

COUNTY OF WELLINGTON

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March 28th, 2024

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Good Day,

Please find attached to this letter a recent Planning Committee report that details the last year's residential development activity in Wellington.

This report provides insights into several different residential development metrics, including how many residential permits were issued across our County, the on-going diversification of our housing stock, and the total vacant residential unit supply that exists in Wellington. We are sharing this information with you as a resource to help inform discussions about housing in our community and to highlight the good work we are all doing as municipal governments to facilitate and approve our supply of housing.

We also wanted to take this time to recognize and thank your planning and building staff for their continued support in providing the information necessary to help make this kind of reporting happen.

Should you have any questions about the attached report or any other planning matter, please feel free to contact me. My staff and I are always prepared to meet with you and discuss matters of importance to your community.

Regards,

Aldo L. Salis, BES, MSc, RPP, MCIP
Director of Planning and Development
County of Wellington

c. Scott Wilson, CAO, County of Wellington



Committee Report

To: Chair and Members of the Planning Committee
From: Jameson Pickard, Senior Policy Planner
Paul Barson, GIS Programme Manager
Date: Thursday, March 14, 2024
Subject: **2023 Residential Development Monitoring**

1.0 Purpose

The purpose of this report is to provide a year-end review of development applications and municipal building permit activity across the County, as well as provide a point-in-time check of the residential unit supply. The report provides an analysis of this information and an assessment of how the County is tracking to Provincial land supply obligations in the Provincial Planning Statement. This information will serve as a resource to service data needs and provide an update to Planning Committee and Council on development trends in the County. Moving forward, Staff plan to provide this report on an annual basis. Attached in Appendix A is an Infographic which summarizes some of the 2023 statistics discussed in this report.

It is important to note that this report focuses on market housing at this time. Wellington County's Housing Services Division has detailed reporting on social and affordable housing creation outlined in their 10-year Housing and Homelessness Plan and Annual update reports. We will be working with the Housing Services Division to develop an affordable housing component for this report which supports their work, is meaningful to our member municipalities and is reflective of Provincial planning policy changes related to affordable housing.

2.0 Background

One of the Planning and Development Department's core functions is to continuously monitor building permit activity and development applications. This tracking helps the County monitor trends, support information requests, and populate land inventories used in long range planning and forecasting. Over the years, Planning Staff have reported to Planning Committee on this information in various ways and at differing time intervals, depending on project needs or direction. For Example, this information has come through reports on the Residential Inventory Reports and Performance Measures submissions.

Planning Staff maintain a real time Residential Inventory, which tracks the potential supply of vacant residential units across the County. The Inventory was initially developed over 20 years ago to assist County planning staff and consultants with population and household forecasting exercises. The Inventory evolved over the years in response to the greater need to track growth and Provincial policy direction and today has a wider range of uses. The principal use of the Inventory continues to be input into population and household growth forecasts.

Staff also prepares an annual Performance Measures report which provides information on agricultural land loss and residential building permit activity across the County. Staff have been providing this report to Planning Committee since 2000, as an input into the Treasury Department's Financial

Information Return submitted to the Province annually. Moving forward building permit information will not be contained in the annual Performance Measures Report because our Member Municipalities report this information to the Province. A modified Performance Measure report will continue to be provided to the Planning Committee to track agricultural land change across the County.

3.0 Residential Inventory

The Residential Inventory is a GIS (Geographic Information System) database containing information about the vacant residential land and unit supply in the County. It includes residential supply data for both the urban and rural systems. The potential unit supply is derived from submitted development applications, pre-consultations, and best practice assumptions (vacant lands). This inventory is updated in real time and allows the Planning Department to track potential residential unit supply, track build out, estimate unit timing, and monitor Provincial residential supply obligations.

It is important to note that none of the expansion lands that were subject to the Provincial modifications of Official Plan Amendment 119 are included in the supply, neither are the updated supply counts for the Fergus South Secondary Plan Area or any lands Designated Future Development. Once these matters are finalized, they will be incorporated into the supply and are anticipated to have an upward impact on unit supply and unit mix.

Supply Categories

County Planning Staff track local and County development applications. Generally, as applications move across the supply categories from vacant to registered units, the supply becomes more certain and the availability of the units more imminent.

Table 1 – Residential Supply Categories

Category	Description
Vacant Designated	Unit potential on vacant designated Residential lands that are not subject to planning applications, and potential urban and rural consents.
Applications Under Review	Potential units in planning applications located on residential lands that are under review.
Draft Approved or Provisional	Units in draft approved plans of condominium or subdivision; or applications that are provisionally approved by the Director of Planning and/or Committees/Councils.
Registered	Potential units in registered plans of subdivision. Vacant lots of record i.e. infill lots in urban areas, vacant sites zoned for multi-residential development and vacant lots in the countryside that are 10 acres or less in area.

Housing Classification Summary

Within the Residential Inventory the County tracks available unit supply across inventory records throughout the County. Below is a summary of how the County classifies housing structures in the Residential Inventory. The housing structure types have been categorized to align with Statistics Canada housing data and is consistent with the Provincial Land Needs Assessment (LNA) methodology for the Greater Golden Horseshoe, 2020. The County tracks potential units across the Low, Medium, and High-density categories.

Table 2 – Housing Density Classification Summary

Housing Type	Density Category
Single-Detached	Low
Semi-Detached	Low
Duplexes, Triplexes, fourplexes	Medium
Row/Townhouses/Stacked Townhomes	Medium
Apartments*	High

*Additional Residential Units (ARUs) are classified as high density; however the inventory does not track potential creation of these units given the irregularity in uptake. Building Permit analysis tracks the actual construction of ARUs across the County and is discussed later in this report.

4.0 Provincial Policy Statement (PPS) Requirements

Section 1.4.1 of the PPS directs planning authorities to provide for an appropriate range and mix of housing options and densities. This includes maintaining at all times the ability to accommodate long-term residential growth for a minimum of 15 years and short-term residential growth for a minimum of 3 years. This section measures the County’s ability to meet these requirements.

Short-Term (3-Year) Supply

The PPS requires municipalities to maintain at all times a minimum three-year supply of residential land, appropriately zoned to accommodate residential intensification or redevelopment and lands in draft approved and registered plans of subdivision. This land is readily available to the market to meet new housing demand without any major servicing constraints. The short-term residential land supply includes lands within the Draft Approved and Registered categories.

As depicted in Table 3 below, as of December 31, 2023, approximately 5,711 residential units are currently zoned for residential purposes across the Registered and Draft Approved supply categories in the urban and rural areas. This represents an approximate 8-year supply of units based on the total forecasted annual 730 units/year needed across the County to meet the total 2051 household forecast from 2021.

Looking at the urban supply of units only, there are approximately 5,114 units across the Registered and Draft Approved supply categories. This represents an approximate 8-year supply of units based on an annual of 657 units/year needed to meet the 2051 urban household forecast. A further analysis of the urban short-term supply shows approximately 543 units (11%) are located within the Built Boundary (BB) of the County’s urban centres and, 4,571 units (89%) located in the Designated Greenfield Area (DGA). A larger share of growth occurring in the DGA is not unexpected and aligns with the findings in our growth management work. The unit mix of the urban supply is skewed towards lower density unit types such as single and semi-detached units at 60%, while we see approximately 29% in the medium density category and 11% in the high-density category.

The County of Wellington currently exceeds the 3-year unit supply requirement of the Provincial Policy Statement for Draft Approved and Registered units.

Table 3 - Short-Term Vacant Residential Unit Supply in Wellington County, December 31, 2023

(Source: County of Wellington Residential Inventory, Building Permit Database)

Status and Unit Density	Units in the Built Boundary (BB)	Units in the Designated Greenfield Area (DGA)	Total Urban Unit Potential	Total Rural Unit Potential	Total Units
Draft Approved	73	3,345	3,418	190	3,608
<i>Low</i>	38	2,125	2,163	190	2,353
<i>Medium</i>	35	1137	1,172	0	1,172
<i>High</i>	0	83	83	0	83
Registered	470	1,226	1,696	407	2,103
<i>Low</i>	168	519	687	399	1,086
<i>Medium</i>	89	403	492	0	492
<i>High</i>	213	304	517	8	525
County Total	543	4,571	5,114	597	5,711
(%)	11%	89%	90%	10%	100%

Long-Term (15-Year) Supply

The PPS requires municipalities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years. Growth is to be accommodated through residential intensification, redevelopment, and if necessary, lands that are designated and available for residential development. In our case, the long-term residential land supply includes lands across all of the Residential Inventory supply categories.

The term designated and available is a defined term in the PPS as:

“means lands designated in the official plan for urban residential use. For municipalities where more detailed official plan policies (e.g. secondary plans) are required before development applications can be considered for approval, only lands that have commenced the more detailed planning process are considered to be designated and available for the purposes of this definition.”

For purposes of the PPS definition of “designated and available”, the County generally includes lands that are vacant and designated for residential development in the long-term supply. Much of the long-term supply is included in the designated greenfield area and requires more detailed planning applications to support residential build out. Additional lands included in the supply are vacant and underutilized sites that have the potential to accommodate future residential development within the built boundary.

As depicted in Table 4 below, as of December 31, 2023, approximately 13,883 residential units are available over the long term in the urban and rural areas. This represents approximately a 19-year supply of residential units available through residential intensification, redevelopment, and lands designated and available for residential development based on the total forecasted annual 730 units/year needed across the County to meet the total 2051 household forecast from 2021.

Looking at the urban supply only, there are approximately 12,898 units available in the long-term supply. This represents an approximate 20-year supply of units based on an annual 657 units/year needed to meet the 2051 urban household forecast. Further analysis of the urban unit supply shows approximately 1,866 units (14%) are accommodated within built boundaries (BB) of urban centres in the County and 11,032 (86%) are accommodated in the County’s Designated Greenfield area (DGA). The unit mix of the long-term urban supply is skewed towards lower density unit types such as single and semi-detached units at 62%, while we see approximately 27% in the medium density category and 10% in the high-density category.

The County of Wellington’s long-term supply exceeds the 15-year supply requirement of the Provincial Policy Statement.

Table 4- Long-Term Vacant Residential Unit Supply in Wellington County, December 31, 2023

(Source: Wellington County Residential Inventory, Building Permit Database)

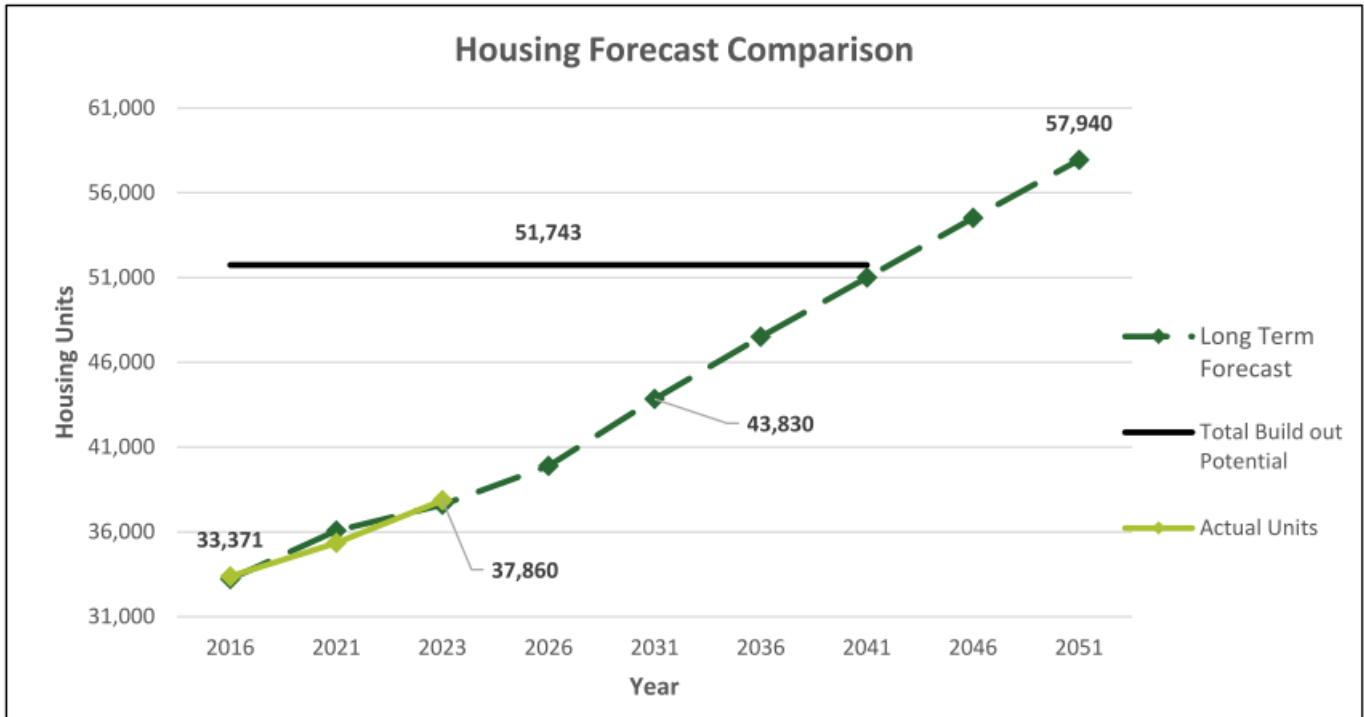
Status and Density	Units in the Built Boundary (BB)	Units in the Designated Greenfield Area (DGA)	Total Urban Unit Potential	Total Rural Unit Potential	Total Unit Potential
Vacant Designated	609	3,549	4,158	338	4,496
<i>Low</i>	378	2,581	2,959	338	3,297
<i>Medium</i>	197	631	828	0	828
<i>High</i>	34	337	371	0	371
Application Under Review	714	2,912	3,626	50	3,676
<i>Low</i>	252	1,609	1,861	50	1,911
<i>Medium</i>	166	1,128	1,294	0	1,294
<i>High</i>	296	175	471	0	471
Draft Approved	73	3,345	3,418	190	3,608
<i>Low</i>	38	2,125	2,163	190	2,353
<i>Medium</i>	35	1,137	1,172	0	1,172
<i>High</i>	0	83	83	0	83
Registered	470	1,226	1,696	407	2,103
<i>Low</i>	168	519	687	399	1,086
<i>Medium</i>	89	403	492	0	492
<i>High</i>	213	304	517	8	525
County Total	1,866	11,032	12,898	985	13,883
(%)	14%	86%	93%	7%	100%

5.0 2051 Household Forecast Comparison

The County of Wellington is in the outer ring of A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019. Through the Growth Plan, the Province has forecasted and allocated population and household growth to the County until 2051. The County is required to meet these Provincial forecasts and we recently completed a series of growth management studies to allocate this growth to our member municipalities and identify long-term land needs. As part of the Planning Department’s regular monitoring, we compare our vacant unit supply and building permit data to our long-term forecast to see how housing growth is tracking.

Chart 1 - Long-Term Housing Forecast Comparison

(Source: Wellington County Residential Inventory, Building Permit Database & Growth Tracking Model)



Looking at Chart 1 above, we see that housing development trends since 2016 have tracked relatively well to forecasted housing growth. This trend continued in 2023 where we achieved 37,860 total housing units which is on track with the forecast. When we compare the County’s total build out potential (existing units + vacant unit supply) against the long term 2051 household forecast, we see that we currently have enough supply available to sustain growth until approximately 2041.

It is important to note that additional unit supply will be added to the Residential Inventory through upcoming urban boundary expansions to satisfy recommendations of the County’s land needs assessment. These expansions are intended to make enough land available for the County to meet its 2051 population and household forecasts as required by the Provincial Growth Plan.

6.0 Subdivision and Condominium Applications

The County of Wellington is an Upper-tier Municipality and is the approval authority for all subdivision and condominium applications in the County. Subdivision and condominium applications are the primary driver of new unit supply in our Residential Inventory and building permit tracking and provide a good indication of unit supply and mix that will be available in the future. It is important to note while the County approves these applications member municipalities are instrumental in the consultation, review, and final design of these developments.

The County’s Residential Inventory includes all active residential subdivision and condominium applications, the table below provides a snapshot of applications the County received in 2022 and 2023 and outlines their inventory status as of December 31, 2023, as well as the number of proposed units.

Table 5 - 2022 & 2023 Subdivision and Condominium Applications, December 31, 2023

(Source: Wellington County applications)

Year	Application	Municipality	Inventory Status	Units			Total	
				LOW	MED	HIGH		
2022	23T-22001**	Centre Wellington	Draft Approved	-	-	-	-	
	23T-22002	Erin	App. Under Review	197	91		288	
	23T-22003	Erin	App. Under Review	194			194	
	23T-22004	Erin	App. Under Review	215	225		440	
	23T-22005	Centre Wellington	App. Under Review	155	131		286	
	23T-22006	Wellington North	Draft Approved		35		35	
	23CD-22001**	Centre Wellington	Draft Approved	118			118	
	23CD-22002	Centre Wellington	Registered			136	136 (b)	
	23CD-22003	Centre Wellington	App. Under Review	12	37		49	
	Total				891	519	136	1,546
	Total Unit Mix Percentage (%)				58%	34%	8%	100%
	Rural Unit Total							118
2023	23T-23001	Wellington North	App. Under Review		34		34	
	23T-23002**	Puslinch	App. Under Review	23			23	
	23T-23003	Erin	App. Under Review	445	353		798	
	23T-23004	Guelph-Eramosa	App. Under Review	4			4	
	23T-23005**	Centre Wellington	App. Under Review	107			107	
	23T-23006**	Guelph-Eramosa	App. Under Review	16			16	
	23CD-23002	Minto	Draft approved		10		10(b)	
	23CD-23003	Centre Wellington	App. Under Review			45	45	
	23CD-23004	Centre Wellington	App. Under Review			32	32	
	23CD-23005	Centre Wellington	App. Under Review		31		31	
	Total				595	428	77	1,090
	Total Unit Mix Percentage (%)				54%	39%	7%	100%
Rural Unit Total							146	

*(b) represents units that have had building permits issued.

**Applications in the Rural Area

Residential application levels were stable between 2022 and 2023 with the County receiving a total of 9 subdivision and condominium applications in 2022 and 10 in 2023. While application levels remained consistent, the total number of residential units across the applications decreased in 2023 by 456 units. Despite this decrease we observed an increase in the percentage of units in the medium density category (e.g. townhomes) with a corresponding decrease in the number of units being created in the low-density category. When comparing the 2022 and 2023 unit mix against the Long-term vacant supply unit mix, we are seeing a much stronger presence of medium density development proposed.

7.0 Residential Building Permit Activity

Between 2008-2023, Member Municipalities have issued building permits for the creation of approximately 7,617 residential units. This represents an annual average of 476 units/ year. The highest number of residential units achieved in this timeframe was in 2022 with 853 permits issued. In 2023 we saw 592 residential building permits issued. As noted above, our recent growth management work forecasted an average of 730 residential units annually from 2021 to achieve our forecasted household targets for 2051.

Table 6 - Residential Units Issued Through Building Permits, In Wellington between 2008-2023

(Source: County of Wellington Building Permit Database)

Year	Single	Semi	Medium	High	Total
2008	332	10	38	12	392
2009	182	10	31	55	278
2010	205	8	23	58	294
2011	221	24	22	77	344
2012	256	14	37	93	400
2013	172	12	36	30	250
2014	216	6	49	55	326
2015	290	6	59	76	431
2016	419	0	147	99	665
2017	410	16	105	20	551
2018	258	19	46	36	359
2019	390	20	125	37	572
2020	342	20	57	79	498
2021	381	77	132	224	814
2022	481	110	178	84	853
2023	254	103	197	38	592
Total	4,809	455	1,282	1,073	7,619

When we analyze the historical building permit information, we see that approximately 70% of the units built since 2008 were low density units, with approximately 30% falling into the medium and high-density building typologies. However, if we look at more recent horizon between 2021-2023, we are seeing a shift in building permits toward a denser building typology with 62% of units considered low density and 38% considered to be in the medium and high-density categories. Our expectation is to continue to see a shift towards more dense forms of housing in the County resulting in a more diversified housing stock.

Table 7 below provides a more detailed look at the 2023 residential building permits and a breakdown of type of development and where it occurred. As expected, most of the residential permits 504 or 85% were issued in an urban setting with 88 or 15% issued in the rural area. The unit mix of the urban permits continued to see a shift towards the denser building typologies, with 357 (58%) low density, 197 (39%) medium density, and 38 (8%) high density permits issued.

An important assessment of the 2023 urban building permits is how the County is tracking towards its residential intensification target of 20%. The intensification target is measured based on the number of residential units locating annually within the identified built-up area delineated in our primary urban centres. In 2023, the County achieved its residential intensification target with 183 or 31% of all residential permits issued within the identified built boundary of our primary urban centres.

Table 7 - 2023 Residential Building Permits

(Source: County of Wellington Building Permit Database)

Municipality and Density Category	Permits Issued in the Built Boundary (BB)	Permits issued in the Designated Greenfield Area (DGA)	Total Urban Unit Permits	Total Rural Unit Permits	Total Permits
Centre Wellington	24	236	260	8	268
<i>Low</i>	6	160	166	8	174
<i>Medium</i>	18	76	94	0	94
<i>High</i>	0	0	0	0	0
Town of Erin	0	1	1	16	17
<i>Low</i>	0	1	1	16	17
<i>Medium</i>	0	0	0	0	0
<i>High</i>	0	0	0	0	0
Guelph/Eramosa	1	0	1	16	17
<i>Low</i>	1	0	1	16	17
<i>Medium</i>	0	0	0	0	0
<i>High</i>	0	0	0	0	0
Mapleton	1	4	5	16	21
<i>Low</i>	1	4	5	16	21
<i>Medium</i>	0	0	0	0	0
<i>High</i>	0	0	0	0	0
Town of Minto	3	15	18	7	25
<i>Low</i>	3	9	12	7	19
<i>Medium</i>	0	6	6	0	6
<i>High</i>	0	0	0	0	0
Wellington North	154	65	219	14	233
<i>Low</i>	37	47	84	14	98
<i>Medium</i>	79	18	97	0	97
<i>High</i>	38	0	38	0	38
Puslinch	0	0	0	11	11
<i>Low</i>	0	0	0	11	11
<i>Medium</i>	0	0	0	0	0
<i>High</i>	0	0	0	0	0
County Total	183	321	504	88	592
<i>Low</i>	48	221	269	88	357
<i>Medium</i>	97	100	197	0	197
<i>High</i>	38	0	38	0	38

Additional Residential Units (ARUs)

The County Official Plan has been continually updated to align with the most current Provincial policy changes related to the establishment of ARUs on residential properties. Currently the Official Plan permits up to two ARUs on a property containing a single detached dwelling, semi-detached dwelling or rowhouse in the urban or rural areas, subject to meeting specific criteria and municipal zoning provisions. Permissions for ARUs have been in the County Official Plan since June 2016 and modified to keep current with legislative changes related to ARUs.

Table 8 below outlines County tracking of ARUs through building permit data supplied by our member municipalities. Since 2016, building permit tracking related to ARUs has shown 322 permits have been issued in the County. County tracking only accounts for ARUs that are identified through municipal permitting and may therefore undercount the actual amount of ARUs that exist in our communities.

Table 8 - Additional Residential Units Created In Wellington between 2016-2023

(Source: County of Wellington Building Permit Database)

Year	2016	2017	2018	2019	2020	2021	2022	2023	Total
Centre Wellington	19	31	28	26	27	20	29	48	228
<i>Urban</i>	18	29	27	25	23	13	22	36	193
<i>Rural</i>	1	2	1	1	4	7	7	12	35
Erin	2	2	1	0	1	0	0	0	6
<i>Urban</i>	0	0	0	0	0	0	0	0	0
<i>Rural</i>	2	2	1	0	1	0	0	0	6
Guelph/Eramosa	1	2	1	4	3	4	12	5	32
<i>Urban</i>	1	0	0	0	1	0	4	1	7
<i>Rural</i>	0	2	1	4	2	4	8	4	25
Mapleton	0	0	2	0	0	1	2	12	17
<i>Urban</i>	0	0	2	0	0	0	0	0	2
<i>Rural</i>	0	0	0	0	0	1	2	12	15
Minto	1	1	0	1	1	4	3	1	12
<i>Urban</i>	1	1	0	1	1	2	3	1	10
<i>Rural</i>	0	0	0	0	0	2	0	0	2
Puslinch	0	1	0	0	2	0	0	0	3
<i>Urban</i>	0	0	0	0	0	0	0	0	0
<i>Rural</i>	0	1	0	0	2	0	0	0	3
Wellington North	1	1	1	0	0	7	6	8	24
<i>Urban</i>	1	1	1	0	0	5	3	5	16
<i>Rural</i>	0	0	0	0	0	2	3	3	8
County Total	24	38	33	31	34	36	52	74	322
<i>Urban</i>	21	31	30	26	25	20	32	43	228
<i>Rural</i>	3	7	3	5	9	16	20	31	94

In 2023 permits for 74 Additional Residential Units were issued in the County. In reviewing the ARU building permit data, we see that there has been a consistent level of interest in ARU construction since 2016 with an average of 40 permits per year. Interestingly, we note that there has been an increase of ARU construction in the rural area since 2021. This is likely related to several factors including, municipal implementation of the ARU provisions in zoning, the pandemic, affordability, and recent attention by the Provincial Government related to this form of housing.

8.0 Summary

Based on the above analysis for 2023, the County:

- 1) Has a supply of approximately 13,883 vacant residential units across the Residential Inventory.
- 2) Has 5,711 vacant units in the Draft Approved and Registered applications.
- 3) Has enough land designated for residential growth to meet the 3-year and 15-year supply as required by Section 1.4.1 of the Provincial Policy Statement, 2020.
- 4) Received 6 subdivision and 4 condominium applications proposing 1,090 residential units.
- 5) Had 592 residential building permits issued by our member municipalities with a unit mix of 357 (60%) low density, 197 (33%) medium density and 38 (6%) high density building types. While low density housing was still strong the 2023 permits continued the trend towards more dense forms of housing consistent with recent years.
- 6) Had 74 permits issued by our member municipalities for Additional Residential units. This is approximately 322 Additional Residential Units constructed in the County since 2016.
- 7) Achieved its 20% intensification with member municipalities issuing 31% of all building permits (183 permits in total) within the Built Boundaries of our primary urban centres.

9.0 Strategic Action Plan:

This report relates to the following objectives and priorities in the County's Strategic Action Plan:

- Remain open and transparent in its decision-making processes.

10.0 Recommendation:

That the 2023 Residential Development Monitoring Report be received for information.

That the County Clerk circulate this report to Member Municipalities for information.

Respectfully submitted,



Jameson Pickard, B. URPL, MCIP, RPP
Senior Policy Planner



Paul Barson
GIS Programme Manager

Appendix A 2023 Residential Highlights Infographic

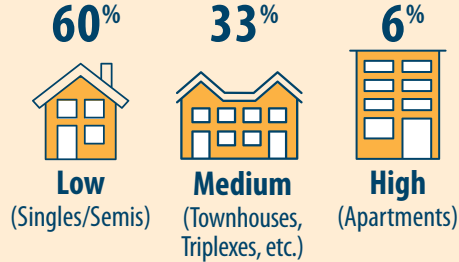
2023 Residential Highlights

Building Permits



592 2023 Residential Building Permit issued

Unit mix of permits



74 2023 Additional Residential Unit Permits issued



322 Additional Residential units constructed since 2016

20% Annual intensification target met **31%** of 2023 permit issued in the Built Boundary.



Residential Supply



13,883

Total # of units in Residential supply

	Provincial Policy Requirement	Wellington County Supply	Target Met
3 Year supply	2,190	5,711	✓
15 Year supply	10,950	13,883	✓

*730 units required annually from 2021 to 2051 to achieve 2051 household forecast.

Long Range Housing Forecast



2023 Household are On-Track!

