



OCTOBER 2022

GROWTH MONITORING

 *City of*
Saskatoon

Report

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INTRODUCTION

The Growth Monitoring Report is an annual report that provides information on residential, commercial, and industrial development in Saskatoon, as well as several other growth-related indicators for the city. This report includes general demographic changes and statistical information on how the city is growing, as well as specific information on planned servicing of residential, commercial, and industrial lands, and information on potential infill projects in the city.

The report provides data that will help monitor progress towards policy goals, plan servicing needs, and inform policy and program reviews. It includes the following:

- summary of City of Saskatoon (City) guiding documents and targets;
- summary of key indicators;
- review of demand profiles;
- builder and developer inventory levels and housing market assessment;
- market absorption and new neighbourhood build-out time frames;
- inventory of infill opportunities on lands owned by the City; and
- planned servicing schedules for 2023 to 2025.

The Growth Monitoring Report is produced by the City. As part of this process, Administration collects servicing information from all major land developers in Saskatoon. The collected information is used by various departments to plan and budget for growth-related infrastructure including investments that are detailed in the Land Development Capital Budget.

CITY OF SASKATOON GUIDING DOCUMENTS AND TARGETS



CITY OF SASKATOON GUIDING DOCUMENTS & TARGETS

Official Community Plan & Strategic Plan

The Official Community Plan is a bylaw that provides a comprehensive policy framework for long-term planning and development in Saskatoon. It guides the physical, environmental, economic, social, and cultural development of our community through a broad set of goals, objectives, and policies. The City of Saskatoon Strategic Plan 2022-2025 identifies short-term (four-year) priorities for achieving those goals and objectives. The two documents work together to guide how development occurs in Saskatoon.

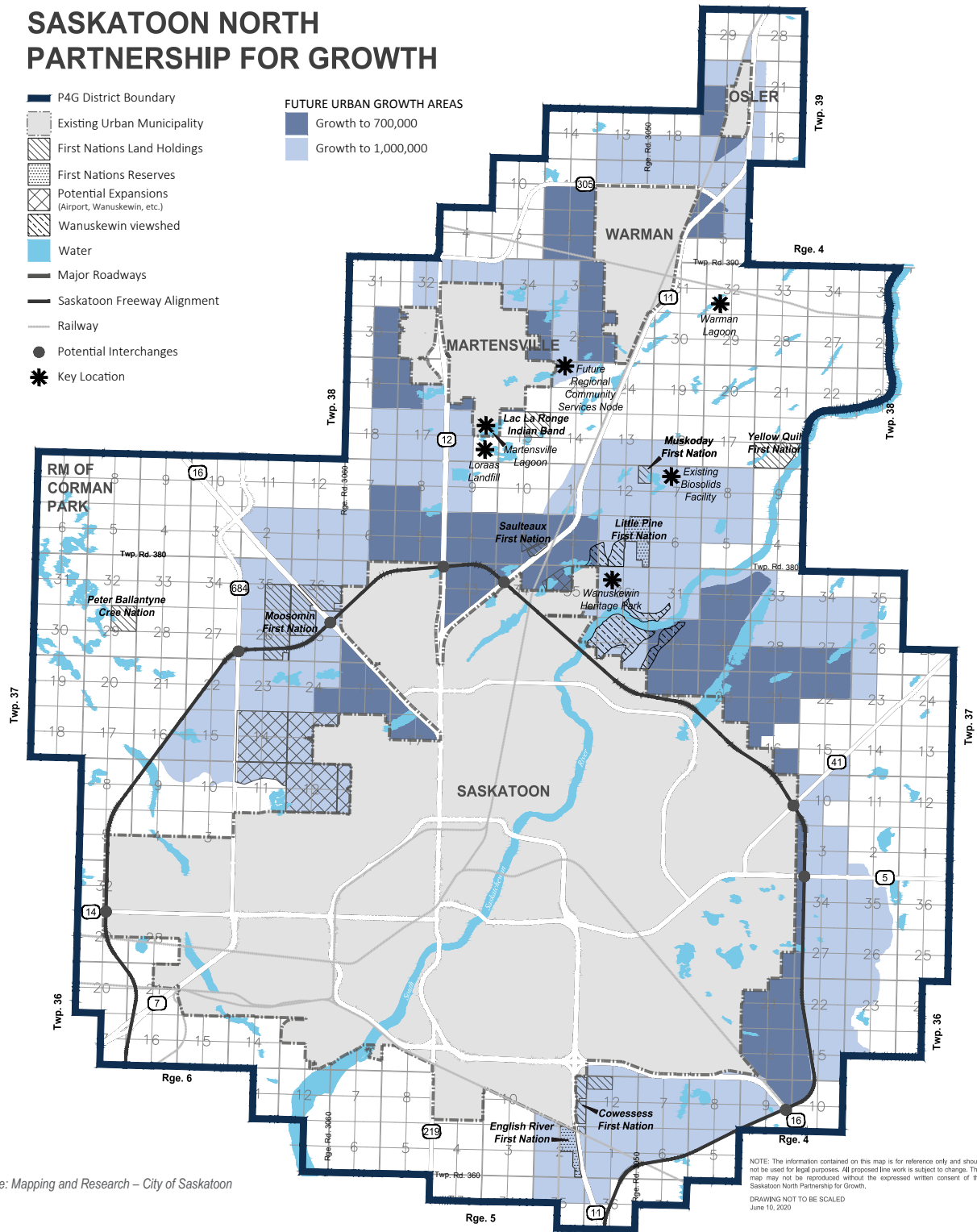
Saskatoon North Partnership for Growth (P4G) Region

The latest projections show that within the next twenty years, the Saskatoon Region will reach a population of 500,000. Given the economic climate, it is anticipated that the Saskatoon region could achieve a population of one million in the next sixty years. The region should be ready for growth, to enable economic prosperity and support the quality of life for all residents. This has reinforced the need for a more coordinated approach to regional planning and servicing. The City is the urban centre of the P4G Region. The P4G Region is comprised of the cities of Saskatoon, Martensville, and Warman, the town of Osler, and the Rural Municipality of Corman Park No. 344.



Photo Credit:
Tourism Saskatoon

Figure 1: Saskatoon North Partnership for Growth (P4G) Future Urban Growth Areas



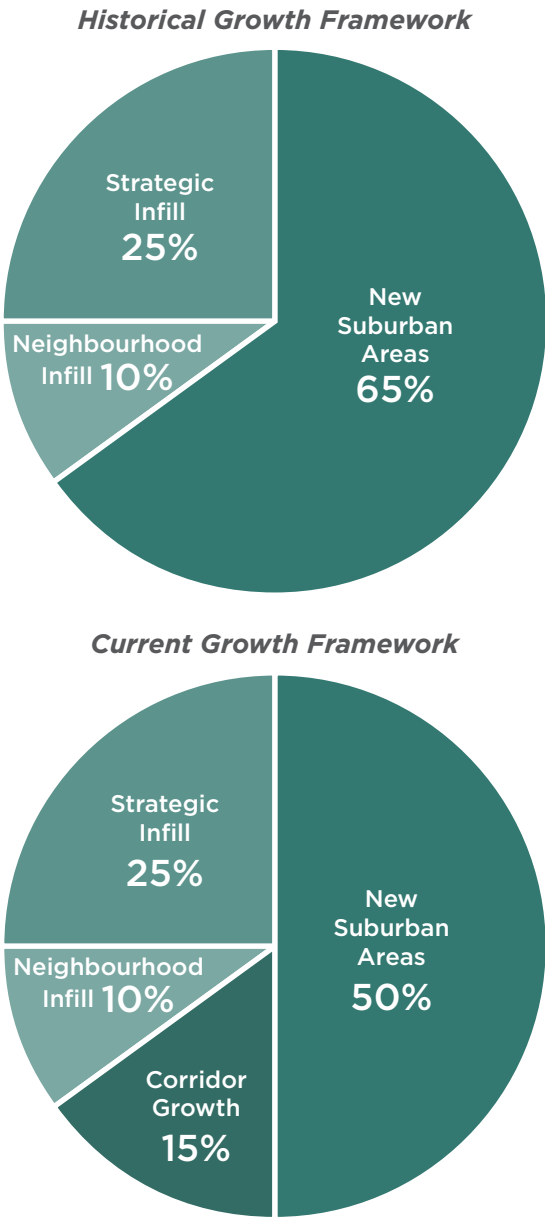
Plan for Growth

In 2016, the City approved the Growth Plan to Half a Million (Plan for Growth), which set a new direction for how the city will grow, develop, and move around. A key direction from the Plan for Growth is a shift in how and where the city will develop. It includes a goal of 50% of new growth to be infill, with 25% being Strategic Infill, 10% being Neighbourhood Infill, and 15% being Corridor Growth. This represented a substantial shift in Saskatoon’s overall growth pattern. Figure 2 compares the growth pattern that existed at the time of the Plan for Growth’s approval (February 2016) and the new direction included in the Plan for Growth.

The City currently has several projects underway or recently completed to support the direction of the Plan for Growth. These projects include the recently completed University Sector Plan for the University of Saskatchewan’s Endowment Lands (a Strategic Infill site), as well as the Corridor Planning Program that is developing plans for how Saskatoon’s major transportation corridors can be expected to change and accommodate new infill growth.

Figure 3 shows the locations of planned growth in Saskatoon, including Strategic Infill, Neighbourhood Infill, and Corridor Growth areas, as identified in the Official Community Plan. Table 1 on page five outlines detailed target levels for each area identified as part of the Plan for Growth, and actual population numbers for each.

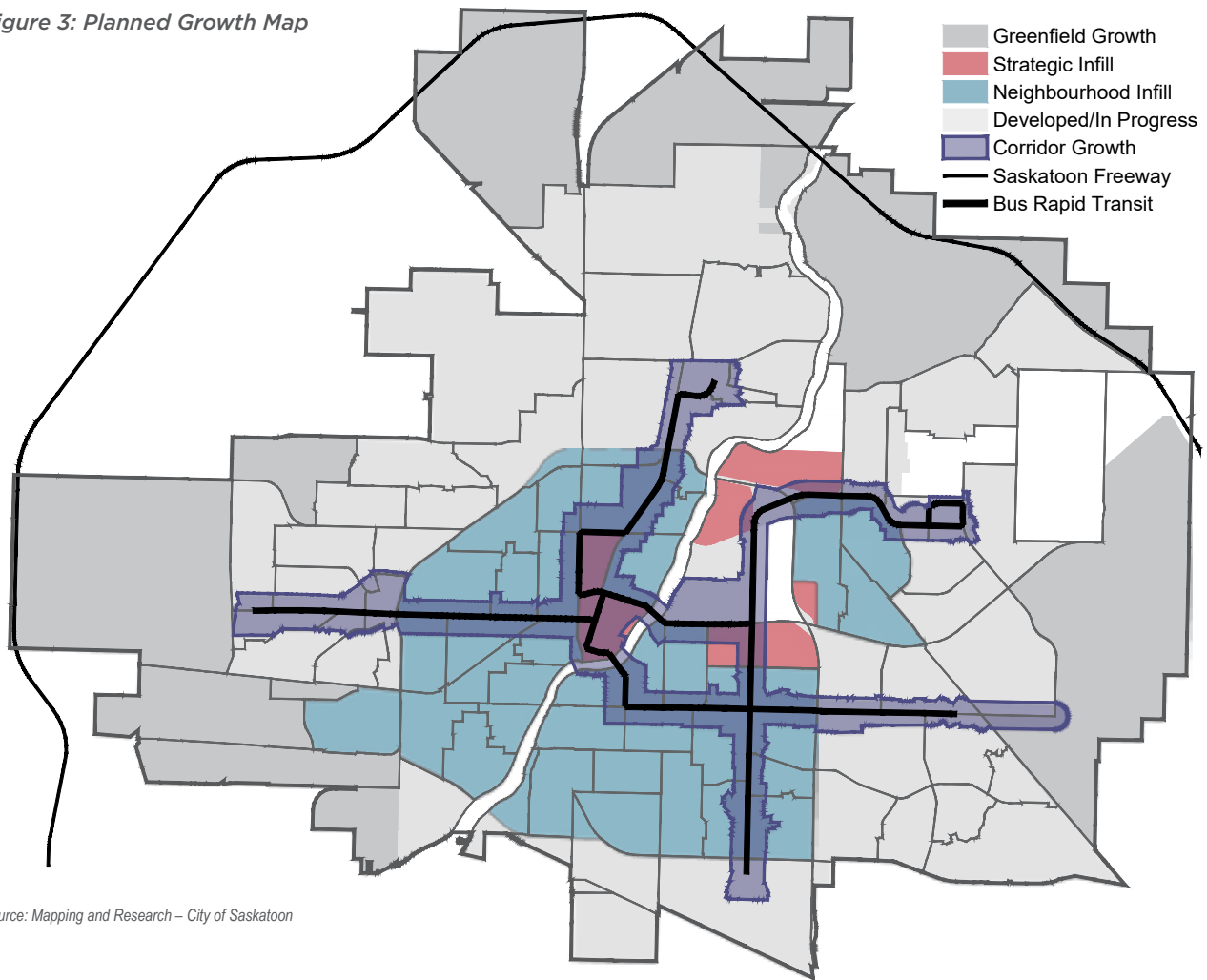
Figure 2: Distribution of Population



Source: Mapping and Research – City of Saskatoon



Figure 3: Planned Growth Map



Source: Mapping and Research – City of Saskatoon



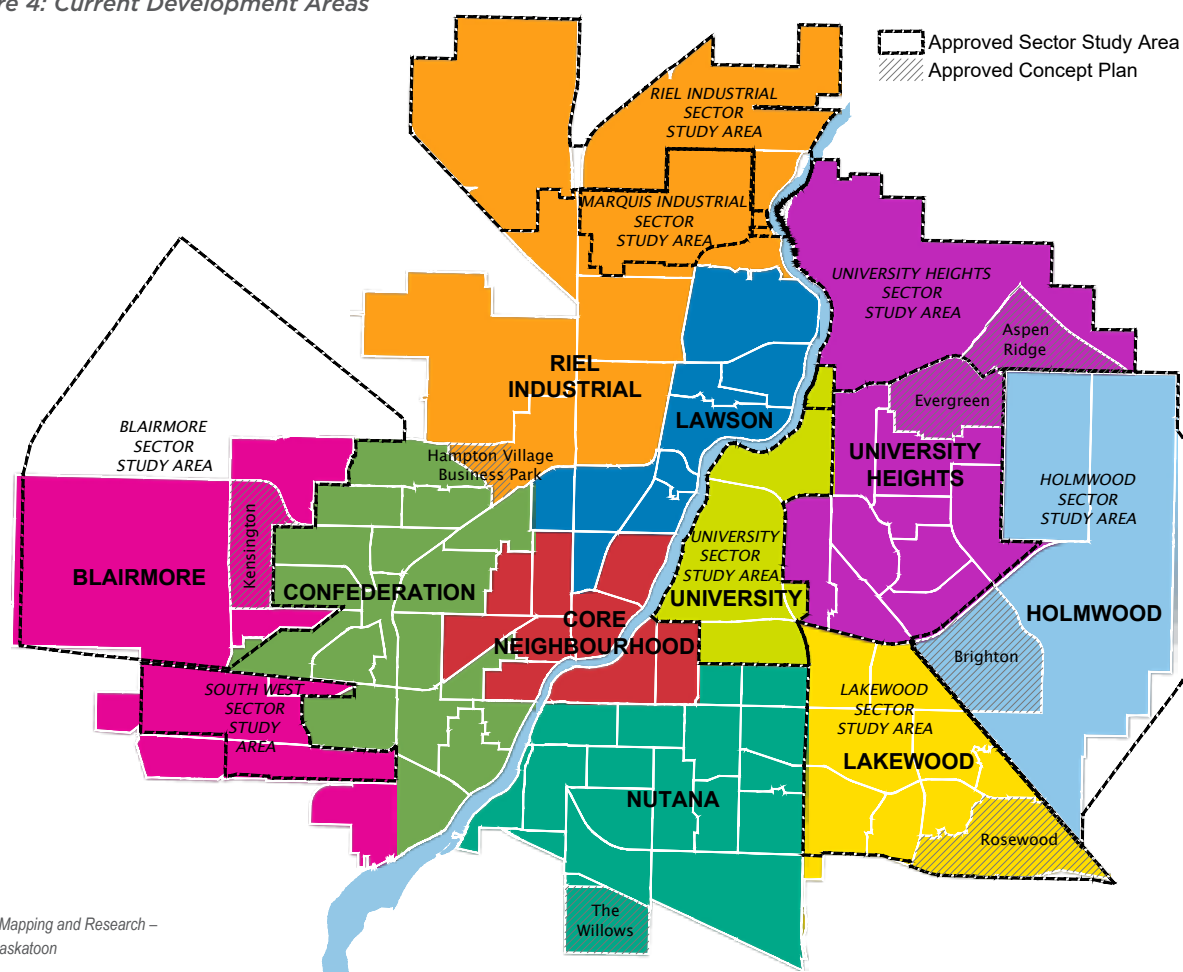
Sector Plans & Concept Plans

Sector Plans provide a framework for how large areas of land (six to ten neighbourhoods and their supporting amenities) are to be developed. They guide growth in Saskatoon by providing direction on the size and location of neighbourhoods, commercial development, major infrastructure, and open space, as well as how development will be phased.

There are currently five active residential sectors that are under development – Blairmore, Holmwood, Lakewood, University, and University Heights. In addition, the Riel Industrial Sector Plan guides industrial development in Saskatoon’s north end. The University Sector Plan, which was approved by City Council in April 2021, is the first Sector Plan developed for an existing, built-up area of the city. The completion of this Sector Plan has been a key step toward achieving the City’s infill goals. It provides the framework for the development of the largest collection of infill areas available in Saskatoon.

Once a Sector Plan is in place, a Concept Plan can then be created for an individual neighbourhood or development area within a Sector. To ensure the City achieves its vision of compact, contiguous development, residential development occurs in a phased fashion with the development of a new neighbourhood in a Sector not beginning until the preceding neighbourhood has been substantially completed. Figure 4 shows the locations of active Sectors, including areas that are currently under development. These plans, which require Council approval, ensure that growth and development occur in such a way to help achieve the overall vision and goals of the Official Community Plan.

Figure 4: Current Development Areas



Source: Mapping and Research –
City of Saskatoon

Table 1 outlines the Plan for Growth target population for each category of infill and greenfield development. The population projections are based on the City Council approved Plan for Growth, Sector Plans, and Concept Plans. The current population is based on Census Population Data. For a full detailed summary of approved Sector Plan calculations, including Municipal Reserve dedication requirements for each Sector, please refer to Appendix 1.

Table 1: Plan for Growth Population Target Rates

	Plan for Growth Rate Target	Current Population (2022)	Target Population (Growth to 500,000)
Strategic Infill	25%		
Downtown		3,556	18,000
North Downtown		164	10,000
University Sector		1,270	57,147
Corridor Growth	8 - 15%		+ 26,500*
Neighbourhood Infill	10%		
Confederation Sector		64,495	65,000
Core Neighbourhood Sector ¹		32,712	37,500
Nutana Sector (Infill Areas) ²		43,226	49,000
Lawson Sector		30,206	32,500
Greenfield Development	50%		
Holmwood Sector		2,245	76,143
University Heights Sector		47,736	79,464
Blairmore Sector		5,543	72,168
Lakewood Sector		46,965	48,755
Nutana Sector (Greenfield Areas) ²		15,540	15,540
TOTAL		285,049	587,717

* The 26,500 target population is in addition to the current population that exists within the Corridor Growth Boundary. The current population within the Corridor Growth Boundary is reflected in each respective neighbourhood and sector boundary.

¹ Core Neighbourhood Sector excludes Downtown & central Industrial (North Downtown).

² Nutana Sector Includes both Greenfield and infill areas. Stonebridge and The Willows are identified as Greenfield Development areas. The remainder of the areas are identified as Neighbourhood Infill areas.


³ Current population is based on SHA population data (showing 293,658) that is used in the neighbourhood profiles. These estimates can be overestimated based on health card data accuracy. COS estimate has been used as the total estimated population in this scenario.

Table 2 below identifies the past five years of growth broken down by the growth rate displayed for each growth category, as identified by the Plan for Growth. This information highlights the trends regarding strategic growth, along with future efforts that may be needed to ensure the growth rates for each category strive to meet the targets outlined within the Plan for Growth. The percentages within the table below are based on building permit issuance per year.

Table 2: Growth Rate Scenarios (2018 - 2022*)

	Target Rate	2018	2019	2020	2021	2022*	Average (2018-22*)
Strategic Infill Development	25%	12%	0%	0%	0%	0%	1%
Corridor Growth	8 - 15%	8%	5%	20%	3%	3%	14%
Neighbourhood Infill	10%	6%	5%	7%	7%	7%	9%
Greenfield Development	50%	74%	90%	73%	91%	80%	76%

* 2022 year to date. Source: Building Standards – City of Saskatoon



Sector Plans provide a framework for how large areas of land (six to ten neighbourhoods and their supporting amenities) are to be developed.

Photo credit: Tourism Saskatoon/Chris Hendrickson Photography



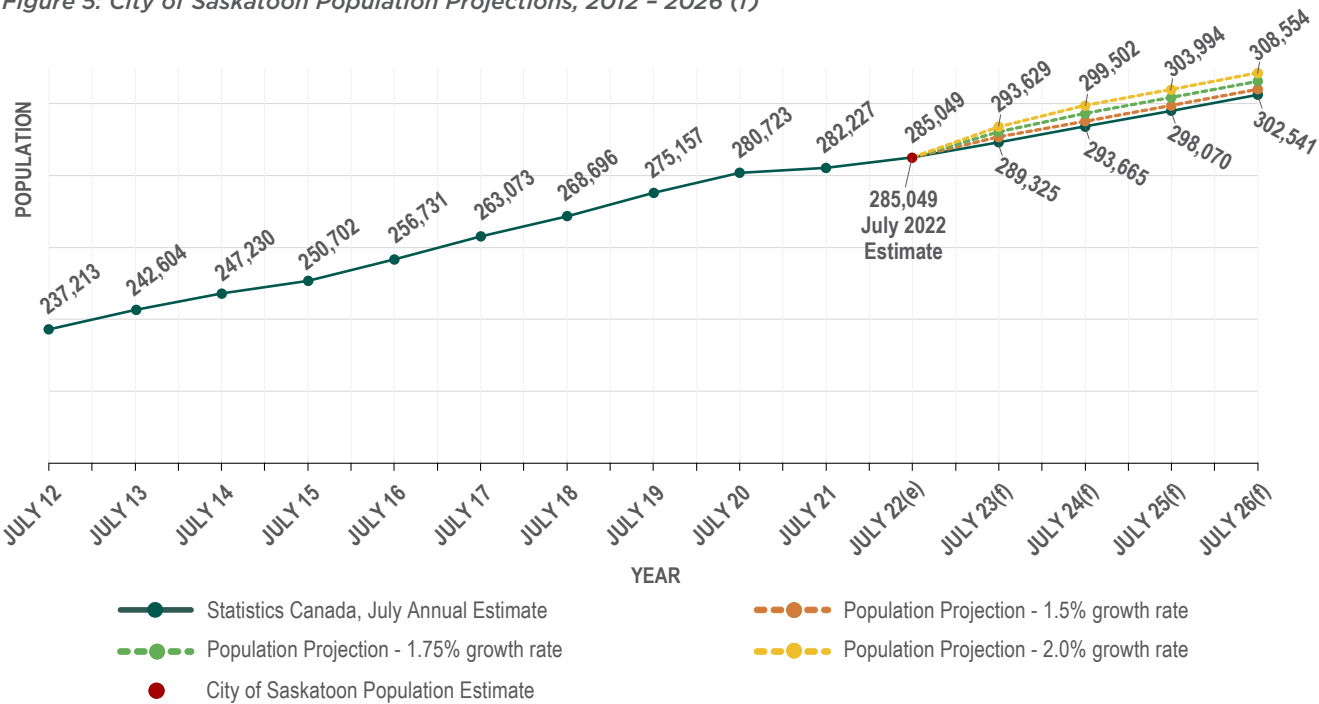
KEY INDICATORS

KEY INDICATORS

Population

Over the past 10 years, Saskatoon has experienced substantial population growth. Based on the City’s annual population estimates, Saskatoon has been growing at an average annual rate of 1.9% for the last 10 years (2012 to 2022) and 1.2% for the last 3 years (2019 to 2021). The City’s estimated population of Saskatoon is 285,049 as of July 1, 2022. While growth rates have moderated from the more robust growth rates experienced prior to 2015, Saskatoon is still experiencing steady population growth. The projected population growth rate for Saskatoon in 2022 is estimated to be 1%. The actual rate at which growth will occur is unknown but projecting various growth rates allows the City and land developers to plan for adequate levels of serviced land and support amenities to meet demand in these scenarios. Population projections for growth rates from 1.5% to 2.0% are shown in Figure 5.

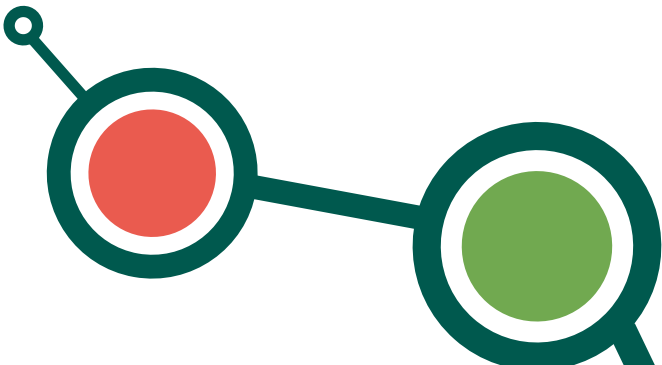
Figure 5: City of Saskatoon Population Projections, 2012 – 2026 (f)



Source: Statistics Canada, July Annual Population Estimates (based on 2016 Census data) City of Saskatoon Population Projection

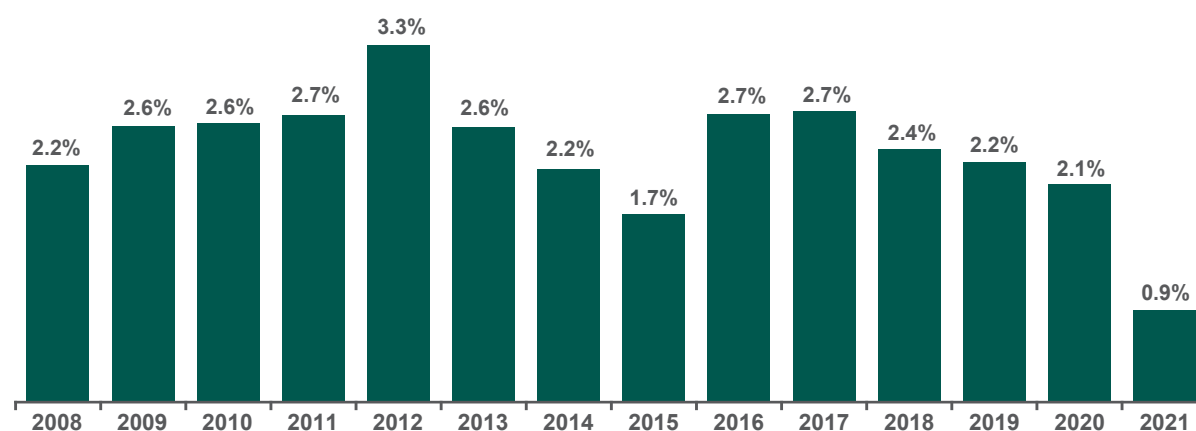
Population change drives the demand for new housing. A stable or declining population will reduce housing demand to that required to replace old or inappropriate housing stock. On the other hand, a growing population drives demand for the investment in, and construction of, new housing.

The population growth rate for the Saskatoon Census Metropolitan Area (CMA) has experienced a similar moderation as Saskatoon, achieving 0.9% in 2021. The annual average growth rate over the past ten years has been 2.28%.



Gross Domestic Product Growth

Figure 6: Saskatoon CMA Growth Rate, July 2008 – 2021



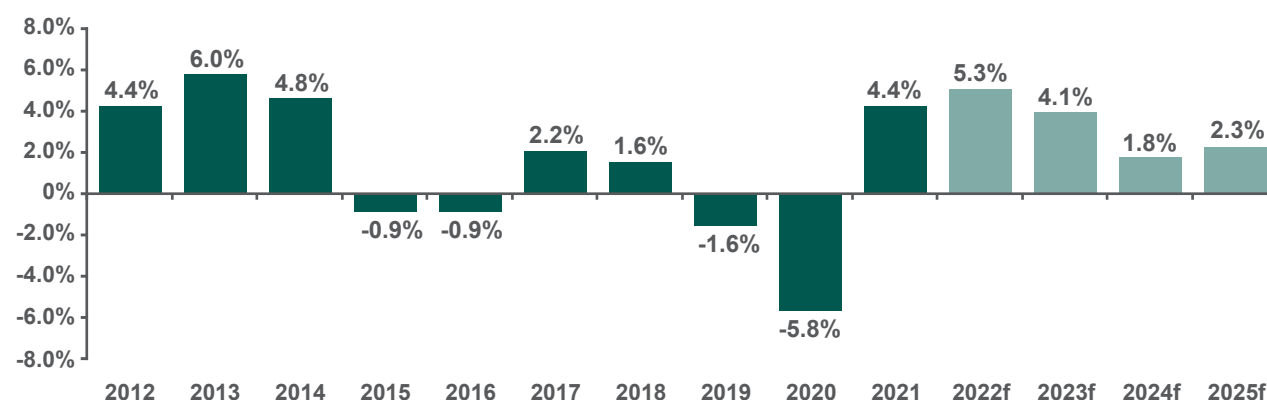
Source: Statistics Canada. Table 051-0056 - Estimates of population by census metropolitan area, sex and age group for July 1, based on the Standard Geographical Classification (SGC) 2016, annual (persons)

Gross Domestic Product (GDP) is the total dollar value of all unduplicated goods and services produced in an economy. It is the total amount of productive economic activity occurring within a region, during a given period, and expressed in dollar value. GDP is measured in three ways: (1) by income; (2) by expenditure; and (3) by output (or industry).

GDP can also be calculated in nominal (current dollar) and real (chained dollar) amounts. Real GDP removes the effects of price level changes (i.e. inflation) and reports only the value of quantities consumed and produced in an economy. GDP by income is calculated in only nominal terms. This is because the components of income-based GDP cannot be separated into price and quantity terms. GDP by expenditure is calculated in both nominal and real terms. Finally, GDP by output is calculated in real terms. GDP at the CMA level is calculated by output or industry, commonly referred to as Real GDP by Industry at Basic Prices. It measures the value of a producer's output in an economy and includes subsidies but removes indirect taxes (except sales taxes).

The City obtains its Real GDP by Industry at Basic Prices from the Conference Board of Canada. It is calculated using a weighted share of employment in both the CMA and the province, and provincial GDP is estimated by summing all the industrial GDP values. Note that inflationary effects are removed from these calculations. GDP growth rates are expressed as the percentage change in the value of output from one year to the next.

Figure 7: Saskatoon CMA Real GDP Growth (% change), 2012 – 2025 (f)



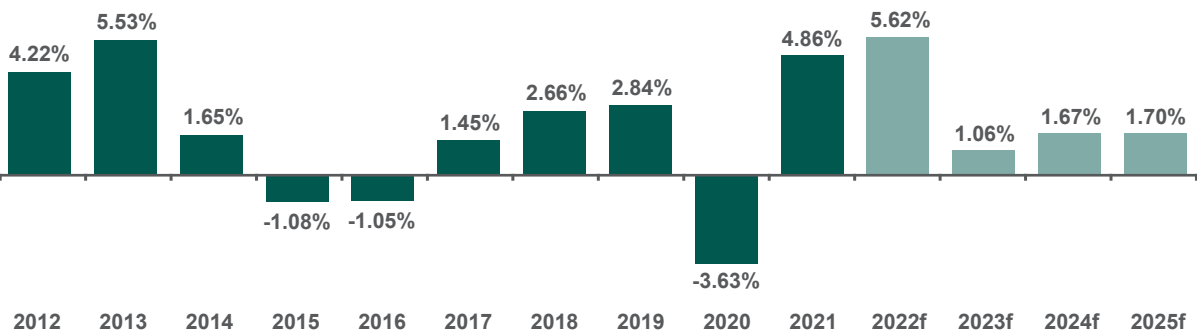
Source: Conference Board of Canada, July 2022

KEY INDICATORS

Employment & Unemployment

Economies that have higher employment levels and positive employment growth mean higher levels of consumption and investment; however, this is dependent on the nature and type of employment (i.e. industry and occupation and full-time or part-time). Consumption is driven by income, so the more people employed and earning will mean greater demand for goods and services, including housing. Total employment is the sum of employment in all industries. The data is presented in units of thousands and the value in annual percentage growth. Labour force statistics are commonly reported by the unemployment rate. The unemployment rate is simply the ratio of the number of unemployed workers to the total labour force. Generally, a low unemployment rate means that the economy is at or near capacity.

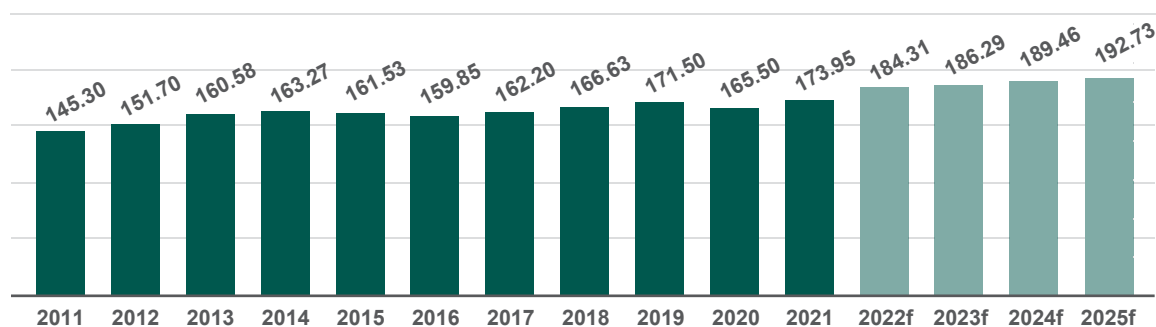
Figure 8: Saskatoon Total Employment Growth (% Growth), 2012 – 2025(f)



Source: Conference Board of Canada, July 2022

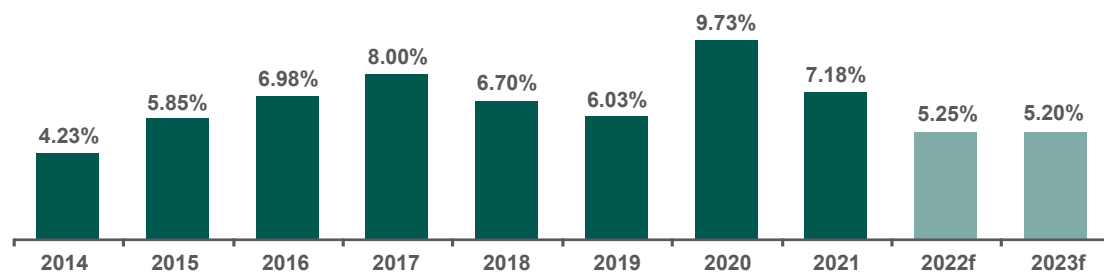


Figure 9: Saskatoon Total Employment (Thousands 000s), 2011 – 2025(f)




Source: Conference Board of Canada, July 2022

Figure 10: Saskatoon Unemployment Rate, 2014 – 2023(f)



Source: Conference Board of Canada, July 2022





*The City's estimated population
of Saskatoon is 285,049 as of
July 1, 2022.*

Photo credit: Tourism Saskatoon/CONCEPTS Photography



RESIDENTIAL INDICATORS

RESIDENTIAL INDICATORS

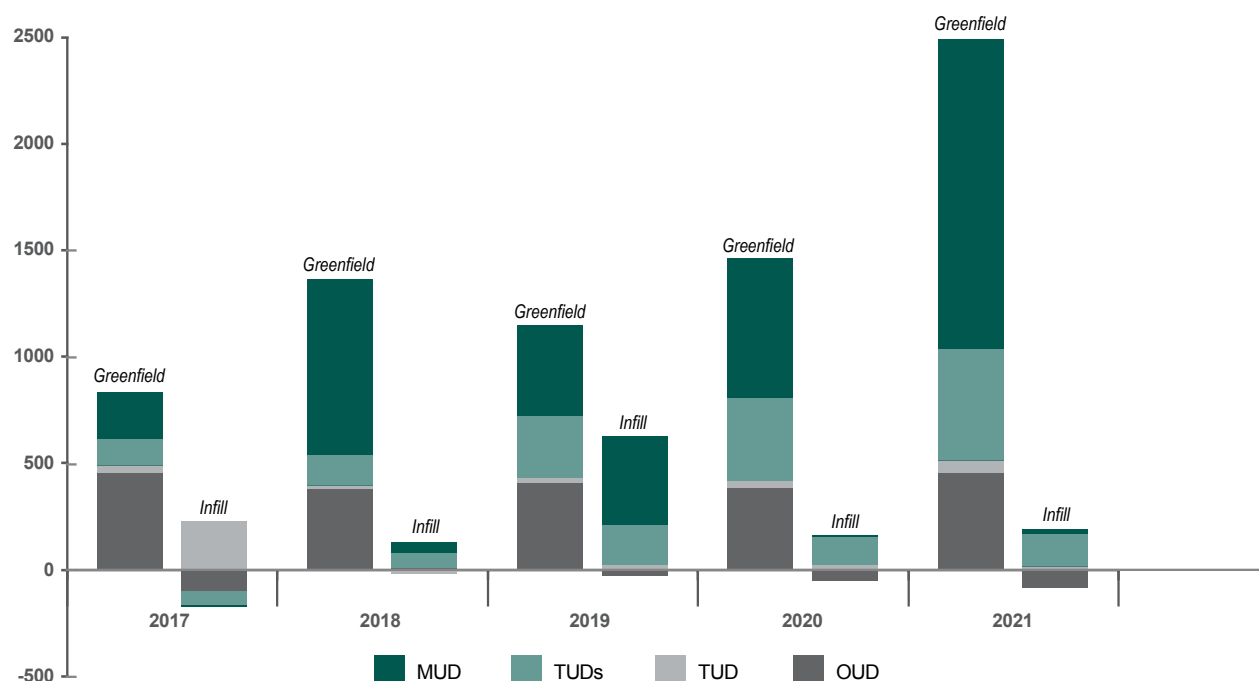
Residential development is typically characterized by dwelling type and general location. Greenfield development refers to development happening on the periphery of the city in areas that previously did not have urban development. Infill development refers to new development in built-up areas of the city.

Residential development is broken down into four basic categories of dwelling types:

- MUD – Multiple-unit Dwelling - one building with three or more units;
- TUD – Two-unit Dwelling - one building containing two units; and
- OUD – One-unit Dwelling - includes single-family detached homes and mobile homes.

Figure 11 shows the net change in the number of residential dwelling units. Typically, the annual number of residential dwelling types has increased, but in some cases, a decrease in the number of infill units is shown. This is due to both the demolition of existing units and administrative reasons, such as the re-classification of dwellings to reflect the removal of illegal suites or the conversion of private apartments to assisted living beds.

Figure 11: Annual Residential Development by Dwelling Type, 2017 – 2021



Source: Mapping & Research - City of Saskatoon

With this additional new development, Saskatoon's total dwelling unit count hit 118,788 total units in 2021, split between one-unit dwellings, (49.87%), two-unit dwellings (10.49%), and multiple-unit dwellings (39.64%).

Table 3: Total Dwelling Units, 2020-2021

	OUD	TUD	MUD	Total
2020	58,915	11,724	45,478	116,117
%	50.70%	10.10%	39.20%	100%
2021	59,281	12,472	47,125	118,788
%	49.87%	10.49%	39.64%	100%

Source: Mapping & Research - City of Saskatoon

New Residential Sales Prices & Housing Starts

The average sales price of new development has been consistently more expensive in infill than in greenfield neighbourhoods over the past four years. This may be due to a wider variety of new development being offered in greenfield neighbourhoods and/or increased demand for infill over that period.

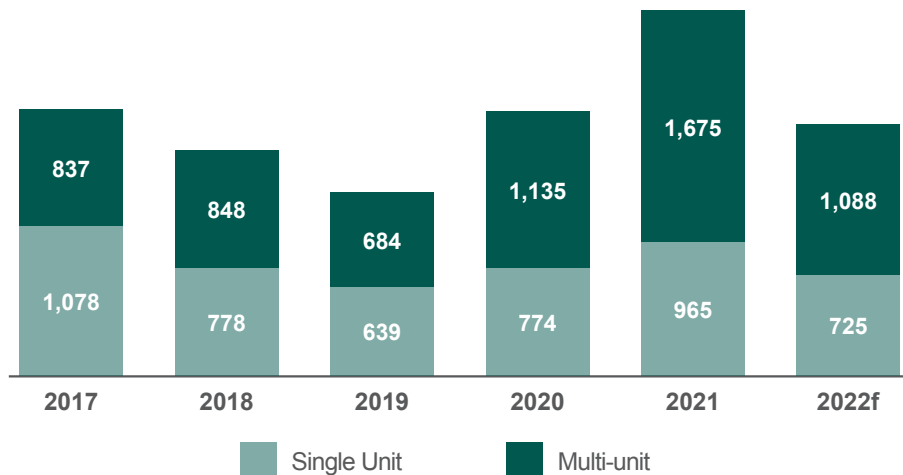
Table 4: Average Real Estate Sales Price for New Residential Units (built and sold between 2019 – 2021)

	Greenfield		Infill	
	Count	Average Price	Count	Average Price
Semi-Detached	30	\$348,198	2	\$261,153
Single Family	186	\$500,500	30	\$555,743
Condo Lowrise	18	\$312,854	2	\$101,767
Condo Highrise	0	\$—	16	\$427,173
Townhouse	0	\$—	0	\$83,000
Condo Bareland	32	\$428,767	0	\$—

Source: Corporate Financial Services - City of Saskatoon

Housing starts is an economic indicator that reflects the number of privately owned new houses on which construction has been started in each period. This data is divided into two types: single-unit and multi-unit buildings. The Conference Board of Canada maintains an expectation that housing starts will decrease over the short-term across most metropolitan areas in Canada. The housing starts expectation is upward for Saskatoon in the short-term and long-term, as of July 2022.

Figure 12: Saskatoon CMA Housing Starts, 2017 – 2022 (f)

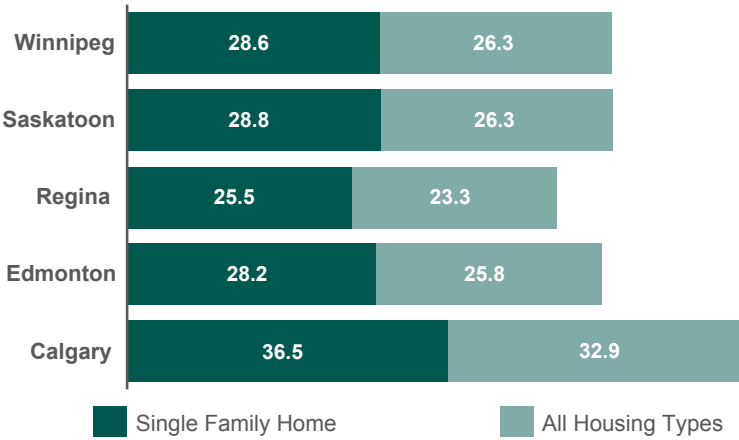


Source: Conference Board of Canada, July 2022

Housing Affordability

Royal Bank of Canada describes the Affordability Measure as the percentage of a typical household's pre-tax income used towards mortgage expenses (mortgage, taxes, and utilities). The higher the percentage, the less affordable the home becomes. Canada Mortgage and Housing Corporation (CMHC) indicates that no more than 32% of gross income should go towards mortgage expenses. In 2021, this measure characterized the Saskatoon market as more affordable than Calgary and Edmonton, but less affordable than Regina and Winnipeg for both single-family homes and a composite of all housing types. Calgary rated as the least affordable.

Figure 13: Housing Affordability Measure by City and Type, 2021

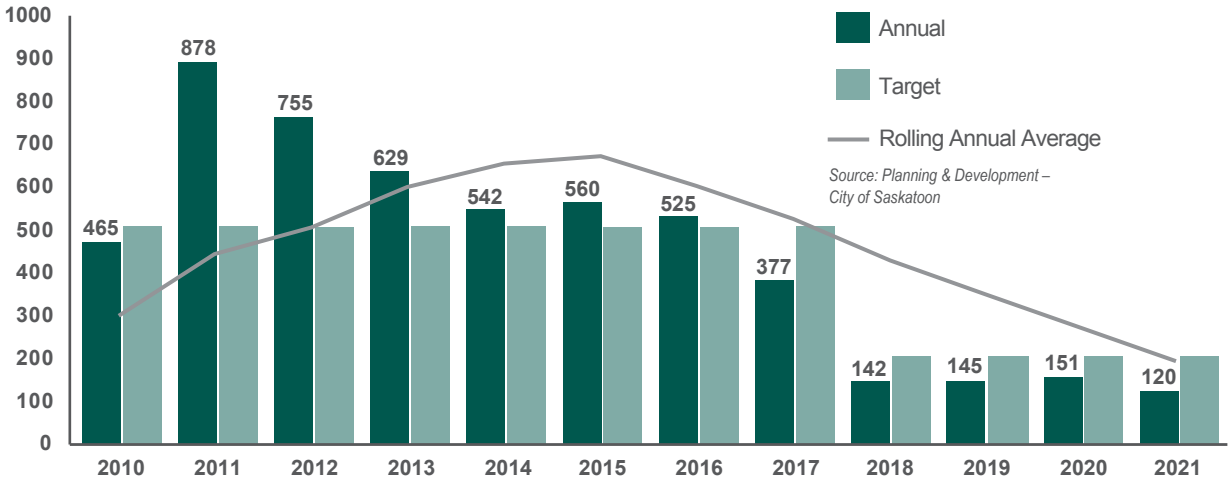


Source: Statistics Canada, Royal LePage, and RBC Economics Research

The City has made significant efforts to encourage and support the provision of attainable housing through a wide range of programs that target home ownership and rental opportunities.

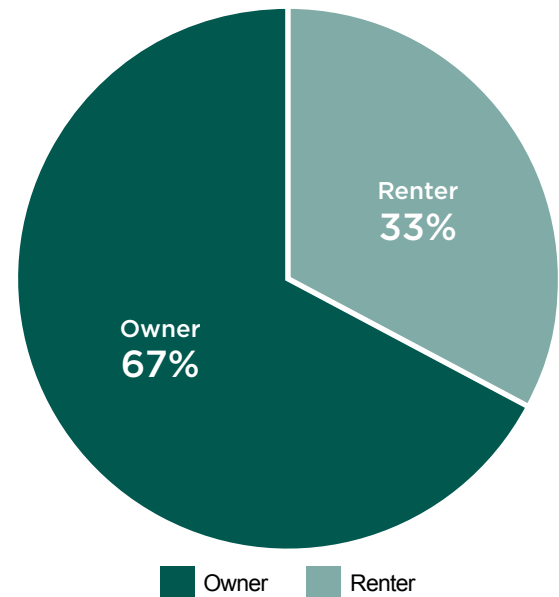
The City did not reach the target 200 units in 2021 due to decreased demand for affordable ownership housing and entry level ownership projects. Affordable rental demand remained strong, with the City maximizing their budget and contributing to 49 rental units with others being put on a waiting list for 2022. The purpose-built rental market vacancy rate dropped from 5.9% in 2020 to 4.8% in 2021. Affordable housing providers are continuing to see increased demand for affordable housing as those with lower fixed incomes will continue to be priced out of the market and be at the highest risk of homelessness.

Figure 14: New Attainable Housing Units, 2010 - 2021



Source: Planning & Development – City of Saskatoon

Figure 15: Total Private Households by Tenure



Source: 2016 Census

Rental Housing

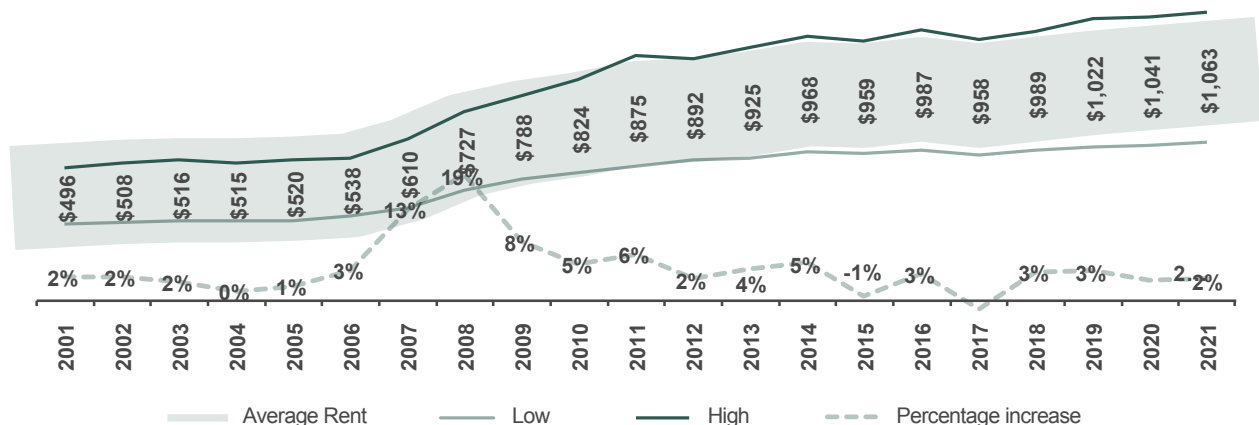
Rental housing is an important part of the housing market in a city. Many people prefer or require rental housing. According to CMHC, the average rent in the Saskatoon CMA increased by 2.1% from 2020 to 2021. The average rent increased by an average of 2.64% over the past ten years. CMHC has predicted continued downward pressure on the average rental price due to steady vacancy rates, but this has yet to be seen.

Table 5: Rental Housing Vacancy Rates

	2016	2017	2018	2019	2020	2021
Annual Vacancy Rate (%)	10.30%	9.60%	8.30%	5.70%	5.90%	4.80%
10 Year Average Actual (%)	2.80%	3.51%	4.41%	5.05%	5.76%	5.70%
Date Range	2007-2016	2008-2017	2009-2018	2010-2019	2011-2020	2012-2022
10 Year Average Target (%)	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%

Source: CMHC Rental Market Report Saskatoon CMA

Figure 16: Saskatoon CMA Average Rent & Annual Increase (%), 2001 - 2021

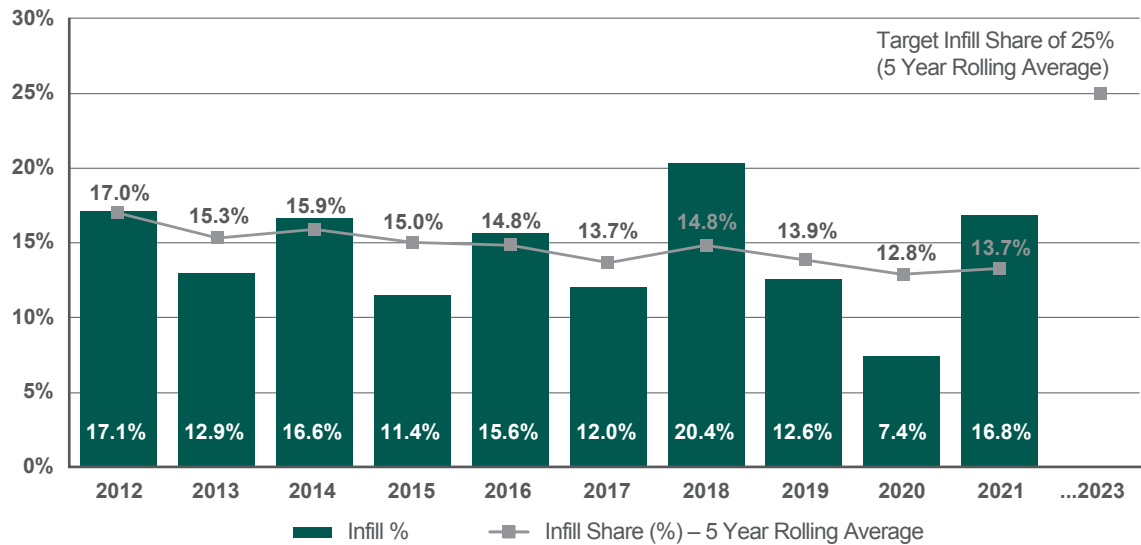


Source: Table 027-0040 - Canada Mortgage and Housing Corporation, average rents for areas with a population of 10,000 and over, annual (dollars), CANSIM (database).

Residential Infill Development

Alongside the targets laid out in the Plan for Growth, the City has set a goal of at least 25% of residential development occurring in infill neighbourhoods (as identified in Figure 18) each year, based on a five-year rolling average, by 2023. Infill neighbourhoods are shown in Figure 17. This target was set as a medium-term target along the way to achieving the City's long-term goal of accommodating 50% of long-term growth as infill. Tracking this helps gauge if this goal is being achieved and can help guide infill-focused programs and policy. In 2021, the five-year rolling average was 13.7%.

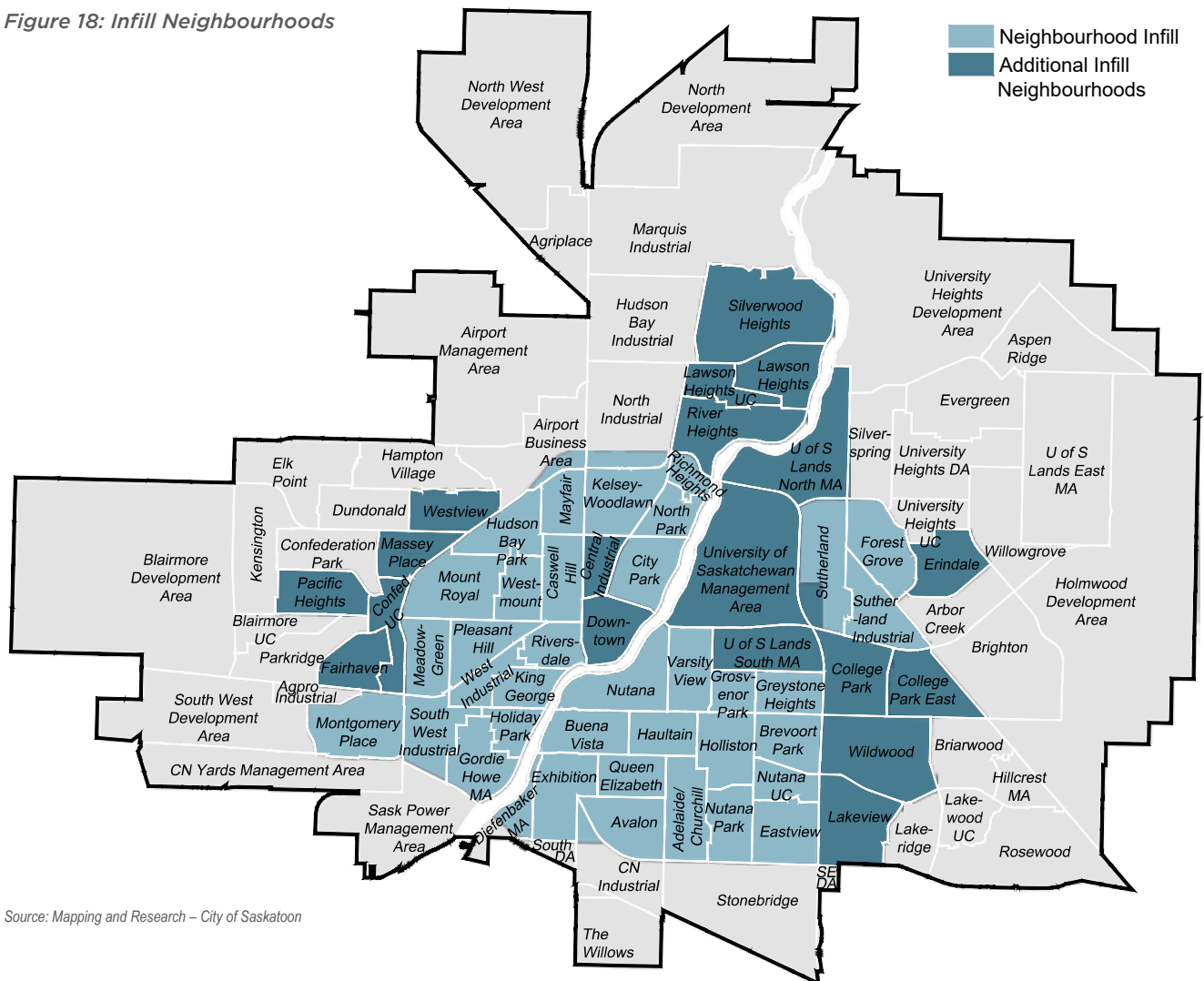
Figure 17: Residential Infill Development (percentage of total new dwellings city-wide, 2012 – 2021)



Source: Building Standards – City of Saskatoon



Figure 18: Infill Neighbourhoods



Tracking the value of building permits and the inventory of vacant land in infill neighbourhoods helps identify the impact that infill development has and what future infill opportunities may exist. Over the last five years, the value of infill development has ranged from 31% to 52% of the total value of development occurring in Saskatoon. In 2021, the value of residential infill development was \$143.7 million, or 36% of the total dollar value for residential development in Saskatoon.

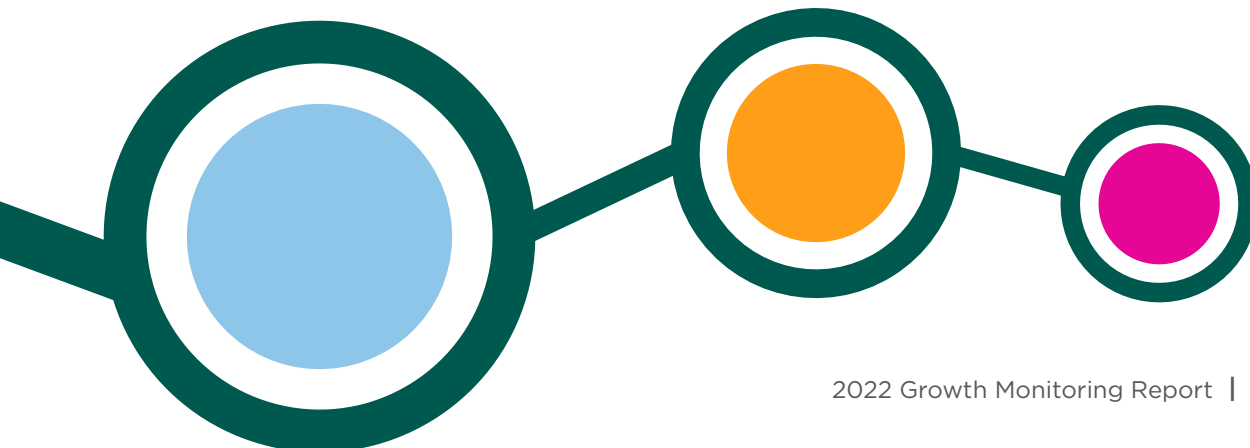




Table 6: Building Permit Value in Infill Neighbourhoods

	Building Permit Values Infill & Citywide (\$000s)					
	2016	2017	2018	2019	2020	2021
Residential - Citywide	344,606	439,282	294,763	281,960	384,372	400,000
Non-Residential - Citywide	376,833	295,076	341,171	359,978	154,920	210,000
Total - Citywide	721,439	734,358	635,934	641,938	539,292	610,000
Residential - Infill	77,484	99,196	83,830	84,485	92,526	143,718
% of Total	22%	23%	28%	30%	24%	36%
Non-Residential - Infill	148,179	184,217	222,646	250,375	92,642	112,442
% of Total	39%	62%	65%	70%	60%	54%
Total - Infill	225,663	283,413	306,476	334,860	185,168	256,160
% of Total	31%	39%	48%	52%	34%	42%

Source: Building Standards - City of Saskatoon

There are currently 561 vacant sites within Saskatoon's Infill Neighbourhoods, with a total site area of 354 hectares. This represents 34.8% of all vacant sites in Saskatoon and 5.1% of total vacant site area in Saskatoon; and therefore indicates a significant opportunity for infill development. In addition to these vacant sites, many other sites could be considered potential infill sites because the buildings on them have reached their usable lifespan, or the sites are used for less than their full development potential. Note that sites with active permits have been removed from the 2022 totals.

Table 7: Vacant Land Inventory - Infill Neighbourhoods

	Sites	% of City-Wide Total	Site Area (ha)	% of City-Wide Total
2022	561	34.8%	354	5.1%
2021	511	34.5%	340	5.0%
2020	602	26.2%	378	5.2%

Source: SITE Database - City of Saskatoon, July 2022

Figure 19: Percentage of Private Dwellings built in the last 25 years



RESIDENTIAL INDICATORS

Table 8: Housing Supply by Development Era (# of units)

Development Era	1960 or before	1961 to 1980	1981 to 1990	1991 to 2016	Average - % built in last 25 years
Downtown	440	720	320	250	14.5%
Developed Suburban	1,405	17,740	12,070	10,410	26.3%
Industrial	300	130	15	35	8.5%
New Suburban	20	45	80	12,835	99.4%
Original	6,840	3,675	1,325	1,845	13.3%
Original Suburban	9,060	9,760	1,240	2,065	9.5%
Urban Centre	240	805	850	3,890	68.7%
City of Saskatoon	18,305	32,875	15,900	31,330	30.9%

Source: Census 2016



COMMERCIAL INDICATORS



COMMERCIAL INDICATORS

Business Licenses

The total number of businesses and their location gives an indication of the amount of commercial activity and development in Saskatoon. Businesses in Saskatoon tend to be in the City Centre (which includes the Downtown and portions of Nutana, Riversdale, City Park, and the portion of College Drive that interface with the University of Saskatchewan), and the industrial areas of the city's north end (which include the Airport Business Area, Marquis Industrial, Hudson Bay Industrial, and the North Industrial area) and at Urban Centres. Growth in business licenses issued remained steady in 2021 suggesting that confidence remains positive in the Saskatoon market. An increase was noted in the commercial/industrial businesses in the City in 2021.

Figure 20: New Business Licenses Issued, 2014 - 2021

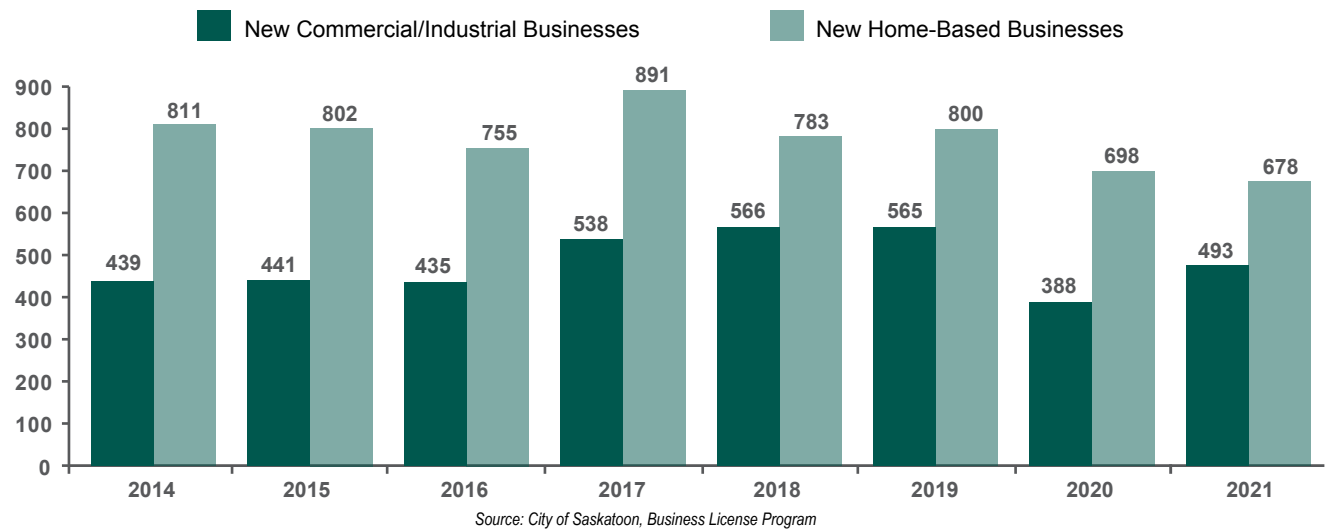
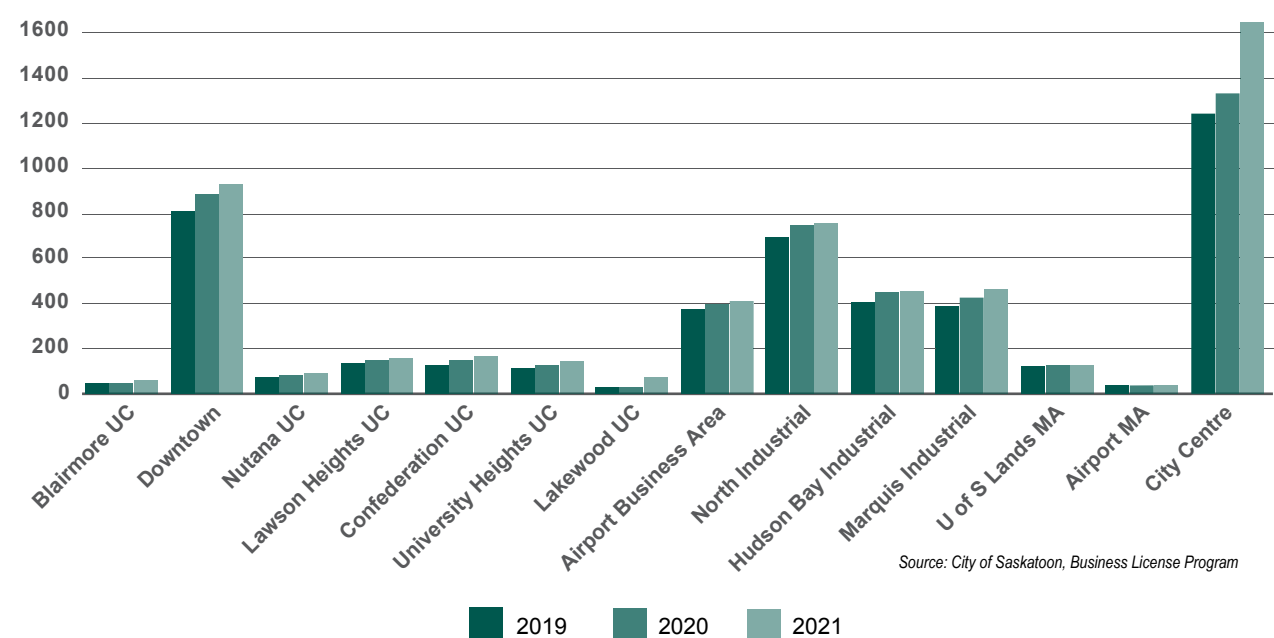


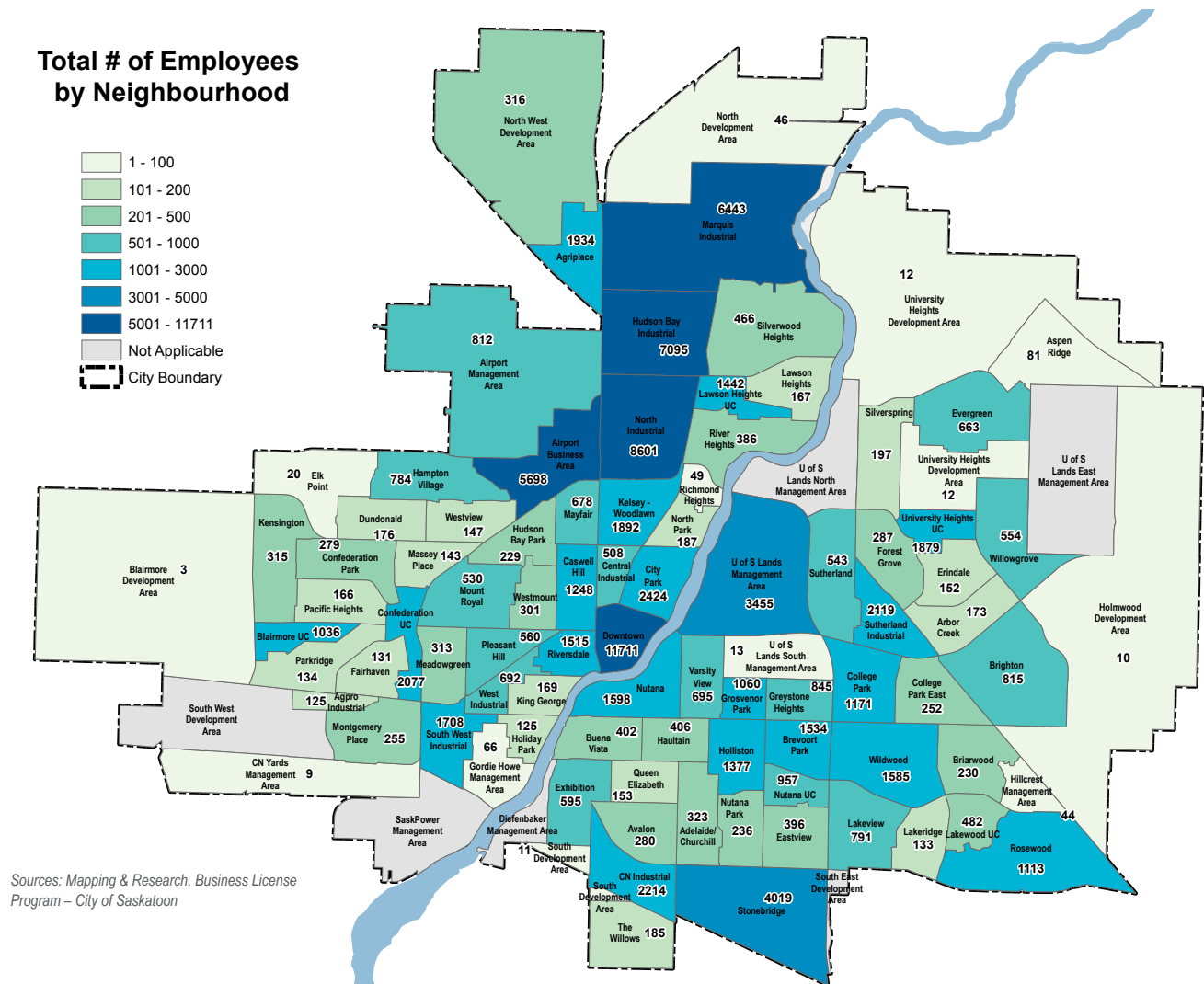
Figure 21: Licensed Commercial Businesses by Area, 2019 - 2021



Employment Locations

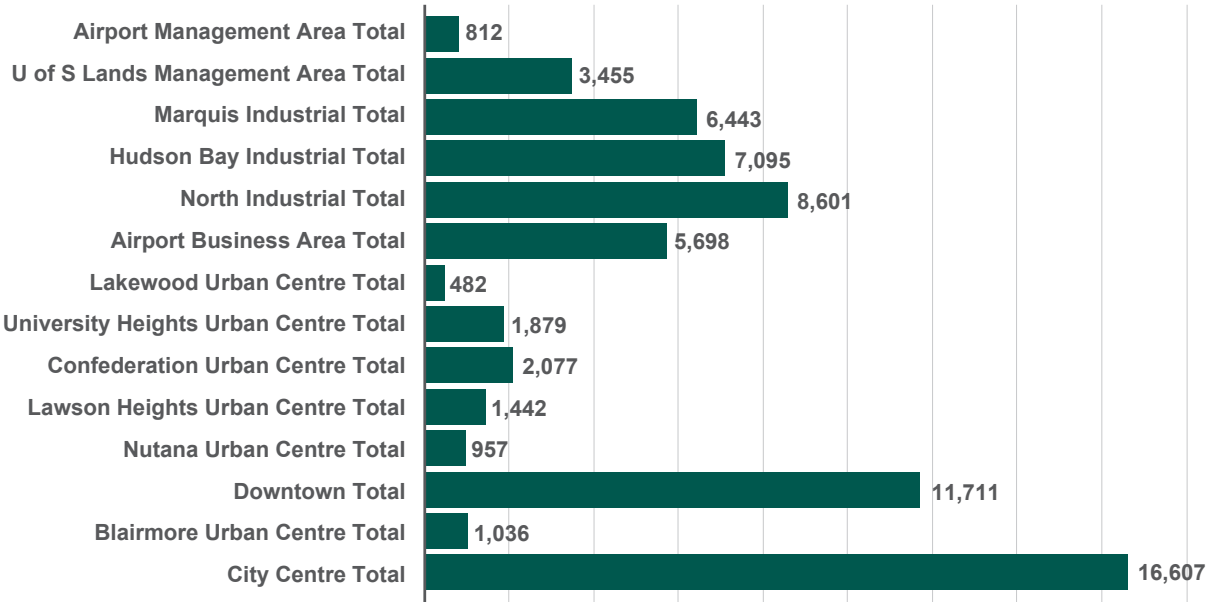
The number and location of employees closely follow the number and location of business licenses, with employees similarly concentrated in the City Centre and the industrial areas of the city's north end. Beyond these areas, jobs tend to be clustered around Urban Centres or along major transportation corridors throughout the city, with each of these being an employment and amenity hub for the surrounding neighbourhoods.

Figure 22: Total Number of Employees by Neighbourhood



COMMERCIAL INDICATORS

Figure 23: Major Employment Centres, Total Employees, 2021



Source: Business Licence Program, City of Saskatoon





**DEMAND
PROFILE**



DEMAND PROFILE

Residential Land Demand

Demand for residential land is estimated based on assumptions of population growth, household size, and density of development. Estimates of total population growth are divided by the average household size to determine the number of housing units. Estimating the amount of land required to develop these units requires assumptions about the type of housing that will be required. Based on population growth scenarios, and average household size, it is possible to estimate how many dwelling units may be required to meet a given population increase.

Table 9 indicates the population increase, based on various growth scenarios determined from the City's July 1, 2022 population estimate of 285,049. It also demonstrates the dwelling unit demand, specifically the number of dwelling units needed to accommodate the population growth at each growth rate scenario. The number of dwelling units for each growth rate scenario is calculated by dividing the number of persons added by the average household size, which is 2.50 persons per dwelling unit in Saskatoon.

The 2022 projected population growth rate for Saskatoon was estimated to be 1.0%. At that rate, over 1,140 dwelling units per year would be required to accommodate the expected population growth.

Table 9: Growth Rate Scenarios, Population Growth, Dwelling Unit Demand

Growth Rate	2023		2024		2025		TOTAL	
	Population Growth (persons)	Dwelling Unit Demand (dwellings)	Population Growth (persons)	Dwelling Unit Demand (dwellings)	Population Growth (persons)	Dwelling Unit Demand (dwellings)	Population Growth (persons)	Dwelling Unit Demand (dwellings)
0.50%	1,425	570	1,432	573	1,440	576	4,297	1,719
1.00%	2,850	1,140	2,879	1,152	2,908	1,163	8,637	3,455
1.50%	4,276	1,710	4,340	1,736	4,405	1,762	13,021	5,208
2.00%	5,701	2,280	5,815	2,326	5,931	2,373	17,447	6,979

Source: Mapping and Research – City of Saskatoon

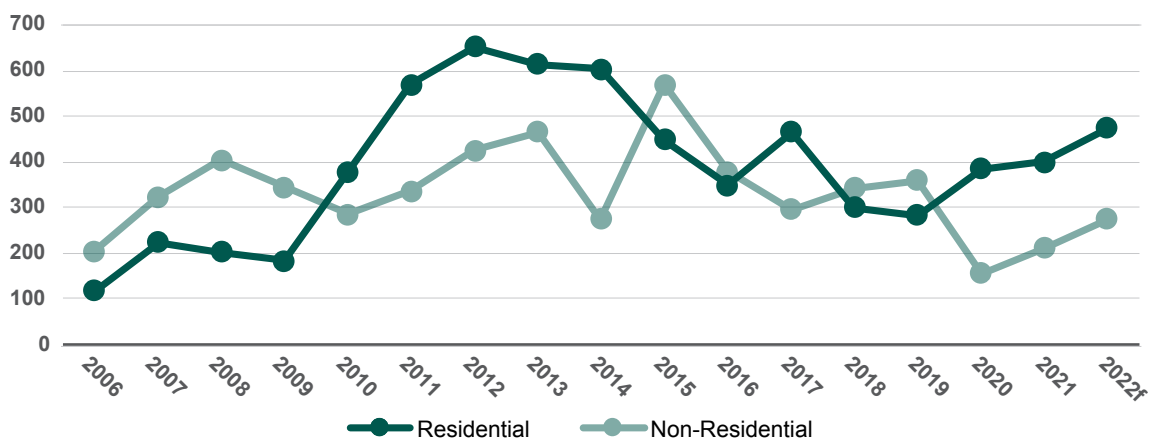


Non-Residential Land Demand

Non-residential development does not follow the same growth pattern as residential development. GDP growth drives employment, labour force, and income trends and results in demand for both development of industrial and commercial facilities.


Commercial and industrial development in Saskatoon also services the surrounding area, so household growth in the CMA, and within an approximate 100-kilometre surrounding area, will influence the demand for commercial and industrial land in Saskatoon. Data from the City's Building Standards Department indicates that in 2021, building permit values for both residential and non-residential permits were \$610 million. Based on the construction activity in the first two quarters of 2022, building permit values for residential are projected at \$475 million and non-residential are projected to be at \$275 million.

Figure 24: Building Permit Values (\$000s), 2006 - 2022(f)



Source: Building Standards – City of Saskatoon





The 2022 projected population growth rate for Saskatoon was estimated to be 1.0%. At that rate, over 1,140 dwelling units per year would be required to accommodate the expected population growth.

LAND INVENTORY



LAND INVENTORY

Residential Inventory

In 2022, major land developers are projected to hold 453 vacant one-unit dwelling lots, and home builders are projected to hold 2,491 vacant one-unit dwelling lots, for a total of 2,944 vacant one-unit dwelling lots (see Table 10).

Table 11 identifies the inventory of vacant multiple unit dwelling land held by builders and developers. For 2022, 277.94 acres of vacant land zoned for multiple-unit dwellings are projected to be serviced, which can accommodate up to 6,702 multiple-unit dwelling units.

Council has set a target of maintaining a minimum one-year supply of one-unit dwelling lots, and a two-year supply of multiple-unit dwelling land. These targets are based on historical building permits, projected population growth and projected demand for one-unit and multiple-unit dwellings in the upcoming year.

Based on current inventory levels, these targets have been met or exceeded. The current inventory has the potential to accommodate a total of 9,646 dwelling units or an additional 22,423 people.

Table 10: Builder and Developer One-Unit Dwelling Lot Inventory, Projected for December 31, 2022

Neighbourhood	Number of Vacant One-Unit Dwelling Lots held by Builders	Number of One-Unit Dwelling Lots held by Major Land Developers	Total Inventory of One-Unit Dwelling Lots
Agpro Industrial	1	0	1
Arbor Creek	1	0	1
Aspen Ridge	431	69	500
Avalon	1	0	1
Briarwood	4	0	4
Brighton	1,081	14	1,095
Buena Vista	9	0	9
Caswell Hill	14	0	14
City Park	3	0	3
College Park	1	0	1
Dundonald	4	0	4
Elk Point	2	0	2
Evergreen	14	13	27
Exhibition	1	0	1
Fairhaven	1	0	1
Hampton Village	3	0	3
Haultain	5	0	5
Holiday Park	9	0	9
Holliston	2	0	2
Hudson Bay Park	2	0	2
Kensington	219	178	397
King George	10	0	10
Lakeridge	3	0	3

Table 10 continued on page 41.

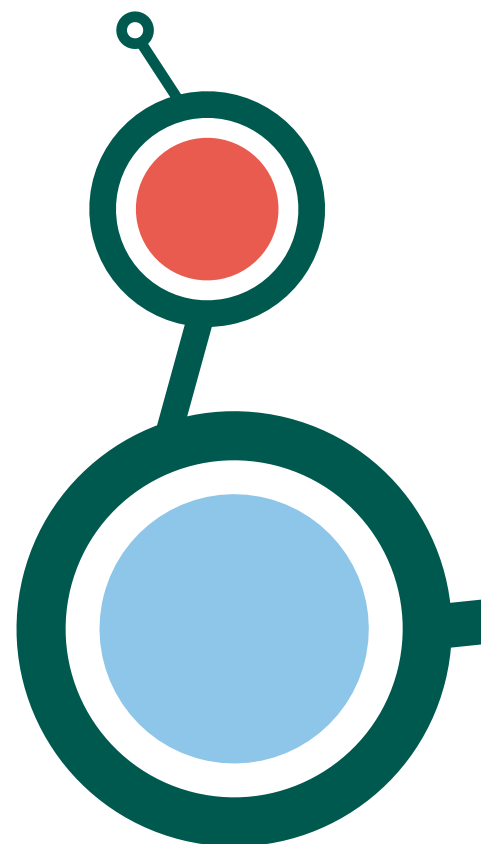


Table 10: Builder and Developer One-Unit Dwelling Lot Inventory, Projected for December 31, 2022

Continued from page 40.

Neighbourhood	Number of Vacant One-Unit Dwelling Lots held by Builders	Number of One-Unit Dwelling Lots held by Major Land Developers	Total Inventory of One-Unit Dwelling Lots
Massey Place	4	0	4
Mayfair	9	0	9
Meadowgreen	3	0	3
Montgomery Place	4	0	4
Mount Royal	4	0	4
North Park	7	0	7
Nutana	9	0	9
Nutana Park	1	0	1
Parkridge	122	107	229
Pleasant Hill	38	0	38
Queen Elizabeth	4	0	4
Riversdale	14	0	14
Rosewood	324	70	394
Stonebridge	94	0	94
Sutherland	10	0	10
University Heights DA	2	0	2
Varsity View	8	0	8
Westmount	10	0	10
Westview	2	0	2
Willowgrove	1	2	3
Total	2,491	453	2,944

Source: Mapping & Research, City of Saskatoon, and 2022 City of Saskatoon Developer Survey



LAND INVENTORY

Table 11: Builder and Developer Multiple-Unit Dwelling Inventory, Projected for December 31, 2022

Neighbourhood	Builders Vacant Multi-Unit Land (acres)	Developer Vacant Multi-Unit Land (acres)	Total Vacant Multi Unit Land (acres)	Potential Dwelling Units Held by Builders	Potential Dwelling Units held by Developers	Total Potential Dwelling Units
Aspen Ridge	50.76	23.02	73.78	1405	675	2,080
Brighton	35.97	1.08	37.05	632	17	649
Caswell Hill	0.11	0	0.11	5	0	5
City Park	0.68	0	0.68	62	0	62
College Park	0.13	0	0.13	5	0	5
Dundonald	1.62	0	1.62	25	0	25
Evergreen	51.74	9.21	60.95	1215	158	1,373
Forest Grove	0.22	0	0.22	6	0	6
Haultain	0.27	0	0.27	11	0	11
Holliston	1.9	0	1.9	70	0	70
Kensington	20.29	16.38	36.67	441	425	866
Meadowgreen	0.19	0	0.19	7	0	7
Mount Royal	0.7	0	0.7	27	0	27
Nutana	0.49	0	0.49	18	0	18
Pleasant Hill	1.94	0	1.94	67	0	67
Riversdale	0.33	0	0.33	13	0	13
Rosewood	39.45	10.49	49.94	937	226	1,163
Stonebridge	1.82	0	1.82	28	0	28
Sutherland	6.98	0	6.98	141	0	141
West Industrial	0.14	0	0.14	4	0	4
Willowgrove	2.03	0	2.03	82	0	82
Total	217.76	60.18	277.94	5201	1501	6,702

Source: Mapping & Research, City of Saskatoon, and 2022 City of Saskatoon Developer Survey



Industrial Inventory

Industrial land is the least dependent on local demand. While industrial land is used extensively to service the local economy, demand for industrial services and land can be generated by regional, inter-provincial, and international demand. However, local labour force and community characteristics play an essential part in attracting non-local industrial capacity. Current inventories and historical absorption rates of industrial land area are essential baselines for guiding the development of additional industrial land.

Saskatoon Land has typically been the only major industrial land developer operating in Saskatoon. Their five-year average for industrial land sales and long-term leases is shown in Table 12. From 2017 to 2021, Saskatoon Land averaged 21.09 acres per year of industrial land sales and long-term leases.

Table 13 displays the vacant industrial land inventory in Saskatoon. There are a total of 698 acres of vacant industrially zoned sites.

Table 12: Five-year Average Industrial Land Sales/Lease, 2017 - 2021

Year	Acres (ac)
2017	12.12
2018	38.96
2019	9.76
2020	8.15
2021	36.46
Average	21.09

Source: Saskatoon Land Department, City of Saskatoon,
2021 Saskatoon Land Annual Report

Saskatoon Land's mandate includes providing an adequate supply of industrial land to the market at competitive market values. In addition to providing investment returns, Saskatoon Land's role in industrial development is to facilitate opportunities for economic development in the areas of business attraction and expansion. This is accomplished by having a suitable inventory of fully serviced shovel-ready sites that are available to potential new businesses considering a location in Saskatoon. Much of the current inventory held by Saskatoon Land can facilitate these employment-generating opportunities when they arise. The City's Industrial Land Incentive Program provides further benefits that are available for new or expanding businesses considering industrial sites.



LAND INVENTORY

Commercial Inventory

Table 14 displays the vacant commercial land inventory in Saskatoon. Currently, there are a total of 175.81 acres of vacant commercially zoned sites. This vacant commercial space has the potential to accommodate 7.65 million square feet of retail and/or office space.

Colliers International's (Colliers) Saskatoon Retail Market Report 2021 categorized the Saskatoon retail market as resilient in a post-pandemic environment. According to the analysis, despite the influence of shifting public health initiatives having an unpredictable impact on retailers, significant retail vacancy rates did not materialize in 2021. In the second half of 2021, the sector was noted to have shifted from crisis to stability and recovery.

Table 13: Industrial Land Inventory, Projected for December 31, 2022

Neighbourhood Name	Vacant Light Industrial Land (acres)	Vacant Heavy Industrial Land (acres)	Total Vacant Industrial Land (acres)
Agpro Industrial	11.68	0	11.68
Agriplace	34.7	0	34.70
Airport Business Area	19.49	5.16	24.65
Airport MA	0.53	0	0.53
Caswell Hill	0.66	0	0.66
Central Industrial	6.07	2.99	9.06
City Park	0.68	0	0.68
CN Industrial	26.54	0	26.54
Evergreen	2.99	0	2.99
Holiday Park	0.4	0	0.40
Hudson Bay Industrial	25.9	33.94	59.84
Kelsey - Woodlawn	9.16	0.17	9.33
Marquis Industrial	100.47	230.32	330.79
Mayfair	0.07	0	0.07
North DA	0	5	5.00
North Industrial	10.33	20.4	30.73
North West DA	0	14.56	14.56
Riversdale	0.35	0	0.35
Rosewood	23.09	0	23.09
South West Industrial	62.92	2.42	65.34
Stonebridge	0	5.47	5.47
Sutherland Industrial	5.44	10.68	16.12
West Industrial	7.21	18.32	25.53
Total	348.68	349.43	698.11

Source: Mapping & Research, City of Saskatoon, and 2022 City of Saskatoon Developer Survey

Table 14: Commercial Land Inventory, Projected for December 31, 2022

Neighbourhood	Vacant Commercial Land (acres)	Vacant Institutional Land (acres)	Vacant Mixed-Use Land (acres)	Total (acres)
Aspen Ridge	0	0	31.49	31.49
Blairmore UC	0	4.85	0	4.85
Brevoort Park	0.27	0	0	0.27
Brighton	7.9	0	0	7.9
Buena Vista	0	0.36	0	0.36
Caswell Hill	1.86	0.22	2.45	4.53
Central Industrial	0	2.83	1.21	4.04
City Park	0	1.23	0.08	1.31
CN Industrial	2	0	0	2
College Park	0	1.5	0	1.5
Downtown	19.28	3.02	2.78	25.08
Evergreen	0	1.56	11.01	12.57
Forest Grove	0	2.32	0	2.32
Haultain	0	0.4	0	0.4
Holliston	0	0.14	0	0.14
Hudson Bay Industrial	0.47	0	0	0.47
Holmwood Development Area	0.31	0	0	0.31
Hudson Bay Park	0.45	0	0	0.45
Kelsey - Woodlawn	1.11	0	0	1.11
Kensington	0	0.47	1.24	1.71
King George	0.33	0	0	0.33
Lakeview	0.21	0.2	0	0.41
Lawson Heights UC	0	1.39	0	1.39
Massey Place	0.45	0	0	0.45
Mayfair	0.82	0	0	0.82
Meadowgreen	0.29	0	0	0.29
Montgomery Place	0.5	0	0	0.5
Mount Royal	0.5	0	0	0.5
North Park	0.22	0	0	0.22
Nutana	0.16	0	0	0.16
Nutana Urban Centre	0	2.57	0	2.57
Pleasant Hill	2.52	0	0	2.52
Queen Elizabeth	0.41	0	0	0.41
Riversdale	9.31	0	0.5	9.81
Rosewood	41.45	0.58	0.23	42.26
Stonebridge	0	3.21	0	3.21

Table 14 continued on page 46.

LAND INVENTORY

Table 14: Commercial Land Inventory, Projected for December 31, 2022

Continued from page 45.

Neighbourhood	Vacant Commercial Land (acres)	Vacant Institutional Land (acres)	Vacant Mixed-Use Land (acres)	Total (acres)
Sutherland	0.12	0.52	0	0.64
U of S Lands MA	0.49	0	0	0.49
Varsity View	0.08	0.6	0	0.68
West Industrial	0	0	4.45	4.45
Westmount	0.89	0	0	0.89
Total	92.4	27.97	55.44	175.81

Source: Mapping & Research, City of Saskatoon, and 2022 City of Saskatoon Developer Survey

Market Absorption

Table 15 outlines projections for the full build-out of neighbourhoods currently under development based on building permit issuance. Figures 25 through 31 show where and when development permits were issued in each of the developing neighbourhoods. New neighbourhoods initiated in the early 2000's such as Hampton Village and Willowgrove experienced shortened build-out time frames of 7 to 8 years due to the robust growth rates during those times.

As population growth rates have moderated, new neighbourhood build-out time frames are anticipated to increase to up to a 20-year period, or longer depending on the size and density of each neighbourhood. Estimated full neighbourhood build-out is based on the building permits issued for each neighbourhood in past years, trends seen in other neighbourhoods, and the future three years of planned servicing for each neighbourhood. As growth rates and phasing can be variable from year to year, the build-out timeframe is an estimate that is currently tracked and monitored throughout the year.

Table 15: New Neighbourhood Buildouts, July 1, 2022

Neighbourhood	OOD (to date)	MUD (to date)	Total Est. OOD	Total Est. MUD	Buildout % OOD	Buildout % MUD	Overall Buildout %	% of City share of building permits from last 5 years	Est. Full Buildout Date
Aspen Ridge	758	56	2,195	3,629	35%	2%	14%	10%	2032
Brighton	1,029	574	2,942	3,700	35%	16%	24%	21%	2030
Evergreen	2,206	2,200	2,180	4,026	101%	55%	71%	16%	2025
Kensington	1,267	326	1,701	1,714	74%	19%	47%	11%	2028
Rosewood	2,175	914	2,722	3,322	80%	28%	51%	16%	2031
The Willows	126	240	481	530	26%	45%	36%	1%	2028

Source: Building Standards – City of Saskatoon

Figure 25: Aspen Ridge Development Permits

Source: Mapping & Research, City of Saskatoon

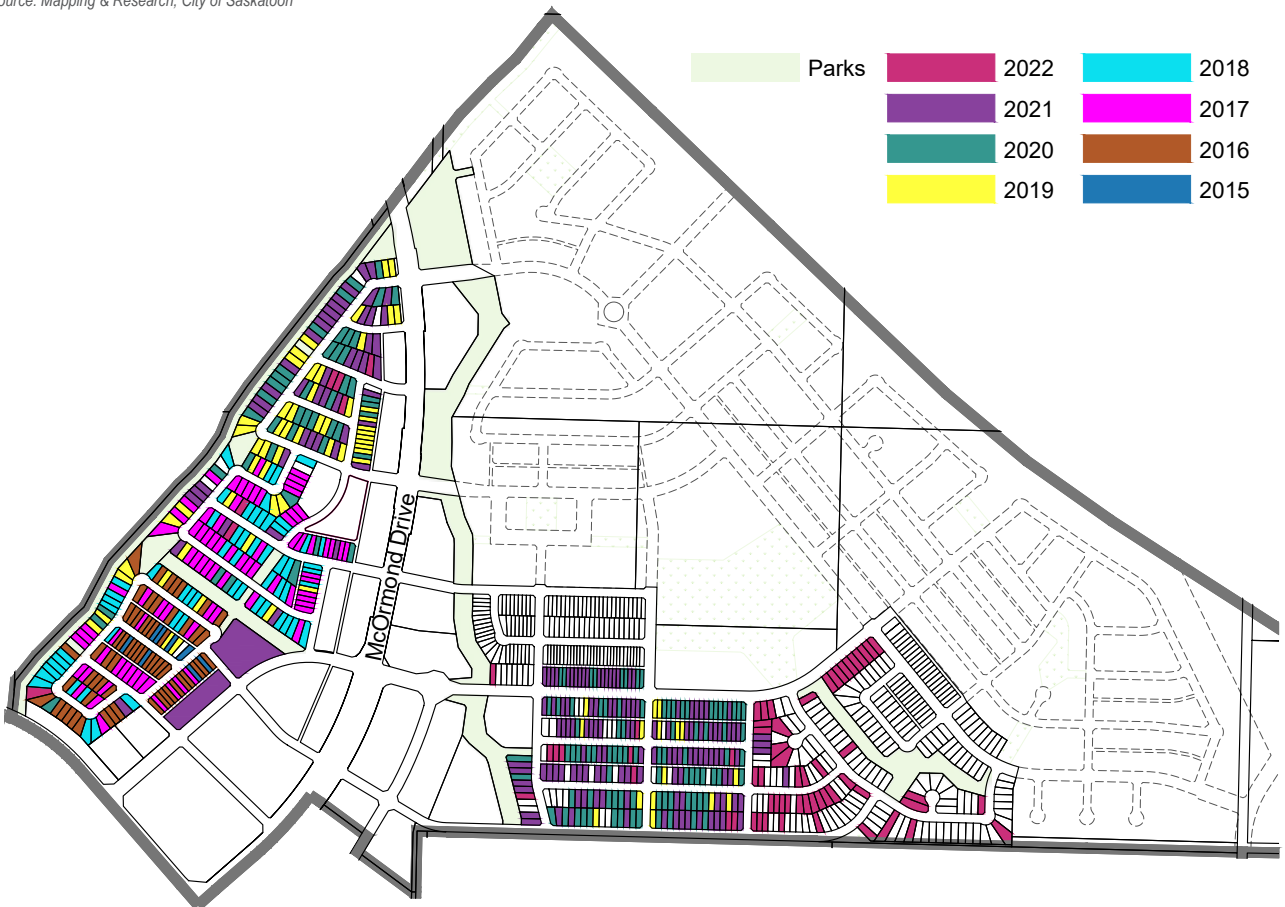


Figure 26: Brighton Development Permits

Source: Mapping & Research, City of Saskatoon

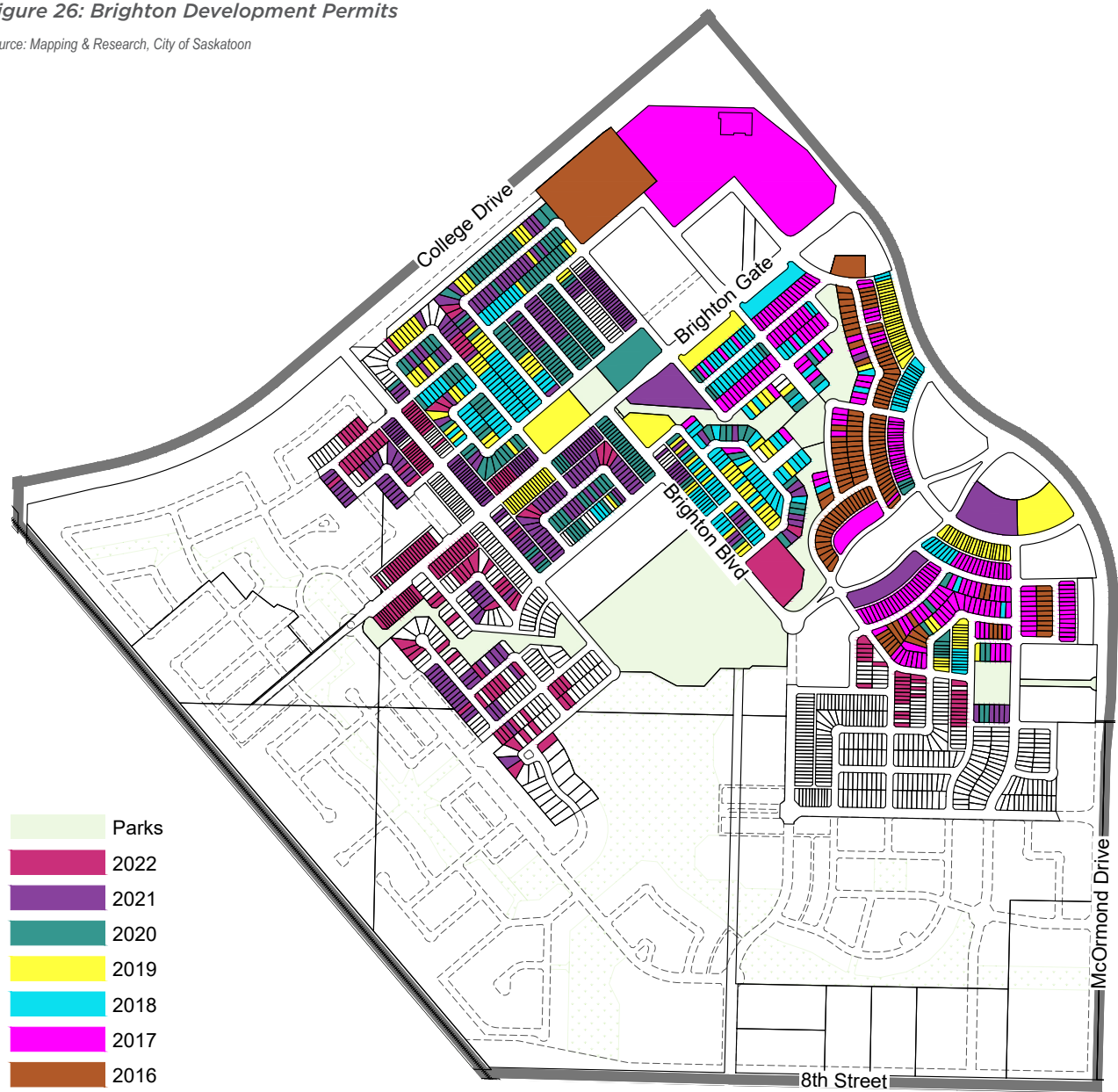


Figure 27: Evergreen Development Permits

Source: Mapping & Research, City of Saskatoon

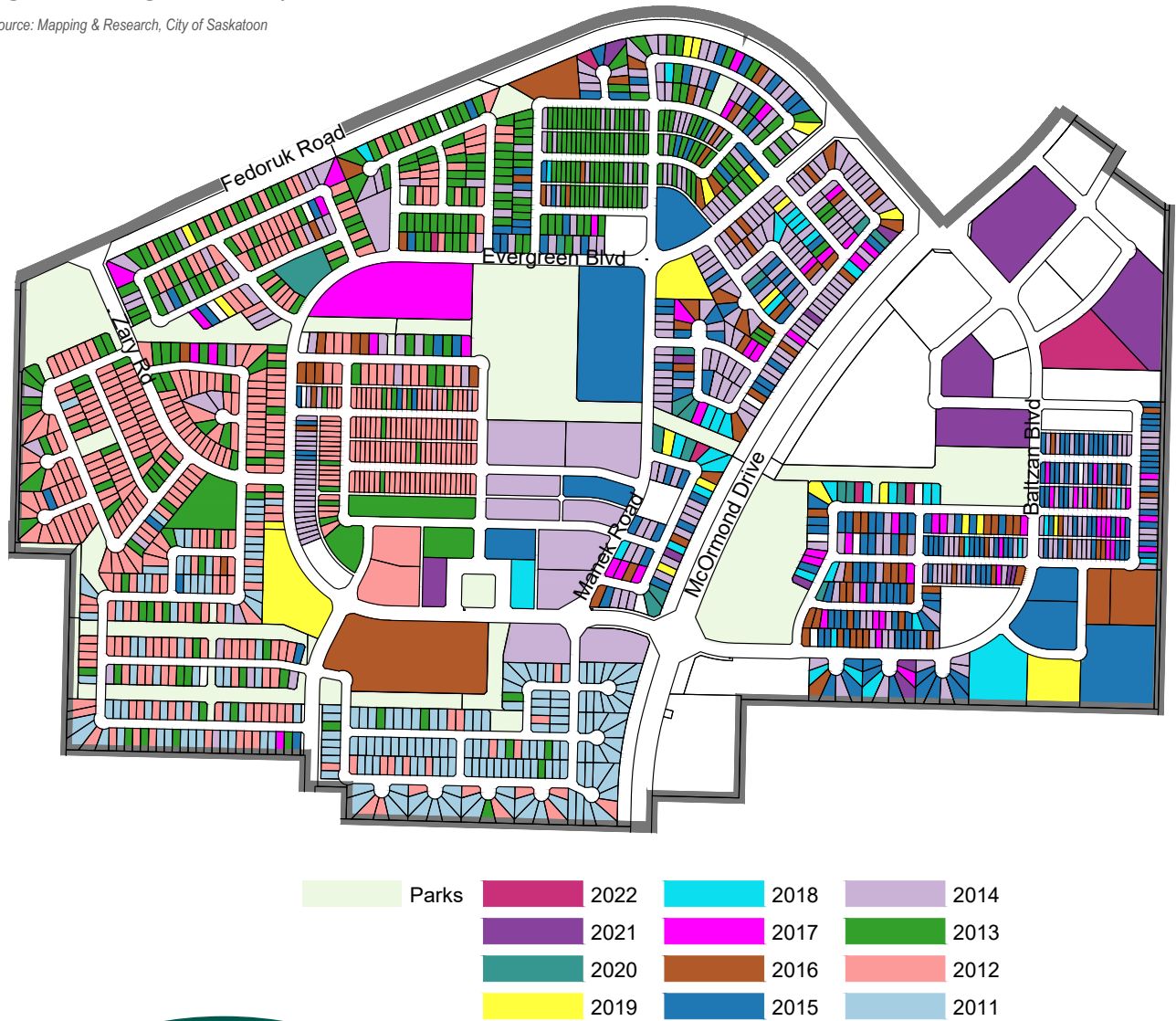


Figure 28: Kensington Development Permits)

Source: Mapping & Research, City of Saskatoon

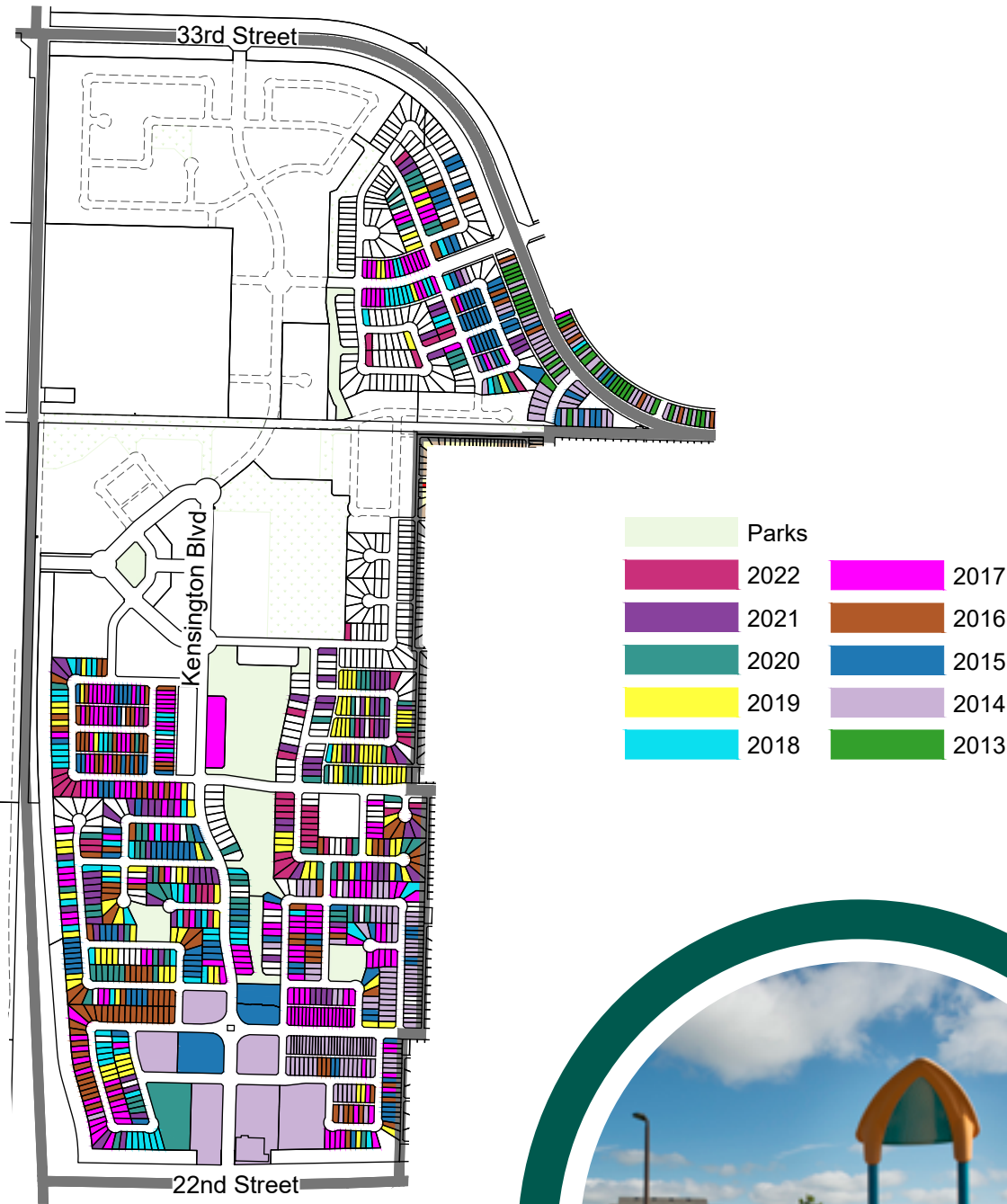


Figure 29: Rosewood Development Permits

Source: Mapping & Research, City of Saskatoon

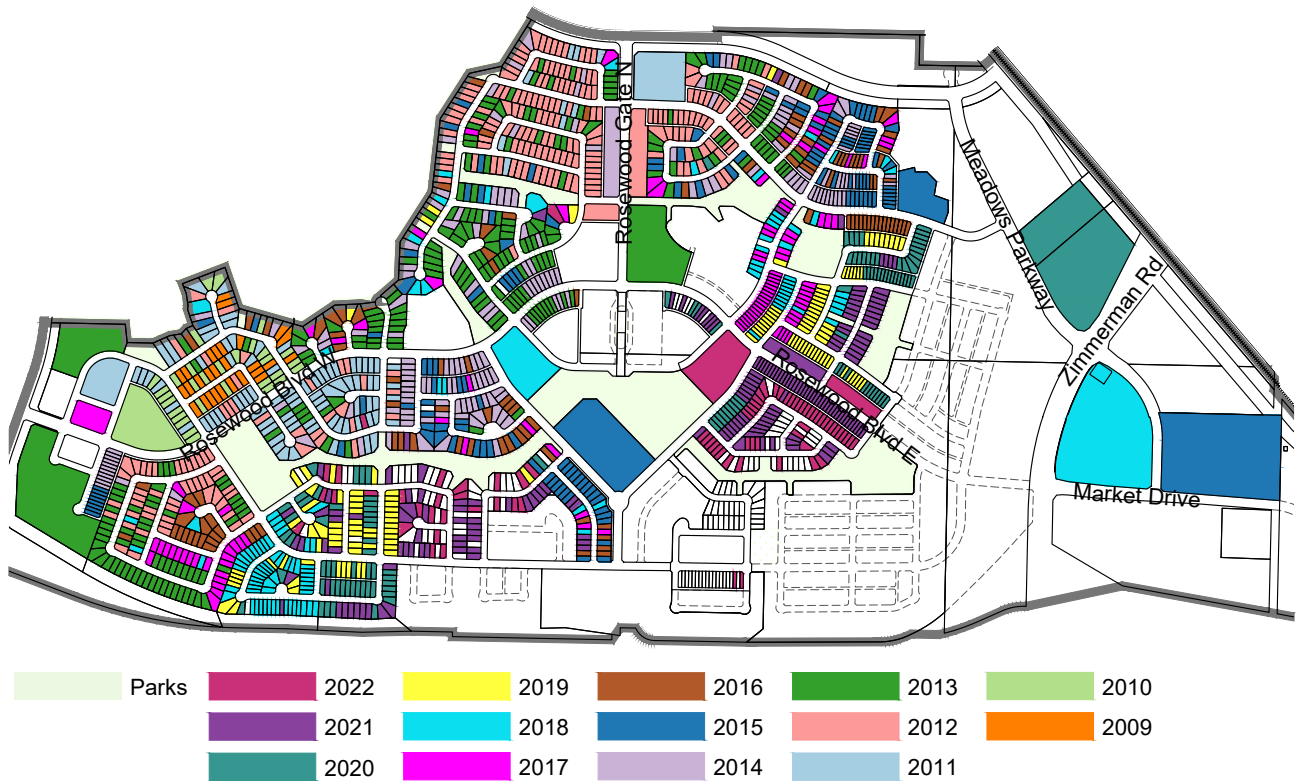


Figure 30: Stonebridge Development Permits

Source: Mapping & Research, City of Saskatoon

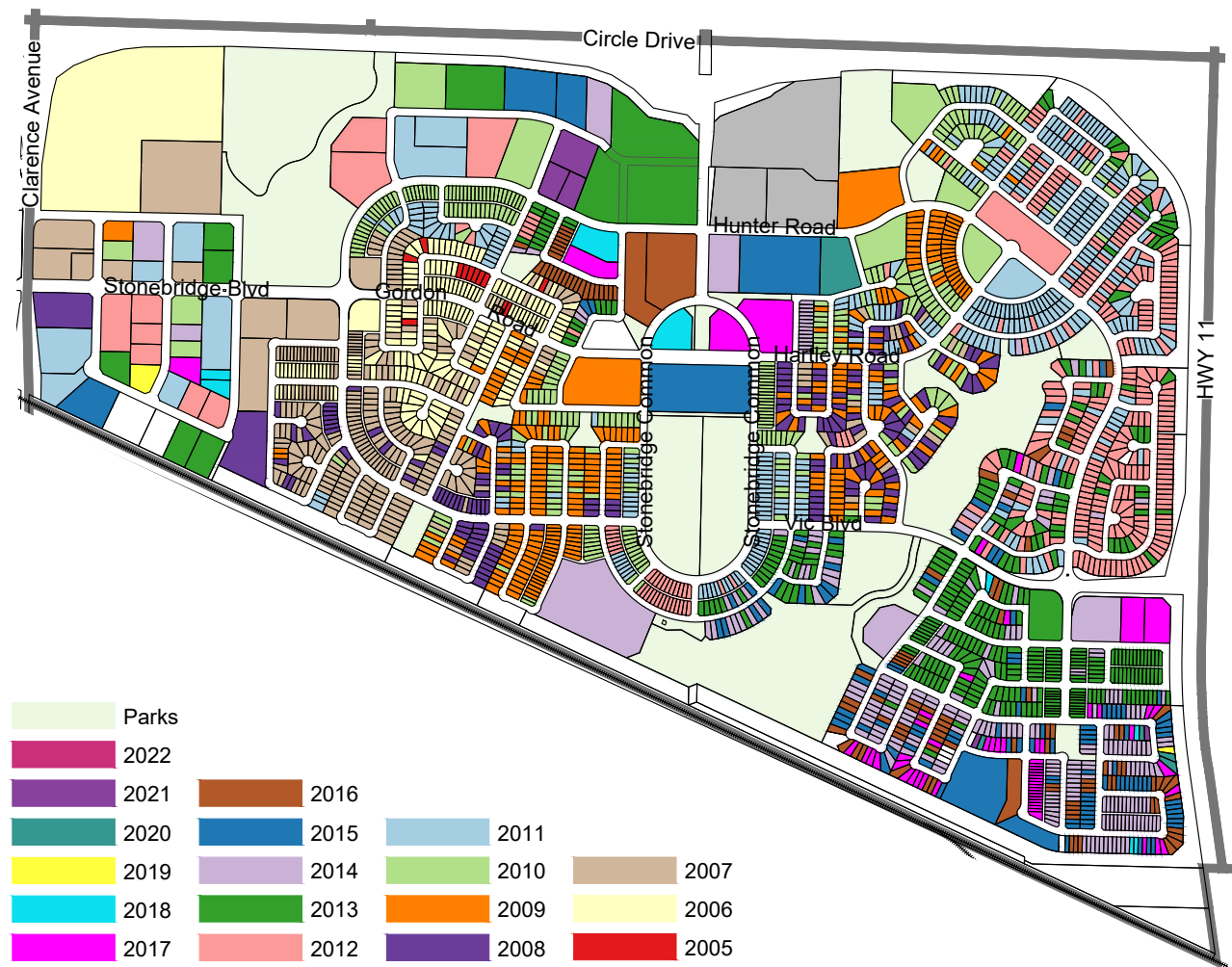
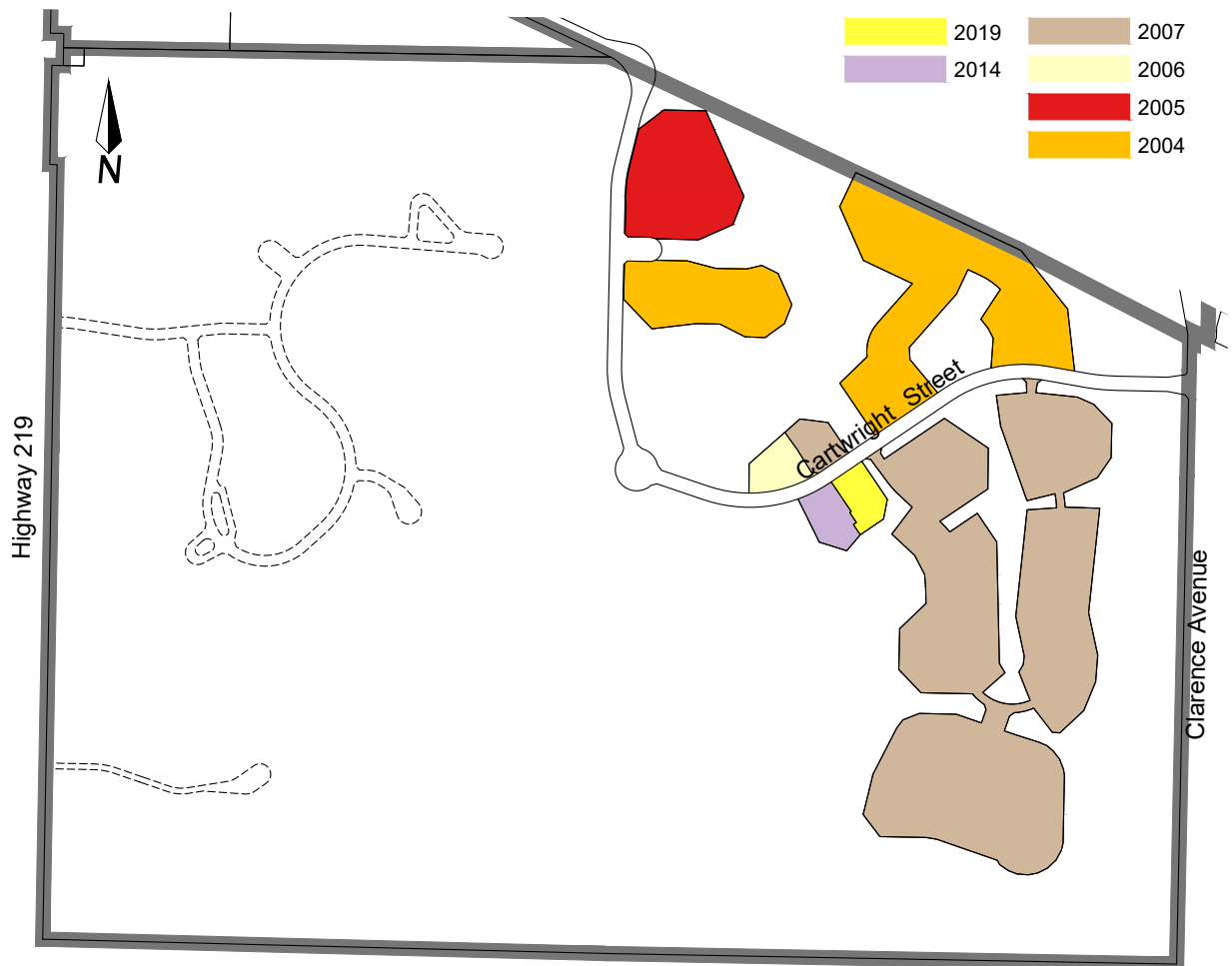


Figure 31: Willows Development Permits

Source: Mapping & Research, City of Saskatoon





Currently there are a total of 175.81 acres of vacant commercially zoned sites. This vacant commercial space has the potential to accommodate 7.65 million square feet of retail and/or office space.



SERVICING PLANS

SERVICING PLANS

Residential Servicing - Greenfield

Figures 32 through 36 show the servicing projections for new neighbourhood areas for the years 2023, 2024, and 2025. These servicing forecasts are primarily greenfield in nature, being that servicing typically already exists near infill sites. In some cases, servicing upgrades may be needed to accommodate infill opportunities, however, there are no servicing upgrades currently planned for the next three years.

Servicing projections for greenfield neighbourhoods are assembled from information provided by major developers within the city. Servicing projections represent a best-case scenario for servicing completion and assume satisfactory contractor performance and average weather conditions.

It should be noted that land developers have the option to scale back or accelerate servicing plans in response to market demand. Land developers can also control the timing of one-unit dwelling lots released to the market, further influencing supply. The planned servicing levels outlined in this report are projections and are intended to illustrate all land that is currently planned for servicing.

Table 16 identifies the one-unit dwelling lots projected to be serviced, by year, within each greenfield neighbourhood. These projections are separated, showing Saskatoon Land's land development program (Noted as 'City' in the table below) and planned servicing projections from the private development industry. A total of 2,706 one-unit dwelling lots are projected to be serviced over the next three years.

Table 16: One-Unit Dwelling Lot Servicing Projections, 2023 - 2025

Neighbourhood	2023		2024		2025		Total
	City	Private	City	Private	City	Private	
Aspen Ridge	250	0	200	0	152	100	702
Brighton	0	371	212	351	28	201	1,163
Holmwood SC	0	0	0	50	0	200	250
Kensington	39	0	127	0	0	0	166
Rosewood	0	145	0	125	0	80	350
Willows	0	25	0	25	0	25	75
Sub Total	289	541	539	551	180	606	—
Total	830		1,090		786		2,706

Source: 2021 City of Saskatoon Developer Survey

Table 17 identifies the servicing plans for multiple unit dwelling land by neighbourhood for 2023 to 2025. The number of acres of land being serviced through Saskatoon Land's land development program and the private development industry for each year is shown. Over the next three years, it is projected that 72.26 acres of land zoned for multiple unit dwellings will be serviced, capable of accommodating 1992 housing units.

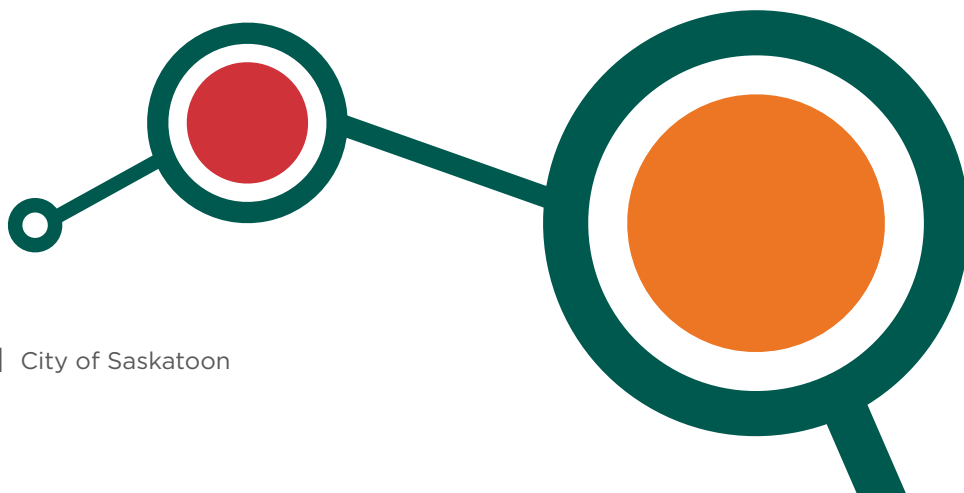


Table 17: Multiple-Unit Servicing Projections, 2023 – 2025

Neighbourhood	2023		2024		2025		Total	
	Acres	Potential Dwelling Units	Acres	Potential Dwelling Units	Acres	Potential Dwelling Units	Acres	Potential Dwelling Units
Aspen Ridge								
City	9.99	316	0	0	0	0	9.99	316
Private	0	0	0	110	0	0	2.72	109
Total	9.99	316	0	110	0	0	9.99	425
Brighton								
City	0	0	6.53	205	5.98	93	12.51	298
Private	2.07	32	10.4	207	8	295	20.47	534
Total	2.07	32	16.93	412	13.98	388	32.98	832
Holmwood SC								
City	0	0	0	0	0	0	0	0
Private	0	0	0	0	8	227	8	227
Total	0	0	0	0	8	227	8	227
Kensington								
City	9.43	188	3.21	50	0	0	12.64	238
Private	0	0	0	0	0	0	0	0
Total	9.43	188	3.21	50	0	0	12.64	238
Rosewood								
City	0	0	1.93	122	0	0	1.93	122
Private	4	148	0	0	0	0	4	148
Total	4	148	1.93	122	0	0	5.93	270
Summary								
City	19.42	504	11.67	377	5.98	93	37.07	974
Private	6.07	180	10.4	317	16	522	35.19	1,018
Grand Total	25.49	684	24.79	693	21.98	615	72.26	1,992

Source: 2022 City of Saskatoon Developer Survey

SERVICING PLANS

Total Residential Servicing

Table 18 below summarizes the one-unit dwelling and multiple-unit dwelling inventory and projected servicing schedules for new neighbourhood areas from the present through 2025.

Table 18: Residential Servicing Projections Summary, 2023 – 2025

Land Use	Inventory (potential dwelling units)	2023 Servicing (potential dwelling units)	2024 Servicing (potential dwelling units)	2025 Servicing (potential dwelling units)	Total (potential dwelling units)
One-Unit Dwelling	2,944	830	1,090	786	5,650
Multiple-Unit Dwelling	6,702	684	694	615	8,695
Total	9,646	1,514	1,784	1,401	14,345

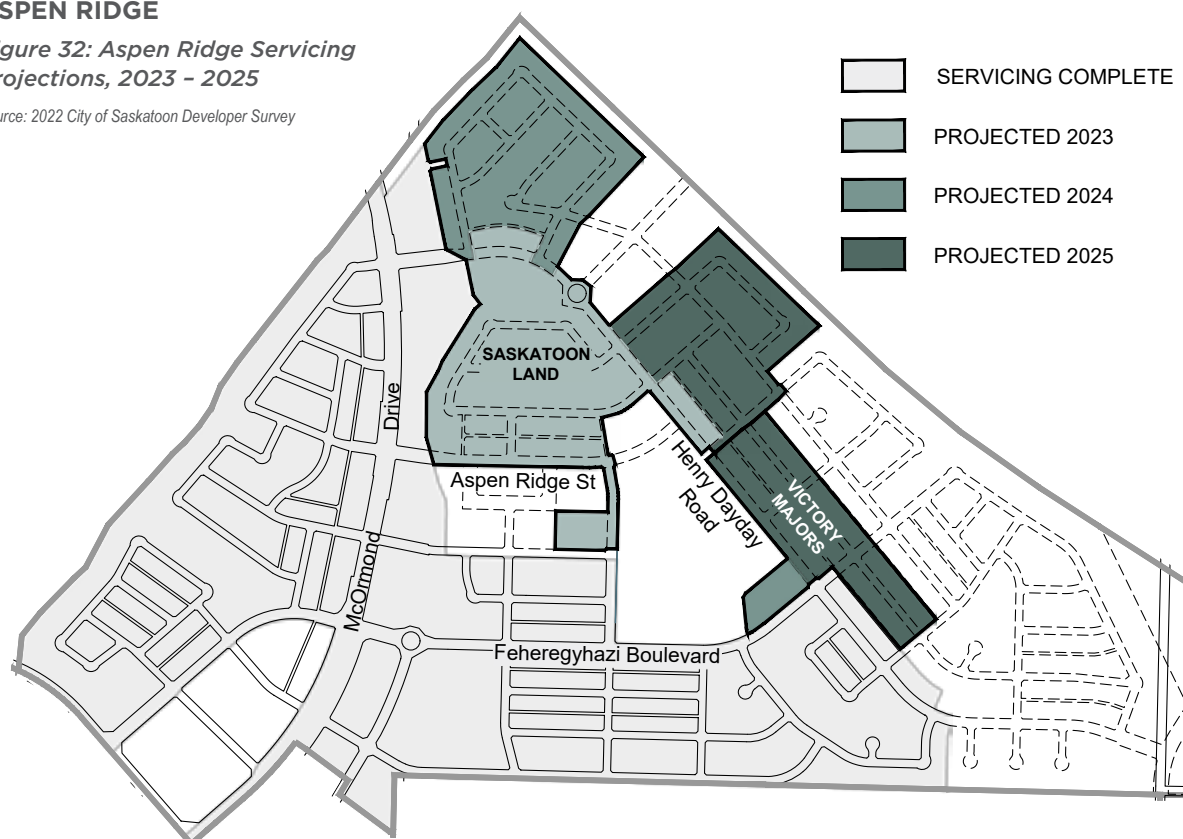
The current and projected residential servicing over the next three years will accommodate approximately 14,345 residential dwelling units, or 35,683 people. Of these, 9,646 units are existing inventory and 4,699 would be from newly serviced lots. This would support an annual population growth rate of 2% over a three-year period, which exceeds the City's growth projection and inventory targets. As noted, if growth rates are lower, developers can respond by delaying the servicing of new land to avoid an oversupply of serviced land and increased carrying costs. Risk levels, for both the City and private developers, can be managed by continuously monitoring land absorption and inventory levels. The use of a phased servicing approach that involves the installation of deep services one year and roadway construction the following year can also provide additional flexibility in managing capital outlay and land supply objectives.

Figures 32 through 36 identify the projected servicing schedules from 2023 to 2025 in approved new neighbourhood Concept Plan areas in Saskatoon.

ASPEN RIDGE

Figure 32: Aspen Ridge Servicing Projections, 2023 – 2025





Source: 2022 City of Saskatoon Developer Survey

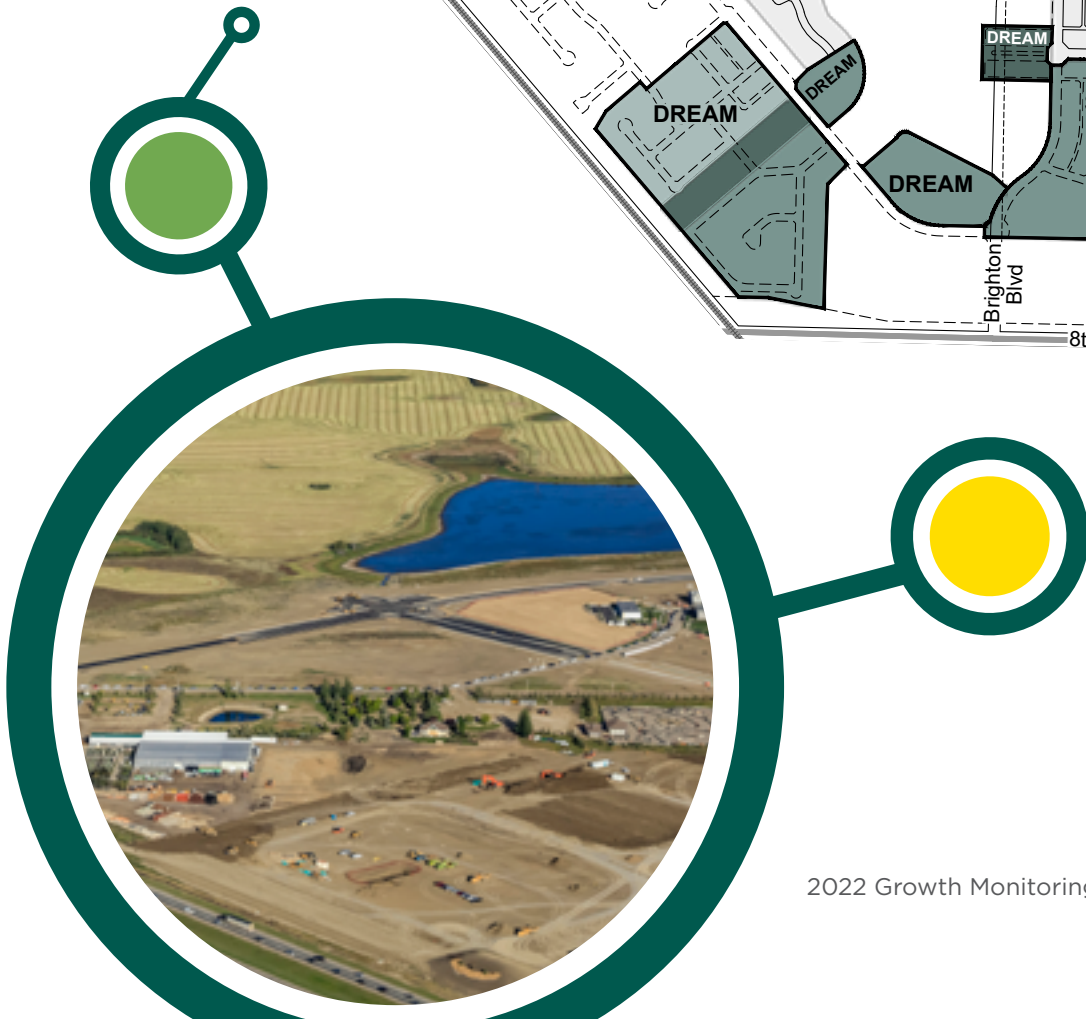
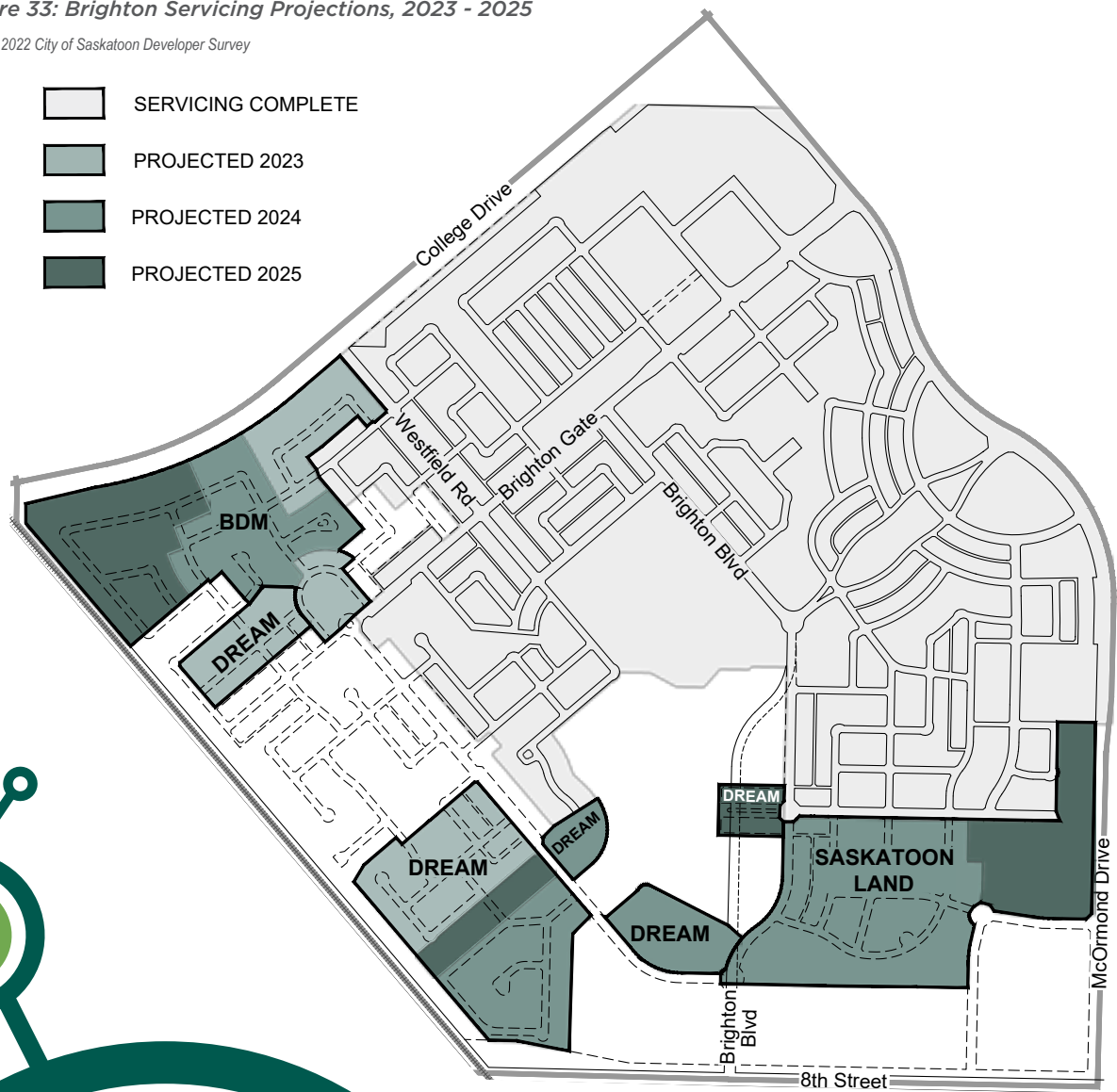


BRIGHTON

Figure 33: Brighton Servicing Projections, 2023 - 2025

Source: 2022 City of Saskatoon Developer Survey

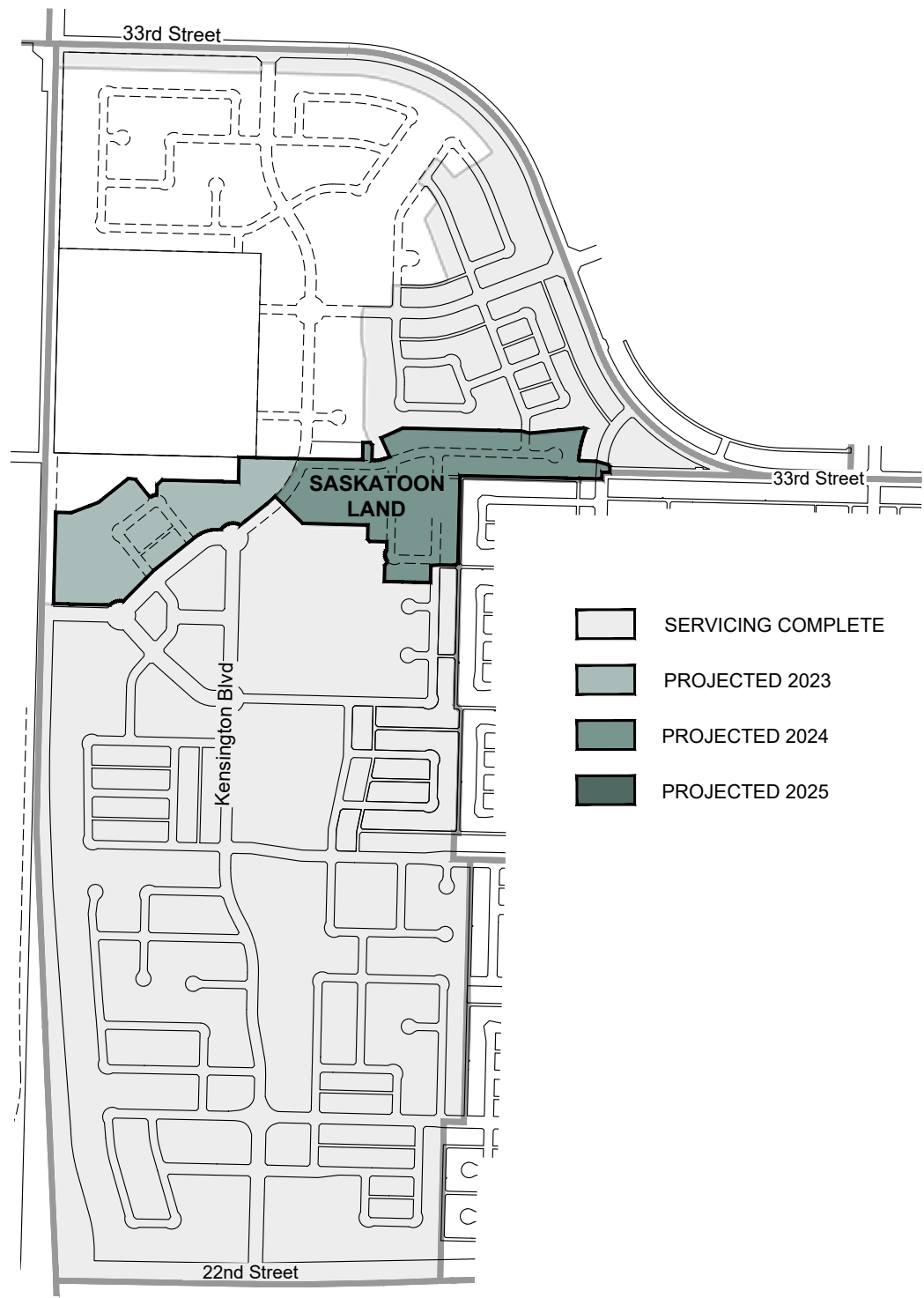
-  SERVICING COMPLETE
-  PROJECTED 2023
-  PROJECTED 2024
-  PROJECTED 2025



KENSINGTON

Figure 34: Kensington Servicing Projections, 2023 - 2025

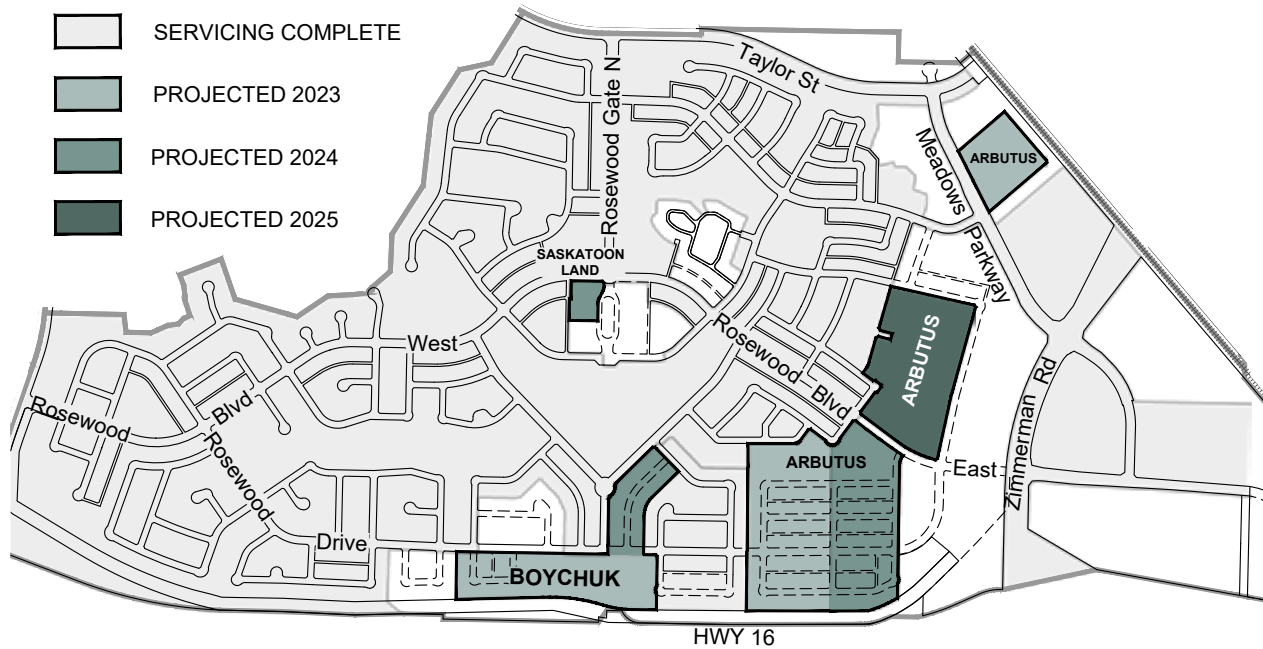
Source: 2022 City of Saskatoon Developer Survey



ROSEWOOD

Figure 35: Rosewood Servicing Projections, 2023 - 2025

Source: 2022 City of Saskatoon Developer Survey

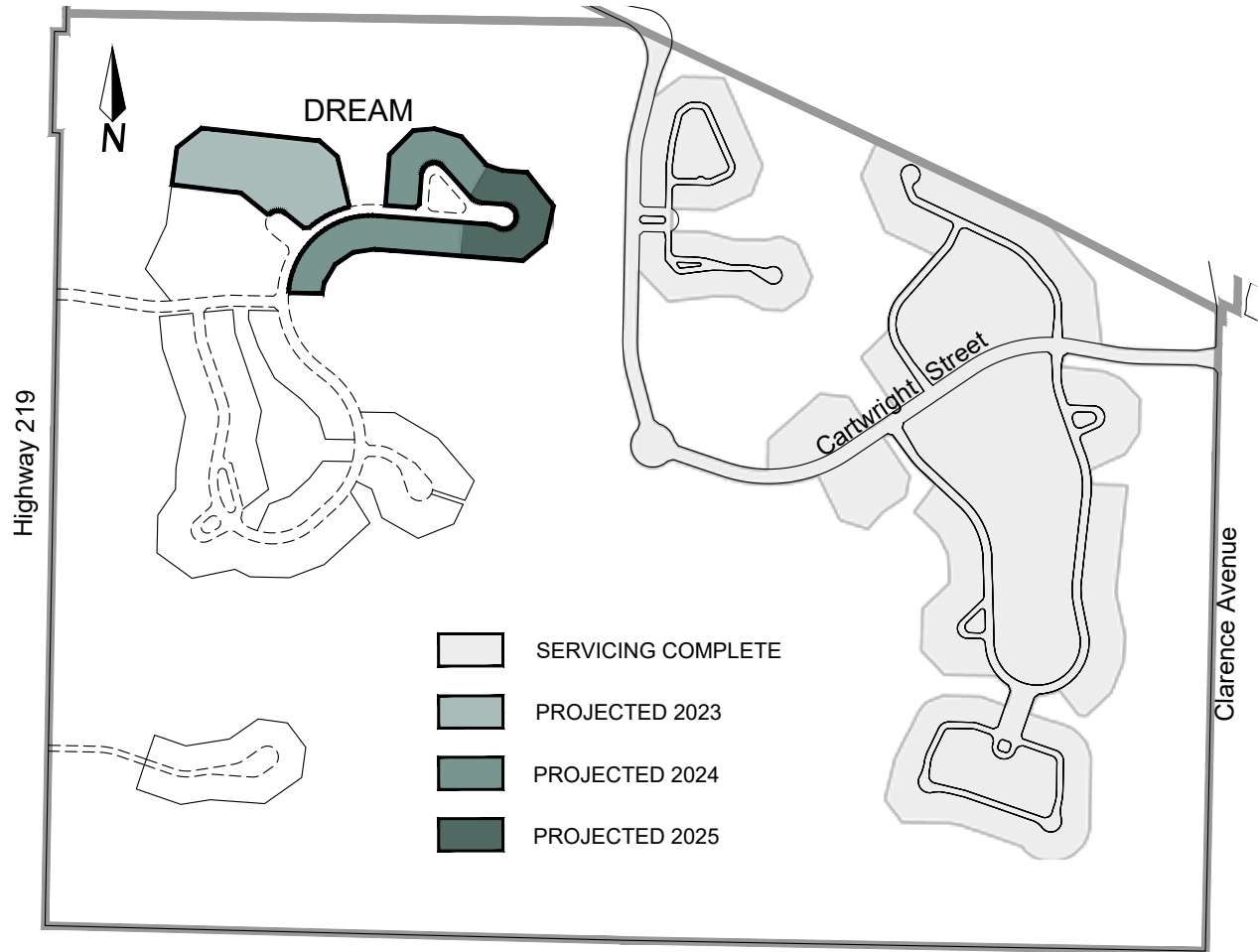


THE WILLOWS

Figure 36: The Willows Servicing Projections, 2023 - 20255

Source: 2022 City of Saskatoon Developer Survey

*SUBJECT TO APPROVAL OF CONCEPT PLAN AMENDMENT BY CITY COUNCIL



Residential Servicing – Infill Areas & Opportunities

To achieve the City's Strategic Goal of Sustainable Growth, identified in the City of Saskatoon Strategic Plan 2022 - 2025, Administration has identified target goals for residential infill development. Longer term goals in the City's Growth Plan to Half a Million identify redevelopment strategies that could significantly alter Saskatoon's overall growth pattern, shifting the balance of growth to 50% suburban and 50% infill, and contribute significantly to the availability of land for development.

While several infill opportunities are at the planning or exploratory stage, Table 19 provides a summary of larger projects within the City Centre area that are being undertaken by private developers. Renderings of the projects are shown in Figure 37.

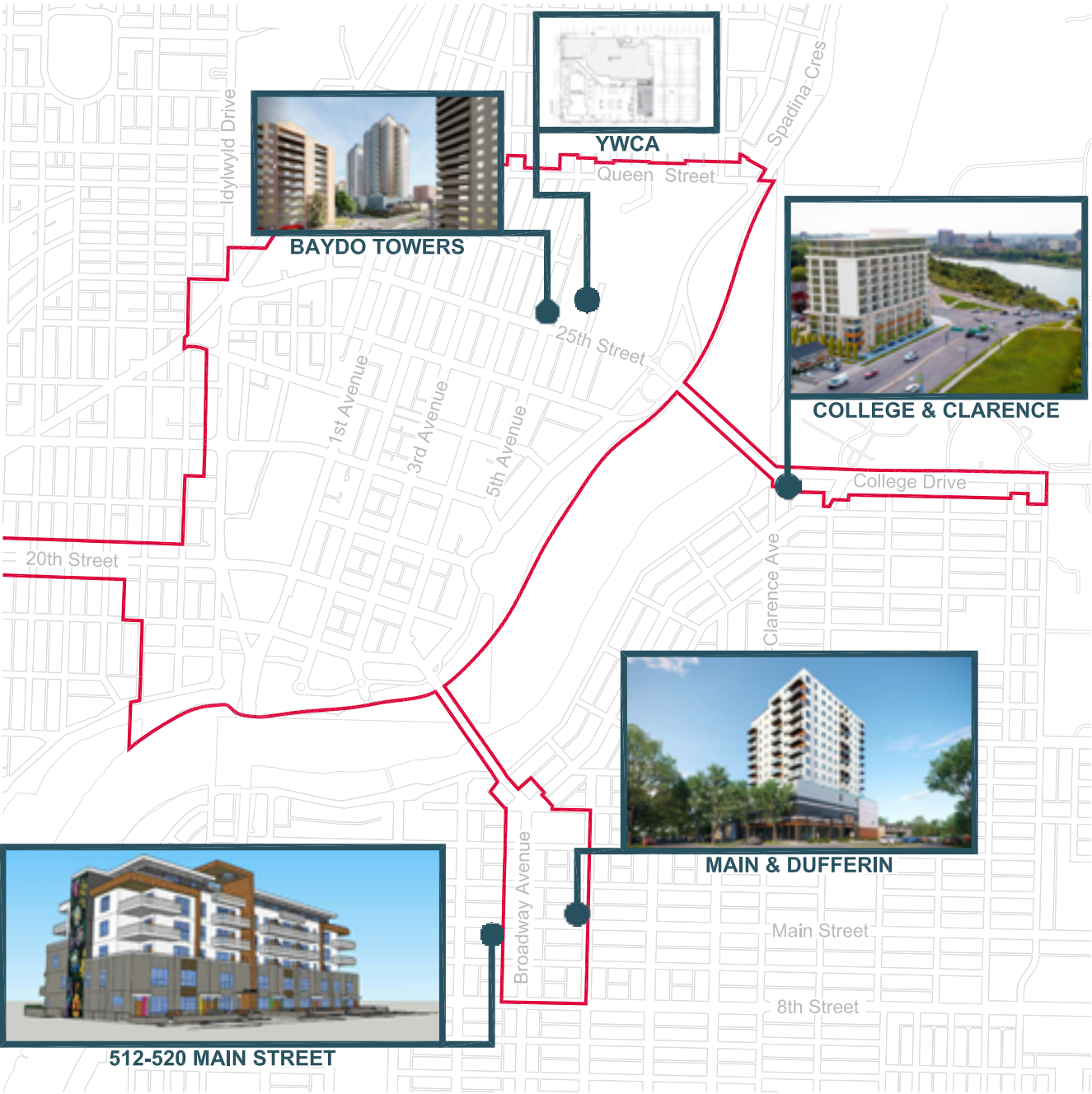
Table 19: City Centre Infill Projects

	Project/Location	Developer	Floors	Units
Under Construction	Main and Dufferin (639 Main Street)	Westcliff Properties	15	106
	Baydo Towers (410, 420 5th Avenue North)	Baydo Development Corporation	24, 25	474
Rezoning Approved	512 - 5210 Main Street	102065776 Saskatchewan Ltd	6	50
	College & Clarence (1006 College Drive and 421 Clarence Ave)	North Prairie Developments	12	171
	510 25th St E	YWCA	2	18
Total				819



Residential Infill Projects

Figure 37: Residential Infill Projects



Source: Planning and Development – City of Saskatoon

Infill Opportunities on City Owned Land

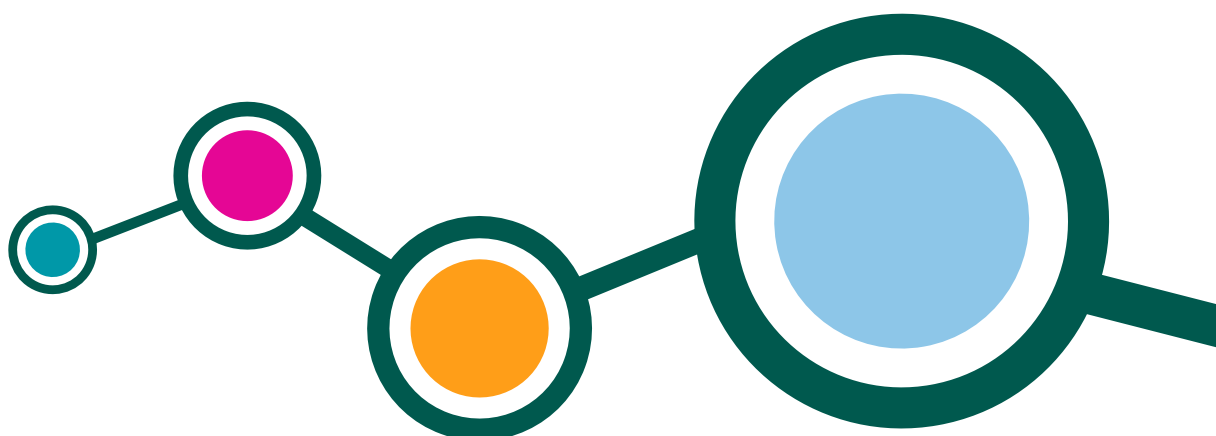
Saskatoon Land has typically focused on greenfield land offerings in its planned developments. This focus has changed to include more infill development opportunities in support of the Plan for Growth. Table 20 highlights some of the projects that Saskatoon Land has under way.

Proposed land uses and densities for several the projects listed below have yet to be determined and will be finalized once a thorough servicing and feasibility analysis is completed, and appropriate public engagement has occurred.

Table 20: Saskatoon Land Infill Opportunities

Site/Property	Details
South Caswell	Mixed-use community development on former Saskatoon Transit sites.
25th Street Development Sites	Currently exploring zoning changes for the sale and development of parcels cross from Saskatoon Police Headquarters.
Dundonald Avenue Parcels	Currently exploring potential development and servicing options for the site. These are remnant parcels remaining from Circle Drive South project.
900 Block - 3rd Avenue	Land holdings retained for potential 3rd Avenue road widening. Exploring preliminary development concepts in the event that lands are not required for the right-of-way dedication.
Adolph Crescent Development Site	Residential development site zoned RMTN1 - Medium Density Townhouse Residential District 1. Currently for sale.
River Landing	Parcel G Projected release of 2022 based on Market Conditions. Parcel E and Parcel BB projected to be released in 2023.
Berini Drive/Kerr Road Development Site (Erindale)	Land holding retained for a potential McKercher Drive extension. Exploring preliminary development concepts in the event that the lands are not required for right-of-way extension.
Tax Title Sites	A number of single-unit sites available over the counter for infill development in several neighbourhoods throughout Saskatoon including; Caswell Hill, Mayfair, Montgomery, Pleasant Hill, Sutherland, and Westmount.
2401 Broadway Avenue Development Site	Former electrical substation site operated by Saskatoon Light and Power. Currently exploring potential development and servicing options for the site.

Source: Saskatoon Land



Industrial and Commercial Servicing

Table 21 shows industrial servicing projections for the Hampton Village Business Park, Holmwood Suburban Centre, and Marquis Industrial for 2023 to 2025. The Hampton Village Business Park area, which is envisioned as an office/business park development, is not projected to receive any servicing upgrades over the next three years. Figures 38 and 39 illustrate projected industrial and commercial servicing for the Marquis Industrial and the Hampton Village Business Park Areas.

There are also a number of commercial construction and redevelopment projects occurring within the City Centre. These projects include the renovation and expansion of the Tees & Persse building (331 1st Avenue North), The Construction of the Great Western Brewing Company (519 2nd Avenue North), the addition of 3 stories of office and commercial space (317 4th Avenue S), and the conversion of the former Redline Harley Davison to the High Key Brewing Company (102 23rd St E). Figure 40 shows renderings of these projects.

As previously noted, there are vacant sites currently zoned for commercial development, totaling 175.81 acres. The current inventory of vacant commercial space has the potential to accommodate 7.65 million additional square feet of retail and/or office space.

Due to the current inventory of commercial space, and the amount of future commercial land that has been identified in Council approved Sector Plans and Concept Plans, it is anticipated that enough land is available for commercial opportunities over the next three years.

Table 21: Industrial & Commercial Servicing Projections, 2023 – 2025

Industrial/Commercial Servicing (acres)	2023		2024		2025		Total		
	City	Private	City	Private	City	Private	City	Private	Total
Hampton Village Business Park	0	0	0	12	0	2	0	14	14
Holmwood Suburban Centre	0	0	0	10	0	10	0	20	20
Marquis Industrial	0	0	26.81	0	40	0	66.81	0	66.81
Total	0	0	26.81	22	40	12	68.81	34	100.81

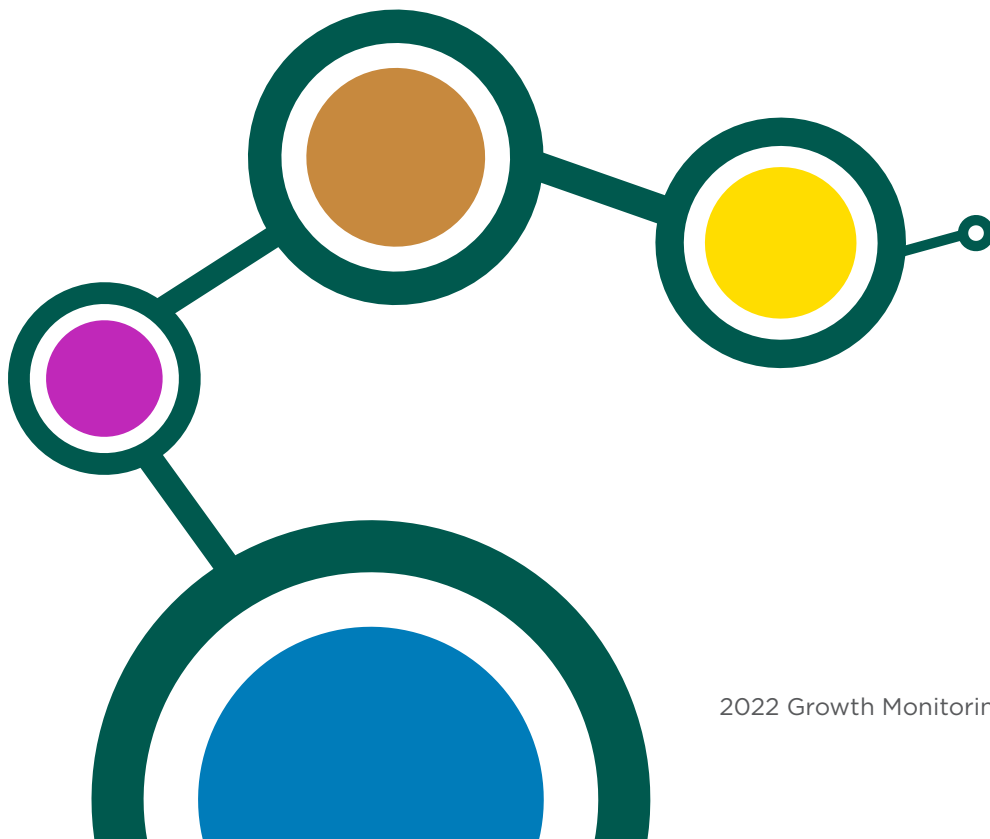
Source: 2022 City of Saskatoon Developer Survey



MARQUIS INDUSTRIAL

Figure 38: Marquis Industrial Servicing Projections, 2023 - 2025

Source: 2022 City of Saskatoon Developer Survey



HAMPTON VILLAGE BUSINESS PARK

Figure 39: Hampton Village Business Park Servicing Projections, 2023 - 2025

Source: 2022 City of Saskatoon Developer Survey




Commercial Infill Projects

Figure 40: Commercial Infill Projects



Source: Planning and Development – City of Saskatoon

An aerial photograph of a residential development. In the center, there are several large, multi-story apartment buildings with blue roofs. Surrounding these are various other structures, including smaller houses and commercial buildings. A large, open dirt area is visible in the lower center, likely a construction site. A green lawn with a small, circular, landscaped area is located to the right of the central dirt area. The background shows a mix of green fields and brown, undeveloped land. A green and yellow circular graphic is positioned on the left side of the image, partially overlapping the text.

The residential inventory and planned servicing schedules over the next three years will accommodate enough residential dwelling units to accommodate 35,683 people, or 14,345 residential dwelling units.

APPENDIX



APPENDIX

Appendix 1

Detailed Sector Plan Calculations (Acres)

	West				
	Blairmore	Confederation	Riel Industrial	Lawson	Core
Sector Gross Area	7,246.25	6,027.19	11,110.57	3,070.89	2,659.27
Total Unbroken Land	5,105.66	—	4,418.48	—	—
Sector Number of Neighbourhoods	8.00	18.00	8.00	9.00	9.00
Sector Average Neighbourhood Size	440.11	330.16	1,115.35	341.21	295.47
Sector Population at Full Build-Out	72,168.00	62,980.00	—	36,183.00	40,738.00
Total Number of Neighbourhood Parks	4 (13.2 ac)	33 (304.6ac)	1 (5.1ac)	12 (129.8ac)	21 (78.8ac)
Total Number of District Parks	2 (30.1 ac)	5 (80 ac)	—	5 (50.4 ac)	4 (46.2 ac)
Total Number of Multi-District Parks	1 (34.7 ac)	3 (63.6 ac)	—	1 (23.7 ac)	1 (17.8 ac)
Total Number of Industrial Parks	0	1 (0.9 ac)	—	0	0
Total Number of Special Use Parks	1 (11.7 ac)	3 (10.9 ac)	3 (25.4 ac)	6 (136.8 ac)	11 (139.8 ac)
Total Number of Elementary Schools	—	25.00	—	12.00	9.00
Total Number of High Schools	2.00	2.00	—	2.00	5.00
Total Commercial	80.60	162.81	15.64	105.17	423.91
Total Industrial	58.43	501.84	4,335.18	288.06	68.99
Total Vacant Commercial Land	2.21	2.30	—	4.13	30.99
Total Vacant Industrial Land	11.68	35.11	255.29	3.83	2.06

Appendix 1 continued on page 73.


Appendix 1

Detailed Sector Plan Calculations (Acres)

Appendix 1 continued from page 72.

	East				
	University Heights	Nutana	Lakewood	Holmwood	University
Sector Gross Area	8,351.95	6,190.84	4,095.58	6,329.55	2,360.20
Total Unbroken Land	3,918.94	180.56	194.81	5,426.12	2,360.20
Sector Number of Neighbourhoods	11.00	19.00	9.00	3.00	4.00
Sector Average Neighbourhood Size	443.30	353.55	455.06	903.43	n/a
Sector Population at Full Build-Out	79,464.00	55,311.00	48,755.00	76,143.00	54,878.00
Total Number of Neighbourhood Parks	46 (228.4 ac)	45 (231.7 ac)	19 (318.8 ac)	2 (13.3 ac)	0
Total Number of District Parks	2 (47.8 ac)	7 (115.1 ac)	4 (129.3 ac)	0	0
Total Number of Multi-District Parks	1 (24.8 ac)	1 (2.3 ac)	2 (31.6 ac)	0	0
Total Number of Industrial Parks	0	0	0	0	0
Total Number of Special Use Parks	5 (8.7 ac)	3 (126.2 ac)	0	0	0
Total Number of Elementary Schools	12	18	12	0	0
Total Number of High Schools	2	3	1	0	0
Total Commercial	164.43	261.01	208.9	70.71	202.68
Total Industrial	341.75	389.95	41.79	0	0
Total Vacant Commercial Land	55	0.68	7.34	12.92	72
Total Vacant Industrial Land	1.51	23.21	22.16	0	0

Source: Mapping and Research – City of Saskatoon



Based on the City's annual population estimates, Saskatoon has been growing at an average annual rate of 1.9% for the last 10 years (2012 to 2022) and 1.2% for the last 3 years (2019 to 2021).



Photo credit: Tourism Saskatoon/Nick biblow



saskatoon.ca/planning

Prepared by
Planning & Development

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