

Dufferin County Municipal Comprehensive Review

# DRAFT LAND NEEDS ASSESSMENT REPORT

July 13, 2022





# DUFFERIN COUNTY MUNICIPAL COMPREHENSIVE REVIEW

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DUFFERIN COUNTY

PROJECT NO.: 19M-01335-00  
July 13, 2022

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## LIST OF ACRONYMS

- GGH:** Greater Golden Horseshoe
- GTA:** Greater Toronto Area
- MCR:** municipal comprehensive review
- MDS:** Minimum Distance Separation
- OP:** official plan
- OPA:** official plan amendment
- PPS:** Provincial Policy Statement, 2020

# 1 INTRODUCTION

This report provides a summary of the land needs assessment undertaken in support of the Dufferin County Municipal Comprehensive Review (MCR) for the purposes of conforming to the 2020 consolidated Growth Plan for the Greater Golden Horseshoe (Growth Plan).

The Planning Act requires all upper-tier municipalities to adopt an Official Plan. The Dufferin County Official Plan was adopted in 2015. New Official Plans are required to be reviewed and updated within ten years of adoption, however the release of an updated Growth Plan in 2017 included a requirement for upper-tier municipalities to update their Official Plans to conform by July 2, 2022.

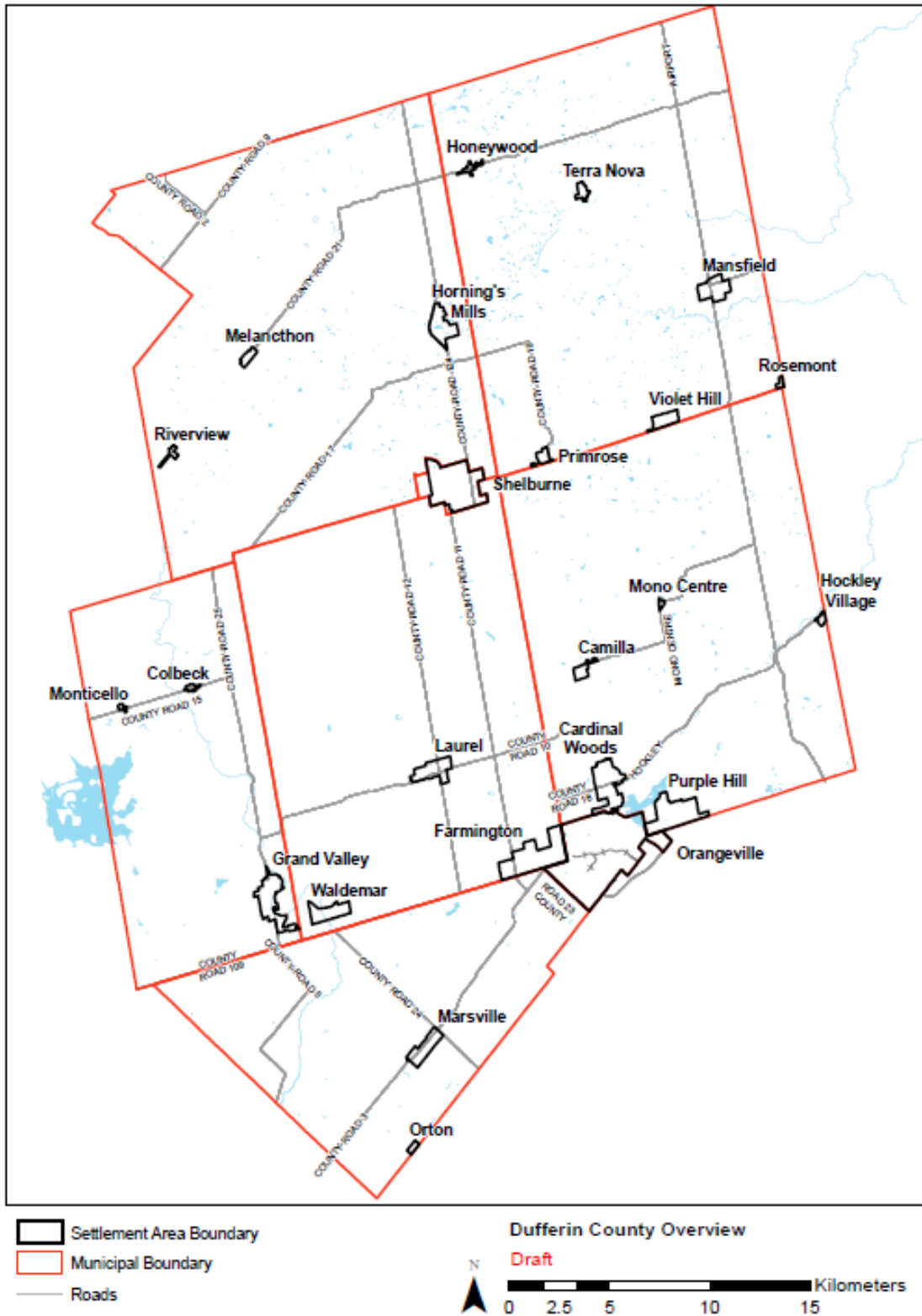
The 2020 consolidated Growth Plan for the Greater Golden Horseshoe (the Growth Plan) provided new population and employment forecasts for single- and upper-tier municipalities within the Growth Plan area, including Dufferin County. The purpose of the land needs assessment is to allocate the forecasted population and employment growth to each of the lower tier municipalities within Dufferin County and determine whether there is a need to expand any settlement areas. This process also includes confirming appropriate intensification and density targets as mandated by the Growth Plan.

There are eight local municipalities in Dufferin County: Township of Amaranth; Township of East Garafraxa; Township of Melancthon; Township of Mulmur; Town of Mono; Town of Shelburne; Town of Grand Valley; Town of Orangeville. Shelburne, Grand Valley and Orangeville are the only municipalities that have urban settlement areas with full municipal services. The urban settlement areas are comprised of delineated built-up area and designated greenfield area under the Growth Plan. Grand Valley and the remaining municipalities have community settlement areas with partial services, or no municipal services, and are primarily rural/agricultural in nature. The community settlement areas are considered rural settlements under the Growth Plan. Exhibit 1: Map of Dufferin County, Local Municipalities & Settlement Areas shows a map of Dufferin County including the boundaries of each municipality and each settlement area.

The land needs assessment includes a brief overview of the growth management policies intended to be implemented through the MCR, and the population and employment forecasts for Dufferin County. The proposed allocations of the forecast growth to each local municipality are summarized, along with the land needs calculated for each settlement area. This report concludes with the proposed land areas and policy recommendations required to accommodate forecasted growth.



Exhibit 1: Map of Dufferin County, Local Municipalities & Settlement Areas



## 2 POLICY FRAMEWORK

The Dufferin County MCR is required to follow the applicable requirements of the Planning Act and policies of the Provincial Policy Statement and the Growth Plan. These address both land use planning policy, and the process for determining land needs for residential and employment uses.

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### 2.1 PLANNING ACT

The *Planning Act*, R.S.O. 1990, Chapter P.13 is the statute that guides all land-use planning decisions in the Province of Ontario through a hierarchical framework that extends to upper-, lower- and single-tier municipalities. The Planning Act authorizes the tools municipalities can use to guide and direct land-use and development within their jurisdictions.

Section 16 of the *Act* outlines the required contents of a municipal official plan, which include:

- goals and objectives for economic growth and the built and natural environment within the municipality, and establishing policies for land use to meet those goals;
- policies to provide adequate affordable housing within the municipality;
- outlining the measures and methods for changing the use of land within the municipality, such as official plan amendments (OPAs), zoning by-law amendments (ZBAs), site plans and plans of subdivision.

The *Planning Act* also directs that municipal planning decisions (which includes the creation or modification of OPs) implement provincial policy and priorities in the following ways:

- by **having regard to** various matters of provincial interest, including protection of ecological systems and agricultural resources, the orderly development of communities, and adequate provision of housing and employment opportunities;
- by **being consistent** with the PPS or other policy statements issued by the province;
- by **conforming** to provincial plans, including the Growth Plan for the Greater Golden Horseshoe, The Greenbelt Plan and others.

The nature of land use planning in Ontario means that through the statutory requirements of the *Planning Act*, a common line can be drawn from the broad policy priorities of the province at the top of the planning hierarchy down through the PPS and provincial plans, then municipal official plans, all the way down to decisions on specific plots of land.

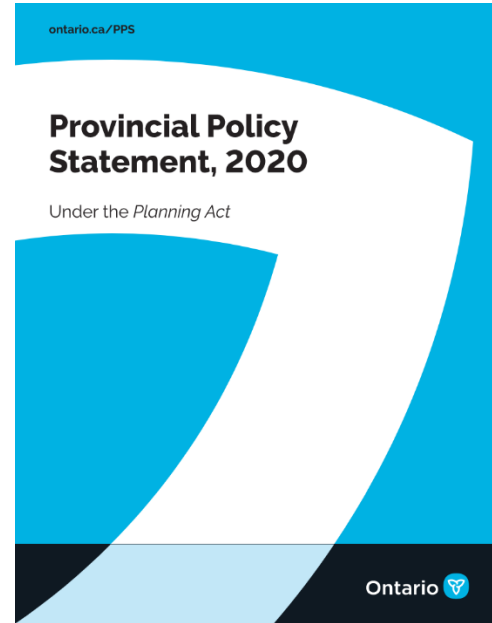
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### 2.2 PROVINCIAL POLICY STATEMENT, 2020

The Provincial Policy Statement, 2020 (PPS, 2020) was released by the Province on February 28, 2020 and came into effect on May 1, 2020, replacing the previous PPS, 2014. The PPS is issued under the authority of Section 3 of the Planning Act and provides direction on key Provincial interests related to land use planning and development in Ontario. The County's Official Plan and subsequent land use planning decisions are required to be "consistent with" the PPS. The PPS provides policy direction related to three key themes:



- Building Strong Healthy Communities (Section 1.0), to promote efficient land use and development patterns; promote strong, liveable, healthy, and resilient communities; and ensure appropriate opportunities for employment and residential development.
- Wise Use and Management of Resources (Section 2.0), to protect natural heritage, water, agricultural, mineral and cultural heritage and archaeological resources for their economic, environmental and social benefits.
- Protecting Public Health and Safety (Section 3.0), to reduce the potential for public cost or risk to Ontario's residents from natural or human-made hazards.



The current County Official Plan was written to be consistent with the PPS, 2014. The PPS, 2020 retains many of the policies of the PPS, 2014 with some minor changes to language to improve clarity or to emphasize government priorities. The key policies changes found in the PPS, 2020 include:

- The addition of market demand as a consideration for the expansion of Settlement Areas.
- Policy to allow municipalities to adjustment to settlement areas outside of a Municipal Comprehensive Review process, subject to certain criteria.
- The addition of new language around market-based and affordable housing options.
- An increase of the planning horizon from 20 to 25 years and requirement for a 15-year, rather than 10-year, supply of residential land.
- An expansion of the Land Use Compatibility policies to emphasize protection of employment uses from sensitive land uses.

The PPS provides detailed policies related to two key land use planning principles:

- **Settlement area boundary expansions:** Section 1.1.3.8 of the PPS, 2020 states that the expansion of a settlement area boundary to accommodate projected population growth may only take place if there is no option to accommodate the growth through intensification or redevelopment, and that infrastructure and public services which are existing or planned to serve the expanded settlement area are viable and will not place an undue burden on the finances of the municipality, the health and safety of its residents, or the natural environment.
  - Additional restrictions are placed on the proposed expansion of a settlement boundary into **prime agricultural areas**. It must be demonstrated that the lands to be included in the settlement area do not comprise specialty crop areas, and that all options to expand in areas that are not prime agriculture or are lower priority agricultural lands (e.g. expanding into Class 4 or 5 lands under the Canada Land Inventory, instead of Class 1, 2 or 3 lands). New lands added to settlement areas must also comply with the provincial Minimum Distance Separation (MDS) formulae.

- **Employment area conversions:** Section 1.3.2.4 of the PPS, 2020 states that conversion of lands within employment areas to a non-employment use may only occur at the time of a comprehensive review, and only if the new land use meets demonstrated need (e.g. new residential lands to meet growth projections) and the lands in question are not required for employment over the long-term.

The requirements related to comprehensive review under the PPS, 2020 help to ensure that development within municipalities in Ontario proceeds in an orderly manner, and that agricultural and employment lands are protected as much as possible while allowing for the accommodation of growth. The additional overlay of provincial plans to this policy framework helps protect natural heritage (Greenbelt Plan, 2017, Niagara Escarpment Plan, 2017, and the Oak Ridges Moraine Conservation Plan, 2017), and from urban sprawl through the Growth Plan for the Greater Golden Horseshoe, 2020, which is described below.

## 2.3 A PLACE TO GROW: GROWTH PLAN FOR THE GREATER GOLDEN HORSESHOE, 2020

The Province released the first Growth Plan for the Greater Golden Horseshoe in 2006, and has updated it several times since, with the most recent being A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020 (the Growth Plan).

The Growth Plan contains population and employment forecasts for the 2051 planning horizon, which are required to be implemented into the official plans of all upper- and single-tier municipalities within the Growth Plan area. Upper-tier official plans must also include direction for the allocation of their growth forecasts across the local municipalities within the upper-tier.

The policies of the Growth Plan direct growth to existing built-up areas to the extent possible before the expansion of Settlement Areas should be contemplated. These policies are to be implemented through the Dufferin County Official Plan during the **municipal comprehensive review**.

The following key policies of the Growth Plan can only be implemented through a comprehensive review (with some exceptions):

- **Managing Growth Forecasts:** Section 2.2 of the Growth Plan for The Greater Golden Horseshoe, 2020 states all upper-tier municipalities will, at a minimum, through a municipal comprehensive review, apply the population and employment forecasts in Schedule 3 of the Growth Plan or such higher forecasts as are established by the applicable upper-tier municipality through its municipal comprehensive review for planning and managing growth to the horizon of this Plan. Forecasted growth will be allocated to the local municipalities through the municipal comprehensive review based on policies of the Growth Plan.
- **Settlement Area Expansions:** Section 2.2.8 of the Growth Plan for The Greater Golden Horseshoe, 2020 states a settlement area boundary expansion may occur through a municipal comprehensive review where it has been demonstrated that an expansion is required to accommodate the forecasted growth based on the minimum intensification and density targets in the Growth Plan. The municipal comprehensive review will determine the most appropriate



location for the any settlement area expansion based on the comprehensive application of all of the policies in the Growth Plan (Settlement Area adjustments and expansions may also be considered outside of a comprehensive review, subject to certain conditions).

- **Natural Heritage System Refinement:** Section 4.2.2.5 of the Growth Plan for The Greater Golden Horseshoe, 2020 states upper- and single-tier municipalities may refine provincial mapping of the Natural Heritage System for the Growth Plan at the time of initial implementation in their official plans. After the Natural Heritage System for the Growth Plan has been implemented in official plans, further refinements may only occur through a municipal comprehensive review.
- **Agricultural System Refinement:** Section 4.2.6.9 of the Growth Plan for The Greater Golden Horseshoe, 2020, upper-tier municipalities may refine provincial mapping of the agricultural land base at the time of initial implementation in their official plans, based on implementation procedures issued by the Province. After provincial mapping of the agricultural land base has been implemented in official plans, further refinements may only occur through a municipal comprehensive review.
- **Employment Lands Conversion:** Section 2.2.5.9 of the Growth Plan for the Greater Golden Horseshoe, 2020 states the conversion of lands within employment areas to non-employment uses may be permitted only through a municipal comprehensive review where it is demonstrated that there is a need for conversion, the lands are not required over the horizon of the Growth Plan for the employment purposes, the municipality will maintain sufficient employment lands to accommodate forecasted employment growth to the horizon of the Growth Plan, the proposed uses would not adversely affect the overall viability of the employment area or the achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Plan, and there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.

*Exhibit 2: Map of Growth Plan Area (Province of Ontario)*



To address these important elements of the Growth Plan, it was necessary for the MCR to consider how the County's Settlement Areas, Community Areas, Lands outside settlement areas, Housing trends and Employment areas all interact with each other and influence growth and development patterns.

### 2.3.1 SETTLEMENT AREAS

Section 2.2 of the Growth Plan, 2020 contains policies regarding **settlement areas**, which the Growth Plan defines as:

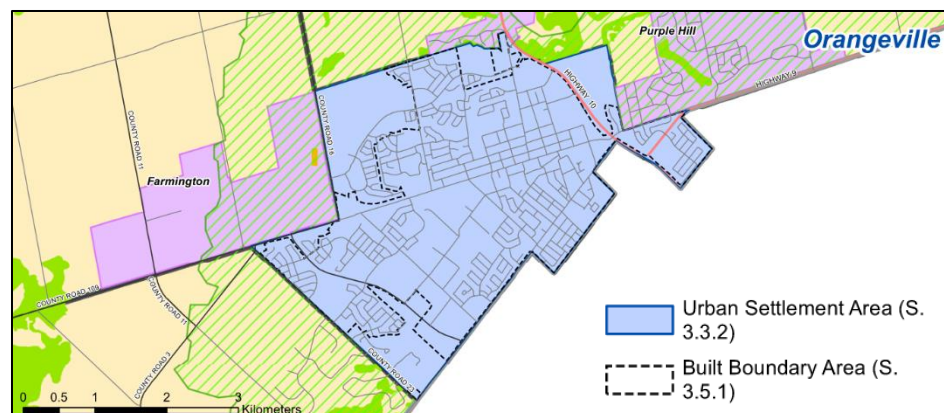
- a) "built up areas where development is concentrated, and which have a mix of land uses; and
- b) lands which have been designated in an official plan for development in accordance with the policies of this Plan. Where there are no lands that have been designated for development, the settlement area may be no larger than the area where development is concentrated."

Section 2.2.1 of the Growth Plan directs that growth in a municipality be directed to settlement areas which have a delineated built boundary, existing municipal services, and are capable of supporting **complete communities** (areas or neighbourhoods where people of all ages have convenient access to a range of housing and transportation, jobs, stores and public services). Growth in settlement areas that are rural in nature and/or do not have municipal services, and/or are located within the Greenbelt Plan area, is to be limited. Settlement areas should be planned with regard to infrastructure and public services needs and optimizing their use.

The policies of the current County OP regarding settlement areas are generally in conformity with the Growth Plan, 2020. Section 3.1(a) and (b) of the County OP set the objective of creating "complete, healthy, and vibrant communities", and direct that the majority of development in the County be directed to three settlement areas within the Towns of Orangeville, Grand Valley, and Shelburne. Section 3.3.3 of the County OP also notes that some growth may be accommodated in community (i.e. rural) settlement areas through infill and development of vacant land, recognizing that some community settlement areas may not have the required services. Section 4.3.2(g) encourages local municipalities to "promote development within settlement that is compact, mixed use, and supports transit and active transportation, with a broad range of housing types, services and amenities available for all residents", which could support the creation of complete communities in the County.

#### 2.3.1.1 Delineation of built-up areas

Section 2.2.2 of the Growth Plan, 2020 contains policies regarding growth in the **delineated built-up area** of a settlement area, which contains the lands contained within the **built boundary** (see **Figure 2.1**) of the settlement that have been identified by the Minister of Municipal Affairs and Housing as the target for **intensification**. Intensification can occur through redevelopment (including brownfield sites), development of vacant or under-utilized



**Figure 2.1: Map showing the Orangeville settlement area and delineated built-up area.**

lots in already-developed areas, infill development (e.g. through severances), or expansion/conversion of existing buildings. While Section 2.2.2.1(a) of the Growth Plan defines a minimum intensification target for several municipalities (50% of all annual residential development to occur within the delineated built-up area), Dufferin County, through Section 2.2.2.1(b), is directed to establish an intensification target through its MCR which maintains or improves upon the intensification target contained in its existing plan.

Section 3.4.2 of the existing County OP directs that the County will meet the following targets for percentage of annual new residential development occurring the delineated built-up areas of its three settlement areas:

- Grand Valley: 12%
- Orangeville: 50%
- Shelburne: 38%

All of Dufferin County: 40% of annual new residential development to occur within the delineated built-up areas.

### *2.3.1.2 Strategic Growth Areas*

Section 2.2.1 of the Growth Plan, 2020 contains policies regarding **strategic growth areas**. Strategic growth areas include urban growth centres, major transit station areas, and other major opportunities that may include infill, redevelopment, brownfield sites, the expansion or conversion of existing buildings, or greyfields. Lands along major roads, arterials, or other areas with existing or planned frequent transit service or higher order transit corridors may also be identified as strategic growth areas. Within the settlement area, growth is intended to focus in strategic growth areas.

All municipalities are required to develop a strategy to achieve the minimum intensification target and intensification throughout **delineated built-up areas**, which will identify the appropriate type and scale of development in strategic growth areas and transition of built form to adjacent areas. Dufferin County has not identified Strategic Growth Areas, however when the local municipalities update their Official Plans for conformity with the updated County OP, it may be advisable for them to identify Strategic Growth Areas to help achieve intensification targets.

### *2.3.1.3 Identification of Excess lands*

Section 2.2.1 of the Growth Plan, 2020 contains policies regarding the identification of excess lands. Excess lands represent vacant, unbuilt but developable lands within settlement areas but outside of delineated built-up areas that have been designated in an official plan for development but are in excess of what is needed to accommodate forecasted growth to the horizon of the Growth Plan.

Through the land needs assessment, it was determined there are no excess lands within Dufferin County based on the hierarchy of settlement areas established in accordance with the Growth Plan.



#### 2.3.1.4 Settlement boundary expansion

Section 2.2.8 of the Growth Plan, 2020 contains policies regarding **settlement area boundary expansions**. Settlement areas represent urban areas and rural settlements within municipalities that are built up areas where development is concentrated, and which have a mix of land uses and lands which have been designated in an official plan for development in accordance with the policies of the Plan. As per Section 2.2.1, settlement areas are to be the focus of growth. Section 2.2.8 of the Plan requires settlement area boundaries to be delineated in official plans. A settlement area boundary expansion may only occur through a municipal comprehensive review where requirements of the Plan has been demonstrated as follows:

- based on the minimum intensification and density targets in this Plan and a land needs assessment undertaken in accordance with policy 2.2.1.5, sufficient opportunities to accommodate forecasted growth to the horizon of this Plan are not available through intensification and in the designated greenfield area
- the proposed expansion will make available sufficient lands not exceeding the horizon of this Plan, based on the analysis provided for in policy 2.2.8.2 a), while minimizing land consumption; and
- the timing of the proposed expansion and the phasing of development within the designated greenfield area will not adversely affect the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan.

Where the need for a settlement area boundary expansion has been justified in accordance with the above criteria, the feasibility of the proposed expansion will be determined and the most appropriate location for the proposed expansion will be identified.

### 2.3.2 RURAL AREAS

Section 2.2.9 of the Growth Plan, 2020 contains policies regarding **rural areas**. Rural areas represent lands which are located outside settlement areas and which are outside prime agricultural areas, as well as rural settlements. Development is to be limited to the following:

- a) the management or use of resources;
- b) resource-based recreational uses; and
- c) other rural land uses that are not appropriate in settlement areas provided they:
  - i. are compatible with the rural landscape and surrounding local land uses;
  - ii. will be sustained by rural service levels; and
  - iii. will not adversely affect the protection of agricultural uses and other resource-based uses such as mineral aggregate operations.

Significant growth and development is not intended to be directed to rural areas or rural settlements.

### 2.3.3 EMPLOYMENT AREAS

Under Section 2.2.5 of the Growth Plan, 2020 upper-tier municipalities, in consultation with local municipalities, will designate all employment areas in official plans and protect them for appropriate employment uses over the long-term. As per Schedule 3 of the Plan, Dufferin County is expected to accommodate 39,000 jobs by 2051. Municipalities are to make more efficient use of existing employment areas and vacant and underutilized employment lands by increasing employment densities.

The conversion of lands within employment areas to non-employment uses may be permitted only through a **municipal comprehensive review** subject to certain criteria set out in Section 2.2.5.9 of the Growth Plan. The Employment Lands Needs Assessment undertaken as part of the MCR establishes a benchmark by which conversion requests may be evaluated. Conversions may only be permitted where it has been demonstrated that:

- there is a need for the conversion
- the lands are not required over the horizon of this Plan for the employment purposes for which they are designated
- the municipality will maintain sufficient employment lands to accommodate forecasted employment growth to the horizon of this Plan
- the proposed uses would not adversely affect the overall viability of the employment area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of the Growth Plan; and,
- and there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.

### 2.3.4 HOUSING

Section 2.2.6 of the Growth Plan, 2020 contains policies regarding housing. Upper-tier municipalities are required to support housing choice options through the achievement of the minimum intensification and density targets of the Growth Plan. Municipalities are to maintain land with servicing capacity sufficient to provide at least a three-year supply of residential units. This supply will include, and may exclusively consist of, lands suitably zoned for intensification and redevelopment.

To achieve complete communities, municipalities are to plan to accommodate forecasted growth to the horizon of the Plan, plan to achieve the minimum intensification and density targets, considering the range and mix of housing options and densities of the existing housing stock, and plan to diversify their overall housing stock across the municipality.

### 2.3.5 SCHEDULE 3 FORECASTS

Under Section 5.2.4 of the Growth Plan, “all upper-and single-tier municipalities will, at a minimum, through a municipal comprehensive review, apply the forecasts in Schedule 3 or higher forecasts as are established through the municipal comprehensive review for planning and managing growth to the horizon of this Plan.”

Schedule 3 identifies population and employment forecasts to the year 2051. Dufferin County is forecast to have a total of 95,000 residents, and 39,000 jobs.



# 3 POPULATION & EMPLOYMENT ALLOCATION TO 2051

The Growth Plan mandates the County Official Plan to accommodate a total of 95,000 people and 39,000 jobs by 2051 (Schedule 3 of the Growth Plan). This is achieved by allocating population and employment growth to each of the local municipalities to inform a land needs assessment. The land needs assessment follows a Provincial methodology to determine whether the allocated growth can be accommodated within the existing settlement areas and, if not, if an expansion is necessary. Where expansion would not be possible, a strategic approach is needed to determine the resulting intensification that may be required until such time that additional lands may be identified.

The projected population and employment growth for the County between 2021 and 2051 must be allocated equitably and appropriately between each of the local municipalities based on future needs. Section 2.2.1 of the Growth Plan requires the County to allocate projected growth to each local municipality on the basis of the following criteria:

- The vast majority of growth will be directed to settlement areas with a delineated built boundary, existing or planned water and wastewater system and ability to support complete communities; and
- Growth is to be limited in settlement areas that are rural, not serviced by municipal water or wastewater systems or are in the Greenbelt Area.

Given these criteria, it is noted that the Town of Grand Valley, Town of Orangeville and Town of Shelburne include delineated built-up areas / designated greenfield areas and full municipal water and sewer services. The remaining local municipalities within Dufferin County are primarily rural in nature with smaller “community settlement areas” on partial services, or private-individual services only. In addition to the settlement area type criteria, the following factors were accounted for in allocating growth to the local municipalities:

- Mid-2021 population estimates derived from 2021 Census results and baseline modelling undertaken by MetroEconomics which considered municipal development and building permit activity and property assessment data; and
- The size of the existing population and the estimated remaining residential development capacity in the settlement areas based on recent residential development trends.

With respect to the three municipalities with urban settlement areas, the GMS allocations further recognize that:

- Orangeville is substantially the largest population and economic centre in Dufferin County and, in the absence of physical land and servicing constraints, would attract the vast majority of growth. Due to long term servicing and land supply concerns, however, a substantial amount of growth is being allocated to Shelburne and Grand Valley;

- Orangeville planning and engineering staff have estimated that servicing improvements can reasonably address a population allocation of approximately 38,500 by 2051. However, Orangeville’s settlement area boundary has reached its limit and is coincident with its corporate municipal boundary and, therefore, does not have additional land available for expansion;
- Local staff in Shelburne, the second largest population and economic centre in Dufferin County, estimate that a population of approximately 15,000 can be accommodated on the basis of servicing by 2051. The GMS allocation also recognizes the Shelburne West Expansion Area and acknowledges that it represents the last logical Settlement Area expansion opportunity within the corporate municipal boundary; and,
- Grand Valley is the third municipality within Dufferin County with full municipal services within its settlement area. There also remains the potential for settlement area expansion within the existing corporate municipal boundary.

With respect to the remaining local municipalities which include rural, unserviced or partially serviced Settlement Areas (i.e. Rural Settlements), the GMS allocation represents the estimated remaining development capacity in the Rural Settlements after accounting for the limited amount of development that is permitted outside of settlement areas. Residential development activity outside of the rural settlements was primarily estimated based on recent trends by comparing property assessment snapshots from 2016 and 2020.

Accounting for these parameters and inputs, MetroEconomics worked with WSP to generate the 2051 population and employment allocation figures shown in Exhibit 3: Estimated Existing & Proposed to be Allocated Population & Employment. With the population allocations as an input, employment growth was projected by MetroEconomics using their proprietary model which is consistent with the Provincial Land Needs Assessment methodology. Note that population figures are postcensal (i.e. they’re adjusted for Census undercount – people that were likely missed on Census day 2021) and the employment figures include people with no fixed place of work (e.g. travelling sales, construction workers, etc.).

**Exhibit 3: Estimated Existing & Proposed to be Allocated Population & Employment**

Municipality	Population (Nearest 100)			Employment (Nearest 100)		
	2021 Estimate	2051 Allocated	2021-2051 Growth	2021 Estimate	2051 Allocated	2021-2051 Growth
<b>Amaranth</b>	4,500	8,300	3,800	1,300	2,500	1,200
<b>East Garafraxa</b>	2,900	3,900	1,000	700	10,000	300
<b>Grand Valley</b>	4,000	10,900	6,900	900	2,700	1,800
<b>Melancthon</b>	3,200	4,300	1,100	600	900	200
<b>Mono</b>	9,700	9,600	-100	2,800	3,300	500
<b>Mulmur</b>	3,700	4,500	800	900	1,200	400
<b>Orangeville</b>	31,000	38,500	7,400	14,700	21,700	7,100
<b>Shelburne</b>	9,400	15,100	5,700	3,100	5,700	2,600
<b>Dufferin County</b>	<b>68,400</b>	<b>95,000</b>	<b>26,700</b>	<b>25,000</b>	<b>39,000</b>	<b>14,000</b>

Note that the population based on the allocation for Mono is projected to decline slightly between 2021 and 2051. Mono's population should be considered stable between 2021 and 2051. The slight decline is projected as the estimated population increase associated with new dwellings over that period is countered by reduction in the size of households existing homes during that same period.

# 4 LAND NEEDS ASSESSMENT

The land needs assessment applies the population and employment allocations to an estimate of the remaining land supply within each local municipality to determine whether, and to what extent, settlement area expansion(s) could be necessary. This analysis addresses both residential and employment-related settlement area land needs. The analysis also accounts for the County’s minimum intensification and density targets.

## 4.1 RESIDENTIAL ANALYSIS

The first step in determining residential land needs for each local municipality is to project residential dwelling growth within Settlement Areas (Appendix A). Growth estimates for the number of new dwellings within each local municipality were generated by MetroEconomics on the basis of the population allocations with input on the number of existing and planned dwelling units from WSP. The components were estimated based on a high-level review of building permits, development approvals and applications and a comparison of property assessment snapshots over time.

These estimates were further broken down into two categories: Within Settlement Areas (including Rural Settlements); and Outside Settlement Areas (rural areas excluding rural settlements), on the basis of Growth Plan policy direction and recent historical trends. The Growth Plan requires the vast majority of growth to be directed to Settlement Areas.

The results of this process are summarized in Exhibit 4: Projected Dwelling Growth Inside & Outside of Settlement Areas for each municipality as a whole as well as broken out into growth in dwellings in Urban Settlement Areas (i.e. Designated Greenfield Areas and Built-up Areas) and in Community Settlement Area (i.e. Rural Settlements).

**Exhibit 4: Projected Dwelling Growth Inside & Outside of Settlement Areas**

	<b>Total Dwelling Demand 2021 to 2051</b>	<b>% of Dwelling Units Outside Settlement Areas</b>	<b>Dwelling Units Outside Settlement Areas</b>	<b>Dwelling Units Inside Settlement Areas</b>
<b>Amaranth</b>	1,140	19%	216	924
<b>East Garafraxa</b>	354	26%	92	263
<b>Grand Valley</b>	2,445	0%	0	2,445
<b>Melancthon</b>	227	43%	99	129
<b>Mono</b>	180	55%	98	82
<b>Mulmur</b>	298	26%	79	219
<b>Orangeville</b>	3,620	0%	0	3,620
<b>Shelburne</b>	2,075	0%	0	2,075
<b>Dufferin County</b>	<b>10,339</b>	<b>6%</b>	<b>582</b>	<b>9,757</b>

This process results in the vast majority (94%) of dwelling growth projected to occur within Settlement Areas leaving approximately 6% of development associated with rural uses to the rural area.

The estimation of residential land needs differs depending on whether a municipality's settlement areas are urban settlement areas (i.e. with a delineated built-up area and/or designated greenfield area) or community settlement area (i.e. Rural Settlements). The GMS addresses each of these categories separately in the following subsections.

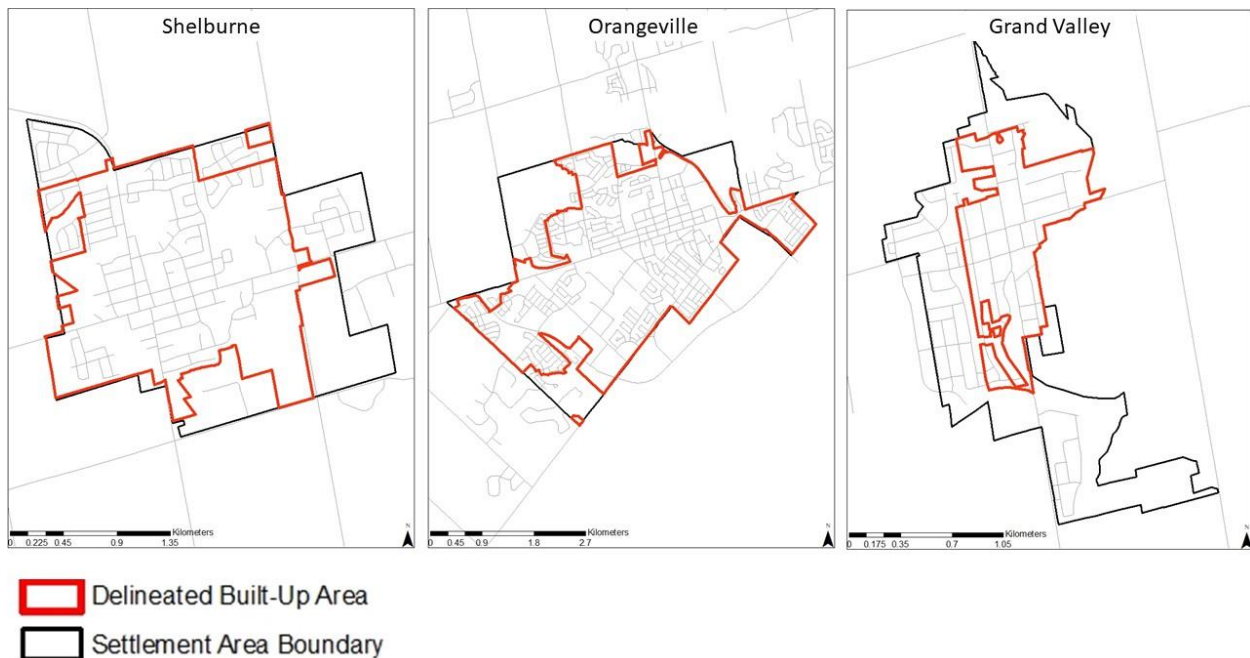
#### 4.1.1 URBAN SETTLEMENT AREAS

Dufferin County's Urban Settlement areas consist of a portion of the Town of Grand Valley, the entirety of the Town of Orangeville and the majority of the Town of Shelburne. The Urban Settlement Areas themselves are further divided into Delineated Built-up Area and Designated Greenfield Area under the Growth Plan. Residential development within the Delineated Built-up area is subject to the County's minimum intensification target under the Growth Plan. Non-industrial development within the Designated Greenfield Area is subject to the County's minimum greenfield density target under the Growth Plan.

##### 4.1.1.1 Urban Settlement Areas

Delineated Built-up Areas are specific areas within Dufferin County, shown in Exhibit 5: Delineated Built-up Areas in Dufferin County that are intended to receive the greatest share of growth and are subject to a minimum intensification target. Achieving increased intensification increases the theoretical capacity of the area to accommodate growth.

**Exhibit 5: Delineated Built-up Areas in Dufferin County**



For Dufferin County, the Growth Plan mandates a minimum intensification target of 40%, meaning that 40% of all new dwellings in the County are to occur within the delineated built-up areas. Currently, the

DCOP establishes individual intensification targets for Grand Valley at 12%, Orangeville at 50% and Shelburne at 38%, within each of their own delineated built-up areas.

As a result of updates to the Growth Plan since 2006, the current minimum intensification targets for Grand Valley, Orangeville and Shelburne are no longer sufficient to achieve the 40% County-wide intensification target. As identified in Section 4.1, Exhibit 4: Projected Dwelling Growth Inside & Outside of Settlement Areas, the land needs assessment projects that Dufferin County will need to grow by 10,339 dwelling units to accommodate the allocated population. As a result, Dufferin County will need to accommodate approximately 4,135 new dwellings in the delineated built-up area to achieve the County-wide target.

Based on the allocated population, the land needs assessment projects that Grand Valley will grow by 2,445 dwelling units between 2021 and 2051, Orangeville by 3,620 dwelling units and Shelburne by 2,075 dwelling units. On this basis, a one percent change in the intensification target would equate to a swing of approximately 24 dwelling units in Grand Valley, 36 dwelling units in Orangeville and 21 dwelling units in Shelburne. This means that each one percent change in the target for Orangeville would require a higher percentage increase in Shelburne or Grand Valley to compensate. It is also acknowledged that the size and nature of each delineated built-up area differs along with their ability to accommodate dwelling growth.

A potential intensification target scenario which would achieve the 40% County-wide intensification target would require Grand Valley to achieve a target of 40%, Orangeville to achieve a target of 60% and Shelburne to achieve a target of 48%. The GMS applied these percentage assumptions to Municipality-wide dwelling estimates detailed in Exhibit 4: Projected Dwelling Growth Inside & Outside of Settlement Areas to produce Exhibit 6: Potential Delineated Built-up Area Dwelling Capacity Shortage. This table also shows the estimated dwelling capacity remaining (Appendix A, Exhibit 15) in each delineated built-up area and the resulting shortfall in dwelling unit capacity relative to growth. This dwelling shortfall is converted into a corresponding land need in Section 6 Key Conclusions.

**Exhibit 6: Potential Delineated Built-up Area Dwelling Capacity Shortage**

	<b>Projected Dwelling Growth</b>	<b>Estimated Dwelling Capacity Remaining</b>	<b>Potential Dwelling Capacity Shortage</b>
<b>Grand Valley</b>	978	183	795
<b>Orangeville</b>	2,172	1,263	909
<b>Shelburne</b>	996	513	483
<b>Total</b>	4,146	1,959	2,187

This analysis has identified a potential shortage of residential land capacity in each of the built-up areas under the proposed growth scenario. To meet the County-wide intensification target the local municipalities will be required to allow for greater intensification within the existing built-up areas.

#### 4.1.1.2 Designated Greenfield Area

After directing sufficient Settlement Area growth to meet the intensification target, the balance of the Urban Settlement Area growth is to be accommodated in the designated greenfield areas. However, non-industrial (i.e. residential, commercial and institutional) development in the Designated Greenfield area is subject to a minimum density target which is defined in terms of a minimum number of people and jobs per hectare. This is important as achieving increased greenfield density increases the theoretical capacity of the area to accommodate growth.

The first step in assessing the residential capacity shortage in the designated greenfield area is to identify the shortage in terms of number of dwellings. This shortage is then converted into an equivalent number of residents and finally to a land need

The greenfield area dwelling shortage is shown in Exhibit 7: 2021 to 2051 Designated Greenfield Area Dwelling Supply Shortage. The estimated greenfield area demand in this table is calculated by subtracting the delineated built-up area dwelling growth (Exhibit 6: Potential Delineated Built-up Area Dwelling Capacity Shortage) from the overall Settlement Area dwelling growth (Exhibit 4: Projected Dwelling Growth Inside & Outside of Settlement Areas). The table also shows the estimated capacity remaining within those greenfield areas, and the resulting hypothetical capacity shortage.

**Exhibit 7: 2021 to 2051 Designated Greenfield Area Dwelling Supply Shortage**

	<b>Projected Dwelling Growth</b>	<b>Estimated Dwelling Capacity Remaining</b>	<b>Dwelling Capacity Shortage</b>
<b>Grand Valley</b>	1,452	961	491
<b>Orangeville</b>	1,448	1,153	295
<b>Shelburne</b>	1,079	398	681
<b>Total</b>	3,979	2,512	1,467

This analysis indicates a substantial potential dwelling capacity shortage in all three municipalities with Designated Greenfield Areas.

To convert the dwelling capacity shortage into a representative number of residents, the dwelling shortage was multiplied using new-build dwelling person per unit assumptions derived from recent Development Charges studies. The number of residents associated with the dwelling shortage was then multiplied by the current DCOP greenfield density targets for Grand Valley, Orangeville and Shelburne to generate a residential land need. The results of this process are as shown in Exhibit 8: Greenfield Residential Land Needs Projection. This process is intended to provide a baseline for the local municipalities to consider during implementation. It is expected that the local municipalities will determine their dwelling mix assumptions while maintaining or improving upon their existing dwelling mix. It is also recognized that the land needs would need to be refined to account for greenfield land area exclusions permitted by the Growth Plan as well as commercial and institutional employment considerations during implementation.



**Exhibit 8: Greenfield Residential Land Needs Projection**

	<b>Population Capacity Estimate</b>	<b>Minimum Resident &amp; Work From Home Jobs Per Hectare Assumption</b>	<b>Estimated Residential Land Need (Hectares)</b>
<b>Grand Valley</b>	1,680	44	38 + mapped environmental constraints
<b>Orangeville</b>	954	46	21 + mapped environmental constraints
<b>Shelburne</b>	2,429	41	59 + mapped environmental constraints
<b>Total</b>	5,063	43	118 + mapped environmental constraints

Exhibit 8: Greenfield Residential Land Needs Projection shows that Grand Valley will require an additional 38 gross hectares of land to be added to the settlement area to accommodate forecast residential demand. Orangeville would require 21 gross hectares at historic densities, however since the settlement area extends to the municipal boundary, the Town will instead need to increase densities to accommodate forecast residential growth. Shelburne will require 59 gross hectares but may be able to reduce that number through greater levels of intensification than has historically been seen in the Town.

**4.1.2 COMMUNITY SETTLEMENT AREAS (RURAL SETTLEMENTS)**

Community settlement area (i.e. rural settlements) land needs were accounted for in the original population allocation. No additional population was allocated beyond what the remaining residential settlement area land supply is estimated to be able to accommodate.

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**4.2 EMPLOYMENT ANALYSIS**

There are generally two categories of urban employment: industrial and community-serving (i.e. commercial and institutional). Planning for Industrial needs is a particular focus for the Provincial planning framework due to its foundational importance to local economies and the fact that lands suitable for accommodating such employment are limited in quantity and often require more effort and lead time to bring online relative to lands that are intended to accommodate residential, commercial and/or institutional uses.

A conservative analysis of whether there are adequate Settlement Area lands for these purposes compares the capacity of vacant lands designated in an Official Plan for these uses to projected growth.

Further work was undertaken on the employment allocation from Exhibit 3: Estimated Existing & Proposed to be Allocated Population & Employment to isolate No Fixed Place of Work and Work-From-Home employment components. Both these components need to be removed from the employment allocation in order to identify an employment-related land need. Land needs associated with the work-from-home component are already accounted for in the Residential Analysis and no fixed place of work employment does not require land to be allocated through the planning process. The remaining component that does have a land need is summarized in Exhibit 9: Projected Employment Growth with a Land Requirement between 2021 & 2051 (Jobs)

**Exhibit 9: Projected Employment Growth with a Land Requirement between 2021 & 2051 (Jobs)**

	<b>2021</b>	<b>2051</b>	<b>2021-2051</b>
<b>Amaranth</b>	669	1,347	678
<b>East Garafraxa</b>	347	548	200
<b>Grand Valley</b>	507	1,663	1,156
<b>Melancthon</b>	291	399	108
<b>Mono</b>	1,425	1,712	287
<b>Mulmur</b>	372	566	194
<b>Orangeville</b>	11,004	16,335	5,330
<b>Shelburne</b>	2,280	4,120	1,840
<b>Dufferin County</b>	<b>16,896</b>	<b>26,689</b>	<b>9,794</b>

Identifying a possible gap in employment capacity requires us to isolate growth in industrial as well as community-serving type jobs from the projections identified in Exhibit 9: Projected Employment Growth with a Land Requirement between 2021 & 2051 (Jobs) and then to compare the results to the capacity of vacant lands designated to accommodate such employment (Appendix A).

MetroEconomics employment projections included a breakout of employment with a place of work according to 2-digit North American Industry Classification System groups. These groupings are available for reference in Appendix A, Exhibit 17. As shown in Exhibit 17, the Study Team reassigned the job projections for each of these industry groups to an employment category of either Primary, Industrial, Commercial, or Institutional.

Applying these re-assignments allows us to estimate the number of Primary, Industrial, Commercial and Institutional jobs that exist in 2021 and to project the number that will exist in 2051. The resulting estimates are provided for reference in Appendix A, Exhibit 18. The projected growth between 2021 and 2051 resulting from this process is summarized in Exhibit 10: Projected Employment Growth by Employment Category between 2021 & 2051 (Jobs).

**Exhibit 10: Projected Employment Growth by Employment Category between 2021 & 2051 (Jobs)**

	<b>Primary</b>	<b>Industrial</b>	<b>Commercial</b>	<b>Institutional</b>	<b>Total Growth</b>
<b>Amaranth</b>	4	333	168	173	678
<b>East Garafraxa</b>	4	41	44	112	200
<b>Grand Valley</b>	1	273	599	282	1,156
<b>Melancthon</b>	5	25	52	25	108
<b>Mono</b>	3	69	176	39	287
<b>Mulmur</b>	2	43	101	48	194
<b>Orangeville</b>	2	455	2,670	2,203	5,330
<b>Shelburne</b>	2	271	516	1,050	1,840
<b>Dufferin County</b>	<b>24</b>	<b>1,510</b>	<b>4,326</b>	<b>3,933</b>	<b>9,794</b>

Another set of adjustments is then needed to identify the portion of the projected job growth that should locate in settlement areas on lands designated for industrial purposes versus those that should locate on lands designated for commercial, institutional or mixed-use purposes. This is necessary as a small portion of commercial and institutional jobs can still be required to support core industrial uses in industrial areas. Note that primary category jobs were not assigned to either area as this category refers to mining and agricultural employment that does not typically require lands within Settlement Areas.

For lands designated for industrial purposes, UrbanMetrics identified that it was reasonable to direct 100% of the projected industrial job growth in each municipality. However, urbanMetrics also identified that it was also reasonable to direct 5% of projected commercial job growth in Orangeville and 20% of projected commercial job growth in Shelburne to lands designated for industrial purposes based on the nature of the industries already present.

For lands designated for commercial, institutional or mixed-use purposes, UrbanMetrics identified that it was reasonable to direct 100% of the projected institutional job growth in each municipality and the remaining projected commercial job growth, i.e. 100% of projected commercial job growth in Amaranth, East Garafraxa, Grand Valley, Melancthon, Mono and Mulmur, 95% in Orangeville and 80% Shelburne.

The results of this final reassignment are summarized in Exhibit 11, representing the projected job growth requiring lands designated for Industrial and Commercial, Institutional or Mixed Use.

**Exhibit 11: Projected Job Growth Requiring Land in Settlement Areas between 2021 & 2051 (Jobs)**

	<b>Community Areas (Commercial, Institutional &amp; Mixed Use)</b>	<b>Industrial</b>	<b>Total</b>
<b>Amaranth</b>	341	333	674
<b>East Garafraxa</b>	156	41	197
<b>Grand Valley</b>	882	273	1,155
<b>Melancthon</b>	78	25	103
<b>Mono</b>	215	69	284
<b>Mulmur</b>	149	43	192
<b>Orangeville</b>	4,739	589	5,328
<b>Shelburne</b>	1,463	375	1,838
<b>Dufferin County</b>	<b>8,022</b>	<b>1,747</b>	<b>9,769</b>

Comparing the projected job growth in Exhibit 11: Projected Job Growth Requiring Land in Settlement Areas between 2021 & 2051 (Jobs) against the Settlement Area Employment Capacity (Appendix A, Exhibit 16) allows us to calculate the gap shown in Exhibit 12: Capacity Gap in Designated Settlement Area Lands for Employment Purposes (Jobs).

**Exhibit 12: Capacity Gap in Designated Settlement Area Lands for Employment Purposes (Jobs)**

	<b>Industrial</b>	<b>Community Areas (Commercial, Institutional &amp; Mixed Use)</b>
<b>Amaranth</b>	2,100 (Surplus)	-337
<b>East Garafraxa</b>	158 (Surplus)	-102
<b>Grand Valley</b>	-44	-823
<b>Melancthon</b>	99 (Surplus)	-78
<b>Mono</b>	588 (Surplus)	193 (Surplus)
<b>Mulmur</b>	372 (Surplus)	-62
<b>Orangeville</b>	420 (Surplus)	-3,437
<b>Shelburne</b>	403 (Surplus)	95 (Surplus)
<b>Dufferin County</b>	<b>4,098 (Surplus)</b>	<b>-4,551</b>

These results indicate a small potential shortage of industrial land supply in Grand Valley by 2051. On an aggregate basis there is sufficient employment land supply in any of the other local municipalities to accommodate this shortage however there may be local or site-specific considerations requiring a future industrial use to locate in Grand Valley.

## 4.2.1 INDUSTRIAL LAND NEED

Exhibit 12: Capacity Gap in Designated Settlement Area Lands for Employment Purposes (Jobs) shows that there may be a shortage of lands to accommodate 44 industrial jobs in Grand Valley by 2051. Applying the policy-based long-term industrial density assumption identified in Exhibit 19. Job per Net Hectare Density Assumptions in the Appendix of 21 industrial jobs per net hectare results in a potential land need of 2.1 net industrial hectares. Assuming that 80% of an industrial hectare is developable, this would translate to a potential land need of approximately 2.6 gross hectares plus environmental constraints.

As noted, on an aggregate basis, the other local municipalities within Dufferin County have sufficient employment land supply to accommodate the shortage of industrial land in Grand Valley, however there may be local or site-specific considerations that Grand Valley and the County should consider.

### 4.2.1.1 Conversion Potential

Exhibit 12: Capacity Gap in Designated Settlement Area Lands for Employment Purposes (Jobs) identified that there may be a surplus of industrial land supply in Orangeville representing approximately 420 jobs worth of capacity. As a result, there may be opportunity to consider the conversion of up to 20 net hectares of industrial land in Orangeville assuming that the industrial land supply to be retained will be developed at 21 jobs per net hectare on average. Consideration of any conversions would be subject to employment lands conversion policies.

Although Exhibit 12: Capacity Gap in Designated Settlement Area Lands for Employment Purposes (Jobs) identifies a potential surplus of industrial land supply in Shelburne on an aggregate basis, this includes speculative lands (typically sites reserved by existing industries for future expansion), which may not be available for new industries. Even if speculative sites are excluded, Shelburne has sufficient industrial supply to meet projected needs.

Employment land conversion is not recommended in the Rural Settlements as growth within them is to be limited and full municipal services are generally not available. The population allocations do not consider conversions in the rural settlements in line with policy direction to direct growth to the urban settlement areas where full services are or will be available.

## 4.2.2 POTENTIAL COMMUNITY AREA LAND NEED

Exhibit 12: Capacity Gap in Designated Settlement Area Lands for Employment Purposes (Jobs) identified that there may be a shortage of Commercial, Institutional and/or Mixed-use lands sufficient to accommodate projected growth in a number of the local municipalities. The policy-based long term community area density assumptions identified in Exhibit 9 in Section 2.1 were applied to the capacity gaps identified in the rural municipalities and Shelburne (since Shelburne may have a small surplus of lands designated for this purpose). The minimum greenfield density targets identified in Section 4.1.1.2 were applied to the job capacity gaps identified in Grand Valley and Orangeville. The resulting potential land needs are summarized in Exhibit 13: Potential Community Area (Commercial, Institutional or Mixed-use lands) Land Need.

Gross land need assumptions are also provided under the assumption that 80% of a commercial, institutional or mixed-use hectare is developable. Note that all these land need results would need to be expanded further to account for potential environmental constraints.

**Exhibit 13: Potential Community Area (Commercial, Institutional or Mixed-use lands) Land Need**

	<b>Net Hectares</b>	<b>Gross Hectares</b>
<b>Amaranth</b>	8.4	10.5
<b>East Garafraxa</b>	2.6	3.2
<b>Grand Valley</b>	14.9	18.7
<b>Melancthon</b>	2.0	2.4
<b>Mono</b>	4.8 (surplus)	6.0 (surplus)
<b>Mulmur</b>	1.5	1.9
<b>Orangeville</b>	59.8	74.7
<b>Shelburne</b>	1.9 (surplus)	2.4 (surplus)

The DCOP currently permits a full range of Community Area land uses within all urban and rural settlement areas. This analysis represents a high-level look at land needs that would require more detailed and specialized study to refine and address at the local level. This high-level analysis indicates a potential shortage of Commercial, Institutional or Mixed-use lands in Amaranth, East Garafraxa, Grand Valley, Melancthon, Mulmur and Orangeville. The shortages in Orangeville and Grand Valley will need to be considered within the overall land need calculus (i.e. residential and employment land needs). Amaranth, East Garafraxa, Melancthon and Mulmur will need to address these shortages through updates to local land use policies and zoning regulations, noting that existing commercial and institutional employment densities are generally very low in the rural municipalities.

# 5 DESIGNATED GREENFIELD DENSITY TARGET ANALYSIS

This section provides an integrated analysis of residential and commercial / institutional employment factors with respect to appropriate minimum designated greenfield area density targets for Grand Valley, Orangeville and Shelburne. The analysis is primarily based on:

- Comparison to the estimated residential density that the current greenfield areas have been planned to achieve.
- The fact that Orangeville's settlement areas have already reached its corporate municipal limit.
- The fact that Shelburne West expansion area represents the final expansion area remaining in Shelburne's corporate boundary.

The existing County-wide minimum density target of 40 people and jobs per gross hectare (exclusive of mapped environmental constraints noted in the 2006 Growth Plan) is measured as an average across all Designated Greenfield Areas of the County by the end of the Forecast period. Note that lands permitted to be excluded from the calculation of this target were updated in the current Growth Plan.

The current targets for Grand Valley, Orangeville and Shelburne are 44, 46 and 41 people and jobs per gross hectare, respectively (exclusive of mapped environmental constraints noted in the 2006 Growth Plan).

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## 5.1 GRAND VALLEY

Grand Valley's existing greenfield area is approximately 125 hectares in size, after accounting for permitted exclusions (i.e. mapped environmental constraints, cemeteries, etc.). To achieve its minimum Designated Greenfield Density target of 44 people and jobs per hectare, Grand Valley needs to accommodate approximately 5,500 people and jobs by 2051 within its Designated Greenfield Area.

Grand Valley's existing designated greenfield area is currently estimated to be able to achieve approximately 35.1 people and jobs per hectare based on residents and work from home jobs. Lands designated for Commercial and Institutional purposes are estimated to be able to contribute up to a further 72 jobs, resulting in a combined estimated density of approximately 35.7 people and jobs per hectare. Factoring potential population decline as households age could result in a decrease to approximately 35.2 people and jobs per hectare.

Grand Valley's Designated Greenfield Area would need to accommodate at least a further 1,038 residents and/or jobs to achieve its minimum designated greenfield area target of 44 people and jobs per hectare.

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## 5.2 ORANGEVILLE

Orangeville's existing greenfield area is approximately 153 hectares in size, after accounting for permitted exclusions (i.e. mapped environmental constraints, cemeteries, etc.). To achieve its minimum Designated Greenfield Density target of 46 people and jobs per hectare, Orangeville needs to accommodate approximately 7,038 people and jobs by 2051 within its Designated Greenfield Area.



Orangeville's existing designated greenfield area is currently estimated to be able to achieve approximately 43.2 people and jobs per hectare based on residents and work from home jobs. Lands designated for Commercial and Institutional purposes are estimated to be able to contribute up to a further 961 jobs resulting in a combined estimated density of approximately 49.5 people and jobs per hectare. Factoring potential population decline as households age could result in a decrease to approximately 46.4 people and jobs per hectare. On this basis, it is likely that Orangeville will meet and exceed its existing target of 46 people and jobs per hectare.

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## 5.3 SHELBURNE

Shelburne's existing greenfield area is approximately 88 hectares in size, after accounting for permitted exclusions (i.e. mapped environmental constraints, cemeteries, etc.). To achieve its minimum Designated Greenfield Density target of 41 people and jobs per hectare, Shelburne needs to accommodate approximately 3,608 people and jobs by 2051 within its Designated Greenfield Area.

Shelburne's existing designated greenfield area is currently estimated to be able to achieve approximately 41.8 people and jobs per hectare based on residents and work from home jobs. Lands designated for Commercial and Institutional purposes are estimated to be able to contribute up to a further 762 jobs resulting in an estimated combined density estimate of approximately 50.5 people and jobs per hectare. Factoring potential population decline as households age could result in a decrease to approximately 48.7 people and jobs per hectare. On this basis, it is likely that Shelburne will meet and exceed its existing target of 41 people and jobs per hectare.

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## 5.4 DUFFERIN COUNTY

Dufferin County's existing designated Greenfield Area is currently estimated to be able to achieve approximately 40.1 people and jobs per hectare based on residents and work from home jobs. Lands designated for commercial and institutional purposes are estimated to be able to contribute up to a further 1,795 jobs resulting in a final combined density estimate of approximately 45.0 people and jobs per hectare in the Designated Greenfield Area. Factoring potential population decline as households age could result in a decrease to approximately 43.1 people and jobs per hectare. On this basis, it is likely that Dufferin will meet and exceed its existing target of 40 people and jobs per hectare.

# 6 KEY CONCLUSIONS

The land needs assessment described in the preceding sections of this report has provided the basis for the following conclusions and recommendations. The population and employment allocations for each local municipality, intensification and density targets required to accommodate the allocated growth and recommended land area required for settlement area expansions will inform the remaining steps in the Municipal Comprehensive Review.

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## 6.1 ALLOCATIONS

Population and employment growth has been directed to the urban settlement areas to the maximum extent possible. Residential growth was first allocated to each municipality based on servicing potential input from Orangeville and Shelburne, current levels of development occurring outside of settlement areas, and the remaining residential capacity in the Rural Settlements. The remaining growth was then allocated to Grand Valley.

The land needs assessment confirms that current density levels in Grand Valley, Orangeville and Shelburne are insufficient to accommodate the allocated growth within the existing land supply. To address this, settlement area expansions are recommended for Grand Valley and Shelburne. New development in Orangeville will need to be achieve higher densities than currently exist.

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## 6.2 MINIMUM INTENSIFICATION TARGETS & THE DELINEATED BUILT-UP AREA

The 40% minimum intensification rate for the County as a whole is required, under the Growth Plan, to be maintained. To achieve this target, Grand Valley, Orangeville and Shelburne will need to update their local land use policies and regulations to permit higher densities of development within their delineated built-up areas.

Based on the land needs assessment scenario targets of 40% for Grand Valley, 60% for Orangeville and 48% for Shelburne, approximately 2,187 dwelling units of additional capacity are projected to be needed in the Delineated Built-up Area to achieve the intensification target. At these intensification levels, Orangeville is projected to need to identify 909 dwelling units of additional capacity, Grand Valley 795 units and Shelburne 483 units.

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## 6.3 GREENFIELD LAND NEEDS

Grand Valley, Orangeville and Shelburne each were identified to have substantial greenfield residential land needs. The settlement areas of Grand Valley and Shelburne should be expanded, where as Orangeville should consider permitting greater densities to accommodate forecast growth.

The 40 persons and jobs per hectare minimum Greenfield Density target for the County will be maintained as required by the Growth Plan, as will the current municipality-specific targets of 46 for Orangeville and 41 for Shelburne. Any Settlement Area Expansion for Grand Valley will achieve a minimum of 44 people and jobs per hectare.

#### Exhibit 14: Combined Greenfield Land Needs

	<b>Residential Land Need (Gross Hectares)</b>	<b>Community Area Land Need (Gross Hectares)</b>	<b>Combined Land Needs (Gross Hectares)</b>
<b>Grand Valley</b>	38	19	57 + mapped environmental constraints
<b>Orangeville</b>	21	75	96 + mapped environmental constraints
<b>Shelburne</b>	59	0	59 + mapped environmental constraints
<b>Hypothetical Rural if Addressed in Greenfield Area</b>	0	14	14 + mapped environmental constraints
<b>Hypothetical Total</b>	<b>118</b>	<b>108</b>	<b>226 + mapped environmental constraints</b>

### 6.3.1 COMMERCIAL & INSTITUTIONAL PROJECTIONS

Orangeville may have a substantial shortage of commercial and institutional land supply that should be addressed through an update to its Official Plan and Zoning By-law. Grand Valley and Shelburne should consider Town-wide Commercial and Institutional land needs in addition to localized needs as they undertake their Official Plan updates.

Up to a further 14 hectares of land plus mapped environmental constraints should be considered if commercial, institutional and mixed-use employment needs in the rural settlement areas cannot be addressed locally and need to be addressed as part of any urban Settlement Area expansion.

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## 6.4 INDUSTRIAL LAND NEEDS

Up to 2.6 hectares of land, plus mapped environmental constraints, may be needed in Grand Valley to meet projected industrial needs.

### 6.4.1 CONVERSION

Orangeville may consider opportunities for site-specific conversions totalling up to 20 net hectares subject to conversion criteria and ensuring that their remaining long-term employment lands will achieve 21 jobs per net hectare on average. Conversions within the delineated built-up area may allow the Town to achieve its intensification targets at relatively lower densities.

Grand Valley and Shelburne should continue to monitor their employment land supplies and ensure that their employment supply can achieve 21 jobs per net hectare on average.

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## 6.5 CONCLUSIONS BY MUNICIPALITY

### 6.5.1 AMARANTH

The Township of Amaranth is primarily rural. Communal and/or full wastewater services are not available. The land needs analysis has determined there are sufficient lands available to accommodate future population and employment growth allocated to the Township.

### **6.5.2 EAST GARAFRAXA**

The Township of East Garafraxa is primarily rural. Communal and/or full wastewater services are not available. Partial services are available in some settlement areas. The land needs analysis has determined there are sufficient lands available to accommodate future population and employment growth allocated to the Township without expansions of the settlement areas.

### **6.5.3 GRAND VALLEY**

A residential supply gap has been identified in Grand Valley to meet projected needs. A Settlement Area expansion is recommended to accommodate the residential supply gap in addition to continued efforts to promote higher density development within the existing greenfield area and delineated Built-Up Area.

It is unlikely that Grand Valley could accommodate an intensification target beyond the scenario intensification target of 40% already applied by the land needs assessment. For reference, the existing DCOP intensification target is 18% and Grand Valley has the smallest delineated built-up area of the three urban settlement areas.

At the existing minimum designated greenfield density target of 44 people and jobs per hectare, 38 hectares of land plus mapped environmental constraints are needed in Grand Valley to meet projected residential needs and up to a further 19 hectares of land plus mapped environmental constraints may be needed to meet commercial, institutional and mixed-use employment needs.

If additional greenfield area cannot be brought online through expansion or conversion, the existing greenfield area would be forced to exceed 48 people per hectare before accounting for additional community area employment associated with the increased population. For reference, it is estimated that Grand Valley's existing greenfield area is currently only able to reach approximately 35.2 people and jobs per hectare inclusive of community area employment.

### **6.5.4 MELANCTHON**

The Township of Melancthon is primarily rural. Communal and/or full wastewater services are not available. The land needs analysis has determined there are sufficient lands available to accommodate future population and employment growth allocated to the Township.

### **6.5.5 MONO**

The Township of Mono is primarily rural. Improvements to communal and/or full wastewater services are not planned to accommodate growth beyond the allocation. The land needs analysis has determined there are sufficient lands available to accommodate future population and employment growth allocated to the Township.

### **6.5.6 MULMUR**

The Township of Mulmur is primarily rural. Communal and/or full wastewater services are not available. The land needs analysis has determined there are sufficient lands available to accommodate future population and employment growth allocated to the Township.

### **6.5.7 ORANGEVILLE**

A residential supply gap has been identified in Orangeville to meet projected needs. It is recognized that the Orangeville Settlement Area already encompasses that Town's entire corporate boundary.

The land needs analysis has applied an intensification target of 60% for Orangeville. For reference, the existing DCOP intensification target is 50%.

At the existing minimum designated greenfield density target of 46 people and jobs per hectare, 21 hectares of additional land, plus mapped environmental constraints, would be needed in Orangeville to meet projected residential needs, and up to a further 75 hectares of land plus mapped environmental constraints would be needed to meet commercial, institutional and mixed-use employment needs. Orangeville's Settlement Area already occupies the entirety of its corporate municipal boundary, meaning that higher densities of development will be required to accommodate allocated growth.

If additional greenfield area cannot be brought online through conversion, the existing greenfield area will need to accommodate 49 people and jobs per hectare before accounting for additional community area employment associated with the increased population. For reference, the current comparable greenfield density is estimated to be 43.2 people and jobs per hectare, only rising to 46.4 people and jobs per hectare after potential community area employment is factored in.

### **6.5.8 SHELBURNE**

A residential supply gap has been identified in Shelburne to meet projected needs. It is recommended that Settlement Area Expansion is required to accommodate this greenfield gap while continued efforts are undertaken to promote compact and higher density development within the existing greenfield area and delineated built-up area.

It is unlikely that Shelburne could accommodate an intensification target beyond the scenario intensification target of 48% already applied by the land needs assessment. For reference the existing DCOP intensification target is 38%. Additionally, although Shelburne's delineated built-up area is larger than Grand Valley's both are substantially smaller than Orangeville's.

At the existing minimum designated greenfield density target of 41 people and jobs per hectare, 59 hectares of land plus mapped environmental constraints will be needed in Shelburne to meet projected residential needs.

The Shelburne West Expansion Area represents approximately 86 gross hectares of land of which approximately 23 hectares overlap features that are permitted to be excluded from the calculation of the minimum designated greenfield density target (i.e. mapped natural heritage constraints, cemeteries and railway corridors). Approximately 63 hectares of the expansion area would therefore be subject to the minimum designated greenfield density target if a full expansion is implemented.

If additional greenfield area cannot be brought online through expansion, the existing greenfield area will need to exceed 69 people per hectare before accounting for additional community area employment associated with the increased population. For reference, the current comparable greenfield density is estimated to be 41.8 people and jobs per hectare, only rising to 48.7 people and jobs per hectare after potential community area employment is factored in.

# APPENDIX A: SUPPORTING ASSUMPTIONS

## 1.1 SETTLEMENT AREA DWELLING CAPACITY

WSP worked with the County and the local municipalities to generate an estimate of the capacity of each of the Settlement Areas to accommodate new dwelling units based on current context and planning policies. These estimates were compiled from local municipal input and consider factors such as:

- Existing land use (based primarily on the Municipal Property Assessment Corporation property code and local input). Properties with a vacant property code were included. Properties with a rural or agricultural code within a Settlement Area were verified with the local municipality as to whether they should be included. Properties with a developed (i.e. non-vacant code) were only included if identified by the local municipality as having intensification potential.
- Official Plan land use designation (i.e. candidate parcels must permit residential dwellings as a primary use);
- Physical size, number of parcels, configuration (i.e. shape) and servicing availability (i.e. road frontage, water and wastewater) of available parcels, as well as mapped environmental constraints; and,
- The number and type (i.e. low, medium or high density) of dwelling units proposed in both proposed and recently approved planning applications.

The results of the dwelling unit capacity analysis are summarized in the table below (Exhibit 15). The results are further differentiated into the capacity located within the Delineated Built-Up Area and the capacity located within the Designation Greenfield Area. Please note that this estimate is a snapshot in time representing the estimated remaining dwelling unit capacity as of approximately mid-2021 based on recent trends and current planning policies. Additional capacity could be achieved if the local municipalities are able to achieve more compact development and redevelopment.

*Exhibit 15. Estimated Settlement Area Dwelling Unit Capacity as of Mid-2021*

	Settlement Area	Delineated Built-Up Area				Designated Greenfield Area			
		All Types	All Types	Low Density	Medium Density	High Density	All Types	Low Density	Medium Density
AM	926								
EG	265								
GV	1,144	183	138	27	18	961	716	181	64
ME	129								
MO	78								
MU	217								
OR	2,416	1,263	22	271	970	1,153	203	467	483
SH	911	513	176	267	70	398	205	117	76
DC	<b>6,086</b>	<b>1,959</b>	<b>336</b>	<b>565</b>	<b>1,058</b>	<b>2,512</b>	<b>1,124</b>	<b>765</b>	<b>623</b>

## 1.2 SETTLEMENT AREA EMPLOYMENT CAPACITY ON VACANT LANDS

Estimating the capacity of vacant appropriately designated lands within Settlement Areas starts with identifying the magnitude of those lands in terms of area. WSP worked with the local municipalities to identify these parcels, the results of which are summarized in Exhibit 16. Note that these results are given as estimated net hectares which exclude mapped environmental constraints, and which assume that only 80% of the area of parcels larger than 2 hectares in size are developable. Detailed results representing short-term lands (vacant parcels with applications or recent approvals), long-term lands (vacant parcels that do not have any applications on them) and speculative (typically vacant portions of larger parcels that have been identified through local input).

*Exhibit 16. Estimated Vacant Settlement Area Lands Designated for Industrial and Commercial / Institutional Uses as of Mid-2021*

	Vacant Industrial Employment Lands (Estimated Net Hectares)				Vacant Commercial & Institutional Lands (Estimated Net Hectares)			
	Total	Short-term	Long-term	Speculative	Total	Short-term	Long-term	Speculative
<b>AM</b>	166.68	40.05	126.63		0.09		0.09	
<b>EG</b>	11.73		11.73		1.34		1.34	
<b>GV</b>	10.90		10.90		1.26	0.36	0.90	
<b>ME</b>	7.32		7.32		-			
<b>MO</b>	39.30	1.08	38.22		10.97	1.19	9.78	
<b>MU</b>	24.40	1.65		22.74	2.18		2.18	
<b>OR</b>	51.61	18.71	32.50	0.41	26.14	4.93	13.41	7.80
<b>SH</b>	44.31	19.07	12.31	12.94	41.74	22.06	18.98	0.70
<b>DC</b>	<b>356.24</b>	<b>80.55</b>	<b>239.60</b>	<b>36.09</b>	<b>83.72</b>	<b>28.54</b>	<b>46.68</b>	<b>8.50</b>

## 1.3 BASED EMPLOYMENT ASSUMPTIONS

*Exhibit 17. Re-assigning Employment Projections from NAICS categories to LNA Employment Categories*

2-digit NAICS Industry Code and Description		LNA Employment Category
11	Agriculture, forestry, fishing & hunting	Primary
21	Mining, quarrying, & oil & gas extraction	Primary
22	Utilities	Industrial
23	Construction	Industrial
31	Manufacturing	Industrial
41	Wholesale trade	Industrial
44	Retail trade	Commercial
48	Transportation, warehousing	Industrial
51	Information & cultural industries	Commercial
52	Finance & insurance	Commercial
54	Professional, scientific & technical services	Commercial
53, 55, 56	Other business services	Commercial
61	Educational services	Institutional
62	Health care & social assistance	Institutional
71	Arts, entertainment & recreation	Commercial
72	Accommodation & food services	Commercial
81	Other services	Commercial
91	Public administration	Institutional

*Exhibit 18. Projected Industrial, Commercial & Institutional Employment in 2021 & 2051.*

	2021					2051				
	Prim.	Ind.	Com.	Inst.	Total	Prim.	Ind.	Com.	Inst.	Total
<b>AM</b>	53	353	144	120	669	57	685	311	293	1,347
<b>EG</b>	42	95	96	114	347	46	136	140	226	548
<b>GV</b>	14	125	255	113	507	15	398	854	395	1,663
<b>ME</b>	59	102	98	32	291	64	128	150	58	399
<b>MO</b>	41	293	934	158	1,425	44	362	1,110	197	1,712
<b>MU</b>	27	84	171	90	372	29	127	272	137	566
<b>OR</b>	28	1,927	5,889	3,160	11,004	30	2,382	8,559	5,363	16,335
<b>SH</b>	28	712	681	859	2,280	30	984	1,197	1,909	4,120
<b>DC</b>	292	3,691	8,267	4,646	16,896	316	5,201	12,593	8,579	26,689



**Exhibit 19. Job per Net Hectare Density Assumptions**

	Industrial Employment		Commercial & Institutional	
	Short-term	Long-term & Speculative	Short-term	Long-term & Speculative
<b>AM</b>	7.00	17.00	9.00	40.00
<b>EG</b>	5.00	17.00	14.00	40.00
<b>GV</b>	15.00	21.00	40.00	50.00
<b>ME</b>	14.00	17.00	7.00	40.00
<b>MO</b>	7.00	17.00	14.00	40.00
<b>MU</b>	17.00	17.00	13.00	40.00
<b>OR</b>	17.00	21.00	49.00	50.00
<b>SH</b>	13.00	21.00	26.00	50.00

Applying the density assumptions to the vacant area estimate generates the estimated settlement area employment capacity for lands designated for industrial and commercial and institutional purposes as shown in Exhibit 20.

**Exhibit 20. Estimated Employment Capacity of Vacant Settlement Area Lands Designated for Industrial & Commercial & Institutional Purposes as of Mid-2021.**

	Industrial Employment Capacity (Jobs)				Commercial & Institutional Employment Capacity (Jobs)			
	Total	Short-term	Long-term	Speculative	Total	Short-term	Long-term	Speculative
<b>AM</b>	2,433	280	2,153	-	4	-	4	-
<b>EG</b>	199	-	199	-	54	-	54	-
<b>GV</b>	229	-	229	-	59	14	45	-
<b>ME</b>	124	-	124	-	-	-	-	-
<b>MO</b>	657	8	650	-	408	17	391	-
<b>MU</b>	415	28	-	387	87	-	87	-
<b>OR</b>	1,009	318	682	9	1,302	242	671	390
<b>SH</b>	778	248	258	272	1,558	574	949	35
<b>DC</b>	<b>5,845</b>	<b>882</b>	<b>4,296</b>	<b>667</b>	<b>3,471</b>	<b>846</b>	<b>2,200</b>	<b>425</b>

# APPENDIX B: LAND SUPPLY MAPS