



# **City of Ottawa**

## Land Needs Assessment

March 3, 2025

# Parcel

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# Executive Summary

Parcel Economics Inc. ("Parcel") has been retained by the South March Landowners Group, which includes Claridge Homes (Second Line) Inc., Claridge Homes (1221 March Road) Inc., 2721334 Ontario Limited, Mattamy (Kanata North) Limited, Minto (Old Carp Road) Inc., Second Line Regional Inc., Kanata North Regional Inc., and Uniform Urban Developments Ltd. The purpose of our retainer has been to prepare a Land Needs Assessment ("LNA") for the City of Ottawa to accommodate residential growth to 2046, and to satisfy, where appropriate, the Terms of Reference for *Urban and Village Area Boundary Expansion - Land Needs Assessment* (the "Land Needs TOR").

In completing our LNA, we have considered three key themes, including:

1. Recent policy direction in the *Provincial Planning Statement, 2024* ("PPS, 2024"), specifically as it relates to growth forecasts and settlement area boundary expansions;
2. The need for housing in the city to 2046, based on the Fall 2024 Ministry of Finance Ontario Population Projections; and,
3. Determination of residential land needs to 2046.

## Background and Policy Context

As part of the City of Ottawa's New Official Plan, a *Residential Growth Management Strategy* ("GMS") was prepared by city staff in March 2020. The purpose of the GMS, among other things, was to identify the amount of residential land that would be required in Ottawa to accommodate growth between 2018 and 2046. Ultimately, the GMS recommended the city adopt the "balanced scenario" to accommodate residential growth to the year 2046. This included accommodating 51% of new urban residential units within the built-up area ("BUA") of the City. This resulted in the need to expand the City of Ottawa Urban Boundary to accommodate an additional 1,281 hectares of land for residential development.

Recently the Ministry of Municipal Affairs and Housing released the PPS, 2024. Section 2.1.1 directs planning authorities to base population and employment growth forecasts on Ontario Population Projections published by the Ministry of Finance. Therefore, we have prepared the following LNA based on the most recent population projections published by the Ontario Ministry of Finance in the Fall of 2024 (the "Fall 2024" projections).

## Ministry of Finance Population Projections

The population forecasts prepared by the City of Ottawa in 2019 are outdated and do not consider recent changes in Federal immigration targets that are impacting the need for housing. The most recent Ministry of Finance population projections were prepared in Fall 2024 and forecast a population of 1.66 million persons in the City of Ottawa by 2046. **This is approximately 254,400 persons more** than the population forecasts contained in the City of Ottawa 2019 Growth Forecasts. It is also important to note that the Ministry of Finance Fall 2024 population forecasts for Ottawa exceed the High Projection scenario established by the City in the City of Ottawa 2019 Growth Forecasts (1,587,000 persons by 2046).

## Household Growth

In estimating Greenfield Area land needs to 2046, Parcel has translated the population growth forecasts from the Ontario Ministry of Finance into household growth using household formation rates (i.e. headship rates) that were contained in *Growth Projections for the New Official Plan: Methods and Assumptions for Population, Housing and Employment 2018 to 2046*, prepared by the City of Ottawa in November 2019 (the “City of Ottawa 2019 Growth Forecasts”).

Applying these household formation rates to the population growth forecasts from the Ontario Ministry of Finance results in 320,755 additional households in the City of Ottawa between 2018 and 2046. This is 125,955 households more than forecast in the City of Ottawa 2019 Growth Forecasts.

## Residential Land Needs

Based on household growth forecasts contained in the City of Ottawa Official Plan, as of October 1, 2024, the Greenfield Area is estimated to have a 13.7-year supply of vacant land available for development. Household growth forecasts based on the Fall 2024 Ontario Population Projections result in there being only 8.2 years supply of vacant land available for development in the Greenfield Area. These estimates are below the 15-year supply target.

We have relied on the approach utilized by the City of Ottawa in the GMS and applied the Ontario Ministry of Finance growth forecasts to estimate residential land needs to accommodate demand to 2046. Based on these assumptions, we arrive at an estimated need to expand the Ottawa Urban Boundary to accommodate **an additional 4,500 gross hectares**. This is **3.5x larger** than the 1,281-hectare expansion identified in the City of Ottawa GMS. The estimated land needs in Ottawa assume a net residential-to-gross developable land ratio of 50%, which is consistent with the assumption used in the GMS. Our land needs scenario also results in a net residential density of 38 units per hectare, which exceeds the minimum density identified in the Land Needs TOR.

The South March lands, which collectively comprise 233 hectares, will be important in addressing this forecast shortfall, as they were one of the highest scoring expansion areas considered as part of the new City of Ottawa Official Plan.

1.0

## **Introduction**



Parcel Economics Inc. ("Parcel") has been retained by the South March Landowners Group, which includes Claridge Homes (Second Line) Inc., Claridge Homes (1221 March Road) Inc., 2721334 Ontario Limited, Mattamy (Kanata North) Limited, Minto (Old Carp Road) Inc., Second Line Regional Inc., Kanata North Regional Inc., and Uniform Urban Developments Ltd (collectively referred to as the "landowners"). The purpose of our retainer has been to prepare a Land Needs Assessment ("LNA") that identifies the amount of land required in the City of Ottawa to accommodate residential growth to 2046.

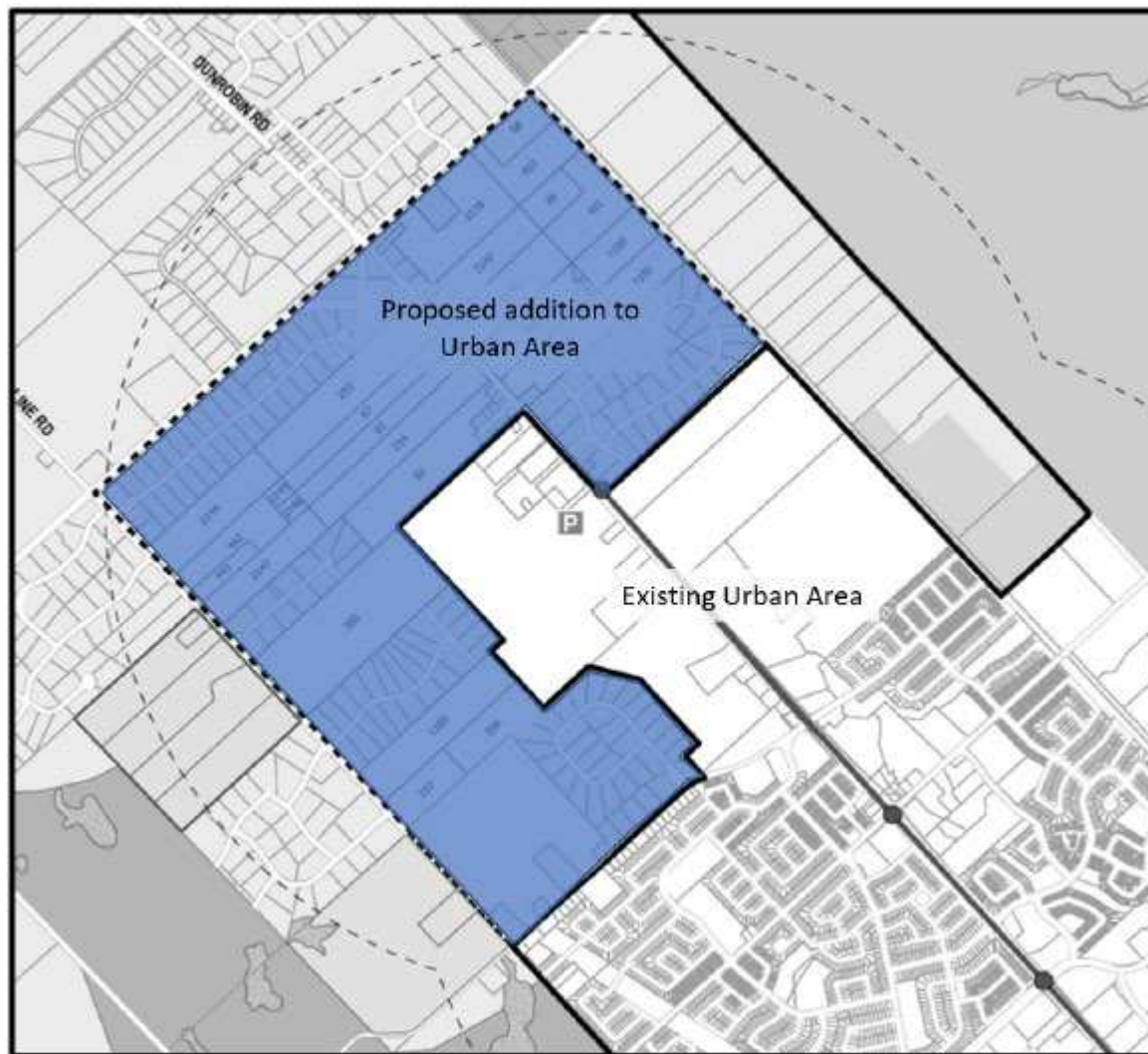
## **1.1 Background**

The landowners currently own lands within an area identified as the South March Cluster, as shown in Figure 1.1. The South March Cluster was considered as a proposed addition to the Ottawa Urban Area as part of the City's New Official Plan that Council adopted in 2021.

The South March Cluster, which is located adjacent to the existing Urban Area boundary in Ottawa, represents approximately 233 hectares of land. As shown in Figure 1.1, these lands are bound by the Beachburg rail corridor (non-active) in the east, Cameron Harvey Drive and March Road in the north, Old Second Line in the west and the Urban Boundary in the south. As shown, the lands are an irregular shape that wrap around portions of the Urban Area, as a result of the previous urban expansion approved through Official Plan Amendment No. 76.

Figure 1.1

## Location of South March Cluster



Source: Parcel based on City of Ottawa, Document 2 - Category 1 and 2 lands.

As part of the new Official Plan for the City of Ottawa, population, employment and household growth forecasts were prepared by the city. These forecasts were contained in the *Growth Projections for the New Official Plan: Methods and Assumptions for Population, Housing and Employment 2018 to 2046*, prepared in November 2019 (the "City of Ottawa 2019 Growth Forecasts"). As part of these forecasts, the population in the City of Ottawa was anticipated to reach 1,410,000 persons by 2046 under the Medium Projection scenario, which represented 402,000 new persons between 2018 and 2046. As part of the City of Ottawa 2019 Growth Forecasts, Low Projections and High Projections were also prepared. Under the High Projection, the City could grow to has many as 1,587,000

persons by 2046. Ultimately the Medium Projection was the recommended scenario as the basis for the new Official Plan. Under the Medium Projection, the City would need to accommodate 194,800 new dwelling units between 2018 and 2046.

As part of the City of Ottawa's new Official Plan, a *Residential Growth Management Strategy* ("GMS") was prepared by city staff in March 2020. The purpose of the GMS, among other things, was to identify the amount of residential land that would be required in Ottawa to accommodate growth between 2018 and 2046. The GMS was based on the Medium Projection scenario contained in City of Ottawa 2019 Growth Forecasts.

The GMS considered three (3) growth scenarios and greenfield land required to accommodate this growth. Each of these scenarios assumed that 13,000 units would be accommodated within the Rural Areas of the City, with the remaining growth allocated to the Urban Area, which included the Built-up Area and the Greenfield. These three growth scenarios included:

- 1) **Status Quo** – This scenario was set to accommodate 45% of new Urban Area development within the Built-up Areas between 2018 and 2046 and the remaining development (55% of growth) accommodated within the Greenfield. This scenario was based on maintaining current incremental changes to the intensification target. This resulted in a need to expand the Urban Area boundary to accommodate 1,868 gross hectares.
- 2) **No Expansion** – This scenario considered no further expansion to the Urban Area boundary. Under this scenario, the rate of intensification would need to increase to 100% by 2046. In this scenario, between 2018 and 2046, 64% of new development would be accommodated within the Built-up Area, with the remaining 36% allocated to the Greenfield Area. Under this scenario, there would be no expansion to the Urban Area boundary.
- 3) **Balanced** – This scenario was considered a balanced approach between the Status Quo and No Expansion Scenario. Under this scenario, 51% of Urban Area growth between 2018 and 2046 would be accommodated within the Built-up Area, with the remaining growth accommodated within the Greenfield Area. This resulted in a need to expand the Urban Area boundary to accommodate 1,281 gross hectares.

Ultimately, the GMS recommended the city adopt the "balanced scenario" to accommodate residential growth to the year 2046.

In identifying 1,281 gross hectares of land to include within the Urban Area boundary to satisfy demand to 2046, the City prepared evaluation criteria and scoring to evaluate the most suitable lands for inclusion within the Urban Area.

The South March Cluster was deemed Category 1 lands and recommended for inclusion within the Urban Area, as they were one of the highest scoring clusters of land being considered for inclusion. Despite being recommended

by staff for inclusion within the Urban Area, when City Council ultimately adopted the new Official Plan in November 2021, the South March Cluster was not included in the Urban Area.

On October 20, 2024 the City of Ottawa released a terms of reference titled *Urban and Village Boundary Expansion – Land Needs Assessment* (the “Land Needs TOR”). The Land Needs TOR is intended to be used for privately initiated Urban and Village Area boundary expansion official plan amendment (“OPA”) applications outside of a municipal comprehensive review. The Land Needs TOR identifies contents that should be included in an OPA application for a boundary expansion application. This includes:

- a) *The need to designate and plan for additional land to accommodate an appropriate range and mix of land uses*
- b) *The new or expanded settlement area provides for the phased progression of urban development*
- c) *That there are insufficient opportunities within the urban and all village areas to accommodate a 15-year supply of market-based residential development*
- d) *That there are insufficient opportunities to accommodate projected employment and other land uses*
- e) *Net residential densities shall strive to approach the densities of the Inner Urban Transect over time, but residential development within the urban expansion areas, shall plan for a minimum density of 36 units per net hectare and permit density increases through intensification and accessory dwelling units*

*The Land Needs Assessment should also consider appropriate net residential-to-gross-developable land ratios or alternate means of determining the total community land need. “Net residential” refers to the portion of a future neighbourhood with residential uses, and “gross developable land” refers to the developable lands of a future neighbourhood to support the proposed residential uses, including but not limited to roads, transit-related areas, active transportation connections, parks, schools, community amenities, and commercial services. For example, a 50 per cent ratio means that for a proposed parcel with 100 developable hectares, 50 hectares are required for the proposed residential lots and blocks and 50 hectares are required for the other supporting uses above. At a minimum, a scenario of a 50 per cent ratio should be used, but other ratios or methods may also be presented as alternate scenarios along with justification.*

## 1.2 Policy Context

The following provides a review of relevant sections of the *Provincial Planning Statement, 2024* ("PPS, 2024") and the *City of Ottawa Official Plan* that informed the preparation of our LNA for the City of Ottawa.

### Provincial Planning Statement, 2024

In August 2024, the Ministry of Municipal Affairs and Housing ("MMAH") released the PPS, 2024, which replaces the *Provincial Policy Statement, 2020* and came into effect on October 20, 2024.<sup>1</sup>

The PPS, 2024 is issued under the authority of Section 3 of the *Planning Act* and is the primary provincial land use planning policy document, applying across Ontario. The PPS, 2024 also provides policy direction on matters applying only to Ontario's largest and fastest growing municipalities, which are identified in Schedule 1 of the PPS and include the City of Ottawa.

In determining the need to designate or plan for land to accommodate growth, Section 2.1 Planning for People and Homes, provides guidance on the population and employment forecasts that shall be used in planning for growth, where it states:

1. *As informed by provincial guidance, planning authorities shall base population and employment growth forecasts on Ontario Population Projections published by the Ministry of Finance and may modify projections, as appropriate.*
2. *Notwithstanding policy 2.1.1, municipalities may continue to forecast growth using population and employment forecasts previously issued by the Province for the purposes of land use planning.*
3. *At the time of creating a new official plan and each official plan update, sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of at least 20 years, but not more than 30 years, informed by provincial guidance. Planning for infrastructure, public service facilities, strategic growth areas and employment areas may extend beyond this time horizon.*

*Where the Minister of Municipal Affairs and Housing has made a zoning order, the resulting development potential shall be in addition to projected needs over the planning horizon*

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<sup>1</sup> The PPS, 2024 also replaces *A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019*.

*established in the official plan. At the time of the municipality's next official plan update, this additional growth shall be incorporated into the official plan and related infrastructure plans.*

As noted in Section 2.1.1., municipalities shall now base population growth forecasts on the forecasts prepared by the Ontario Ministry of Finance. As will be discussed later in this LNA, the latest Ontario Ministry of Finance forecasts were published in fall 2024.

As it relates to intensification and density targets, Section 2.3 Settlement Area and Settlement Area Boundary Expansions states:

- 3. Planning authorities shall support general intensification and redevelopment to support the achievement of complete communities, including by planning for a range and mix of housing options and prioritizing planning and investment in the necessary infrastructure and public service facilities.*
- 4. Planning authorities shall establish and implement minimum targets for intensification and redevelopment within built-up areas, based on local conditions.*
- 5. Planning authorities are encouraged to establish density targets for designated growth areas, based on local conditions. Large and fast-growing municipalities are encouraged to plan for a target of 50 residents and jobs per gross hectare in designated growth areas.*

The PPS, 2024 does not identify a minimum intensification target. As noted in Policy 2.3.5 of the PPS, 2024, large and fast-growing municipalities, including Ottawa, are encouraged to plan for a density target of 50 residents and jobs per hectare across the designated growth area.

As it relates to Settlement Area Boundary Expansions, Section 2.3.2 states:

- 1. In identifying a new settlement area or allowing a settlement area boundary expansion, planning authorities shall consider the following:*
  - a) the need to designate and plan for additional land to accommodate an appropriate range and mix of land uses;*
  - b) if there is sufficient capacity in existing or planned infrastructure and public service facilities;*
  - c) whether the applicable lands comprise specialty crop areas;*



- d) the evaluation of alternative locations which avoid prime agricultural areas and, where avoidance is not possible, consider reasonable alternatives on lower priority agricultural lands in prime agricultural areas;*
- e) whether the new or expanded settlement area complies with the minimum distance separation formulae;*
- f) whether impacts on the agricultural system are avoided, or where avoidance is not possible, minimized and mitigated to the extent feasible as determined through an agricultural impact assessment or equivalent analysis, based on provincial guidance; and*
- g) the new or expanded settlement area provides for the phased progression of urban development.*

The purpose of this LNA is to satisfy Policy 2.3.2.1.a) and g) by determining if there is a need to designate additional land to accommodate an appropriate range and mix of land uses and addressing if the expanded settlement area provides for a phased progression of urban development.

## City of Ottawa Official Plan

The City of Ottawa Official Plan was adopted by Council on November 24, 2021, and approved by the Ministry of Municipal Affairs and Housing on November 4, 2022. Section 3 of the Official Plan address the Growth Management Framework that has been incorporated into this LNA.

As it relates to the location of new residential growth, the City of Ottawa Official Plan states that:

*Most growth will occur within the urban area of the City, with a majority of residential growth to be within the built-up area through intensification, increasing over time during the planning horizon.*

It goes on to state:

*Much of the demand for new housing is expected to be for ground-oriented units, such as single-detached, semi-detached, rowhouse dwellings and new forms not yet developed. Within the Greenbelt, where most of the housing growth in the built-up area is expected to occur, new housing development will be both in the form of larger dwelling units and apartments. All of the greenfield dwellings will be located in the Suburban Transect. Many of the new dwellings there will be in the form*

*of ground-oriented units, but at least 10 per cent will be apartments. The rural area is expected to account for about seven per cent of the new housing, mostly in the form of single-detached dwellings.*

As it relates to designating sufficient land for growth, Policy 3.1.1 states:

- 1) *Sufficient land shall be designated for growth to meet the projected requirement for population, housing, employment and other purposes for a period of 25 years in accordance with the Provincial Policy Statement.*

As it relates to intensification, Section 3.2 Supporting Intensification states:

*This Plan allocates 47 per cent of city-wide dwelling growth to the built-up portion of the urban area and 46 per cent of city-wide dwelling growth to the greenfield portion of the urban area. Growth within the built-up portion of the urban area represents 51 per cent of urban area growth from 2018 to 2046.*

...

- 1) *The target amount of dwelling growth in the urban area that is to occur through intensification is 51 per cent and represents the proportion of new residential dwelling units, excluding institutional and collective units such as senior's and student residences, based upon building permit issuance within the built-up portion of the urban area. This overall target is anticipated to be achieved through a gradual increase in intensification throughout the urban area that was developed or built-up as of June 30, 2018 as follows:*
  - a) *2018 to 2021: 40 per cent;*
  - b) *2022 to 2026: 45 per cent;*
  - c) *2027 to 2031: 50 per cent;*
  - d) *2032 to 2036: 54 per cent;*
  - e) *2037 to 2041: 57 per cent; and*
  - f) *2042 to 2046: 60 per cent.*

This intensification target of 51% of units in the Urban Area is consistent with the target used in the Balanced Scenario in the GMS. Based on forecast household growth in the GMS and the intensification target, the City is anticipated to accommodate 92,000 units within the Built-up Area between 2018 and 2046. Table 2 of the City of Ottawa Official Plan goes on to target 49,000 of these units (53% of intensification units) to be ground-oriented units, including single-detached, semi-detached and row units.

Policy 3.2.10 goes on to establish residential density targets for the various policy areas within the City of Ottawa Official Plan. Table 3b establishes residential density targets for Neighbourhoods and Minor Corridors. For Outer Urban Transects and Suburban Transects, which include the Greenfield Areas, the City of Ottawa Official Plan identifies dwellings per hectare density targets of 40 to 60 units per net hectare.

# 2.0

## **Population and Housing Growth Trends**

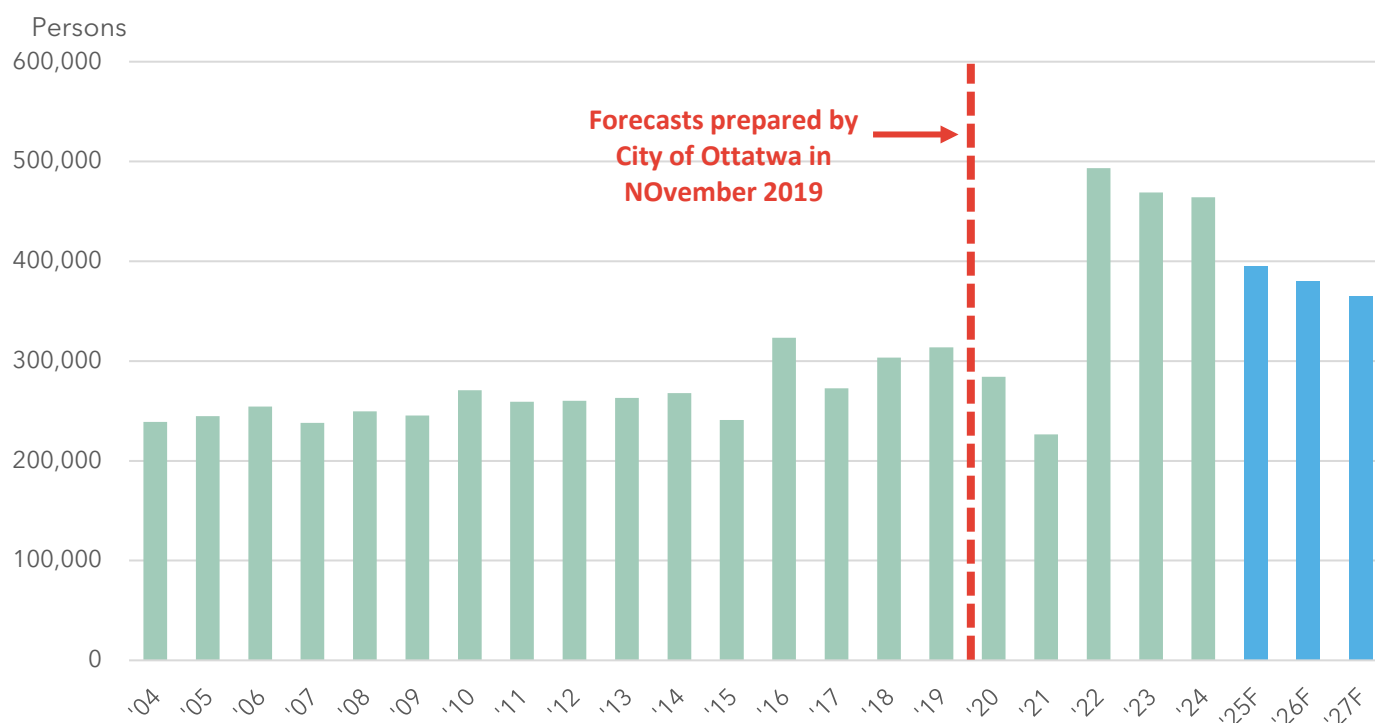
In preparing this LNA, we have reviewed recent population growth trends in the City of Ottawa and housing construction activity to determine if there have been any recent changes that could impact future growth.

## Population Growth Trends

In recent years, the most significant change to the population growth rates relate to recent rates of immigration to Canada and the Federal immigration targets, both of which have increased substantially in recent years and resulted in Canada experiencing unprecedented population growth. In the 20-years prior to the preparation of the population forecasts by the City of Ottawa, Canada welcomed approximately 260,000 international immigrants per year. The level of international immigration increased to 475,000 new residents per year between 2021 and 2024.

Figure 2.1

### International Immigration to Canada (2004-2027)



Source: Parcel based on Statistics Canada (green) and Federal immigration targets (blue).

On October 24, 2024, the Federal Government revised international immigration targets for Canada to the year 2027. In 2025 the Federal Government is targeting immigration of 395,000 persons, declining to 380,000

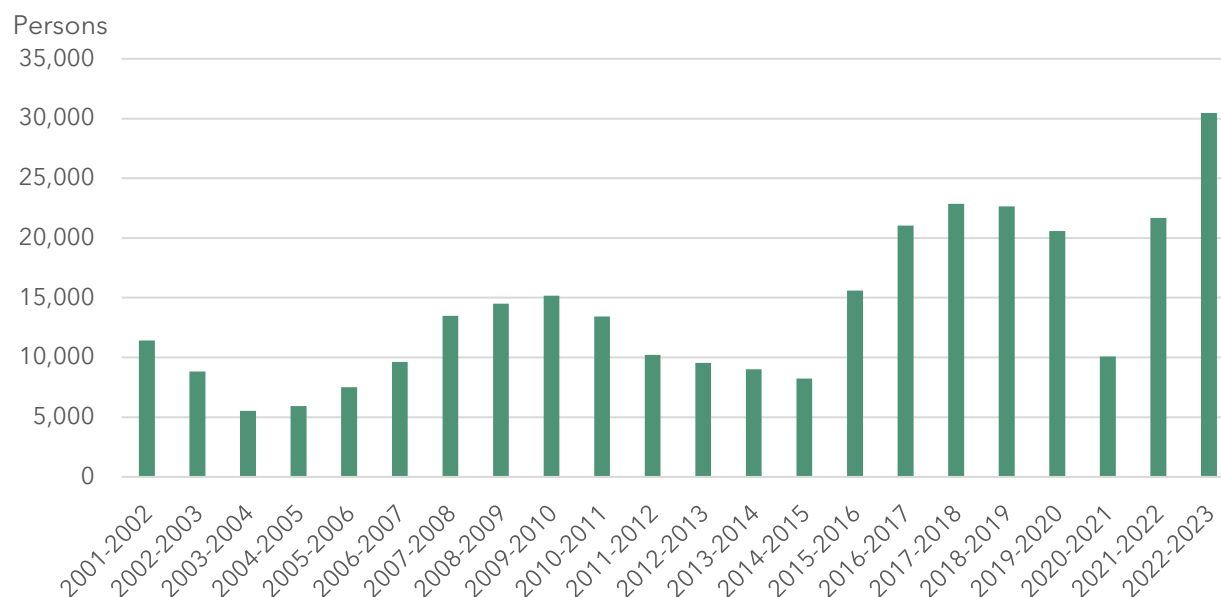
immigrants in 2026 and 365,000 immigrants in 2027. These revised targets are lower than previous targets released by the Federal Government in 2023, which targeted 500,000 immigrants per year. Despite the decline, these targets remain higher than levels of immigration achieved prior to the COVID-19 pandemic.

Recent migration trends have resulted in elevated population growth in Ottawa since 2015. As shown in Figure 2.2, between 2001 and 2015, the population in Ottawa grew by an average of approximately 10,200 persons per year. Since 2015, average annual population growth is nearly double (20,600 person per year) the growth experienced between 2001 and 2015. It is important to highlight that higher population growth in the City started prior to the COVID-19 pandemic.

To put this population growth into context, the City of Ottawa 2019 Growth Forecasts anticipate 402,000 new persons in Ottawa over the 28-year period between 2018 and 2046. This represents growth of approximately 14,400 persons per year, or about 30% lower than recent population growth trends (20,600 persons per year).

Figure 2.2

## City of Ottawa Annual Population Growth



Source: Parcel based on Statistics Canada.

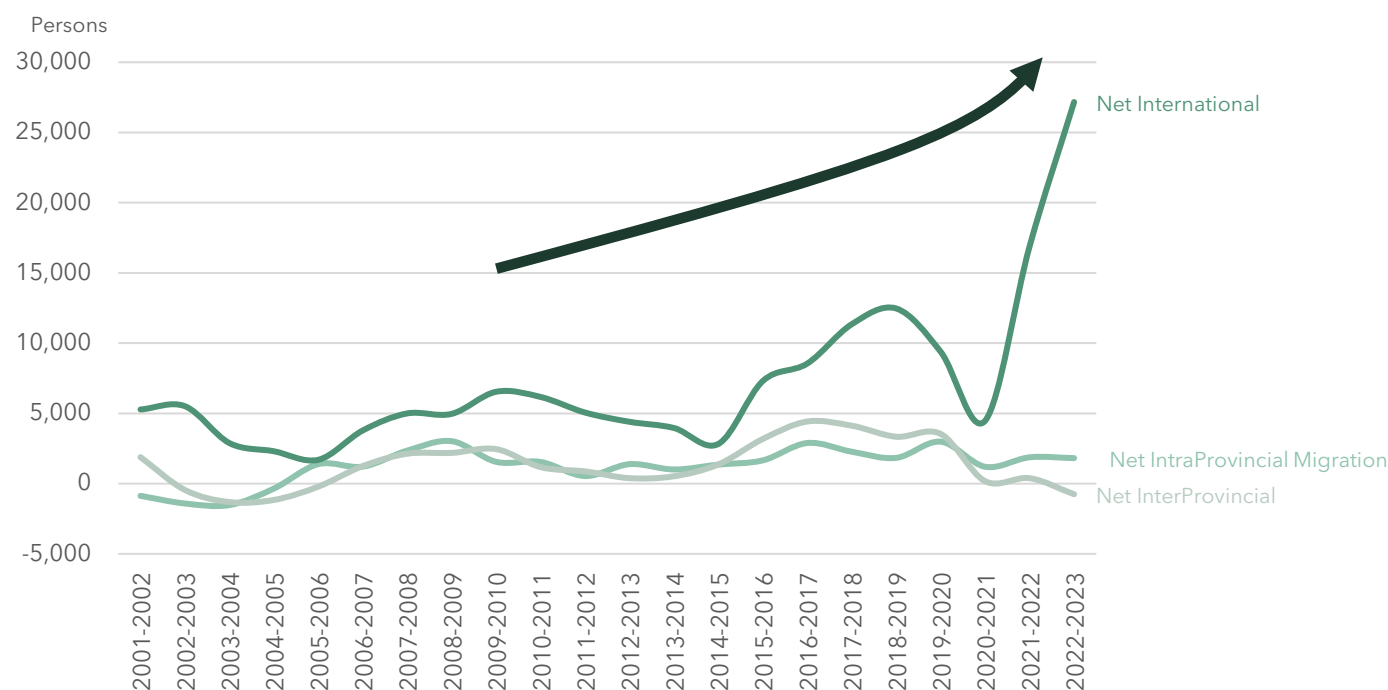
Increased migration to Canada is a significant contributor to population growth in the City of Ottawa. As shown in Figure 2.3, net international migration accounted for the largest share of population growth in the city and has been trending higher, aside from a dip in 2020 associated with the COVID-19 pandemic. Similarly, the nation-wide



increase in international immigration in 2022 (as shown previously in Figure 2.1), also resulted in an increase in net international migration to Ottawa during the same period. The elevated international migration targets in Canada are likely to contribute towards elevated population growth in Ottawa going forward.

Figure 2.3

### City of Ottawa, Net International Migration

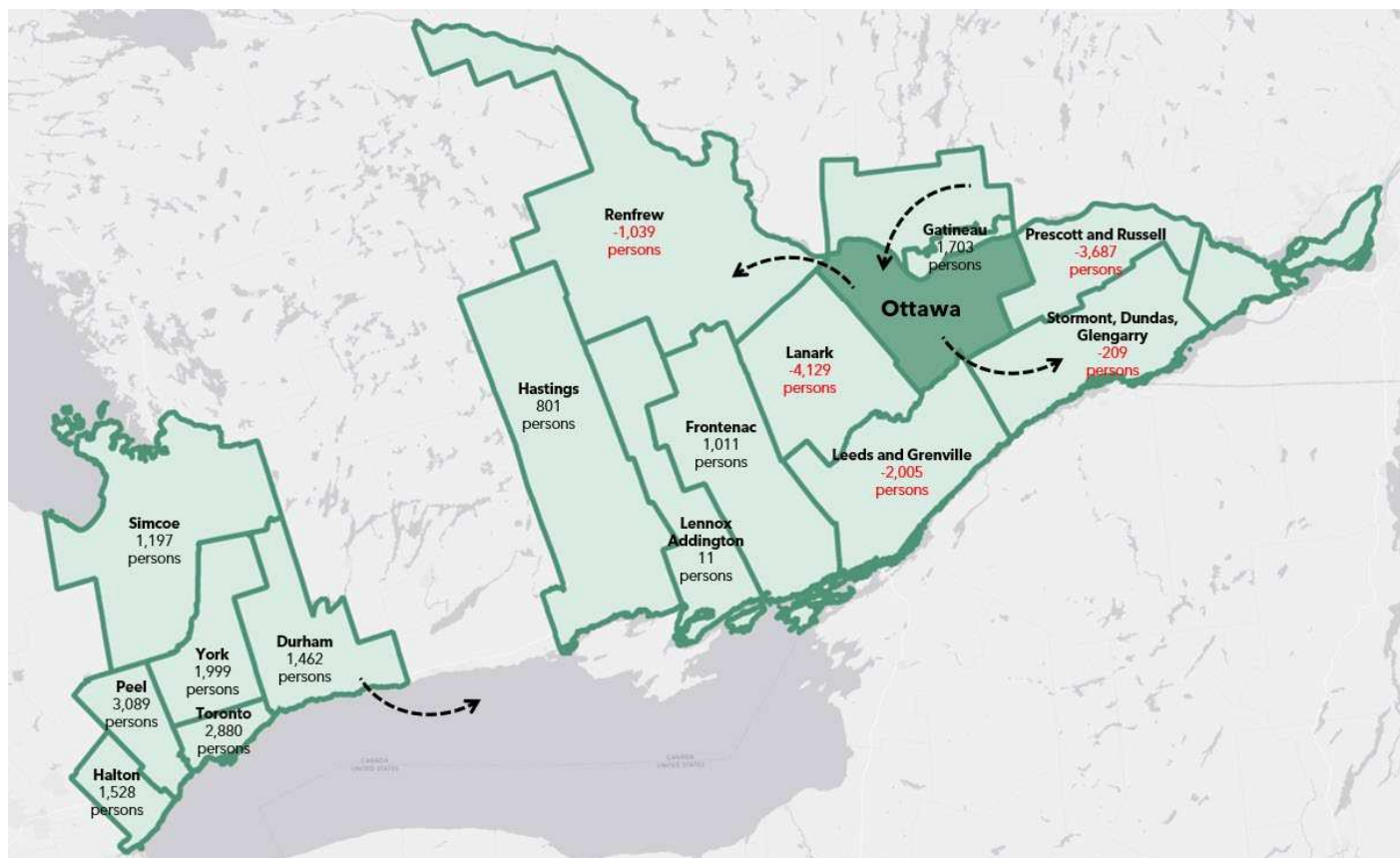


Source: Parcel based on Statistics Canada data.

At the same time, intra-provincial migration, which is people moving to Ottawa from elsewhere in Ontario, has also been a consistent part of population growth. There is a very clear trend of people moving to the City from the Greater Toronto Area ("GTA"), including Peel, Toronto, York, Halton, and Durham. A total of 10,958 net new persons moved from the GTA to the City of Ottawa between 2016 and 2021, as shown in Figure 2.4. These new residents are likely attracted by the quality of life afforded by the City of Ottawa. There is also a clear trend of people leaving Ottawa for Lanark County, Prescott and Russell, Leeds and Grenville, and Renfrew County Region, likely due to lower housing costs in these jurisdictions.

Figure 2.4

## Net Migration Between the City of Ottawa and Census Divisions, 2016-2021



Note: positive numbers show net migration to the City of Ottawa, while negative numbers show net migration from the City of Ottawa.

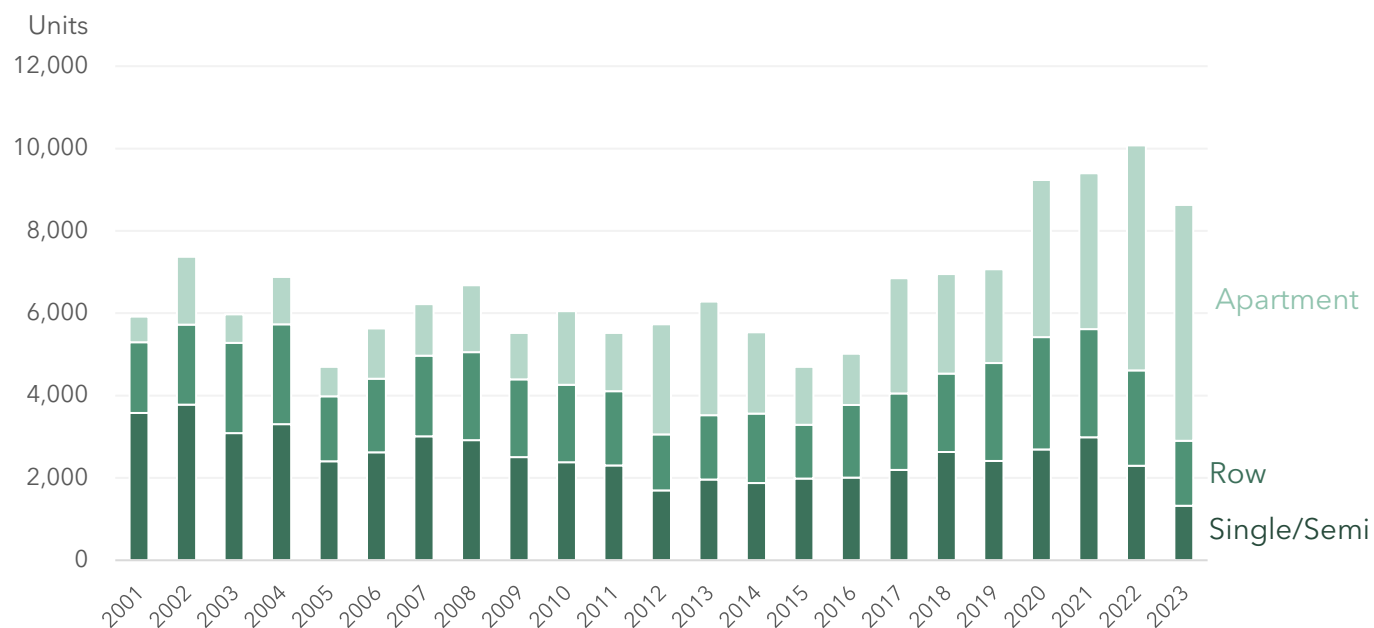
Source: Parcel based on Statistics Canada Tax Filer Migration Data.

## Housing Construction Activity

The recent increase in population growth has also impacted housing construction activity. As shown in Figure 2.5, housing starts have been elevated since 2017, averaging approximately 8,300 units per year. This is substantially higher than the average of approximately 5,900 units per year experienced between 2001 and 2016. The increase in housing starts is closely tied to the recent increase in population growth.

Figure 2.5

## City of Ottawa Housing Starts



# 3.0

## **Population and Household Growth Forecasts**

In forecasting population and household growth in the City of Ottawa, we have also relied on the Fall 2024 Ontario Population Projections prepared by the Ontario Ministry of Finance, as directed in Section 2.1.1 of the PPS, 2024.

## Ministry of Finance Forecasts & Methodology

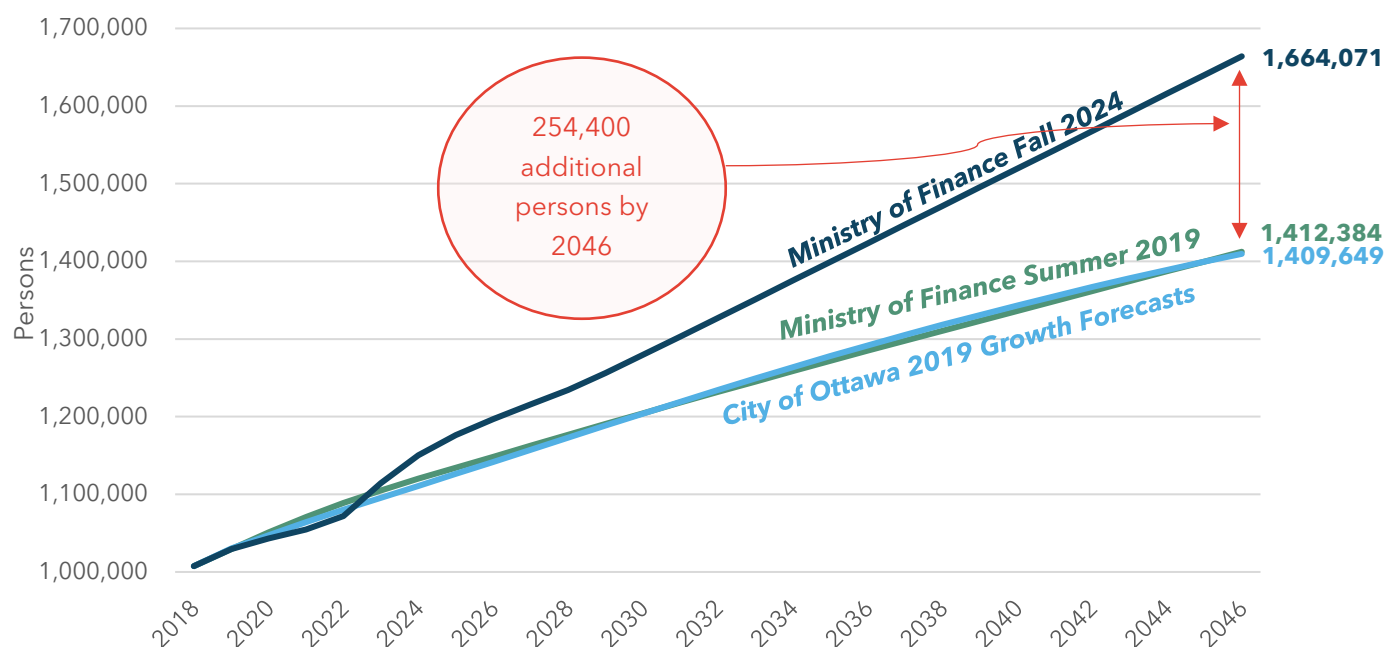
The Ontario Ministry of Finance prepares population forecasts for the province and each of the 49 Census Divisions annually. These forecasts are based on the most up-to-date trends and historical data. The Ontario Ministry of Finance uses a cohort-component methodology that provides projections of births, deaths and five migration components (immigration, emigration, net change in non-permanent residents, interprovincial in-migration and out-migration and intraprovincial in- and out-migration). These components of population growth (or decline) are consistent with the components used by city-staff in preparing City of Ottawa 2019 Growth Forecasts.

The most recent forecasts for the City of Ottawa were prepared by the Ontario Ministry of Finance in Fall 2024 and forecast a population of 1.66 million persons in the City by 2046. **This is approximately 254,400 persons more** than the population forecasts contained in the City of Ottawa 2019 Growth Forecasts, as shown in Figure 3.1. Furthermore, the Fall 2024 population forecasts for Ottawa exceed the High Projection scenario considered by the City in the City of Ottawa 2019 Growth Forecasts (1,587,000 persons by 2046).

It is also important to note that the population forecast prepared by the Ontario Ministry of Finance in Summer 2019 (around the same time the Ottawa 2019 Growth Forecasts were prepared), forecast a population of 1.4 million persons in the City of Ottawa by 2046. The Ministry of Finance Summer 2019 forecasts are nearly the same as the forecasts prepared by the City in 2019 (difference of only 2,735 persons by 2046).

Figure 3.1

## City of Ottawa Population Forecast, 2018-2046



Source: Parcel based on Ontario Ministry of Finance Annual Population Projections, various years.

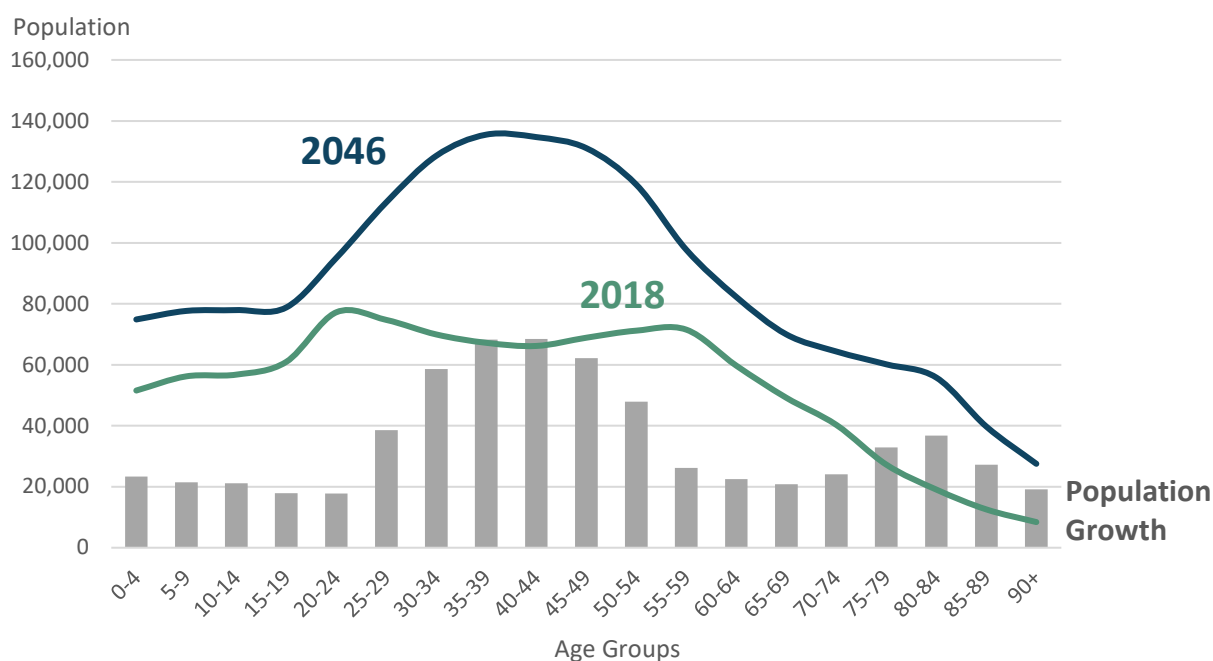
As the Ontario Ministry of Finance now anticipates significantly more population growth in the City of Ottawa, the same approach should be considered when evaluating land needs to 2046. This is consistent with the direction in the PPS, 2024. Therefore, although the City of Ottawa 2019 Growth Forecasts are only five years old, the increase in international migration to Canada and the large share of immigrants settling in Ontario and the Ottawa Region has had a significant impact on population forecasts.

The age distribution of population growth will also have an impact on demand for housing by dwelling type. As shown in Figure 3.2, the population in every 5-year age cohort is anticipated to grow between 2018 and 2046, based on the population forecasts prepared by the Ontario Ministry of Finance. However, the 30 to 49 age cohort is anticipated account for an out-sized share of population growth. As will be discussed in the next section, housing type propensities prepared by the City as part of the City of Ottawa 2019 Growth Forecasts show that demand for single-detached and row units starts to increase in the 30 to 34 age group before peaking in the 55 to 59 age group.



Figure 3.2

## City of Ottawa Population by Age Group, 2018 and 2046



Source: Parcel based on Statistics Canada and Ontario Ministry of Finance.

## Housing Growth Forecasts

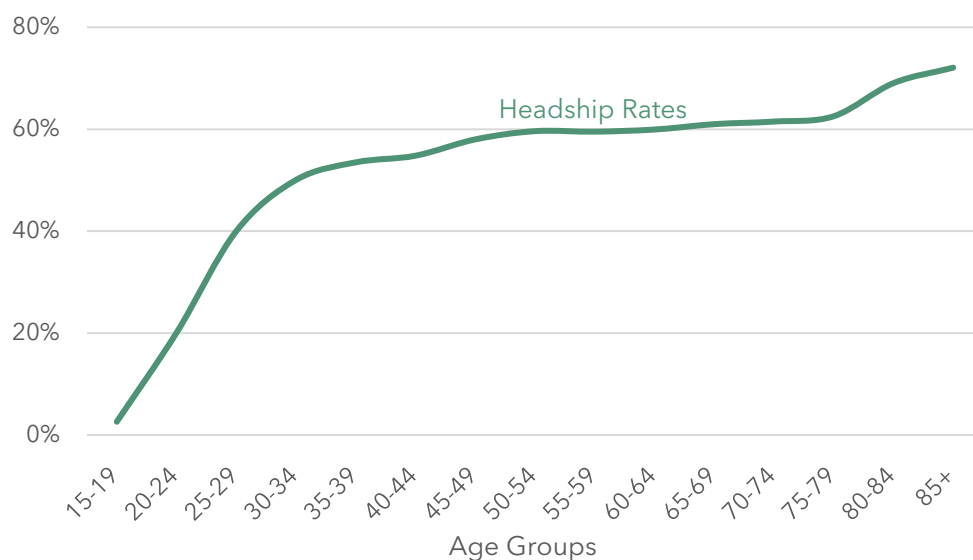
In forecasting dwelling unit growth in the City of Ottawa between 2018 and 2046, we have relied on the headship rate methodology.<sup>2</sup> This is consistent with the methodology used in the City of Ottawa 2019 Growth Forecasts, which applies headship rates by five-year age cohort to the population forecasts to determine total household growth. Figure 3.3 shows headship rates in Ottawa, which were taken from Appendix 4 of the City of Ottawa 2019 Growth Forecasts. As shown, headship rates increase significantly in the age 20 to 34 cohort, then grow more slowly in the age 35 to 79 cohort.

<sup>2</sup> Headship rates are defined as the share of the population by age cohort that are considered the "head of the household"

Figure 3.3

## City of Ottawa Headship Rates, 2016

Share of Population in Private Households that are Household Maintainer



Source: Parcel based on Growth Projections for the New Official Plan: Methods and Assumptions for Population, Housing and Employment, 2018 to 2046, Appendix 4

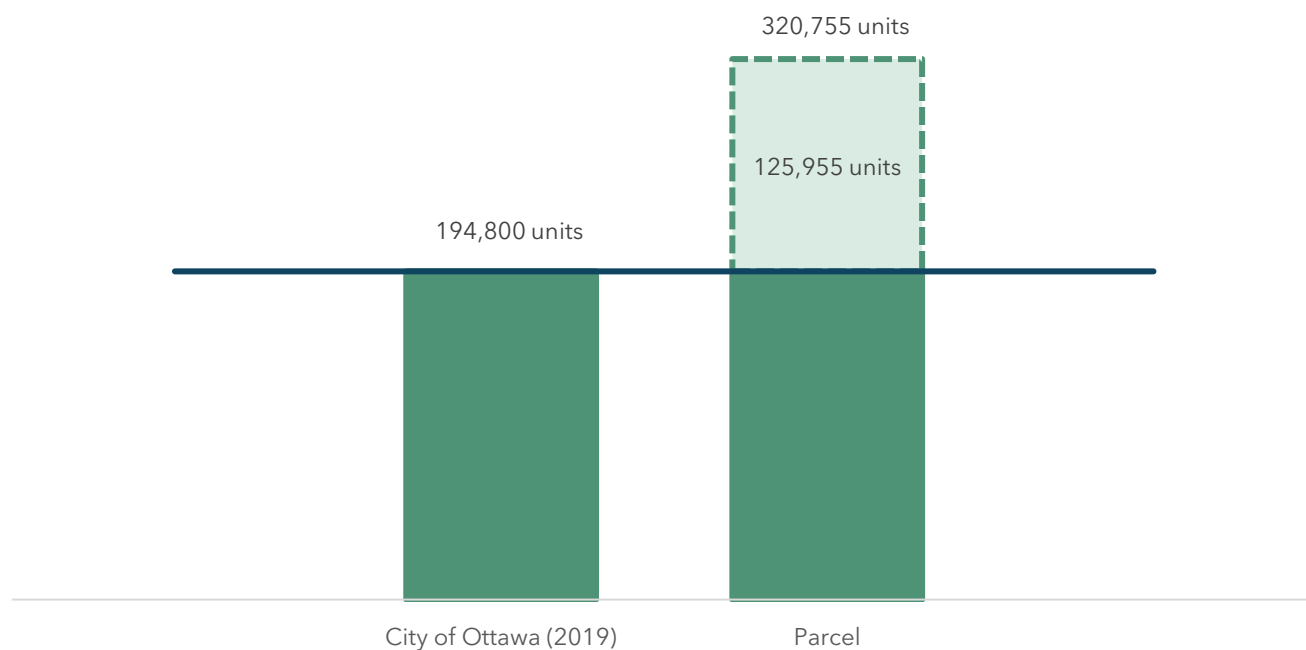
In addition to applying these same headship rates to the Ontario Ministry of Finance forecasts, consistent with the approach used in the City of Ottawa 2019 Growth Forecasts, we have also applied an adjustment factor to account for the demolitions and vacancies.<sup>3</sup> Therefore, the only difference between the forecasts prepared by the City of Ottawa in 2019 and our forecasts are the use of the Ontario Ministry of Finance Fall 2024 forecasts, which now anticipate that Ottawa will grow to 1.66 million persons by 2046.

Based on our analysis, **the City of Ottawa would need to accommodate 320,755 new dwelling units between 2018 and 2046, approximately 125,955 households more than forecast in the City of Ottawa 2019 Growth Forecasts.** Therefore, the City of Ottawa will need substantially more housing to accommodate growth to 2046 than was previously anticipated in the GMS.

<sup>3</sup> The City of Ottawa 2019 Growth Forecasts assume a factor to allow for a vacancy rate in rental and ownership units and to replace demolished units of the same type. The same factors have been applied in our analysis.

Figure 3.4

## City of Ottawa Dwelling Unit Growth Forecasts, 2018-2046

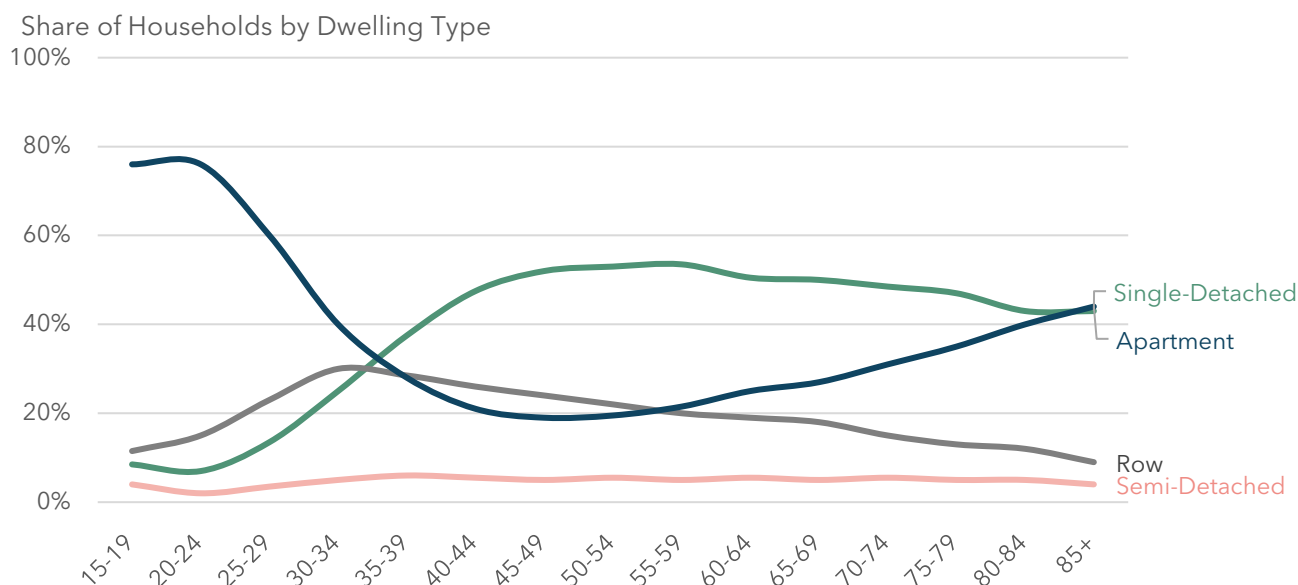


Source: Parcel based on Growth Projections for the New Official Plan: Methods and Assumptions for Population, Housing and Employment 2018 to 2046, prepared in November 2019.

We have also applied the dwelling type propensities by age cohort that were utilized in the City of Ottawa 2019 Growth Forecasts to determine demand for housing by age group and dwelling type (single-detached, semi-detached, row and apartment units). As noted earlier, these propensities anticipate that demand for single-detached and row units will start to increase in the 30 to 34 age group before peaking in the 55 to 59 age group. In the age 60 and over cohort, demand for apartment units begins to increase, with a corresponding decline in demand for single-detached and row units.

Figure 3.5

## City of Ottawa Housing Type Propensities by Age Group, 2016

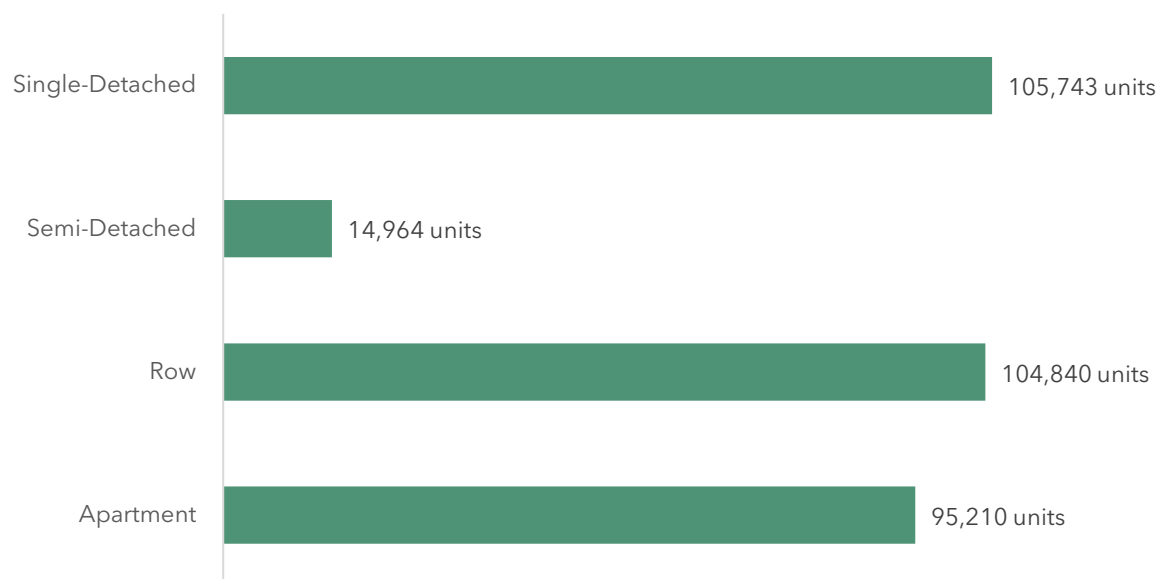


Source: Parcel based on Growth Projections for the New Official Plan: Methods and Assumptions for Population, Housing and Employment 2018 to 2046, prepared in November 2019.

As shown, applying the housing type propensities by age group in Figure 3.5 to household growth by dwelling type and accounting for demolitions and vacancies results in unit growth projections by dwelling type in Figure 3.6. As shown, unit growth by dwelling type is relatively evenly distributed between single-detached, row and apartment units.

Figure 3.6

## City of Ottawa Unit Growth by Dwelling Type, 2018 to 2046



Source: Parcel.

# 4.0

## **Land Needs Assessment**



## 4.1 Housing Unit Supply

At the time the GMS was prepared, the most recent land supply information available was the Vacant Urban Residential Land Survey, 2018 Update (the “2018 VURLS”), July 2019. This land supply information was used in the GMS to establish the Urban Area boundary expansion. As noted in the GMS, the unit supply information contained in the 2018 VURLS was updated by adding back the housing starts occurring between July 1 and December 31, 2018, units under construction on June 30, 2018 and the addition of a development parcel South Nepean based on Official Plan Amendment #212 and approvals from the Rideau Valley Conservation Authority.

Figure 4.1 summarizes the unit supply information for the Rural Area and Greenfield Area, as contained in the GMS. It is notable that an estimate of unit supply capacity within the Built-up Area, by unit type, is not provided in the GMS. Figure 19 of the GMS notes a unit capacity of 13,600 units within the Rural Area, which includes the Villages, Country Lot Subdivisions and Rural Remaining. Figure 24 of the GMS estimates the remaining supply of units in the Greenfield Area as 66,300, with about 42% of these units being single-detached. This Greenfield Area land supply information is utilized in the following section to establish land needs to support household growth to 2046.

Figure 4.1

### City of Ottawa Housing Unit Supply, Mid-2018, Rural Area and Greenfield Area

	Single-Detached	Semi-Detached	Row	Apartment	Total
Rural Area	12,000	200	900	500	13,600
Greenfield Area	27,900	1,400	30,400	6,600	66,300
Sub-total	39,900	1,600	31,300	7,100	79,900

Source: Parcel based on Residential Growth Management Strategy for the New Official Plan, March 2020.

## 4.2 Land Needs Assessment

Based on the Ontario Ministry of Finance population projections for the City of Ottawa and the Greenfield Area unit supply, we have considered the need for an Urban Boundary expansion to accommodate demand to 2046. In estimating residential land needs, we have relied on the approach utilized by the City in the GMS. Assumptions utilized in our analysis include:

- **Household Growth in the Rural Area** – We have continued to assume 13,000 units would be accommodated within the Rural Area to 2046. This is consistent with the land supply information summarized in Figure 4.1, which estimate a Rural Area unit capacity of 13,600 units.
- **Intensification Target** – Our LNA assumes an intensification target of 51% for units accommodated within the Urban Area, consistent with Policy 3.2.1 of the new City of Ottawa Official Plan.
- **Residential Densities** – We have utilized net residential densities of 25 units per hectare (“uph”) for single-detached units, 35.6 uph for semi-detached units, 50.6 uph for row units and 92.4 uph for apartment units. This is consistent with the densities assumed in the GMS.
- **Net-to-Gross Ratio** – We have utilized a 50% net to gross ratio for land, consistent with the ratio used in the GMS and also consistent with the direction in the Land Needs TOR.

Based on these assumptions, we arrive at an estimated need to expand the Ottawa Urban Boundary to accommodate **an additional 4,500 gross hectares**. This is **3.5x larger** than the 1,281-hectare expansion identified in the City of Ottawa GMS.

Figure 4.2

## Land Needs Assessment - Update

	Single-Detached	Semi-Detached	Row	Apartment	Total
<b>City-wide Demand</b>	105,743	14,964	104,840	95,210	320,757
Rural Demand	11,500	200	900	400	13,000
Urban Demand	94,243	14,764	103,940	94,810	307,757
<b>Built-up Area</b>					
Built-up Area Share	21%	4%	29%	45%	50.7%
Built-up Area Demand	33,420	6,700	45,770	70,021	155,910
<b>Greenfield</b>					
Greenfield Demand	60,824	8,064	58,171	24,789	151,847
Greenfield Supply	27,900	1,400	30,400	6,600	66,300
Shortfall in Greenfield Units	32,924	6,664	27,771	18,189	85,547
Unit Density (uph)	25.0	35.6	50.6	92.4	
Net Expansion Area	1,317	187	549	197	2,250
<b>Net to Gross</b>					50%
<b>Gross Land Area Required (ha)</b>					4,500

Source: Parcel

This baseline scenario satisfies the direction in Section 3 of the new Official Plan, that at least 10% of dwellings in the Suburban Transect will be in the form of apartment units. As shown in Figure 4.2, approximately 16% of Greenfield Area demand is anticipated to be for apartment units. Further, Table 3b in the new Official Plan identifies a density target of 40 to 60 dwellings per net hectare in the Suburban Transect, while item e) in the Land Needs TOR states that for residential development within the urban expansion areas, a minimum density of 36 units per hectare should be considered.

**As shown in Figure 4.2, within the expansion area, the 85,547 units will be accommodated on 2,250 net hectares of land, or a density of 38 units per net hectare. This density exceeds the density identified in item e) of the Land Needs TOR.**

However, we consider our estimated land needs to be very conservative, as it utilizes a BUA unit distribution that is consistent with the City of Ottawa GMS. Even with the addition of 4,500 hectares, this scenario requires the City to accommodate approximately 40,120 single and semi-detached units within the BUA of the municipality. To put this in perspective, the “no expansion scenario” included in the GMS estimated the need to accommodate 31,400 single and semi-detached units within the BUA. In the GMS, the City reached the conclusion that:

*The No Expansion scenario is an extremely ambitious and unlikely scenario. Although it meets the Official Plan growth management policy direction of achieving the majority growth through intensification the scenario is too ambitious within the time period of the new Official Plan to accommodate the number of necessary ground-oriented dwellings through intensification. (emphasis added) (p.33)*

Therefore, allocating an even larger number of single and semi-detached units to the BUA in comparison to the “no expansion scenario” is not reasonable. To achieve the 51% intensification target, the city will need to shift a larger share of apartment growth to the BUA, or consider a lower intensification target.

## 4.3 15-Year Supply of Greenfield Area Land

Section 3.1 of the City of Ottawa Official addresses the sufficiency of land to accommodate growth. Policy 3.1.5) states:

- 5) *The identification of new or additional urban area, and new or additional village area, may only occur through a comprehensive review in accordance with the Planning Act and Provincial Policy Statement. Evaluation of lands for potential expansion of the settlement area may include, but are not necessarily limited to, the following considerations:*

- a) *That there are insufficient opportunities within the urban area and villages to accommodate a 15-year supply of market-based residential development;*

As part of Greenfield Residential Land Survey, completed annually by the City of Ottawa, the sufficiency of Greenfield Area lands is monitored. The Greenfield Residential Land Survey, Mid-2022 Update states:

*The Provincial Policy Statement requires a minimum of 15-year supply of residential land to be maintained at all times. To assess how projections are tracking with this policy, land demand from the projected private market housing demand in the “Balanced Scenario” from the RGMS for the New Official Plan is compared with actual land consumption. (page 8)*

Page 10 of the Greenfield Residential Land Survey, Mid-2022 Update identifies that based on land within the existing designated greenfield supply there is a projected supply of 15.9 years, while the City adopted expansion lands add 9.4 years of supply, for a total supply of 25.3 years.

However, as noted above, the years of supply estimated in the Greenfield Residential Land Survey, Mid-2022 Update is based on the balanced scenario for housing demand projections prepared as part of the GMS. The demand projections in the GMS forecast the need for an additional 3,446 units per year in the Greenfield Area, resulting in absorption of 93.1 hectares per year. As shown in Figure 4.3, this results in 15.9 years of Greenfield Area supply. Adjusting for the 2.2 years that have passed since the last update results in 13.7 years of supply, which is below the 15-year supply target.

Figure 4.3

## Greenfield Area Years of Supply, October 1, 2024, Ottawa Growth Forecasts

	Single-Detached	Semi-Detached	Row	Apartment	Total
Average Annual Housing Demand (2022-2037)	1,468 units	72 units	1,582 units	323 units	3,445 units
Density (units per hectare)	26.3 uph	33.5 uph	49.7 uph	98.2 uph	
Land Needs (net hectares)	55.8 ha	2.1 ha	31.8 ha	3.3 ha	93.1 ha
Existing Greenfield Residential Land Supply (Mid-2022)					1,482.2 ha
Years of Supply (mid-2022)					<b>15.9 years</b>
Years Since Land Greenfield Residential Land Supply was Completed <sup>1</sup>					<b>2.2 years</b>
<b>Remaining Years of Supply - October 1, 2024</b>					<b>13.7 years</b>

<sup>1</sup> Amount of time that has passed between July 1, 2022 and September 30, 2024.

Source: Parcel based on Greenfield Residential Land Survey, Mid-2022 Update, December 2023.

In addition to the Existing Greenfield Residential Land Supply, there are 640.5 net hectares of land located within the Council Adopted Expansion Areas added in 2021. However, based on a staff report from October 16, 2024<sup>4</sup>, some of these lands have yet to begin the secondary planning exercises and none have completed a secondary planning exercise.

*Of the expansion areas, 96 per cent (1,224 hectares) have either formally commenced or are preparing to begin their secondary planning exercises and represent the next phases to augment the 15-year minimum supply. (page 7)*

The 2021 Expansion Areas do not meet the definition of designated and available in the PPS, 2024, which states:

*Designated and available: means lands designated in the official plan for urban residential use. For municipalities where more detailed official plan policies (e.g., secondary plans) are required before development applications can be considered for approval, only lands that have commenced the more detailed planning process are considered to be designated and available for the purposes of this definition.*

Therefore, these lands have not been included in determining the sufficiency of the 15-year supply of Greenfield Area lands.

Based on Greenfield Area demand projections summarized in Figure 4.2 of our Land Needs Assessment, which utilizes the Fall 2024 Ministry of Finance Ontario Population Projections, the City is expected to see growth of 5,423 units per year in the Greenfield Area, or 142 hectares per year, as shown in Figure 4.4.

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<sup>4</sup> Subject: New Urban and Village Boundary Expansion Official Plan Application Process; File Number: ACS2024-PDB-PS-0102.

Figure 4.4

## Greenfield Area Years of Supply, October 1, 2024, Parcel Forecasts

	Single-Detached	Semi-Detached	Row	Apartment	Total
Housing Demand Forecast (2018-2046) <sup>1</sup>	60,824 units	8,064 units	58,171 units	24,789 units	151,848 units
Average Annual Housing Demand	2,172 units	288 units	2,078 units	885 units	5,423 units
Density (units per hectare) <sup>2</sup>	26.3 uph	33.5 uph	49.7 uph	98.2 uph	
Land Needs (net hectares)	82.6 ha	8.6 ha	41.8 ha	9.0 ha	142.0 ha
Existing Greenfield Residential Land Supply (Mid-2022)					1,482.2 ha
Years of Supply (mid-2022)					<b>10.4 years</b>
Years Since Land Greenfield Residential Land Supply was Completed <sup>3</sup>					<b>2.2 years</b>
<b>Remaining Years of Supply - October 1, 2024</b>					<b>8.2 years</b>

<sup>1</sup> Housing demand forecasts based on Ontario Ministry of Finance Fall 2024 Population Projections.

<sup>2</sup> Based on Greenfield Residential Land Survey, Mid-2022 Update, December 2023, page 8.

<sup>3</sup> Amount of time that has passed between July 1, 2022 and September 30, 2024.

Source: Parcel based on Greenfield Residential Land Survey, Mid-2022 Update, December 2023.

As shown in Figure 4.4, based on annual absorption of 142.0 hectares per year, the Existing Greenfield Residential Land Supply contained approximately 10.4 years of supply as of mid-2022, which is below 15-years of supply target. However, similar to the analysis above, it is important to note that the land supply is from mid-2022 and over two years has passed since the last update. Adjusting for the 2.2 years that have passed since the last update results in 8.2 years of supply, which is well below the 15-year supply target.

Similarly, we have considered the impact of the Council Adopted Expansion Areas added in 2021. Based on the Greenfield Area demand projections summarized in Figure 4.2 of our Land Needs Assessment, the Council Adopted Expansion lands represent 4.5 years of supply and would still fall short of the 15-year supply target, as they would only represent a 12.7-years supply when considered in conjunction with the Existing Greenfield Residential Land Supply.

# 5.0

## **Conclusions and Summary**

## 5.1 Conclusions

The forecasts prepared by the City of Ottawa in 2019 are now outdated and do not reflect current demand for housing. Based on Policy 2.1.1 of the PPS, 2024, planning authorities are now directed to base population and employment projections on forecasts published by the Ontario Ministry of Finance. The most recent forecasts from the Ontario Ministry of Finance in Fall 2024 now anticipate 1.66 million people in Ottawa by 2046.

Based on recent forecasts prepared by the Ontario Ministry of Finance in Fall 2024 and utilizing the same land needs assessment approach that was taken by the City as part of the GMS, the City needs to expand the Urban Boundary to accommodate at least an additional 4,500 gross hectares. This is 3.5x larger than the 1,281-hectare expansion identified in the City of Ottawa GMS. This scenario would still achieve policy objectives for at least 10% of units in the Suburban Transect to be in the form of apartments and to also come close to achieving a net density of 40 to 60 units per net hectare.

The South March lands, which collectively comprise 233 hectares, will be important in addressing this forecast shortfall, as they were one of the highest scoring expansion areas considered as part of the new City of Ottawa Official Plan.

## 5.2 Summary of Evaluation Criteria in Land Needs TOR

The following section reiterates the six items identified for the Land Needs TOR and how these key topics are addressed by Parcel in this Land Needs Assessment report.

- a) ***The need to designate and plan for additional land to accommodate an appropriate range and mix of land uses***

### **Parcel Response**

As identified in Figure 4.2, based on population projections contained in the Ministry of Finance Fall 2024 Ontario Population Projections and applying headship rates and dwelling type propensities contained in the City of Ottawa 2019 Growth Forecasts, there is a need to expand the settlement area boundary in Ottawa to accommodate an additional 4,500 gross hectares of lands for residential uses to 2046.



**b) The new or expanded settlement area provides for the phased progression of urban development**

**Parcel Response**

This item in the Land Needs TOR is consistent with policy 2.3.2 1) g) of the PPS, 2024. The following addresses how the South March Cluster represents a phased and logical progression of urban development from a transportation, infrastructure and land use perspective. This analysis has relied on the *Public Rationale & Public Consultation Strategy*, October 21, 2024, prepared by Novatech, the *Servicing Capacity Assessment*, October 23, 2024, prepared by Novatech and the *Transportation Capacity Assessment*, October 22, 2024, prepared by Novatech.

**Transportation**

The *Transportation Capacity Assessment* identified that the South March Cluster has good access to the planned park and ride lot and future Bus Rapid Transitway ("BRT") along March Road with a planned transit station at the southern boundary of the South March Cluster.

As it relates to future transit infrastructure, the *Transportation Capacity Assessment* notes that the South March Cluster is a logical extension of the Kanata North Transitway to continue up March Road. The inclusion of the South March Cluster within the Ottawa Urban Area boundary would also support planned transportation improvements, including the Kanata North Transitway, which the Province of Ontario will be committing up to \$80 million (one-third of the eligible capital costs).

The South March Cluster will also be served by active transportation options. The cross sections for March Road as illustrated in the Kanata North Community Design Plan will include unidirectional cycle tracks that would logically be extended north through the South March Cluster, providing alternative modes of transportation. The formerly active Beachburg Rail Corridor which forms the eastern boundary of the South March Cluster is identified as a Major Pathway as per Official Plan Schedule C8 – Active Transportation Network Rural Cycling Routes. This provides an alternate form of pedestrian and cycling access.

Further details that support how the South March Cluster is a logical extension of transportation infrastructure are detailed in the *Transportation Capacity Assessment* which accompanied this submission.

**Water and Sewer Infrastructure**

As summarized in the *Servicing Capacity Assessment*, the location of the South March Cluster abutting the existing Kanata North Urban Expansion Area to the south enables the logical integration of sewage, water, and stormwater infrastructure to maximize the efficiency of planned municipal infrastructure and services. The *Servicing Capacity Assessment* notes that no major or foundation infrastructure

components are required to be upgraded in order to accommodate the addition of the South March Cluster. As the South March Cluster is adjacent to existing water, sewer and stormwater infrastructure and major upgrades are not required for this infrastructure, the lands represent a logical and phased progression of urban development.

## **Community Infrastructure**

The South March Cluster is in proximity to several amenities, including shopping, employment centres, recreational facilities and emergency services, including those located in the Kanata North Urban Expansion Area. Therefore, the phased progression of urban development in the South March Cluster will make more efficient use of this community infrastructure.

Furthermore, the Kanata North Community Design Plan includes four (4) future schools as part of the Kanata North Urban Expansion Area. It is anticipated that through the Local Plan/Secondary Plan process for the South March Cluster, school boards will be engaged and consulted on the various requirements for future institutional facilities.

## **Land use**

As summarized above, the South March Cluster represents the most logical and suitable candidate location for settlement boundary expansion given the previous recommendation to designate these lands as Category 1 lands based on the scoring by City staff using the evaluation criteria for urban expansion and the updated assessment undertaken as part of this Official Plan Amendment application.

City staff previously recommended, as part of the New Official Plan in 2021, the designation of the South March Cluster as “Category 1” lands based on the total scoring using the evaluation criteria. Category 1 lands demonstrated strong adherence to the Residential Growth Management Strategy for the New Official Plan and Five Big Moves.

The proposed Official Plan Amendment to add the South March Cluster to the urban expansion area will build upon the previously City Council approved Kanata North Community Design Plan. The South March Cluster lands can use the infrastructure and services planned and provided in the Kanata North Urban Expansion Area such as the transit park and ride facility, commercial development, terminus transit station located at the boundary between the South March Cluster and the Kanata North Urban Expansion Area, watermain and sanitary services constructed within the Kanata North Urban Expansion Area, watermain upgrades in March Road, parks and schools planned to be constructed. The South March Cluster represent a logical boundary expansion that provides for the phased progression of urban development.

- c) *That there are insufficient opportunities within the urban and all village areas to accommodate a 15-year supply of market-based residential development***

## **Parcel Response**

As noted in Section 4.3, using household growth forecasts contained in the City of Ottawa Official Plan, as of October 1, 2024, the Greenfield Area is estimated to have a 13.7-year supply of vacant land available for development. We have excluded the Council Adopted Expansion Areas added in 2021, as some of these lands have yet to begin the secondary planning exercises and none have completed a secondary planning exercise. Therefore, they do not meet the definition of designated and available in the PPS, 2024.

We have conducted a similar analysis using household growth forecasts that are based on the Fall 2024 Ontario Population Projections prepared by the Ministry of Finance. Based on these household growth forecasts, the Greenfield Area is estimated to have an 8.2-year supply of vacant land available for development. Even excluding the Council Adopted Expansion lands, which we maintain is inappropriate, there would only be a 12.7-years supply.

- d) *That there are insufficient opportunities to accommodate projected employment and other land uses***

## **Parcel Response**

The need for employment and other land uses was not considered as part of our Land Needs Assessment, as the South March lands are only considering residential uses.

- e) *Net residential densities shall strive to approach the densities of the Inner Urban Transect over time, but residential development within the urban expansion areas, shall plan for a minimum density of 36 units per net hectare and permit density increases through intensification and accessory dwelling units***

## **Parcel Response**

As shown in Figure 4.2, within the expansion area, the 85,547 units will be accommodated on 2,250 net hectares of land, or a density of 38 units per net hectare. This density exceeds the density identified in the Land Needs TOR.

## **Net Residential to Gross Developable Land Ratio**

*The Land Needs Assessment should also consider appropriate net residential-to-gross-developable land ratios or alternate means of determining the total community land need. “Net residential” refers to the portion of a future neighbourhood with residential uses, and “gross developable land” refers to the developable lands of a future neighbourhood to support the proposed residential uses, including but not limited to roads, transit-related areas, active transportation connections, parks, schools, community amenities, and commercial services. For example, a 50 per cent ratio means that for a proposed parcel with 100 developable hectares, 50 hectares are required for the proposed residential lots and blocks and 50 hectares are required for the other supporting uses above. At a minimum, a scenario of a 50 per cent ratio should be used, but other ratios or methods may also be presented as alternate scenarios along with justification.*

## **Parcel Response**

As noted in Figure 4.2, we have utilized a 50% ratio for net residential-to-gross-developable land. This is the ratio identified in the Land Needs TOR and is consistent with the GMS.



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