

**Kitchener Growth Management Strategy  
Annual Monitoring Report 2023**

## **EXECUTIVE SUMMARY**

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In 2009, Kitchener approved its Growth Management Strategy (KGMS) in support of the City's Strategic Plan. Kitchener is expected and planned to accommodate a relatively significant amount of residential and employment growth by 2051. The City has also been assigned a housing target by the Province to achieve the building of 35,000 homes in Kitchener by 2031 – known as Kitchener's municipal housing pledge. As part of tracking progress on Kitchener's housing pledge, the Province requires municipal planning data to be reported on a quarterly and annual basis.

Kitchener tracks and monitors specific growth data in a dynamic manner. A snapshot of the data is contained within this report.

The results of the 2023 growth management data continue to be encouraging.

Kitchener is on track to achieve and potentially exceed its 2031 housing target. The Province's current reporting on Kitchener's housing target shows that Kitchener not only achieved but exceeded its 2023 housing target by 39%.

The number of residents and jobs per hectare (RJs/ha) in the Urban Growth Centre (Downtown) is 220 RJs/ha, surpassing the provincially mandated minimum target of 200 RJs/ha by 2031, and approaching the City's higher Official Plan minimum target of 225 RJs/ha by 2031. Further, the estimated density of the Queen and Frederick Protected Major Transit Station Area is 185 RJs/ha, exceeding its density target of 160 RJs/ha.

The City's 2023 intensification level was 69% and 5-year average intensification level is 61% exceeding our minimum intensification target (60%).

In 2023, building permits were issued for a total of 3,985 new residential units –our highest figure on record. 77% of new residential units developed in 2023 were in the form of multiple dwellings - a substantial increase compared to that in 2022 (40%) and highest number on record. Development of additional dwelling units (e.g. duplex dwelling units) has seen a considerable increase compared to historical averages. Despite current market conditions, Kitchener saw record numbers of building permits issued.

It is anticipated that the City's growth management program, including the strategy, framework and dynamic tracking and monitoring system, will be updated in future years to reflect: changes to provincial legislation; updates to the Region's Official Plan; and, subsequently the City's Official Plan review which will follow.

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## **1 EVOLUTION OF GROWTH MANAGEMENT**

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In the 1960s, population growth and expectations for the future in Kitchener were soaring. The population of 100,000 was expected to more than double in 20 years. Kitchener proactively undertook and participated in several long-range studies aimed at guiding the future growth of Kitchener and the surrounding area.

One of these studies from 1964 entitled, *Kitchener 2000 – A Regional Concept*, suggested an approach for a 'Staging of Development' program. It was thought that given the predicted rapid growth, a logical economic means for developing the city was needed that would closely relate to the financial ability of the City to provide infrastructure services for an area. Following work on a new Official Plan in 1968, annual Lot Levies Reports were prepared. This report coordinated the provision of engineering services with the timing of approving new subdivisions. At the time, the annual Council-approved report led the way as an effective tool for managing growth and after several years the process became known as the 'Staging of Development'. The Staging of Development paved the way for coordinating subdivision growth in Kitchener. It was nearly 30 or more years later that many other municipalities in Ontario implemented a formal staging program.

As with all processes, the need to evolve arises. After 40 years, the growth management landscape significantly changed. Kitchener became part of a provincial Growth Plan for the Greater Golden Horseshoe. The Region of Waterloo (the Region) adopted a Regional Growth Management Strategy (RGMS). Social, environmental and economic objectives became more complex. These changes saw the Staging of Development program evolve and make way for the new Kitchener Growth Management Strategy (KGMS), along with its implementation tools.

Approved by Kitchener Council in 2009, the KGMS provides a framework for planning where and how future residential and employment growth can be accommodated in Kitchener while positively contributing to the City's quality of life. The goals and actions outlined in the KGMS support the Growth Plan for the Greater Golden Horseshoe, 2006 (the Growth Plan, 2006) and the RGMS. One of the goals (Goal 6) of the KGMS introduced an ongoing growth management program to manage growth-related change in an effective and coordinated manner. A biannual Kitchener Growth Management Plan (KGMP) and an annual Growth Management Monitoring Report (Monitoring Report) were identified as important components for the growth management program.

The KGMP establishes priority levels for development and infrastructure projects for each growth area within the City. It includes the prioritization and allocation of resources towards completing initiatives that are required to move lands from the draft approval stage to registration, construction and developing complete communities.

The Monitoring Report, historically, has tracked the supply of development, and the achievement of intensification and density targets for Kitchener. Monitoring Reports

have been prepared and presented to Council and the development industry since 2010. The previous Monitoring Report iterations are available on the [City's Growth Management webpage](#). These Monitoring Reports have included a summary of *Planning Act* applications, residential development rates within the delineated Built-up Area (BUA) and the Designated Greenfield Area (DGA), and potential capacity to accommodate growth in the City.

Kitchener has been on the leading edge with respect to the ability to track and monitor specific growth data in a dynamic manner. As part of Kitchener's ongoing growth management program the intent is to continually refine the data, improve the dynamic capabilities and provide information to help support numerous corporate studies and infrastructure projects.

The Province implemented [Ontario Regulation 73/23 - Municipal Planning Data Reporting](#) in April of 2023. The regulation complements the Province's initiative of developing standards and achieving consistency for the reporting of data required for development applications. The City of Kitchener is required, under this regulation, to report *Planning Act* application information on a quarterly basis and additional information on an annual basis. The City of Kitchener has submitted quarterly *Planning Act* application data to the Province for each quarter in 2023.

This is the 14<sup>th</sup> edition of the Monitoring Report and it has been updated from the previous iterations. The updates reflect the recent changes to provincial legislation and to the Regional Official Plan (ROP). It includes statistics for Protected Major Transit Station Areas and other primary intensification areas that were established in Kitchener's 2014 Official Plan. This report also tracks progress towards the City of Kitchener's [housing pledge](#) that was approved in response to a request from the Minister of Municipal Affairs and Housing, on March 20, 2023 supporting the building of 35,000 homes in Kitchener by 2031.

## 2 MUNICIPAL HOUSING TARGET

In October 2022, the Minister of Municipal Affairs and Housing provided individual housing targets for 29 municipalities across Ontario and requested that each municipality submit a municipal housing pledge to the Province. 21 additional municipalities were assigned housing targets in 2023 as part of Ontario’s plan to build at least 1.5 million homes by 2031.

On March 20, 2023, the City of Kitchener approved a housing pledge supporting the building of 35,000 homes in Kitchener by 2031. Further annual targets were assigned as each municipality’s proportion of the overall 1.5 million housing goal and applying that proportion against province-wide annual targets. Table 1 summarizes the annual and overall housing target for Kitchener. These targets are independent from the Growth Plan intensification and density targets.

**Table 1. Annual Housing Target for the City of Kitchener**

Target	2023	2024	2025	2026 & beyond	Total by 2031
<b>Province</b>	110,000	125,000	150,000	175,000	<b>1,500,000</b>
<b>City of Kitchener</b>	2,567	2,917	3,500	4,083	<b>35,000</b>

Note – No housing targets have been assigned for 2022. However, the overall housing target of 35,000 for Kitchener is from 2022 to 2031.

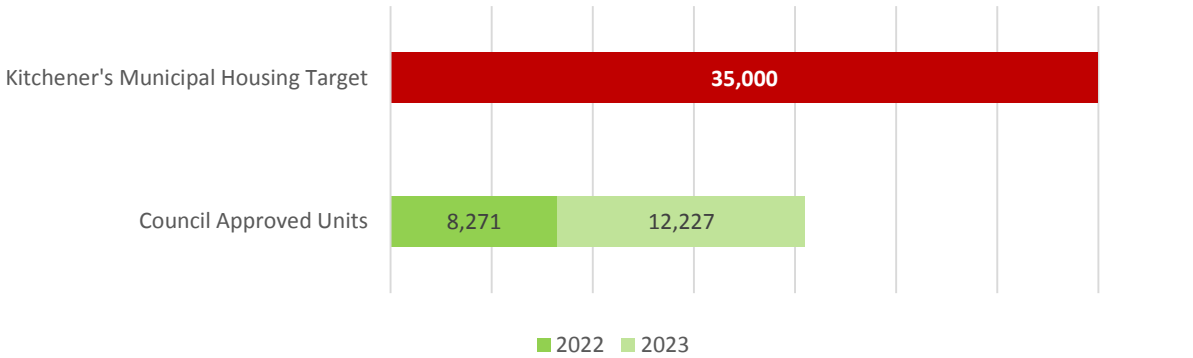
### 2.1 TRACKING PROGRESS ON KITCHENER’S MUNICIPAL HOUSING TARGET

#### 2.1.1 COUNCIL APPROVED UNITS

Plan of subdivisions, Official Plan amendments, Zoning By-law amendments, and Part Lot Control applications require approval by Council. The number of units that are approved by Council indicate how many units are anticipated to be built in the future years. It is important to note that there is a time lag between Council approval and actual development of units. The length of time it takes to get from Council approval to the start of construction varies dramatically and is highly influenced by market conditions.

Figure 1 compares the municipal housing target with the number of units that the Council has approved since 2022. In 2022, Council approved 37 applications with a total of 8,271 units. In 2023, Council approved 65 applications with a total of 12,227 units. A cumulative 20,498 units have been approved since 2022.

**Figure 1. Kitchener’s Municipal Housing Target and Council Approved Units, since 2022**



**2.1.2 RESIDENTIAL DEVELOPMENT RATES**

Figure 2 **Error! Reference source not found.** illustrates the total number of new units for which building permits were issued annually from 2009 to 2023 and a 5-year moving average. In 2022, building permits were issued for a total of 2,303 new residential units. This was a decrease from the previous three years (2019-2021). In 2023, building permits were issued for a total of 3,985 new residential units, the highest number of building permits issued on record. The 5-year moving average shows that the number of building permits issued for new residential units have steadily grown over the years.

**Figure 2. Annual Residential Development Rates in Kitchener, 2009-2023**

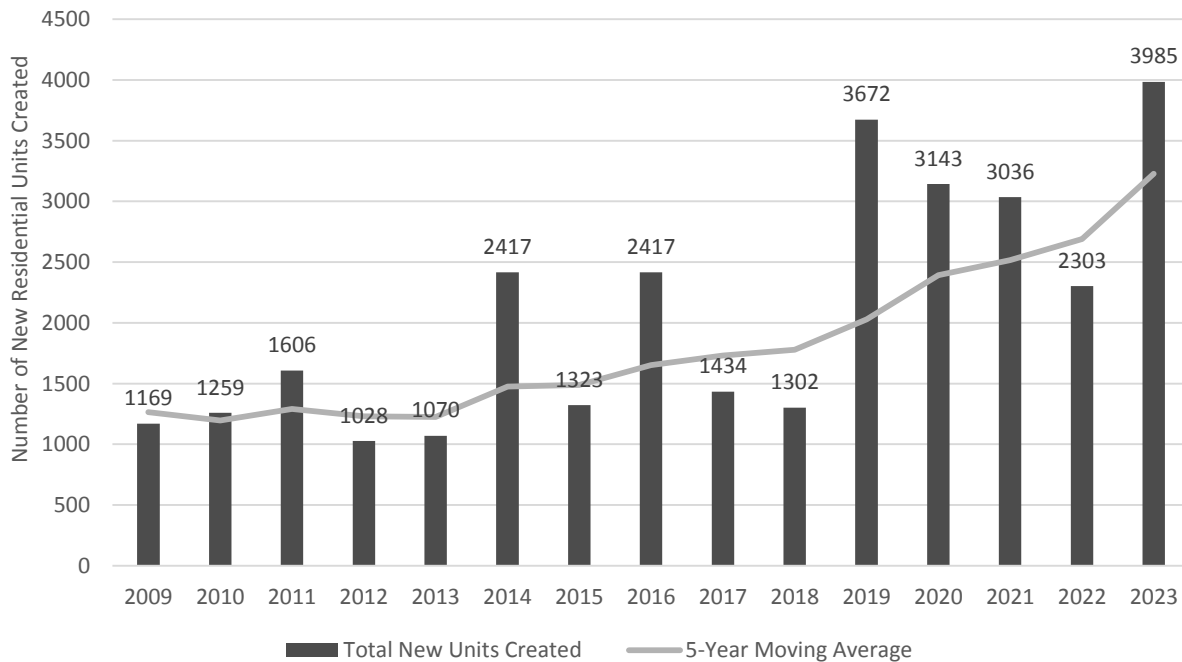


Table 2 **Error! Reference source not found.** provides the number of new units for which building permits were issued by the type of dwelling from 2022 to 2023 and



the average of last 5-years (2019-2023). The development of single detached, semi-detached street townhouse and cluster townhouse dwellings has seen a downturn. However, there has been a steady increase in the development of duplex dwelling units. The development of triplex, and detached ADUs has also seen a considerable increase between 2022 and 2023, since Bill 23 changes were implemented, although the overall numbers for triplex and detached ADUs are still low. Multiple dwellings had a slow 2022 but a considerably strong 2023 with a historic record level of multiple dwelling units for which building permits were issued.

**Table 2. Annual Residential Development Rates by Dwelling Type, 2022-2023**

Dwelling Type	Number of New Residential Units Created		
	2022	2023	5-year average
Single Detached	447	148	407
Semi-Detached	12	7	27
Street Townhouse	298	18	206
Duplex <sup>1</sup>	547	688	423
Triplex <sup>1</sup>	10	29	14
Detached ADU <sup>1</sup>	15	27	16
Cluster Townhouse	48	0	31
Multiple Dwellings <sup>2</sup>	926	3,068	2,111
<b>Total New Units</b>	<b>2,303</b>	<b>3,985</b>	<b>3,228</b>

Notes:

1. In association with single detached, semi-detached and street townhouse dwelling types
2. Includes stacked townhouse dwellings

A further breakdown of multiple dwellings is illustrated in Table 3 **Error! Reference source not found.** In 2023, building permits for six (6) high rise multiple dwellings were issued with a total of 1,906 units. This was up from one (1) high rise multiple dwelling issued in 2022.

**Table 3. Annual Residential Development Rates for Multiple Dwellings, 2022-2023**

Dwelling Type	Number of New Residential Units Created	
	2022	2023
Stacked Townhouse	112 (12%)	423 (14%)
Low Rise Multiple (3 storeys or fewer)	43 (4%)	121 (4%)
Mid Rise Multiple (4 to 8 storeys)	606 (66%)	420 (14%)
High Rise Multiple (9 storeys or higher)	127 (14%)	1,906 (62%)
Additions/Conversions	38 (4%)	198 (6%)
<b>Total Multiple Dwellings</b>	<b>926</b>	<b>3,068</b>

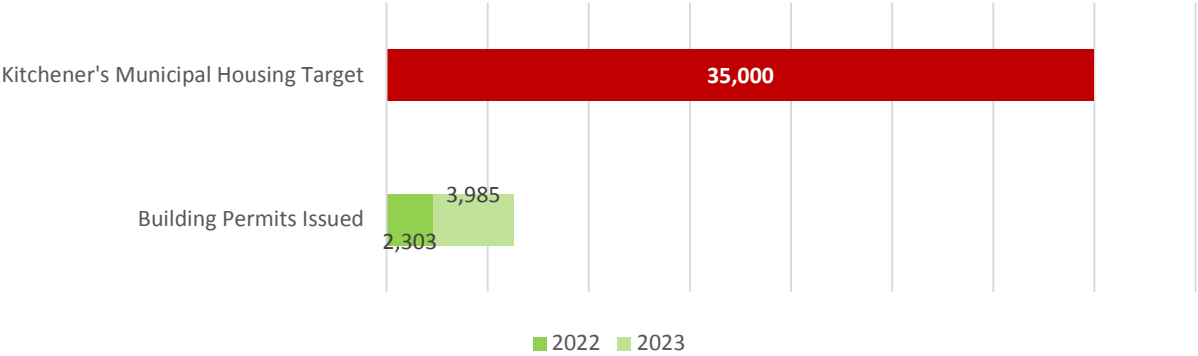
Notes:

- (value) represents percentages of column totals

Figure 3 compares the municipal housing target with the number of units for building permits issued since 2022. In 2022, building permits were issued for 2,303 units. In

2023, building permits were issued for 3,985 units. Building permits have been issued for a total of 6,288 units since 2022. This accounts for 18% of Kitchener’s municipal housing target.

**Figure 3. Kitchener’s Municipal Housing Target and Building Permits Issued, since 2022**

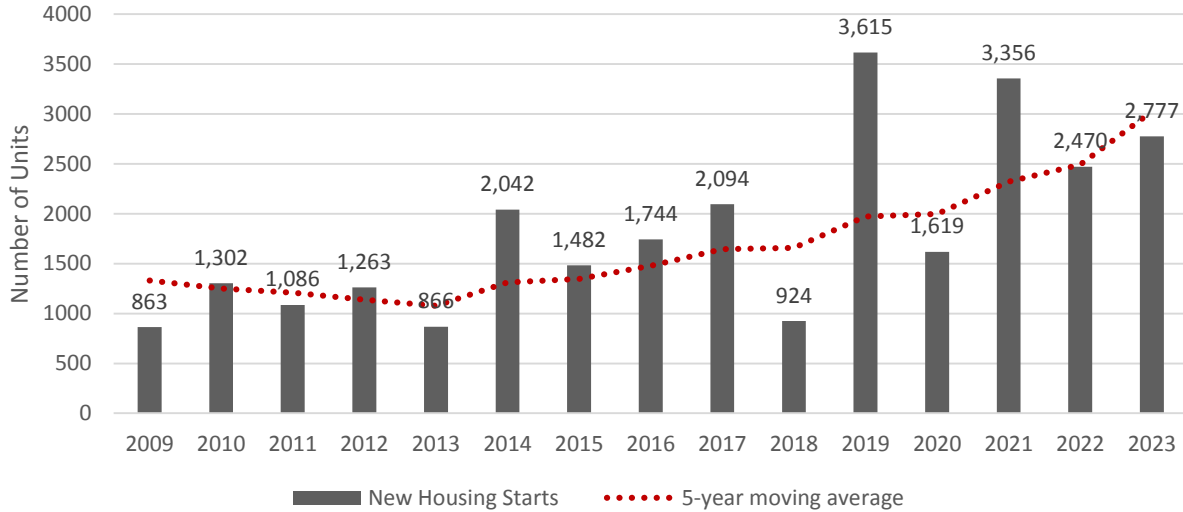


**2.1.3 PROVINCIAL EVALUATION OF THE HOUSING TARGET**

The Province evaluates performance against the housing targets based on housing starts and additional residential units (for example, laneway, garden and basement suites) as provided by the Canada Mortgage and Housing Corporation (CMHC); and other institutional housing types (such as long-term care beds) as provided by the Ministry of Long-Term Care, created in a given calendar year. CMHC defines a housing start as the beginning of construction work on a building. This is usually when the concrete has been poured for the footings or basement.

Figure 4 illustrates the number of new housing starts annually since 2009 and 5 year moving average. The trend generally follows the number of building permits that are issued in Kitchener.

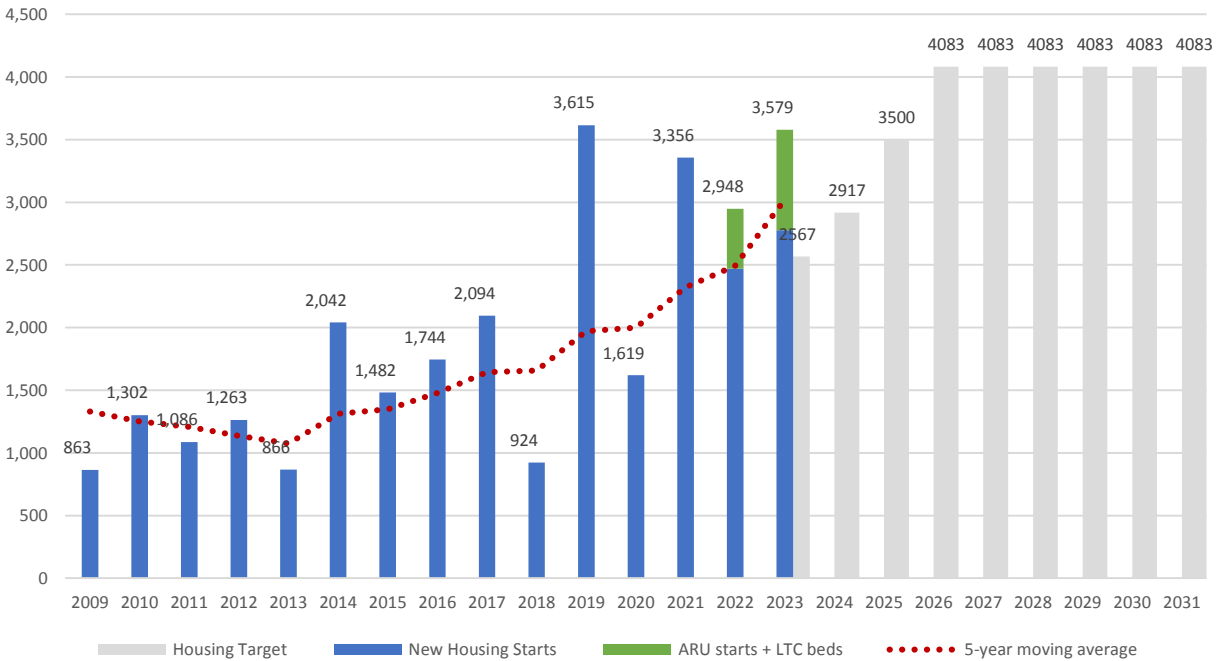
**Figure 4. New Housing Starts as per CMHC, 2009-2023**



To evaluate performance against the municipal housing target, the Province has started reporting a cumulative number of additional residential units (ARUs - this is similar to Kitchener’s nomenclature of additional dwelling units and duplexes) and new or upgraded beds in long-term care homes. These have not been reported previously and are not available for the previous years at the time of writing this report.

Figure 5 illustrates new housing starts from 2009 to 2023, ARU starts and long-term care beds in 2022 and 2023, a 5-year moving average of total units, and annual housing targets from 2023 to 2031. A multi-year average provides a better indication of progress towards the housing target. The compounded annual growth rate of the 5-year moving average for a 5 year period (2019 to 2023) is 9%. Further, the 2023 data shows that Kitchener not only achieved its housing target but exceeded it by 39%. This indicates that Kitchener is on track to achieve and potentially exceed its assigned housing target and receive provincial Building Faster Fund.

**Figure 5. New Housing and ARU Starts, Long-term Care Beds, and Annual Housing Target for Kitchener, 2009-2031**

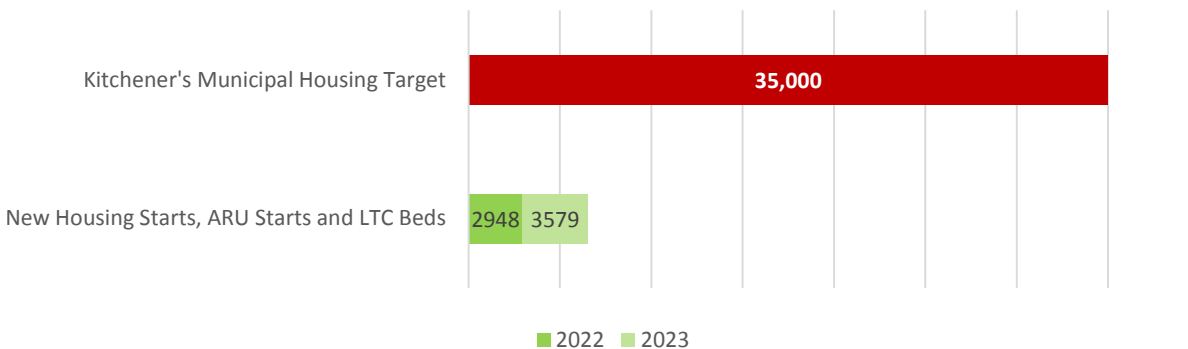


**Notes:**

- Total units in the figure above includes number of new housing and ARU starts as provided by CMHC, and new or upgraded beds in long-term care homes as provided by the Ministry of Long-Term Care for 2022 and 2023 only. ARU starts and new or upgraded beds in long-term care homes is not available for years prior to 2022.

Figure 6 **Error! Reference source not found.** illustrates Kitchener’s progress towards its provincially assigned housing target of 35,000 by 2031. Since 2022, Kitchener has seen a total of 6,527 units created, which includes new housing starts as reported by CMHC, additional residential units, and new or upgraded beds in long-term care homes. This represents approximately 18.6% of the housing target. 28,473 units are needed to meet the housing target by 2031, an average of approximately 3,560 units every year.

**Figure 6. Kitchener’s progress towards the Municipal Housing Target, 2023**



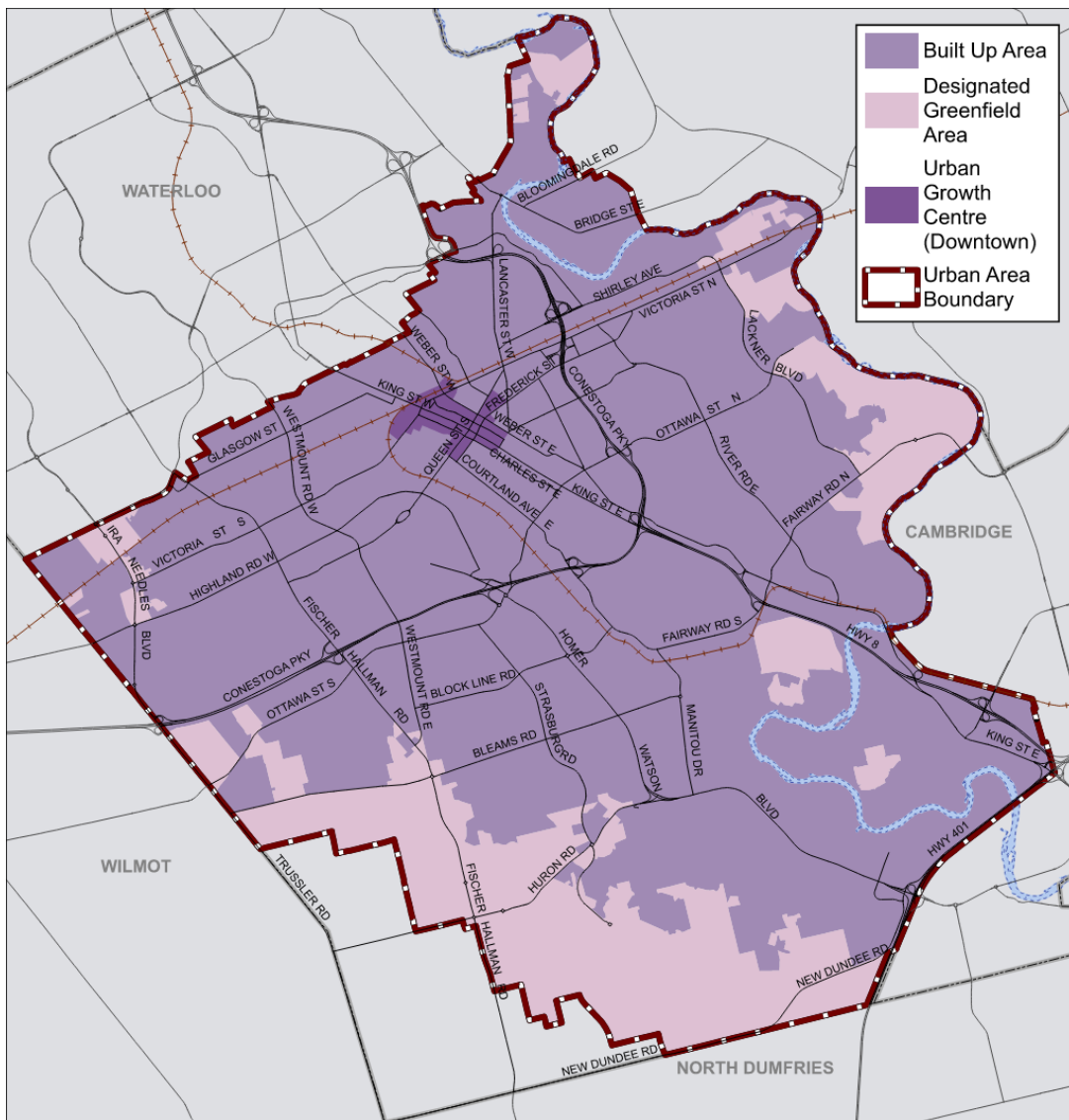


### 3 GROWTH FORECASTS & TARGETS

#### 3.1 INTENSIFICATION TARGETS

The Growth Plan, 2006 defined the limits of the Region’s Urban Area, including the delineated Built-Up Area (BUA), and the Designated Greenfield Area (DGA). Figure 7 shows the Urban Area Boundary, the BUA, and the DGA for Kitchener. It should be noted that Kitchener’s Urban Area Boundary and DGA as established in the Regional Official Plan is subject to change pending a decision on Bill 162, Get it Done Act which was tabled in February 2024.

**Figure 7. Urban Area Boundary, Built-up Area, and Designated Greenfield Area for Kitchener**



The Built-up Area (BUA) represents the lands that were developed with urban uses as of 2006 and does not change year over year. Lands within the BUA have been used to implement and measure minimum residential intensification targets. Intensification refers to the development of a property, site or area at a higher density than currently exists. The residential intensification targets have been a key component to create more compact development patterns, promote energy efficiency, provide a greater variety of housing options, and better integrate transit and land use planning.

Kitchener’s and the Region of Waterloo’s residential intensification targets have changed overtime. The 2006 Growth Plan established a minimum residential intensification target of 40% for the Region. The Region’s Official Plan at that time required the achievement of a minimum 45% as the region-wide residential intensification target. The Growth Plan, 2020 revised the region-wide minimum residential intensification target to 50%. Further, through the Region’s Official Plan amendment number 6 (ROPA 6) which brought their Official Plan into conformity with the Growth Plan 2020, established a higher residential intensification target for the Region and specified residential intensification targets for the area municipalities. Kitchener’s minimum residential intensification target is 60% with a total minimum of 31,660 units in the BUA from 2022 to 2051 (Table 4).

**Table 4. Minimum Annual Residential Intensification Target, Kitchener and Region of Waterloo BUA**

	<b>Minimum Annual Residential Intensification Target</b>	<b>Total Minimum Units in the BUA 2022-2051</b>
<b>Kitchener BUA</b>	60%	31,660
<b>Region of Waterloo</b>	<b>61%</b>	<b>71,150</b>

**3.1.1 INTENSIFICATION LEVEL PROGRESS**

Annual residential development rates by dwelling type in the BUA and DGA are indicated for 2022 and 2023 in Table 5. The intensification level in 2022 was 32% and in 2023 was 69%. The City expects to see “spike” (such as in 2023) and “dip” (such as in 2022) years with respect to intensification levels as the timing of multiple dwelling developments can affect the reported development rates in a given year for a municipality the size of Kitchener. As we have seen in recent years, when there is a substantial number of multiple dwelling units created in the BUA, the City’s intensification level is higher.

**Table 5. Annual Residential Development Rates in the BUA and DGA by Dwelling Type, 2022 and 2023**

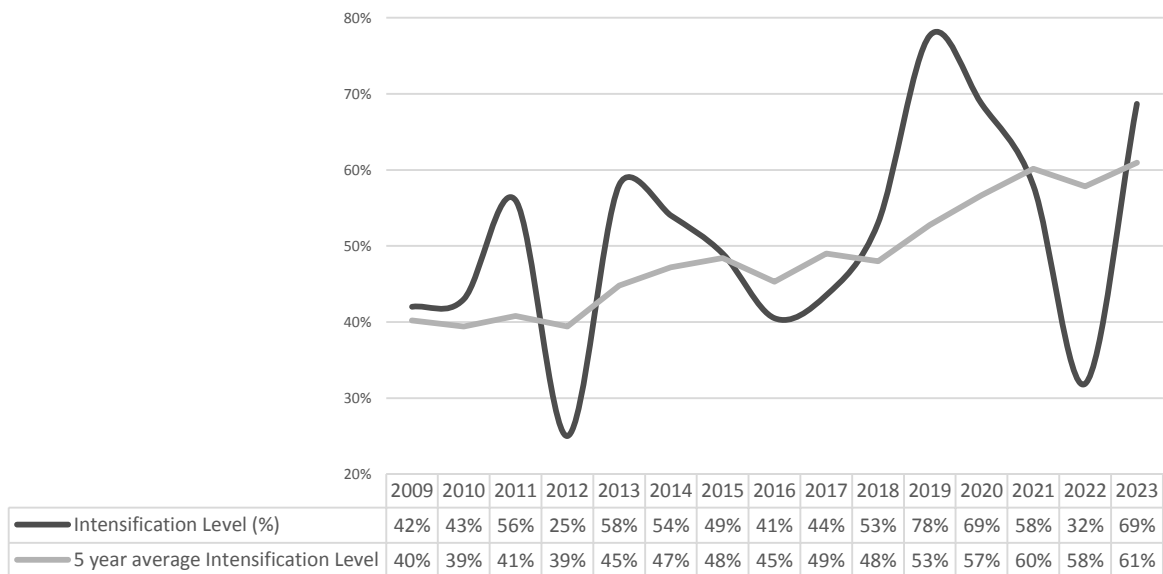
Dwelling Type	2022			2023		
	DGA	BUA	Total	DGA	BUA	Total
Single Detached	423	24	447	137	11	148
Semi-Detached	2	10	12	4	3	7
Street Townhouse	298	0	298	18	0	18
Duplex <sup>1</sup>	211	336	547	356	332	688
Triplex <sup>1</sup>	0	10	10	0	29	29
Detached ADU <sup>1</sup>	1	14	15	1	26	27
Cluster Townhouse	0	48	48	0	0	0
Multiple Dwellings <sup>2</sup>	634	292	926	732	2,336	3,068
<b>Total New Units (3)</b>	<b>1,569 (68%)</b>	<b>734 (32%)</b>	<b>2,303 (100%)</b>	<b>1,248 (31%)</b>	<b>2,737 (69%)</b>	<b>3,985 (100%)</b>

**Notes:**

1. Includes duplex, triplex, detached ADU in association with single detached, semi-detached and street townhouse dwelling types
2. Includes stacked townhouse dwellings

Figure 8 illustrates the historic annual intensification levels and 5-year average intensification levels for the City. A multi-year average provides a better understanding, for growth monitoring purposes, of whether the City is on track to achieve the required intensification level. This continues to indicate that the City is on track to contribute towards, and in some years exceed, the minimum intensification target of 60%.

**Figure 8. Annual Residential Intensification Levels, 2009-2023**

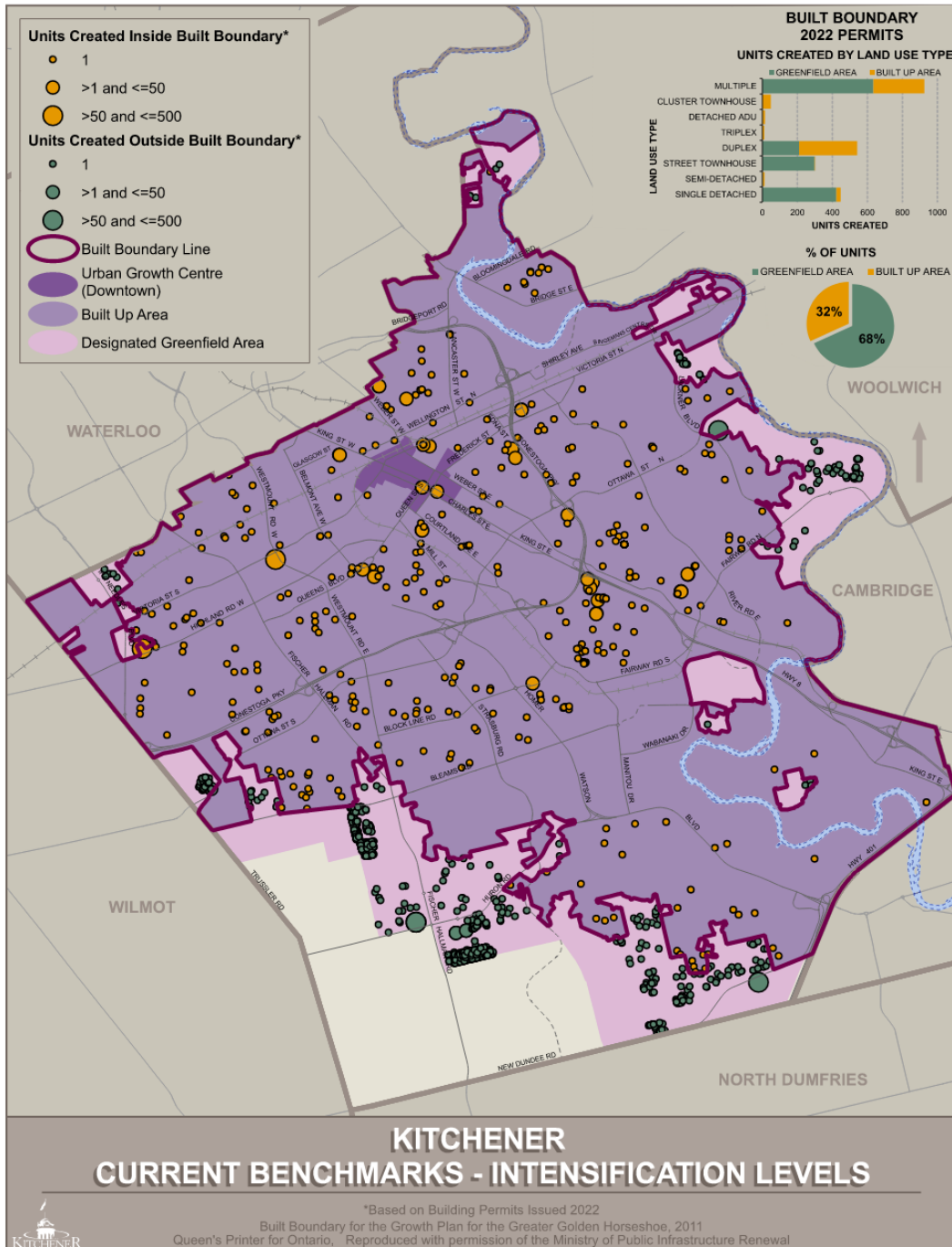


**Error! Reference source not found.** illustrates the location of new units created in 2022 and **Error! Reference source not found.** illustrates the location of new units

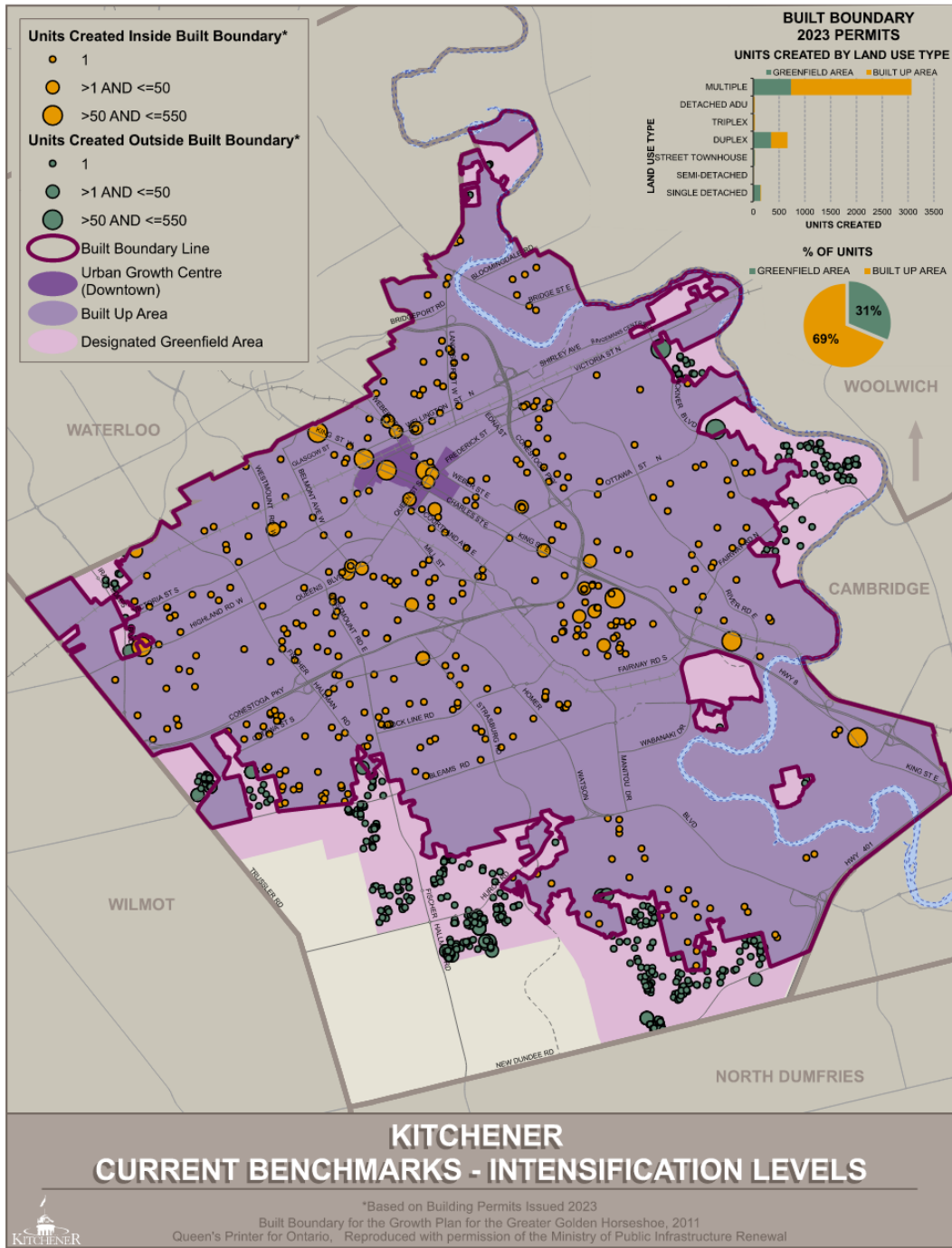


created in 2023 within Kitchener’s BUA, DGA and built boundary line (the limits of the City’s developed urban area as established by the Province in 2006). The figures show that location of new units created in 2022 were spread out across the BUA and the DGA in 2022, however, more medium and large sized developments were located within the protected major transit station areas in 2023.

**Figure 9. 2022 Intensification Levels**



**Figure 10. 2023 Intensification Levels**



### 3.2 DENSITY TARGETS

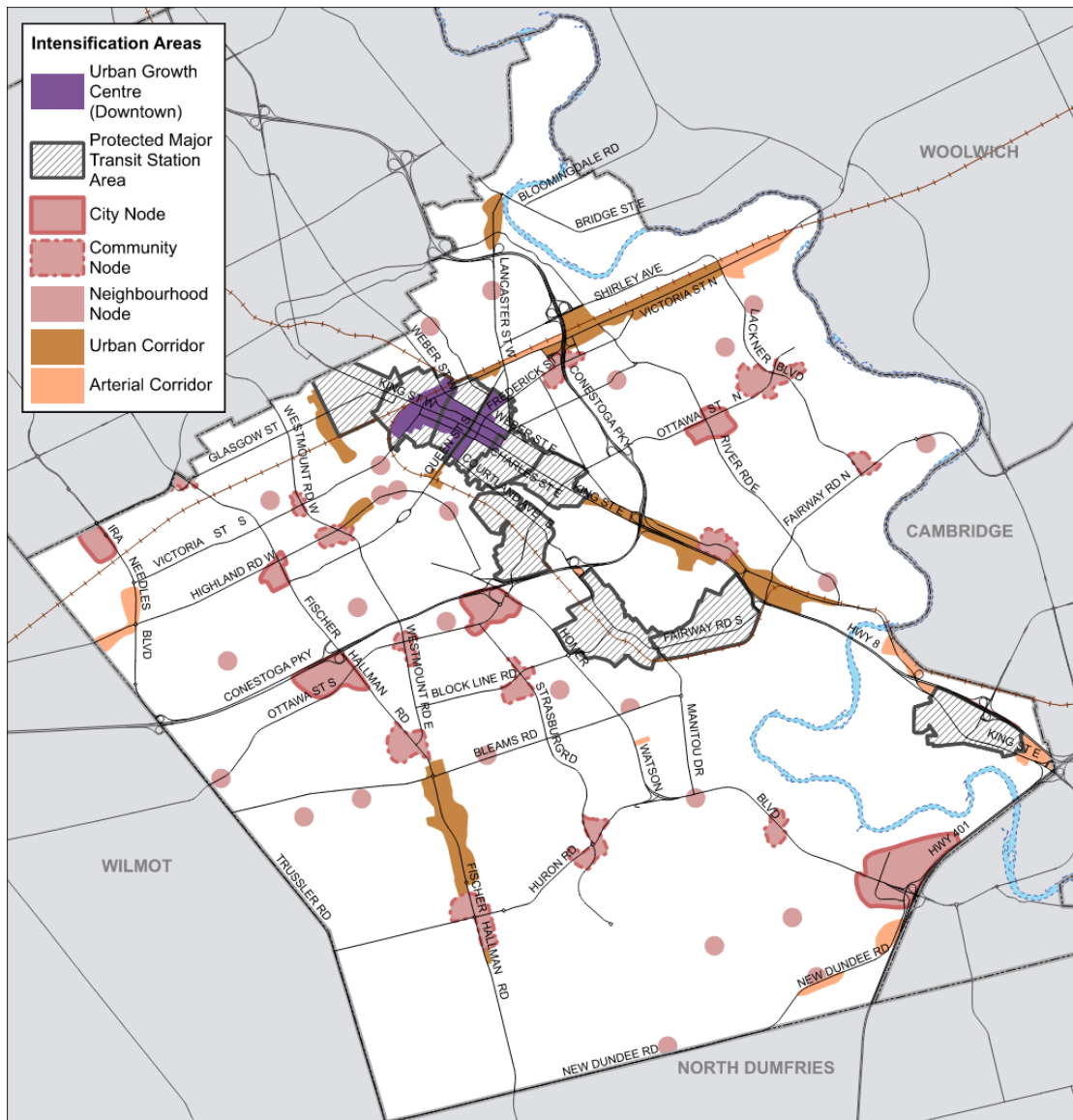
Kitchener’s Official Plan establishes a density target of 55 residents and jobs combined per gross hectare for areas serving primarily a residential function and 40 residents and jobs combined per gross hectare for areas serving primarily an employment function within the Designated Greenfield Area (DGA). Designated greenfield area (DGA) are lands within the urban area but outside of delineated built-up areas that are designated for development and are required to accommodate forecasted growth. Through ROPA 6, the minimum DGA density target for Kitchener and the Region have been revised to 65 and 59 residents and jobs combined per gross hectare by 2051, respectively (Table 6).

**Table 6. Minimum DGA Density Target, Kitchener and Region of Waterloo DGA**

	<b>Minimum Density Target (residents and jobs combined per gross hectare)</b>
<b>Kitchener DGA</b>	65
<b>Region of Waterloo</b>	<b>59</b>

Intensification areas are identified throughout the City in both the BUA and the DGA as key locations where growth is to be focused. Kitchener’s primary intensification areas include the Urban Growth Centre (UGC), Protected Major Transit Station Areas (PMTSA’s), City Nodes, Community Nodes, and Urban Corridors. The Secondary intensification areas include Neighbourhood Nodes, Arterial Corridors and other site-specific opportunities. Figure 11 shows the primary and secondary intensification areas.

**Figure 11. Intensification Areas in Kitchener, Kitchener Official Plan 2014**



The Growth Plan, 2020 provides a minimum density target of 200 residents and jobs combined per hectare to be achieved for Kitchener’s UGC (Downtown) by 2031. Although the Regional Official Plan notes the same density for Kitchener’s UGC (Downtown) as the Growth Plan, the Kitchener Official Plan sets a minimum density target of 225 residents and jobs combined per gross hectare.

The Growth Plan, 2020 has further established a minimum density of 160 residents and jobs combined per hectare for PMTSA’s that are served by light rail transit or bus rapid transit, as is the case in Kitchener. There is no timeline associated with density targets for PMTSA’s. ROPA 6 sets the same target for all of the PMTSA’s in Kitchener except for the Block Line PMTSA which is to achieve a minimum density target of 80

residents and jobs combined per hectare. Table 7 summarizes the minimum density targets established for the UGC and the PMTSA's in Kitchener.

**Table 7. Minimum Density Targets for Urban Growth Centre and Protected Major Transit Station Areas**

	<b>Minimum Density Target (residents and jobs combined per gross hectare)</b>
<b>UGC – Downtown Kitchener (by 2031)</b>	225
<b>PMTSAs (no timing noted)</b>	NA
Grand River Hospital	160
Central Station	160
Victoria Park and Kitchener City Hall	160
Queen plus Frederick	160
Kitchener Market	160
Borden	160
Mill	160
Block Line	80
Fairway	160
Sportsworld	160

### **3.2.1 TRACKING GROWTH IN INTENSIFICATION AREAS**

#### *3.2.1.1 Existing Measures*

Table 8 quantifies the existing number of dwelling units, residents, non-residential floor area, jobs and density measure (residents and jobs per hectare) for the primary intensification areas within Kitchener's BUA and DGA. The non-residential floor area and job estimates have not been adjusted to account for changes in office and work from home trends brought on by the COVID-19 pandemic. The Region is undertaking a workplace count survey in 2024 and it is expected that this survey will inform updates to the non-residential floor area and job estimates that reflect pandemic related changes to employment.

Interest in residential development has remained robust. The estimated density of the Urban Growth Centre (UGC), Queen and Frederick PMTSA, and Victoria Park and Kitchener City Hall PMTSA is 220 RJs/ha, 185 RJs/ha, and 136 RJs/ha respectively in 2023. The Queen and Frederick PMTSA has already met its density target of 160 RJs/ha.

**Table 8. Existing Measures for Primary Intensification Areas**

Type of Area	Land Area (ha)	Units	Residents	Non-residential Floor Area (m <sup>2</sup> )	Jobs	Residents and Jobs / ha
Urban Growth Centre <sup>1,2</sup>	107	4,872	8,335	841,264	15,233	220
PMTSAs	715	13,914	28,382	1,679,121	25,090	75
Grand River Hospital	84	1,345	2,973	203,964	3,964	82
Central Station <sup>2</sup>	68	1,238	2,663	277,060	3,420	89
Victoria Park and Kitchener City Hall <sup>2</sup>	59	2,023	3,769	496,245	4,243	136
Queen and Frederick <sup>2</sup>	45	1,918	3,696	164,460	4,586	185
Kitchener Market	49	1,392	3,010	58,385	838	78
Borden	51	534	1,231	106,400	1,187	48
Mill	89	1,129	2,733	161,202	1,000	42
Block Line	99	1,802	3,481	46,193	717	42
Fairway	92	2,342	4,286	101,782	2,913	78
Sportsworld	79	191	540	63,430	2,220	35
City Nodes	165	792	1,451	63,604	3,248	28
Community Nodes	234	3,528	6,321	87,530	3,810	43
Urban Corridors	280	2,067	3,892	249,366	6,642	38
<b>Total for Primary Intensification Areas<sup>2</sup></b>	<b>1,394</b>	<b>20,301</b>	<b>40,047</b>	<b>2,079,621</b>	<b>38,790</b>	<b>57</b>

**Notes:**

1. UGC Data is provided by the Region based on Census, building permit and workplace count statistics. Job estimate for the UGC has not been updated for this year. As such, job estimate for UGC is from 2021.
2. Boundary for the Urban Growth Centre overlaps with the boundary of the Central Station, Victoria Park and Kitchener City Hall, and the Queen plus Frederick PMTSA boundaries. Therefore, Urban Growth Centre data has not been included in the subtotal for primary intensification areas.

**3.2.1.2 Capacity for New Growth**

Table 9 explores the estimated potential for accommodating new development within the primary intensification areas based on existing zoning only.

The primary intensification areas are well positioned with the existing zoning in place to accommodate some of the projected growth in Kitchener. New development applications and land use/zoning reviews such as the Growing Together project and on-going secondary planning work will continue to refine the planning framework and add to the capacity to accommodate growth in these areas.

**Table 9. Additional Capacity Measures for Primary Intensification Areas**

50% Scenario

The maximum amount of development permitted in the as-of-right zoning represents the City’s total capacity to accommodate growth given current planning tools. It is anticipated that only some parcels within intensification areas will be redeveloped within the short or medium term for a variety of reasons. Some parcels will be developed at lower densities than the maximum permitted by zoning. Still others will receive zoning by-law amendments to exceed these maximums. In order to account for these factors, this report evaluates 50% of the maximum permitted by zoning as a reasonable estimate or proxy of opportunities for growth. As-of-right zoning permissions do not include any changes to zoning proposed through Growing Together project.

Type of Area	Land Area (ha)	Units	Residents	Non-residential Floor Area (m <sup>2</sup> )	Jobs	Residents and Jobs / ha
Urban Growth Centre <sup>1</sup>	107	1,850	3,264	242,567	9,349	118
Major Transit Station Areas	715	12,367	23,072	809,874	27,294	70
Grand River Hospital	84	1,509	2,757	81,169	3,035	69
Central Station <sup>1</sup>	68	1,576	2,988	140,156	4,778	113
Victoria Park and Kitchener City Hall <sup>1</sup>	59	1,162	2,084	57,175	3,341	92
Queen plus Frederick <sup>1</sup>	45	1,044	2,063	126,730	4,362	143
Kitchener Market	49	1,191	2,107	59,130	1,946	82
Borden	51	1,603	2,866	102,109	2,988	115
Mill	89	2,168	3,982	32,358	1,884	66
Block Line	99	1,332	2,511	143,278	2,958	55
Fairway	92	390	1,012	18,703	695	19
Sportsworld	79	393	703	74,465	1,308	26
City Nodes	165	2,322	4,154	515,054	9,559	83
Community Nodes	234	9,206	16,994	655,305	17,968	150
Urban Corridors	280	5,521	10,630	427,598	11,238	78
<b>Total for Primary Intensification Areas<sup>1</sup></b>	<b>1,394</b>	<b>29,416</b>	<b>54,849</b>	<b>2,433,232</b>	<b>66,059</b>	<b>87</b>

Notes:

1. Boundary for the Urban Growth Centre overlaps with the boundary of the Central Station, Victoria Park and Kitchener City Hall, and the Queen plus Frederick PMTSA boundaries. Therefore, Urban Growth Centre data has not been included in the subtotal for primary intensification areas.

Table 10 provides an account of the total number of dwelling units, residents, non-residential floor area, jobs and density measure (residents and jobs per hectare) for the primary intensification areas within Kitchener’s BUA and DGA.

Given the additional opportunities for redevelopment, based on existing zoning, there is capacity and potential to accommodate more people and jobs within Kitchener’s primary intensification areas.

The UGC is well positioned to achieve its density target of 225 residents and jobs per hectare. Further, six (6) PMTSAs (Central Station, Victoria Park and Kitchener City

Hall, Queen plus Frederick, Kitchener Market, Borden, and Block Line) are also well positioned to meet the prescribed minimum density targets based on the current zoning. However, four (4) PMTSAs (Grand River Hospital, Mill, Fairway, and Sportsworld) may not be able to achieve their prescribed density target of 160 residents and jobs per hectare. These estimates are based on current zoning and do not take into account the proposed zoning framework for the PMTSAs through the Growing Together project. If the proposed zoning regulations come into effect, the City will be well positioned to meet or exceed its minimum density targets for all of the PMTSAs.

Other primary intensification areas do not have assigned density targets but add considerable population and employment to contribute to Kitchener’s growth allocation.

**Table 10. Total Measures (Existing + Additional Capacity) for Primary Intensification Areas**

Type of Area	Land Area (ha)	Units	Residents	Non-residential Floor Area (m <sup>2</sup> )	Jobs	Residents and Jobs / ha
Urban Growth Centre <sup>1</sup>	107	6,722	11,599	1,083,831	24,582	338
Major Transit Station Areas	715	26,281	51,454	2,488,995	52,384	145
Grand River Hospital	84	2,854	5,730	285,133	6,999	151
Central Station <sup>1</sup>	68	2,814	5,650	417,216	8,199	202
Victoria Park and Kitchener City Hall <sup>1</sup>	59	3,185	5,853	553,420	7,583	228
Queen plus Frederick <sup>1</sup>	45	2,962	5,759	291,190	8,948	328
Kitchener Market	49	2,583	5,117	117,515	2,784	160
Borden	51	2,137	4,097	208,509	4,176	163
Mill	89	3,297	6,715	193,560	2,884	108
Block Line	99	3,134	5,991	189,471	3,675	97
Fairway	92	2,732	5,298	120,485	3,608	97
Sportsworld	79	584	1,243	137,895	3,528	61
City Nodes	165	3,114	5,605	578,658	12,807	112
Community Nodes	234	12,734	23,316	742,835	21,778	193
Urban Corridors	280	7,588	14,522	676,964	17,880	116
<b>Total for Primary Intensification Areas<sup>1</sup></b>	<b>1,394</b>	<b>49,717</b>	<b>94,896</b>	<b>4,512,853</b>	<b>104,849</b>	<b>143</b>

Notes:

1. Boundary for the Urban Growth Centre overlaps with the boundary of the Central Station, Victoria Park and Kitchener City Hall, and the Queen plus Frederick PMTSA boundaries. Therefore, Urban Growth Centre data has not been included in the subtotal for primary intensification areas.



### 3.3 ESTIMATED LAND SUPPLY

The estimated land supply for Kitchener is a total of the potential capacity within the primary or secondary intensification areas, and the potential supply from registered, draft approved and in-circulation subdivisions. As development moves from raw land through the development approvals stage and eventually to construction, the land supply estimates become more accurate.

Table 11 illustrates that the City’s land supply includes a potential capacity of approximately 84,826 dwelling units and 2.97 million square metres of non-residential floor space.

The estimated supply of dwelling units and non-residential floor space has increased compared to the previous report, reflecting changes in boundaries of the intensification areas based on the 2014 Official Plan. The estimated supply is further anticipated to increase once zoning is updated based on land use/zoning reviews such as the Growing Together project and on-going secondary planning work. Timing of development from the estimated supply of units, however, is influenced by many factors including infrastructure timing, landowner priorities and market forces.

**Table 11. Estimated Land Supply (capacity of lands within the urban area boundary)**

Type of Area	Units	Residents	Non-residential Floor Area (m <sup>2</sup> )	Jobs
<b>Primary Intensification Areas</b>	<b>29,416</b>	<b>54,849</b>	<b>2,407,832</b>	<b>66,059</b>
<b>Secondary Intensification Areas</b>	<b>6,496</b>	<b>11,642</b>	<b>355,926</b>	<b>5,832</b>
Plan of Subdivisions - Registered	3,597	8,544	184,324	2,282
Plan of Subdivisions - Draft Approved	3,390	7,269	168	168
Plan of Subdivisions - In Circulation	1,053	2,522	-	-
<b>Total</b>	<b>43,952</b>	<b>84,826</b>	<b>2,973,651</b>	<b>74,341</b>

### 3.4 POPULATION AND EMPLOYMENT ALLOCATION

A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020 (the Growth Plan, 2020) provides population and employment forecasts for all upper-tier and single-tier municipalities in the Greater Golden Horseshoe area (GGH). The growth forecasts are further allocated to area municipalities by the Region.

The Region’s and Kitchener’s population and employment allocation as per Regional Official Plan Amendment No. 6 (ROPA 6), is identified in Table 12. Kitchener is forecast to grow to 409,200 people and 170,500 jobs by 2051 representing an increase of about 52 percent and 54 percent respectively between 2021 and 2051. These forecasts are to be used as the basis for planning and managing growth to 2051.

**Table 12. Population and Employment Forecasts Allocation**

Notes:

	Population		Employment	
	2021	2051	2021	2051
<b>City of Kitchener</b>	269,100	409,200	111,000	170,500
<b>Other Area Municipalities</b>	347,900	513,800	191,000	299,500
<b>Region of Waterloo</b>	<b>617,000</b>	<b>923,000</b>	<b>302,000</b>	<b>470,000</b>

1. Population figures in this table show census-based population plus four percent under coverage. As such, it does not include university and college students who temporarily reside in the Region (either in student residences or other accommodation) to study at post-secondary institutions.
2. All population and employment in this table represent mid-year figures.

Table 13 compares the current population and employment capacity with the population and employment allocations provided by the Region of Waterloo. Kitchener’s 2023 mid-year population estimated by the Region is now 281,000 with approximately 7,000 more people than reported in mid-year 2022. Table 13 also estimates that the City has an existing supply/capacity of developable land to accommodate more jobs than the 2051 employment allocation by the Region. However, there is a gap with respect to 2051 population allocation by the Region.

As previously discussed in this report, the estimated capacity for Kitchener is based on existing zoning. It does not include zoning updates anticipated through land use / zoning reviews such as the Growing Together project and on-going secondary planning work. Further, this report is based on intensification areas established as per the 2014 Official Plan that uses a 2031 planning horizon. There is sufficient zoned capacity to meet the City’s 2031 population forecast of 319,500. Work is currently underway to update land uses and zoning within Kitchener’s protected major transit station areas. Additionally, updated planning permissions will occur as part of Kitchener’s Official Plan, and ongoing secondary planning work in the Dundee North area of southwest Kitchener and Hidden Valley. This ongoing work will ensure that there are sufficient opportunities to accommodate planned residential growth within the urban area boundary to 2051. Through the Region’s ROPA 6, it was confirmed that there is sufficient land designated and available to accommodate the 2051 population forecast for both the Built-up area and designated greenfield area that will become development ready in the short term.

**Table 13. Population Allocation vs. Estimated Capacity**

	Population	Employment
Existing <sup>1</sup>	280,894	111,000
Capacity	84,826	74,341
Total	365,720	185,341
2051 Allocation	409,200	170,500
<b>Difference (Gap)</b>	<b>(43,480)</b>	<b>14,841</b>

**Notes:**

1. Unofficial interim population as of mid-year 2023 and employment estimate as of mid-year 2021, Region of Waterloo

## 4 CONCLUSION

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Kitchener is on track to achieve and potentially exceed its 2031 housing target. The Province's current reporting on Kitchener's housing target shows that Kitchener not only achieved but exceeded its 2023 housing target by 39%.

Despite current market conditions, Kitchener saw record numbers of building permits issued. In 2023, building permits were issued for a total of 3,985 new residential units, highest figure on record. 77% of new residential units developed in 2023 were in the form of multiple dwellings - a substantial increase compared to that in 2022 (40%) and highest number on record. A broad range of housing types have been developed in the last two years (2022 and 2023) with 64% as multiple dwelling types (49% of multiple dwelling types were in the form of low to mid rise buildings), 6% as townhouses, and 30% in single-detached, semi-detached, duplex, triplex and detached additional dwelling types.

Kitchener exceeded its minimum annual intensification target with 69% of residential growth within the Built-up area in 2023. The 5-year average intensification level is 61% which also exceeds our minimum intensification target (60%).

The number of residents and jobs per hectare (RJs/ha) in the Urban Growth Centre (Downtown) is 220 RJs/ha, surpassing the provincially mandated minimum target of 200 RJs/ha by 2031, and approaching the City's higher Official Plan minimum target of 225 RJs/ha by 2031. Further, the estimated density of the Queen and Frederick Protected Major Transit Station Area is 185 RJs/ha, exceeding its minimum density target of 160 RJs/ha.

It is anticipated that the City's growth management program, including the strategy, framework and dynamic tracking and monitoring system, will be updated in future years to reflect: changes to provincial legislation; updates to the Region's Official Plan; and, subsequently the City's Official Plan review which will follow. With planned updates to land uses and zoning within Kitchener's protected major transit station areas, land use reviews that will occur as part of Kitchener's Official Plan review over the next two years, and ongoing secondary planning work in the Dundee North area of southwest Kitchener, there continues to be sufficient opportunities to accommodate planned residential and employment growth to 2051.