VACANT URBAN RESIDENTIAL LAND SURVEY
2010 UPDATE

1. INTRODUCTION

The Vacant Urban Residential Land Survey (VURLS) has, since 1982, monitored the supply of vacant land in Ottawa's urban area to assess whether it meets the policies of the Official Plan and the Provincial Policy Statement[1].

2. HIGHLIGHTS

- The inventoried supply of vacant urban residential land and its unit potential stood at 2,301 net hectares (ha) and approximately 96,859 units at the end of 2010, compared to 2,327 ha and 94,070 units in December 2009. This is sufficient for approximately 18 years based on projected demand, significantly more than the 10-year requirement of the Provincial Policy Statement (PPS). This does not include additional urban land required to be added by the June 2011 OMB decision.

- The supply of registered and draft approved vacant land with servicing in 2010 (647 ha) represents a 5.4 year supply based on projected demand. This is virtually unchanged from 2009 (652 ha), and exceeds the PPS requirement for a three year supply of serviced registered and draft approved lots.

- Total serviced land supply is sufficient for 12 years. By area, serviced land supply is: Inside the Greenbelt 8.8 years; Kanata-Stittsville 9.4 years; South Nepean 7.9 years; Riverside South 23.6 years; Leitrim 21.9 years; and Orléans 12.4 years.

- Consumption of urban residential land totalled 116 net ha in 2010, down from 126 ha in 2009 (Figure 1), and below the five year average of 135 ha. Dwellings built on this land totalled 4,422 units, little changed from 4,427 in 2009 (Figure 2).

- The average density of housing built on land surveyed in 2010, at 38.3 units per net ha, is the highest ever recorded by the survey. However, after five years of steady increase, the density of single-detached houses declined slightly from 23.0 units/net ha in 2009 to 22.8 in 2010.

- Vacant land supply shares by area:
  - Kanata-Stittsville 35%
  - Riverside South 21%
  - South Nepean 17%
  - Orléans 16%
  - Leitrim 6%
  - Inside the Greenbelt 5%

[1] Note: A detailed parcel list and accompanying map are also available showing unit potential, approval status and other information for each parcel. Contact City Client Service Centre at 580-2400 for copies.

- The ten largest landowners held 63.4 percent of the residential land supply in 2010, down from 64.4% in 2009. Major owners were Richcraft (12.8%), Urbandale (10.2%), Minto (9.5%), Mattamy (6.2%), KNL (5.1%), Claridge (4.9%), CRT Developments (3.9%), Ashcroft (3.8%), Taggart-Tamarack (3.6%), and Tartan (3.4%). If partnerships are considered, Richcraft and Urbandale together accounted for about 28% of the land supply.

The Annex to this report presents the supply, development potential and planned density of development of vacant urban residential land inside and outside the Greenbelt.

Figure 1
Land Consumption, 1983-2010

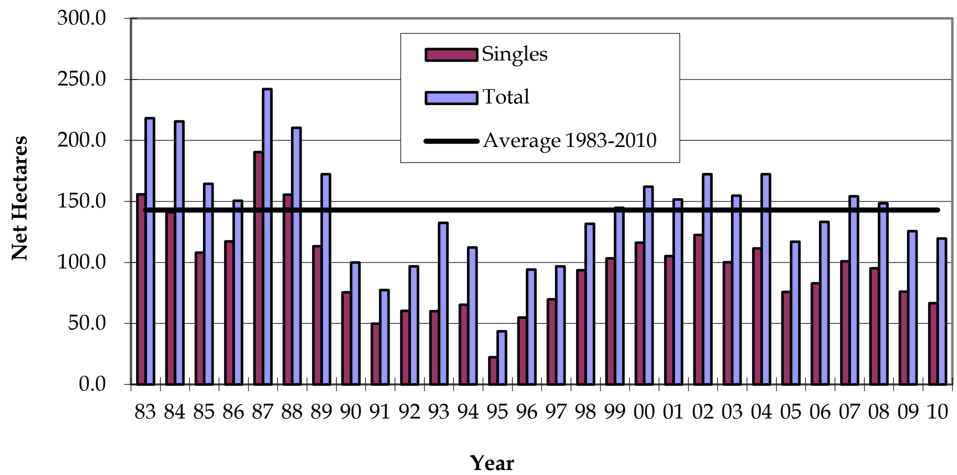
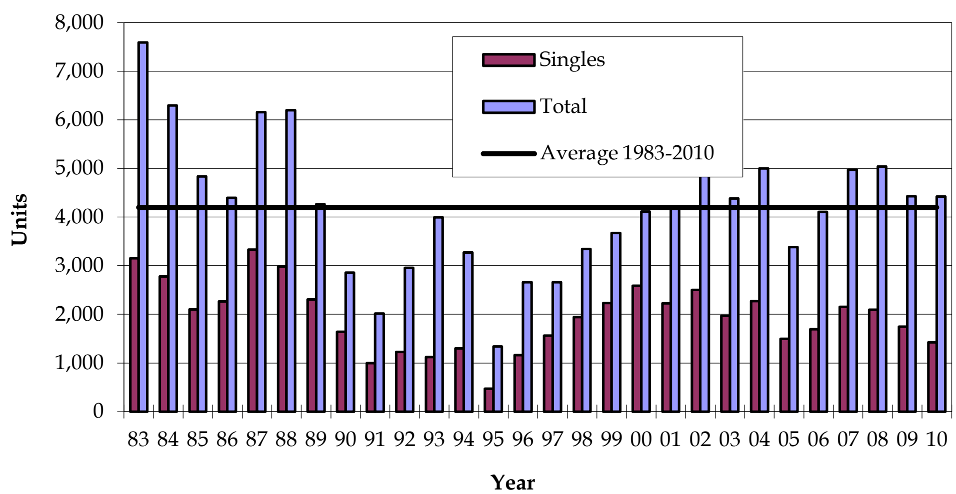


Figure 2
Unit Construction, 1983-2010



3. PURPOSE OF THE SURVEY

This report describes the vacant urban residential land supply in Ottawa and the estimated number of dwelling units that can be developed on it. The purpose of the survey is to:

- Monitor the supply of vacant urban residential land for primarily "greenfield" development on an annual basis;
- Monitor the consumption of land and built densities by unit type and sub-area;
- Estimate unit potential by housing type and density on vacant land in the near and medium term;
- Compare the supply of residential land with future demand;
- Assess total supply and serviced registered and draft approved supply against the Provincial Policy Statement; and
- Monitor land ownership patterns by area.

4. METHODOLOGY

Lands surveyed are those designated "Urban Area" on Schedule A of the Official Plan, including amendments approved by Council up to December 2010. Lands considered to have development potential are those parcels of vacant residential[1] land greater than 0.8 net hectares in size. Smaller parcels are included if they are remnants of subdivisions included in previous years' surveys.

Estimates of development potential generally do not include units that might be created by various forms of residential intensification, but those intensification sites that meet the criteria for inclusion in the survey are included (e.g. all development inside the Greenbelt is some form of intensification). Intensification activity is reported comprehensively in the Annual Development Report based on building permit issuances.

Land parcels in the survey are described by the following variables:

- Parcel size in net hectares (ha) to the nearest 0.01 ha (1 ha = 2.47 acres);
- Unit potential by structure type, where known;
- Average density in units/net ha. Net refers to land in exclusively for residential use (i.e. building lots), including lanes and parking areas internal to developments but excluding public streets, rights-of-way and all non-residential uses;
- Planning status of subdivisions (registered, draft approved, etc);
- Ownership, based on assessment data; and
- Planning sub-area (South Nepean, Orléans, etc).

Land parcels defined on the basis of ownership are the basic units of observation. Within each parcel, land is categorized according to subdivision approval status. Field surveys, municipal records, plans of subdivision and condominium, the Official Plan, Community Design Plans, zoning, site plans, assessment data, and land registry records are all used to compile the inventory of parcels and their characteristics.

[1] Vacant residential land in this survey includes lands approved for residential development based on the most detailed, approved planning document for the subject parcel. In order of detail, from the most specific to the most general, planning approvals range from site plans, plans of subdivision and condominium, the zoning by-law, Community Design Plans and the Ottawa Official Plan.

Housing unit types are defined as follows:

> Single-detached: A single dwelling unit not attached to any other building;
> Semi-detached: One of two dwelling units attached to a single neighbouring unit by a vertical common wall;
> Townhouse: One of three or more dwelling units joined side by side without having any other dwellings above or below;
> Stacked Townhouse: A building with six or more units attached side by side, two units high; and
> Apartment: One of two or more dwelling units attached vertically and horizontally, typically with shared external access, including duplexes.

5. ANALYSIS

5.1 Land Demand

Land Consumption Trends

Residential land consumption decreased in 2010 for the third year in a row (Table 1 and Figure 1), dropping 8% from 125.5 net ha in 2009 to 115.6 ha in 2010. This was well below the five-year average of 135 ha. Singles accounted for 63 ha or 54% of land consumed in 2010, down from 61% in 2009. Land used for semi-detached units increased to 7.8 ha, a 6.7% share, while townhouses consumed 32.5% in 2010, up slightly from 2009. Land used for stacked townhouses increased to 4.6 ha (4%). Land developed for apartments more than doubled from 2009 to 3.0 ha (2.6%) in 2010.

Table 1. Vacant Urban Residential Land Consumption, 2004-2010 (net ha)

	Year							
Unit Type	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**Avg. 2006-2010**
Single-detached	111.5	75.7	82.7	100.8	95.1	76.1	62.7	83.5
Semi-detached	10.3	6.7	9.2	6.9	4.1	5.7	7.8	6.7
Townhouse	47.1	32.6	35.3	41.8	41.7	39.5	37.5	39.2
Stacked Townhouse	2.6	1.3	4.6	3.4	6.1	2.9	4.6	4.3
Apartment	0.9	0.7	1.2	1.2	1.5	1.4	3.0	1.6
Total	**172.3**	**117.0**	**133.1**	**154.1**	**148.5**	**125.5**	**115.6**	**135.3**

Table 2. Housing Starts on Vacant Urban Residential Land, 2004-2010

	Year							
Unit Type	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**Avg. 2006-2010**
Single-detached	2,272	1,496	1,695	2,151	2,097	1,749	1,426	1,824
Semi-detached	306	224	310	220	122	176	260	218
Townhouse	2,004	1,319	1,478	1,911	1,798	1,753	1,631	1,714
Stacked Townhouse	240	198	512	450	776	363	485	517
Apartments	180	145	113	242	246	386	620	321
Total	**5,002**	**3,382**	**4,108**	**4,974**	**5,039**	**4,427**	**4,422**	**4,594**

Source: CMHC

The single-detached share of housing starts on VURLS land fell from 40% in 2009 to 32% in 2010, and townhouses dropped from 40% to 37%. Shares of other unit types increased; semi-detached from 4% to 6%, stacked townhouses from 8% to 11%, and apartments from 9% to 14%.

Table 3a shows the distribution of land developed in 2010, with 5% Inside Greenbelt and 95% in outer areas. Kanata-Stittsville, Riverside South and Leitrim increased shares of land developed, while other areas decreased. Kanata-Stittsville led all areas in land consumption with a 33% share, followed by South Nepean (27%) and Orléans (23%). Riverside South and Leitrim had the smallest shares among areas outside the Greenbelt.

Between 2009 and 2010, the number of units built on land covered by the survey increased in Kanata-Stittsville, South Nepean, Riverside South and Leitrim while falling in Orleans and Inside Greenbelt (Table 3b). Kanata-Stittsville averaged the highest annual number of units built over the past five years (1,349), followed by South Nepean (1,222) and Orléans (988). Leitrim has averaged the fewest units.

Table 3a

Vacant Land Developed by Area, 2004-2010 (net ha)

Area	2004	2005	2006	2007	2008	2009	2010	5-Year Avg. 2006-2010
Inside Greenbelt	16.0	11.1	15.0	16.6	9.3	7.8	5.6	10.8
% of Total	*9.3%*	*9.5%*	*11.3%*	*10.8%*	*6.2%*	*6.2%*	*4.8%*	*8.0%*
Kanata-Stittsville	45.2	34.2	39.1	49.2	54.5	36.2	38.6	43.5
% of Total	*26.2%*	*29.2%*	*29.4%*	*32.0%*	*36.7%*	*28.8%*	*33.4%*	*32.1%*
South Nepean	44.0	30.1	36.1	38.1	38.9	38.6	30.7	36.5
% of Total	*25.5%*	*25.8%*	*27.2%*	*24.7%*	*26.2%*	*30.8%*	*26.6%*	*27.0%*
Riverside South	13.5	8.3	9.2	9.9	8.4	5.2	5.9	7.7
% of Total	*7.8%*	*7.1%*	*6.9%*	*6.5%*	*5.6%*	*4.2%*	*5.1%*	*5.7%*
Leitrim	7.3	5.5	5.5	5.5	3.7	7.9	8.8	6.3
% of Total	*4.2%*	*4.7%*	*4.2%*	*3.6%*	*2.5%*	*6.3%*	*7.6%*	*4.6%*
Orléans	46.3	27.7	28.1	34.7	33.8	29.9	26.0	30.5
% of Total	*26.9%*	*23.7%*	*21.1%*	*22.5%*	*22.8%*	*23.8%*	*22.5%*	*22.5%*
Total	**172.3**	**117.0**	**133.1**	**154.1**	**148.5**	**125.5**	**115.6**	**135.3**
Total %	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***

Table 3b

Housing Starts by Area, 2004-2010 (net ha)

Area	2004	2005	2006	2007	2008	2009	2010	5-Year Avg. 2006-2010
Inside Greenbelt	774	489	568	918	596	564	400	609
% of Total	*15.5%*	*14.5%*	*13.8%*	*18.5%*	*11.8%*	*12.7%*	*9.0%*	*13.3%*
Kanata-Stittsville	1,153	765	1,060	1,474	1,790	1,108	1,313	1,349
% of Total	*23.1%*	*22.6%*	*25.8%*	*29.6%*	*35.5%*	*25.0%*	*29.7%*	*29.4%*
South Nepean	1,168	893	1,154	1,068	1,215	1,329	1,344	1,222
% of Total	*23.4%*	*26.4%*	*28.1%*	*21.5%*	*24.1%*	*30.0%*	*30.4%*	*26.6%*
Riverside South	330	224	279	290	314	155	168	241
% of Total	*6.6%*	*6.6%*	*6.8%*	*5.8%*	*6.2%*	*3.5%*	*3.8%*	*5.3%*
Leitrim	195	134	134	151	83	264	289	184
% of Total	*3.9%*	*4.0%*	*3.3%*	*3.0%*	*1.6%*	*6.0%*	*6.5%*	*4.0%*
Orléans	1,382	877	913	1,073	1,041	1,007	908	988
% of Total	*27.6%*	*25.9%*	*22.2%*	*21.6%*	*20.7%*	*22.7%*	*20.5%*	*21.5%*
Total	**5,002**	**3,382**	**4,108**	**4,974**	**5,039**	**4,427**	**4,422**	**4,594**
Total %	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***

Source: CMHC

Note: Percentages in Tables 3a and 3b may not add due to rounding.

Densities

The average net density[1] of development since 2004 has ranged between 29.0 and 38.3 units per net ha (Table 4). The 38.3 units/ha reached in 2010 was the highest average density recorded since monitoring began in 1983, continuing the trend of rising densities seen over the past several years.

Table 4								
	Built Densities on VURLS Parcels, 2004-2010 (units per net hectare)							
Unit Type	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**5-Year Weighted Average* 2006-2010**
Single-detached	20.4	19.8	20.5	21.3	22.1	23.0	22.8	21.9
Semi-detached	29.9	33.4	33.6	32.1	30.1	30.9	33.3	32.3
Townhouse	42.6	40.5	41.9	45.8	43.1	44.4	43.5	43.8
Stacked Townhouse	93.4	157.1	110.3	130.8	127.4	127.4	105.0	119.5
Apartment	209.3	219.7	98.3	198.4	162.9	275.7	210.2	195.3
Weighted Average	**29.0**	**28.9**	**30.9**	**32.3**	**33.9**	**35.3**	**38.3**	**33.9**

* Weighting divided the sum of units built by the sum of hectares developed

The breakdown of annual development density by area and unit type is provided in Tables 5 to 8 for the 2004 to 2010 period.

Table 5								
Single-Detached Development Densities, 2004-2010 (units per net hectare)								
Area	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**5-Year Average 2006-2010**
Inside Greenbelt	21.7	21.3	21.9	21.5	21.0	21.4	20.5	21.5
Kanata-Stittsville	18.6	18.5	19.3	22.6	22.9	21.8	20.5	21.6
South Nepean	21.3	19.6	21.3	19.9	22.2	24.9	25.2	22.5
Riverside South	20.3	19.4	19.1	20.5	22.0	22.9	21.8	21.2
Leitrim	18.7	17.2	17.6	17.3	17.8	19.8	21.7	19.2
Orléans	21.4	22.0	21.5	21.9	21.4	22.6	23.8	22.1
Weighted Average	**20.4**	**19.8**	**20.5**	**21.3**	**22.1**	**23.0**	**22.8**	**21.9**

The average density of single-detached decreased slightly to 22.8 units/net ha in 2010 (Table 5) but remained above the five-year average of 21.9 u/ha. Densities decreased in Inside Greenbelt, Kanata-Stittsville and Riverside South, and increased in South Nepean, Leitrim and Orléans. Leitrim had the lowest density at 21.7 u/ha, and South Nepean the highest (25.2 u/ha).

In 2010, semi-detached units developed at an average of 33.3 units/ha, an increase from 2009 (30.9 u/ha), and above the five-year average of 32.3 u/ha (Table 6a).

[1] Net residential density is based on the area of land in exclusively residential use (i.e. the building lots), including lanes and parking areas internal to developments but excluding public streets, rights-of-way and all non-residential uses.

Table 6a								
Semi-Detached Development Densities, 2004-2010 (units per net hectare)								
Area	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**5-Year Average 2006-2010**
Inside Greenbelt	36.1	32.4	38.3	35.6	28.3	24.0	27.5	32.6
Kanata-Stittsville	25.0	25.3	24.7	30.6	30.8	28.8	31.3	28.9
South Nepean	34.7	41.3	32.6	21.3	20.0	35.7	38.1	33.0
Riverside South	21.9	39.2	41.0	36.8	0.0	0.0	33.3	39.7
Leitrim	40.3	33.6	38.5	36.5	37.5	35.4	34.4	35.7
Orléans	25.1	29.8	34.8	32.2	42.9	30.0	27.3	31.1
Weighted Average	**29.9**	**33.4**	**33.7**	**32.1**	**30.1**	**30.9**	**33.3**	**32.3**

The density of townhouses in 2010 (Table 6b) fell from 44.4 u/ha in 2009 to 43.5 u/ha. Densities declined in all areas except South Nepean and Orléans.

Table 6b								
Townhouse Development Densities, 2004-2010 (units per net hectare)								
Area	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**5-Year Average 2006-2010**
Inside Greenbelt	60.5	50.1	46.1	61.0	58.6	47.2	45.1	53.3
Kanata-Stittsville	40.4	31.7	42.8	43.0	41.8	41.0	39.8	41.5
South Nepean	39.7	44.9	39.5	42.4	43.0	47.9	48.5	44.2
Riverside South	39.4	46.2	36.3	42.0	40.8	43.4	42.0	40.7
Leitrim	43.1	42.3	38.5	41.5	34.8	47.5	43.6	42.8
Orléans	38.2	41.2	43.2	45.3	41.6	45.1	45.4	44.2
Weighted Average	**42.6**	**40.5**	**41.9**	**45.8**	**43.1**	**44.4**	**43.5**	**43.8**

Stacked townhouse densities dropped to 105.0 u/ha in 2010 (Table 6c). Since the number of stacked townhouses built on VURLS parcels is relatively small, individual projects typically produce substantial annual variations.

Table 6c								
Stacked Townhouse Development Densities, 2004-2010 (units per net hectare)								
Area	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**5-Year Average 2006-2010**
Inside Greenbelt	36.4	n/a	200.0	119.6	151.2	133.3	102.0	133.3
Kanata-Stittsville	80.0	n/a	78.8	114.3	121.5	94.7	87.1	99.3
South Nepean	126.3	146.1	113.2	164.6	120.7	136.0	107.5	123.0
Riverside South	n/a	n/a	104.0	0.0	91.5	155.6	76.9	96.5
Leitrim	n/a	n/a	0.0	0.0	171.4	150.0	109.1	129.4
Orléans	137.1	183.8	125.4	135.9	116.7	94.6	144.7	123.4
Weighted Average	**93.4**	**157.1**	**110.3**	**130.8**	**127.4**	**127.4**	**105.0**	**119.5**

Apartment densities (Table 7) averaged 210.2 units/ha, down from 2009 but above the five-year average of 195.3 u/ha. As with townhouses, apartments can have substantial changes in density from year-to-year.

Table 7

Apartment Development Densities, 2004-2010 (units per net hectare)

Area	2004	2005	2006	2007	2008	2009	2010	5-Year Average 2006-2010
Inside Greenbelt	355.6	219.7	98.3	198.4	0.0	449.2	455.3	238.7
Kanata-Stittsville	n/a	n/a	0.0	0.0	369.4	0.0	317.4	340.2
South Nepean	n/a	n/a	0.0	0.0	0.0	0.0	142.7	142.7
Riverside South	n/a	n/a	0.0	0.0	0.0	0.0	0.0	0.0
Leitrim	n/a	n/a	0.0	0.0	0.0	0.0	0.0	0.0
Orléans	104.0	n/a	0.0	0.0	98.3	141.8	0.0	116.0
Weighted Average	**209.3**	**219.7**	**98.3**	**198.4**	**162.9**	**275.7**	**210.2**	**195.3**

Overall density increased in all areas except Inside Greenbelt, Riverside South and Leitrim (Table 8). Built density has increased an average of 1.9 u/ha annually since 2006.

Table 8

Total Development Densities (all unit types), 2004-2010 (units per net hectare)

Area	2004	2005	2006	2007	2008	2009	2010	5-Year Average 2006-2010
Inside Greenbelt	48.3	44.0	37.8	55.4	64.3	72.7	71.8	56.2
Kanata-Stittsville	25.5	22.4	27.1	29.9	32.9	30.6	34.0	31.0
South Nepean	26.6	29.6	31.9	28.0	31.2	34.4	43.8	33.5
Riverside South	24.5	26.9	30.5	29.2	37.5	29.6	28.6	31.3
Leitrim	26.7	24.5	24.2	27.4	22.6	33.6	32.7	29.3
Orléans	29.8	31.6	32.5	30.9	30.8	31.8	34.9	32.4
Weighted Average	**29.0**	**28.9**	**30.9**	**32.3**	**33.9**	**35.3**	**38.3**	**33.9**

<u>10 Year Demand Projection</u>

New housing requirements for the 2011-2020 decade are projected to average 6,185 units per year, including units required for a vacancy rate and to replace demolished units.

Housing demand will be met through a combination of intensification, units built in the rural area (9% of new units), and construction on vacant urban land. Intensification targets over the decade average 38.8% of new urban units (based on the Official Plan as modified by OPA 76 and the OMB). As shown in Table 9, construction on vacant urban land is projected to be approximately 3,450 units annually.

Table 9		
Projected Housing Demand in Ottawa, 2011-2020*		
	10 year Requirement	Annual Requirement
Total Unit Requirements	**61,854**	6,185
Allowance for rural units (9% of new households)	5,567	557
Total Urban Demand	**56,287**	5,629
Allowance for intensification (38.8%)	21,842	2,184
Unit demand on Vacant Urban Residential Land	**34,444**	**3,444**

*Note: based on OP Amendment 76 and Residential Land Strategy report, Feb. 2009

Combining the demand projection from Table 9 with the dwelling type mix from the 2009 Residential Land Strategy and applying the average density of the last five years (Table 4) results in a projected urban residential land requirement of 120 net ha per year over the next decade, as set out in Table 9a.

Table 9a			
Annual Demand for Housing on VURLS Land, 2011-2020			
Type	**Units**	**Density**	**Land (ha)**
Single-detached	1,851	21.9	84.5
Semi-detached	217	32.3	6.7
Townhouses	1,213	43.8	27.7
Stacked towns/Apartments	164	157.4	1.0
Total	**3,444**		**120.0**

Note: Stacked townhouses/Apartments density is an average of the two unit types

Note: Actual and projected housing starts on vacant land and land consumption are not strictly comparable since housing starts and land consumed include a few intensification parcels that are excluded from the land consumption projection. Hence, actual VURLS land consumed may be, other things being equal, slightly higher than the above projection.

5.2 Land Supply

The supply of vacant residential land and number of units it is planned for are shown in Table 10. As of December 2010, there were 2,301 net ha of vacant residential land in the urban area of Ottawa, with a total estimated development potential of 96,859 units.

Plan Status

Table 10 shows the approval status of land parcels. Four categories are noted:

- Registered subdivision plans: final approval (building permits can be issued)
- Draft approved plans: provisional approval (subject to clearance of conditions)
- Pending applications: plan submitted but no approval given
- No plan: no application has been submitted

As of December 2010, 30% of the land supply was in registered and draft approved plans (10% registered, 20% draft approved). The 693 hectares in this category represent a 5.8 year supply (Table 14) based on average land consumption between 2006 and 2010. Of the remaining land, 20% had pending submissions and 50% had no plan.

Kanata-Stittsville accounted for 35% of the total land supply, Riverside South held 21%, South Nepean 17%, Orleans 16%, Leitrim 6%, and Inside Greenbelt 5%.

Table 10

Urban Residential Land Supply and Unit Potential by Development Status and Area, December 2010

	Development Status									
	Registered		**Draft Approved**		**Pending**		**No Plan**		**Total**	
Area	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***	***Land Supply net ha***	***Unit Potential***
Inside Greenbelt	18.0	2,113	1.3	140	11.8	1,830	74.2	8,859	105.3	12,942
Kanata-Stittsville	90.1	3,645	167.5	4,610	168.9	5,651	368.6	12,655	795.0	26,561
South Nepean	70.6	2,625	53.6	3,275	76.0	3,073	187.1	14,222	387.3	23,195
Riverside South	8.1	256	53.5	1,887	76.3	3,791	358.9	10,505	496.8	16,439
Leitrim	14.8	504	91.8	2,818	12.5	380	19.1	928	138.1	4,630
Orléans	24.7	1,106	98.8	3,974	116.4	4,025	138.4	3,987	378.3	13,092
Sub-Total Outside Greenbelt	208.3	8,136	465.2	16,564	450.0	16,920	1,072.1	42,297	2,195.5	83,917
Total	**226.3**	**10,249**	**466.5**	**16,704**	**461.8**	**18,750**	**1,146.3**	**51,156**	**2,300.8**	**96,859**

<u>Land Ownership</u>

The holdings of the ten largest landowners (Table 11) decreased to 63.4% of total vacant land in 2010, from 64.4% in 2009. The decrease was mainly due to building out existing holdings and sales to other owners. In 2010, the five largest landowners were Richcraft (12.8% of the total supply), Urbandale (10.2%), Minto (9.5%), Mattamy (6.2%) and KNL Developments (5.1%). The most diversified landowner is Richcraft, with holdings in every area except Leitrim. Although Urbandale also holds a large amount of land, its holdings are concentrated in Riverside South and Kanata.

The effective share of land controlled by several of the major landowners in Tables 11 and 12 is understated as several jointly own large land-owning companies. For example, KNL Developments is jointly owned by Urbandale and Richcraft. Assuming even shares would boost these two builders to about 13% and 15% of the land supply respectively. CRT Developments is owned by Claridge, Richcraft and Tamarack. When added to their half share of KNL land, and factoring in a third of CRT Developments, Richcraft increases its share of land to an estimated 17%.

Table 11										
Share of Total Vacant Urban Land of 10 Largest Landowners, 2006-2010										
	Net Hectares Owned					**% of all Vacant Urban Land**				
Owner Name	**2006**	**2007**	**2008**	**2009**	**2010**	**2006**	**2007**	**2008**	**2009**	**2010**
Claridge Homes/Tenth Line	-	55.6	127.7	120.5	113.8	-	2.1	5.2	5.2	4.9
CRT Developments Inc.	-	-	-	76.4	89.2	-	-	-	3.3	3.9
Mattamy	107.4	108.3	149.5	153.5	143.2	3.9	4.2	6.1	6.6	6.2
Brookfield	132.5	132.5	132.5	-	-	4.8	5.1	5.4	-	-
Westpark	108.0	103.9	-	-	-	3.9	4.0	-	-	-
KNL Developments	120.6	120.1	119.8	117.0	116.9	4.4	4.6	4.9	5.0	5.1
Minto	121.7	173.7	242.6	187.6	218.4	4.4	6.7	9.9	8.1	9.5
Ashcroft	16.0	46.5	30.4	88.5	87.3	0.6	1.8	1.2	3.8	3.8
Tartan	95.2	87.1	77.0	76.4	77.1	3.5	3.3	3.2	3.3	3.4
Urbandale	288.6	258.6	317.2	231.4	235.7	10.5	9.9	13.0	9.9	10.2
Taggart/Tamarack	93.9	62.2	117.8	96.2	82.5	3.4	2.4	4.8	4.1	3.6
Richcraft	424.7	417.7	342.5	351.1	293.9	15.4	16.0	14.0	15.1	12.8
Total, Top 10 Owners	**1,508.6**	**1,566.2**	**1,657.0**	**1,498.6**	**1,458.1**	**54.8**	**60.1**	**67.9**	**64.4**	**63.4**
Total Vacant Land	**2,750.9**	**2,606.3**	**2,441.4**	**2,326.5**	**2,300.8**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Table 12 shows the ownership and planning status of major land holdings of 10 net ha or more in each major area. The 28 owners listed in the table controlled about 86% of the supply at the end of 2010, compared to 87% in 2009. Due to the difficulty of verifying ownership, caution is advised when interpreting these data.

Major Landowners by Area (Table 12)

Inside Greenbelt: Only one landowner, Canada Lands Company, with 60 ha or 57% of the total supply, held more than 10 ha inside the Greenbelt.

Kanata-Stittsville: Major owners were KNL (14.7%), CRT Developments (11.2%), Richcraft (9.6%), and Del (6.6%). The 17 owners with 10 or more ha each accounted for 91% of the total land supply.

South Nepean: Four owners accounted for 66% of the vacant land; Minto (23.4%), Mattamy (22.7%), Taggart/Tamarack (10.3%), and Monarch (9.8%). There were eight owners with 10 or more ha, accounting for 84% of the total supply.

Riverside South: Urbandale and Richcraft owned 41% and 26% of land respectively. Another 13% was owned by their RSDC partnership. Together they controlled 80% of the land supply.

Leitrim: Tartan and Remer held 52% and 21% of the land supply respectively, in total accounting for 73% of the Leitrim land supply. The four largest owners had 95% of the land supply.

Orléans: Four owners controlled almost 64% of the land supply: Minto was the largest, with 28% of vacant land. Richcraft had 17%, Ashcroft 12% and Claridge 6%. The eight owners with 10 or more ha had 75% of the land supply.

Table 12						
Residential Land Supply of Major Landowners (10 net ha and larger) by Area and Development Status, Dec. 2010						
Area	**Owner Name**	**Registered**	**Draft Approved**	**Pending**	**No Plan**	**Total (net ha)**
Inside Greenbelt	Canada Lands Company	-	-	-	60.0	60.0
Sub-Total, Inside Greenbelt		***-***	***-***	***-***	***60.0***	***60.0***
Kanata-Stittsville	Ashcroft Homes	1.3	-	33.0	-	34.3
	Bell, Grace	-	-	-	10.6	10.6
	Caivan Development Corp.	-	-	31.4	-	31.4
	CRT Developments Inc.	-	-	-	89.2	89.2
	Davidson, William	-	-	-	21.2	21.2
	Del	-	-	-	52.4	52.4
	Kanata Road Inc./Regional Group	11.3	31.5		-	42.7
	Kavanaugh	2.9	-	1.6	25.0	29.5
	KNL Developments	12.2	104.6	-	-	116.9
	Mattamy Dev. Co.	2.6	-	23.3	19.9	45.9
	Minto (West Kanata Development)	-	19.4	-	0.6	20.0
	Monarch	1.4	-	11.9	21.8	35.1
	Pleasant Valley Dairy	-	-	-	20.6	20.6
	Richcraft	7.6	-	27.0	42.1	76.6
	Taggart Corporation	2.2	-	14.7	14.6	31.5
	Tenth Line Developments/Claridge	21.3	-	4.0	4.9	30.2
	Urbandale	16.9	-	16.7	-	33.6
South Nepean	1150274 Ontario Inc. (Mattamy Dev. Co.)	17.4	-	28.2	42.5	88.1
	841164 Ontario Inc. (Monarch Construction)	30.5	-	3.6	4.0	38.1
	City of Ottawa	2.0	18.3	-	6.0	26.4
	DCR Phoenix	-	6.5	2.5	-	9.0
	Kennedy, Patrick	-	-	-	12.9	12.9
	Minto	10.2	27.3	2.8	50.5	90.8
	Richcraft	2.5	-	2.4	16.8	21.7
	Taggart Corporation\Tamarack Developments	-	-	28.6	11.1	39.7
Riverside South	Claridge Homes	-	5.4	-	30.9	36.3
	Ken Gordon	-	-	-	13.1	13.1
	Luigi Mion	-	-	-	12.5	12.5
	Richcraft	6.8	-	-	120.9	127.7
	Riverside South Development	-	42.7	23.2	-	66.0
	Urbandale	1.2	-	53.0	147.9	202.1
Leitrim	Claridge	-	10.8	-	-	10.8
	Fred Barrett Enterprises Ltd.	-	-	-	19.1	19.1
	Remer Holdings	-	29.2	-	-	29.2
	Tartan/Findlay Creek Properties	14.8	51.8	4.8	-	71.4
Orléans	1561976 Ontario Inc. (Ashcroft)	1.4	2.9	2.5	39.4	46.1
	City of Ottawa	-	-	-	9.6	9.6
	Claridge	5.6	16.1	1.3	-	22.9
	Jean-Guy Rivard	0.1	-	-	3.7	3.8
	Legault	-	-	-	20.8	20.8
	Minto	3.1	58.3	42.2	4.0	107.6
	Richcraft	0.3	10.6	52.6	-	63.5
	Taggart Corporation\Tamarack Developments	2.0	2.8	4.9	-	9.7
Sub-Total, Outside Greenbelt		***177.5***	***438.2***	***416.3***	***888.3***	***1,920.3***
Total (net ha)		***177.5***	***438.2***	***416.3***	***948.3***	***1,980.3***

Planned Density Compared with Development Density

Table 13 shows planned density by unit type as indicated on plans of subdivision. On registered, draft approved or pending lands, the planned density of singles, multiples and apartment units is actually lower than what was built over the last five years (and would appear likely to change), while planned densities for semi-detached units are higher.

Table 13 Unit Potential and Density by Unit Type, 2010 Registered, Draft Approved and Pending Lands				
Unit Type	**Units**	**% of Grand Total**	**Hectares**	**Units/Hectare**
Single-detached	9,470	9.8	433.9	21.8
Semi-detached	1,270	1.3	37.3	34.0
Townhouses	11,944	12.3	277.2	43.1
Stacked Townhouses	4,791	4.9	71.6	67.0
Apartments	6,353	6.6	44.7	142.0
Sub-total	*33,828*	*34.9*	*864.7*	*39.1*
Mixed Units	11,875	12.3	289.8	41.0
Total with Plans	**45,703**	**47.2**	**1,154.5**	**39.6**
No Plan Lands				
Mixed Units	51,156	52.8	1,146.3	44.6
Grand Total	**96,859**	**100.0**	**2,300.8**	**42.1**

*Stacked townhouses are included in apartments.

5.3 2005 Provincial Policy Statement

The *Provincial Policy Statement* (PPS) contains policies for residential land to ensure that supply is sufficient.

- Maintain at all times the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands which are designated and available for residential development. (Policy 1.4.1a)

The 2,301 ha in the inventory at the end of 2010 exceeded the 10 year PPS requirement. Based on projected demand of 120 net ha per year over the next decade and the 2,195 net ha land supply outside the Greenbelt (land inside the Greenbelt being all intensification), the land supply would be sufficient for approximately 18 years. This does not include an additional 620 gross ha required to be added by the June 2011 OMB decision. Including that land would bring the supply to 21 years (the year 2031).

- Maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a 3 year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans. (Policy 1.4.1b)

There is a 5.8 year supply of registered and draft approved lands based on projected land consumption over the next decade (Table 14). This exceeds the PPS requirement for three years of registered and draft approved land. This survey does not inventory most intensification land, so that aspect of the policy is not assessed.

Table 14			
Supply of Registered and Draft Approved Lands in December 2010, by Unit Type			
Unit Type	**Registered and Draft Approved Land (net ha)**	**Projected Annual Consumption (net ha)**	**Demand Years of Supply**
Single detached	278.4	86.2	3.2
Semi-detached	26.4	6.4	4.1
Townhouse	151.1	27.9	5.4
Stacks/Apartments	74.9	1.6	46.8
Mixed*	161.9	-	n/a
Total	**692.7**	**120**	**5.8**

*Most of these lands will be developed for single-detached and townhouse units.

Servicing for registered and draft approved lands by area is shown in Table 15. (Note that in Tables 15 and 16 demand is estimated based on past absorption rates since demand has not been projected by sub-area; since consumption over the past five years is almost 13% higher than projected land consumption in the next decade, both tables understate actual supply years.) Conservatively, supply is sufficient for 1.8 years Inside Greenbelt, 4.9 years in Kanata-Stittsville, 3.4 years in South Nepean, 8.0 years in Riverside South, 16.9 years in Leitrim and 4.0 years in Orléans. Land is considered serviced if it is provided with trunk sewer and watermains with capacity available. Based on the past five-year consumption rate, the overall supply is 4.8 years (Table 15).

If the projected annual demand for urban land of 120 net ha (Table 9a) is applied, the serviced registered and draft approved land supply is sufficient for 5.4 years.

Table 15			
Serviced Land Supply in Registered and Draft Approved Lands in December 2010			
Area	**Serviced Land Supply (net ha)**	**Average Annual Consumption (net ha)**	**Demand Years of Supply***
Inside Greenbelt	19.3	10.8	1.8
Kanata/Stittsville	211.5	43.5	4.9
South Nepean	124.8	36.5	3.4
Riverside South	61.6	7.7	8.0
Leitrim	106.6	6.3	16.9
Orléans	123.5	30.5	4.0
Total	**647.2**	**135.3**	**4.8**

*Based on average consumption rates over the last five years.

In December 2010, the overall supply of serviced residential land was 1,490 net ha. Table 16 shows supply by area and the estimated number of demand years based on average consumption over the last five years. The overall serviced supply in 2010 increased to 11.0 years from 10.5 years in 2009.

If the projected demand for urban land of 120 net ha annually is applied, serviced land supply is 12.4 years.

Table 16

Serviced Land Supply and Consumption by Area, December 2010

Area	Serviced Land Supply (net ha)	Average Annual Consumption (net ha)	Demand Years of Supply*
Inside Greenbelt	95	10.8	8.8
Kanata/Stittsville	407	43.5	9.4
South Nepean	289	36.5	7.9
Riverside South	182	7.7	23.6
Leitrim	138	6.3	21.9
Orléans	379	30.5	12.4
Total	**1,490**	**135.3**	**11.0**

* Based on average consumption rates over the last five years.

Applying the average rates of consumption for the last five years, servicing is adequate for about 8.8 years Inside Greenbelt, 9.4 years in Kanata-Stittsville, 7.9 years in South Nepean, 23.6 years in Riverside South, 21.9 years in Leitrim, and 12.4 years in Orléans.

6. CONCLUSION

Overall, the supply of land for new housing in Ottawa at the end of 2010 met all policies of the Provincial Policy Statement for greenfield residential land. Ottawa's vacant residential land supply of 2,301 net ha at the end of 2010 had an estimated potential for approximately 96,859 housing units.

When additional urban residential land is added as required by the June 2011 OMB decision on the urban boundary, total suburban land supply will be sufficient to 2031.