

Kitchener Growth Management Strategy

Annual Monitoring Report 2024

EXECUTIVE SUMMARY

In 2009, Kitchener approved its Growth Management Strategy (KGMS). 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 2024 growth management data continue to be encouraging.

Kitchener has set the stage to achieve and potentially exceed its 2031 housing target through its planning approvals, efficient processes, investments in supporting infrastructure and updating to our planning framework. Building these housing units falls primarily to the private sector. While the number of housing starts is yet to be confirmed by the Province, it appears that at least approximately 95% of the housing target was met in 2024. However, economic and market headwinds put the achievement of the City housing starts in the next couple of years in question.

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 194 RJs/ha, exceeding its density target of 160 RJs/ha.

The City’s 2024 intensification level and the 5-year average intensification level is 57% indicating that the City is on track to contribute towards, and in some years exceed, the minimum intensification target of 60%.

In 2024, building permits were issued for a total of 2,558 new residential units. 86% of new multiple dwelling units developed in 2024 were in the form of low to mid rise multiple dwellings - a substantial increase compared to that in 2023 (32%). Although the development of duplex dwelling units and detached ADUs has declined in 2024 compared to 2023, the development of triplexes has seen an increase.

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 and the City’s new Official Plan.

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1 EVOLUTION OF GROWTH MANAGEMENT

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 Regional Municipality 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 KGMS worked alongside the Growth Plan for the Greater Golden Horseshoe, 2006 (the Growth Plan, 2006) which was in effect at that time 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 and further amended it in January of 2025. 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 2024.

The provincial legislation and the regional planning landscape have significantly changed in the last year. In May 2024, Bill 162, Get it Done Act reinstated modifications to Regional Official Plan Amendment 6 which included additional lands in southwest Kitchener to the urban area. A new Provincial Planning Statement (PPS), 2024 came into effect on October 20, 2024, integrating both the Provincial Policy Statement, 2020 and A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020 (the Growth Plan, 2020). Further, the Region became an upper-tier municipality without planning responsibilities as of January 1, 2025. The Regional Municipality of Waterloo Official Plan (the Regional Official Plan) in effect is now deemed to be part of Kitchener's Official Plan as per Section 70.13 (2) of the Act, until the time City revokes or amends it to provide otherwise. These changes have and will continue to influence how the City plans, manages, and monitors growth.

This is the 15th edition of the Monitoring Report and reflects 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 intensification and density targets in the former Growth Plan and the new PPS.

Table 1. Annual Housing Target for the City of Kitchener

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

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

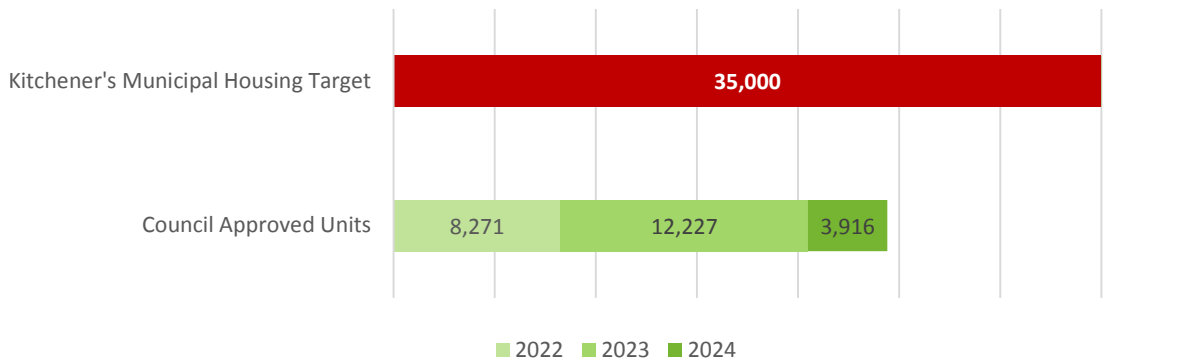
2.1 TRACKING PROGRESS ON KITCHENER’S MUNICIPAL HOUSING TARGET

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 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 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. In 2024, Council approved 55 applications with a total of 3,916 units. A cumulative 24,414 units have been approved since 2022. This accounts for approximately 70% of Kitchener’s municipal housing target.

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



2.1.2 RESIDENTIAL DEVELOPMENT RATES

Figure 2 illustrates the total number of new units for which building permits were issued annually from 2010 to 2024 and a 5-year moving average. In 2024, building permits were issued for a total of 2,558 new residential units. This was a decrease compared to 2023. The 5-year moving average, although steadily grown over the years, has also declined last year.

Figure 2. Annual Residential Development Rates in Kitchener, 2010-2024

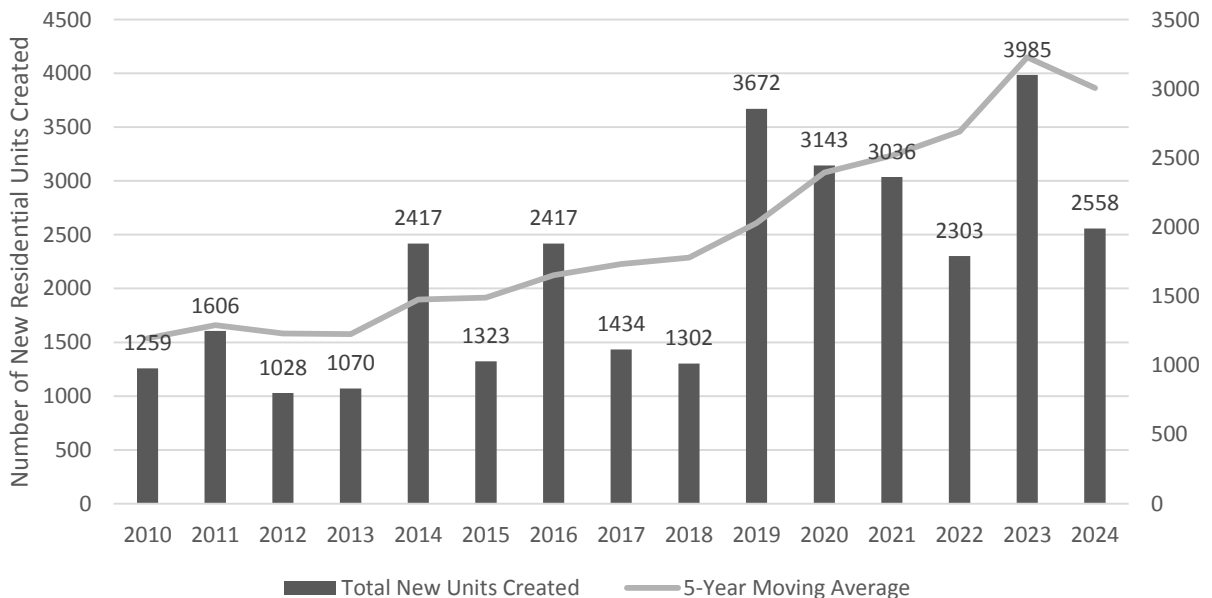


Table 2 provides the number of new units for which building permits were issued by the type of dwelling in 2023 and 2024 and the average of the last 5-years (2020-2024). The development of single detached, semi-detached street townhouse and cluster townhouse dwellings has been steady since since 2023. The development of

townhouses (both street townhouse and cluster townhouse) has been low in the last two years. Although the development of duplex dwelling units and detached ADUs has declined in 2024 compared to 2023, it is still higher than the 5-year average. The development of triplexes has seen an increase. 2024 has been slow for development of multiple dwellings compared to 2023 which a record year for the number of multiple dwelling units for which building permits were issued.

Table 2. Annual Residential Development Rates by Dwelling Type, 2023-2024

Dwelling Type	Number of New Residential Units Created		
	2023	2024	5-year average
Single Detached	148	131	365
Semi-Detached	7	8	22
Street Townhouse	18	15	141
Duplex ¹	688	594	500
Triplex ¹	29	40	20
Fourplex ^{1,2}	-	33	-
Detached ADU ¹	27	22	17
Cluster Townhouse	0	0	27
Multiple Dwellings ^{2,3}	3,068	1,715	1,910
Total New Units	3,985	2,558	3,005

Notes:

1. In association with single detached, semi-detached and street townhouse dwelling types
2. Fourplexes have been reported as multiple dwellings in the previous years
3. Includes stacked townhouse dwellings

A further breakdown of multiple dwellings is illustrated in Table 3. In 2024, building permits for nine (9) mid rise multiple dwellings were issued with a total of 1,002 units. This was up from four (4) mid rise multiple dwellings with a total of 420 units issued in 2023. The predominant form of housing created in 2024 was low to mid rise multiple dwellings representing approximately 86% of the total multiple dwelling units for which building permits were issued for. There was only one (1) high rise multiple dwellings for which building permit was issued with a total of 202 units in 2024.

Table 3. Annual Residential Development Rates for Multiple Dwellings, 2023-2024

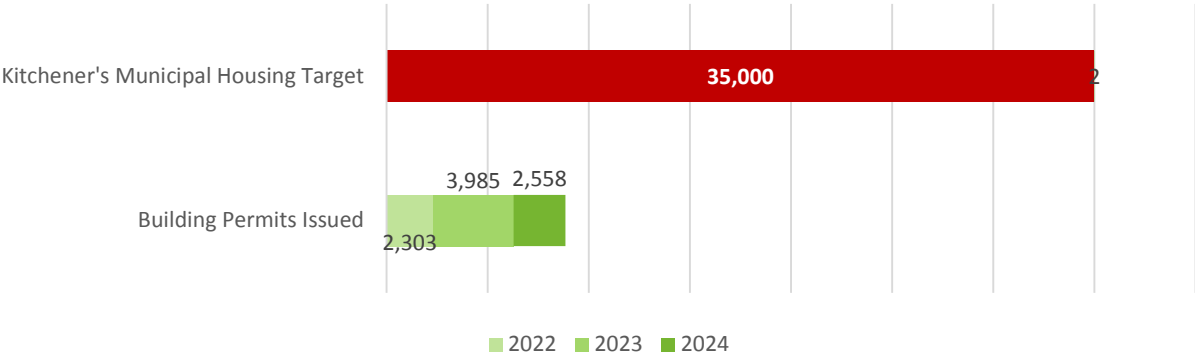
Dwelling Type	Number of New Residential Units Created	
	2023	2024
Stacked Townhouse	423 (14%)	434 (25%)
Low Rise Multiple (3 storeys or fewer)	121 (4%)	41 (2%)
Mid Rise Multiple (4 to 8 storeys)	420 (14%)	1,002 (59%)
High Rise Multiple (9 storeys or higher)	1,906 (62%)	202 (12%)
Additions/Conversions	198 (6%)	36 (2%)
Total Multiple Dwellings	3,068	1,715

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. In 2024, building permits were issued for 2,558 units. Building permits have been issued for a total of 8,846 units since 2022. This accounts for 25% of Kitchener’s municipal housing target.

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

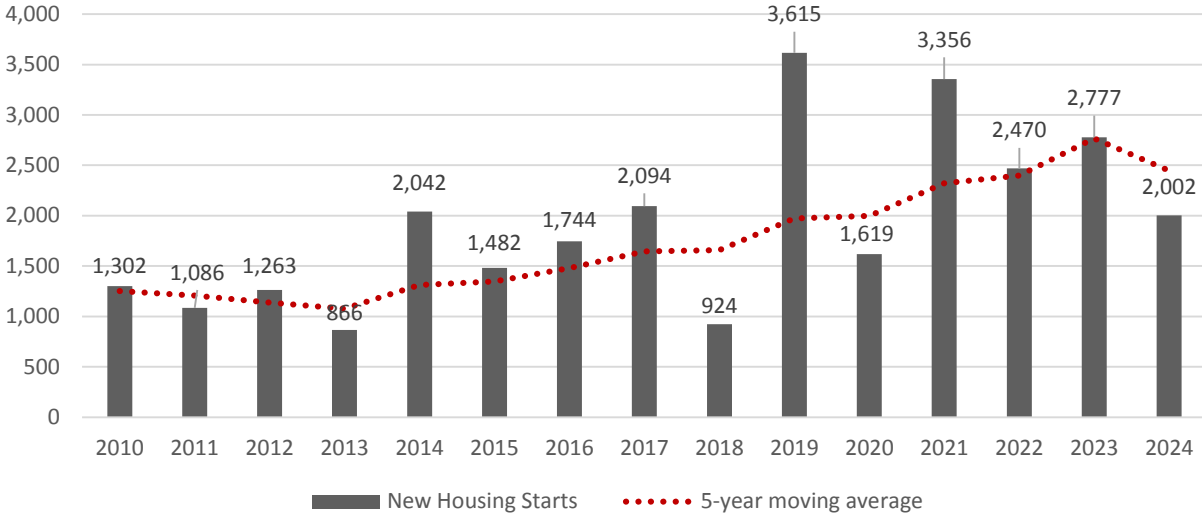


2.1.3 PROVINCIAL EVALUATION OF THE HOUSING TARGET

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 2010 and 5 year moving average. The trend generally follows the number of building permits that are issued in Kitchener.

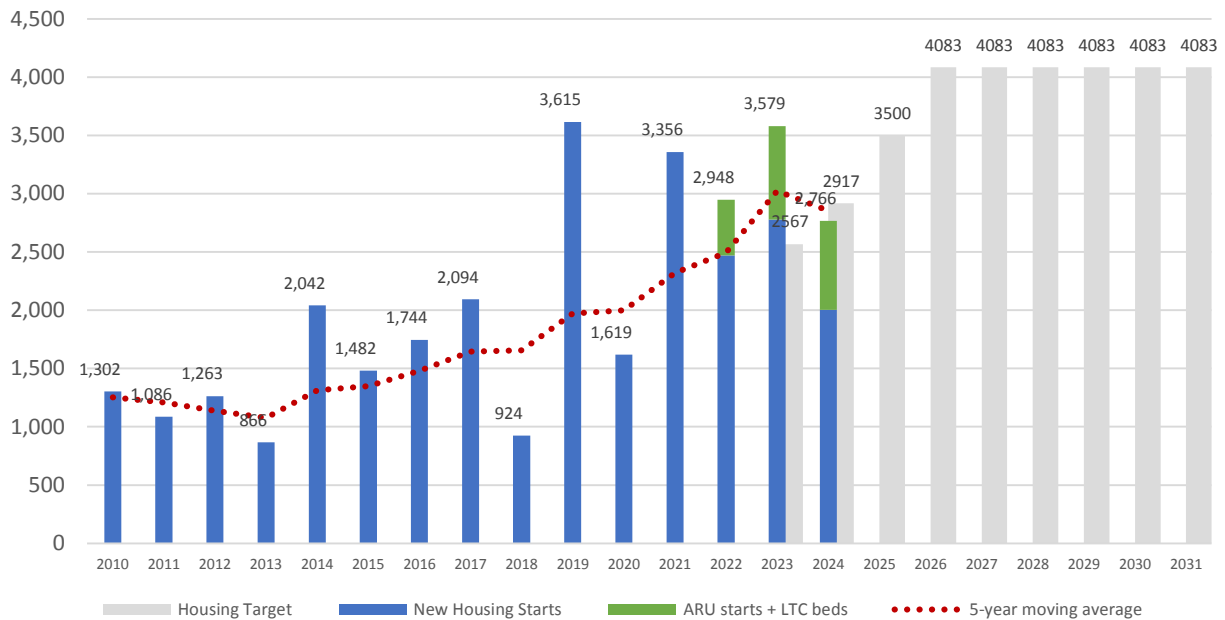
Figure 4. New Housing Starts as per CMHC, 2010-2024



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 and are not available for the years prior to 2022.

Figure 5 illustrates new housing starts from 2010 to 2024, ARU starts and long-term care beds in 2022 to 2024, 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 (2010 to 2024) is 7%. Kitchener exceeded its 2023 assigned housing target by 39%. While the number of housing starts in 2024 is yet to be confirmed by the Province, it appears that at least approximately 95% of the assigned housing target was met in 2024. 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, 2010-2031

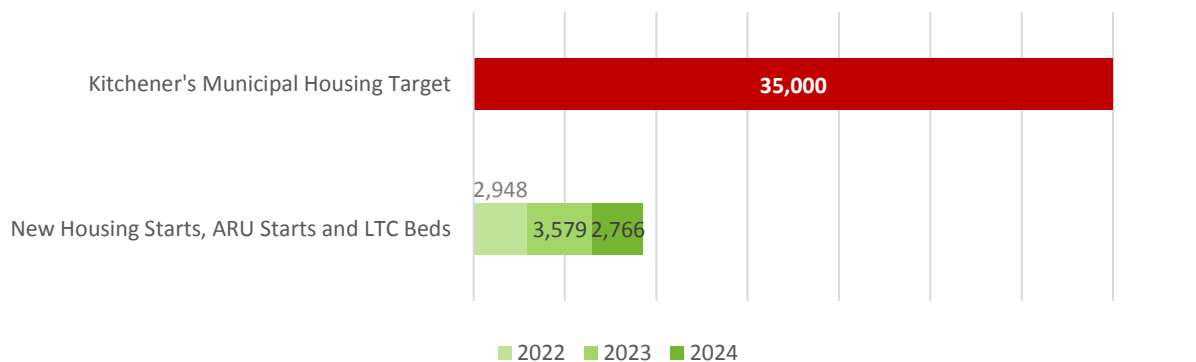


Notes:

- 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 illustrates Kitchener’s progress towards its provincially assigned housing target of 35,000 by 2031. Since 2022, Kitchener has seen a total of 9,293 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 26.5% of the housing target. 25,707 units are needed to meet the housing target by 2031, an average of approximately 3,672 units every year.

Figure 6. Kitchener’s progress towards the Municipal Housing Target, 2024

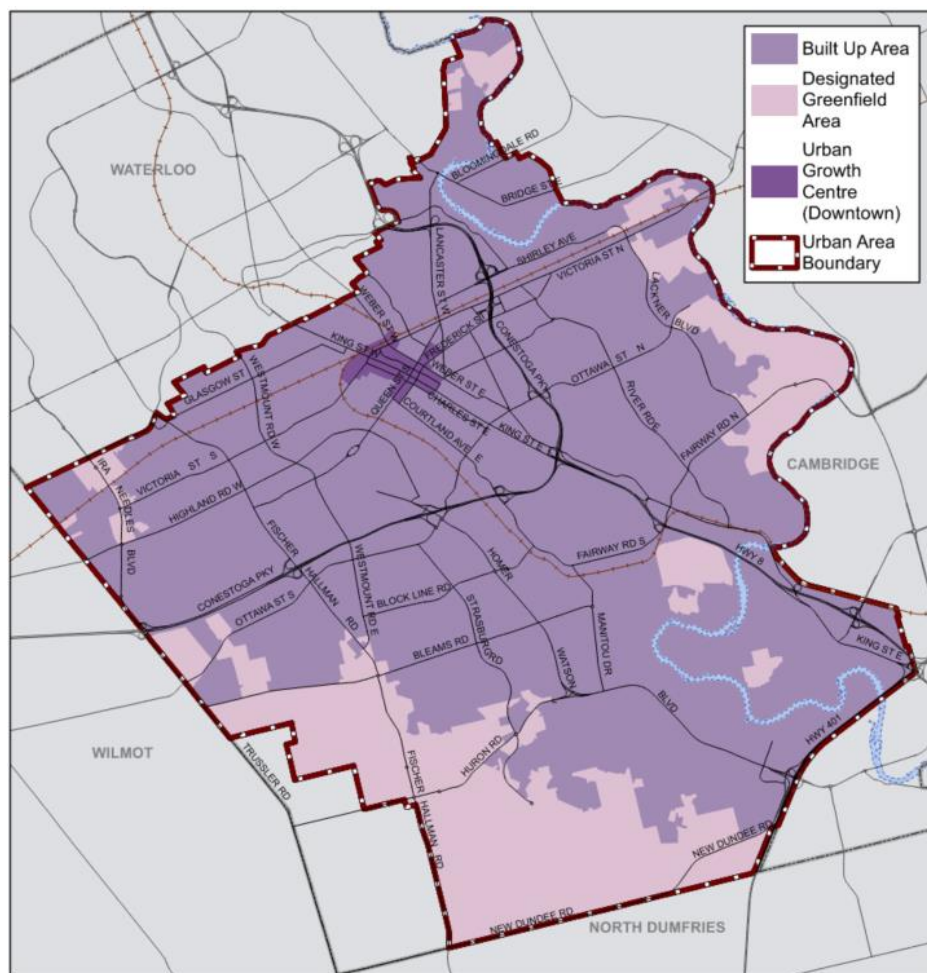


3 GROWTH FORECASTS & TARGETS

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 in May 2024, Bill 162, Get it Done Act reinstated modifications to the Regional Official Plan Amendment 6. This included an expansion of Kitchener’s Urban Area Boundary and DGA. Figure 7 reflects these modifications.

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 residential intensification targets have changed overtime since they were first introduced through the 2006 Growth Plan as a Region of Waterloo intensification target. Kitchener’s current minimum residential intensification target, established through the Region’s Official Plan amendment number 6 (ROPA 6), is 60%.

It should be noted that the PPS 2024 does not carry forward the concepts of BUA, the DGA, and the Urban Growth Centre. Further, there are no minimum residential intensification targets established in the PPS 2024. Kitchener’s current Official Plan includes these concepts. The PPS 2024 does not preclude planning authorities from establishing intensification targets. The intensification target as established through ROPA 6 is in effect.

3.1.1 INTENSIFICATION LEVEL PROGRESS

Annual residential development rates by dwelling type in the BUA and DGA are indicated for 2023 and 2024 in Table 4. The intensification level in 2023 was 69% and in 2024 was 57%. The City expects to see “spike” (such as in 2023) and “dip” (such as in 2024) 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 4. Annual Residential Development Rates in the BUA and DGA by Dwelling Type, 2023 and 2024

Dwelling Type	2023			2024		
	DGA	BUA	Total	DGA	BUA	Total
Single Detached	137	11	148	125	6	131
Semi-Detached	4	3	7	0	8	8
Street Townhouse	18	0	18	15	0	15
Duplex ¹	356	332	688	264	330	594
Triplex ¹	0	29	29	0	40	40
Fourplex ^{1,2}	-	-	-	0	33	33
Detached ADU ¹	1	26	27	0	22	22
Cluster Townhouse	0	0	0	0	0	0
Multiple Dwellings ^{2,3}	732	2,336	3,068	708	1,007	1,715
Total New Units (3)	1,248 (31%)	2,737 (69%)	3,985 (100%)	1,112 (43%)	1,446 (57%)	2,558 (100%)

Notes:

- 1. In association with single detached, semi-detached and street townhouse dwelling types
- 2. Fourplexes have been reported as multiple dwellings in the previous years
- 3. 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, 2010-2024

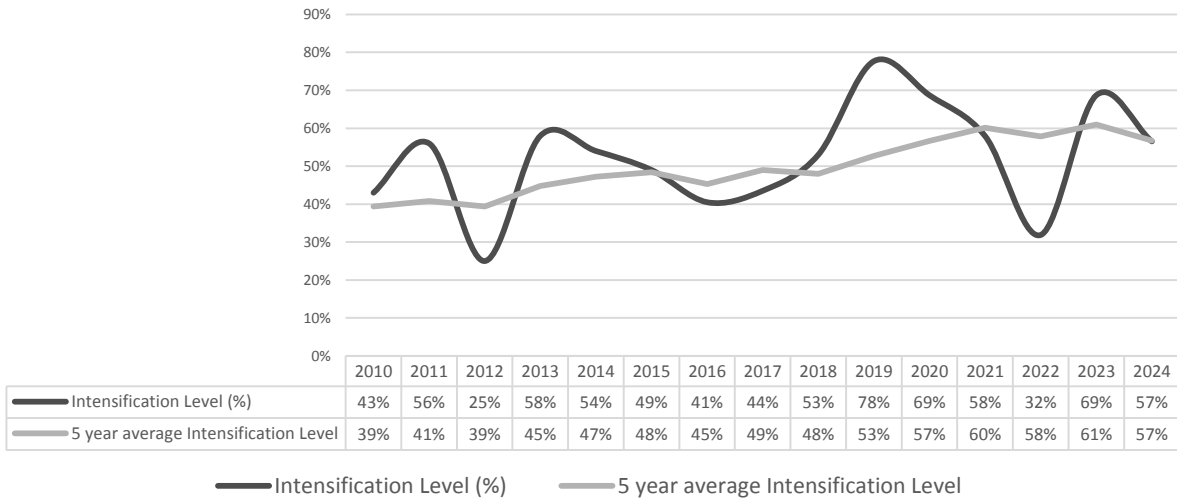
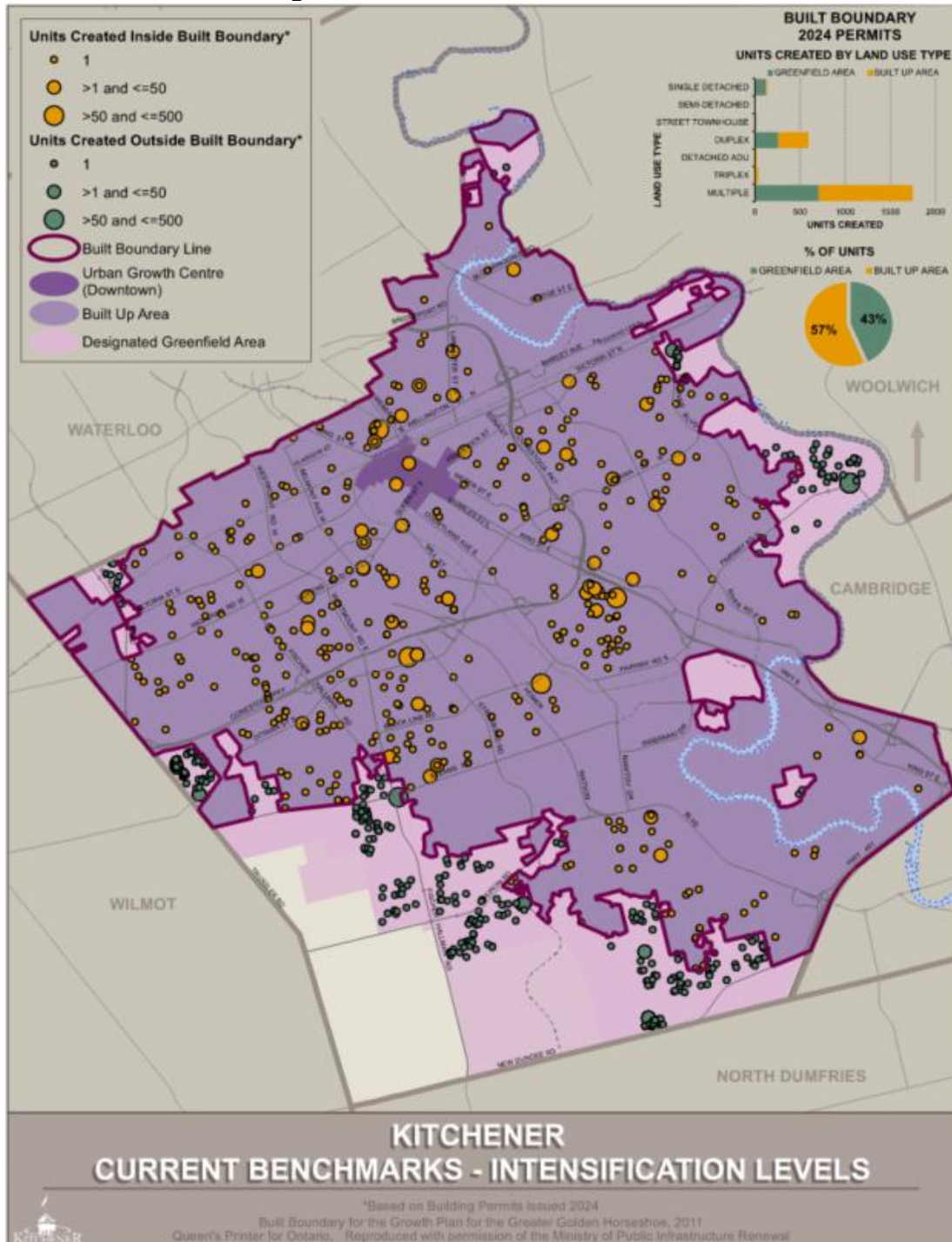


Figure 9 illustrates the location of new units created in 2024 within Kitchener’s BUA, DGA and built boundary line. The figure shows that location of new units created in 2024 were spread out across the BUA and the DGA.

Figure 9. 2024 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 5).

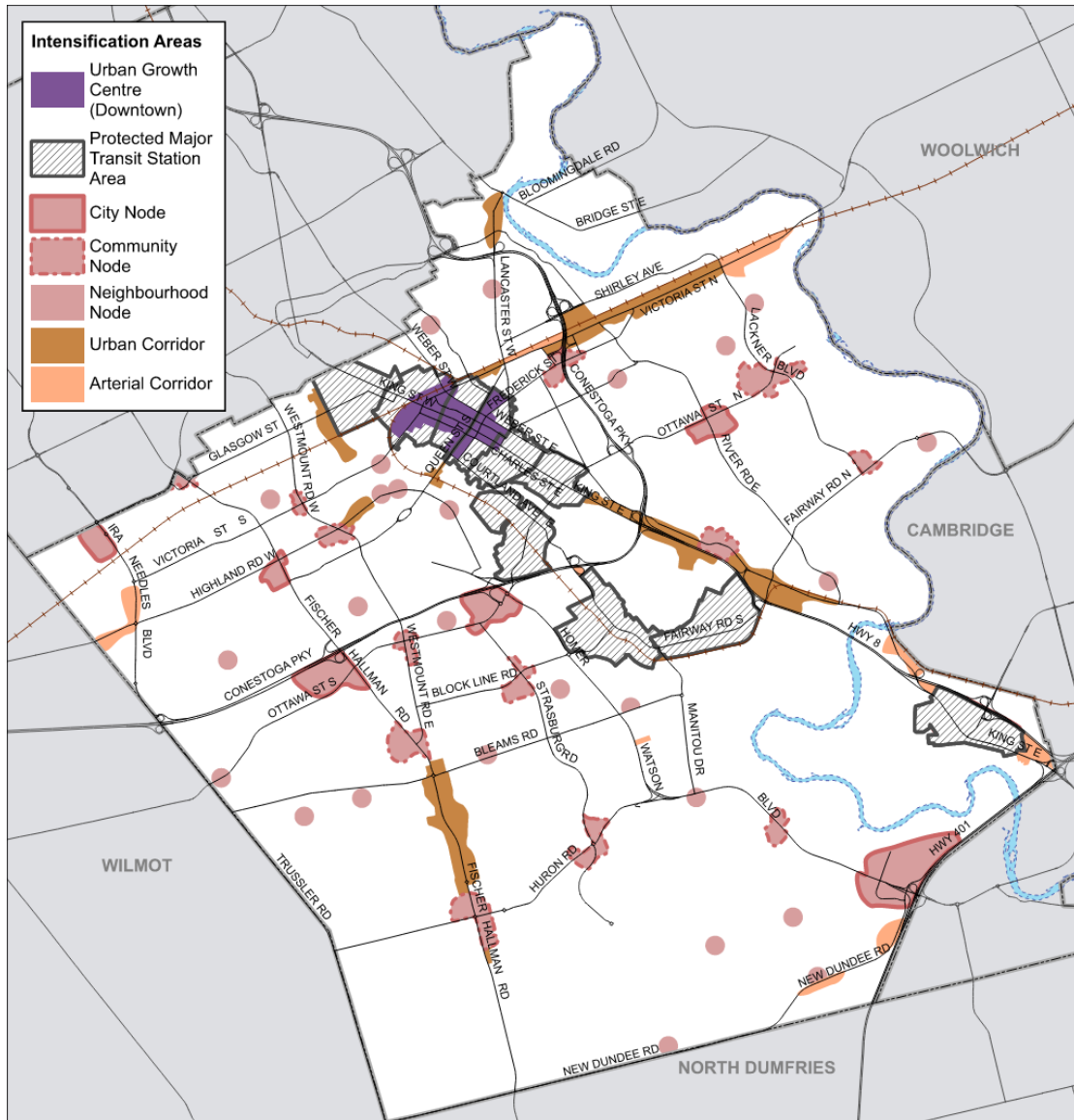
Table 5. Minimum DGA Density Target, Kitchener and Region of Waterloo DGA

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

It is to be noted the PPS 2024 does not establish minimum density targets for DGA but rather encourages large and fast-growing municipalities, including Kitchener, to plan for a target of 50 residents and jobs combined per gross hectare in designated growth areas.

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 10 shows the primary and secondary intensification areas.

Figure 10. Intensification Areas in Kitchener, Kitchener Official Plan 2014



The Growth Plan, 2020 provided 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 PPS 2024 did not maintain the concept of an UGC and therefore does not establish a minimum density target for Kitchener’s UGC.

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. The density targets established for PMTSA's are carried forward in the PPS 2024. ROPA 6 sets the same minimum 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 6 summarizes the minimum density targets established for the UGC and the PMTSA's in Kitchener.

Table 6. Minimum Density Targets for Urban Growth Centre and Protected Major Transit Station Areas

	Minimum Density Target (residents and jobs combined per gross hectare)
UGC – Downtown Kitchener (by 2031)	225
PMTSAs (no timing noted)	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 7 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 has undertaken a workplace count survey in 2024 and it is expected that the results from this survey (unavailable at the time of writing this report) 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, 194 RJs/ha, and 137 RJs/ha respectively in 2024. The Queen and Frederick PMTSA has already met its density target of 160 RJs/ha.

Table 7. Existing Measures for Primary Intensification Areas

Type of Area	Land Area (ha)	Units	Residents	Non-residential Floor Area (m ²)	Jobs	Residents and Jobs / ha
Urban Growth Centre ^{1,2}	107	5,169	8,349	841,264	15,233	220
PMTSAs	715	14,523	29,460	1,685,926	25,189	76
Grand River Hospital	84	1,621	3,474	203,964	3,964	88
Central Station ²	68	1,235	2,646	278,132	3,456	89
Victoria Park and Kitchener City Hall ²	59	2,040	3,791	502,413	4,311	137
Queen and Frederick ²	45	2,160	4,29	164,523	4,588	194
Kitchener Market	49	1,463	3,138	58,385	838	81
Borden	51	537	1,236	105,864	1,181	48
Mill	89	1,131	2,736	161,240	1,000	42
Block Line	99	1,803	3,484	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	3,868	6,933	87,665	3,813	46
Urban Corridors	280	2,143	4,026	248,338	6,636	38
Total for Primary Intensification Areas²	1,394	21,326	41,869	2,085,533	38,886	58

Notes:

1. UGC Data is provided by the Region based on Census, building permit and workplace count statistics. Job estimate for the UGC is for 2021 and is based on Census 2016. The estimate has not been adjusted because of accuracy concerns for employment data with Census 2021 undertaken during Provincial lockdown.
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 8 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 8. 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 as it is under appeal.

Type of Area	Land Area (ha)	Units	Residents	Non-residential Floor Area (m ²)	Jobs	Residents and Jobs / ha
Urban Growth Centre ¹	107	1,811	3,200	233,936	9,216	116
Major Transit Station Areas ²	715	12,065	22,614	824,915	27,128	70
Grand River Hospital	84	1,394	2,554	76,317	2,893	65
Central Station ¹	68	1,608	3,069	142,058	4,867	116
Victoria Park and Kitchener City Hall ¹	59	1,148	2,073	52,229	3,306	91
Queen plus Frederick ¹	45	945	1,894	124,370	4,295	138
Kitchener Market	49	1,104	1,970	59,130	1,946	80
Borden	51	1,593	2,848	102,123	2,980	115
Mill	89	2,158	3,981	32,122	1,879	66
Block Line	99	1,332	2,511	143,397	2,959	55
Fairway	92	390	1,012	18,703	695	19
Sportsworld	79	393	703	74,465	1,308	26
City Nodes	165	4,011	7,193	603,950	12,874	122
Community Nodes	234	9,026	16,686	655,141	17,937	148
Urban Corridors	280	5,150	9,526	395,065	10,097	70
Total for Primary Intensification Areas¹	1,394	30,251	56,019	2,479,071	68,036	89

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.
2. Additional capacity measures for MTSA's do not account as-of-right zoning permissions through the Growing Together project as it is under appeal.

Table 9 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 zoning framework for the PMTSAs through the Growing Together project. Growing Together West has been approved but is not yet in effect and at this time Council’s consideration of updated land use and zoning for Growing Together East is expected in early Q2 2025. When new 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 9. Total Measures (Existing + Additional Capacity) for Primary Intensification Areas

Type of Area	Land Area (ha)	Units	Residents	Non-residential Floor Area (m ²)	Jobs	Residents and Jobs / ha
Urban Growth Centre ¹	107	6,980	11,549	1,075,200	24,449	336
Major Transit Station Areas ²	715	26,588	52,074	2,510,841	52,317	146
Grand River Hospital	84	3,015	6,028	280,281	6,858	153
Central Station ¹	68	2,843	5,715	420,190	8,323	205
Victoria Park and Kitchener City Hall ¹	59	3,188	5,864	554,642	7,616	228
Queen plus Frederick ¹	45	3,105	6,023	288,893	8,883	332
Kitchener Market	49	2,567	5,108	117,515	2,784	160
Borden	51	2,130	4,085	207,987	4,161	162
Mill	89	3,289	6,717	193,362	2,880	108
Block Line	99	3,135	5,994	189,590	3,676	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	4,803	8,645	667,554	16,122	150
Community Nodes	234	12,894	23,618	742,806	21,750	194
Urban Corridors	280	7,293	13,552	643,403	16,733	108
Total for Primary Intensification Areas¹	1,394	51,577	97,888	4,564,604	106,922	147

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.
2. Additional capacity measures for MTSA's do not account as-of-right zoning permissions through the Growing Together project as it is under appeal.

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 10 illustrates that the City’s land supply includes a potential capacity of approximately 45,810 dwelling units and 2.97 million square metres of non-residential floor space.

The estimated supply of dwelling units and non-residential floor space is further anticipated to increase once zoning is updated based on land use/zoning reviews such as the Growing Together project comes into effect 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 10. Estimated Land Supply (capacity of lands within the urban area boundary)

Type of Area	Units	Residents	Non-residential Floor Area (m ²)	Jobs
Primary Intensification Areas	30,251	56,019	2,479,071	68,036
Secondary Intensification Areas	5,768	10,318	416,017	7,152
Plan of Subdivisions - Registered	5,502	14,250	158,479	2,016
Plan of Subdivisions - Draft Approved	3,236	7,009	168	168
Plan of Subdivisions - In Circulation	1,053	2,522	-	-
Total	45,810	90,118	3,053,735	77,372

3.4 POPULATION AND EMPLOYMENT ALLOCATION

A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020 (the Growth Plan, 2020) provided 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 11. 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. Population and employment forecasts are being updated as part of City of Kitchener’s new Official Plan. These forecasts will be used as the basis for planning and managing growth to 2051.

Table 11. Population and Employment Forecasts Allocation

Notes:

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

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 12 compares the current population and employment capacity with the population and employment allocations provided by the Region of Waterloo. Kitchener’s 2024 mid-year population estimated by the Region is now 283,606 with approximately 2,700 more people than reported in mid-year 2023. Table 12 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, it shows that there is a shortfall 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 West project (under appeal), Growth Together East (Council consideration expected early Q2 2025) 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. Additionally, updated planning permissions will occur as part of Kitchener’s new Official Plan project: Kitchener 2051, and ongoing secondary planning work in the Dundee 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.

Table 12. Population Allocation vs. Estimated Capacity

	Population	Employment
Existing ¹	283,606	108,234
Capacity	90,118	77,372
Total	373,724	185,606
2051 Allocation	409,200	170,500
Difference (shortfall)	(35,476)	15,106

Notes:

1. Unofficial interim population and employment estimate as of mid-year 2024, Region of Waterloo

4 CONCLUSION

Kitchener has set the stage to achieve and potentially exceed its 2031 housing target through its planning approvals, efficient processes, investments in supporting infrastructure and updating to our planning framework. Building these housing units falls primarily to the private sector. While the number of housing starts is yet to be confirmed by the Province, it appears that at least approximately 95% of the housing target was met in 2024. However, economic and market headwinds put the achievement of the City housing starts in the next couple of years in question.

In 2024, building permits were issued for a total of 2,558 new residential units. A broad range of housing types have been developed in 2024 with 67% as multiple dwelling types (86% of multiple dwelling units were in the form of low to mid rise buildings – representing 58% of the total new units), and 33% in single-detached, semi-detached, townhouses, duplex, triplex and detached additional dwelling types. Although the development of duplex dwelling units and detached ADUs has declined in 2024 compared to 2023, the development of triplexes has seen an increase.

The City's 2024 intensification level and the 5-year average intensification level is 57% indicating that the City is on track to contribute towards, and in some years exceed, the minimum intensification target of 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 194 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; and, the City's new Official Plan. With 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 new Official Plan, and ongoing secondary planning work in the Dundee area of southwest Kitchener and Hidden Valley, there continues to be sufficient opportunities to accommodate planned residential and employment growth to 2051.