2024 GROWTH MONITORING OVERVIEW

URBAN GROWTH | PLANNING & ENVIRONMENT SERVICES | URBAN PLANNING & ECONOMY

THE CITY PLAN CONTEXT

The 2024 growth monitoring reports detail growth trends under the direction of The City Plan. The reports align with the Plan's development pattern areas, which consist of the redeveloping area, the developing area, and the Future Growth Area (FGA) located south of 41 Avenue Southwest. The redeveloping area typically encompasses the area within Anthony Henday Drive while the developing area generally includes the area outside Anthony Henday Drive but north of 41 Avenue SW. The growth indicators used in the annual reporting are aligned with the land development process (Figure 1).

Figure 1. Land Development Process

This is the third annual series of reports that provide insights into how Edmonton is growing based on the following indicators:

- Approved Net New Dwellings
- Redeveloping Area Infill
- Low Density Residential Lot Absorption and Supply
- Net Residential Density
- Industrial Land Supply

In addition to these reports, visualizations of urban growth trends are accessible via the Monitoring and Analyzing Growth webpage. These visualizations include the Residential Building Permit Activities dashboard, the Low Density Residential Lot Absorption and Supply dashboard, and the Neighbourhood Profiles dashboard.

The data and trends in these reports are one way that Edmontonians and City Council can evaluate the impact of city policies and investments on urban growth. The reports analyze urban growth trends at various geographic scales, including citywide, development pattern areas, districts, nodes and corridors, non-residential areas, and individual neighbourhoods. Additionally, they include analyses of lot registration for Area Structure Plans and Neighbourhood Structure Plans.

To facilitate long term comparative analysis, statistics for pre-2020 activities have been aligned with The City Plan geographies. The 2024 reports incorporate longer-term trends to aid this analysis.

These products also contribute to the strategic measures and reporting requirements detailed in "Section IX: Measurement" of The City Plan.

URBAN GROWTH TRENDS

15,190

Net new dwellings approved in Edmonton in 2024. This is the highest count since 2005.

The Approved Net New Dwellings Report focuses on the number of net dwellings that received building permits in the developing and redeveloping areas. This information is required to track progress towards the infill target outlined in The City Plan. In 2024, Edmonton approved 15,190 net new dwellings, a 54 per cent increase from 2023. This is the highest count since 2005 and is 31 per cent above the most recent five-year average. This record-breaking development is attributed to factors like population growth, decreasing national inflation and interest rates, and the implementation of the new Zoning Bylaw 20001.

The developing area had 11,655 net new dwellings permitted, and the remaining 3,535 net new dwellings were permitted in the redeveloping area.

23

Per cent of net new dwellings approved in the redeveloping area in 2024.

The Redeveloping Area Infill Report provides details about the 2024 residential infill activity in Edmonton's redeveloping area, focusing on net new residential units

by dwelling type and zone. A key finding is that 3,535 net new units were approved in 2024, representing about 23 per cent of citywide net new dwellings. The report notes that there is an increasing diversity of dwelling types, with apartments/mixed-use units (41 per cent) and row houses with secondary suites (75 per cent) gradually replacing single-detached houses (Figure 2). Within the redeveloping area, single-detached and semi-detached houses collectively experienced a net loss of 73 units. This trend has intensified since The City Plan was approved in late 2020. From 2021–2024, 28 per cent of citywide net new dwellings have been approved in the redeveloping area; The City Plan's interim target is to achieve 32 per cent by the time the city reaches a population of 1.25 million, estimated to be in 2027.

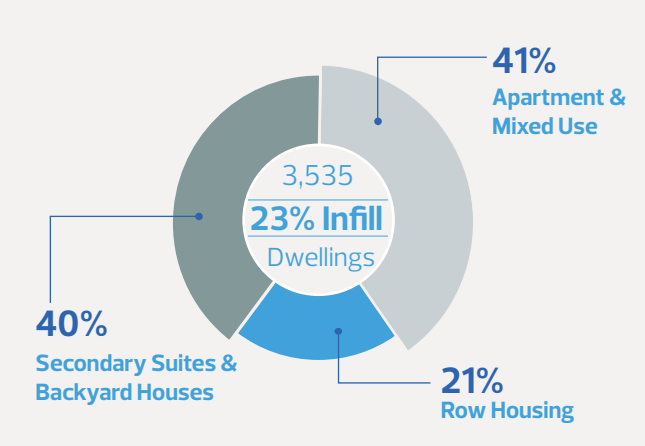

Figure 2. Net New Dwellings in the Redeveloping Area (2024)

Note: Since percentages are based on the net change that considers demolitions, the sum of positive percentages (i.e. resulting net new) in a chart can exceed 100 per cent.

Priority Growth Areas (PGAs) are nodes and corridors expected to see the most growth between 1 million and 1.25 million citywide population period. The PGAs, despite making up only 11 per cent of the total land in the redeveloping area, were places of relatively high residential growth in 2024, with 737 net new dwelling units added, representing about 21 per cent of all net new dwelling units within the redeveloping area. PGAs have recorded higher density development, with 80 per cent of net new dwelling units being apartments/mixed-use, compared to 40 per cent in the overall redeveloping area.

> **737** net new units were approved in PGAs in 2024, represeting about 21 per cent of all net new dwelling units within the redeveloping area.

The Low Density Residential (LDR) Lot Absorption and Supply Report measures the number of low-density residential lots registered annually. In 2024, the number of registered (i.e. absorbed) lots decreased by 9 per cent from 2023 (falling from 3,347 to 3,056 lots) and was 11 per cent lower than the most recent 5-year average. Fifty-four per cent of the lots were absorbed in the West Henday district, followed by the Southwest district with 18 per cent. Additionally, a total of 231 LDR lots were absorbed beyond planned neighbourhood capacity in the West Henday, Southwest, and Northwest districts. This occurs primarily as a result of rezoning land from medium density to low density or direct control zones that allow low-density development. This illustrates how actual LDR capacity can exceed planned capacity.

> As of December 2024, the LDR potential lot supply available in approved ASPs and NSPs was **68,240**.

As of the end of 2024, 68,240 potential planned and developing LDR lots remain in approved statutory plans. The Ellerslie, West Henday, and Horse Hills districts account for the majority of this supply, with over 54,000 LDR lots, representing about 79 per cent of the total. Based on the most recent five-year annual average absorption rate of 3,432 lots per year, the current citywide LDR lot supply is forecasted to meet demand until 2045, which is beyond the city's projected population horizon of 1.5 million.

1,880 hectares

Total net vacant industrial land in 2024.

The Vacant Industrial Land Supply and Absorption Report provides an overview of Edmonton's industrial land. A robust supply of industrial land is critical for the city's fiscal sustainability and economic growth. The report details the 2024 vacant and reserved industrial land supply, industrial land absorption trends, and land availability by zone and parcel size. Edmonton boasts an ample supply of industrial land to accommodate projected growth. The total net vacant industrial land is 1,880 hectares. Of this, 920 hectares (49 per cent) are located in the Established Non-Residential Area, and 890 hectares (48 per cent) are in the New Non-Residential Area. Additionally, there are approximately 5,110 gross hectares of reserved industrial land, with the majority (4,290 hectares, 84 per cent) situated in the New Non-Residential Area. Furthermore, FGA is anticipated to provide an additional 2,290 hectares of land for non-residential development once statutory plans are approved. Thirty-nine net hectares of industrial land were absorbed in 2024, with the Southwest industrial area accounting for the highest proportion at 42 per cent.

The Net Residential Density Report provides an overview

of residential land use density across Edmonton. The overarching trends in 2024 indicate a gradual citywide increase in density, primarily due to a decrease in low density parcel sizes as part of the evolution of low-density and row house developments. The total net residential density for the redeveloping area stands at 32 dwelling units per net residential hectare (du/nrha) (Figure 3). This number has gradually increased over the past two decades, largely driven by new medium density residential (MDR) and, to a lesser extent, high density residential (HDR) developments. The net residential density in the developing area has been on an upward trend for the past twenty years as well, currently standing at 31 du/nrha. This predominantly comprises LDR, single detached and semi-detached houses, with a growing proportion of street-oriented row houses.

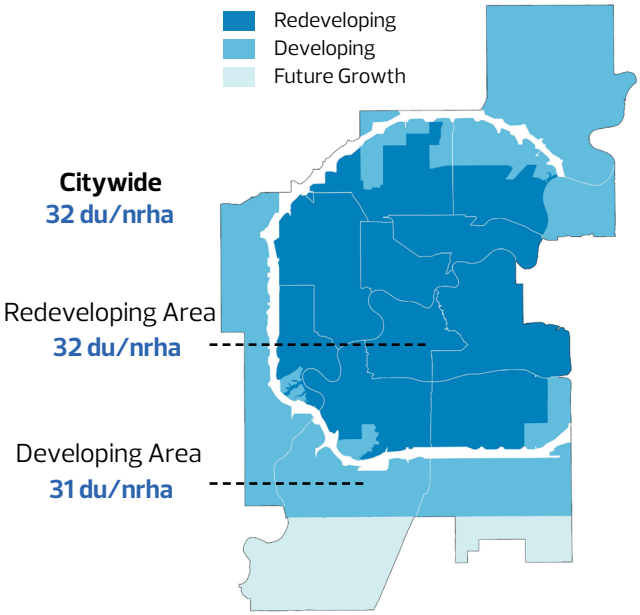

Figure 3. Net Residential Density (2024)

As of 2024, the Central District remains the densest district at 83 du/nrha, followed by the Scona District (46 du/nrha) and the North Central District (35 du/nrha). At the nodes and corridors level, the Center City Node in the Central District is the densest (247 du/nrha), followed by the Bonnie Doon District Node (181 du/nrha) and the University-Garneau Major Node (171 du/nrha). Also, the three densest PGAs in 2024 are all in the Center City Node: Centre City - Downtown (401 du/nrha), Wîhkwêntôwin (261 du/nrha), and Quarters (251 du/nrha).

REPORTING CONSIDERATIONS

For the ***Approved Net New Dwellings*** and ***Redeveloping Area Infill*** reports, analyses were conducted using data from building permits and home improvement permits approved in 2024. This data was collated and validated through both automated and manual processing, primarily to support urban growth reporting and planning. This approach differs from the weekly, monthly, or quarterly building permit reports and summaries published on the City of Edmonton's Open Data Portal, which mainly focus on activity volume and application processing times. The City of Edmonton tracks building permit approvals, not starts or completions. Citywide starts and completions data are available from the Canadian Mortgage and Housing Corporation.

The building permits-based reports include new, permitted secondary suites that meet the minimum criteria described by the Secondary Suite Design Guide. It is important to note a change in reporting methodology that started in 2022 and continues: secondary suites are counted as individual units within row house developments. In contrast, the 2021 Redeveloping Area Infill report included secondary suites within row house developments as part of the total unit count. Consequently, Figure 4 in the 2021 report is not comparable to similar figures in reports from 2022 onwards that show secondary suites analysis.

Historical values presented in reports may exhibit minor discrepancies when compared to previous reports. These differences are not significant and arise from continuous improvements in the processing of building permits and home improvement permits.

The ***Low Density Residential Lot Absorption and Supply*** report tracks LDR lot absorption and supply in developing area neighbourhoods, including those with repealed plans. The total potential LDR lot capacity changes continually due to amendments to Plans in Effect, and the number of units in lot analysis is affected when lot registration applications are submitted in a different year than when approved.

Beginning with the 2022 report, LDR lot absorption data now includes lots in Direct Development Control Provision (DC1) and Site Specific Development Control Provision (DC2) zones, as defined by the Zoning Bylaw. The inclusion of these LDR lots provides a more comprehensive understanding of progress in the developing area. To account for previously absorbed LDR lots in DC zones, the 2015 Lot Registration report serves as a baseline, in addition to LDR lots absorbed in DC zones since 2016. This analysis is conducted annually.

The ***Net Residential Density*** report analysis is dependent on building addresses and is thus more accurate for single-unit parcels than multi-unit parcels.

The ***Vacant Industrial Land Supply and Absorption*** report analysis is based on contiguous-owned sites, as opposed to parcels or buildings. The 2024 report introduces significant changes in data collection for vacant land, reserved land, and absorption calculations. This means direct comparisons to previous years' data (2020-2023) are not recommended.