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Suburban Residential Growth 2022-2026

Monitoring growth and change series

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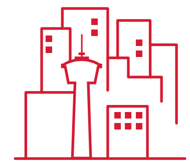
Executive Summary

The Suburban Residential Growth 2022-2026 report provides key information on the dynamics of Calgary's new community housing market and specifically looks at existing land supply for residential growth over the next five years. It provides an in depth analysis of the developing areas broken down by sector including information on servicing status and requirements, near term forecasted growth patterns, total planned land supply capacity and categories of the planned land supply: growth management overlay in place, approved – yet to be serviced and approved - serviced land.



High inflation and rising interest rates along with supply issues are expected to affect the housing market.

This document relies upon housing growth forecasts provided by The City of Calgary's Corporate Economics division, industry input, local area plans, and the goals outlined in the Municipal Development Plan. Estimates for housing and population for Calgary were produced in Spring 2022. The forecasts estimate that 55,700 dwelling units will be built between 2022-2026 averaging 11,135 dwelling units (4,476 single/ semi and 6,660 multi) per year. Calgary's population increase for the same period is estimated to be 110,200 people for an average of 22,040 people per year. In this forecasted period, new communities are anticipated to capture 33,305 units. New communities continue to be the leading growth location for new housing and population in Calgary.

Over the last five years, new communities have captured an average of 63 per cent of the city wide total units, absorbing 31,804 units (16,438 single/semi and 15,366 multi) or an average of 6,361 units per year.

The Municipal Development Plan identifies two major targets for developing areas. The first target aims to maintain up to a 15 year supply of Planned Land (area structure plans in place). The other is to ensure 3 to 5 years of serviced land exists and is available with City infrastructure capacity in place to accommodate development. Years of supply is determined by comparing forecasted average annual housing growth for the next five years against existing planned land supply. The years of supply can be found in Table 5 broken down by single/semi and multi providing detail based on sector and housing type. The information provided is in alignment with the information brought to Council as part of the Citywide Growth Strategy report.

Planned Land Supply: As of April 2022, the planned land supply (areas with an approved Area Structure Plan) is able to accommodate 174,010 dwelling units (91,491 single/semi and 82,519 multi). This can accommodate 483,463 people at full build-out and provides an estimated 7,103 hectares and 22 to 31 years of land supply. The planned land supply is broken down into three categories considering current servicing status and funding: growth management overlay in place, approved – yet to be serviced and approved – serviced.

Growth Management Overlay in Place: Refers to lands where required City infrastructure and/or services necessary to initiate development are not available or have not been committed to by The City, as of 2022 April 30. This category of land supply has capacity for 57,696 dwelling units (34,595 single/semi and 23,101 multi) for 164,985 people and can provide 3,444 hectares and 7 to 10 years of land supply.

On 2022 September 20, City Council directed that all Growth Management Overlays should be removed by Q2 2023 as part of a substantial refresh of new community strategic growth processes. The results of this refresh on The City's land supply monitoring program will be reflected in next year's document.

Approved – Yet to be Serviced: Refers to lands that do not have a Growth Management Overlay either due to its removal or the lands approval prior to the growth management overlay process. This category of land does not have the five infrastructure and services (transportation, water, sanitary, storm and emergency services) in place and can consist of partially serviced and unserviced land. The approved - yet to be serviced land supply is able to accommodate 49,065 dwelling units (25,798 single/semi and 26,267 multi) to house 136,322 people. This accounts to an estimated 1,777 hectares and 6 to 9 years of land supply.

Approved - Serviced: Refers to land that is imminently developable as of December 2022, with capital infrastructure for utilities, transportation and emergency services. The serviced land supply has capacity for 67,249 dwelling units (31,098 single/ semi and 36,151 multi) for 182,156 people and can provide 1,882 hectares or 9 to 12 years of land supply.

The current level of approved land has capacity to address the market demand for the next 15-21 years, but capacity varies at sector level.

These land supply numbers do not reflect the new community decisions associated with the 2023-2026 service plans and budgets.

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1.0 Introduction

The Suburban Residential Growth Report provides comprehensive data and forward-looking information on capacity and forecasting as it relates to land, housing unit and population in Calgary's new communities.

This report provides key information on the dynamics of growth in new communities. The information provided here is used to assist in ensuring short-term (five years) growth capacity is supported by existing and planned municipal infrastructure investments (water, sanitary, storm, transportation and emergency services). It is used to examine the balance between residential land demand and supply over the coming five-year period. The intent is to identify whether a sufficient supply of readily developable land exists, in a variety of locations, to facilitate competitive land and housing markets while maintaining responsible fiscal management of City resources.

This report seeks to provide an accurate picture of new communities, residential development inventory and forecasted growth in the 2022-2026 period. The inventory is prepared in collaboration the City infrastructure departments and is reviewed by BILD Calgary Region.

The report does not contain policy recommendations or explicit budget priorities; its contribution lies in providing a comprehensive information base to support planning, development and City investment decisions in the short-term. The annual updates to this report include:

- land, unit and population inventory as of April 2022 for the residential land supply;
- a review of historical and current development activity in new developing areas;
- housing, population and residential land supply forecasts;
- an assessment of the balance between existing serviced land supply and expected demand; and
- a review of capital infrastructure extensions in geographic sectors.

Annual updates to this report include:

- an inventory (existing and potential capacity) of Calgary's growth capacity in new communities by sector;
- a review of current development activity around the city, by sector and community;
- a forecast of population and housing changes including potential residential land demand; and
- an assessment of balance between existing serviced land capacity and expected demand.

This provides readers with:

- a common information base;
- a detailed yearly analysis of growth dynamics and opportunities; and
- yearly inventory of the serviced land supply to assist in the evaluation of new service extensions.

2.0 The Calgary market

Population

The Calgary Census Metropolitan Area (CMA) had a population of 1,559,400 in 2021 and is projected to increase by 141,200 people to 1,700,600 by 2026. Calgary's population forecast for 2026 is 1,431,500 accounting for 84 per cent of the metropolitan area's total population, which would be an addition of 110,200 people.

Housing

In 2021, the Calgary Census Metropolitan Area (CMA) added 15,000 new housing starts. The City of Calgary accounted for 12,700 starts, or 85 per cent of the total region. Over the last five years Calgary averaged 86 per cent of the region's new housing starts. Forecasts for the metropolitan area estimate 68,000 total housing starts over the next five years and Calgary is expected to have 55,700 starts, providing 82 per cent of the regional share. For further understanding of the housing and population forecast dynamics please review the Calgary & Region Economic Outlook 2022-2027 report available on The City of Calgary web site.

Table 1: Calgary and metropolitan area population and housing

	Historical						Forecast						
Measure	2017	2018	2019	2020	2021	2017-2021	2022	2023	2024	2025	2026	2022-2026	5 Year Average
Calgary Census Metropolitan Area (CMA)													
Population	1,458,300	1,483,500	1,514,500	1,544,900	1,559,400	145,400	1,591,400	1,619,400	1,647,300	1,673,700	1,700,600	141,200	28,240
Housing Starts	11,500	11,000	11,900	9,200	15,000	58,600	14,900	14,000	13,100	12,900	13,100	68,000	13,600
City of Calgary													
Population	1,246,300	1,267,300	1,285,700	1,306,400	1,321,300		1,343,500	1,366,200	1,388,900	1,409,700	1,431,500		
Annual Population Growth	11,100	21,000	18,400	20,700	14,900	86,100	22,200	22,700	22,700	20,800	21,800	110,200	22,040
Total Population Growth %	0.9%	1.7%	1.4%	1.6%	1.1%		1.7%	1.7%	1.7%	1.5%	1.5%		
Net Migration	1,100	11,700	9,600	12,300	6,100	40,800	13,700	14,100	14,100	12,300	13,400	67,600	13,520
Natural Increase	10,100	9,300	8,800	8,400	8,700	45,300	8,600	8,600	8,600	8,400	8,300	42,500	8,500
Total Population Share of Region	85%	85%	85%	85%	85%	85%	84%	84%	84%	84%	84%	84%	
Housing Starts	9,500	9,400	10,600	7,900	12,700	50,100	12,700	11,500	10,500	10,400	10,600	55,700	11,140
City Share of Housing Starts	83%	85%	89%	86%	85%	86%	85%	82%	80%	81%	81%	82%	

Source: City of Calgary: Calgary & Region Economic Outlook 2022-2027

3.0 Growth in New Communities

Absorption by sector 2017-2021

In the last five years, residential building permits show that there were for 50,801 total new units (single/semi detached and multi-residential) city-wide, representing 10,160 units per year on average.

The new communities in Calgary have captured an average of 63 percent of the city wide total units over the last five years, absorbing 31,804 units or an average of 6,361 units per year.

From a sector comparison, the Northeast captured 26 per cent of the new communities, market over the last five years. This sector was followed by the North and Southeast at 23 per cent and 24 per cent. Together these three sectors captured 73 per cent of all new communities, housing units between 2017-2021.

Table 2: Historical absorption of total housing units, City of Calgary and new communities by sector, 2017-2021

Year	2017	2018	2019	2020	2021	2017-2021	Yearly average
City of Calgary Units	9,025	10,776	9,771	7,963	13,266	50,801	10,160
Previously Completed Communities Units	2,383	4,406	4,232	2,713	5,263	18,997	3,799

Total Units - Historical Absorption of Units into New Communities									
Sector	2017	2018	2019	2020	2021	2017-2021	Yearly Average	Average Historical Share	
	Units							5 year	2 year
NORTH	1,698	1,360	1,753	1,065	1,785	7,661	1,532	24%	21%
NORTHEAST	1,822	1,922	1,403	1,353	1,789	8,289	1,658	26%	24%
EAST	0	0	0	0	80	80	16	0%	1%
SOUTHEAST	1,935	1,647	890	1,089	1,875	7,436	1,487	23%	22%
SOUTH	769	968	1,003	1,135	1,464	5,339	1,068	17%	20%
WEST	405	443	381	580	745	2,554	511	8%	10%
NORTHWEST	13	30	109	28	265	445	89	1%	2%
TOTAL	6,642	6,370	5,539	5,250	8,003	31,804	6,361	100%	100%
SHARE of city total units	74%	59%	57%	66%	60%	63%		63%	63%

Information is based on issued annual building permits from January 1 to December 31
Source: City of Calgary: Planning & Development Services

Figure 1: Historical absorption of single/semi units, in new communities by sector

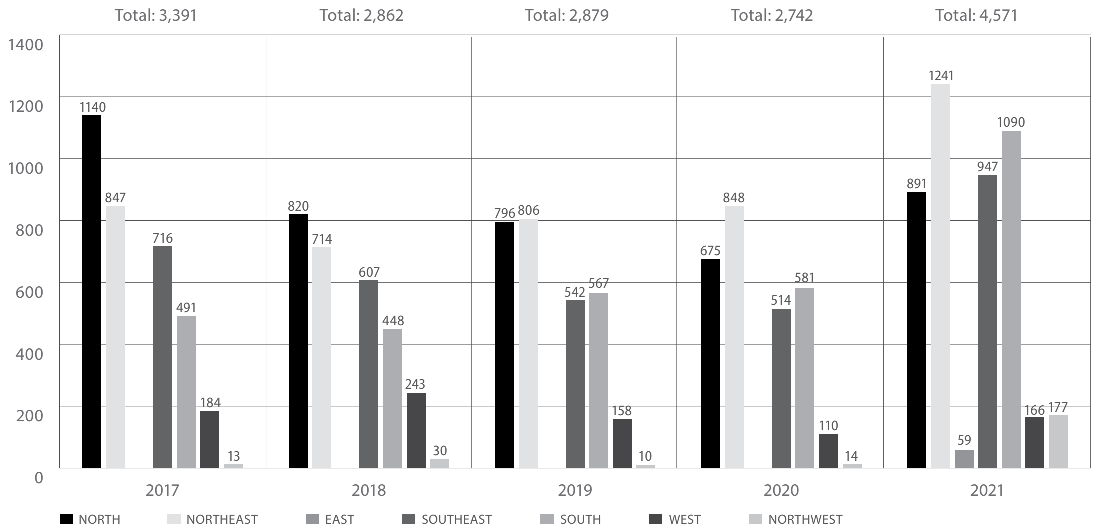
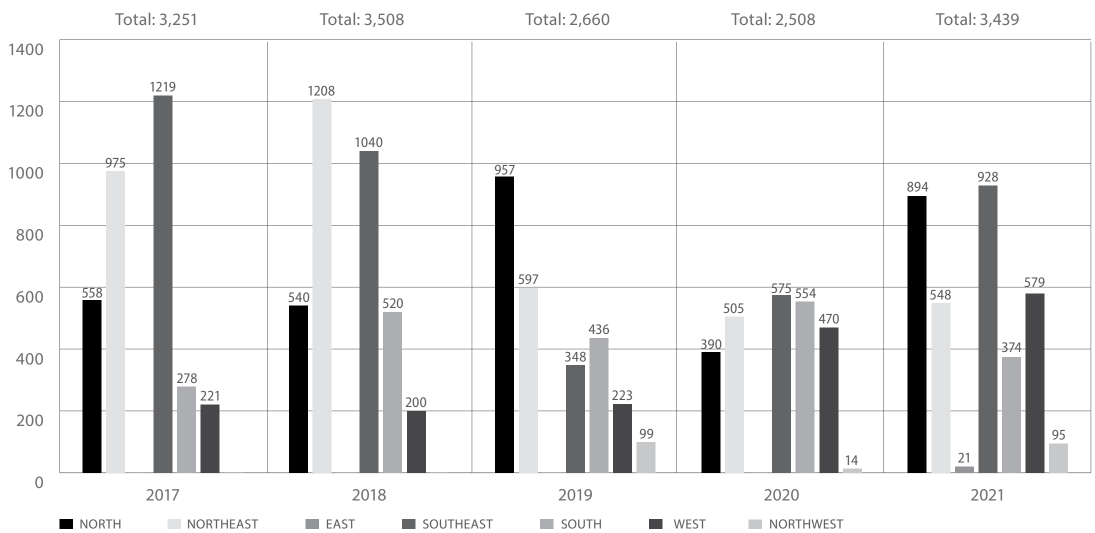
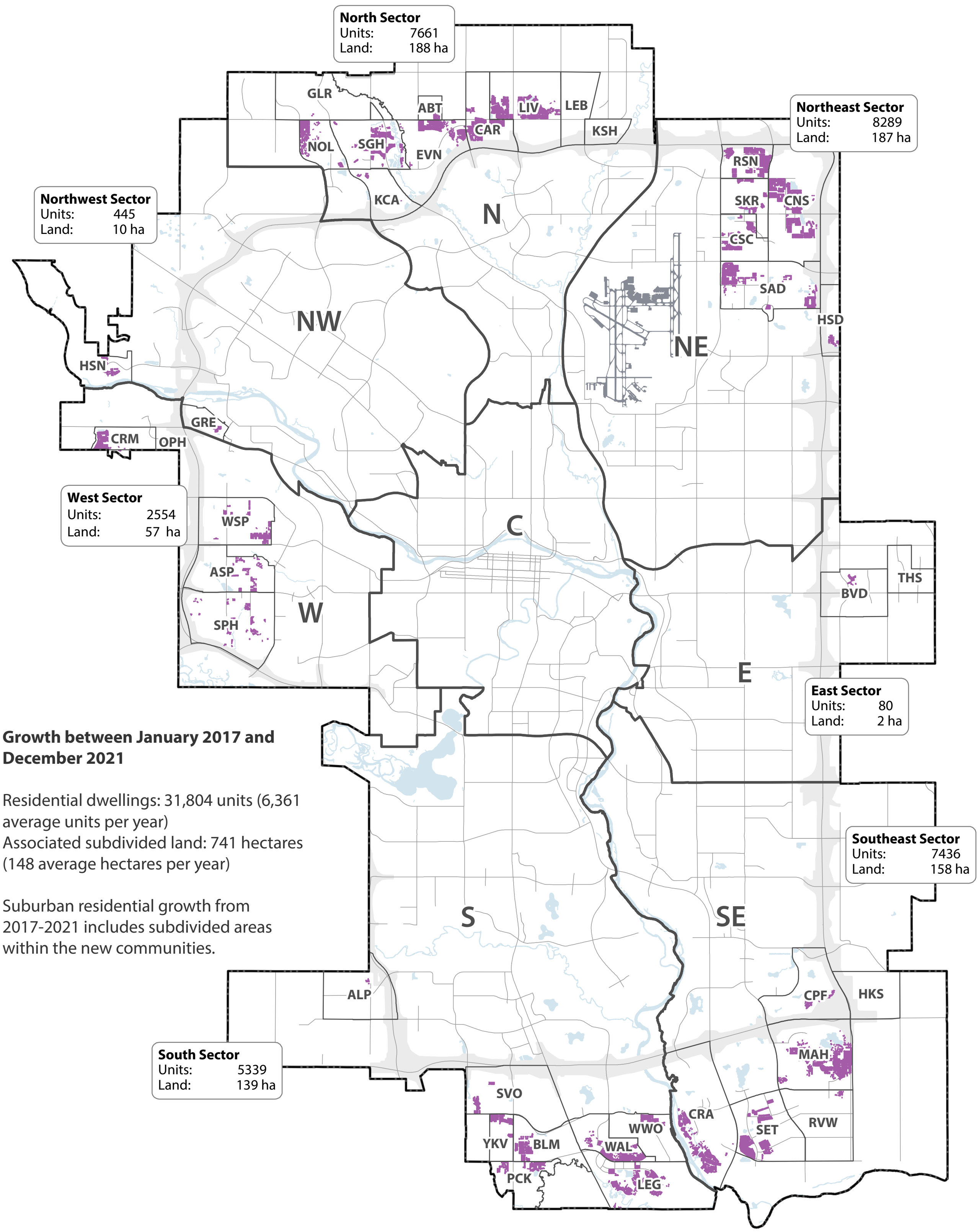


Figure 2: Historical absorption of multi units, in new communities by sector



Map 1: New Community Growth between January 2017 and December 2021



Growth between January 2017 and December 2021

Residential dwellings: 31,804 units (6,361 average units per year)
Associated subdivided land: 741 hectares (148 average hectares per year)

Suburban residential growth from 2017-2021 includes subdivided areas within the new communities.

Forecast by sector 2022-2026

Forecasts for 2022-2026 estimate that 33,305 (6,661 units per year average) of combined single/semi and multi-residential units will be absorbed within the new communities in the seven sectors. This is an increase of 5 per cent compared to the last five years, annual average of 6,361 units.

On a sector basis, the forecasts of total units (single/semi detached and multi-residential) suggest the North, Northeast, Southeast and South will capture between 21 percent and 23 per cent each, making up 87 per cent of the total growth share within new communities. The East and Northwest sectors are predicted to increase their share as new communities in these sectors mature in their development while the West sector will decrease its share compared to its historic two year average as land supply decreases.

Over the next five years, suburban housing starts are expected to be 6,661 units per year, which is 5 per cent higher than the last five years, annual average of 6,361 units.

87 per cent of new communities, housing growth is expected to be in the North, Northeast, Southeast and South sectors.

3,884 single/semi units are expected on average each year over the next five years, compared to the last five year average of 3,288 single/semi units.

Table 3: Forecast estimates of total units 2022-2026, City of Calgary and new communities by sectors

Year	2022	2023	2024	2025	2026	2022-2026	Yearly average
City-Wide Forecast (Total Units)	12,700	11,500	10,500	10,400	10,600	55,700	11,140

Total Units - Forecast Estimates for Growth into New Communities										
Sector	Average Historical Share		2022	2023	2024	2025	2026	Forecast Share 2022-2026		
	5 year	2 year	Units					%	Units	Population
NORTH	24%	21%	1,500	1,390	1,410	1,400	1,400	21%	7,100	18,678
NORTHEAST	26%	24%	1,530	1,500	1,490	1,620	1,575	23%	7,715	19,850
EAST	0%	1%	140	330	370	490	630	6%	1,960	5,324
SOUTHEAST	23%	22%	1,530	1,440	1,480	1,440	1,400	22%	7,290	19,042
SOUTH	17%	20%	1,300	1,390	1,420	1,510	1,450	21%	7,070	18,880
WEST	8%	10%	300	310	280	220	220	4%	1,330	3,541
NORTHWEST	1%	2%	110	160	190	190	190	3%	840	2,409
TOTAL	100%	100%	6,410	6,520	6,640	6,870	6,865	100%	33,305	87,724
		Average number of total units and population to new communities each year =							6,661	17,545
SHARE of city total units	63%	63%	65%	65%	64%	65%	65%	65%		

Source: City of Calgary: Planning & Development, Calgary & Region Economic Outlook 2022-2027

Figure 3: Forecast estimates of single/semi units 2022-2026, in new communities by sector

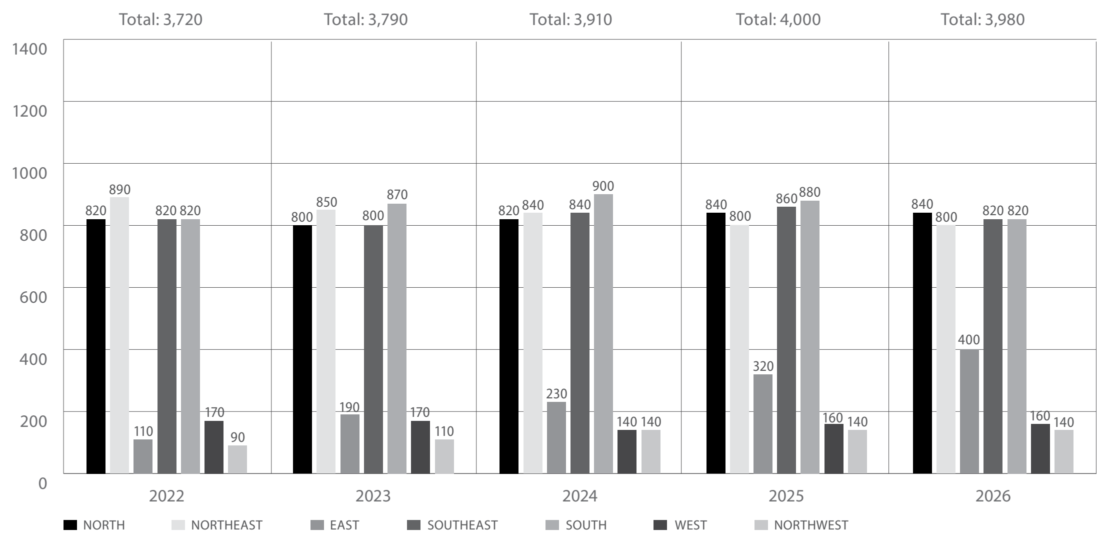
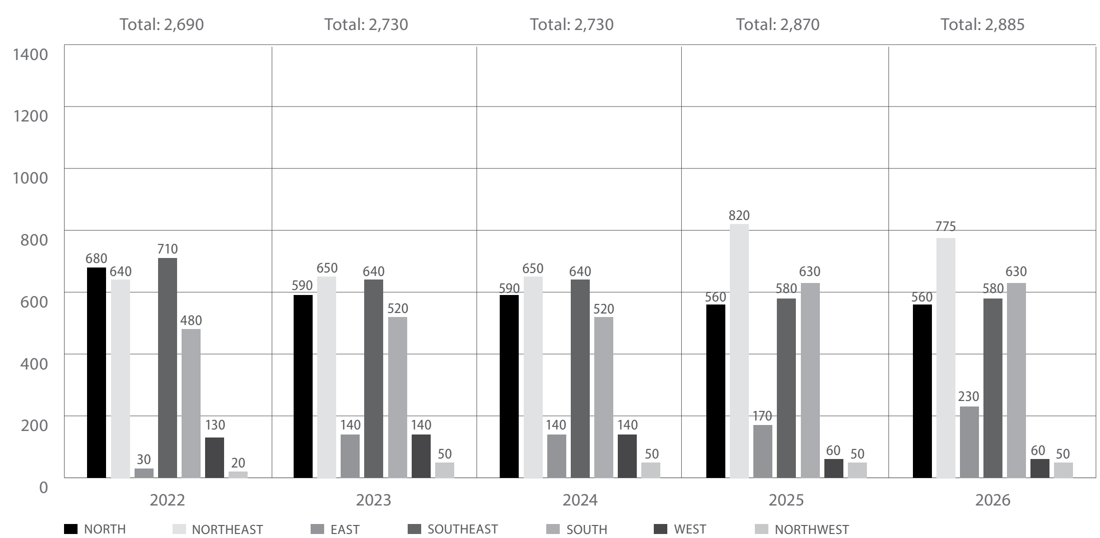


Figure 4: Forecast estimates of multi-units 2022-2026, in new communities by sector



4.0 Planned land supply

Considering current planned land supply, The City has capacity to address the market demand for the next 22-31 years.

Planned land supply includes areas with an approved Area Structure Plan in place as of April 2022. These plans are policy documents that set the basic framework for more detailed land use, school, transportation and servicing components. They are the starting point of any new community development. Currently, there is vacant Planned Land capacity to accommodate 174,010 total units, including 91,491 single/semi and 82,519 multi-residential units on 7,103 hectares of land, which can house 483,463 people at full build out. This provides an estimated 22-31 years of supply.

The planned land supply is broken down into three categories considering current servicing status and funding: Growth Management Overlay in Place, approved – yet to be serviced and approved - serviced.

It is important to note that land supply varies on a sectoral level and at different stages of development.

Growth Management Overlay in Place

Includes vacant planned land that has a growth management overlay on it and may or may not be serviced with no commitments to build the necessary infrastructure. As of April 2022, there is 7 to 10 years of land supply, with a capacity of 34,595 single/semi and 23,101 multi-residential units for 164,985 people. These areas are not expected to have development in the short term.

Approved – Yet to be serviced

Includes areas within vacant planned land where The City has committed to build the necessary leading infrastructure to service this land, but the infrastructure is not in place. There is approved – yet to be serviced land supply to allow development that could accommodate 49,065 total units, including 25,798 single/semi and 23,267 multi-residential units on 1,777 hectares of land. This can house 136,322 people at full build out. This provides an estimated 6 to 9 years of supply.

Approved - Serviced

Includes vacant planned land that has capital infrastructure for transportation, water, sanitary, storm and emergency service capacity to allow for development. As of April 2022, there is 9 to 12 years of approved - serviced land supply, with a capacity of 31,098 single/semi and 36,151 multi-residential units for 182,156 people. These areas consist of subdivided and unsubdivided lands located in new communities without any capital infrastructure constraints for development.

Table 4: Land supply capacity in new communities: planned, growth management overlay in place, approved – yet to be serviced and approved – serviced land as of April 2022

Sector	Total planned land supply [A+B+C]							[A] - Growth management overlay in place						
	Single/semi		Multi		Total		Population	Single/semi		Multi		Total		Population
	Units	Ha	Units	Ha	Units	Ha	Capacity	Units	Ha	Units	Ha	Units	Ha	Capacity
NORTH	25,822	1,249	24,054	676	49,876	1,925	138,131	12,205	658	8,137	438	20,342	1,096	58,179
NORTHEAST	7,812	368	7,055	176	14,867	543	41,301	0	0	0	0	0	0	0
EAST	10,458	526	8,441	381	18,899	906	53,082	6,821	354	4,585	237	11,407	591	32,598
SOUTHEAST	20,407	1,107	14,002	541	34,409	1,648	98,147	8,032	584	5,355	389	13,387	973	38,286
SOUTH	20,220	917	20,410	407	40,630	1,324	111,627	5,734	280	3,823	187	9,557	467	27,333
WEST	3,315	285	5,946	202	9,261	488	24,022	1,070	130	713	87	1,784	217	5,101
NORTHWEST	3,457	184	2,611	84	6,068	268	17,153	732	60	488	40	1,219	100	3,488
TOTAL	91,491	4,635	82,519	2,468	174,010	7,103	483,463	34,595	2,066	23,101	1,378	57,696	3,444	164,985

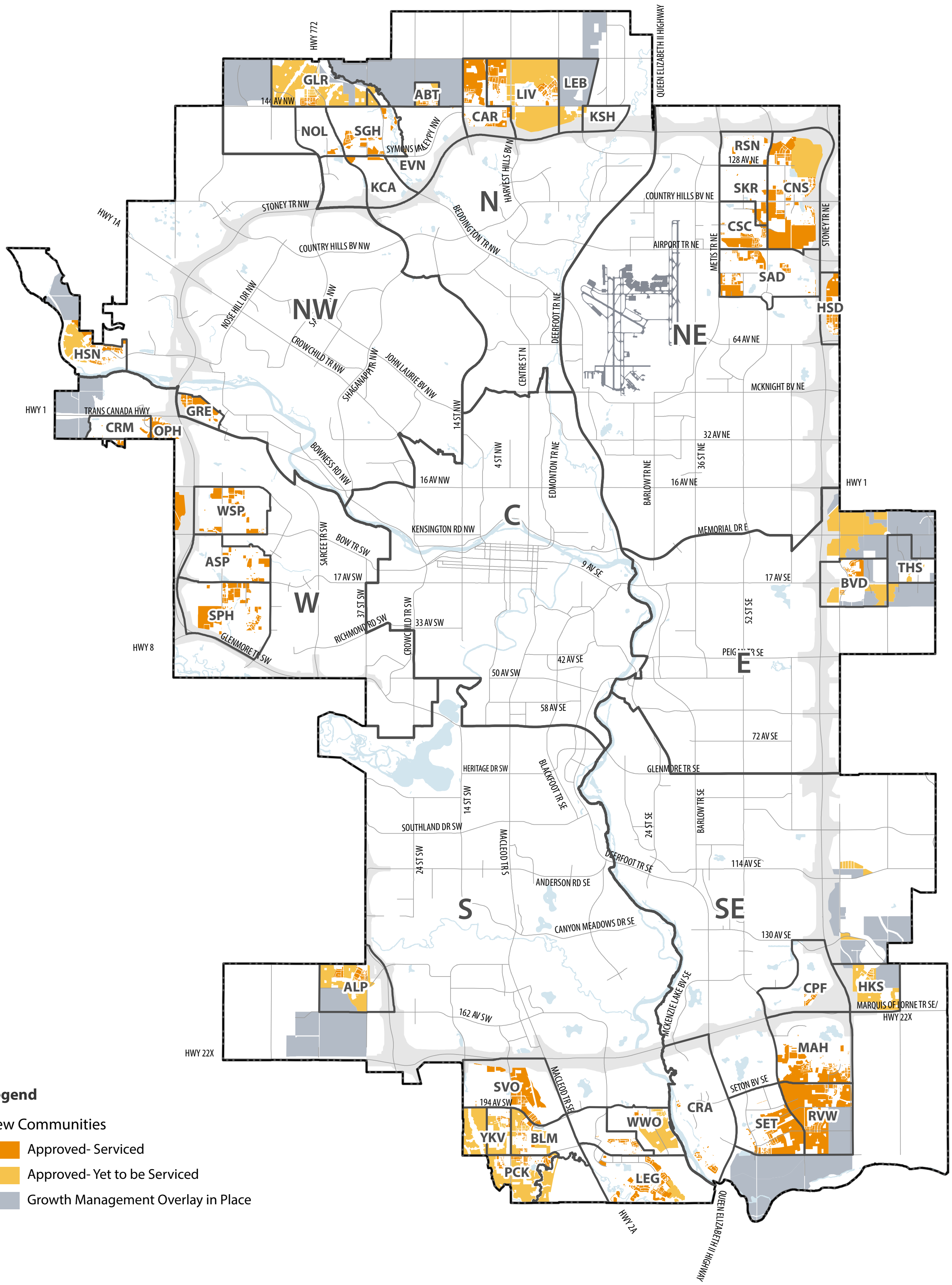
Sector	[B] Approved - Yet to be Serviced Land							[C] Approved - Serviced Land						
	Single/semi		Multi		Total		Population	Single/semi		Multi		Total		Population
	Units	Ha	Units	Ha	Units	Ha	Capacity	Units	Ha	Units	Ha	Units	Ha	Capacity
NORTH	8,527	403	8,714	180	17,241	583	47,310	5,090	188	7,203	57	12,293	246	32,642
NORTHEAST	637	72	425	48	1,062	121	3,036	7,175	295	6,630	128	13,805	423	38,265
EAST	3,227	158	3,145	133	6,372	291	17,569	410	13	711	11	1,120	25	2,915
SOUTHEAST	2,171	96	1,137	17	3,308	114	9,666	10,203	427	7,511	134	17,714	562	50,195
SOUTH	9,870	460	9,327	132	19,197	593	53,090	4,616	177	7,260	88	11,876	265	31,204
WEST	0	0	0	0	0	0	0	2,245	155	5,233	116	7,478	271	18,920
NORTHWEST	1,366	62	519	14	1,885	77	5,650	1,359	62	1,604	30	2,963	92	8,015
TOTAL	25,798	1,252	23,267	525	49,065	1,777	136,322	31,098	1,317	36,151	565	67,249	1,882	182,156

Table 5: Years of supply in new communities: planned, growth management overlay in place, approved – yet to be serviced and approved – serviced land as of April 2022

Sector	Total planned land supply [A+B+C]						[A] - Growth management overlay in place					
	Years of Supply						Years of Supply					
	Single/semi		Multi		Total		Single/semi		Multi		Total	
	High	Low	High	Low	High	Low	High	Low	High	Low	High	Low
NORTH	27	37	35	47	30	41	13	17	12	16	12	17
NORTHEAST	8	11	9	12	8	11	0	0	0	0	0	0
EAST	36	49	51	70	41	57	23	32	28	38	25	34
SOUTHEAST	21	29	19	26	20	28	8	11	7	10	8	11
SOUTH	20	28	32	43	25	34	6	8	6	8	6	8
WEST	18	24	48	66	30	41	6	8	6	8	6	8
NORTHWEST	24	33	51	70	31	42	5	7	10	13	6	9
TOTAL	20	28	25	35	22	31	8	10	7	10	7	10

Sector	[B] Approved - Yet to be Serviced Land						[C] Approved - Serviced Land					
	Years of Supply						Years of Supply					
	Single/semi		Multi		Total		Single/semi		Multi		Total	
	High	Low	High	Low	High	Low	High	Low	High	Low	High	Low
NORTH	9	12	13	17	10	14	5	7	10	14	7	10
NORTHEAST	1	1	1	1	1	1	7	10	8	11	8	11
EAST	11	15	19	26	14	19	1	2	4	6	2	3
SOUTHEAST	2	3	2	2	2	3	11	14	10	14	10	14
SOUTH	10	14	14	20	12	16	5	6	11	15	7	10
WEST	0	0	0	0	0	0	12	17	42	58	24	33
NORTHWEST	9	13	10	14	10	13	9	13	31	43	15	21
TOTAL	6	8	7	10	6	9	7	9	11	15	9	12

Map 2: Land supply in new communities as of April 2022



Legend

New Communities

- Approved- Serviced
- Approved- Yet to be Serviced
- Growth Management Overlay in Place

5.0 Sector profile

Part 5 provides a summary by planning sector, to supplement Part 3 (forecasts) and Part 4 (land supply). It also provides supply information for the 38 new communities, and areas outside of these communities but within Area Structure Plans as of April 2022.

North sector

Currently in the North sector there are nine new communities: Nolan Hill, Sage Hill, Evanston, Kincora, Livingston, Carrington, Lewisburg, Ambleton and Glacier Ridge. The nine communities are at various stages of build out. Of the nine communities, four communities (Nolan Hill, Sage Hill, Kincora and Evanston) are close to full build-out, three communities (Carrington, Ambleton and Livingston) are currently developing and the remaining two communities (Lewisburg and Glacier Ridge) are at early stages of development.

Historical absorption 2017-2021

New communities in the North sector accounted for an average of 24 per cent of total unit growth between 2017 and 2021, adding 7,661 total units (1,532 units per year average).

Forecasts for 2022-2026

Forecasts for 2022-2026 are estimating growth of 7,100 units (21 per cent) of total unit growth in the sector, averaging 1,420 units per year.

Figure 5: North sector single/semi capacity of new communities

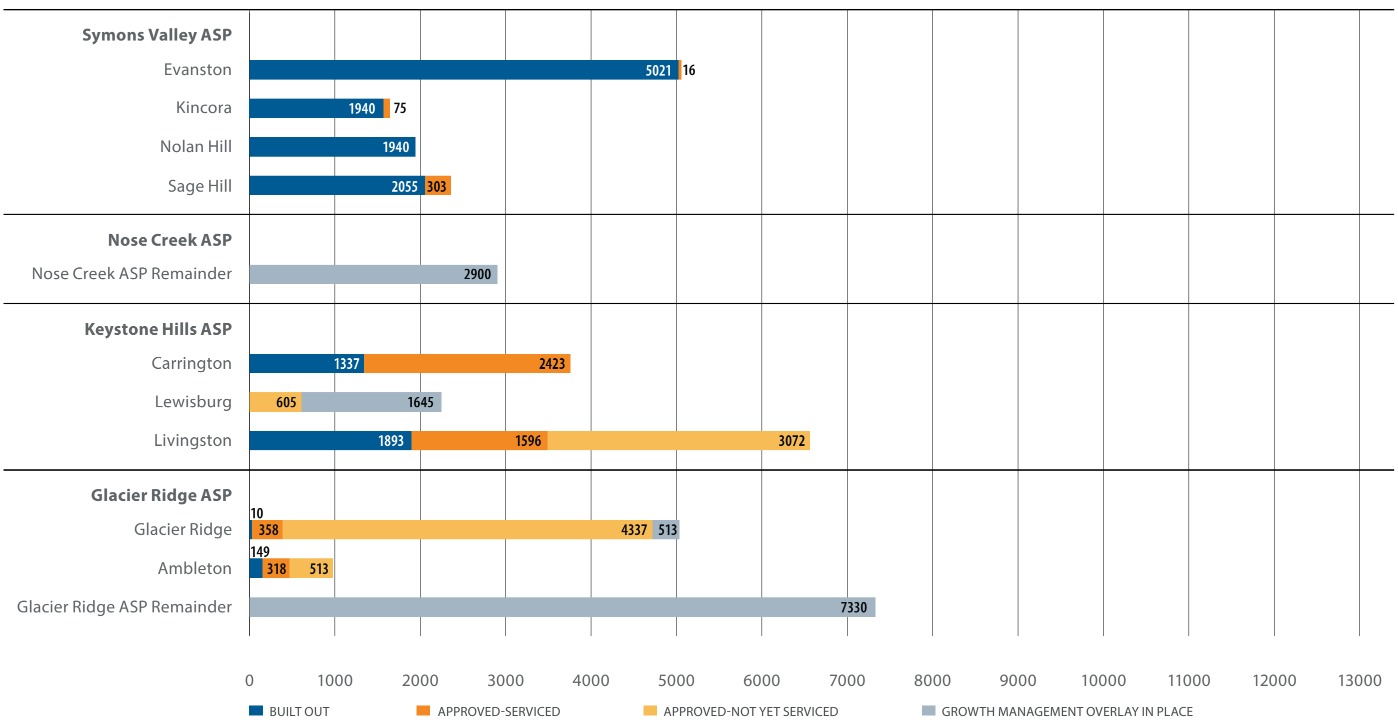


Table 6: North sector

Emergency services, transportation and major utility (water, sanitary, storm) infrastructure requirements for unserviced areas in an Area Structure Plan.

X = required for near-term development		Area Structure Plan		
Service Provider	Infrastructure	Keystone Hills	Glacier Ridge	Nose Creek
Water	North Calgary Water Servicing Strategy	X	X	X
Water	North Ridge Feedermain Ph 2	X	X	
Water	North Ridge Feedermain West Leg Ph 2	X	X	
Water	North Ridge Reservoir	X	X	
Water	Top Hill Feedermain		X	
Sanitary	East Keystone Sanitary Extension	X		
Sanitary	Nose Creek Sanitary Trunk			X
Sanitary	Nose Creek Sanitary Trunk Upgrade	X	X	X
Storm	144 Av NE Storm Trunk	X		
Transportation	160 Av NE & QEII Flyover	X		X
Transportation	160 Av NE & QEII Interchange	X		X
Transportation	Highway 566 & QEII Interchange			X
Transportation	West Nose Creek Flyover		X	
Emergency Response	Glacier Ridge Future Response Station		X	
Emergency Response	Nose Creek Future Response Station			X

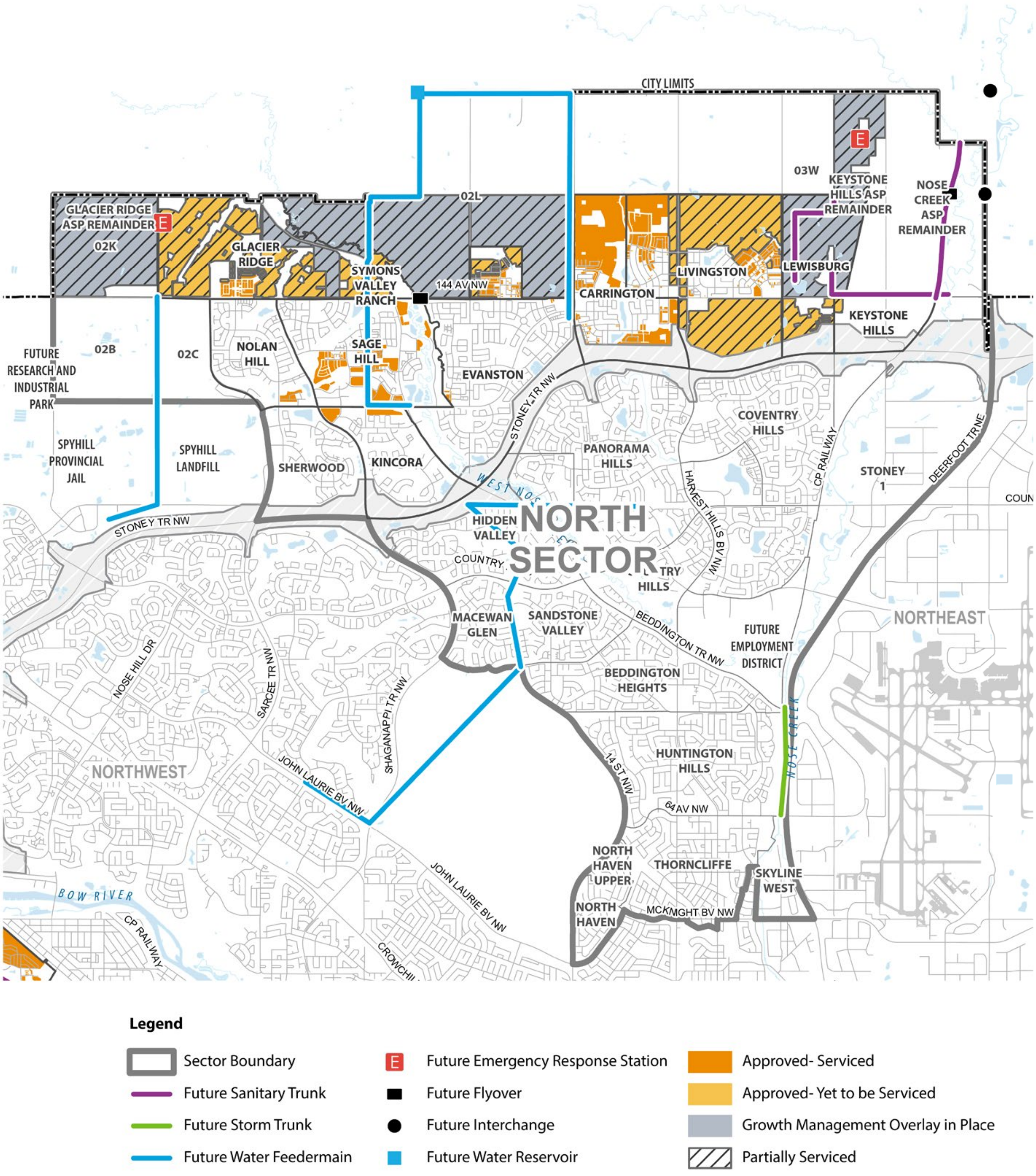
Table 7: Land supply by servicing status as of December 2022

Dwelling type	[A] Approved - Serviced land supply (as of December 2022)		[B] Approved - Yet to be serviced land supply				[C] Total approved supply [A+B]		[D] Growth management overlay in place						Total planned supply [C+D]	
			Partially serviced		Unserviced				Serviced		Partially serviced		Unserviced			
	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units
Single/semi	188	5,090	403	8,527	0	0	591	13,617	0	8	657	12,197	0	0	1,249	25,822
Multi	57	7,203	180	8,714	0	0	237	15,917	0	6	438	8,131	0	0	676	24,054
Total	246	12,293	583	17,241	0	0	829	29,534	1	14	1,095	20,328	0	0	1,925	49,876

Serviced (City Infrastructure): represents lands that have all capital infrastructure and services (emergency services, transportation, water, sanitary and storm) necessary to initiate development.
Partially Serviced: represents lands that have some capital infrastructure and service capacity in place but not all five.
Unserviced: represents lands that have no capital infrastructure and services in place (no emergency services, transportation,water, sanitary or storm)
The inventory excludes areas of land for which there is no Area Structure Plan in place

Source: City of Calgary

Map 3: North sector vacant residential land supply by servicing status as of December 2022



Northeast sector

Currently in the Northeast sector there are six new communities: Saddle Ridge, Cityscape, Skyview Ranch, Redstone, Cornerstone and Homestead. Of these six communities, Redstone and Skyview Ranch are expected to be completed during the forecasted period considering single/semi demand and available supply.

Historical absorption 2017-2021

New communities in the Northeast sector accounted for an average of 26 per cent of total unit growth between 2017 and 2021, adding 8,289 total units (1,658 units per year average).

Forecasts for 2022-2026

Forecasts for 2022-2026 are estimating growth of 7,715 units (23 per cent) of total unit growth in the sector, averaging 1,543 units per year.

Figure 6: Northeast sector single/semi capacity of new communities

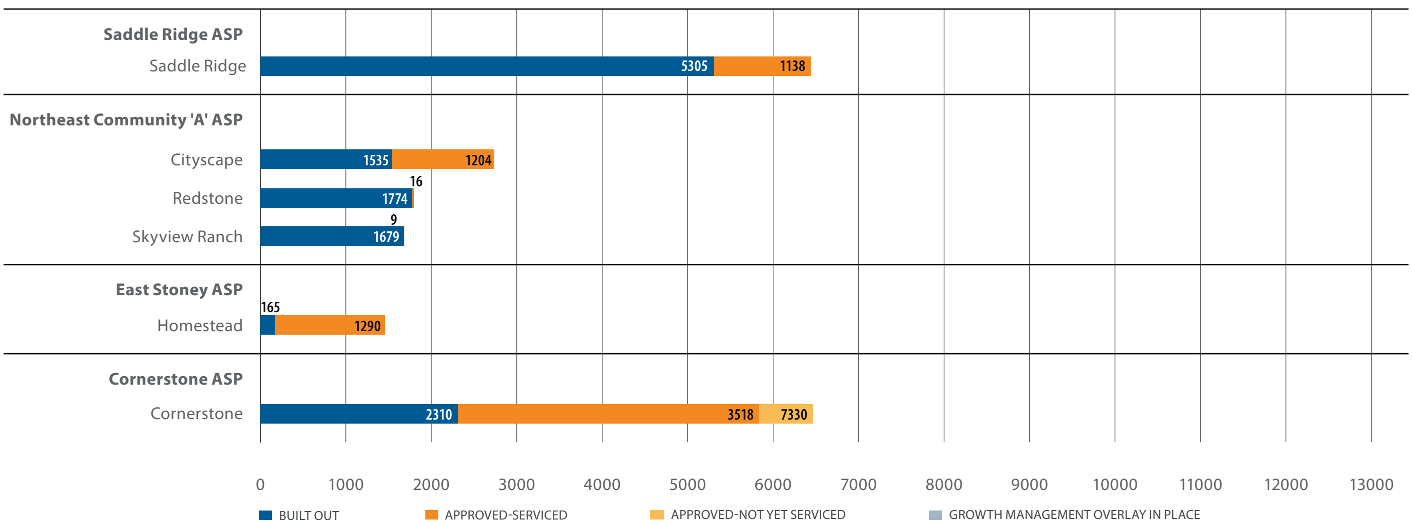


Table 8: Northeast sector

Emergency services, transportation and major utility (water, sanitary, storm) infrastructure requirements for unserviced areas in an Area Structure Plan.

X = required for near-term development		Area Structure Plan
Service Provider	Infrastructure	Cornerstone
Transportation	Airport Trail NE& 36 St NE Interchange	X
Transportation	Metis Trail NE & 64 Av NE Interchange	X
Transportation	60 St NE & Stoney Trail Interchange	X
Transportation	Airport Trail & Stoney Trail Interchange	X
Transportation	Airport Trail NE & 60 St NE Interchange	X
Transportation	Airport Trail NE & Metis Trail NE Interchange	X
Transportation	Airport Trail NE Ph 2	X
Transportation	Country Hills Blvd NE & Stoney Trail Interchange	X

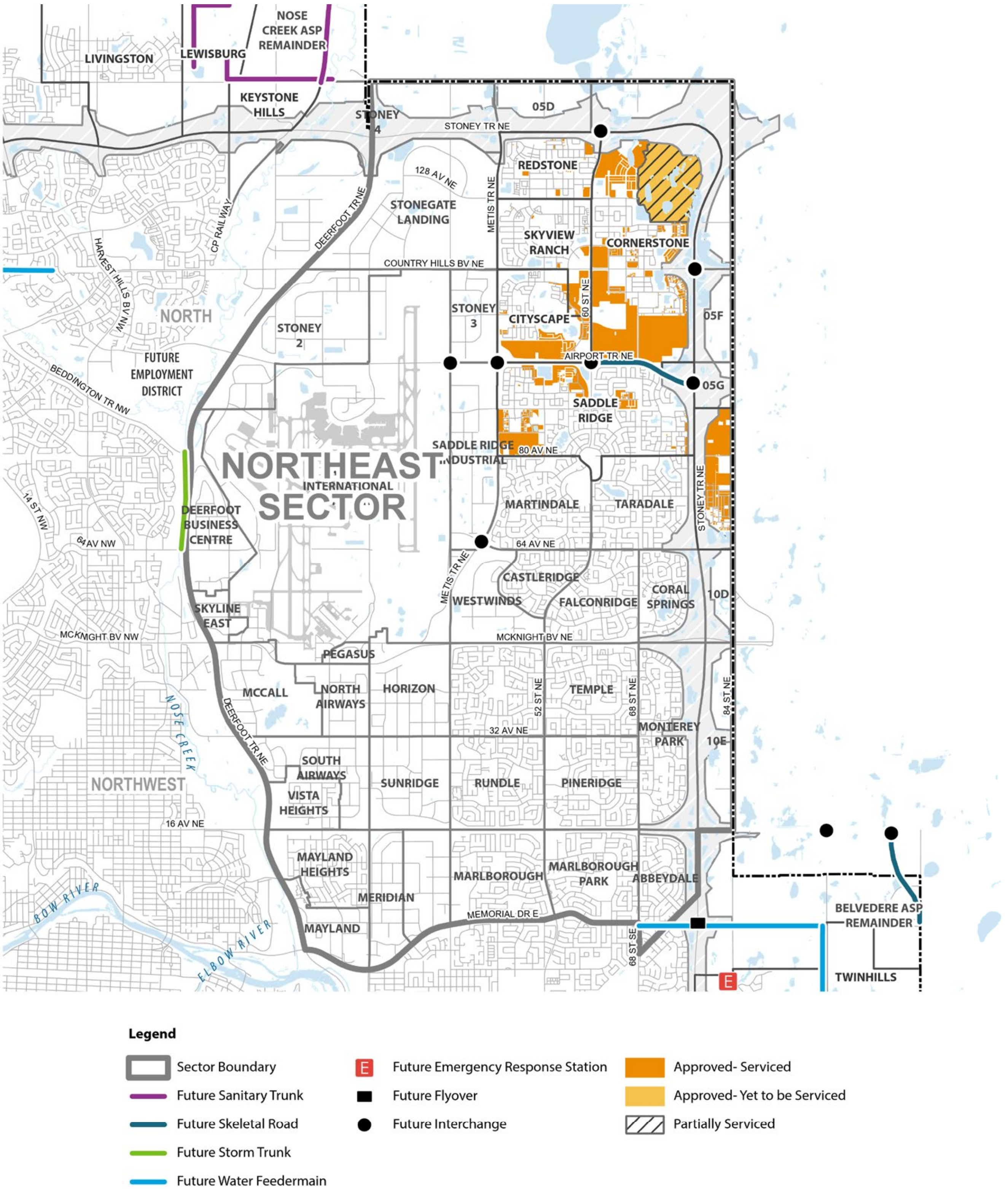
Table 9: Land supply by servicing status as of December 2022

Dwelling type	[A] Approved - Serviced land supply (as of December 2022)		[B] Approved - Yet to be serviced land supply				[C] Total approved supply [A+B]		[D] Growth management overlay in place						Total planned supply [C+D]	
			Partially serviced		Unserviced				Serviced		Partially serviced		Unserviced			
	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units
Single/semi	295	7,175	72	637	0	0	368	7,812	0	0	0	0	0	0	368	7,812
Multi	128	6,630	48	425	0	0	176	7,055	0	0	0	0	0	0	176	7,055
Total	423	13,805	121	1,062	0	0	543	14,867	0	0	0	0	0	0	543	14,867

Serviced (City Infrastructure): represents lands that have all capital infrastructure and services (emergency services, transportation, water, sanitary and storm) necessary to initiate development.
Partially Serviced: represents lands that have some capital infrastructure and service capacity in place but not all five.
Unserviced: represents lands that have no capital infrastructure and services in place (no emergency services, transportation,water, sanitary or storm)
The inventory excludes areas of land for which there is no Area Structure Plan in place

Source: City of Calgary

Map 4: Northeast sector vacant residential land supply by servicing status as of December 2022



East sector

Currently, the East sector has two new communities: Belvedere and Twinhills.

Historical absorption 2017-2021

It has been 25 years since this sector has experienced significant new community residential growth. When supply and community development existed in the early 1990s, this sector captured around 3-5 per cent of new community growth. In the last 2 years, the east sector amounted to 1 per cent of the absorption.

Forecasts for 2022-2026

Forecasts for 2022-2026 are estimating growth of 1,960 units (6 per cent) of total unit growth in the sector, averaging 392 units per year.

Figure 7: East sector single/semi capacity of new communities

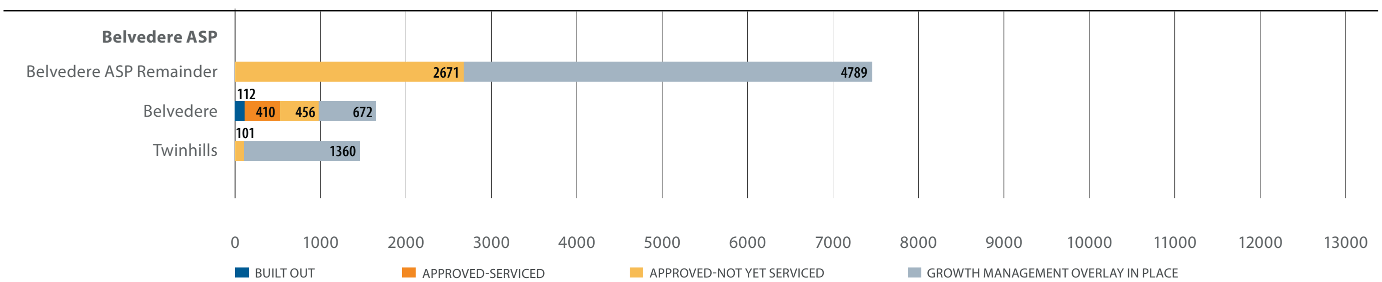


Table 10: East sector

Emergency Services, transportation and major utility (water, sanitary, storm) infrastructure requirements for unserviced areas in an Area Structure Plan.

X = required for near-term development		Area Structure Plan
Service Provider	Infrastructure	Belvedere
Water	Belvedere Feedermain	X
Sanitary	Belvedere East Basin Sanitary Trunk	X
Storm	Forest Lawn Creek Improvements	X
Storm	East Belvedere To CSMI Storm Trunk	X
Transportation	116 St NE Skeletal Road	X
Transportation	Peigan Trail Skeletal Road	X
Transportation	Transcanada & 116 St NE Interchange	X
Transportation	Transcanada & 100 St NE Interchange	X
Transportation	Stoney Trail & Memorial Dr E Flyover	X
Emergency Response	Emergency Response Station 45	X

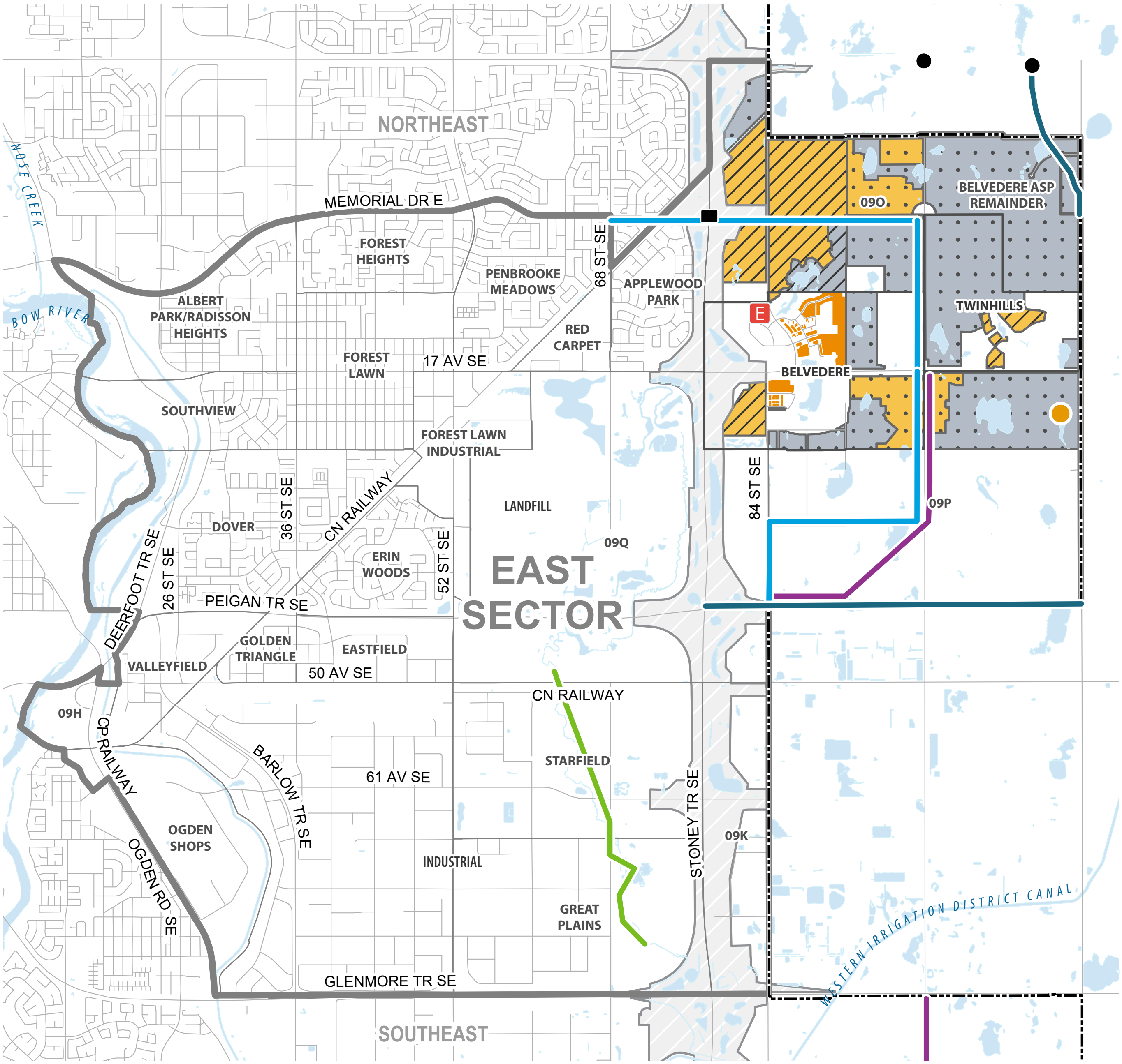
Table 11: Land supply by servicing status as of December 2022

Dwelling type	[A] Approved - Serviced land supply (as of December 2022)		[B] Approved - Yet to be serviced land supply				[C] Total approved supply [A+B]		[D] Growth management overlay in place						Total planned supply [C+D]	
			Partially serviced		Unserviced				Serviced		Partially serviced		Unserviced			
	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units
Single/semi	13	410	99	2,007	59	1,220	171	3,637	0	0	16	312	338	6,509	526	10,458
Multi	11	711	94	2,332	39	814	144	3,856	0	0	11	246	225	4,340	381	8,441
Total	25	1,120	193	4,339	98	2,034	315	7,493	0	0	27	558	564	10,849	906	18,899

Serviced (City Infrastructure): represents lands that have all capital infrastructure and services (emergency services, transportation, water, sanitary and storm) necessary to initiate development.
Partially Serviced: represents lands that have some capital infrastructure and service capacity in place but not all five.
Unserviced: represents lands that have no capital infrastructure and services in place (no emergency services, transportation,water, sanitary or storm)
The inventory excludes areas of land for which there is no Area Structure Plan in place

Source: City of Calgary

Map 5: East sector vacant residential land supply by servicing status as of December 2022



Legend

- Sector Boundary
- Future Sanitary Trunk
- Future Skeletal Road
- Future Storm Trunk
- Future Water Feedermain
- Future Emergency Response Station
- Future Flyover
- Future Interchange
- Future Sanitary Lift Station
- Future Water Pump Station
- Future Water Reservoir
- Future Storm Trunk, Location To Be Determined
- Approved- Serviced
- Approved- Yet to be Serviced
- Growth Management Overlay in Place
- Partially Serviced
- Unserviced

Southeast sector

Currently in the Southeast sector, there are six new communities: Copperfield, Cranston, Mahogany, Hotchkiss, Rangeview and Seton. Hotchkiss and Rangeview are at the early stages of development compared to Copperfield and Cranston which are expected to be completed during the forecasted period considering single/semi demand and available supply.

Historical absorption 2017-2021

New communities in the Southeast sector accounted for an average of 23 per cent of total unit growth between 2017 and 2021, adding 7,436 total units (1,487 units per year average).

Forecasts for 2022-2026

Forecasts for 2022-2026 are estimating growth of 7,290 units (22 per cent) of total unit growth in the sector, averaging 1,458 units per year.

Figure 8: Southeast sector single/semi capacity of new communities

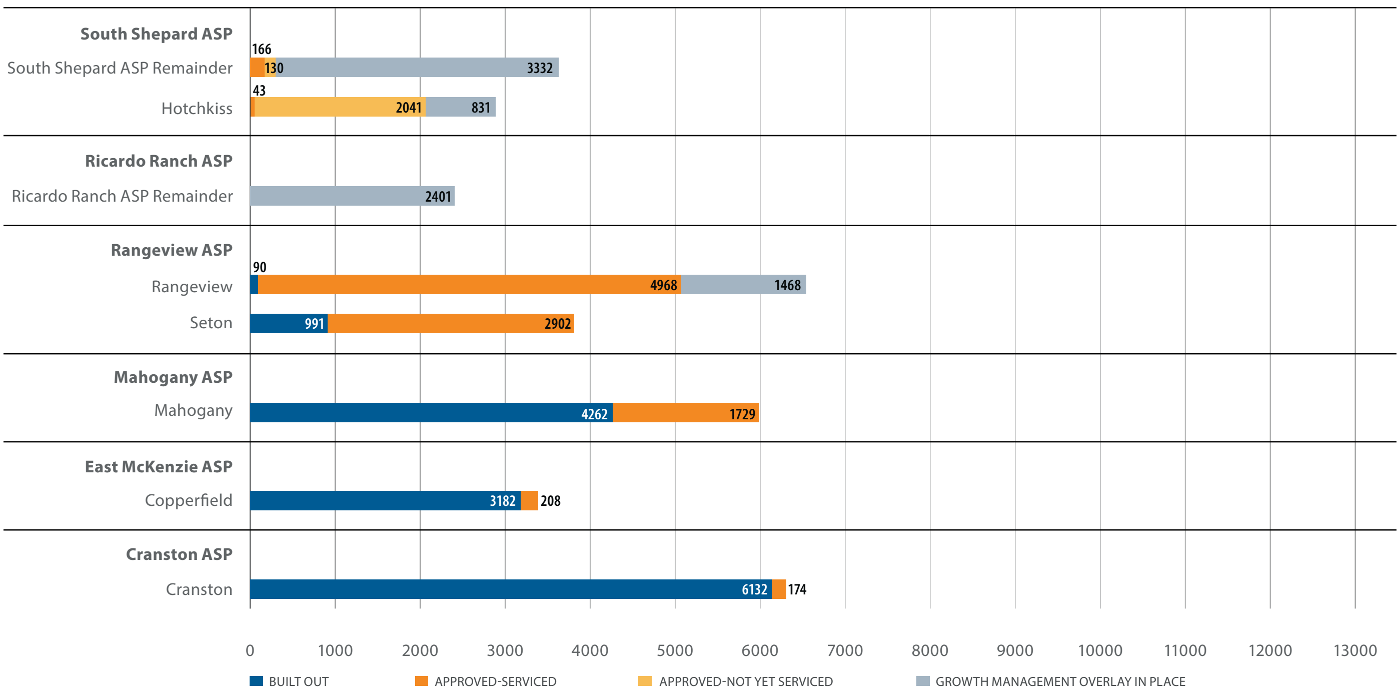


Table 12: Southeast sector

Emergency Services, transportation and major utility (water, sanitary, storm) infrastructure requirements for unserviced areas in an Area Structure Plan.

X = required for near-term development		Area Structure Plan		
Service Provider	Infrastructure	South Shepard	Rangeview	Ricardo Ranch
Water	Ogden Feedermain		X	X
Sanitary	Cranston Sanitary Trunk		X	X
Sanitary	Rangeview Sanitary Trunk Ph 2	X	X	X
Sanitary	Rangeview Trunk Lateral		X	X
Sanitary	Southeast Regional Sanitary System	X		
Sanitary	Shepard Forcemain	X		
Sanitary	52 St Trunk System Upgrade	X		
Sanitary	Shepard Industrial Lift Station	X		
Transportation	106 Av SE & Stoney Trail Flyover	X		
Transportation	130 Av SE & Stoney Trail Interchange	X		
Emergency Response	Rangeview Future Response Station		X	X
Emergency Response	South Shepard Future Response Station	X		

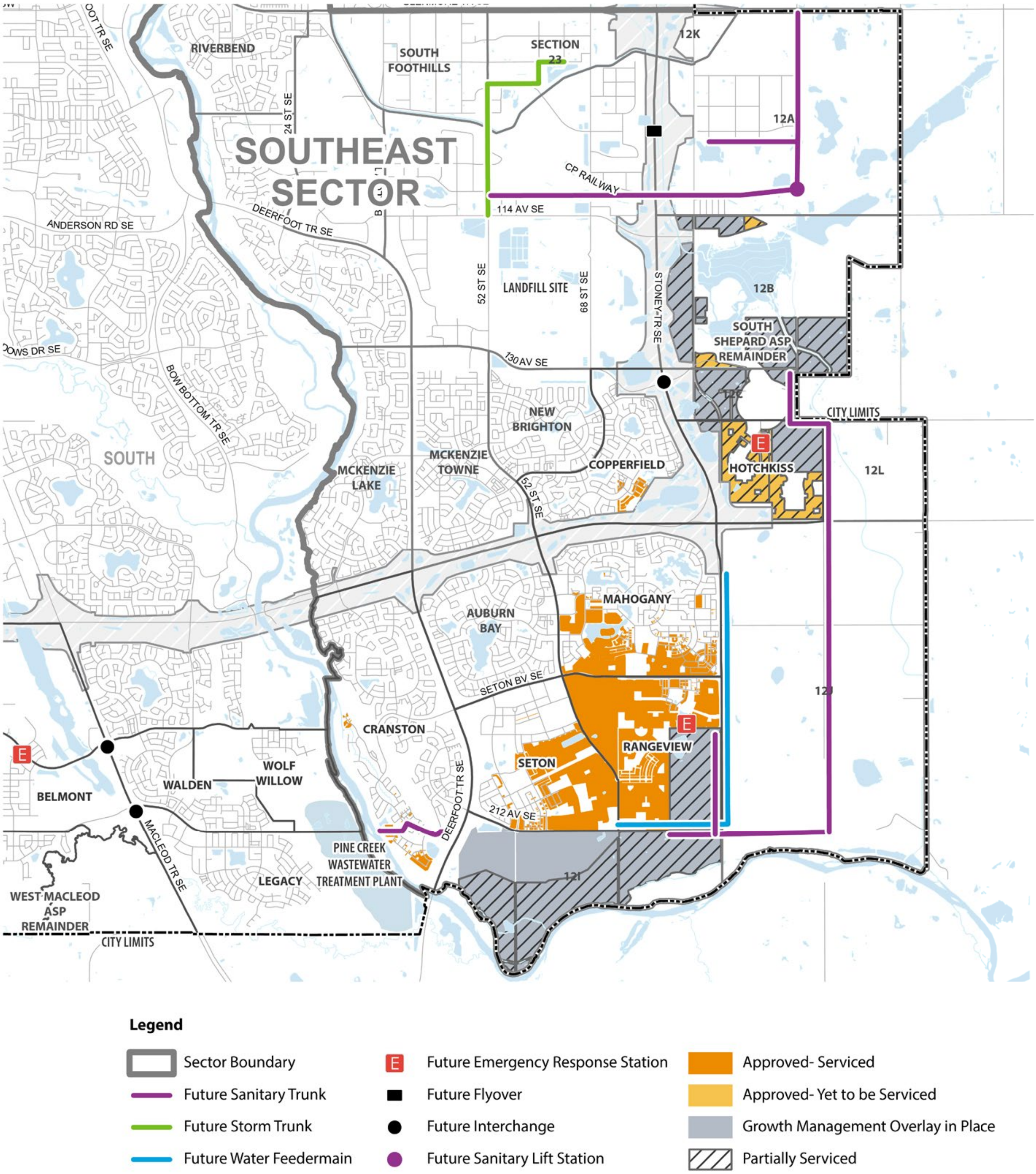
Table 13: Land supply by servicing status as of December 2022

Dwelling type	[A] Approved - Serviced land supply (as of December 2022)		[B] Approved - Yet to be serviced land supply				[C] Total approved supply [A+B]		[D] Growth management overlay in place						Total planned supply [C+D]	
			Partially serviced		Unserviced				Serviced		Partially serviced		Unserviced			
	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units
Single/semi	427	10,203	96	2,171	0	0	523	12,375	102	1,221	482	6,811	0	0	1,107	20,407
Multi	134	7,511	17	1,137	0	0	152	8,647	68	814	321	4,541	0	0	541	14,002
Total	562	17,714	114	3,308	0	0	675	21,022	170	2,034	804	11,352	0	0	1,648	34,409

Serviced (City Infrastructure): represents lands that have all capital infrastructure and services (emergency services, transportation, water, sanitary and storm) necessary to initiate development.
Partially Serviced: represents lands that have some capital infrastructure and service capacity in place but not all five.
Unserviced: represents lands that have no capital infrastructure and services in place (no emergency services, transportation,water, sanitary or storm)
The inventory excludes areas of land for which there is no Area Structure Plan in place

Source: City of Calgary

Map 6: Southeast sector vacant residential land supply by servicing status as of December 2022



South sector

Currently in the South sector, there are eight new communities: Legacy, Walden, Silverado, Belmont, Yorkville, Pine Creek, Alpine Park and Wolf Willow. Walden is expected to be completed during the forecasted period considering single/semi demand and available supply.

Historical absorption 2017-2021

New communities in the South sector accounted for an average of 17 per cent of total unit growth between 2017 and 2021, adding 5,339 total units (1,068 units per year average).

Forecasts for 2022-2026

Forecasts for 2022-2026 are estimating growth of 7,070 units (21 per cent) of total unit growth in the sector, averaging 1,414 units per year.

Figure 9: South sector single/semi capacity of new communities

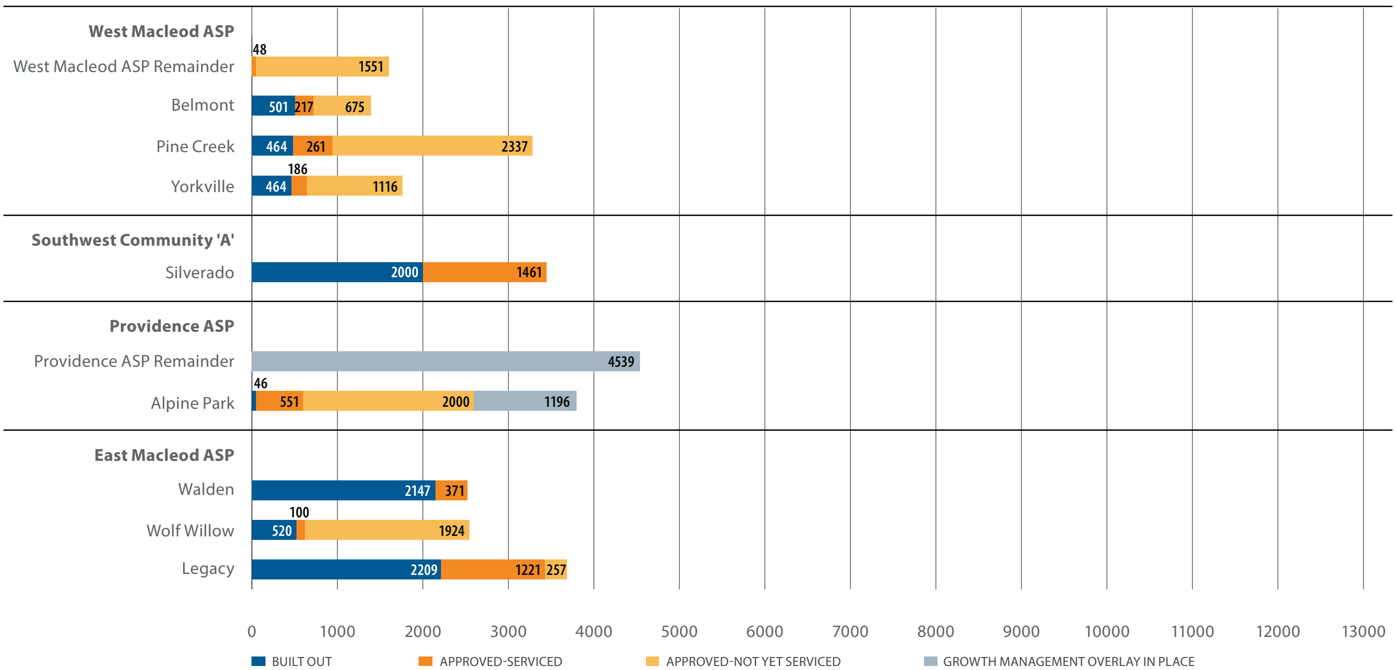


Table 14: South sector

Emergency services, transportation and major utility (water, sanitary, storm) infrastructure requirements for unserviced areas in an Area Structure Plan.

X = required for near-term development		**Area Structure Plan**		
Service Provider	Infrastructure	East Macleod	West Macleod	Providence
Water	Providence Feedermain			
Water	Starlight Reservoir			X
Water	Westview Reservoir			
Water	Westview Pump Station			X
Water	Lower Sarcee Feedermain		X	X
Water	Yorkville 210 Av SW Pump Station		X	X
Sanitary	West Pine Creek Sanitary Trunk			X
Storm	Providence Storm Trunk & Outfall			X
Transportation	194 Av SE & Macleod Tr Interchange	X	X	
Transportation	210 Av SE & Macleod Tr Interchange	X	X	
Emergency Response	Providence Future Response Station			X
Emergency Response	Belmont Future Response Station		X	

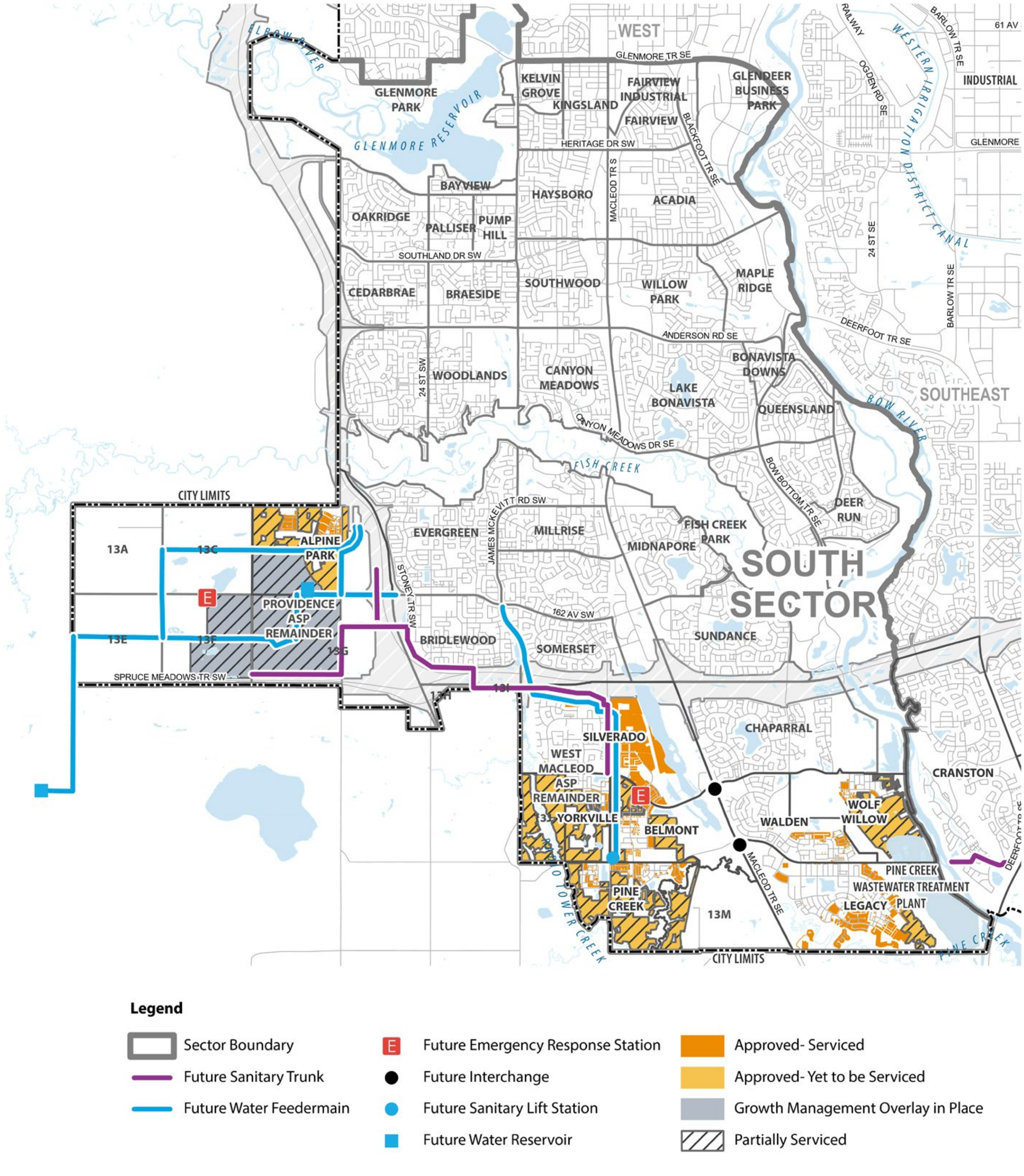
Table 15: Land supply by servicing status as of December 2022

Dwelling type	**[A] Approved - Serviced land supply (as of December 2022)**		**[B] Approved - Yet to be serviced land supply**				**[C] Total approved supply [A+B]**		**[D] Growth management overlay in place**						**Total planned supply [C+D]**	
			Partially serviced		Unserviced				Serviced		Partially serviced		Unserviced			
	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units
Single/semi	177	4,616	460	9,870	0	0	637	14,486	0	0	280	5,734	0	0	917	20,220
Multi	88	7,260	132	9,327	0	0	221	16,587	0	0	187	3,823	0	0	407	20,410
Total	265	11,876	593	19,197	0	0	858	31,072	0	0	467	9,557	0	0	1,324	40,630

Serviced (City Infrastructure): represents lands that have all capital infrastructure and services (emergency services, transportation, water, sanitary and storm) necessary to initiate development.
Partially Serviced: represents lands that have some capital infrastructure and service capacity in place but not all five.
Unserviced: represents lands that have no capital infrastructure and services in place (no emergency services, transportation,water, sanitary or storm)
The inventory excludes areas of land for which there is no Area Structure Plan in place

Source: City of Calgary

Map 7: South sector vacant residential land supply by servicing status as of December 2022



West sector

Currently in the West sector there are five new communities: Springbank Hill, Aspen Woods, Crestmont and Osprey Hill. Of the five new communities, Crestmont is expected to be completed during the forecasted period considering single/semi demand and available supply.

Historical absorption 2017-2021

New communities in the West sector accounted for an average of 8 per cent of total unit growth between 2017 and 2021, adding 2,554 total units (511 units per year average).

Forecasts for 2022-2026

Forecasts for 2022-2026 are estimating growth of 1,330 units (4 per cent) of total unit growth in the sector, averaging 266 units per year.

Figure 10: West sector single/semi capacity of new communities

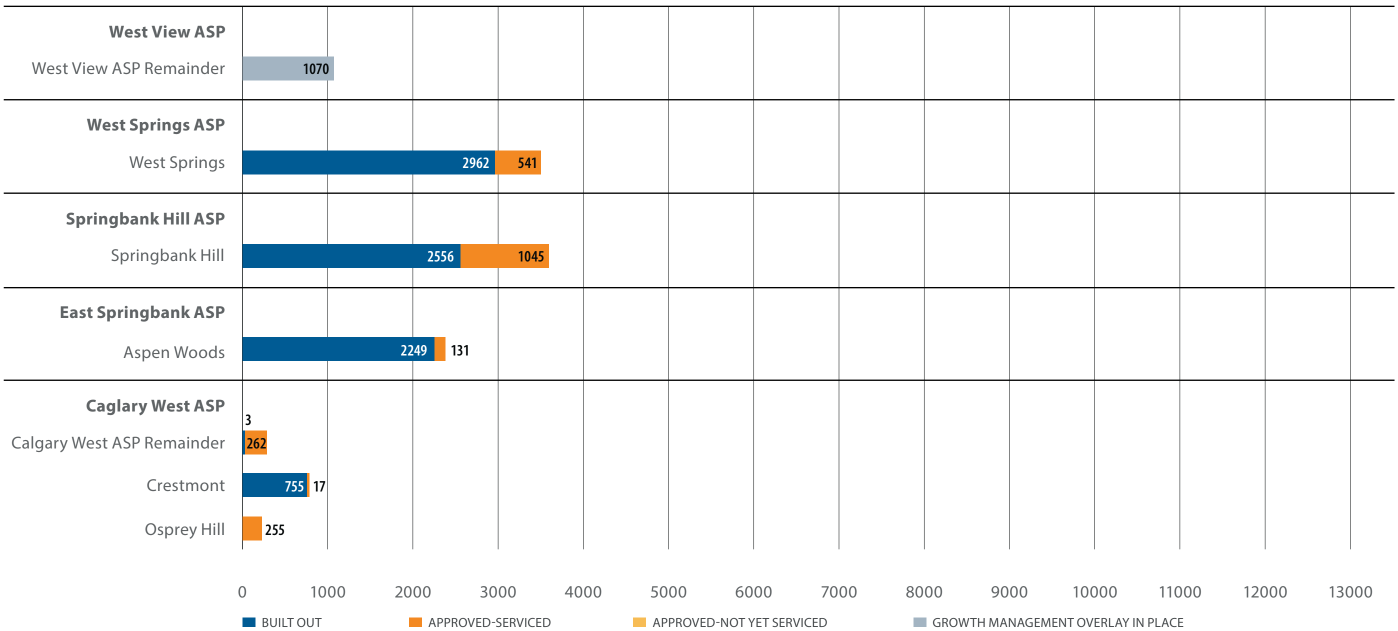


Table 16: West sector

Emergency services, transportation and major utility (water, sanitary, storm) infrastructure requirements for unserviced areas in an Area Structure Plan.

X = required for near-term development		Area Structure Plan
Service Provider	Infrastructure	West View
Water	Valley Ridge Pump Station (Upgrades)	X
Water	West View Crestmont Feedermain	X
Sanitary	Trans Canada Sanitary Trunk	X
Storm	West View Trunk & Outfall	X
Transportation	133 St NW &Trans-Canada Interchange	X
Transportation	Highway 8 & Stoney Trail Interchange	X
Transportation	Old Banff Coach Rd NW & Stoney Trail Interchange	X
Transportation	17 Av SW & Stoney Trail Interchange	X
Transportation	Bow Trail SW & Stoney Trail Interchange	X
Transportation	Stoney Trail (West Calgary Ring Road)	X
Transportation	Trans-Canada & Stoney Trail Interchange Upgrade	X
Transportation	Trans-Canada Highway (West Calgary Ring Road)	X
Transportation	Valley Ridge Blvd & Trans-Canada Interchange	X
Emergency Response	West View Future Response Station	X

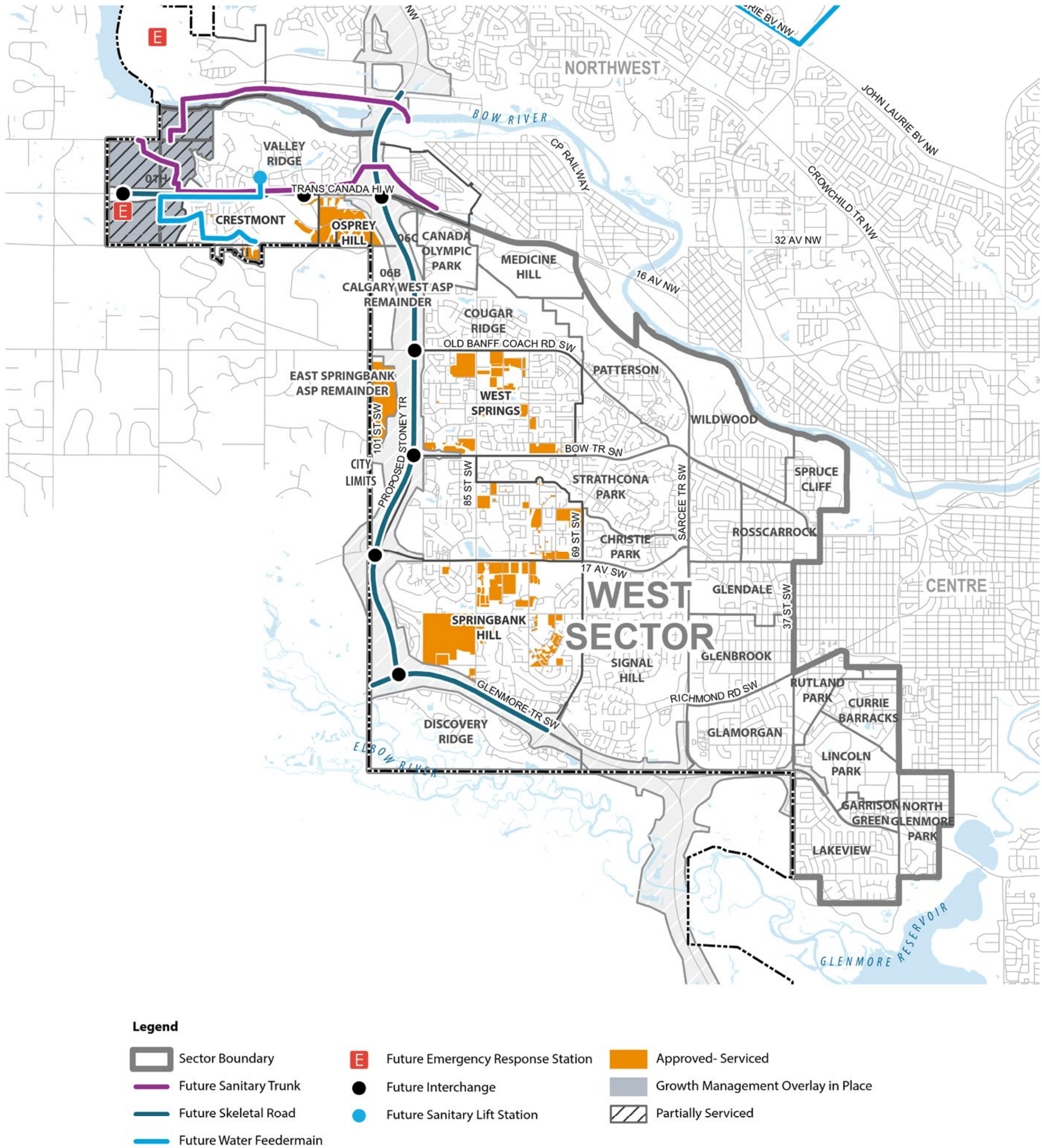
Table 17: Land supply by servicing status as of December 2022

Dwelling type	[A] Approved - Serviced land supply (as of December 2022)		[B] Approved - Yet to be serviced land supply				[C] Total approved supply [A+B]		[D] Growth management overlay in place						Total planned supply [C+D]	
			Partially serviced		Unserviced				Serviced		Partially serviced		Unserviced			
	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units
Single/semi	155	2,245	0	0	0	0	155	2,245	0	0	130	1,070	0	0	285	3,315
Multi	116	5,233	0	0	0	0	116	5,233	0	0	87	713	0	0	202	5,946
Total	271	7,478	0	0	0	0	271	7,478	0	0	217	1,784	0	0	488	9,261

Serviced (City Infrastructure): represents lands that have all capital infrastructure and services (emergency services, transportation, water, sanitary and storm) necessary to initiate development.
Partially Serviced: represents lands that have some capital infrastructure and service capacity in place but not all five.
Unserviced: represents lands that have no capital infrastructure and services in place (no emergency services, transportation,water, sanitary or storm)
The inventory excludes areas of land for which there is no Area Structure Plan in place

Source: City of Calgary

Map 8: West sector vacant residential land supply by servicing status as of December 2022



Northwest sector

The Northwest sector has two new communities, Haskayne and Greenwood/Greenbriar. The community of Greenwood/Greenbriar is in its early stages of development with multi-residential development currently completed.

Historical absorption 2017-2021

The last community, Rocky Ridge, was built-out in 2009. The only undeveloped lands for future development are located in the community of Haskayne. The Northwest sector accounted for an average 1 per cent of total unit growth between 2017 and 2021, adding 445 total units (89 units per year average).

Forecasts for 2022-2026

Forecasts for 2022-2026 are estimating growth of 840 units (3 per cent) of total unit growth in the sector, averaging 168 units per year.

Figure 11: Northwest sector single/semi capacity of new communities

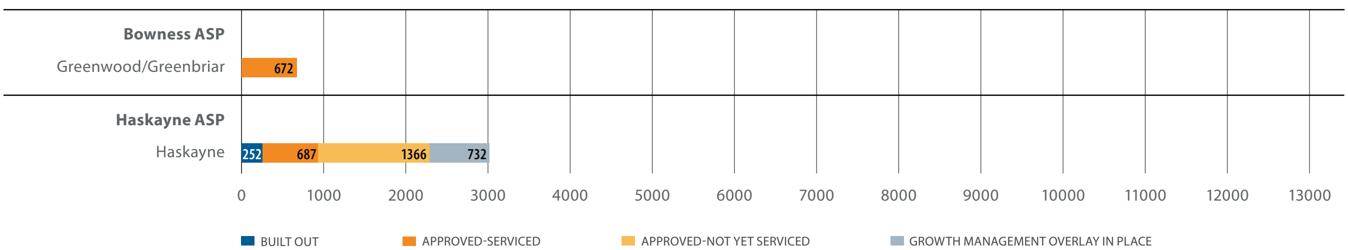


Table 18: Northwest sector

Emergency services, transportation and major utility (water, sanitary, storm) infrastructure requirements for unserviced areas in an Area Structure Plan.

X = required for near-term development		Area Structure Plan
Service Provider	Infrastructure	Haskayne
Emergency Response	Haskayne Future Response Station	X

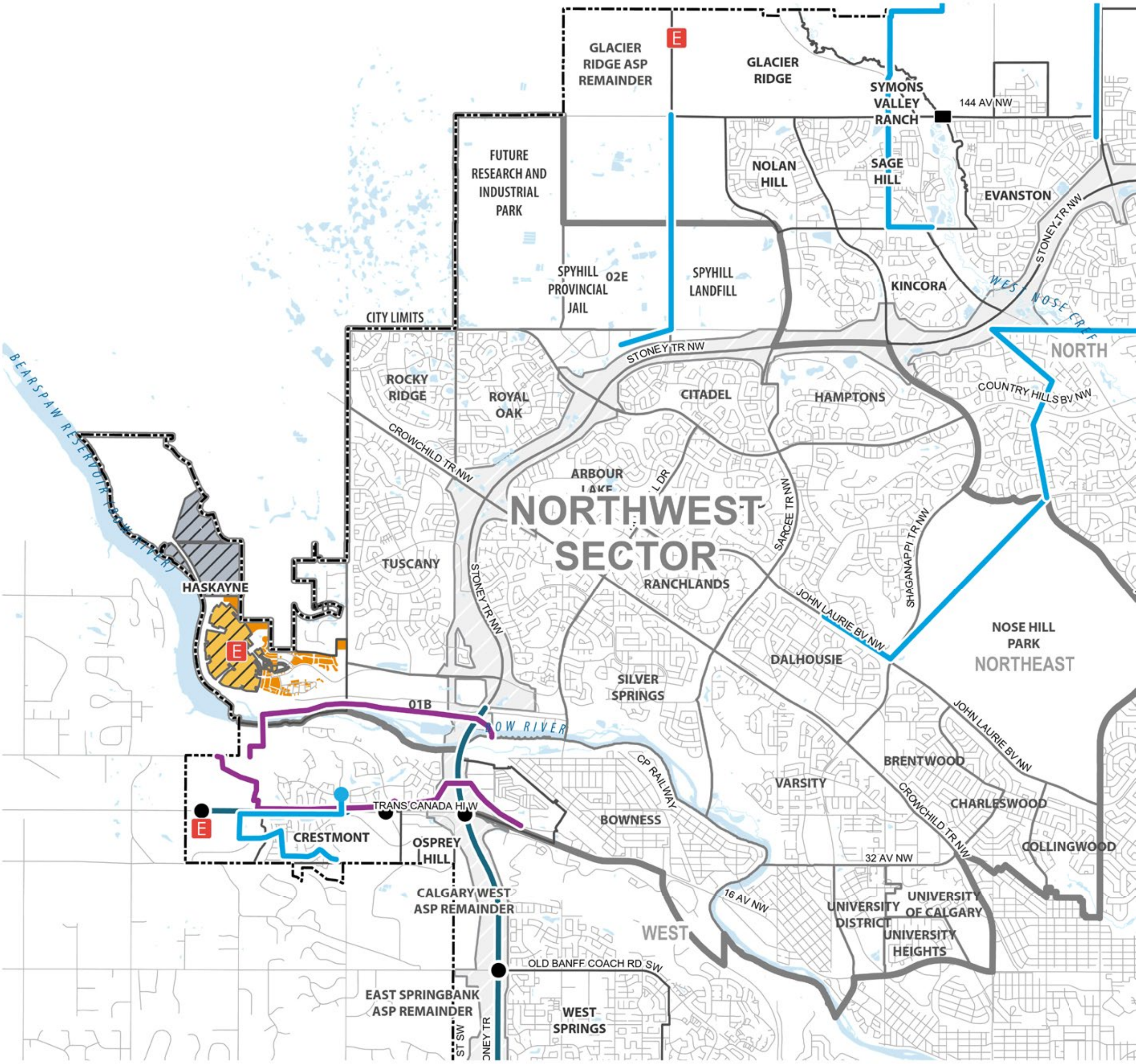
Table 19: Land supply by servicing status as of December 2022

Dwelling type	[A] Approved - Serviced land supply (as of December 2022)		[B] Approved - Yet to be serviced land supply				[C] Total approved supply [A+B]		[D] Growth management overlay in place						Total planned supply [C+D]	
			Partially serviced		Unserviced				Serviced		Partially serviced		Unserviced			
	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units	Ha	Units
Single/semi	62	1,359	62	1,366	0	0	124	2,725	0	0	60	732	0	0	184	3,457
Multi	30	1,604	14	519	0	0	44	2,123	0	0	40	488	0	0	84	2,611
Total	92	2,963	77	1,885	0	0	169	4,849	0	0	100	1,219	0	0	268	6,068

Serviced (City Infrastructure): represents lands that have all capital infrastructure and services (emergency services, transportation, water, sanitary and storm) necessary to initiate development.
Partially Serviced: represents lands that have some capital infrastructure and service capacity in place but not all five.
Unserviced: represents lands that have no capital infrastructure and services in place (no emergency services, transportation,water, sanitary or storm).
The inventory excludes areas of land for which there is no Area Structure Plan in place.

Source: City of Calgary

Map 9: Northwest sector vacant residential land supply by servicing status as of December 2022.



Legend

- Sector Boundary
- Future Sanitary Trunk
- Future Skeletal Road
- Future Water Feedermain
- Future Emergency Response Station
- Future Flyover
- Future Interchange
- Future Sanitary Lift Station
- Approved- Serviced
- Approved- Yet to be Serviced
- Growth Management Overlay in Place
- Partially Serviced

6.0 Conclusion

In terms of growth, The City's long term goal is to strike a balance between developed and developing areas, as set out in the Municipal Development Plan. With regards to developing areas, two major targets are identified within the plan. The first target is to maintain a 3 to 5 year supply of serviced land (land with capital infrastructure in place) and the second target is to maintain up to a 15 year supply of planned land (area structure plans in place). The City recognizes that the numbers stated are based on an overall city wide capacity as articulated in the Municipal Development Plan and it should be noted that capacity varies at a sectoral level and at different stages of development.

The current level of approved - serviced land provides capacity to address the city wide new community market demand for the next 9 to 12 years. An additional 6 to 9 years of approved - yet to be serviced capacity is proposed to come online as committed capital infrastructure gets built. Furthermore, while not reflected in this report, Council decisions associated with the 2022 new community business case process will also provide additional land supply to sectors where business cases have been approved.

As of April 2022, Calgary's developing areas have 22 to 31 years of planned land supply. This reflects the total years of supply remaining on lands with a growth management overlay, approved - yet to be serviced and approved - serviced supply.

The City strives to maintain a healthy supply of land ensuring there are no supply constraints in capacity for growth in the long term.

November 25, 2022

City & Regional Planning, Planning & Development
City of Calgary
800 Macleod Trail South
Calgary, AB T2P 3P4

Attention: Rayner D'Souza, Planner, Growth Analytics, City & Regional Planning, Planning & Development

RE: Suburban Residential Growth Report 2022-2026

BILD Calgary Region (BILD) sincerely appreciates the efforts of all City of Calgary Administration and staff, for their contributions to the Suburban Residential Growth Report 2022–2026 and would also like to acknowledge and thank our member volunteers who devote their valuable time and expertise to this annual review.

We value the positive collaboration with Rayner D'Souza and the Growth and Change Strategy team and appreciate their hard work and dedication to not only this year's report, but also to the exploration and pursuit of a more modern, interactive format for future reports.

As the estimates for housing and population for Calgary were produced in Spring 2022, BILD members and staff are fully committed to supporting the City's move to an interactive format for future reports with more current and accessible data, which will allay some of the challenges with the current reporting process. Although land supply varies on a sectoral level, it is necessary that an adequate supply of fully serviced land is ensured and maintained in all parts of the City to support housing choice and affordability.

Again, we thank the City of Calgary Administration and staff, and look forward to continuing this partnership into 2023.

Yours truly,
BILD CALGARY REGION

Brian Hahn, CEO

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