Edmonton's Developing Neighbourhoods: 2018 Low Density Lot Registration Report

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1.0 INTRODUCTION

This report measures the absorption and supply of residential land in developing and planned neighbourhoods based on lot registrations. The number of lot registrations shows the level of neighbourhood completion as directed in *Section 3.1.1.4 of the Municipal Development Plan (MDP), The Way We Grow*. Land supply is measured by comparing the current absorption and potential capacity within approved Area Structure Plans (ASPs).

1.1 LOW DENSITY RESIDENTIAL LOT REGISTRATION

Low density residential (LDR) development is used as a consistent measure of the rate of development and land consumption. Low density residential development includes single and semi-detached lots, and excludes country residential. Once a low density lot has been registered at Land Titles, it is legally available to be built on and therefore considered absorbed. Potential lot supply means the estimated number of low density residential lots within approved Area Structure Plans (ASP) or Servicing Concept Design Briefs (SCDB) that have not yet been registered. Amendments to an approved Neighbourhood Area Structure Plan (NASP) or Neighbourhood Structure Plan (NSP) may include: adding additional land to the neighbourhood, rezoning of parcels, or updating the plan to meet new density requirements.

The objective of this report is to show where current growth is taking place. This understanding is particularly relevant in terms of the Growth Coordination Strategy's policy to focus land development activity and infrastructure provision on approved and developing neighbourhoods to ensure their timely completion and the provision of the full range of services to their residents (*see Section 3.1.1.3, 'The Way We Grow'*). For that reason, remaining supply is provided for planned and developing neighbourhoods in approved Area Structure Plans.

As of December 2018 the potential low density residential lot supply that was available in approved ASPs was 98,440 (see *Table 1: Total Low Density Residential Supply by City Sector*) as per data downloaded from the *Lot Registration Dashboard*. The Southeast sector had the highest residential lot supply potential at 30,195 representing 31% while the North had the lowest at 5,003 (indicating 5%) in 2018. Future levels of economic activity and overall demand for housing and its affordability will affect the actual absorption of low density residential lots and lot supply.

Table 1: Total Low Density Residential Lot Supply by City Sector as of December 2018

City Sector	Developing	Planned	95% Complete	Potential Lot Supply
North	4,894	0	109	5,003
Northeast	7,532	12,441	0	19,973
Northwest	3,949	1,639	0	5,588
West	15,120	5,484	60	20,664
Southeast	12,105	18,090	0	30,195
Southwest	17,017	0	0	17,017
Citywide	**60,617**	**37,654**	**169**	**98,440**

Developing neighbourhoods have an approved Neighbourhood Structure Plan and are within an approved Area Structure Plan or Servicing Concept Design Brief. Low density residential development can range from 1% to 94%.

When a developing neighbourhood has more than 95% of the low density residential lots registered, it is considered to be a **complete neighbourhood.**

Note: The NASPs and NSPs of neighbourhoods that are %100 complete and also considered as "Established" neighbourhoods according to the MDP have been excluded from this annual report. This is because the intent of the report is to track and monitor LDR lot registration in developing neighbourhoods. Previous reports showed these neighbourhoods as part of an ASP or SCDB even though they are already complete and established for reference purpose only. Since the focus of the report is on developing neighbourhoods, "Established" neighbourhoods will no more be captured in subsequent annual reports to avoid mix messaging.

Planned neighbourhoods require a Neighbourhood Structure Plan before development can start.

Potential lot supply means the estimated future number of single or semi family (low density) lots within approved Area Structure Plans or Servicing Concept Design Briefs. Once a lot has been registered it is considered absorbed.

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. Once an Area Structure Plan is approved by City Council, individual neighbourhood plans within the approved Area Structure Plan must also be approved prior to commencement of development.

1.2 NEIGHBOURHOOD COMPLETION CITYWIDE

A total of 92 neighbourhoods (planned, developing, and complete) are in approved Area Structure Plans (ASP). Eighty of the neighbourhoods have approved Neighbourhood Area Structure Plans (NASP) or Neighbourhood Structure Plans (NSP). A total of 57 neighbourhoods are currently available for residential construction, while 23 neighbourhoods are considered 95% or more complete.

Tables 2, 3 and 4 detail the level of low density residential lots completion for developing and complete neighbourhoods by ASP/NASP or NSP and by City sectors.

As of December 2018 there were:

- 57 neighbourhoods under development
- 23 neighbourhoods at the 95-100% complete stage, implying that most of the low density residential lots were all absorbed
- 12 neighbourhoods at the planned stage (no approved NSP)

Of the 57 developing neighbourhoods:

- 15 neighbourhoods were less than 25% or between the 0-24% complete stage. Six out of these neighbourhoods had no development started (in relation to low density residential development) yet
- 26 neighbourhoods were between 25-74% complete
- 16 neighbourhoods were 75-94% complete

Table 2: Developing Neighbourhoods in Approved Neighbourhood Structure Plans Low Density Residential Lot Potential as of December 2017

City Sector	Area Structure Plan	Neighbourhood	Year Approved	Low Density Lots Capacity	Remaining Potential Lots (after 2018)	Percent of Lots Completed
North	Castle Downs Extension	Canossa	1984	1,368	408	70%
		Elsinore	1985	1,083	398	63%
	Edmonton North	Crystallina Nera East	2011	870	870	0%
		Crystallina Nera West	2007	1,128	480	57%

		Eaux Claires	1983	879	102	88%
		Schonsee	2002	1,523	450	70%
	Goodrige Corners NASP	Goodridge Corners	2014	1,102	1,102	0%
	Griesbach NASP	Griesbach	2002	2,283	1,084	53%
				10,236	**4894**	
	Fraser NASP	Fraser	1984	1,523	845	46%
Northeast	Pilot Sound	Cy Becker	2012	1,205	457	62%
		Matt Berry	1988	1,247	98	92%
		McConachie	2006	2,854	742	74%
	Horse Hills	Marquis (NBHD2)	2015	5,401	5390	0%
				12,230	**7,532**	
Northwest	Big Lake	Hawks Ridge	2010	1,408	1,040	26%
		Starling	2010	1,189	607	49%
		Trumpeter	2008	1,340	735	45%
		Kinglet Gardens	2016	1,605	1,567	2%
				5,542	**3,949**	
West	Cameron Heights NASP	Cameron Heights	2001	883	126	86%
	Lewis Farms	Rosenthal	2009	2,988	1,882	37%
		Secord	2007	3,044	1,272	58%
		Stewart Greens	2007	669	385	43%
		Suder Greens	2002	1,025	127	88%
	The Grange	Granville	2007	1,175	506	57%
		The Hamptons	1998	3,460	419	88%
	West Jasper Place South	Donsdale	1995	518	48	91%
	Edgemont NASP	Edgemont	2011	3,858	2,821	27%
	Riverview	Uplands (NBHD 1)	2015	2,042	1,728	15%
		River's Edge (NBHD 3)	2015	2,781	2,780	0%
		Stillwater	2016	3,155	3026	4%
				25,598	**15,120**	
Southeast	Ellerslie	The Orchards at Ellerslie	2007	4,264	2,998	31%
		Summerside	1999	4,584	487	89%
	The Meadows	Laurel	2007	3,710	973	74%

		Maple	2010	1,505	982	35%
		Aster	2016	2,179	2,179	0%
		Tamarack	2006	2,226	913	59%
	Southeast	Charlesworth	2005	1377	1030	94%
		Walker	2007	2,903	363	87%
	Decoteau	Decoteau North	2018	2180	2180	0%
				24,928	**12,105**	
Southwest	Heritage Valley (SCDB)	Allard	2007	1,932	800	59%
		Callaghan	2005	905	168	81%
		Cavanagh	2013	1,187	1014	15%
		Chappelle Area	2008	4,511	2,255	50%
		Desrochers Area	2010	785	701	11%
		Graydon Hill	2013	340	87	74%
		Hays Ridge Area	2012	1,242	986	21%
		Heritage Valley Town Centre Area	2009	150	150	0%
		Richford	1999	327	226	36%
		Rutherford	2001	2,815	466	83%
		Paisley	2011	774	180	77%
	Terwillegar Heights (SCDB)	Mactaggart	2005	951	349	63%
		Magrath Heights	2003	997	107	89%
		South Terwillegar	2003	2,493	585	77%
	Windermere	Ambleside	2005	2,117	640	70%
		Glenridding Heights	2011	1069	66	94%
		Glenridding Ravine	2016	2,057	1,807	12%
		Keswick	2010	4,143	3,134	24%
		Windermere	2006	4,214	3296	78%
				33,009	**17,017**	
Citywide				**111,543**	**60,617**	

Table 3: Planned Neighbourhoods (not yet approved) Low Density Lot Potential as of December 2018

City Sector	Area Structure Plan	Neighbourhood	Low Density Lots Capacity	Remaining Potential Lots
Northeast	Pilot Sound	Gorman	321	321
	Horse Hill	Rural North East South Sturgeon (NBHD 1)	2,849	2,849
		Rural North East Horse Hill (NBHDS 3,4,5)	1,293	1,293
			2,873	2,873
			5,105	5,105
			12,441	**12,441**
Northwest	Big Lake	Pintail Landing (NBHD 4)	1,639	1,639
			1,639	**1,639**
West	Riverview	Grandisle (Neighbourhood 4)	1,444	1,444
		White Birch (Neighbourhood 5)	4,040	4,040
			5,484	**5,484**
Southeast	Southeast	Mattson (NBHD 3)	3,393	3,393
	Decoteau	Northwest*	2,709	2,709
		Central*	2,761	2,761
		Southeast*	5,706	5,706
		Southwest*	3,521	3,521
			18,090	**18,090**
Southwest	Heritage Valley (SCBD)	Heritage Valley 14	0	0
			0	**0**
Citywide			**37,654**	**37,654**

**Neighbourhood names in the Decoteau ASP are not official.*

1.3 LEVEL OF NEIGHBOURHOOD COMPLETION BY CITY SECTOR

Refer to Map 1 for each approved Area Structure Plan (ASP), Servicing Concept Design Brief (SCDB), or Neighbourhood Area Structure Plan (NASP). A Neighbourhood Structure Plan must be approved before any development can occur. Neighbourhood completion varies by City sector (See Map 2).

North Sector (19 neighbourhoods):

- All the neighbourhoods in the North Sector have approved NSPs
- 11 neighbourhoods are 95-100% complete
- 5 neighbourhoods range between 25-74% complete
- Goodridge Corners and Crystallina Nera East have yet to experience any development
- Eaux Claires (88%) is the only neighbourhood between the 75-94% development range
- Griesbach had completion level at 52.5%. This is a former military base that is being redeveloped into residential lots

Northeast Sector (12 neighbourhoods):

- 4 neighbourhoods are complete
- 3 neighbourhoods range between 25-74% complete
- Matt Berry neighbourhood has a completion level of 92% and between the 75-94% development range
- Marquis (0.2%) is the only neighbourhood between the 0-24% development range
- Gorman requires an NSP approval as well as Rural North East Horse Hill and Rural North East South Sturgeon that are in the Horse Hills ASP

Northwest Sector (5 neighbourhoods):

- Starling had the most development at 49% complete
- Hawks Ridge and Trumpeter have development at 26% and 45% respectively
- Kinglet Gardens (2.4%) is the only neighbourhood with less than 25% development
- Pintail Landing neighbourhood needs NSP approval

West Sector (18 neighbourhoods):

- 4 neighbourhoods are 95-100% complete
- 4 neighbourhoods have development ranging between 75-94% complete
- 6 neighbourhoods have development ranging between 25-74% complete
- River's Edge has no significant development started yet
- The Uplands has development at 15%
- 2 planned neighbourhoods including Grandisle and White Birch in the Riverview ASP require NSP approval

Southeast Sector (15 neighbourhoods):

- Ellerslie is 100% complete (regarding low density residential development)
- 3 neighbourhoods were between the 75-94% completion stage
- 4 neighbourhoods range between 25-74% complete
- Aster and Decoteau North (NSP approved on September 2018) neighbourhoods have not started development yet
- 5 planned neighbourhoods require NSP approval; 4 of these planned neighbourhoods are in the Decoteau ASP. The remainder, Mattson, is in the Southeast ASP

Southwest Sector (23 neighbourhoods):

- Southwest Edmonton had the highest number of neighbourhoods
- 3 neighbourhoods are 100% complete. Cashman is considered as part of the complete neighbourhoods because there are no low density residential lots planned for development in the NASP.
- 7 neighbourhoods range between 75-94% complete
- 6 neighbourhoods were between the 25-74% completion stage
- 5 neighbourhoods have low density residential development ranging from 11% to 24% complete
- Heritage Valley Town Centre has not started development
- 1 neighbourhood (Heritage Valley 14) requires NSP approval. However, this has no planned low density residential lots in the Heritage Valley ASP

Table 4- Developing Neighbourhoods 95-100% Complete Low Density Residential Potential as of December 2018

City Sector	Area Structure Plan	Neighbourhood	Year Approved	Low Density Lots Capacity per Plan	2018 Remaining Potential Lots	% of Lots Completed
North	Castle Downs Extension	Chambery	1985	708	0	100%
		Rapperswill	2010	1,048	0	100%
	Edmonton North	Belle Rive	1982	1,147	58	95%
		Klarvatten	1982	1,605	0	100%
		Mayliewan	1983	1,202	0	100%
		Ozerna	1981	1,193	51	96%
	Palisades	Albany	2009	187	0	100%
		Carlton	1999	1,177	0	100%
		Cumberland	1984	1,603	0	100%
		Hudson	1997	548	0	100%
		Oxford	1985	927	0	100%
				11,345	**109**	
Northeast	Clareview (OP)	Clareview Town Centre	1980	271	0	100%
	Pilot Sound	Brintnell	2001	1,560	0	100%
		Hollick Kenyon	1991	1,375	0	100%
	Ebbers NASP	Ebbers	2006	304	0	100%
				3,510	**0**	
West	Lewis Farms	Breckenridge Greens	1991	427	0	100%
		Potter Greens	1990	510	0	100%
		Webber Greens	2000	750	5	99%
	The Grange	Glastonbury	1998	1,454	55	96%
				3,141	**60**	
Southeast	Ellerslie	Ellerslie	2001	1,218	0	100%
				1,218	**0**	
Southwest	Heritage Valley	Blackmud Creek	1998	635	0	100%

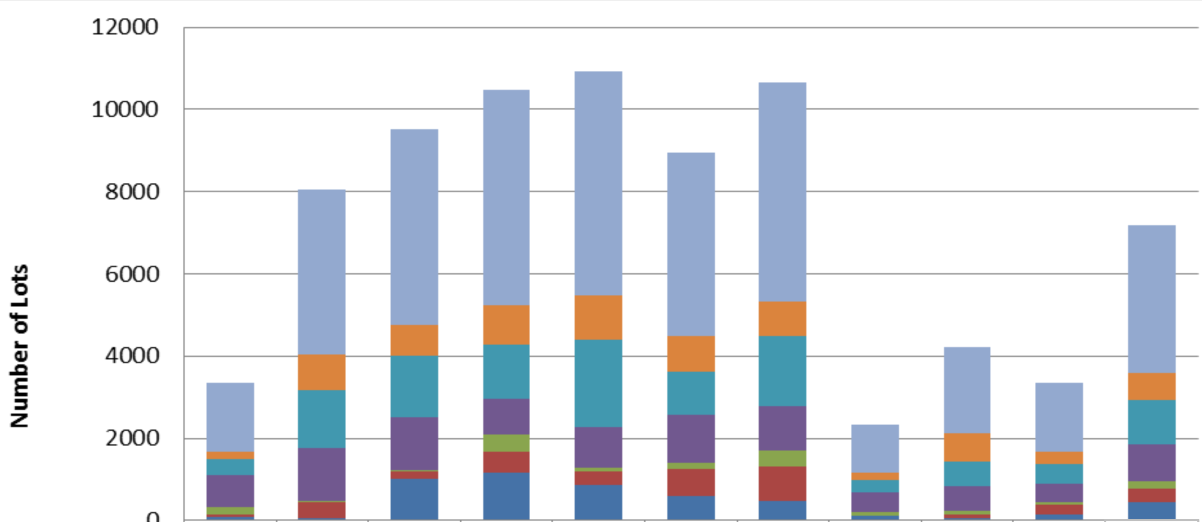
	(SCDB)	MacEwan	2001	1,118	0	100%
	Cashman NASP	Cashman	2012	0	0	100%
				1,753	**0**	
Citywide				**20,967**	**169**	

Note: *In contrast to previous reports, neighbourhoods classified as "Established" neighbourhoods as per the MDP and forming part of an ASP or SCDB have been excluded from the above Table 4 (and report), since they are already 100% complete, established and not considered developing neighbourhoods.*

1.4 ANNUAL LOW DENSITY RESIDENTIAL ABSORPTION

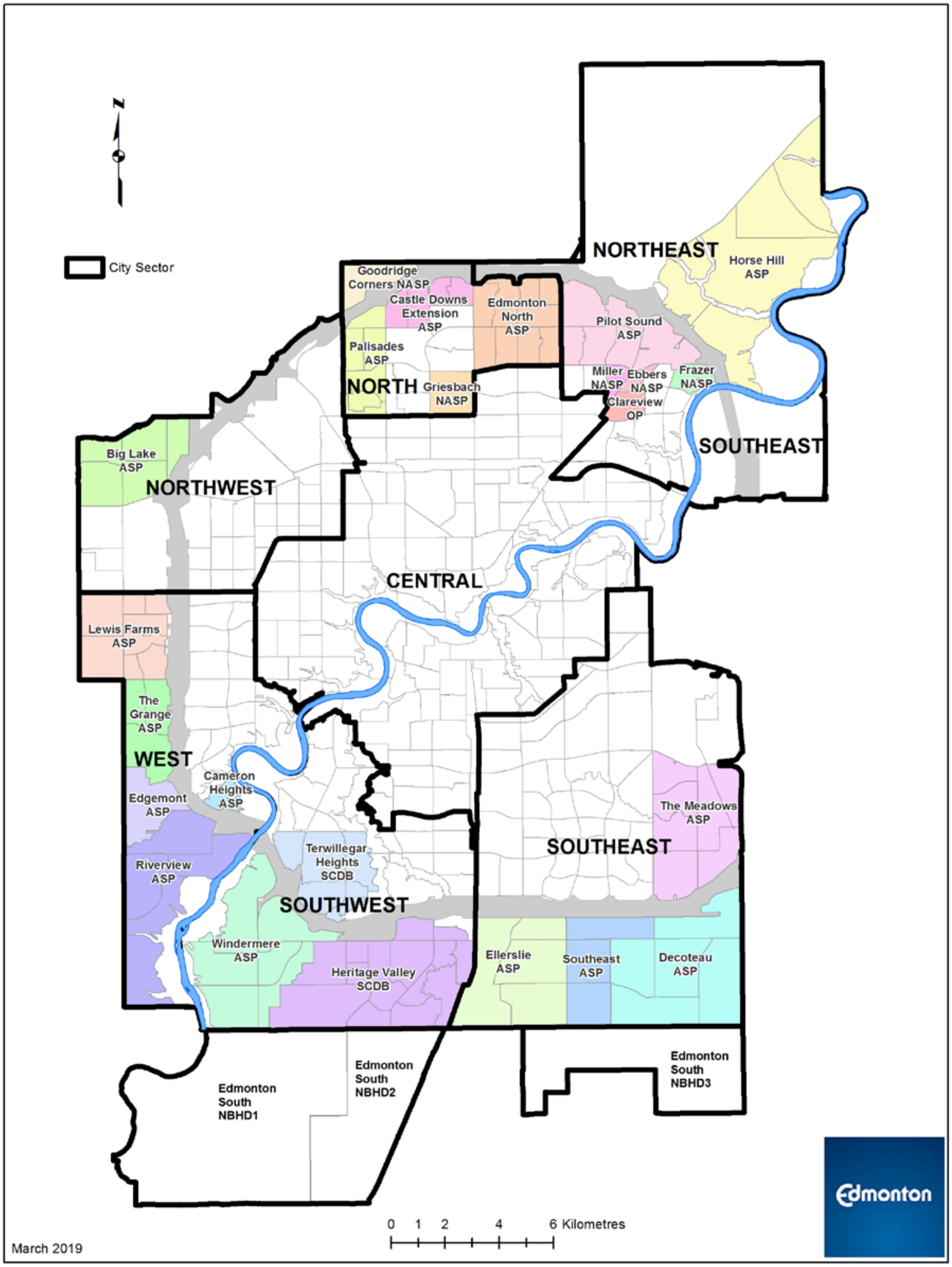
Absorption is the number of low density lots registered each year within the approved Area Structure Plans. Figure 1 shows the annual absorptions from 2008-2017 by City Sector. Lot absorption rates vary significantly from one sector of the city to another. The Southwest Sector had the highest low density residential absorption at 1,828 while the North Sector had the lowest at 210 in 2017. The total lot absorption increased from 1,852 to 4,809 from 2016 to 2017, with a 10 year average of 3,796 absorption rate. Future levels of economic activity and overall demand for housing and its affordability will affect the actual absorption of low density lots and lot supply.

Figure 1: Annual Absorptions by City Sector as of December 2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Average
Grand Total	1680	4027	4765	5237	5464	4473	5328	1163	2112	1673	3592
West	195	849	771	973	1054	858	840	193	668	288	669
Southwest	390	1420	1481	1295	2130	1038	1706	292	619	498	1087
Southeast	763	1278	1285	868	999	1175	1082	468	598	449	897
Northwest	187	52	30	417	80	162	382	95	97	53	156
Northeast	66	376	190	534	326	633	857	0	89	235	331
North	79	52	1008	1150	875	607	461	115	41	150	454

Map 1: Edmonton City Sectors and ASP/NASP Boundaries



Map 2: Status of Low Density Residential Development