it is important to consider different demand and supply scenarios to promote resiliency in the face of changing conditions.

[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.

Section	Target	Supplies at varying levels of greenfield demand, Standard supply scenario		
		High demand	Primary demand	Low demand
4.2	Maintain approximately a 10-year supply of planned greenfield land to support a well-functioning, competitive land market throughout the City and to manage competing demands for City local area planning resources and growth-supportive infrastructure ("Planned")	11.5 years	13.5 years	15.5 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land ("Serviced")	8.5 years	10 years	11.5 years
4.1.1	Maintain a three- to five-year supply of vacant serviced greenfield land where all growth-enabling infrastructure is installed and the subdivision by-law is approved.	5.5 years	6.5 years	7.5 years

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

Section	Target	Supplies at varying levels of greenfield demand, Alternative Higher supply scenario[1]		
		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")	13.5 years	15.5 years	18 years
4.1	Maintain a five-to-seven year supply of vacant serviced greenfield land ("Serviced")	10 years	12 years	13.5 years
4.1.1	Maintain a three- to five-year supply of vacant serviced greenfield land where all growth-enabling infrastructure is installed and the subdivision by-law is approved.	6.5 years	7.5 years	9 years

Figure 6-7: Land supply estimates and shares of infill development, Alternative Higher supply scenario

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

[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.

manage competing demands for limited City-funded growth-enabling and -supportive infrastructure, planning resources, and City operating costs.

Compared to last year, there is little change in the City's supply of vacant serviced greenfield land. Losses through a year of absorption were offset by gains and re-categorization of supply.

- Approximately 870 units of Phase 1A in Airport Area West Residential was re-categorized from unserviced to serviced with announced government funding for water and wastewater servicing.
- The total number of units in Waverley West Southwest (Prairie Pointe) increased by approximately 300 units due to forecast refinement with the landowner.
- With Council having approved funding for the Southwest Interceptor in its 2022 budget, all of Waverley West B can now be considered serviced.
- The total number of units in Waverley West B also increased by approximately 300 units as new subdivisions were approved at higher-than-forecasted densities.
- The total number of units in Precinct E South increased by approximately 100 units as new development was approved at higher-than-forecasted densities.
- There was a small increase in the average greenfield densities used to forecast unplanned sites (from 14.1 to 14.5 units per net acre).
- There was a decrease in "unplanned" units due to more refined mapping of undevelopable lands in the St Vital Perimeter South and Wilkes South sectors.

6.3 Supply by Greenfield Phasing

The General Growth section of CCDS 2.0 prescribes policies to guide the sequencing of timely capital infrastructure and local area plans[1] to enable and support the full build-out of future greenfield lands in accordance with the following prioritization:

1. Existing serviced
2. Short-to-medium term lands
    a. Tier 1 lands
    b. Tier 2 lands
    c. Tier 3 lands
    d. Tier 4 lands
3. Long-term lands
    a. Tier 1 lands
    b. Tier 2 lands

[1] "Local area plans" refer to a wide range of planning tools, including but not limited to secondary plans, background studies, and design guidelines. They address issues and concerns of a portion of the city, ranging in scale from dozens to thousands of acres. In this case, this refers to the need to undertake a precinct plan (or sector plan, where applicable) as a prerequisite to development in New Communities.

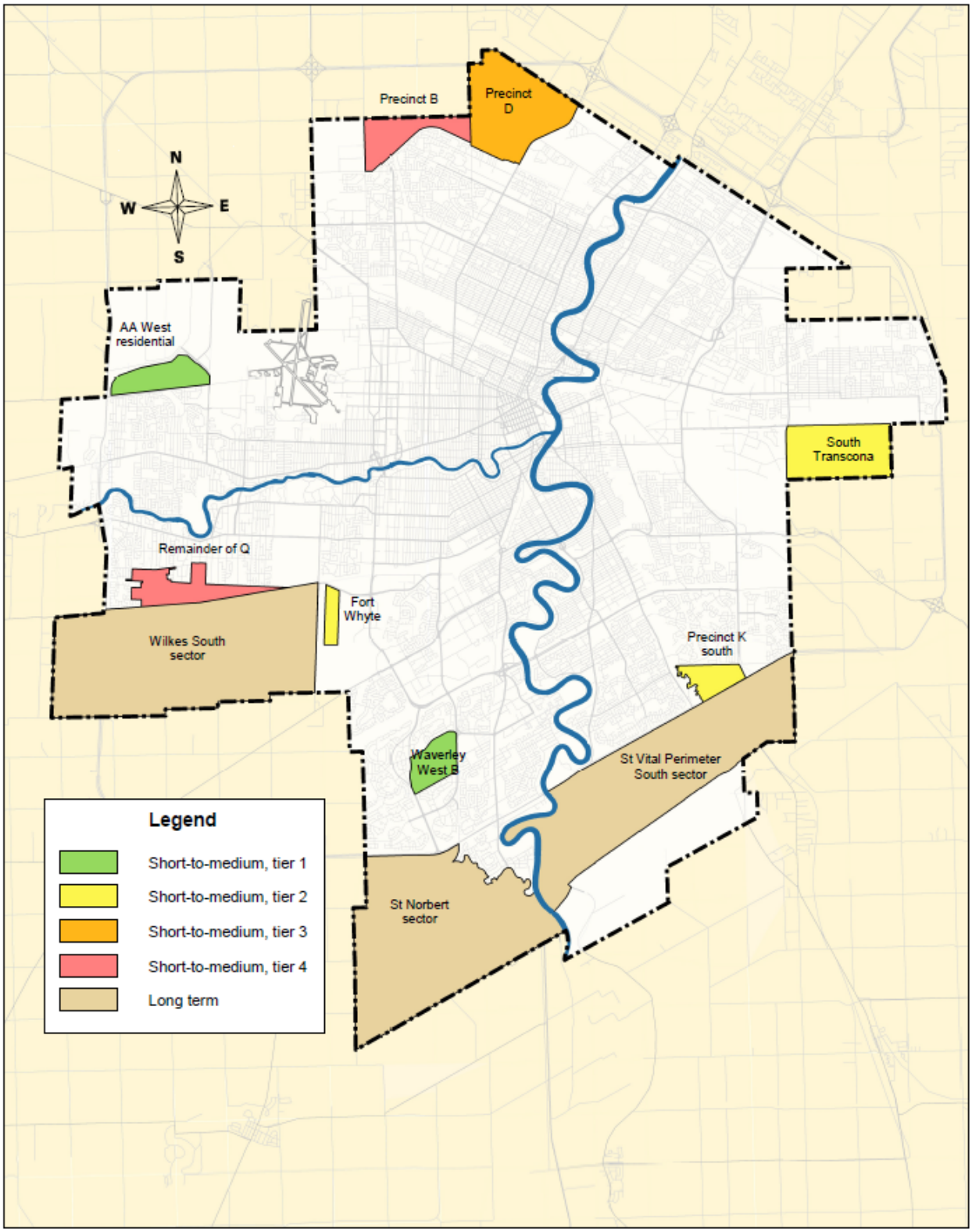

Figure 6-8: Map of greenfield phasing, Complete Communities 2.0

Figures 6-5 and 6-6 below quantify the City's greenfield land supplies with CCDS 2.0's phasing policies under both the Standard and Alternative Higher supply scenarios, while 6-7 notes the estimated year in which each phasing tier would be needed to accommodate growth (preferred scenarios highlighted in orange). It should be stressed that these years do not provide for a minimum land supply buffer in accordance with Policy B1.4.4.1 of CCDS 2.0; delivery of growth-enabling infrastructure should be planned for a minimum of three years in advance of these dates.

Tiers	Years supply		
	High demand	Primary demand	Low demand
Existing planned and serviced	8.5 years	10 years	11.5 years
Short-to-medium term lands	11 years	13 years	15 years
Long term lands	26.5 years	31.5 years	36 years
Total potential land supply	46 years	54.5 years	63 years

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

Tiers	Years supply		
	High demand	Primary demand	Low demand
Existing planned and serviced	10 years	12 years	13.5 years
Short-to-medium term lands	13 years	15 years	17.5 years
Long term lands	30.5 years	36 years	41.5 years
Total potential land supply	53.5 years	63 years	73 years

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

Tiers	High demand		Primary demand		Low demand	
	Forecast	Alt. higher	Forecast	Alt. higher	Forecast	Alt. higher
Short-to-medium, tier 1	2032	2033	2033	2035	2035	2037
Short-to-medium, tier 2	2033	2034	2035	2037	2036	2039
Short-to-medium, tier 3	2036	2038	2038	2041	2041	2043
Short-to-medium, tier 4	2040	2043	2043	2047	2046	2050
Long term	2043	2046	2046	2050	2050	2054
Delivery of growth-enabling infrastructure should be planned for a minimum of three years in advance of these dates in accordance with Policy B1.4.4.1 of CCDS 2.0						

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

6.4 Supply by Dwelling Types

The table below details the estimated supply of potential remaining greenfield dwelling units[1], by dwelling type. These numbers are the sum total of the supply figures by site described in section 6.4 below.

Category	Supply scenario	Singles	Semis	Rows	Total G.O.[2]	Apts	Total
Planned and serviced	Standard	7,200	2,300	3,220	12,720	8,420	21,100
	Alt. Higher	6,160	3,660	4,230	14,050	10,900	24,940
Planned, but unserviced	Standard	3,610	810	1,200	5,620	1,640	7,260
	Alt. Higher	3,140	1,390	1,670	6,200	2,010	8,210
Unplanned	Standard	38,200	8,030	10,660	56,890	29,630	86,510
	Alt. Higher	32,470	15,070	15,770	63,310	36,440	99,750

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

6.5 Supply by Site

The following charts describe the City's residential greenfield supply by site, noting individual sites that comprise the City's inventory. These sites are identified in Figure 6-8 below. These lists exclude sites that can be considered to be built-out. Recently completed greenfield sites include Amber Trails, Waverley West Northeast (Bridgwater Forest), and Waterside Estates.

[1] Figures rounded.

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

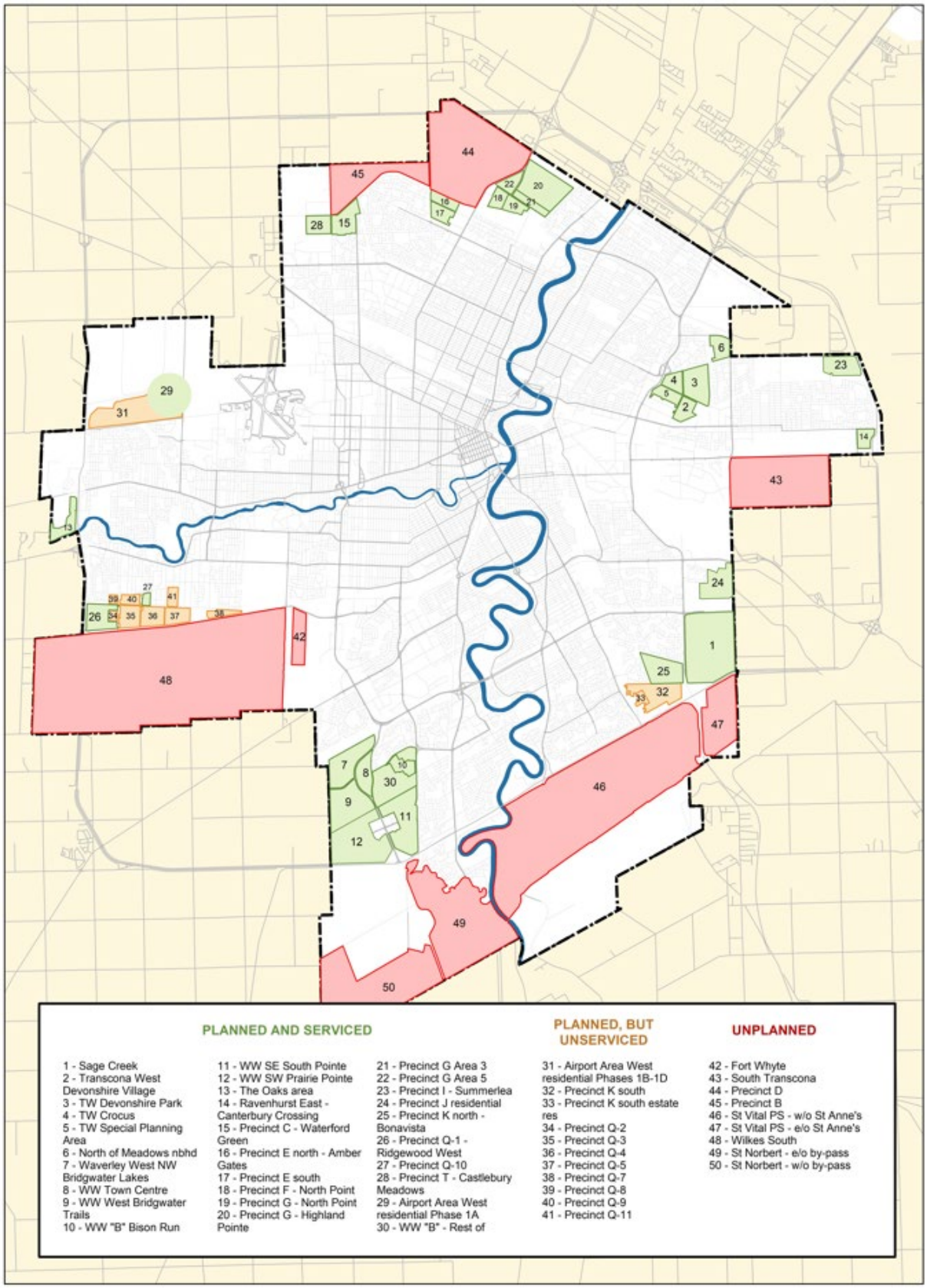

Figure 6-13: Greenfield supply, by site

The first chart notes those that are considered to be planned and serviced and includes units[1] built to-date. Sites that are planned but unserviced as well as sites that are unplanned are excluded from this first table because development has yet to occur.

Greenfield sites	Units built to date				
	Singles	Semis	Rows	Apts	Total
Sage Creek	2,090	20	260	910	3,290
Transcona West – Devonshire Village	320	60	200	510	1,100
Transcona West – Devonshire Park	620	80	90	0	790
Transcona West – Crocus	250	90	0	230	580
Transcona West – Special Planning Area	110	150	80	490	820
North of Meadows neighbourhood	0	0	0	0	0
WW Northwest – Bridgwater Lakes	1,190	0	0	0	1,190
WW Town Centre	0	130	250	520	900
WW West – Bridgwater Trails	1,020	260	60	590	1,940
WW B – Bison Run	40	0	0	0	40
WW B – Rest of	0	0	0	0	0
WW Southeast – South Pointe	1,390	0	600	480	2,460
WW Southwest – Prairie Pointe	920	180	120	330	1,550
The Oaks area	210	0	0	0	210
Ravenhurst East – Canterbury Crossing	190	20	0	0	220
Precinct C – Waterford Green	610	150	90	190	1,030
Precinct E north – Amber Gates	310	40	0	360	700
Precinct E south	0	0	0	80	80
Precinct F – North Point	170	110	60	350	690
Precinct G – North Point	140	70	50	170	440
Precinct G – Highland Pointe	120	30	0	0	150
Precinct G – Area 3	0	0	0	0	0
Precinct G – Area 5 (triangle)	0	0	0	0	0
Precinct I – Summerlea	150	0	0	0	150
Precinct J residential	0	0	0	0	0
Precinct K north – Bonavista	880	60	70	480	1,500
Precinct Q, Area 1 – Ridgewood West	660	0	40	0	700
Precinct Q, Area 10	80	0	0	0	80
Precinct T – Castlebury Meadows	300	310	90	40	730
Planned and serviced total	11,470	1,440	1,990	5,700	20,600

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

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

The next two charts describe estimated potential total units using the Standard and Alternative higher supply scenarios.

Greenfield sites	Estimated potential total units					% completion			Potential remaining units					
	Singles	Semis	Rows	Apts	Total	G.O.	Apts	Total	Singles	Semis	Rows	G.O.	Apts	Total
PLANNED AND SERVICED														
Sage Creek	2,720	80	910	1,250	4,960	64	73	66	630	60	650	1,330	340	1,670
TW – Devonshire Vlg	240	70	260	480	1,040	100	100	100	0	10	50	60	0	50
TW – Devonshire Prk	1,070	90	290	130	1,570	55	0	50	450	0	200	650	130	780
TW – Crocus	260	140	0	230	630	87	100	92	10	50	0	50	0	50
TW – SPA	130	160	90	880	1,260	87	56	65	30	20	10	50	390	440
North of Meadows nbhd	320	70	90	250	720	0	0	0	320	70	90	470	250	720
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	830	1,210	100	63	75	0	10	0	10	310	310
WW W – Bridgwater Trls	1,040	270	0	1,180	2,490	100	50	78	20	10	0	30	590	620
WW B – Bison Run	310	30	240	880	1,460	7	0	3	270	30	240	540	880	1,420
WW B – Rest of	690	140	250	700	1,530	0	0	0	690	140	250	1,080	700	1,780
WW SE – South Pt	1,410	0	570	410	2,390	100	100	100	20	0	0	20	0	20
WW SW – Prairie Pointe	2,270	930	380	630	4,210	34	53	37	1,350	760	250	2,360	300	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	0	110	470	60	0	46	100	50	0	150	110	250
AA West– Ph 1A	390	80	110	300	870	0	0	0	390	80	110	570	300	870
Pr. C – Waterford Grn.	580	200	150	190	1,110	91	100	93	0	50	60	110	0	110
Pr. E north – Amber Gates	310	40	0	510	860	100	70	82	0	0	0	0	160	160
Pr. E south	30	0	190	820	1,030	0	9	7	30	0	190	220	740	960
Pr. F – North Pt	160	120	50	430	750	100	82	92	0	0	0	0	80	80
Pr. G – North Pt	290	100	80	270	740	56	64	59	150	30	30	210	100	300
Pr. G – Highland Pt	1,200	360	350	850	2,760	8	0	5	1,070	340	350	1,760	850	2,610
Pr. G – Area 3	240	50	70	190	550	0	0	0	240	50	70	360	190	550
Pr. G – Area 5	120	30	30	100	280	0	0	0	120	30	30	180	100	280
Pr. I – Summerlea	700	160	240	0	1,100	13	n/a	13	550	160	240	950	0	950
Pr. J res	440	120	280	1,580	2,430	0	0	0	440	120	280	840	1,580	2,430
Pr. K north – Bonavista	1,030	130	140	650	1,950	78	73	77	150	60	70	280	170	390
Pr. Q-1 – Ridgewood West	820	40	60	0	910	77	n/a	77	150	40	20	210	0	210
Pr. Q-10 – Sctswd Meadow	90	0	0	0	90	98	n/a	98	0	0	0	0	0	0
Pr. T – Cstlbry Meadow	310	390	120	220	1,050	84	16	70	20	80	40	130	190	320

Greenfield sites	Estimated potential total units					% completion			Potential remaining units					
	Singles	Semis	Rows	Apts	Total	G.O.	Apts	Total	Singles	Semis	Rows	G.O.	Apts	Total
Planned and serviced total	**18,830**	**4,100**	**5,180**	**14,060**	**41,910**	**n/a**			**7,200**	**2,340**	**3,220**	**12,750**	**8,420**	**21,100**
PLANNED, BUT UNSERVICED														
AA West res – Ph 1B	480	100	130	370	1,090				480	100	130	720	370	1,090
AA West res – Ph 1C	440	90	120	340	990				440	90	120	650	340	990
AA West res – Ph 1D	470	100	130	360	1,060				470	100	130	700	360	1,060
Pr. K south	720	150	200	560	1,640				720	150	200	1,080	560	1,640
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	290	120	190	0	600				290	120	190	600	0	600
Pr. Q-4	290	120	200	0	610		n/a		290	120	200	610	0	610
Pr. Q-5	260	110	170	0	540				260	110	170	540	0	540
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	**3,610**	**810**	**1,200**	**1,640**	**7,260**				**3,610**	**810**	**1,200**	**5,620**	**1,640**	**7,260**
UNPLANNED														
Fort Whyte	610	130	170	470	1,370				610	130	170	900	470	1,370
South Transcona	2,030	430	570	1,570	4,590				2,030	430	570	3,020	1,570	4,590
Precinct D	4,760	1,000	1,330	3,690	10,780				4,760	1,000	1,330	7,090	3,690	10,780
Precinct B	1,660	350	460	1,290	3,770				1,660	350	460	2,480	1,290	3,770
St. Vital PS – w/o St Anne's	4,640	980	1,300	3,600	10,510				4,640	980	1,300	6,910	3,600	10,510
St. Vital PS – e/o St Anne's	1,520	320	420	1,180	3,430		n/a		1,520	320	420	2,260	1,180	3,430
Wilkes South	13,890	2,920	3,880	10,780	31,470				13,890	2,920	3,880	20,690	10,780	31,470
St. Norbert – e/o by-pass	3,300	690	920	2,560	7,480				3,300	690	920	4,920	2,560	7,480
St. Norbert – w/o by-pass	5,800	1,220	1,620	4,500	13,130				5,800	1,220	1,620	8,630	4,500	13,130
Unplanned total	**38,200**	**8,030**	**10,660**	**29,630**	**86,510**				**38,200**	**8,030**	**10,660**	**56,890**	**29,630**	**86,510**

Figure 6-15: Estimated potential total and remaining units by site, Standard supply scenario

Greenfield sites	Estimated potential total units					% completion			Potential remaining units					
	Singles	Semis	Rows	Apts	Total	G.O.	Apts	Total	Singles	Semis	Rows	G.O.	Apts	Total
PLANNED AND SERVICED														
Sage Creek	2,630	190	990	1,350	5,160	62	68	64	520	170	730	1,440	440	1,870
TW – Devonshire Vlg	210	70	330	480	1,090	96	100	99	0	10	130	140	0	140
TW – Devonshire Prk	1,000	170	350	160	1,680	52	0	47	380	90	260	730	160	890
TW – Crocus	250	140	0	230	630	88	100	92	0	50	0	50	0	50
TW – SPA	130	170	90	1,040	1,430	86	47	58	20	20	10	60	550	610
North of Meadows nbhd	270	130	130	300	830	0	0	0	270	130	130	520	300	830
WW NW – Bridgwater Lakes	1,230	0	0	0	1,230	97	n/a	97	40	0	0	40	0	40
WW Town Centre	0	130	250	980	1,360	100	53	66	0	10	0	10	460	460
WW W – Bridgwater Trls	1,040	270	0	1,350	2,660	100	44	73	20	10	0	30	760	790
WW B – Bison Run	270	80	280	1,060	1,680	7	0	3	230	80	280	580	1,060	1,640
WW B – Rest of	600	270	340	1,050	2,250	0	0	0	600	270	340	1,210	1,050	2,250
WW SE – South Pt	1,410	0	570	410	2,390	100	100	100	20	0	0	30	0	30
WW SW – Prairie Pointe	2,070	1,180	560	870	4,670	32	38	33	1,150	1,000	430	2,590	530	3,120
The Oaks area	210	110	0	0	320	66	n/a	66	0	110	0	110	0	110
Ravenhurst East – Cntrbry Cross.	270	90	10	130	510	57	0	42	80	70	10	160	130	290
AA West res – Ph 1A	330	150	160	370	1,000	0	0	0	330	150	160	640	370	1,000
Pr. C – Waterford Grn	580	200	150	190	1,110	91	100	93	0	50	60	110	0	110
Pr. E north – Amber Gates	310	40	0	580	930	100	62	76	0	0	0	0	220	220
Pr. E south	30	10	190	930	1,150	0	8	7	30	10	190	220	860	1,080
Pr. F – North Pt	160	120	50	450	770	100	79	90	0	0	0	0	90	90
Pr. G – North Pt	270	130	100	320	810	53	55	54	120	60	50	230	140	380
Pr. G – Highland Pt	1,040	560	490	1,070	3,160	7	0	5	910	540	490	1,940	1,070	3,010
Pr. G – Area 3	210	100	100	230	630	0	0	0	210	100	100	400	230	630
Pr. G – Area 5	100	50	50	120	320	0	0	0	100	50	50	200	120	320
Pr. I – Summerlea	610	260	310	0	1,190	12	n/a	12	470	260	310	1,040	0	1,040
Pr. J res	370	200	340	1,950	2,870	0	0	0	370	200	340	920	1,950	2,870
Pr. K north – Bonavista	1,010	150	160	700	2,020	77	69	74	130	90	90	310	220	530
Pr. Q-1 – Ridgewood West	790	60	70	0	930	76	n/a	76	130	60	30	220	0	220
Pr. Q-10 – Sctswd Meadow	90	0	0	0	90	98	n/a	98	0	0	0	0	0	0
Pr. T – Cstlbry Meadow	310	400	130	240	1,070	84	15	68	20	80	40	140	210	340
Planned and serviced total	**17,770**	**5,420**	**6,190**	**16,530**	**45,910**	**n/a**			**6,160**	**3,660**	**4,230**	**14,050**	**10,900**	**24,950**

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, BUT UNSERVICED														
AA West res – Ph 1B	410	190	200	460	1,260				410	190	200	800	460	1,260
AA West res – Ph 1C	370	170	180	420	1,140				370	170	180	730	420	1,140
AA West res – Ph 1D	400	190	190	450	1,220				400	190	190	780	450	1,220
Pr. K south	620	290	300	690	1,890				620	290	300	1,200	690	1,890
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	250	170	250	0	660				250	170	250	660	0	660
Pr. Q-4	250	170	250	0	670	n/a			250	170	250	670	0	670
Pr. Q-5	220	150	220	0	600				220	150	220	600	0	600
Pr. Q-7	60	40	60	0	170				60	40	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	**3,140**	**1,390**	**1,670**	**2,010**	**8,210**				**3,140**	**1,390**	**1,670**	**6,200**	**2,010**	**8,210**
UNPLANNED														
Fort Whyte	520	240	250	580	1,580				520	240	250	1,010	580	1,580
South Transcona	1,720	800	840	1,930	5,290				1,720	800	840	3,360	1,930	5,290
Precinct D	4,040	1,880	1,960	4,540	12,420				4,040	1,880	1,960	7,890	4,540	12,420
Precinct B	1,410	660	690	1,590	4,340				1,410	660	690	2,760	1,590	4,340
St. Vital PS – w/o St Anne's	3,940	1,830	1,910	4,430	12,110				3,940	1,830	1,910	7,690	4,430	12,110
St. Vital PS – e/o St Anne's	1,290	600	630	1,450	3,960	n/a			1,290	600	630	2,510	1,450	3,960
Wilkes South	11,810	5,480	5,730	13,260	36,280				11,810	5,480	5,730	23,020	13,260	36,280
St. Norbert – e/o by-pass	2,810	1,300	1,360	3,150	8,620				2,810	1,300	1,360	5,470	3,150	8,620
St. Norbert – w/o by-pass	4,930	2,290	2,390	5,530	15,140				4,930	2,290	2,390	9,610	5,530	15,140
Unplanned total	**32,470**	**15,070**	**15,770**	**36,440**	**99,750**				**32,470**	**15,070**	**15,770**	**63,300**	**36,440**	**99,750**

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

Figure 6-17 below describes the residential densities that these sites are projected to build to. The methodology used to arrive at these densities is described in Step Two of Section A.1.

Greenfield sites	Assumed density at full build out (u/a net)	
	Standard	Alt. higher
Sage Creek	12.3	12.8
TW – Devonshire Village	28.3	29.6
TW – Devonshire Park	13.9	14.9
TW – Crocus	14.9	14.9
TW – Special Planning Area	30.0	33.9
WW NW – Bridgwater Lakes	7.9	8.1
WW Town Centre	15.0	16.9
WW W – Bridgwater Trails	13.2	14.1
WW B – Bison Run	22.0	25.3
WW SE – South Pointe	11.4	11.4
WW SW – Prairie Pointe	14.4	15.9
The Oaks area	5.2	5.2
Ravenhurst East – Canterbury Crossing	12.2	13.2
Pr. C – Waterford Green	12.6	12.6
Pr. E north – Amber Gates	21.4	23.1
Pr. E south	28.4	31.7
Pr. F – North Point	21.1	21.6
Pr. G – North Point	18.7	20.6
Pr. G – Highland Pointe	13.6	15.5
Pr. I – Summerlea	12.5	13.6
Pr. J residential	20.8	24.6
Pr. K north – Bonavista	15.9	16.5
Pr. Q-1 – Ridgewood West	10.0	10.2
Pr. Q-10 – Scotswood Meadows	6.6	6.6
Pr. T – Castlebury Meadow	17.4	17.8
All other sites projected to an average greenfield density	14.5	15.6

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

The charts below illustrate the mix of forecasted dwelling units by site using both the Standard and Alternative Higher supply scenarios.

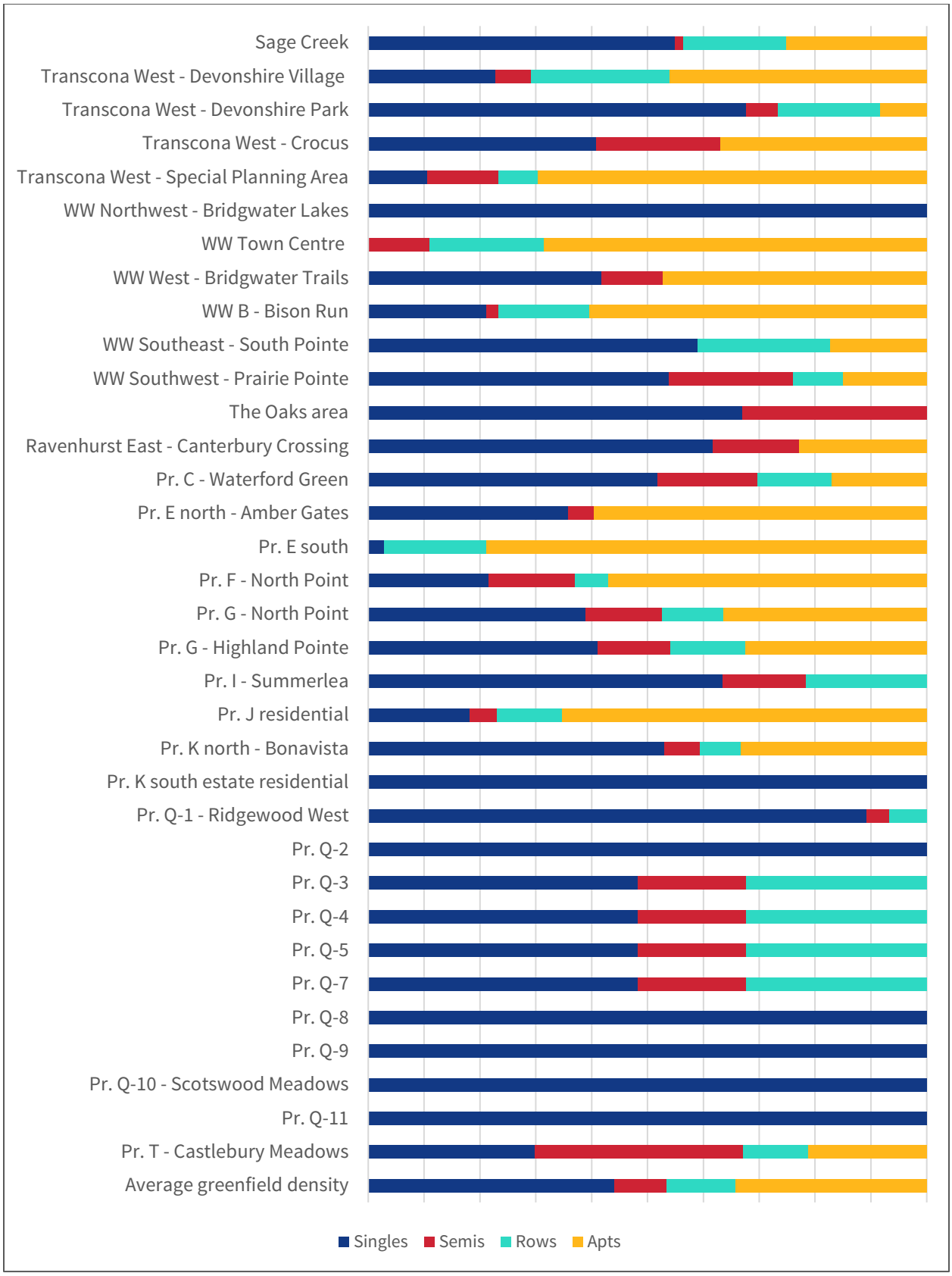

Figure 6-18: Forecasted dwelling unit mix, Standard supply scenario

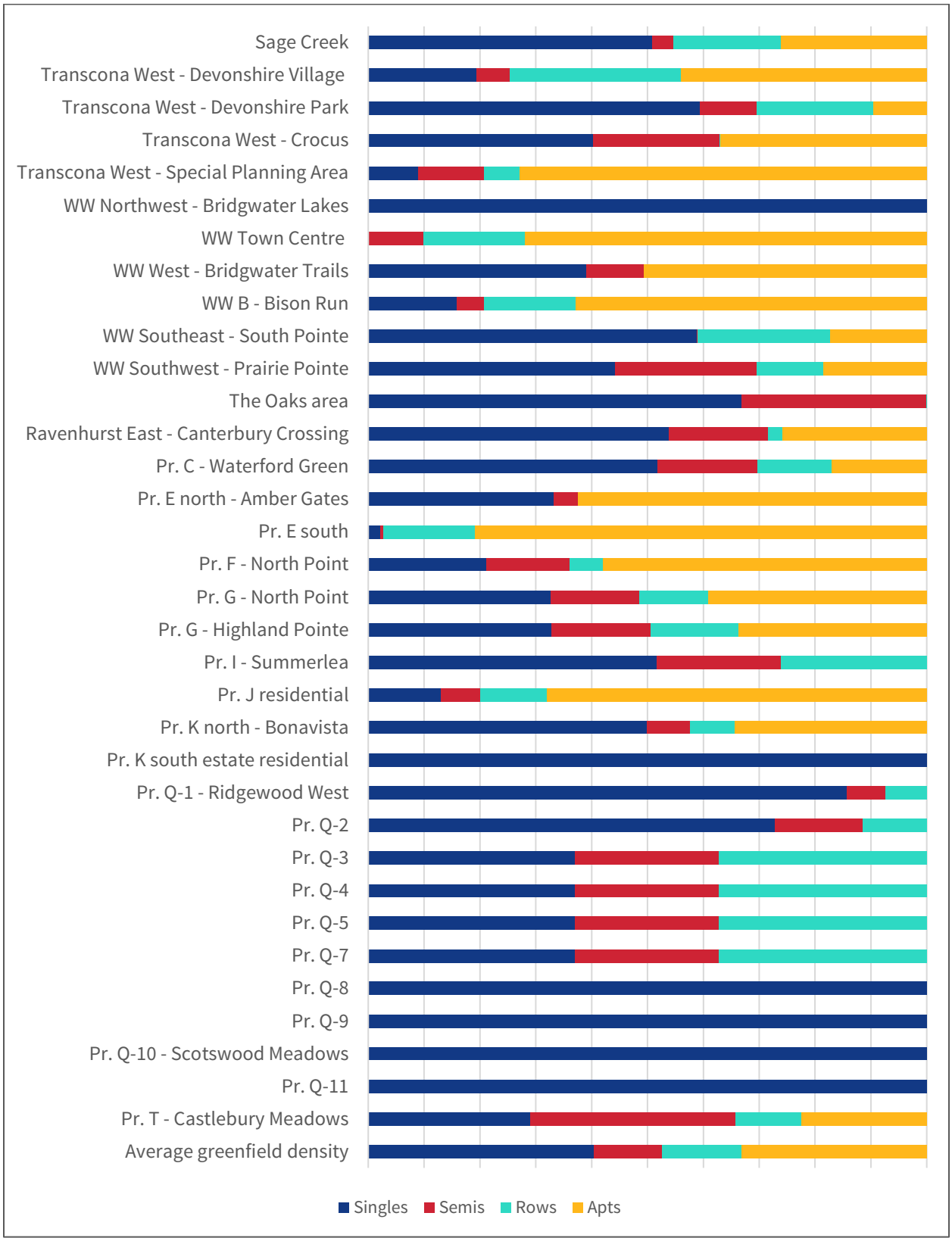

Figure 6-19: Forecasted dwelling unit mix, Alternative Higher supply scenario

As described in Section A.1, these supply forecasts were developed using a standardized methodology. In some instances, consultation with development industry stakeholders yielded messages that, while not aligning with the methodology and therefore not warranting changes to the site forecasts, are nonetheless worth noting. They are as follows:

- The landowner has indicated that at least some portion of the approximately 100 acres of land designated for commercial development in the Waverley West Southeast and Southwest secondary plans will be rezoned for residential development.
- The major landowner of Waverley West B expects the area to yield lower dwelling unit totals than what is being forecasted; high levels of land ownership fragmentation, particularly along Cadboro Rd, may reduce yields or postpone development indefinitely.
- A major landowner in Precinct K South indicated that the site will likely be developed at lower-than-average residential densities, particularly west of the railway tracks. This is attributed to higher acquisition costs associated with the area's high degree of land ownership fracture and land use designations in the existing precinct plan. The landowner also indicated that they expect the area to take a long time to develop.
- While the Urban Planning & Design Division has not engaged with Fort Whyte's landowner in some time, earlier design concepts were centered largely on lower density single-detached dwellings.

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

In accordance with this report's methodology, these discrepancies will be accounted for in the City's supply forecasts once a subdivision and rezoning application has been approved by Council.

7.0 Non-Residential Development Activity

7.1 Development Activity

The tables below describe permits issued for non-residential construction, expressed in both jobs as well as building floor area. Job types and assumed floor area per job assumptions are described in Section A.2.

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
2018	80	240	870	2,210	70	160	3,630
2019	320	230	210	1,490	710	220	3,180
2020	110	210	550	530	290	410	2,100
2021	330	160	50	520	220	320	1,600
2022	510	680	1,640	510	250	410	3,990
2018-22 avg.	270	300	660	1,050	310	300	2,900

Figure 7-1: Non-residential development activity, 2018-22, by estimated number of jobs[1]

Year	Education	Industrial	Office	Retail	Service	Warehousing	Total
2018	53,700	255,500	259,400	952,200	51,500	165,300	1.7m
2019	220,500	235,600	60,000	641,500	437,000	233,300	1.8m
2020	73,300	222,100	160,700	229,500	200,700	441,700	1.3m
2021	229,100	150,500	15,500	224,100	156,500	339,500	1.1m
2022	355,030	735,020	476,880	219,870	159,750	437,930	2.4m
2018-22 avg.	186,330	319,740	194,500	453,430	201,090	323,550	1.7m

Figure 7-2: Non-residential development activity, 2018-22, by building floor area (sq. ft.)

In 2022, notable major non-residential projects included:

- A 23 storey, 375,000 sq. ft. office tower for Wawanesa at 236 Carlton St in the South Portage neighbourhood.
- A 16 storey, 349 unit student dormitory[2] at 2537 Pembina Hwy in the Fairfield Park neighbourhood.
- A 190,000 sq. ft. air cargo logistics warehouse at 2020 Sargent Ave in the Airport neighbourhood.
- A 130,000 sq. ft. BeeMaid Honey manufacturing processing facility at 645 Black Diamond Blvd in the St Boniface Industrial Park neighbourhood.
- A four storey, 93,000 sq. ft. office building for PayWorks at 90 Payworks Way in the South Pointe neighbourhood.

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

[2] Communal residences are considered non-residential development

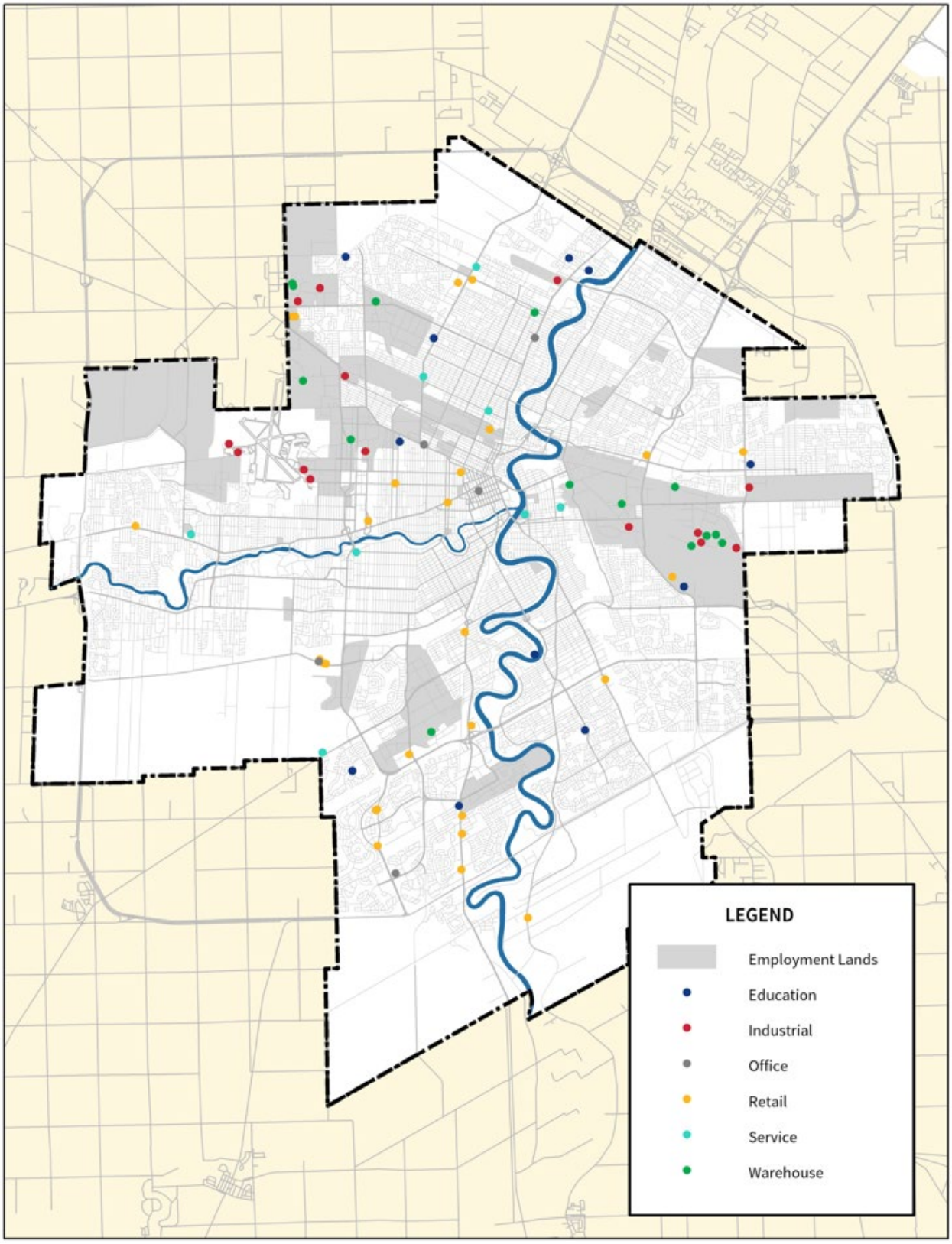

Figure 7-3: Location of non-residential development activity, 2022, by job type

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

By building type	2018	2019	2020	2021	2022	2018 22 avg.
Addition	18%	21%	27%	20%	20%	21%
New building	82%	79%	73%	80%	80%	79%

Figure 7-4: Non-residential development activity by building type, 2018-22, as share of total building floor area

By land uptake	2018	2019	2020	2021	2022	2018 22 avg.
Absorption of vacant land	23%	37%	51%	8%	52%	34%
Intensification of developed land	77%	63%	49%	92%	48%	66%

Figure 7-5: Non-residential development activity by land uptake, 2018-22, as share of total estimated jobs

The charts below indicate the share of job types in each Employment Land quadrant. This shows that each quadrant is desirable for different uses. For example, the East quadrant appears to be most desirable for industrial/manufacturing jobs, the Northwest for warehousing, and the Southwest for office jobs. This is consistent with what has been described by stakeholders over the years.

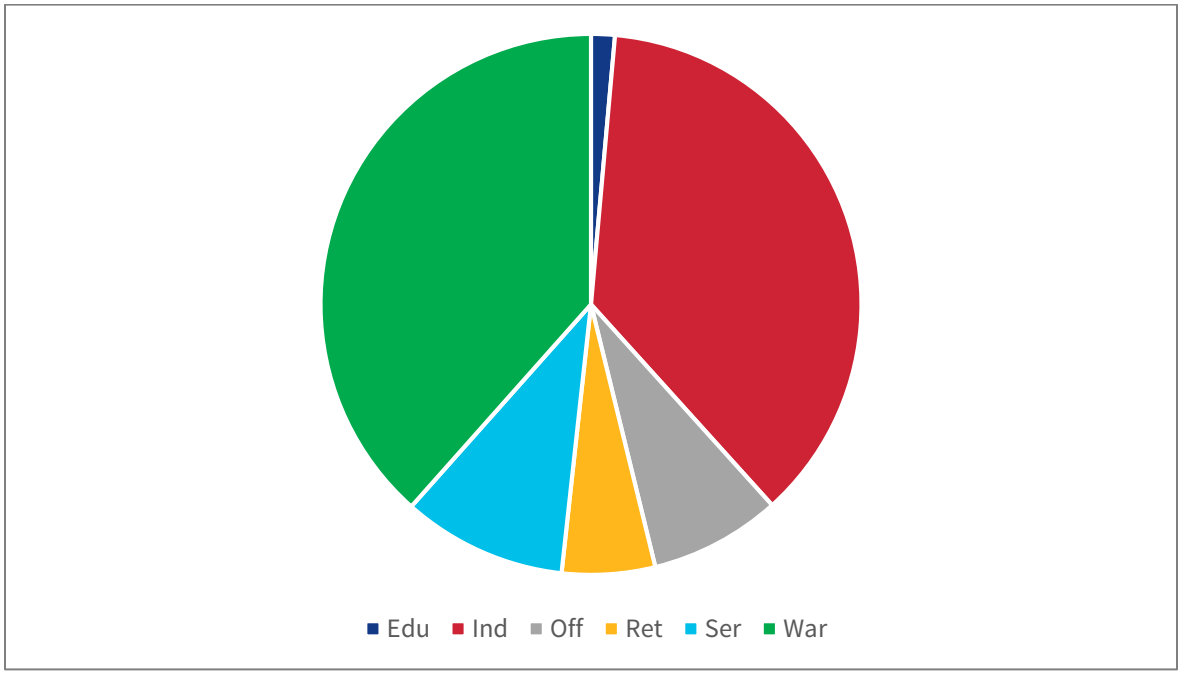

Figure 7-6: Non-residential development activity in designated Employment Lands by job type, East quadrant 2018-22

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

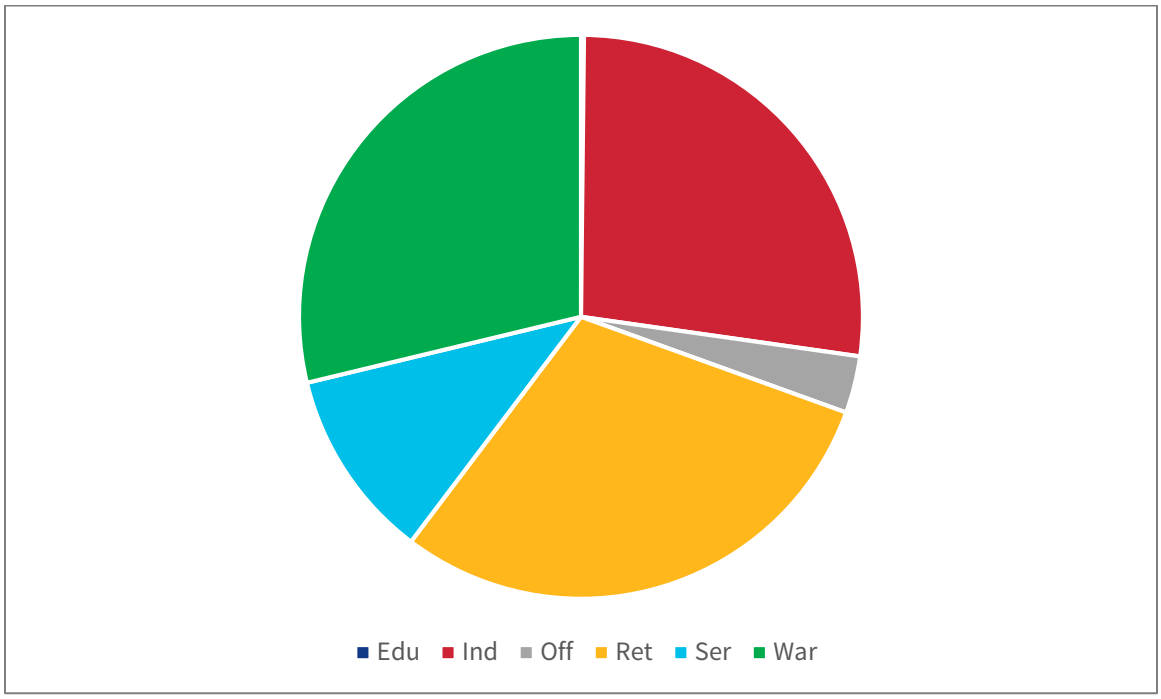

Figure 7-7: Non-residential development activity in designated Employment Lands by job type, Northwest quadrant 2018-22

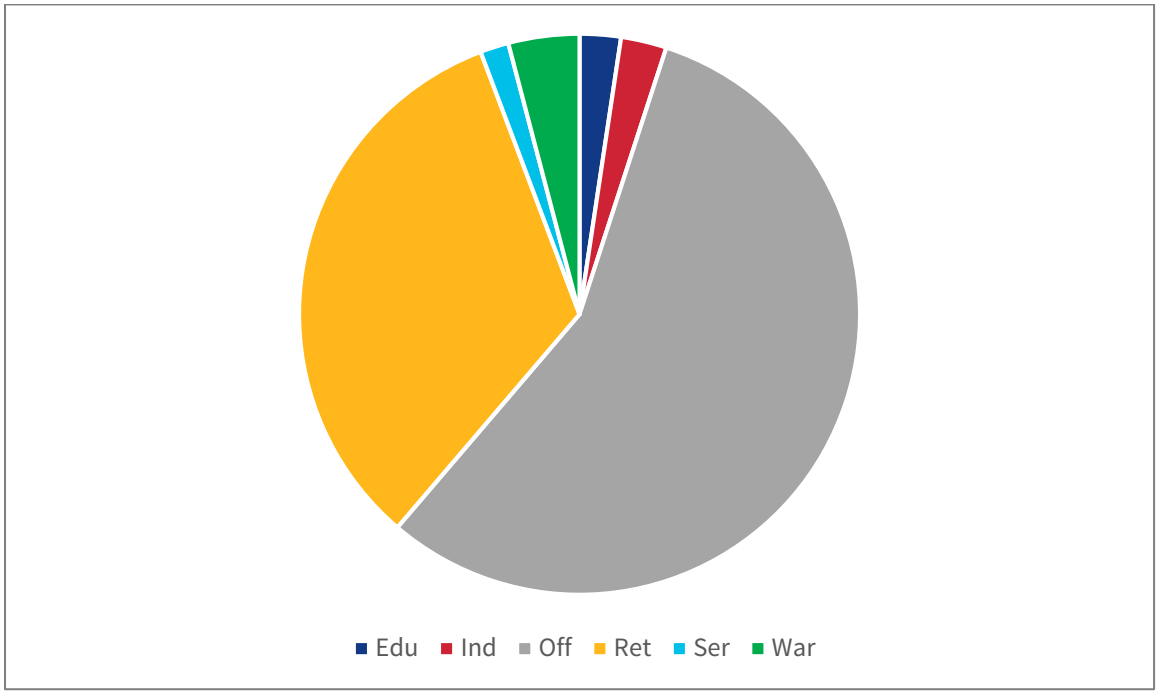

Figure 7-8: Non-residential development activity in designated Employment Lands by job type, Southwest quadrant 2018-22

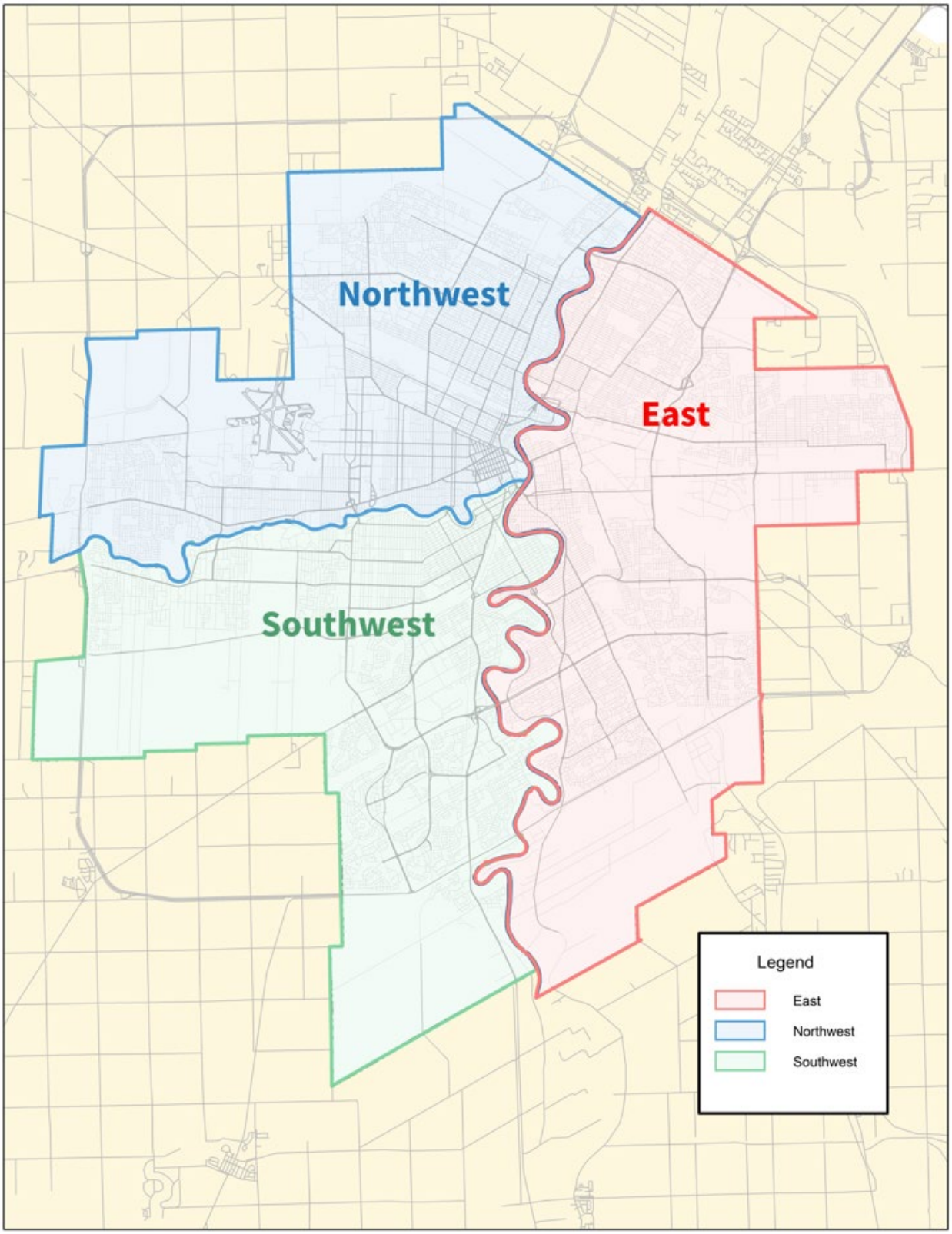

Figure 7-9: Quadrants used for measuring non-residential development activity

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 the East and Northwest is favoured lower-density industrial, manufacturing, and warehousing uses, while the Southwest is favoured for higher-density office uses.

Quadrant	2018	2019	2020	2021	2022	2018 22 avg
East	21%	14%	48%	17%	43%	29%
Northwest	8%	49%	21%	79%	54%	42%
Southwest	71%	38%	31%	4%	3%	29%

Figure 7-10: Non-residential development activity in designated Employment Lands by quadrant, 2018-22, as share of total estimated jobs

Quadrant	2018	2019	2020	2021	2022	2018 22 total
East	45%	20%	57%	19%	43%	37%
Northwest	6%	54%	30%	78%	53%	44%
Southwest	50%	26%	14%	4%	4%	20%

Figure 7-11: Non-residential development activity in designated Employment Lands by quadrant, 2018-22, as share of total building floor area

7.2 Industrial Absorption

The last five years saw an annual average of 61 acres of vacant industrial-zoned land[1] absorbed[2] in the City of Winnipeg, with a low of 38 acres in 2021 and a high of 84 acres in 2020. This is an increase from the 35 acre per year average from 2011 to 2016[3]. During this time period, 148 acres were absorbed in the East quadrant, followed by 115 acres in the Northwest and 46 acres in the Southwest. There is a high level of variability year-over-year.

Year	East	Northwest	Southwest	Total
2017	29	3	26	58
2018	16	1	23	40
2019	5	72	6	82
2020	47	20	17	84
2021	30	9	0	38
2022	50	13	0	63
2018-22 total	**148**	**115**	**46**	**307**
2018-22 avg.	**30**	**23**	**9**	**61**

Figure 7-12: Absorption of vacant industrial-zoned land, in acres, 2018-22[4]

[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] Pg 4-26, City of Winnipeg Employment and Commercial Lands Study, May 16, 2018

[4] Figures rounded

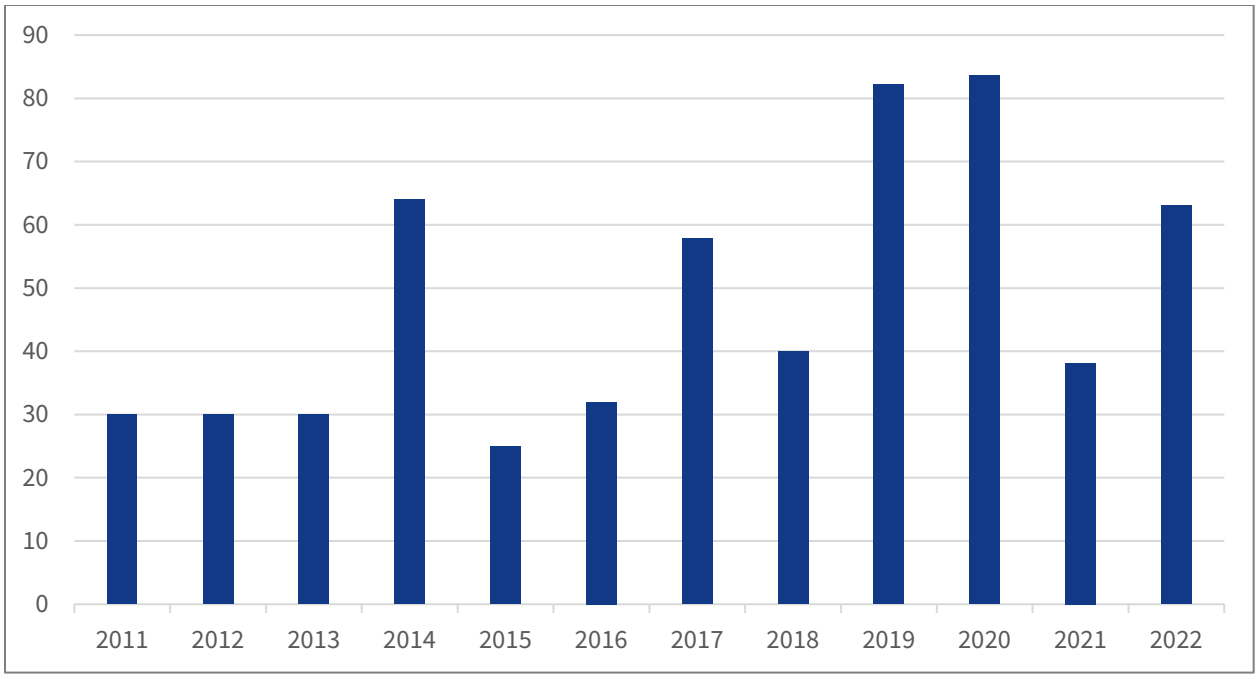

Figure 7-13: City-wide absorption of vacant industrial-zoned land, in acres, 2011-2022

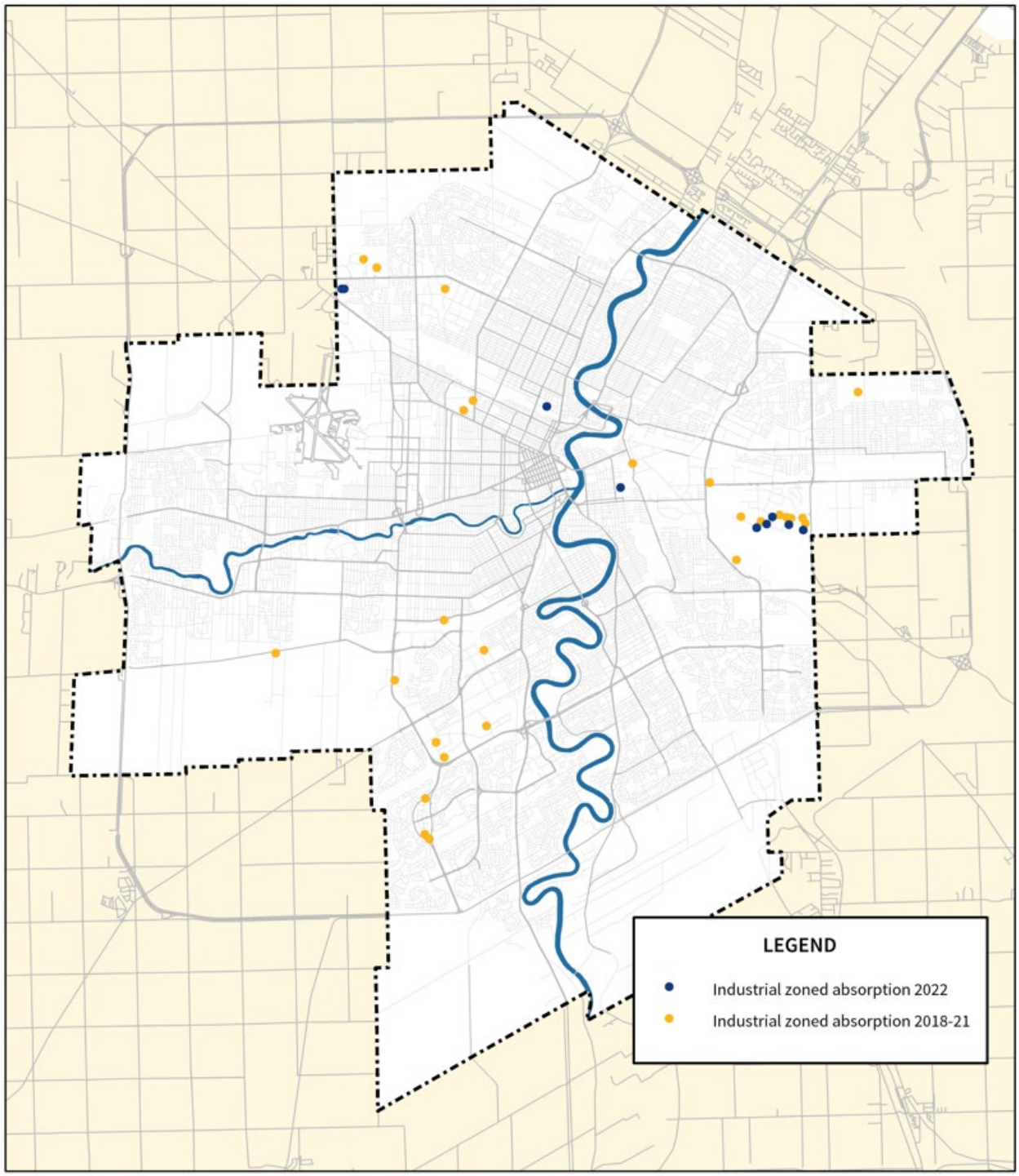

Figure 7-14: Industrial-zoned absorption, 2018-2022

The table below compares City of Winnipeg absorption with figures from nearby employment areas in individual Capital Region municipalities as identified in Figure 7-16. Rural municipality absorption was determined by comparing aerial photography from June 1, 2017 to April 9, 2021 for the 2017 to 2020 period, and then May 9, 2022 for the 2021 period. Properties were considered absorbed if a building was erected between the two photos. These figures are then compared to City building permit data.

Municipality	2011 16	2017 20		2021	Serviced with water and sewer
	Annual avg. (ac)	Land absorbed (ac)	Annual avg. (ac)	Land absorbed (ac)	
City of Wpg	35	264	66	38	Serviced
Headingley	10	99	25	24	Serviced
Macdonald	7	36	9	10	Serviced
Rosser	22	162	41	87	Serviced
Springfield	7	52	13	13	Not serviced
West St Paul	3	28	7	11	Kapelus Rd is serviced, West St Paul Industrial Area is not

Figure 7-15: Industrial land absorption, City of Winnipeg and Capital Region employment areas, 2017-21

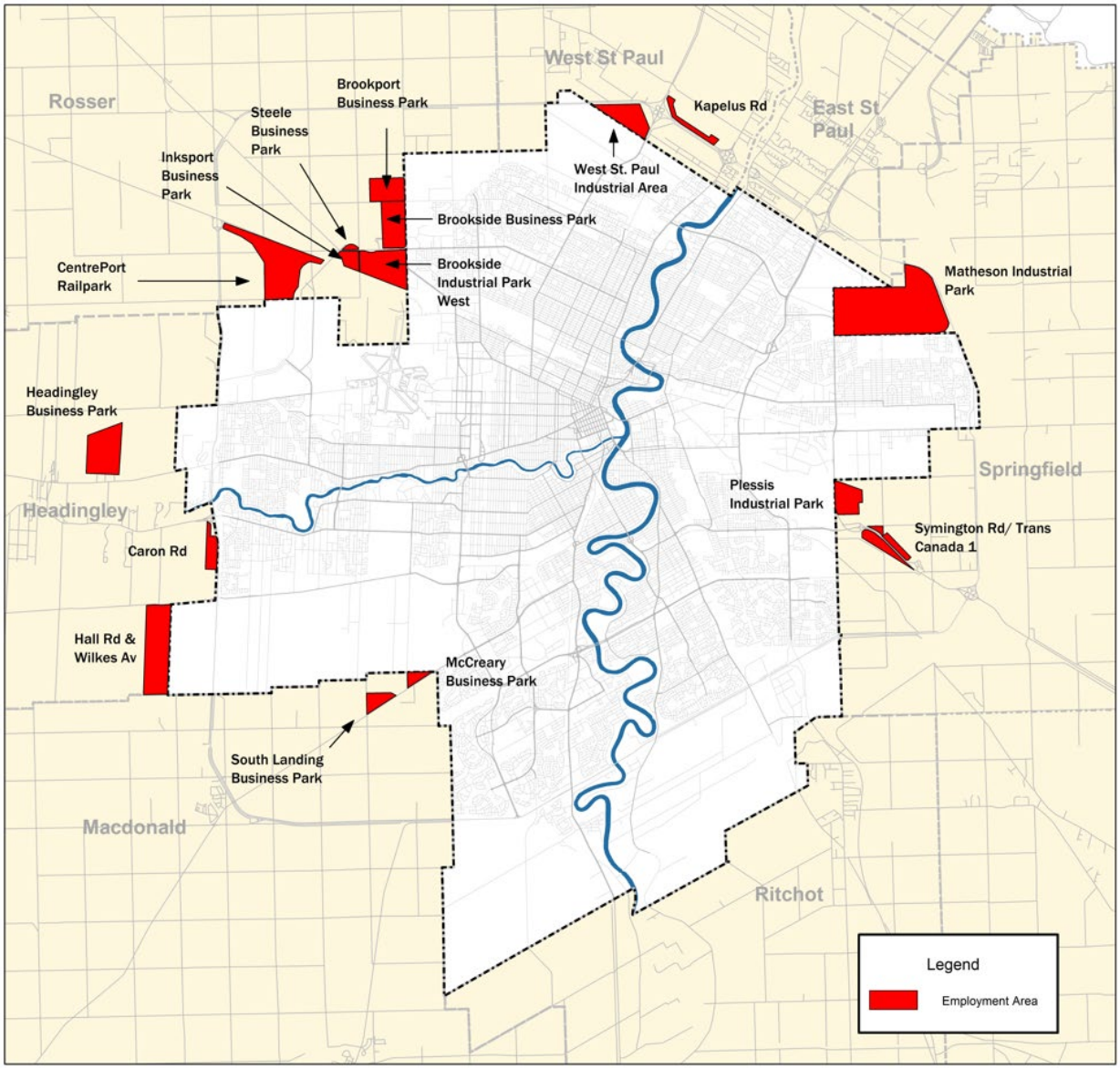

Figure 7-16: Selected Capital Region employment areas adjacent to the City of Winnipeg

2021 saw the City's share of overall Capital Region employment land absorption decline from 41% in 2017-2020 to 21% in 2021. While City figures were lower than in previous years, the RM of Rosser also experienced double the absorption rate compared with its annual average from 2017 to 2020.

Jurisdiction	Land absorption					
	2011 to 2016[1]		2017 to 2020		2021	
	Ac	%	Ac	%	Ac	%
City of Wpg	213	35	264	41	38	21
Selected Capital Region	395	65	379	59	145	79
Total	608	100	643	100	183	100

Figure 7-17: Industrial land absorption, City of Winnipeg and selected Capital Region employment areas

Some stakeholders have expressed concern that the City's approach in quantifying absorption, whereby large sites are considered to be absorbed even if development occurs on only a small portion of the lot, may misrepresent development activity. As a result, rates of "adjusted absorption" were determined that only recognized the portion of a larger site that was being developed. Figure 7-18 below illustrates the difference in these two approaches. Under the first approach, the full area in orange was considered to be absorbed in 2019 following the construction of the first warehouse, with subsequent warehouse development to be considered intensification. Under the second adjusted approach, the area corresponding to the construction of the site's second warehouse (area in teal) was considered to be absorbed.

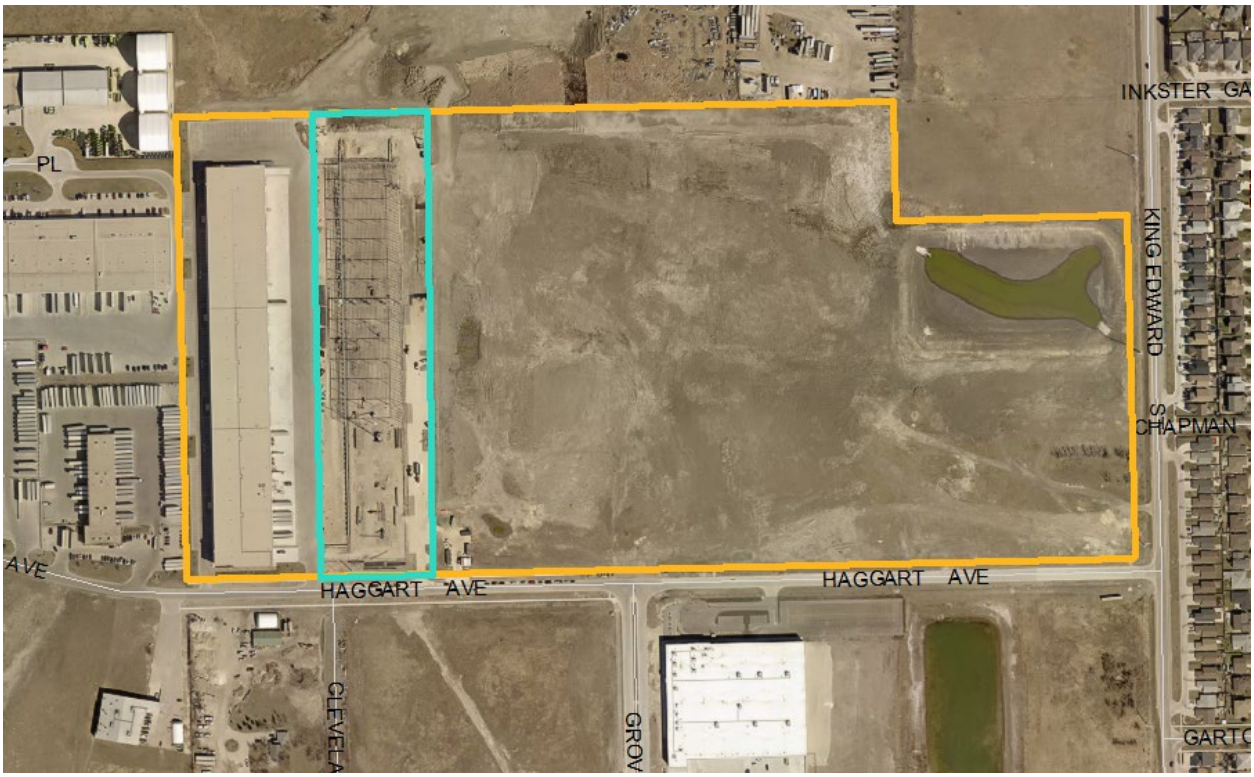

Figure 7-18: Illustration of this report's approach to absorption (orange) vs adjusted absorption (teal)

[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.

This alternative adjusted absorption approach results in relatively minor differences compared to the report's standard approach. Note that these adjusted figures should not be compared to this report's Capital Region absorption figures, as they were not prepared using the adjusted methodology.

Year	Absorption (ac)	"Adjusted absorption" (ac)
2020	84	52
2021	38	33
2022	63	60

Figure 7-19: City of Winnipeg absorption vs "adjusted absorption", 2020 to 2022

8.0 Non-Residential Land Supply

8.1 Industrial Land Supply

As described in Section A.2, this analysis considers several categories of industrial land supply. All told, it identified 334 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, 2023. Based on the Employment Land demand analysis prepared for the Winnipeg Metropolitan Region's Plan 20-50, this translates to 5.6 years. Additional supply exists where sites may be locally serviced but encumbered, locally unserviced but regionally serviced, where they may be designated for employment uses but not zoned, and where a reasonable amount of intensification could occur on existing occupied sites[3]. These supplies are described in Figure 8-1 below.

For the purposes of reporting, this first category is most reflective of development-ready lands and should therefore garner the most emphasis; while other supply categories should be noted, constraints to bringing them online should be recognized.

	Category	Regionally serviced		Designated	Intensification potential
		Shovel ready, unencumbered	Locally unserviced[4]		
Supply	Net supply (ac)	334[5]	621	2,383	776
Forecast	Land need, 2022-51 (ac)	1,808			
	Shortfall	-1,473	-1,249	+575	n/a
	Years supply	5.6	9.3	39.5	12.9

Figure 8-1: Estimated vacant industrial land supply, City of Winnipeg, as of January 1, 2023

Compared to last year, estimated land supplies decreased beyond the rate of absorption due to methodological refinement where the supply was more closely scrutinized to reflect land that is realistically available for potential development, particularly where vacant properties appeared to be integrated into the operations of adjacent parcels. Intensification potential figures have also changed considerably as a result of adopting a new methodology that more accurately captures potentially developable land.

[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] Additional regionally serviced, shovel-ready, encumbered supply is 250 acres.

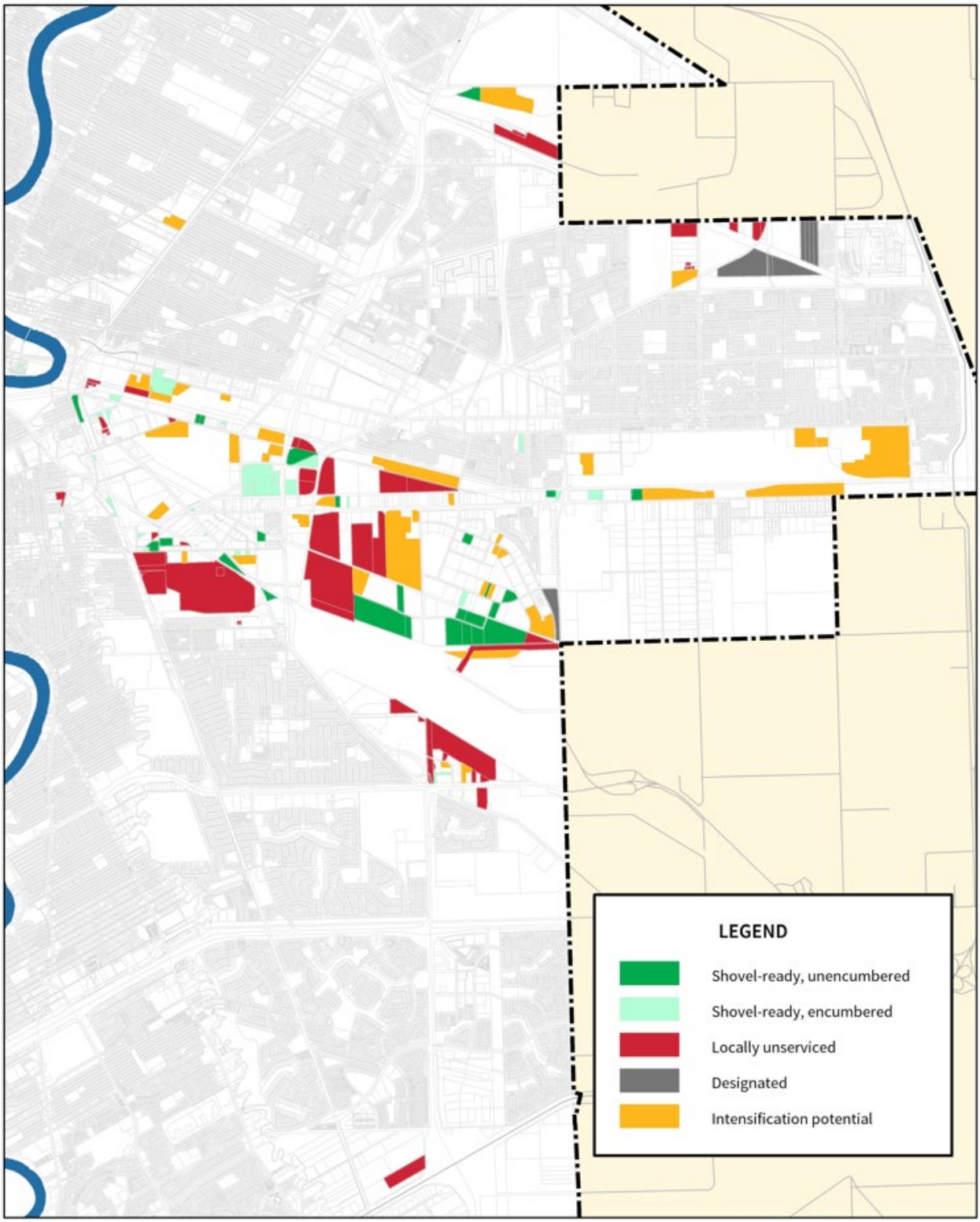

Figure 8-2: Map of estimated vacant industrial land supply, City of Winnipeg East quadrant, as of January 1, 2023

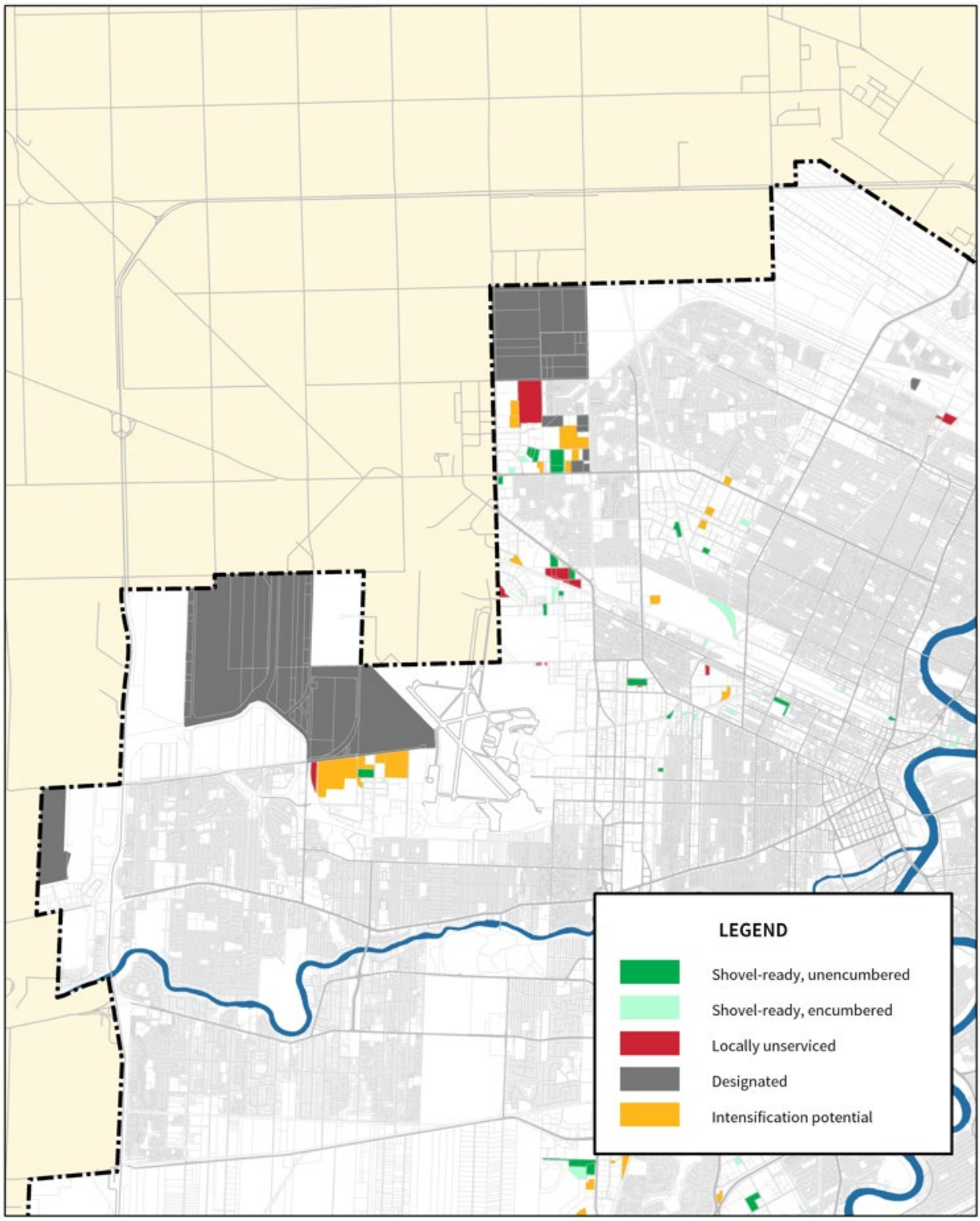

Figure 8-3: Map of estimated vacant industrial land supply, City of Winnipeg Northwest quadrant, as of January 1, 2023

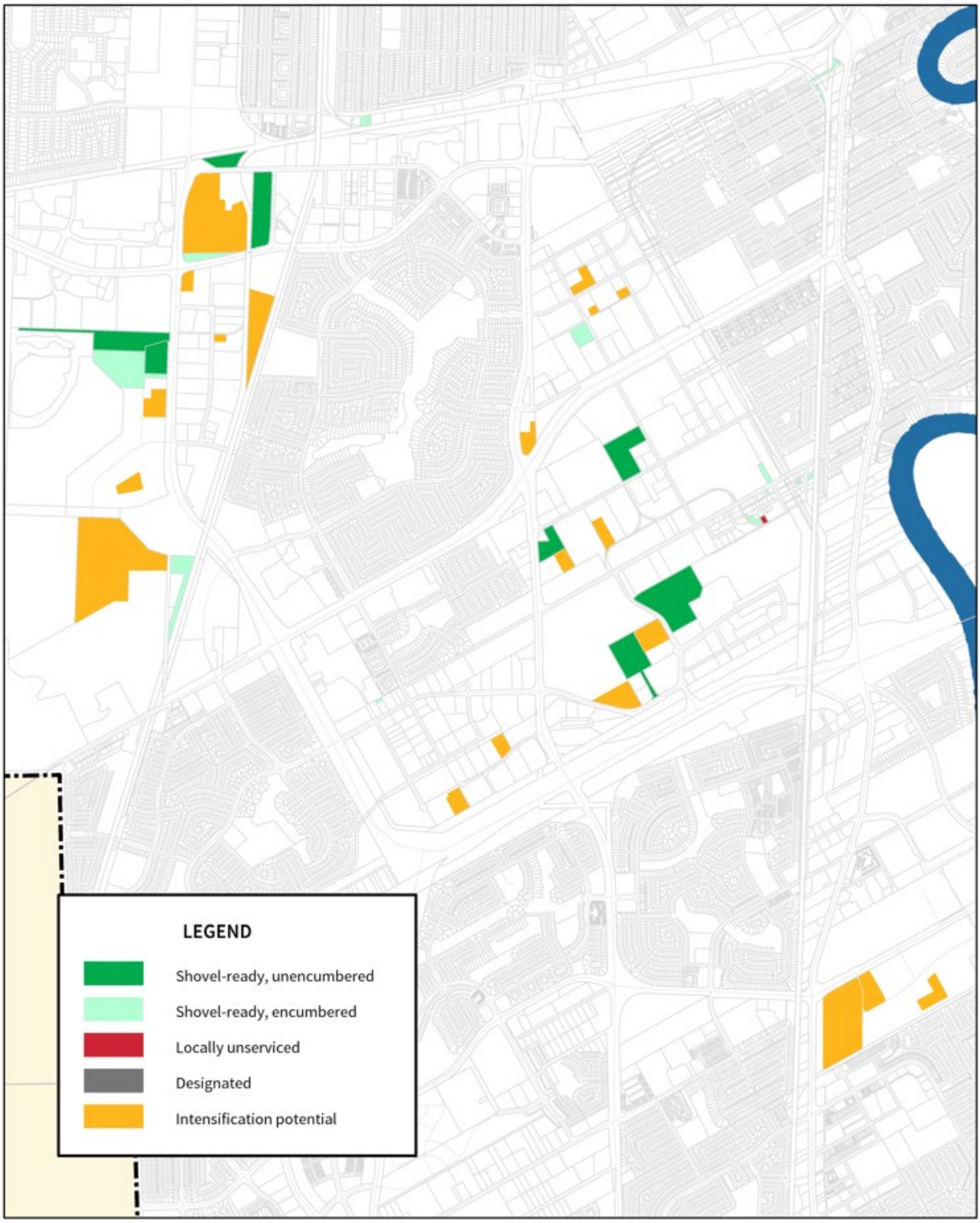

Figure 8-4: Map of estimated vacant industrial land supply, City of Winnipeg Southwest quadrant, as of January 1, 2023

These supplies are reduced as one considers site size and quadrant. Regarding quadrant, the majority of the City's supply falls within the East quadrant, with considerably less in the Northwest and Southwest.

Category	Regionally serviced		Designated	Intensification potential
	Shovel ready, unencumbered	Locally unserviced		
Land area on sites > 5 ac	250	512	n/a	674
Land area on sites > 10 ac	180	390	n/a	556
East quadrant	172	485	74	413
Northwest quadrant	80	136	2,309	192
Southwest quadrant	82	0	0	171

Figure 8-5: Estimated vacant industrial land supply, City of Winnipeg, by site size and by quadrant

An important part of the City's existing industrial land supply falls within identified industrial Emerging Sites, most notably the St Boniface Industrial area.

Sites	Regionally serviced		Intensification potential
	Shovel ready, unencumbered	Locally unserviced	
All Emerging Sites	173	309	164
Cavalia Lands	16	0	35
Inksbrook	30	74	75
Public Markets	0	73	2
St Boniface Industrial	127	163	52
Smart Park	0	0	34

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

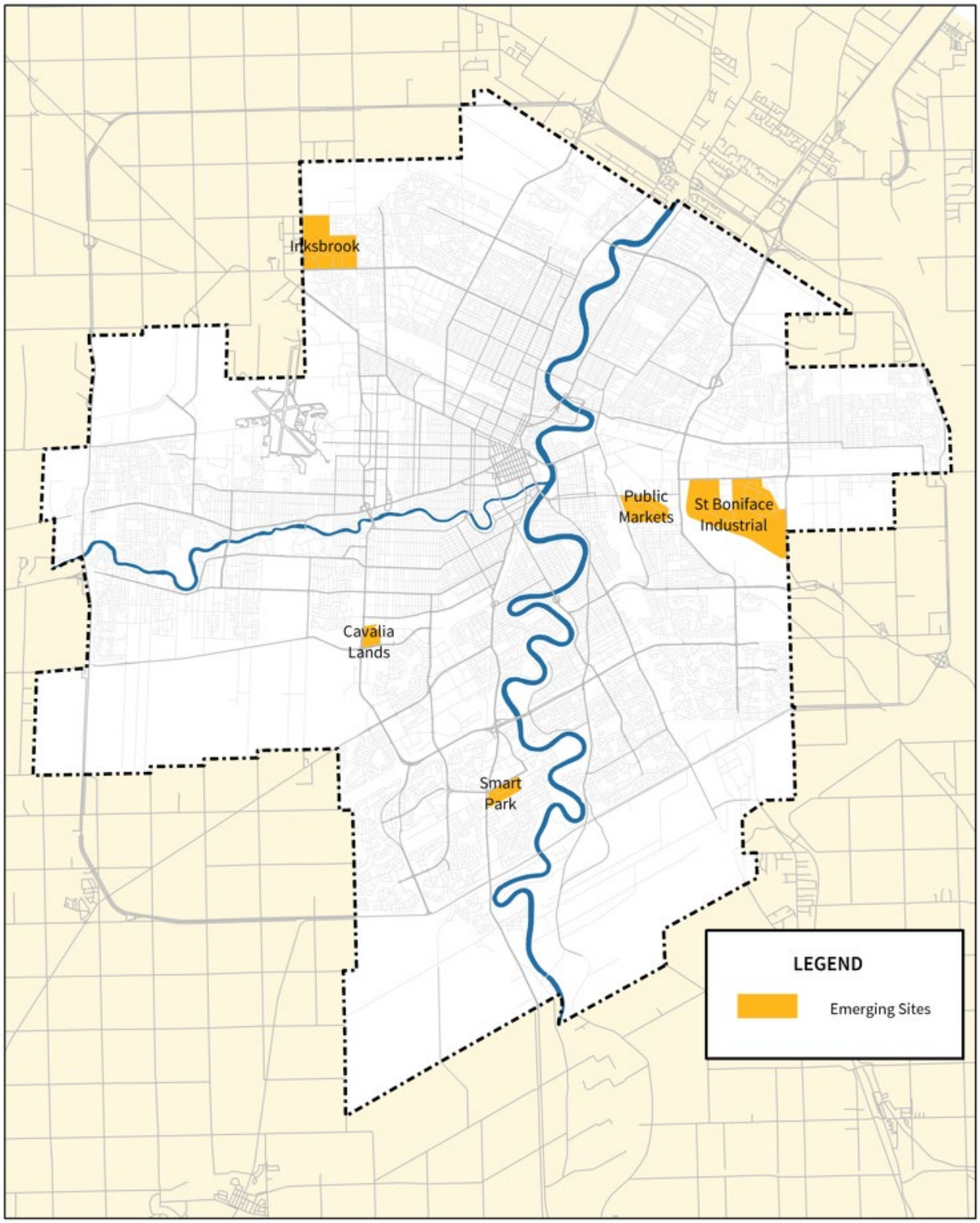

Figure 8-7: Identified industrial Emerging Sites

At first glance, this supply may seem reasonable. However, as it relates to the City's stated aims of accommodating forecasted industrial growth and promoting competitiveness and

economic diversity, these numbers fail to tell the full story. 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, while this analysis identified and quantified vacant land, much of it may not be actively marketed at a given time or held by a property owner willing to sell. This point has been emphasized by stakeholders in the past who, when describing an industrial land supply discrepancy between the City and nearby rural municipalities, more specifically referred to available marketed land. Additional analysis could compare active listings across jurisdictions.

In January 2023, the Province of Manitoba announced funding for the servicing of the first phase of CentrePort South which, combined with Council's share, will enable its development. This engineering work is currently being designed. However, until services are installed in this area, the City's industrial land supply should be considered constrained.

Additional consideration of City-owned sites is warranted. Cities often own vacant industrial land to facilitate economic development opportunities. As of September 15, 2023, there is 87.6 acres of vacant serviced industrial land available for sale in the St Boniface Industrial Park. These lands would be considered shovel-ready.

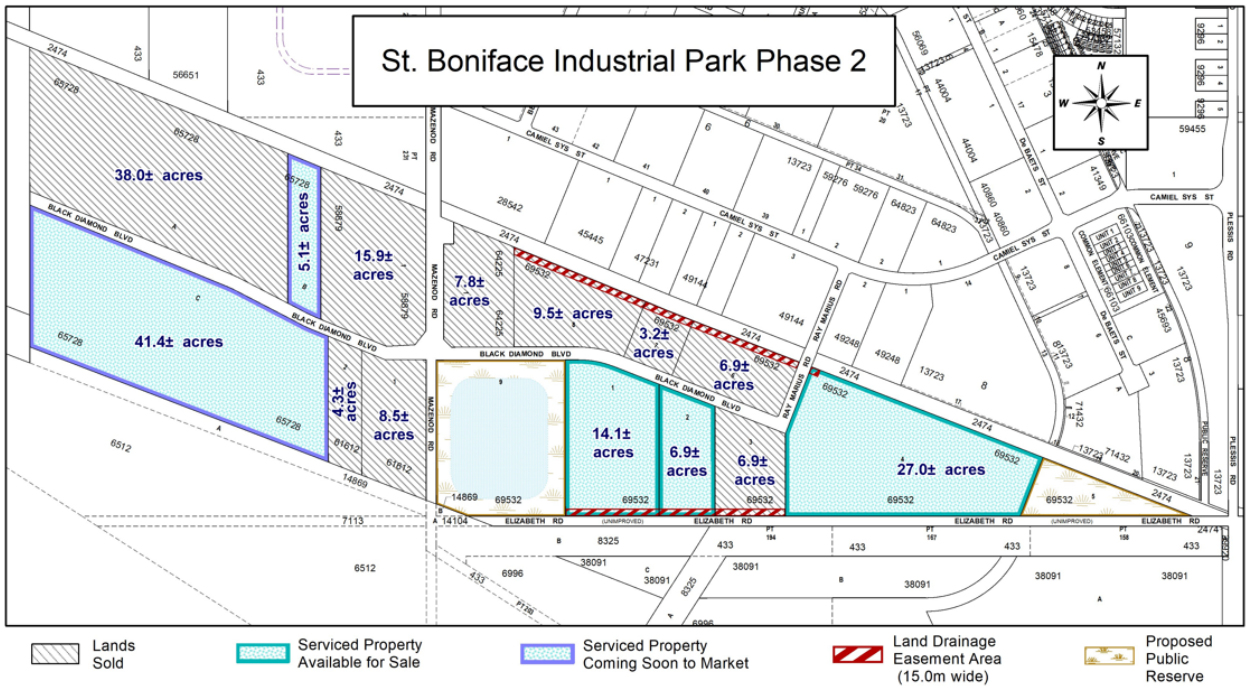

Figure 8-8: Available City-owned vacant industrial land for sale as of September 15, 2023

8.2 Commercial Land Supply

This analysis identified a vacant commercial land supply of 578 acres as of January 1, 2023. 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 392 ac to 2041, this represents approximately 27 years of supply.

Total commercial supply	
Vacant commercial-zoned	360 ac
Approved but non-vested in RMU Centres and Emerging Sites	172 ac
Cont'd build-out in RMU Centres and Emerging Sites	49 ac
Total	578 ac
Forecasted demand, 2023 41[1]	
Forecasted demand	392[2] ac
Shortfall/surplus	+189 ac
Forecasted annual absorption	22 ac
Years supply	27 years

Figure 8-9: Commercial supply and forecasted demand

Compared to last year's report, the City's supply of vacant commercial-zoned land increased, as a number of rezoning applications for sites that were previously classified as "approved but non-vested" were finalized. There is also reduced supply in existing RMU Centres and Emerging Sites as they continue their build-out.

[1] The 2022 Land Monitoring Report considered a second demand scenario assuming higher retail expenditures as e-commerce. However, it found that the differences between the two scenarios were negligible. Analysis for this 2023 report identified a forecasted demand of 380 acres and 27 years of supply. As a result, it will not be used for reporting purposes.

[2] Closer review found that the 2022 report overestimated demand for commercial land, having erroneously included 2016 to 2021 demand in its 2022 to 2041 forecast.

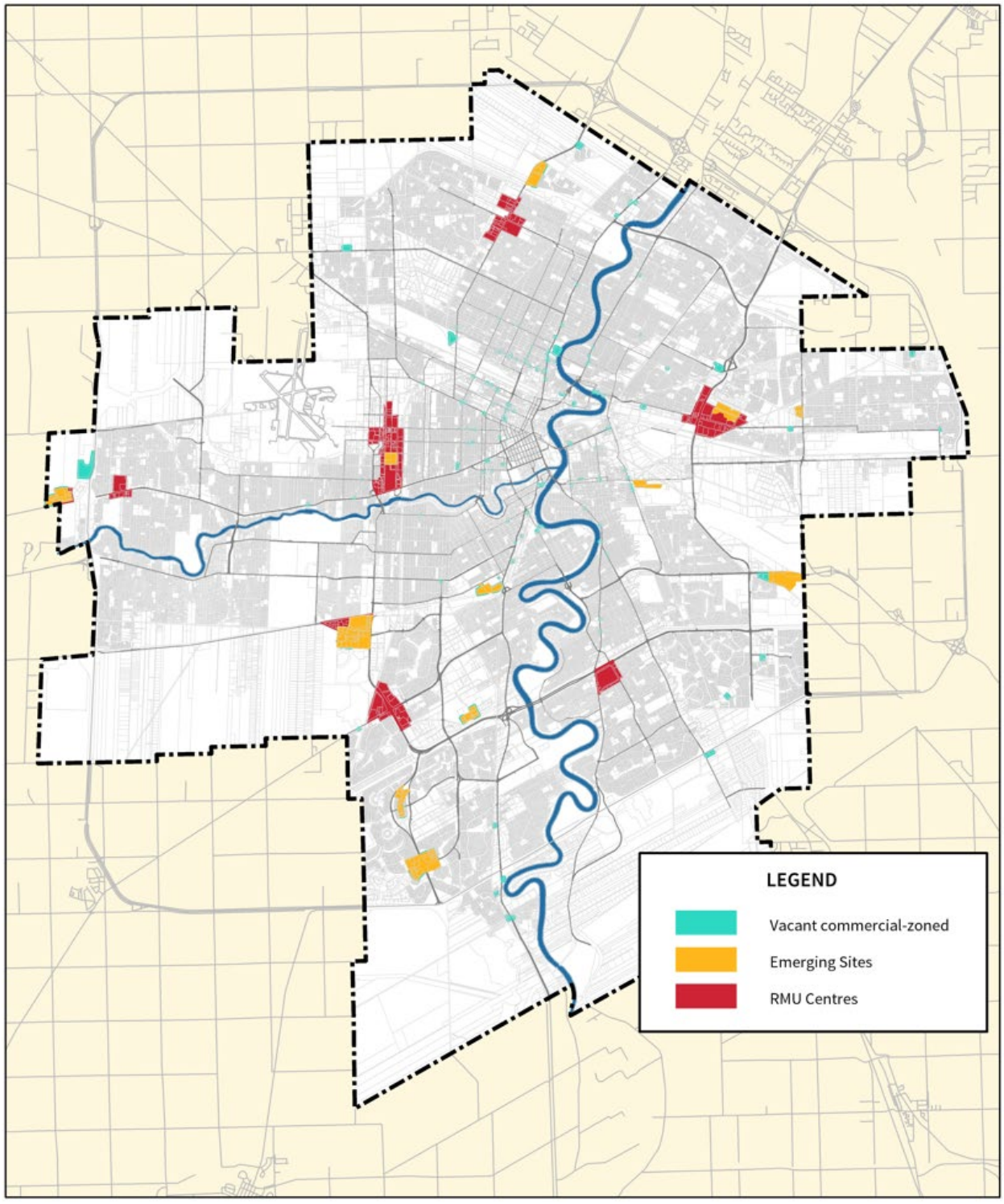

Figure 8-10: Map of commercial supply

The continued build-out of RMU Centres and commercial Emerging Sites are a critical source of the City's commercial land supply. The table below details the components of this supply.

Sites	Vacant commercial zoned land, ac	Approved but non vested land, ac	Lot coverage[1], %[2]	Intensification potential[3], ac (land area equivalent)
Emerging Sites	226	172	n/a	37
Old Stadium site	16	-	0.14	0
Outlets of Tuxedo[4]	5	-	0.22	5
Precinct J	0	71	0.00	-
Precinct F	44	-	0.00	-
Public Markets	0	27	0.00	-
Ravelston-Plessis	0	-	0.19	3
Reenders	0	27	0.00	-
Seasons of Tuxedo	11	-	0.15	22
Sugar Beets	15	-	0.04	6
Taylor Lands	23	-	0.10	0
Waverley West South Pointe	39	47	0.02	1
Waverley West Town Centre	10	-	0.18	0
Westport Festival	62	-	0.00	-
Regional Mixed Use Centres	81	n/a	n/a	12[5]
Kenaston-McGillivray	0		0.24	7
McPhillips-Leila	0		0.27	0
Polo Park	20		0.34	0
Regent-Lagimodiere	2		0.26	7
Seasons of Tuxedo	16		0.22	~~10~~
St Vital	2		0.30	0
Unicity	1		0.24	3
Westport Festival	40		0.02	-

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

These results affirm the continued persistence of an oversupply of commercial land first identified in the *2018 Employment and Commercial Lands Study*. This study warned of the

[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] Considers 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.

potential consequences of such a surplus, noting that, “this surplus of commercial land will affect retail commercial intensification development opportunities in Winnipeg”, and that, “it is anticipated that there will be limited market-related incentive to develop retail commercial space in multi-level or mixed-use formats in much of the City in the near term”. It also warned that, “The City may wish to be cautious about making additional commercial lands available for development at this time, as an oversupply of developable land may result in commercial uses being ‘cannibalized’ and relocated from existing commercial areas”[1].

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

9.0 Growth Management

9.1 Achieving the Intensification Target

The General Growth section of *Complete Communities 2.0* (CCDS) establishes the following intensification targets:

- A minimum of 50% of all new dwelling units to be located in the intensification target area; and
- A minimum of 350 new dwelling units per year in the Downtown until 2030, and 500 dwelling units per year after 2030.

It directs the City to achieve these targets by making development in these areas easier, more desirable, and more predictable by enabling and encouraging compatible infill development, leveraging enabling tools[1], and ensuring that lands are planned, zoned, and serviced to facilitate development. While intensification rates in excess of the 50% target are forecasted to continue based on existing development trends, this is not guaranteed. Without continued measures to facilitate it, it is expected that infill will become increasingly more difficult as the City depletes its supply of easier-to-develop sites. It should also be emphasized that rates of intensification are driven largely by shifting market forces outside of the City's control. Ultimately, the City should focus on what it can control, that being to maximize infill development within the limits of trade-offs acceptable to Council. To this end, the above targets are minimums that establish a floor, not a ceiling.

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

[1] Explained in the plan glossary as specific tools designed to assist in the implementation of Complete Communities 2.0, such as zoning, incentives, partnerships, infrastructure investments, and planning.

Tool	Initiative	Description
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 multi-family housing projects that include affordable housing. Council has approved up to $50m of future foregone, with priority given to projects located Downtown and in Winnipeg's five Housing Improvement Zones (HIZs). In 2022, $9.6m was distributed for five projects, while $2.1m was distributed for three projects as of Summer 2023. - The Affordable Housing Opportunities in HIZs program, which offers surplus City-owned lands at discounted rates for affordable housing, continues to operate in 2023. - The Public Service is in its third round of administering the federal Rapid housing Initiative program, having received $11.5m of funding in 2023 to facilitate the development of a minimum of 46 units for vulnerable peoples, located in the central core of the city. - Modest funding opportunities to support the creation of affordable housing in HIZs also exist through the City's Housing Rehabilitation Investment Reserve, which received $1m in the 2023 Budget. In Spring 2023, the City applied for Government of Canada funding through the Canada Mortgage and Housing Corporation's Housing Accelerator Fund, which is intended to get more homes built faster through faster approvals through the promotion of complete and climate-resilient communities and inclusive and affordable housing. The City's application proposed seven initiatives, including rapid zoning by-law and local area plan amendments, incentive programs, and support for infrastructure improvements. Its application proposed increasing the number of housing starts by approximately 5,300 additional units, including 4,200 multifamily units near transit, with potential funding of $192m.

Tool	Initiative	Description
Financial incentives	Tax Increment Financing	The City has approved a number of TIF grants enabling residential and supportive commercial development over the last year: - On May 30, 2023, Council approved a grant to a maximum of $1.4m to enable the redevelopment of a heritage building at 138 Portage Ave E into 146 residential units and commercial space. - The Public Service approved a grant to a maximum of $1m to enable the redevelopment of a surface parking lot at 127 Bannatyne Ave into a mixed use residential and commercial building. Council also approved a TIF grant to a maximum of $1.4m on June 22, 2023, to enable the redevelopment of 325 Broadway into a new hotel.
Infrastructure	Active transportation	In its 2023 Budget, Council allocated $1.89m to the Pedestrian and Cycling Program. This figure compares to a 2018-22 annual average of $3.4m and a planned annual average of $2.3m from 2024-28. It also allocated $3.4m for AT improvements in the budget's regional street renewal projects, including protected bike lanes on Pembina Hwy from McGillivray Blvd to Chevrier Ave, as well as multi-use path improvements along Jubilee Ave. Also of note is that the budget is forecasting $1.1m in 2025 for the functional design for AT grade separation across the CN main line at the Osborne St underpass (and $1.5m for detailed design in 2028).

Tool	Initiative	Description
Infrastructure	Streetscaping and public realm improvements	Streetscaping and public realm improvements are funded from a variety of sources. These initiatives help contribute to an area's desirability. On April 28, 2022, Council approved funding for $10 million for public realm improvements via the COVID-19 Economic Response and Recovery Plan and Downtown Recovery Strategy. In 2023, construction was set to begin on improvements to the area around Thunderbird House, Air Canada Park, Galt Ave, and the Central Park playground. The 2023 Operating and Capital Budgets allocated $128k to the Downtown Enhancement Program; $640k is planned for 2024 to 2028, which compares to $658k over the last five years. Funds were not allocated to the Business Improvement Zones, Image Routes, and Neighbourhood Main Streets Program in 2023; $526k is planned for 2024 to 2028, which compares to $1.21m over the last five years. A number of streetscaping initiatives are underway along Broadway, including improvements to streets, sidewalks, public art, and street furniture and trees, as well as a revitalization of the Broadway fountain.
Infrastructure	Transit improvements	The 2023 Budget allocated $2.2m to provide operational and IT support towards the implementation of the Winnipeg Transit Master Plan (WTMP). Also of note is that it forecasts $20.4m and $7m in 2025-26 for physical improvements to support implementation (e.g. bus loops, stations, traffic priority signals) and the preliminary design of Downtown rapid transit infrastructure respectively. In 2022, roadwork improvements at the Main & Pioneer and Nairn & Watt intersections were completed, while transit amenities such as shelters and bus stop signs will be added in 2023. Both projects are intended to enhance accessibility of existing and future transit service and are key to WTMP implementation. Implementation of the WTMP is a key transportation-related incentive to intensification.

Tool	Initiative	Description
Infrastructure	Wastewater treatment	On September 29, 2023, Council approved a budget of $1.035 billion for the second phase of upgrades to the North End Sewage Treatment Plant, providing improvements to its biosolids treatment facilities. The federal and provincial governments have confirmed funding of a combined total of $368.250 million for this project. The City is seeking additional cost sharing from these levels of governments. These upgrades will support development within both greenfield and infill areas. A Request for Proposal for project design was released in Summer 2023, and is planned to be undertaken in 2024. Construction is planned to begin in 2025. The planned third phase of treatment plant upgrades is currently unfunded at an estimated cost of $810m. However, it is related to nutrient removal and should not be a limiting factor with regards to intensification.
Infrastructure	Water main renewals	In 2022, 9.4 km of water mains were renewed in the intensification target area. Of this work, 8.5km 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)	Work has begun on CentrePlan 2050, a long-term plan for the Downtown that will guide development and public investments to ensure a coordinated approach to revitalization. Public and stakeholder engagement for Phase 1 of the project occurred in June 2023. A consultant has been retained to create urban design guidelines, prepare a streetscape design standards manual, develop a design for a re-imagined Graham Avenue, and develop functional designs for several key planned bike routes conceptually identified in the *Winnipeg Pedestrian & Cycling Strategies*. CentrePlan 2050 is expected to be brought to Council for approval in 2024.

Tool	Initiative	Description
Planning	Glenwood Planned Development Overlay	On January 26, 2023, Council approved a zoning Planned Development Overlay (PDO) for the Glenwood neighbourhood. A PDO is a zoning tool that modifies land uses and/or development standards beyond base zoning rules to achieve local objectives. This PDO implements quantitative standards from the Council-approved *Small-Scale and Low-Rise Residential Development Guidelines for Mature Communities*, improving predictability for all stakeholders in a neighbourhood that is experiencing high rates of infill development.
Planning	Naawi Oodena Area Master Plan	The City of Winnipeg continues to engage with Treaty One Nations on the development of Naawi-Oodena through the Joint Committee established through the Gaawijijigemangit agreement, a Municipal Development & Services Agreement providing a framework for development and the provision of municipal services for the portion of the site that will be designated as an Urban Reserve. These lands comprise approximately two-thirds of the Major Redevelopment Site. The balance of the site will be developed by Canada Lands Corporation and will be administered by a secondary plan, which is expected to be considered by Council in late 2023.
Planning	North and South Point Douglas secondary plan	Work on a Point Douglas secondary plan is expected to begin in Fall 2023. Once complete, the secondary plan will guide land use and transportation investments in anticipation of emerging development interest, driven by its proximity to Downtown, its riverfront, planned rapid transit, and declining viability of industrial uses.
Planning	Water and Wastewater Capacity Study	The Water and Waste Department (WWD) has begun a study to determine how other Canadian cities determine and communicate capacity constraints, and to develop a pilot study for implementation. This study will identify development application process improvements based on a review of existing processes and a scan of comparable jurisdictions. It is intended to be completed in Spring 2024.
Planning	Zoning By-law review	On September 29, 2023, Council received the Zoning By-law Review – Phase 1 report as information. Phase 1 identifies ways the current by-laws work well, or are ineffective/difficult to use, and ways to make the revised documents more user-friendly. It also included an annotated outline of a new zoning by-law and estimated scope of work for Phase 2. The City has proposed to fund Phase 2 under its Housing Accelerator Fund application to Canada Mortgage and Housing Corporation.

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

9.2 Greenfield Development Opportunities and Constraints

The Greenfield Development Opportunities and Constraints table is included in the Appendix of CCDS 2.0. It is intended to help communicate and implement greenfield phasing policies found under Goal 4.0 of its General Growth section by highlighting vital information, including establishing a baseline understanding of anticipated infrastructure investments to guide future decision-making. Sites included in this table have been identified as having at least one constraint to development – constraints that are the responsibility of the City to overcome – such as the need for a precinct plan, a major road, and/or regional water/wastewater infrastructure. Greenfield sites with no identified constraint are considered to be planned and serviced and do not need to be addressed.

As per Policy B1.5.2 (General Growth) of CCDS 2.0, the Public Service is directed to update this table on an annual basis to reflect changing conditions, which may include refined land supply forecasts, changes to infrastructure projects, refined project costs, change in infrastructure priority, and completion of local area planning. In the case of discrepancies found between the version of the table found in CCDS 2.0 and those found in annual land monitoring reports, the most recent report should be referenced for the most accurate source of this information.

Services and infrastructure cited in this table were included to help stakeholders understand the capital budget implications of development, and were selected based on the value they offered in comparing study areas. This table excludes costs expected to be borne relatively equally across new greenfield development, growth-related projects needed regardless of the spatial distribution of growth, and operating costs. Noted infrastructure is divided into two categories: infrastructure that is growth-enabling (i.e. that which is a prerequisite to development), and infrastructure that is growth-supportive (i.e. not a prerequisite to development but is needed to support full build-out of the site). It should be emphasized that the infrastructure included in this table is labeled as “anticipated”; in most cases, additional analysis is needed to confirm these requirements.

Questions guiding this inquiry are described in the table below:

Service	Question	How was the question answered?
Water and wastewater servicing	What regional, City-funded infrastructure related to water and/or wastewater conveyance is required to allow for full build-out of the study area?	Answers were based on review by the Water and Waste Department
Major road projects	Will full build-out of the study area create or enhance pressure to proceed with a planned major road project?	Projects were identified from the *2011 Winnipeg Transportation Master Plan*, with several projects additionally identified whose growth-related needs were subsequently identified by the Public Works Department. Answers were based on VISUM model analysis and future forecast data.
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* (December 2021)
Fire and Paramedic Services	Can sufficient fire coverage be provided to accommodate full build-out of the study area?	Answers were based on GIS analysis and NFPA 1710 response time standards.

Figure 9-2: Questions used to identify anticipated infrastructure

Changes Made

The Public Service's review of the Greenfield Development Opportunities and Constraints table identified the following changes from the version contained in Complete Communities 2.0:

- Project names and authorization years have been changed to align with the most recent City infrastructure planning and budget documents. In the case of Airport Area West, phasing information was added to the project name to reflect the fact that phase 1A is now funded, but additional City investment will be needed to fund future phases.
- Share of East of the Red RecPlex has been added to South Transcona based on the most recent City infrastructure planning and budget documents.
- Shares of Bison Dr extension and Plessis Rd widening have been added to Waverley West B and South Transcona respectively based on preliminary analysis and in anticipation of the expected findings of the new Transportation Master Plan.
- A wastewater interceptor for Fort Whyte has been removed. Updated Water and Waste analysis has established that a connection to the existing Kenaston interceptor to service the study area is expected to be considered a local connection and would be the responsibility of the developer.

- Several major road projects were removed. Updated project scoping has determined that their needs are not being driven by growth-related considerations, and are instead needed for upgrade or renewal reasons. As a result, their needs are independent of the build-out of study areas. These projects are the St Mary's widening, the Osborne St underpass, Louise Bridge replacement, and the Arlington Bridge replacement. The removal of these projects may be re-considered as project scopes may change and/or projects' growth-related components are defined more granularly.
- Previous versions of this Table included a row detailing "Anticipated average City costs per unit" where sites were classified from below-to-above average. This was based on projects and costs accurate as of the time when CCDS 2.0 was being prepared; as a result, this information is now out-of-date. There is a need to refine the methodology used to allocate shares of project costs to growth areas. Until that occurs, this information has been removed.

	Short-to-medium term			
	AA West Residential	**Waverley West B**	**Precinct K South**	**Remainder Precinct Q**
Quadrant	West	Southwest	Southeast	Southwest
Potential Units	4,010	2,990	1,680	2,440
Precinct plan status	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan approved
Sector plan status	-	-	-	-
Precinct plan priority	-	-	-	-
Sector plan priority	-	-	-	-
Servicing priority	1	1	2	4
Anticipated growth enabling infrastructure	• CentrePort South Water and Sewer Servicing Phase 1A (funded) • Water and sewer servicing phases 1B+	• Share of Southwest interceptor (funded)	• Share of Warde Ave extension	• Share of Clement Parkway (Grant to Wilkes)
Anticipated growth supportive infrastructure	• Share of Silver Ave extension	• Share of Facility Optimization – WW (fire) station (funded) • Share of So. Wpg Rec Campus Ph. 1 (funded) • Share of Route 90 improvements – Taylor to Ness (2022) • Share of So. Wpg Rec Campus: Aquatic (2026) • Share of So. Wpg Rec Campus: Arena (2027) • Share of So. Wpg Rec Campus: Library (2028) • Share of Bison Dr extension	• Share of SE Nhbd Rec & Leisure Centre (2028) • Share of SE Wpg Regional Rec & Aquatic Centre (2031) • Share of Marion underpass	None
Site dependencies	None	None	None	Wilkes South sector plan needed before Clement Parkway can be planned as per Council motion Dec. 13, 2017
Land assembly requirement	Some assembly	More assembly	More assembly	More assembly
Primary Transit Network	No planned connection	Planned connection	Planned connection	No planned connection
Decision making guidance	Subdivision and rezoning applications may be submitted following completion of a precinct plan. Build-out may be limited by the need for growth-enabling infrastructure.			

Figure 9-3: Updated Greenfield Development Opportunities and Constraints table, 2023

Short-to-medium term				Long term		
South Transcona	**Fort Whyte**	**Precinct D**	**Precinct B**	**Wilkes South**	**St. Vital Perim. South**	**St. Norbert**
Northeast	Southwest	Northwest	Northwest	Southwest	Southeast	Southwest
4,590	1,370	10,780	3,770	31,470	13,940	20,610
Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required
-	-	-	-	Sector plan required	Sector plan required	Sector plan required
1	1	2	3	4	4	5
-	-	-	-	1	1	2
2	2	3	4	5	5	6
None	• Share of Southwest interceptor (funded)	• Share of Chief Peguis Trail (2027) • Share of wastewater interceptor	• Share of Chief Peguis Trail (2027) • Share of wastewater interceptor	• Share of Clement Parkway (Wilkes to McGillivray) • Share of Clement Parkway (Grant to Wilkes) • Wastewater interceptor • Water feedermain	• Wastewater interceptor • Water feedermain	• Wastewater interceptor • Water feedermain
• Share of East of Red RecPlex (2026) • Share of Schreyer Parkway (2025) • Community/ rec centre • Fire station • Share of Marion underpass	None	• Share of community/rec centre • Share of library • Fire station	• Share of community/rec centre • Share of library	• Community/rec centres • Library • Fire station • Sterling Lyon extension	• Share of SE Wpg Regional Rec & Aquatic Centre (2031) • Share of library • Fire station • Share of Marion underpass	• Share of So. Wpg Rec Campus Ph. 1 (funded) • Share of So. Wpg Rec Campus: Aquatic (2026) • Share of Route 90 improvements – Taylor to Ness (2022) • Library
None	None	Precinct G is first – Chief Peguis Trail and wastewater extended from east.	Precinct D is first – Chief Peguis Trail and wastewater extended from east.	Precinct Q is first – Clement Parkway extended from north.	None	St. Vital Perim. South. is first – wastewater extended from South End treatment plant.
More assembly	Assembled	Some assembly	Some assembly	More assembly	More assembly	Some assembly
Planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	Planned connection
These sites will be the next priorities for precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.				Completion of sector plans are required before precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.		

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

Identified infrastructure projects may be subject to change through refinement of project need.

Potential Future Changes

The following items are being monitored by the Public Service and may result in changes to future versions of the table:

Topic	Implications for	Description
Community/rec centres and libraries	City-wide	On May 26, 2022, Council adopted the *Winnipeg Recreation Strategy* as a long-term strategic plan to guide City of Winnipeg recreation facility investment and service provision. While the Greenfield Opportunities & Constraints Table only considers community/rec centres and libraries, the Recreation Strategy prescribes levels of service for a wider range of facilities, ranging from indoor aquatic centres and arenas to spray pads. Future consideration will be given to the inclusion of additional amenities, relative to the intent of the chart.
Major roads	City-wide	The Public Works Department is currently reviewing its Transportation Master Plan. A new TMP will identify and prioritize major road projects over the plan's time horizon. Its approval may result in changes to projects noted in the table.
Project authorization date	City-wide	The existing table notes years in parentheses next to some infrastructure projects. These refer to the recommended year of detailed design and authorization as per the 2024 Infrastructure Plan, where applicable. These dates will be reviewed with departments over time as part of the Public Service's ongoing prioritization of proposed capital projects.
Wastewater servicing	South Transcona, northeast Winnipeg	The Water and Waste Department is investigating the performance and anticipated increased demands on the Northeast Interceptor (wastewater) through flow monitoring and analysis.

Topic	Implications for	Description
Wastewater servicing	South Transcona	The Northeast Interceptor assessment has identified the Dugald interceptor as a potential constraint to development and may require improvement, depending on the level of development proposed in the preparation of a secondary plan for the area. Analysis and design through the secondary plan process will demonstrate that development can either be accommodate, or it will identify necessary upgrades. Responsibility for cost will be determined once this engineering analysis is completed. The City currently does not have plans to upgrade the Dugald interceptor.
Wastewater servicing	Fort Whyte, Waverley West B, southwest Winnipeg	The Southwest Interceptor is fully funded, with construction planned for 2025 to 2027. Until it is in place, development in these areas may be at risk. Developments will be reviewed on a case-by-case basis, with capacity allocated at the permit stage of approvals. The City's ability to accommodate growth in the interim will depend on the rate of development and growth to-date.
Water and wastewater servicing	Airport Area West Residential & Industrial	Detailed design for phase 1A regional water and sewer is funded and is proceeding in 2023. Phase 1A regional servicing construction is scheduled to begin in 2024. The scope and conceptual timing of future phases is described in the Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering Final Report (see Figures 9-5 and 9-6).

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

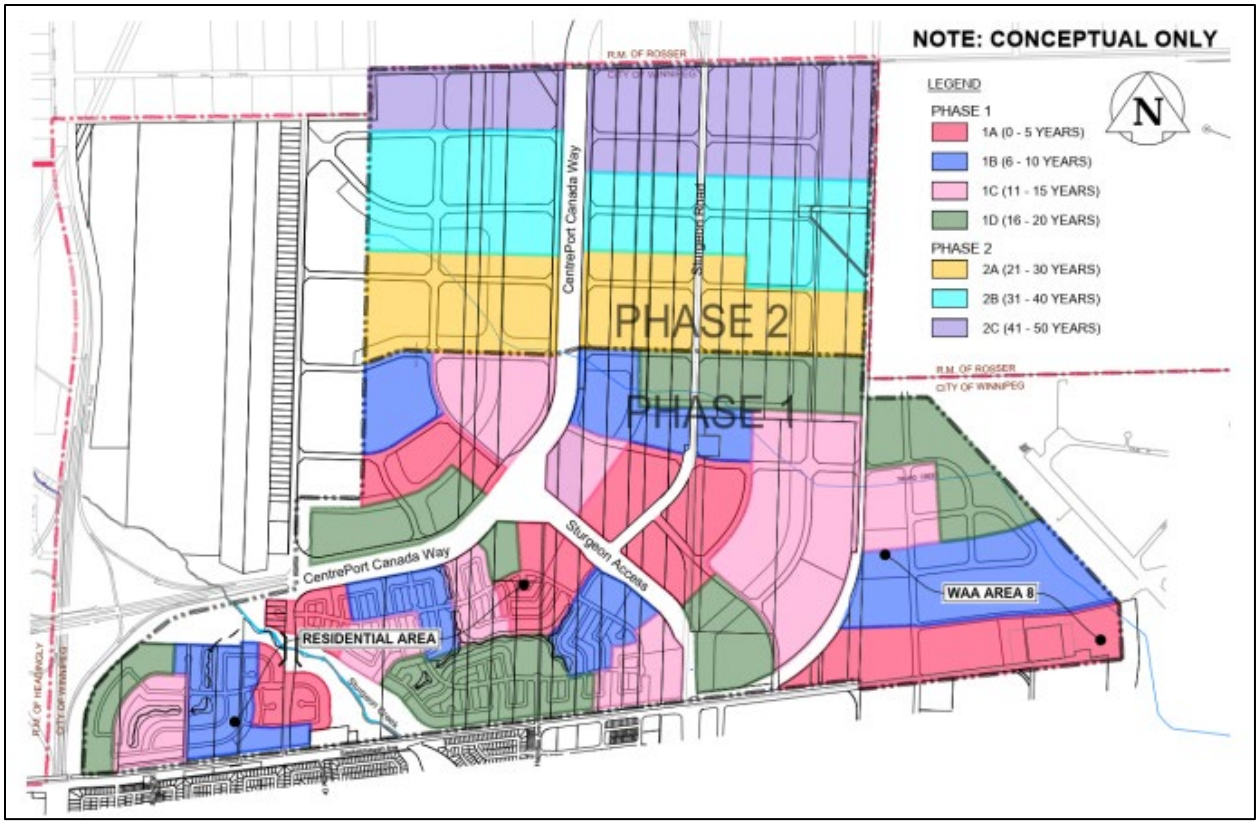

Figure 9-5: Servicing plan map, Airport Area West Regional Water and Wastewater Servicing Preliminary Engineering – Final Report

Phase	Contract	Description	Total costs	% of total
Phase 1A (year 0)	1A	By-pass lift station	$59,980,171	53%
	2A	600mm force main		
	3	Interceptor and intake sewers		
	4A	750mm feeder main (Silver to OS3)		
Phase 1B (year 5)	1B	Lift station sub/superstructure and associated mechanical and electrical to support development for years 6-10	$16,942,753	15%
	5	400m secondary supply main		
Phase 1C (year 10)	1C	Lift station mechanical upgrades to support development for years 11-50	$22,063,642	20%
	2B	750m force main		
Phase 2 (year 20)	4B	750mm feeder main (OS3 to OS4)	$4,724,124	4%
Phase 3 (year 30)	6	Wastewater upgrades to the interceptor sewer	$8,862,980	8%
Total (Class 3) $2020 (excluding inflation)			$112,574,000	100%

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

9.3 Forecasting Growth-Enabling Infrastructure and Plans

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

Recommended project timing reflects estimated timelines for project design and construction a minimum of three years in advance of land supply exhaustion, in accordance with CCDS land supply targets. Where project timing provides for an excess of serviced supply beyond the minimum three years, this is in alignment with *2024 Infrastructure Plan* recommendations. In these cases, residential growth-enabling projects are being driven in part by other reasons, such as CentrePort South servicing and a need for new industrial land. The chart indicates project timing in relation to the City's 6-Year Capital Budget and ten-year Infrastructure Plan, two critical investment planning tools. It is focused on projects needed to enable the development of lands identified as "Short-to-medium term" in CCDS 2.0 greenfield phasing policies; "Long term" land requirements and timing will be refined through future sector planning processes as well as a future review of greenfield phasing policies.

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

City investment planning tools

INFRASTRUCTURE PLAN

SIX-YEAR CAPITAL BUDGET

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

Figure 9-7: Recommended timing of growth-enabling infrastructure from January 1, 2023

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

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

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

Plan	Units[2]	Years supply	Year plan should be adopted by Council
Existing vacant planned	28,360	13.5 years	n/a
South Transcona	4,590	2.2 years	2026
Fort Whyte	1,370	0.7 years	2026
Precinct D	10,780	5.1 years	2029
Precinct B	3,770	1.8 years	2034

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

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

Appendix A: Methodology

A.1 Residential Methodology

A.1.1 History

The Public Service started consistently analyzing development trends and studying greenfield residential land supplies for internal purposes in 2015, which it updated annually from that point. In early 2017, it took its first steps towards formalizing these activities when it issued a contract to Hemson Consulting Ltd. to review its methodology. Hemson concluded that the City of Winnipeg's land supply monitoring methodology is consistent with methodologies applied in other comparable municipalities in Canada. It additionally offered considerations for further refinement, including distinguishing between supplies by dwelling type, and the importance of accounting for levels of municipal servicing to better understand requirements for bringing land to market.

Following third party verification of its work, the Public Service presented its findings to the Urban Development Institute (UDI) in mid-2017, following which it worked together to reconcile each other's data.

By this time, the Public Service had begun its review of *OurWinnipeg* and the *Complete Communities Direction Strategy*. In support of these initiatives, it undertook the *OurWinnipeg Residential Growth Study* to consider how the City can best accommodate forecasted growth over the next 20 years. It culminated in the preparation of site-specific growth area assessments and the evaluation of growth scenarios that directly informed development plan policies. This background study was supported by growth management consultants from IBI Group Professional Services (Canada) Inc, who offered recommendations for implementation, some of which pertained to this land monitoring work, such as:

- Coordinate land use policies and growth scenarios;
- Enhance the City's understanding of infrastructure investments needed to accommodate growth; and
- Establish a monitoring and review process for growth

With the results of the Residential Growth Study in hand, the Public Service was able to draft and advance *Complete Communities 2.0*, which included land supply targets and monitoring and reporting requirements. These policies are described in Section 3.2 of this report.

A.1.2 Description of Methodology

Residential land monitoring activities can be described in four main steps:

Step 1: Compile and compare data

First, all permits are extracted from the City database to January 1 of the current year, after which final permits for the construction of new residential units are sorted from the gross

permit data. Descriptions of these permits are then analyzed to assign a dwelling type consistent with Statistics Canada dwelling type definitions.

Dwelling type	Definition
Single-detached ("singles")	Single family dwelling unattached to any other dwelling with open space on all sides and no dwelling above or below. Considered a ground-oriented dwelling unit.
Semi-detached ("semis")	One of two dwellings attached side-by-side or back-to-back to each other with no dwellings above or below it. Together, the two units have open space on all sides. Considered a ground-oriented dwelling unit.
Rowhouse ("rows")	Three or more dwellings joined side-by-side or back-to-back, but not having any other dwellings above or below. Considered a ground-oriented dwelling unit.
Apartments	Dwelling units in a form other than what is described, including everything from an up-down duplex to a high-rise apartment.
Note: Secondary suites are excluded from these definitions	

Figure A-1: Dwelling type definitions used in this report

Once this dataset is established, development activity can be analyzed in accordance with the analyses provided in this report, including new residential units by Urban Structure and by intensification target.

It is important to note that, in the development of this dataset, "residential units" refer to principal dwellings. Institutional/commercial residences such as care homes, university residences, and hotels are excluded from these figures. Secondary suites, as accessory not primary dwellings, are also captured separately.

Step 2: Update projected greenfield land supply

The first step in updating projected greenfield land supply entails developing or updating a forecast for every individual site using the best information available. Where applicable, approved building permits are the best source of information, followed by plans of subdivision, most notably subdivision and rezoning applications (DASZs), but also short-form subdivisions (DASSFs). Where DASZs have not yet been approved, secondary plans or Council-endorsed non-statutory area master plans would be the next best source of information. Where planning has yet to occur, an average residential density is applied based on the projected densities of active mid-build out greenfield sites.

The above forms the rationale for projecting the total number of single-detached, semi-detached, rowhouses, and apartment dwelling units in a given site. Where the building permits have been issued by the City prescribing number of dwelling units and dwelling types, this is the most reliable basis for estimating the units that will be developed. In the absence of this information, assumptions must be made based on parcel zoning as prescribed by a DASZ.

It is assumed that properties zoned “RMF-L”, “RMF-M”, and “RMU” as per Zoning By-law No. 200/06 will build out as apartments, properties zoned “RMF-S” will build out as rowhouses, properties zoned “R2” will build out as semi-detached dwellings, and “R1” properties as single-detached dwellings, all of which would build out to the densities described in Figure A-2 and in accordance with two different supply scenarios further described below. These are derived from an analysis of average dwelling type densities in greenfield areas. Where the site has not been subdivided and rezoned, dwelling types are projected to these densities based on local area plan policies. Where there is no Council-approved secondary plan or non-statutory area master plan, an average mix of dwelling types and densities are applied at a site level based on averages from existing developing areas.

Zoning	Dwelling type	Density (units per net acre)	
		Standard	Alt. higher
RMF-L and RMU	Apartments	38	54.5
RMF-M	Apartments	37.5	46
RMF-S	Rows	17.5 or 23*	17.5 or 23
R2	Semis	14	14
R1	Singles	7.3	7.3
* - “Block-oriented” rowhouse sites are projected to 17.5 units per net acre, while “site-oriented rowhouse sites are projected to 23 units per net acre.			

Figure A-2: Density assumptions by dwelling type

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

This describes a generalized approach to forecasting based on average assumptions. However, consultation with a site’s development interests can reveal plans that may deviate from this generalized approach. As a result, it was necessary to develop consistent

parameters to inform when deviations can be considered that would allow for accurate forecasting while still providing methodological transparency.

- First, this methodology will only consider a deviation informed by a site's development interests once an urban subdivision and zoning is in place. Development plans can be subject to change; this methodology will not adjust its approach until alternative plans have been committed to via a Council-approved subdivision and rezoning application. Once this is in place, this methodology will consider, for example, increasing forecasted single family densities or allocating alternative dwelling types relative to a site's zoning as per the developer's suggestion.
- Relatedly, this methodology will not presuppose future rezonings. For example, it will not allocate dwelling units to a commercial-zoned property, even if the developer indicates an intention to make a future application. It will only make such an adjustment after Council approval.
- Prior to Council approval of an urban subdivision, it will apply an average greenfield density. However, it will instead consider applying an average mix of ground-oriented units if there is a rationale warranting it. For example, this would be the case if both the developer and Public Service agree there are servicing constraints limiting typical greenfield apartment development.
- While it will not entertain deviations from its standard methodology that do not follow the above parameters, it nonetheless recognizes the value of such developer commentary. The Public Service will endeavour to capture this commentary in this report, even if it does not alter the nature of its forecasts.

An important part of forecasting supply entails refining the developable area. First, not all residential-designated lands can be developed for residential purposes. For example, land is needed for public rights-of-way, laneways, parks and open spaces, school sites, and local commercial uses. To account for this, a conversion rate of 0.5 is applied to gross residential land to reflect the net developable area. For example, it is assumed that 50 acres of a 100 gross acre site could be developed for residential uses, with the additional 50 acres being occupied by parks, roads, and other uses. The uses accounted for in this gross-to-net conversion are found in most greenfield developments and typically occur at the same general frequency. A 0.5 conversion rate may be low for other jurisdictions but is appropriate for the local context given larger requirements for land drainage ponds.

Second, in addition to the common land uses accounted for in the gross-to-net conversion, there may be additional lands that are undevelopable or are unlikely to develop to urban uses whose occurrences are more unique to the specific site. These lands can include hydro right-of-ways and substations, land identified for future highway interchanges, and lands occupied by existing dwellings. Land areas associated with these uses are subtracted from the site's gross land area. Regarding lands occupied by existing dwellings, pockets of existing rural residential development are typically identified as undevelopable, even if there may be opportunities for the subdivision of existing larger lots when the wider area develops to urban densities, as this development would occur more sporadically more akin to infill development, and is therefore a less reliable source of land supply.

Once a site's total potential supply is determined, previous development activity is subtracted to arrive at a forecast of remaining units. The sum total of potential remaining units for all sites comprises the Standard supply scenario. An Alternative Higher supply scenario is also prepared to consider the land supply implications of a market shift towards higher densities. More specifically, it assumes that a) 15% of remaining available single family dwellings are instead developed as a mix of semi-detached and rowhouse dwellings[1], and b) higher apartment densities in accordance with Figure A-2.

Step 3: Update projected greenfield land demand

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

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

Step 4: Forecast years of supply

Finally, years supply is determined by dividing the total supply by forecasted annual greenfield absorption. This report's years supply findings are based on a) the primary supply forecast, and b) a 50% greenfield demand scenario. However, alternative findings were also prepared based on the alternative supply forecast as well as 60% and 40% demand scenarios to allow the City to understand the implications of changing market conditions.

A.2 Non-Residential Methodology

A.2.1 History

In comparison with its residential work, the Public Service has spent fewer years monitoring non-residential development trends, analyzing industrial and commercial land supplies for

[1] 58% of this land area would instead be developed as semi-detached dwellings, while 42% would be developed as rowhouses. This is based on the proportion of "R2"-zoned land to "RMF-S"-zoned land in sampled greenfield areas.

fewer years, and refining its methodologies. Its non-residential monitoring activities trace back to the *2018 Employment and Commercial Lands Study* (ECLS) that was prepared as a background study to the OurWinnipeg/Complete Communities review process and provided to Council in 2019. The study's main findings were as follows:

- The City faces a large shortfall of vacant serviced employment lands to accommodate forecasted growth over the next 20 years;
- City competitiveness is being compromised by the fact that serviced industrial lands are not sufficiently being brought on-stream and that there is no clear vision or strategy to do so;
- Capital Region municipalities are becoming increasingly competitive relative to the City; and
- There is more than enough vacant commercial land to accommodate forecasted growth over the next 20 years.

The study recommended that the City develop a system for tracking and monitoring employment and commercial land needs building off the baseline 2011 to 2016 data and methodology of the study. This recommendation aligned with the City's expectations prescribed in the scope of work, which requested that the study provide it with the means of monitoring its employment land supply on an on-going basis.

In May 2022, Council gave third reading to *Complete Communities 2.0*, which includes new policies related to non-residential land supplies. These policies are summarized in Section 3.2 of this report.

A.2.2 Description of Methodology

The following section describes non-residential monitoring activities, beginning first with an analysis of non-residential development trends before breaking off into industrial and commercial analyses of land supply and forecasted demand.

Step 1: Compare and compile data

It is important to establish a baseline understanding of development trends before forecasting land needs. First, all permits for the construction of non-residential development entailing new or expanding floor area are extracted from gross permit data from the City's database to January 1 of the current year.

Once this is established, new fields are added to the dataset to facilitate analysis, including job type, an assessment of whether the new development is an addition to an existing building or the construction of a new one, an assessment of whether the new development is occurring on vacant land (absorption) or is an intensification of a previously-developed site, the estimated number of jobs represented by the development, and its geographic location,

including its location within Employment Land designations, City quadrants, and Employment and Commercial Lands Study clusters.

More specifically, non-residential construction is assigned one of the following job categories below based on the permit's description. Figure A-5 provides a brief description, including industry examples.

Category	Includes:
Education	Includes schools, universities, and colleges
Industrial	Manufacturing uses
Office	Purpose-built primary office uses. Does not include office uses accessory to another use such as an industrial or warehouse use
Retail	Retail uses, including car dealerships, gas stations, commercial retail units, banks, restaurants, hotels, and car washes
Service	Includes public and private institutional and recreational uses, such as libraries, day cares, indoor playgrounds, community centres, places of worship, hospitals and medical clinics, museums and art galleries, airport, assisted living facilities, and golf clubs.
Warehouse	Warehouse uses, including self-storage facilities

Figure A-5: Job type descriptions and examples

In order to better understand differences between these categories, Figure A-6 below describes how these employment categories relate to the North American Industry Classification System (NAICS) 20 industry classification system:

NAICS 20	Ind	War	Ret	Off	Edu	Ser
11 Agriculture, forestry, fishing, and hunting						
21 Mining, quarrying, and oil and gas extraction						
22 Utilities	1					
23 Construction	0.5	0.5				
31-33 Manufacturing	1					
41 Wholesale trade		1				
44-45 Retail trade			1			
48-49 Transportation and warehousing		1				
51 Information and cultural industries				1		
52 Finance and insurance				1		
53 Real estate and rental and leasing				1		
54 Professional, scientific, and technical services				1		
55 Management of companies and enterprises				1		
56 Administrative and support, waste management and remediation services				1		
61 Educational services					1	
62 Health care and social assistance						1
71 Arts, entertainment, and recreation						1
72 Accommodation and food services						1
81 Other services (except public administration)						1
91 Public administration				1		

Figure A-6: Job categories in relation to the NAICS 20 classification system

In estimating the number of jobs represented by the non-residential construction, the following jobs per floorspace assumptions were used[1] (requiring permits to be sorted by this category as well):

Category	Floor area per job
Industrial/warehousing	1,076 sq. ft.
Institutional	700 sq. ft.
Non-office commercial	431 sq. ft.
Office	291 sq. ft.

Figure A-7: Jobs per floor area assumptions

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

Step 2: Update industrial supply

Updating the City's industrial land supply consists of a number of steps. This methodology is based on what was used in the 2018 ECLS.

First, the inventory of vacant industrial-zoned land from the previous year is reviewed. Newly-created and newly-vacated properties are added, while parcels having undergone development in the previous year are removed. Vacant sites that are integrated into the operations of adjacent parcels are removed from the inventory; evidence of integration may include accessory uses such as vehicular parking, outdoor storage, or employee amenity spaces, as well as fencing inclusive of multiple properties. Common property ownership may also be used to gauge this.

From there, parcel zoning and their servicing status as either estimated locally serviced (i.e. "shovel-ready") or unserviced is reviewed, the latter of which is based on proximity to local water and sewer mains and lot configuration. The 2018 ECLS emphasized the importance of this distinction, noting that, "vacant serviced industrial lands are generally smaller in size", while "vacant unserviced industrial lands… are found in areas that have access issues, require extensive and costly infrastructure service runs, cannot be serviced in a cost-effective manner, are rearage lands requiring access and servicing through private lands, or some combination of the above". It also notes that unserviced areas, "typically cannot be serviced and brought on-stream in a cost-effective manner by a developer", and that the City may have to plan a more active role in bringing these lands on-stream (p. 6-10 to 6-11). While more recent private sector-led development suggests this may be less the case than when the study was drafted, the City may still not be in a position to take private sector-led local servicing of industrial lands for granted. As a result, this distinction should be reflected in the interpretation of land supply results.

At this point, two additional analyses are undertaken beyond what was done in the ELS to provide a more nuanced understanding of the City's industrial land supply. First, each parcel in the inventory is analyzed against the list of potential encumbrances in Figure A-8 below that may limit their developability. Sites without any noted encumbrances are recognized as "unencumbered" in the industrial supply summary. While the 2018 ECLS addressed this issue of undesirability by discounting 15% of the City's supply, it was felt that this approach was more accurate.

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

The Public Service also added an analysis quantifying the further developability of underdeveloped sites. It did this by first screening all occupied industrial-zoned properties with a minimum lot area of two acres that include unoccupied portions greater than one acre in area that are potentially developable. These portions must be entirely unused (i.e. they are not being used for accessory uses such as parking or outdoor storage) and must be of a developable configuration, including a conceivable means of access. Sites identified as vacant supply, or portions thereof, cannot be identified for potential intensification. Polygons are then traced over the 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. As per the City's Standards and Guidelines for the Mitigation of Methane Gas at Building and Utilities and Guidelines for Construction on on Landfill Sites, while development is not precluded in landfill control zones, higher building and development standards are required that may render development uneconomical.

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.

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.