



Developing Suburban Communities Supply Monitoring:

Monthly reporting will be adjusted (trued up) with each SRG annual inventory report. Takes September inventory adds in new supply and subtracts out absorption

September, 2020 Estimated Serviced Inventory Subdivided Lots and Unsubdivided with Approved Land Use / Outline Plan
(includes vacant registered lots and approved Tentative Plans of Subdivision)

Sector & Community

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
NORTH		Subdivided Land & Units (A)				Unsubdivided Land & Units (B)			
		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Community		6	0	837	837	0	0	0	0
Nolan Hill		6	0	837	837	0	0	0	0
Sage Hill		36	182	2,735	2,917	23	0	2,751	2,751
Kincora		6	0	1,775	1,775	0	0	0	0
Evanston		6	51	326	377	1	19	0	19
Carrington		7	211	183	394	0	0	0	0
Livingston		10	285	523	808	0	0	0	0
Total		71	729	6,379	7,108	24	19	2,751	2,770

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
NORTHEAST		Subdivided Land & Units (A)				Unsubdivided Land & Units (B)			
		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Community		14	444	93	537	32	157	1,505	1,662
Cityscape		47	577	1,370	1,947	53	672	151	823
Saddle Ridge		10	0	2,055	2,055	13	0	2,203	2,203
Skyview Ranch		13	245	384	629	3	0	518	518
Redstone		9	148	944	1,092	0	0	0	0
Cornerstone		93	1,414	4,846	6,260	100	829	4,377	5,206
Total		194	2,243	9,223	11,466	21%			

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
EAST		Subdivided Land & Units (A)				Unsubdivided Land & Units (B)			
		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Community		0	0	0	0	0	0	0	0
Belvedere		0	0	0	0	0	0	0	0
Total		0	0	0	0	0	0	0	0

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
SOUTHEAST		Subdivided Land & Units (A)				Unsubdivided Land & Units (B)			
		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Community		7	117	12	129	8	109	0	109
Copperfield		12	157	450	607	22	252	200	452
Cranston		33	691	1,654	2,345	150	1,459	2,187	3,646
Mahogany		13	4	766	770	0	0	0	0
Seton		65	969	2,882	3,851	180	1,820	2,387	4,207
Total		245	2,789	5,269	8,058	26%			

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
SOUTH		Subdivided Land & Units (A)				Unsubdivided Land & Units (B)			
		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Community		15	383	456	839	11	172	104	276
Walden		35	585	244	829	105	1,375	1,090	2,465
Legacy		1	31	0	31	40	400	834	1,234
Silverado		11	7	210	217	33	99	503	602
Belmont		13	90	155	245	24	300	200	500
Pine Creek		0	0	0	0	24	300	200	500
Wolf Willow		0	0	0	0	23	287	200	487
Yorkville		75	1,096	1,065	2,161	260	2,934	3,131	6,065
Total		336	4,030	4,196	8,226	38%			

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
WEST		Subdivided Land & Units (A)				Unsubdivided Land & Units (B)			
		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Community		9	106	53	159	9	167	0	167
Aspen Woods		8	159	0	159	0	0	0	0
Crestmont		23	140	1,442	1,582	22	24	1,747	1,771
West Springs		9	162	0	162	2	10	0	10
Springbank Hill		50	567	1,495	2,062	33	201	1,747	1,948
Total		83	768	3,242	4,010	7%			

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
NORTHWEST		Subdivided Land & Units (A)				Unsubdivided Land & Units (B)			
		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Community		0	0	0	0	0	0	0	0
Haskayne		0	0	0	0	0	0	0	0
Total		0	0	0	0	0	0	0	0

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
CITYTOTAL		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
		354	4,775	16,668	21,443	598	5,803	14,393	20,196
		952	10,578	31,061	41,638	100%			

		2020 Estimated September Inventory							
		Units available for Housing				Lands available to be Subdivided			
CITYTOTAL		Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total
		Total Supply (A+B)				Share of			
		Ha	SF/Semi/Row	Multi	Total	City SF/semi			
Portion of City		164	2,143	11,226	13,369	125	848	7,128	7,976
NORTH 1/2 OF CITY		190	2,632	5,442	8,074	473	4,955	7,265	12,220
SOUTH 1/2 OF CITY		663	7,587	12,707	20,294	72%			

Source: City of Calgary: Planning and Development - Growth Strategies - Geodemographics

North half of Calgary = North, Northeast, East, Northwest Sectors; South half of Calgary = Southeast, South and West Sectors

Note on SERVICED LAND: The CITY defines capacity for a serviced lot as EITHER...

Lot that has Outline plan (land use) and all five services (water, storm, sanitary, fire and transportation).

Translation: A lot which is 'available for tentative plans of subdivision'.... Which can Include....

Lot that is approved and available for a Building Permit (BP). Translation: A lot that has all services,

is subdivided and has all the approvals. This also includes those lots that have "pipes sticking out of the ground".

Process to determine Current Month's supply:

Subdivided: Takes previous months supply. Adds in the approvals for the month to get additional supply added. Then subtracts out estimated absorption using

Building Permits from the Subdivided supply. This then equals the current estimated subdivided supply.

Unsubdivided: Takes the previous months unsubdivided supply. Then adds in any approvals in outline plan/outline (unsubdivided).Then takes out the months

additional subdivided supply from this total.This then equals the current estimated unsubdivided supply.

September 2020 Estimated YTD Inventory of Pending Subdivisions
(includes serviced, partially serviced, and un-serviced subdivisions)

Pending Subdivisions						
Ha	SF/Semi	Multi	Total	# of applications	% SF/Semi	
0	0	0	0	0	0%	
24	99	2,398	2,497	4	3%	
0	0	0	0	0	0%	
2	19	62	81	2	1%	
3	121	0	121	1	4%	
5	162	0	162	2	5%	
35	401	2,460	2,861	9	13%	

Pending Subdivisions						
Ha	SF/Semi	Multi	Total	# of applications	% SF/Semi	
2	34	0	34	1	1%	
4	32	240	272	2	1%	
2	8	460	468	2	0%	
0	0	0	0	0	0%	
10	280	73	353	2	9%	
18	354	773	1,127	7	11%	

Pending Subdivisions						
Ha	SF/Semi	Multi	Total	# of applications	% SF/Semi	
13	165	418	583	2	5%	
13	165	418	583	2	5%	

Pending Subdivisions					
Ha	SF/Semi	Multi	Total	# of applications	% SF/Semi
0	0	0		0	0%
3	65	0	65	1	2%
21	250	848	1,098	4	8%
6	224	0	224	2	7%
30	539	848	1,387	7	17%

Developing & Recently Completed Suburban Communities Supply Monitoring:

Monthly reporting will be adjusted (trued up) with each SRG annual inventory report. Takes September inventory adds in new supply and subtracts out absorption

Monthly Supply Approved By Subdivision Services: September 2020												
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September 2020 (Subdivided = Tentative and Unsubdivided = Outline Plans)

Additional Supply Added Inventory

NORTH	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)			
	Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
Community	0	0	0	0	0	0	0	0	0	0	0	0
Nolan Hill	0	0	0	0	0	0	0	0	0	0	0	0
Sage Hill	0	0	0	0	0	0	0	0	0	0	0	0
Kincora	0	0	0	0	0	0	0	0	0	0	0	0
Evanston	0	0	0	0	0	0	0	0	0	0	0	0
Carrington	0	0	0	0	0	0	0	0	0	0	0	0
Livingston	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0	0	0

NORTHEAST	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)				
Community	Hectares	gFam	ulti	Fam	0	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
Citiescape	0	0	0	0	0	0	0	0	0	0	0	0	0
Saddle Ridge	1	32	0	32	0	0	0	0	0	1	32	0	32
Skyview Ranch	0	0	0	0	0	0	0	0	0	0	0	0	0
Redstone	0	0	0	0	0	0	0	0	0	0	0	0	0
Cornerstone	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	1	32	0	32	0	0	0	0	0	1	32	0	32

EAST	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)			
	Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
Community	0	0	0	0	0	0	0	0	0	0	0	0
Belvedere	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0	0	0

SOUTHEAST	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)			
	Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
Community	0	0	0	0	0	0	0	0	0	0	0	0
Copperfield	0	0	0	0	0	0	0	0	0	0	0	0
Cranston	0	0	0	0	0	0	0	0	0	0	0	0
Mahogany	0	0	0	0	0	0	0	0	0	0	0	0
Seton	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0	0	0

SOUTH	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)			
	Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
Community	0	0	0	0	0	0	0	0	0	0	0	0
Walden	0	0	0	0	0	0	0	0	0	0	0	0
Legacy	0	0	0	0	0	0	0	0	0	0	0	0
Silverado	0	0	0	0	0	0	0	0	0	0	0	0
Belmont	0	0	0	0	0	0	0	0	0	0	0	0
Pine Creek	0	0	0	0	0	0	0	0	0	0	0	0
Wolf Willow	0	0	0	0	0	0	0	0	0	0	0	0
Yorkville	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0	0	0

WEST	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)			
	Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
Community	0	0	0	0	0	0	0	0	0	0	0	0
Aspen Woods	0	0	0	0	0	0	0	0	0	0	0	0
Crestmont	0	0	0	0	0	0	0	0	0	0	0	0
West Springs	0	0	0	0	0	0	0	0	0	0	0	0
Springbank Hill	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0	0	0

NORTHWEST	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)			
	Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
Community	0	0	0	0	0	0	0	0	0	0	0	0
Haskayne	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0	0	0

CITYTOTAL	Subdivided Land & Units (A)				Unsubdivided Land & Units (B)				Total Additions (A+B)			
	Ha	SF/Semi	Multi	Total	Ha	SF/Semi/Row	Multi	Total	Ha	SF/Semi	Multi	Total
	1	32	0	32	0	0	0	0	1	32	0	32

Source: City of Calgary: Planning and Development – Growth Strategies – Geodemographics

North half of Calgary = North, Northeast, East, Northwest Sectors; South half of Calgary = Southeast, South and West Sectors

Note on SERVICED LAND: The City defines capacity for a serviced lot as EITHER...

Lot that has Outline plan (land use) and all five services (water, storm, sanitary, fire and transportation). Translation: A lot which is "available for tentative plans of subdivision.".... Which can Include....

Lot that is approved and available for a Building Permit (BP). Translation: A lot that has all services, is subdivided and has all the approvals. This also includes those lots that have "pipes sticking out of the ground".

Monthly Absorption: September 2020

Yearly Average Absorption: September 2018 - September 2020

Building Permits				
Ha	SF/Semi	Multi	Total	
0	0	0	0	
1	8	72	80	
0	0	0	0	
0	10	0	10	
0	12	0	12	
1	24	10	34	
3	54	82	136	

Yearly Average Absorption		
SF/Semi	Multi	Total
53	116	169
95	372	466
0	32	32
118	5	123
199	51	250
283	22	305
748	599	1,347

Building Permits				
Ha	SF/Semi	Multi	Total	
0	5	0	5	
1	19	0	19	
0	0	32	32	
0	9	0	9	
3	49	0	49	
5	82	32	114	

Yearly Average Absorption		
SF/Semi	Multi	Total
125	146	271
214	23	237
0	379	379
186	66	252
307	64	372
832	678	1,510

Building Permits				
Ha	SF/Semi	Multi	Total	
0	0	0	0	
0	0	0	0	

Yearly Average Absorption		
SF/Semi	Multi	Total
0	0	0
0	0	0

Building Permits				
Ha	SF/Semi	Multi	Total	
0	0	0	0	
1	7	8	15	
1	16	0	16	
0	8	0	8	
2	31	8	39	

Yearly Average Absorption		
SF/Semi	Multi	Total
23	15	39
120	39	159
231	0	231
174	440	614
548	494	1,042

Building Permits				
Ha	SF/Semi	Multi	Total	
2	18	83	101	
1	11	12	23	
0	0	0	0	
0	7	0	7	
0	4	0	4	
1	20	0	20	
0	1	0	1	
5	61	95	156	

Yearly Average Absorption		
SF/Semi	Multi	Total
132	126	258
134	74	208
8	3	11
81	67	147
50	3	52
78	2	80
89	23	112
571	296	867

Building Permits				
Ha	SF/Semi	Multi	Total	
0	1	0	1	
0	0	0	0	
0	5	0	5	
1	3	22	25	
1	9	22	31	

Yearly Average Absorption		
SF/Semi	Multi	Total
22	91	113
71	42	113
40	77	117
19	13	32
151	223	374

Building Permits				
Ha	SF/Semi	Multi	Total	
0	0	0	0	
0	0	0	0	

Yearly Average Absorption		
SF/Semi	Multi	Total
3	0	3
3	0	3

Building Permits				
Ha	SF/Semi	Multi	Total	
15	237	239	476	

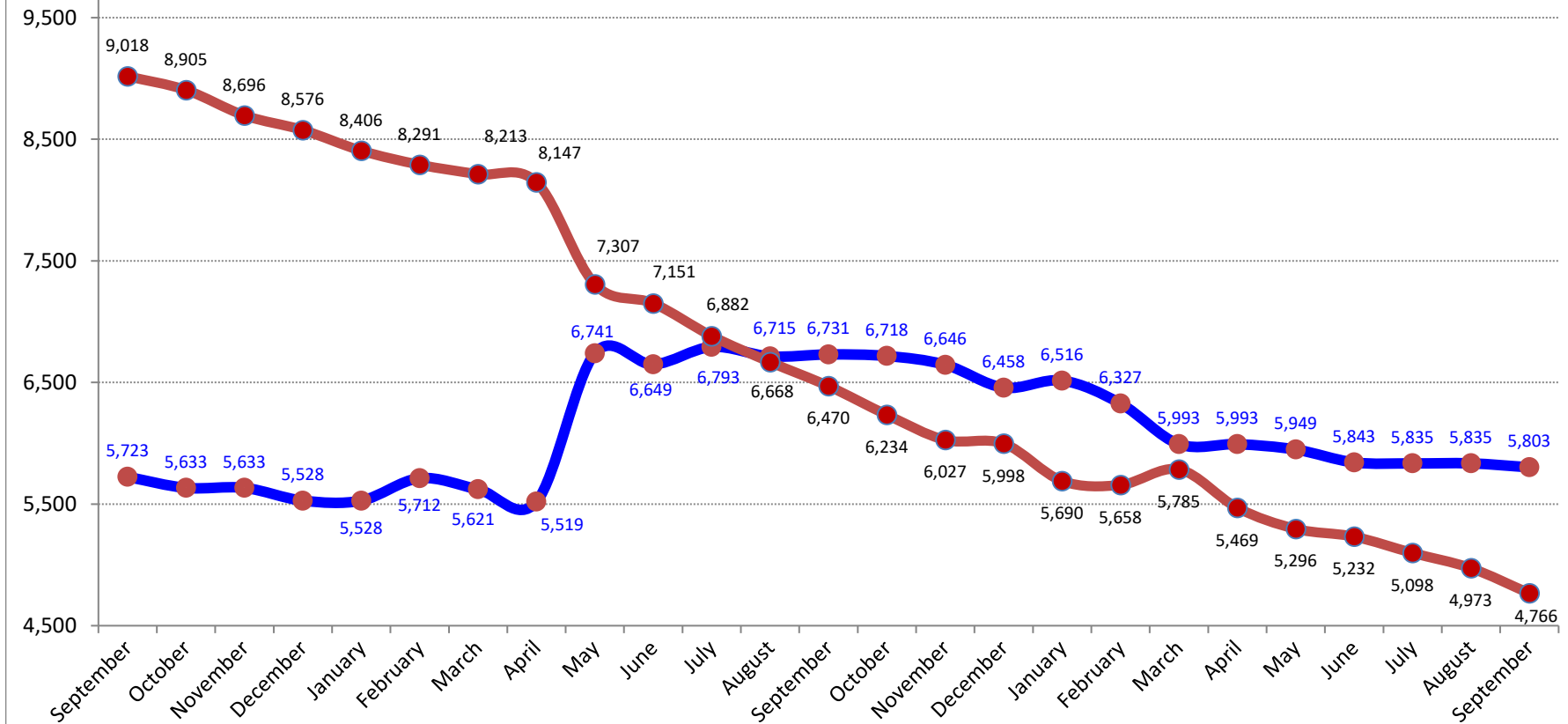
Yearly Average Absorption		
SF/Semi	Multi	Total
2,852	2,290	5,143

Single Family/Semi/Row Suburban Subdivided & Unsubdivided Unit Capacity Served (September 2018 to September 2020)

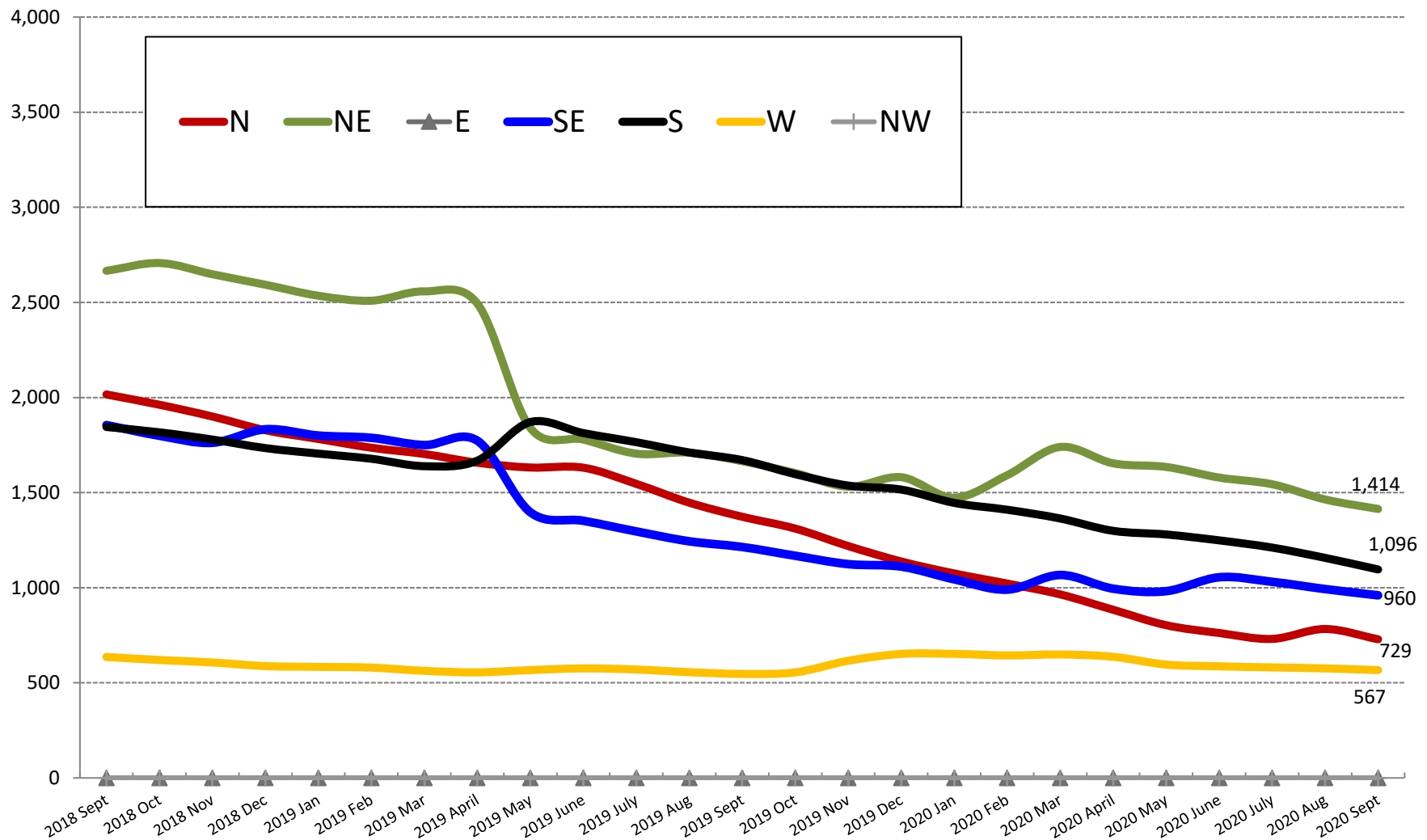
Unsubdivided and Serviced lands with approved land use (outline plan) in place available to industry for submissions of subdivision plans (anticipated units from approved plans).
The Red Line is the monthly supply or capacity of units with vacant registered lots and/or approved subdivision.

Unsubdivided capacity adjusted by adding additional 1,900 units for outline plan(s) approved in Keystone ASP areas as the transportation cap increased from 1,400 to 3,300.

SF/Semi/Row Unsubdivided
SF/Semi Subdivided



Single Family/Semi Suburban Subdivided unit Capacity Serviced By Sector (September 2018 to September 2020)



What is the City Serviced Definition?

The definition of “serviced land” has been expanded. Previously, “serviced” has been defined as having City water, storm, and sanitary infrastructure in place **providing capacity** for development for industry.

Now “serviced” represents those Five leading infrastructure services of **Water, Storm, Sanitary, Transportation and Fire** having **infrastructure capacity in place** by either the developer or The City. **These are areas where the services are either installed by The City or provided by the developer without further City expenditures.**

These lands are **comprised of two types of measures** those that have local on-site services in place and those that do not have local on-site services in place but do have capacity within City infrastructure to accommodate their development.

The CITY defines capacity for a serviced lot as EITHER...

(A) A lot that has Outline plan (land use) and all five services (water, storm, sanitary, fire and transportation). Translation: A lot which is ‘available for tentative plans of subdivision.’

.... Which Can Include....

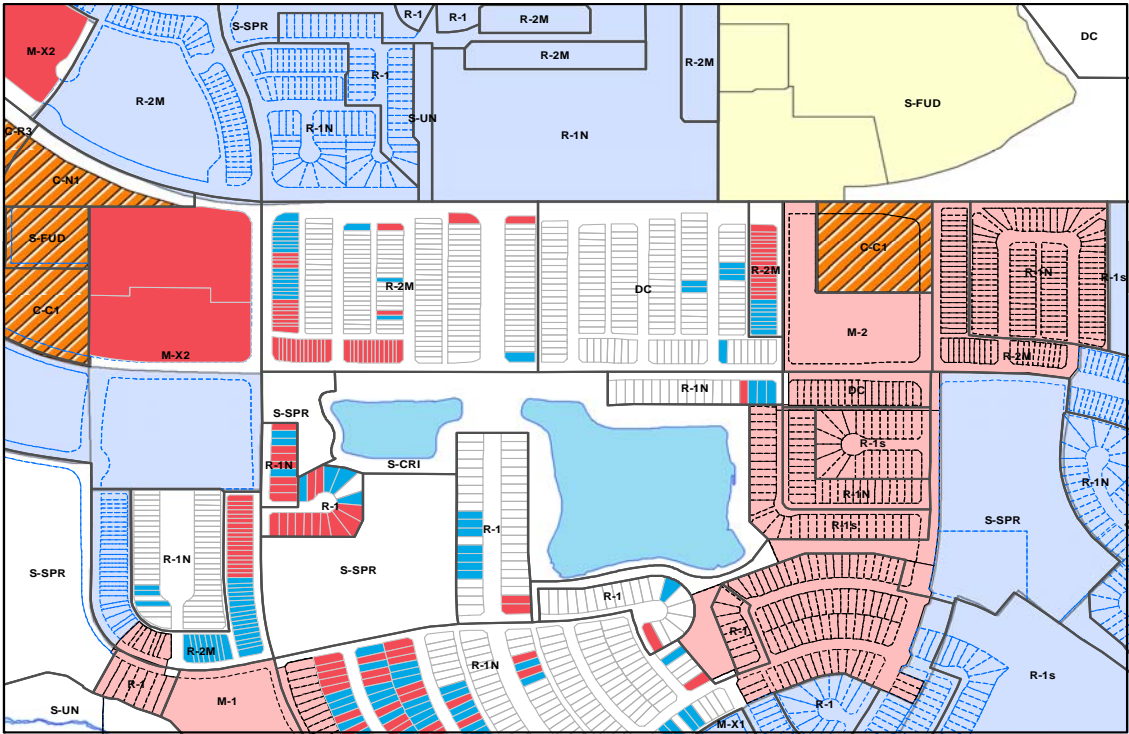
(B) A lot that is approved and available for a Building Permit (BP). Translation: **A lot that has all services, is subdivided** and has all the approvals. This also includes those lots that have “pipes sticking out of the ground”.

The INDUSTRY (builders) defines a serviced lot as ..

(C) A lot with all approvals and services and ready for construction. Translation: A lot ready for a BP that has pipes ‘sticking out of the ground’.

- In Calgary, shallow utilities are not a requirement for a BP and sometimes builders will accept a lot with the expectation of shallows being forthcoming, but for the most part the definition of a serviced lot from a builder’s point of view means they have the necessary services to construct.

Sample screenshot of City of Calgary detailed inventory.



Sample of Vacant Suburban Residential Land Inventory



Understanding the Available Supply (of Lands available to the development industry)

Unsubdivided Serviced with Land Use Approved

These areas are fully serviced (no further City infrastructure is required) have land use and outline plan in place. These areas are available for tentative plan submissions by the Developer to the City for delivery to the market of serviced single family/semi-detached and multi-family lots. (The developer still has to apply for subdivision and pay for the final service connections from City infrastructure to every individual lot and create fully serviced parcels, and they do tend to delay this final cost in keeping with demand from the building community).

At this point – the lands have Approved ASP/OP/are fully serviced and are lying fallow until tentative plans are submitted - The City has little to say about the timing/delivery of the final serviced lot to the home builder. The City waits for the industry to submit tentative plans on this land. Conforming to the approved land use the tentative plans are generally processed within the standard '60 day' window.

Data Source

Inventory data is collected from Developer submitted “anticipated” units from both Land Use approvals and Subdivision approvals submissions

Caveats? And Issues with Monitoring

Understanding the Data

As many in the residential construction and land development industry are aware, there is an annual lot count analysis compiled by a private company that physically observes how many single family lots have deep utilities installed (“water valve/pipe out of the ground”) which typically indicates construction of a house can occur on a site

In the new report, *The Developing Suburban Communities Supply Monitoring Report*, developed jointly between The City of Calgary with UDI-Calgary and CHBA-Calgary Region takes into account these fully serviced lots and also captures lots that have been granted subdivision approval (approved tentative plan). City leading infrastructure is in place but the lots still require utility servicing by the developer.

There may be a gap in the serviced supply indicated by the private lot count analysis and the numbers contained within this new report. This potential gap would be due to the additional information collected as indicated above, along with other changes in methodology that include time of year the initial data is compiled and the number of building permits recorded monthly.

It is important to note that any difference between the reports should not be seen as a deficiency of either reporting mechanism but rather an opportunity for the industry to gain a better understanding of the number of lots expected to come on stream within the near term as the lot servicing is completed (and become construction ready). This is a positive step forward as in the past this information has been very difficult to obtain.

Bulding Permit Land Area Estimates

As we do not have land area calculations for the Building Permits information a proxy to calculate the land area is used. This is done by simply taking the derived mathamatically calculated Units Per Hectare values of the subdivided lands as taken from the original April Land inventory. This is a reasonable method to determine the land area of the permits as these are the same areas that are currently considered subdivided and we know the units and remaining land, densities and the number of permits or units from these lands.

Negative Values Reported?

The detailed Suburban Lands Inventory is compiled using Civic Census, Registered vacant lots and Developer "Anticipated Units" as the starting point of the inventory dated April of each year. As monthly monitoring is done after the inventory there are cases where the Subdivision approval for lots and units may be higher than what The City Inventory originally recorded in April. This is true of building permits as well. In cases where this happens a negative number may be the result.
i.e., Anticipated units in Evanston may be for 300 single family units and 400 multi units on a particular land use site area. However as the subdivision and building permits are applied for there could be a case that it ended up being 310 single family and 480 multi units. This would cause the negative number. This would be adjusted in the next detailed Suburban Residential Growth detailed inventory (yearly report).

Amendment of Outline Plan

Any amendment of an approved Outline Plan was not included to avoid double counting in Monthly report, but annual adjustment will be made to reflect the changes.

Cancelled Building Permit

The Developing Suburban Communities Supply Monitoring Report report does not reflect changes for cancelled building permits, but annual adjustment will be made to reflect the changes.

Census Dwelling Count for Under-construction Dwellings

The Developing Suburban Communities Supply Monitoring Report uses Civic Census dwelling count as the base number. Under construction dwellings could be missed out if foundations are not in place or addresses are not posted properly.

Subdivision of Multi-family Sites

Multi-family sites usually go through multiple subdivision applications to create legal lots (units) that could be sold to individuals. For the purpose of Lot Supply report, UDA and City of Calgary agreed to count the very first subvission application of the sites, and the number of units are determined by the anticipated units from approved Outline Plans.

[Pending Subdivision Applications](#)

These are the subdivision applications that are accepted by the City and waiting for a decision. These may be fully serviced (no further City infrastructure is required), partially serviced (some services in place), or no services in place at all. Reported applications in this report does not guarantee approval of the applications. Subdivision authority may approve or refuse these applications based on their planning merits.

[Annual True-up](#)

The annual true-up process takes the April 2015 land supply information from the Suburban Residential Growth (SRG) 2016-2020 report as the new starting point. By taking the SRG numbers for monthly lot supply report, the process eliminates any double counting and under estimation of land supply.

It is important to note that the SRG land absorption is based on 2015 Civic Census data, whereas the monthly lot supply report uses issued building permits as absorption. As the Civic Census counts existing and under construction buildings as absorption, SRG report provides the true picture of the estimated vacant subdivided land capacity in a community.

For unsubdivided land supply, the SRG uses both Outline Plans (OPs) and land use redesignation applications, whereas the monthly report only uses the very first Outline Plan application for an area and excludes all land use redesignation applications. So, by using the SRG unsubdivided supply as a starting point, the monthly report addresses any reconfigured OPs and land use redesignations.

