



Managing Momentum: Winnipeg's Policy Responses to Recent Population Growth, Urban Expansion, and Fiscal Pressure

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2026 Manitoba Professional Planners Institute Conference

Photo Credit: Tyler Walsh / Tourism Winnipeg

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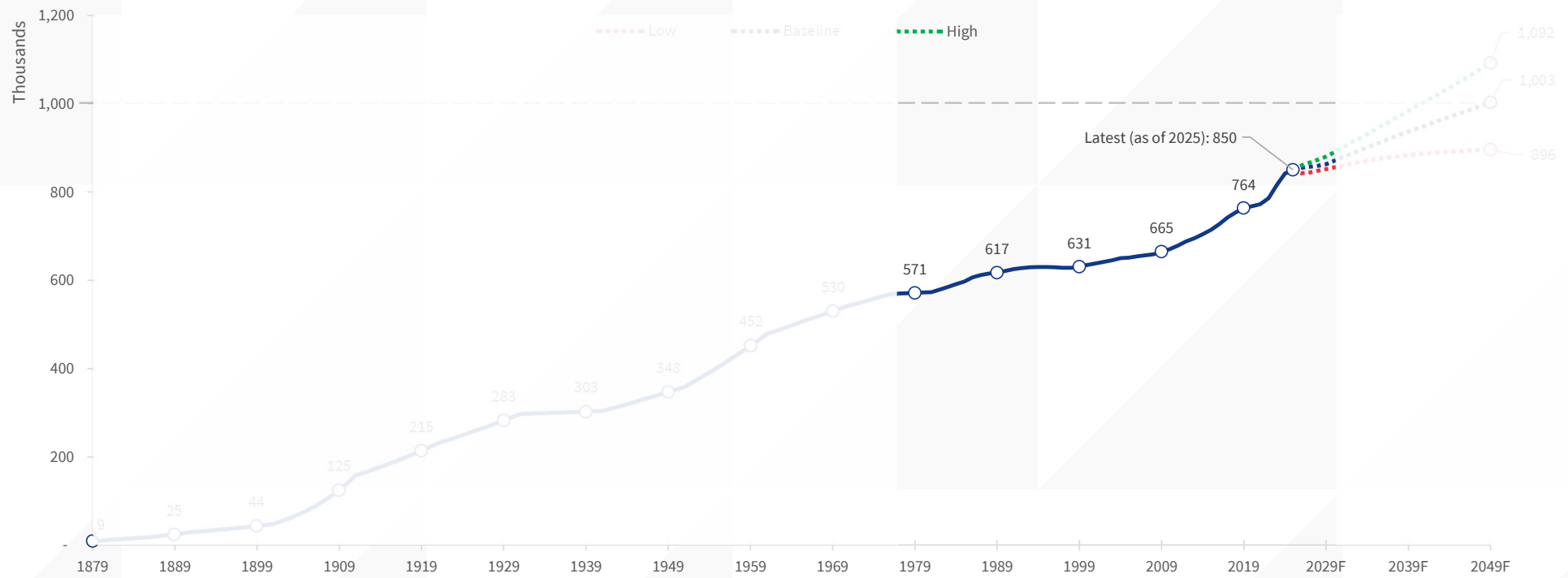
Section 1

A Brief History of Growth in Winnipeg

Population: Winnipeg's History

City of Winnipeg Population

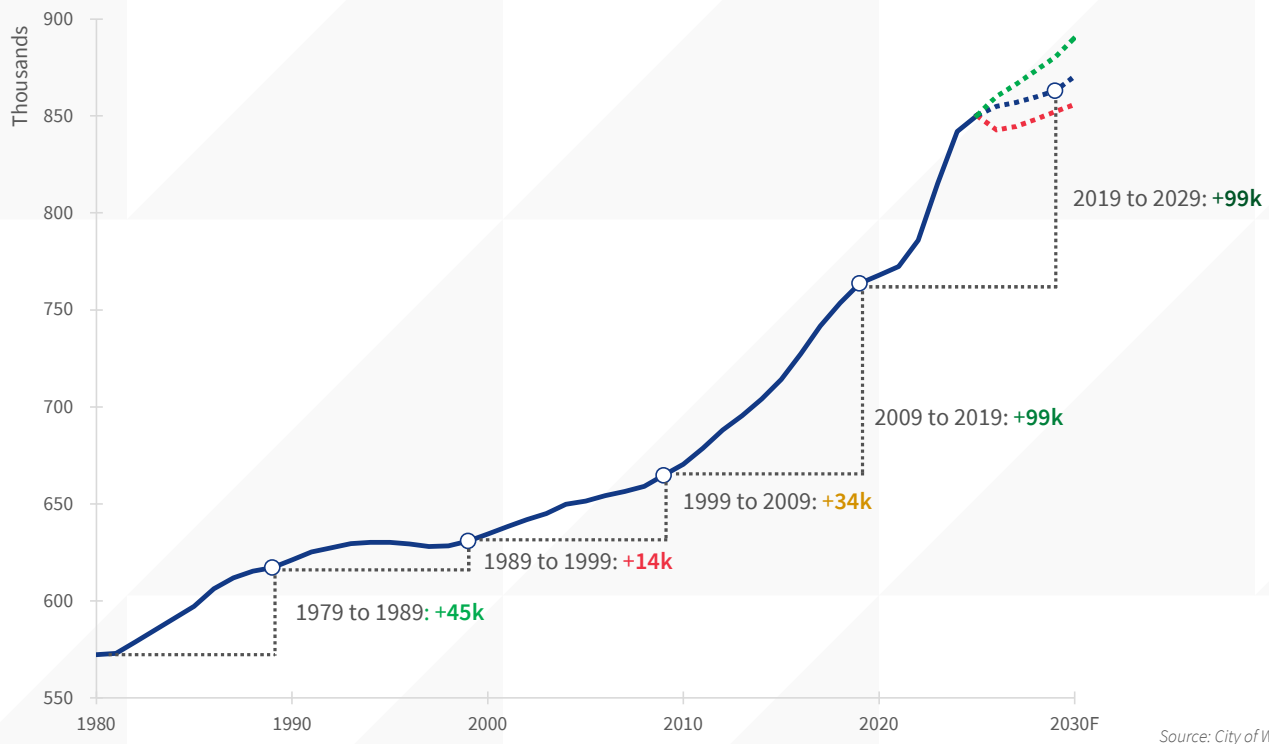
Estimates from 1879 to 2025, projections from 2026 to 2049 (as of June 2025)



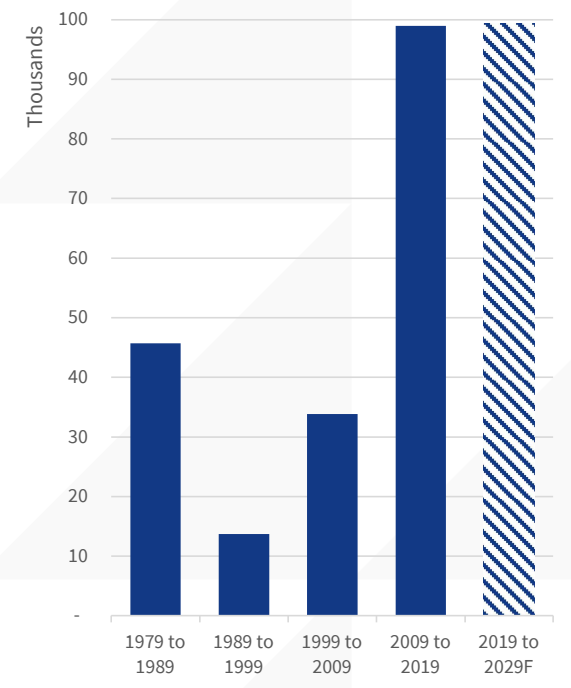
Source: City of Winnipeg Economic Development & Policy 25-Year Population Projections for 2025

Population: Recent Trends

City of Winnipeg Population by Decade



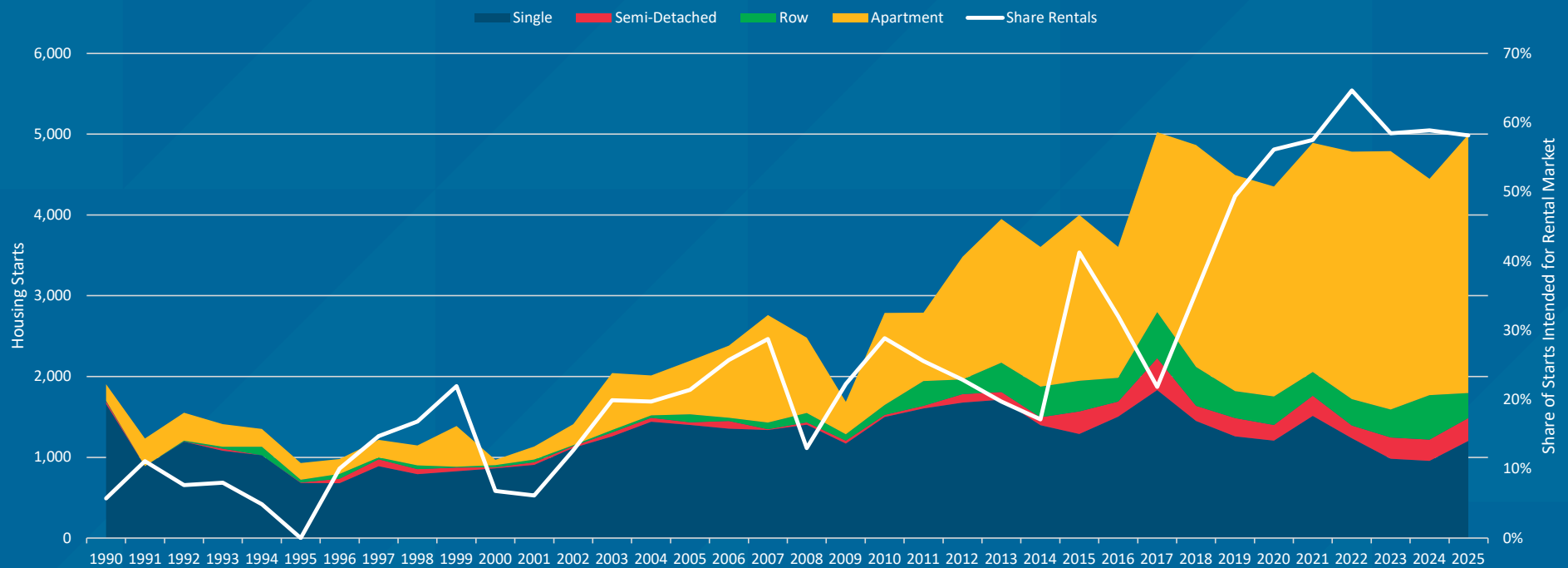
Growth by Decade Summary



Source: City of Winnipeg Economic Development & Policy 25-Year Population Projections for 2025

Housing Starts

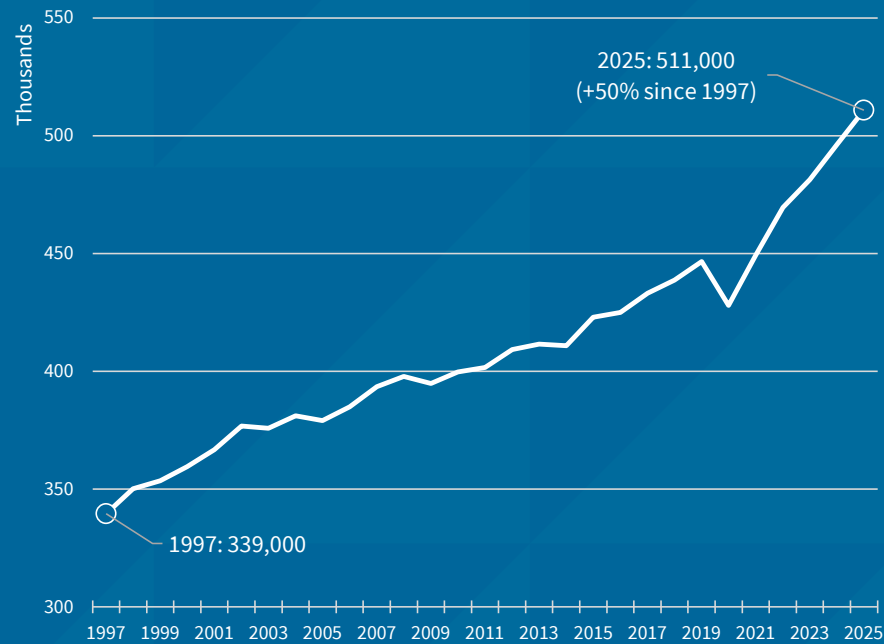
By Type and Intended Market



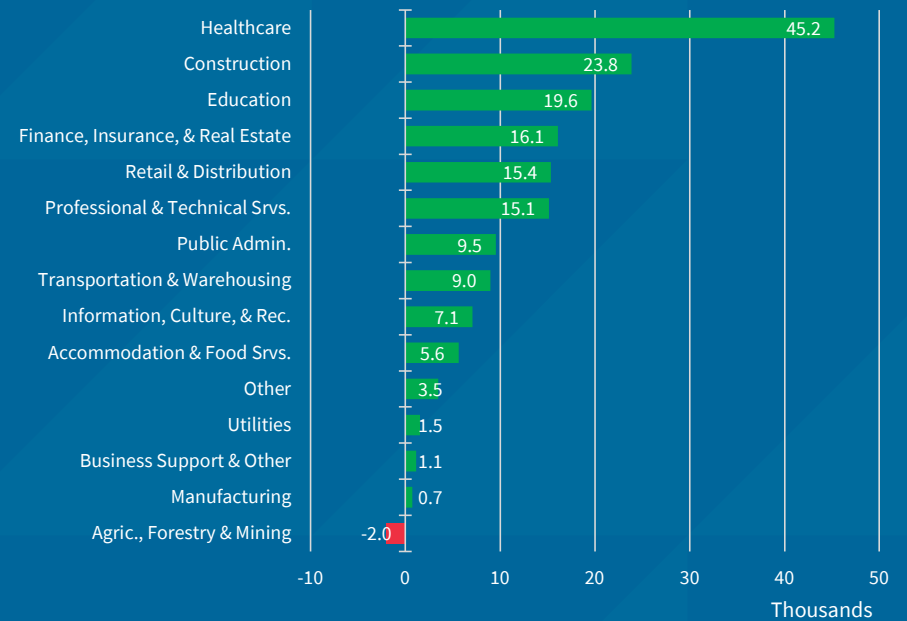
Source: CMHC Starts and Completions Survey

Employment and Jobs

Winnipeg CMA Total Employment



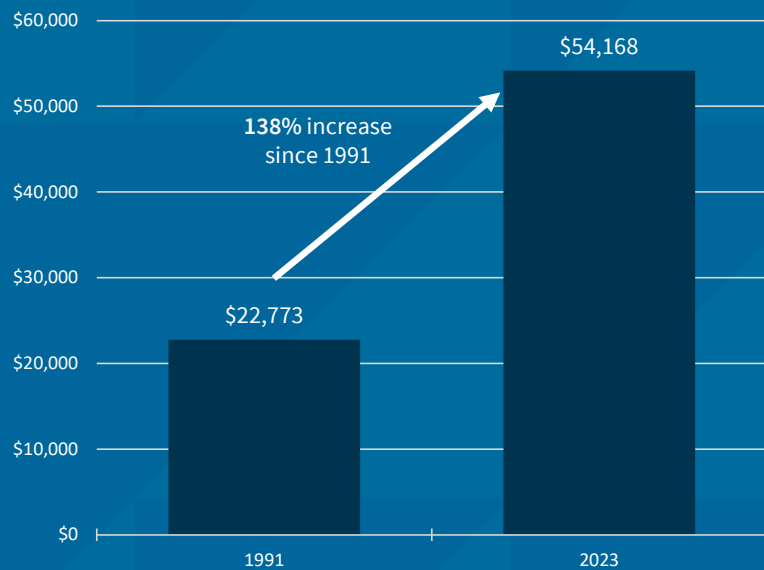
Winnipeg CMA Change in Employment by Industry, 1997 to 2025



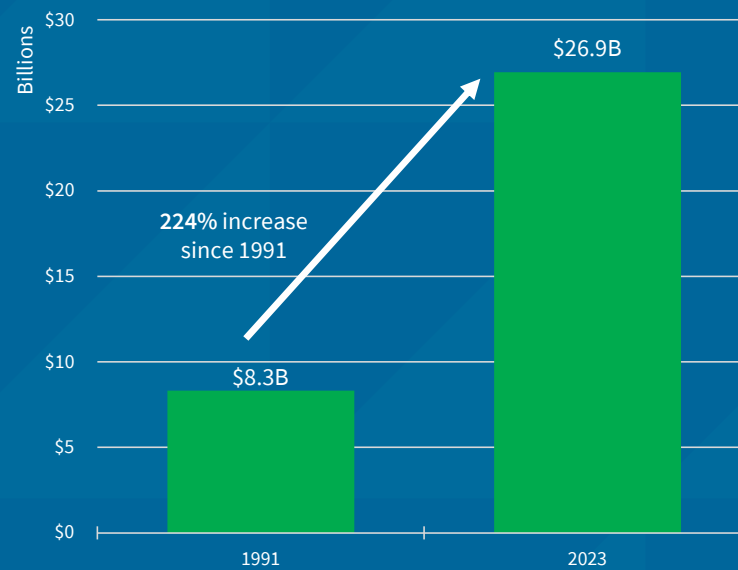
Source: Statistics Canada; Oxford Economics March 2026 National Economic Outlook; City of Winnipeg Economic Development & Policy calculations

Income

Winnipeg CMA Average Employment Income



Winnipeg CMA Aggregate Employment Income

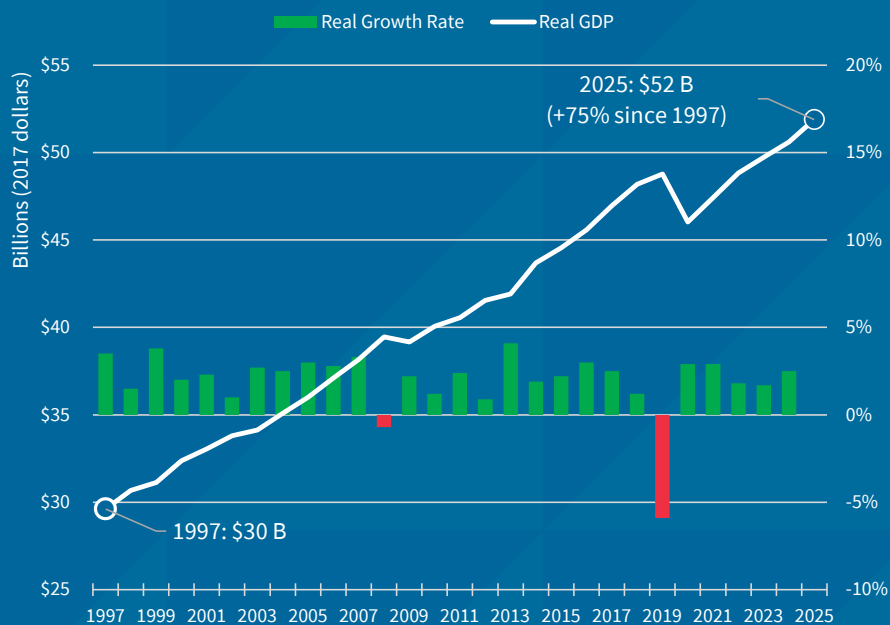


Source: Statistics Canada 1991 Census of Population; Statistics Canada, Table 11-10-0031-01 Labour Income Profile of Tax Filers by Sex

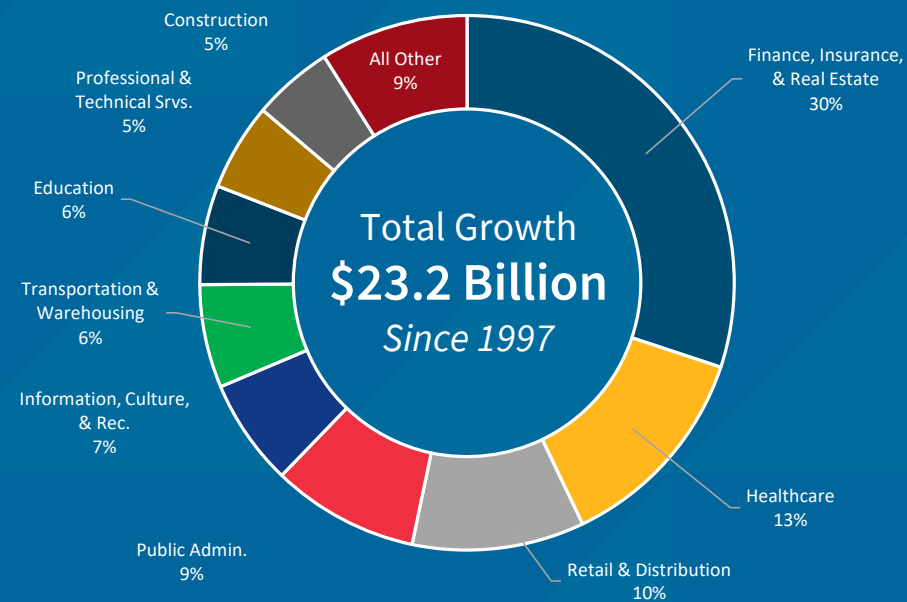
Economy

Real GDP Growth

Winnipeg CMA Real GDP Growth



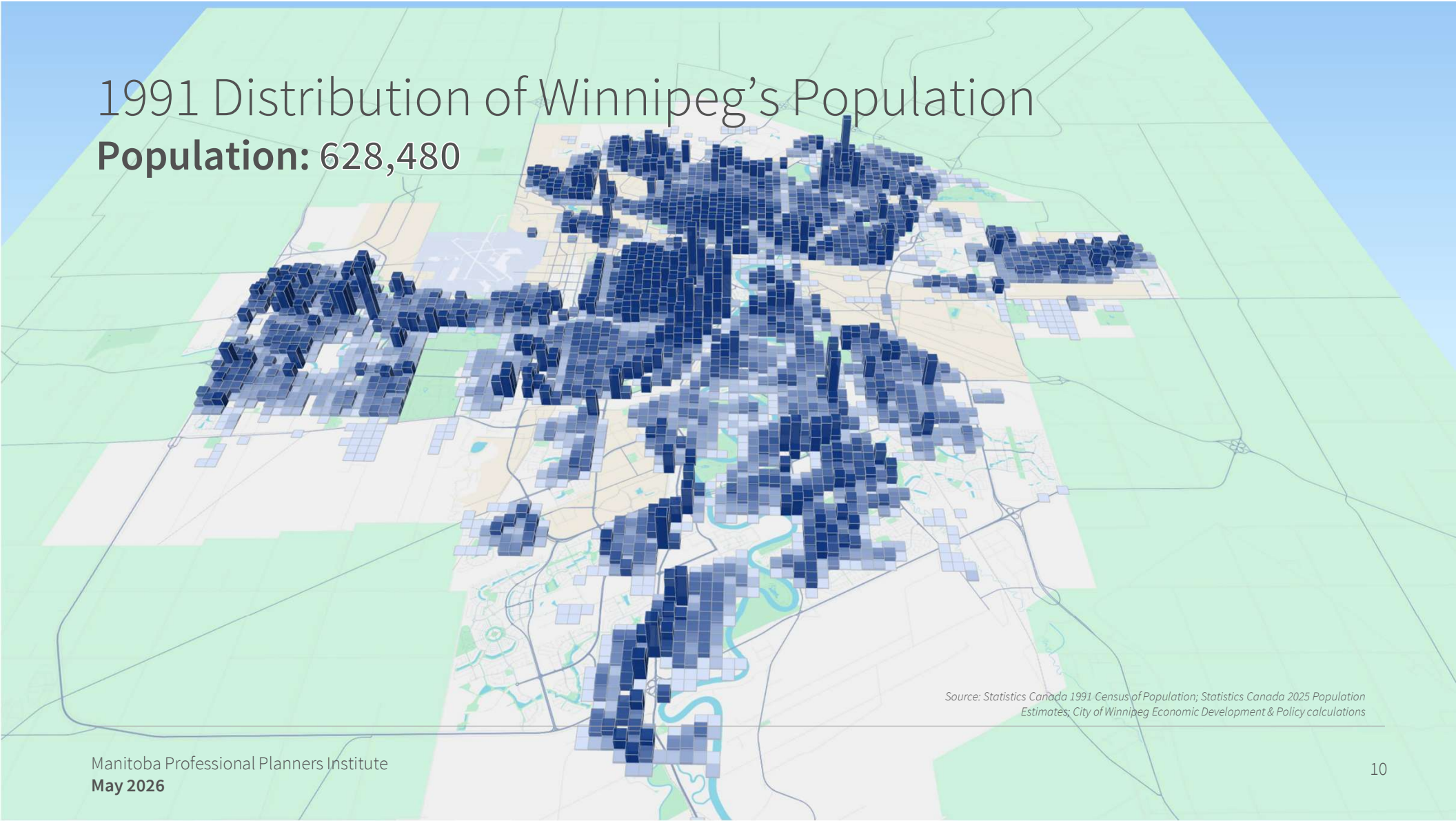
Distribution of Growth by Sector Since 1997



Source: Statistics Canada; Oxford Economics March 2026 National Economic Outlook; City of Winnipeg Economic Development & Policy calculations

1991 Distribution of Winnipeg's Population

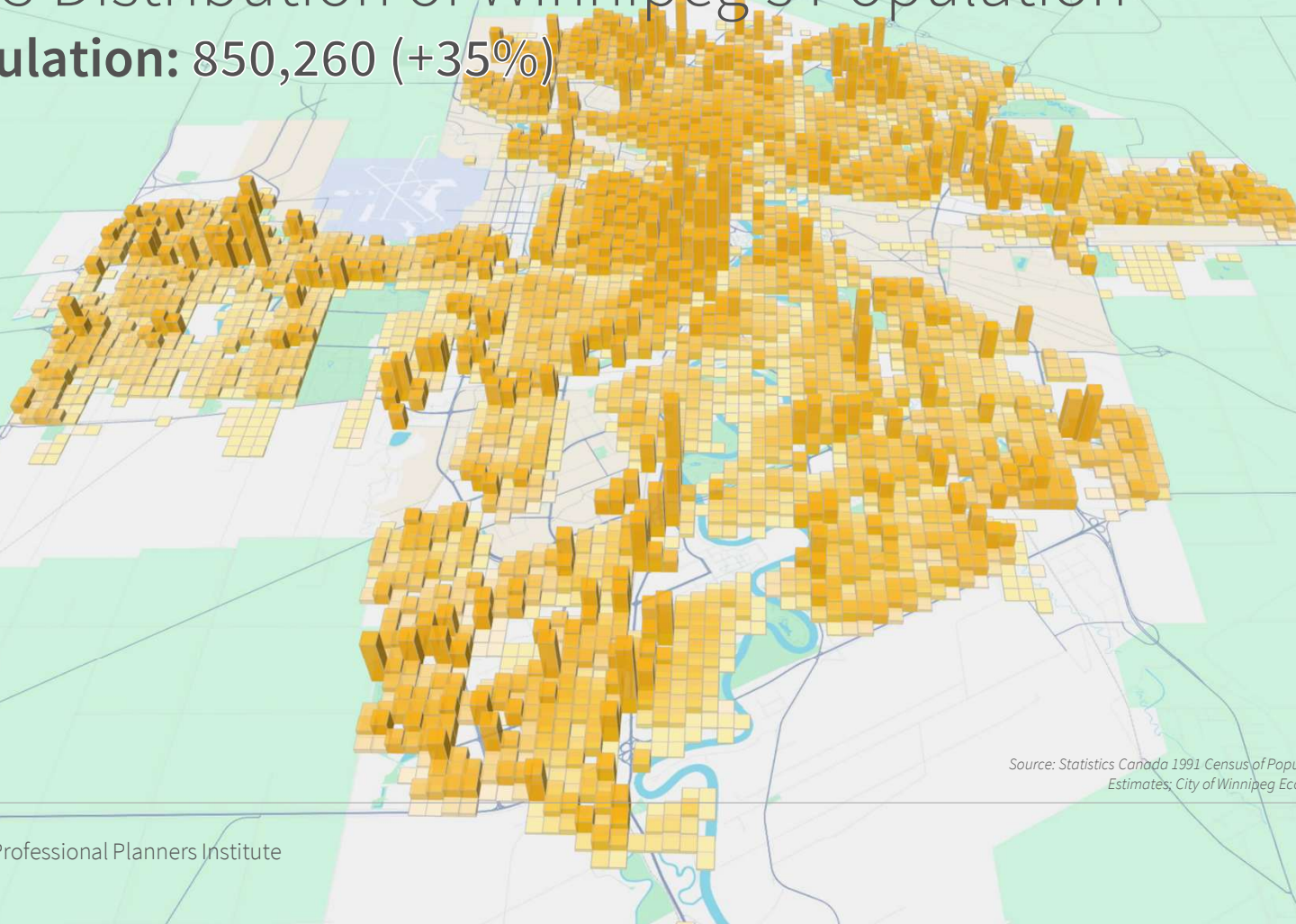
Population: 628,480



Source: Statistics Canada 1991 Census of Population; Statistics Canada 2025 Population Estimates; City of Winnipeg Economic Development & Policy calculations

2025 Distribution of Winnipeg's Population

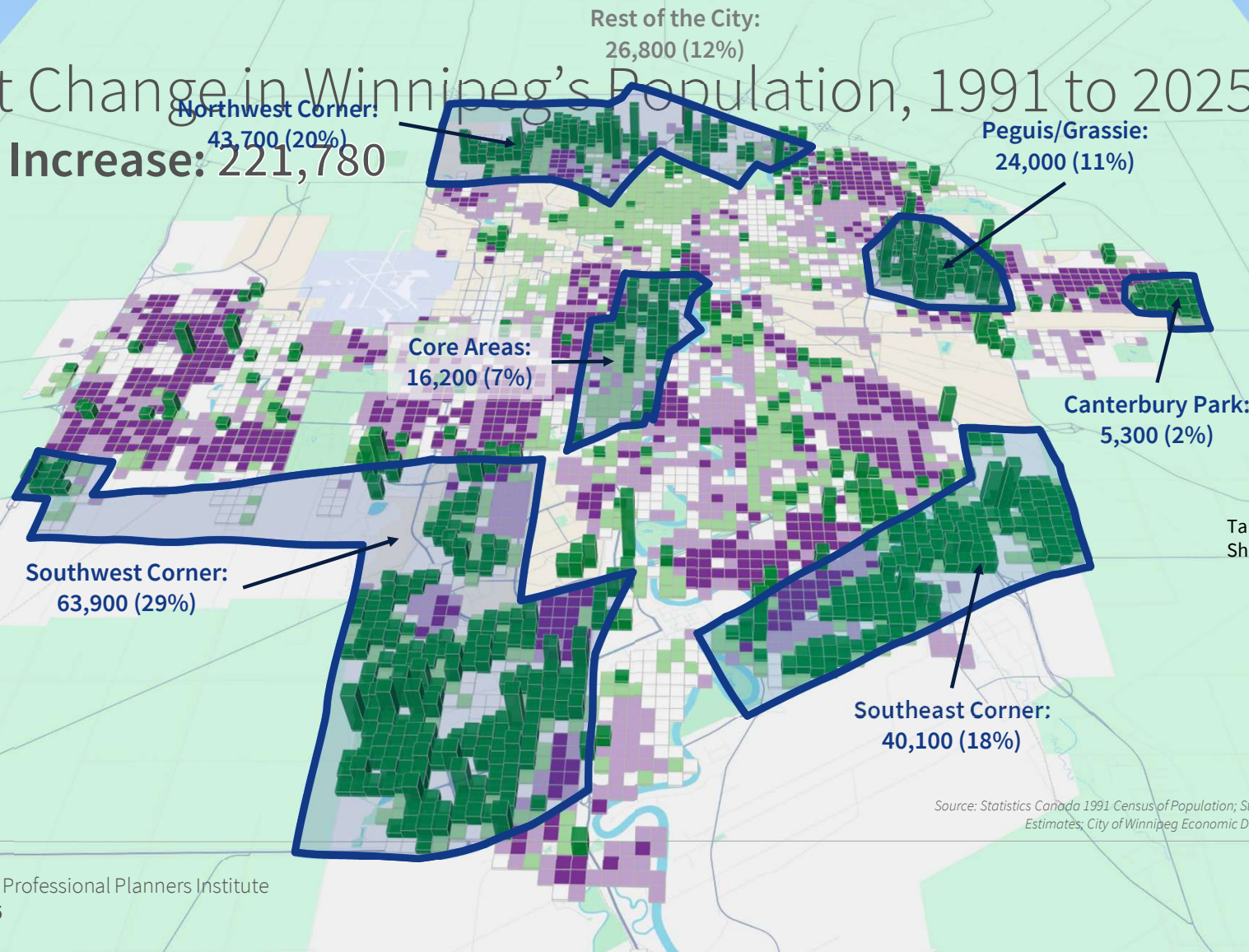
Population: 850,260 (+35%)



Source: Statistics Canada 1991 Census of Population; Statistics Canada 2025 Population Estimates; City of Winnipeg Economic Development & Policy calculations

Net Change in Winnipeg's Population, 1991 to 2025

Net Increase: 221,780



Map Legend (Population Change)

- 89 to 1,695
- 15 to 89
- 0 to 15
- 13 to 0
- 13 to -318

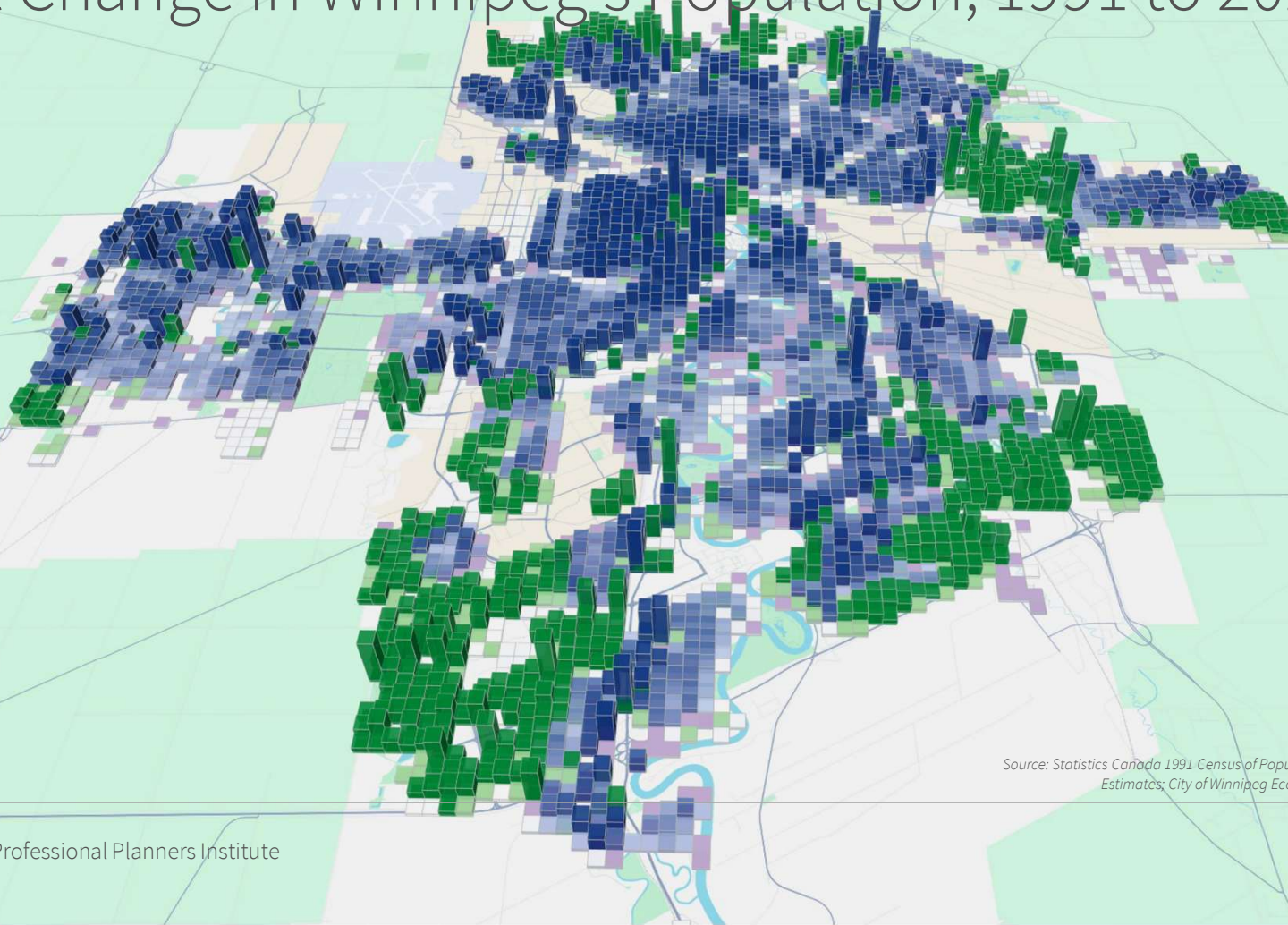
Taller Blocks = Higher Population
Shorter Blocks = Lower Population

Source: Statistics Canada 1991 Census of Population; Statistics Canada 2025 Population Estimates; City of Winnipeg Economic Development & Policy calculations

Net Change in Winnipeg's Population, 1991 to 2025

Map Legend

- 1991 Population
- 2025 Population
- Lost Population

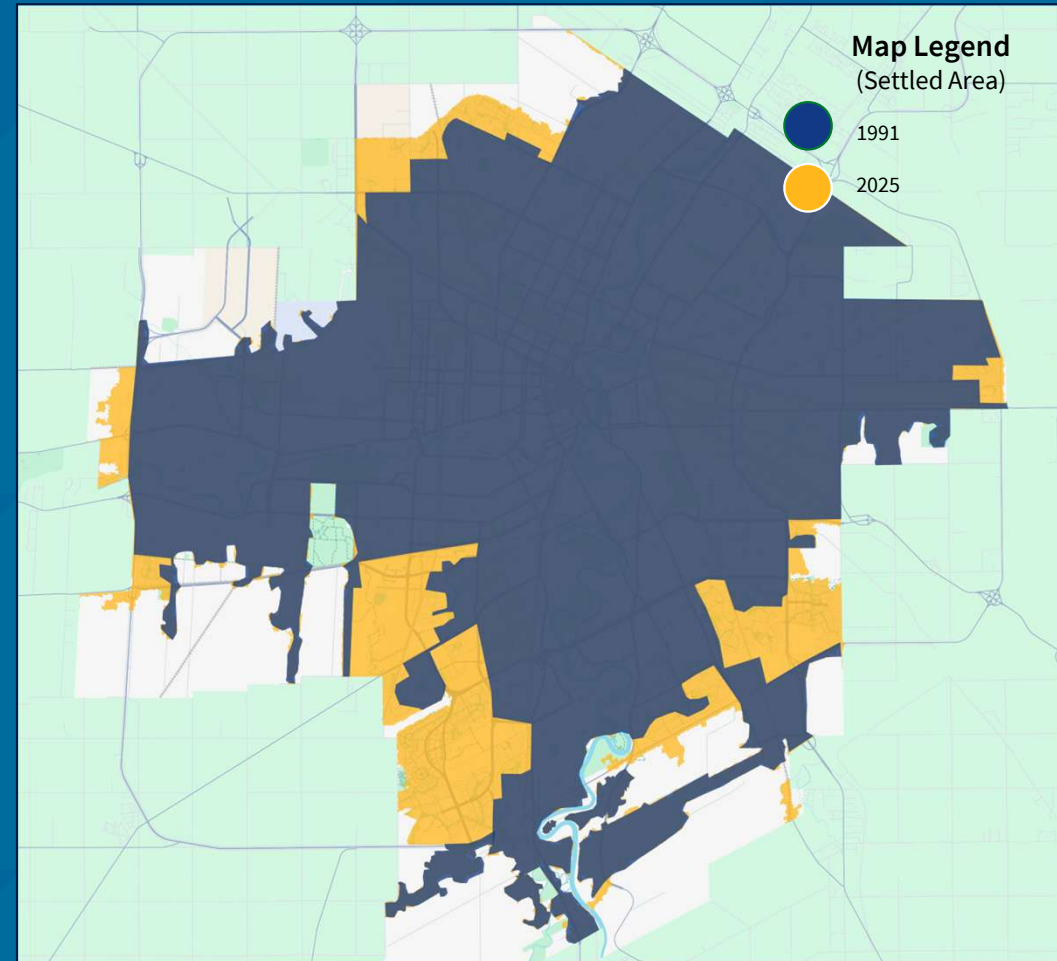


Source: Statistics Canada 1991 Census of Population; Statistics Canada 2025 Population Estimates; City of Winnipeg Economic Development & Policy calculations

Population by Contiguous Area Estimates

Time Period	Contiguous Settled Area (km ²)	Population	Density*
1991	317.3	628,480	1,981
2025	367.8	850,260	2,312
% Change	+16%	+35%	+16%

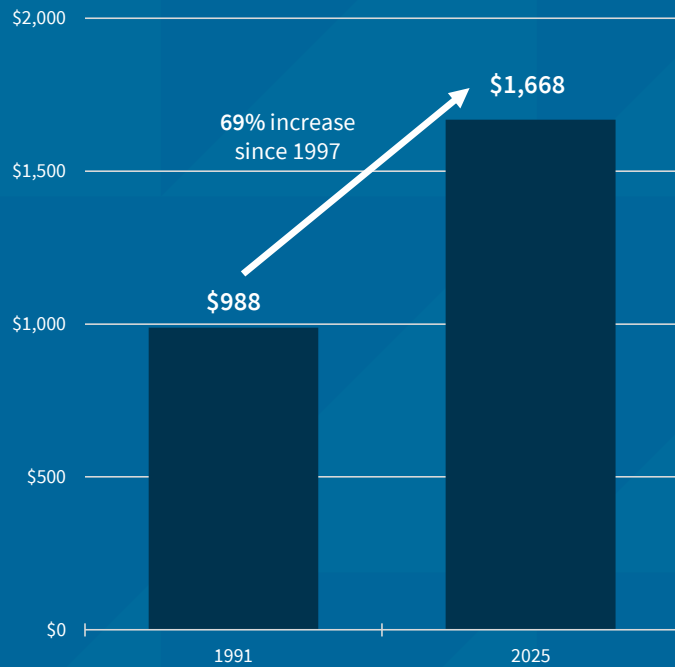
* Density represents estimated population per km²



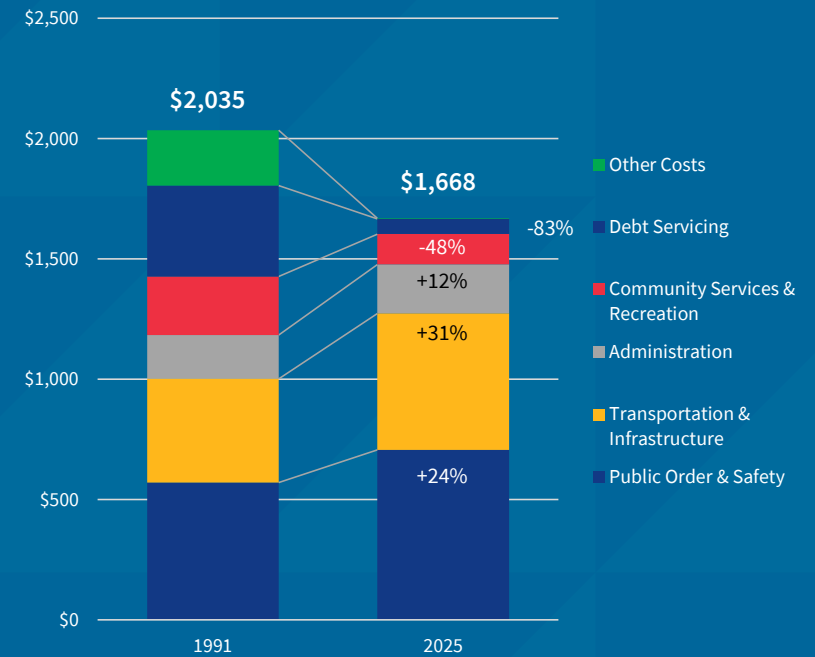
Source: Statistics Canada 1991 Census of Population; Statistics Canada 2025 Population Estimates; Statistics Canada Contiguously Settled Areas: Boundaries and User Documentation (16-510-X); City of Winnipeg Economic Development & Policy calculations; City of Winnipeg 2026 Assessment Parcels dataset

Municipal Expenditures

Per-Capita Tax-Supported Expenditures (Nominal Dollars)



Per-Capita Tax-Supported Expenditures (2025 Dollars)



Source: Statistics Canada, Table 18-10-0005-01 Consumer Price Index, annual average, not seasonally adjusted; Statistics Canada, Table 17-10-0155-01 Population estimates, July 1, by census subdivision, 2021 boundaries; City of Winnipeg 1991 and 2025 Tax-Supported Operating Budget documents

A Summary of Winnipeg's Growth Since the 1990s

Since 1991:



Population has increased by 36%
(225,060 people)



Housing stock has increased by 40%
(97,128 dwelling units)



Average employment income has increased by 138%
(\$31,000)



Consumer prices have increased by 106%



Contiguous settled area has increased by 16%
(50.5 km²)

Since 1997:



Real Gross Domestic Product (GDP) has increased by 75%
(\$22.3B)



Employment/Jobs have increased by 50%
(171,410 employed)



Section 2

Why Growth Matters and Why it is a Challenge

Why Growth Matters

There are many reasons why we, as a society, may want to see continued growth in population.

While there are many different perspectives, this section will briefly touch on three topics:

1. Diversity
2. Economic Growth
3. Demographics

Why Growth Matters

Diversity

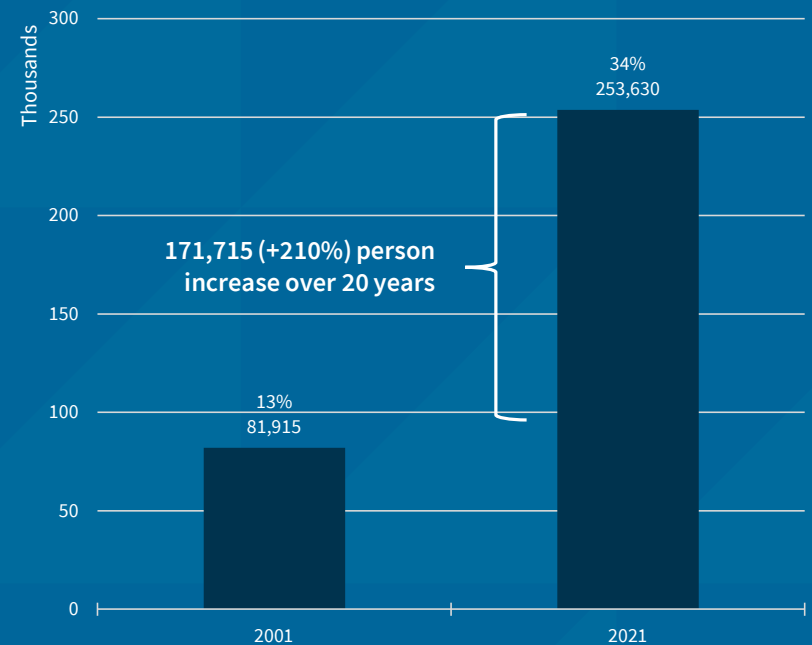
In general, having a diverse and multicultural population can have many benefits, including:

- Introducing and sharing new ideas and entrepreneurship ¹
- Sharing of cultural customs, festivals, cuisine, and products
- Increased quality of life in urban centres (economic well-being, social well-being, healthy living, urban mobility) ²
- Growth and diversity is often a building block for achieving city's land use and development objectives.

Sources:

1. Picot and Ostrovsky. (2021). "Immigrant entrepreneurs in Canada: Highlights from recent studies." Statistics Canada, Catalogue no. 36-28-0001
2. Wallace and Wu. (2019). "Immigration and the quality of life in U.S. metropolitan areas." The Social Science Journal, 56(4).
3. Statistics Canada, 2001 and 2021 Census of Population

Visible Minority Population in Winnipeg: 2001 and 2021 Census³



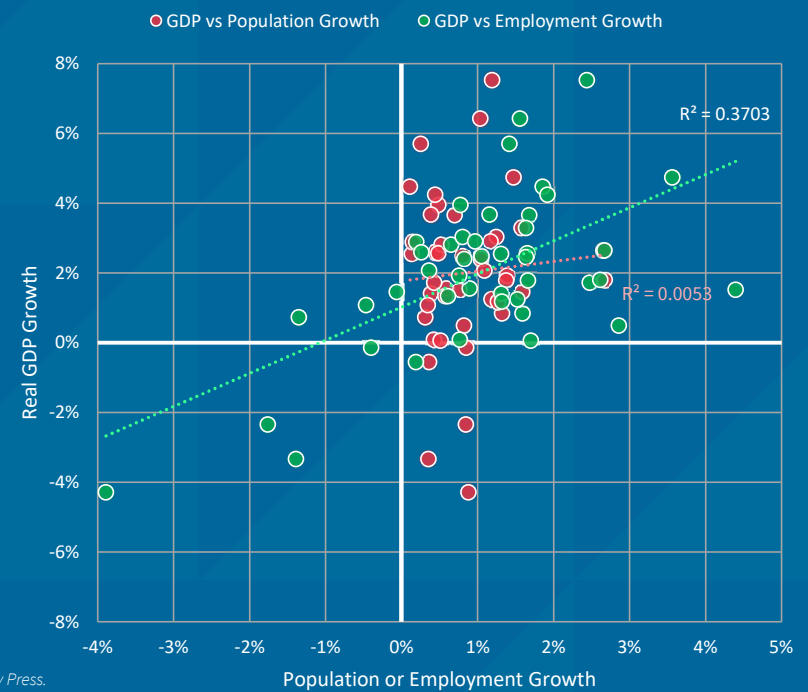
Why Growth Matters

Economic Growth

Population growth (namely via immigration) is a key driver of economic growth, but the relationship is nuanced.

- Canada's immigration system is designed to actively recruit skilled immigrants as permanent residents and future citizens.¹
- While first-generation immigrants face significant transition costs, second-generation immigrants do very well in the labour market.
- Immigration is also linked to productivity growth.²

Manitoba: Real GDP Growth vs. Population/Employment Growth 1982 to 2025³



Sources:

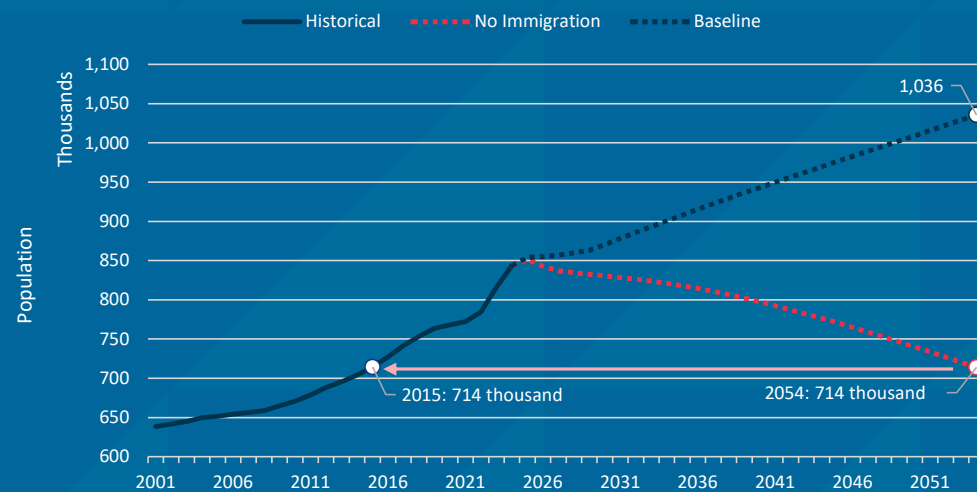
1. Banting and Kymlicka. (2006). "Multiculturalism and the Welfare State: Recognition and Redistribution in Contemporary Democracies." Oxford University Press.
2. Ottaviano and Peri. (2006). "The Economic Value of Cultural Diversity: Evidence from US Cities." *Journal of Economic Geography*, 6(1)
3. Statistics Canada; Oxford Economics; City of Winnipeg Economic & Development calculations

Why Growth Matters

Demographics

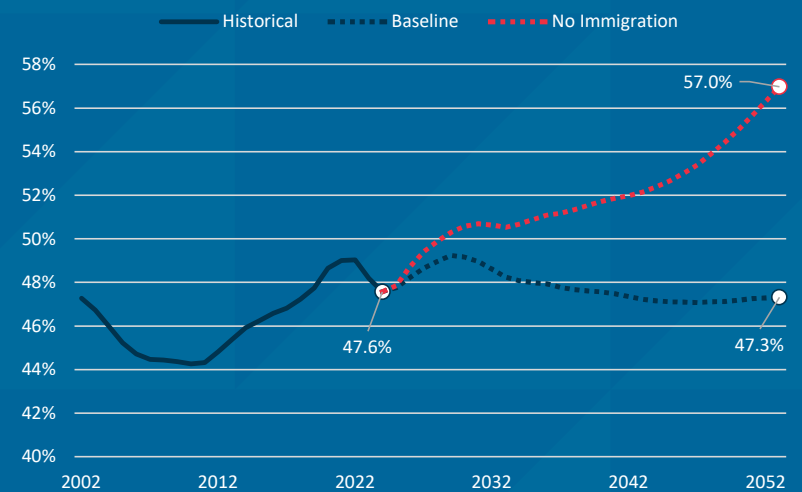
Falling fertility in developed economies is increasing reliance on immigration to sustain population growth and maintain a balanced age structure. Without it, a rising “demographic dependency ratio” places greater pressure on a shrinking working-age population.

Winnipeg's Population With and Without Immigration



Source: Statistics Canada; City of Winnipeg Economic Development & Policy calculations

Winnipeg's Dependency Ratio With and Without Immigration

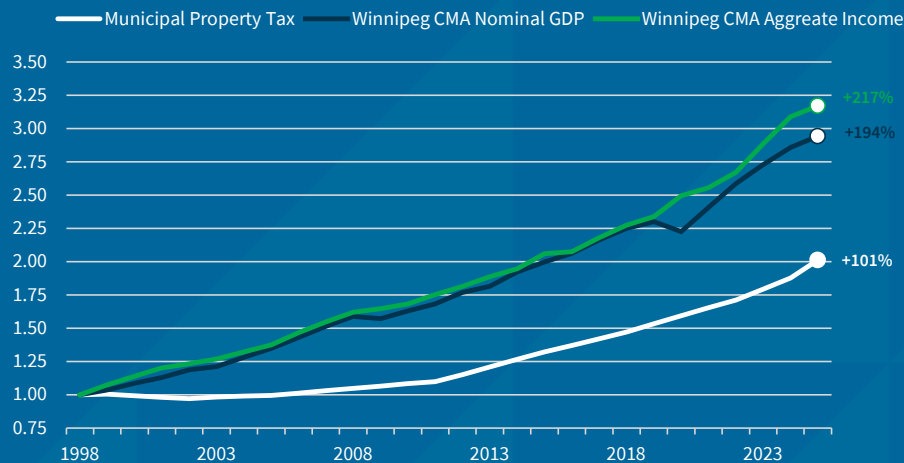


Challenges with Growth

Municipal Fiscal Capacity

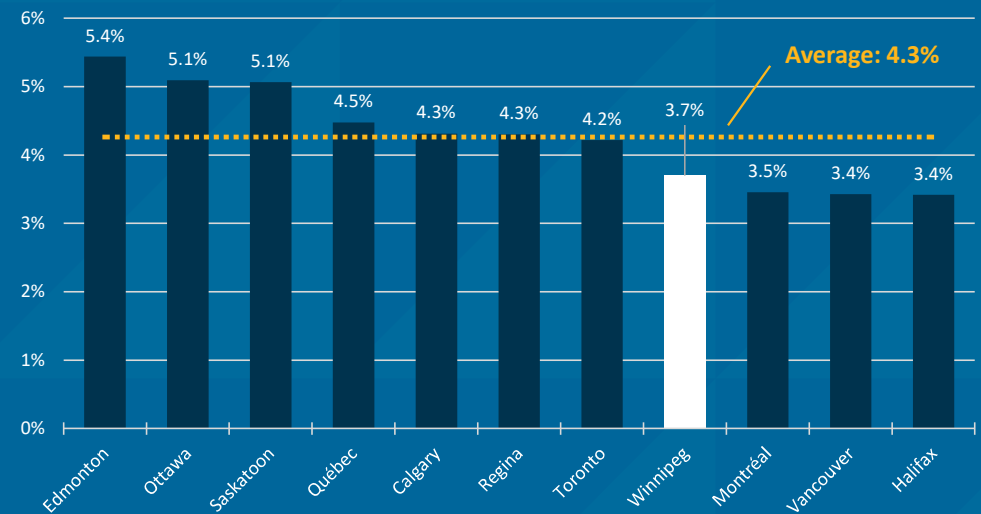
Municipal fiscal capacity is largely a function of tax rates and fees set by councils. The largest source of revenue, property taxes, doesn't automatically grow with inflation or the economy – unlike federal and provincial revenue, such as income taxes or PST/GST.

Indexing Winnipeg's Property Tax vs. Wage and Economic Growth



Source: Statistics Canada; Oxford Economics; City of Winnipeg Economic Development & Policy calculations

Municipal Revenue as % of Municipal GDP in 2024



Challenges with Growth

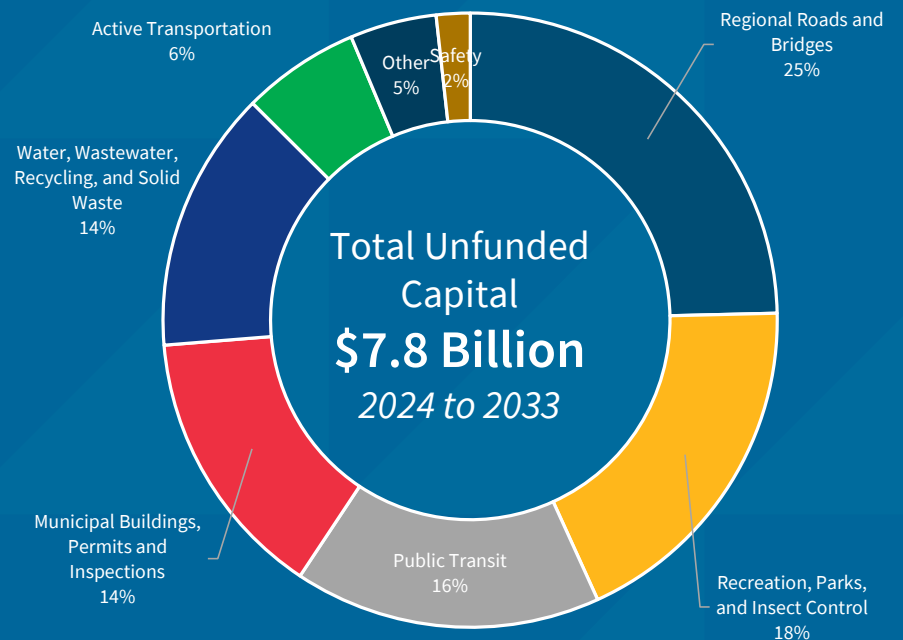
Infrastructure

Growth requires infrastructure to enable and support it, and it is expensive.

- Estimated unfunded infrastructure needs total **\$7.8 billion** over the next 10 years.
- City working to fund, design, and construct the largest capital project in Winnipeg's history (North End wastewater treatment plant).
- Solid waste, water treatment, wastewater, roads and bridges tend to have the most funding forecasted whereas recreation, libraries, active transportation, and municipal building improvements have the least.

Source: City of Winnipeg 2024 Infrastructure Plan

Winnipeg's Unfunded Capital Needs, Next 10 Years



Challenges with Growth

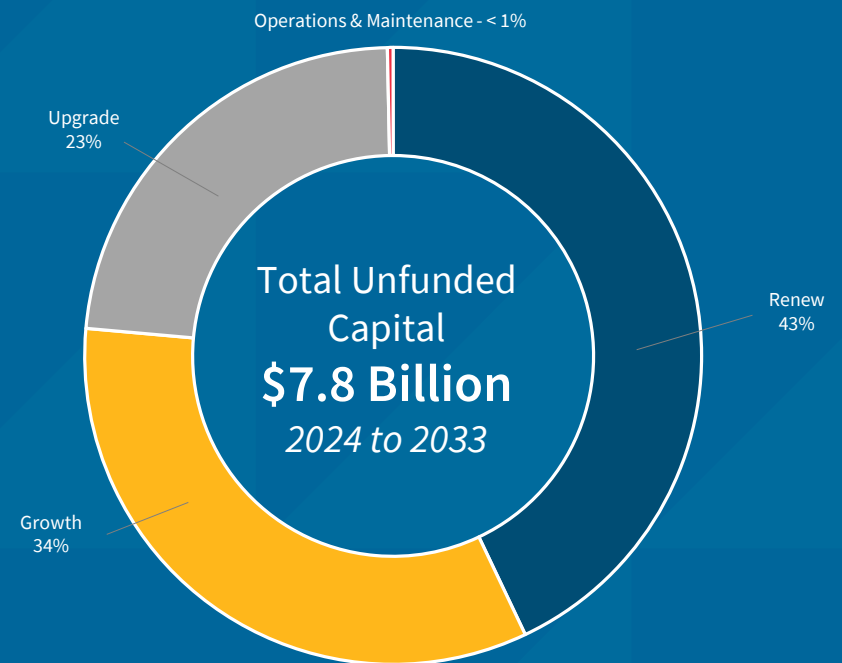
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Source: City of Winnipeg 2024 Infrastructure Plan

Winnipeg's Unfunded Capital Needs, Next 10 Years



Challenges with Growth

Development resistance



The screenshot shows the top navigation bar of the Calgary Herald website. It includes a menu icon, 'Sections', a search icon, 'Search', the 'CALGARY HERALD' logo, a 'Subscribe \$12 for 1 year' button, and a 'Sign In' link. Below the navigation bar is a breadcrumb trail: 'Home / News / Local News'. The main headline reads 'City council passes first reading of bylaw to repeal blanket rezoning'. Below the headline is a sub-headline: 'The vote comes after thousands of Calgarians weighed in during a two-week public hearing that wrapped Tuesday'.

Sections Search CALGARY HERALD Subscribe \$12 for 1 year Sign In

Home / News / Local News

City council passes first reading of bylaw to repeal blanket rezoning

The vote comes after thousands of Calgarians weighed in during a two-week public hearing that wrapped Tuesday



Section 3

Growth Management Goals

Winnipeg's Growth Management Goals

Intensification

Infill:

- Supports sustainable transportation and preserves greenfield land.
- Improves existing housing stock in existing neighbourhoods.
- Adds residents to support local amenities.
- Lessens the need for additional infrastructure.

Intensification target

Aim for a minimum of 50% of all new dwelling units to be located in the intensification target area.

Aim to establish a minimum of 350 new dwelling units per year Downtown until 2030, and 500 units per year after 2030.

Source: Text



Winnipeg's Growth Management Goals

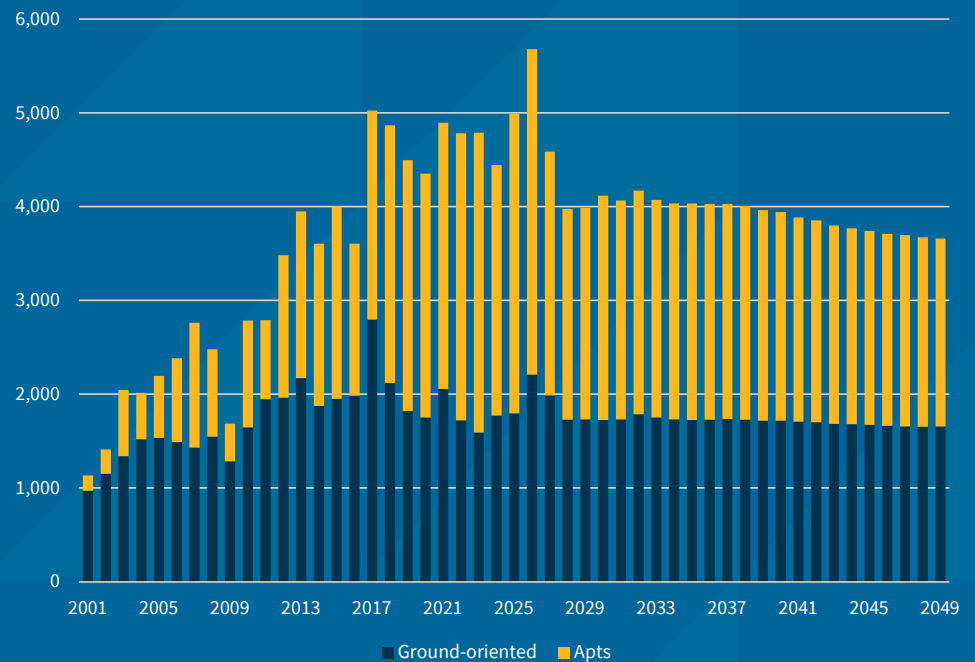
Greenfield

Greenfields:

- Provide a large, reliable source of land to accommodate housing.
- Are needed to provide ground-oriented housing – single-detached, semi-detached, and rowhousing. Tend to be more suitable for larger households.

Despite dramatic growth in the share of apartment units, there is still demand for 1,700 ground-oriented units a year over the next 25 years.

Historical and forecasted housing, by type



Winnipeg's Growth Management Goals

Greenfield

Greenfield land supply policies

- Maintain a five-to-seven year supply of vacant serviced greenfield land
 - And a three-to-five year supply where all growth-enabling infrastructure is installed and the subdivision by-law is approved.
- Maintain approximately a 10-year supply of planned greenfield land.
- Provide for timely capital infrastructure and local area plans to enable and support the full build-out of greenfield lands in accordance with land supply policies and the greenfield phasing plan.
- Endeavour to provide a reasonable land supply in each quadrant of the city.





Section 4

Ongoing Monitoring of Development Trends and Land Supplies

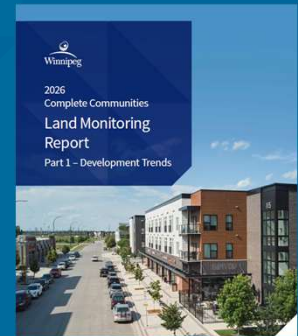
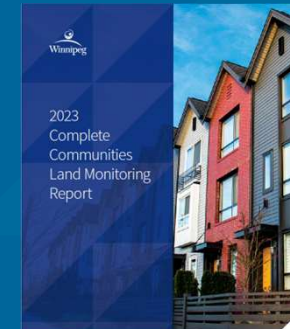
Tracking Progress

Greenfield

Ongoing land monitoring

5.2 (A) Report annually to Council on:

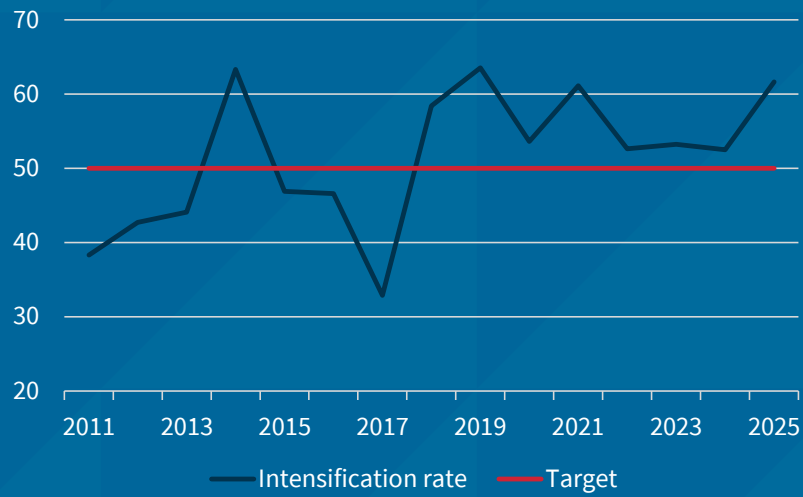
- Residential development patterns and the City's progress towards achieving the intensification target;
- Actions undertaken by the City in the previous year aimed at achieving the intensification target;
- The supply of vacant serviced and planned greenfield land;
- Changes to conditions described in the table of Greenfield Development Opportunities and Constraints; and
- Other contextual economic measures as appropriate.



Development Trends

Intensification rate

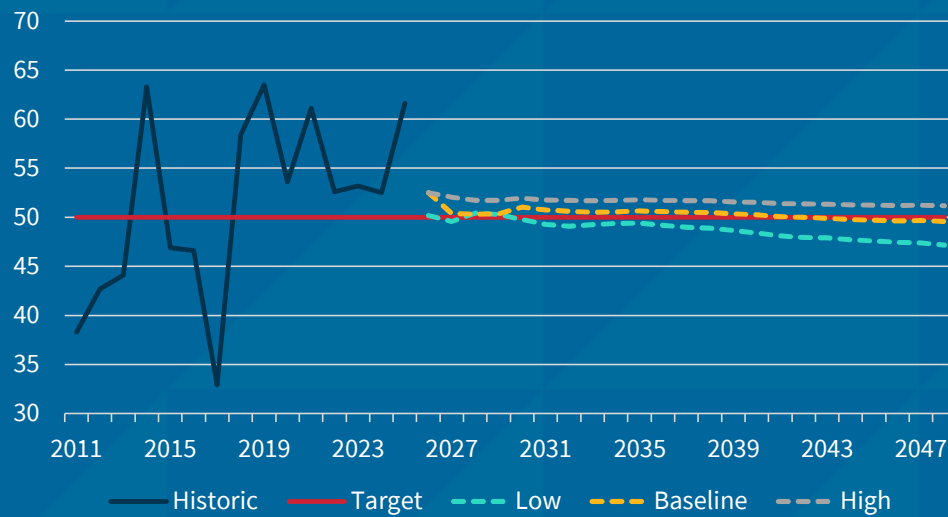
The City has surpassed its 50% target every year since 2018, after having done so only once prior.



Development Trends

Intensification rate

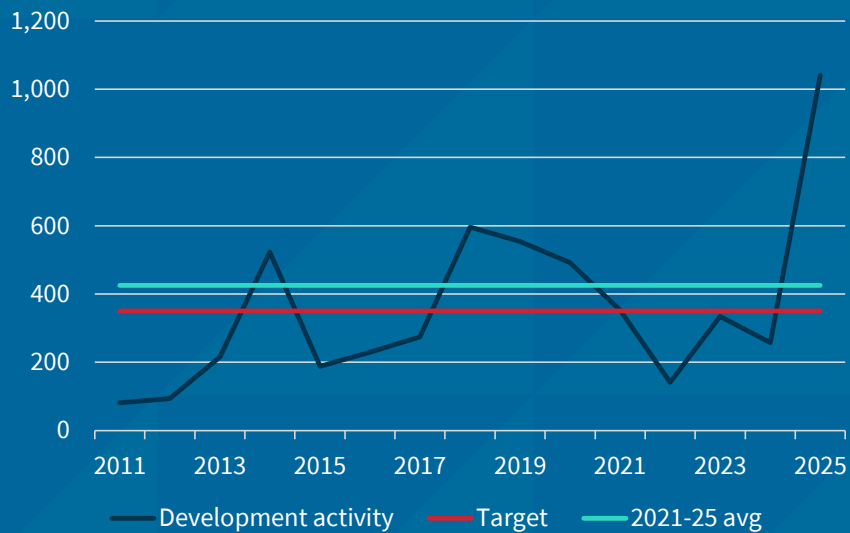
This level of intensification is expected to continue, only tapering off slightly in the long-term.



Development Trends

Downtown development

2025 saw unprecedented levels of Downtown development, with the City having issued permits for 1,040 new units.

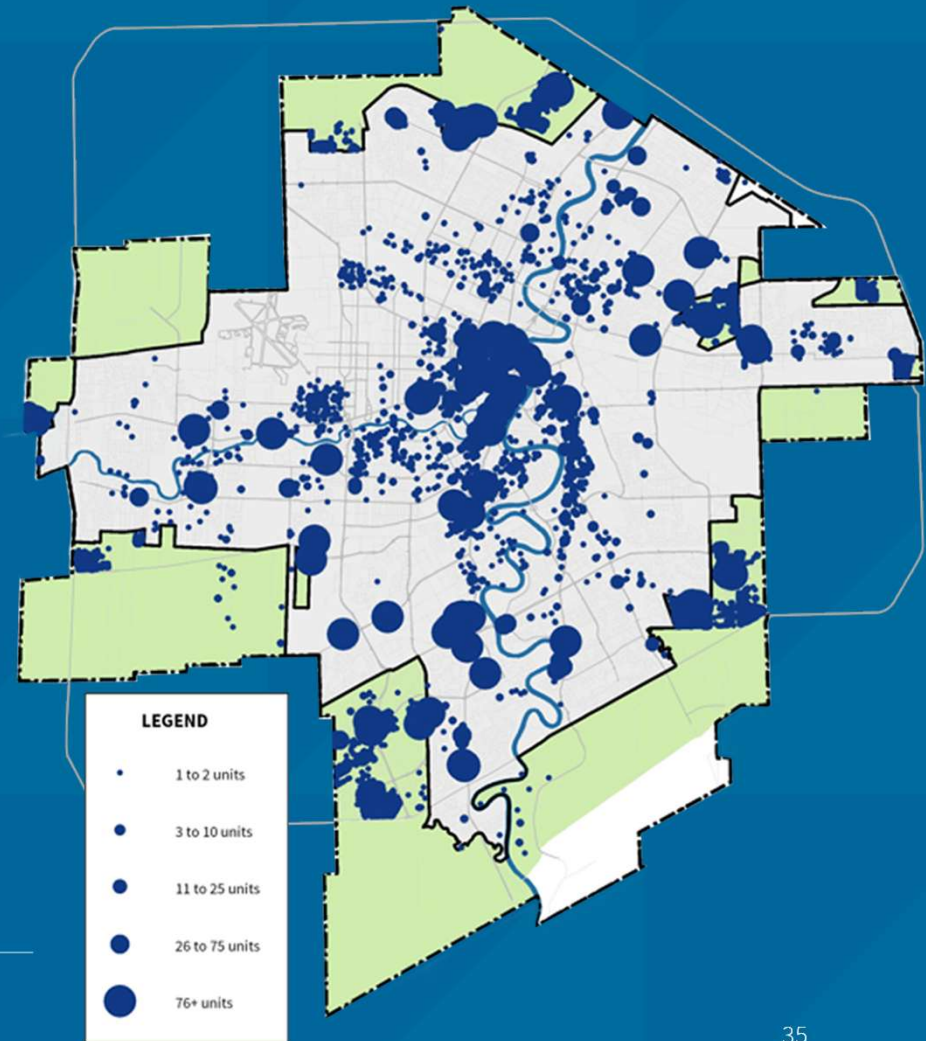


Development Trends

By Urban Structure

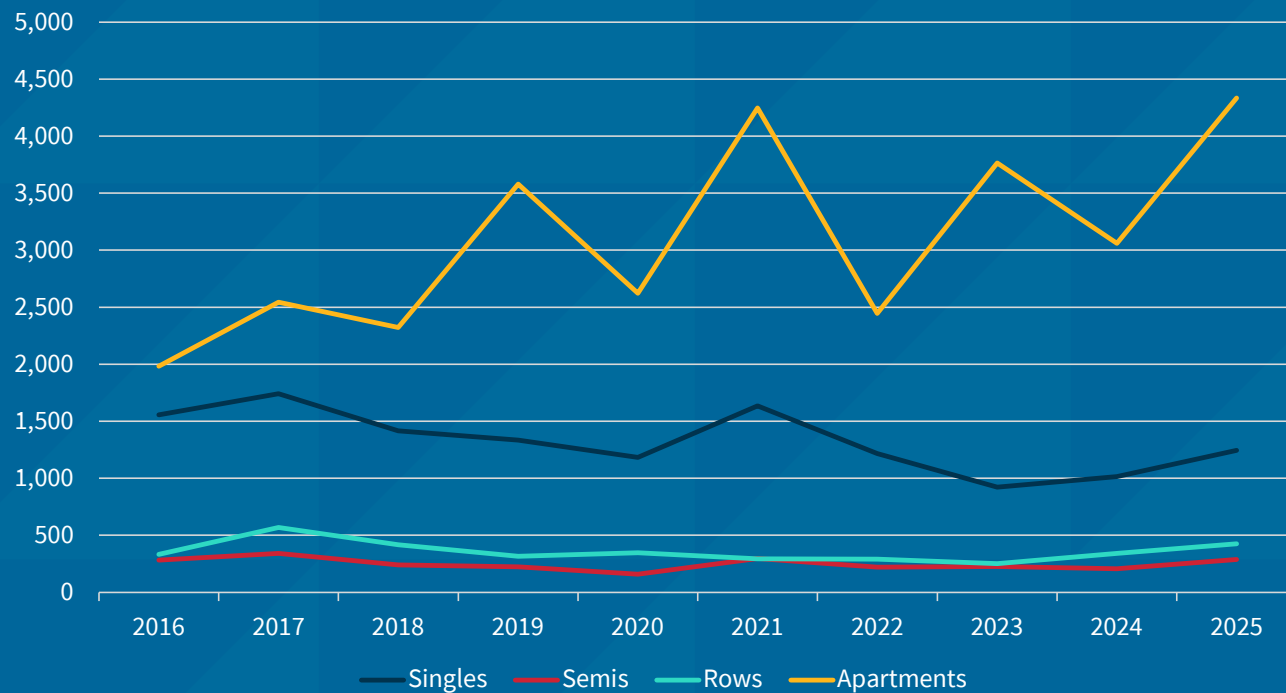
New dwelling units created, infill neighbourhoods, 2021-25 – Top 10

1. Chevrier
2. South Portage
3. River-Osborne
4. Richmond West
5. Eglemere
6. Regent
7. Beaumont
8. St Matthews
9. Civic Centre
10. Centennial



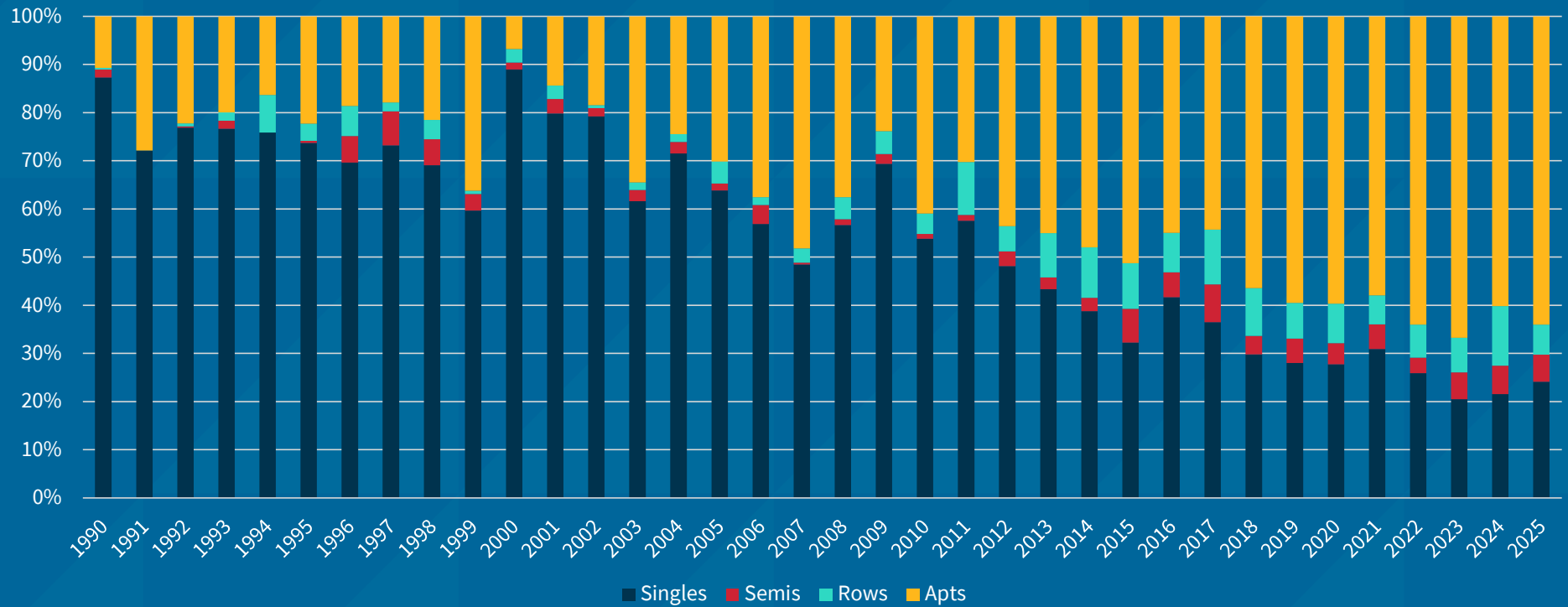
Development Trends

Development by dwelling types



Development Trends

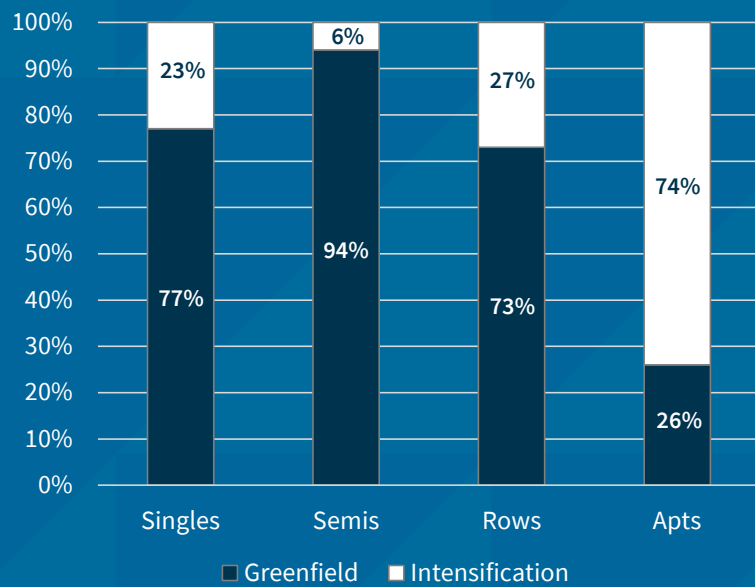
Development by dwelling types



Development Trends

Development by dwelling types

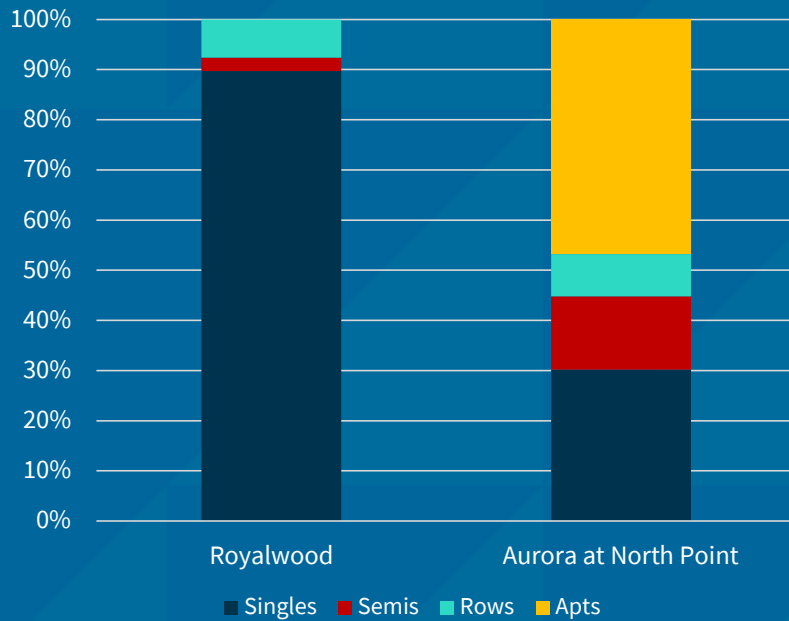
% of new dwellings in infill vs greenfield areas, by type



Development Trends

Development by dwelling types

% of new dwellings in infill vs greenfield areas, by type

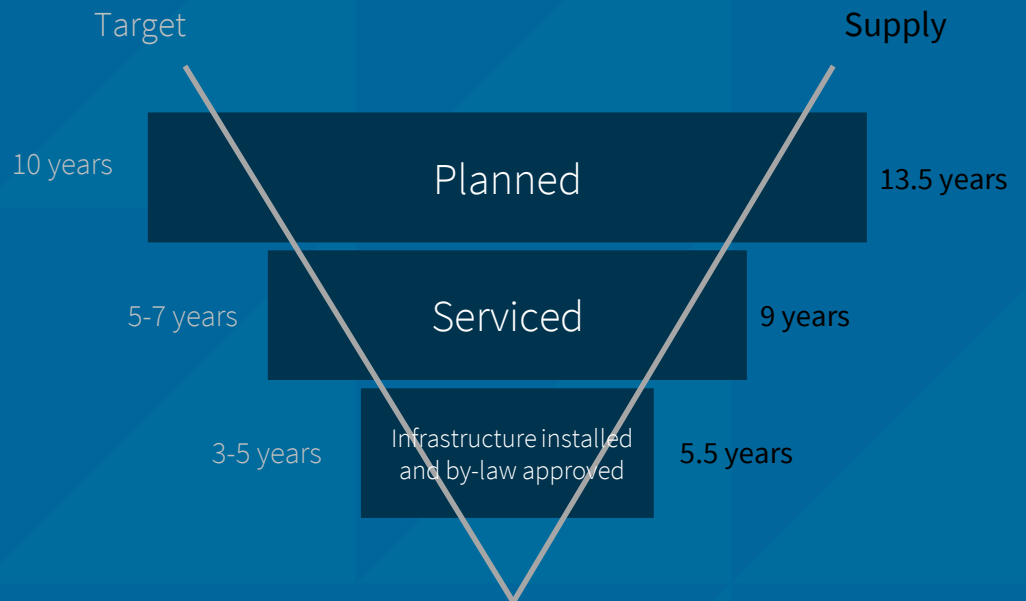


Land Supplies

Greenfield residential

As of January 1, 2025, the City currently has a healthy supply of greenfield land in that supplies exceed Council's targets.

However, Council will need to invest in infrastructure soon to maintain this.



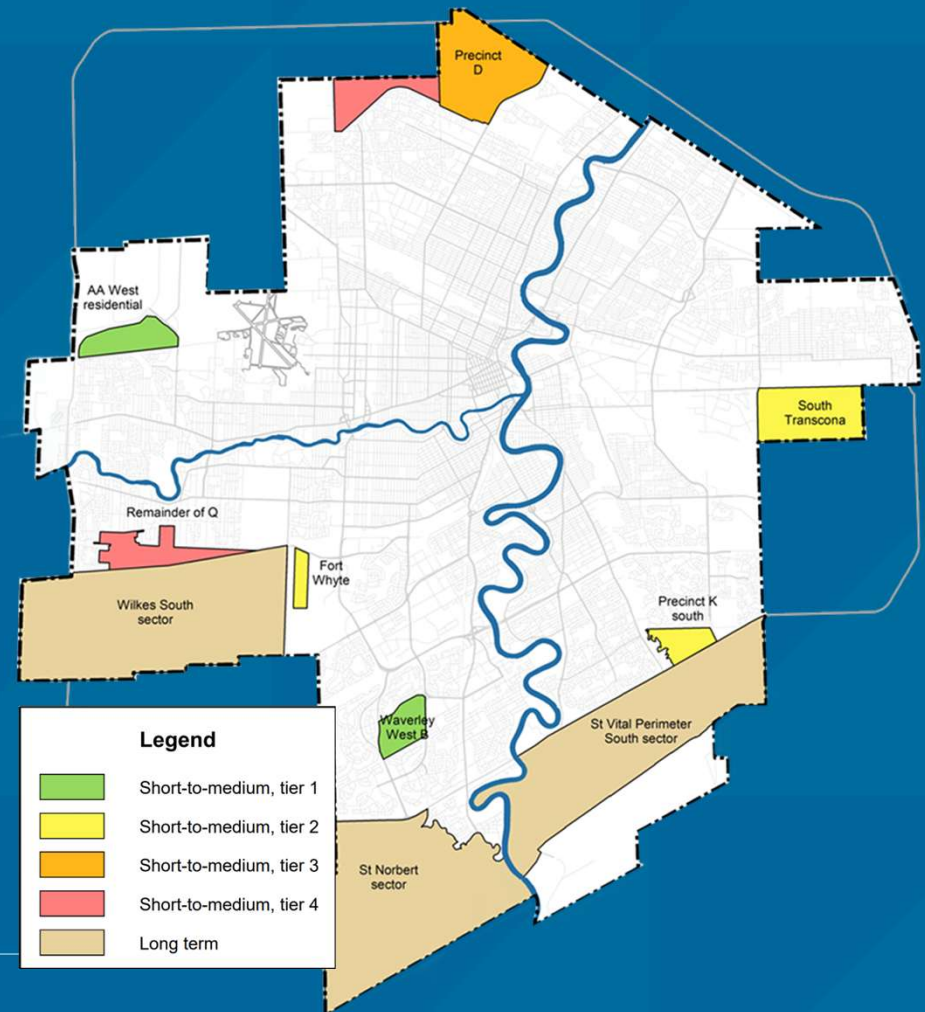
Land Supplies

Greenfield residential

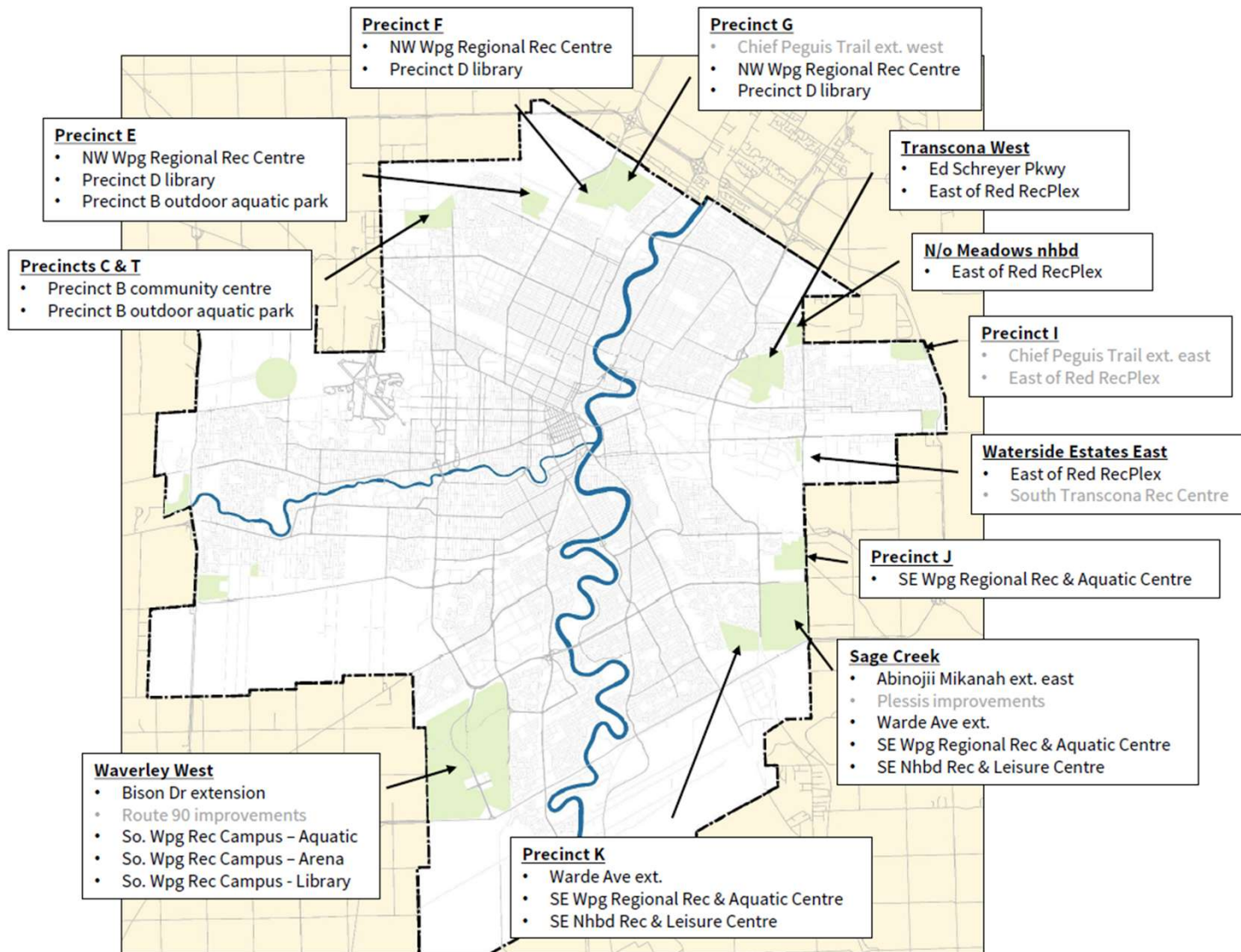
Warde Ave extension will need to be funded by 2028 to be in place by 2033.

However, the South End Sewage Treatment Plant may reach capacity by the early 2030s.

Alternatively, the City could fund the Chief Peguis Trail extension by 2027 to be in place by 2033.



	Short-to-medium term								Long term		
	AA West Residential (CentrePort South)	Waverley West B	Precinct K South	Remainder Precinct Q	South Transcona	Fort Whyte	Precinct D	Precinct B	Wilkes South sector	St. Vital Perim. South sector	St. Norbert sector
Quadrant	West	Southwest	Southeast	Southwest	Northeast	Southwest	Northwest	Northwest	Southwest	Southeast	Southwest
Potential Units	4,340	2,970	1,810	2,470	4,960	1,490	11,650	4,080	34,030	15,080	22,280
Precinct plan status	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan approved	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required	Precinct plan required
Sector plan status	-	-	-	-	-	-	-	-	Sector plan required	Sector plan required	Sector plan required
Precinct plan priority	-	-	-	-	1	1	2	3	4	4	5
Sector plan priority	-	-	-	-	-	-	-	-	1	1	2
Servicing priority	1	1	2	4	2	2	3	4	5	5	6
Anticipated growth-enabling infrastructure	<ul style="list-style-type: none"> CentrePort South Water and Sewer Servicing Phase 1A (funded) Water and sewer servicing phases 1B+ NW wastewater interceptor system upgrade 	<ul style="list-style-type: none"> Southwest interceptor (funded) 	<ul style="list-style-type: none"> Warde Ave extension (Lagimodiere to St Anne's) 	<ul style="list-style-type: none"> Clement Parkway (Grant to Ridgewood), including Elmhurst/Wilkes and Fairmont/Wilkes intersection improvements 		<ul style="list-style-type: none"> Southwest interceptor (funded) 	<ul style="list-style-type: none"> Chief Peguis Trail (2027) McPhillips corridor improvements Pipeline corridor improvements McPhillips & Leila intersection improvements Pipeline & Leila intersection improvements 	<ul style="list-style-type: none"> Chief Peguis Trail (2027) NW wastewater interceptor system extension Pipeline corridor improvements King Edward corridor improvements Pipeline & Leila intersection improvements 	<ul style="list-style-type: none"> Clement Parkway (Ridgewood to Abinonji Mikanah) Wilkes Ave corridor improvements Shaftesbury/Wilkes/railway intersection improvements McCreary Rd corridor improvements McGillivray Blvd corridor improvements Wastewater interceptor Water feeder main 	<ul style="list-style-type: none"> Wastewater interceptor Water Feeder Main 	<ul style="list-style-type: none"> Wastewater interceptor Water Feeder Main Kenaston/Waverley intersection improvements Kenaston (PTH 100 to Abinonji Mikanah) corridor improvements
Anticipated growth-supportive infrastructure	<ul style="list-style-type: none"> Silver Ave extension Sturgeon Rd (Saskatchewan to Ness) widening Sturgeon/Saskatchewan intersection improvements 	<ul style="list-style-type: none"> Facility Optimization – WW (fire) station (funded) So. Wpg Rec Campus Ph. 1 (funded) So. Wpg Rec Campus: Aquatic (2028) So. Wpg Rec Campus: Arena (2027) So. Wpg Rec Campus: Library (2028) Bison Dr extension 	<ul style="list-style-type: none"> Bonavista Recreation Centre (2026) Land acquisition for SE Wpg Regional Rec & Aquatic Centre (2030) SE Wpg Regional Rec & Aquatic Centre (2036) St Anne's widening (Aldgate to PTH 100) Abinonji Mikanah and St Anne's intersection improvements 	None	<ul style="list-style-type: none"> East of Red RecPlex (2026) Community/ rec centre Fire station Plessis widening Dugald widening Dugald & Lagimodiere intersection improvements 	<ul style="list-style-type: none"> Shaftesbury/Wilkes/railway intersection improvements Shaftesbury corridor improvements McCreary corridor improvements 	<ul style="list-style-type: none"> NW wastewater interceptor system extension Land acquisition for NW Wpg Regional Rec & Aquatic Centre (2031) NW Wpg Regional Rec & Aquatic Centre (2036) Library Fire station 	<ul style="list-style-type: none"> NW Wpg Regional Rec & Aquatic Centre (2036) Community/rec centre Library Outdoor aquatic park 	<ul style="list-style-type: none"> Community/rec centres Library Fire station 	<ul style="list-style-type: none"> SE Wpg Regional Rec & Aquatic Centre (2036) Library Fire station Dakota St extension Abinonji Mikanah and St Anne's intersection improvements Abinonji Mikanah and St Mary's intersection improvements Lagimodiere corridor improvements St Anne's corridor improvements St Mary's corridor improvements 	<ul style="list-style-type: none"> So. Wpg Rec Campus Ph. 1 (funded) So. Wpg Rec Campus: Aquatic (2028) Library Abinonji Mikanah and Kenaston intersection improvements Pembina corridor improvements
Site dependencies	None	None	None	Wilkes South sector plan needed before Clement Parkway can be planned as per Council motion Dec. 13, 2017	None	None	None	Precinct D is first – Chief Peguis Trail and wastewater extended from east.	Precinct Q is first – Clement Parkway extended from north.	None	St. Vital Perim. South. is first – wastewater extended from South End treatment plant. St Norbert By-Pass (Provincial project) may also be required.
Land assembly requirement	Some assembly	More assembly	More assembly	More assembly	More assembly	Assembled	Some assembly	Some assembly	More assembly	More assembly	Some assembly
Primary Transit Network	No planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	Planned connection	No planned connection	Planned connection	Planned connection	Planned connection
Decision-making guidance	Subdivision and rezoning applications may be submitted following completion of a precinct plan. Build-out may be limited by the need for growth-enabling infrastructure.				These sites will be the next priorities for precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.			Completion of sector plans are required before precinct planning. Noted growth-enabling infrastructure is a prerequisite for development.			



Land Supplies

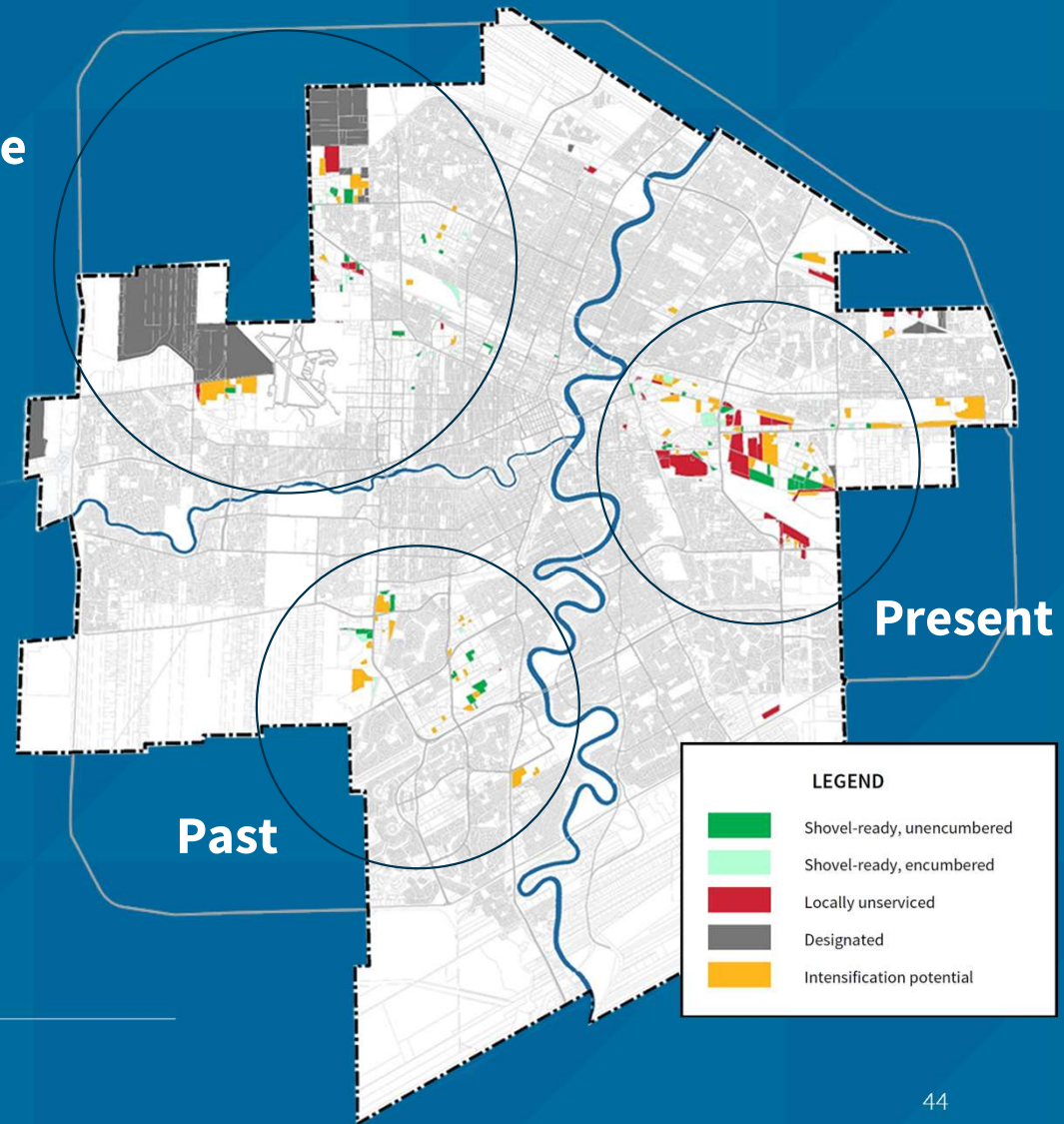
Industrial land supply

Constrained supply with little change year-over-year.
Constrained supply may even be understated:

- Much of the supply may not be for sale;
- User preference sensitivity;

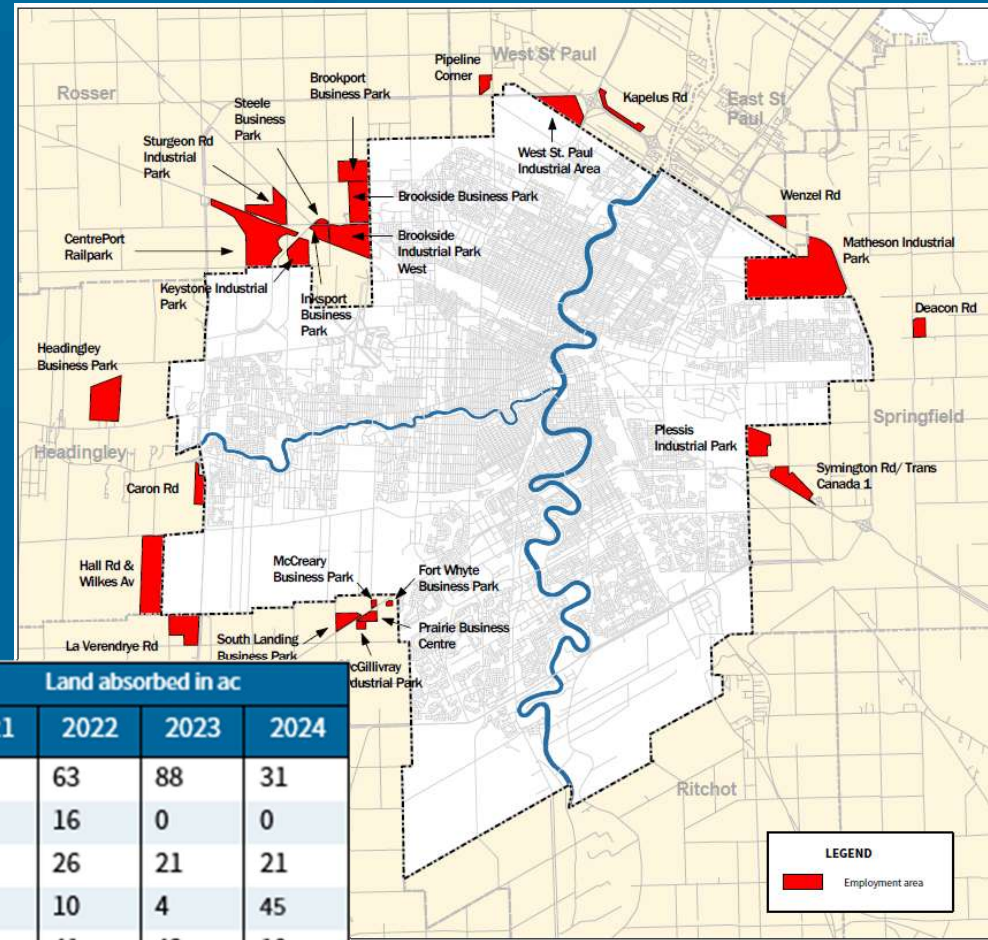
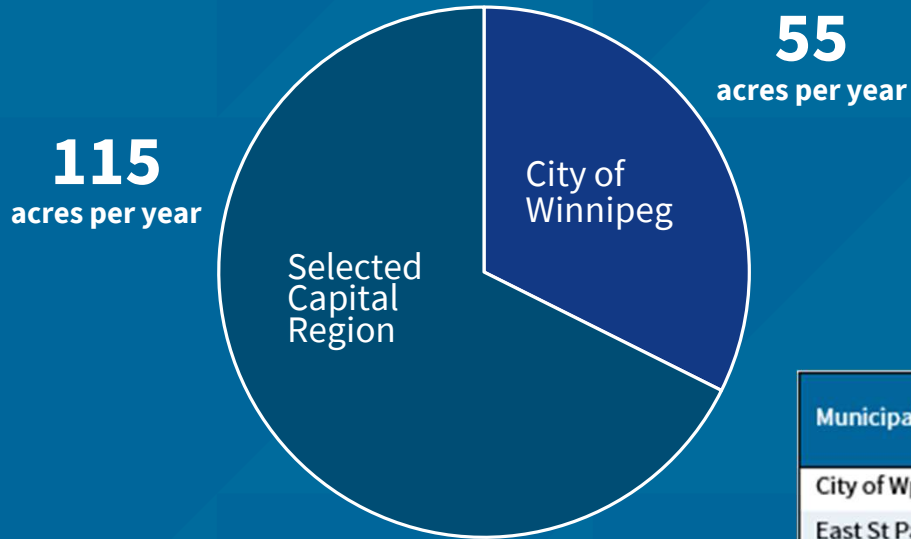
Geographic imbalance in future supply.

Future



Land Supplies

Industrial land absorption, 2021-24



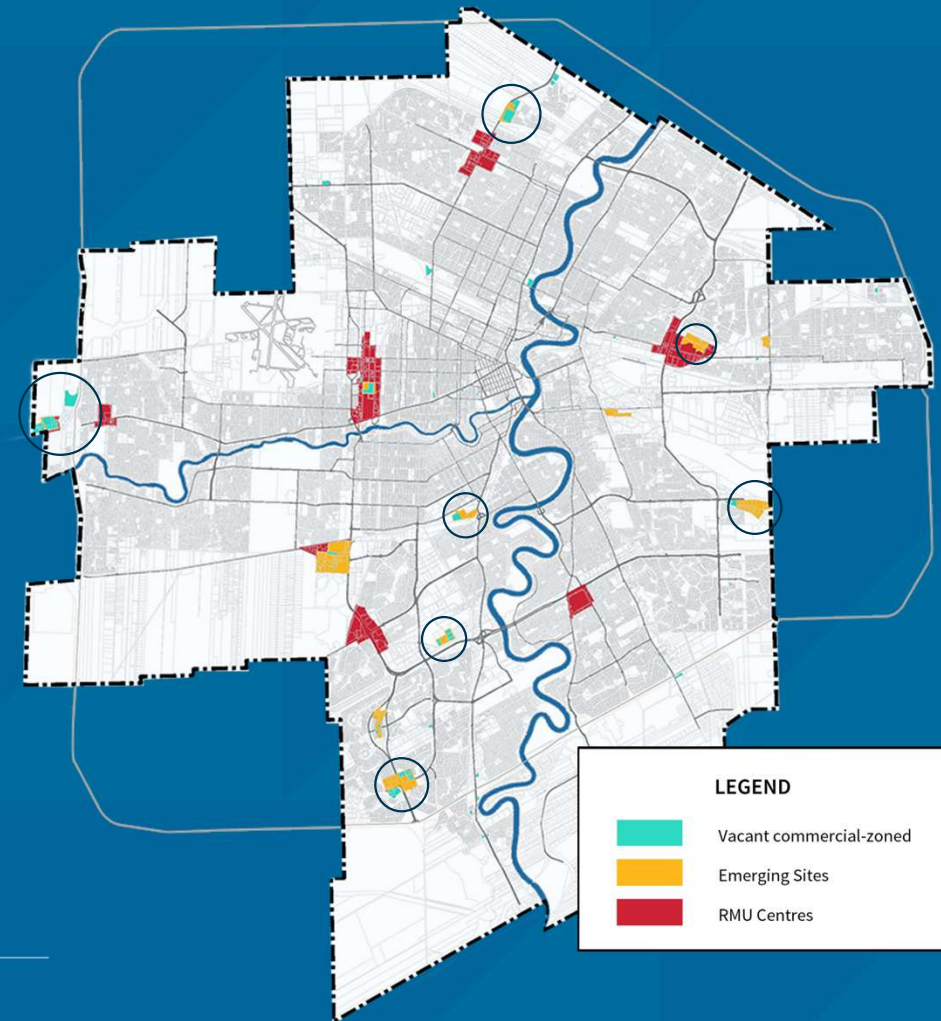
Municipality	Land absorbed in ac			
	2021	2022	2023	2024
City of Wpg	38	63	88	31
East St Paul	5	16	0	0
Headingley	30	26	21	21
Macdonald	10	10	4	45
Rosser	87	41	42	19
Springfield	27	2	16	13
West St Paul	11	0	2	11

Land Supplies

Commercial land supply

Continued persistence of an oversupply of commercial land. A 2018 study warned:

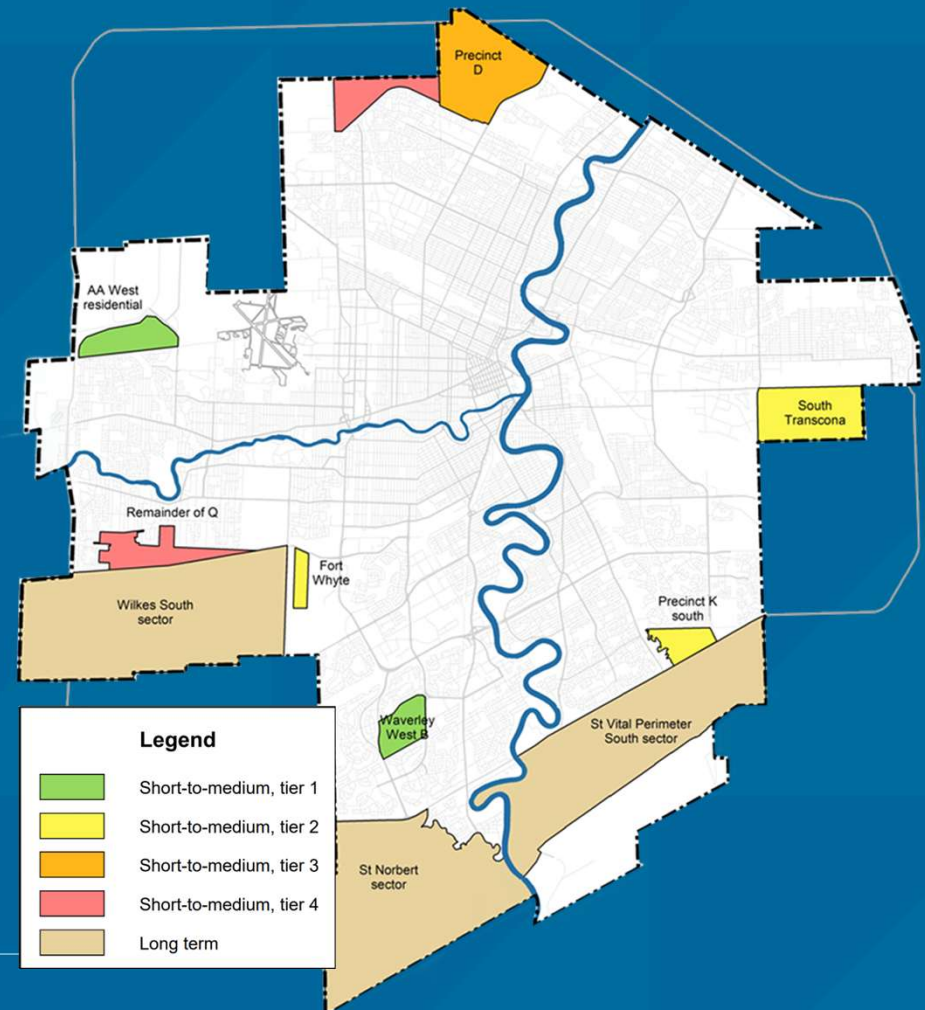
- This may limit retail intensification;
- May result in the relocation of commercial/retail uses from existing to new neighbourhoods; and
- Non-commercial development on commercial lands to be expected.



Land Monitoring

Next steps

1. Need to better understand infill infrastructure capacities
2. Need for continued growth management to inform greenfield infrastructure investments
3. OurWinnipeg review





Section 5

Evaluating the Fiscal and Economic Impacts of Growth

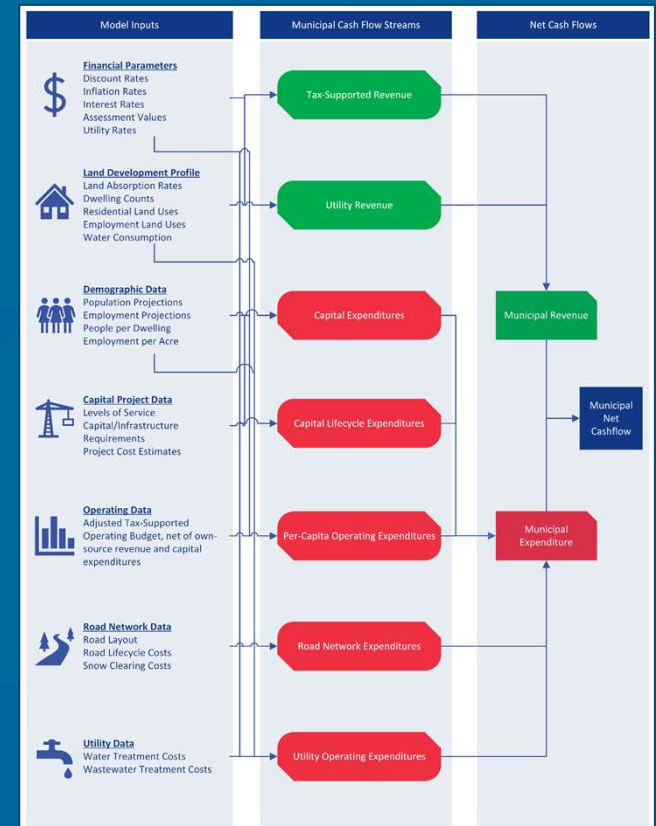
Evaluating Fiscal and Economic Impacts of Growth

As Winnipeg grows outward and upward, each development requires a unique combination of capital and operating investments to support it.

To assess the long-term financial and economic impacts of growth, the city built a land development financial impact model.

The model is used to:

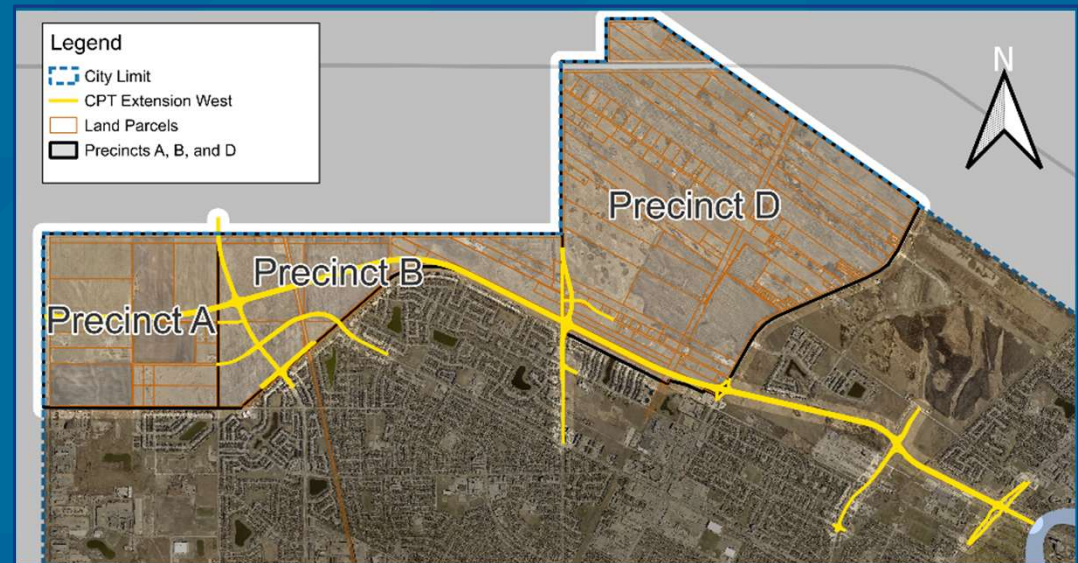
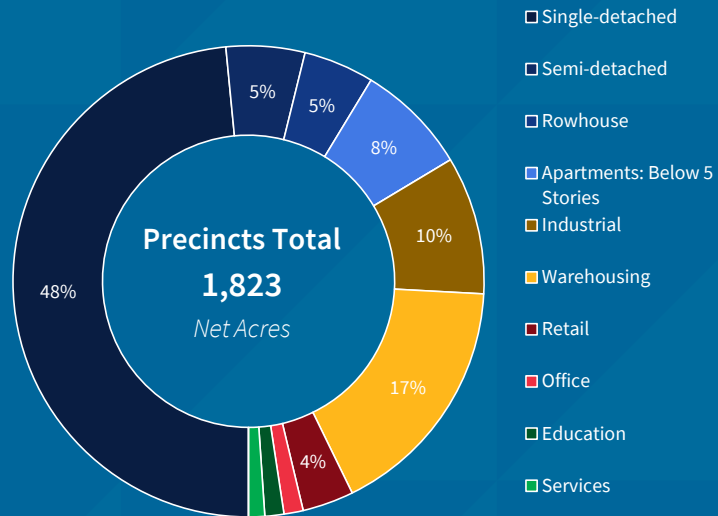
- Project development-related costs and revenues over 75-years
- Assess the financial performance under current municipal policies
- Show long-term municipal costs and benefits to elected officials and the public
- Understand the impact on the regional economy and other levels of government



Evaluating Fiscal Impacts of Growth

Example: Precincts A, B, and D

Area Land Use Distribution as of 2024



Evaluating Fiscal Impacts of Growth

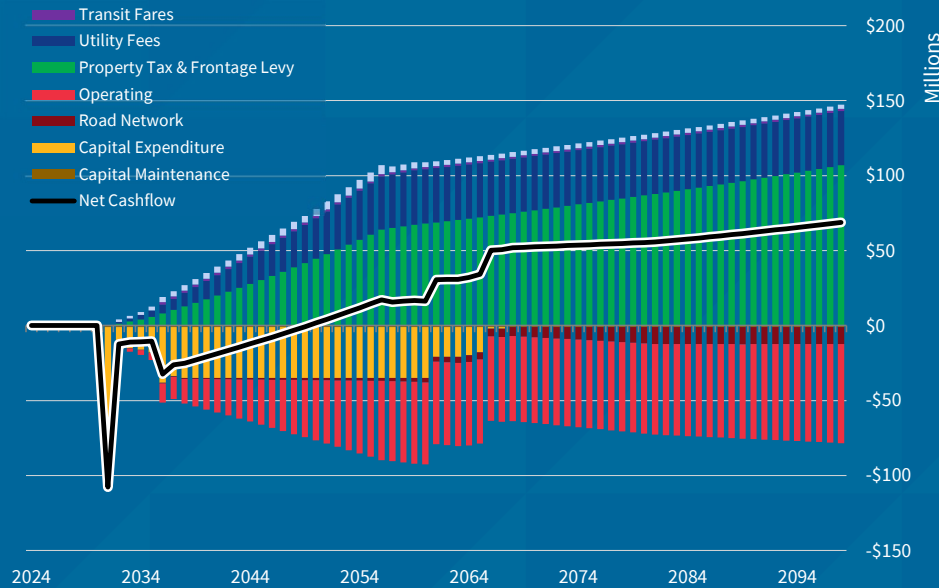
Precincts A, B, and D: Major Capital Costs (\$ millions)

Service	Project Description	Project Construction Year	Development Incurred Cost Estimate (2024 dollars, millions)	Share of Funding from Debt
Directly Related Capital Costs				
Water and Waste	Water and Wastewater Infrastructure	2031	\$95.5	100%
Public Works	Chief Peguis Trail Extension West – Main to Brookside	2031	\$173.1	50%
Community Services	Recreational Assets	2031 to 2038	\$162.8	100%
Fire Paramedic Service	Fire and EMS Station	2031 to 2034	\$15.5	100%
Parks	Park Amenities	2036	\$8.5	50%
Transit	Transit Infrastructure	2036	\$96.0	100%
Development Total (2024 dollars):			\$551.4	69%

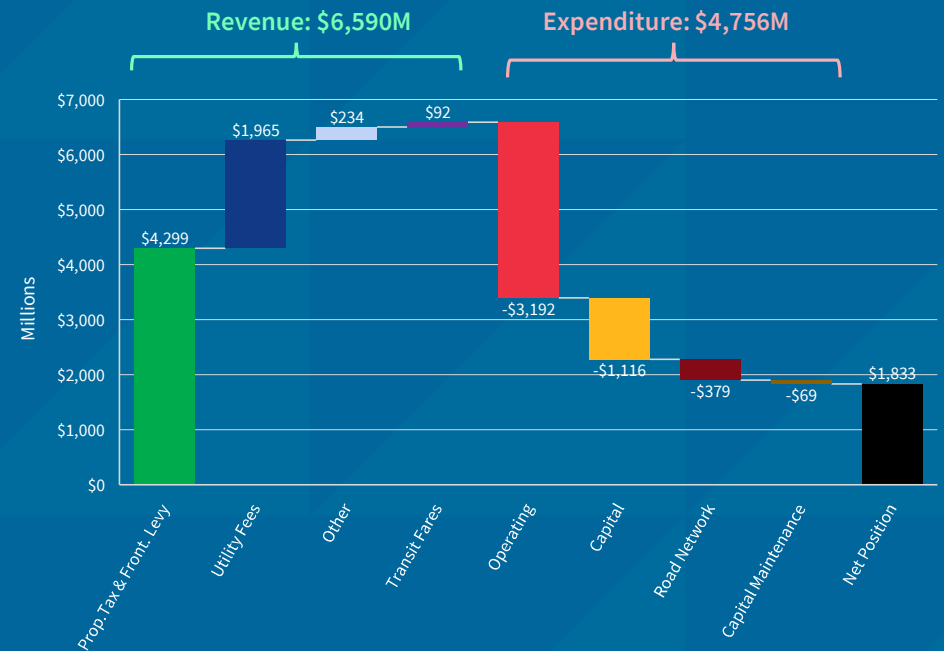
Evaluating Fiscal Impacts of Growth

Precincts A, B, and D: Cashflow Projections

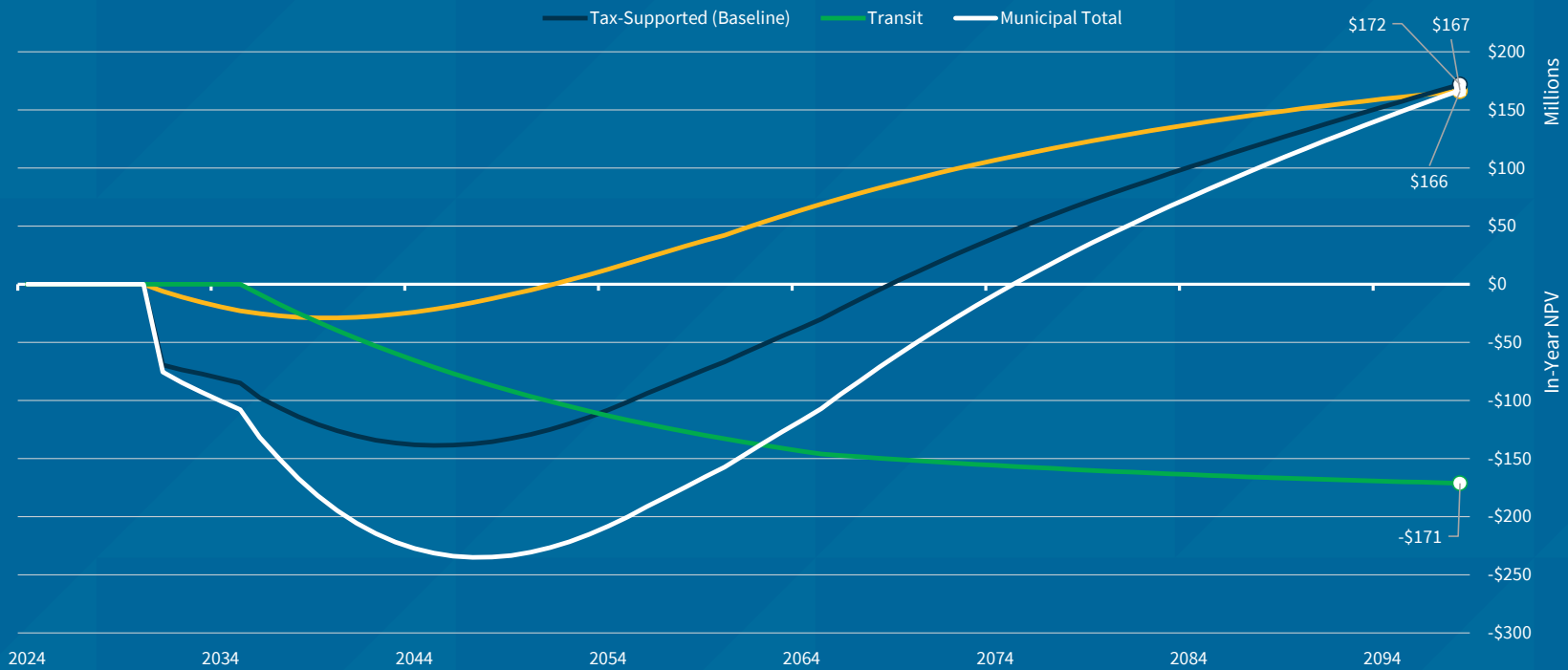
Consolidated Cashflow Projection (2024 dollars)



75-Year Consolidated Position (2024 dollars)



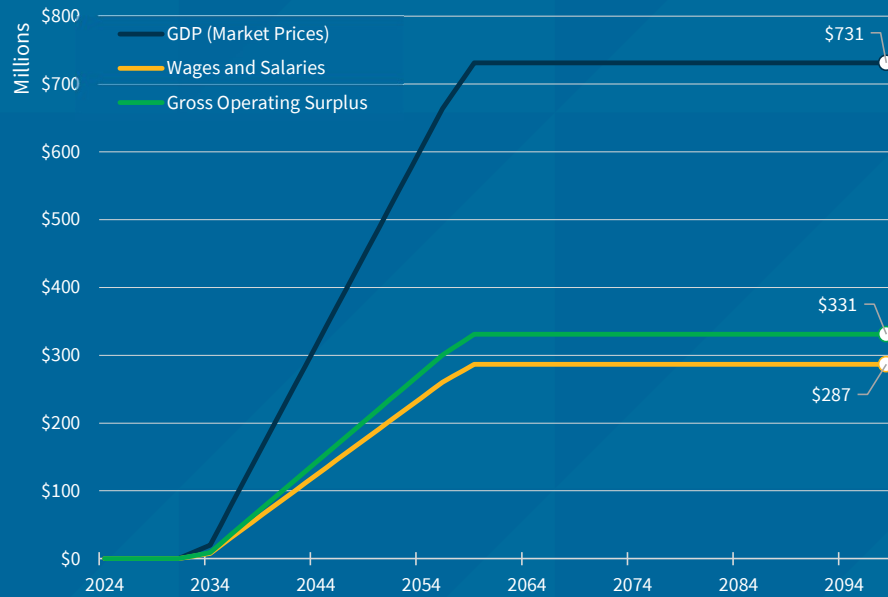
Evaluating Fiscal and Economic Impacts of Growth Precincts A, B, and D: Net Present Value (NPV)



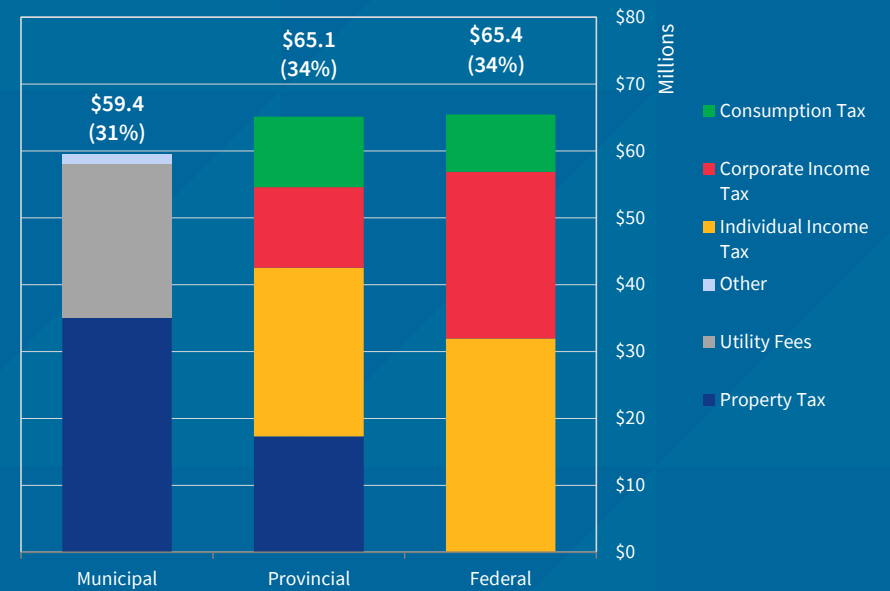
Evaluating Economic Impacts of Growth

Precincts A, B, and D: Economic Impacts

Long-Term Economic Impacts (2019 dollars)



Government Revenue (2019 dollars)





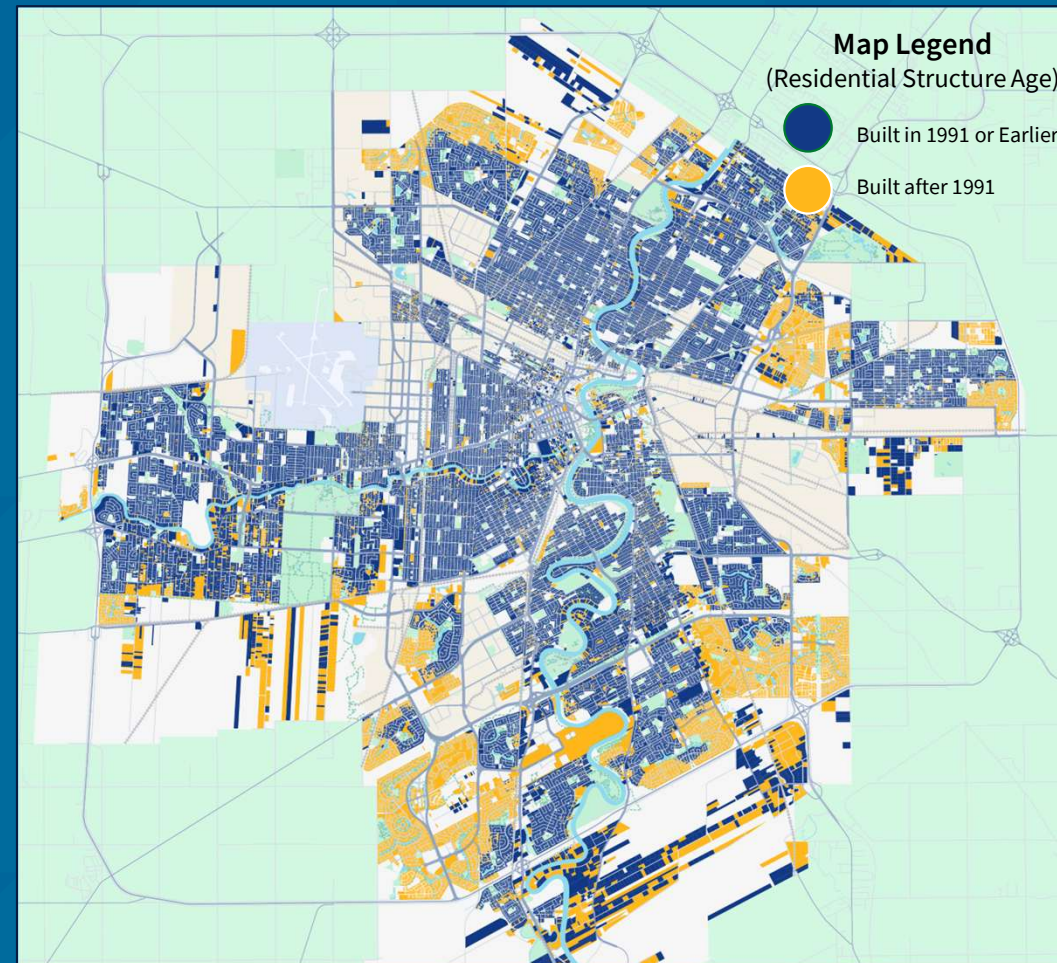
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Population by Parcels

Estimates

Residential Structure Age	Residential Parcel Land Area (km ²)	1991		2025	
		Population	Density*	Population	Density*
Built in 1991 or Earlier	100.5	628,480	6,251	603,963	6,007
Built after 1991	36.3	-	-	246,297	6,794
Total	136.8	628,480	6,251	850,260	6,215

* Density represents estimated population per km²



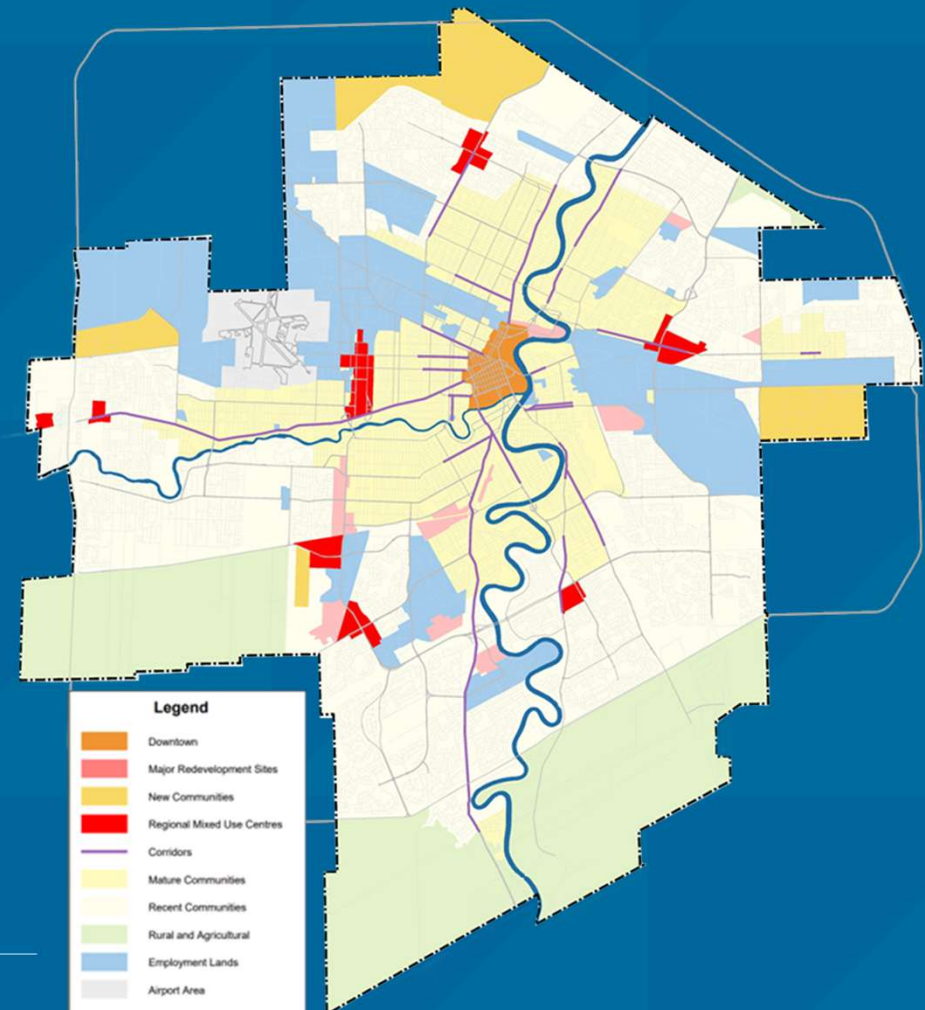
Source: Statistics Canada 1991 Census of Population; Statistics Canada 2025 Population Estimates; City of Winnipeg Economic Development & Policy calculations; City of Winnipeg 2026 Assessment Parcels dataset

Development Trends

By Urban Structure

% of new dwellings by Urban Structure, 2021-25

	2021	2022	2023	2024	2025	Avg.
Greenfield designations	40.3	47.7	46.8	47.5	38.3	44.1
Emerging Communities	40.3	47.7	46.8	47.5	38.3	44.1
New Communities	0	0	0	0	0	0
Infill designations¹	59.6	52.2	53.2	52.5	61.6	55.8
Downtown	5.4	3.4	6.5	5.6	16.5	7.5
Major Redevelopment Sites	12.3	9.5	8.1	5.4	5.5	8.1
Corridor frontage	10.8	9.7	3.9	11.0	11.2	9.3
Urban Corridors	4.5	3.4	3.9	6.1	3.3	4.2
Regional Corridors	6.3	6.3	0.0	4.9	7.9	5.1
Established Neighbourhoods	31.2	29.6	34.8	30.6	28.4	30.9
Mature Communities	12.6	15.3	14.7	12.2	13.5	13.7
Recent Communities	18.6	14.3	20.1	18.4	14.9	17.2
Rural Agricultural	0.1	0.1	0.1	0.0	0.1	0.1



Land Supplies

Greenfield residential

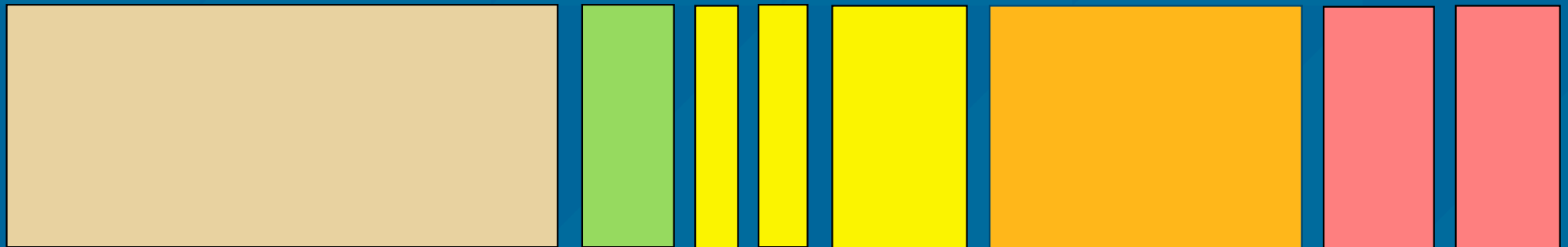
Existing planned and serviced

Tier 1

Tier 2

Tier 3

Tier 4



9 yrs

AA West
1.5 yrs

Ft Whyte
0.7 yrs

Pr K So.
0.8 yrs

So. Transcona
2.2 yrs

Precinct D
5.1 yrs

Precinct B
1.8 yrs

Precinct Q
1.7 yrs

Evaluating Fiscal Impacts of Growth

Precincts A, B, and D: Return on Investment (ROI)

