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MEMORANDUM

To:	Adrian Smith, Region of Peel
CC:	Duran Wedderburn, Region of Peel
From:	Russell Mathew
Date:	April 28nd, 2022
Re:	Update to Land Needs Assessment Arising from Strategic Decisions to Finalize Proposed Region of Peel Official Plan Amendment as Part of *Peel 2051*

The Municipal Comprehensive Review (MCR) is the Region of Peel Official Plan Review process, where Peel will bring its plan into conformity with *A Place to Grow: Growth Plan for the Greater Golden Horseshoe*, 2019, as amended in 2020 (Growth Plan). There were changes to a number of policies in the 2019 Growth Plan from prior versions. Amendment 1 in 2020 extended the planning horizon to 2051 and established new growth forecasts that are minimum levels of population and employment to which Greater Golden Horseshoe (GGH) upper- and single-tier municipalities are required to plan to achieve. The Province also set a July 1st, 2022 date for the conformity amendments to be completed and adopted by Council.

Peel is now required to plan for growth to a population of 2,280,000 and employment of 1,070,000 by 2051. This replaces the 1,640,000 population and 870,000 employment forecasts for 2031 in Peel's current Official Plan, as established by the original Growth Plan (2006).

A key part of the MCR process is the Land Needs Assessment (LNA), which must be prepared in accordance with Province's *Land Needs Assessment Methodology*, 2020. In addition to determining urban land needs to accommodate future population and employment growth to 2051 the LNA provides technical background information on intensification, greenfield density, Employment Area conversions, Employment Area density, local municipal growth allocations, and other quantitative elements of Growth Plan conformity.

Peel prepared a draft LNA in October 2021 and Spring 2022 update based on the key growth management approaches, principles, targets and conclusions that were then being established through a Regional Council process. Establishing these foundations allowed the MCR to proceed to public consultation, the preparation of draft Official Plan amendments, and the finalization of many other policies and targets embedded in the MCR work. The LNA was then updated in the Spring of 2022 in response to Provincial comments on the LNA.

Peel's responsiveness to public feedback, as well as the desires of its local municipal partners, updates and revisions to the technical background work, the recent passing of Minister's Zoning Orders (MZO), and several strategic directions provided by Council, had led to several changes to various inputs and assumptions in the LNA. Most of those are just now before Council, the recommendations having been supported by Planning and Growth Management Committee on April 7th, 2022 adopted by Council on April 28th, 2022.

Summary of Key Adjustments:

- 100 hectares of Community Area land in the existing Designated Greenfield Area changed to Employment Area, resulting in a net addition to DGA Employment Area land and a net reduction in DGA Community Area land.
- 130 hectares of Community Area land in the SABE changed to Employment Area
- 230 ha of an employment land supply contingency to allow for a possible lower employment density at development, choice in location and site size and to accommodate some potential conversions of existing Employment Areas in select Major Transit Station Areas in accordance with policies established through the MCR and other strategic areas identified through a future phase of the MCR.
- In the SABE Community Area, the reduced land area of 130 hectares results in the adoption of an updated DGA density target for new areas of 67.5 persons plus jobs per hectare, a minor change from the 65 assumed in the LNA documents.

- The minimum density target for existing Designated Greenfield Area (DGA) land in Peel is adjusted from 71 residents and jobs per hectares to 72 residents and jobs per hectare, and the minimum density target of 70 residents and jobs per hectare is maintained

While the above adjustments are described from an LNA perspective, they are specific revisions to the proposed Peel Official Plan to make it a better plan for Peel and its local municipalities. From a Region-wide LNA perspective the changes are minor and do not affect any of the fundamental conclusions in the LNA. Material changes in assumptions and development expectations are set out in this memorandum both as a matter of record and to demonstrate the minor effect they would have on the LNA work.

Technical Memo

This memorandum starts with a reminder of the main conclusion of the LNA and is following by a series of short sections setting out changes in assumptions and their overall effects. A more substantial analysis of the implications of Peel's proposed flexible policy on employment land conversions in the MTSA, and how it fits with the LNA Employment Area conclusions, follows. The memorandum concludes by restating the major conclusion in the LNA tables and showing any adjustments made in a series of tables.

A. MAJOR CONCLUSIONS OF THE LNA

The October 2021 LNA and Spring 2022 update report demonstrates that to accommodate the forecast of 2,280,000 people and 1,070,000 jobs in Peel by 2051, additional urban land is required through a Settlement Area Boundary Expansion (SABE). The SABE lands that will become part of Peel's Designated Greenfield Area (DGA) allow the Region to provide for a range and mix of housing types and a variety of employment opportunities. The main conclusions of the LNA and related policies for the Region as whole and for the SABE are shown in the following tables.

Peel's Balanced Approach to Growth Management

Population Growth, 2021–2051	700,000 people
Employment Growth, 2021–2051	335,000 jobs
Housing Need, 2021–2051	271,000 housing units
Intensification Rate	Minimum of 55% of all new housing units to be built within the Delineated Built-Up Area (DBUA), Region-wide
Designated Greenfield Area density	Minimum 70 residents and jobs per hectare of Community Area DGA, Region-wide
Employment Area Density for the Regional Employment Area Density Target	Minimum of 42 jobs per developable hectare of Employment Area, Region-wide

Settlement Area Boundary Expansion

SABE Housing Need to 2051	195,000 residents and jobs
SABE Housing Need to 2051	50,000 housing units
SABE Employment Area Jobs	40,000 jobs
SABE Community Area Land Need	3,000 hectares
SABE DGA Employment Area Land Need	1,400 hectares
SABE Designated Greenfield Area Density	Minimum 65 residents and jobs per hectare of Community Area DGA
SABE DGA Employment Area Density[1]	28 jobs per hectare
Employment Area Density Target Combining Existing Employment Area and SABE Lands	Minimum of 40 jobs per developable hectare, Region-wide

B. MINOR CHANGE IN THE RURAL AREA HAS NO EFFECT ON LNA

About 25 units may be added to the Caledon Village rural settlement area and two other small hamlet expansions in Inglewood and Palgrave Village have been requested

There is a proposal as part of a quarry rehabilitation plan to add a 93-unit subdivision in the southwest corner of the Caledon Village settlement area. The proposal is that 68 of the units would be within the existing Caledon Village settlement area and the other 25 units on a 12-hectare rural settlement area boundary expansion. From a land needs perspective, the allocation work underlying

[1] For the purposes of determining the amount of new urban Employment Area land needed in the SABE area, an employment density of 26.4 jobs per developable hectare is applied to the Employment Land Employment that is not accommodated within the existing urban area. The LNA shows a need for lands to accommodate 36,500 Employment Land Employment jobs. At 26.4 jobs per developable ha, this amounts to 1,380 hectares. Adding in a 3% long-term land vacancy, a total 1,420 hectares are needed, rounded to 1,400 hectares in most reporting.

For calculating the total employment density after developed, Major Office Employment in the Employment Areas needs to be added, bringing the total to 39,000 jobs (36,500 Employment Land jobs + 2,500 Major Office jobs = 39,000 jobs). The 39,000 jobs over the 1,400 hectares of new employment area results in a total 2051 employment density of 27.9 jobs per developable hectare.

the land needs assessment anticipates some infill development occurring in the rural hamlets.

In the case of Caledon Village, 90 additional units were assumed over the planning period. The allocation was a high level estimate based on some vacant land being available within the Caledon Village boundary and was not based on available infrastructure capacity or any other factor that might limit growth below 90 units or encourage it above 90 units (that is, except for Greenbelt Plan policies on how and when a hamlet expansion may be permitted). While adding lands to a hamlet is a settlement area expansion, this proposal is within the rural area and the rural growth allocation so it cannot be part of the DGA expansion calculations in the LNA. Even if the lands were to be considered DGA, in the context of the SABE area in Caledon accommodating some 235,000 persons and jobs, 25 units housing about 75 people is less than the rounding of the figures in the overall growth projections.

Small hamlet expansions are addressed by the Greenbelt Plan and would need to conform to that plan.

Two other small potential hamlet expansions may also be considered in Inglewood and Palgrave Village, both of which are smaller than the one in Caledon Village. The same conclusions apply to these concerning the expansion, its lack of effect on the LNA and need to conform to the Greenbelt Plan.

As such, if the Region and Town of Caledon wish to approve the proposed minor hamlet expansions and development, the approval would have no effect on the LNA results.

C. CHANGES IN THE EXISTING DESIGNATED GREENFIELD AREA

Within the existing DGA, there is a change in the amount of Community Area and Employment Area in Caledon. The land area has future development associated with it and is described in the table following.

Changes in the Existing DGA in Caledon

	Change in Existing DGA Community Area	Change in Existing DGA Employment Area
The lands known as the ROPA 30 Option 6 lands are bounded by Humber Station Road, Healy Road, the existing urban boundary and Mayfield Road. The lands are made up of 30.8 ha of Employment Area on the "triangle lands" in the southeast corner of the area, 3.4 ha of Employment Area on the south side of the Highway 413 corridor and another 26.0 ha on the north side of the corridor. The remaining 95.8 ha were originally assumed to be in the Community Area, but being surrounded by Employment Area on all sides, the lands would now be within the Employment Area, adding the 95.8 ha and a corresponding reduction in Community Area. The intention is to keep the population and the population-related employment inside the existing DGA area, mainly through higher density development near the proposed Bolton GO Station. The will result in an increase in the existing DGA density in Caledon and the Peel	(96) ha	+96 ha
Total change in Caledon land areas	**(96) ha**	**+96 ha**

As a result of this change, there is a change in land area in Caledon that is required for the purposes of calculating the DGA Community Area density. The information that would be affected in the LNA is in Table 23. The density calculation section of Table 23 for 2021 and 2051 are reproduced below to highlight the affected calculation of the existing DGA density.

This land area change from Community Area to Employment Area has the effect of increasing the Region-wide existing DGA density from 71 to 72 residents and jobs per hectare at 2051. This result continues to support the DGA density target policy of a 2051 density of 70 residents and jobs per hectare.

Excerpt with revisions of LNA Table 23 – Existing Capacity and Development Potential in Designated Greenfield Areas by Local Municipalities 2021-2051

Existing Capacity and Development Potential in Designated Greenfield Areas by Local Municipality 2021-2051				
	Mississauga	Brampton	Caledon	Peel
Total Persons plus Jobs in Community Designated Greenfield Area, 2021	16,200	187,300	16,300	219,000
Developable Community Land Area for Density Calculation, per Growth Plan definition (ha)	**280**	**5,700**	**950**	**6,900**
Developable Land Area for Density Calculation, per Growth Plan Definition (ha), excluding undevelopable lands	270	5,500	920	6,700
Designated Greenfield Area, Community Area Density in person + jobs per ha, 2021	**58**	**33**	**17**	**32**
Designated Greenfield Area, Community Area Density in person + jobs per ha, 2021, excluding undevelopable lands	60	34	18	33
Total Person plus Jobs in Community Designated Greenfield Area, 2051	25,500	409,100	60,900	495,500
Developable Land Area for Density Calculation, per Growth Plan Definition (ha)	**280**	**5,700**	**950**	**6,900**
Developable Land Area for Density Calculation, per Growth Plan Definition (ha), excluding undevelopable lands	270	5,500	920	6,700
Designated Greenfield Area, Community Area Density in person + jobs per ha, 2021	**91**	**72**	**64**	**72**
Designated Greenfield Area, Community Area Density in person + jobs per ha, 2051, excluding undevelopable lands	94	74	66	74

Source: Hemson Consulting, 2022

Note: Undevelopable lands include the GTA West corridor within the existing DGA in Brampton and Caledon and the Ninth Line Transitway in Mississauga.

D. CHANGES IN USE WITHIN IN THE PROPOSED SETTLEMENT AREA BOUNDARY EXPANSION LANDS

The overall new urban land area in the proposed SABE is 4,400 hectares as shown in the LNA Report and mapped in the SABE documents presented to Council in October 2021. This comprised 3,000 hectares of Community Area and 1,400 hectares of Employment Area. A number of small changes were made to these areas, including:

- Enlarging the small Employment Area at Alloa to provide a more rational land use boundary;
- Shifting the boundary between Community Area and Employment Area in the vicinity of Heart Lake Road and Old School Road;
- Shifting the boundary between Community Area and Employment Area on Dixie Road, south of Old School Road from Dixie Road itself to a boundary about 300 metres east of Dixie Road;
- Describing about 20 hectares of Employment Area on the immediate southwest boundary of Campbell's Cross to act as a transition area between the residential community and the large Employment Area to the southwest.

The result is a net reduction of 130 hectares of Community Area land from 3,000 hectares in the fall of 2021 to the currently proposed 2,870 hectares. The changes also result in an increase in Employment Area land from 1,400 hectares to 1,530 hectares for a total of 4,400 hectares of new urban area.

The Community Area land need calculation was shown in Table 26 of the LNA Report and is reproduced below from the document followed by a revised version. There is no change to the units or people to be accommodated in the Community Area. Rather it is proposed that a higher density be used for the new DGA in Caledon. Applying 67.5 residents and jobs per hectare would result in the 2,870 hectares of Community Area as now proposed. The adjustment does not change the anticipated density of the existing DGA in Peel at 2051 of 72 persons plus jobs per hectare, nor does it result in any significant change to the LNA. The increased amount of Employment Area of 130 hectares is addressed in the next section.

Table 1: Community Area Land Need (Balanced Approach)

Community Area Land Need	
Total Units Shortfall	50,000
Total Residents	175,000
Planned Total Jobs (8 People: 1 Job)	20,000
Total Residents plus Jobs	195,000
Planned Density (Caledon)	67.5
Community Area Land Need (ha)	2,870

Source: Hemson Consulting, 2022

E. CHANGES IN THE EMPLOYMENT AREA SUPPLY POTENTIAL

The LNA Employment Area calculation does not distinguish between the DBUA and the DGA, so these areas can be treated together. The changes to the Employment Area in the above sections are shown in the table below.

Changes to Employment Area

Change to the ROPA 30 “Option 6” lands from Community Area to Employment Area (rounded from 96 hectares)	100 ha
Changes to the proposed SABE Area	130 ha
Total Additional Employment Area	**230 ha**

The following is a revised supply table from the LNA, which add the 100 hectares to the existing supply of lands within the existing DGA Caledon.

Table 31 – Vacant Employment Area Lands by Local Municipality

Vacant Employment Area Land by Local Municipality				
	Vacant	Vacant Low Potential	Underutilized	Total
Brampton	730	130	140	1,000
Caledon	380	0	30	410
Mississauga	570	0	100	670
Peel	1,680	130	270	2,080

Source: Region of Peel, 2022

Given this supply in the base plus the additional lands added through the SABE, the total of existing supply plus new designation changes from 1,980 hectares in the updated 2022 LNA Report to 2,080 hectares with the "option 6" change. The total demand remains unchanged from the updated LNA in the calculations. The result is the provision of an additional 230 hectares of Employment Area lands, considered a contingency on the total supply.

In accordance with the LNA Methodology, such a contingency assures there is choice in location and size within the land supply and "other factors that reflect the changing needs of businesses." One of those factors concerning the changing needs of businesses is the employment density. The assumed employment density for new development is less the overall regional density but somewhat higher than most development in recent years in Caledon or Brampton. The contingency can compensate for the additional land required, should the employment land employment density not quite rise to the planned level. The contingency may also be used to compensate for encumbrances that may arise with other supply in the Region or to compensate for conversion of employment land that may occur, for example through the Region's proposed flexible policy approach for some MTSAs.

F. HOW PEEL'S FLEXIBLE POLICY APPROACH TO EMPLOYMENT AREA CONVERSIONS FITS WITHIN THE LNA AND EMPLOYMENT AREA CONTINGENCIES

Peel's proposed flexible policy approach to MTSAs that lie partly or entirely within Employment Areas. While these MTSAs have been identified as part this MCR work to have the potential to support a mix of uses, including residential, the need for or desirability of converting some of the Employment Area lands to Community Area lands requires further detailed technical study, not just from a land needs perspective, but also due to proximity of sensitive uses to existing industries and infrastructure. These are being strengthened by the Province both in new guidelines and in policy through the new Provincial Policy Statement. Because of the detailed planning work involved, the Region is proposing that further technical study in collaboration with the local municipalities be undertaken in a subsequent phase of this MCR to follow after for further consideration of employment conversions that have the potential to accommodate a mixed use development in Strategic Growth Areas and other areas with the potential to accommodate a mix of uses.

While Peel proposes to decide on the conversions at a later date, informed by technical studies, it does not want to reopen the LNA and the settlement area expansions. Rather the Region proposes to rely on the sufficiency of the planned land supply, including the contingency, to be able to accommodate the flexible MTSA-Employment policy or direction on employment conversions that may occur.

With no expectation as to what the local municipalities and the Region may conclude in a future phase of the Peel 2051 Official Plan and Municipal Comprehensive Review, the Region still wants to understand the sufficiency of the employment land supply. The question to be addressed, then, is, what is a reasonably and likely quantum of conversions that might occur and how much of such conversions would need to be "replaced" with new employment areas. In undertaking Employment Area conversion analyses, the notion of replacement is important. Employment land employment uses, existing or potential (on vacant lands), would generally be replaced in the overall supply through the LNA. That replacement can either be calculated as lands for some number of jobs or directly as the number of hectares converted.

Other land uses do not require replacement in the land supply. In particular, lands used primarily for retail and related services, such as food and accommodation, need not be replaced. Retail remains and often expands in mixed-use environments as they redevelop. In general, larger scale retail is not planned to be accommodated in new Employment Areas, as it may have been in the past, but is intended to be within the Community Area, mainly in the very mixed-use areas under consideration for parts of the MTSAs. The same logic can be applied to existing free-standing office buildings in Employment Areas, as they do not consume a significant amount of land area and typically quite welcome as part of mixed use areas. And, finally, the same would generally apply to larger institutional uses and infrastructure uses that are on lands that are converted. Infrastructure in this case are the GO Station parking areas; should the parking areas in an Employment Area, be converted and the land redeveloped in some way, the parking is likely to be replaced through the redevelopment.

In order to test what might occur under the flexible policy but mainly to determine if the employment land supply contingency is likely to be sufficient to allow for some conversions to occur in MTSAs, a possible scenario of MTSAs conversions is laid out in the table following. This is purely an example to test and is in no way a suggestion of how the local municipalities should proceed. For the most part in this example, the conversions are lands that are in developed retail and service commercial uses that would not need to be replaced in the land supply contingency as they are not Employment Land Employment Uses. The suitability of lands for conversion at all in many of these areas is, at best, uncertain due to nearby existing industries or in the case of Queen Street in Brampton, CN's Brampton Intermodal facility.

These MTSAs have almost 1,000 hectares of total land, of which about 650 developable hectares are in the Employment Area. Under the scenario about 220 hectares would be converted to allow for mixed-use development. Because most of these lands are already developed for retail and service commercial uses, they need not be replacement in the overall land supply intended for Employment Land

Employment. In this scenario the replaced lands would add up to nearly 80 hectares. This would represent just over one-third of the supply contingency, leaving most of the supply contingency for its initial purpose of choice in site size and location within the overall stock of Employment Area lands.

An Example Employment Area Conversion Scenario under Peel's Flexible Policy Approach Demonstrating How Some Conversions Could Be Accommodated within the Employment Area Land Supply Contingency

MTSA	Total Area (total ha)	Employment Area (total ha)	Employment Area (estimated dev. ha)	A Possible Conversion Scenario	Employment Area Converted (in dev. ha)	Employment Area Replaced in Regional Supply (in dev. ha)
Bramalea GO	113	109	109	Lands fronting Bramalea (except Canadian Tire Distribution, and westerly portion of East Dr. lands, all should be replaced in the total supply except the GO Station and Parking Area	38	31
Clarkson GO	82	30	30	Retail lands and GO parking on NW of Southdown and Royal Windsor, no replacement needed	12	0
Bolton GO	101	19	16	All Employment Area lands, at a rural density from earlier time, so replacement lands accommodates displaced jobs	16	4
Torbram	45	45	45	Retail lands on north side (not south side lands as office & parking are part of adjacent industrial development), no replacement of retail lands	4	0
Chrysler–Gateway	57	57	54	Retail and Banquet Hall lands on north and south side of Queen, no replacement of retail lands	26	0
Airport	90	90	88	Retail lands on the NE and SW corners of Airport & Queen, no replacement of retail lands	38	0
Goreway	123	104	102	North side Queen at Humbercrest (13.3 ha) plus Humbercrest lands (9.8 ha), all good vacant ELE land, so all must be replaced	23	23
McVean	27	12	11	All of the Employment Area, replace the primary vacant site	11	6
The Gore	104	54	52	Retail, place of worship, and recent office building lands, with only office building lands suggested for replacement	19	4
Highway 50	36	36	34	No conversion	0	0
Steeles–Mississauga	53	50	40	Lands on the northeast corner, plus, parcels on south side east of SWM pond, northeast lands replaced	16	14
Wharton Way	161	75	73	Remaining Employment Area lands on north and south side of Dundas at east end are primarily retail, no replacement needed	15	0
Total	**992**	**679**	**652**		**218**	**79**

G. LNA CONCLUSIONS ACCOUNTING FOR THE CHANGES SHOWN IN THE PLAN

The results of the matters outlined above has an impact on the LNA results. The example scenario of conversions under the flexible policy is not included as that was only to demonstrate one conceivable outcome of applying the flexible policy approach.

The overall outcome is consistent with the initial findings of the LNA Report from October 2021, as updated in the Spring of 2022. In each case, demonstrating the need for 4,400 hectares through a SABE for both Community Area and Employment Area uses. Changes addressed include the following:

- 100 hectares of Community Area land in the existing Designated Greenfield Area changed to Employment Area, resulting in a net addition to DGA Employment Area land and a net reduction in DGA Community Area land.
- 130 hectares of Community Area land in the SABE changed to Employment Area
- Results in 230 ha of employment land supply contingency to allow for a possible lower employment density of development, choice in location and site size and to accommodate some conversions of existing Employment Areas in select Major Transit Station Areas and other strategic areas identified through a future phase of the MCR.
- In the SABE Community Area, the reduced land area of 130 hectares results in a need to adopt a DGA density target for new areas of 67.5 persons plus jobs per hectare, a minor change from the 65 assumed in the LNA documents.

The outcomes of these adjustments result in a final LNA based on the following results:

Peel's Balanced Approach to Growth Management

Population Growth, 2021–2051	700,000 people
Employment Growth, 2021–2051	335,000 jobs
Housing Need, 2021–2051	271,000 housing units
Intensification Rate	Minimum of 55% of all new housing units to be built within the Delineated Built-Up Area (DBUA), Region-wide
Designated Greenfield Area density	Minimum 70 residents and jobs per hectare of Community Area DGA, Region-wide
Employment Area Density for the Regional Employment Area Density Target	Minimum of 41 jobs per developable hectare of Employment Area, Region-wide

Settlement Area Boundary Expansion

SABE Housing Need to 2051	195,000 residents and jobs
SABE Housing Need to 2051	50,000 housing units
SABE Employment Area Jobs	40,000 jobs
SABE Community Area Land Need	2,870 hectares
SABE DGA Employment Area Land Need	1,530 hectares
SABE Designated Greenfield Area density	Minimum 67.5 residents and jobs per hectare of Community Area DGA
SABE DGA Employment Area density	25.6 jobs per hectare
Employment Area Density Target Combining Existing Employment Area and SABE Lands	Minimum of 40 jobs per developable hectare, Region-wide

Region of Peel
2051 Land Needs Assessment Report

Spring 2022

EXECUTIVE SUMMARY

A fundamental component of the Municipal Comprehensive Review (MCR) is assessing the land needed to accommodate Provincial Growth Plan population and employment forecasts.

A Place to Grow Growth Plan for the Greater Golden Horseshoe (Growth Plan, 2019) requires upper- and single- tier municipalities to plan for the growth forecasted on Schedule 3 of the Growth Plan and undertake a Land Needs Assessment (LNA) utilizing the Provincial Methodology to determine the amount of land that will be required to accommodate the forecasted growth.

This report provides the supporting background information and the technical inputs required to meet the requirements of the Provincial Land Needs Assessment methodology. The Report covers the following key areas:

- Historical population, household, and employment growth in Peel over the past 30 years
- Future planning considerations that will shape growth in Peel over the next 30 years
- Community and Employment Area land needs to be guided by a balanced approach to addressing market demand and policy objectives
- A distribution of population and employment to the local municipalities to meet the Provincial forecasts in Schedule 3

The key findings and observations from the Report are as follows:

- The Region is exceeding its population forecasts and falling short of its employment forecasts compared to the in-effect Regional Official Plan;
- A minimum intensification rate of 55% is recommended to support a range and mix of housing types and support transit investments;
- Peel is currently exceeding the minimum designated greenfield area target of 50 people and jobs per hectare prescribed in the Growth Plan, 2019 and is well positioned to establishes a minimum density above the provincial target;
- The results of the land need assessment for the Region of Peel is based on a balanced approach to providing a range and mix of housing units and employment types to meet the needs of Peel households;
- A land need of approximately 4,400 net developable hectares (3,000ha Community Area and 1,400 ha Employment Area) is required to accommodate forecasted population and employment growth to the planning horizon;
- 59 employment conversion requests have been received to-date. Staff continue to evaluate conversion requests and will update the employment land need based on the final recommendations.

TABLE OF CONTENTS

Contents

LIST OF TABLES AND FIGURES

APPENDIX

Appendix I: Summary of ROPA Historical Forecasts

Appendix II: Household Growth by Dwelling Type 1991-2021

Appendix III: Employment Growth by Employment Type 1991-2021

Appendix IV: Peel Growth Management Scenarios

Appendix V: Climate Change Criteria to Evaluate Regional Growth Allocation Intensification Targets, Greenfield Density Targets and Settlement Area Boundary Expansions (SABE)

Appendix VI: Policy Areas and LNA Geographies

Appendix VII: DGA Takeout Methodology

Appendix VIII: Intensification Analysis 2051 Addendum

Appendix IX: Strategic Growth Areas

Appendix X: Peel Region Employment Strategy Discussion Paper and 2051 Addendum

Appendix XI: Vacant and Underutilized Land Inventory

Appendix XII: 2051 Municipal Growth Allocation of Population and Employment

Appendix XIII: 2051 Land Budget Tables

Appendix XIV – Employment Conversion Analysis, January 2022

INTRODUCTION

The Peel 2051 Regional Official Plan Review (Peel 2051) is a Municipal Comprehensive Review (MCR) that will amend the official plan to manage growth and implement provincial policy directions. As part of Peel 2051, the Regional Growth Management Strategy fully integrates and coordinates land use planning, infrastructure planning and infrastructure financing and investment.

To support this integrated approach to planning, the Region of Peel has completed a Land Needs Assessment (LNA) report to determine the amount of land required to accommodate future population and employment growth to the year 2051 in accordance with the requirements of the Growth Plan for the Greater Golden Horseshoe, 2019 and the Provincial Land Needs Assessment Methodology, 2020.

The LNA informs elements of the Peel 2051 MCR including:

- The amount of population and employment growth allocated to the local municipalities;
- The planned mix of housing units and employment types;
- Minimum rates of intensification;
- Minimum densities in designated greenfield areas and Strategic Growth Areas; and
- The need for settlement area boundary expansion.

This report provides an overview of Peel's past growth, and completes the components required by the Provincial Land Needs Assessment Methodology to assess the amount of land required to accommodate future growth.

This report also serves as an update to all previously published documents and Council reports on the LNA.

What is a land needs assessment?

A Land Needs Assessment (LNA) is a standard methodology issued by the Province that must be completed as a part of a MCR to determine the amount of land needed to accommodate forecasted growth to the 2051 Planning horizon.

On August 28, 2020, the Minister of Municipal Affairs announced approval of an updated Land Needs Assessment Methodology that introduced new elements such as a simplified stepped process, flexibility to plan beyond Provincial forecasts, and requirements to address market demand in the land supply analysis.

COMMUNITY AREA

- R1 POPULATION FORECASTS
- R2 HOUSING NEED
- R3 ALLOCATION OF HOUSING NEED
- R4 HOUSING SUPPLY POTENTIAL BY POLICY AREA
- R5 COMMUNITY AREA JOBS
- R6 NEED FOR ADDITIONAL LAND

EMPLOYMENT AREA

- E1 EMPLOYMENT FORECASTS
- E2 EMPLOYMENT ALLOCATION
- E3 EXISTING EMPLOYMENT AREA POTENTIAL
- E4 NEED FOR ADDITIONAL LAND

The outcome of the LNA is to ensure that sufficient land is available within municipalities to meet forecasted growth in Schedule 3 of the Growth Plan, 2019. This includes accommodate all housing market segments and employment types to the horizon of the plan, while avoiding shortages that may increase the costs of housing and have the effect of not meeting employment targets.

Data Sources

The base year utilized for the LNA is 2021 (estimated). These estimates are derived from the 2016 Census and extrapolated to 2021 based on Region of Peel building permit data, Canadian Mortgage and Housing Corporation, Statistics Canada data-sets, local municipal employment surveys. Interim year forecasts and analysis are provided by Hemson Consulting for the Region of Peel.

Forecasts for the 2051 Planning Horizon are in accordance with Schedule 3 of the Growth Plan for the Greater Golden Horseshoe.

POLICY CONTEXT

Peel Region is growing. Where and how the Region grows will have an impact on all aspects of daily life for residents, including where people live and work, how they travel, how they spend their leisure time and how the natural environment is protected for current and future generations.

The Provincial, Regional (upper-tier) and local municipal (lower-tier) governments all have a role to play in planning for growth (see Fig. 1). The Province of Ontario is responsible for establishing a Provincial planning framework through the *Planning Act, 1990*, the *Provincial Policy Statement, 2020*, and A Place to Grow: Growth Plan for the Greater Golden Horseshoe Amendment 1, (Growth Plan, 2019), among other policy documents and legislation.

Figure 1: Provincial, Regional and Local roles in growth planning

Provincial Policy Statement (PPS)

The PPS is a consolidated statement of the government's policies on land use planning for matters of Provincial interests such as: efficient land management, affordable housing, environmental protection and economic development. It is issued under Section 3 of the *Planning Act*. All planning related decisions are required to conform with the PPS, 2020. The new PPS came into effect on May 1, 2020. The PPS is the primary provincial land use planning policy document in Ontario to guide decision-making.

The Provincial Policy Statement provides direction on matters related to growth, including the achievement of cost-effective development, and minimizing land consumption and servicing costs by supporting the integration of land use planning, growth management, transit supportive development, and intensification. The PPS also directs municipalities to provide an appropriate range and mix of housing options and densities required to meet projected requirements of current and future residents.

A Place to Grow: Growth Plan for the Greater Golden Horseshoe

The Growth Plan is a consolidated statement of the government's policies to plan for growth and development in a way that supports economic prosperity, protects the environment, and helps communities achieve a high quality of life. The Growth Plan guides where and how development will occur through policies and minimum intensification and density targets focused on optimizing existing urban land, infrastructure, and public service facilities.

The policies of the Growth Plan are intended to support:

- The achievement of complete communities
- Prioritize intensification and higher densities to make efficient use of land
- Promoting an integrate transportation network
- Providing housing options to meet the needs of people at any age
- Curbing sprawl and protecting farmland and natural heritage feature areas, and
- Promoting long-term economic growth

The population and employment forecasts for upper- and single- tier municipalities on Schedule 3 in the Growth Plan, 2019 form the basis for planning and managing growth within the planning horizon. The Region of Peel is forecasted to accommodate an additional 700,000 people and 335,000 jobs between 2021 and 2051. Based on the provincial forecasts, the Region of Peel will accommodate a sizable portion of the growth in the Greater Toronto and Hamilton Area in the coming decades.

Table 1: Population and Employment Allocation to Greater Toronto and Hamilton Area (GTHA)Municipalities

Growth Plan – Population and Employment Forecast by Greater Toronto and Hamilton Areas Municipalities 2021-2051						
	Population			Employment		
	2021	2051	2021-2051	2021	2051	2021-2051
Toronto	3,034,000	3,650,000	617,000	1,697,000	1,980,000	282,000
Peel	1,578,000	2,280,000	700,000	736,000	1,070,000	335,000
York	1,211,000	2,020,000	810,000	580,000	990,000	414,000
Durham	722,000	1,300,000	574,000	239,000	460,000	225,000
Halton	618,000	1,100,000	485,000	278,000	500,000	220,000
Hamilton	584,000	820,000	239,000	238,000	360,000	119,000
GTAH Total	7,747,000	11,170,000	3,425,000	3,765,000	5,360,000	1,595,000
GGH Total	10,246,000	14,870,000	4,581,000	4,794,000	7,010,000	2,214,000

Source: Hemson Consulting, 2020 (prepared for the Municipal Affairs and Housing), Schedule 3 – Growth Plan for the Greater Golden Horseshoe

As a part of the conformity exercise with the Growth Plan, 2019 upper- and single- tier municipalities must demonstrate how they will accommodate the forecasted growth, this includes allocating population and employment to the lower-tier municipalities, confirming that sufficient land is available, and conforming to the policy objectives and targets of the Plan.

Regional Official Plan (OP) Review (Peel 2051)

The Regional Official Plan is being comprehensively updated through Peel 2051 Regional Official Plan Review (also known as a municipal comprehensive review or MCR), to be finalized by 2022. This update will incorporate all changes required to bring the Regional Official Plan into conformity with the Growth Plan, 2019, including the population and employment forecasts. It will also update policies in the following areas (Figure 2):

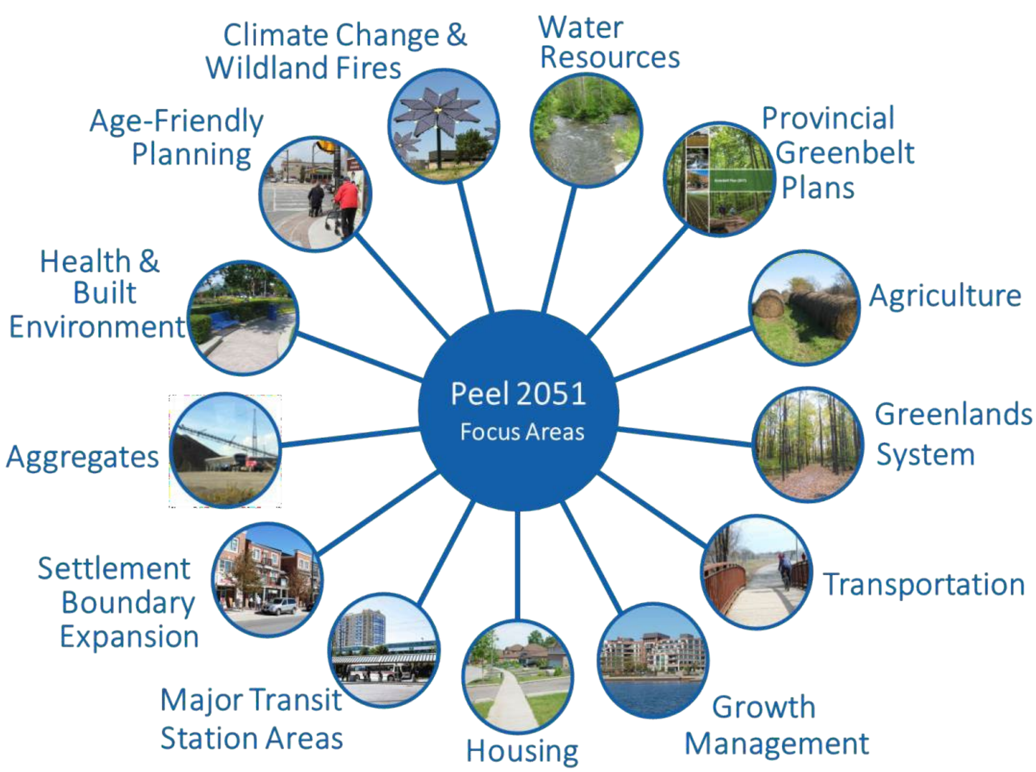

Figure 2: Peel 2051: Regional Official Plan Review Focus Areas

The Region works closely with the local municipalities to plan for growth in a way that reflects local needs. At the local level, municipalities implement the Provincial and Regional growth forecasts, and develop their own supporting policies in local official plans. Working together, all levels of government support the development of "complete communities" – the idea that people can work, learn, shop, be active, and age close to home.

HISTORY OF GROWTH PLANNING IN PEEL

The Regional Municipality of Peel was created in 1974. Between 1974 and 1996, Peel’s population grew by more than 500,000 people and 250,000 jobs. Peel’s growth in the first 20 years of the Region introduced the need for a more comprehensive approach to planning. In 1996, Regional Council adopted its first Official Plan. The Region’s first Official Plan established the urban boundary and introduced growth forecasts to the year 2021.

In 2002, the Region undertook the Regional Official Plan Strategic Update, which included an update to the population and employment forecasts to 2021 through Regional Official Plan Amendment (ROPA) 8. ROPA 8 increased forecasted population and employment growth in Mississauga while decreasing forecasted growth in Brampton. In 2006, the Region expanded the urban boundary of Peel to incorporate lands in Northwest Brampton and extended the planning horizon to accommodate growth to the year 2031 through ROPA 15.

The Growth Plan for the Greater Golden Horseshoe, 2006 (Growth Plan, 2006) was the first growth plan, which provided growth forecasts for upper- and single-tier municipalities to the year 2031 and introduced density and intensification targets. The Region implemented these forecasts and policy requirements through ROPA 24.

In recent years, additional settlement area boundary expansions have been approved or settled at the Ontario Land Tribunal (formerly the Land use Planning Act Tribunal:

- Mayfield West Phase 2 Stage 2 (ROPA 34)
- Ninth Line (ROPA 33)
- Bolton (ROPA 30)

The settlement area boundary expansions have increased the land supply and positioned the local municipalities in Peel to respond to the rapid rate of forecasted growth. Appendix I summarizes the historic growth forecasts in Peel.

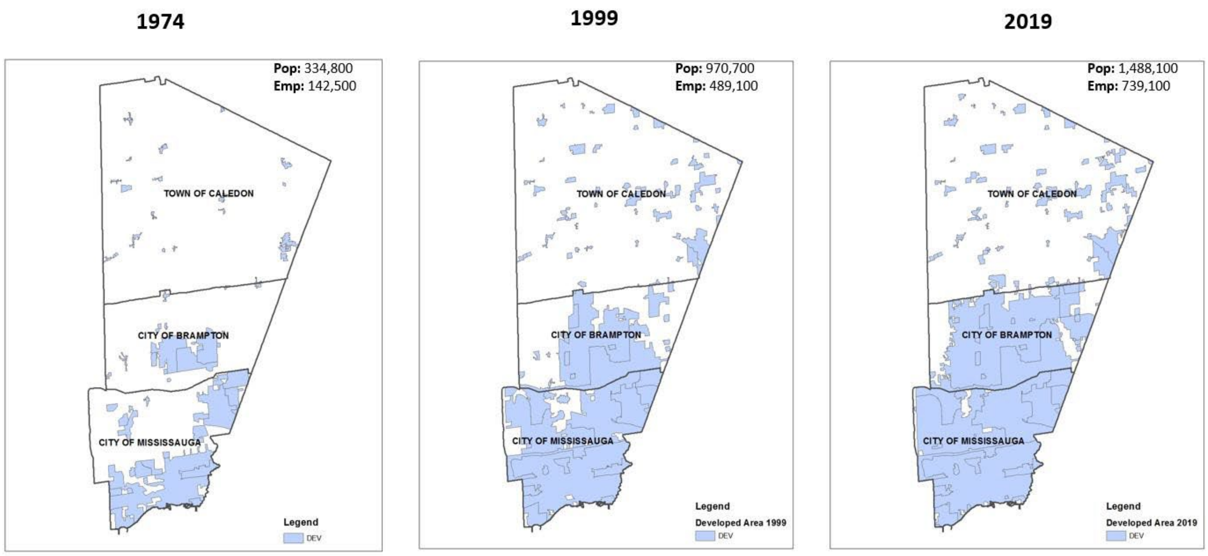

Figure 3: Historical Development Patterns
Source: Peel Data Centre, 2021

Population

The Region of Peel has experienced rapid population growth over the last 30 years, growing by 820,000 people. The Region has consistently exceeded Regional and Provincial population forecasts. Population growth in Peel has been driven by Mississauga and Brampton. Between 1991- 2021 the City of Brampton grew by 450,000 people (188%) and the City of Mississauga increased by 320,000 people (67%).

The pace of growth and historical development patterns may be attributed to the availability of greenfield lands and a preference for lower density housing types. In the last 10 years, growth in Mississauga has slowed, but a greater proportion of the new units being built are in apartment built-forms, while growth in Caledon driven by lower density built forms has increased.

Table 2: Historic Population Growth by Local Municipality 1991-2021

Historic Population Growth by Local Municipality 1991-2021				
Year	Peel	Brampton	Caledon	Mississauga
1991	758,474	242,660	36,190	479,624
1996	878,827	276,527	41,124	561,176
2001	1,032,000	339,591	52,802	639,608
2006	1,208,726	452,573	59,535	696,618
2011	1,350,097	545,478	61,900	742,719
2016	1,433,100	615,700	69,000	748,000
2021 (est)	1,578,000	703,000	80,000	795,000
2021 – ROP Forecast	1,490,000	635,000	87,000	768,000

Source: Statistics Canada Census 1991-2016, Region of Peel Official Plan (2021 forecast), Hemson Consulting (2021 estimate). Note, all figures include an undercount

Households and Housing Mix

The Region added 225,000 additional units in the last 30 years. While population growth is exceeding the forecasts, the total households in the Region is below forecasted levels. This indicates that more people are being accommodated in less units, which may be a result of larger household sizes or alternative living arrangements that are not being captured through traditional reporting measures.

Table 3: Historic Household Growth in Peel 1991-2021

Historic Household Growth in Peel 1991- 2021				
Year	Peel	Brampton	Caledon	Mississauga
1991	229,665	70,680	10,745	148,240
1996	265,930	81,075	12,550	172,305
2001	308,845	97,550	16,110	195,185
2006	359,042	125,934	18,214	214,894
2011	402,900	149,271	19,100	234,600
2016	430,100	168,100	21,200	240,100
2021 (est)	457,350	186,000	24,000	247,000
2021 – ROP Forecast	465,000	184,000	28,000	253,000

Source: Statistics Canada Census 1991-2016, Region of Peel Official Plan (2021 forecast), Hemson Consulting (2021 est).

Over the past 30 years there has been a preference for single- and semi- detached units in Peel. Approximately 55% of the new units over the 30-year period has been in low density housing forms. This trend is consistent across all three municipalities in Peel. Although it should be noted that the City of Mississauga has had a more balanced mixed of units, which may be attributed to land supply constraints. Appendix II provides a detailed breakdown of households by dwelling type in Peel.

Table 4: Households by Dwelling Type (%) in Peel 1991-2021

Households by Dwelling Type in Peel 1991-2021				
Year	Brampton	Caledon	Mississauga	Peel
Single/Semi	81,600 (68%)	10,700 (80%)	47,000 (50%)	139,300 (66%)
Row	16,500 (13%)	2,300 (17%)	18,400 (20%)	37,200 (18%)
Apartment	6,500 (19%)	400(3%)	28,900 (31%)	35,800 (17%)
Total	104,600 (100%)	13,300 (100%)	94,300 (100%)	212,200 (100%)

Source: Canada Mortgage and Housing Corporation (CMHC) Starts and Completions Survey, May 1991 to April 2021.
Note: CMHC data is new construction and does not count units added within existing buildings. From 1991 to 2021 there were approximately 11,000 additional accessory units added within the existing housing stock.

Employment

Between 1991 and 2021 the Region of Peel added approximately 360,000 jobs, much of this growth occurred in the early 1990's, as employment growth in Peel has been slower than anticipated due to several factors such as the 2008 Recession, the changing nature of employment as sectors such as warehousing and logistics are impacted by technological advancements such as automation, and the on-going COVID-19 pandemic

It is anticipated that the Region may fall short of its 2021 Regional Official Plan forecast by approximately 10%. All three of the local municipalities in Peel are not achieving their employment forecasts, however the greatest shortfall is within the City of Brampton, at approximately 25% below the in-effect employment forecast. It should be noted that the 2021 estimates will have to be validated against the 2021 Census and local employment surveys. Many industries have been hard hit by the Pandemic such as the airline industry, and some jobs loss in 2020-2021 may return or transition to different forms of employment in the future.

Table 5: Historic Employment Growth in Peel 1991-2021

Historic Employment Growth in Peel 1991-2021				
Year	Brampton	Caledon	Mississauga	Peel
1991	92,600	11,500	274,100	378,200
1996	103,800	14,500	302,600	420,900
2001	133,600	18,400	382,200	534,200
2006	155,900	21,400	430,700	608,000
2011	172,400	22,700	455,400	650,500
2016	191,400	27,200	476,800	695,400
2021 (est)	210,500	31,800	493,300	735,600
2021 – ROP Forecast	280,000	40,000	500,000	820,000

Source: Statistics Canada Census 1991-2016, Region of Peel Official Plan (2021 forecast), Hemson Consulting (2021 est).

The type of employment accommodated across Peel over the past 30 years is employment land employment jobs which traditionally accommodates warehousing, manufacturing, and logistics. Employment Land Employment jobs (ELE) represented 50% of the new job growth in Peel between 1991 and 2021. These jobs have located in Peel due to its strategic locational advantages such as 400 series highways, goods movement corridors, and the Pearson International Airport. Appendix III provides a detailed breakdown of the historical mix of dwelling units in the Region.

Table 6: Employment Growth by Employment Type (%) in Peel 1991-2021

Employment Growth by Employment Type and Local Municipality 1991-2021				
	Brampton	Caledon	Mississauga	Peel
Major Office	12,000 (10%)	200 (1%)	66,400 (30%)	78,700 (22%)
Employment Land Employment	54,600 (46%)	14,800 (73%)	102,600 (47%)	172,000 (48%)
Population Related Employment	41,800 (35%)	1,800 (9%)	37,100 (17%)	80,700 (23%)
Home based employment	9,400 (8%)	1,900 (9%)	13,100 (6%)	24,400 (7%)
Rural employment	-	1,600 (8%)	-	1,600 (<1%)
Total	117,900 (100%)	20,430 (100%)	219,300 (100%)	357,400 (100%)

Source: Statistics Canada Census 1991-2016, Region of Peel Official Plan (2021 forecast), Hemson Consulting (2021 est).

EVALUATING OPTIONS AND IMPLICATIONS OF GROWTH

To align planning with the new forecasts, the Region, working with the local municipalities, internal and external stakeholders, and the development industry, developed a series of growth allocation scenarios that explored options for accommodating forecasted growth throughout Peel. These scenarios considered factors including infrastructure and servicing, transportation planning, development financing, preservation of agricultural lands, employment planning, and a range of density and intensification rates (see Appendix IV for the list of Peel's Growth Management scenarios).

The evaluation of scenarios takes into consideration the changing provincial context that guides how growth is managed in the Region. Throughout 2018 and 2020, the Provincial planning framework underwent many changes with significant implications for growth planning in the Region. Most notably in August 2020, A Place to Grow: Growth Plan for the Greater Golden Horseshoe was updated with a new planning horizon to 2051, new population and employment forecasts, and the introduction of a new Land Needs Assessment methodology.

Table 7:Changing Provincial Requirements

	Region of Peel Official Plan	Growth Plan, 2017	Growth Plan, 2019 (2020 Office Consolidation)
Intensification target	40% intensification to 2025 50% intensification post-2025	50% intensification from MCR to 2031 60% intensification post-2031	50% intensification post-MCR
Designated Greenfield Area Density target	50 residents and jobs per hectare measured across Community	80 residents and jobs per hectare measured across Community Areas	50 residents and jobs per hectare measured across Community Areas

	and Employment Areas		
Policy Areas	Urban Growth Centres Delineated Built-up Area Designated Greenfield Area	Urban Growth Centres Delineated Built-up Area Designated Greenfield Areas Employment Areas Strategic Growth Areas Major Transit Station Areas	Urban Growth Centres Delineated Built-up Area Designated Greenfield Areas Employment Area Strategic Growth Areas Major Transit Station Areas
Planning Horizon	2031	2041	2051
Population and Employment Forecasts	1,640,000 People 870,000 Jobs	1,970,000 People 970,000 Jobs	2,280,000 People 1,070,000 Jobs

Growth Management Strategy

In Peel's case, the Provincially mandated methodology has been supplemented by the extensive work undertaken through the Growth Management Strategy (GMS) to evaluate options for accommodating growth in existing urban areas and through boundary expansion. The principles identified of the GMS to support complete and healthy communities include:

- efficiently using existing and planned Regional infrastructure
- supporting growth pays for growth to minimize financial impacts to existing residents and businesses
- protecting environmental and agricultural resources
- creating densities that support transit, affordable housing and complete communities
- planning for a range of employment over the long-term to adjust to market cycles.

The principles are applied in the forecast and allocation work collaboratively in an integrated manner to address factors including infrastructure and servicing, transportation planning, development financing, preservation of agricultural lands, employment planning, and a range of density and intensification rates. The distribution of population, household, and employment growth within the municipalities of Peel is based on a small geographic unit (SGU) geography forecast prepared by Hemson Consulting that reflects the community and policy areas of the Region. This work has positioned the Region to respond to shifting provincial planning frameworks and new planning assumption and development trends in a manner that balances the requirements of Provincial plans, current market trends, infrastructure and financial planning, and local planning priorities. Moving forward it will be an important part of the on-going monitoring of growth in an integrative manner to support the GMS principles.

Fiscal Impact Scenario

Staff have assessed the fiscal impacts of accommodating new growth to 2051. Several scenarios were evaluated to determine the high-level costs associated with accommodating Settlement Area Boundary Expansion (SABE) under a range of density and intensification assumptions.

Table 8: Fiscal Impact Assessment Scenarios Summary

Fiscal Impact Assessment Summary				
	Minimum Intensification Rate	Minimum Designated Greenfield Area Density (Residents and jobs per hectare)	Community Area Land Need	Employment Area Land Need
LNA Base Scenario (Dec 2020)	55%	65	3,000	1,200
New LNA Base	55%	65	3,000	1,400
High DGA Density	55%	75	2,500	1,400
Low DGA Density	55%	55	3,200	1,400
Minimum Intensification	50%	65	4,200	1,600
No GTA West	55%	65	3,000	1,400

Source: Hemson Consulting, 2021

The detailed findings from the Fiscal Impact Analysis are included in the SABE Planning Justification Report titled: "Hemson Planning Justification Report Part 2: Final Concept Map and Fiscal Impact Analysis – January 2022".

GTA West Corridor

The GTA West corridor has been considered through the SABE Report to assess how Council's position on the corridor may impact the location of new population and employment growth. For the purpose of the LNA, this position does not impact the land requirements or municipal allocation of population and employment growth in accordance with the Growth Plan, 2019.

Climate Change

A climate change lens has also been developed to support the evaluation of scenarios and assist with the Growth Management and Settlement Area Boundary Expansion (SABE) Focus Areas.

Climate Change is one of thirteen focus areas being addressed through the Region's Peel 2051 Official Plan review process. As part of the Climate Change Focus Area, the Region has drafted new policies as part of an integrated systems-based approach that embeds climate change policy direction throughout key theme areas in the Regional Official Plan.

Appendix V – "Climate Change Criteria to Evaluate Regional Growth Allocation, Intensification Targets, Greenfield Density Targets and Settlement Area Boundary Expansions (SABE)" is supplementary to the overall policy framework and direction for climate change planning and supports the integration of climate change considerations specific to the Peel 2051 Growth Management and SABE planning work.

The criteria identify key climate change considerations that assist in understanding how climate change outcomes/objectives can be supported in growth management and settlement expansion policy development and implementation. Specific to the Growth Management Focus Area, the criteria align climate change outcomes to key policy requirements in the Provincial Policy Statement (2020) and Growth Plan (2019). Directions are provided that climate changes objectives can be supported through the allocation of population and employment growth, setting minimum density and intensification targets above Provincial minimums, shifting to more higher density units, and directing growth to strategic growth areas served by transit.

These directions support better use of transit, active transportation (walking, cycling), reduced vehicle trips and a broader range of housing choices that shift building types from low density to medium and higher density housing options, which provide opportunities to maintain, restore, and enhance the diversity and connectivity of natural features such as forests and rivers for the long-term protection of ecosystems and public health that assist in reducing greenhouse gas emissions. The shift in densities, intensification, and unit mix supports the Region of Peel’s approach to integrating policy direction for climate change mitigation and adaptation as part of the overall Peel 2051 Official Plan Review as well as alignment with the integration climate change considerations specific to the Growth Management Focus Area component of the Review.

The development of supporting policies in the Regional Official Plan from the LNA will emphasize locating growth in existing built-up areas, and more compact greenfield development.

Policy Areas in Peel

The LNA defines several policy areas and geographies to be utilized in determining the need for land to accommodate forecasted growth and achieving minimum density and intensification targets. For reference, Appendix VI provides mapping of the existing policy areas and LNA geographies inPeel.

Delineated Built-up area

All lands within the limits of the developed urban area as defined by the Minister, utilized for thepurpose of measuring the minimum intensification targets.

Designated Greenfield Areas

Lands within settlement areas but outside of the delineated built-up areas that are designated inan official plan for development to accommodate forecasted growth. These lands are used to measure the minimum designated greenfield area density targets.

Rural Areas

For the purposes of this analysis, Rural Areas in Peel are inclusive of Agricultural and Rural Areas, Palgrave Residential Community, Settlement Areas in the Rural System, and the Greenbelt.

The geographies of the LNA are comprised of community areas and employment areas, which are utilized to determine land needs.

Community Area

Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land employment jobs. Community areas include delineated built-up areas and designated greenfieldareas.

Employment Area

Areas where most of the employment land employment jobs are (i.e. employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the employment area. Employment Areas may be located in both delineated built-up areas and designated greenfield areas.

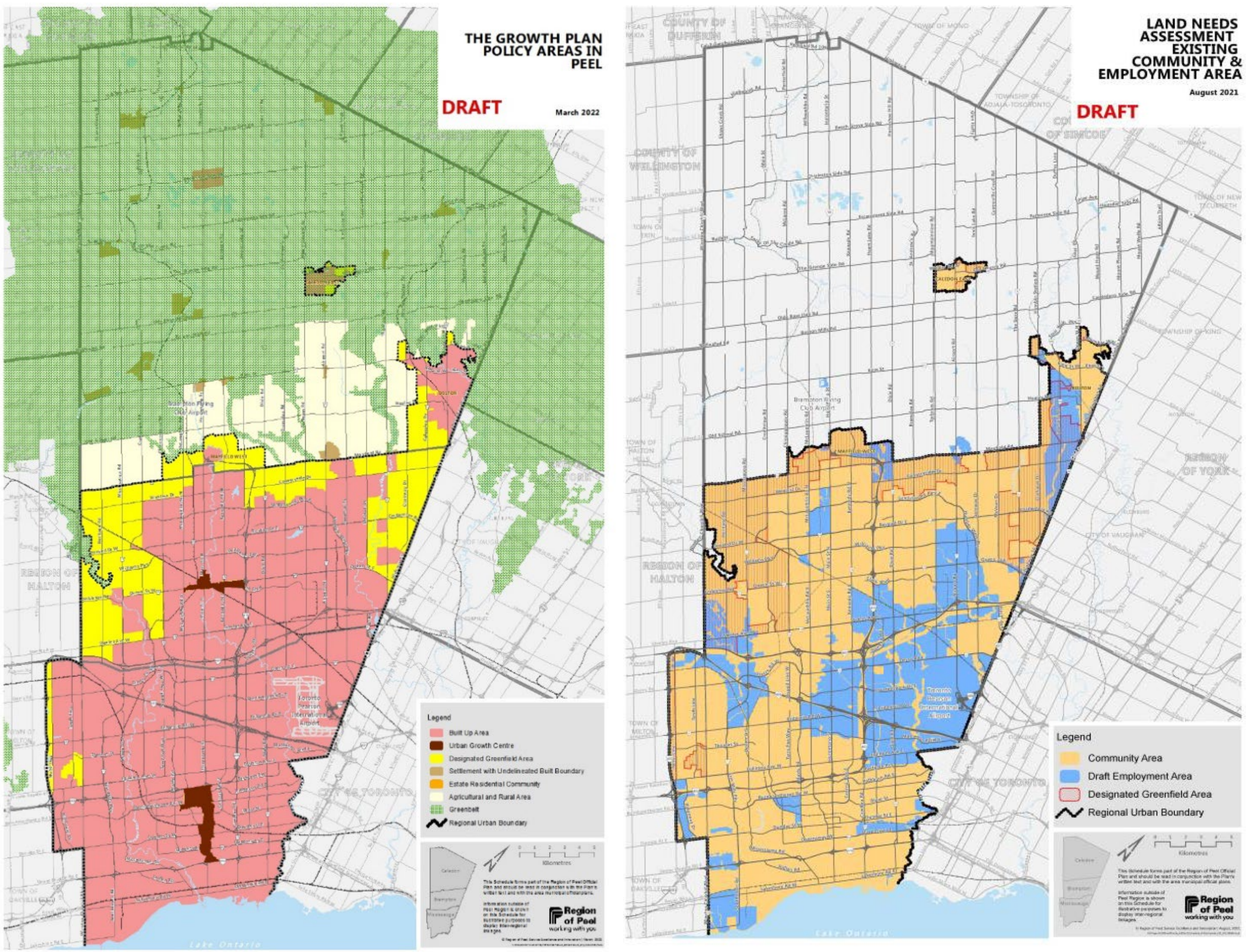

Figure 4: Existing Policy Areas and LNA Geographies

PLANNING FOR THE FUTURE

Patterns of growth and development trends that have and will continue to shape growth in Peel over the next 30 years.

Land supply

The Region of Peel is approaching build-out of its remaining designated greenfield area (DGA) lands. To accommodate growth within the existing settlement areas will require the build-out of the remaining DGA lands in the City of Mississauga and the City of Brampton. Typically designated greenfield areas has accommodated much of the lower density type of dwelling units such as single- and semi- detached units. As Peel looks towards the 2051 Planning Horizon the communities of Brampton and Mississauga will not have the supply of land available in previous decades to accommodate low density units.

The Town of Caledon has a more unique context as they have a limited supply of DGA lands currently available. However, they have rural and agricultural lands available in the 'whitebelt' that could accommodate more growth through Settlement Area Boundary Expansion (SABE). In the past much of the available land supply has been within Brampton and Mississauga, but as we move to 2051, it is anticipated that Caledon will have the largest supply of vacant land to accommodate future growth.

The shift in housing mix

Historically the type of units accommodated in the Region has been single- and semi- detached units. A driver for this preference has been a market demand for low density units and the available supply of land within all three municipalities for these units to be accommodated.

As we've noted both Brampton and Mississauga will built-out their supply of DGA lands within the Planning Horizon. As a result of this, these communities which represent 95% of the total population in Peel (as of 2021) have started to shift their policy frameworks to provide a greater mix of built forms to preserve their existing land supply and accommodate more people in compact, transit supportive patterns of growth. This shift has started many years ago with Brampton's 2040 Vision and the land use planning work in Mississauga to support future transit infrastructure.

The shift will occur in both the Delineated Built-up Area with an increase in higher density units in Strategic Growth Areas and in SGA with a greater mix of units such as row houses and apartments to support complete communities. Recent examples of such communities include Ninth Line, Heritage Heights, and Mayfield West Stage 2 Phase 2 which are designated greenfield areas being planned with transit-supportive densities and a mix of unit types.

The Changing Nature of Employment

The broader Greater Toronto and Hamilton Area (GTHA) market is experiencing a shift in job growth by employment sector as how people choose to work, and the location of job opportunities evolves. A greater proportion of jobs in Peel will be captured in the service-knowledge based sectors and the demand for industrial space to accommodate warehousing will continue in areas with locational advantages to transportation infrastructure. With an increased focus on service-knowledge based sectors to accommodate jobs in Peel, there will be a need to direct these uses to areas that can support sustainable modes of transit with amenities to attract and retain businesses in the service-knowledge-based sectors.

Transit/transportation

As the Region becomes more urbanized, investment in higher order and rapid transit will be critical to accommodate transit-oriented built forms that support key intensification objectives throughout the Region. The delivery of the Hurontario Light Rail Transit and Regional Express Rail service along transit routes such as the Lakeshore West Go Line, Kitchener Go Line, and Milton Go Line will support Priority Transit Corridors and other transit line of strategic importance to the Region.

Protecting what is important

The Region's environmental policies will continue to support the protection of natural resources and asset. The Greenland's system and Agricultural and rural lands in the Region protect valuable water resources and ecosystems and support the rural character and economy.

New communities

Across the Region new communities will be established in Strategic Growth Areas and newly designated greenfield areas. These communities will be denser than development of the past and will emphasize complete and healthy communities. These new communities will support the development of healthy and age-friendly communities in Peel.

Climate change

The Growth Management work supports the achievement of key climate change outcomes for mitigation and adaptation through the development of complete, compact communities by aligning with climate change outcomes and policy requirements in the Provincial Policy Statement (2020) and Growth Plan (2019). The allocation of population and employment growth, setting minimum density and intensification targets above Provincial minimums, and directing growth to strategic growth areas served by transit support the efficient use of land and reducing greenhouse gas emissions.

COMMUNITY AREA

Community Areas are lands within the Region that are designated to accommodate most of the forecasted population and household growth as well as a range of population related and major office employment growth. Community Areas are located within the following policy areas: Designated Greenfield Areas, Delineated Built-up Areas, and Rural Areas.

R1: Population Growth

The population forecasts in Schedule 3 of the Growth Plan, 2019 forms the basis for growth that must be planned for in the Region of Peel to the 2051 Planning horizon.

Table 9: Growth Plan Population Forecast to Greater Toronto and Hamilton Area 2021-2051

Growth Plan – Population Allocation to Greater Toronto and Hamilton Area 2021-2051			
	2021	2051	2021-2051
Toronto	3,034,000	3,651,000	617,000
Peel	1,578,000	2,280,000	702,000
York	1,211,000	2,021,000	810,000
Durham	722,000	1,296,000	574,000
Halton	618,000	1,103,000	485,000
Hamilton	584,000	823,000	239,000
GTAH Total	7,747,000	11,172,000	3,425,000
GGH Total	10,246,000	14,827,000	4,581,000

Source: Hemson Consulting, 2020 (prepared for the Municipal Affairs and Housing), Schedule 3 – Growth Plan for the Greater Golden Horseshoe

The Provincial forecast anticipates that Peel Region will accommodate 2,280,000 people by 2051, which is an increase of approximately 700,000 between 2021 and 2051. The population growth forecasted for Peel over the next 30 years less than the total amount of population growth experiences in the Region during the previous 30-year period.

Table 10: Historic and Forecasted Population Growth 1991-2051

Region of Peel - Historic and Forecasted Population Growth 1991-2051							
	1991	2001	2011	2021	2031	2041	2051
Population	755,400	1,032,100	1,340,500	1,578,000	1,829,000	2,050,000	2,280,000
1991-2021	822,600						
2021-2051				700,000			

Source: Source: Statistics Canada Census 1991-2011, Region of Peel Official Plan (2021 forecast), Hemson Consulting(2021 est).

The Growth Outlook for the Greater Golden Horseshoe prepared by Hemson Consulting notes that the population growth in Peel will be fueled by out-migration from Toronto as well as immigrant which has been steadily rising over the past 20 years. Hemson Consulting, Growth Outlook, 2020

Within Peel, the composition of the population is forecasted to continue to age, which is in line with trends across Ontario. The age cohorts with the most forecasted population growth will be core working age. Historically these cohorts have been mid to late career professionals with families or considering starting a family, which has an impact on housing preference. Between 2021 and 2051, proportionally the fully retired age cohorts will see the largest % increase.

Table 11: Population Age Cohorts (%) Distribution 2021-2051

Population Age Cohorts (%) 2021 – 2051		
	2021	2051
School Age (0-19)	22.8%	22.1%
Mixed Post-Sec & Work (20-29)	16.1%	12.3%
Core Working Age (30-59)	41.2%	40.5%
Gradually Retiring (60-69)	10.4%	10.0%
Fully Retired 70+	9.5%	15.1%

Source: Hemson Consulting, 2021

The composition of the forecasted population growth is an important input into the Land Needs Assessment to determine future steps on the total household required to accommodate the new population and the type of housing that will be needed.

R2: Housing Need

The assessment of Housing Need to accommodate forecasted growth is based on the age cohort forecast in Step R1 and consideration for the total units required to accommodate the forecasted population growth and the type of units (single- and semi- detached, townhomes, and apartments) that are commonly occupied by people in each age cohort.

To accommodate the additional 700,000 people forecasted for Peel, approximately 270,000 new dwelling units will be required to support the forecasted growth. An approximate household size of 2.60 people per unit (PPU) will be the basis for the growth required to accommodate new units There will be a small decline in the PPU for the existing 2021 units as the population ages. The shift in PPU will also result in an overall decrease in the average household size in the Region between 2021 and 2051. The decrease in average PPU will be more pronounced in Brampton and Mississauga, where more higher density units are anticipated over the next 30 years.

Table 12: Persons Per Unit by Housing Type in Peel 2021-2051

Persons Per Unit by Housing Type in Peel 2021-2051					
Year	Municipality	Housing Type			Total of All Types
		Singles and Semis	Rows	Apts	
2021	Brampton	3.98	3.29	2.72	3.61
	Caledon	3.27	2.90	2.04	3.17
	Mississauga	3.55	3.25	2.37	3.05
	Peel	3.70	3.23	2.55	3.29
2051	Brampton	3.68	3.06	2.63	3.26
	Caledon	3.34	2.97	1.94	3.16
	Mississauga	3.29	3.02	2.29	2.74
	Peel	3.47	3.02	2.39	3.00

Source: Hemson Consulting, 2021

The LNA requires the consideration of market demand to determine the type of dwelling units that will be required. The market demand forecast is primarily based on a combination of the preference in units based on age cohorts and the historically the types of units that have been accommodated in municipalities. Based on the market-based forecast and demographic noted in the section above, there is a market preference for ground-oriented units such as single- and semi-detached units in Peel.

Table 13: Housing Need: Market Demand Approach by Unit Type (2021-2051)

Housing Need: Market Demand Approach by Unit Type 2021-2051					
	Single/Semi	Rows	Apartment	*Accessory Units*	Total
2021	264,300	62,700	119,000	*12,200*	458,200
2051	394,700	119,600	190,300	*25,100*	729,700
Growth 2021-2051	130,400	56,900	71,300	*12,900*	271,600
%	48%	21%	26%	*5%*	100%

Source: Hemson Consulting, 2021

To achieve the market demand forecast, Peel would require 48% of the new dwelling units between 2021 and 2051 to be in single- and semi- detached built forms. The high proportion of lower density units accommodated in this approach would require a significant proportion of the new dwelling units being accommodated in the DGA. The intensification rate under the 'market demand approach' would result is estimated to be less than 40%, which is below the minimum Provincial requirement of 50% and below the Region's estimated historic rate of 46%.

Table 14: Housing Need: Market Demand Approach by Policy Area and Dwelling Type (2021-2051)

Housing Need: Market Demand Approach by Policy Area and Unit Type 2021-2051					
		DBUA	DGA	Rural Area	Total
2021	Single and Semi	219,400	36,900	8,000	264,300
	Row	52,600	10,000	<50	62,700
	Apartment	128,100	2.900	200	131,200
	Total	400,100	49,800	8,300	458,200
2051					
	Single and Semi	228,200	156,300	10,200	394,700
	Row	73,800	45,800	<50	119,600
	Apartment	202,600	12,600	200	215,400
	Total	504,600	214,700	10,500	729,700
2021-2051 Growth					
	Single and Semi	8,800	119,400	2,200	130,400
	Row	21,100	35,800	<50	57,000
	Apartment	74,500	9,700	<50	84,100
	Total	104,400	164,900	2,300	271,600

Source: Hemson Consulting, 2021

Designated Greenfield Area land supply

To determine the supply, consideration must be given to the amount of developable area remaining in greenfield areas to accommodate population and employment growth. Within Peel Region, resource protection and risk management are achieved through policies in the:

- The Regional Official Plan;
- Local Municipal Plans;
- Conservation Authority Watershed Plans and Programs; and
- The Peel Climate Change Action Plan.

Section 2.2.7.3 of the Growth Plan, 2019 outlines the environmental and non-environmental features that are considered as exclusions for the purpose of measuring the minimum density target over the Designated Greenfield Areas (See Appendix VII for detailed methodology). The following table summarizes the environmental and non-environmental takeouts.

Table 15: Environmental and Non-Environmental Take-outs for Designated Greenfield Areas by Local Municipality

Environmental and Non-Environmental Take-outs for Designated Greenfield Area by Local Municipality							
	Total DGA Land Area	Land Area "Take Outs" from DGA		DGA Land Area for Growth Plan Density Calculations (Community Area lands only)			Further Take Outs to Provide a Comparable Density Measure in Existing and Future DGA
		Environmental Features	Non-Environmental Features	Community Area	Employment Area	Total Developable Area	Undevelopable Lands*
Brampton	8,740	1,600	230	5,700	1,250	6,950	270
Caledon	2,090	300	50	1,050	660	1,710	70
Mississauga	530	170	80	280	10	290	10
Peel	11,360	2,070	360	7,000	1,920	8,920	350

*GTA West corridor (August 2020 preferred route) and Ninth Line Transitway are treated as undevelopable lands for the purposes of calculating land supply and land need, but are included within the DGA area for the purpose of measuring DGA density, in accordance with MMAH instructions for the LNA.

Note: Recently approved MZOs are not included in land supply analysis

The Region of Peel has approximately 11,000 hectares of Designated Greenfield Area (DGA) lands within existing settlement area boundaries, approximately 9,000 hectares are developable as per the Growth Plan, 2019 definition and can accommodate population and employment growth in community and employment areas. It is anticipated that approximately 4,700 hectares or approximately 60% of the DGA lands in Peel are currently developed or at an advanced stage of planning. The remaining lands are at an early stage in the development approval process, or no application has been submitted.

Table 16: Development Status of Designated Greenfield Area Lands by Local Municipality (approximate)

Development Status of Designated Greenfield Area Land (Ha) by Local Municipality				
	Developed	Planned/Committed	Undeveloped /Other	Total
Brampton	2,661	1,095	2,928	6,684
Caledon	613	277	826	1,716
Mississauga	176	0	106	280
Peel	3,450	1,372	3,861	8,680

Source: Region of Peel, 2022

The City of Brampton has the largest supply of developable DGA land to accommodate future growth followed by Caledon and Mississauga. Much of this land supply is already committed to accommodate growth in the Region to the 2031 Planning horizon as required by the in-effect Regional Official Plan. Once these lands are exhausted, the City of Brampton and Mississauga will be unable to acquire additional DGA lands as their settlement area boundaries will be fully built-out. The Town of Caledon is the last municipality in Peel with the ability to accommodate new DGA land.

To accommodate the market demand approach, it is anticipated that a housing need of an additional 165,000 units would be required in the DGA. The existing land supply in the Region is insufficient to accommodate these units.

Intensification

The policy objectives of the Growth Plan, 2019 and Land Needs Assessment refer to an intensification first approach to plan and manage growth in a manner that supports more compact built forms and transit- supportive development to leverage transit infrastructure and investment.

The market-based approach would achieve an intensification rate of approximately 40%, which is below the minimum intensification rate of 50% in the current Growth Plan and below the cumulative intensification rate of 46%, which the Region has achieved between the period of 2006 and 2020.

Table 17: Intensification Rates in Peel 2006-2020

Intensification Rates in Peel 2006-2020				
	Brampton	Caledon	Mississauga	Peel
2006	42%	44%	79%	57%
2007	24%	44%	76%	42%
2008	60%	73%	63%	62%
2009	12%	23%	91%	64%
2010	8%	10%	100%	19%
2011	14%	2%	95%	37%
2012	22%	7%	73%	31%
2013	33%	3%	90%	45%
2014	8%	0%	81%	22%
2015	9%	1%	100%	27%
2016	13%	38%	100%	45%
2017	22%	3%	100%	39%
2018	36%	30%	100%	68%
2019	38%	0%	100%	51%
2020	41%	9%	100%	55%
Cumulative Rate	25%	13%	89%	46%

Source: Peel Data Center, 2021

To support the intensification first approach to growth, the Region retained Perkins + Will Consulting to undertake an Intensification Analysis in 2020 and a 2021 Intensification Analysis Addendum to determine opportunities to accommodate forecasted growth and support intensification. The initial analysis completed in 2020 was based on a 2041 Planning horizon and the requirements of the Growth Plan, 2017. The study concluded that there was sufficient opportunities for intensification in existing and emerging Strategic Growth Areas to accommodate the higher density market segment beyond the planning horizon.

An addendum to the Intensification Analysiswas completed in 2021 to consider the 2051 planning horizon and requirements of the Growth Plan, 2020. The study concluded that there are still sufficient opportunities in Strategic Growth Areas to accommodate the higher density market segment and Provincial policy around additional residential units can support gentle density in low density residential neighbourhoods (See Appendix VIII – Intensification Strategy 2051 Addendum).

The analysis undertaken by Perkins + Will stated that over the next 30 years, housing market demand in Peel will be addressed across a range and mix of housing types. Opportunities to accommodate high density growth within new communities can be accommodated in Strategic Growth Areas. However, providing infrastructure and services to support a balanced approach to accommodating growth will be critical and must be supported by growth monitoring to identify and resolve gaps.

From a market perspective, the impact of the Pandemic and continued challenges with housing affordability will continue to impact housing market trends in the short term. Over the long term, the declining availability for lands in the DGA and continued investment in transit infrastructure and community amenities will support more growth in the delineated built-up area through Strategic Growth Areas and gentle intensification. The prioritization of growth to areas within and outside the built boundary is a strategic decision, with a range of inter-connected implications. These decisions will be critical to support the achievement of the intensification goals of the Region and local municipalities.

Strategic Growth Areas and Density Targets

Strategic Growth Areas are nodes, corridors and other areas identified by a municipality within settlement areas to be the focus for intensification and higher density mixed uses. These areas are optimal to support transit viability, make efficient use of land and infrastructure, and facilitate improved transit linkages within and between municipalities.

Strategic Growth Areas are inclusive of Urban Growth Centres, Major Transit Station Areas, and other major opportunities including areas with existing or planned frequent transit service or higher order transit corridors.

Local municipal official plans and recent local planning studies identify key opportunities for accommodating intensification in Strategic Growth Areas across the Region. Some specific examples are:

- Dundas Connects Master Plan (Mississauga);
- Brampton 2040 Vision;
- Queen Street Corridor study (Brampton)
- Inspiration Lakeview (Mississauga);
- Community Nodes (Mississauga Official Plan)
- Town Centres (Brampton Official Plan)
- Re-imagining the Mall Study (Mississauga)
- Major Transit Station Planning (many locations in Brampton, Caledon and Mississauga)

These areas serve as an opportunity to introduce more compact built forms and higher densities into existing built communities to leverage existing services and future transit investment. The built forms in these areas are typically apartments and other intensive forms such as stacked and back-to-back townhomes. The local planning studies completed or underway indicate a shift to these forms of development to accommodate housing, which deviated from the historical patterns of growth in the market forecast.

To support the achievement of these built forms, minimum density targets will be established for Strategic Growth Areas such as Urban Growth Centres and Major Transit Station Areas. Urban Growth Centres are to be planned for a minimum density of 200 people and jobs people hectare and Major Transit Station Areas are to be planned for transit-supportive densities based on the transit technology (i.e. 160 people and jobs per hectare for Bus and Light Rail Rapid Transit and 150 people and jobs per hectare for Go Rail). To support the minimum densities, a sustainable amount of growth will be allocated to these areas to reflect the local planning work and studies that have been undertaken by the local municipalities of Peel.

Table 18: Strategic Growth Areas in Peel

Strategic Growth Areas in Peel			
	Urban Growth Centres	Major Transit Station Areas	Nodes/Centres/ Corridors*
Brampton	1	24	8
Caledon	0	2	0
Mississauga	1	59	12
Peel	2	85	20

Source: Region of Peel, 2021,
*Includes centres/nodes that overlap with MTSAs
Note - totals include combined stations.

Recent trends in Development Activity

Historically, the Region has developed with a greater proportion of lower density-built forms. In 2021 it is estimated that 60% of the total units in the Region are in single- and semi- detached units.

In recent years, this development trend has been shifting. Over the last 5 years, the types of new residential units accommodated in the Region has been more diverse with a higher proportion of apartment units being developed

This development trend represents a shift in the market and an opportunity for greater mix of housing units to be accommodated throughout the Region. Other factors that may be influencing this shift is investments in transit infrastructure such as the Hurontario LRT and the continued development of Mississauga's Urban Growth Centre.

Table 19: Building Permits Issued by Dwelling Type in Peel (2016-2021)

Building Permits Issued by Dwelling Type in Peel 2016-2021				
	Brampton	Caledon	Mississauga	Peel
Single/Semi	14,961	1,278	1,495	17,734 (51%)
Row	4,037	648	570	5,255 (15%)
Apartment	1,887	149	10,090	12,126 (35%)
Total	20,885	2,075	12,155	35,115 (100%)

Source: Region of Peel, Peel Data Centre, 2021

The proportion of single- and semi- detached units in the Region is well below the historic rates in Peel. The shift in the proportion of new residential units is being driven by strong growth in the apartment segment in the City of Mississauga. As Mississauga continues to urbanize along with the City of Brampton, it is anticipated that a greater share of future growth in Peel will be in higher density-built forms.

Recommended Balanced Housing Need

To properly address housing need in the current context and project growth over the next 30 years, additional factors must be considered to support a range and mix of housing. The market-based housing needs forecast must be adjusted to address growth plan policy requirements including intensification, transit supportive development opportunities, and a need to provide for a mix and range of housing types in Peel.

Based on some of the factors noted above, the type of housing units required to support the forecasted population growth in the Region needs to be adjusted from the market-based forecast to reflect the local conditions and factors referenced above. A more balanced approach is proposed that considers the existing land supply of the municipalities, the intensification objectives from the Growth Plan, and local municipal planning work for strategic growth areas. The balanced approach is informed by the scenario work undertaken through the Growth Management Program, including analysis and discussion with internal and external stakeholders.

Table 20: Housing Need: Balanced Approach by Dwelling Type 2021-2051

Housing Need: Balanced Approach by Unit Type 2021-2051					
	Single/Semi	Rows	Apartment	*Accessory Units*	Total
2021	264,300	62,700	119,000	*12,200*	458,200
2051	342,000	126,300	236,400	*25,000*	729,700
Growth 2021-2051	77,700	63,600	117,400	*12,800*	271,600
%	29%	23%	43%	*5%*	100%

Source: Hemson Consulting, 2021

While this outcome deviates from the market-based approach, it does recognize that low density housing forms will still play a role in accommodating new growth in Peel, but as the local municipalities continue to urbanize and higher order transit is built, development will become more compact, and areas will intensify.

R3 – Housing Need Allocation

The allocation of housing need to the local municipalities is informed by the ability of each municipality to accommodate the range of dwelling types that inform the overall housing need for the Region. The type of dwelling units that can be accommodated within municipalities is informed by Policy Areas and land supply.

The allocation of housing need for Peel is premised on the more urbanized local municipalities that have access to transit service and existing and planner higher order transit service accommodating a larger proportion of the high density-built forms such as apartment units. This type of growth commonly occurs in the designated built-up areas or existing urbanized areas.

The lower density-built forms such as single- and semi- detached units are directed to the communities that have unplanned lands within their existing designated greenfield areas or the potential to accommodate growth on newly designated greenfield areas through Settlement Area Boundary Expansion.

The allocation of housing need based on the balanced approach results in an intensification rate of 55% of the total units forecasted to accommodate new growth within the delineated built-up-area. This figure supports the local aspirations for more transit-oriented development throughout the Region in Strategic Growth Areas, while balancing market demand and the forecast age cohorts. To achieve this rate of intensification, more family sized apartment units will be required to balance transit-oriented development with accommodating family-aged residents inPeel.

The majority of new single- and semi- detached units will be accommodated within the DGA, along with a higher proportion of more dense built forms, such as townhomes and apartments.

The delineated built-up-area will accommodate apartment-built forms which include apartments above and below five storeys, stacked and back-to-back townhomes, accessory units, and to a lesser extent, some single- and semi- detached units.

Table 21: Housing Allocation by Policy Area and Dwelling Type 2021-2051

Housing Allocation by Policy Area and Dwelling Type 2021-2051					
		DBUA	DGA	Rural Area	Total
2021	Single and Semi	228,000	38,000	8,000	274,000
	Row	56,000	10,000	<50	66,000
	Apartment	114,000	3,000	200	117,000
	Total	398,000	51,000	8,300	457,000
2051					
	Single and Semi	240,000	103,000	9,000	352,000
	Row	79,000	50,000	200	130,000
	Apartment	228,000	19,000	200	247,000
	Total	547,000	173,000	10,000	729,000
2021-2051 Growth					
	Single and Semi	12,000	65,000	1,000	78,000
	Row	23,000	40,000	150	64,000
	Apartment	114,000	16,000	0	130,000
	Total	149,000	122,000	2,000	272,000

Source: Hemson Consulting, Sept 2021

The allocation of housing need corresponds with the availability of land by policy areas. The local municipalities of Brampton and Mississauga have a larger share of lands within the delineated built-up area and more existing urban amenities and service such as transit and community facilities will accommodate a larger share of the higher density-built forms. Municipalities such asCaledon, that are still urbanizing but have the potential to accommodate lower density-built formswill have a higher proportion of single- and semi- detached units.

Table 22: Housing Allocation to Local Municipalities by Dwelling Type 2021-2051

Housing Allocation to Local Municipalities by Dwelling Type 2021-2051					
		Brampton	Caledon	Mississauga	Peel
2021	Single and Semi	125,000	21,000	128,000	274,000
	Row	26,000	2,000	38,000	66,000
	Apartment	35,300	1,000	80,000	117,000
	Total	186,000	24,000	247,000	457,000
2051		Brampton	Caledon	Mississauga	Peel
	Single and Semi	159,000	61,000	133,000	352,000
	Row	53,000	25,000	51,000	130,000
	Apartment	79,000	5,000	163,000	247,000
	Total	291,000	92,000	347,000	729,000
2021-2051 Growth		Brampton	Caledon	Mississauga	Peel
	Single and Semi	34,000	40,000	4,000	78,000
	Row	27,000	23,000	13,000	64,000
	Apartment	43,000	4,000	83,000	130,000
	Total	104,000	68,000	100,000	272,000

Source: Hemson Consulting, Sept 2021

R4: Housing Supply Potential by Policy Area

To determine how the Region of Peel is positioned to accommodate the forecasted housing need, an assessment of the existing supply of land and its ability to accommodate the forecasted units by type and policy area is required. This is of particular importance to the designated greenfield areas, where land supply limitations may impact the ability to accommodate specific types of units.

Delineated Built-up-area (DBUA)

The DBUA is the largest policy area in the Region and is forecasted to accommodate the majority of the growth in Peel. The majority of growth within the DBUA will be directed to Strategic Growth Areas such as Urban Growth Centres, Major Transit Station Areas, and Node/Town Centres. The existing policy areas in the Region identify the DBUA and Urban Growth Centres as the primary focal points for growth. Through the Peel 2051 Official Plan Review and MCR, the Region will be delineating and establishing minimum transit supportive densities for Major Transit Station Areas and identifying other Strategic Growth Areas such as nodes, centres, and corridors where further local planning will be undertaken. Appendix IX identifies the Strategic Growth Areas that are proposed in the Region's work to support more intensive development within the DBUA to meet the policy objectives of the Growth Plan, 2019 and the minimum intensification target of the Region.

All Strategic Growth Areas in the Region will not achieve their full development potential and/or planned minimum densities within the planning horizon. Strategic Growth Areas will need to be prioritized within the context of Provincial policy and strategic local objectives to support growth in a manner that responds to local character and supporting investments in transit.

In addition, further opportunities for gentle intensification and infill are available throughout the DBUA to support a range and mix of housing choices. Additional Residential Units (ARU) present an opportunity to create affordable rental opportunities within existing communities and provide gentle intensification.

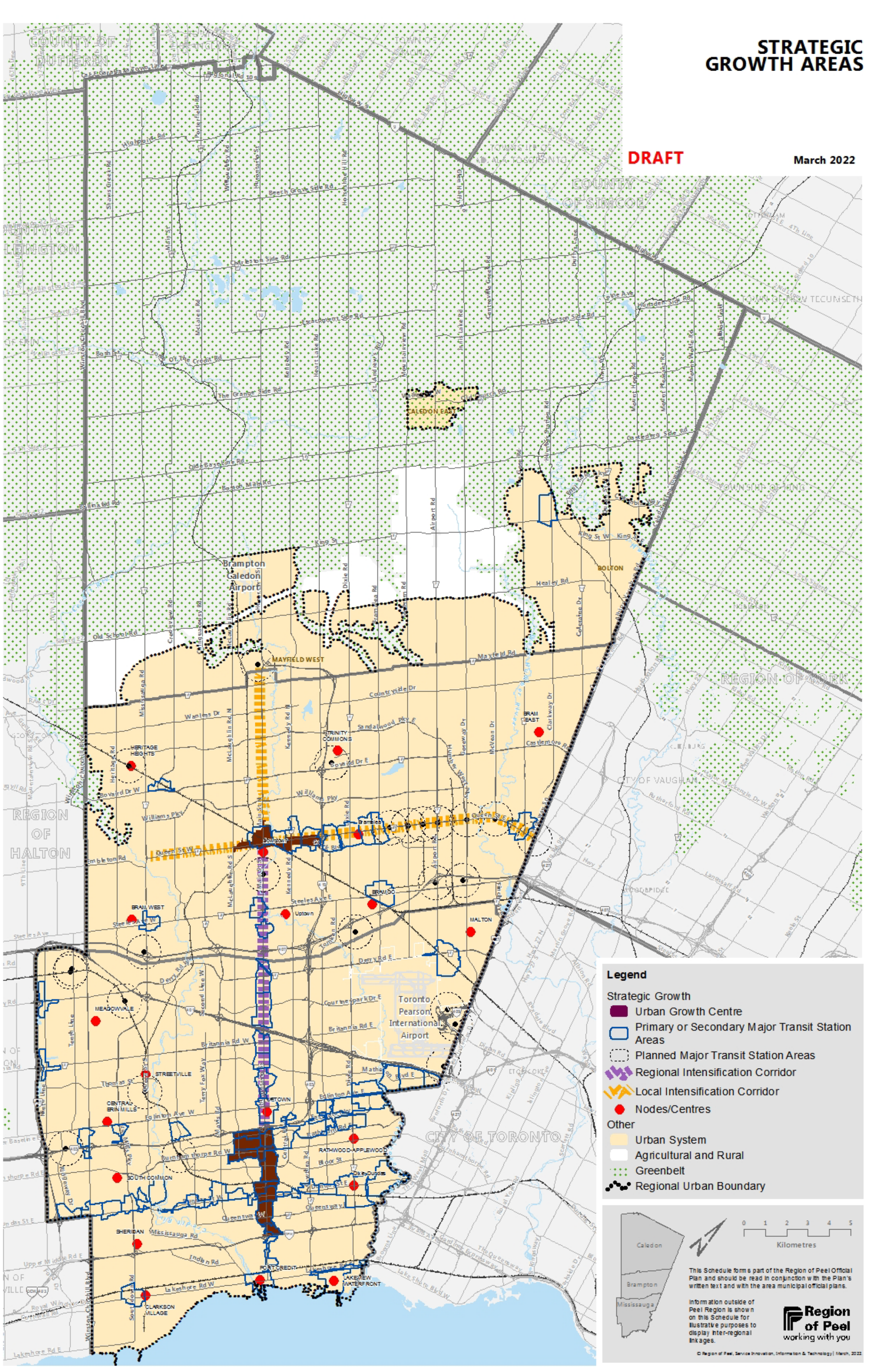

Figure 5: Strategic Growth Areas

Designated Greenfield Area

The Region has approximately 11,000 hectares of land in designated greenfield areas, with approximately 7,000 hectares in Community Area lands that can support residential and service-related employment growth.

Analysis undertaken by Hemson Consulting estimate that approximately 50,000 units and 220,000 residents and jobs are currently being accommodated in the Region's Community Area DGA land. The current density measured across the entire existing DGA (developed and undeveloped) is approximately 31 residents and jobs per hectare. It should be noted that approximately 60% of the Region's vacant DGA is unbuilt. If DGA density is measured across the developed lands in Peel, it is estimated that the density of the existing DGA across Peel is approximately 56 residents and jobs per hectare.

Over the next 30 years, it is estimated that an additional 74,000 units and 280,000 additional residents and jobs can be accommodated on the remaining Community Area DGA land in Peel. By the 2051 planning horizon,the minimum density that will be achieved on the existing DGA land across Peel wlbe approximately 70 residents and jobs per hectare. The recommended minimum density of 70 residents and jobs across Peel is a blended figure that reflects proposed and planned densities in the DGA communities of the local municipalities in Peel.

Table 23: Existing Capacity and Development Potential in existing Designated Greenfield Areas by Local Municipalities 2021-2051

Existing Capacity and Development Potential in Designated Greenfield Areas by Local Municipalities 2021-2051				
	Mississauga	Brampton	Caledon	Peel
Population of Community Designated Greenfield Area (currently designated), 2021	15,400	176,000	15,200	206,600
Total units of Community Designated Greenfield Area	4,200	41,000	4,500	49,800
Single/Semi	*2,300*	*31,300*	*3,300*	*37,000*
Row	*1,300*	*7,500*	*1,200*	*10,000*
Apartments	*600*	*2,300*	*10*	*2,900*
Employment in Community Designated Greenfield Area (currently designated), 2021	800	11,300	990	13,100
Total Persons plus Jobs in Community Designated Greenfield Area, 2021	16,200	187,300	16,200	219,700
Developable Community Land Area for Density Calculation, per Growth Plan definition (ha)	**280**	**5,700**	**1,050**	**7,000**
Developable Community Land Area for Density Calculation, per Growth Plan definition (ha), excluding undeveloped lands	270	5,500	1,014	6,800
Designated Greenfield Area, Community Area Density in person + jobs per ha, 2021	**58**	**33**	**15**	**31**
Designated Greenfield Area, Community Area Density in person + jobs per ha, 2021, excluding undevelopable lands	60	34	16	32
Population of Community Designated Greenfield Area (as currently designated), 2051	24,200	363,000	51,000	438,200
Total units in Community Designated Greenfield Area	8,200	98,800	16,500	123,600
Single/Semi	*2,300*	*60,800*	*9,900*	*73,100*
Row	*2,400*	*24,900*	*5,900*	*32,900*
Apartments	*3,500*	*13,100*	*700*	*17,500*
Employment in Community Designated Greenfield Area (as currently designated), 2051	1,350	46,120	9,880	57,350
Total Person plus Jobs in Community Designated Greenfield Area, 2051	25,500	409,100	60,900	495,500
Developable Land Area for Density Calculation, per Growth Plan Definition (ha)	**280**	**5,700**	**1,050**	**7,000**
Developable Land Area for Density Calculation, excluding undevelopable lands	270	5,500	1,014	6,800
Designated Greenfield Area, Community Area Density in residents + jobs per ha, 2051	**91**	**72**	**58**	**71**
Designated Greenfield Area, Community Area Density in residents + jobs per ha, 2051, excluding undevelopable lands	94	74	60	73

Source: Hemson Consulting, 2022

Note: Undevelopable lands includes portions of the GTA West corridor within the existing DGA in Brampton and Caledon and Ninth Line transitway lands in Mississauga

To support the Region in achieving the minimum designated greenfield area density, the proposed density for each municipality reflects the current urban fabric and future development potential, including the availability of transit infrastructure and amenities to support higher densities. For greenfield areas that will be accommodate through Settlement Area Boundary Expansion (SABE), a minimum density of 65 people and jobs per hectare is being recommended.

As boundary expansion can only be accommodated in the Town of Caledon, the minimum density recommended is below the overall density for Peel as a result of the characteristic of the Caledongreenfield area. Caledon, compared to Brampton and Mississauga, has a less robust transit service,fewer transit stations/infrastructure, need additional community centres and facilities to supportgrowth, and large regional infrastructure (i.e., stormwater ponds) that will be required to accommodate new growth. These factors impact the ability of the Town to achieve higher minimum designated greenfield area densities.

Rural Areas

The Rural Areas in Peel include the Palgrave Estate Residential Community, Rural Settlement, and Agriculture and Rural land. Limited opportunities are available within these areas as they are protected by provincial policies such as the Greenbelt Plan, Niagara Escarpment Plan, and Oak Ridges Moraine Plan. The agricultural and rural lands located outside of provincial policies and outside of existing settlement areas constitute the 'whitebelt' lands. Minor opportunities for infill development and lot severances are available within existing policy frameworks, or more urban development may occur where it is demonstrated as appropriate through a SABE study and in accordance with Provincial policy.

R5: Community Area Jobs

Community Area jobs are comprised of population-based services and major office jobs to meet the needs of the population. The existing DGA in Peel can accommodate approximately 58,000 additional jobs on community area lands to support meeting the minimumdensity. This figure translates to approximately 8 people per job across the entire DGA.

Table 24: Community Area Jobs in Designated Greenfield Areas by Local Municipality

Total Designated Greenfield Area Community Area Jobs		
	2021 DGA	2051 Existing DGA
Brampton	8,300	48,800
Caledon	1,000	8,300
Mississauga	800	1,000
Peel	10,100	58,100

Source: Hemson Consulting, 2021

R6: Need for Additional Land

The existing DGA in Peel can accommodate an additional 74,000 units between 2021 and 2051. Whereas the housing demand by policy area indicates an additional 124,000 units are required to accommodate the housing need under the balanced approach within DGA to 2051.

Table 25: Housing Need Allocation Shortfall

Housing Need Allocation Shortfall					
	Total DGA Units	Total DBUA Units	Intensification Rate	2021 DGA Remaining Unit Potential	Unit Shortfall
Market Based Approach	165,000	104,000	39%	74,000	91,000
Balanced Approach	124,000	145,000	55%	74,000	50,000

Source: Hemson Consulting, 2021

The balanced approach to housing need results in a shortfall of approximately 50,000 units to be accommodate within the DGA. The additional units to be accommodated translates to approximately 175,000 additional people and 20,000 additional Community Area jobs. This shortfall can only be accommodated within the Town of Caledon, as Brampton and Mississauga do not have any additional lands to expand their urban settlement boundaries. As a result, a planned density of 65 residents and jobs per hectare is recommended to determine that a land area of approximately 3,000 hectares for new Community Area is required.

Table 26: Community Area Land Need (Balanced Approach)

Community Area Land Need	
Total Units Shortfall	50,000
Total Residents	175,000
Planned Total Jobs (8 People: 1 Job)	20,000
Total R+J	195,000
Planned Density (Caledon)	65
Community Area Land Need (ha)	3,000

Source: Hemson Consulting, 2021

EMPLOYMENT AREA

The Employment Area Land Needs Assessment relies on the employment forecasts contained in Schedule 3 of the Plan to determine the forecasted numbers of jobs by type. The following are the required components in the Employment Area LNA:

E1 - Employment Forecasts

The employment forecasts in Schedule 3 of the Growth Plan forms the basis for the minimum amount of growth that must be planned for in the Region. The Provincial forecast anticipates that Peel Region will accommodate a significant amount of the job growth forecasted for the Greater Golden Horseshoe. Overall, the Region of Peel will remain the second largest job market in the Greater Toronto and Hamilton Area and accommodate the second most new jobs between 2021and 2051, only behind York Region.

Table 27: Employment Allocation to Greater Toronto and Hamilton Area (GTHA) Municipalities

Growth Plan – Employment Allocation to Greater Toronto and Hamilton Area Municipalities			
	2021	2051	2021-2051
Toronto	1,697,000	1,980,000	282,000
Peel	736,000	1,070,000	334,000
York	580,000	990,000	414,000
Durham	239,000	460,000	225,000
Halton	278,000	500,000	220,000
Hamilton	238,000	360,000	119,000
GTAH Total	3,765,000	5,360,000	1,595,000
GGH Total	4,794,000	7,010,000	2,214,000

Source: Hemson Consulting, 2020 (prepared for the Municipal Affaires and Housing).

To accommodate the forecasted 1,070,000 million jobs by 2051, the Region will need to accommodate an additional 335,000 jobs. While this growth is significant, historically the Region of Peel has been positioned to accommodate a significant share of provincial employment. Between 1991 and 2021 the Region accommodated growth of approximately 360,000 jobs.

Table 28: Historic and Forecasted Employment Growth in Peel

Region of Peel - Historic and Forecasted Employment Growth							
	1991	2001	2011	2021	2031	2041	2051
Employment	378,200	534,300	650,400	735,600	862,800	959,100	1,070,000
1991-2021	357,400						
2021-2051				334,400			

Source: Source: Statistics Canada Census 1991-2011, Region of Peel Official Plan (2021 forecast), Hemson Consulting (2021 est).

The allocation of employment within the Region to support the Land Needs Assessment considers 3 general categories from Statistics Canada that captures where and how people work (Place of Work Status). The categories are defined as:

Usual Place of Work – A person who reported to the same workplace location as the beginning of each shift.

No Fixed Place of Work – A person who does not leave from home and go to the same workplace location at the beginning of each shift (i.e. building/landscape contractors, truck drivers)

Work from Home - A person whose job is located in the same building as their place of residence, live and work of the same farm, building super intendents, teleworkers who spend most of their work week working at home

The majority of employment within the Region will be accommodated with people at usual places of work, followed my modest job growth in no fixed place of work. Work from home or tele-work is an emerging trend that may impact the portion of people who report working from home. Statistics Canada defines tele-work as people who spend more than half of one-week working from their residences. As a result of the 2020-2021 Covid-19 pandemic, work from home has become more common practice for the white-collar workforce in industries that permit such arrangements. Looking to the future, there is uncertainty around what new workforce arrangements may unfold. Analysis undertaken by Cushman and Wakefield in (Appendix X) notes a desire for office work to return but in a different capacity take supports more agile and flexible work practices. It is unclear what impact this may have on employment reporting but monitoring new and emerging trends on workforce planning will be required to support land use planning.

Table 29: Employment Forecast by Place of Work Status 2021-2051

Employment Forecast by Place of Work Status						
	2021	2031	2041	2051	2021-2051	%
Usual Place of Work	612,400	718,800	798,600	891,400	279,000	83%
No Fixed Place of Work	81,600	95,200	105,500	117,200	35,600	11%
Work from Home	41,400	48,800	55,100	61,400	20,000	6%
Peel	735,500	862,800	959,200	1,070,000	334,500	100%

Source: Hemson Consulting, 2021

Employment by Type

For the purposes of land use planning, employment sectors are captured in 5 general categories that reflect the built-forms and locational attributes of jobs to support land use planning. These categories are as follows:

Employment Land Employment – Refers to industrial type jobs that are typically land intensive forms of development and located in single story developments (i.e. manufacturing, research and development, warehousing, logistics, wholesale trade)

Population related employment – employment that supports residents in single- and mixed- use built-forms through commercial, retail, and institutional uses (i.e., school, hospitals, retail and convenience stores)

Major Office – In the Growth Plan, Major Office is described as "Freestanding office buildings of approximately 4,000 square metres of floor space or greater, or with approximately 200 jobs". For the purpose of this analysis, Major Office Employment is "employment occurring in freestanding office buildings of 1,860 m2 (20,000 sf) or more.

Home based Jobs – A job located in the same building as the persons residence (see work from home)

Rural Employment - This type of employment is most predominantly related to natural resources, agriculture, tourism, and recreation, in rural areas outside of settlement areas

Employment in Peel over the next 30 years will be supported by more urban forms of jobs growth. Mississauga and Brampton will continue to intensify existing employment areas and shift their focus to jobs that can be accommodated in more compact mixed-use contexts such as Major Office and Population-Related Employment jobs.

The broader Greater Toronto and Hamilton Area (GTHA) market is experiencing a shift in job growth by employment sector as how people choose to work, and the location of job opportunities evolves. In 2019, the Region of Peel commissioned the MOWAT Centre to undertake a study titled "Rethinking Municipal Finance for the New Economy". The report included conclusions that the Peel economy is in transition and has shifted from goods production to good movement including manufacturing plants being replaced by warehouses and distribution centres. In addition, the service sector continues to expand with an emphasis on knowledge-based jobs.

The shifts merit an update employment policy framework to ensure sufficient policy flexibility is available to respond to market changes and provide sufficient opportunities for employment growth.

Employment Land Employment will still play a major role in accommodating employment in Peel, but its share of total employment growth will be lower than historic levels. This is partially due to the availability of land, as Caledon will be the only municipality in Peel that will be able to accommodate this type of employment growth on newly designated greenfield lands.

Table 30: Employment Forecast by Employment Categories in Peel 2021-2051

Employment Forecast by Employment Category 2021-2051						
	Major Office	Population Related	Employment Land	Home Based	Rural Employment	Total
2021	137,200	184,600	366,600	41,700	5,500	736,000
2031	169,400	227,300	412,500	49,000	5,700	863,000
2041	202,700	263,900	432,300	54,400	5,700	959,100
2051	247,200	296,500	458,900	61,700	5,700	1,070,000
	Share of Growth by Category					
2021-2051	33%	34%	28%	6%	0%	100%
	Employment Growth by Category					
2021-2051	110,000	111,900	92,300	20,000	200	334,000

Source: Hemson Consulting, 2021

E2 - Employment Allocation

The allocation of employment to the local municipalities considers the existing employment areas within Peel, the type of employment commonly accommodated, and policy directions.

Table 31: Employment Allocation by Planning Area and Employment Category 2021-2051

Employment Allocation by Planning Area and Employment Category 2021-2051					
		Community Area	Employment Area	Rural Area	Total
2021	Employment Land Employment	10,700	355,900	100	366,700
	Population-related employment	159,700	24,900	0	184,600
	Major Office	31,500	105,600	0	137,100
	Home-Based Employment	40,100	0	1,700	41,800
	Rural	0	0	5,500	5,500
	Total	242,000	486,400	7,300	736,000
2051	Employment Land Employment	9,200	449,600	0	458,900
	Population-related employment	254,600	41,900	0	296,500
	Major Office	73,800	173,400	0	247,200
	Home-Based Employment	58,900	600	2,200	61,700
	Rural	0	0	5,700	5,700
	Total	396,500	665,600	7,900	1,070,000
2021-2051	Employment Land Employment	900	91,500	0	92,400
	Population-related employment	96,600	15,300	0	111,900
	Major Office	42,000	68,000	0	110,000
	Home-Based Employment	19,300	300	400	19,900
	Rural	0	0	200	200
	Total	158,700	175,100	500	334,000

Source: Hemson Consulting, 2021

The broader Greater Golden Horseshoe has been in a period of structural economic change as employment growth once driven by the manufacturing sector shifts to more service and knowledge-based industries. Various macro-economic trends including globalization, automation, and industry efficiencies have led to an overall decline in the amount of manufacturing jobs. The same forces have driven rapid growth in the warehouse and distribution, retail, and professional and technical service sectors.

The industrial sector which is accommodated in Employment Areas will continue to be critical to the economic health of the Region. Peel's Employment Areas benefit from access to 400 series highways, the Pearson International Airport, and close border access. While jobs are a good measure for employment, they do not capture the other benefits Employment Areas provide such as supporting the existing tax base, providing a diversified land base, leveraging existing and planned goods movement and freight infrastructure, aligning with provincial investments, and supporting local opportunities for employment services such as Ontario Works. The City of Brampton and Town of Caledon will account for the majority of ELE Job growth in Peel over the next 30 years due to their availability of land in designated greenfield areas to accommodate more land intensive forms of employment.

On the other side of these trends, growth in Population Related Employment and Major Office which include employment sectors such as, retail, finance and insurance, educational services, and healthcare and social assistance are on the rise. While the service-knowledge based sectors are driving the new economy, this has not translated to new office development in the Region. In recent years, the Region has not been meeting its employment forecasts, with a lack of office development being one of the contributing factors. One of the challenges facing the Region and many of the 905 municipalities is the shift of office development from suburban locations to urban environments such as downtown Toronto. Which is now compounded by an uncertainty future for office work as Work from Home (WFH) has become an option for many workforces.

Table 32: Employment Allocation by Employment Category to the Local Municipalities 2021-2051

Employment Allocation by Employment Category and Local Municipalities 2021-2051					
		Brampton	Caledon	Mississauga	Peel
2021	Employment Land Employment	100,000	18,000	249,000	367,000
	Population-related employment	76,000	4,000	104,000	185,000
	Major Office	21,000	<250	116,000	137,000
	Home-Based Employment	14,000	4,000	24,000	42,000
	Rural Employment	-	6,000	-	6,000
	Total	211,000	32,000	493,000	736,000
2051	Employment Land Employment	131,000	66,000	262,000	459,000
	Population-related employment	129,000	32,000	135,000	296,000
	Major Office	75,000	9,000	163,000	247,000
	Home-Based Employment	20,000	11,000	30,000	62,000
	Rural Employment	-	6,000	-	6,000
	Total	355,000	125,000	590,000	1,070,000
2021-2051	Employment Land Employment	31,000	48,000	13,000	92,000
	Population-related employment	53,000	28,000	31,000	112,000
	Major Office	54,000	9,000	46,000	110,000
	Home-Based Employment	6,000	8,000	6,000	20,000
	Total	145,000	93,000	97,000	334,000

Source: Hemson Consulting, Sept 2021

With the changing nature of employment and uncertainty as a result of the Pandemic, The Region retained Cushman and Wakefield to update its Employment Strategy Discussion Paper to provide direction and recommendations for the Region to undertake to support meeting its employment forecasts and anticipated growth. Cushman and Wakefield advise, risks to accommodating, sustaining, and growing employment lie in the misallocation of resources – either allocating too few, too many, or locating them incorrectly, which could contribute to the employment growth forecast not being achieved.

E3 - Existing Employment Area Potential

Employment Land Employment is the driver for determining the amount of land needed to accommodate future uses. To determine the land needs for Employment Land Employment, the supply of land must be assessed. Staff have determined that there are approximately 2,000 hectares of vacant land within the Regions Employment Areas in designated greenfield areas and the delineated built-up area. The methodology for the vacant land inventory is attached as Appendix XI.

Table 33: Vacant Employment Area Lands by Local Municipality

Vacant Employment Area Land by Local Municipality				
	Vacant	Vacant Low Potential	Underutilized	Total
Brampton	730	130	140	1,000
Caledon	280	0	30	310
Mississauga	570	0	100	670
Peel	1,580	130	270	1,980

Source: Region of Peel, 2021

Employment growth in the transportation, logistics, and warehousing sectors are typically land extensive and require locations in new Employment Areas. This includes home-based employment and no fixed place of employment. The continued advancement of automation and efficiency in industrial facilities may impact planning assumptions about the number of jobs that will be accommodated in Employment Areas. Some service-knowledge sector jobs do locate in traditional Employment Areas. While these uses typical provide more jobs and increased densities, they can have the negative impact of creating land use compatibility issues that impact the ability of existing or potential new industries to operate.

The existing supply of Employment Area lands in Peel is planned to be intensified between 2021 and 2051. This includes the development of existing vacant lands with potential and the intensification of existing employment lands. Staff anticipate an overall density of 42 jobs per hectare in Peel's Employment Areas by 2051.

Table 34: Employment Area Capacity and Density by Local Municipality 2021-2051

Employment Area Capacity and Density by Local Municipality 2021-2051				
	Brampton	Caledon	Mississauga	Peel
2021	116,000	18,000	352,000	486,000
2021 Density	24	14	40	33
2051	182,000	34,000	405,000	621,000
2051 Density	38	27	46	42
2021-2051 Growth	66,000	16,000	53,000	135,000

Source: Hemson Consulting, 2021

It should be noted that as Peel has urbanized, the older Employment Areas in communities such as Brampton and Mississauga have a higher employment density, compared to newer Employment Areas which may accommodated more land intensive employment forms such as logistics and warehousing, which traditionally yield lower densities.

E4 - Need for Additional Land

Based on the existing supply of Employment Areas is Peel, there is a need to accommodate an additional 38,000 Employment Area jobs through settlement area boundary expansion. These jobs will be accommodated in Employment Areas within theTown of Caledon. The average density to be achieved in these areas is approximately 26.4 jobs per hectare, which is generally consistent with the Region's densities in the 2020 Development Charges Background Study.

Table 35: Employment Area Land Need

Employment Area Land Need	
2051 Employment Area Jobs	661,000
2021 Employment Area Supply	621,000
Employment Area Job Need (including some Major Office Employment)	40,000
Employment Area Job Need	38,000
New Area Density	26.4
Employment Area Land Need	1,400

Source: Hemson consulting, 2021

An approximate land need of 1,400 hectares of new Employment Area land would be required to accommodate the forecasted shortfall.

ADJUSTMENTS

Mississauga Ninth Line Transitway

The most recent Mississauga Ninth Line Transitway corridor design was from November 20, 2019. According to the technical plans, the average width is approximately 12 meters. Regional staff has updated the corridor shapefile to reflect the technical plans. The Ninth line subject land is inclusive of features that would be captured as 'take-outs' as defined in the Growth Plan, 2020 and the Ninth Line transit ROW which is approximately 10 hectares.

Table 36: Environmental and non-environmental features in the Ninth Line Area

Environmental and non-environmental features in the Ninth Line Area		
Features	Category	Area (ha)
Mississauga Ninth Line Natural Heritage System	Environmental	69.6
Ninth Line Flood Plains	Environmental	127
Railway Right of Way	Non-Environmental	1
Hydro Transmission Corridors	Non-Environmental	5.6
TransCanada Pipeline Right of Way	Non-Environmental	2.8
Existing 400 Series Highways ROW	Non-Environmental	150
Employment Area	Non-Environmental	14
Ninth Line Transitway	Undevelopable Land	10 12 (with proposed station areas)
Total Non-Developable (includes Ninth Line Transitway	-	240
Total Developable Land	-	95

GTA West Transportation Corridor

The GTA West Transportation Corridor (Highway 413) is not a freeway as part of the Ontario Road Network to date. The portion of the corridor that is within the existing Designated Greenfield Areas in the Region is proposed to be excluded as undevelopable lands in the Land Needs Assessment as the infrastructure is a protected corridor as per the Official Plan. The lands are within a protected corridor and will not contributed to the developable supply of land and densities within the Region's existing Designated Greenfield Area.

Table 37: GTA West Transportation Corridor Area within Existing DGA

GTA West Transportation Corridor Area within Existing DGA		
	Community Area	Employment Area
Brampton	205	63
Caledon	36	35
Mississauga	0	0
Peel	241	98

Brampton-Caledon Airport

The Brampton Caledon Airport lands area (81 ha) is preserved for potential employment use; however, the land consists of paved runways, which do not contribute to the supply of land in the existing Designated Greenfield Area. It is recognized that these lands will be captured as undevelopable for the purpose of measuring existing Employment Area land supply.

Employment Land Conversion

The Region has received 59 employment conversion requests to-date that captures approximately 470 hectares of land within the Regions proposed Employment Area designation. Based on staff's recommendations in the employment conversion analysis attached as Appendix XIV, approximately 275 hectares of land were excluded from the Employment Area designation mapped in the Regional Official Plan as Schedule E-4. The results of the employment conversion analysis have already been accounted for in the land needs assessment.

CONCLUSION

The Region of Peel is forecasted to accommodate a significant share of the overall population and employment growth forecasted for the Greater Golden Horseshoe. Approximately 700,000 people and 335,000 jobs will be coming to Peel in the next 30 years.

The manner in which growth will be accommodated in the next 30 years will shift away from historic patterns of development. Growth will be accommodated using a balanced approach that addresses market demand and policy objectives such as climate change, efficient use of infrastructure, supporting complete communities, healthy development, affordable housing, age friendly planning, sustainable transportation, and fiscal sustainability.

The results of the Land Needs Assessment indicate that the Region will require an additional 3,000 hectares of Community Area land and 1,400 hectares of Employment Area land to accommodate new growth to the planning horizon. The location of this new growth will be addressed through Settlement Area Boundary Expansion (SABE).