

LOW DENSITY RESIDENTIAL LOT ABSORPTION AND SUPPLY

Edmonton

2024 ANNUAL REPORT

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

SUMMARY

This report analyzes the absorption of low-density residential (LDR) lots within Edmonton's developing area, at both neighbourhood and district levels. LDR development metrics are used to measure the rate of lot absorption and assess the remaining potential lot supply. For this analysis, LDR includes all lots planned for single-detached or semi-detached houses, excluding country residential properties.

An LDR lot is considered absorbed once it is registered at Alberta Land Titles, making it legally available for development. Total absorption is defined as the number of low-density residential lots registered each year within approved area and/or neighbourhood statutory plans. The registration of low-density lots indicates the neighbourhood development stage; lot absorption is followed by lot servicing, which includes the installation of underground and shallow utility infrastructure.

Potential lot supply refers to the estimated number of unregistered LDR lots within approved Area Structure Plans (ASPs), Neighbourhood Area Structure Plans (NASPs), Servicing Concept Design Briefs (SCDBs) or Neighbourhood Structure Plans (NSPs). The potential lot capacity of a neighbourhood may fluctuate due to amendments made to an approved Plan during its implementation, and the flexibility inherent in the Zoning Bylaw. Annual reports on lot absorption reflect these changes. Appendix 1 details the current potential lot capacity for each developing neighbourhood. For information regarding changes in potential lot capacity, please compare with [previous reports](#).

This report offers a comprehensive analysis of lot absorption and supply over the past year. It provides valuable insights into the dynamics of the residential land market, including the rate at which lots are being absorbed and the availability of new lots to meet the LDR demand in Edmonton.

More in-depth exploration can be found on the [interactive dashboard](#) featured on the growth monitoring and analysis [webpage](#). This tool allows users to manipulate and visualize the data in various ways, enabling a more customized and detailed analysis of lot absorption and supply trends. The dashboard complements the static report by offering a dynamic and interactive tool for data exploration and analysis.

OVERALL LOT ABSORPTION

Lot absorption in 2024 decreased by nine per cent compared to 2023, from 3,347 lots in 2023 to 3,056 lots (Figure 1). The annual average for the most recent five-year period (2020-2024) was 3,432 lots, slightly exceeding the 3,397 lot annual average reported for the previous five-year period in the [2023 Lot Absorption and Supply Report](#).

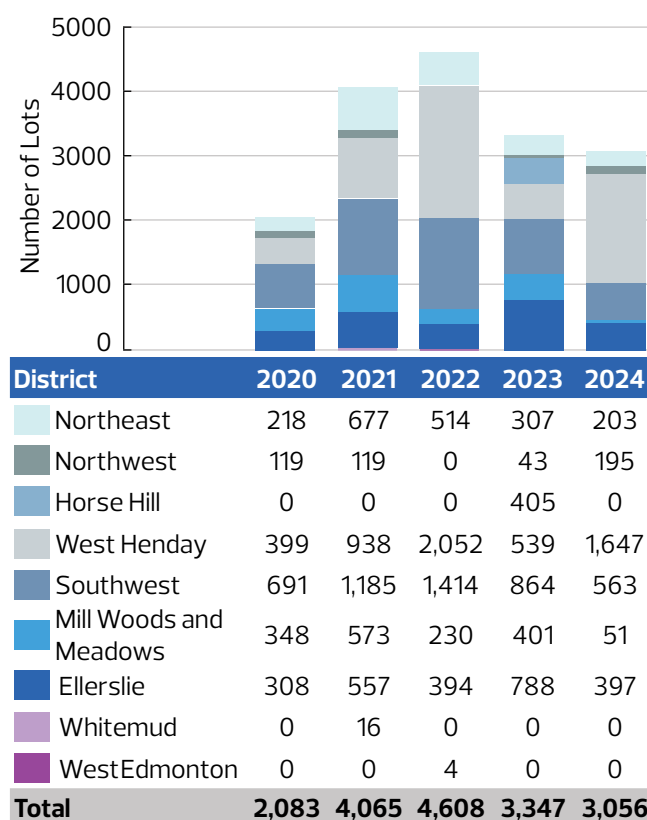


Figure 1. Annual LDR Lot Absorptions by District

Note: Figure 1 provides a year-end snapshot of annual LDR absorption data. For the most current information, please refer to the [interactive dashboard](#), which is updated quarterly and may differ from the data in this report. The dashboard's historical data includes adjustments due to delayed data entries that are not reflected in this report. Future reports will be updated to show the most up-to-date datasets on the dashboard.

DISTRICT LOT ABSORPTION

At the district level, West Henday had the largest number of lots absorbed, (1,647 lots), accounting for about 54 per cent of total absorption. Southwest had the second highest lot absorption (563 lots) accounting for 18 per cent of total absorption. The remaining districts, including Ellerslie, Northeast, Northwest and Millwoods & Meadows, all combined (846 lots), accounted for about 28 per cent of the total in 2024 (Figure 1).

Horse Hill, Whitemud and West Edmonton Districts had no lots absorbed in 2024. Development in Horse Hill appeared to accelerate in 2023 when it recorded 405 lots absorbed. However, LDR development in this district has servicing challenges that are impacting the rate of development. West Edmonton has zero (0) LDR lots remaining, indicating no opportunities for additional lot absorption. LDR lots in developing area neighbourhoods (outside Anthony Henday and north of 41 Avenue SW) in the Whitemud District are approaching planned or approved capacity, with the exception of the Mactaggart neighbourhood, which has remaining potential of LDR lot supply (Figure 2).

The annual absorption trends in Figure 1 above further indicate a peak in 2022 for the Southwest, followed by a two-year decline. The Northeast and Millwoods experienced a three-year decline after peaking in 2021. In contrast, the Northwest, West Henday, and Ellerslie exhibited more variable absorption patterns.

Given the current LDR lot absorption and servicing patterns (as outlined in the [2024 Lot Servicing Report](#)), LDR development is likely to be concentrated in the Ellerslie, West Henday and Southwest districts as they contain the greatest number of remaining potential LDR lots (Figure 2). Even though Horse Hill has the third highest remaining potential lot supply, its development outlook remains uncertain. See Appendices 1 and 2 for details of LDR lot absorption and supply at the neighbourhood level.

REMAINING POTENTIAL LOT SUPPLY

Planned lot supply refers to capacity approved in an ASP without a corresponding approved NSP in effect. Developing lot supply refers to capacity in an approved NSP. Together, Ellerslie,

West Henday and Horse Hills have the largest remaining potential lot supply for LDR development, accounting for over 54,000 LDR lots. This is comprised of 28,442 planned LDR lots remaining in approved ASPs (not ready for development yet) and 25,588 LDR lots remaining in

68,240
Number of potential LDR lots available in approved ASPs and NSPs, as of December 2024.

approved NSPs (ready for development). The supply in these three districts represents about 79 per cent of the total remaining LDR lot supply.

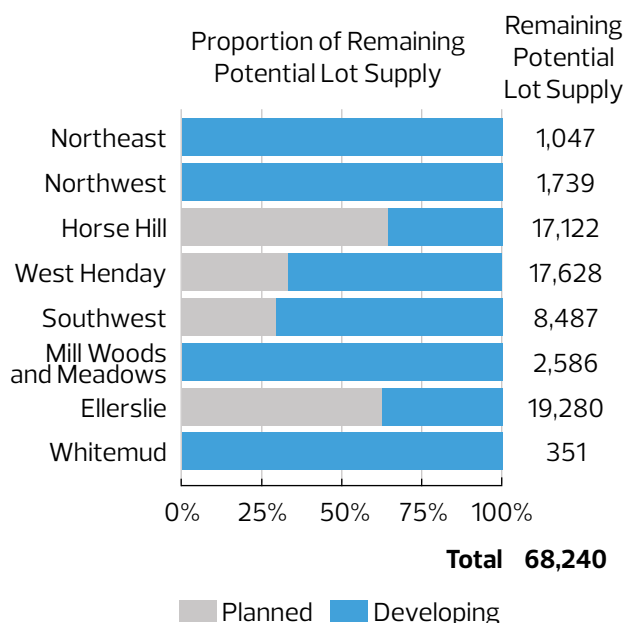


Figure 2. Potential LDR Lot Supply, by District (2024)

Note: The remaining potential LDR lot supply decreased from 71,529 in 2023 to 68,240 in 2024, a difference of 3,289 lots. The actual lot absorption in 2024 was 3,056 lots. This difference of 233 lots is attributed to adjustments in lot capacity due to NSP amendments and lot absorption exceeding the planned capacity (see below for more details on this topic).

Of the remaining potential lot supply, at least 30,892 lots (45 per cent) are within approved ASPs but still pending NSP approval (Appendix 2). The decrease in the remaining potential lot supply from 2023 to 2024 is due to absorption in the neighbourhoods with approved NSPs. The current LDR lot supply is sufficient to support demand up to [The City Plan's](#) 1.5 million population milestone and beyond, based on a five-year annual average of 3,432 absorbed lots. New housing of other densities, such as medium and high density development (see the [2024 Approved Net New Dwellings Report](#)), as well as existing housing, also continues to support demand. While 2023 and 2024 saw record-high population growth, the rate of population growth is expected to moderate, as identified in the City's [Spring 2025 Economic Outlook Summary](#).

Map 1 illustrates the spatial distribution of total absorbed LDR lots for developing neighbourhoods with approved plans. As of December 2024, the neighbourhoods with the highest number of absorbed LDR lots were in the Southwest, West Henday, and Ellerslie districts.

LDR LOTS BEYOND PLANNED CAPACITY

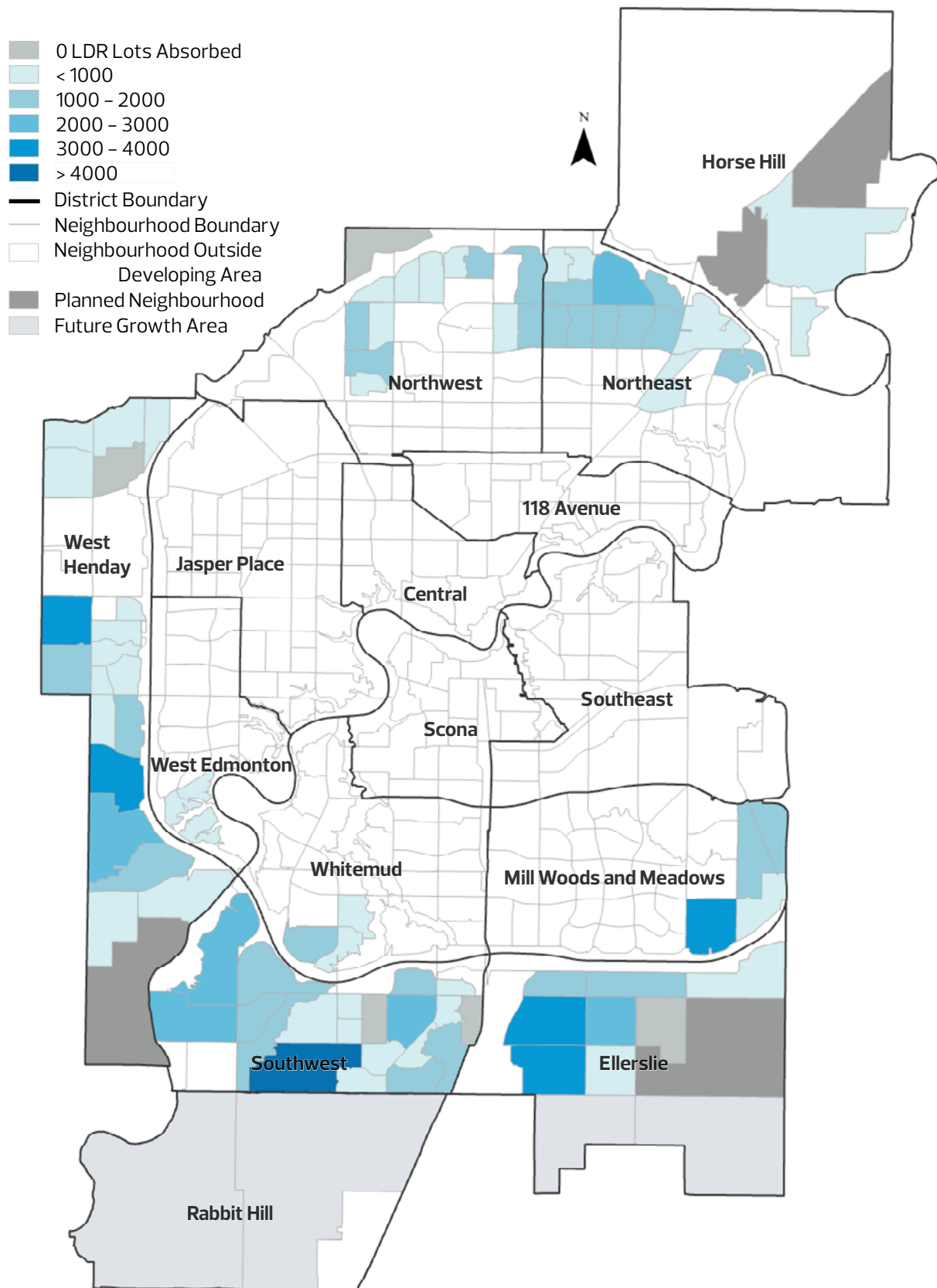
Some neighbourhoods continue to have absorption activity despite having reached their approved LDR lot capacities (Figure 3). Ongoing LDR absorption occurs when lots are rezoned from medium density to low density development or are within a direct control zone that allows low density development.

In 2024, 231 total LDR lots were absorbed beyond the planned LDR capacity of the Secord, Paisley and Klarvatten neighbourhoods. This occurred within the West Henday, Southwest and Northwest districts (Figure 3).

District	Neighbourhood	LDR Lot Absorption Beyond Capacity
West Henday	Secord	24
Southwest	Paisley	81
Northwest	Klarvatten	126

Figure 3. Absorbed LDR Lots Beyond Planned Capacity (as of December 2024)

Analyzing all lot absorptions, including those exceeding planned capacity, provides an accurate assessment of LDR development. This reveals the differences between the initial approved statutory plan and the final development outcome, which means denser neighbourhoods to support The City Plan's estimated population of 2 million people.



Map 1. Cumulative Low Density Residential Lot Absorption, by Neighbourhood (as of December 2024)

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

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity	Remaining Potential Lots (as of 2024)	Percent of Lots Absorbed
Ellerslie	Decoteau	Alces	2,194	1,710	22%
		Meltwater	1,490	1,490	0%
	Ellerslie	Ellerslie	1,211	0	100%
		Summerside*	4,584	751	84%
	Southeast	The Orchards At Ellerslie	4,333	1,299	70%
		Charlesworth	1,377	0	100%
		Mattson	1,834	1,641	11%
		Walker	3,018	445	85%
Total			20,041	7,336	
Horse Hill	Horse Hill	Quarry Ridge	953	843	12%
		Marquis	5,563	5,265	5%
Total			6,516	6,108	
Mill Woods and Meadows	The Meadows	Aster	2,186	1,517	31%
		Laurel	3,743	125	97%
		Maple	1,524	17	99%
		Tamarack	2,226	927	58%
Total			9,679	2,586	
Northeast	Clareview Town Centre	Clareview Town Centre*	303	33	89%
	Ebbers	Ebbers*	304	51	83%
	Edmonton North	Crystallina Nera East	675	21	97%
		Crystallina Nera West	1,128	222	80%
		Ozerna*	1,193	0	100%
		Schonsee	1,340	155	88%
	Fraser	Fraser*	1,523	0	100%
	Palisades	Mayliewan*	1,202	0	100%
	Pilot Sound	Brintnell*	1,560	0	100%
		Cy Becker	1,193	0	100%
		Gorman	558	478	14%
		Hollick-Kenyon*	1,375	0	100%
		Matt Berry*	1,247	0	100%
		McConachie	2,928	87	97%
Total			16,529	1,047	
Northwest	Castle Downs Extension	Canossa	1,370	434	68%
		Chambery*	708	0	100%
		Elsinore*	1,083	0	100%
		Rapperswill	1,048	56	95%

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

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity	Remaining Potential Lots (as of 2024)	Percent of Lots Absorbed
	Edmonton North	Albany	187	0	100%
		Belle Rive*	1,147	0	100%
		Carlton	1,163	0	100%
		Eaux Claires	997	147	85%
		Klarvatten	1,620	0	100%
	Goodridge Corners	Goodridge Corners	1,102	1,102	0%
	Palisades	Cumberland*	1,603	0	100%
		Hudson	548	0	100%
		Oxford*	927	0	100%
Total			13,503	1,739	
Southwest	Cashman	Cashman*	0	0	0%
	Heritage Valley	Allard*	1,931	119	94%
		Callaghan*	905	195	78%
		Cavanagh	1,327	170	87%
		Chappelle	4,558	132	97%
		Desrochers Area	865	0	100%
		Graydon Hill*	340	0	100%
		Hays Ridge Area	1,242	846	32%
		Heritage Valley Area	393	393	0%
		Heritage Valley Town Centre	264	221	16%
		Paisley	792	0	100%
		Richford	350	0	100%
		Rutherford*	2,795	447	84%
	Heritage Valley SCDB	Blackmud Creek*	635	0	100%
		MacEwan*	1,118	0	100%
	Windermere	Ambleside	2,117	605	71%
		Glenridding Heights	1,133	0	100%
		Glenridding Ravine	2,008	333	83%
		Keswick	4,201	1,335	68%
		Windermere	4,176	1,241	70%
Total			31,150	6,037	
West Edmonton	Cameron Heights	Cameron Heights*	883	0	100%
	Wedgewood Heights	Wedgewood Heights*	453	0	100%
	West Jasper Place South	Donsdale*	505	0	100%
Total			1,841	0	

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

Planning District	Area Structure Plan	Neighbourhood	Low Density Lot Capacity	Remaining Potential Lots (as of 2024)	Percent of Lots Absorbed
West Henday	Big Lake	Hawks Ridge	1,408	1,107	21%
		Kinglet Gardens	1,557	792	49%
		Pintail Landing	861	861	0%
		Starling	1,189	483	59%
		Trumpeter Area	1,552	589	62%
	Edgemont	Edgemont	3,875	1,232	68%
		Lewis Farms	Breckenridge Greens*	427	0
	Potter Greens		510	32	94%
	Rosenthal		3,024	1,153	62%
	Secord		3,075	0	100%
	Stewart Greens		669	244	64%
	Suder Greens*	1,025	163	84%	
	Webber Greens	750	0	100%	
	Riverview	River's Edge	2,428	1,971	19%
		Stillwater	2,808	2,135	24%
		The Uplands	1,993	620	69%
	The Grange	Glastonbury*	1,818	340	81%
		Granville	1,175	420	64%
		The Hamptons*	3,460	2	100%
		Total			33,604
Whitemud	Terwillegar Heights SCDB	Mactaggart*	951	351	63%
		Magrath Heights*	997	0	100%
		South Terwillegar*	1,138	0	100%
Total			3,086	351	
TOTAL			135,949	37,348	

*Neighbourhoods with repealed plans. These are plans that have fulfilled their intended purpose and are no longer relevant in guiding development, but fall within the developing area (outside the Anthony Henday Drive), and some still have potential LDR lots remaining for future development, which is worth tracking for growth monitoring purposes.

APPENDIX 2. PLANNED NEIGHBOURHOODS POTENTIAL LOW DENSITY RESIDENTIAL LOT SUPPLY

Planning District	Area Structure Plan	Planned Neighbourhood	Low Density Lot Capacity
Ellerslie	Decoteau	Decoteau	2,761
		Kettle Lakes	5,662
		Snowberry	3,521
Total			11,944
Horse Hill	Horse Hill	Horse Hill Neighbourhood 1B	1,743
		Horse Hill Neighbourhood 3	1,293
		Horse Hill Neighbourhood 4	2,873
		Horse Hill Neighbourhood 5	5,105
Total			11,014
West Henday	Riverview	Grandisle Neighbourhood 4	1,444
		White Birch Neighbourhood 5	4,040
Total			5,484
Southwest	Windermere	Kendal	2,450
Total			2,450
TOTAL			30,892