

Edmonton's Developing Neighbourhoods Under Construction: 2009

As of December 2009 there were 45 neighbourhoods under construction in Edmonton's developing areas (see Table 1), which represents three more than at year's end in 2008. In 2009 one neighbourhood was "completed" in terms of single-family lot registrations, *Charlesworth* in the southeast, and four new neighbourhoods were added: *Albany* and *Rapperswill* in the north, *Rosenthal* in the west, and *Heritage Valley Town Centre* in the Southwest. The number of neighbourhoods under construction is determined by tracking single-family lot registration within suburban neighbourhoods. Single-family development is used as it is the most consistent measure of the rate of development and land consumption. Once a single family lot has been registered and therefore legally available to be built on, it is considered to be absorbed, as construction generally follows registration within one to two years.

The count of 45 neighbourhoods under construction in Edmonton's developing areas does not include those neighbourhoods where 95 percent or more of single family lots have been registered. Neighbourhoods at this stage are considered to be complete, and have been greyed out in Table 1. The total does, however, include ten neighbourhoods which have been approved for development but had yet to experience any single-family lot registration by the end of 2009. These neighbourhoods are: *Crystallina Nera*, *Rapperswill* and *Albany* in the North, *Ebbers* in the Northeast, *The Orchards* in the Southeast, *Heritage Valley Town Centre* and *Chappelle* in the Southwest, and *Stewart Greens*, *Granville* and *Rosenthal* in the West. Assuming typical market conditions, it is expected that these neighbourhoods will begin to experience development in 2010-2011.

Of the 45 neighbourhoods under construction, 23 neighbourhoods are 50 percent or more complete. Completion varies considerably by city sector. In the North sector all neighbourhoods under construction are either more than 50 percent or have yet to experience any development. In the Southeast, by contrast, three out of five neighbourhoods under construction are at their beginning stages of development (see Appendix 1).

Table 2 shows the land supply remaining within approved Area Structure Plans, by sector, based on average annual absorption rates calculated over a ten year period. Lot absorption rates vary significantly from one sector of the city to another. The Northeast has the lowest average absorption rate at 339 lots per year. The Southwest has the highest rate at 1,043 lots per year. The ten-year running average is reflective of market variations and economic cycles which occur over a decade of growth. Land supply remaining in approved Area Structure Plans ranges from a high of 26 years in the West sector to a low of 8 years in the North sector.

The lot supply in approved plan areas (Table 2) is greater than the number of lots remaining in neighbourhoods under construction (Table 1) because the former represents all single-family development potential within adopted Area Structure Plan while the latter is restricted to capturing development potential within approved Neighbourhood Structure Plans.

Table 1: Neighbourhoods Under Construction, December 2009

NORTH

ASP	Neighbourhood	Year Approved	Single Family Lots Projected	Remaining Potential SF Lots	% of Single Family Lots Completed
Castle Downs Extension	Chambery	1985	708	81	89
	Canossa	1984	1,368	336	75
	Elsinore	1985	778	97	88
	Rapperswill	2009	908	908	0
Lake District	Belle Rive	1982	1,147	61	95
	Crystallina Nera	2007	1,128	1,128	0
	Eaux Claires	1983	708	30	96
	Klarvatten	1984	1,561	317	80
	Mayliewan	1985	1,202	35	97
	Ozerna	1981	1,193	88	93
	Schonsee	2002	935	294	69
	Lago Lindo	1980	1,155	0	100
The Palisades	Albany	2009	187	187	0
	Carlton	1999	1,225	473	61
	Cumberland	1984	1,603	0	100
	Hudson	1997	628	209	67
	Oxford	1985	839	0	100

NORTHEAST

ASP	Neighbourhood	Year Approved	Single Family Lots Projected	Remaining Potential SF Lots	% of Single Family Lots Completed
Clareview	Clareview Campus	1980	271	35	87
	Fraser	1984	1,192	381	68
Pilot Sound	Brintnell	2001	1,287	80	94
	Hollick Kenyon	1991	1,377	0	100
	Matt Berry	1988	1,247	16	99
	McConachie	2006	2,082	1,903	9
Miller NASP	Miller	1995	810	0	100
Ebbers NASP	Ebbers	2006	208	208	0

SOUTHEAST

ASP	Neighbourhood	Year Approved	Single Family Lots Projected	Remaining Potential SF Lots	% of Single Family Lots Completed
Ellerslie	Ellerslie	2001	1,218	37	97
	Summerside	1999	3,662	1,368	63
	The Orchards	2007	2,505	2,505	0
Meadows	Larkspur	1987	1,135	0	100
	Laurel	2007	3,054	2,815	8
	Tamarack	2006	1,866	988	47
	Silver Berry	1994	1,286	0	100
	Wild Rose	1988	1,546	0	100
Southeast	Charlesworth	2005	826	10	99
	Walker	2007	2,864	2,446	15

SOUTHWEST

ASP	Neighbourhood	Year Approved	Single Family Lots Projected	Remaining Potential SF Lots	% of Single Family Lots Completed
Heritage Valley	Allard	2007	1,509	1,452	4
	Blackmud Creek	1998	635	0	100
	Callaghan	2005	801	524	35
	Chappelle	2008	3,863	3,863	0
	Heritage Valley Town Centre	2009	150	150	0
	MacEwan	2001	1,118	78	93
	Richford	1999	327	198	39
	Rutherford	2001	2,589	171	93
Terwillegar	Haddow	1993	895	0	100
	Hodgson	1995	731	6	99
	Leger	1995	831	0	100
	MacTaggart	2005	948	422	55
	Magrath	2003	1,145	427	63
	South Terwillegar	2003	1,965	154	92
	Terwillegar Towne	1995	2,082	0	100
Windermere	Ambleside	2005	1,446	609	58
	Windermere Estates	2006	2,270	1,520	33

WEST

ASP	Neighbourhood	Year Approved	Single Family Lots Projected	Remaining Potential SF Lots	% of Single Family Lots Completed
Big Lake	Trumpeter (Big Lake N. 1)	2008	969	838	14
The Grange	Hamptons	1998	2,740	338	88
	Glastonbury	1998	1,454	106	93
	Granville	2007	927	927	0
Cameron Hts.	Cameron Heights	2001	883	526	40
Lewis Farms	Breckenridge Greens	1991	427	0	100
	Potter Greens	1990	713	184	74
	Rosenthal	2009	2,316	2,316	0
	Suder Greens	2002	1,147	148	87
	Secord	2007	2,339	2,175	7
	Stewart Greens	2007	592	592	0
	Webber Greens	2000	605	539	11
West Jasper Place	Donsdale	1995	518	106	80
	Jamieson Place	1980	773	0	100
	Ormsby Place	1986	420	0	100
	Wedgewood Hts	1986	453	0	100

Table 2: Lot Supply in Approved Area Structure Plans 2009

Lot Supply in Approved Area Structure Plans 2009 Ten Year Running Average

North Sector	
(single family dwellings)	
Potential Lot Supply:	5,150
Year Supply:	8
Average Absorption 2000-2009	624

NOTES:

Potential Lot Supply means the estimated future number of single family lots within approved ASPs or SCDBs. Once a lot has been registered it is considered absorbed.

Northeast Sector	
(single family dwellings)	
Potential Lot Supply:	3,483
Year Supply:	10
Average Absorption 2000-2009	339

An Area Structure Plan (ASP) is a plan approved by City Council which, according to provincial legislation, must describe proposed land uses, sequence of development, density of proposed population, and general location of major transportation routes and public utilities for a number of neighbourhoods.

Southeast Sector	
(single family dwellings)	
Potential Lot Supply:	16,497
Year Supply:	20
Average Absorption 2000-2009	805

Once an ASP has been approved by City Council, individual neighbourhoods within the approved ASP must also be approved prior to commencement of development.

Numbers are subject to change.

Southwest Sector	
(single family dwellings)	
Potential Lot Supply:	20,710
Year Supply:	20
Average Absorption 2000-2009	1,043

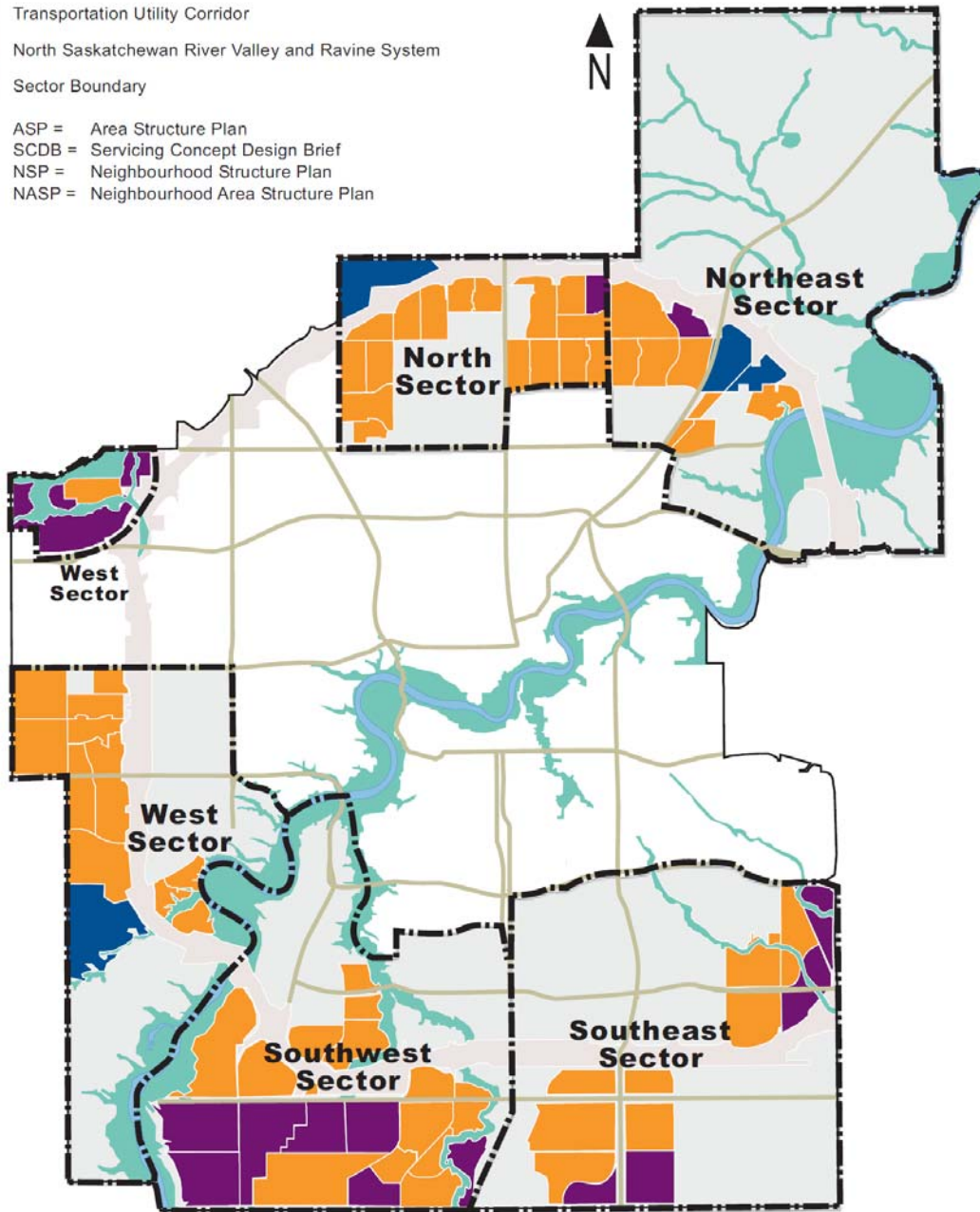
West Sector	
(single family dwellings)	
Potential Lot Supply: ^	14,164
Year Supply:	26
Average Absorption 2000-2009	555

City-wide lot supply remaining	60,004
Average city-wide absorption	3,365
City-wide years of supply	18

Map 1: Edmonton's Developing and Planned Neighbourhoods by City Sector 2009

- Developing Neighbourhoods (NSP approved)
- Planned Neighbourhoods (ASP or SCDB approved, No NSP & No Development)
- Plan Under Preparation (No ASP, SCDB or NASP)
- Main Arterial Roads
- Transportation Utility Corridor
- North Saskatchewan River Valley and Ravine System
- Sector Boundary

ASP = Area Structure Plan
 SCDB = Servicing Concept Design Brief
 NSP = Neighbourhood Structure Plan
 NASP = Neighbourhood Area Structure Plan



FOR INFORMATION PURPOSES ONLY
 January 2010