Calgary

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Attachment 2



Citywide Growth Strategy Update

October 2026

ISC: Unrestricted

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Executive summary



Purpose

Calgary's population has grown at a record pace. Through the Citywide Growth Strategy (the "Strategy"), The City of Calgary ("The City") works to accommodate this growth in a way that helps build a livable and vibrant city. This annual update provides residents, businesses, the development and building industry and Council with valuable growth-related information. This includes updates on current growth activity and financial investment information at the citywide level, and for each of the three components of the Strategy—industrial, new communities, and established areas.

This annual update summarizes the data that is relied upon to inform growth investment decisions. It also transparently reports on the impacts of those investments, including spending and resultant development. In doing so, it is the accountability function of the Citywide Growth Strategy.



Citywide Growth Strategy

The Citywide Growth Strategy proactively addresses growth. In collaboration with a network of working groups, the Strategy focuses on how and where to invest to best achieve the long-term vision described in the Municipal Development Plan and Calgary Transportation Plan. The Strategy enables growth in the residential and non-residential tax base by leveraging private investment through public investment, creating process improvements and working in collaboration with the development industry, communities and business areas to identify and resolve growth-related challenges. The Strategy has three components:

Industrial

This component looks to enable long-term industrial investment and development to support viable industrial areas. These areas in turn support employment and goods movement which are the foundation of Calgary's role as an important part of the regional inland port and distribution nexus for Western Canada.

New communities

This component helps ensure new communities are successful by directing growth to locations where infrastructure can be delivered within The City's financial capacity and where residents are well connected to existing amenities. It also supports complete communities by providing a wide range of housing choices and mobility options.

Established areas

Growth is enabled and supported in established areas by prioritizing and planning investments and reducing barriers to redevelopment through various programs:

- **Established Area Growth and Change Strategy** is helping growing communities alleviate growth pressures by delivering high-quality public amenities that are valued by the community and provide new ways to enjoy and move through their communities, both through investment programs and community grants.
- **Main Streets** is about building and delivering public space projects along designated streets with high levels of activity and vibrancy. These new spaces are transformative for communities and support a future of growing businesses and housing opportunities.
- **Transit-Oriented Development** (TOD) is a way of building that puts more homes, businesses, and services near train or bus stations, making it easier for people to meet all of their daily needs by using public transit.
- **Utility redevelopment programs and Housing Accelerator Fund utility pilot programs** support growth in established areas by investing in water, sanitary, stormwater and power infrastructure to accommodate new development and address site-specific servicing barriers to new housing.

2025 key takeaways

Growth

- **Growth:** Calgary continued to experience strong growth in 2025, adding an estimated 48,900 residents and reaching a population of approximately 1.56 million. While population growth moderated from the record pace experienced in 2024, it remained well above historical averages. Housing construction also remained historically strong, with approximately 23,000 residential building permits issued citywide.
- **Actions and investment:** Accommodating this growth requires action across all components of the Citywide Growth Strategy. In 2025, the Citywide Growth Strategy helped direct over $180 million to balance investments in housing, infrastructure, redevelopment, and economic development to support a growing and resilient city.

Industrial areas

- **Growth:** The industrial market in the greater Calgary region continued to perform strongly in 2025, supported by robust demand, increasing construction activity, and vacancy rates below three per cent. Industrial development remains an important source of ecmployment growth, economic diversification, and non-residential assessment growth. However, Calgary itself continues to face challenges for industrial development related to the conversion of industrial lands to other uses, a declining supply of shovel-ready industrial lands, and higher development costs compared to regional municipalities.
- **Actions and investment:** In response, The City advanced the Industrial Action Plan, including two complementary industrial incentive programs that offset taxes and development costs, in order to encourage private investment and support industrial development within city boundaries. These initiatives are intended to increase the supply of shovel-ready industrial land, improve development readiness, and strengthen Calgary's competitiveness as an industrial and logistics hub. Major utility and servicing projects continue to be planned and advanced to support long-term industrial growth and employment opportunities.

New communities

- **Growth:** Housing growth in new communities recorded another historic year, with approximately 13,000 new homes created through building permits across Calgary's 40 actively developing communities. New communities continue to provide a significant share of Calgary's housing supply and are forecast to accommodate approximately 58,000 additional homes over the next five years. Strong housing construction has helped improve housing supply and choice for Calgarians.
- **Actions and investment:** New community growth was supported through more than $125 million of off-site levy and City infrastructure investment in 2025, representing the largest share of Citywide Growth Strategy investment. This helped maintain a serviced land supply estimated at seven to nine years. While this positions Calgary well to accommodate future growth, slowing population projections and declining housing starts highlight the need to align future approvals and infrastructure investment with market demand to maximize the value of public investment while maintaining sufficient housing capacity.

Established areas

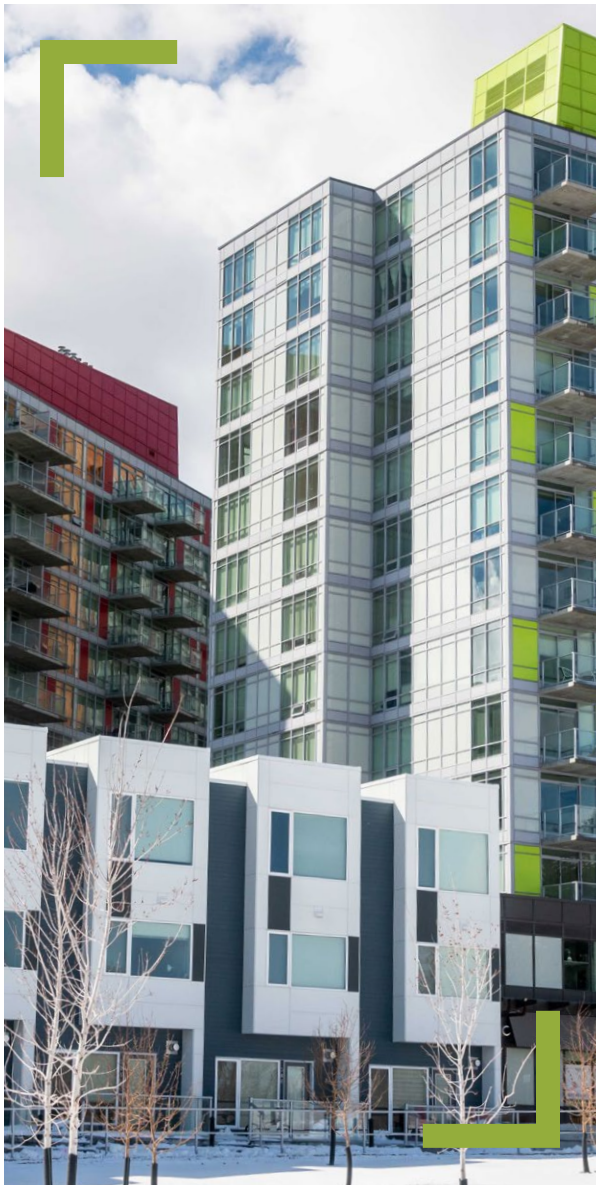
- **Growth:** Vibrant established areas are an essential part of a growing, sustainable city. Approximately 9,700 homes were created through building permits in these communities. 2025 represented one of the strongest years for redevelopment on record. Much of this growth occurred through apartments, rowhouses, and townhomes, supporting more compact development in locations already served by existing infrastructure, transit, employment areas, services and amenities. Redevelopment remains an important component of achieving the Municipal Development Plan's balanced growth objectives.
- **Actions and investment:** Supporting redevelopment and investing in growing communities was achieved through several investment and incentive programs in 2025. In total, over $50 million in targeted improvements were delivered through the Established Area Growth and Change Strategy, Main Streets Program, Transit-Oriented Development Program, Utility Redevelopment Programs, and Housing Accelerator Fund initiatives. These investments improved public spaces, added community amenities, supported housing through planning and land sales near transit, and increased infrastructure capacity through network improvements. Together, these investments help existing communities stay attractive for residents and businesses.

Data sources and reporting notes

This update relies upon City of Calgary data sources, including the Suburban Residential Growth 2026–2030 report and the Calgary & Region Economic Outlook 2026–2031. Most data reporting is for the 2025 year, unless otherwise noted. Updates from City initiatives that have occurred in 2026 are included in some sections. Budget data is aligned with the 2023–2026 Service Plans and Budgets. Third party data has been sourced where used. If not sourced, data can be assumed to be from The City. A municipal census has not been completed since 2019; therefore, some previously reported data is not available, including vacancy rates and occupancy. As was the case in the previous 2025 update, building permit data was primarily used to analyze and estimate residential growth across the city.



Growth in Calgary



Calgary's unprecedented growth continued in 2025, with population increasing by an estimated 48,900 residents, or 3.2 per cent, to an estimated 1,558,700. This was lower than the previous year which saw a population increase of 87,600, although still well above historical averages. Calgary's population growth is projected to cool in 2026 before easing back to historical averages from 2027 onwards as the effect of international migration is anticipated to trend lower.

Total employment growth in the Calgary Economic Region (CER) slowed in 2025 compared with 2024 but remained healthy, falling from 4.8 per cent in 2024 to 3.7 per cent in 2025. The Calgary Economic Region's Real Gross Domestic Product (GDP) is estimated to have increased by 3.1 per cent in 2025. After stronger-than-expected economic growth over the last two years, employment and GDP growth are expected to slow in 2026 and 2027.

Housing starts in The City increased 16 per cent to 23,400 in 2025, compared to 20,200 in 2024. Calgary's housing market has seen relatively high housing starts with an increase in rowhouse, townhome and apartment housing type starts. This significant level of housing growth is expected to stabilize over the next five years, with projections decreasing to 15,400 housing starts by 2030.

Building permit application values reached $7.71 billion in 2025. Of this total, $5.68 billion, or 73 per cent, was for residential development. This represents a decrease from 2024, when total building permit application values were $9.3 billion, including $6.2 billion, or 66 per cent, for residential development. Through prudent management of the housing supply, The City was able to accommodate this rapid growth and continues to enact strategies and policies that promote housing choice across Calgary.

Industrial



A robust industrial sector is key to supporting Calgary's long term economic resilience, creating new jobs, providing services for a growing population, contributing to Calgary's non-residential tax base and providing cash-in lieu contributions to support high school sites. Industrial areas with strong access to transportation and logistics network are the foundation for Calgary's role as an inland port and distribution nexus for Western Canada. The industrial component of the Strategy focuses on enabling nationally competitive and investment-ready industrial development by leveraging Calgary's skilled workforce, strategic location and networks.

The Industrial Action Plan, recently updated and approved by Council in 2025, sets Calgary's direction for industrial growth and outlines key actions. It aims to leverage Calgary's strengths to drive growth in sectors such as agribusiness, logistics and aerospace. The Industrial Action Plan also supports strategic land conversions to residential and commercial development where it makes sense to do so, while maintaining a robust long-term industrial land supply.

Growth and supply

Growth

Calgary industrial market dynamics

The City of Calgary monitors industrial market conditions using data from Colliers, a Canadian-founded real estate advisory firm. Colliers provides industrial statistics for the Greater Calgary Area (GCA) that are publicly accessible, available for many previous years and are consistent in methodology. This report reviews Colliers' GCA industrial market reports for the past four quarters (Q3 2025 to Q2 2026) to highlight key trends that will impact the regional industrial market in the coming year.

Market outlook

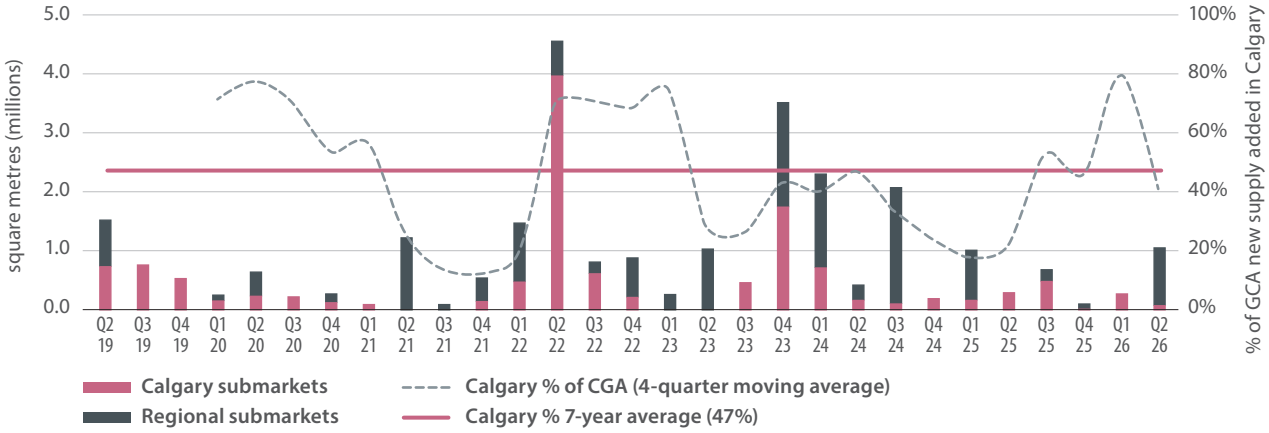
The outlook for the Calgary region's industrial market has improved over the past year. Following a period of softer market conditions, recent quarters have seen stronger activity, buoyed by Calgary's competitive advantage in development costs compared to most other national markets and its expanding logistics infrastructure. These factors, driving interest from local, national, and international businesses, are expected to continue, positioning Calgary among Canada's strongest industrial markets through the remainder of 2026. Industrial construction remained strong, as a total of 200,000 square meters of new industrial space was built throughout the GCA in the past four-quarter period. The total amount of new industrial space built in the past seven years has been remarkably balanced between the Regional submarkets and the Calgary submarkets, with the Region capturing 53 per cent of new construction compared to 47 per cent in Calgary.

The share of total construction captured in the Calgary submarkets has risen above the seven-year average in the past four quarters—a trend not seen since the e-commerce logistics boom of 2022–2023, and one that suggests tempered construction in the Region while it continues to absorb a glut of new supply.

The GCA recorded 386,000 square meters of industrial space absorbed in the past four-quarter period as depicted in Figure 1—a level of absorption not seen since 2022. This result was driven by leasing activity in recently completed developments in the Northeast Calgary and Southeast Calgary submarkets. Demand remained particularly strong for distribution, warehousing and freestanding industrial buildings, while developers continued to introduce flexible small and mid-bay options within larger projects to serve a broad range of users. Vacancy rates in the three Calgary submarkets continued to tighten throughout the past year. The Northeast, Southeast and Central submarkets currently sit at 3.7 per cent, 2.9 per cent and 1.3 per cent respectively, demonstrating continued demand for smaller, flexible industrial spaces.

The share of speculative industrial projects under construction rose from 19 per cent in the third quarter of 2025 to 34 per cent by mid-2026. This indicates that developers and lenders are more confident in future demand. Combined with stable interest rates and improving project economics, these trends support a positive outlook for the industrial market and continued investment across the Calgary region.

Figure 1: New industrial supply added in Greater Calgary Area Q2 2019 to Q2 2026



Industrial land supply

Industrial land inventory

The information in this section comes from the 2026 Industrial Land Inventory Dashboard. New and improved for 2026, the dashboard now tracks all industrial land within Calgary's four industrial sectors: Central, Northeast, Northwest and Southeast and includes information on shovel-ready supply.

Overall, Calgary has a substantial supply of vacant industrial land, but much of it is not ready for immediate development. At the same time, continued conversion of industrial land to other uses is reducing the supply of strategically located employment land. The key priority is to protect appropriate industrial locations and strategically invest in infrastructure and incentives that bring more land to a shovel-ready state. This will help Calgary respond to market demand, boost Calgary's attractiveness for investment and preserve industrial land for future employment.

Five infrastructure services (fire response, mobility, sanitary, stormwater and water) must generally be in place before the land is considered fully serviced and development can proceed. Table 1 shows the amount of vacant industrial land in each industrial sector by servicing status.

Vacant industrial lands are grouped into four servicing categories:

- **Fully serviced shovel-ready:** All five major services are available and an approved Development Agreement is in place.
- **Fully serviced:** All five major services are present.
- **Partially serviced:** One or more services are available, but not all five.
- **Unserviced:** None of the five major services are available.

Figure 2: Industrial areas map

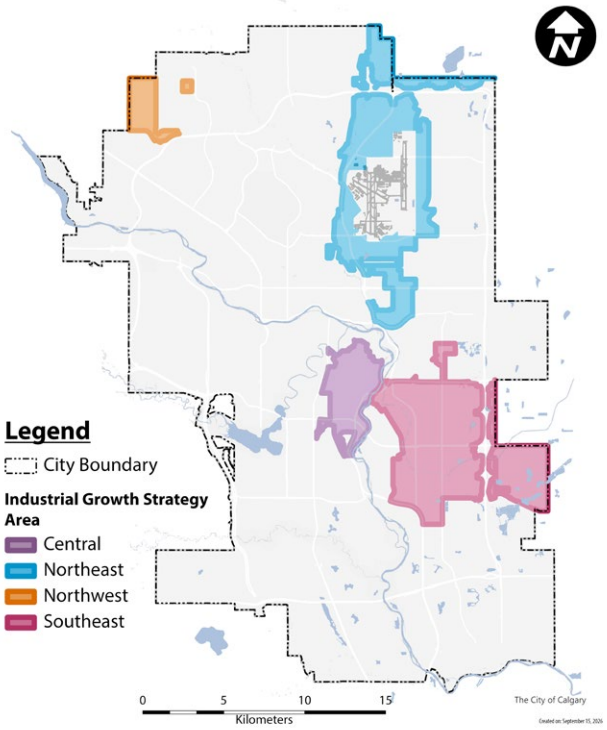


Table 1: Vacant industrial land by servicing status and area

	Central	Northeast	Northwest	Southeast	Total
Fully serviced (ha)	9	300	19	87	415
Fully serviced and shovel-ready (ha)	3	265	19	61	348
Fully serviced and not shovel-ready (ha)	6	35	0	26	67
Partially serviced (ha)	0	184	16	270	470
Unserviced (ha)	0	0	0	23	23
Total vacant (ha)	**9**	**484**	**35**	**379**	**907**

Source: 2026 City of Calgary Industrial Land Inventory Dashboard. NOTE: This table only includes vacant industrial land that has a current industrial land use designation and does not include any vacant land with a S-FUD land use designation that has been identified as potential industrial land in any Area Structure Plans.



Industrial land conversion

In 2025, The City received a significant number of land use redesignation applications for industrial land conversions, totaling 101.7 hectares while only 6.7 hectares were added to the industrial land supply through redesignation. These conversions reflect market interest in converting existing or planned industrial areas to residential and mixed uses. While these conversions provide additional land to meet high housing demand, they risk the permanent loss of strategically located industrial development opportunities.

Most proposed industrial land conversions have occurred in the North and Northeast sectors of Calgary, particularly within areas formerly subject to Airport Vicinity Protection Area restrictions. Significant conversions include lands within the Naato'syinnipi Area Structure Plan approved at Public Hearing on September 9, 2025, which removed approximately 100 hectares of planned industrial land. In 2026, the Stonegate Outline Plan, approved at Public Hearing on May 2, 2026, converted a further 73 hectares. Additional industrial land conversion applications have also been considered within the Keystone Hills Area Structure Plan.

Further pressure on Calgary's industrial land base is anticipated through the ongoing review of the Nose Creek Area Structure Plan, one of Calgary's major industrial planning areas. Applications to redesignate industrial land to enable schools and places of worship are also increasing, risking both the loss of industrial land and compatibility conflicts between industrial and non-industrial activities.

Administration carefully evaluates large-scale industrial land conversion proposals to ensure Calgary maintains an adequate long-term supply of industrial land to support economic growth and competitiveness. The City has supported certain conversion proposals where a clear planning rationale has been demonstrated—for example, where the proposed use aligns with surrounding land use patterns or supports mixed-use or transit-oriented development near future LRT stations. Administration will continue to monitor industrial land conversion trends and assess their implications for industrial land supply, economic competitiveness and fiscal sustainability.

Actions and investment

Industrial incentive programs

The Industrial Development Incentive Program launched on April 30, 2026, to encourage new industrial development within Calgary. The program provides incentives of $235,000 per hectare, up to a maximum of 8.5 hectares per application, utilizing $5 million in Council-approved funding to help offset eligible development costs associated with new industrial projects. Several applications are currently under review.

Council also approved a Greenfield Industrial Land Tax Incentive Program in April 2026. This program provides eligible landowners and developers with a 20 per cent property tax exemption over a three-year period to support the preparation and servicing of greenfield lands for future industrial development.

The tax incentive may be combined with other industrial development programs, helping reduce upfront development costs and supporting investment in Calgary's greenfield industrial areas.

Financial investment

Several major water and wastewater infrastructure projects that support existing and future industrial development are currently in the design phase. These include the Airdrie-Nose Creek Sanitary Trunk Extension, which is required to service both Airdrie and lands within the Nose Creek Area Structure Plan (2026–2030). Additional projects include the Blackfoot Trail Sanitary Trunk Upgrades (2026–2029), the Shepard Sanitary Trunk Twinning (2027–2029), the North Calgary Water Servicing (NCWS) Stage 1 project (2025–2029) and the Mountain View Pump Station upgrades (2025–2027). Together, these investments will improve servicing capacity, reliability and network resilience in key industrial growth areas, helping to support business expansion and future employment lands. However, construction funding remains subject to Council approval through the 2027–2030 Business Plans and Budgets.

Next steps

The 2025 Industrial Action Plan (IP2025-0538), approved by Council on June 24, 2025, identified actions within four groupings that would enable greater industrial development:

1. Modernize policy and focus growth;
2. Invest in infrastructure and servicing;
3. Increase development attractiveness; and
4. Track trends and adjust based on data.

Priority actions for 2026 include:

- Implement the Industrial Development Incentive Program to support new industrial development and increase the supply of shovel-ready industrial land.
- Monitor and analyze industrial land conversion trends, including evaluating their implications for long-term industrial land supply, municipal finances and economic development objectives.
- Pursue funding opportunities for the design and construction of growth-enabling infrastructure investments that support industrial development in the 2027–2030 Business Plans and Budgets.

New communities



Introduction

New community growth continues to play a key role in providing housing for Calgarians and is a critical component of achieving balanced growth across the city. Well-planned new communities make increasingly efficient use of land, provide a wide range of housing choices, support a variety of travel options and offer access to daily amenities and jobs. One of the key goals of the strategy for new communities is to link infrastructure investment with land use and development approvals. This helps ensure that new community growth can be serviced in a way that anticipates the market, is financially sustainable and aligns with the vision of the Municipal Development Plan to provide Calgarians with complete communities.

- Over 2025, The City invested $125.4 million on capital infrastructure projects related to new communities with $66.6 million of this spending supporting growth in the North/Northwest Sectors, $36.1 million in the West Sector, $15.3 million in the East Sector and significant investments in utilities and mobility infrastructure. This spend came from City and off-site levies funding.
- 13,000 homes were issued building permits in Calgary's 40 new communities. This matches the record high in 2024.
- In 2025, eight new Growth Applications were approved, which will supply over 9,100 homes of additional capacity directly in the Growth Applications, but also enable further growth by providing capacity to areas beyond these Growth Applications.

Growth and supply

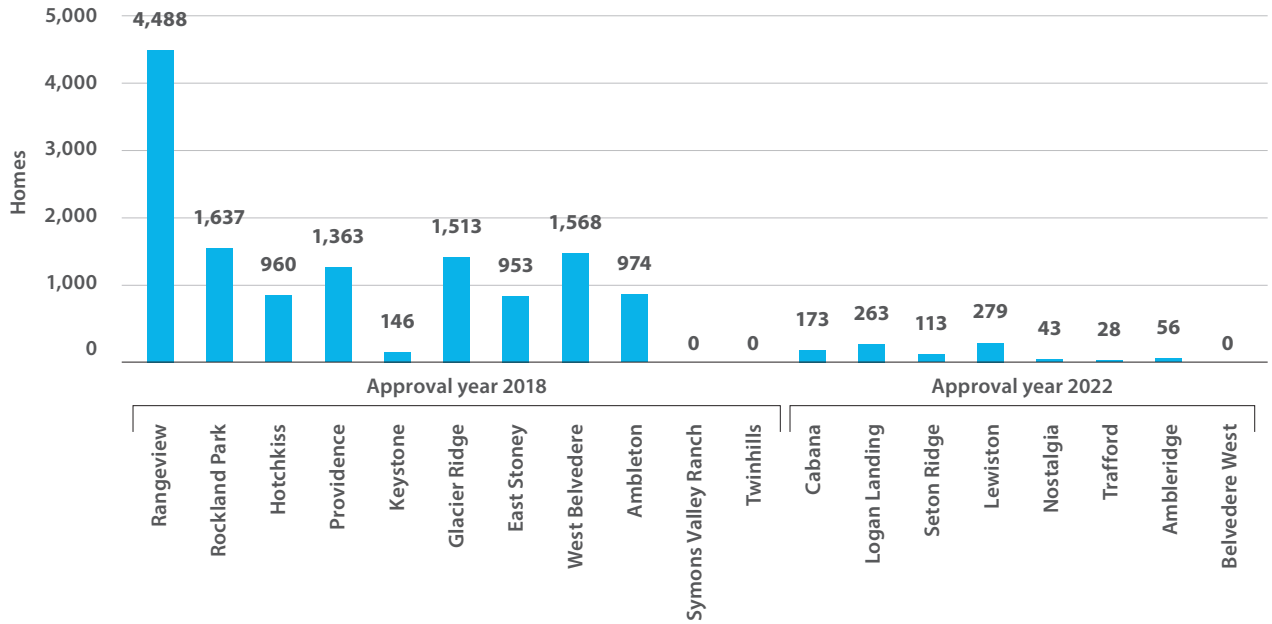
Development Agreements, an indicator of near-term new community growth, increased in 2025 to 645 hectares compared to 486 hectares in 2024. It is anticipated that over 559 hectares of development agreements will be secured by the end of 2025 in new community areas. These represent over $356 million in future off-site levy contributions from developers, to be put towards new infrastructure to support growth.

New communities in Calgary have captured an average of 67 per cent of the citywide total new homes over the last five years, absorbing 56,100 homes or an average of 11,200 homes per year. The North sector accounted for 24 per cent of homes built over the last five years, while the South and Southeast sectors accounted for 21 per cent and 19 per cent, respectively.

Forecasts for 2026–2030 estimate that over 58,000 (11,800 per year on average) homes will be built within new communities across the city. Vacant land supply levels suggest that the North, South and Southeast sectors will continue to accommodate the greatest share of future growth, followed by the Northeast, East and West sectors.

A key reason that annual reporting on growth was initiated was to track development progress in Council approved areas. For the business case areas approved in 2018 and 2022, 14,557 homes or approximately 20 per cent of the homes projected to be built in business case areas have been built out as of May 2026. The process changed from business cases to Growth Applications in 2023. There have been no residential building permits issued in post-2023 approved Growth Applications.

Figure 3: Homes built in business case areas



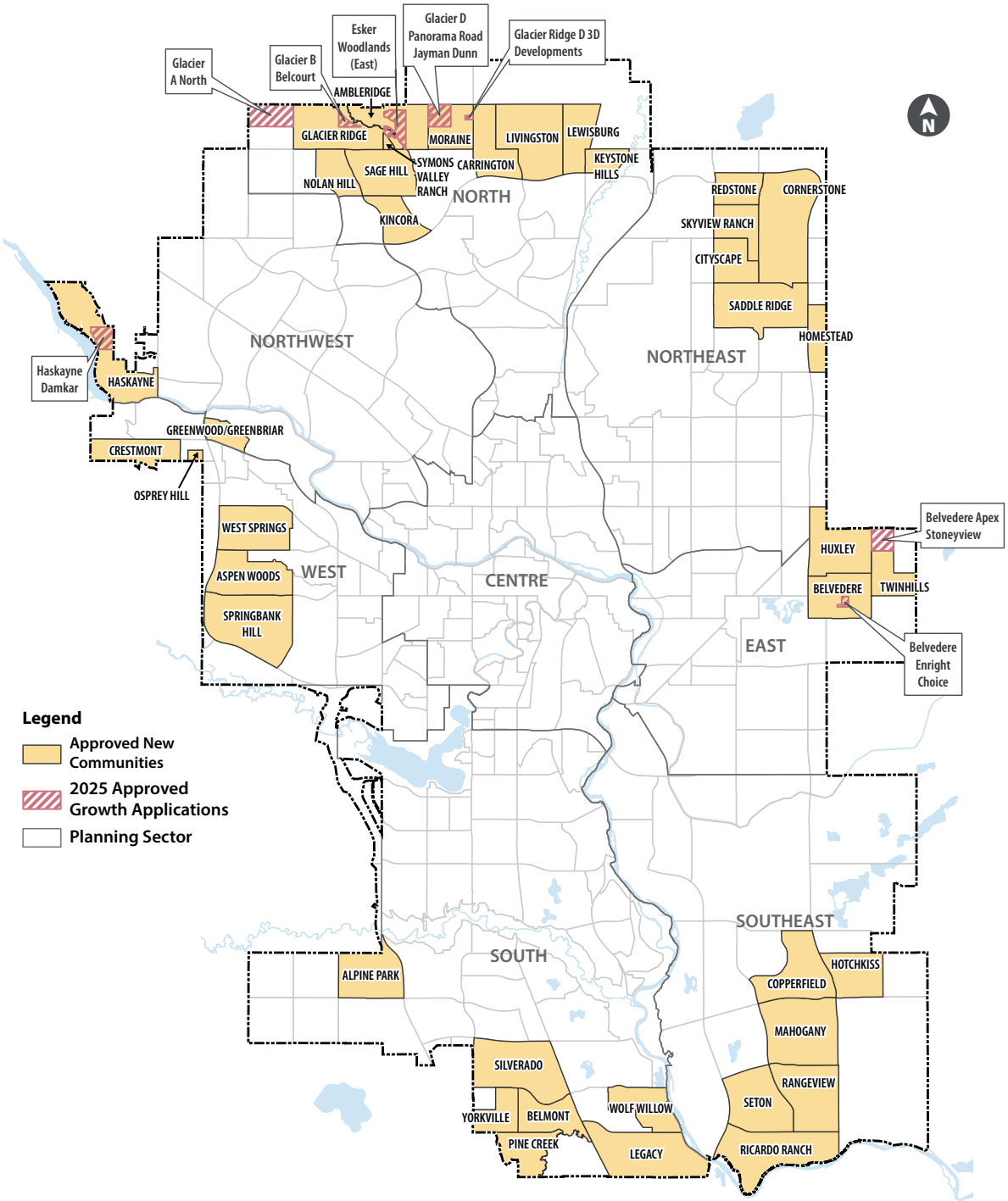


Figure 4: Approved new communities

Figure 4 provides a map of the 40 actively developing new communities in Calgary and includes the eight growth applications approved in 2025.

Actions and investments

Growth-related capital spending was $125.4 million in 2025, with utility infrastructure accounting for the majority. Investment was led by three major water and wastewater projects that support growth in new communities and expand the capacity, reliability and resiliency of Calgary's utility network.

The single largest contributor was the TransCanada Sanitary Trunk ($34.1 million) in the West Sector. Construction began in 2025 on this 8.5-kilometre wastewater trunk, which will increase wastewater servicing capacity for Northwest Calgary, Cochrane, and surrounding growth areas.

Significant investment also occurred in the North Sector through the North Calgary Water Servicing project ($22.7 million). The project is constructing a new 22-kilometre feeder main, pump station upgrades, reservoirs and other supporting infrastructure to deliver additional drinking water capacity to northwest Calgary. Beyond supporting future development, the project improves redundancy within Calgary's water distribution system, helping maintain service reliability during planned maintenance or emergency events.

In the East Sector, the Belvedere Feedermain Phase 1 & 2 ($14.3 million) advanced construction of a new feeder main that will provide clean and reliable drinking water service to the emerging East Belvedere community. The project forms a critical component of the water infrastructure required to support future residential and commercial growth in Calgary's East sector and is expected to be operational in 2026.

Growth-related spending was concentrated in the North ($53.5 million) and West ($35.3 million) sectors. Mobility spending was $17.2 million, driven primarily by the MAX 301 North BRT Extension ($10.3 million), the 144th Ave. N.W. Flyover at West Nose Creek Phase 1 ($3.5 million) and the Stoney Trail/Memorial Drive Flyover ($2.9 million). The increase reflects the completion of key transit infrastructure investments that improve transit service, connectivity and accessibility along the Centre Street corridor.

Additional utility investment was directed toward system expansion and upgrades, including the Inglewood Sanitary Trunk Upgrades Phase 2 ($8.7 million) and Nose Creek Sanitary Trunk Upgrades ($7.9 million). Emergency Response spending increased by $8.6 million, primarily related to the Cornerstone Fire & Emergency Response Station and associated temporary facilities serving growth areas. Collectively, the major projects identified account for $113.9 million, or 90.8 per cent, of the total 2025 growth-related capital spending, highlighting the concentration of investment in a relatively small number of strategic growth-enabling infrastructure projects. These investments complement Calgary's treatment plant infrastructure, which support growth citywide by providing the water and wastewater servicing capacity necessary to sustain housing development, redevelopment, employment growth, and industrial expansion. Significant future investment in treatment facilities is expected as part of upcoming budget cycles, reflecting their importance as long-term growth-enabling infrastructure and a prerequisite for accommodating continued population and economic growth.

Figure 5: 2025 capital spending in new communities by sector and service lines ($000s)

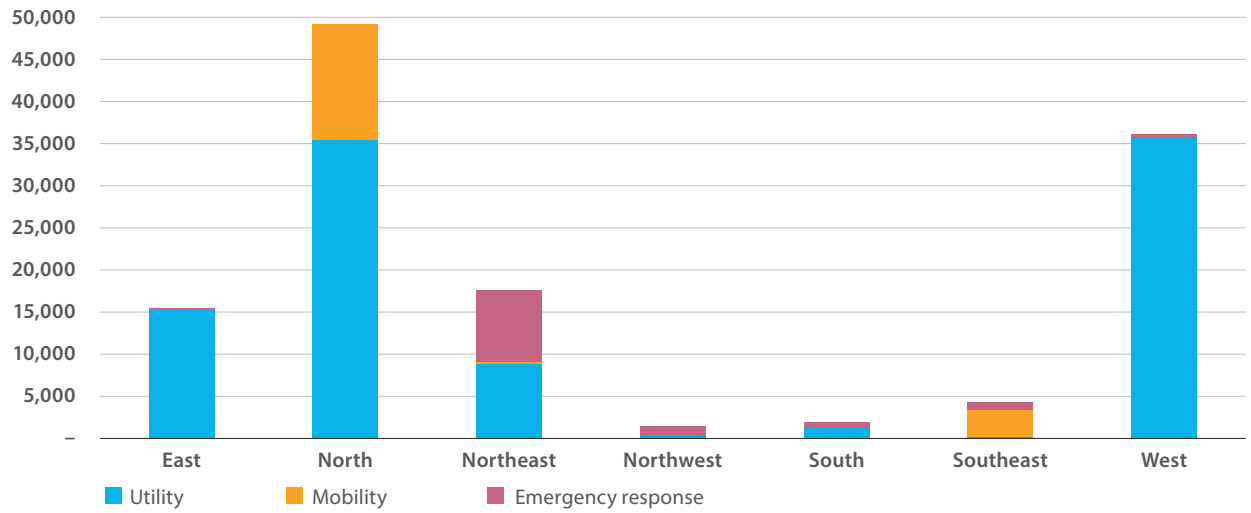


Figure 5 shows the actual capital spending in new communities by sector and by service line, excluding cases where 2025 spending is below $0.1 million. In this figure, “utility” represents investments in water, sanitary and storm services.

Figure 6 shows both funded and delivered capital infrastructure projects that are supporting development in Calgary’s new communities.

Figure 6: Citywide Growth Strategy infrastructure investments that enable new communities

Projects not labeled on map

1. Airdrie Meter Chamber Relocation 600mm Feedermain
2. Bearspaw NCWS Pump Station
3. Belvedere Emergency Response Station (Land Acquisition)
4. Big Hill Reservoir Tie In
5. Forest Lawn Creek Improvements Phase 1
6. Glacier Ridge Emergency Response Station
7. Rockland Park Emergency Response Station (Land Acquisition)
8. Haskayne Temporary Response Station
9. Hotchkiss Temporary Response Station
10. Keystone Emergency Response Station
11. Memorial Dr. N.E. & Stoney Tr. Flyover
12. Mountain View Pump Station Capacity Upgrades
13. Stonegate Emergency Response Station
14. Top Hill Reservoir Expansion
15. Valley Ride Pump Station Upgrades (Design)
16. Walden Emergency Response Station
17. Westview Reservoir (Land Acquisition)
18. Yorkville Emergency Response Station

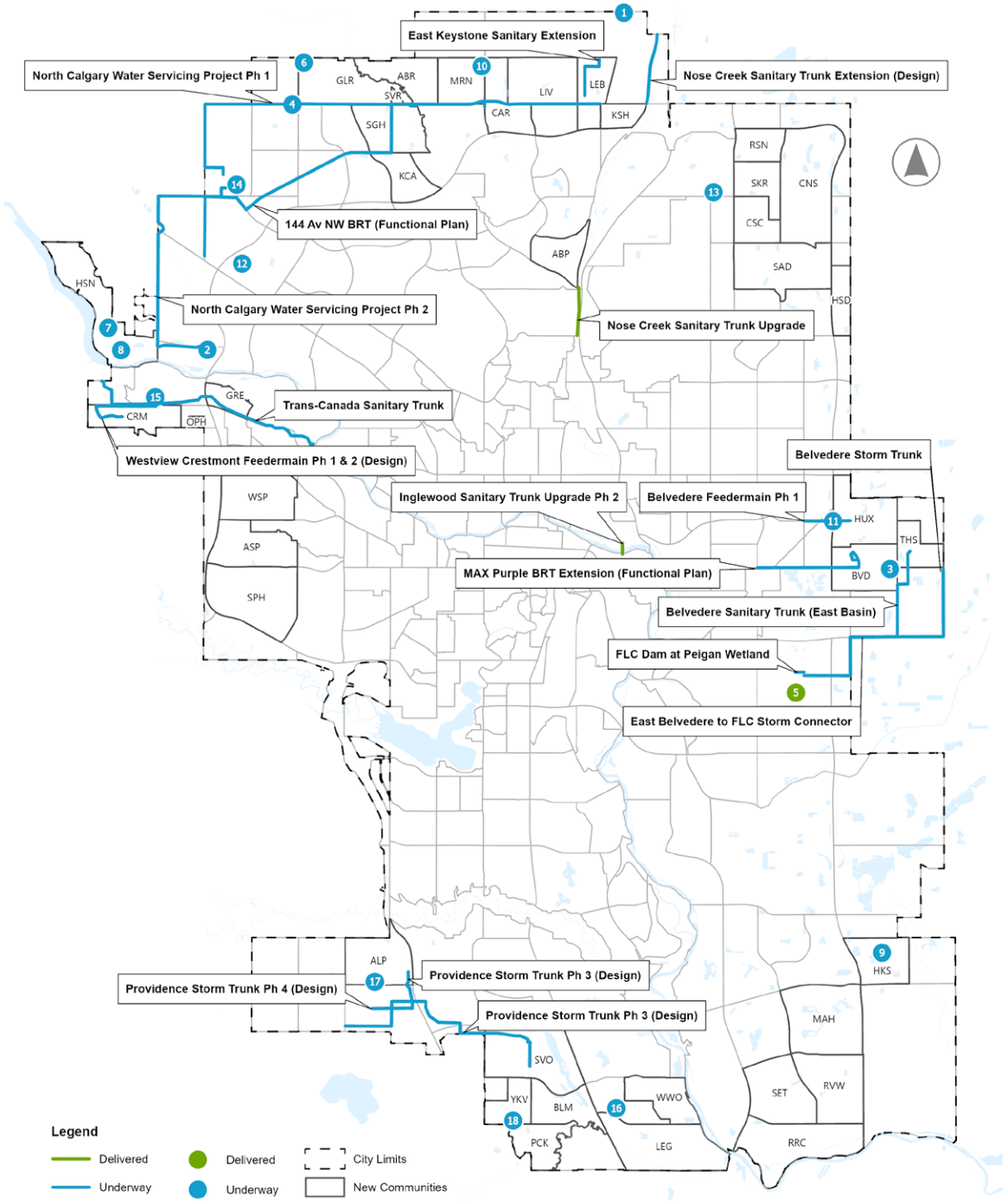


Table 2: 2025 Land supply and building permits by sector

Sector	Homes issued building permits in 2025	Approved serviced land supply (hectares)	Years of approved serviced land supply	Approved, not yet serviced land supply (hectares)	Years of approved, not yet serviced land supply
North	2,623	890	9 to 13	395	5 to 6
Northeast	1,513	219	5 to 6	106	2
East	788	50	3	395	12 to 17
Southeast	2,563	726	9 to 12	62	1
South	3,310	372	5 to 7	242	3 to 4
West	1,583	250	7 to 9	0	0
Northwest	638	154	7 to 10	0	0
Total	**13,018**	**2,661**	**7 to 9**	**1,200**	**3 to 4**

Operational growth spending in new communities was $8.1 million in 2025. Transit spent $1.0 million, which came from a re-allocation of resources from cancelled routes or reduced services elsewhere. Spending on streets, sidewalks and pathways and parking increased to $3.0 million from $2.5 million in 2024. Parks and Open Space spending increased to $2.2 million in 2025 from $1.1 million in 2024. The remaining $1.9 million spend was due to Fire and Emergency Response in preparation for new stations in Haskayne and Belmont.

Next steps

Calgary remains well positioned to accommodate short- and medium-term growth in new communities. As of May 2026, the city had approximately 14 to 19 years of planned land supply, broadly consistent with the Municipal Development Plan target of 15 years. Approved and serviced land could accommodate approximately 92,100 homes, representing about 2,700 hectares and seven to nine years of supply. A further 43,000 homes can be accommodated on approximately 1,200 hectares of approved—not yet serviced land, adding an estimated three to four years of supply. With serviced supply above the Municipal Development Plan target, additional approval should be tied to sector-specific demand, infrastructure availability and financial capacity.

This capacity increased despite a record 13,000 homes receiving building permits in new communities in 2025, as shown in Table 2. The largest shares were in the North, South and Southeast sectors. With forecast demand expected to ease from recent levels, the growing inventory of approved land increases the importance of aligning future growth approvals and infrastructure investments with market conditions. An oversupply of development capacity can contribute to slower community buildout, inefficient use of approved infrastructure and delayed returns on investment for both The City and developers. Administration will continue to monitor housing demand, land supply and servicing capacity in accordance with the Municipal Development Plan to inform recommendations to Council on future growth and infrastructure investment decisions.

Established Areas, Main Streets and Transit-Oriented Development



Introduction

The established areas contain the majority of Calgary's population in diverse communities where the initial construction of homes and businesses is mostly complete. Growth in these areas usually occurs through redevelopment of existing buildings and already developed lands. It allows residents to age in the communities they love and provides choice in homes for people wanting to live in these communities. With many of these communities below their historical peak populations, redevelopment is an efficient way for Calgary to accommodate record levels of growth by leveraging existing amenities and infrastructure and support local businesses.

Several growth initiatives are delivering investments through the Established Area Growth and Change Strategy, Main Streets, Transit-Oriented Development, Utility Redevelopment Programs, and the federal Housing Accelerator Funded Utility Pilot Programs:

- Since 2020, the Established Area Growth and Change Strategy has allocated $66 million in City funding and $14 million in funding from the federal Housing Accelerator Fund to 33 public space improvement projects. Projects like Sandy Beach improvements, Pumphouse Park and Kensington Plaza are highly valued by communities and deliver upgrades aligned to growth (see also Table 4). The new grant funding made available to local communities and business areas enable them to champion their own public space improvements as their communities grow and change.
- Since 2020, the Main Streets Program spent $120 million in four completed streetscape projects with two more to be completed in 2026 (37th St. S.W., 17th Ave. S.W., Montgomery, Marda Loop, Memorial Parkway and Bridgeland). These projects were funded by both City budget and the federal Housing Accelerator Fund. As a result, from 2020 to 2024, $50 million in new building permit value was approved in completed Main Streets and people felt safer and more connected while supporting local businesses.
- The Transit-Oriented Development Program is deploying $20.5 million provided in the 2023–2026 Service Plans and Budgets plus $12.5 million from the federal Housing Accelerator Fund. This supports public realm improvements like parks, sidewalks and crossings when new homes are built next to transit.
- The City is investing $28.5 million through the Utility Redevelopment Programs in the 2023–2026 budget cycle to deliver 23 water, sanitary and stormwater projects, complemented by $29.7 million through Housing Accelerator Fund utility pilots to address site-specific power, water, sanitary and stormwater barriers to new housing in established areas. These investments improve infrastructure needed to support local growth and help lower financial risk of redevelopment projects.

Growth and supply

Calgary's established areas comprises more than 160 communities. The high volume of issued building permits in the established areas offers insight into the pace of growth and change. In 2025, there were 1,220 building permits issued for 9,697 new homes, of which 6,850, or 71 per cent, were for multi-residential. This is a 93 per cent increase in 2025 from 2024 for total new homes per year. Annual totals can be seen in Figure 7.

Figure 7 also shows established area new homes by building type. Apartments dominate in the established areas but missing middle types, such as row houses and town houses, have seen a significant increase compared to previous years, providing additional housing choice in these communities.

In this update, "established areas" refers to the land within the Balanced Growth Boundary identified in the Municipal Development Plan and aligns with the Established Area Growth and Change Strategy. "Redeveloping areas" include the established areas and residential communities completed since 2009 that are no longer considered new communities, defined as having fewer than 50 vacant single/semi-detached lots and 250 vacant multi-residential units. Redeveloping areas exclude communities included in the Suburban Residential Growth report and all non-residential areas. Consequently, established areas and new community totals many not fully align with citywide totals. Limited residential development in industrial communities is also excluded from the three categories.

New single and semi-detached homes are primarily occurring in the older communities built in the 1950s or earlier as those communities continue to redevelop. New multi-residential homes are being built across

Figure 7: New homes in established area by type

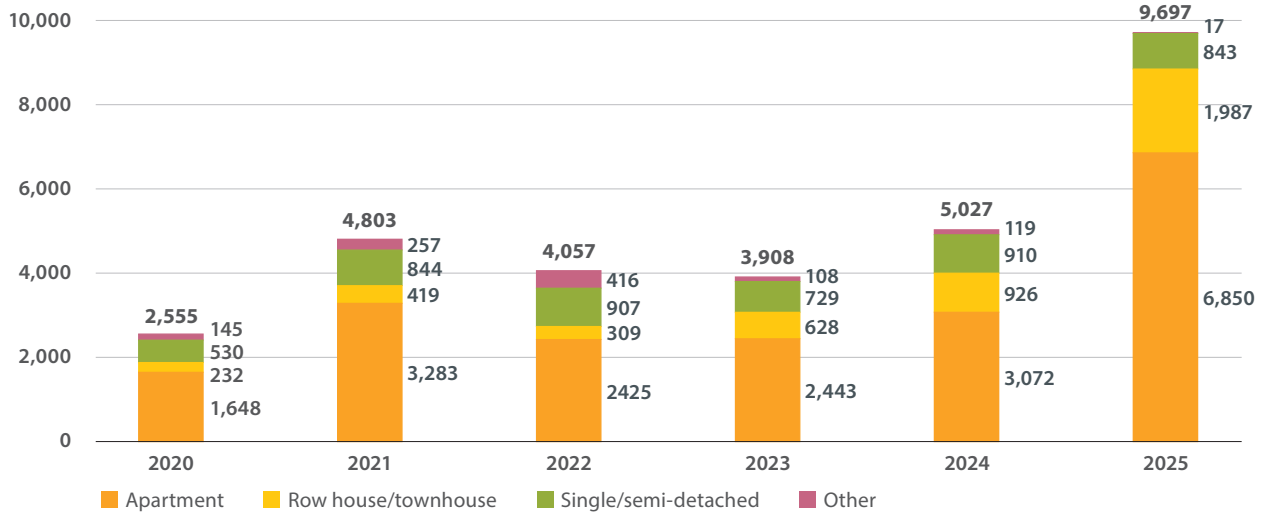
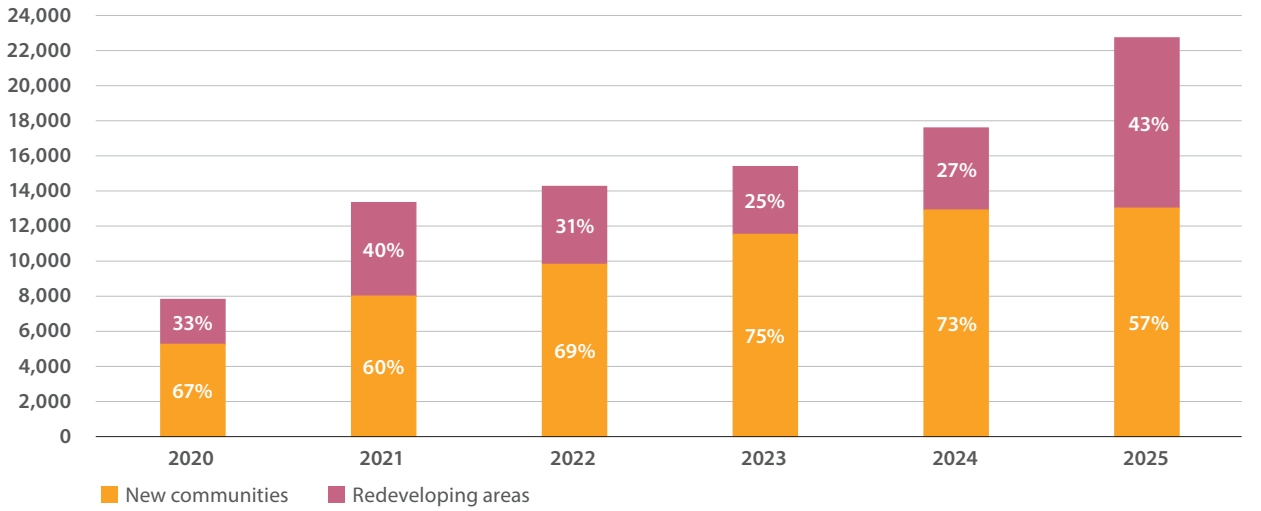


Figure 8: Five-year total homes citywide based on issued building permit, 2020–2025



the established areas, in older communities like Haysboro (833 new homes), but also in comprehensive developments within the city, such as in University District (576 new homes).

In terms of share, redeveloping areas captured 43 per cent of new citywide housing starts in 2025, which is higher than the 32 per cent five-year average as shown in Figure 7.

In 2025, 487 building permits were issued for new homes in nodes and corridors, including the areas adjacent to Main Streets (150 metres from a Main Street as defined by the Municipal Development Plan) and Transit Station Areas (600 metre radius from a Primary Transit Network Station) outside of the Greater Downtown. This represents 40 per cent of the established areas total.

Strategic investments in Main Street corridors and Transit-Oriented Development nodes helps enable growth in areas near amenities, services and infrastructure, while the Established Area Growth and Change Strategy helps upgrade community amenities and infrastructure in areas receiving growth.

Table 3: Funding deployment for growing established areas, nodes and corridors

	City business plans and budget funding	Federal Housing Accelerator funding	Program total funding	Spent	
	2023–2026 ($ million)	2024–2027 ($ million)	2023–2027 ($ million)	2023–2025 ($ million)	2025 ($ million)
Established Area Growth and Change Strategy	36.0	14.0	50.0	31.5	14.5
Main Streets program	60.0	14.0	74.0	55.8	20.4
Transit Oriented Development program	20.5	12.5	33.0	4.9	2.4
Utility Redevelopment programs & pilot programs	28.0	29.7	57.7	23.0	13.5
Total	**144.5**	**70.2**	**214.7***	**115.2**	**50.8**

*Unspent funds are fully committed to projects already in progress to see them completed through 2027.

Actions and investment

Investment is underway for each area of focus (Main Streets, TOD nodes and growing and changing communities). Projects are outlined in the sections below and include improvements to community amenities like parks, plazas, open spaces and active mobility infrastructure, major streetscape rebuilds along community corridors, local improvements that support housing next to transit and shallow and deep infrastructure network improvements that align with growth as it materializes.

Table 3 provides a summary of funding allocation for established areas growth investment, and the deployment both in 2023–2025 and specifically in 2025. The unspent funding is fully committed to projects already in progress to see them completed through 2027. All funding is committed to projects already in progress. The unspent amount will be used as those projects continue and are completed.

Council's 2023–2026 investment in growing established areas also included $40 million for pathway and bikeway improvements, $20 million to help realize the vision of new Local Area Plans and funding for Calgary Municipal Land Corporation (CMLC) to advance transit-oriented communities. These initiatives are led outside of the Citywide Growth Strategy.

Established Area Growth and Change Strategy

The Established Area Growth and Change Strategy (EAGCS) is helping growing communities alleviate growth pressures by:

1. Delivering high-quality public amenities that are valued by the community and businesses and provide new ways to enjoy and move through their communities, and
2. Introducing a new grant program in 2025 for community groups in higher growth areas to lead their own amenity improvement projects.

This initiative uses a collaborative and data driven approach to identify which established communities are experiencing the most growth, and where short-term growth is anticipated. Since 2020, the Established Area Growth and Change Strategy has allocated $66 million in City funding and $14 million in funding from the federal Housing Accelerator Fund to 33 public space improvement projects (see also Table 3). These projects focus on community need and use engagement to deliver a broad range of parks, mobility and recreation projects. By the end of 2026, $42 million will have been spent to complete 22 community improvement projects in support of local growth and change. These include improvements to local parks, updated plazas, new multi-use pathways, community gardens, fitness equipment, playgrounds, fire pits, outdoor furniture and natural play spaces and vegetation, as shown in Table 4.

From 2023–2026 the program was very active, with most projects completing during this time, and the commencement of eight additional projects in 2025. The focus area for investment was also updated in spring 2026 as a result of regular growth monitoring for redeveloping communities. Funding for continuing this program through the construction of current projects and initiating new projects is being requested through the 2027–2030 Business Plans and Budgets process.

In 2025 the Growing Spaces Project and Grant Program was launched. This application-based program provides up to $50,000 for a Community Association or Business Improvement Area to improve a public space in their community that helps address growth. The program has conditionally approved $400,000 out of $500,000 available funding and has delivered $50,000 to community groups to begin their improvement projects.

Table 4: Summary of EAGCS public space improvement projects

Completed EAGCS projects		
Program years	**Number**	**Project examples**
2021–2022	2	17th Ave. Crowchild Bridge Pedestrian Improvement, 40th Ave. N.E. Park Redevelopment, missing link pathways, partnering to deliver Mills Park and Jack Long Park
2023–2025	18	Sandy Beach Public Realm and Connectivity Enhansement, Pumphouse Park and Pathway Improvements, Sunalta Community Hub Building, Buckmaster Park Revitalization, Balmoral Circus New Park and Open Space, Kensington Plaza Placemaking, Forest Lawn Community Centre Park, Dover Neighbourhood Streets Pedestrian and Traffic Improvements.
2026	2	19th St. N.W. (south portion) Streetscape, Munro Park Community Upgrades
Completed EAGCS projects		
Status	**Number**	**Project examples**
Under construction	2	26th Ave. S.W. Mobility Improvements, Richmond Green Park Redevelopment
Project design and planning	9	Crescent Road Traffic and Mobility Improvements, Killarney Park Revitalization, Banff Trail Park Redevelopment, 45th St. S.E. Park, Barlow-Max Bell Pathway Improvements and New Plaza, Mount Pleasant New Public Plaza, Bowwood New Community Park, 19 St. N.W. (north portion) Multi-Use Pathway, Lindsay Park-Rouleaville Square Connection

In addition to upgrades in public spaces and amenities, $12.4 million of water main upgrades were provided through the Water Redevelopment Program from utility rates in support of growth in Marda Loop, Inglewood, Kensington, Manchester, Westbrook, and North Hill. $2.7 million of sanitary main upgrades were provided through the Sanitary Redevelopment Program, from utility rates, in support of growth in Fairview/Kingsland Albert Park/Radisson Heights (Franklin TOD) and Westbrook.

Recent surveys have shown very positive results for projects undertaken by the Established Area Growth and Change Strategy. Over 90 per cent of local residents indicated a positive impact on quality of life, and over 80 per cent indicated that the projects were meeting the needs of the community. Local businesses and developers highlighted placemaking, social interactions, safety improvements, city building and improvements to the City's reputation as key outcomes for these types of projects.

Main Streets program

The Main Streets program focuses on upgrading streetscapes in the heart of established communities. These investments create more vibrant, accessible, and resilient communities by:

- Attracting private investment that builds new housing and commercial areas,
- Creating welcoming public spaces that strengthen community connections and enhance local businesses,
- Improving safety, comfort and accessibility for people of all ages and abilities, and
- Modernizing infrastructure to support future growth, improve environmental performance and increase resilience to climate-related events.

Since its inception the Main Streets Program has received a total of $120 million in City funding. In the 2023–2026 Service Plans and Budgets, the Main Streets program received $60 million to support active construction projects in Bridgeland (1st Ave. N.E.) and Marda Loop (33rd/34th Ave. S.W.), undertake masterplans in the next set of priority Main Streets and the sustainment of a metrics program to measure the impact investments are having on Main Street areas and partnership opportunities with development. A further $14 million of Main Streets funding was provided through the federal Housing Accelerator Fund in support of Marda Loop construction. $4.3 million in stormwater improvements through the Stormwater Redevelopment Program were funded to support growth along Main Street corridors of Marda Loop, Bridgeland, and Inglewood/Ramsay.

The Main Streets Program has worked with builder, business and community interests to update the program's approach and actions. Redevelopment activity was monitored in project areas and surveys clearly demonstrate that the improved design increases citizens' feelings of pedestrian safety, accessibility satisfaction, sense of community belonging and increased social interaction along the street. These improvements support businesses in these areas, attract business traffic, and create spaces of community character and gatherings.

However, businesses and residents expressed concerns about the impacts of construction, reduced visits to commercial areas, and limited community access, during the delivery of the Marda Loop and Bridgeland projects. The Main Streets Program continues to improve project delivery with changes to construction methods, providing off-street parking during construction and maintaining City staff on project sites to provide information.



Transit-Oriented Development program

The Transit-Oriented Development Program invests in high-quality vibrant and active community hubs, public spaces and development opportunities that support housing, jobs, services and amenities near LRT and BRT stations across Calgary. Established in 2020, the Program implements the Council-approved Transit-Oriented Development Implementation Strategy (PUD2019-1515) by removing barriers to redevelopment through planning, policy, partnerships and investments that support transit-oriented growth and improve public spaces and infrastructure. The Program is working with Transit, Real Estate & Development Services and Calgary Municipal Land Corporation (CMLC) to align actions towards achieving Transit-Oriented Communities citywide and leveraging each other's strengths and contributions. Efforts are focused on priority and market-ready stations where City actions can help realize local housing development.

The Transit Oriented Development Program received $20.5 million through the 2023–2026 Service Plans and Budgets, plus $12.5 million from the federal Housing Accelerator Fund. Additionally, $0.9 million of sanitary main upgrades were provided through both the federal Housing Accelerator Fund and the Sanitary Redevelopment Program, from utility rates, in support of TOD growth in Albert Park/Radisson Heights (Franklin TOD).

Notable projects

Recently this program has specifically supported mixed-use growth in Inglewood and Ramsay by improving local streetscapes, parks and pathways in the area around the future Green Line LRT Station. Streetscape construction in Ramsay is substantially complete and construction in Inglewood is underway. The program

is also leading upgrades to the southbound and northbound 26th Ave. & Crowchild Tr. S.W. MAX BRT stations to support local growth, including new housing coming to the former Viscount Bennett school site, alongside a voluntary contribution from the developer.

A recent focus has also been on the Franklin LRT Station south Park and Ride lot. Site planning and land use approvals are complete and a housing provider has applied to develop 350 mixed-market homes. The initial phase of construction of the local public space improvements, which includes a redesigned bus terminal, park space and streetscape improvements started in September 2026. In addition, $0.9 million is being provided through the federal Housing Accelerator Fund and another $0.8 million in the future from the Sanitary Redevelopment Program for sanitary main upgrades in support of this growth. To support future redevelopment opportunities on other City-owned land there is additional feasibility, planning and design work underway with a budget request for funding in 2027–2030.

Utility infrastructure investment

Power, water, sanitary and stormwater infrastructure is essential to enabling redevelopment and accommodating new housing in Calgary's established areas. The City supports this growth through a combination of proactive, utility rate-funded system upgrades and targeted Housing Accelerator Fund pilot programs that help address infrastructure barriers.

Funded through utility rates, the Utility Redevelopment Programs support growth by upgrading water, sanitary and stormwater systems. With a total investment of $28.5 million in the 2023–2026 budget cycle, 23 projects will have been delivered. Through the Water Redevelopment Program, $12.4 million has been invested in 10 water main upgrades to support growth in Marda Loop, Inglewood, Kensington, Manchester, Westbrook and North Hill. Through the Sanitary Redevelopment Program, $2.7 million has been invested in three sanitary main upgrades to support growth in Fairview/Kingsland, Westbrook and Albert Park/Radisson Heights. The City will have completed 30 local water and sanitary upgrades since the program began in 2015 and nine stormwater projects that improve retention in established areas. These programs are strategically coordinated to maximize impact and ensure they align with growing areas. For example, in Marda Loop, water and stormwater upgrades were completed during the Main Streets streetscape project to increase infrastructure capacity for local growth.

Federally-funded Housing Accelerator Fund utility pilot programs complement these proactive City investments with $29.7 million to help address infrastructure requirements that can make otherwise viable housing projects more difficult or costly to deliver. This includes overhead-to-underground power conversions, local water and sanitary network improvements, stormwater main extensions, and on-site stormwater retention requirements for multi-residential projects. Together, these investments are supporting 6,789 new homes.

Next steps

Through the Established Area Growth and Change Strategy, the Main Streets Program and the TOD Program, The City is delivering public realm and infrastructure projects that help support growing established communities. As City priorities are set for the 2027–2030 Service Plans and Budgets, these programs have proposed meaningful and ongoing community improvements to support existing and future residents and businesses. With record levels of growth in Calgary, and a goal for balanced citywide growth across new and established communities, continued support for these initiatives is warranted to ensure these communities remain attractive and welcome places to live.

Conclusion



Calgary continued to experience strong population and housing growth in 2025, reinforcing the need for coordinated planning and investment across industrial areas, new communities and established areas. As growth moderates from recent record levels, the Citywide Growth Strategy will continue to support housing choice, economic development and complete communities by aligning infrastructure investment with changing market conditions and long-term financial sustainability. The findings in this update will help inform growth-related priorities and investment decisions through the 2027–2030 Business Plans and Budgets. Maintaining this balanced approach will help Calgary remain a prosperous, resilient and livable city.

Production Tag

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