

LOW DENSITY RESIDENTIAL LOT ABSORPTION AND SUPPLY

Edmonton

2025 ANNUAL REPORT

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

INTRODUCTION

Early indicators of growth are vital to growth planning and management. Effective monitoring of early indicators can inform decisions related to planning new communities and the infrastructure and amenities needed to support them. Monitoring can also be used to identify whether emerging market demand aligns with land use planning policies and best practices.

Low density residential (LDR) lot absorption is considered an early indicator of residential growth in Edmonton's developing area as it occurs early on in the land development process.¹

This report uses LDR lot absorption data from Edmonton's developing area to provide a snapshot of current and emerging growth areas for new housing as well as an estimate of the long-term supply of residential lots.² The analysis covers the developing and planned neighbourhoods in the developing area.

For this report, all references to "lots" pertain exclusively to LDR lots. The analysis covers 87 developing neighbourhoods and nine planned neighbourhoods.^{3,4} "Growth" refers to residential development in the form of net new dwelling units based on building permit data.

KEY FINDINGS

- Lot absorption reached its highest annual level since 2020, despite a decrease in the population growth rate. However, the pace of lot absorption is expected to slow in the near future due to a high inventory of unsold dwelling units within the city and a declining population growth rate.

- While Southwest and West Henday districts are expected to remain high growth areas, growth in the developing area is expected to begin shifting to other districts, notably Ellerslie District and then Horse Hill District.
- At the end of 2025, the city had a 17-year supply of unabsorbed lots, based on the current rate of lot absorption.
- In some neighbourhoods, the number of lots absorbed exceeds the total number of lots identified within the applicable statutory plans (i.e. planned capacity). This is most prevalent in the Northwest, Whitemud, Southwest, Ellerslie and Northeast districts. This can occur when lots are rezoned from non-residential zones or high/medium density zones to zones that allow for low density development. It can also occur when low density lots are created more densely than the standard density designated in the [Terms of Reference for Area and Neighbourhood Structure Plans](#).

OVERALL LOT ABSORPTION

In 2025, 5,130 lots were absorbed, representing a 38 per cent increase from the 3,719 lots recorded in 2024 (Figure 1). This is the highest annual lot absorption since at least 2020, when the current approach to monitoring began.

Despite the high level of lot absorption activity in 2025, future activity is expected to decline. This is for two main reasons:

- Anticipated reduction in population growth rate: Population growth is one of the main drivers of

¹ An LDR lot is considered absorbed once it is registered at Alberta Land Titles, making it legally available for development. As per the [Land Development Process](#), lot absorption occurs before the issuance of building permits.

² Annual absorption is the number of LDR lots registered each year within approved area and/or neighbourhood statutory plans. Long-term housing supply is determined by studying the potential lot supply which refers to the estimated number of unregistered LDR lots as per approved Area Structure Plans (ASPs), Neighbourhood Area Structure Plans (NASPs), Servicing Concept Design Briefs (SCDBs) or Neighbourhood Structure Plans (NSPs).

³ *Developing neighbourhoods* are those with approved NSPs, making them ready for residential development. These neighbourhoods are generally located within Edmonton's developing area and are designated for greenfield development. *Planned neighbourhoods* are new suburban communities approved in an ASP but still awaiting NSP approval.

⁴ This report only considers single-detached and semi-detached lots. Lots for row housing and country residential, while also considered low density residential in some cases, are excluded.

housing development. However, the population growth rate is anticipated to slow in the near future which could lower the demand for new lots.⁵

- Existing unsold inventory: As of January 2026, the Edmonton Census Metropolitan Area had the highest levels of unsold ground-oriented dwelling units on record, with current levels higher than all of the seven major Census Metropolitan Areas in Canada.⁶

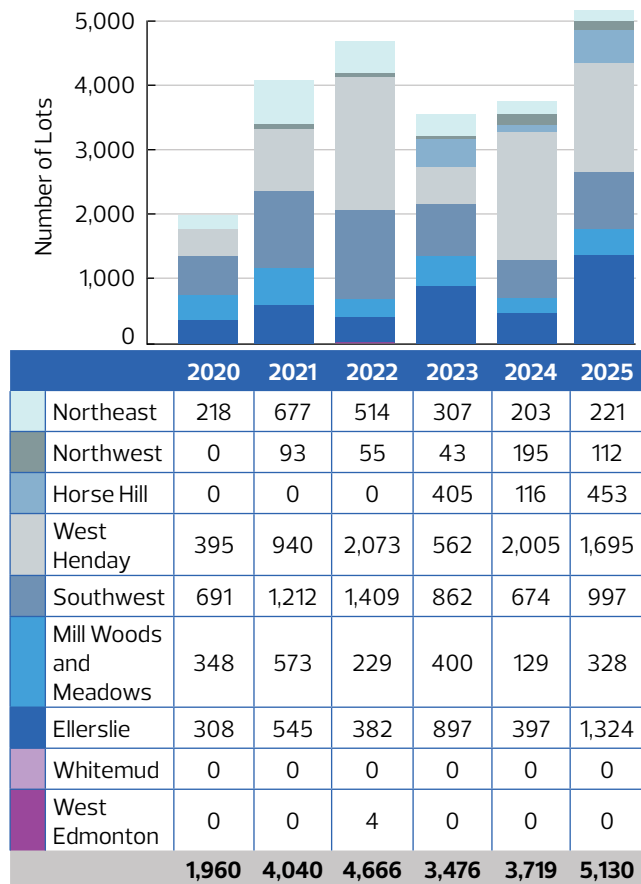


Figure 1. Annual LDR Lot Absorptions By District, 2020 - 2025

DISTRICT LOT ABSORPTION

Lot absorption in 2025 was highly concentrated within the West Henday, Ellerslie and Southwest districts; these districts combined accounted for 78 per cent of the annual lots absorbed (4,016 lots).⁷ West Henday led with 1,695 lots (33 per cent), followed by Ellerslie with 1,324 lots (26 per cent) and Southwest with 997 lots (19 per cent) (Figure 1).

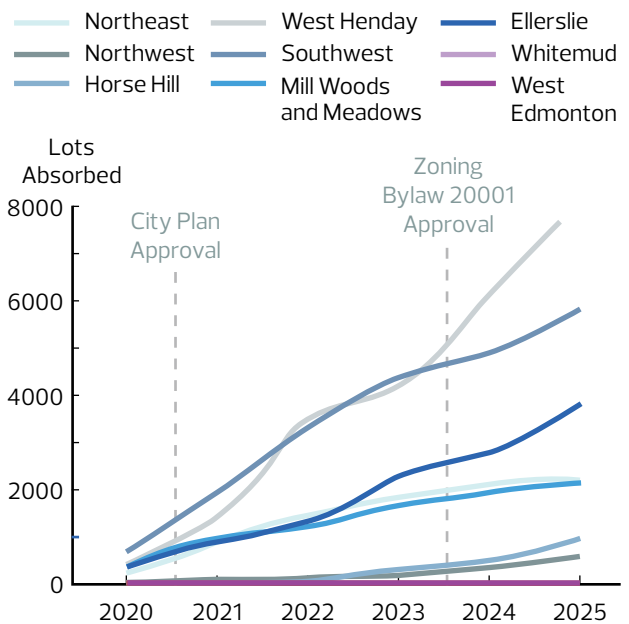


Figure 2. Cumulative LDR Lots Absorption By District, 2020 - 2025

The West Henday and Southwest districts have the highest cumulative lot absorption since 2020 (Figure 2), together accounting for approximately 59 per cent (13,515 lots) of the lots registered during this period. In addition, they have been among the top three districts every year since 2020 (Figure 1).

However, there has also been a recent increase in lot absorption in Ellerslie and Horse Hill districts. The developing area neighbourhoods in the Ellerslie District experienced moderate, steady lot absorption between 2020 and 2022 (annual average 2020-2022: 412 lots absorbed), followed by an increase in 2023 (135 per cent year-over-year increase) and another in 2025 (234 per cent year-over-year increase) (Figure 1). Lot absorption activity in Horse Hill District began in 2023 and dropped in 2024; in 2025 the number of lots absorbed nearly quadrupled compared to the year before (Figure 1).

As lot absorption is an early indicator of growth, districts with continued high levels or recent increases in lot absorption will likely have some of the highest growth in the future.

In contrast, districts with developing area neighbourhoods inside Anthony Henday Drive experienced limited lot absorption activity. For example, the Northeast District has steadily declined from a high of 677 lots in 2021 to 221 in 2025.

⁵ City of Edmonton, [Spring 2026 Outlook Summary](#)

⁶ Canada Mortgage and Housing Corporation (CMHC), [Spring 2026 Housing Supply Report, Edmonton - Inventory of Completed and Unabsorbed Homeowner and Condominium Units by Dwelling Type by Census Subdivision](#), April 2026

⁷ Percentages may not total 100 per cent due to rounding.

Map 1 illustrates the spatial distribution of cumulative absorbed lots in developing neighbourhoods with approved plans. Information on lot absorption by neighbourhood or Area Structure Plan (ASP) area is included in Appendix 1 and the [Lot Absorption and Supply dashboard](#) on the growth monitoring and analysis webpage.

Top 10 Neighbourhoods with the Highest Number of Low Density Residential Lot Absorption

The 10 neighbourhoods with the highest lot absorption in 2025 cumulatively absorbed 3,502 lots, accounting for 68 per cent of the annual absorption activity (Figure 3). Of these, the top four neighbourhoods (Alces, Chappelle, The Orchards At Ellerslie, and Keswick) were located within Ellerslie and Southwest districts.

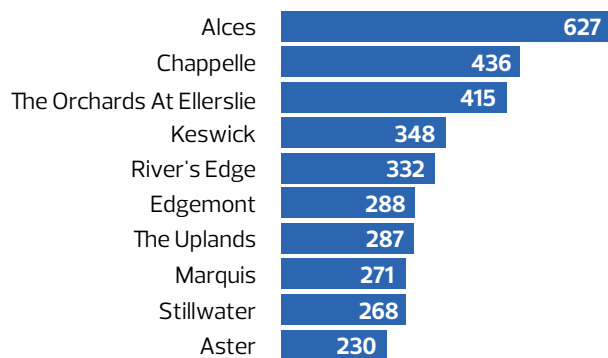


Figure 3. Number of LDR Lots Absorbed in the Top 10 Neighbourhoods, 2025

REMAINING POTENTIAL LOT SUPPLY

As of 2025, the developing area has a remaining potential lot supply of 64,041 lots (Figure 4, Appendices 1 and 2).⁸

On average, approximately 3,800 lots were absorbed each year between 2020 and 2025. If that absorption rate continues and the lot supply does not change significantly through the approval of new Neighbourhood Structure Plans (NSPs), the remaining lot supply in the developing area would last approximately 17 years. Edmonton's citywide population is forecasted to reach 1.5 million in approximately 11 years,⁹ which means that the current lot supply could last beyond the 1.5 million population horizon.¹⁰ However, as the pace of lot absorption and supply varies by district, some districts are expected to reach LDR capacity around the 1.5 million population horizon.

⁸ The remaining potential lot supply or capacity may fluctuate due to plan amendments and flexibility to build multiple building types in each residential zone.

⁹ City of Edmonton, [Spring 2026 Outlook Summary](#)

¹⁰ [The City Plan](#) provides direction on how growth can be managed as Edmonton's population grows from one to two million. The plan divides this growth into four 250,000 people increments (population horizons) and sets targets for each population horizon.

64,041 remaining potential LDR lots are available in area with approved ASPs and NSPs, as of December 2025.

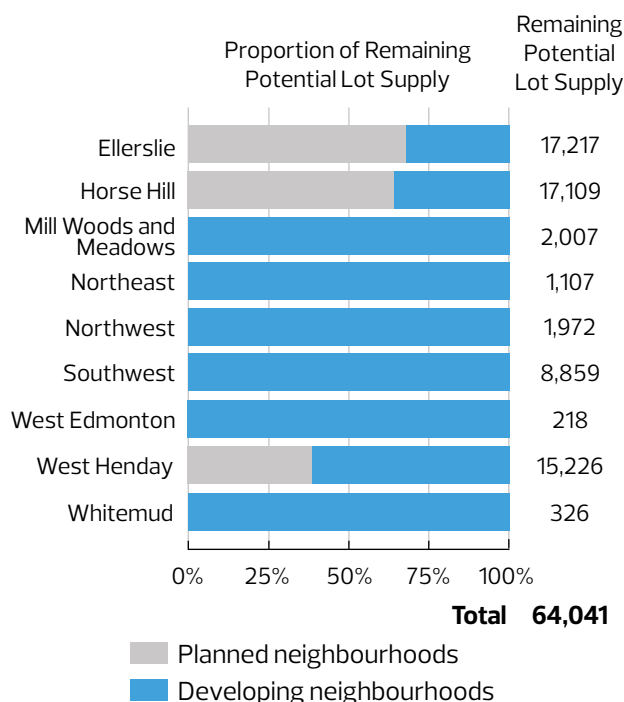


Figure 4. Remaining Potential LDR Lot Supply By District, 2025

Further information on lot supply is included in Appendices 1 and 2 and the interactive [Lot Absorption and Supply dashboard](#) on the growth monitoring and analysis webpage.

Supply in Developing and Planned Neighbourhoods

Of the remaining potential lot supply, 28,486 lots (44 percent) are in developing neighbourhoods and the remaining are in planned neighbourhoods (i.e. neighbourhoods without an approved NSP).

All neighbourhoods in the Southwest, Mill Woods and Meadows, Northwest, Northeast, Whitemud and West Edmonton districts have approved NSPs (Figure 4). This means that remaining supply in these districts are in developing neighbourhoods only. Therefore lot supply in these districts is unlikely to change significantly.

Conversely, the Ellerslie, Horse Hill and West Henday districts have supply both in developing and planned neighbourhoods. If there are notable changes to the developing area's lot supply in the future, it would likely be in these districts when NSPs are approved for planned neighbourhoods.

LOW DENSITY RESIDENTIAL LOTS BEYOND PLANNED CAPACITY

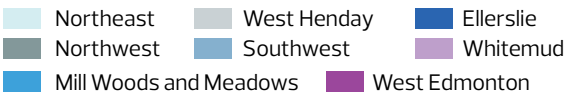
Several neighbourhoods have recorded lot absorption that exceeds the capacity originally established by their applicable statutory plans. This can occur when lots are rezoned from non-residential zones or high/medium density zones to zones that allow for low density development. It can also occur when low density lots are created more densely than the standard density designated in the [Terms of Reference for Area and Neighbourhood Structure Plans](#).

As of 2025, 31 developing neighbourhoods have collectively absorbed 4,984 lots in excess of their planned capacity as defined by their corresponding statutory plans (Appendix 3). This is about three per cent more than the planned capacity in all the statutory plans within the developing area.

The excess lots absorbed are highly concentrated in neighbourhoods within the Northwest, Whitemud, Southwest, Ellerslie and Northeast districts, which collectively account for 91 per cent of the total recorded excess lots absorbed as of 2025 (Figure 5). Refer to Figure 6 for the top 10 neighbourhoods with the highest number of lots absorbed beyond the planned capacity.

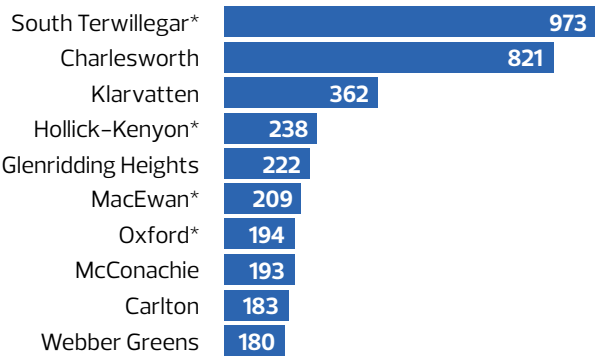
DATA NOTES

The methodology used for the analysis for this report is significantly different from previous reports.¹¹ Due to this shift, some statistics may differ from figures published in prior reports.



Total: 4,984 Lots

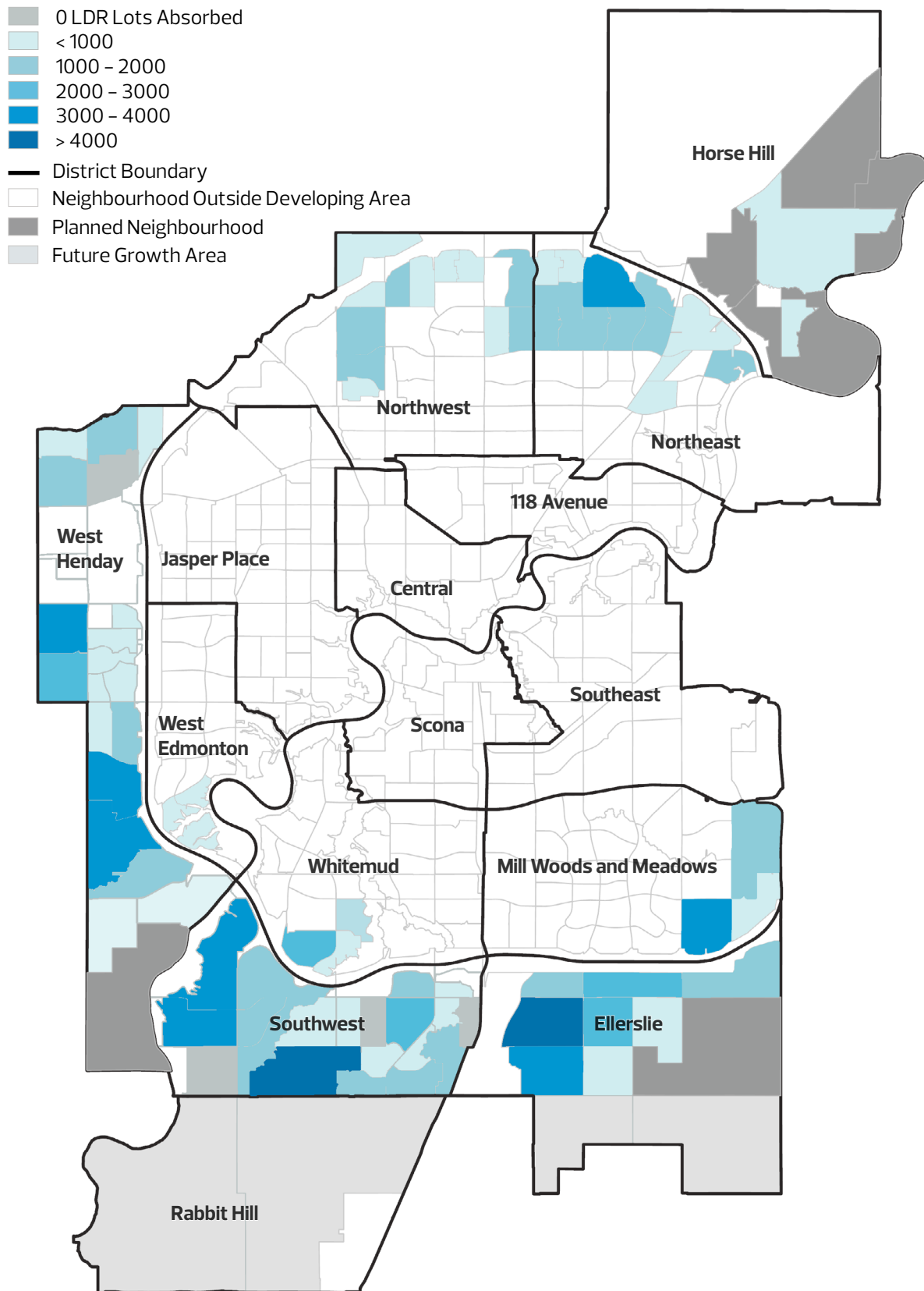
Figure 5. Number of LDR Lots Absorbed Beyond Planned Capacity By District (as of December 2025)



*Neighbourhoods with repealed NSPs/NASPs

Figure 6. Number of LDR Lots Absorbed Beyond Planned Capacity (as of December 2025) in the Top 10 Neighbourhoods

11 The previous reports used a tabular approach that only added new lots absorbed to the previous year's total and subtracted the amount from the planned capacity as per the applicable statutory plans to estimate lot absorbed versus supply. This method did not account for the dynamic land development process, where lots could be changed (e.g. rezoned, subdivided, etc.). This report uses spatial analysis methods used in the [Lot Absorption and Supply dashboard](#) that accounts for changes to lot absorption throughout the dynamic land development process. For more information about the methodology, contact the Monitoring and Analysis team at the City of Edmonton (monitoringandanalysis@edmonton.ca).



Map 1. Cumulative Low Density Residential Lot Absorption By Neighbourhood (as of December 2025)

APPENDIX 1. DEVELOPING NEIGHBOURHOODS LOW DENSITY RESIDENTIAL LOT ABSORPTION

Planning District	Area Structure Plan	Neighbourhood (NSP)	Low Density Lot Capacity	Remaining Potential Lots (as of 2025)	Percent of Lots Absorbed
Ellerslie	Decoteau	Alces	2,194	1,062	52%
		Meltwater	1,490	1,340	10%
	Ellerslie	Ellerslie	1,211	0	100%
		Summerside*	4,584	499	89%
		The Orchards At Ellerslie	4,333	770	82%
	Southeast	Charlesworth	1,377	0	100%
		Mattson	1,838	1,513	18%
		Walker	3,018	45	99%
Total			20,045	5,229	
Horse Hill	Horse Hill	Quarry Ridge	822	413	50%
		Marquis	6,365	5,682	11%
Total			7,187	6,095	
Mill Woods and Meadows	The Meadows	Aster	2,186	1,209	45%
		Laurel	3,743	31	99%
		Maple	1,524	0	100%
		Tamarack	2,226	767	66%
Total			9,679	2,007	
Northeast	Clareview Town Centre	Clareview Town Centre*	303	32	89%
	Ebbers	Ebbers*	304	0	100%
	Edmonton North	Crystallina Nera East	693	16	98%
		Crystallina Nera West	1,129	222	80%
		Ozerna*	1,193	0	100%
		Schonsee	1,321	39	97%
	Fraser	Fraser*	1,523	239	84%
	Palisades	Mayliewan*	1,202	0	100%
	Pilot Sound	Brintnell*	1,560	0	100%
		Cy Becker	1,193	0	100%
		Gorman	558	450	19%
		Hollick-Kenyon*	1,375	0	100%
		Matt Berry*	1,247	109	91%
		McConachie	2,928	0	100%
Total			16,529	1,107	
Northwest	CastleDownsExtension	Canossa	1,370	373	73%
		Chambery*	708	0	100%
		Elsinore*	1,083	283	74%
		Rapperswill	1,048	0	100%

**APPENDIX 1. DEVELOPING NEIGHBOURHOODS (NSP) LOW DENSITY RESIDENTIAL LOT ABSORPTION
(CONTINUED)**

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity	Remaining Potential Lots (as of 2025)	Percent of Lots Absorbed
	Edmonton North	Albany	187	0	100%
		Belle Rive*	1,147	37	97%
		Carlton	1,163	0	100%
		Eaux Claires	997	235	76%
		Klarvatten	1,620	0	100%
	Goodridge Corners	Goodridge Corners	1,156	1,044	10%
	Palisades	Cumberland*	1,603	0	100%
		Hudson	548	0	100%
		Oxford*	927	0	100%
Total			13,557	1,972	
Southwest	Cashman	Cashman*	0	0	0%
	Heritage Valley	Allard*	1,931	153	92%
		Callaghan*	905	197	78%
		Cavanagh	1,327	172	87%
		Chappelle	4,558	205	96%
		Desrochers Area	865	0	100%
		Graydon Hill*	340	0	100%
		Hays Ridge Area	1,242	851	31%
		Heritage Valley Area	393	393	0%
		Heritage Valley Town Centre	151	5	97%
		Paisley	792	0	100%
		Richford	229	21	91%
		Rutherford*	2,795	240	91%
	Heritage Valley SCDB	Blackmud Creek*	635	0	100%
		MacEwan*	1,118	0	100%
	Windermere	Ambleside	2,117	680	68%
		Glenridding Heights	1,083	0	100%
		Glenridding Ravine	2,008	378	81%
		Kendal	3,839	3,839	0%
		Keswick	4,201	882	79%
		Windermere	4,189	843	80%
Total			34,718	8,859	
West Edmonton	Cameron Heights	Cameron Heights*	883	191	78%
	Wedgewood Heights	Wedgewood Heights*	453	0	100%
	West Jasper Place South	Donsdale*	505	27	95%
Total			1,841	218	

**APPENDIX 1. DEVELOPING NEIGHBOURHOODS (NSP) LOW DENSITY RESIDENTIAL LOT ABSORPTION
(CONTINUED)**

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity	Remaining Potential Lots (as of 2024)	Percent of Lots Absorbed
West Henday	Big Lake	Hawks Ridge	1,408	844	40%
		Kinglet Gardens	1,557	519	67%
		Pintail Landing	861	861	0%
		Starling	1,158	328	72%
		Trumpeter Area	1,552	487	69%
	Edgemont	Edgemont	3,871	806	79%
	Lewis Farms	Breckenridge Greens*	427	0	100%
		Potter Greens	510	0	100%
		Rosenthal	3,020	922	69%
		Secord	3,075	0	100%
		Stewart Greens	669	218	67%
		Suder Greens*	1,025	143	86%
		Webber Greens	750	0	100%
	Riverview	River's Edge	2,428	1,639	32%
		Stillwater	2,880	1,893	34%
		The Uplands	1,989	318	84%
	The Grange	Glastonbury*	1,818	44	98%
		Granville	1,152	360	69%
		The Hamptons*	3,460	360	90%
Total			33,610	9,742	
Whitemud	TerwillegarHeightsSCDB	Mactaggart*	951	326	66%
		Magrath Heights*	997	0	100%
		South Terwillegar*	1,138	0	100%
Total			3,086	326	
Grand Total			140,252	35,555	

*Neighbourhoods with repealed NSPs/NASPs.

APPENDIX 2. PLANNED NEIGHBOURHOODS POTENTIAL LOW DENSITY RESIDENTIAL LOT SUPPLY

Planning District	Area Structure Plan	Planned Neighbourhood	Low Density Lot Capacity
Ellerslie	Decoteau	Decoteau	2,761
		Kettle Lakes	5,706
		Snowberry	3,521
Total			11,988
Horse Hill	Horse Hill	Horse Hill Neighbourhood 1B	1,743
		Horse Hill Neighbourhood 3	1,293
		Horse Hill Neighbourhood 4	2,873
		Horse Hill Neighbourhood 5	5,105
Total			11,014
West Henday	Riverview	Grandisle Neighbourhood 4	1,444
		White Birch Neighbourhood 5	4,040
Total			5,484
Grand Total			28,486

APPENDIX 3. LOW DENSITY RESIDENTIAL LOTS ABSORBED BEYOND PLANNED CAPACITY AS OF DECEMBER 2025

Planning District	Neighbourhood	LDR Lot Absorption Beyond Capacity
Ellerslie	Charlesworth	821
	Ellerslie	9
Total		830
Mill Woods and Meadows	Maple	42
Total		42
Northeast	Brintnell*	70
	Cy Becker	69
	Ebbers*	1
	Hollick-Kenyon*	238
	Mayliewan*	79
	McConachie	193
	Ozerna*	12
Total		662
Northwest	Albany	42
	Carlton	183
	Chambery*	76
	Cumberland*	122
	Hudson	172
	Klarvatten	362
	Oxford*	194
	Rapperswill	18
Total		1,169
Southwest	Blackmud Creek*	144
	Desrochers Area	160
	Glenridding Heights	222
	Graydon Hill*	26
	MacEwan*	209
	Paisley	154
Total		915
West Edmonton	Wedgewood Heights*	41
Total		41
West Henday	Breckenridge Greens*	99
	Potter Greens	62
	Secord	3
	Webber Greens	180
Total		344

APPENDIX 3. LOW DENSITY RESIDENTIAL LOTS ABSORBED BEYOND PLANNED CAPACITY AS OF DECEMBER 2025 (CONTINUED)

Planning District	Neighbourhood	LDR Lot Absorption Beyond Capacity
Whitemud	Magrath Heights*	8
	South Terwillegar*	973
Total		981
Grand Total		4,984

*Neighbourhoods with repealed NSPs/NASPs