



Nichols
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Foothills County Technical Growth Study

Submitted to:

Foothills County

Submitted by:

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In Collaboration with ISL Engineering and Land Services Ltd.

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1. Introduction

Foothills County (the County) is in the early stages of updating its Municipal Development Plan (MDP), including the incorporation of its Council's recent Strategic Plan and forthcoming economic development strategy. To this end, the County has retained Nichols Applied Management (Nichols) and ISL Engineering and Land Services (ISL) to undertake a technical growth study (TGS) that will support the MDP update. The purpose of the TGS is two-fold – to examine the current state of development across the County (serving as a baseline) and to predict how much and what type of growth the County is likely to see within the next 20 years (the likely horizon of the forthcoming updated MDP).

Overall, the goals of the TGS are to:

- Provide technical background information that will assist the County with developing goals, objectives, and policies for an amended MDP to address growth needs in the County over the next 20 years;
- Create a baseline understanding of current population, housing, and employment in the County, both in terms of numbers and geographic distribution relative to the MDP's Growth Management Districts (GMDs);
- Develop population, housing, and employment projections for the period of 2025-2045;
- Understand current residential land supply (undeveloped residential land) and future requirements for residential land supply to accommodate anticipated population growth; and
- Understand if additional lands are necessary to support continued growth in non-residential land uses.

This report is intended to provide an overview of our methods and key findings of the TGS. The balance of this report is outlined as follows:

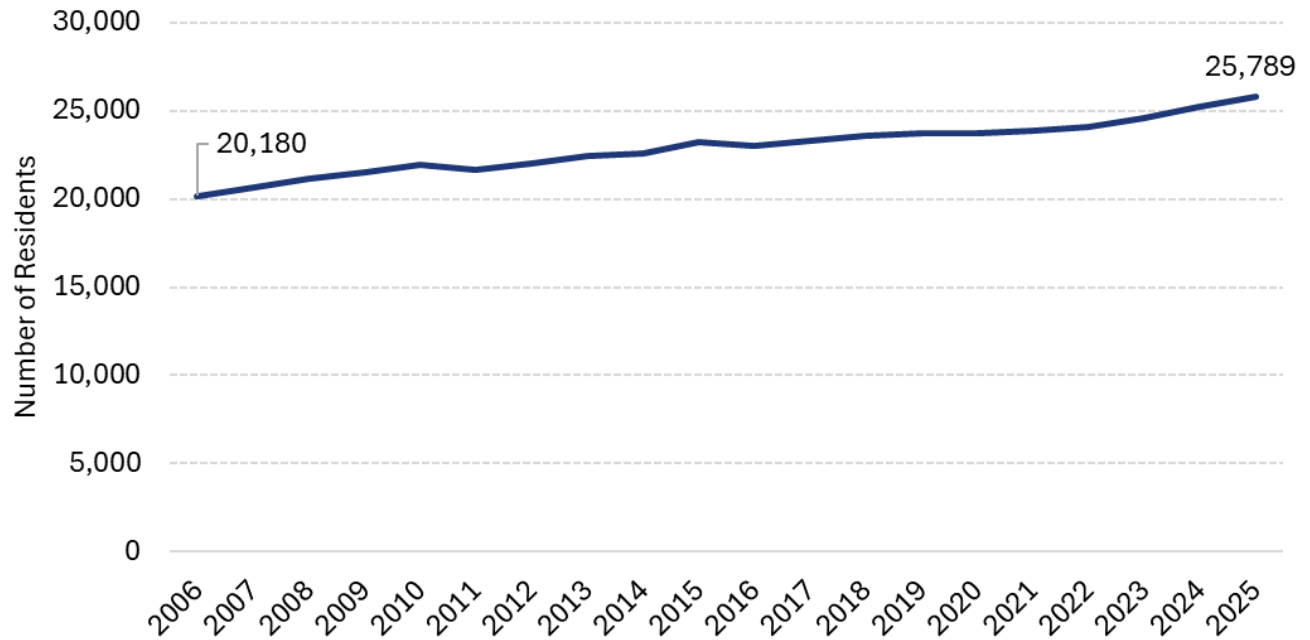
- **Section 2:** Discussion of historical growth in the County and baseline estimates of population, employment, housing, and land.
- **Section 3:** Land supply analysis for the County overall and each growth management district.
- **Section 4:** Growth methodology.
- **Section 5:** Growth projections for population, employment, housing, and land.
- **Appendix A:** Land supply mapbook.
- **Appendix B:** Additional land supply tables.

2. Historical Growth

2.1 Population and Employment

Between 2006 and 2025, Foothills County’s population has grown from an estimated 20,180 to 25,789 (Statistics Canada 2025a; Figure 2-1).

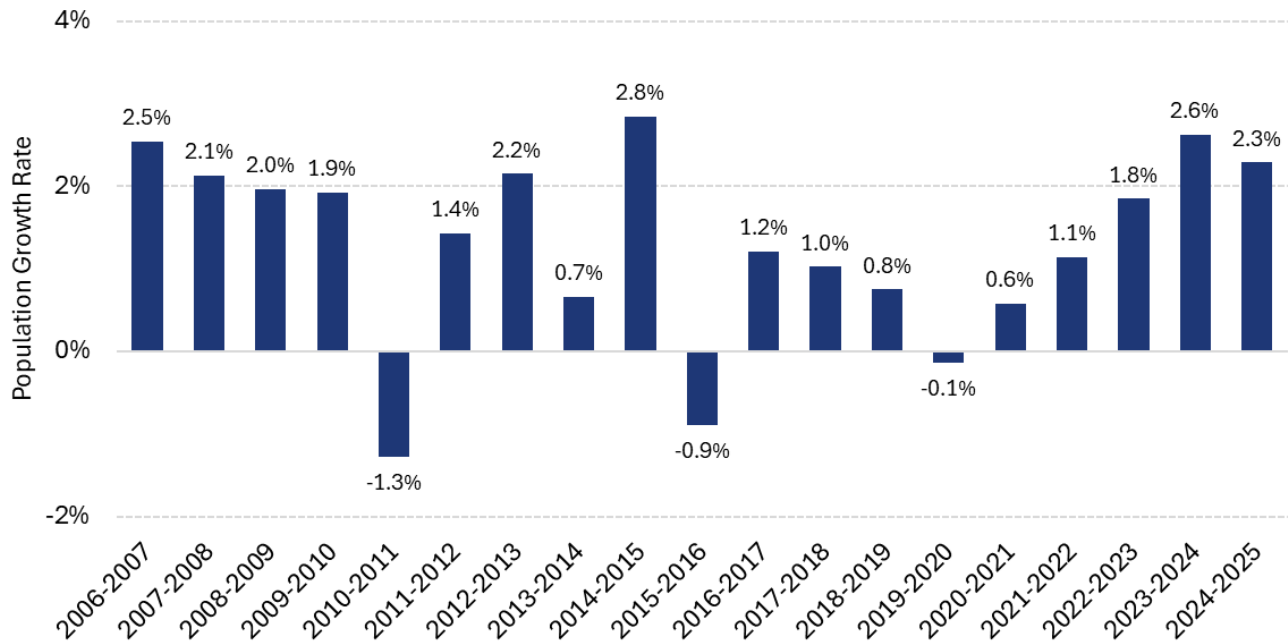
Figure 2-1 Historical Population, Foothills County, 2006 – 2025



Source: Statistics Canada (2025a).

The annual rate of growth that the County has experienced over the last two decades has fluctuated, but in general has ranged between 0.5% – 2.5% (Figure 2-2).

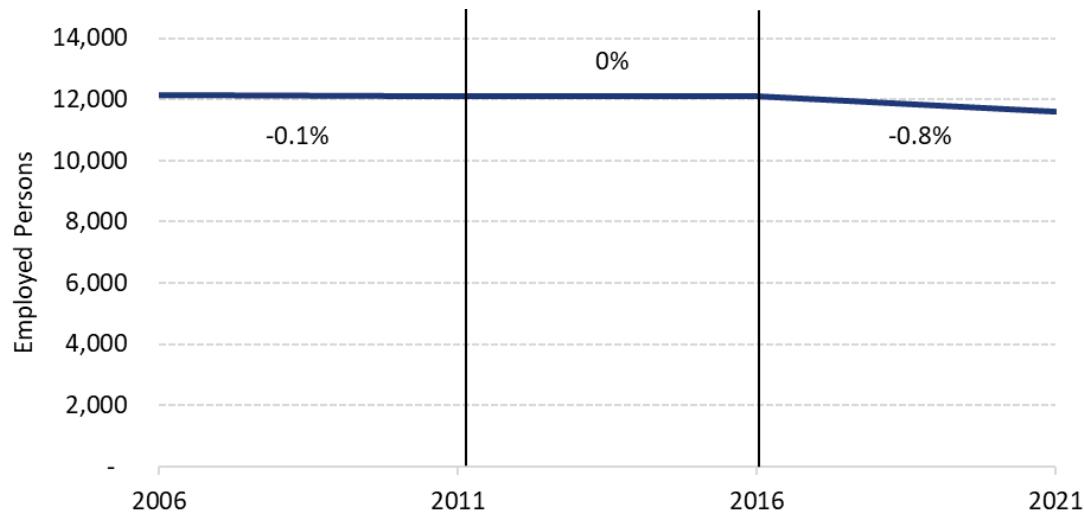
Figure 2-2 Historical Population Growth Rate, Foothills County, 2006 – 2025



Source: Statistics Canada (2025a).

While the County has experienced slight population growth over the last 20 years, employment in the County (i.e., the number of employed residents) has remained relatively unchanged (Figure 2-3). Over the entire 2006 to 2021 period, annual employment growth in the County has been about -0.3%, much lower than that of the Calgary CMA, which has seen employment growth of about 1.5% per year over the same period.

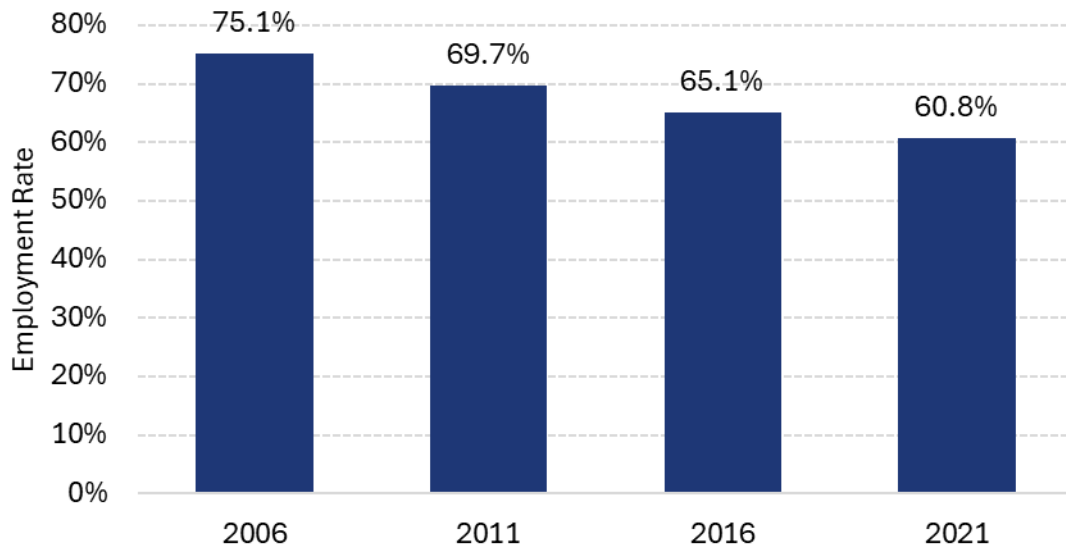
Figure 2-3 Historical Employment and Growth Rates, Foothills County, 2006 – 2021



Source: Statistics Canada (2006, 2011, and 2021).

Given the slight growth in the County’s population, but relatively unchanged growth in employed residents, the County’s overall employment rate (i.e., the proportion of people aged 15 years and older who are employed) has declined (Figure 2-4).

Figure 2-4 Historical Employment Rates, Foothills County, 2006 – 2021

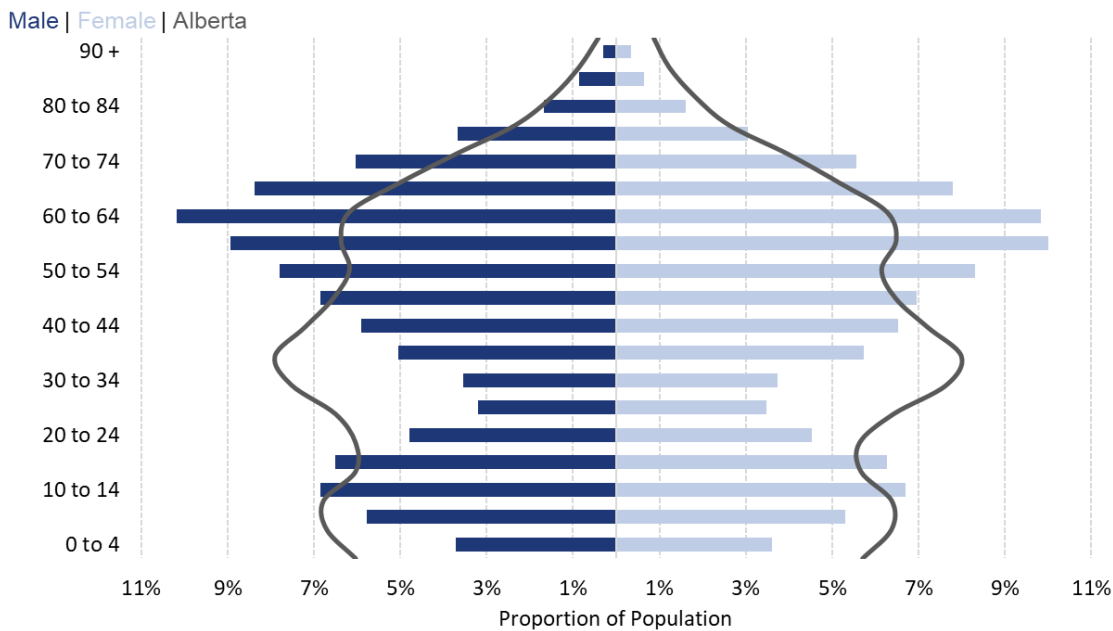


Source: Statistics Canada (2006, 2011, and 2021).

Notes: Employment rate is the proportion of people living in the County aged 15 years and older who are employed.

Additionally, given the lack of growth in employed residents, as well as the age-cohort distribution in the County, it would seem that the community has attracted a large proportion of residents that are of retirement age over the last two decades. Indeed, the age-cohort distribution suggests that the County hosts a large proportion of people over the age of 50 as compared to the provincial average (Figure 2-5).

Figure 2-5 Foothills County Population Age Distribution, 2021



Source: Statistics Canada (2021).

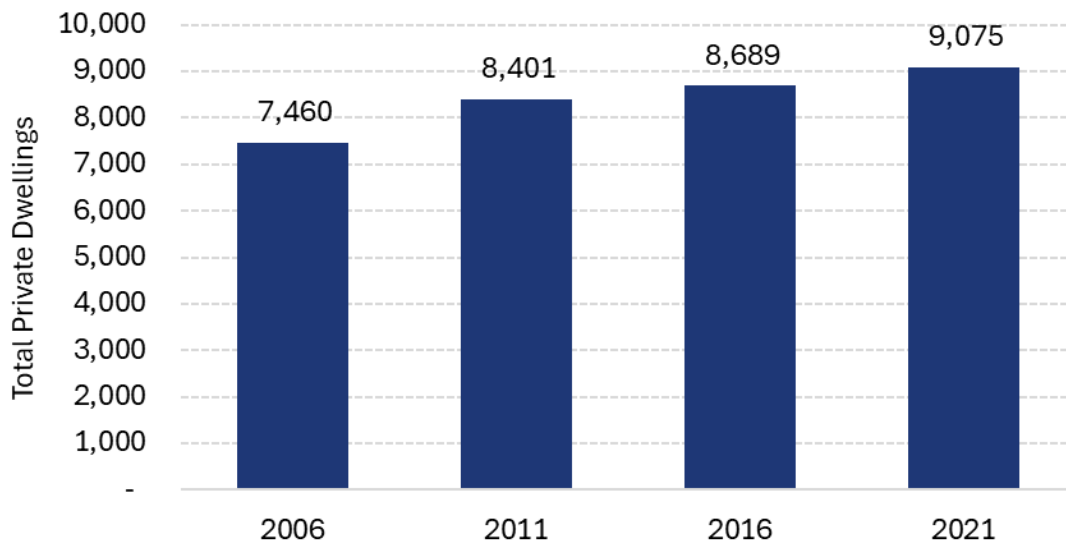
When considered in isolation, the natural population growth in the County (births less deaths) is not sufficiently high so as to maintain current population levels. As is the case in most communities across Canada, birth rates have fallen to levels below the replacement rate – a trend that has been attributed to several factors. This trend has left most Canadian communities in a position where in-migration is often driven by economic growth (job creation) within the community or nearby communities that can be easily accessed by commuting or, alternatively, by retirees looking to settle down.

2.2 Housing

According to Statistics Canada census data, the County hosted just over 9,000 private dwellings as of 2021 (Figure 2-6). Growth in dwellings has grown slightly in the County over the 2006 – 2021 period at an annual rate of 1.3%, consistent with population growth over the same period. The vast majority of occupied dwellings in the County are owned as opposed to rented (89% – 90% between 2006 and 2021).¹

¹ Statistics Canada defines household ownership as follows: “A household is considered to own their dwelling if some member of the household owns the dwelling even if it is not fully paid for, for example if there is a mortgage or some other claim on it. A household is considered to rent their dwelling if no member of the household owns the dwelling.” (Statistics Canada 2021).

Figure 2-6 Total Private Dwellings, Foothills County, 2006 – 2021



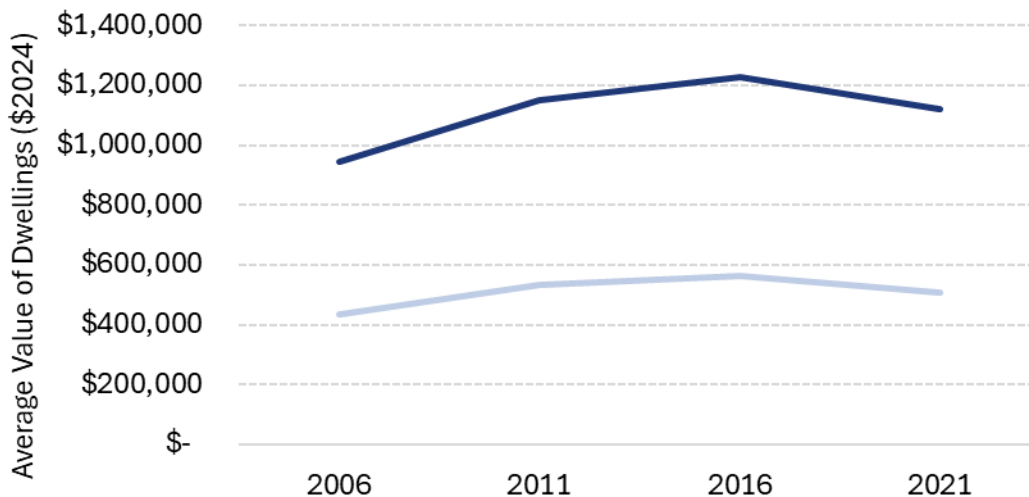
Source: Statistics Canada (2006, 2011, and 2021).

Notes: A secondary unit/suite is considered a separate private dwelling if they it has a private entrance that cannot be accessed through another living quarters (e.g., separate entrance from outside or from a common lobby).

Housing in the County is relatively expensive, highlighting the affluence of the community. Between 2006 and 2016, the average value of dwellings in the County increased from roughly \$943,000 to over \$1.2 million, before declining slightly to just over \$1.1 million in 2021 (Figure 2-7).² The average value of dwellings at the provincial level in 2021 was just over \$500,000 in comparison.

Figure 2-7 Average Value of Dwellings, Foothills County and Alberta, 2006 – 2021 (\$2024)

Foothills County | Alberta



Source: Statistics Canada (2006, 2011, and 2021).

² All dollar values are real, \$2024 CAD unless otherwise noted.

The County’s housing supply ranks relatively well in terms of suitability, adequacy, and affordability, with rates comparable or better than the province overall (Table 2-1).

Table 2-1 Housing Indicators, Foothills County and Alberta, 2021

Housing Indicator	Foothills County	Alberta
	Proportion of Dwellings (%)	
Suitable – Dwelling has sufficient bedrooms for the size and composition of the household	98%	95%
Adequate – No major repairs needed	95%	95%
Affordable – Spending less than 30% of income on shelter costs	80%	79%

Source: Statistics Canada (2021).

Notes:

-Suitability: Housing suitability is determined by assessing the required number of bedrooms for a household based on the age, sex, and relationships among household members.

-Adequacy: Housing adequacy refers to whether or not the house requires repairs beyond regular maintenance or minor repairs.

-Affordability: Housing affordability refers to whether or not owner and tenant households are spending less than 30% of their income on shelter costs (i.e., mortgage or rent).

2.3 Relevant Comparators

Table 2-2 below describes annual population growth between 2015 and 2025 for the County and seven relevant comparator municipalities in the area, including Airdrie, Calgary, Chestermere, Cochrane, High River, Okotoks, and Rocky View County. Prior to the COVID-19 pandemic (i.e., 2015-2020), many municipalities in the area experienced annual population growth rates of roughly 0-2%, with notable outliers including Airdrie, Chestermere, and Cochrane experiencing annual growth upwards of 5-9%.

After 2020, Airdrie and Cochrane have continued to see high population growth (about 3-5% per year) while Chestermere has experienced extremely high growth, reaching over 10% between 2023 and 2024. In recent years following the COVID-19 pandemic, growth in Foothills County has hovered around 1-2.5% per year, with a compound annual growth rate (CAGR)³ of 2% between 2021-2025, slightly lower than communities like Airdrie, Calgary, Cochrane, and Rocky View County, but higher than both Okotoks and High River (Figure 2-8).

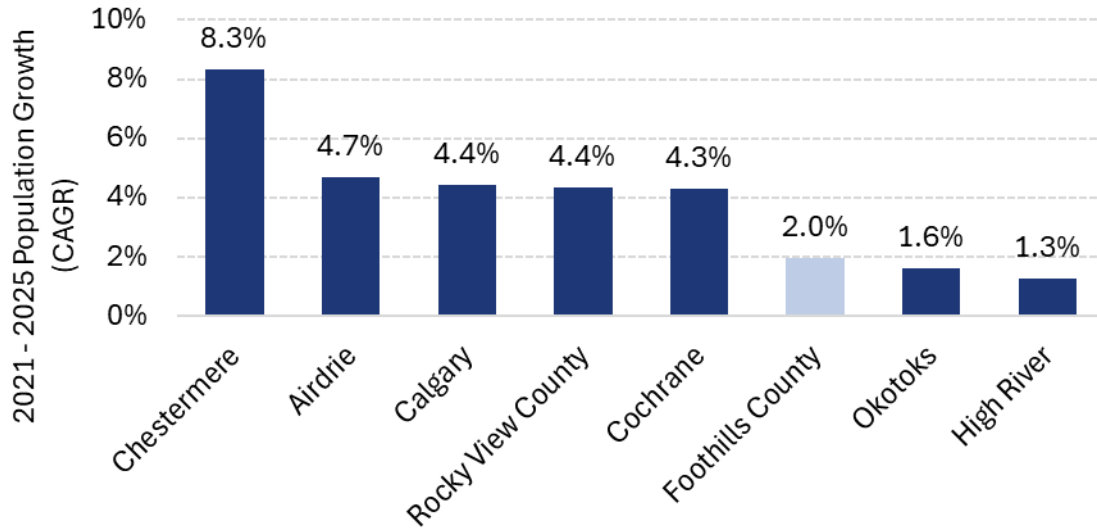
³ The CAGR described the annual growth rate between two periods assuming constant, compounding growth from period to period.

Table 2-2 Historical Population Growth Rate, Comparator Municipalities, 2015 – 2025

Year	Foothills County	Airdrie	Calgary	Chestermere	Cochrane	High River	Okotoks	Rocky View County
2015-2016	-0.9%	5.5%	1.2%	6.1%	8.5%	0.0%	1.4%	1.8%
2016-2017	1.2%	5.0%	0.9%	2.9%	5.1%	0.7%	0.9%	1.1%
2017-2018	1.0%	4.0%	1.3%	1.4%	5.2%	0.9%	0.5%	1.0%
2018-2019	0.8%	3.7%	1.8%	2.0%	4.4%	-0.5%	0.5%	1.0%
2019-2020	-0.1%	2.9%	1.6%	1.8%	3.5%	0.4%	1.4%	0.6%
2020-2021	0.6%	3.4%	0.4%	3.0%	3.8%	4.4%	1.8%	1.2%
2021-2022	1.1%	4.0%	2.9%	5.8%	4.3%	1.8%	1.7%	3.2%
2022-2023	1.8%	4.6%	6.0%	7.9%	4.6%	1.9%	1.9%	3.1%
2023-2024	2.6%	5.8%	6.3%	10.3%	4.9%	1.4%	2.0%	3.6%
2024-2025	2.3%	4.3%	2.5%	9.2%	3.4%	0.1%	0.9%	7.6%
2021-2025 CAGR	2.0%	4.7%	4.4%	8.3%	4.3%	1.3%	1.6%	4.4%

Source: Statistics Canada (2025a).

Figure 2-8 Historical Population Growth Rate, Comparator Municipalities, 2021 – 2025 Compound Annual Growth Rate (CAGR)



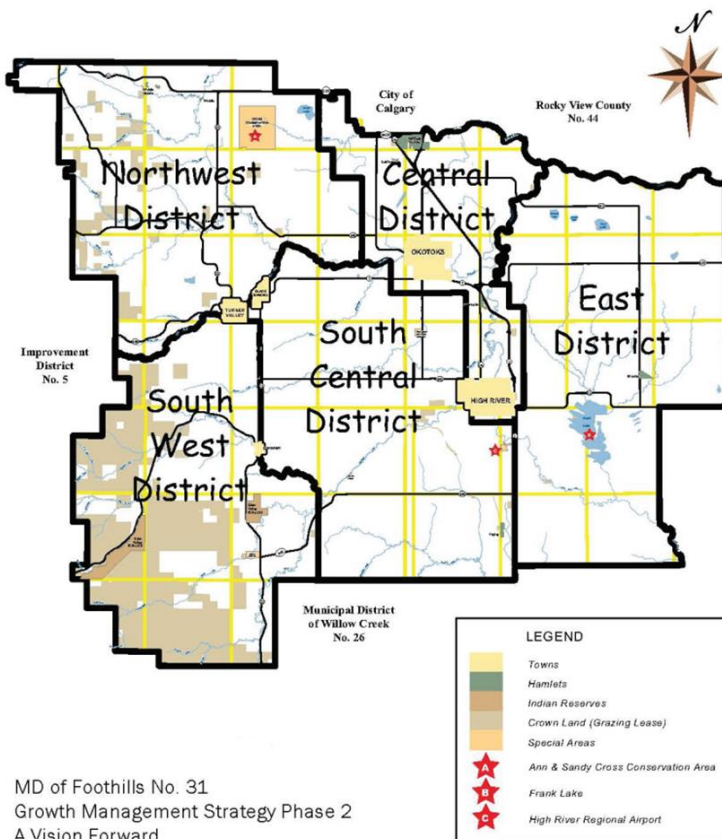
Source: Statistics Canada (2025a).

3. Land Supply Analysis

An analysis of land supply enables an understanding of the remaining land within a municipality available for residential, commercial, and industrial development. Once combined with future growth projections, the results of a land supply analysis can either confirm that sufficient land is available to accommodate future population and employment growth or determine when the supply may be exhausted.

Since this analysis depends on an understanding of current and planned land uses, this section first outlines relevant land use plans in effect, followed by an overview of the methodology and results of the land supply analysis – both County-wide and by its five MDP growth management districts (GMDs), which are illustrated in Figure 3-1. This is followed by analysis of vacant parcels as a subset of the County’s absorbed land supply.

Figure 3-1 Foothills County Municipal Development Plan Growth Management Districts



MD of Foothills No. 31
 Growth Management Strategy Phase 2
 A Vision Forward

3.1 Plans in Effect

In addition to the current MDP, the County has 72 land use plans in effect including nine intermunicipal development plans (IDPs), 54 area structure plans (ASPs), eight area concept plans (ACPs), and one outline plan (OP). Table 3-1 presents a summary of 58 of the 72 land use plans in effect that were subject to the scope of the TGS. By GMD, it presents each plan’s type, approval date, gross area in acres, core land use designations, subdivision status, and development status. The approval dates and gross areas were determined using the County’s GIS data. Core land use designations were determined by reviewing each applicable plan. Subdivision statuses were determined by comparing each plan’s future land use concept to the County’s parcel data in GIS to

check if the former had been fully implemented through the subdivision registration process. Development statuses were determined by linking the County's parcel data in GIS to municipal assessment data to check if any subdivided parcels remained vacant.

As shown in Table 3-1, 39 of the 58 land use plans in effect that were subject to this review are within the MDP's Central GMD. This is followed by 13 in the Northwest GMD, five in the South Central GMD, and one in the East GMD. There are no plans in effect within the MDP's Southwest GMD.

Also, according to Table 3-1, 40 of the 58 land use plans in effect are fully subdivided. Within these 40 plans, exactly half have subdivisions that are partially developed, which means the subdivisions have one or more vacant lots within them. The balance of the 40 plans have subdivisions in which all lots within are developed. Given that 20 plans are fully subdivided and fully developed, a case can be made that these plans are hereby fully implemented and could be repealed.

Of the remaining 18 land use plans in effect, 11 of them are partially subdivided and therefore only partially developed to date. This means these plans are only partially implemented to date, are needed to continue to guide future subdivision and development applications and will therefore contribute to the County's unabsorbed land supply. Meanwhile, seven of the plans are wholly unsubdivided and therefore wholly undeveloped to date, including:

- Heritage Crossing,
- Heritage Estates,
- High River Highway Commercial Centre,
- Highfield and Rowland Acres,
- Sanctuary on the Bow,
- The Springs at DeWinton, and
- Walking A Ranches.

These plans, which are all within the Central GMD, will be the biggest contributors to the County's unabsorbed land supply. Notwithstanding, one of these plans is the Sanctuary on the Bow ASP, which is anticipated to never be developed as the subject lands are within the flood plain of the Bow River. This ASP is therefore another candidate for being repealed. Additionally, the Sirocco ASP has been identified in the Urban Growth Corridor of The City of Calgary and may be subject to future annexation.

Table 3-1 Summary of Selected Land Use Plans in Effect

Plan Name	Plan Type	Approval Date	Area (ac)	Core Land Use Designations	Subdivision Status	Development Status
Central Growth Management District						
Aldersyde Junction	ACP	12/19/2012	151.5	Industrial, Commercial	Partially subdivided	Partially developed
Bar None Ranches	ASP	6/28/2017	122.8	Country Residential, Agriculture	Fully subdivided	Fully Developed
Cara Ranch Estates	ASP	9/15/2005	68.7	Country Residential, Agricultural	Fully subdivided	Fully Developed
Chinook Valley	ASP	9/11/2003	884.5	Country Residential, Agricultural, Commercial Rural	Fully subdivided	Partially developed
Coulee View Estates	ASP	1/4/2001	109.4	Country Residential, Agricultural	Fully subdivided	Partially developed
Deer Creek Estates	ASP	8/30/2007	244.2	Agricultural, Country Residential	Fully subdivided	Partially developed
Eden Park Estates	ASP	8/31/2000	109.5	Country Residential, Single Detached Dwellings	Fully subdivided	Partially developed
Foothills Crossing	ASP	11/30/2022	783.3	Commercial, Highway Commercial, Commercial / Industrial, Business Park, Open Space	Partially subdivided	Partially developed
Foxboro Country Estates	ASP	6/18/2001	85.3	Country Residential	Fully subdivided	Partially developed
Green Haven Estates	ASP	1/18/2007	127.2	Residential, Single Family, Residential - Duplex, Residential Triplex	Fully subdivided	Partially developed
Heritage Crossing	ASP	3/5/2025	39.1	Residential Community, Residential Multi-Family, Municipal Land Reserve, Recreation	Unsubdivided	Undeveloped
Heritage Estates	ASP	25/8/2025	15.1	Residential Community – Single Family, Residential Community – Single / Semi-detached, Residential Community - Townhouses	Unsubdivided	Undeveloped
Heritage Pointe	ASP	3/2/2000	885.9	Residential Land Use, Commercial Lands	Fully subdivided	Fully Developed

Plan Name	Plan Type	Approval Date	Area (ac)	Core Land Use Designations	Subdivision Status	Development Status
Heritage Pointe (Serenity Addendum)	ASP	9/8/2021	24.4	Hamlet Residential, Residential Multi-Family Villas	Fully subdivided	Fully Developed
Heritage Pointe Stage III	ASP	9/13/2007	137.6	Estate Single Family, Executive Single Family, Villa Units	Fully subdivided	Fully Developed
High River Highway Commercial Centre	ACP	06/30/2005	98.2	Highway Commercial, Retail Outlet Mall, Farmers Market, Recreational Vehicle Park	Unsubdivided	Undeveloped
Highfield and Rowland Acres	ASP	4/9/2025	1,151.3	Cluster Residential District, Residential Community District, Residential Multi-Family District Flexible, Residential Multi-Family District, Regional Municipal Reserve, Neighbourhood Commercial District, Recreation District Equestrian	Unsubdivided	Undeveloped
Highway 2A Industrial	ASP	10/07/2010	9,203.8	Agricultural Transition, Historic Country Residential, Industrial Commercial, Industrial Edge, Industrial General	Partially subdivided	Partially developed
Kayla Vista Estates	ASP	10/7/2004	79.5	Country Residential	Fully subdivided	Partially developed
Norris Coulee Estates	ASP	6/22/2000	205.2	Country Residential	Fully subdivided	Fully Developed
Paradise Ranch	ACP	3/7/2002	132.4	RV Park, Equestrian Facility, Country Manor, Single Family Residence, Short Stay RV Camp Site	Partially subdivided	Partially developed
Pine Creek Ranch	ASP	6/7/2001	43.4	Residential	Fully subdivided	Fully Developed
Ravencrest	ASP	7/17/2008	207.6	Country Residential	Fully subdivided	Fully Developed
Ridge View Estates	ASP	3/29/2007	70.1	Country Residential	Fully subdivided	Fully Developed
Rocky Mountain Show Jumping	ASP	5/22/2013	240.7	Equestrian Venue	Fully subdivided	Partially developed
Rowland	ASP	8/25/2011	59.9	Country Residential, Agriculture	Fully subdivided	Fully Developed
Sanctuary on the Bow	ASP	11/23/2006	282.6	Single Family Residential Area	Unsubdivided	Undeveloped

Plan Name	Plan Type	Approval Date	Area (ac)	Core Land Use Designations	Subdivision Status	Development Status
Section 5	ACP	6/26/1905	617.4	Country Residential	Fully subdivided	Partially developed
Shannon Estates	ASP	7/12/2001	158.1	Residential, Rural Commercial	Fully subdivided	Partially developed
Silvertip Ranch	ASP	6/10/2007	243.8	Country Residential, Commercial	Fully subdivided	Fully Developed
Sirocco	ASP	5/14/2009	937.6	Residential, Commercial, Recreational	Partially subdivided	Partially developed
Spruce Meadows	ASP	3/25/2020	506.4	Direct Control #1, Equestrian and Agricultural / Animal Support District, Agricultural Education District, Sports and Entertainment District, Good Friends and Good Commerce District, Parking and Operations Support District	Fully subdivided	Partially developed
Sulky Ridge	ASP	1/11/2001	154.9	Country Residential, Agricultural	Fully subdivided	Fully Developed
Sundance Trail	ASP	7/12/2001	145.4	Country Residential, Agricultural	Fully subdivided	Partially developed
Sunset Ridge	ASP	10/7/2004	67.3	Country Residential	Fully subdivided	Fully Developed
The Springs at DeWinton	OP	12/3/2014	324.4	Residential Area, Private Open Space Area, Agricultural Area, PUL	Unsubdivided	Undeveloped
Walking A Ranches	ASP	9/14/2000	283.3	Country Residential, Agriculture	Unsubdivided	Undeveloped
Wapiti Ridge Estates	ASP	1/18/2001	86.1	Country Residential, Agricultural	Fully subdivided	Fully Developed
Willowside Farms	ASP	10/12/2000	119.1	Country Residential	Fully subdivided	Fully Developed
East Growth Management District						
Hamlet of Blackie	ASP	4/20/2006	1,967.5	Agricultural, Commercial Hamlet, Commercial Highway, Country Residential, Industrial Hamlet, Residential	Partially subdivided	Partially developed
Northwest Growth Management District						
Crestview Ranch Estates	ASP	5/1/2002	95.5	Country Residential	Fully subdivided	Fully Developed
Granary Road	ACP	5/4/2016	145.1	Agricultural, Tourism	Fully subdivided	Fully Developed

Plan Name	Plan Type	Approval Date	Area (ac)	Core Land Use Designations	Subdivision Status	Development Status
Hawk's Landing at Priddis Creek	ASP	10/13/2005	304.8	Residential, Agricultural	Fully subdivided	Partially developed
Millarville Country Estates	ASP	1/13/2005	109.5	Country Residential	Fully subdivided	Fully Developed
Millarville Hamlet	ASP	4/13/1990	819.1	Hamlet commercial, Residential	Fully subdivided	Partially developed
Priddis Creek	ASP	10/5/1995	331.0	Residential	Fully subdivided	Partially developed
Priddis Meadows	ASP	11/8/2001	32.2	Country Residential, Residential	Fully subdivided	Partially developed
Ranchers Hill	ASP	3/9/2000	209.9	Country Residential, Agricultural	Fully subdivided	Partially developed
Red Willow Estates	ASP	6/12/2003	261.9	Country Residential, Agricultural	Partially subdivided	Partially developed
Rusticana Estates	ACP	10/07/2010	471.4	Country Residential	Fully subdivided	Partially developed
Square Butte Ranches	ACP	8/20/1998	468.5	Private Recreational Ranch	Partially subdivided	Partially developed
Warner ASP	ASP	9/9/1999	137.9	Country Residential	Partially subdivided	Partially developed
Whiskey Springs Ridge	ASP	4/8/2004	200.8	Country Residential	Fully subdivided	Partially developed
South Central Growth Management District						
Hamlet of Cayley	ASP	10/30/2003	533.3	Residential, Country Residential, Industrial Hamlet, Commercial Rural, Commercial Hamlet, Agricultural	Partially subdivided	Partially developed
Montecristo Ranch	ASP	3/13/2019	115.6	Residential, Agricultural, Country Residential,	Fully subdivided	Partially developed
Muir Ranch	ACP	10/30/2008	27.5	Residential, Country Residential, Industrial Hamlet, Commercial Rural, Commercial Rural, Commercial Hamlet, Agricultural	Partially subdivided	Partially developed
Shore Estates	ASP	6/28/2001	96.6	Country Residential, Agricultural	Fully subdivided	Fully Developed
Snow Estates	ASP	3/10/2005	133.0	Country Residential	Fully subdivided	Fully Developed

Source: Foothills County (IMDPPlanArea and Parcels GIS datasets, Municipal Plans webpage, and municipal assessment data by parcel)

3.2 Methodology

This land supply analysis, which excludes agricultural lands, focuses on non-agricultural developable lands within the County, classified into two overarching categories:

- **Absorbed land supply:** includes parcels that have been subdivided and zoned under a residential, commercial, industrial, or agricultural business district in the land use bylaw (LUB). This category includes both developed and undeveloped parcels, as long as they are subdivided and zoned for their intended use (i.e., shovel-ready). Some absorbed parcels are within an approved plan area, such as an ASP, an ACP, or an OP, but others have been subdivided, zoned, and potentially developed in a piece meal fashion outside of an approved plan. The absorbed land supply is measured in net developable acres and is usually unavailable to accommodate long-term future growth, except through infill development, intensification, or redevelopment. **Vacant lands**, as described in Section 3.4, are a subset of absorbed land supply.
- **Unabsorbed land supply** (or available land supply): includes parcels that are planned within the MDP, an ASP, an ACP, or an OP for residential, commercial, industrial, or agricultural business development, but have not yet been zoned, subdivided, or developed for their ultimate intended use. This category only includes undeveloped parcels, as development cannot occur prior to the land being subdivided and zoned appropriately. The unabsorbed land supply is measured in gross developable acres and is typically where most of the anticipated long-term growth will be accommodated.

For the purposes of this study, every non-agricultural parcel in the County was categorized as either absorbed or unabsorbed following the definitions above. Subsequently, parcels were further classified according to their core land use (i.e., residential, commercial, industrial, or agricultural business) in alignment with the land use districts from the County's LUB. For unabsorbed parcels that have not yet been zoned, the core land use reflects the LUB district that best aligns with the uses or types of developments that have been planned therein.

The primary goal of the land supply analysis was to understand how many acres of absorbed and unabsorbed non-agricultural (i.e., residential, commercial, industrial, and agricultural business) land there is in the County. Net developable overhead land uses (i.e., parks and open spaces, public utilities, and roads), institutional uses, and agricultural land that has not been planned for any other type of use were excluded. The analysis was conducted at a County-wide level and then broken down by GMD.

Appendix A shows the land use classification of all parcels within the County according to the methodology described above. The preliminary allocation of land use categories was drawn from registered parcel designations (e.g., ER for environmental reserve, MR for municipal reserve, PUL for public utility lot, etc.), LUB districting, and land use designations from ASPs, ACPs, and OPs, where available. Where ambiguities or peculiarities were observed, the directions from the above were audited through the review of imagery available through Google Earth, examining images through Google Street View where coverage was available, consulting with municipal staff, and using professional judgement.

3.3 Results

This section presents the findings of the County's land supply analysis, as shown in the map book presented in Appendix A and tables presented in Appendix B.

3.3.1 Foothills County Overall

Absorbed Land Supply

The County has a total of 54,261.2 acres (ac) of absorbed land. As mentioned above, this accounts only for core land uses, and is broken down as follows:

- 44,701.5 ac (82.4%) of absorbed residential lands;
- 922.2 ac (1.7%) of absorbed commercial lands;
- 8,269.5 ac (15.2%) of absorbed industrial lands; and
- 367.9 ac (0.7%) of absorbed agricultural business lands.

The breakdown of these categories by LUB district is presented in Table 3-2.

Table 3-2 Foothills County Net Developable Absorbed Land Supply

Core Land Use District	Acres	Percentage
Cluster Residential	0.0	0.0%
Residential Community	664.5	1.2%
Country Estate Residential	0.0	0.0%
Country Residential	44,031.0	81.1%
Residential Manufactured Home	0.0	0.0%
Residential Multi-Family	6.0	0.0%
Residential Subtotal	44,701.5	82.4%
Community Commercial	80.1	0.1%
Commercial Direct Control	708.0	1.3%
Highway Commercial	73.1	0.1%
Rural Business	61.0	0.1%
Commercial Subtotal	922.2	1.7%
Business Park	123.1	0.2%
Industrial Direct Control	244.5	0.5%
Industrial Edge	96.9	0.2%
General Industry	870.0	1.6%
Hamlet Industry	174.0	0.3%
Low Intensity Industry	43.9	0.1%
Natural Resource Extraction	6,717.1	12.4%
Industrial Subtotal	8,269.5	15.2%
Agricultural Business	367.9	0.7%
Agricultural Business Subtotal	367.9	0.7%
Total Net Developable Absorbed Core Land Uses	54,261.2	100.0%

As shown in Table 3-2, most absorbed residential lands are within the Country Residential District (44,031.0 ac), accounting for 81.1% of the total absorbed land supply. This is followed by the Residential Community District (664.5 ac) and the Residential Multi-Family District (6.0 ac), which make up 1.2% and less than 0.1% of the absorbed land supply, respectively. There are no absorbed lands zoned under the Cluster Residential, Country Estate Residential, or Residential Manufactured Home districts.

In terms of absorbed commercial lands, most of them are zoned under a Direct Control District (708.0 ac), representing 1.3% of the absorbed land supply. This is followed by the Community Commercial (80.1 ac), Highway Commercial (73.1 ac), and Rural Business (61.0 ac) districts, which together constitute only 0.4% of the absorbed land supply.

Regarding absorbed industrial lands, the majority are in the Natural Resource Extraction District (6,717.1 ac), making up 12.4% of the total absorbed land supply. This is followed by the General Industry (870.0 ac), Direct Control (244.5 ac), Hamlet Industry (174.0 ac), Business Park (123.1 ac), Industrial Edge (96.9 ac), and Low Intensity Industry (43.9 ac) districts, comprising 2.9% of the absorbed land supply.

All the agricultural business land included in this analysis is in the Agricultural Business District (367.9 ac), representing 0.7% of the total absorbed land supply.

In sum, the absorbed land supply in the County is predominantly made up of country residential (81.1%) and natural resource extraction (12.4%) developments.

Unabsorbed Land Supply

The County has a total of 6,545.6 ac of gross developable unabsorbed land. As mentioned above, these are parcels that typically have been planned for residential, commercial, industrial or agricultural business uses, but have not yet been zoned, subdivided, or developed. This means they are available to accommodate future growth in the long-term. Notably, parcels that, as of 2026, remain designated as agricultural and have not been planned for any other type of use are excluded from this inventory.

As mentioned in Section 3.2, the unabsorbed land supply is measured in gross developable acres, meaning that a percentage will need to be deducted to accommodate overhead land uses such as parks and open space, roads, and public utilities at the subdivision stage. These are essential to support core land uses.

The unabsorbed land supply breakdown by core land use is as follows:

- 2,668.4 ac (40.6%) of unabsorbed residential lands;
- 777.1 ac (11.8%) of unabsorbed commercial lands;
- 2,994.7 ac (45.6%) of unabsorbed industrial lands; and
- 127.3 ac (1.9%) of unabsorbed agricultural business lands.

The breakdown of these categories by LUB district is presented in Table 3-3.

Table 3-3 Foothills County Gross Developable Unabsorbed Land Supply

Core Land Use District	Acres	Percentage
Cluster Residential	640.4	9.8%
Residential Community	1,422.9	21.7%
Country Estate Residential	32.5	0.5%
Country Residential	480.5	7.3%
Residential Manufactured Home	0.0	0.0%
Residential Multi-Family	92.1	1.4%
Residential Subtotal	2,668.4	40.6%
Community Commercial	58.8	0.9%
Commercial Direct Control	120.9	1.8%
Highway Commercial	597.4	9.1%
Rural Business	0.0	0.0%
Commercial Subtotal	777.1	11.8%
Business Park	288.8	4.4%
Industrial Direct Control	601.9	9.2%
Industrial Edge	1,991.7	30.3%
General Industry	112.2	1.7%
Hamlet Industry	0.0	0.0%
Low Intensity Industry	0.0	0.0%
Natural Resource Extraction	0.0	0.0%
Industrial Subtotal	2,994.7	45.6%
Agricultural Business	127.3	1.9%
Agricultural Business Subtotal	127.3	1.9%
Total Gross Developable Unabsorbed Land Supply	6,545.6	100.0%

As shown in Table 3-3, most unabsorbed residential lands are within the Residential Community District (1,422.9 ac), accounting for 21.7% of the total unabsorbed land supply. This is followed by the Cluster Residential District (640.4 ac) and Country Residential District (480.5 ac), which make up 9.8% and 7.3% of the unabsorbed land supply, respectively. Together, the Residential Multi-Family District (92.1 ac) and Country Estate Residential District (32.5 ac) represent only 1.9% of the unabsorbed land supply. There are no unabsorbed lands in the Residential Manufactured Home District.

It is important to note that of the 1,422.9 ac of gross developable unabsorbed residential lands within the Residential Community District, 310.5 (21.8%) ac are within the Sirocco ASP, which is identified to be annexed by

The City of Calgary, and 130.2 ac (9.1%) are within the Sanctuary on the Bow ASP, which is unlikely to be developed as the subject lands are within the flood plain of the Bow River. Excluding these two ASPs, the amount of gross developable unabsorbed residential lands within the Residential Community District is 982.2 ac, of which:

- 572.9 ac (58.3%) are in the Highfield and Rowland Acres ASP.
- 292.5 ac (29.8%) are in the Hamlet of Blackie ASP.
- 77.8 ac (7.9%) are in the Hamlet of Cayley, specifically within the Hamlet of Cayley ASP and Muir Ranch ACP.
- 31.3 ac (3.2%) are in the Hamlet of Heritage Pointe, specifically within the Heritage Crossing ASP and the Heritage Estates ASP.
- 7.5 ac (0.8%) are in the Meadow Creek ASP adjacent to the Town of High River.

Meanwhile, of the 640.4 ac of gross developable unabsorbed residential lands within the Cluster Residential District, 291.8 ac (45.6%) are within The Springs at DeWinton OP, which is unlikely to be developed as currently proposed. Excluding this ASP, the amount of gross developable unabsorbed residential lands within the Cluster Residential District is 348.6 ac, all of which resides within the Highfield and Rowland Acres ASP.

In terms of unabsorbed commercial lands, most of them are in the Highway Commercial District (597.4 ac), which constitutes 9.1% of the unabsorbed land supply. This is followed by the Direct Control (120.9 ac) and Community Commercial (58.8 ac) districts, making up 1.8% and 0.9% of the unabsorbed land supply, respectively. There are no unabsorbed lands in the Rural Business District.

Regarding unabsorbed industrial lands, the majority are in the Industrial Edge District (1,991.7 ac), comprising 30.3% of the total unabsorbed land supply. This is followed by the Direct Control District (601.9 ac), Business Park (288.8 ac), and General Industry District (112.2 ac), representing 9.2%, 4.4%, and 1.7% of the unabsorbed land supply respectively. There are no unabsorbed lands within the Hamlet Industry, Low Intensity Industry, or Natural Resource Extraction districts.

All the agricultural business land included in this analysis is in the Agricultural Business District (127.3 ac), accounting for 1.9% of the total unabsorbed land supply.

In sum, the unabsorbed land supply in the County is predominantly made up of industrial lands in the Industrial Edge District (30.3%) and residential lands in the Residential Community District (21.7%). Other districts share less than 10.0% of the unabsorbed land supply, though the Cluster Residential (9.8%), industrial Direct Control (9.2%), and Highway Commercial (9.1%) districts come close to this threshold.

3.3.2 Central Growth Management District

Absorbed Land Supply

The Central GMD has a total of 21,708.5 ac of absorbed land, which represents 40.0% of the County-wide absorbed land supply. This is broken down by core land use as follows:

- 18,215.8 ac (83.9%) of absorbed residential lands;
- 458.0 ac (2.1%) of absorbed commercial lands;
- 2,839.0 ac (13.1%) of absorbed industrial lands; and
- 195.7 ac (0.9%) of absorbed agricultural business lands.

The breakdown of these categories by LUB district is presented in Table 3-4.

Table 3-4 Central Growth Management District Net Developable Absorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	-
Residential Community	403.6	1.9%	60.7%
Country Estate Residential	0.0	0.0%	-
Country Residential	17,806.2	82.0%	40.4%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	6.0	0.0%	100.0%
Residential Subtotal	18,215.8	83.9%	40.7%
Community Commercial	15.6	0.1%	19.5%
Commercial Direct Control	344.5	1.6%	48.7%
Highway Commercial	73.1	0.3%	100.0%
Rural Business	24.7	0.1%	40.5%
Commercial Subtotal	458.0	2.1%	49.7%
Business Park	115.5	0.5%	93.8%
Industrial Direct Control	3.7	0.0%	1.5%
Industrial Edge	96.9	0.4%	100.0%
General Industry	870.0	4.0%	100.0%
Hamlet Industry	147.8	0.7%	84.9%
Low Intensity Industry	43.9	0.2%	100.0%
Natural Resource Extraction	1,561.3	7.2%	23.2%
Industrial Subtotal	2,839.0	13.1%	34.3%
Agricultural Business	195.7	0.9%	53.2%
Agricultural Business Subtotal	195.7	0.9%	53.2%
Total Net Developable Absorbed Core Land Uses	21,708.5	100.0%	40.0%

As shown in Table 3-4, most absorbed residential lands are within the Country Residential District (17,806.2 ac), accounting for 82.0% of the absorbed land supply. This is followed by the Residential Community District (403.6 ac) and the Residential Multi-Family District (6.0 ac), which make up 1.9% and less than 0.1% of the absorbed land supply, respectively. There are no absorbed lands zoned under the Cluster Residential, Country Estate

Residential, or Residential Manufactured Home districts. The Central GMD encompasses 40.7% of the County-wide absorbed residential land supply.

In terms of absorbed commercial lands, most of them are zoned under a Direct Control District (344.5 ac), representing 1.6% of the absorbed land supply. This is followed by the Highway Commercial (73.1 ac), Rural Business (24.7 ac), and Community Commercial (15.6 ac) districts, which together constitute only 0.5% of the absorbed land supply. The Central GMD encompasses 49.7% of the County-wide absorbed commercial land supply.

Regarding absorbed industrial lands, the majority are in the Natural Resource Extraction District (1,561.3 ac), making up 7.2% of the absorbed land supply. This is followed by the General Industry (870.0 ac), Hamlet Industry (147.8 ac), Business Park (115.5 ac), Industrial Edge (96.9 ac), Low Intensity Industry (43.9 ac), and Direct Control (3.7 ac) districts, comprising 5.9% of the absorbed land supply. The Central GMD encompasses 34.3% of the County-wide absorbed industrial land supply.

All the agricultural business land included in this analysis is in the Agricultural Business District (195.7 ac), representing 0.9% of the total absorbed land supply. The Central GMD encompasses 53.2% of the County-wide absorbed agricultural business land supply.

Unabsorbed Land Supply

The Central GMD has a total of 5,817.0 ac of gross developable unabsorbed land, which represents 88.6% of the County-wide unabsorbed land supply. This is broken down by core land use as follows:

- 2,116.6 ac (36.4%) of unabsorbed residential lands;
- 690.7 ac (11.9%) of unabsorbed commercial lands;
- 2,882.4 ac (49.6%) of unabsorbed industrial lands; and
- 127.3 ac (2.2%) of unabsorbed agricultural business lands.

The breakdown of these categories by LUB district is presented in Table 3-5.

Table 3-5 Central Growth Management District Gross Developable Unabsorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	640.4	11.0%	100.0%
Residential Community	1,045.1	18.0%	73.5%
Country Estate Residential	32.5	0.6%	100.0%
Country Residential	309.3	5.3%	64.4%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	89.3	1.5%	97.0%
Residential Subtotal	2,116.6	36.4%	79.3%
Community Commercial	16.0	0.3%	27.1%
Commercial Direct Control	120.9	2.1%	100.0%
Highway Commercial	553.9	9.5%	92.7%
Rural Business	0.0	0.0%	-
Commercial Subtotal	690.7	11.9%	88.9%
Business Park	288.8	5.0%	100.0%
Industrial Direct Control	601.9	10.3%	100.0%
Industrial Edge	1,991.7	34.2%	100.0%
General Industry	0.0	0.0%	0.0%
Hamlet Industry	0.0	0.0%	-
Low Intensity Industry	0.0	0.0%	-
Natural Resource Extraction	0.0	0.0%	-
Industrial Subtotal	2,882.4	49.6%	96.3%
Agricultural Business	127.3	2.2%	100.0%
Agricultural Business Subtotal	127.3	2.2%	100.0%
Total Gross Developable Unabsorbed Land Supply	5,817.0	100.0%	88.6%

As shown in Table 3-5, most unabsorbed residential lands are within the Residential Community District (1,045.1 ac), accounting for 18.0% of the unabsorbed land supply. This is followed by the Cluster Residential District (640.4 ac) and Country Residential District (309.3 ac), which make up 11.0% and 5.3% of the unabsorbed land supply, respectively. Together, the Residential Multi-Family District (89.3 ac) and Country Estate Residential District (32.5 ac) represent only 2.1% of the unabsorbed land supply. There are no unabsorbed lands in the Residential Manufactured Home District. The Central GMD encompasses 79.3% of the County-wide unabsorbed residential land supply.

It is important to note that of the 1,045.1 ac of gross developable unabsorbed residential lands within the Residential Community District, 310.5 (29.7%) ac are within the Sirocco ASP, which is identified to be annexed by The City of Calgary, and 130.2 ac (12.5%) are within the Sanctuary on the Bow ASP, which is unlikely to be developed as the subject lands are within the flood plain of the Bow River. Excluding these two ASPs, the amount of gross developable unabsorbed residential lands within the Residential Community District is 604.4 ac, of which nearly all resides within the Highfield and Rowland Acres ASP.

Meanwhile, of the 640.4 ac of gross developable unabsorbed residential lands within the Cluster Residential District, 291.8 ac (45.6%) are within The Springs at DeWinton OP, which is unlikely to be developed as currently proposed. Excluding this ASP, the amount of gross developable unabsorbed residential lands within the Cluster Residential District is 348.6 ac, all of which resides within the Highfield and Rowland Acres ASP.

In terms of unabsorbed commercial lands, most of them are in the Highway Commercial District (553.9 ac), which constitutes 9.6% of the unabsorbed land supply. This is followed by the Direct Control (120.9 ac) and Community Commercial (16.0 ac) districts, making up 2.1% and 0.3% of the unabsorbed land supply, respectively. There are no unabsorbed lands in the Rural Business District. The Central GMD encompasses 88.9% of the County-wide unabsorbed commercial land supply.

Regarding unabsorbed industrial lands, the majority are in the Industrial Edge District (1,991.7 ac), comprising 34.4% of the unabsorbed land supply. This is followed by the Direct Control District (601.9 ac) and Business Park (288.8 ac), representing 10.4% and 5.0% of the unabsorbed land supply, respectively. There are no unabsorbed lands within the General Industry, Hamlet Industry, Low Intensity Industry, or Natural Resource Extraction districts. The Central GMD encompasses 96.3% of the County-wide unabsorbed industrial land supply.

All the agricultural business land included in this analysis is in the Agricultural Business District (127.3 ac), accounting for 1.9% of the total unabsorbed land supply. The Central GMD encompasses all the County-wide unabsorbed agricultural business land supply.

3.3.3 East Growth Management District

Absorbed Land Supply

The East GMD has a total of 3,524.8 ac of absorbed land, which represents 6.5% of the County-wide absorbed land supply. This is broken down by core land use as follows:

- 2,541.5 ac (72.1%) of absorbed residential lands;
- 99.6 ac (2.8%) of absorbed commercial lands;
- 865.4 ac (24.6%) of absorbed industrial lands; and
- 18.3 ac (0.5%) of absorbed agricultural business lands.

The breakdown of these categories by LUB district is presented in Table 3-6.

Table 3-6 East Growth Management District Net Developable Absorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	-
Residential Community	39.0	1.1%	5.9%
Country Estate Residential	0.0	0.0%	-
Country Residential	2,502.5	71.0%	5.7%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	0.0	0.0%	0.0%
Residential Subtotal	2,541.5	72.1%	5.7%
Community Commercial	25.3	0.7%	31.6%
Commercial Direct Control	74.3	2.1%	10.5%
Highway Commercial	0.0	0.0%	0.0%
Rural Business	0.0	0.0%	0.0%
Commercial Subtotal	99.6	2.8%	10.8%
Business Park	0.0	0.0%	0.0%
Industrial Direct Control	155.6	4.4%	63.7%
Industrial Edge	0.0	0.0%	0.0%
General Industry	0.0	0.0%	0.0%
Hamlet Industry	26.2	0.7%	15.1%
Low Intensity Industry	0.0	0.0%	0.0%
Natural Resource Extraction	683.6	19.4%	10.2%
Industrial Subtotal	865.4	24.6%	10.5%
Agricultural Business	18.3	0.5%	5.0%
Agricultural Business Subtotal	18.3	0.5%	5.0%
Total Net Developable Absorbed Core Land Uses	3,524.8	100.0%	6.5%

As shown in Table 3-6, most absorbed residential lands are within the Country Residential District (2,502.5 ac), accounting for 71.0% of the absorbed land supply. This is followed by the Residential Community District (39.0 ac), which makes up 1.1% of the absorbed land supply. There are no absorbed lands zoned under the Cluster Residential, Country Estate Residential, Residential Manufactured Home, or Residential Multi-Family districts. The East GMD encompasses 5.7% of the County-wide absorbed residential land supply.

In terms of absorbed commercial lands, most of them are zoned under a Direct Control District (74.3 ac), representing 2.1% of the absorbed land supply. This is followed by Community Commercial District (25.3 ac),

which constitutes only 0.7% of the absorbed land supply. There are no absorbed lands zoned under the Highway Commercial or Rural Business districts. The East GMD encompasses 10.8% of the County-wide absorbed commercial land supply.

Regarding absorbed industrial lands, the majority are in the Natural Resource Extraction District (683.6 ac), making up 19.4% of the absorbed land supply. This is followed by the Direct Control (155.6 ac) and Hamlet Industry (26.2 ac) districts, comprising 5.2% of the absorbed land supply. There are no absorbed lands zoned under the Business Park, Industrial Edge, General Industry, or Low Intensity Industry districts. The East GMD encompasses 10.5% of the County-wide absorbed industrial land supply.

All the agricultural business land included in this analysis is in the Agricultural Business District (18.3 ac), representing 0.5% of the absorbed land supply. The East GMD encompasses 5.0% of the County-wide absorbed agricultural business land supply.

Unabsorbed Land Supply

The East GMD has a total of 491.1 ac of gross developable unabsorbed land, which represents 7.5% of the County-wide unabsorbed land supply. This is broken down by core land use as follows:

- 292.5 ac (59.5%) of unabsorbed residential lands;
- 86.4 ac (17.6%) of unabsorbed commercial lands; and
- 112.2 ac (22.9%) of unabsorbed industrial lands.

The breakdown of these categories by LUB district is presented in Table 3-7.

Table 3-7 East Growth Management District Gross Developable Unabsorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	0.0%
Residential Community	292.5	59.5%	20.6%
Country Estate Residential	0.0	0.0%	0.0%
Country Residential	0.0	0.0%	0.0%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	0.0	0.0%	0.0%
Residential Subtotal	292.5	59.5%	11.0%
Community Commercial	42.9	8.7%	72.9%
Commercial Direct Control	0.0	0.0%	0.0%
Highway Commercial	43.6	8.9%	7.3%
Rural Business	0.0	0.0%	-
Commercial Subtotal	86.4	17.6%	11.1%
Business Park	0.0	0.0%	0.0%
Industrial Direct Control	0.0	0.0%	0.0%
Industrial Edge	0.0	0.0%	0.0%
General Industry	112.2	22.9%	100.0%
Hamlet Industry	0.0	0.0%	-
Low Intensity Industry	0.0	0.0%	-
Natural Resource Extraction	0.0	0.0%	-
Industrial Subtotal	112.2	22.9%	3.7%
Agricultural Business	0.0	0.0%	0.0%
Agricultural Business Subtotal	0.0	0.0%	0.0%
Total Gross Developable Unabsorbed Land Supply	491.1	100.0%	7.5%

As shown in Table 3-7, all unabsorbed residential lands are in the Hamlet of Blackie ASP within the Residential Community District (292.5 ac), accounting for 59.5% of the unabsorbed land supply. There are no unabsorbed lands in the Cluster Residential, Country Estate Residential, Country Residential, Residential Manufactured Home, or Residential Multi-Family districts. The East GMD encompasses 11.0% of the County-wide unabsorbed residential land supply.

In terms of unabsorbed commercial lands, they are similarly distributed across the Highway Commercial District (43.6 ac) and Community Commercial (42.9 ac), which constitute 8.9% and 8.7% of the unabsorbed land supply,

respectively. There are no unabsorbed lands in the Direct Control or Rural Business districts. The East GMD encompasses 11.1% of the County-wide unabsorbed commercial land supply.

Regarding unabsorbed industrial lands, all of them are in the General Industry District (112.2 ac), comprising 22.9% of the unabsorbed land supply. There are no unabsorbed lands within the Business Park, Direct Control, Industrial Edge, Hamlet Industry, Low Intensity Industry, or Natural Resource Extraction districts. The East GMD encompasses 3.7% of the County-wide unabsorbed industrial land supply.

There are no unabsorbed agricultural business lands in the East GMD.

3.3.4 Northwest Growth Management District

Absorbed Land Supply

The Northwest GMD has a total of 17,667.0 ac of absorbed land, which represents 32.6% of the County-wide absorbed land supply. This is broken down by core land use as follows:

- 15,916.7 ac (90.1%) of absorbed residential lands;
- 259.3 ac (1.5%) of absorbed commercial lands;
- 1,337.1 ac (7.6%) of absorbed industrial lands; and
- 154.0 ac (0.9%) of absorbed agricultural business lands.

The breakdown of these categories by LUB district is presented in Table 3-8.

Table 3-8 Northwest Growth Management District Net Developable Absorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	-
Residential Community	173.2	1.0%	26.1%
Country Estate Residential	0.0	0.0%	-
Country Residential	15,743.6	89.1%	35.8%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	0.0	0.0%	0.0%
Residential Subtotal	15,916.7	90.1%	35.6%
Community Commercial	29.3	0.2%	36.6%
Commercial Direct Control	229.9	1.3%	32.5%
Highway Commercial	0.0	0.0%	0.0%
Rural Business	0.0	0.0%	0.0%
Commercial Subtotal	259.3	1.5%	28.1%
Business Park	0.0	0.0%	0.0%
Industrial Direct Control	49.8	0.3%	20.4%
Industrial Edge	0.0	0.0%	0.0%
General Industry	0.0	0.0%	0.0%
Hamlet Industry	0.0	0.0%	0.0%
Low Intensity Industry	0.0	0.0%	0.0%
Natural Resource Extraction	1,287.2	7.3%	19.2%
Industrial Subtotal	1,337.1	7.6%	16.2%
Agricultural Business	154.0	0.9%	41.8%
Agricultural Business Subtotal	154.0	0.9%	41.8%
Total Net Developable Absorbed Core Land Uses	17,667.0	100.0%	32.6%

As shown in Table 3-8, most absorbed residential lands are within the Country Residential District (15,743.6 ac), accounting for 89.1% of the absorbed land supply. This is followed by the Residential Community District (173.2 ac), which makes up 1.0% the absorbed land supply. There are no absorbed lands zoned under the Cluster Residential, Country Estate Residential, Residential Manufactured Home, or Residential Multi-Family districts. The Northwest GMD encompasses 35.6% of the County-wide absorbed residential land supply.

In terms of absorbed commercial lands, most of them are zoned under the Direct Control District (229.9 ac), representing 1.3% of the absorbed land supply. This is followed by the Community Commercial District (29.3 ac),

which constitutes only 0.2% of the absorbed land supply. There are no absorbed lands zoned under the Highway Commercial or Rural Business districts. The Northwest GMD encompasses 28.1% of the County-wide absorbed commercial land supply.

Regarding absorbed industrial lands, the majority are in the Natural Resource Extraction District (1,287.2 ac), making up 7.3% of the absorbed land supply. This is followed by the Direct Control District (49.8 ac), comprising 0.3% of the absorbed land supply. There are no absorbed lands zoned under the Business Park, Industrial Edge, General Industry, Hamlet Industry, or Low Intensity Industry districts. The Northwest GMD encompasses 16.2% of the County-wide absorbed industrial land supply.

All the agricultural business land included in this analysis is in the Agricultural Business District (154.0 ac), representing 0.9% of the total absorbed land supply. The Northwest GMD encompasses 41.8% of the County-wide absorbed agricultural business land supply.

Unabsorbed Land Supply

The Northwest GMD has a total of 169.3 ac of gross developable unabsorbed land, which represents 2.6% of the County-wide unabsorbed land supply. As presented in Table 3-9, the unabsorbed land supply includes only unabsorbed residential lands zoned under the Country Residential District. With this, the Northwest GMD encompasses 6.3% of the County-wide unabsorbed residential land supply. There are no unabsorbed commercial, industrial or agricultural business lands in this GMD.

Table 3-9 Northwest Growth Management District Gross Developable Unabsorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	0.0%
Residential Community	0.0	0.0%	0.0%
Country Estate Residential	0.0	0.0%	0.0%
Country Residential	169.3	100.0%	35.2%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	0.0	0.0%	0.0%
Residential Subtotal	169.3	100.0%	6.3%
Community Commercial	0.0	0.0%	0.0%
Commercial Direct Control	0.0	0.0%	0.0%
Highway Commercial	0.0	0.0%	0.0%
Rural Business	0.0	0.0%	-
Commercial Subtotal	0.0	0.0%	0.0%
Business Park	0.0	0.0%	0.0%
Industrial Direct Control	0.0	0.0%	0.0%
Industrial Edge	0.0	0.0%	0.0%
General Industry	0.0	0.0%	0.0%
Hamlet Industry	0.0	0.0%	-
Low Intensity Industry	0.0	0.0%	-
Natural Resource Extraction	0.0	0.0%	-
Industrial Subtotal	0.0	0.0%	0.0%
Agricultural Business	0.0	0.0%	0.0%
Agricultural Business Subtotal	0.0	0.0%	0.0%
Total Gross Developable Unabsorbed Land Supply	169.3	100.0%	2.6%

3.3.5 South Central Growth Management District

Absorbed Land Supply

The South Central GMD has a total of 10,392.0 ac of absorbed land, which represents 19.2% of the County-wide absorbed land supply. This is broken down by core land use as follows:

- 7,269.6 ac (70.0%) of absorbed residential lands;

- 98.7 ac (0.9%) of absorbed commercial lands; and
- 3,023.7 ac (29.1%) of absorbed industrial lands.

The breakdown of these categories by LUB district is presented in Table 3-10.

Table 3-10 South Central Growth Management District Net Developable Absorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	-
Residential Community	44.3	0.4%	6.7%
Country Estate Residential	0.0	0.0%	-
Country Residential	7,225.4	69.5%	16.4%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	0.0	0.0%	0.0%
Residential Subtotal	7,269.6	70.0%	16.3%
Community Commercial	9.2	0.1%	11.5%
Commercial Direct Control	53.2	0.5%	7.5%
Highway Commercial	0.0	0.0%	0.0%
Rural Business	36.3	0.3%	59.5%
Commercial Subtotal	98.7	0.9%	10.7%
Business Park	7.7	0.1%	6.2%
Industrial Direct Control	0.0	0.0%	0.0%
Industrial Edge	0.0	0.0%	0.0%
General Industry	0.0	0.0%	0.0%
Hamlet Industry	0.0	0.0%	0.0%
Low Intensity Industry	0.0	0.0%	0.0%
Natural Resource Extraction	3,016.0	29.0%	44.9%
Industrial Subtotal	3,023.7	29.1%	36.6%
Agricultural Business	0.0	0.0%	0.0%
Agricultural Business Subtotal	0.0	0.0%	0.0%
Total Net Developable Absorbed Core Land Uses	10,392.0	100.0%	19.2%

As shown in Table 3-10, most absorbed residential lands are within the Country Residential District (7,225.4 ac), accounting for 69.5% of the absorbed land supply. This is followed by the Residential Community District (44.3

ac), which makes up 0.4% of the absorbed land supply. There are no absorbed lands zoned under the Cluster Residential, Country Estate Residential, Residential Manufactured Home or Residential Multi-Family districts. The South Central GMD encompasses 16.3% of the County-wide absorbed residential land supply.

In terms of absorbed commercial lands, most of them are zoned under the Direct Control District (53.2 ac), representing 0.5% of the absorbed land supply. This is followed by the Rural Business (36.3 ac) and Community Commercial (9.2 ac) districts, which together constitute 0.4% of the absorbed land supply. There are no absorbed lands zoned under the Highway Commercial District. The South Central GMD encompasses 10.7% of the County-wide absorbed commercial land supply.

Regarding absorbed industrial lands, the majority are in the Natural Resource Extraction District (3,016.0 ac), making up 29.0% of the absorbed land supply. This is followed by the Business Park District (7.7 ac), comprising 0.1% of the absorbed land supply. There are no absorbed lands zoned under the Direct Control, Industrial Edge, General Industry, Hamlet Industry, or Low Intensity Industry districts. The South Central GMD encompasses 36.6% of the County-wide absorbed industrial land supply.

Unabsorbed Land Supply

The South Central GMD has a total of 89.9 ac of gross developable unabsorbed land, which represents 1.4% of the County-wide unabsorbed land supply. As presented in Table 3-11, the unabsorbed land supply includes only unabsorbed residential lands zoned under the Residential Community (85.3 ac or 94.8%), Residential Multi-Family (2.8 ac or 3.1%), and Country Residential (1.9 ac or 2.1%) districts. All unabsorbed residential parcels are within the Hamlet of Cayley ASP, Muir Ranch ACP, and Meadow Creek ASP. With this, the South Central GMD encompasses 3.4% of the County-wide unabsorbed residential land supply. There are no unabsorbed commercial, industrial or agricultural business lands in this GMD.

Table 3-11 South Central Growth Management District Gross Developable Unabsorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	0.0%
Residential Community	85.3	94.8%	6.0%
Country Estate Residential	0.0	0.0%	0.0%
Country Residential	1.9	2.1%	0.4%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	2.8	3.1%	3.0%
Residential Subtotal	89.9	100.0%	3.4%
Community Commercial	0.0	0.0%	0.0%
Commercial Direct Control	0.0	0.0%	0.0%
Highway Commercial	0.0	0.0%	0.0%
Rural Business	0.0	0.0%	-
Commercial Subtotal	0.0	0.0%	0.0%
Business Park	0.0	0.0%	0.0%
Industrial Direct Control	0.0	0.0%	0.0%
Industrial Edge	0.0	0.0%	0.0%
General Industry	0.0	0.0%	0.0%
Hamlet Industry	0.0	0.0%	-
Low Intensity Industry	0.0	0.0%	-
Natural Resource Extraction	0.0	0.0%	-
Industrial Subtotal	0.0	0.0%	0.0%
Agricultural Business	0.0	0.0%	0.0%
Agricultural Business Subtotal	0.0	0.0%	0.0%
Total Gross Developable Unabsorbed Land Supply	89.9	100.0%	1.4%

3.3.6 Southwest Growth Management District

Absorbed Land Supply

The Southwest GMD has a total of 968.8 ac of absorbed land, which represents 1.8% of the County-wide absorbed land supply. This is broken down by core land use as follows:

- 757.8 ac (78.2%) of absorbed residential lands;

- 6.8 ac (0.7%) of absorbed commercial lands; and
- 204.3 ac (21.1%) of absorbed industrial lands.

The breakdown of these categories by LUB district is presented in Table 3-12.

Table 3-12 Southwest Growth Management District Net Developable Absorbed Land Supply

Core Land Use District	Acres	Percentage of GMD Total	Percentage of County Total
Cluster Residential	0.0	0.0%	-
Residential Community	4.4	0.5%	0.7%
Country Estate Residential	0.0	0.0%	-
Country Residential	753.4	77.8%	1.7%
Residential Manufactured Home	0.0	0.0%	-
Residential Multi-Family	0.0	0.0%	0.0%
Residential Subtotal	757.8	78.2%	1.7%
Community Commercial	0.6	0.1%	0.8%
Commercial Direct Control	6.1	0.6%	0.9%
Highway Commercial	0.0	0.0%	0.0%
Rural Business	0.0	0.0%	0.0%
Commercial Subtotal	6.8	0.7%	0.7%
Business Park	0.0	0.0%	0.0%
Industrial Direct Control	35.3	3.6%	14.5%
Industrial Edge	0.0	0.0%	0.0%
General Industry	0.0	0.0%	0.0%
Hamlet Industry	0.0	0.0%	0.0%
Low Intensity Industry	0.0	0.0%	0.0%
Natural Resource Extraction	169.0	17.4%	2.5%
Industrial Subtotal	204.3	21.1%	2.5%
Agricultural Business	0.0	0.0%	0.0%
Agricultural Business Subtotal	0.0	0.0%	0.0%
Total Net Developable Absorbed Core Land Uses	968.8	100.0%	1.8%

As shown in Table 3-12, most absorbed residential lands are within the Country Residential District (753.4 ac), accounting for 77.8% of the absorbed land supply. This is followed by the Residential Community District (4.4 ac),

which makes up 0.5% of the absorbed land supply. There are no absorbed lands zoned under the Cluster Residential, Country Estate Residential, Residential Manufactured Home, or Residential Multi-Family districts. The Southwest GMD encompasses 1.7% of the County-wide absorbed residential land supply.

In terms of absorbed commercial lands, most of them are zoned under the Direct Control District (6.1 ac), representing 0.6% of the absorbed land supply. This is followed by the Community Commercial District (0.6 ac), which constitutes 0.1% of the absorbed land supply. There are no absorbed lands zoned under the Highway Commercial or Rural Business districts. The Southwest GMD encompasses 0.7% of the County-wide absorbed commercial land supply.

Regarding absorbed industrial lands, the majority are in the Natural Resource Extraction District (169.0 ac), making up 17.4% of the absorbed land supply. This is followed by the Direct Control District (35.3 ac), comprising 3.6% of the absorbed land supply. There are no absorbed lands zoned under the Business Park, Industrial Edge, General Industry, Hamlet Industry, or Low Intensity Industry districts. The Southwest GMD encompasses 2.5% of the County-wide absorbed industrial land supply.

There are no absorbed agricultural business lands in the Southwest GMD.

Unabsorbed Land Supply

The Southwest Growth Management District does not have any unabsorbed land.

3.4 Vacant Lands

Vacant lands are parcels that are zoned and subdivided (i.e., absorbed) that are not yet developed. They are a subset of the County’s absorbed land supply. Table 3-13 presents a breakdown of all parcels within the County’s absorbed country residential land supply, ranging from 2 acres to less than 21 acres, by occupancy (i.e., developed) and vacancy (i.e., undeveloped) status.

Table 3-13 Occupied and Vacant Country Residential Parcels

Size Range (acres)	Occupied Parcels	Occupied Percentage	Vacant Parcels	Vacant Percentage	Total Parcels
2 – 4.99 ac	2,721	94.1%	170	5.9%	2,891
5 – 9.99 ac	1,661	97.0%	51	3.0%	1,712
10 – 14.99 ac	668	98.7%	9	1.3%	677
15 – 20.99 ac	621	98.7%	8	1.3%	629
Total	5,671	96.0%	238	4.0%	5,909

Of the total 5,909 country residential parcels, 238 (or 4.0%) are vacant while 5,671 (96.0%) are occupied. Of the 4,603 parcels ranging in size from 2 to 9.99 acres, 221 (4.8%) are vacant while 4,382 (95.2%) are occupied.

4. Growth Methodology

Growth in communities generally consists of two core components:

- the natural rate of population growth, reflective of the fertility and mortality rates of the population; and
- in- or out-migration driven by the prevailing local/regional/provincial economic conditions and the associated demand for labour in the community.

Nichols has developed a growth model that incorporates both the natural rate of population growth as well as a detailed labour market that reflects the relative labour demand and supply in the County driving in- or out-migration. This labour market is tied to overall economic conditions in the Calgary region and province overall and community-specific family structures are used to estimate in- or out-migration associated with labour market changes.

In an effort to reflect the uncertainty associated with forecasting, we apply a Monte Carlo simulation to identify a distribution of possible future outcomes that are used to inform specific growth scenarios.

Using the above-described methodology, the Study Team has developed three projection scenarios (baseline, low, and high) for population and employment in the County from 2025 to 2045. Detailed descriptions of the assumptions and results of each scenario are provided in Section 5.

5. Projections

5.1 Population and Employment

A summary of the assumptions and projection results for baseline, low, and high forecast scenarios are presented in the sub-sections below. Key inputs and assumptions that apply to all scenarios include the following:

- Fertility and mortality rates in the County are based on the historical distributions and trends of fertility and mortality rates in the County between 2001 and 2023.
- The Labour force composition in the County is consistent with the 3-digit NAIC breakdown presented in the 2021 federal census.
- The labour force participation rate is 66.5% over the forecast period (consistent with the 2021 federal census rate).
- The unemployment rate between 2022 and 2024 is based on the Calgary CMA unemployment rate (Statistics Canada 2025b), adjusted based on the relationship between Foothills' unemployment and the CMA's unemployment as per the 2021 census (0.71/1) (Statistics Canada 2021). From 2025 on, the unemployment rate is assumed to be 5% (a long-term "full employment" unemployment rate)
- Employment growth in the County is adjusted in to ensure the model produces a population estimate in 2025 consistent with the Statistics Canada postcensal estimate (25,789) (Statistics Canada 2025a).⁴

Note that the resulting projections are rounded to the nearest 5.

5.1.1 Baseline Scenario

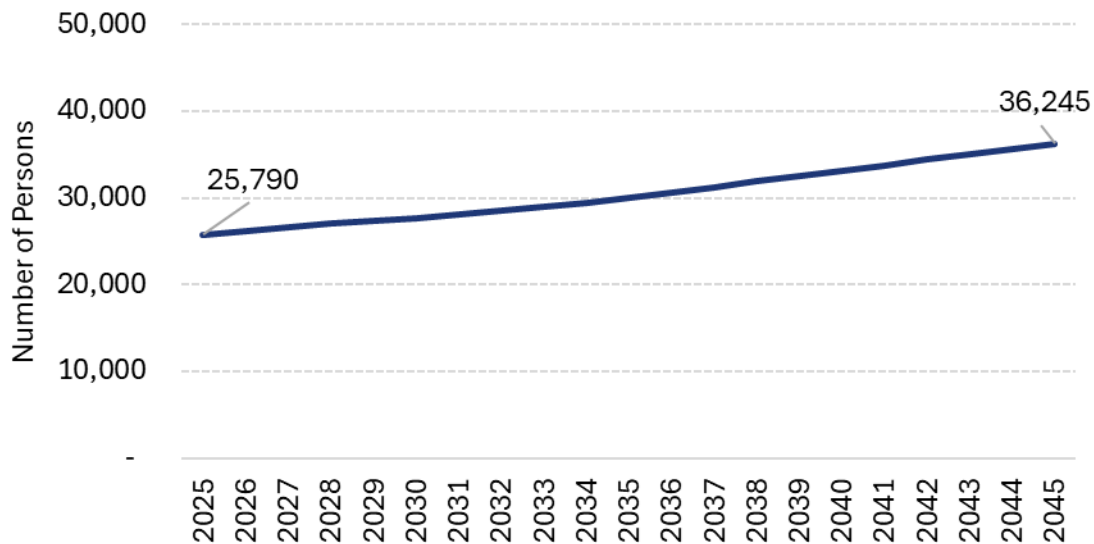
The baseline growth scenario projects population and employment in the County over the 2025 – 2045 period, relying on the following economic growth assumption:

- Beginning in 2026, employment growth in the County declines by 0.2 percentage points per year until reaching a long-term rate of 1.5% (reached in 2030), consistent with employment growth in the Calgary CMA between the 2001 and 2021 federal censuses, and in line with employment growth in the County between 2001 and 2006 federal censuses.

Based on both the natural rate of population growth and in-migration driven by the labour market, it is expected that the population of the County will increase to approximately 36,245 by 2045 under baseline projection assumptions (Figure 5-1). The estimated compound annual growth rate (CAGR) for the entire period (2025-2045) is approximately 1.7%.

⁴ Employment growth refers to growth in employed residents. These residents may be employed at jobs located within the County or elsewhere that they commute to.

Figure 5-1 Population Projection, Foothills County (2025 – 2045) – Baseline Scenario



As noted above, employment in the County is assumed to reach a long-term rate of 1.5% by 2030. By the end of the forecast period, it is estimated that employment in the County will reach roughly 19,010 (Table 5-1).

Table 5-1 Employment Projection, Foothills County (2025 – 2045) – Baseline Scenario

Year	Population	Total Employment
2025	25,790	13,895
2030	27,710	15,205
2035	30,000	16,380
2040	33,145	17,645
2045	36,245	19,010

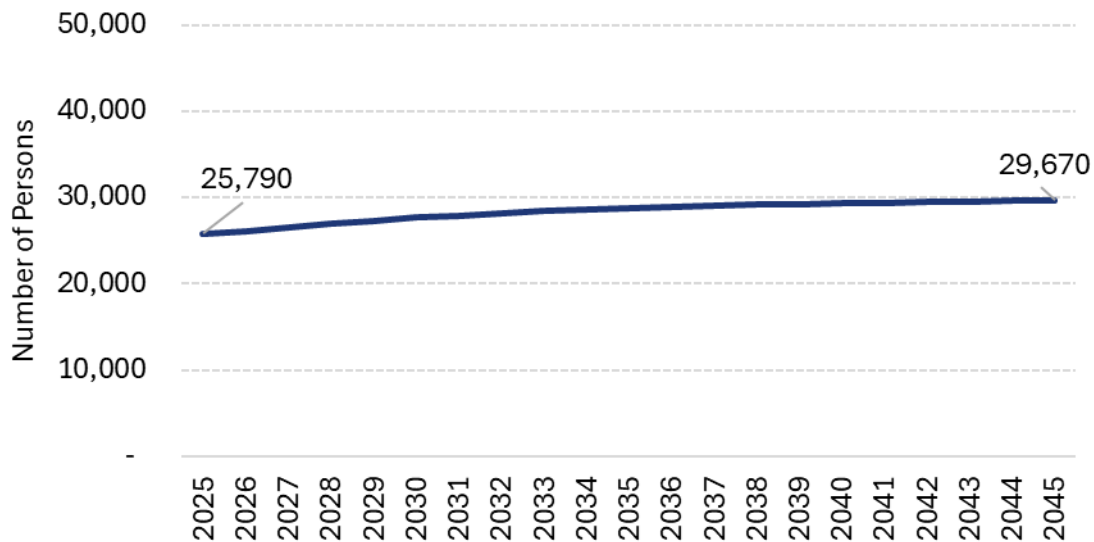
5.1.2 Low Scenario

The low growth scenario projects population and employment in the County over the 2025 – 2045 period, relying on the following employment growth assumption:

- Beginning in 2026, employment growth in the County declines by 0.2 percentage points per year until reaching a long-term rate of 0.0% (reached in 2037), consistent with low employment growth experienced in the County between 2006 and 2021.

Based on both the natural rate of population growth and in-migration driven by the labour market, it is expected that the population of the County will increase marginally to approximately 29,670 by 2045 under low projection assumptions (Figure 5-2). The estimated CAGR for the entire period (2021-2045) is approximately 0.7%.

Figure 5-2 Population Projection, Foothills County (2025 – 2045) – Low Scenario



As noted above, employment in the County is assumed to reach a long-term rate of 0.0% by 2037. By the end of the forecast period, it is estimated that employment in the County will reach roughly 15,835 (Table 5-2). It is important to note that while the assumed long-term employment rate in the County is 0%, there is still some positive employment growth in the short-term before reaching the long-term rate. Furthermore, stable employment availability can still encourage in-migration as people move into a community to fill employment openings created by retirees, potentially bringing additional family members as well.⁵

Table 5-2 Employment Projection, Foothills County (2025 – 2045) – Low Scenario

Year	Population	Total Employment
2025	25,790	13,895
2030	27,675	15,190
2035	28,770	15,805
2040	29,320	15,835
2045	29,670	15,835

5.1.3 High Scenario

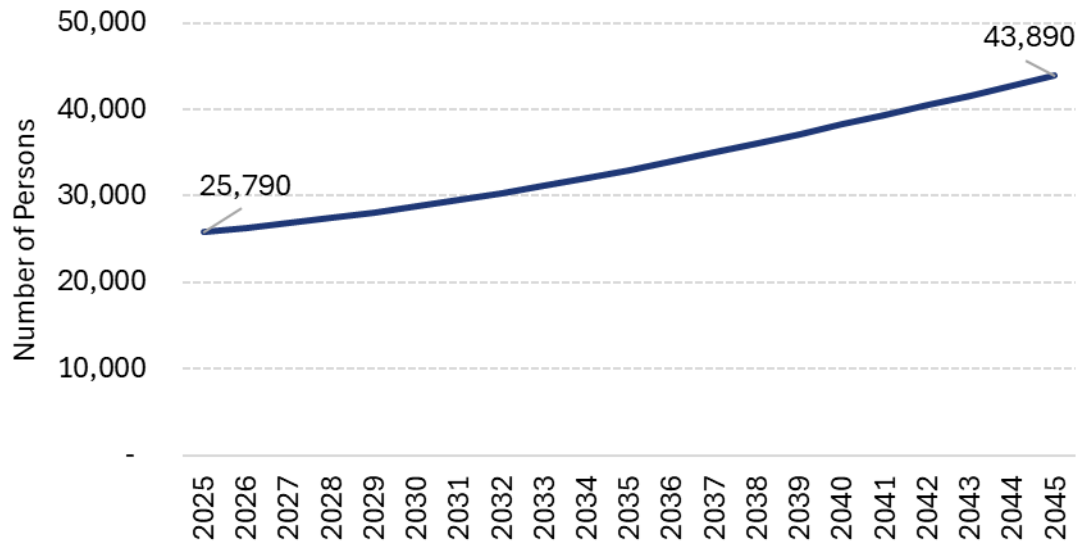
The high growth scenario projects population and employment in the County over the 2025 – 2045 period, relying on the following employment growth assumption:

- Beginning in 2026, employment growth in the County reaches a long-term rate of 2.5%, consistent with high growth experienced in the County experienced in the County between 2023 and 2024.

⁵ Note that in this instance, employment refers to whether or not residents of the community are employed, not necessarily that their job is located in the County.

Based on both the natural rate of population growth and in-migration driven by the labour market, it is expected that the population of the County will increase to approximately 43,890 by 2045 under high projection assumptions (Figure 5-3). The estimated CAGR for the entire period (2021-2045) is approximately 2.7%.

Figure 5-3 Population Projection, Foothills County (2025 – 2045) – High Scenario



As noted above, employment in the County is assumed to reach a long-term rate of 2.5%. By the end of the forecast period, it is estimated that employment in the County will reach roughly 22,765 (Table 5-3).

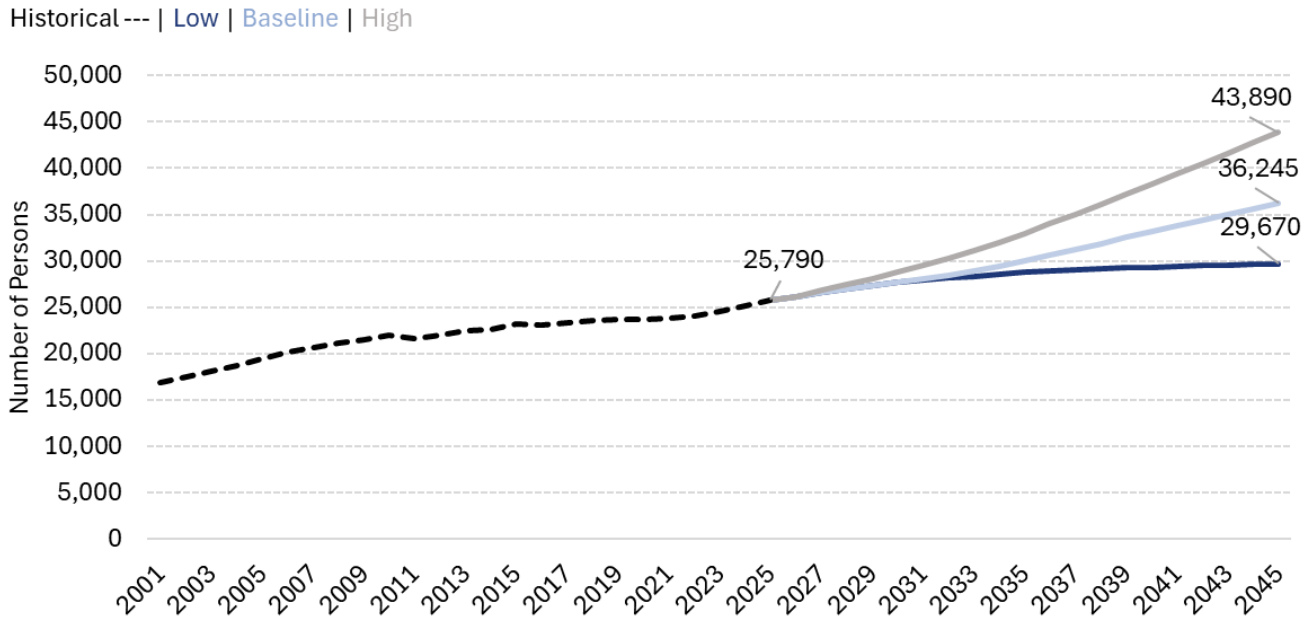
Table 5-3 Employment Projection, Foothills County (2025 – 2045) – High Scenario

Year	Population	Total Employment
2025	25,790	13,895
2030	28,820	15,720
2035	32,970	17,785
2040	38,260	20,120
2045	43,890	22,765

5.1.4 Projection Comparisons

The three population projection scenarios presented above, along with historical population growth in the County, are depicted below in Figure 5-4.

Figure 5-4 Historical Population and Population Projections, Foothills County (2025 – 2045) – Low, Baseline, and High Scenarios

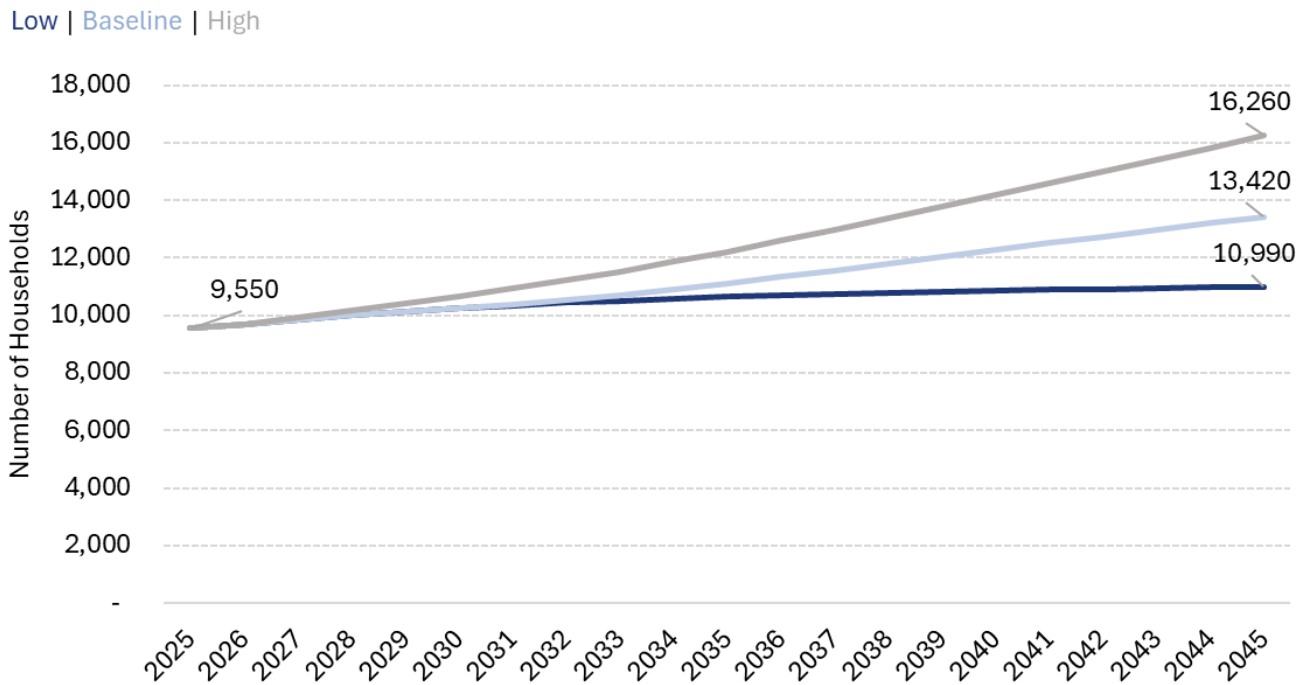


5.2 Housing

As of 2025, it is estimated that the County hosts roughly 9,550 housing units.⁶ Over the 2025 – 2045 period, it is projected that the County will add between 1,440 and 6,710 housing units, for total housing of roughly 10,990 to 16,260 across low, baseline, and high growth scenarios (Figure 5-5).

⁶ This estimate is based on a 2025 population of 25,790 (Statistics Canada 2025a) and an average household size of 2.7 (per the 2021 census) – an increase from 9,075 total private dwellings hosted in the County in 2021 (Statistics Canada 2021). Note that this includes residential properties on agricultural land, although housing growth is assumed to occur entirely on non-agricultural land.

Figure 5-5 Housing Projections, Foothills County (2025 – 2045) – Low, Baseline, and High Scenarios



5.3 Land

Projections were developed at a high-level for residential and non-residential land needs in the County over the 2025 – 2045 period. Overviews of the approach and results of the land projections for each growth scenario are described below.

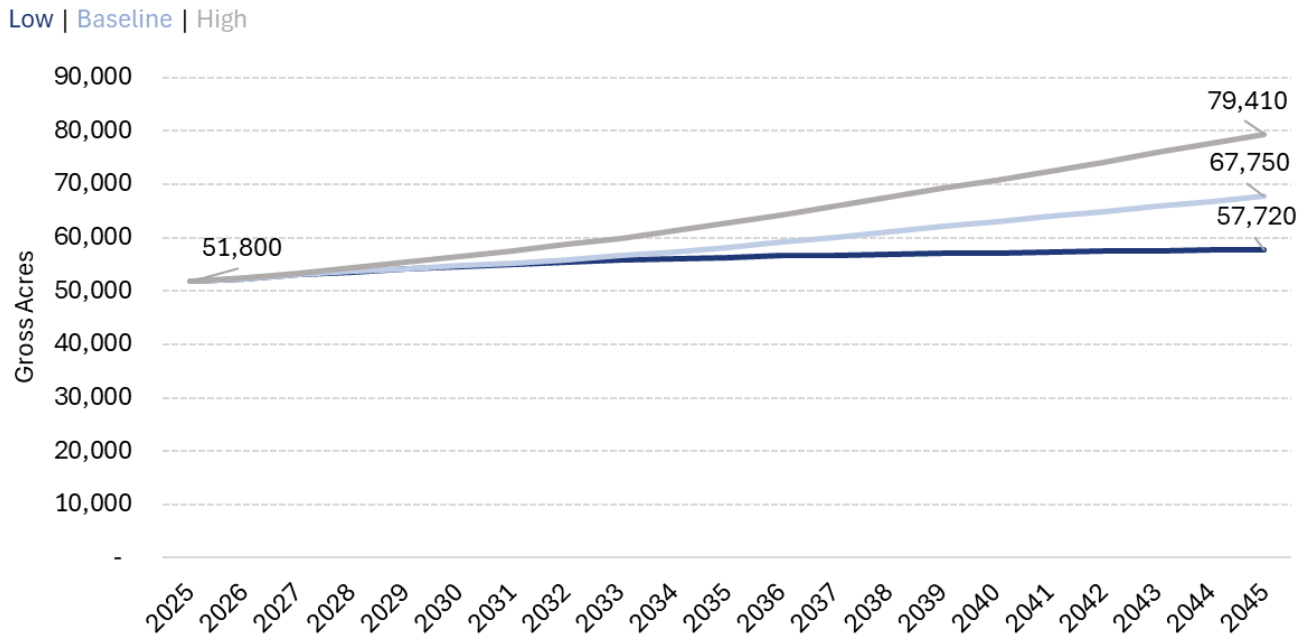
5.3.1 Residential Land

Future residential land needs in the County were estimated based on population and housing growth projections (described above) and residential density assumptions. Specifically, it is assumed that:

- Household size in the County remains at 2.7 people per household (as per the 2021 census, Statistics Canada 2021).
- Residential land density in the County is considered under two scenarios:
 - 0.2 dwelling units per gross acre (UPA); this scenario assumes that all new residential development is low-density, Country Residential growth.
 - 3 dwelling units per gross acre (UPA); this scenario assumes that all new residential development is higher-density, Residential Community or Residential Multi-Family growth.

The 0.2 UPA density is relied upon to forecast land needs under the aforementioned low, baseline, and high growth scenarios. Under this density assumption, it is projected that the County will host between 57,720 and 79,410 gross acres of Country Residential land across low, baseline, and high growth scenarios by 2045 (Figure 5-6). These projections translate to an increase of between roughly 5,923 and 27,607 gross acres of Country Residential land.

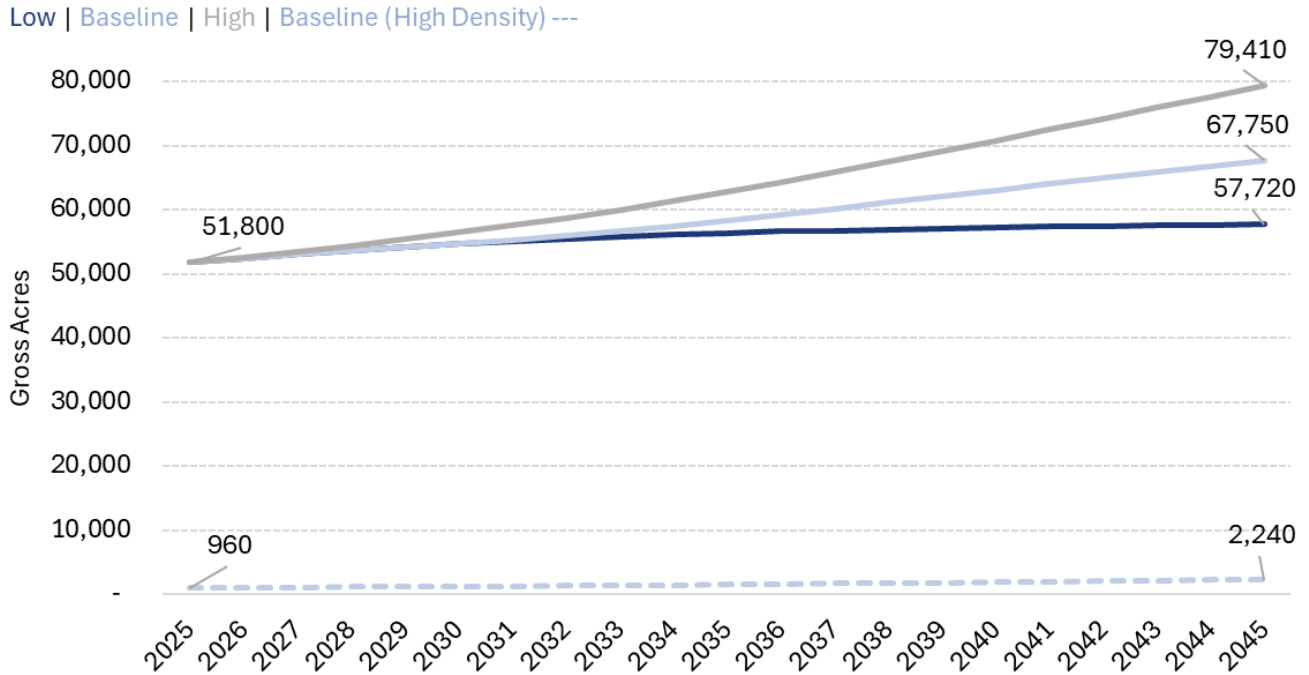
Figure 5-6 Residential Land Projections, Foothills County (2025 – 2045) – Low, Baseline, and High Scenarios (0.2 UPA, Country Residential)



Notes: The County's 51,800 gross acres of existing absorbed Country Residential lands are based off the land supply analysis (44,031 net developable absorbed land supply, assuming net area is 85% of gross area for Country Residential lands).

Alternatively, should the County develop residential land at a higher density on Residential Community and Residential Multi-Family lands, less land would be required. At a density of 3.0 UPA, under baseline growth conditions, the County's Residential Community/Multi-Family land is projected to grow from 960 gross acres to 2,240 gross acres by 2045 (Figure 5-7). This projection translates to an increase of roughly 1,280 gross acres of Residential Community/Residential Multi-Family land.

Figure 5-7 Residential Land Projections, Foothills County (2025 – 2045) – Low, Baseline, and High Scenarios (0.2 UPA, Country Residential), and Alternative Baseline Scenario (3 UPA, Residential Community/Multi-Family)



Notes: The County’s 51,800 gross acres of existing absorbed Country Residential lands are based off the land supply analysis (44,031 net acres of developable absorbed land supply, assuming net area is 85% of gross area for Country Residential lands). Similarly, the County’s 960 gross acres of existing absorbed Residential Community/Multi-Family lands are based off of the land supply analysis (671 net acres of developable absorbed land supply, assuming net area is 70% of gross area for Residential Community/Multi-Family lands).

According to the land supply analysis described in Section 3, the County hosts approximately 481 gross acres of developable, unabsorbed Country Residential land, and 1,515 gross acres of developable, unabsorbed Community Residential/Multi-Family land. The low-density (0.2 UPA) Country Residential growth contemplated in this work suggests that the County would require additional residential land almost immediately if exclusively low-density growth were to occur (Table 5-4).). Conversely, high-density (3 UPA) Residential Community/Multi-Family growth is easily accommodated within the County’s existing unabsorbed Residential Community/Multi-Family area under baseline growth conditions (Table 5-4).

Table 5-4 Unabsorbed Residential Land Depletion, Foothills County (2025 – 2045) – Low, Baseline, and High Scenarios (0.2 UPA, Country Residential), and Alternative Baseline Scenario (3 UPA, Residential Community/Multi-Family)

Year	Low Unabsorbed Gross Country Residential Acres Remaining	Baseline Country Residential Acres Remaining	High	Baseline (High Density) Unabsorbed Gross Residential Community/Multi-Family Acres Remaining
2025	481	481	481	1,515
2026	-	-	-	1,475
2027	-	-	-	1,425
2028	-	-	-	1,365
2029	-	-	-	1,335
2030	-	-	-	1,285
2031	-	-	-	1,245
2032	-	-	-	1,185
2033	-	-	-	1,125
2034	-	-	-	1,065
2035	-	-	-	995
2036	-	-	-	925
2037	-	-	-	845
2038	-	-	-	765
2039	-	-	-	685
2040	-	-	-	615
2041	-	-	-	525
2042	-	-	-	445
2043	-	-	-	375
2044	-	-	-	305
2045	-	-	-	235

5.3.2 Non-Residential Land

Future non-residential land needs in the County were estimated based on job growth projected to take place within the County. Using projected employment of County residents, the number of jobs hosted within the County in a given year was estimated by adjusting for the following factors based on historical census data:

- *The proportion of employed persons who work at home by NAICS sector:* The COVID-19 pandemic prompted a variety of public health measures that restricted public gatherings and the ability of employees to work in the

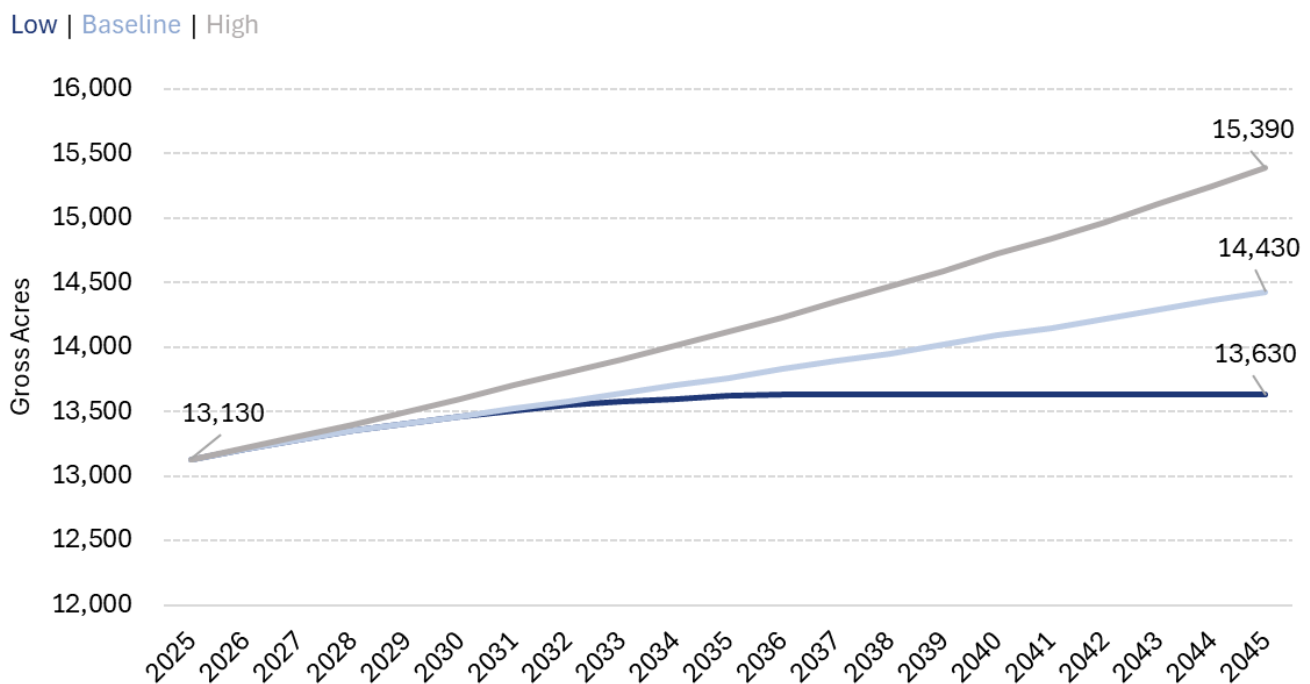
office. The 2021 census data reflect the work from home trend brought about by the pandemic, with roughly 35% of employees living in the County working from home as compared to just 21% in 2016 (Statistics Canada 2016, 2021). Following the lift in public health restrictions many employees returned to the office, but it is expected that many workers will continue to work from home to a larger degree than before the pandemic. As such, we assume the proportion of employed persons who work at home in the County to be the average of 2016 and 2021 census data (roughly 28% overall).

- *The proportion of employed persons who do not have a fixed workplace or who work outside of Canada by NAICS sector:* Again, we assume these proportions to be the average of 2016 and 2021 census data.
- *The commuting patterns of employed persons travelling in and out of the County by NAICS subsector:* We assume commuting patterns of employed residents of the County and surrounding municipalities based on 2021 census data. The ratio of out-commuters to in-commuters stays constant over the forecast.

Given these assumptions, it is estimated that the County has a relatively low employment density of roughly 11 jobs per gross non-residential acre.

By 2045, it is projected that the County will host between 13,630 and 15,390 gross acres of non-residential land across low, baseline, and high growth scenarios (Figure 5-8).

Figure 5-8 Non-Residential Land Projections, Foothills County (2025 – 2045) – Low, Baseline, and High Scenarios



Notes: The County’s 13,130 gross acres of existing absorbed residential lands are based off land supply analysis (9,192 net developable absorbed land supply, assuming net area is 70% of gross area).

The above-described land projection translates to an increase of between 500 and 2,260 gross non-residential acres over the forecast period. According to the land supply analysis, the County currently has 3,766 gross acres

of undeveloped non-residential lands. As such, the growth scenarios contemplated in this work suggest that the County will not require additional non-residential land to accommodate the projected growth to 2045 (Table 5-5).

Table 5-5 Unabsorbed Non-Residential Land Depletion, Foothills County (2025 – 2045) – Low, Baseline, and High Scenarios

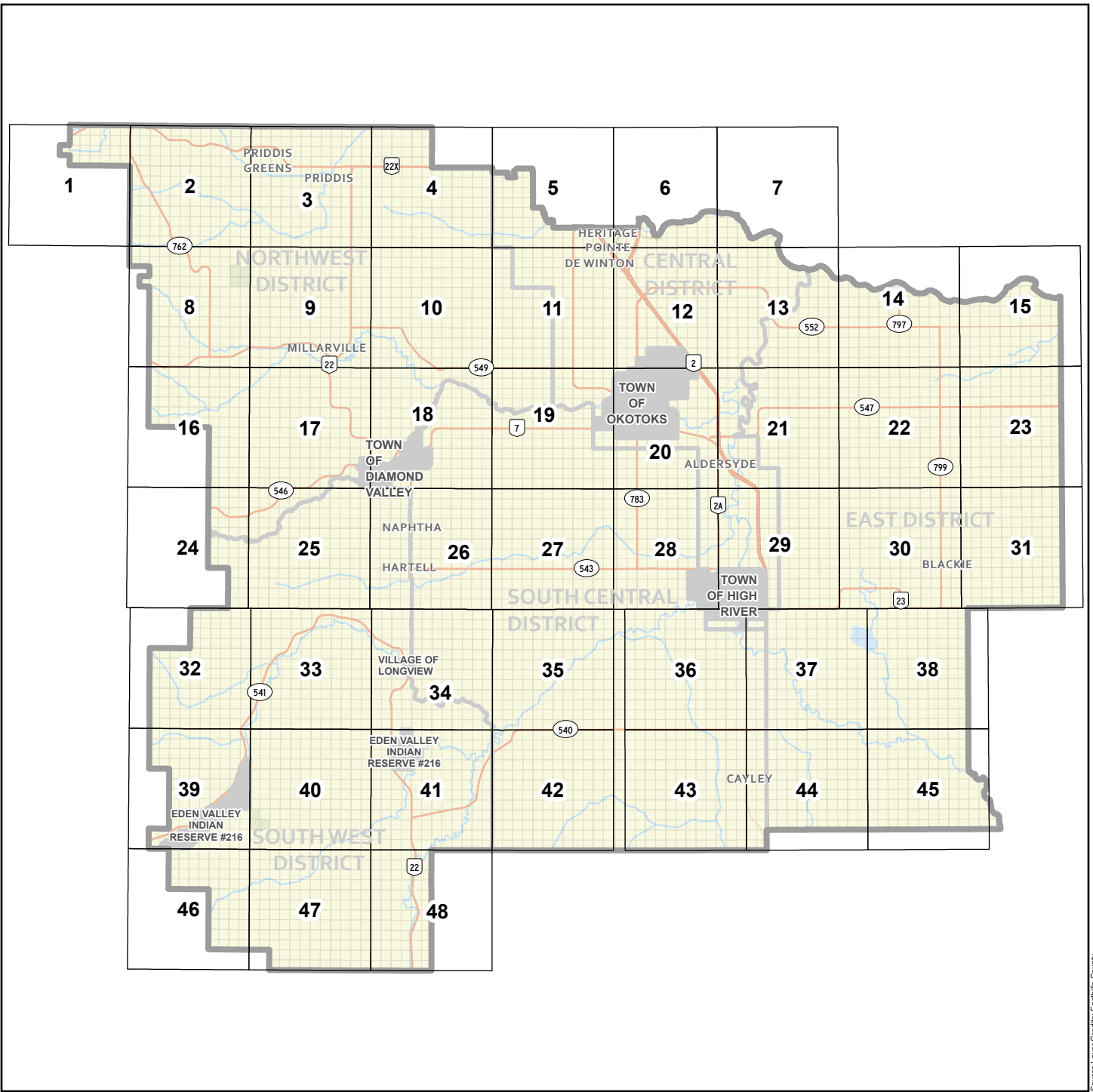
Year	Low	Baseline	High
	(unabsorbed gross non-residential acres remaining)		
2025	3,766	3,766	3,766
2026	3,686	3,686	3,676
2027	3,616	3,616	3,586
2028	3,546	3,546	3,496
2029	3,486	3,486	3,396
2030	3,436	3,436	3,296
2031	3,386	3,376	3,196
2032	3,346	3,316	3,096
2033	3,316	3,256	2,996
2034	3,296	3,196	2,886
2035	3,276	3,136	2,776
2036	3,266	3,066	2,666
2037	3,266	3,006	2,546
2038	3,266	2,946	2,426
2039	3,266	2,876	2,306
2040	3,266	2,806	2,176
2041	3,266	2,746	2,056
2042	3,266	2,676	1,926
2043	3,266	2,606	1,786
2044	3,266	2,536	1,646
2045	3,266	2,466	1,506






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<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1710015501&cubeTimeFrame.startYear=2016&cubeTimeFrame.endYear=2024&referencePeriods=20160101%2C20240101>
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Appendix A. Foothills County Land Supply Mapbook

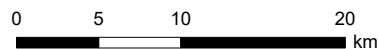


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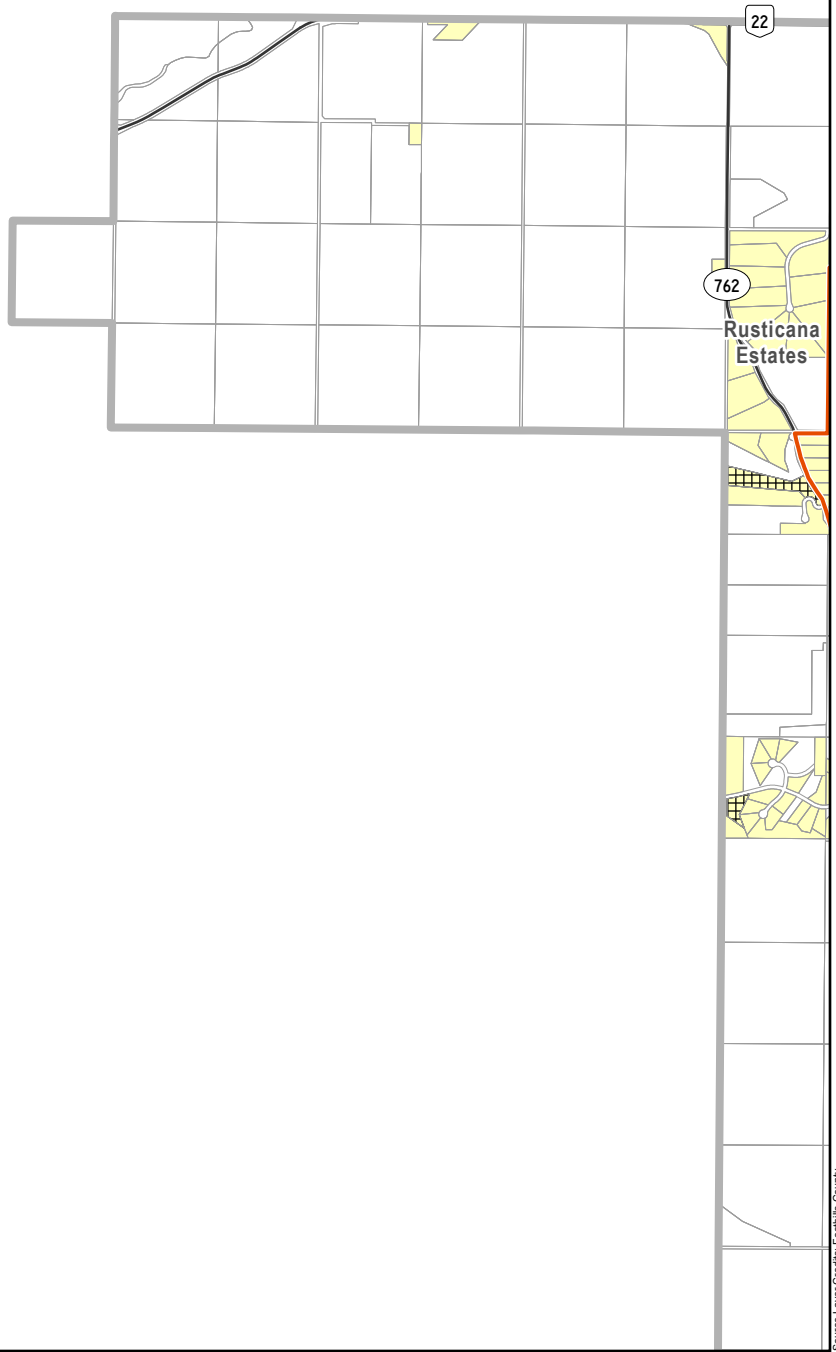
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
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-  Vacant Parcel
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-  Agricultural
-  Residential Country



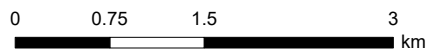
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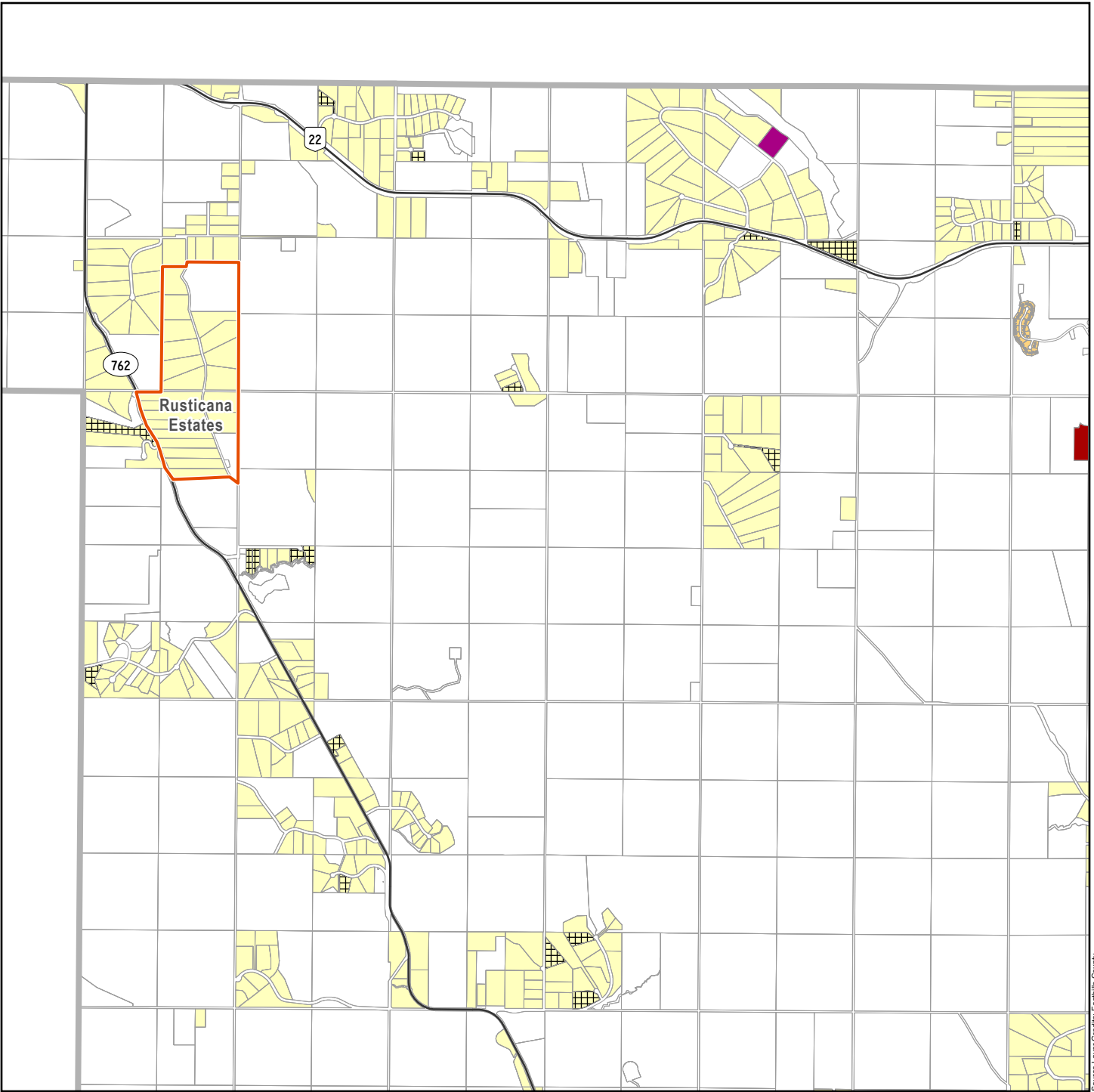











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-  Industrial Natural Resource Extraction



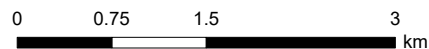
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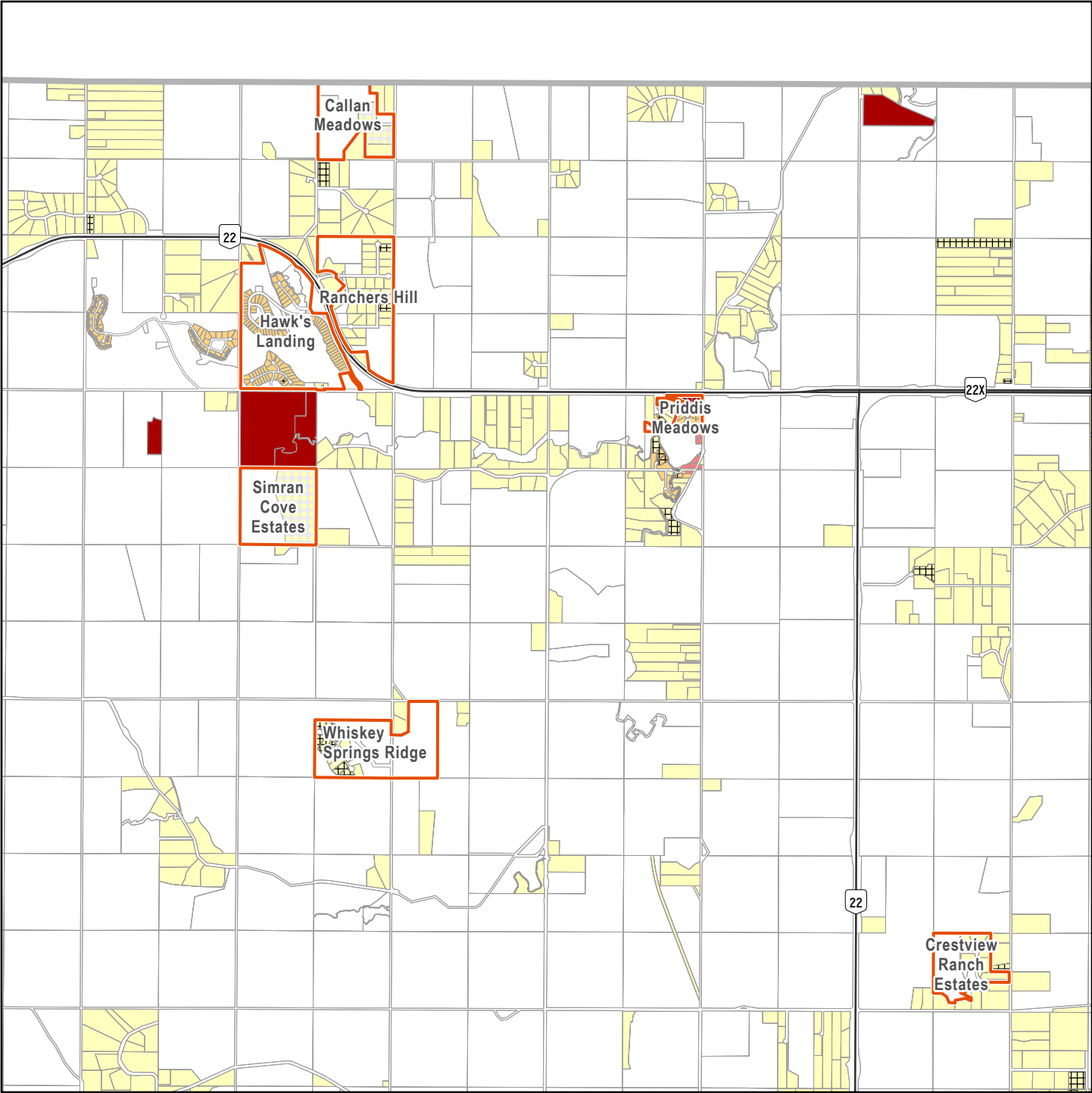
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





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-  Commercial Community
-  Commercial Direct Control

Absorbed Land

-  Agricultural
-  Residential Country

Unabsorbed Land

-  Residential Country



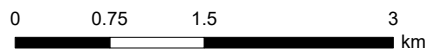
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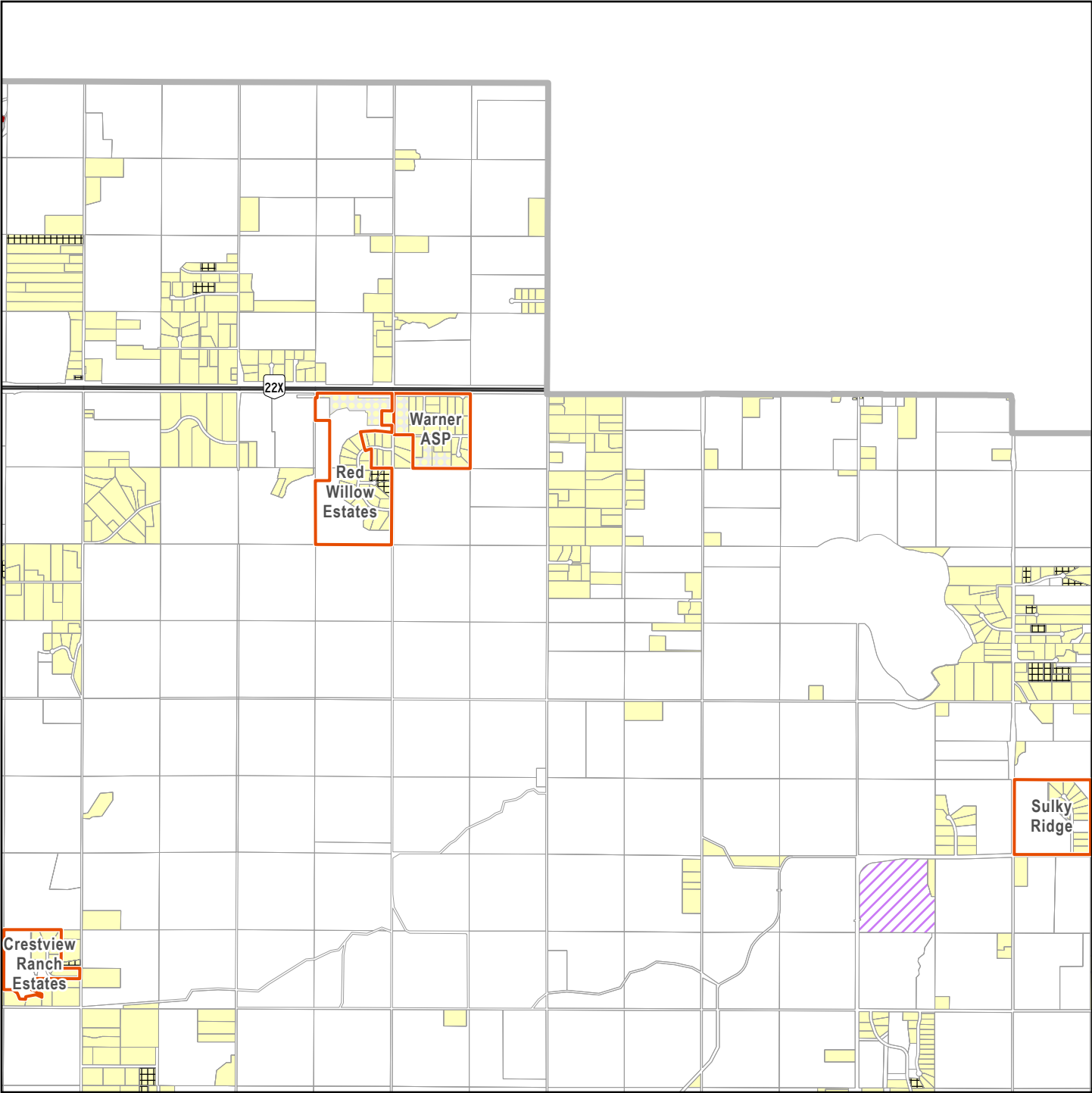
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




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|---|--------------------|---|---------------------------|
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|  | Approved Plan |  | Residential Country |
|  | Parcel |  | Commercial Direct Control |
|  | Vacant Parcel | Unabsorbed Land | |
| Absorbed Land | |  | Residential Country |
|  | Agricultural | | |



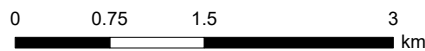
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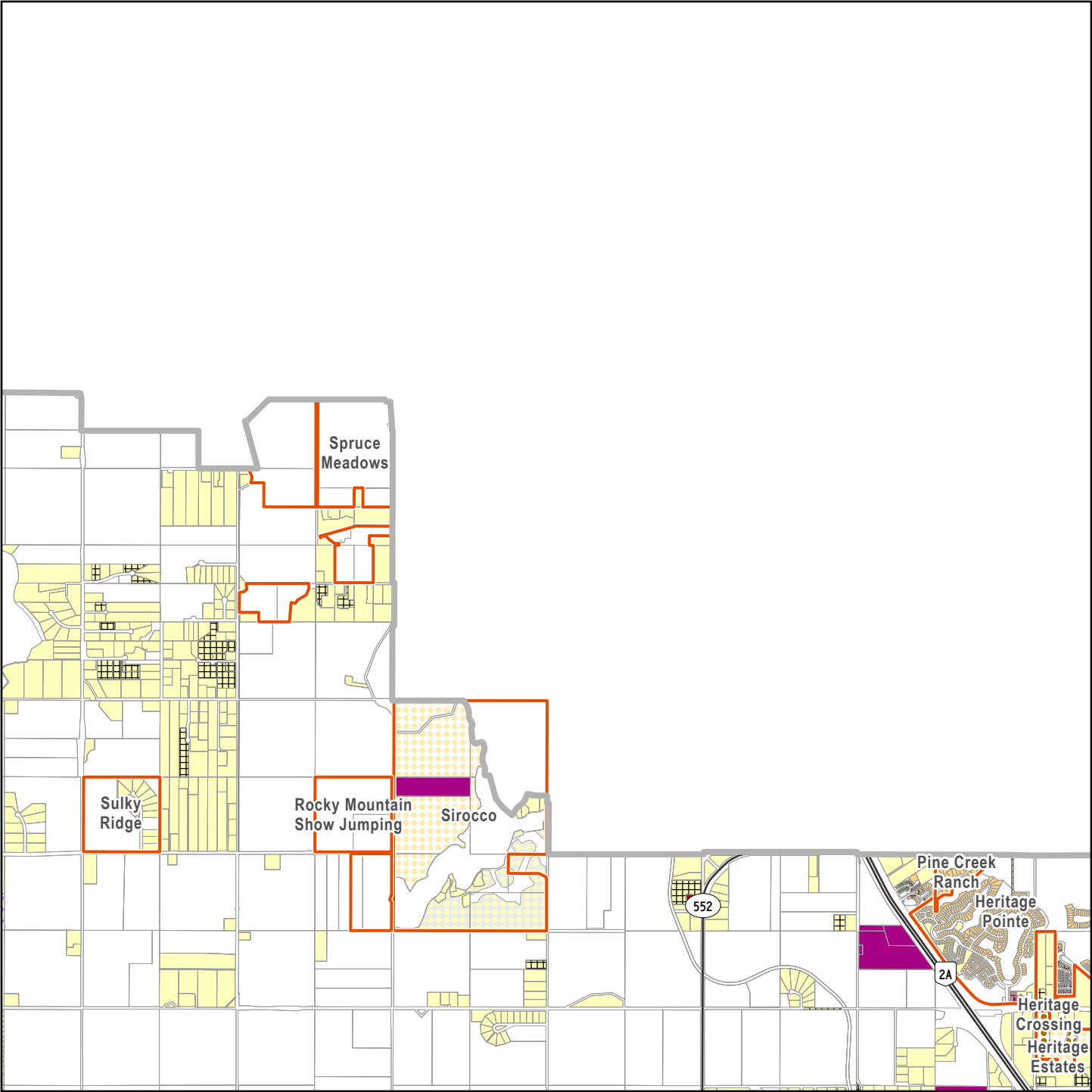
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|----------------------|---------------------------|--|
| Municipal Boundary | Agricultural Business | Industrial Natural Resource Extraction |
| Approved Plan | Residential Country | Unabsorbed Land |
| Parcel | Residential Community | Residential Country |
| Vacant Parcel | Residential Multi | Residential Community |
| Absorbed Land | Commercial Direct Control | Residential Multi |
| Agricultural | | |



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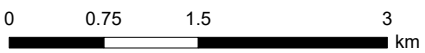
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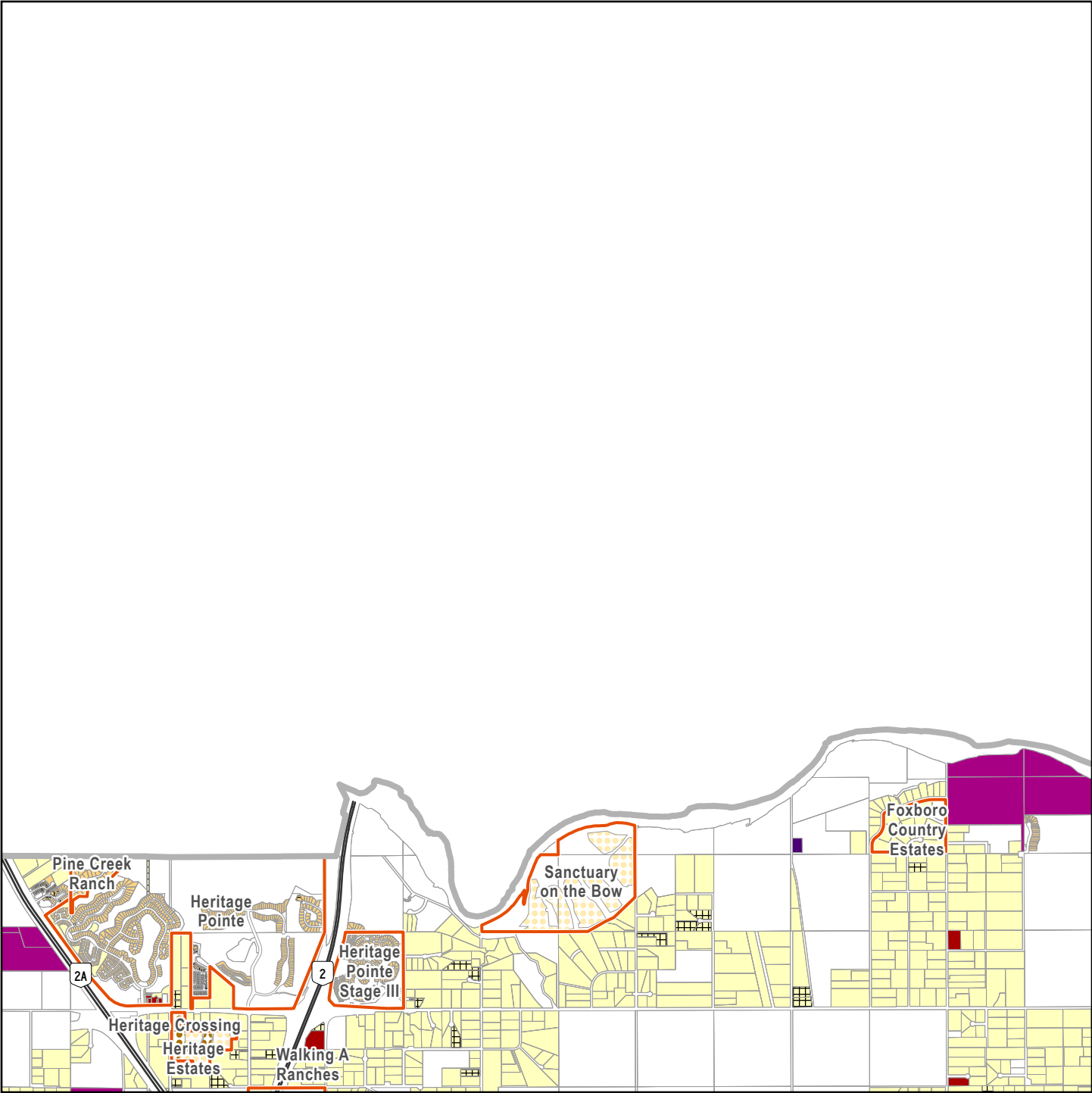


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| Municipal Boundary | Residential Multi |
| Approved Plan | Commercial Direct Control |
| Parcel | Industrial Natural Resource Extraction |
| Vacant Parcel | Industrial Direct Control |
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| Agricultural | Residential Community |
| Residential Country | Residential Multi |
| Residential Community | |



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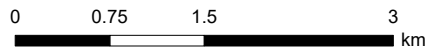
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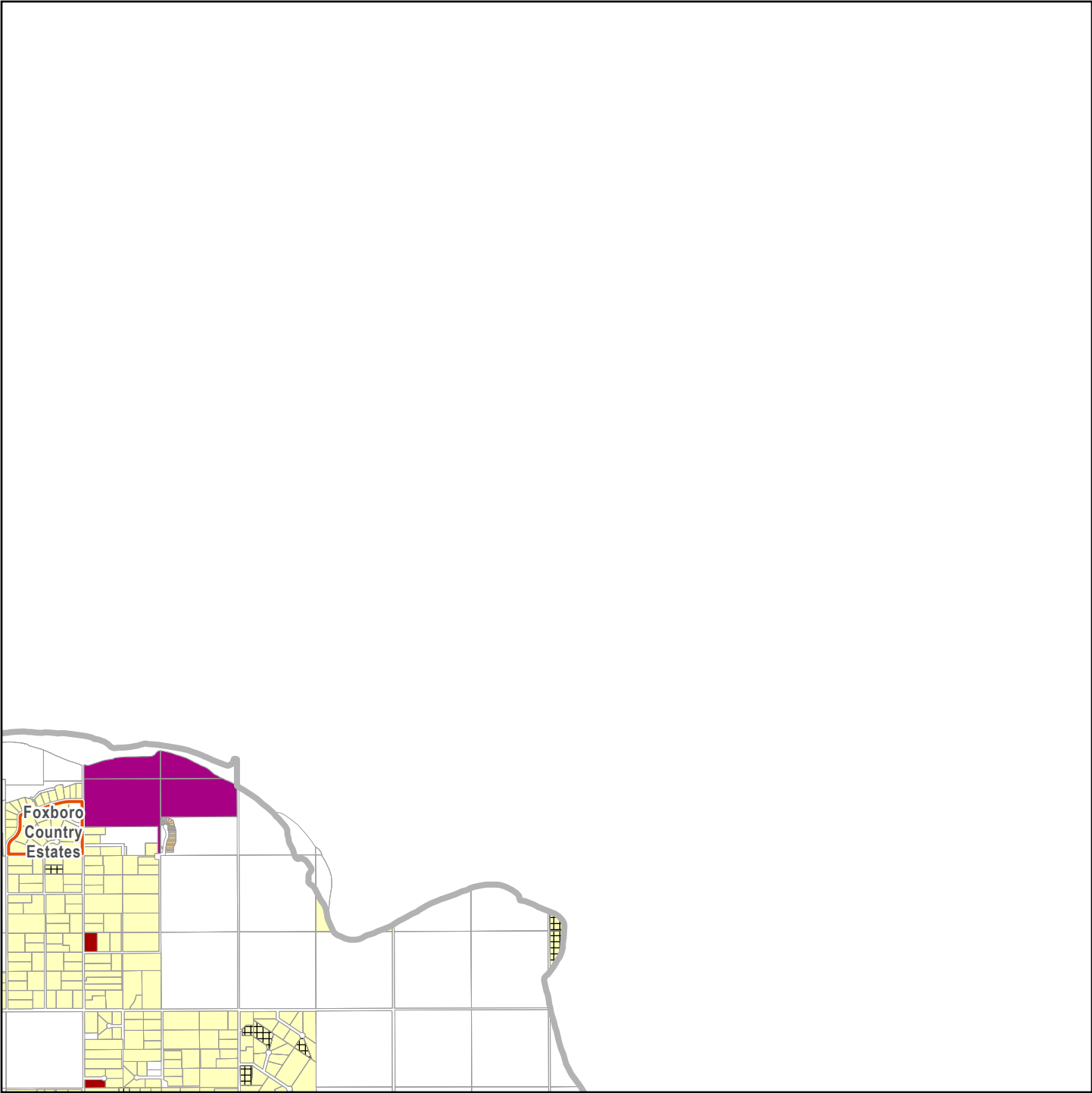


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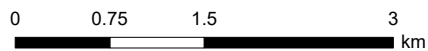
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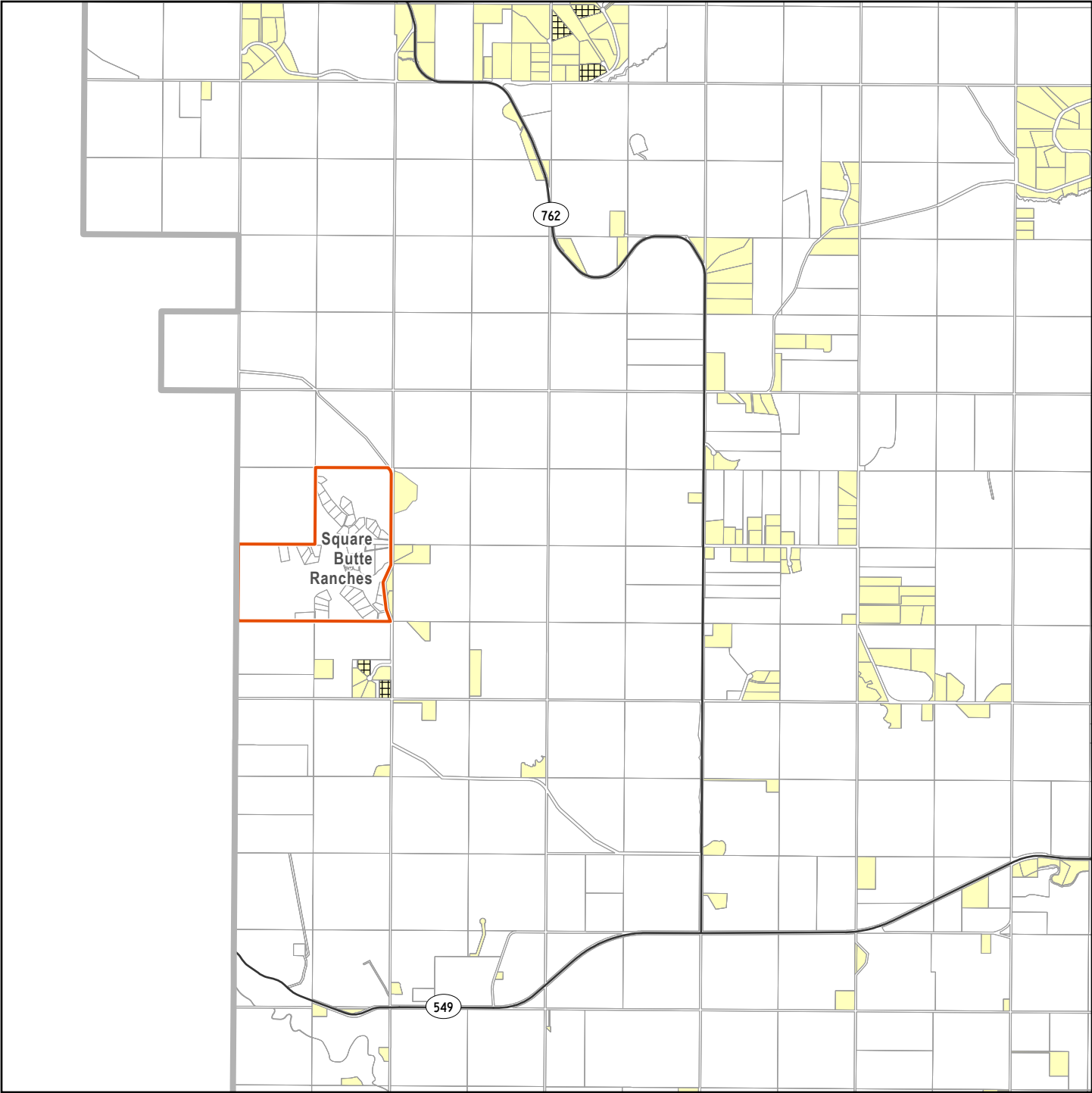
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
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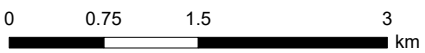
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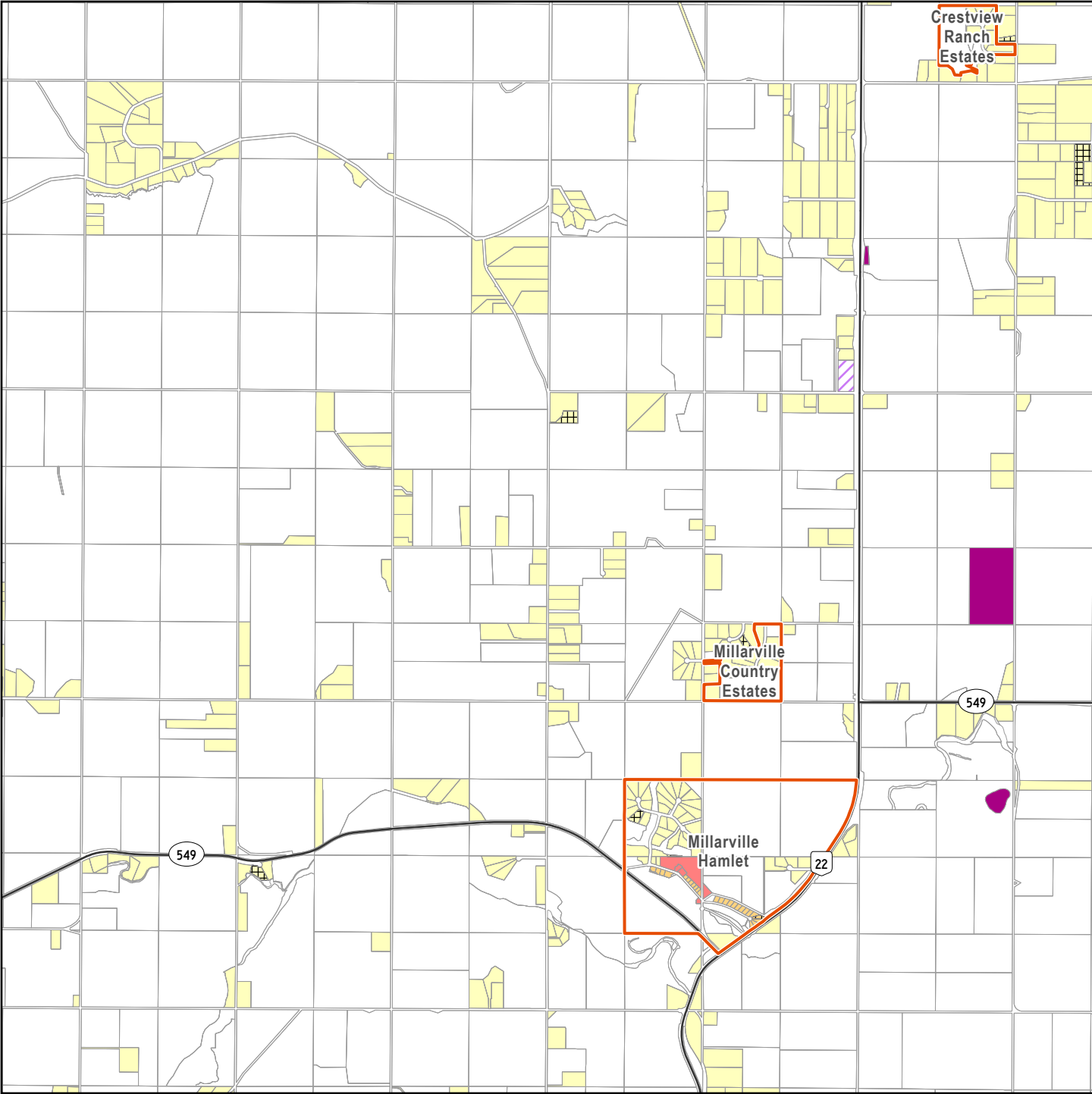
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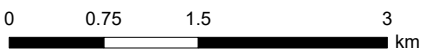


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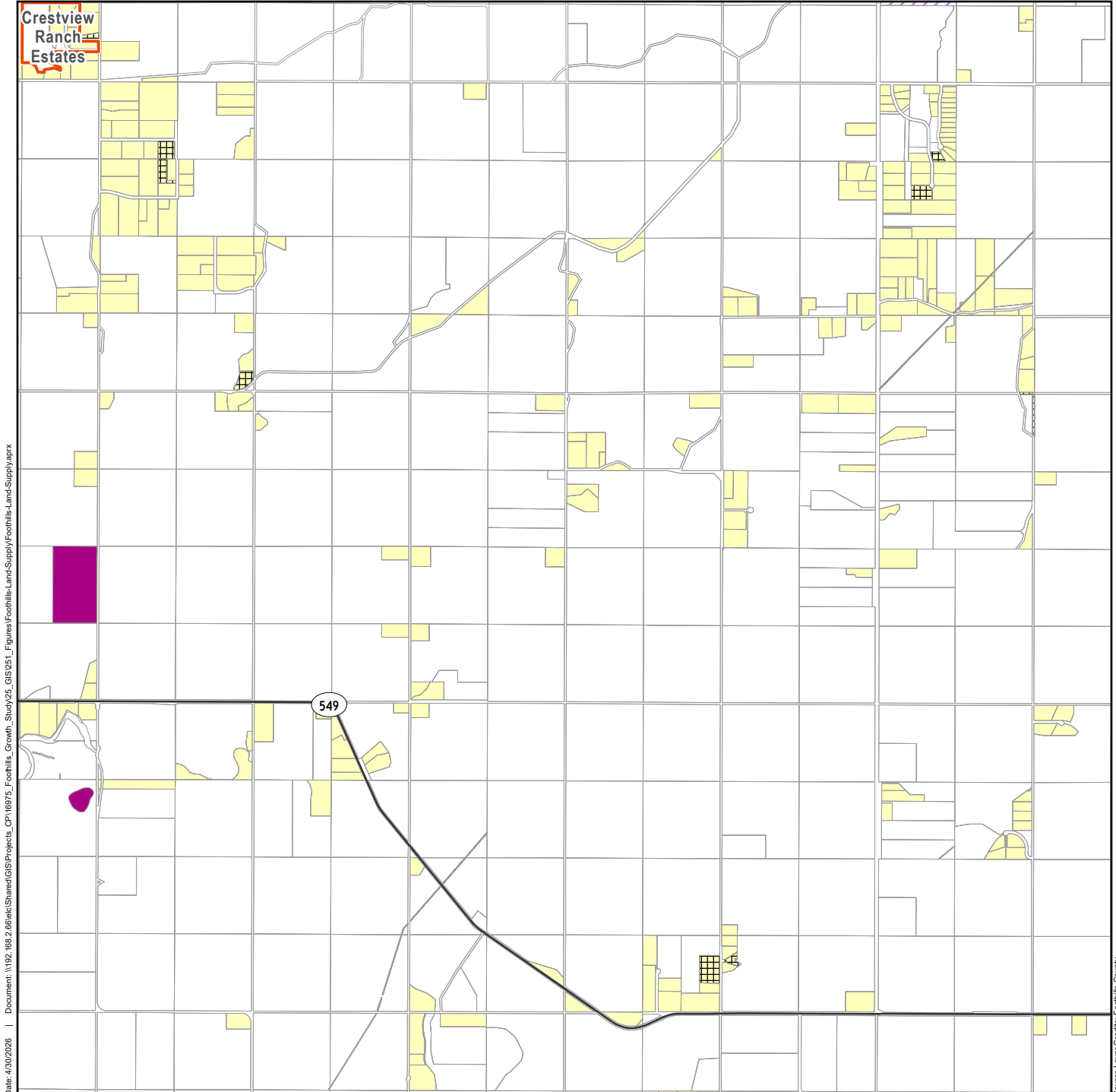
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 - Residential Country
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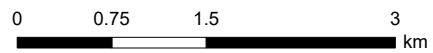
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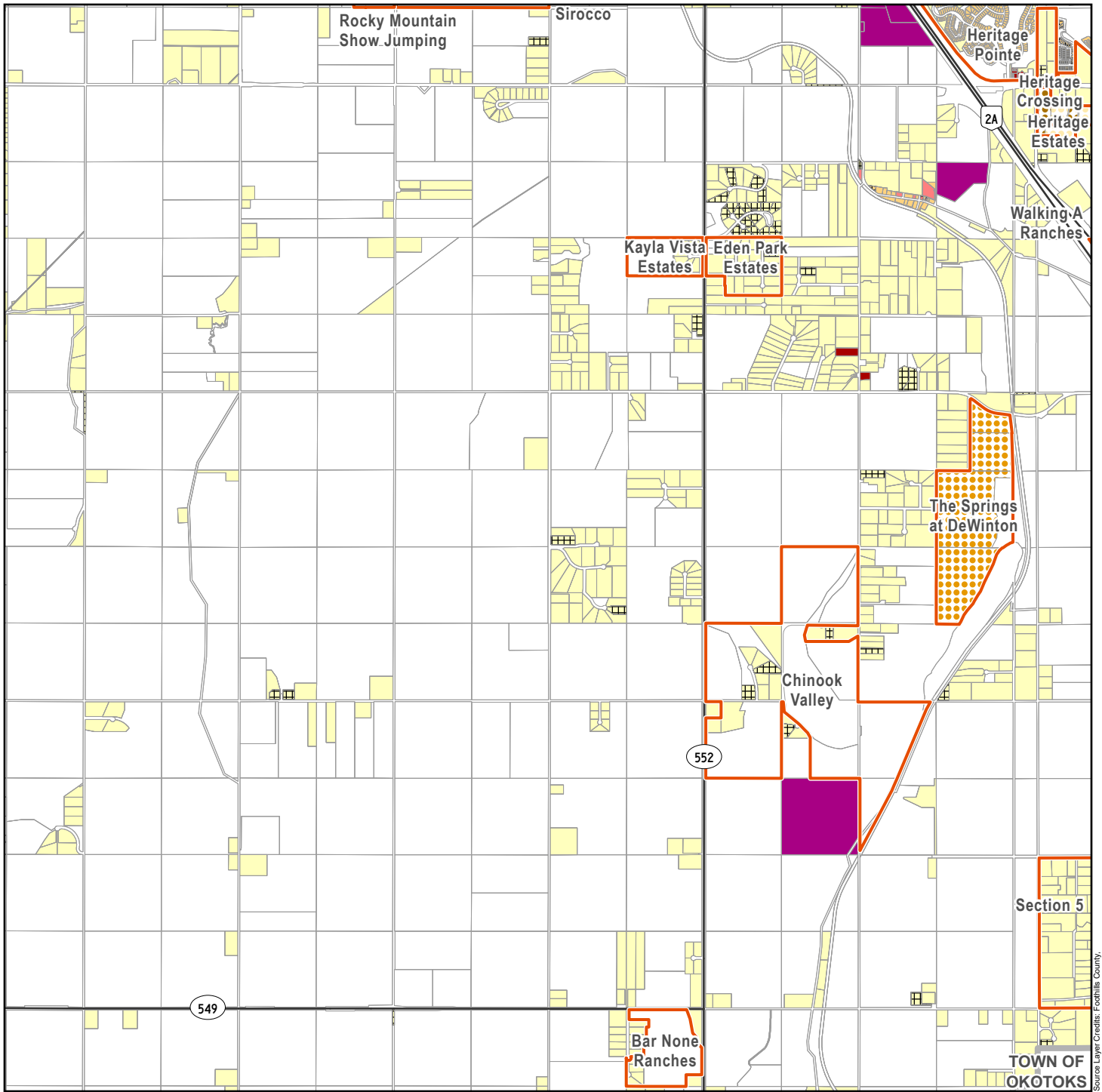


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| | Parcel | | Residential Multi |
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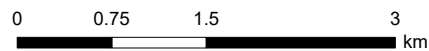
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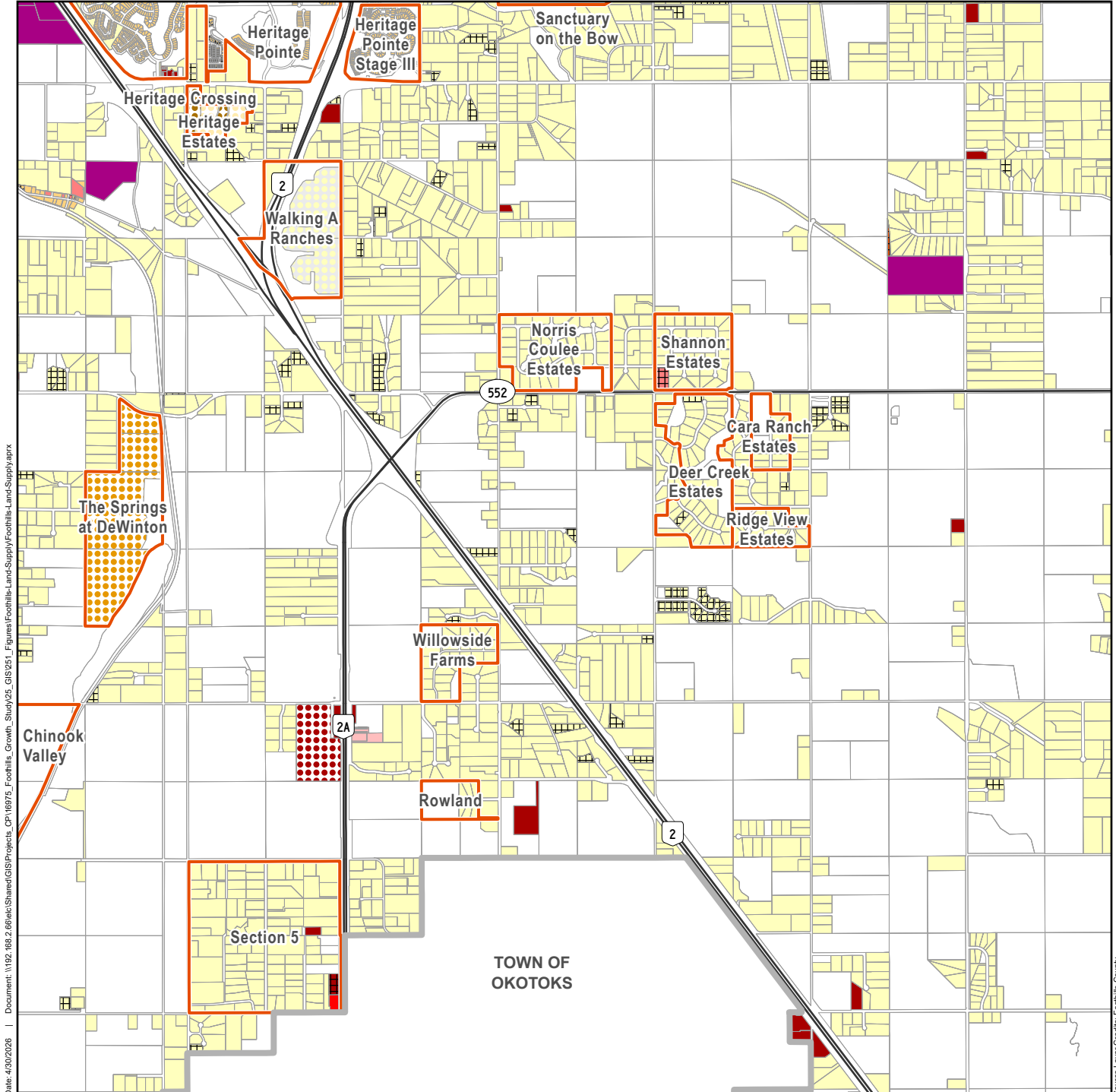
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| Parcel | Commercial Community | Residential Cluster |
| Vacant Parcel | Commercial Highway | Residential Community |
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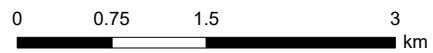
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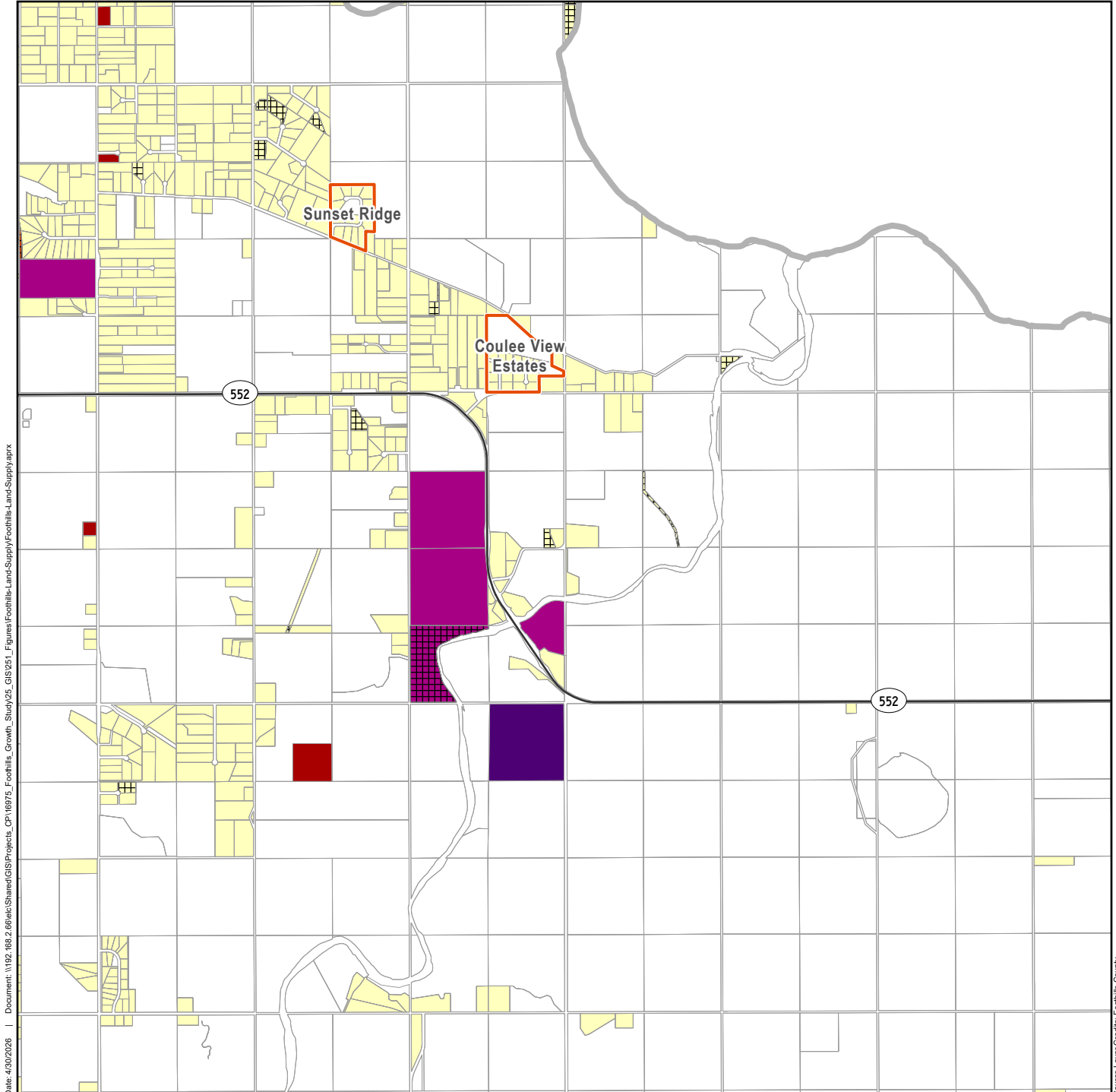
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








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-  Industrial Natural Resource Extraction
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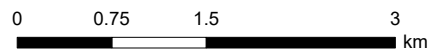
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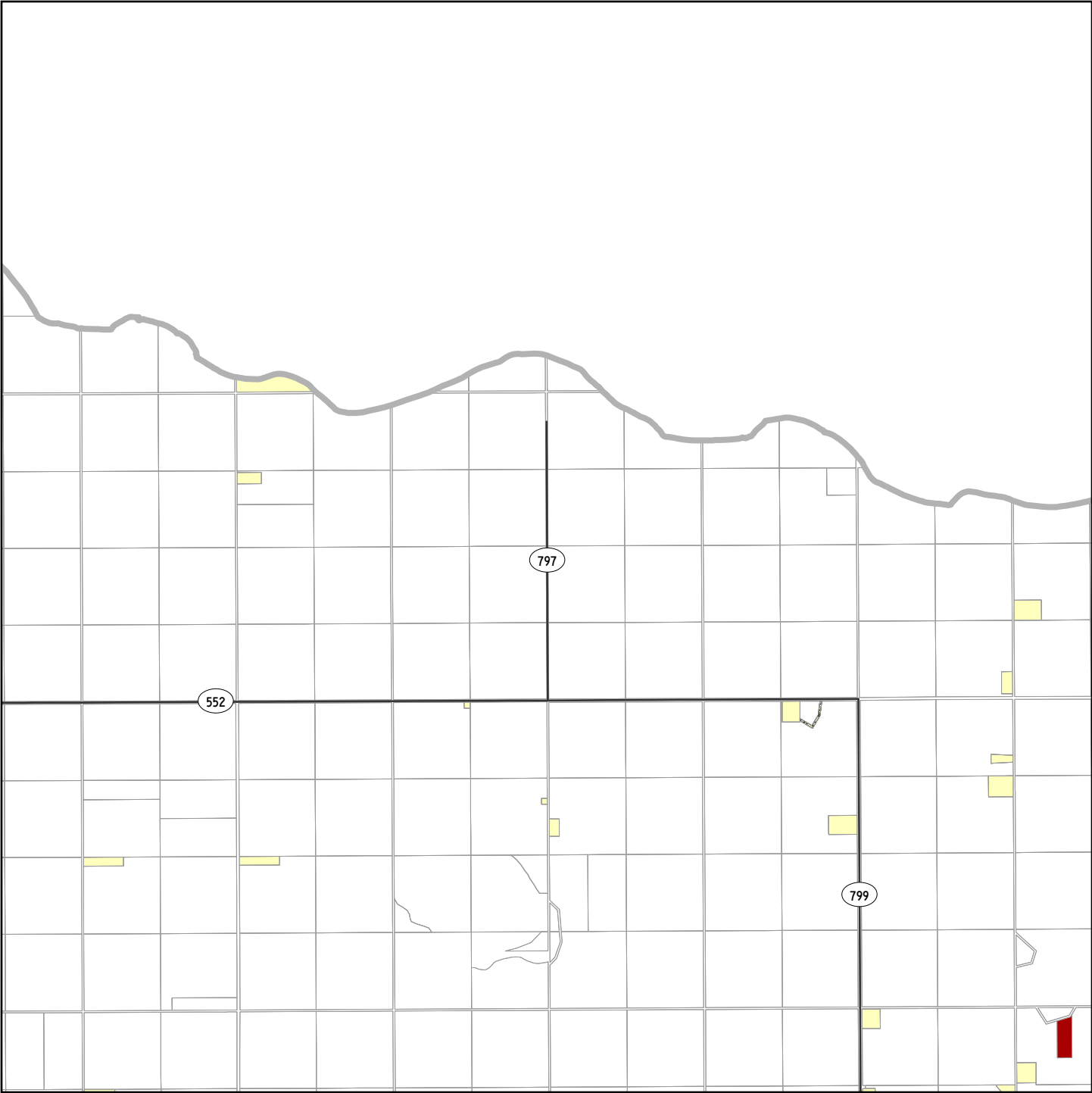
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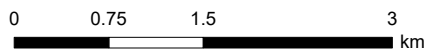
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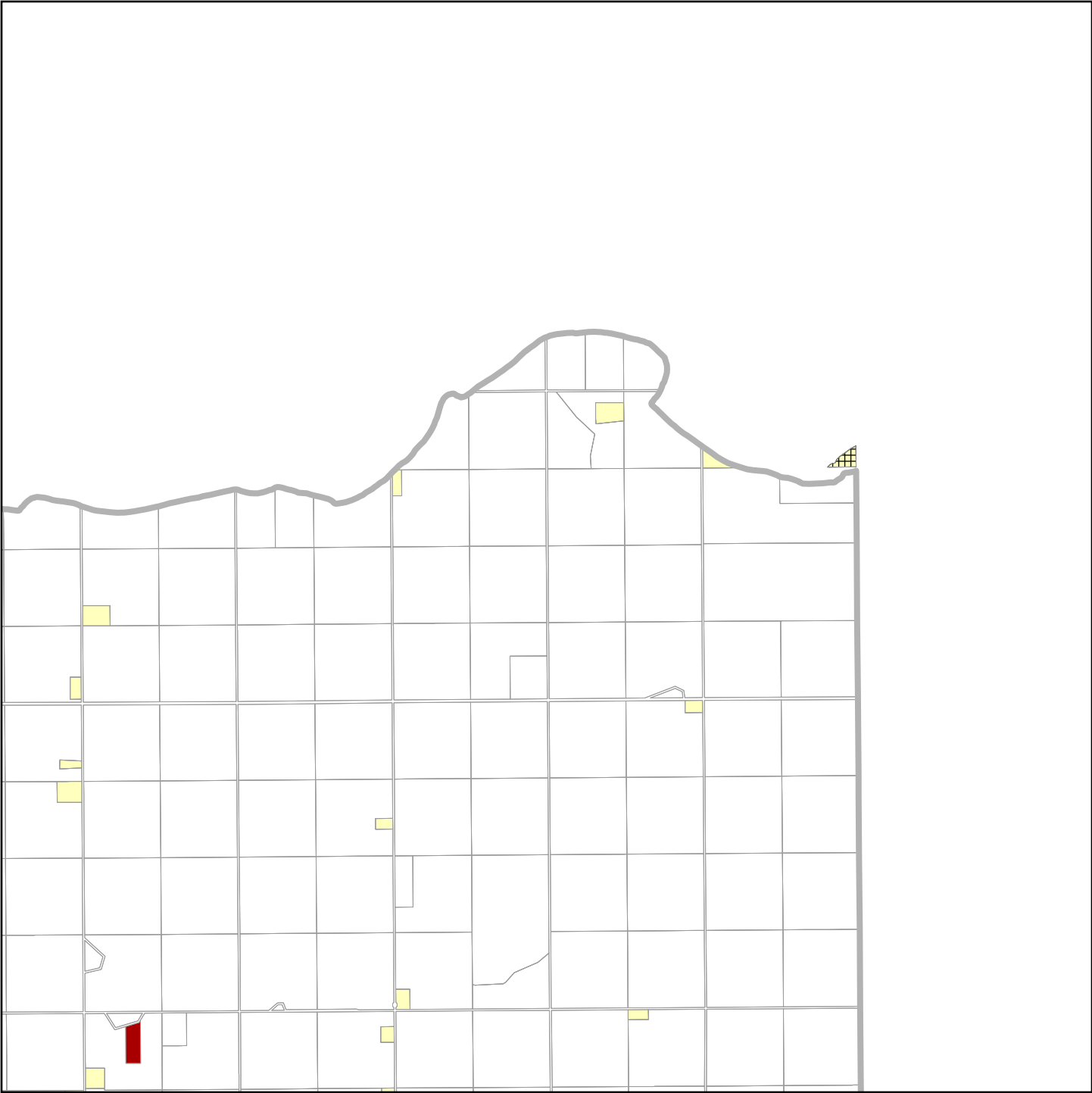
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





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 -  Residential Country
 -  Commercial Direct Control



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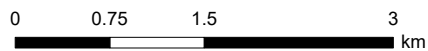
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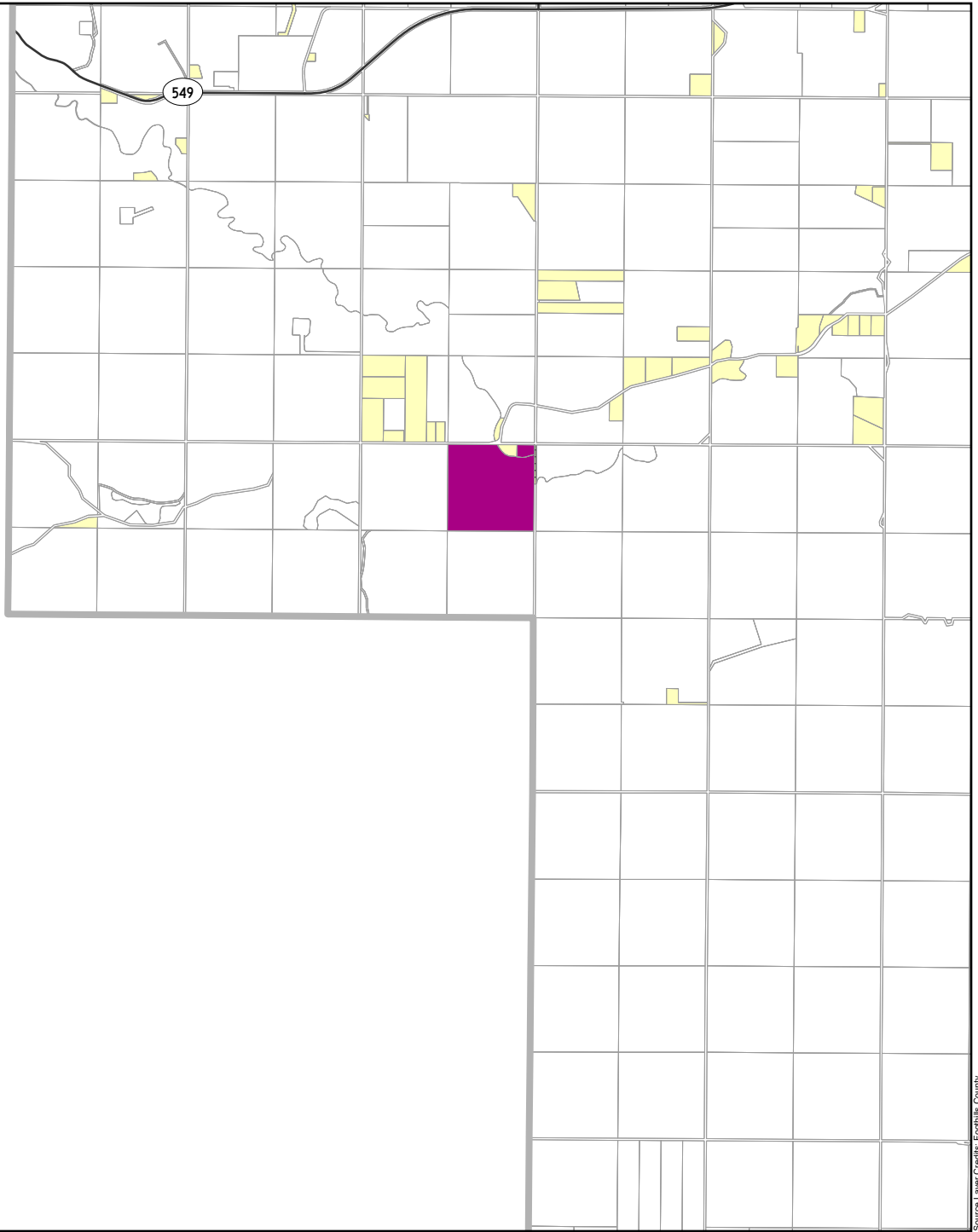
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

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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

Absorbed Land

-  Agricultural
-  Residential Country
-  Industrial Natural Resource Extraction



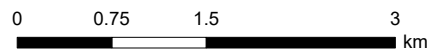
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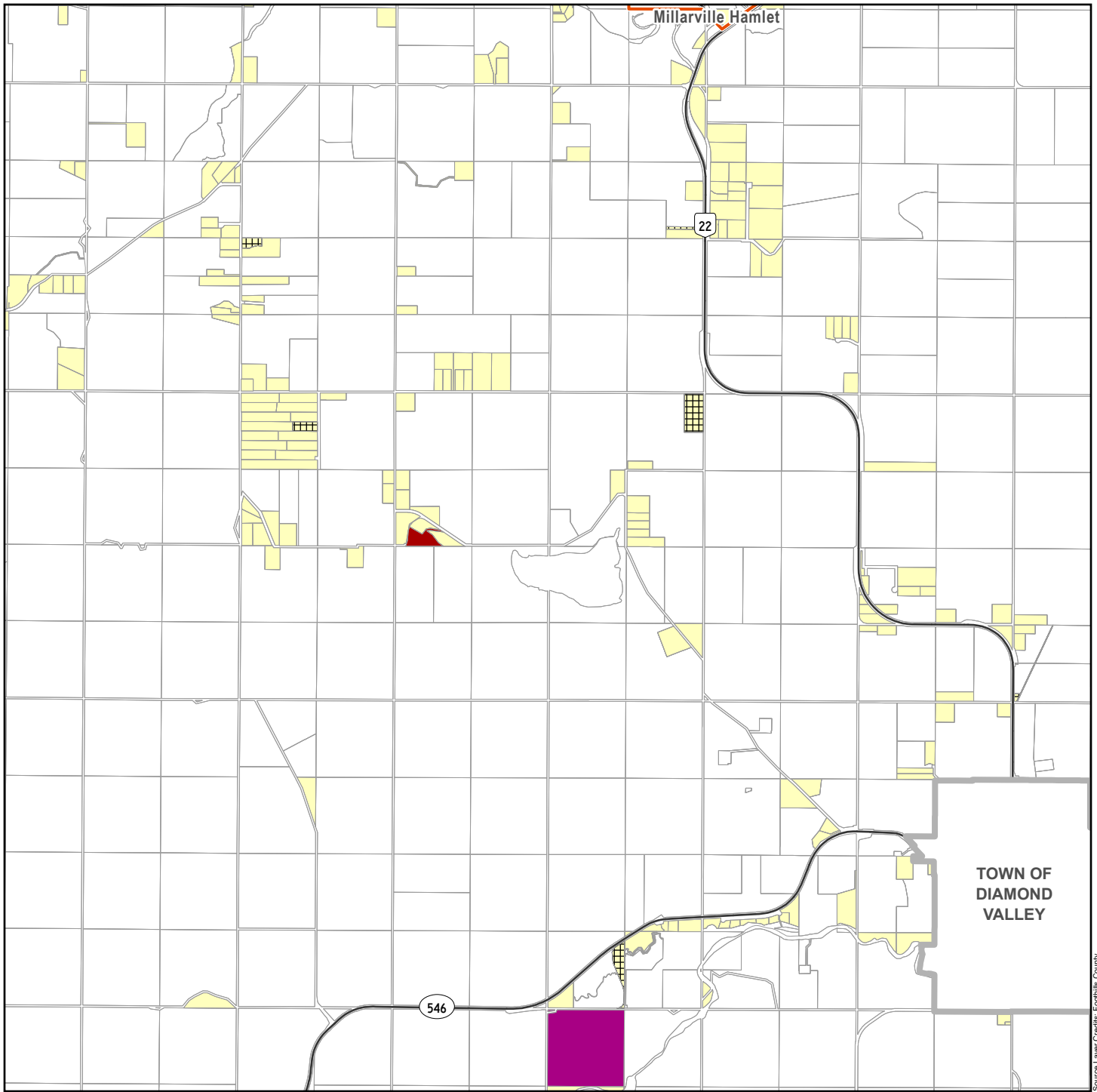
APPENDIX A:
LAND SUPPLY
ANALYSIS









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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country
-  Residential Community
-  Commercial Direct Control
-  Industrial Natural Resource Extraction



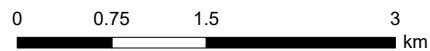
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APPENDIX A:
LAND SUPPLY
ANALYSIS

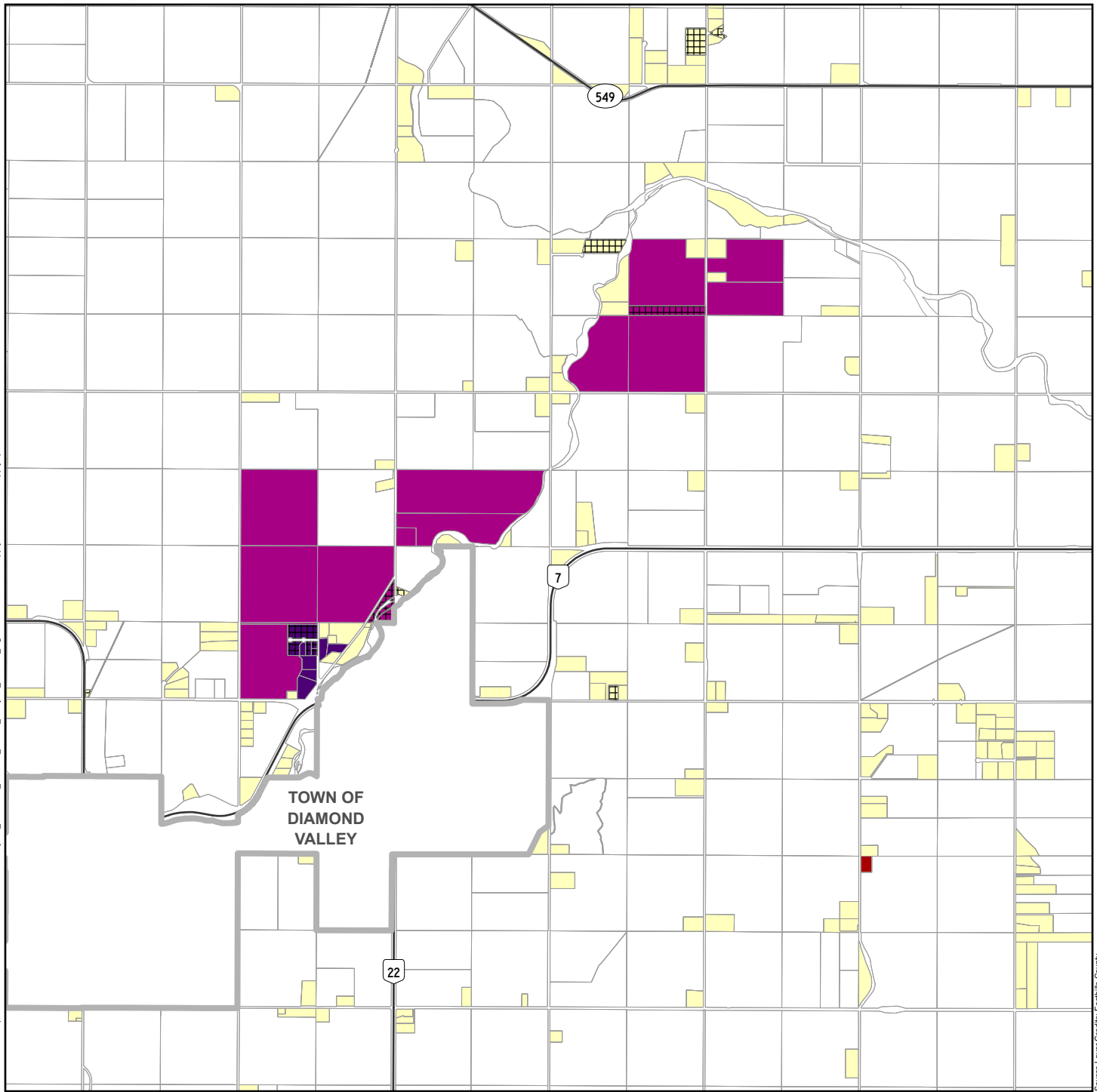
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Source Layer Credits: Foothills County.



- Municipal Boundary
- Approved Plan
- Parcel
- Vacant Parcel
- Absorbed Land**
- Agricultural

- Residential Country
- Commercial Direct Control
- Industrial Natural Resource Extraction
- Industrial Direct Control



**TECHNICAL
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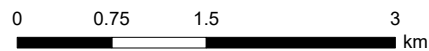
**APPENDIX A:
LAND SUPPLY
ANALYSIS**

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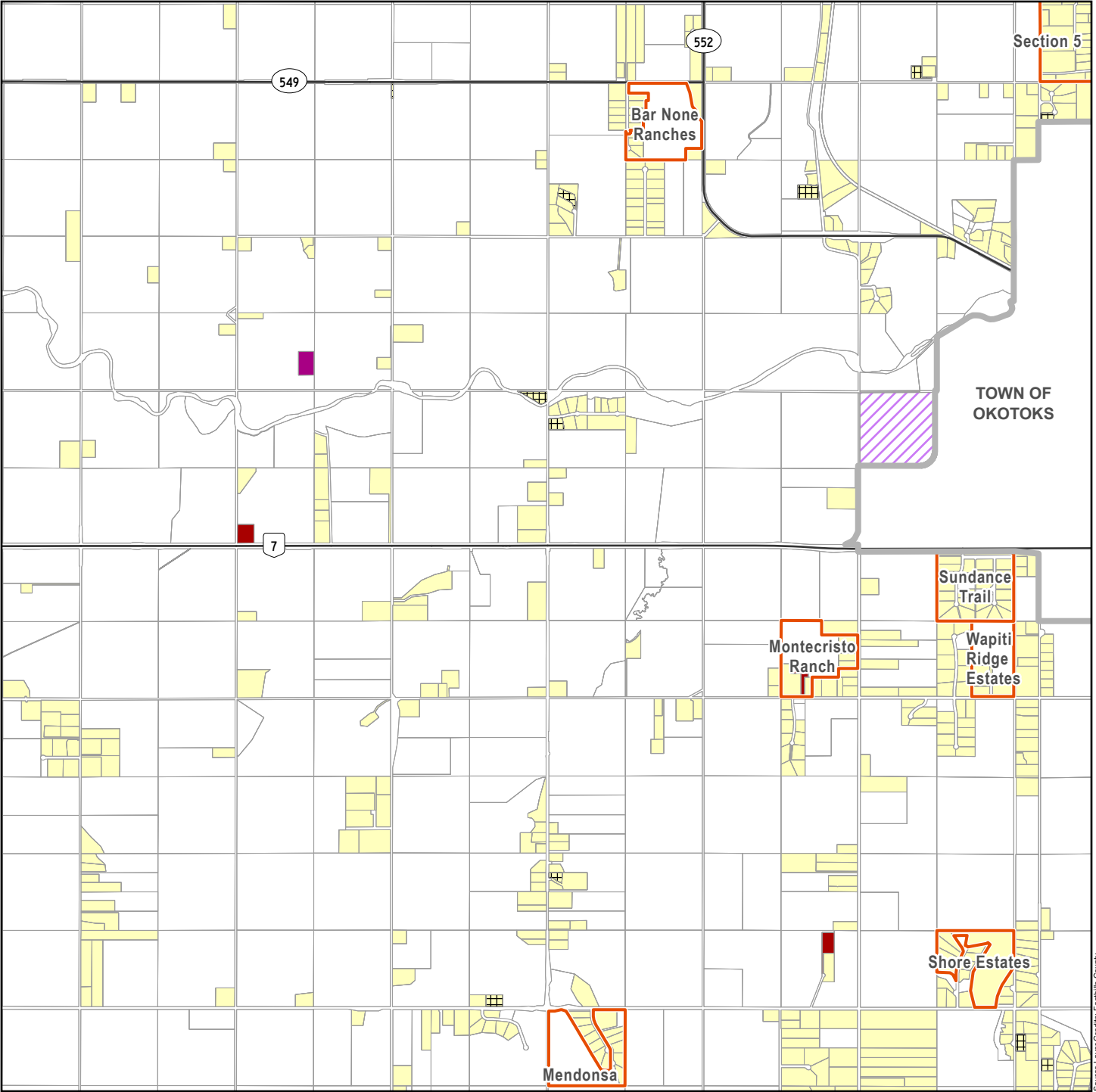


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Source Layer Credits: Foothills County



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
-  Agricultural Business
-  Residential Country
-  Commercial Direct Control
-  Industrial Natural Resource Extraction
- Absorbed Land**
-  Agricultural



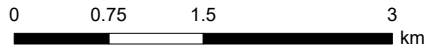
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**APPENDIX A:
LAND SUPPLY
ANALYSIS**

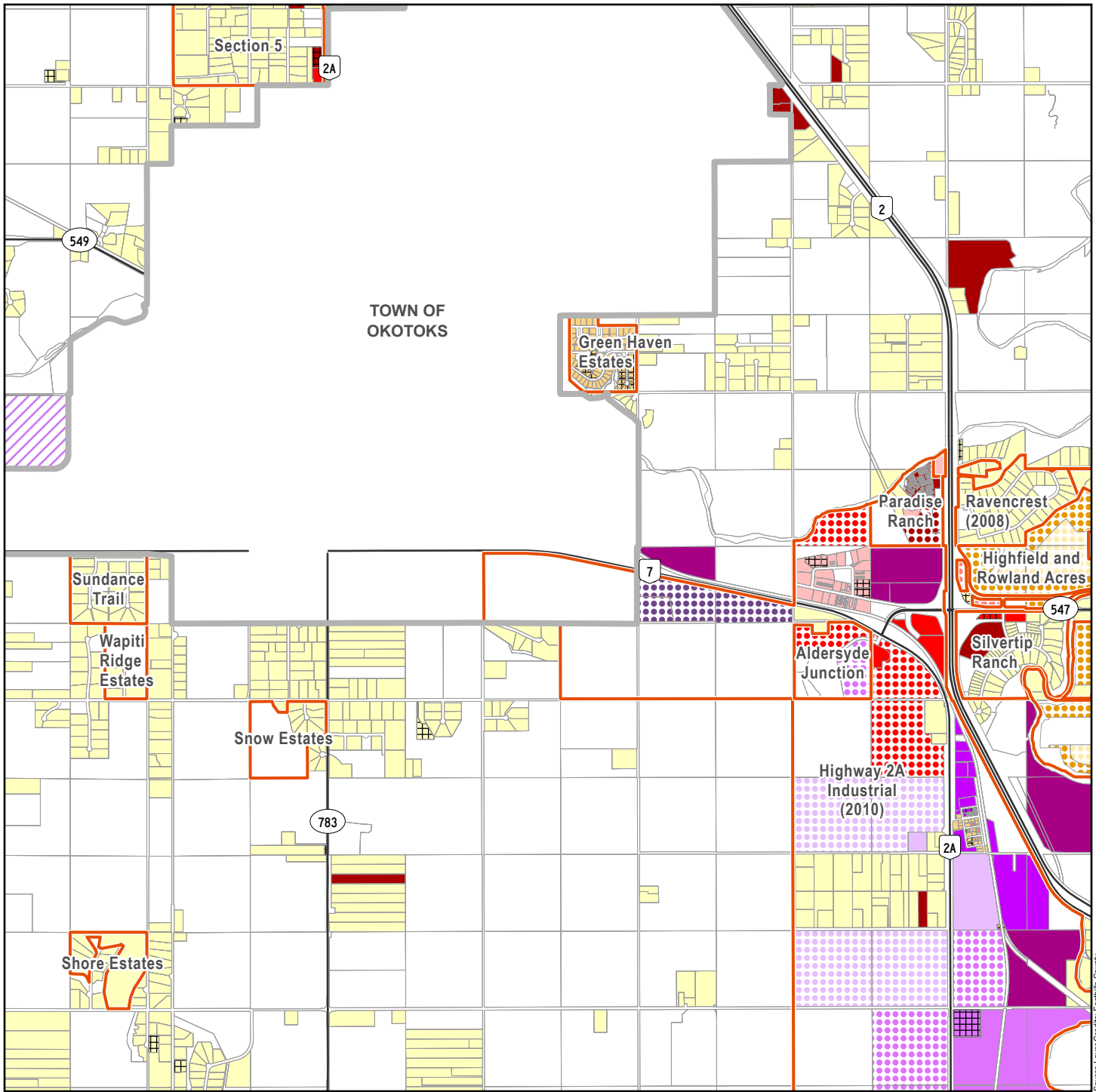
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Source Layer Credits: Foothills County



— Municipal Boundary

— Approved Plan

□ Parcel

▣ Vacant Parcel

Absorbed Land

□ Agricultural

▨ Agricultural Business

□ Residential Country

□ Residential Community

□ Commercial Business Park

□ Commercial Community

□ Commercial Highway

□ Commercial Direct Control

□ Industrial Edge

□ Industrial General

□ Industrial Hamlet

□ Industrial Natural Resource Extraction

Unabsorbed Land

▣ Residential Cluster

▣ Residential Community

▣ Gateway Interface

▣ Commercial Community

▣ Commercial Highway

▣ Commercial Direct Control

▣ Industrial Edge

▣ Industrial General



**TECHNICAL
GROWTH STUDY**

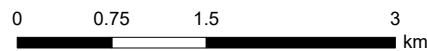
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ANALYSIS**

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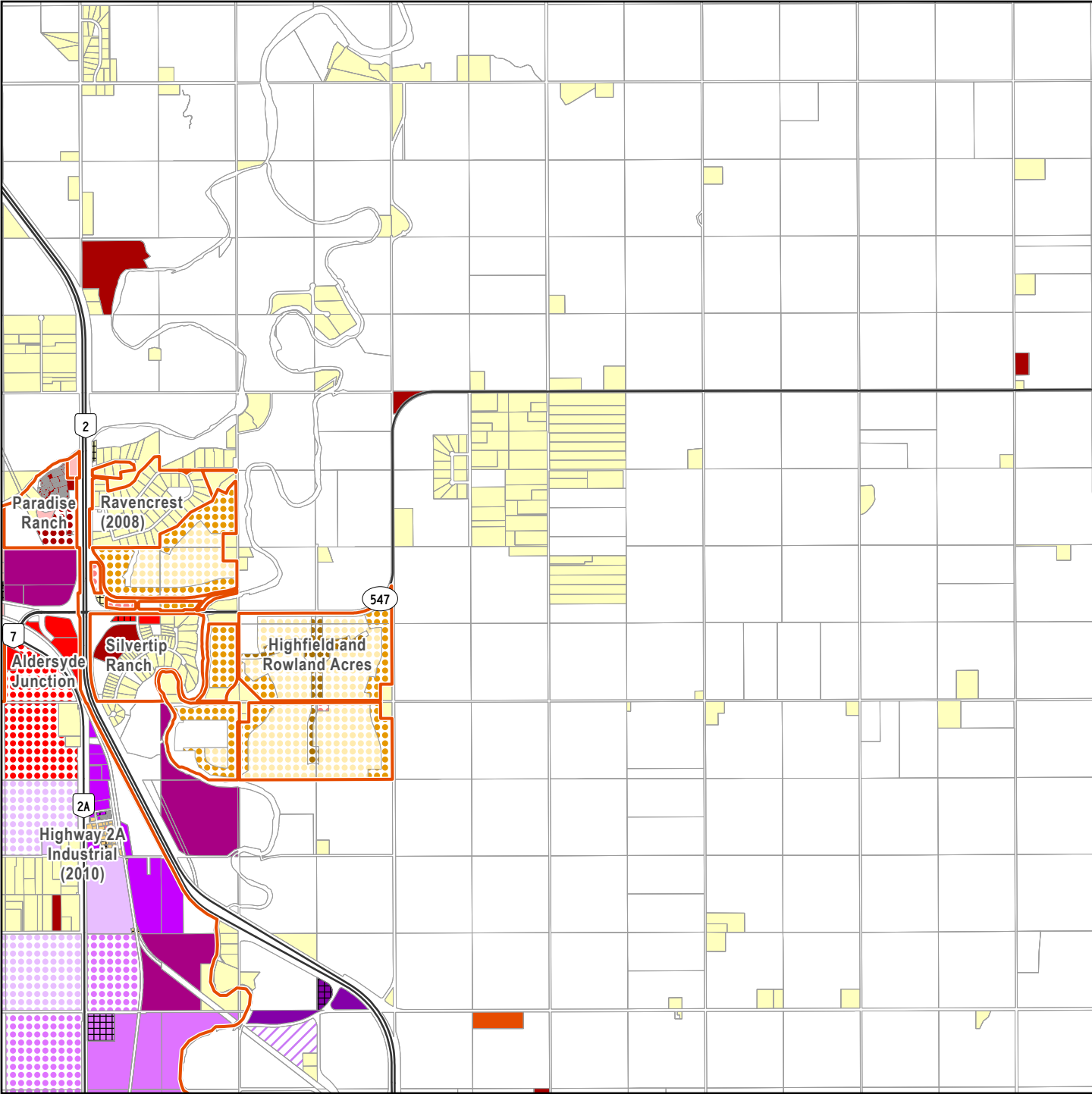


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Source Layer Credits: Foothills County



- Municipal Boundary
- Approved Plan
- Parcel
- Vacant Parcel
- Absorbed Land**
- Agricultural
- Agricultural Business
- Residential Country
- Residential Community
- Commercial Business Park

- Commercial Community
- Commercial Highway
- Commercial Rural Business
- Commercial Direct Control
- Industrial Edge
- Industrial General
- Industrial Hamlet
- Industrial Low Intensity
- Industrial Natural Resource Extraction

- Unabsorbed Land**
- Residential Cluster
- Residential Community
- Residential Multi
- Commercial Community
- Commercial Highway
- Commercial Direct Control
- Industrial Edge
- Industrial General



**TECHNICAL
GROWTH STUDY**

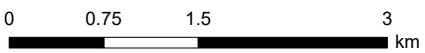
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LAND SUPPLY
ANALYSIS**

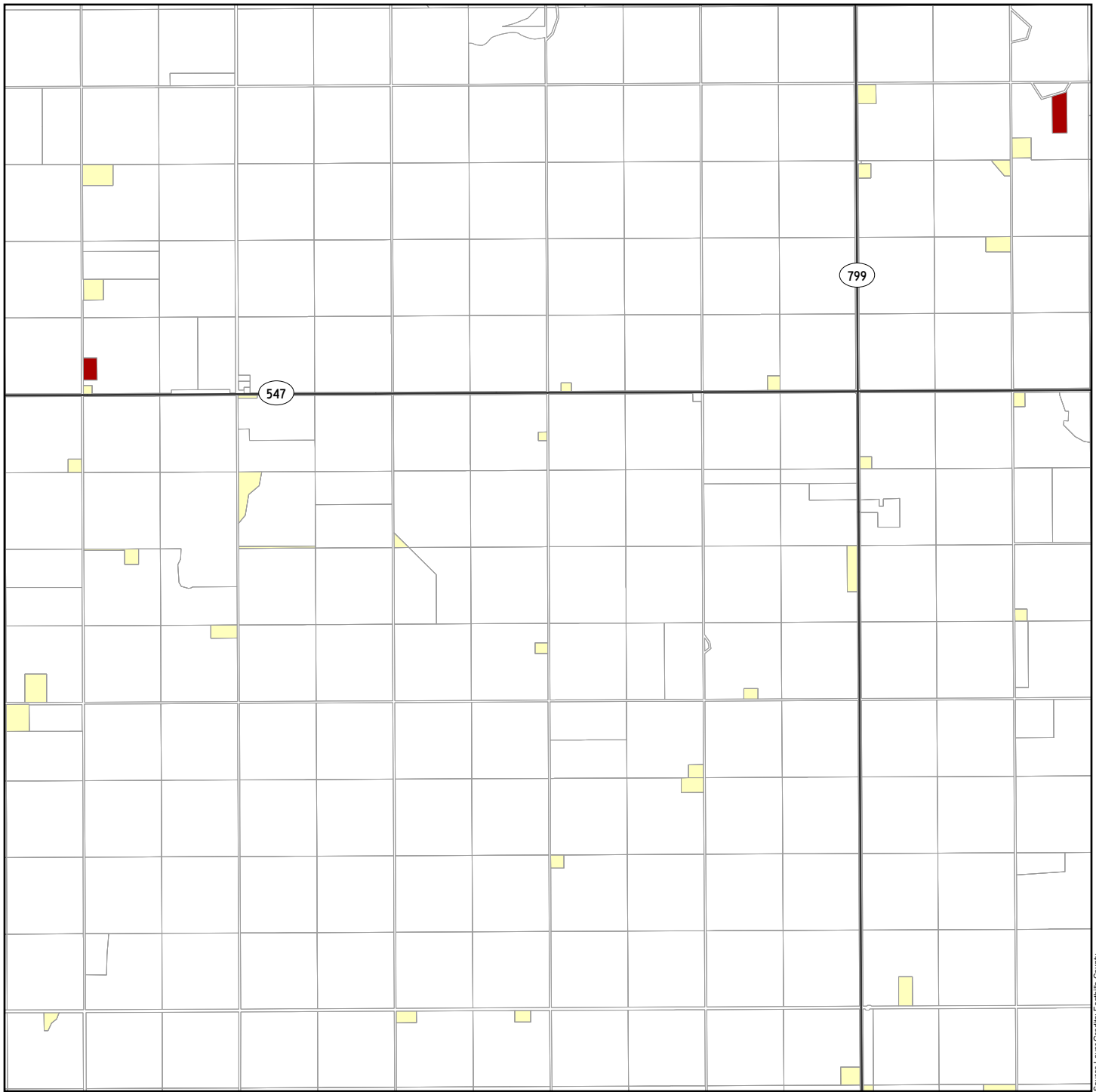
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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Commercial Direct Control



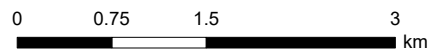
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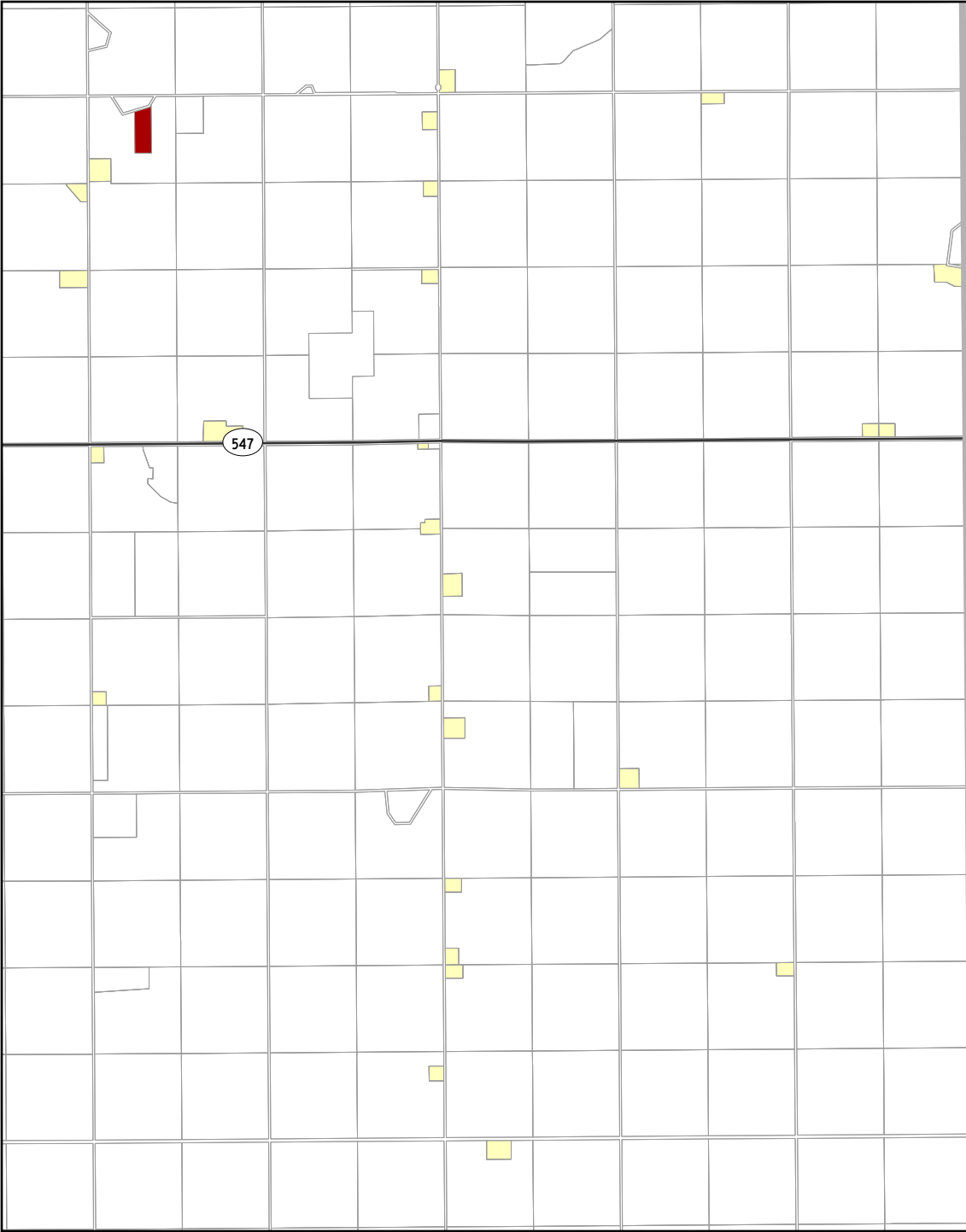
**APPENDIX A:
LAND SUPPLY
ANALYSIS**





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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Commercial Direct Control



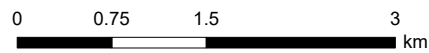
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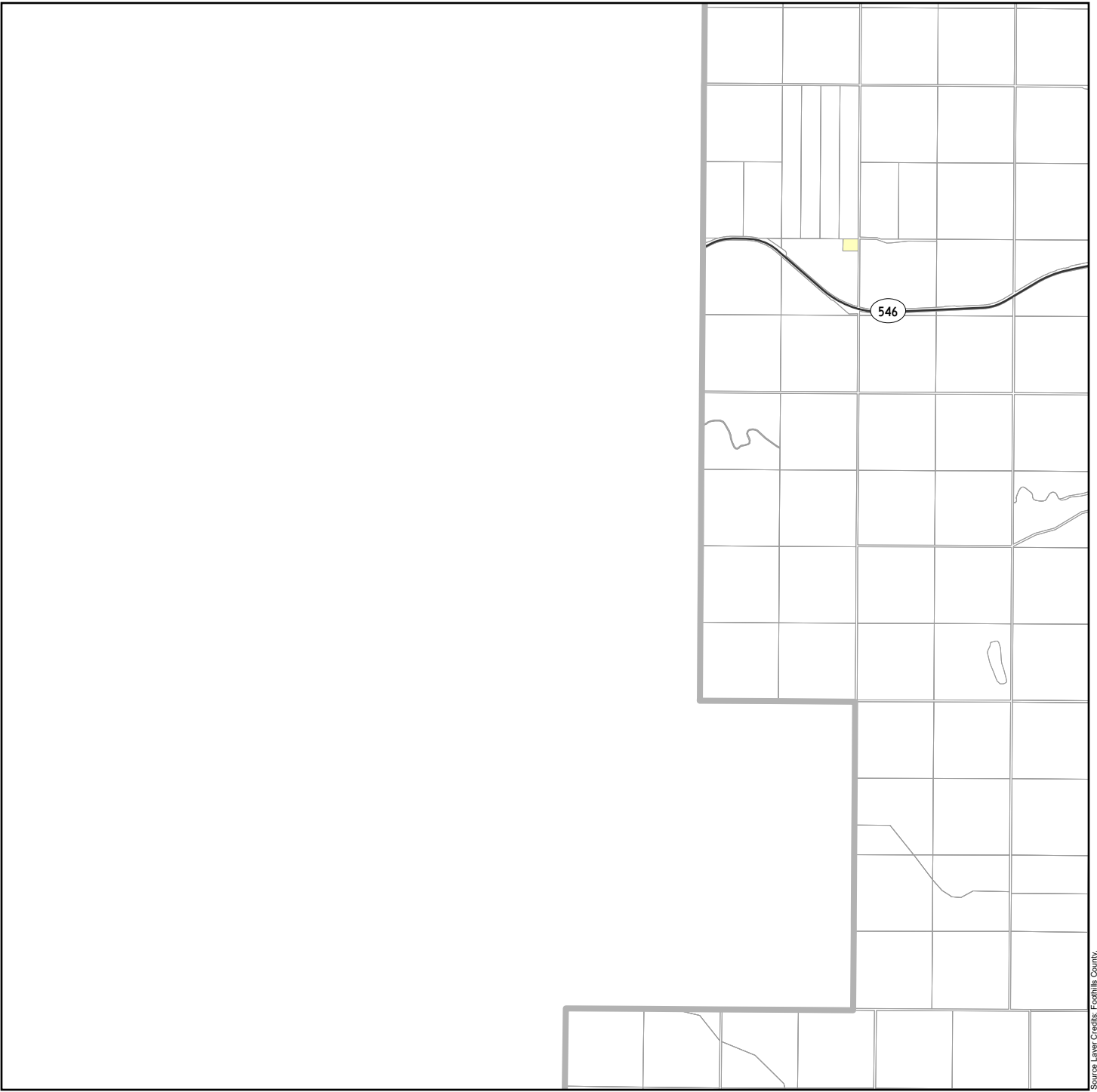
**APPENDIX A:
LAND SUPPLY
ANALYSIS**

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Source Layer Credits: Foothills County.



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country



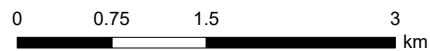
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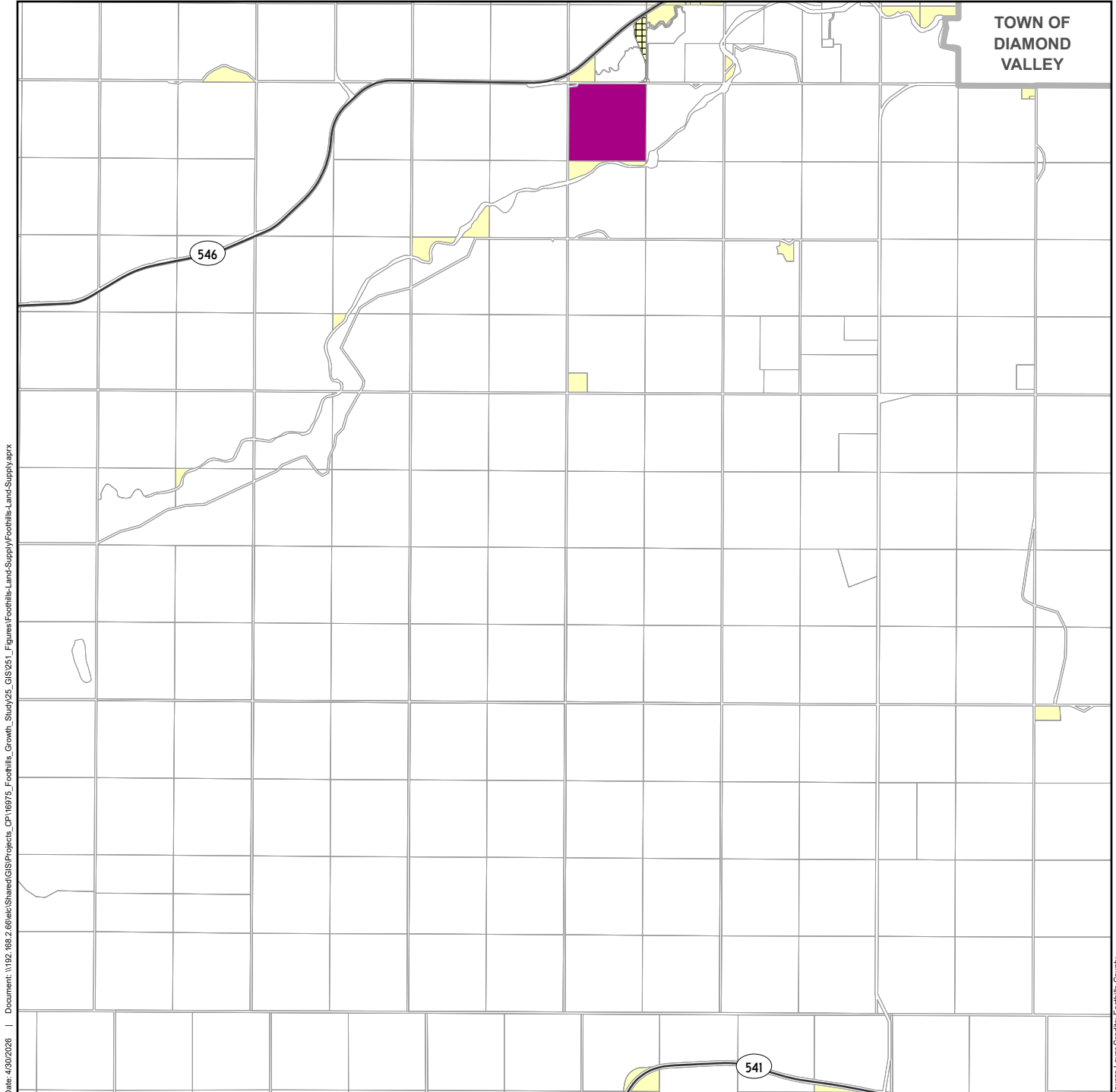


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GROWTH STUDY

APPENDIX A:
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Source Layer Credits: Foothills County



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Industrial Natural Resource Extraction



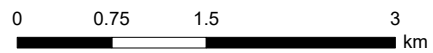
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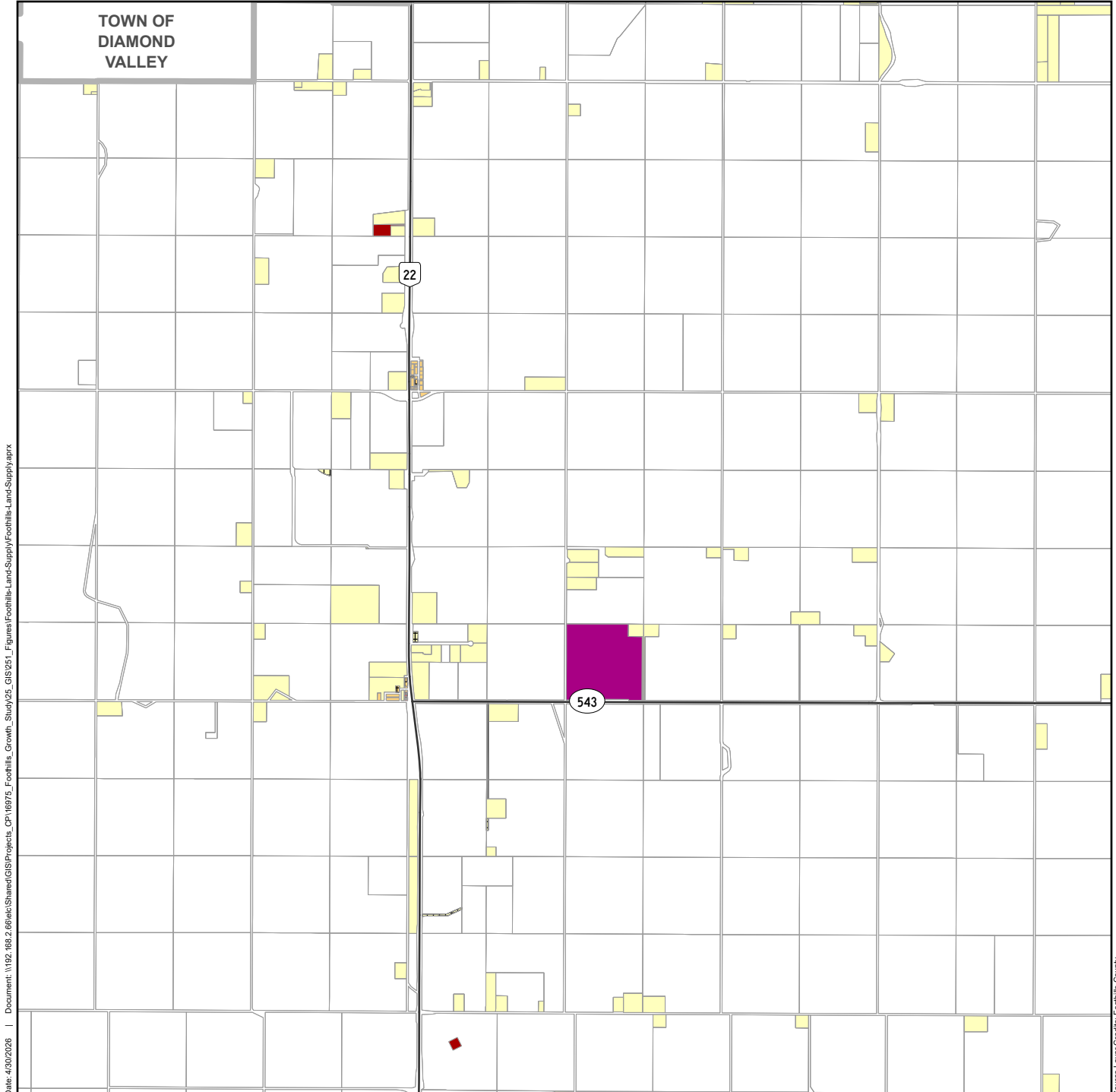
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LAND SUPPLY
ANALYSIS**

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Source Layer Credits: Foothills County.



- Municipal Boundary
- Approved Plan
- Parcel
- Vacant Parcel
- Absorbed Land**
- Agricultural
- Residential Country
- Residential Community
- Commercial Community
- Commercial Direct Control
- Industrial Natural Resource Extraction



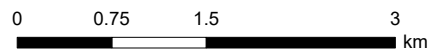
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GROWTH STUDY**

**APPENDIX A:
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ANALYSIS**

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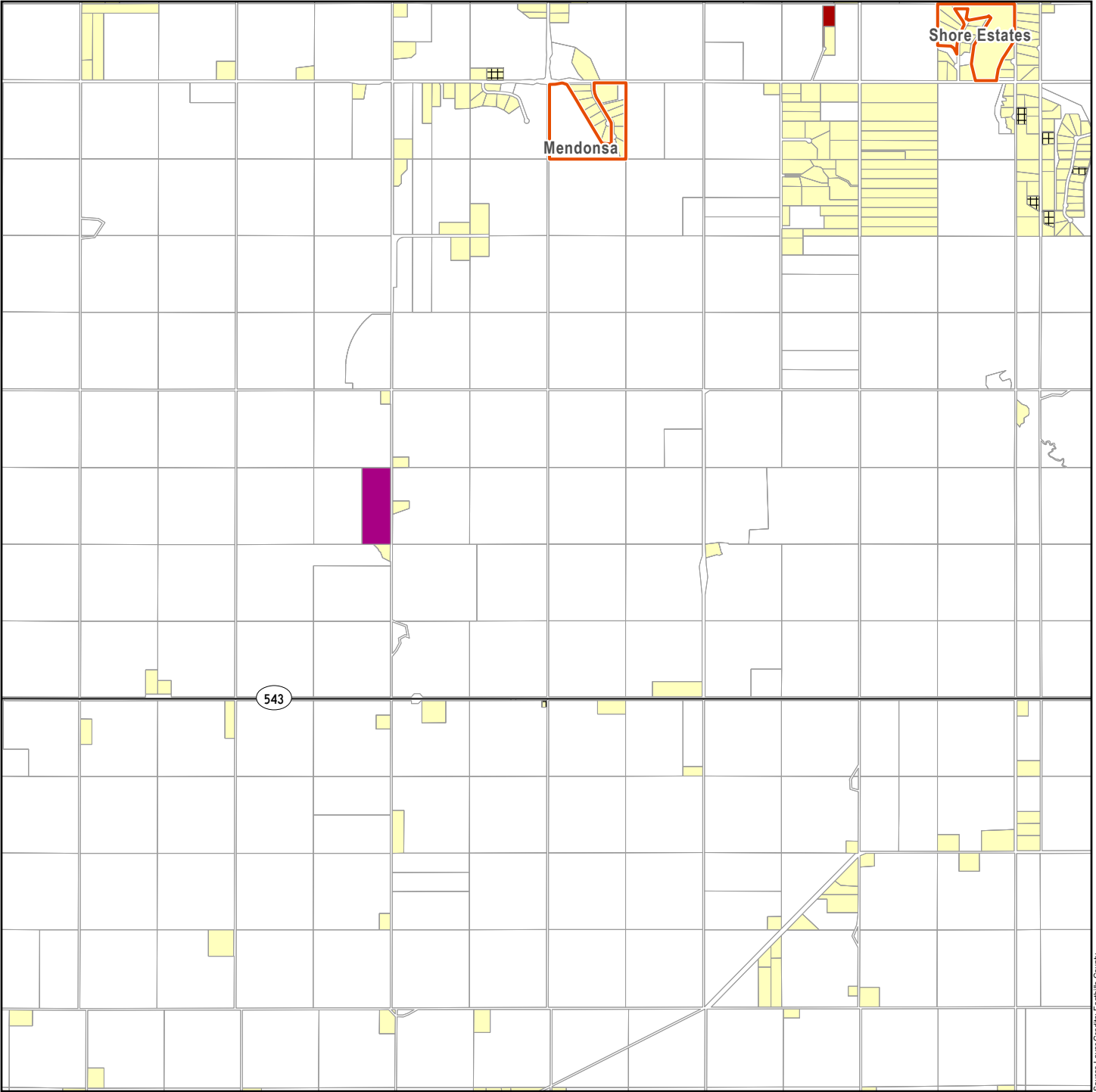






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Source Layer Credits: Foothills County



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Commercial Direct Control
 -  Industrial Natural Resource Extraction



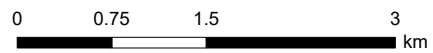
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LAND SUPPLY
ANALYSIS**

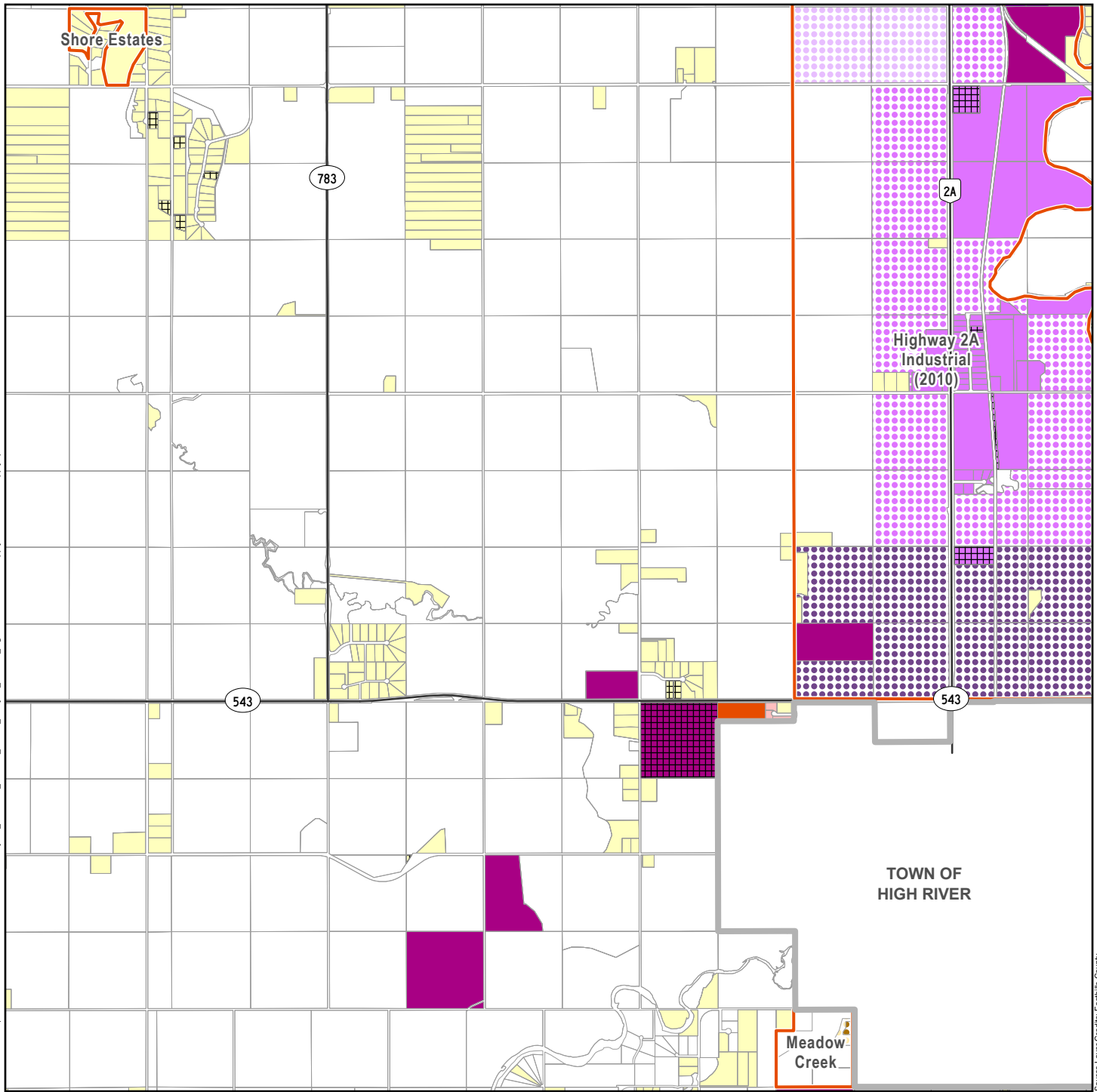
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Source Layer Credits: Foothills County.



- Municipal Boundary
- Approved Plan
- Parcel
- Vacant Parcel
- Absorbed Land**
- Agricultural
- Residential Country
- Residential Community

- Commercial Business Park
- Commercial Rural Business
- Industrial Edge
- Industrial General
- Industrial Hamlet
- Industrial Natural Resource Extraction

- Unabsorbed Land**
- Residential Community
- Residential Multi
- Gateway Interface
- Industrial Edge
- Industrial General



**TECHNICAL
GROWTH STUDY**

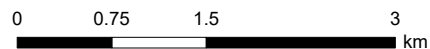
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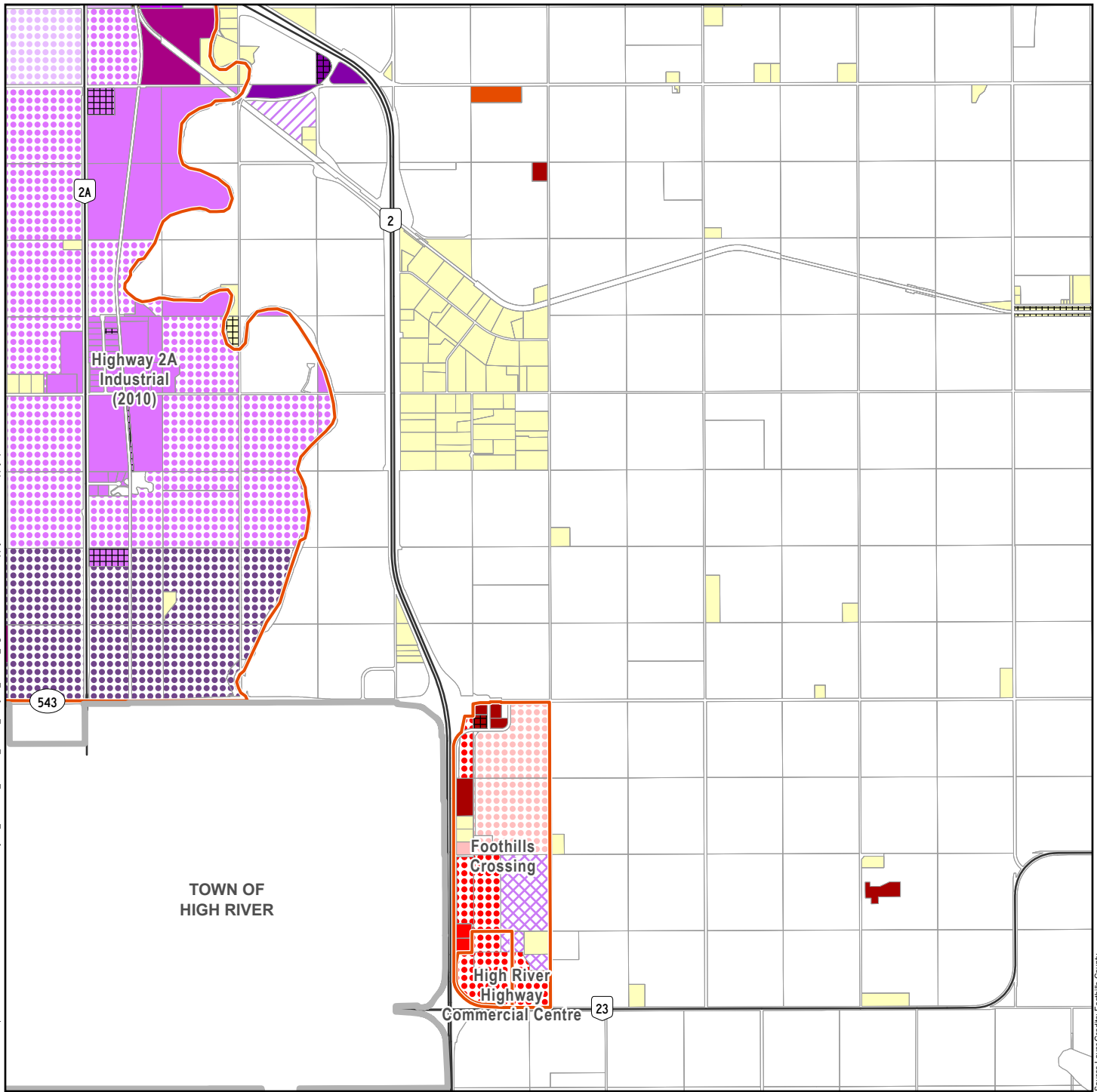


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Source Layer Credits: Foothills County



- Municipal Boundary
- Approved Plan
- Parcel
- Vacant Parcel
- Absorbed Land**
- Agricultural
- Agricultural Business
- Residential Country
- Residential Community

- Commercial Business Park
- Commercial Highway
- Commercial Rural Business
- Commercial Direct Control
- Industrial Edge
- Industrial General
- Industrial Hamlet
- Industrial Low Intensity

- Industrial Natural Resource Extraction
- Unabsorbed Land**
- Agricultural Business
- Gateway Interface
- Commercial Business Park
- Commercial Highway
- Industrial Edge
- Industrial General



**TECHNICAL
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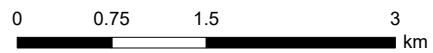
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LAND SUPPLY
ANALYSIS**

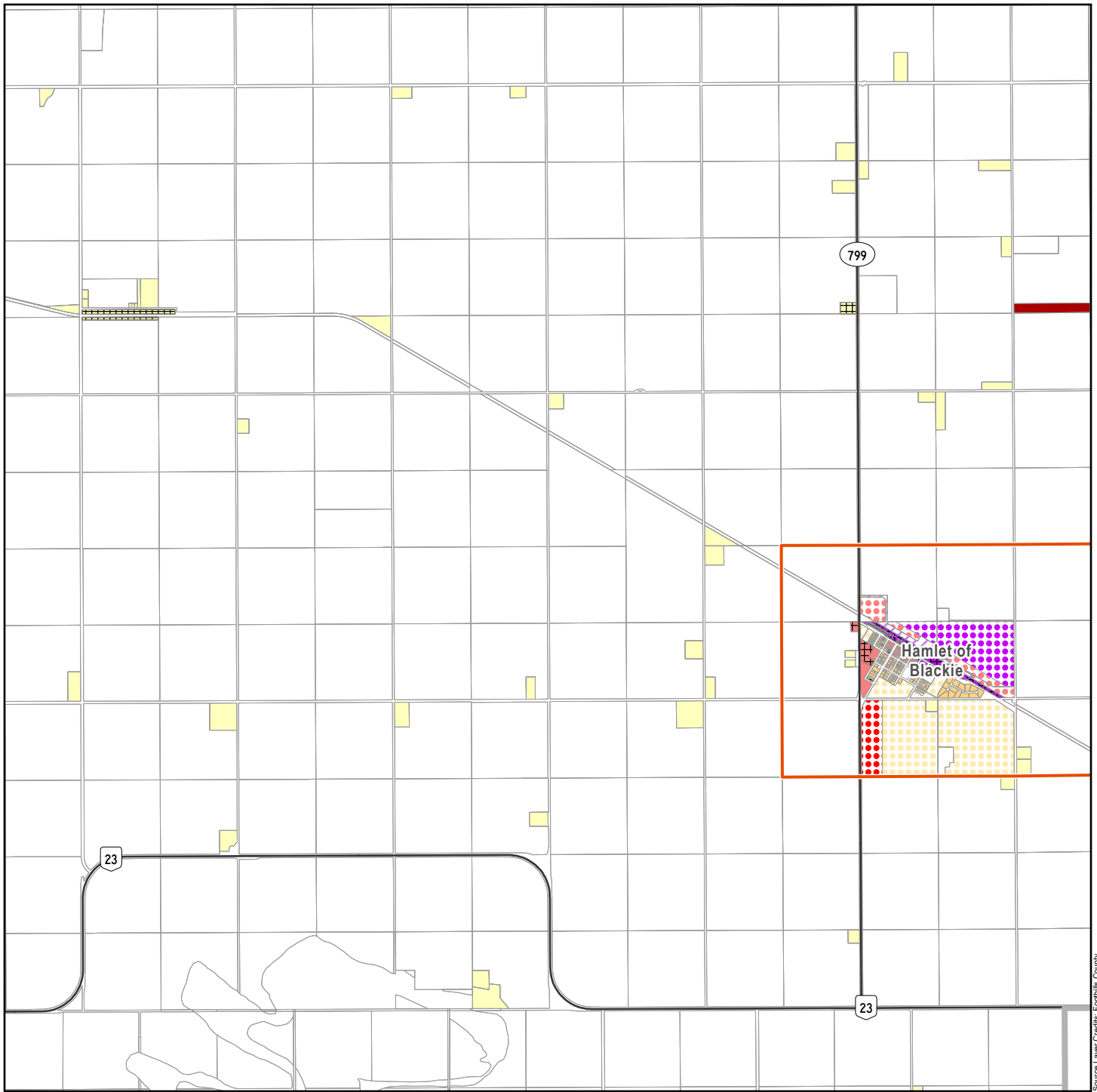
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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural

-  Agricultural Business
-  Residential Country
-  Residential Community
-  Commercial Community
-  Commercial Direct Control
-  Industrial Hamlet

- Unabsorbed Land**
-  Residential Community
 -  Commercial Community
 -  Commercial Highway
 -  Industrial Hamlet



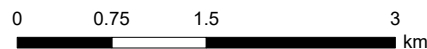
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LAND SUPPLY
ANALYSIS**

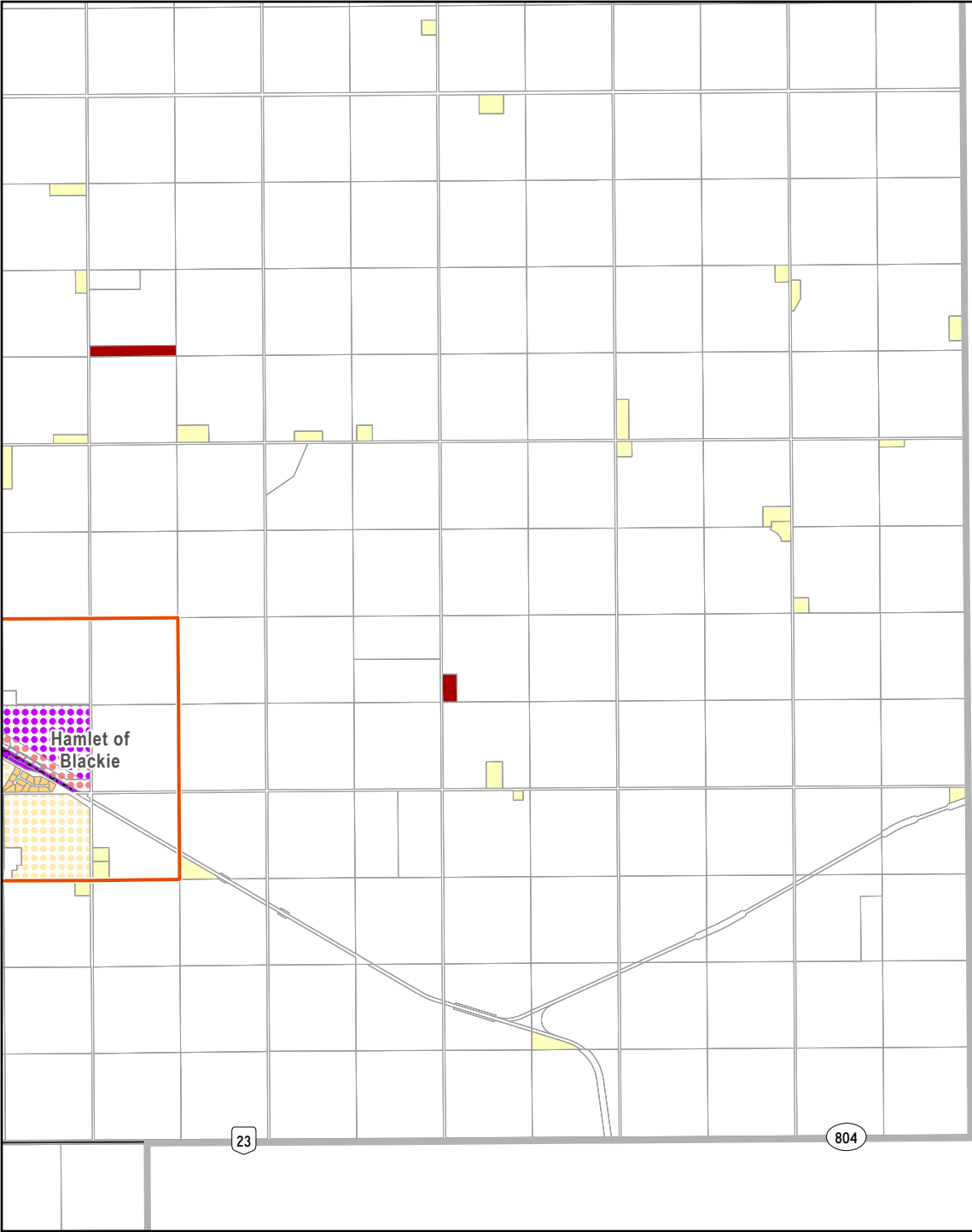
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Source Layer Credits: Foothills County.



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Agricultural Business
-  Residential Country

-  Residential Community
-  Commercial Direct Control
-  Industrial Hamlet
- Unabsorbed Land**
-  Residential Community
-  Commercial Community
-  Industrial Hamlet



**TECHNICAL
GROWTH STUDY**

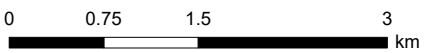
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ANALYSIS**

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


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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country



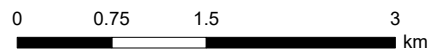
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LAND SUPPLY
ANALYSIS**

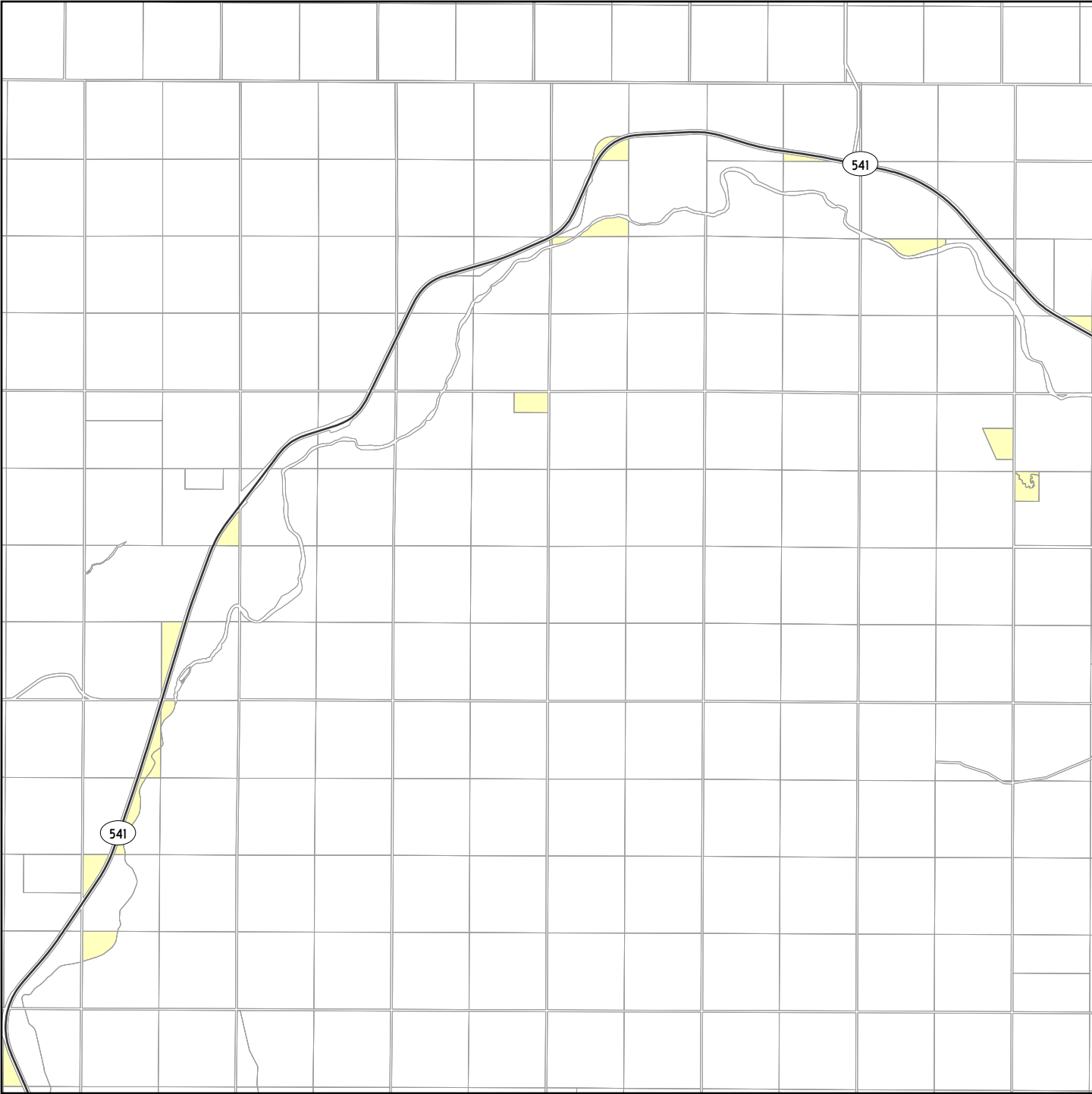
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Source Layer Credits: Foothills County.



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Industrial Natural Resource Extraction



**TECHNICAL
GROWTH STUDY**

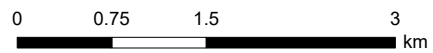
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LAND SUPPLY
ANALYSIS**

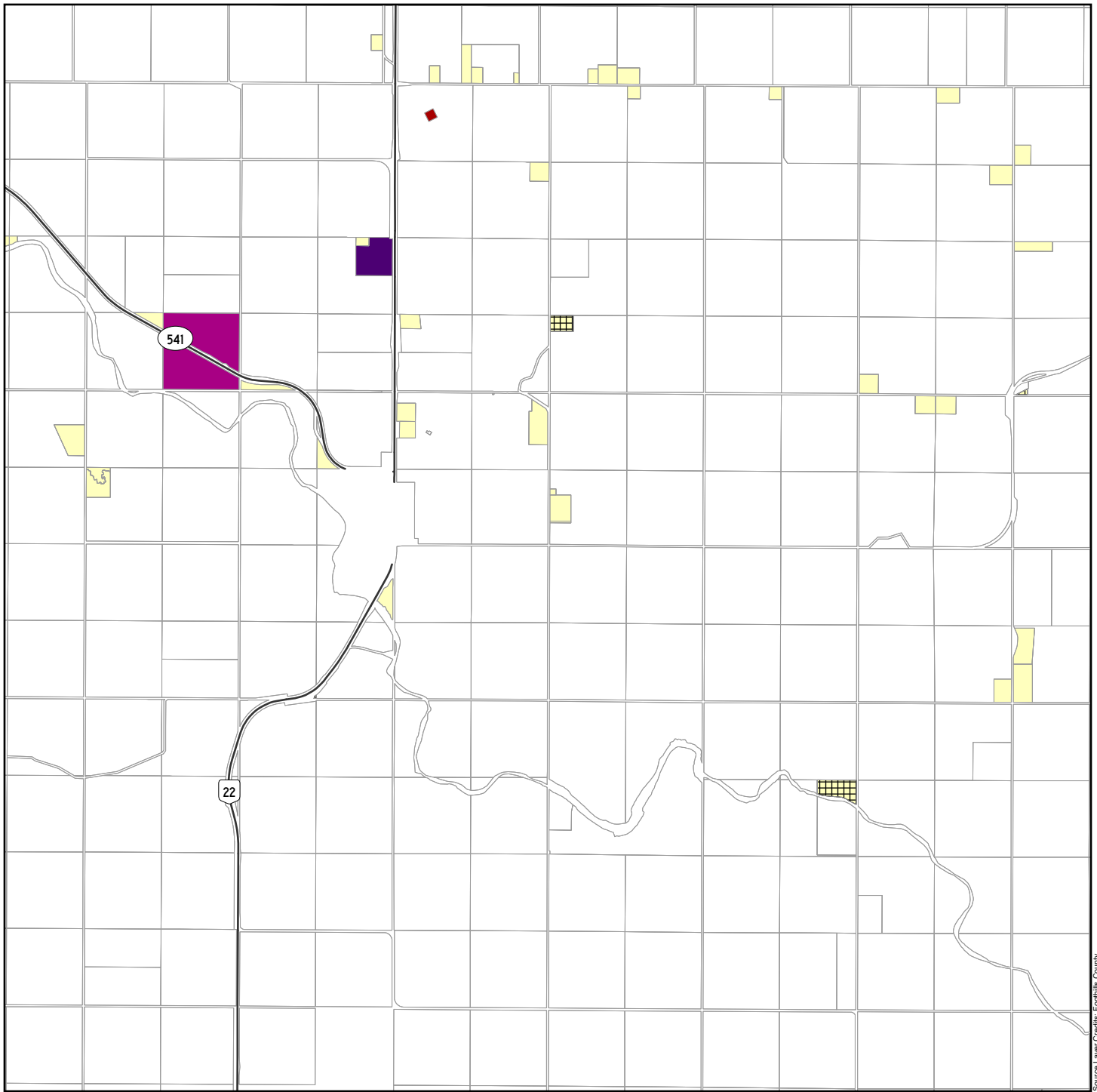
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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country
-  Commercial Direct Control
-  Industrial Natural Resource Extraction
-  Industrial Direct Control



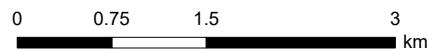
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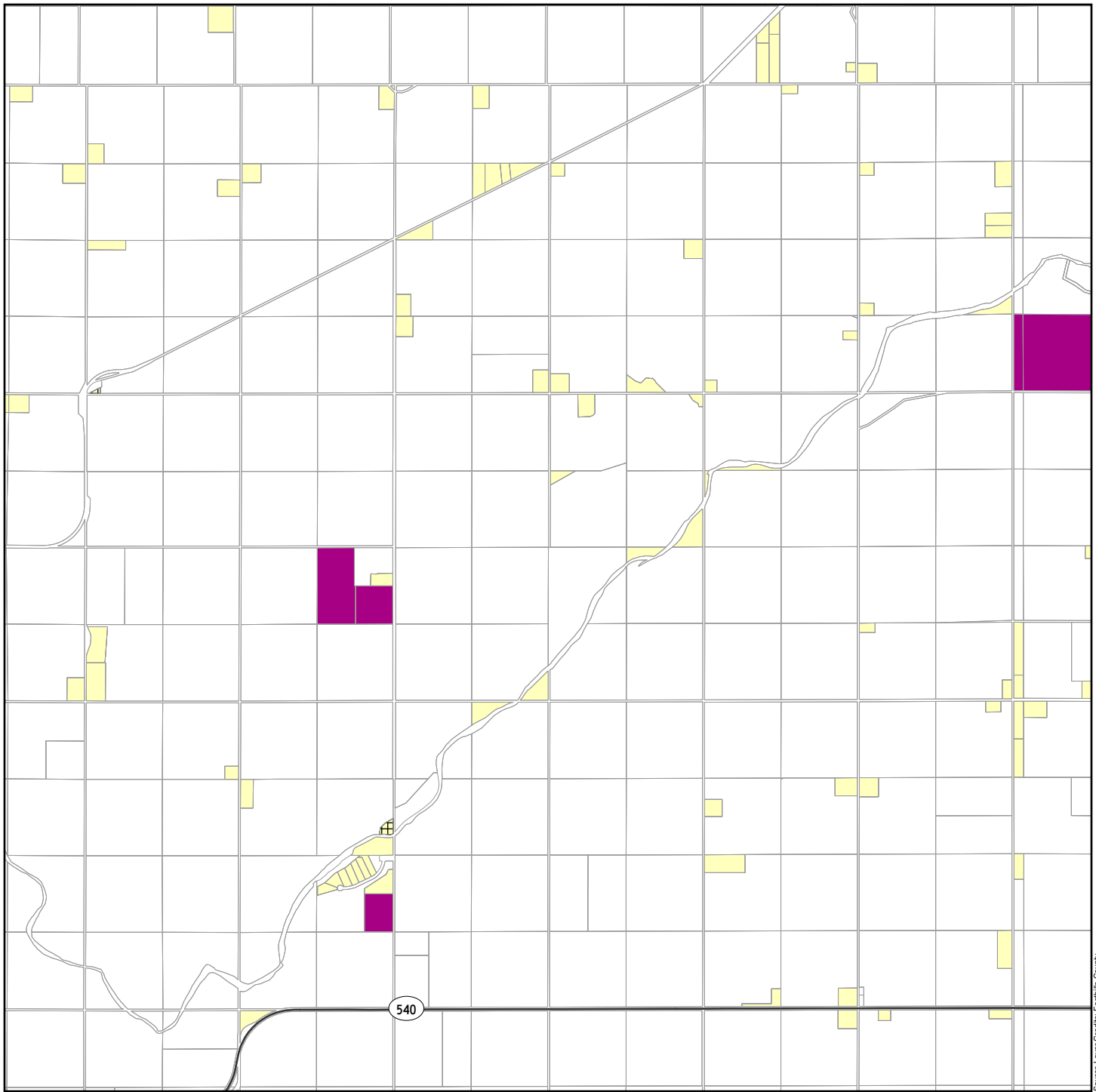
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LAND SUPPLY
ANALYSIS**





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

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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

Absorbed Land

-  Agricultural
-  Residential Country
-  Industrial Natural Resource Extraction



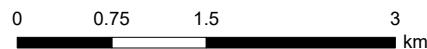
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GROWTH STUDY

APPENDIX A:
LAND SUPPLY
ANALYSIS

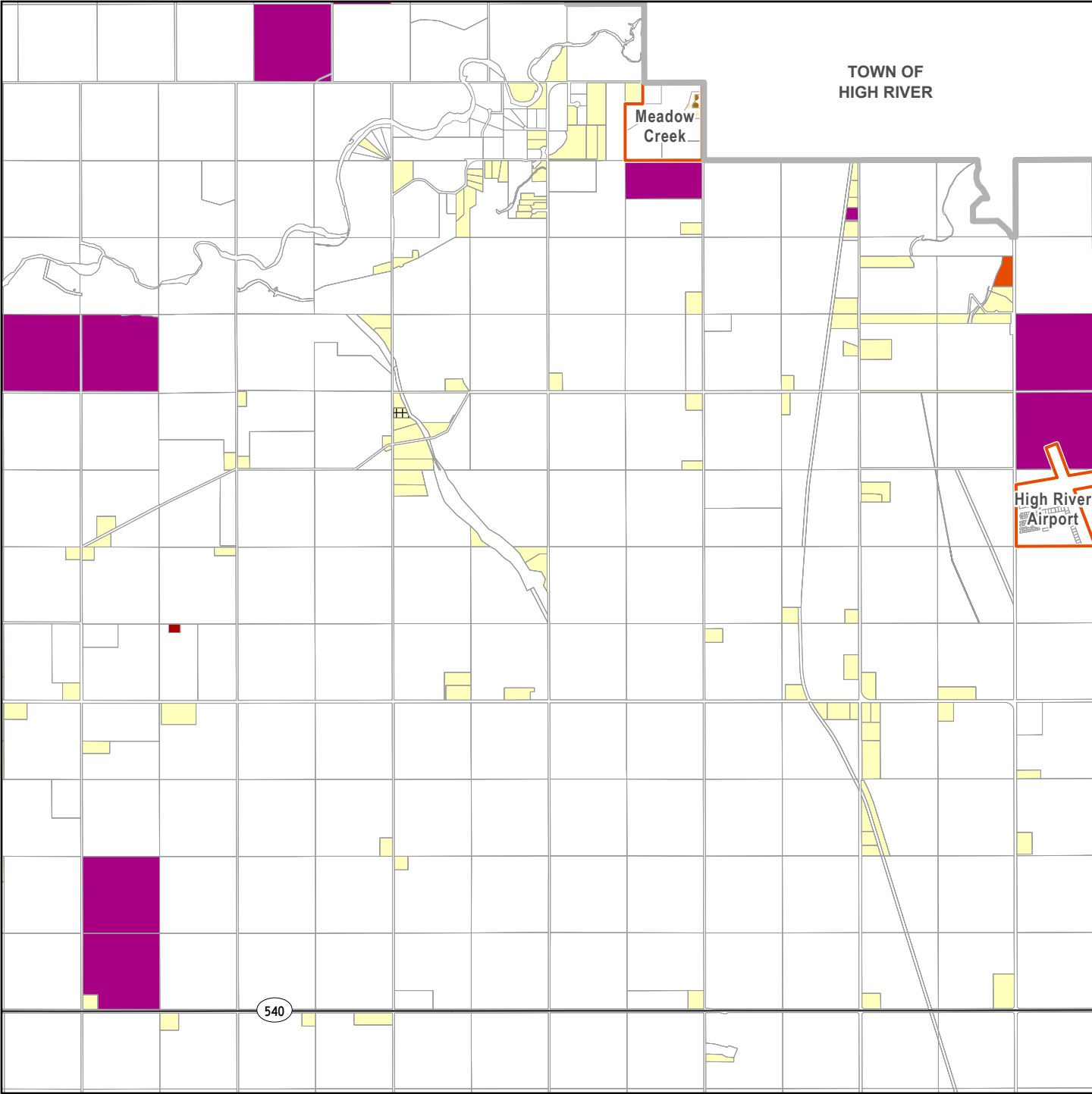
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Source Layer Credits: Foothills County.



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country

-  Commercial Rural Business
-  Commercial Direct Control
-  Industrial Natural Resource Extraction

- Unabsorbed Land**
-  Residential Community
 -  Residential Multi



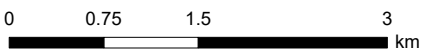
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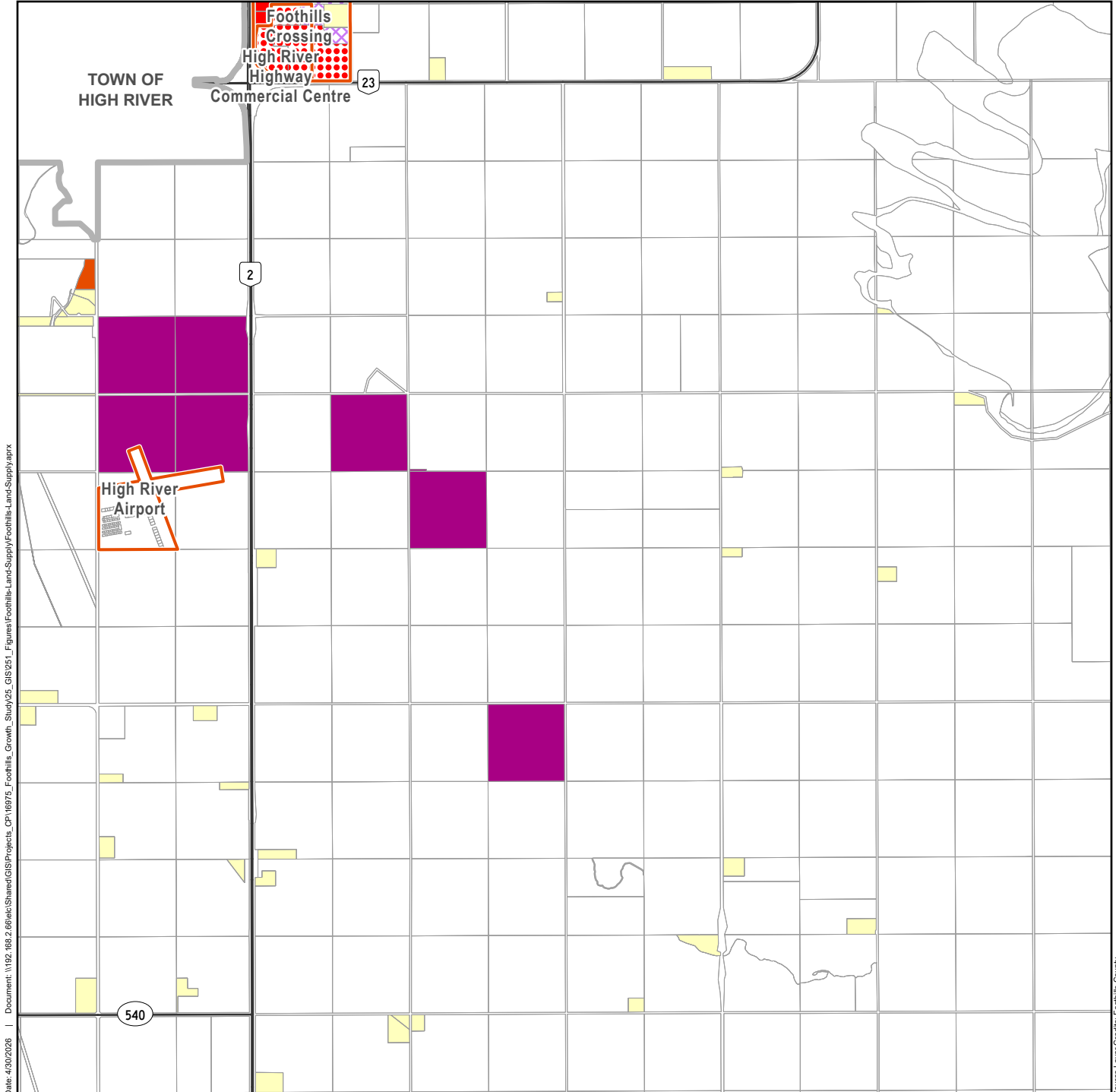
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LAND SUPPLY
ANALYSIS**

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Source Layer Credits: Foothills County.



- | | |
|----------------------|--|
| Municipal Boundary | Commercial Highway |
| Approved Plan | Commercial Rural Business |
| Parcel | Industrial Natural Resource Extraction |
| Vacant Parcel | |
| Absorbed Land | Unabsorbed Land |
| Agricultural | Agricultural Business |
| Residential Country | Commercial Highway |



**TECHNICAL
GROWTH STUDY**

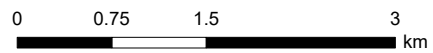
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LAND SUPPLY
ANALYSIS**

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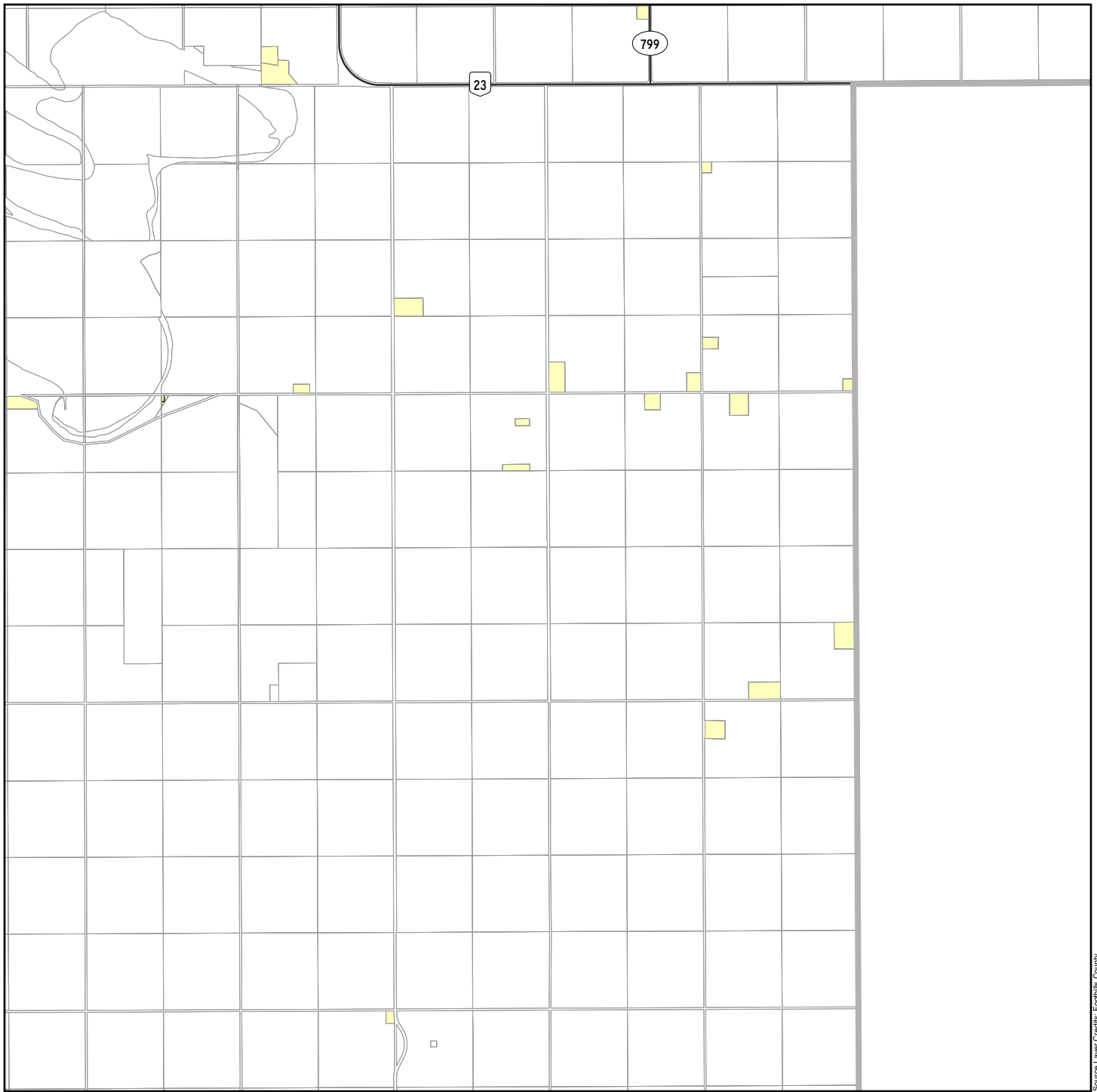


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


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Source Layer Credits: Foothills County.



-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country



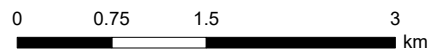
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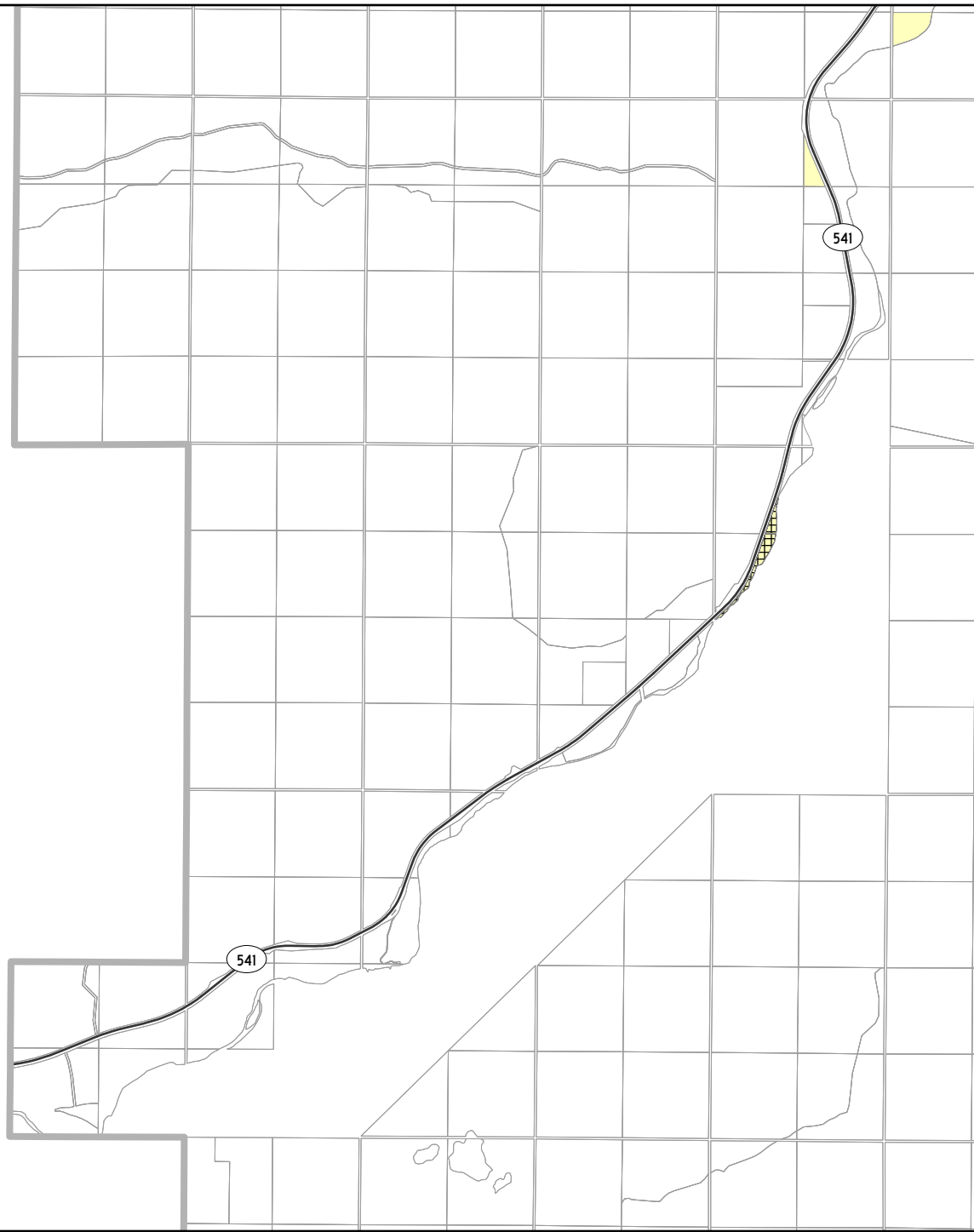


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


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-  Municipal Boundary
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-  Vacant Parcel
- Absorbed Land**
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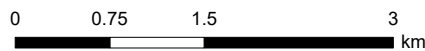
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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Industrial Natural Resource Extraction



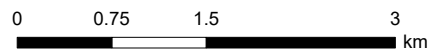
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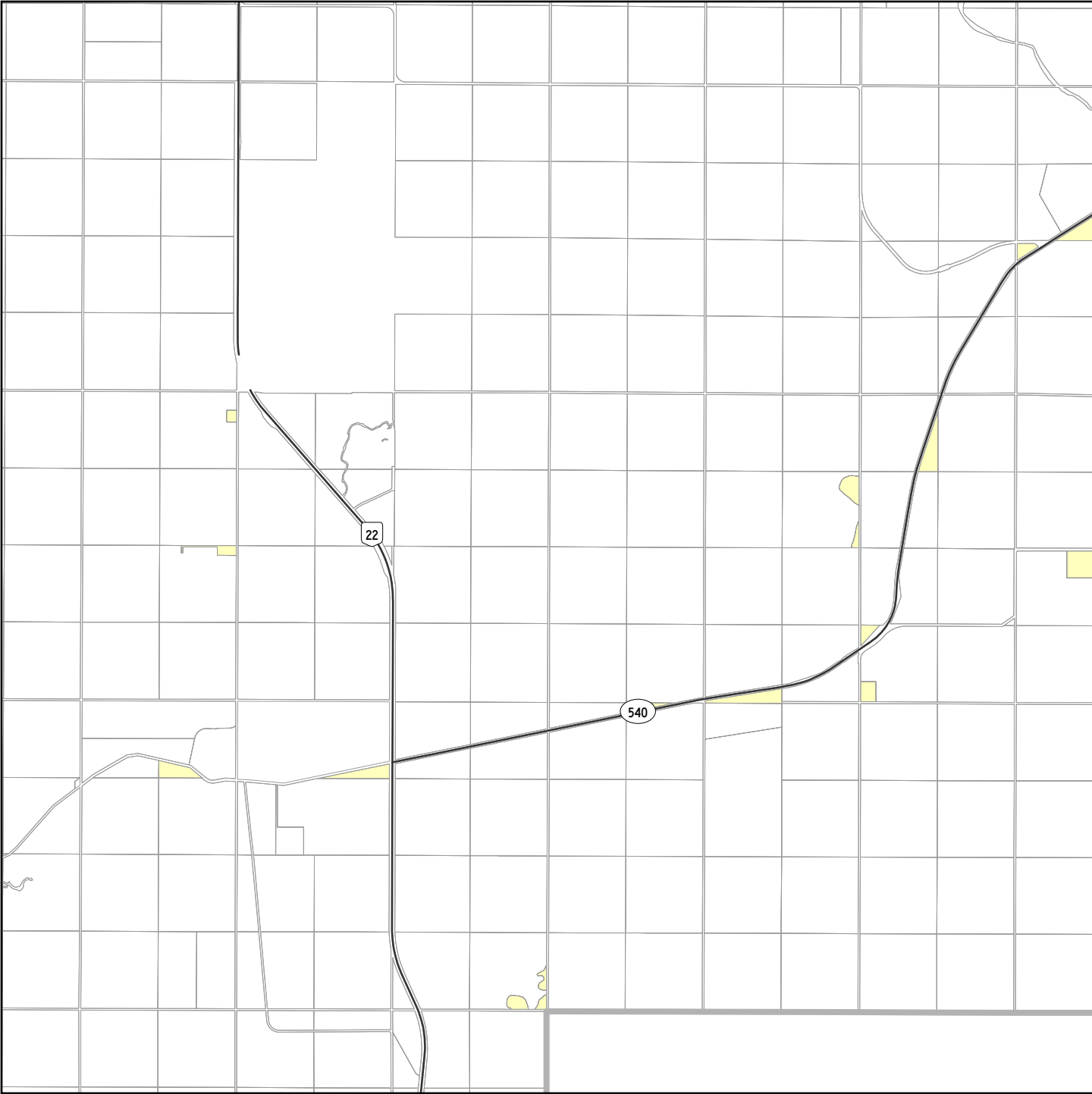
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
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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country



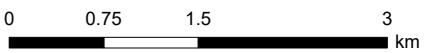
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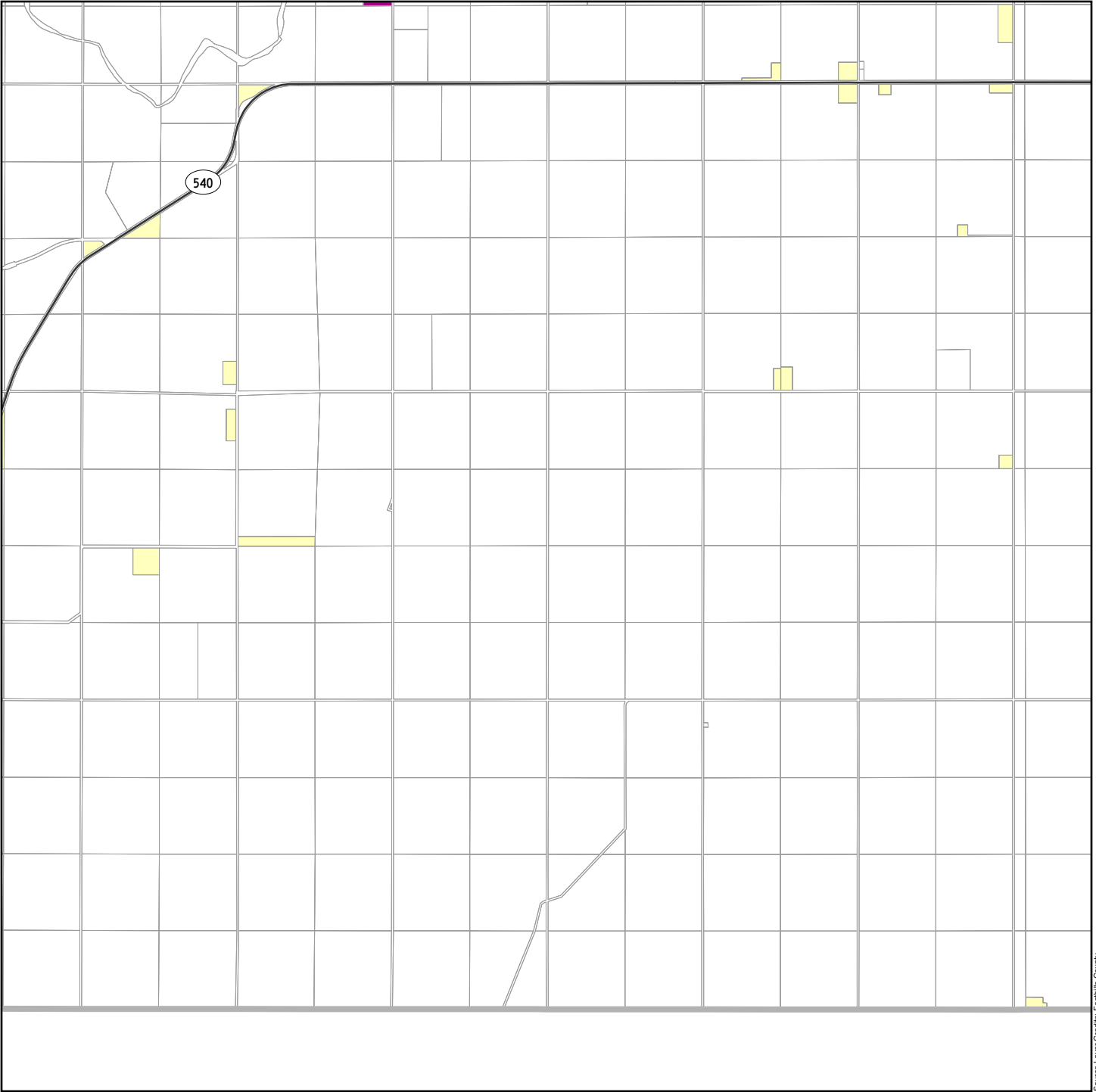






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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Industrial Natural Resource Extraction



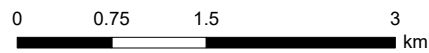
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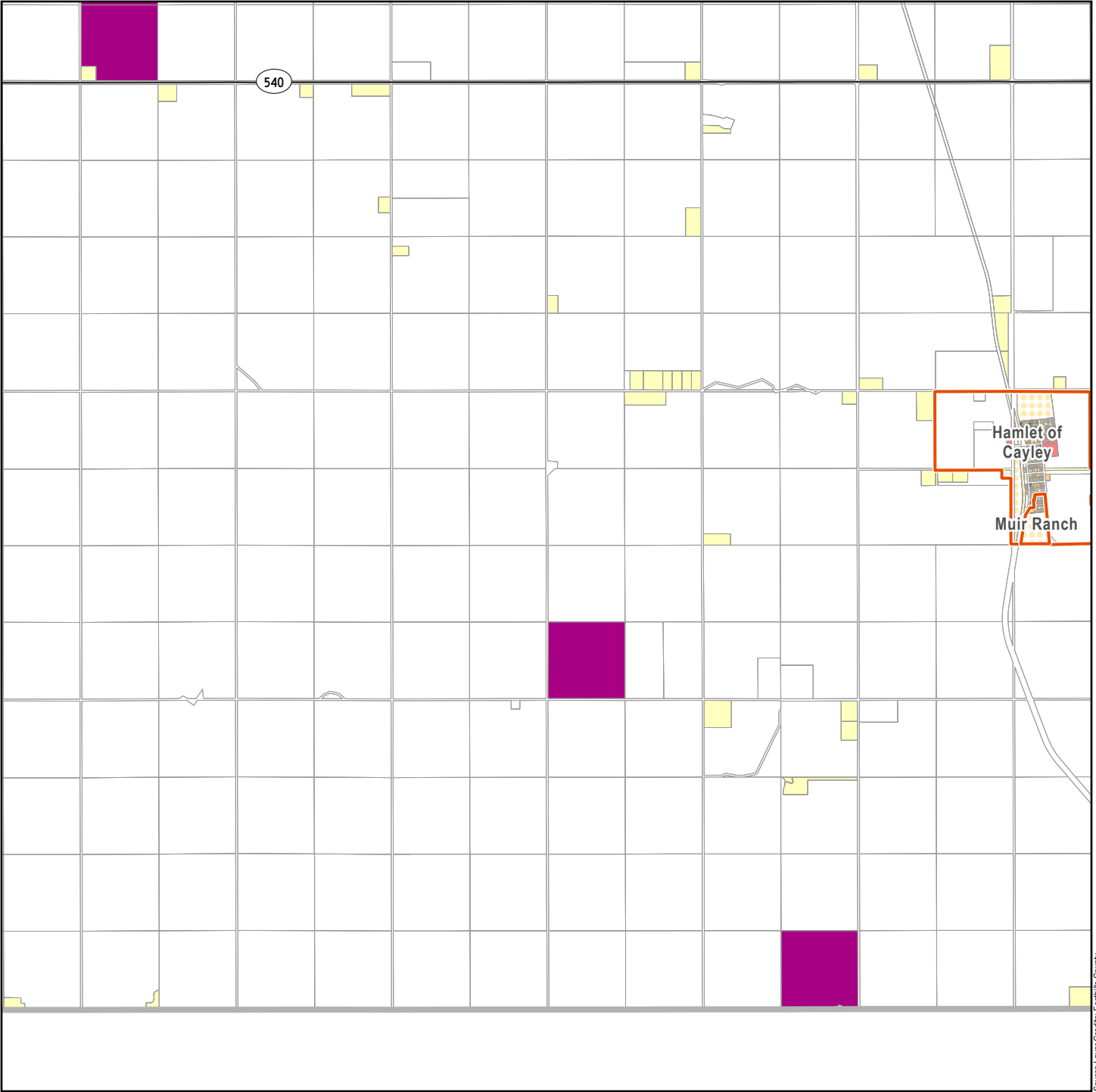
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- Municipal Boundary
- Approved Plan
- Parcel
- Vacant Parcel
- Absorbed Land**
- Agricultural
- Residential Country

- Residential Community
- Commercial Community
- Industrial Natural Resource Extraction

- Unabsorbed Land**
- Residential Country
- Residential Community



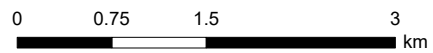
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








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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country

-  Residential Community
-  Commercial Community
- Unabsorbed Land**
-  Residential Country
-  Residential Community



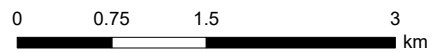
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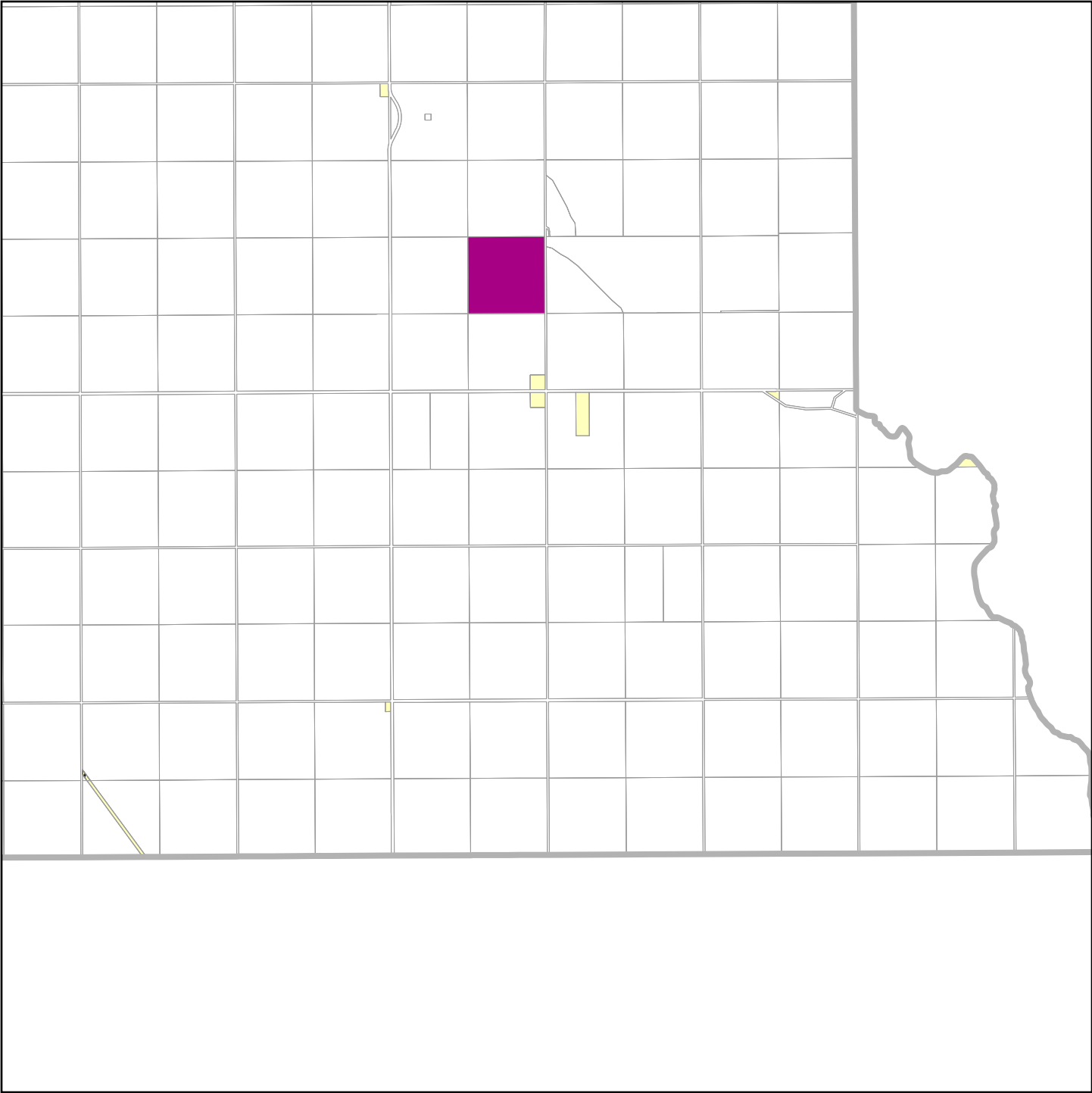
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



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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

- Absorbed Land**
-  Agricultural
 -  Residential Country
 -  Industrial Natural Resource Extraction



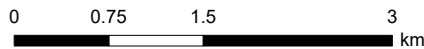
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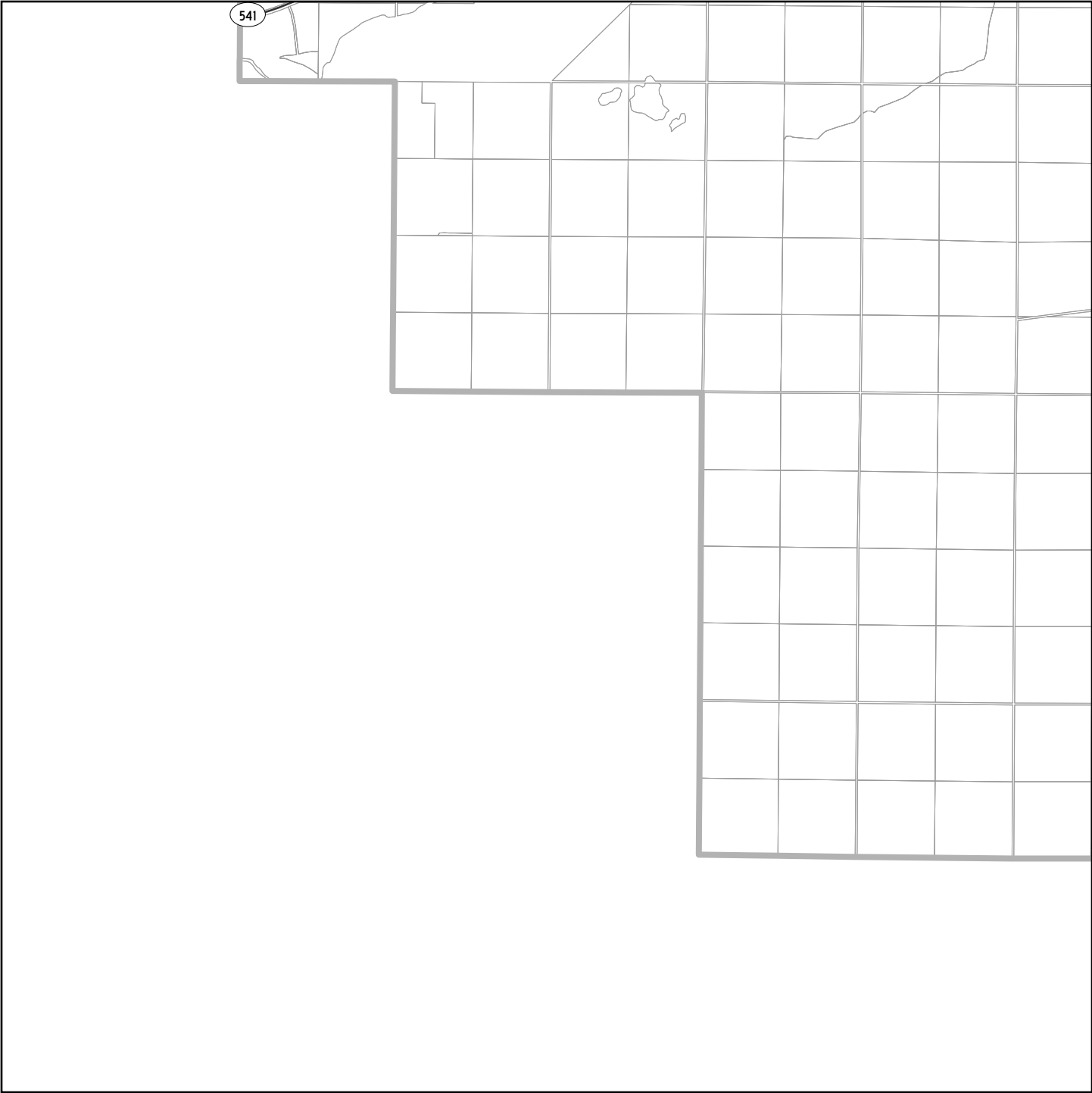
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-  Municipal Boundary
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-  Parcel
-  Vacant Parcel
- Absorbed Land**
-  Agricultural



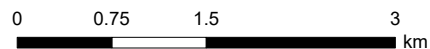
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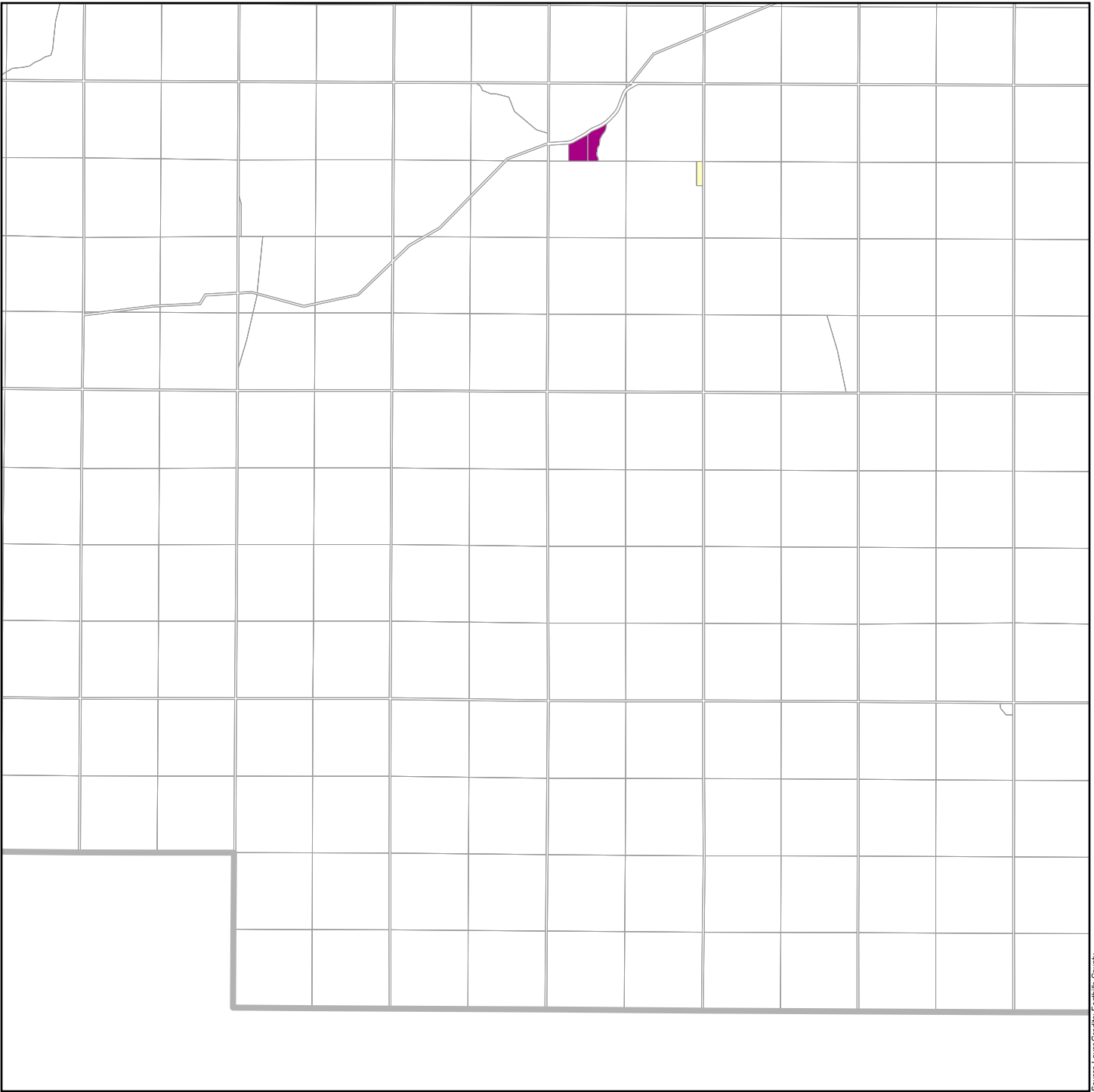






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-  Municipal Boundary
-  Approved Plan
-  Parcel
-  Vacant Parcel

Absorbed Land

-  Agricultural
-  Residential Country
-  Industrial Natural Resource Extraction



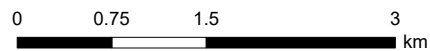
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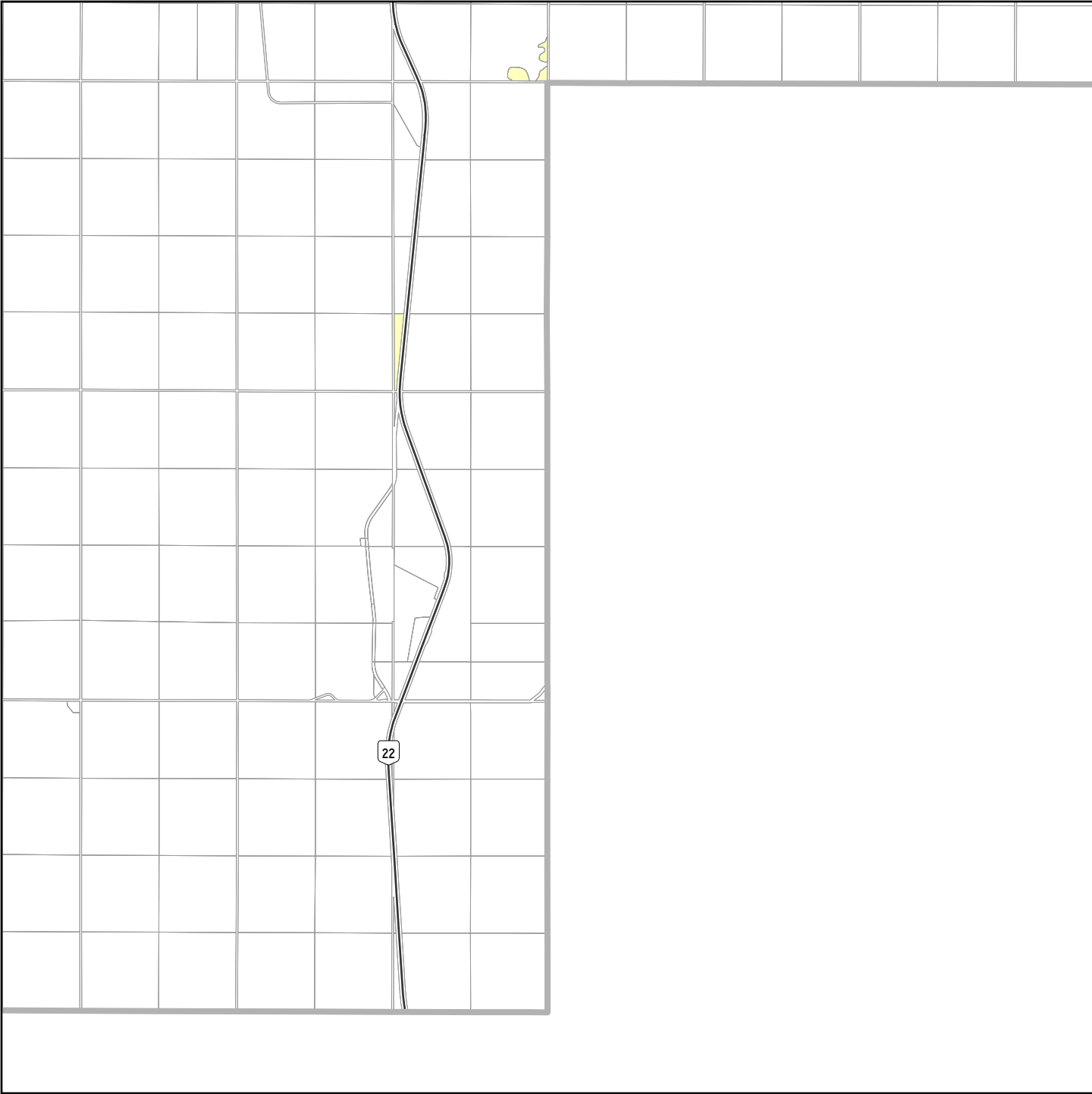
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
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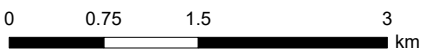




-  Municipal Boundary
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-  Vacant Parcel
- Absorbed Land**
-  Agricultural
-  Residential Country



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Appendix B. Additional Land Supply Tables

Table B-1 Foothills County Net Developable Absorbed Land Supply by Growth Management District

Core Land Use District	Central		East		Northwest		South Central		Southwest		County Total	
	Acres	%	Acres	%	Acres	%	Acres	%	Acres	%	Acres	%
Residential Community	403.6	60.7%	39.0	5.9%	173.2	26.1%	44.3	6.7%	4.4	0.7%	664.5	1.2%
Country Residential	17,806.2	40.4%	2,502.5	5.7%	15,743.6	35.8%	7,225.4	16.4%	753.4	1.7%	44,031.0	81.1%
Residential Multi-Family	6.0	100.0%									6.0	0.0%
Residential Subtotal	18,215.8	40.7%	2,541.5	5.7%	15,916.7	35.6%	7,269.6	16.3%	757.8	1.7%	44,701.5	82.4%
Community Commercial	15.6	19.5%	25.3	31.6%	29.3	36.6%	9.2	11.5%	0.6	0.8%	80.1	0.1%
Commercial Direct Control	344.5	48.7%	74.3	10.5%	229.9	32.5%	53.2	7.5%	6.1	0.9%	708.0	1.3%
Highway Commercial	73.1	100.0%									73.1	0.1%
Rural Business	24.7	40.5%					36.3	59.5%			61.0	0.1%
Commercial Subtotal	458.0	49.7%	99.6	10.8%	259.3	28.1%	98.7	10.7%	6.8	0.7%	922.2	1.7%
Business Park	115.5	93.8%					7.7	6.2%			123.1	0.2%
Industrial Direct Control	3.7	1.5%	155.6	63.7%	49.8	20.4%			35.3	14.5%	244.5	0.5%
Industrial Edge	96.9	100.0%									96.9	0.2%
General Industry	870.0	100.0%									870.0	1.6%
Hamlet Industry	147.8	84.9%	26.2	15.1%							174.0	0.3%
Low Intensity Industry	43.9	100.0%									43.9	0.1%
Natural Resource Extraction	1,561.3	23.2%	683.6	10.2%	1,287.2	19.2%	3,016.0	44.9%	169.0	2.5%	6,717.1	12.4%
Industrial Subtotal	2,839.0	34.3%	865.4	10.5%	1,337.1	16.2%	3,023.7	36.6%	204.3	2.5%	8,269.5	15.2%
Agricultural Business	195.7	53.2%	18.3	5.0%	154.0	41.8%					367.9	0.7%
Agricultural Subtotal	195.7	53.2%	18.3	5.0%	154.0	41.8%					367.9	0.7%
Total	21,708.5	40.0%	3,524.8	6.5%	17,667.0	32.6%	10,392.0	19.2%	968.8	1.8%	54,261.2	100.0%

Table B-2 Foothills County Gross Developable Unabsorbed Land Supply by Growth Management District

Core Land Use District	Central		East		Northwest		South Central		County Total	
	Acres	%	Acres	%	Acres	%	Acres	%	Acres	%
Cluster Residential	640.4	100.0%							640.4	9.8%
Residential Community	1,045.1	73.5%	292.5	20.6%			85.3	6.0%	1,422.9	21.7%
Country Estate Residential	32.5	100.0%							32.5	0.5%
Country Residential	309.3	64.4%			169.3	35.2%	1.9	0.4%	480.5	7.3%
Residential Multi-Family	89.3	97.0%					2.8	3.0%	92.1	1.4%
Residential Subtotal	2,116.6	79.3%	292.5	11.0%	169.3	6.3%	89.9	3.4%	2,668.4	40.6%
Community Commercial	16.0	27.1%	42.9	72.9%					58.8	0.9%
Commercial Direct Control	120.9	100.0%							120.9	1.8%
Highway Commercial	553.9	92.7%	43.6	7.3%					597.4	9.1%
Commercial Subtotal	690.7	88.9%	86.4	11.1%					777.1	11.8%
Business Park	288.8	100.0%							288.8	4.4%
Industrial Direct Control	601.9	100.0%							601.9	9.2%
Industrial Edge	1,991.7	100.0%							1,991.7	30.3%
General Industry			112.2	100.0%					112.2	1.7%
Industrial Subtotal	2,882.4	96.3%	112.2	3.7%					2,994.7	45.6%
Agricultural Business	127.3	100.0%							127.3	1.9%
Agricultural Subtotal	127.3	100.0%							127.3	1.9%
Total	5,817.0	88.6%	491.1	7.5%	169.3	2.6%	89.9	1.4%	6,567.5	100.0%



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