



Greater Golden Horseshoe (GGH) Residential Land Adequacy Report Series

City of Oshawa, 2006-2016

Report No. 4

April 21, 2017

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University**

**Centre for Urban Research
& Land Development**
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City of Oshawa, 2006-2016

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April 21, 2017

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The opinions expressed in this research report are those of the authors only and do not represent opinions and views of either CUR or Ryerson University.

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1. OSHAWA HIGHLIGHTS

Policy 1.4.1b in the *Provincial Policy Statement* (2014) requires municipalities to maintain at all times at least a minimum three-year supply of residential land for a mix of housing types (which means at least four years with annual monitoring, which the City of Oshawa does). The summary below shows the land supply adequacy by housing type for the city of Oshawa as of December 31st, 2016.¹

Adequacy of Short-Term Residential Land Supply as of December 31, 2016

Type of Unit	Rating of Adequacy	Years' Supply
Singles/Semis	Poor	2.4 years
Townhouses	Ample	15.0 years
All Ground-Related	Adequate	4.7 years
Apartment	Ample	11.6 years

Sources: CUR based on data in Appendix Table 3.

Townhouses, followed by apartment units, had the greatest land supply (15.0 and 11.6 years, respectively). The supply of ground-related housing (singles/semis and townhouses) was “adequate” because of the high supply of townhouses (4.7 years). The singles/semis land supply was much lower, sitting below the minimum annual requirement (2.4 years).

¹ The 2016 years' land supply is based on average annual housing starts in the latest 10 years (2007-2016). Using average starts from the recent three years as an estimate of demand results in lower years' land supply for all housing types. If the average from the latest three years (2014-2016) was used instead, the years' land supply would be 2.2 years for singles/semis (“poor”), 7.6 years for townhouses (“ample”), 3.8 years for ground related (“poor”) and 5.2 years for apartments (“adequate”). The rating of adequacy categories are:

- Ample – More than a 6.0 years' supply
- Adequate – 4.6 to 6.0 years' supply
- Minimum – 4.0 to 4.5 years' supply
- Poor – less than a 4.0 years' supply

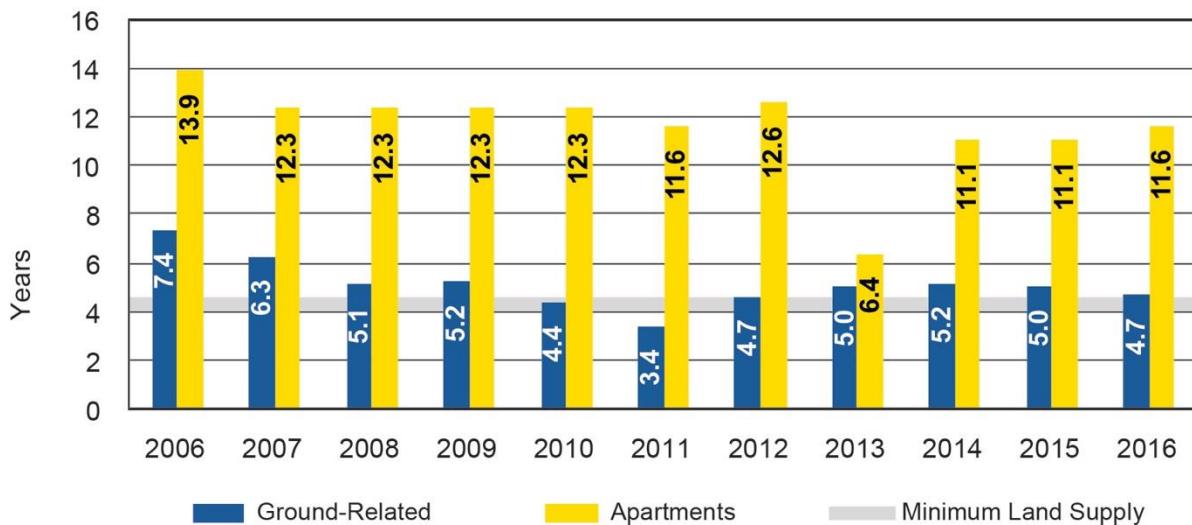
2. YEARS' SUPPLY OF SHORT-TERM LAND

2.1 Ground-Related Housing and Apartments

At the end of 2016, the years' land supply of ground-related housing in Oshawa was 4.7 years. This was an "adequate" rating and it was slightly above the minimum annual requirement. The averages of the most recent five years (2012 to 2016) and prior five years (2007 to 2011) were both 4.9 years. Though the averages are the same, the 2006 land supply (not included in the average) was the highest within the eleven-year period. The land supply changed from being "ample" in 2006 and 2007, to "adequate" following 2008. There was one exception in 2011 when the land supply was "poor."

Apartment land supply was much higher than ground-related housing, at 11.6 years at the end of 2016. The land supply also decreased over the last ten years, with a recent five-year average of 10.6 years (2012 to 2016). This is lower than the previous five-year (2007 to 2011) average of 12.2 years. Even with the decline, and a low in 2013 of 6.4 years, apartment supply has consistently been "ample."

Figure 1:
Years' Supply of Short-Term Land by Type of Housing Unit, City of Oshawa, 2006 - 2016



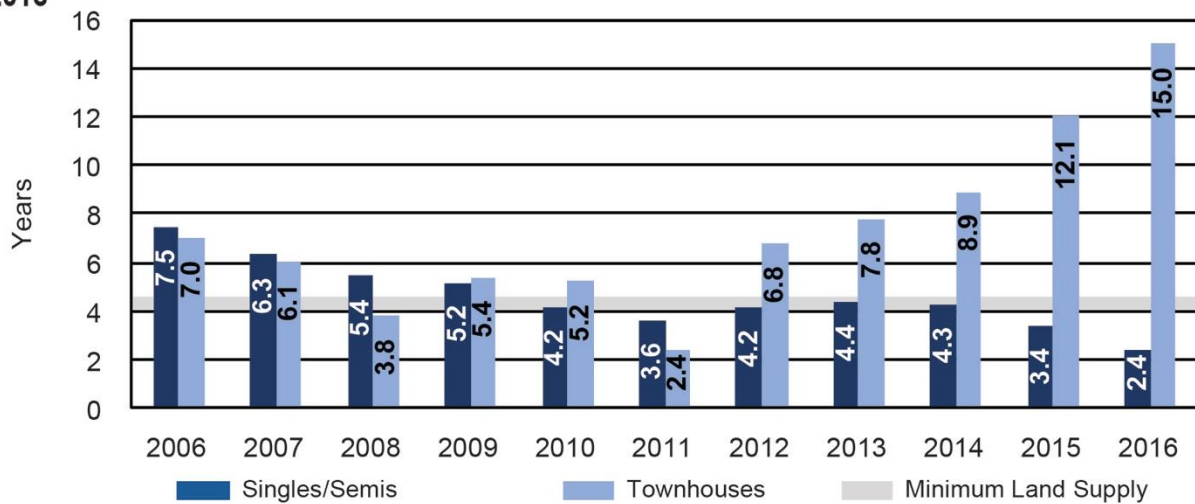
Source: CUR based on data in Appendix Table 3.

2.2 Singles/Semis and Townhouses

At the end of 2016, the singles/semis land supply was 2.4 years. The land supply of singles/semis has declined from an “ample” rating in 2006 and 2007 to a “poor” rating in 2016. The five-year averages also reflect this decline with an average 5.0 years between 2007 and 2011, to an average 3.7 years in 2012 to 2016.

Townhouse land supply was 15.0 years in 2016 and is considered “ample.” The land supply has greatly increased since a low in 2011 of 2.4 years. The five-year averages reflect this trend with a recent (2012 to 2016) average of 10.1 years and a previous (2007 to 2011) average of 4.6 years. The proportion of townhouses in the overall ground-related supply has grown from 17% in 2006 to 59% in 2016. Townhouses are the reason why the ground-related land supply has stayed above the “minimum” rating in the last five years.

Figure 2:
Years' Supply of Short-Term Land for Singles/Semis and Townhouses, City of Oshawa, 2006 - 2016



Source: CUR based on data in Appendix Table 3.

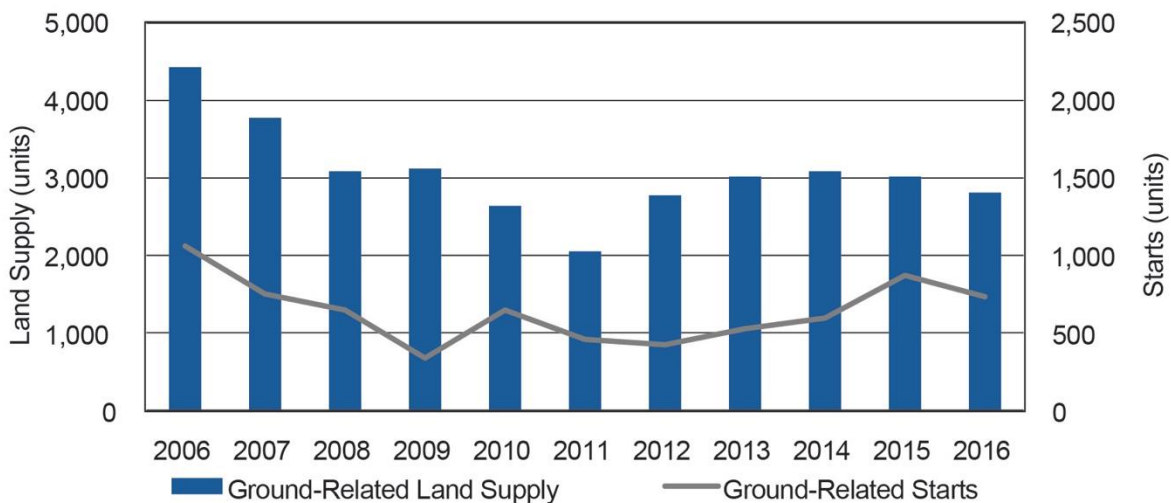
3. ANNUAL HOUSING STARTS AND SHORT-TERM LAND SUPPLY

3.1 Ground-Related Housing

Ground related starts have decreased from 2006 to 2016. There was a low in 2009 during the economic downturn. Starts increased between 2012 and 2015, although there was a slight drop in 2016. This downward trend is also seen in the land supply. The land supply decrease was most pronounced from 2006 to 2011. The years 2012 to 2016 have been more stable, though much lower than the high in 2006.²

Housing units in proposed draft plans (plans that are not yet approved and may be revised) are not included in the land supply. In 2016, Oshawa reported many proposed ground-related units. There were 3,554 proposed singles/semis, 2,227 townhouses and 3,758 apartment units. If these units were included, the 2016 years' ground-related supply would be 14.3 years, much higher than the 4.7 years without proposed draft plans.

Figure 3:
Ground-Related Housing Starts and Short-Term Land Supply, City of Oshawa, 2006 - 2016



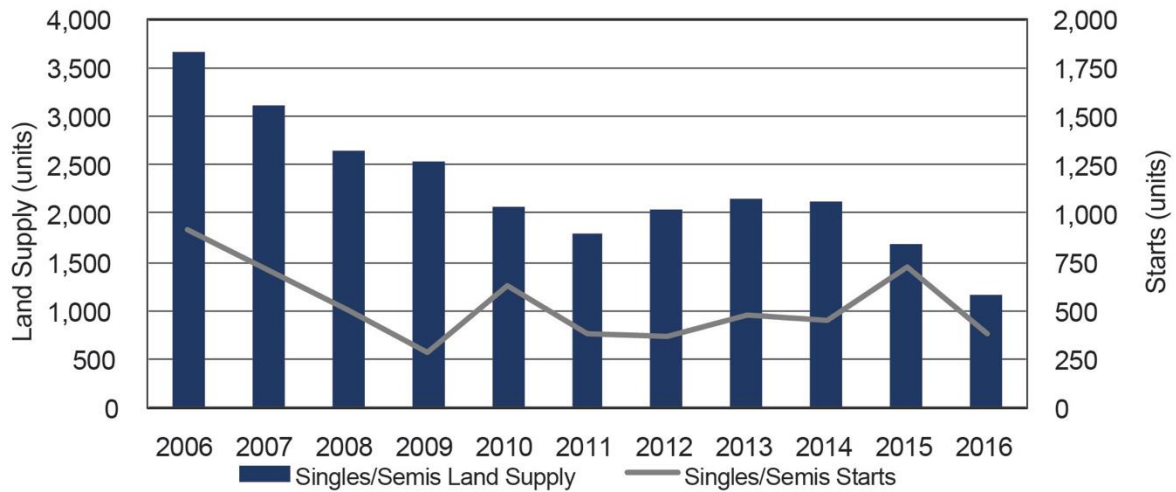
Source: CUR based on data in Appendix Tables 1 and 2.

² Housing units in proposed draft plans are not included in the land supply. In 2016, Oshawa reported a large number of proposed ground-related units. There were 3,554 proposed singles/semis, 2,227 townhouses and 3,758 apartment units.

3.2 Singles/Semis

The singles/semis starts have decreased; they were twice as high in 2006 than in 2016. The decrease has not been consistent, however, and there were increases in 2010 and 2015. The land supply of singles/semis has declined from 2006 to 2016, likely contributing to the similar decline in starts. Land supply was three times lower in 2016 than in 2006.

Figure 4:
Singles/Semis Housing Starts and Short-Term Land Supply, City of Oshawa, 2006 - 2016

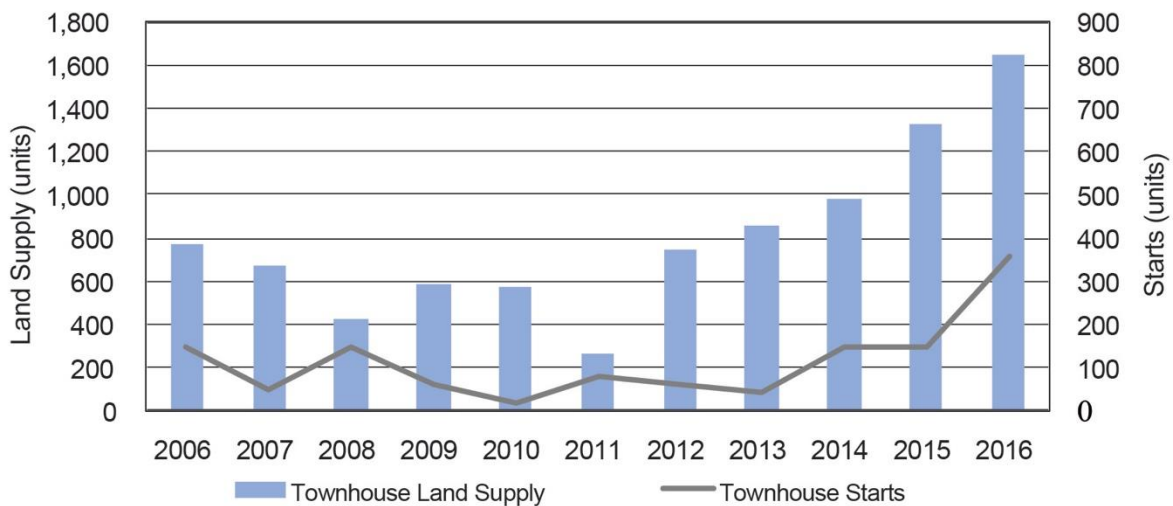


Source: CUR based on data in Appendix Tables 1 and 2.

3.3 Townhouses

Townhouse starts almost doubled in 2016 compared to 2006. The increase in starts follows a similar trend as the land supply increase. Although there has been an overall increase in both starts and land supply, there has been some fluctuation. Starts declined from 2008 to 2010, likely connected to economic downturn. Land supply was lowest in 2008 and 2011, two years when starts slightly increased. There has been a consistent increase in land supply since 2012, with an eleven year high in 2016.

Figure 5:
Townhouse Housing Starts and Short-Term Land Supply, City of Oshawa, 2006 - 2016

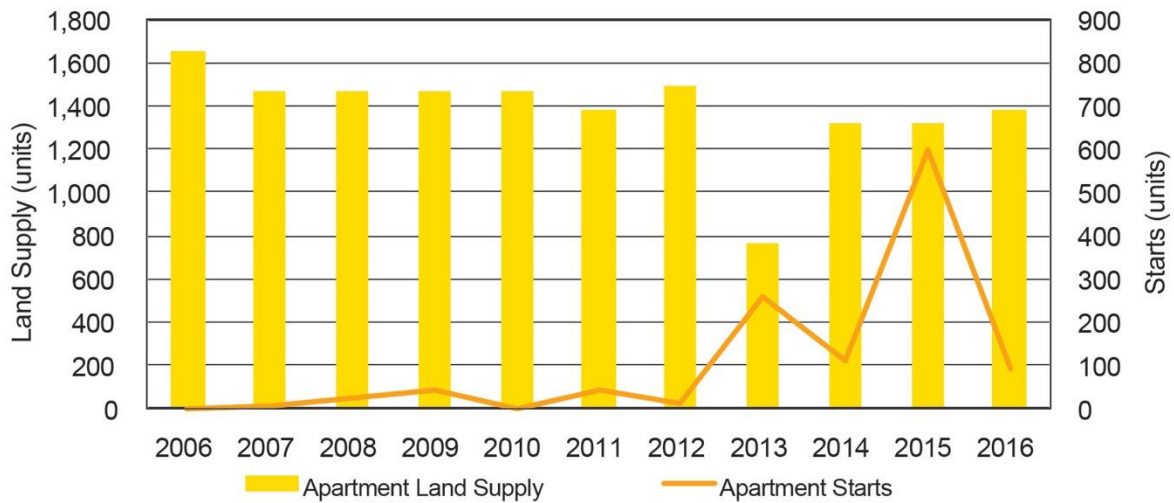


Source: CUR based on data in Appendix Tables 1 and 2.

3.4 Apartment

Apartment starts have been minimal over the last eleven years. Starts increased in 2013, reached a high in 2015 and then fell in 2016. Apartment land supply³ has been relatively consistent, aside from a low in 2013. There has been a slight decline overall since the high in 2006, though the decline has been minimal. Land supply data only included subdivision plans and did not account for infill and intensification. The land supply represented here may underrepresent actual supply.

Figure 6:
Apartment Housing Starts and Short-Term Land Supply, City of Oshawa, 2006 - 2016



Source: CUR based on data in Appendix Tables 1 and 2.

³ Apartment land supply is underestimated because it does not include units in infill or intensification units. The land supply represented above includes units in draft approved and registered plans of subdivision.

APPENDIX: TECHNICAL NOTES AND BACKGROUND DATA

Year's Supply of Short-Term Land

Hemson Consulting produced housing demand forecasts in 2005 and 2013 for single and upper tier municipalities as a background report for the 2006 *Growth Plan*. The report does not include a forecast specific to the City of Oshawa, a lower-tier municipality. In place of this forecast, the historical 10-year average housing starts (2007 to 2016) was used as an estimation of annual demand. Oshawa's years' supply was calculated by dividing annual supply (see Appendix Table 1) by the ten-year (2007-2016) average annual housing starts (see Appendix Table 2). Supply data was reported in Oshawa's *Annual Housing Monitoring Report*.

Appendix Table 3 contains the data used to produce Figures 1 and 2.

Annual Housing Starts and Short-Term Land Supply

Figures 3 to 6 compare the trends in land supply and housing starts. Land supply is from the City of Oshawa's annual *Housing Monitoring Report* (see Table 1). The supply is categorized as:⁴

- Draft approved plans
- Lots in registered plans without building permits issued

Proposed draft plans are not included, nor are units outside of subdivisions such as infill and intensification. The City of Oshawa's supply data are assumed to be an accurate representation of land supply.

Housing start data are from the Canada Mortgage and Housing Corporation and the data are found in Appendix Table 2.

⁴ Status are from the City of Oshawa's *Annual Housing Monitoring Report*

Appendix Table 1:**Short-Term Land Supply by Type of Housing Unit in the City of Oshawa, 2006 – 2016***

Year	Singles/ Semis	Townhouse	Ground- Related**	Apartment	Total
			Units		
2006	3,656	771	4,427	1,655	6,082
2007	3,100	666	3,766	1,466	5,232
2008	2,652	419	3,071	1,466	4,537
2009	2,539	591	3,130	1,466	4,596
2010	2,056	575	2,631	1,466	4,097
2011	1,778	269	2,047	1,376	3,423
2012	2,038	748	2,786	1,494	4,280
2013	2,158	861	3,019	759	3,778
2014	2,108	982	3,090	1,321	4,411
2015	1,681	1,331	3,012	1,321	4,333
2016	1,163	1,651	2,814	1,375	4,189

*The land supply includes housing units in draft approved plans and units on lots in registered plans without building permits issued. This excludes housing units in proposed draft plans and units intended to be developed through the site plan approval process (i.e. units which were not in a plan of subdivision).

**Ground-related housing includes singles/semis and townhouses.

Source: City of Oshawa, *Housing Monitoring Report*, 2006 to 2016.

Appendix Table 2:**Housing Starts by Type of Unit in the City of Oshawa, 2006 - 2016**

Year	Singles/ Semis	Townhouse	Ground- Related*	Apartment	<u>Total</u>
			Units		
2006	918	147	1065	0	1,065
2007	705	46	751	6	757
2008	498	149	647	27	674
2009	279	59	338	42	380
2010	630	16	646	0	646
2011	380	77	457	44	501
2012	361	63	424	9	433
2013	482	40	522	261	783
2014	452	147	599	110	709
2015	721	146	867	595	1,462
2016	383	357	740	94	834
10-Year Average (2007 - 2016)	489	110	599	119	718

*Ground-related housing includes singles/semis and townhouses.

Source: CMHC. *Starts and Completions Survey*. 2006 to 2016.

**Appendix Table 3:
Years' Supply of Short-Term Land by Type of Unit in the City of Oshawa,
December 31, 2016**

Year	Singles/ Semis	Townhouse	Ground- Related*	Apartment	Total
			Years		
2006	1.7	7.0	1.5	13.9	8.5
2007	1.5	6.1	1.3	12.3	7.3
2008	1.2	3.8	1.0	12.3	6.3
2009	1.2	5.4	1.1	12.3	6.4
2010	1.0	5.2	0.9	12.3	5.7
2011	0.8	2.4	0.7	11.6	4.8
2012	1.0	6.8	0.9	12.6	6.0
2013	1.0	7.8	1.0	6.4	5.3
2014	1.0	8.9	1.1	11.1	6.1
2015	0.8	12.1	1.0	11.1	6.0

*Ground-related housing includes singles/semis and townhouses.

Source: Appendix Tables 1 and 2.