

RECEIVED  
MINISTRY OF MUNICIPAL  
AFFAIRS

MAY 29 2008

KINGSTON

**OFFICIAL PLAN REVIEW 2007-2008  
LAND NEEDS BACKGROUND STUDY**

**May 7, 2008**

Prepared for

**MUNICIPALITY OF NORTH GRENVILLE**

285 County Road No. 44

P.O. Box 130

Kemptville, Ontario

K0G 1J0

Prepared by

**J.L. RICHARDS & ASSOCIATES LIMITED**

Consulting Engineers, Architects & Planners

864 Lady Ellen Place

Ottawa, Ontario

K1Z 5M2

JLR 22509

**OFFICIAL PLAN REVIEW 2007-2008  
LAND NEEDS BACKGROUND STUDY  
MUNICIPALITY OF NORTH GRENVILLE**

**- TABLE OF CONTENTS -**

	<u>PAGE</u>
<b>1.0 INTRODUCTION.....</b>	<b>1</b>
1.1 Study Context.....	1
1.2 Study Objectives.....	3
<b>2.0 GROWTH PROJECTIONS (DEMAND).....</b>	<b>4</b>
2.1 Regional Analysis.....	5
2.2 Population Growth Trends.....	5
2.3 Population Projections.....	5
2.4 Housing Demand.....	9
2.4.1 Headship Rates.....	9
2.4.2 Household Demand Propensities.....	12
2.4.3 Household Size and Composition.....	14
2.4.4 Housing Demand Preferences.....	15
2.4.5 Housing Affordability.....	16
2.4.5.1 Ownership Housing.....	17
2.4.5.2 Rental Housing.....	18
2.4.5.3 Ottawa Real Estate Board Statistics.....	19
2.5 Projected Housing Demand.....	20
2.6 Employment Projections.....	24
2.6.1 Canada's Macroeconomic Environment.....	25
2.6.2 Ontario Macroeconomic Environment.....	26
2.6.3 North Grenville Economic Development Strategy.....	26
2.6.4 Jobs in North Grenville.....	26
2.6.5 Labour Force.....	26
2.6.6 Employment Projections for North Grenville.....	27
2.7 Non-Residential Projections.....	28
2.7.1 Industrial, Commercial, Institutional (ICI) Building Permit Activity.....	28
<b>3.0 LAND SUPPLY.....</b>	<b>29</b>
3.1 Residential Land Supply.....	29
3.1.1 Residential Development Activity.....	29
3.1.2 Residential Intensification Opportunities.....	32
3.2 Industrial, Commercial, Institutional Vacant Land Supply.....	33
3.2.1 Industrial / Commercial / Institutional Land (ICI).....	33
3.2.2 ICI Intensification Opportunities.....	34
3.3 Land Supply.....	34
<b>4.0 LAND NEEDS ANALYSIS (Supply versus Demand).....</b>	<b>35</b>
4.1 Residential Supply vs. Demand – 3, 10 and 20 years.....	35
4.2 Industrial, Commercial, Institutional Land Needs.....	38
<b>5.0 SERVICING.....</b>	<b>39</b>

**OFFICIAL PLAN REVIEW 2007-2008  
LAND NEEDS BACKGROUND STUDY  
MUNICIPALITY OF NORTH GRENVILLE**

**- TABLE OF CONTENTS -  
(cont'd)**

	<u>PAGE</u>
<b>6.0 CONCLUSION .....</b>	<b>39</b>
<b>7.0 REQUESTS FOR EXPANSION TO A SETTLEMENT AREA BOUNDARY OR REDESIGNATION .....</b>	<b>40</b>
7.1 Requests for Inclusion or Redesignation.....	40
7.2 Conclusion.....	43

**- LIST OF TABLES -**

Table 2.1	Historical and Projected Population for the United Counties of Leeds and Grenville and the Municipality of North Grenville, Five-Year Increments, 1996-2031 .....	6
Table 2.2	Historical and Projected Population for the Municipality of North Grenville, Based on Ottawa Regional Analysis: MMAH, 2002 (Five Year Increments, 1996-2021).....	7
Table 2.3	Past Growth Rates for the Municipality of North Grenville (Five-Year Increments 1986-2006) .....	8
Table 2.4	Projected Population for the Municipality of North Grenville (Five-Year Increments 2006-2028) .....	8
Table 2.5	Population Projection by Age Group, North Grenville .....	9
Table 2.6	Household Maintainers, Population and Headship Rates by Age, 2006.....	10
Table 2.7	Household Projections, 2011-2028 Census Data (2006) and Projections (2011 to 2028) .....	12
Table 2.8	Structural Type of Dwelling by Age Groups, 2006 Census .....	13
Table 2.9	Household Size and Composition Trends .....	14
Table 2.10	Household Size, North Grenville, 2006-2031 .....	15
Table 2.11	Residential Building Permit Activity (2001-2006).....	16
Table 2.12	Residential Sales (2006-2008).....	19
Table 2.13	Structural Type of Dwelling by Age Group, 2006 Census .....	20

**OFFICIAL PLAN REVIEW 2007-2008  
LAND NEEDS BACKGROUND STUDY  
MUNICIPALITY OF NORTH GRENVILLE**

---

**- TABLE OF CONTENTS -  
(cont'd)**

		<u>PAGE</u>
Table 2.14	Housing Demand Projection Summary (2011-2028).....	23
Table 2.15	Non-Residential Building Permit Activity (2002-2006).....	29
Table 3.1	Vacant Residential Land Serviced (Urban) January 1, 2008.....	30
Table 3.2	Vacant Residential Land Unserviced (Rural Residential) January 1, 2008).....	31
Table 3.3	Vacant Residential Land Unserviced (Hamlet) January 1, 2008.....	32
Table 3.4	Vacant ICI Lands (Urban) – December 17, 2007 Commitments Demands.....	33
Table 3.5	Vacant ICI Lands (Urban) – December 17, 2007 Future Developments and Capacity Commitment Pending.....	34
Table 4.1	Units/Lots Required to Meet Projections (2011-2031).....	36
Table 4.2	Future Residential Land Requirements.....	36
Table 4.3	Projected Employment Land Needs Based on Resident Labour Force – 2028.....	38
Table 7.1	Requests for Expansion to a Settlement Area Boundary or Redesignation.....	41

**- LIST OF FIGURES -**

Figure 1	North Grenville - Land Needs Study Urban Area Plan Residential
Figure 2	North Grenville - Land Needs Study Rural Residential Area Plan
Figure 3	North Grenville - Land Needs Study Hamlet Area Plan
Figure 4	North Grenville - Land Needs Study Urban Area Plan Employment
Figure 5	North Grenville - Land Needs Study Urban Area Employment & Residential
Figure 6	North Grenville - Requests for Expansion to a Settlement Area Boundary or Redesignation – Schedule A
Figure 7	North Grenville – Requests for Expansion to a Settlement Area Boundary or Redesignation – Schedule 'B'

**OFFICIAL PLAN REVIEW 2007-2008  
LAND NEEDS BACKGROUND STUDY  
MUNICIPALITY OF NORTH GRENVILLE**

## **1.0 INTRODUCTION**

The following Report is submitted as part of the background information and material for the Official Plan Review and formal report and will form part of the Public Record. This Report is intended for review and comment by the approval authority, prescribed public bodies, Council and its Committees, and the public, as a part of the development of the revised policies for the Official Plan.

### **1.1 Study Context**

The Municipality of North Grenville has initiated a five-year review of its Official Plan (OP) as mandated by the Province under the provisions of Section 26(1) of the *Planning Act*. The last Official Plan review was conducted in 1998-99. The current Official Plan received Ministerial Approval on May 11, 2000 and came into effect on June 2, 2000. The Municipality of North Grenville retained the planning services of J.L. Richards & Associates Limited to assist with the update and revision to the Official Plan to reflect changes in Provincial Policy and Planning Act amendments.

According to the Provincial Policy Statement 2005, (PPS) the determination of land requirements to accommodate growth must be justified on the basis of population and growth projections, including employment targets and residential and non-residential projections. The analysis needs to also consider growth through intensification and redevelopment opportunities, as well as infrastructure and public service facilities available in the municipality over the 20-year planning period.

The policies of local planning jurisdictions must now be "consistent with" Provincial policy. The PPS provides clear criteria that must be addressed before considering expansions to the boundary of settlement areas (*designated growth areas*). There is a stronger emphasis on growth management, phasing policies that ensure the orderly progression of development within designated growth areas, and the need to fully consider growth opportunities within currently designated growth areas.

It is intended that the analysis contained within this report will meet the requirements set out in the PPS (1.1.2), which states that:

"Sufficient land shall be made available through *intensification* and *redevelopment* and, if necessary, *designated growth areas*, to accommodate an appropriate range and mix of employment opportunities, housing and other land uses to meet projected needs for a time horizon of up to 20 years."

The PPS also makes reference to municipalities maintaining a minimum supply of land for 10 years of growth. Section 1.4.1 states that "...planning authorities shall:

- a) maintain at all times the ability to accommodate residential growth for a minimum of 10 years through *residential intensification* and *redevelopment* and, if necessary, lands which are *designated and available* for residential development; and
- b) maintain at all times where development is to occur, land with servicing capacity sufficient to provide at least a 3 year supply of residential units available through lands suitably zoned to facilitate *residential intensification* and *redevelopment*, and land in draft approved and registered plans."

*Intensification* consists of the development of a property, site or area at a higher density than currently exists. This can be achieved either through *redevelopment*, including the reuse of *brownfield sites*, development of vacant and/or underutilized lots within previously developed areas, and the expansion or conversion of existing buildings.

*Redevelopment* consists of the creation of new units, uses or lots on previously developed land, including *brownfield sites*.

*Brownfield sites* means undeveloped or previously developed properties that may be contaminated. They are usually, but not exclusively, former industrial or commercial properties that may be underutilized, derelict or vacant.

*Designated growth areas* means lands within *settlement areas* designated in the Official Plan for growth over the long-term planning horizon (20 years), but which have not yet been fully developed.

*Residential intensification* means intensification of a property, site or area which results in a net increase in residential units or accommodation and includes:

- a) redevelopment, including the redevelopment of *brownfield sites*;
- b) the development of vacant or underutilized lots within previously developed areas;
- c) infill development;
- d) the conversion or expansion of existing industrial, commercial and institutional buildings for residential use; and

- e) the conversion or expansion of existing residential buildings to create new residential units or accommodation, including accessory apartments, secondary suites and rooming houses.

*Designated and available* means lands designated in the Official Plan for urban residential use.

*Settlement area* means the urban area and rural settlement areas within the municipality that are built up areas where development is concentrated and which have a mix of land uses, and lands which have been designated for development.

There is now a clear onus on municipalities to demonstrate that expansions are required to a *settlement area* in order to meet the forecast for land requirements during the planning period.

The entire Secondary Plan Area (Schedule B), Kemptville, is considered to be a *settlement area* as lands are designated for urban growth over the long-term planning horizon. In addition, eQuinelle (formerly known as Oxford Landing), has been designated in the Official Plan for development over the long term planning horizon as a part of the lands to have full municipal services.

North Grenville has several rural settlement areas designated as Hamlets on Schedule A, which include: Bedell, Bishops Mills, Burritts Rapids, East Oxford, Heckston, Oxford Mills, Oxford Station, and Peltons Corners. North Grenville also has several rural settlement areas in Rural Residential designations, shown on Schedules A and B.

Consistent with the PPS, an expansion of a *settlement area* must be rationalized through a *comprehensive review*. The analysis must consider population and growth projections; intensification and redevelopment opportunities; the availability of infrastructure and public health facilities that are available or planned for the area; the consideration of alternatives that avoid development in prime agricultural areas; and consideration of cross-jurisdictional issues.

## 1.2 Study Objectives

- The 2005 Provincial Policy Statement (PPS) will be reviewed as it directly and indirectly relates to land needs, in particular, Section 1.1.3 (Settlement Areas).
- Formulation of revised policies that may be required in the Official Plan to ensure consistency with the provisions of the PPS will occur as part of the Official Plan Review.

- Review and update forecasts for population, housing, employment and non-residential land requirements.
- Review past development patterns and trends relating to usage of residential and non-residential lands in the Municipality.
- Review actual use of land based on CD-OASYS and observable characteristics.
- Determine if there are sufficient lands within designated growth areas and lands designated and available throughout the Municipality to meet PPS.

## 2.0 GROWTH PROJECTIONS (DEMAND)

The foundation of this Land Needs Analysis are the population, households and housing, and employment projections for the twenty-year planning period. Projections have been made up to the year 2028 in accordance with the PPS.

The data used in the following analysis is based in part on the 1998 Growth and Settlement Report prepared by Ainley Graham and Associates, the Projection Methodology Guideline prepared by the Ministry of Municipal Affairs and Housing, the 2002 Ottawa Regional Analysis prepared by the Ministry of Municipal Affairs and Housing, the 2007 Ontario Population Projections prepared by the Ministry of Finance, Statistics Canada, building permit and lot creation activity across the Municipality, the 2004 United Counties of Leeds and Grenville Affordable Housing Study, and other research materials:

The first section of the Report deals with population projections.

The second section deals with households and housing. Projected household formation and associated housing requirements by dwelling unit type. First, household projections are produced using historic headship rates. Housing needs are then estimated by applying the proportion within each household age group who occupy single detached housing, multiples (semi-detached and townhouses), and apartments. This was based on the 2001 Census, since results for the 2006 Census were not available.

The third section deals with employment. Projections of employment are based on the population projection.

The document is intended to assist in implementation of the reforms to the planning system. These forecasts were prepared using the best information and data available at the time of preparation and are only an informed estimation of the future. Such an estimation involves an

understanding of past trends, growth patterns, established demographic and market constraints, and a knowledge of changes that are taking place, or likely to take place in the future. They are not, however, accurate predictions of the future.

## **2.1 Regional Analysis**

The Municipality of North Grenville was created on January 1, 1998 following an amalgamation of the Town of Kemptville, Township of South Gower, and the Township of Oxford. North Grenville is part of the United Counties of Leeds and Grenville and is located immediately south of the City of Ottawa. The municipality is west of the Township of North Dundas, east of the Township of Merrickville-Wolford and north of the Townships of Augusta and Edwardsburgh/Cardinal. According to the 2001 Census, 43.7 % of the resident labour force works outside of the Municipality.

## **2.2 Population Growth Trends**

The Municipality of North Grenville has seen strong population growth over the past twenty years and has increased its share of the Leeds and Grenville population from 10.2% to 14.96% over this time period. This reflects strong residential development activity across the Municipality in recent years, largely serving commuters working in the Ottawa area in employment centres such as the Kanata North Business Park.

Now that Highway 416 is just over five years old, the Municipality of North Grenville is beginning to experience stronger growth pressures. Between 2002 and 2007, there were 580 housing starts in North Grenville. The number of residential units demolished between 2002 and 2007 was 28 demolitions; therefore, an average of 92 units per year.

## **2.3 Population Projections**

According to the Ministry of Municipal Affairs and Housing's "Projection Methodology Guideline", where upper-tier planning does not exist, local municipalities need to proceed on their own, ideally through a "shares" approach. With this method, a Municipality looks at its past shares of the County population and determines whether this has been rising or falling. The expected future share is then applied to the Ministry of Finance projections for the County.

The Ontario Ministry of Finance prepares population projections for the province as a whole and for the various counties, districts and regional municipalities. This report entitled, "Ontario Populations Projections Update, 2006-2031", presents population projections for Ontario and each of its 49 Census Divisions from the base year of 2006 to 2031. These projections track, in

the short term, the most recent trends in components of population growth, as well as the latest annual population estimates available from Statistics Canada.

The updated population projections use as their base population the preliminary July 1, 2006 post-censal population estimates released by Statistics Canada in January 2007 for Census Divisions. Note, the recently released 2006 Census counts need to be adjusted for net undercoverage by Statistics Canada (available in Fall 2008).

These population projections are not policy targets or desired population outcomes, nor do they incorporate explicit economic assumptions. The Ministry's assumptions for population growth reflect past trends in all streams of migration and the continuing evolution of long-term fertility and mortality patterns in each Census Division. Population has been projected for the United Counties of Leeds and Grenville.

As shown in Table 2.1, the Municipality's past shares of the County's population, according to past Censuses, has increased by around .5% per five-year increments, even following the completion of Highway 416. If we assume this trend to continue, this would represent an average yearly growth of 1.39% - a fairly conservative growth rate.

**Table 2.1: Historical and Projected Population for the United Counties of Leeds and Grenville and the Municipality of North Grenville, Five-Year Increments, 1996-2031**

	Historical			Projected				
	1996	2001	2006	2011	2016	2021	2026	2031
<b>United Counties of Leeds and Grenville<sup>1</sup></b>	98,900	100,300	102,900	104,700	107,400	110,400	113,200	115,400
<b>Municipality of North Grenville<sup>1,2</sup></b>	12,648	13,581	14,198	14,972	15,895	16,891	17,886	18,810
<b>% share<sup>3</sup></b>	12.79%	13.54%	13.80%	14.30%	14.80%	15.30%	15.80%	16.30%
Notes:								
1. Sources: Statistics Canada, 1996 to 2006, and projections of Ontario Ministry of Finance								
2. Prior to 2001 Census (amalgamation).								
3. "Shares" based on average of past shares of the County's population.								

Using the past "shares" approach is probably not the best approach, as North Grenville is expected to grow at a faster rate than other municipalities in the United Counties of Leeds and Grenville; therefore, representing a larger (future) share of the County's population. If we

simply look at building permits issued in 2007, the percentage increase between 2006 and 2007 was approximately 1.96% and is expected to continue to rise.

Table 2.2 presents population projections for the Township prepared by the Ministry of Municipal Affairs and Housing (MMAH) in 2002. MMAH had projected growth in North Grenville to be extremely strong. Looking back at these numbers, the Ministry's projections have overestimated population growth in the Municipality. Housing activity has increased in the past few years, but not to the extent required to support the rapid growth suggested by the MMAH projections. However, what is interesting is, apart from the overestimated population growth, the average median growth was projected at around 3% per year.

**Table 2.2 Historical and Projected Population for the Municipality of North Grenville, based on Ottawa Regional Analysis: MMAH, 2002 (Five-Year Increments, 1996-2021)**

	Historical		Projected			
	1996	2001	2006	2011	2016	2021
<b>Municipality of North Grenville<sup>1</sup></b>	12,648	13,581	20,838	24,932	29,027	33,122
<b>Average Growth per year</b>		1.5%	10.7%	4%	3.3%	2.8%
<b>Notes:</b>						
1. Sources: Ottawa Regional Analysis: Ministry of Municipal Affairs and Housing, 2002						

Another approach is the growth rate approach, under which a municipality projects its future population based on its current population in accordance with historic growth rates. However, this method does not take into account development in surrounding municipalities. As indicated in the Regional Analysis, development (employment) in the regional context can greatly impact growth in the Municipality. According to the 1994 Growth and Settlement Report prepared by EDP Associates Ltd. and updated by Ainley Graham and Associates in 1998, population projections were based on an annual population growth rate of 3%, a similar percentage increase utilized by MMAH.

Based on building permit activity since 2001 and an average household size of 2.77, in 2001, it is our opinion that the 2006 Census of Population has greatly underscored the number of households and total population. Between 2001 and 2007 there were 667 residential building permits issued and 28 residential demolitions, for a total of approximately 639 new housing

starts. Assuming an average household size of 2.77 would represent a total population in 2006 of approximately 14 896.

Table 2.3 illustrates historical growth rate in the Municipality (pre-and post-amalgamation) which averages out to around 3% yearly growth between 1986 and 2006.

**Table 2.3: Past Growth Rates for the Municipality of North Grenville  
(Five-Year Increments)**

	Historical Growth Rates				
	1986	1991	1996	2001	2006 <sup>1</sup>
<b>Population</b>	8,597	10,197	12,648	13,581	14,896
<b>Past Growth</b>	-	18.6% or 3.7% / year	24% or 4.8% per year	7.4% or 1.5% per year	9.3 % or 1.9% per year

1. Source: 2006 population estimated based on housing starts, demolitions and average number of persons per dwelling from the 2001 Census

Table 2.4 illustrates projected population based on an averaged 3% growth rate. The average 3% growth rate, however somewhat optimistic, will serve as the basis to determine land needs over the planning horizon. Based on the projections, the population to be accommodated during the planning period (2008-2028) is approximately 12 901. The following sections will look at average household size projections in order to determine the need for housing over the planning horizon.

**Table 2.4: Projected Population for the Municipality of North Grenville  
(Five-Year Increments)**

	Estimated	Projected				
	2006 <sup>1</sup>	2011	2016	2021	2026	2028
<b>Projected Growth Scenario (3% per year)</b>	14,896	17,345	20,108	23,310	27,023	28,668

1. Source: 2006 population estimated based on housing starts, demolitions and average number of persons per dwelling from the 2001 Census

## 2.4 Housing Demand

Household projections are based on the fact that housing choices differ from people in different age groups and that, as people age, these choices evolve in a fairly predictable pattern.

Table 2.5 presents projected population by age group in North Grenville using the 2006 Statistics Canada information as a basis. While factors such as household composition, affordability, culture/lifestyle, and location can influence household demand, age is by far the most important factor. Analysis of these factors and related trends can help predict potential changes in housing formation, demand for certain types of dwellings, household size, and their impact on future housing demand projections.

**Table 2.5: Population Projection by Age Group, North Grenville**

Population	Projections				
	2011	2016	2021	2026	2028
0 to 4 years	867	1,005	1,166	1,351	1,433
5 to 14 years	2,255	2,413	2,797	3,243	3,440
15 to 19 years	1,214	1,408	1,166	1,351	1,433
20 to 24 years	694	804	932	811	860
25 to 34 years	1,735	2,212	2,564	2,702	3,010
35 to 44 years	2,602	3,016	3,497	3,783	4,014
45 to 54 years	3,296	3,619	3,730	4,053	4,157
55 to 64 years	2,428	2,614	3,263	3,783	3,440
65 to 74 years	1,388	2,011	2,797	3,513	4,014
75 to 84 years	694	804	1,166	1,892	2,293
85 years +	173	201	233	540	573
<b>Total</b>	<b>17,345</b>	<b>20,108</b>	<b>23,310</b>	<b>27,023</b>	<b>28,668</b>

Notes:  
Source: Based on 2006 Census (adjusted) and projections listed in Table 2.4. Shares per age group are based on projections of Ontario Ministry of Finance for the County.

The projections show that the population age 65 and over is expected to increase from 12.2% in 2006 to 24% by 2028. This means that one of every four persons living in the Municipality in 2031 is expected to be a "senior." These forecasts provide further evidence of the need to pay particular attention to forms of housing suited to seniors.

### 2.4.1 Headship Rates

In order to convert a population projection into a projection of households, a household "headship rate" must be formulated for each age group in the population. The headship rate is the proportion of the number of people in a given age group who are household maintainers.

The Census dictionary defines a household maintainer as the person who is responsible for the major payments (rent, mortgage, taxes, electricity, etc.) for the dwelling. The headship rate serves as an indicator for the propensity of people in a given age group to form separate households.

Generally, headship rates are lower for younger persons and increase as these persons move into employment and child-bearing stages of life where they are able to form individual households. Headship rates also become progressively higher as individuals age, until the latter stages of life, when they again decrease, typically as a result of seniors moving into nursing/retirement homes or other arrangements where they are no longer responsible for an individual household.

Data obtained for the Municipality of North Grenville from Statistics Canada regarding household maintainers by age groups and the resulting headship rates for 2006 reflect this general pattern, as shown in Table 2.6.

**HOUSEHOLD MAINTAINERS / POPULATION = HEADSHIP RATE**

**Table 2.6: Household Maintainers, Population and Headship Rates by Age, 2006**

	Household Maintainers	Population	Headship Rates
<b>Under 25 years</b>	90	4,430	0.02
<b>25-34 years</b>	635	1,405	0.45
<b>35-44 years</b>	1,295	2,465	0.53
<b>45-54 years</b>	1,340	2,485	0.54
<b>55-64 years</b>	880	1,665	0.53
<b>65-74 years</b>	560	940	0.60
<b>75 years +</b>	450	800	0.56

*Source: 2006 Census of Population – Statistics Canada*

As can be seen, the headship rates rise significantly for each age group after the “under 25 years” age group. After that, they rise more slowly, until peaking in the “65-74 years” age group. The decline after age 75 reflects the movement of people into extended families, nursing homes and other care facilities.

These are the rates calculated from the most recent Census (2006). The use of “constant” headship rates is one of the simplifying assumptions underlying this projection methodology (Province of Ontario, Projection Methodology Guideline, 1995). This can be justified given the stability that overall headship rates tend to exhibit over time. The proposed methodology

captures the most important factors driving future housing needs – namely, the growth and changing age structure of the population.

Once a headship rate for each age group has been calculated, the projected population is multiplied by the headship rate to determine the total number of households for any benchmark year within the planning time frame.

***POPULATION X HEADSHIP RATE = PROJECTED HOUSEHOLDS***

Table 2.7 illustrates the household projections to the year 2028 using the population projection from Tables 2.4 and 2.5 and a “constant” headship rate, as illustrated in Table 2.6. Population growth and changes in the age structure of the population are the two main factors that drive household growth. Other factors, such as affordability and changing lifestyles choices, also affect household growth, but the impact tends to be less.

**Table 2.7: Household Projections, 2011-2028  
Census Data (2006) and Projections (2011 to 2028)**

	2006	2011	2016	2021	2026	2028
<b>Population by Age</b>						
<b>Under 25 years</b>	4,430	5,030	5,630	6,061	6,756	7,167
<b>25-34 years</b>	1,405	1,735	2,212	2,564	2,702	3,010
<b>35-44 years</b>	2,465	2,602	3,016	3,497	3,783	4,014
<b>45-54 years</b>	2,485	3,296	3,619	3,730	4,053	4,157
<b>55-64 years</b>	1,665	2,428	2,614	3,263	3,783	3,440
<b>65-74 years</b>	940	1,388	2,011	2,797	3,513	4,014
<b>75 years +</b>	800	867	1,005	1,399	2,432	2,866
<b>Total</b>	<b>14 190</b>	<b>17 346</b>	<b>20 107</b>	<b>23 311</b>	<b>27 022</b>	<b>28 668</b>
<b>Household Headship Rates (*remains constant)</b>						
<b>Under 25 years</b>	0.02	0.02	0.02	0.02	0.02	0.02
<b>25-34 years</b>	0.45	0.45	0.45	0.45	0.45	0.45
<b>35-44 years</b>	0.53	0.53	0.53	0.53	0.53	0.53
<b>45-54 years</b>	0.54	0.54	0.54	0.54	0.54	0.54
<b>55-64 years</b>	0.53	0.53	0.53	0.53	0.53	0.53
<b>65-74 years</b>	0.60	0.60	0.60	0.60	0.60	0.60
<b>75 years +</b>	0.56	0.56	0.56	0.56	0.56	0.56

<b>Projected Households by Age of Head</b>						
<b>Under 25 years</b>	89	101	113	121	135	143
<b>25-34 years</b>	632	781	995	1,154	1,216	1,355
<b>35-44 years</b>	1,306	1,379	1,598	1,853	2,005	2,127
<b>45-54 years</b>	1,342	1,780	1,954	2,014	2,189	2,245
<b>55-64 years</b>	882	1,287	1,385	1,729	2,005	1,823
<b>65-74 years</b>	564	833	1,207	1,678	2,108	2,408
<b>75 years +</b>	448	486	563	783	1,362	1,605
<b>Total</b>	<b>5 264</b>	<b>6 645</b>	<b>7 816</b>	<b>9 334</b>	<b>11 019</b>	<b>11 707</b>

#### 2.4.2 Household Demand Propensities

Household demand propensity is a term used to describe the demand for certain types of housing by people within various age groups. For example, young adults are more likely to choose to live in apartments or row dwellings, whereas those in their 30s and 40s with families have a higher "propensity" for choosing single family residences. Consequently, household

demand propensities tend to change over a person's lifespan. This is generally a result of both lifestyle preference and affordability.

Analysis of these propensities, in context with population projections by age group, helps to predict the number of housing units by type of dwelling structure that will be required for specific periods in time. This information, combined with an analysis of available housing and land, is used to approximate the amount of land that will be required to accommodate a growing population.

Information regarding dwelling choice tendencies by age group for North Grenville was obtained through the 2006 Census. Household demand propensities for individual age groups are generally assumed to be relatively stable, according to CMHC findings and methodology. Household demand propensities by age group for various dwelling types in North Grenville are provided in Table 2.8. These proportions are assumed to remain constant throughout the twenty-year projection period.

**Table 2.8: Structural Type of Dwelling by Age Groups, 2006 Census**

Structural type of dwelling	Age groups of primary household maintainer							Total
	< 25 years	25 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years	65 to 74 years	> 75 years	
Single-detached house	30	500	1,125	1,210	770	470	360	4,470
Semi-detached house	10	40	75	50	25	35	25	255
Row house	15	30	45	40	20	10	20	180
Apartment, Duplex	0	10	0	10	10	0	0	35
Apartment < 5 storeys	35	45	35	20	25	30	40	230
Apartment > 4 storeys	0	0	0	0	0	0	0	0
<b>Total</b>	<b>90</b>	<b>640</b>	<b>1,290</b>	<b>1,335</b>	<b>875</b>	<b>560</b>	<b>445</b>	<b>5,240</b>

Source: Statistics Canada, 2006 Census of Population.

As can be expected, the tendency to live in single family dwellings increases substantially as individuals enter their 30s, and stays relatively strong for the duration of the lifespan. Low density residential (single, semi, and duplex) accounts for approximately 91% of dwelling types. With regard to apartment dwellers, it is noted that there is a slightly higher propensity to live in apartments by younger age groups as well as for older persons.

Household demand propensities can also be divided between owned and rented dwellings. According to the 2006 Census of Population released by Statistics Canada, in North Grenville, there were 4,600 owned dwellings and 640 rented dwellings. However, the most important aspect of housing demand is the total number of dwellings that are projected to be needed over the twenty-year time span, rather than the form of tenure.

### 2.4.3 Household Size and Composition

Demand is also influenced by household size and composition. In recent years, the rate of population growth has exceeded the rate of household formation, as shown in Table 2.9. This is a reflection of the movement of family-oriented households to the area, many of whom are commuters working in the Ottawa area. At the same time, while the Municipality continues to mature, household composition will become more diversified and the need for a greater range of housing will grow.

The following factors affect housing demand and it is expected that the rate of housing formation will exceed the rate of population growth:

- Declining birth rates;
- An increase in the number of households consisting of single persons, lone parent families and couples without children;
- A greater number of seniors with fewer of them living in health care institutions.

**Table 2.9: Household Size and Composition Trends**

Factor	1996	2001	2006
Total Population	12,648	13,581	14,896
Population Growth		933	1,315
Percentage Change		7.4%	9.6%
Total Households	4,517*	4,905	5,361
Household Growth		388	456
Percentage Change		8.6%	9.3%
Average Household Size	2.8	2.77	2.77

\* Estimated for 1996 based on average household size and Statistics Canada, 2001, and estimated for 2006 based on housing starts, demolitions and avg. household size and headship rates.

The average household size in North Grenville is estimated to be around 2.77 (persons per household) slightly higher than the average household size for Ottawa, which was estimated at 2.48 in 2006. North Grenville has and will continue to attract and retain young families. The municipality can expect an increase in the demand for affordable starter homes such as semis and row dwellings. Furthermore, as the population ages, we can expect a trend towards an increase in the number of single person households and a shift to smaller housing types, e.g. two-bedroom single detached (bungalows), condominiums, semis, townhouses and apartment units.

As shown above, average household size has remained fairly constant. Based on projections shown in Table 2.7, a decline is expected. This is primarily due to the continued aging of the population. This decline will be tempered by the growing number of families moving into the North Grenville area. Thus, the overall decline in average household size for the Municipality should slow down in the future. Average household sizes are projected in Table 2.10.

**Table 2.10: Household Size, North Grenville, 2006-2031**

	Estimated	Projected				
	2006 <sup>1</sup>	2011	2016	2021	2026	2028
<b>Population</b>	14,896	17,345	20,108	23,310	27,023	28,668
<b>Number of Households</b>	5,361	6,645	7,816	9,334	11,019	11,707
<b>Household Size</b>	2.77	2.61	2.57	2.50	2.45	2.45

*1. Source: 2006 population estimated based on housing starts, demolitions and average household size from 2001 Census*

#### 2.4.4 Housing Demand Preferences

Housing demand preferences are a function of lifestyle and economic factors, as well as personal values. There is a strong preference for single family detached housing in North Grenville. The existing housing stock is made up of approximately 85% singles. This preference is consistent with national and provincial trends. However, with an aging population, it is anticipated that there will be an increased demand in the future for alternate forms of housing that minimize maintenance responsibilities, particularly for owned apartments and condominiums by those in their retirement age.

It should be noted that, in this Report, any references to low, medium and high density are distinguished on the following assumptions:

- Low density refers to single family detached dwellings, semi-detached or duplex dwellings;
- Medium density refers to triplex, fourplex, row house dwellings, low-rise apartment (less than five units) dwellings;
- High density refers to apartment buildings (more than five units).

**Table 2.11: Residential Building Permit Activity (2001-2007)**

Year	Town of Kemptville	Township of South Gower	Township of Oxford	Total Units	Average Construction Value of Dwelling (\$)
2001	-	-	-	87	\$141,830
2002	-	-	-	104	\$158,366
2003	-	-	-	92	\$163,263
2004	-	-	-	98	\$185,515
2005	15	39	37	91	\$197,999
2006	21	20	51	92	\$191,682
2007	-	-	-	103	\$172,555
<b>% of Total</b>	<b>20%</b>	<b>32%</b>	<b>48%</b>	<b>667</b>	<b>Avg. \$173,030</b>

*Source: Municipal Building Department Records*

Recent building construction patterns indicate a preference for low density single detached dwellings. Furthermore, the majority of new constructions are outside of the urban area and within Rural Residential subdivisions. The average construction value (2001-2007) of a single detached was approximately \$173,030.

#### 2.4.5 Housing Affordability

Section 1.4 of the Provincial Policy Statement, 2005 (PPS, 2005) requires planning authorities to provide for an appropriate range of housing types and densities to meet projected requirements of current and future residents. This will require policies to establish and implement affordable housing targets.

The Ministry of Municipal Affairs and Housing, Market Housing Branch, has provided information about affordable house prices and rents by regional market areas (United Counties of Leeds and Grenville) to assist in implementing Section 1.4 of the PPS.

#### 2.4.5.1 Ownership Housing

Section 1.4.3 (a) of the PSS reads: "Establishing and implementing minimum targets for the provision of housing which is *"affordable to low and moderate income households."*

What is *"low and moderate income households"* according to the Provincial Policy Statement 2005?

In the case of ownership housing, *"low and moderate income households"* are households with incomes in the lowest 60 percent of the income distribution for the regional market area. In 2006, the household income for the 60<sup>th</sup> percentile in the United Counties of Leeds and Grenville was \$65,100 and the affordable house price was \$219,500. (Source – MMAH, Market Housing Branch, Information Bulletin October 2006).

In the case of ownership housing in North Grenville, *low and moderate income households* are those households with incomes below \$65,100. The average family is within the low to moderate income bracket for ownership housing as the median household income, 2000 (all households) was \$58,727.

What is *"affordable"* according to the Provincial Policy Statement 2005?

In the case of ownership housing, the least expensive of:

housing for which the purchase price results in annual accommodation costs which do not exceed 30 percent of gross annual household income *for low and moderate income households*; or

housing for which the purchase price is at least 10 percent below the average purchase price of a resale unit in the regional market area.

*Low and moderate income households* are those households with incomes below \$65,100 and the affordable house price is \$219,500. (Source – MMAH, Market Housing Branch, Information Bulletin October 2006). This purchase price would result in annual accommodation costs that do not exceed 30 percent of gross annual household income for low and moderate income.

According to the MMAH, Market Housing Branch, and based on Canadian Real Estate Board MLS data for 2005, the average resale house price for 2006 in the United Counties of Leeds and Grenville was \$146,000 and 10% below average resale price would then be \$131,400.

In the case of ownership housing in North Grenville, the least expensive would be \$131,400.

What is "*affordable to low and moderate income households*"?

Housing that is *affordable to low and moderate income households* is considered to be homes below \$131,400. The average construction value of a dwelling in North Grenville was estimated to be \$172,537 in 2006, which is above the affordability criteria for *low and moderate income households*. For North Grenville, this number might not be realistic as it factors in the purchase price for the regional market area which includes smaller municipalities such as Athens, Augusta, Edwardsburg-Cardinal, Elizabethtown-Kitley, Front of Yonge, Leeds and the Thousand Islands, Merrickville-Wolford, Rideau Lakes, Westport, Gananoque, and Prescott.

However, according to the 2001 Census for North Grenville, the median household income, 2000 (all households) was \$58,727 and the purchase price, which would result in annual accommodation costs that do not exceed 30 percent of gross annual household income, would be \$198,056 (based on 2001 incomes).

#### 2.4.5.2 Rental Housing

Section 1.4.3.(a) of the PSS reads: "Establishing and implementing minimum targets for the provision of housing which is *affordable to low and moderate income households*."

What is "*low and moderate income households*" according to the Provincial Policy Statement 2005?

In the case of rental housing, "*low and moderate income households*" are households with incomes in the lowest 60 percent of the income distribution for renter households for the regional market area. The renter household income for the 60<sup>th</sup> percentile in the United Counties of Leeds and Grenville was \$36,800, and the affordable rent price was \$920 (Source – MMAH, Market Housing Branch, Information Bulletin October 2006).

What is "*affordable*" according to the Provincial Policy Statement 2005?

In the case of rental housing, the least expensive of:

a unit for which the rent does not exceed 30 percent of gross annual household income for low and moderate income households; or

a unit for which the rent is at or below the average market rent of a unit in the regional market area.

The renter household income for the 60<sup>th</sup> percentile in the United Counties of Leeds and Grenville was \$36,800, and the affordable rent price (rent which does not exceed 30 percent of gross annual household income for low and moderate income households) was \$920 (Source – MMAH, Market Housing Branch, Information Bulletin October 2006).

According to a Rental Market Survey, 2006, Canada Mortgage and Housing Corporation, the average market rent for apartments in the United Counties of Leeds and Grenville was \$614.

In the case of rental housing in North Grenville, *low and moderate income households* are those households with incomes below \$36,800 and an *affordable* rent would be under \$614.

#### 2.4.5.3 Ottawa Real Estate Board Statistics

The following table provides statistics from the Ottawa Real Estate Board.

**Table 2.12: Residential Sales (2006-2008)**

<b>Sold Date</b>	<b>Township of Kemptville</b>	<b>Township of South Gower</b>	<b>Township of Oxford-on-Rideau</b>
<b>between 1/1/2006 - 12/31/2006</b>	High Sale Price: \$320,000 Low Sale Price: \$95,000 Avg. Sale Price: \$184,057	High Sale Price: \$570,000 Low Sale Price: \$100,000 Avg. Sale Price: \$242,383	High Sale Price: \$549,900 Low Sale Price: \$36,000 Avg. Sale Price: \$238,891
<b>between 1/1/2007 - 12/31/2007</b>	High Sale Price: \$369,900 Low Sale Price: \$69,900 Avg. Sale Price: \$200,657	High Sale Price: \$377,000 Low Sale Price: \$139,000 Avg. Sale Price: \$239,783	High Sale Price: \$500,000 Low Sale Price: \$15,000 Avg. Sale Price: \$238,479
<b>1/1/2008 – 4/16/2008</b>	High Sale Price: \$337,500 Low Sale Price: \$108,000 Avg. Sale Price: \$202,350	High Sale Price: \$415,000 Low Sale Price: \$179,000 Avg. Sale Price: \$254,450	High Sale Price: \$470,500 Low Sale Price: \$63,000 Avg. Sale Price: \$286,912

Source: Ottawa Real Estate Board, April 16, 2008

According to the MLS data homes are generally less expensive in the former Township of Kemptville. Although there have been homes sold below the "affordable" amount, the average sale price is higher than what is considered to be affordable to "low and moderate income households."

## 2.5 Projected Housing Demand

Housing demand projections were prepared by applying the foregoing headship rates and housing demand propensities to the population projections provided in Table 2.4 of this Report. These population projections, combined with the headship rates and housing propensity assumptions, result in a demand for a total of 6,249 dwelling units by 2028, with dwelling type categories per age group, as shown in the following tables. As the community matures and infrastructure expands, we can expect an increase in the magnitude of housing activity.

**Table 2.13: Projected Housing Demand**

Structural Type of Dwelling by Age Group, 2006 Census								
Structural Type of Dwelling	Age groups of primary household maintainer							Total
	Under 25 years	25 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years	65 to 74 years	75 years and over	
Single-detached house (including mobile homes)	40	500	1,115	1,210	805	480	360	4,510
Semi-detached house	0	40	75	50	25	35	25	250
Apartment Duplex	0	10	0	10	10	0	0	30
Row house	15	30	45	40	20	10	20	180
Apartment < 5 storeys	35	45	35	20	25	30	40	230
Apartment > 5 storeys	0	0	0	0	0	0	0	0
<b>Total</b>	<b>90</b>	<b>625</b>	<b>1,270</b>	<b>1,330</b>	<b>885</b>	<b>555</b>	<b>445</b>	<b>5,200</b>

<b>Housing Demand Projection 2011</b>								
<b>Structural Type of Dwelling</b>	<b>Age groups of primary household maintainer</b>							<b>Total</b>
	<b>Under 25 years</b>	<b>25 to 34 years</b>	<b>35 to 44 years</b>	<b>45 to 54 years</b>	<b>55 to 64 years</b>	<b>65 to 74 years</b>	<b>75 years and over</b>	
<b>Single-detached house (including mobile homes)</b>	45	625	1,211	1,619	1,171	720	393	<b>5,784</b>
<b>Semi-detached house</b>	0	50	81	67	36	53	27	<b>315</b>
<b>Apartment Duplex</b>	0	12	0	13	15	0	0	<b>40</b>
<b>Row house</b>	17	37	49	54	29	15	22	<b>223</b>
<b>Apartment &lt; 5 storeys</b>	39	56	38	27	36	45	44	<b>285</b>
<b>Apartment &gt; 5 storeys</b>	0	0	0	0	0	0	0	<b>0</b>
<b>Total</b>	<b>101</b>	<b>781</b>	<b>1,379</b>	<b>1,780</b>	<b>1,287</b>	<b>833</b>	<b>486</b>	<b>6,647</b>

<b>Housing Demand Projection 2016</b>								
<b>Structural Type of Dwelling</b>	<b>Age groups of primary household maintainer</b>							<b>Total</b>
	<b>Under 25 years</b>	<b>25 to 34 years</b>	<b>35 to 44 years</b>	<b>45 to 54 years</b>	<b>55 to 64 years</b>	<b>65 to 74 years</b>	<b>75 years and over</b>	
<b>Single-detached house</b>	50	796	1,403	1,778	1,260	1,044	455	<b>6,786</b>
<b>Semi-detached house</b>	0	64	94	73	39	76	32	<b>378</b>
<b>Apartment Duplex</b>	0	16	0	15	16	0	0	<b>46</b>
<b>Row house</b>	19	48	57	59	31	22	25	<b>260</b>
<b>Apartment &lt; 5 storeys</b>	44	72	44	29	39	65	51	<b>344</b>
<b>Apartment &gt; 5 storeys</b>	0	0	0	0	0	0	0	<b>0</b>
<b>Total</b>	<b>113</b>	<b>995</b>	<b>1,598</b>	<b>1,954</b>	<b>1,385</b>	<b>1,207</b>	<b>563</b>	<b>7,815</b>

<b>Housing Demand Projection 2021</b>								
<b>Structural Type of Dwelling</b>	<b>Age groups of primary household maintainer</b>							<b>Total</b>
	<b>Under 25 years</b>	<b>25 to 34 years</b>	<b>35 to 44 years</b>	<b>45 to 54 years</b>	<b>55 to 64 years</b>	<b>65 to 74 years</b>	<b>75 years and over</b>	
Single-detached house	54	923	1,627	1,832	1,573	1,451	633	<b>8,093</b>
Semi-detached house	0	74	109	76	49	106	44	<b>458</b>
Apartment Duplex	0	18	0	15	20	0	0	<b>53</b>
Row house	20	55	66	61	39	30	35	<b>306</b>
Apartment < 5 storeys	47	83	51	30	49	91	70	<b>421</b>
Apartment > 5 storeys	0	0	0	0	0	0	0	<b>0</b>
<b>Total</b>	<b>121</b>	<b>1,154</b>	<b>1,853</b>	<b>2,014</b>	<b>1,729</b>	<b>1,678</b>	<b>783</b>	<b>9,332</b>

<b>Housing Demand Projection 2026</b>								
<b>Structural Type of Dwelling</b>	<b>Age groups of primary household maintainer</b>							<b>Total</b>
	<b>Under 25 years</b>	<b>25 to 34 years</b>	<b>35 to 44 years</b>	<b>45 to 54 years</b>	<b>55 to 64 years</b>	<b>65 to 74 years</b>	<b>75 years and over</b>	
Single-detached house (including mobile homes)	60	973	1,760	1,991	1,824	1,823	1,102	<b>9,533</b>
Semi-detached house	0	78	118	82	57	133	77	<b>545</b>
Apartment Duplex	0	19	0	16	23	0	0	<b>59</b>
Row house	23	58	71	66	45	38	61	<b>362</b>
Apartment < 5 storeys	53	88	55	33	57	114	122	<b>521</b>
Apartment > 5 storeys	0	0	0	0	0	0	0	<b>0</b>
<b>Total</b>	<b>135</b>	<b>1,216</b>	<b>2,005</b>	<b>2,189</b>	<b>2,005</b>	<b>2,108</b>	<b>1,362</b>	<b>11,020</b>

<b>Housing Demand Projection 2028</b>								
<b>Structural Type of Dwelling</b>	<b>Age groups of primary household maintainer</b>							<b>Total</b>
	<b>Under 25 years</b>	<b>25 to 34 years</b>	<b>35 to 44 years</b>	<b>45 to 54 years</b>	<b>55 to 64 years</b>	<b>65 to 74 years</b>	<b>75 years and over</b>	
<b>Single-detached house</b>	64	1,084	1,867	2,042	1,658	2,083	1,298	<b>10,097</b>
<b>Semi-detached house</b>	0	87	126	84	51	152	90	<b>590</b>
<b>Apartment Duplex</b>	0	22	0	17	21	0	0	<b>59</b>
<b>Row house</b>	24	65	75	68	41	43	72	<b>388</b>
<b>Apartment &lt; 5 storeys</b>	56	98	59	34	51	130	144	<b>571</b>
<b>Apartment &gt; 5 storeys</b>	0	0	0	0	0	0	0	<b>0</b>
<b>Total</b>	<b>143</b>	<b>1,355</b>	<b>2,127</b>	<b>2,245</b>	<b>1,823</b>	<b>2,408</b>	<b>1,605</b>	<b>11,706</b>

The number of units required by housing type has also been calculated for each five-year period, as summarized in Table 2.14.

**Table 2.14: Housing Demand Projection Summary (2011-2028)**

<b>Year</b>	<b>Single-detached</b>	<b>Semi-detached</b>	<b>Duplex</b>	<b>Row House</b>	<b>Apartment &lt; 5 storeys</b>	<b>Apartment &gt; 4 storeys</b>	<b>Projected Total</b>
<b>2011</b>	5,784	315	40	223	285	0	<b>6,647</b>
<b>2016</b>	6,786	378	46	260	344	0	<b>7,814</b>
<b>2021</b>	8,093	458	53	306	421	0	<b>9,331</b>
<b>2026</b>	9,533	545	59	362	521	0	<b>11,020</b>
<b>2028</b>	10,097	590	59	388	571	0	<b>11,705</b>

Based on our revised number of dwellings for 2006, of 5,361, and the 95 new housing starts in 2007 (103 new units minus eight demolitions), the number of households is projected to increase from 5,456 in 2007 to approximately 11,705 in 2028, a gain of 6,249 units over 20 years. This represents a total increase of dwellings in the order of 115%, or approximately 312 units per year. This annual increase is above the number of annual housing starts that has occurred since 2001 (average of 95 units per year). The ratio of different dwelling structure types also exhibits minor changes, with a slightly higher increase in the proportion of single,

detached and apartments (low-rise apartment/condominium). It can also be noted that the projected household size in 2028 will be approximately 2.45 persons. Housing activity is expected to show a fairly constant growth over the planning horizon.

The question then becomes – are there sufficient designated lands to accommodate the projected housing across the planning horizon? Factors that should be considered are as follows:

- Total available housing stock, including those units constructed since 2007;
- Vacancy rates and demolitions;
- Existing land availability within the settlement areas, including vacant residential lands, draft approved plans and registered but as yet unbuilt plans;
- Servicing and/or development constraints;
- General density assumptions/guidelines for the various categories of housing structures;
- Proportion of housing need that is expected to be met through infill and intensification.

## 2.6 Employment Projections

This section presents employment projections for the Municipality of North Grenville through to 2028 and for identifying related land requirements in accordance with the PPS.

The following policies are particularly relevant:

- 1.3.1, a) providing for an appropriate mix and range of employment (including industrial, commercial, and institutional) uses to meet long-term needs;
- 1.3.1, b) providing for opportunities for a diversified economic base, including maintaining a range and choice of suitable sites for employment uses that support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses;
- 1.3.1, c) planning for, protecting and preserving employment areas for current and future uses; and
- 1.3.1, d) ensuring the necessary infrastructure is provided to support current and projected needs.

## 2.6.1 Canada's Macroeconomic Environment

In the past 20 years, employment growth in Canada averaged 1.7 percent per year, while the overall economy has expanded by 2.9 percent. The difference is due to the contribution of increases in productivity, which contributed about 1.2 percent per annum to economic growth.

Productivity is an important factor to economic growth, particularly in the future, as the Canadian economy copes with an emerging labour shortage.

As the Canadian population ages, there will be fewer people entering the labour force to replace those retiring from it. Progressively lower birth rates in Canada over the past 40 years, alongside the impending retirement of most members of the "baby-boom" generation in the next 30 years, is contributing to this trend. This shortage can, in part, be offset through effective immigration policy.

From a macroeconomic perspective, labour shortages (or reduced growth in the available labour supply) result in a slowing of economic growth.

There is expected to be progressively higher productivity growth in Canada over the next 30 years. In general, increasing labour productivity will aid in narrowing the gap between population growth and labour force growth. Some reasons for productivity increases are as follows:

- Continued advancements in automation and other labour-saving technology;
- Innovation towards higher value-added products;
- Innovation in health care;
- Rising Canadian dollar has forced export based companies to invest in productivity in order to compete with foreign companies; and
- Macroeconomic response to a shortage of labour.

Increasing productivity will aid in coping with labour shortages, however, there may also be a slower economic growth environment, including lower production of goods and services, and a correspondingly lower rate of exports, relative to the size of the economy.

The bottom line for macroeconomic growth in Canada: slower employment growth, reaching a rate of about 0.6 percent per year by 2026 and beyond.

## **2.6.2 Ontario Macroeconomic Environment**

Ontario has been the traditional growth engine in Canada due to its well-diversified economy, ideal location in relationship to important U.S. regions, and a concentration in industries such as financial services and vehicle production.

The recent rise of the Canadian dollar has caused a rise in the price of commodities, a negative impact on manufacturing industries and has helped to shift recent economic growth to resource-rich provinces. Nonetheless, Ontario's economy has shown resilience, avoiding major losses in employment and investing in productivity to meet the new economic realities. In the long-term, Ontario's strength and integration in the North American market will continue to make it a growth leader in Canada.

## **2.6.3 North Grenville Economic Development Strategy**

The following sections (2.6.4 and 2.6.5) are, in large part, borrowed from the North Grenville Economic Development Strategy, McSweeney & Associates, Final Draft May 31, 2007.

## **2.6.4 Jobs in North Grenville**

For 2001, the retail and education sectors (a combined 29%) account for the greatest number of jobs in North Grenville, followed by health care and social assistance (accounting for 11% of the workforce). The manufacturing and accommodation and food services sectors also have a considerable percentage of the jobs (a combined 15% of the jobs). When compared to the Ontario and Canadian economies, the agriculture, retail, and education industries in North Grenville are more specialized (or concentrated) than in those two broader economies. On the other hand, manufacturing, wholesale and transportation would be considered to be "underdeveloped" in North Grenville.

## **2.6.5 Labour Force**

Labour force characteristics in North Grenville compare favourably to the Ontario average. For 2001 and 2006, North Grenville outperformed Ontario with respect to participation rates, employment rates, and unemployment rates.

With respect to highest level of schooling in 2006, North Grenville (relative to Ontario) had a smaller percentage of the population without a high school graduation certificate, and a smaller percentage of the population with some level of university education. North Grenville did, however, have a greater percentage of residents with high school, trades certificate or diploma,

or a college certificate or diploma as the highest level of education. In comparison to Ontario, the resident labour force has a large percentage of it workers employed in the following industries: agriculture; construction; transportation; professional services; health care; and public administration (regardless of where the job is located).

In 2001, there were 3,875 jobs in North Grenville, and an employed resident labour force of 6,890, therefore, there were 3,015 residents leaving North Grenville to go to work (approximately 43.7% of the resident labour force works outside of the Municipality). The majority of North Grenville residents commuting to work outside of North Grenville work in Ottawa (2,845), followed by Merrickville-Wolford (145) and Gatineau/Hull (135). Those residents not having a North Grenville workplace work in a variety of sectors outside of the area. These sectors include: construction; manufacturing; wholesale trade; retail trade; transportation and warehousing; professional, scientific and technical services; administrative and support, waste management and remediation services; health care and social assistance; accommodation and food services; other services (except public administration); and public administration.

### 2.6.6 Employment Projections for North Grenville

The methodology used to determine employment growth is based, in the first instance, on an "activity rate", which is defined as the number of jobs in a municipality divided by the number of residents. Reference has been made to the "North Grenville Economic Development Strategy", dated May 31, 2007 and prepared by McSweeney & Associates.

#### Employment Projection in terms of land needs

#### Total Employment / Total Population = Activity Rate

Municipal population projection, 2028	28,668
Activity rate in 2001 (6,890/13,581=0.51)	51%
Year 2028 employment projection	14,620 jobs
Less employment outside of the Municipality (43.7%)	6,389 jobs
Less "primary" employment	585 jobs
Less work at home (10%)	1,462 jobs
 Total jobs to be located in settlement area(s)	 6,184
 Employees per hectare (Ministry of Municipal Affairs Projection and Methodology Guidelines)	 45

---

Total hectares required to accommodate employment in the settlement area(s)	137.42
Existing hectares of employment lands in the Urban Area (assumption)	80
<b>Total additional hectares of employment lands required</b>	<b>57.42</b>

However, this assumes that approximately 43.7% of the resident labour force will continue to work outside of the Municipality. If the Municipality is successful in retaining its resident labour force, this would represent a need for approximately 200 hectares of additional employment lands.

The question then becomes – are there sufficient designated lands to accommodate the projected employment across the planning horizon? Will the Municipality be successful in retaining its resident labour force? Factors that should be considered are as follows:

- Total available Industrial, Commercial, Institutional (ICI) stock, including those units constructed since 2007;
- Vacancy rates;
- Existing land availability within the Municipality, including vacant employment lands, draft approved plans and registered but as yet unbuilt plans;
- Servicing and/or development constraints;
- General density assumptions / guidelines for the various categories of ICI structures;
- Proportion of ICI need that is expected to be met through infill and intensification.

## 2.7 Non-Residential Projections

### 2.7.1 Industrial, Commercial, Institutional (ICI) Building Permit Activity

Table 2.15 sets out the value of non-residential construction activity (new construction or additions) over the period 2001-2006 and the forecast for future activity over the period 2007-2017. According to recent building permit activity, the most active sectors have been institutional construction. There has been limited industrial construction activity. Since 2000,

the highest growth has been in the institutional sector due to investment in schools, library and a recreational centre. This surge in the institutional activity is considered an exception.

**Table 2.15: Non-Residential Building Permit Activity (2002-2006)**

Year	Commercial (\$)	Industrial (\$)	Institutional (\$)	Total (\$)
2002	548,000	10,000	3,340,016	3,898,016
2003	106,000	144,000	49,850	299,850
2004	134,500	39,900	12,123,050	12,297,450
2005	293,000	3,040,138	53,100	3,386,238
2006	3,707,500	0	1,602,950	5,310,450
<b>Total</b>	<b>4,789,000</b>	<b>3,234,038</b>	<b>17,168,966</b>	<b>25,192,004</b>
% of Total	19%	13%	68%	100%
Estimated Floor Area (sq.ft.) per year	6,958	4,692	27,859	39,509
Projected Floor Area 2007-2028	153,076	103,240	612,902	869,219
<i>Source: Municipal Records.</i>				
<i>Notes: Estimated Floor Area based on the 2006 Construction Price Indexes from Statistics Canada.</i>				
<i>Projections are based on past trends.</i>				

Based on the last five-year period, a total of 867,219 ft<sup>2</sup> of Industrial Commercial and Institutional (ICI) to the year 2028, or 39,509 ft<sup>2</sup> per year can be expected.

### 3.0 LAND SUPPLY

#### 3.1 Residential Land Supply

##### 3.1.1 Residential Development Activity

Figures 1 to 3 identify vacant residential land and intensification opportunities.

Tables 3.1 to 3.3, set out the areas either registered but not yet built or draft approved, for residential development. Of a total yield of 2,681 lots/units (2008):

- 2,101 serviced lots/units in Urban Lands (including eQuinelle);
- 633 unserviced lots/units in Rural Residential Lands; and
- 14 unserviced lots/units in Hamlet Lands

**Table 3.1: Vacant Residential Land Serviced (Urban)  
January 1, 2008**

Plan No.	Name	Pending Draft Approval or Registered	No. of Lots	No. Built On	Lots Available
1125	Applewood (Pratt/Blake)	Registered	38	26	12
15M-1	Brookside (43 sfd, 45 apts, 14 townhouses)	Registered	102	32	70
	Lofts of Market Row	Conceptual	8	0	8
	Kempton Village (Clothier Street)	Pending application	60	0	60
	eQuinelle (Oxford Landing), Phase 1	Registered	150	32	118
	<b>Subtotal</b>		<b>358</b>	<b>90</b>	<b>268</b>
	Weedmark (municipal services)	Draft approved	63	0	63
	eQuinelle (Oxford Landing) Phase 2	Draft approved	150	0	150
	eQuinelle (Oxford Landing) Phase 3	Draft approved	120	0	120
	Henderson, Comeau-Miller (Proposed - municipal services)	OPA in place	400	0	400
	Oxford Village (on municipal services)	Draft plan submitted	398	0	398
	Forbes	Conceptual	440	0	440
	Depencier-George St. (South)	Conceptual	74	0	74
	Depencier-George St. (North)	Conceptual	132	0	132
	Kitely Subdivision	Conceptual	18	0	18
	Wellington Road	Conceptual	38	0	38
	<b>Subtotal</b>		<b>1,833</b>	<b>0</b>	<b>1,833</b>
<b>Total serviced lots (potential)</b>					<b>2,101</b>

**Table 3.2: Vacant Residential Land Unserviced (Rural Residential)  
January 1, 2008**

Plan No.	Name	Pending Draft Approval or Registered	No. of Lots	No. Built On	Lots Available
1065	Cranberry Hill (Norenberg)	Registered	32	26	6
1076	Comeau	Registered	38	37	1
1080	Bergland (Norenberg)	Registered	31	29	2
1089	Kettlecreek	Registered	45	39	6
1096	Smith, Jack I-II	Registered	16	14	2
1097	Settlers Grant (VanBerlo) II/III	Registered	53	47	6
1100	Forests of South Gower	Registered	37	36	1
1103	Glen Gables I	Registered	32	26	6
1103	Glen Gables II	Registered	28	22	6
1108	Connell Farm	Registered	22	13	9
1109	Marc-Tel (Marlin/Dangerfield)	Registered	15	14	1
1113	Forests of South Gower II	Registered	14	10	4
1124	Stuckless	Registered	12	9	3
1128	Rideau Crossing (Tzakis)	Registered	38	5	33
1132	Settlers Grant (VanBerlo) IV	Registered	14	10	4
1131	Kettle Creek II	Registered	45	33	12
1133	River Run/Straby	Registered	27	17	10
1134	Victoria Park (Pelletier) III	Registered	22	3	19
15M-2	Settler's Grant 5/6 (Registration Pending)	Draft Approved	61	3	58
		<b>Subtotal</b>	<b>582</b>	<b>393</b>	<b>189</b>
	Martineau	Draft Approved	17	0	17
	Neelin Subdivision	OPA Approved	40	0	40
	Maplestone	Draft Approved	40	0	40
	Forest of South Gower IV	Pending	5	0	5
	Rideau Estates (Phase 2)	Draft approval pending	59	0	59
	Glen Gables III-IV	Reg. No Agreement	72		72
	Kettle Creek III-IV	OPA/ZBA approved	79	0	79
	Steenbaker (Stonehaven)	Draft approval pending	123	0	123
	Comeau II	OPA approved	4	0	4
	Tanager Woods III	OPA approved	5	0	5
		<b>Sub-total</b>	<b>444</b>		<b>444</b>
		<b>Total unserviced lots (potential)</b>			<b>633</b>

Source: Municipal Records – February 26, 2008. Developments listed do not include other vacant lands which are designated and zoned for residential development

**Table 3.3: Vacant Residential Land Unserviced (Hamlet)  
January 1, 2008**

Plan No.	Name	Pending Draft Approval or Registered	No. of Lots	No. Built On	Lots Available
1096	Smith, Jack I-II	Registered	16	14	2
1108	Connell Farm	Registered	22	13	9
1124	Stuckless	Registered	12	9	3
<b>Total unserviced lots</b>					<b>14</b>

Tables 3.1 to 3.3 above indicate that there are a total of 2,748 potential lots/units, in various stages of planning approval, which could be available for residential development within the Municipality. There are 2,101 potential units/lots located in the urban serviced area, 633 located in the rural residential areas and 14 in the Hamlets.

In addition, an average of 19 lots per year are created through severance. Assuming this constant, an additional 190 lots/units could be added to the supply over a ten year planning horizon and 380 lots/units over the twenty-year planning horizon.

### 3.1.2 Residential Intensification Opportunities

In accordance with the PPS, planning authorities shall identify and promote opportunities for intensification and redevelopment. Identifying potential intensification opportunities within the built-up area of the Municipality is a demanding task. Most infill and intensification-type developments occur in areas that are difficult to predict prior to their actual development. However, certain opportunities are evident throughout the built area for intensification projects. The vacant land inventory has identified a number of vacant or underutilized parcels available to support intensification (either through new development or expansion). Within the Urban Area, approximately 54 hectares of vacant or underutilized parcels are available to support intensification. According to the current Official Plan, new residential development is anticipated to occur at an average density of approximately 23 units per net hectare. Net hectare means the total land area subject to a development proposal, exclusive of roads. For the purposes of this Study, we have accounted 15% for roads. Therefore, there is a potential for 1,058 lots/units within the Kemptville Urban Area. Applewood, Lofts of Market Row, Kempten Village and Kitley Subdivision are examples of residential intensification.

In addition to the intensification opportunities within the Urban Area, several parcels within the existing Hamlet Areas have potential for intensification. There are approximately 449 hectares of either vacant or underutilized parcels available to support intensification. Based on the

Official Plan policy of 0.4 hectare lots and accounting 15% for roads and other constraints, there is a potential for 954 lots/units within the Hamlet Areas.

### 3.2 Industrial, Commercial, Institutional Vacant Land Supply

#### 3.2.1 Industrial / Commercial / Institutional Land (ICI)

In 2001, there were 3,875 jobs in North Grenville. Based on an assumed 45 employees per hectare (minus primary employment), we have assumed that there exists approximately 80 hectares of employment lands in the Kemptville Urban Area.

Figure 4 identifies employment lands and intensification opportunities.

Tables 3.4 and 3.5 set out approved and future potential for ICI developments in the urban area. This has been based on a servicing situational analysis.

**Table 3.4: Vacant ICI Lands (Urban) – December 17, 2007**  
**Commitments/Demands**

	Total ICI Land (ha)
<b>ICI Infill</b>	
Canadian Tire	4.2
Vandentillaart	1
Raina (County Road No. 43)	1.9
Ultramar Lands (County Road No. 43)	1
<b>Total ICI Infill Committed</b>	<b>8</b>
<b>Highway Commercial West</b>	
Lockwood (County Road No. 44)	0.084
Loblaws (Expansion)	0.78
3A Lands	0.93
Forbes Land	5.6
<b>Total Highway Commercial West Committed</b>	<b>7</b>
<b>Highway Commercial East (Colonnade)</b>	
TSC Store	0.22
Colonnade - Retail Project	19
<b>Total Highway Commercial East Committed</b>	<b>19</b>
<b>ICI Infill Designed</b>	<b>34</b>

**Table 3.5: Vacant ICI Lands (Urban) – December 17, 2007  
Future Developments and Capacity Commitment Pending**

	<b>Total ICI Land (ha)</b>
<b>Remaining ICI Infill</b>	<b>25.9</b>
<b>Remaining Highway Commercial West</b>	<b>46</b>
<b>Remaining Highway Commercial East</b>	<b>87</b>
<b>Remaining ICI Lands</b>	<b>158.9</b>

Based on the Land Use Inventory, we have identified approximately 151.44 hectares of vacant employment lands.

The majority of the employment lands are along Highway 416 and County Road 43. This does not list available employment lands outside of the urban serviced area.

### **3.2.2 ICI Intensification Opportunities**

Planning authorities shall identify and promote opportunities for intensification and redevelopment. Opportunities are evident throughout the designated lands that could be built upon for intensification projects. The vacant land inventory has identified a number of vacant or underutilized parcels available to support intensification (either through new development or expansion). Within the Urban Area, approximately 67.16 hectares of vacant or underutilized parcels are available to support intensification.

In addition to the Urban Area, several parcels within the existing Hamlet Areas have been identified. While there are opportunities for resource-based employment areas, these have not been identified on the Figures.

### **3.3 Land Supply**

In terms of residential land supply, there is a total of approximately 5,150 probable residential lots/units within the Urban Serviced lands, Hamlets, Rural Residential lands and through consent activity. It should be noted that potential dwelling units (not yet registered) form part of the residential land supply, as do large tracts of vacant or underdeveloped lands designated for growth over the long-term planning horizon.

In terms of employment lands (ICI), there is a total of approximately 298.6 hectares of employment lands within the Urban Service Areas. Based on a density of 45 employees per

hectare, there is a potential for 13,437 jobs within the Kemptville Urban Area. It should be noted that there are also other employment opportunities outside of the Urban Service Areas, some of which are associated with resource-based activities (i.e., aggregate, agriculture, etc). Land supply for residential and employment lands to meet growth projections are shown on Figure 5.

#### **4.0 LAND NEEDS ANALYSIS (Supply versus Demand)**

##### **4.1 Residential Supply vs. Demand – 3, 10 and 20 years**

The rate of development over the past seven years has averaged 95 units. There is committed servicing for 268 units within registered plans. If growth was to continue at this pace, there would provide sufficient housing supply for three years.

When factoring in additional intensification opportunities (infill, redevelopment) there is sufficient supply for the three year term.

Factoring in the unit yield of registered subdivisions and units on private services of 194 lots would represent a housing supply of five years. Furthermore, lands under planning applications for residential development, both urban and rural, represent a total of 2,233 proposed lots/units. This would represent an additional housing supply of approximately 24 years.

In addition, we can assume an additional:

- 57 lots over the three-year planning horizon as a result of consent,
- 190 lots over the 10-year planning horizon as a result of consent, and
- 380 lots over the 20-year planning horizon as a result of consent.

Without factoring in other intensification opportunities throughout the Municipality (Urban, Hamlet, Rural Residential), the residential lot supply amounts to approximately 2,748 lots/units, either registered or pending registration, as well as 190 lots by severance over the 10-year planning horizon, for a total of 2,938 possible lots over the 10-year planning horizon.

Based on past housing starts, the residential lot supply would meet projected housing needs for a time horizon of up to 20 years. However, based on our projections found in Table 4.1, we anticipate a need for approximately 6,249 units to meet projected needs for a time horizon of up to 20 years (2008-2028). This would represent an average of 312 building permits per year. Our projections have assumed that the average household size would decline over the planning horizon; therefore, resulting in an increase in demand for new housing units to meet projections.

**Table 4.1: Units/Lots Required to Meet Projections (2011-2028)**

Year	Single-detached	Semi-detached	Apartment Duplex	Row House	Apartment < 5 Storeys	Apartment > 4 Storeys	Additional Units Required
<b>2007</b>	Estimated to comprise 5456 units						
<b>2011</b>	1051	53	9	34	44	0	<b>1,190</b>
<b>2016</b>	1004	63	6	37	59	0	<b>1,169</b>
<b>2021</b>	1307	80	7	46	77	0	<b>1,517</b>
<b>2026</b>	1438	87	6	56	100	0	<b>1,687</b>
<b>2028</b>	565	45	0	26	50	0	<b>686</b>
<b>Total</b>							<b>6,249</b>

**Table 4.2: Future Residential Land Requirements**

Total Population to be Accommodated (2008-2028)	12,901
Total Number Lots/Units Required	6,249
<b>Existing Lot/Unit Inventory</b>	
Existing Vacant Hamlet Lots –Registered	14
Existing Vacant Urban Subdivision Lots - Registered	268
Existing Vacant Rural Residential Subdivision Lots	189
Subtotal	471
<b>Projected Lot/Unit Creation (2008-2028)</b>	
Draft Approved or Pending Urban Lots	1,833
Draft Approved or Pending Rural Residential Lots	444
Future Severances (avg. 19/yr)	380
Subtotal	2,657
<b>Intensification Opportunities (2008-2028)</b>	
Hamlets	954
Urban Area (Avg. 23 u/n.h.)	1,058
Subtotal	1,775
Total Existing and Projected Lots/Units	5,150
No. of Lots/Units Required to Meet Projected Demand	6,249
<b>SUPPLY MINUS DEMAND</b>	<b>-1,099</b>

Based on the servicing capacity and the status of planning approvals, the short-term supply of lots/units (0-3 years) represents 666 urban serviced lots/units (includes 167 units within Oxford Village on private individual wells), 304 rural residential unserviced lots/units, 14 Hamlet lots, plus approximately 57 lots (average of 19 severances per year) to be created by severance. This represents a total of 1,041 lots/units or 347 lots/units per year available to meet the three-year demand. According to Table 4.1, the three-year demand represents a need for approximately 892 units, or an average of 297 units/lots per year. Therefore, there is sufficient land with servicing capacity to provide at least a three-year supply of residential units through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.

Future developments in both the rural residential, hamlet and urban areas pending capacity commitments represents a probable unit yield of 2,734 lots/units, plus approximately 19 lots per year created by severance. In order to accommodate residential growth for a minimum of 10 years, there is a potential for 2,924 lots/units. This represents an average of 292 lots/units per year; not taking into account other intensification and redevelopment possibilities. Based on Table 4.1, the 10-year demand represents a need for approximately 2,667 units, or an average of 266 lots/units per year. Therefore, there is sufficient land to accommodate growth for a minimum of 10 years through residential intensification and redevelopment and lands designated and available for residential development over the 10-year planning horizon.

Based on Table 4.1, we are projecting a housing need of approximately 6,249 new dwelling units over the 20-year planning horizon. There is a potential for:

- 2,734 lots/units to be created through plans of subdivision,
- 1,058 through intensification in the Urban Area,
- 954 through intensification of the Hamlet Areas, and
- an additional 380 lots created by severance.

This would provide for a total of approximately 5,150 lots/units. Therefore, we anticipate a shortage of 1,099 lots/units to meet residential demand over the 20-year planning horizon.

Lands to accommodate the projected dwelling unit demand to the year 2028 could be located in three areas.

1. Rural Residential subdivisions on private or communal sewer and water services
2. Expansion to Hamlet Areas on private or communal sewer and water services
3. Expansion to the Urban Serviced Area on full municipal services.

If all projected demand were located in new rural residential subdivisions or hamlets, an additional 505 hectares of land would be required (based on 0.4 ha lots plus 15% roads and other design constraints) to be designated in the updated Official Plan.

On the other hand, if all projected demand were accommodated within an expanded Urban Service Area, the residential land requirements would be 55 hectares, based on the Official Plan policy of an average density of 23 units per net hectare.

#### 4.2 Industrial, Commercial, Institutional Land Needs

According to the Employment Projections for North Grenville, there is a need for anywhere between 57.42 to 200 hectares of employment land to accommodate employment in the Municipality over the planning horizon. Considering there are approximately 218 hectares of vacant or under developed employment lands in the Urban Service Area (Industrial, Commercial, and Institutional), there are sufficient employment lands to meet projected demands.

There is a considerable supply of commercial vacant land available to accommodate potential demand for commercial growth within the next 20 years. Large format retail will most likely locate along the Highway 416 corridor. It can be expected that some of the commercial development will occur through redevelopment or replacement of existing uses, which will have little impact on the overall land requirements for urban growth purposes.

The land supply for non-residential land (ICI) is adequate for accommodating projected development needs for the 20-year planning horizon. The following table represents needs for employment lands if the Municipality establishes policies to retain more of its resident labour force.

**Table 4.3 : Projected Employment Land Needs Based on Resident Labour Force - 2028**

% Resident Labour Force Working in North Grenville	Additional Land Area Requirements (based on 45 employees / hectare)
100	200
90	167
80	134
70	102
60	69
57.3	57

From an economic development perspective, it is critical that appropriately located and serviced industrial and business park land be consistently available for sale if the Municipality is to remain competitive in the surrounding marketplace. The cyclical nature of demand, the length of time to get planning approvals, the varying land requirements of potential businesses, the need for a variety of ownership and tenure options, and the important role municipalities can play in ensuring consistency in the availability of an adequate and appropriate supply, are among the many factors that need to be considered in determining appropriate response to the land needs of new and expanding businesses. There should be a strong focus on the availability of municipally-owned industrial and business parkland to meet such needs. From an Economic Development perspective, the Municipality should maintain current, detailed inventories of industrial land development in the Municipality as part of their strategy.

For the purpose of this land needs analysis, and zoning issues aside, there are sufficient employment lands available for the 20-year time horizon. However, in an effort to increase the resident labour force to work in the Municipality, designated and available employment lands at key locations might be required over the planning horizon.

## **5.0 SERVICING**

Based on the 2005 Water and Wastewater Servicing Master Plan and Addendums, and information provided by the Municipality, there is sufficient wastewater plant capacity and water supply capacity to provide at least a three-year supply of residential units and to support current and projected employment needs, as required by the PPS. However, additional water supply capacity (additional wells) and additional wastewater plant capacity will be required to meet the servicing demands of future serviced developments.

## **6.0 CONCLUSION**

Based on the analysis set out in this Report, and consistent with the Provincial Policy Statement, North Grenville has:

- the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment, and lands designated and available for residential development; and

- land with servicing capacity sufficient to provide at least a three year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.

However, there are insufficient lands, either through intensification, redevelopment and/or designated growth areas, to accommodate an appropriate range and mix housing to meet projected needs for a time horizon of up to 20 years.

Also, if the share of resident labour force finds employment in the Municipality, we could potentially have a shortage of employment lands over the 20 year planning horizon.

Furthermore, opportunities for land severances will be limited due to constraints from agriculture lands, minerals aggregate resource areas, floodplains, wetlands, etc.

In conclusion, minor adjustments to designated growth areas will be required to meet residential projections over the long-term planning horizon. In terms of intensification and affordability, the Plan will need to include policies to achieve this goal, as well as criteria for considering intensification and affordability.

The following section identifies parcels where landowners or their agents made requests for their land to be included within a designated growth area (Urban Service Area or Hamlet). As a next step, Council may request a further investigation of, and determination of preferred areas for expansion.

## **7.0 REQUESTS FOR EXPANSION TO A SETTLEMENT AREA BOUNDARY OR REDESIGNATION**

### **7.1 Requests for Inclusion or Redesignation**

During the 2007-2008 Official Plan Review process, and as of April 18, 2008, 11 requests were made by landowners, or their agents, for lands to be included or redesignated within a Settlement Area (Hamlet or Urban Service Area). These requests are shown on Figures 6 and 7, and a full list can be found in Table 7.1, along with a description.

**Table 7.1: Requests for Expansion to a Settlement Area Boundary or Redesignation**

Name of Owner of Agent making request	Description of Request
<b>Urban Service Area</b>	
Novatech Engineering Consultants Ltd.	Request to remove the unit cap for eQuinelle to permit an additional 688 units.
Stantec	Request to amend Schedule A and B to include Part of Lots 24, Concession II within the Urban Service Area. Area consists of approximately 42.63 hectares of land. Potential for 833 units.
Geraldine Taylor	Request to amend Schedules A and B to include 2660 Concession Road within the Urban Service Area. This 3 hectare property is currently designated Agriculture. A concept has been prepared showing 42 student apartments, a seniors nursing home for 60 residents, 24 units for seniors assisted living and 24 units for independent living units. However, based on the average of 23 units per net hectare that would represent 59 units, or based on a maximum of 33 units per net hectare, would represent 85 units.
Barry Forbes	Request to amend Schedules A and B to include Part of Lot 26, Concession II to be within the Urban Service Area. Lands are currently designated Rural and within the waste disposal influence area. Area consists of approximately 24.45 hectares of land. Subject to completing the appropriate studies, there is a potential for 478 units.
Municipal Information	Remove Part of Lots 24 and 25, Concession III from the Urban Service Area. Lands are currently designated Rural or Rural Residential with servicing constraints. No intensification units have been assumed, however, there is an application to amend the Official Plan to change a parcel from Rural to Rural Residential to permit 7 lots/units.
Municipal Information	Remove Part of Lot 30, Concession III, and Part of Lots 12, 13, and 14, Concession VI, from the Urban Service Area. Lands are designated Highway Commercial with servicing constraints and represent approximately 85.10 hectares of employment lands.

**Municipal Information**

Add Part of Lots 11-14, Concession VII to the Urban Service Area, to be designated Highway Commercial. Lands are currently designated Rural. Area consists of approximately 82.32 hectares of employment lands.

**Municipal Information**

Add Part of Lot 24, Concession II to the Urban Service Area to be designated Residential. Lands are currently designated Rural. Area consists of approximately 46.27 hectares of land. There is a potential for 904 units.

**Hamlets**

**Peter Van Adrichem**

Request to amend Schedule A to permit rural residential development along Smith Road (Lot 22, Concession 10). Has filed an application to amend the Official Plan. Should be reviewed as a rural residential subdivision or expansion to Oxford Station boundary.

**Novatech Engineering Consultants Ltd.**

Request to amend Schedule A to expand the Settlement Area boundary at Pelton's Corners. A concept plan was prepared showing Phase 1, consisting of 27 lots. Area consists of approximately 17.25 hectares. There is potential for 36 units/lots.

**Employment Lands**

**Yogi Anand and Charlie Price**

Request to amend Schedule B to change the designation of the lands on the west side of Highway 19 (Part of Lot 19, Concession III) from Industrial to Highway Commercial. No impact to availability of employment lands.

**Sheila Eckford**

Request to amend Schedule B to change the designation of lands at 111 Georgiana from Highway Commercial to Residential. Negligible impact to employment lands.

**Municipal Information**

A pre-consultation was held to discuss changing the designation of Part of Lot 29, Concession III (south of Brookside) from Industrial to Residential. Potential for 72 units based on concept.

**Others**

Novatech Engineering Consultants Ltd.	Request to amend to Schedule A to remove a portion of the lands in Lot 23, Concession III, (Oxford) from a Mineral Resource designation to a Rural designation. A report has been prepared and circulated to Ministry of Natural Resources for comments.
John Sawarna	Request to amend to Schedule A to change the designation of a portion of Lot 7, Concession 3, West Half, from Agriculture to Rural.
Municipal Information	Change the designation of Part of Lots 22 and 23, Concession III from Agriculture to Rural Residential. Area consists of approximately 34.26 hectares of land. Potential for 48 units.

**7.2 Conclusion**

Results of the land needs analysis demonstrate that there is a need for additional land to be added to a designated growth area (Urban, Hamlet, Rural Residential) during this Official Plan Review Update. The following are criteria that could be considered to assist in determining areas for expansion:

- What are the servicing implications?
- What are the potential impacts on existing communities?
- What are the potential effects on natural features and ecological functions?
- What are the potential impacts on agriculture?
- Does the proposed expansion represent a logical extension of the existing settlement areas (i.e., Urban Areas)?
- Can the proposed expansion area be integrated with existing and future communities?

Designated growth area boundaries will be reviewed as part of the Official Plan Review/Update based on these findings and direction from the Municipality.

Prepared by:

J.L. RICHARDS & ASSOCIATES LIMITED



Marc Rivet, MCIP, RPP