



Peel2041+

Land Needs Assessment and Intensification Analysis

Planning and Growth Management Committee

April 29, 2021

Duran Wedderburn
Regional Planning & Growth Management
Region of Peel

Paul Kulig
Perkins & Will



What is a Land Needs Assessment?

A technical study that determines how much land is needed to accommodate forecasted growth to the Planning horizon.

Two components:

- **Community Area:** for housing, population-related jobs and office jobs.
- **Employment Area:** employment land jobs (industrial, manufacturing, warehousing) and some office and population –related jobs.





Methodology for LNA

Community Area

1. Population Forecasts
2. Housing Need
3. Allocation of Housing Need
4. Housing Supply Potential by Policy Area
5. Community Area jobs
6. Need for additional land

Employment Area

1. Employment Forecasts
2. Employment Allocation
3. Existing Employment Area Potential
4. Need for additional land

Community Area Land Need



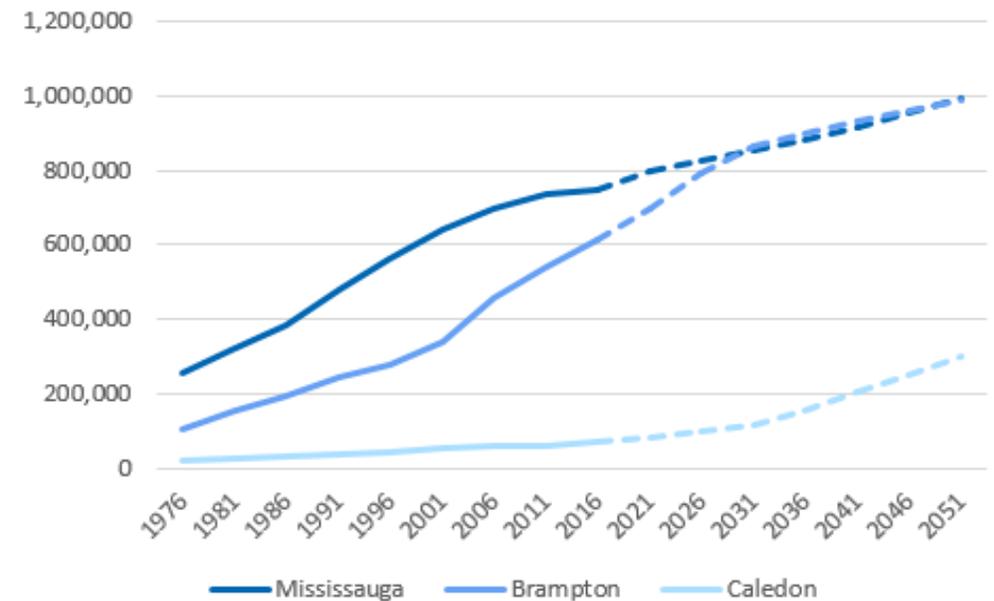
2051 Population Forecast

Population Forecasts 2021 & 2051
Draft Municipal Allocation

	2021	New 2051
Municipality	Population	Population
Caledon	81,000	300,000
Brampton	698,000	985,000
Mississauga	799,000	995,000
Peel	1,578,000	2,280,000

The Region of Peel is forecasted to accommodate an additional 700,000 people by 2051

Peel Region Historical and Forecasted Population Allocation





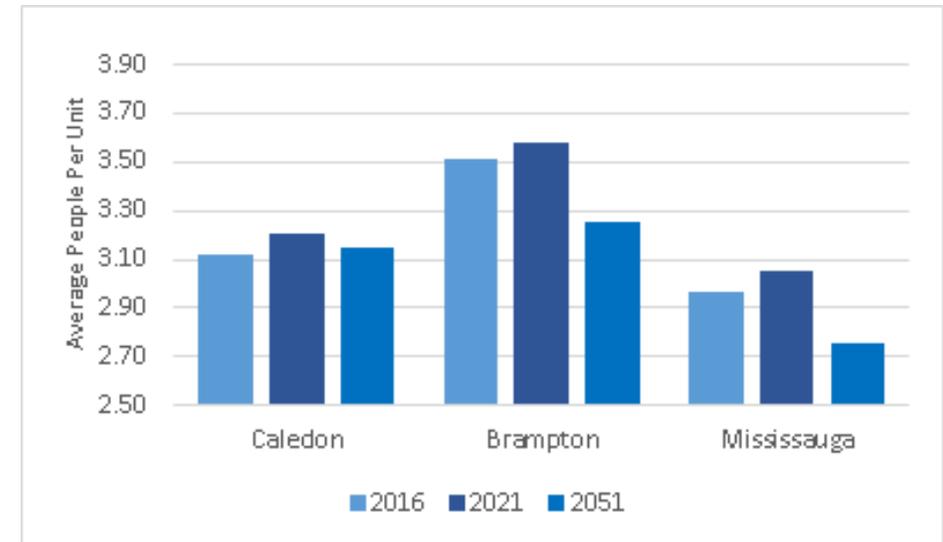
Households

New Household Forecasts 2021 & 2051
Draft Municipal Allocation

	2021	New 2051
Municipality	Units	Units
Caledon	24,000	92,000
Brampton	186,000	292,000
Mississauga	246,000	344,000
Peel	456,000	727,000

The Region of Peel is forecasted to accommodate an additional 270,000 units by 2051

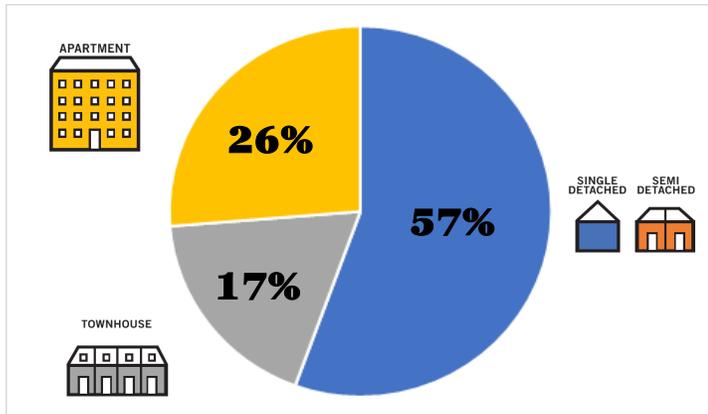
Peel Region Historical and Forecasted Average Persons Per Unit



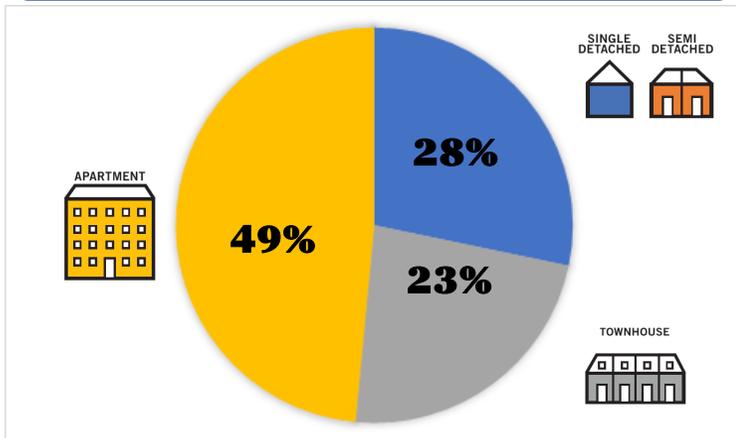


Housing Mix Shift

Growth By Unit Type (%) 2001-2021



New Growth By Unit Type (%) 2021-2051



Total Unit Mix (%) 2021



Total Unit Mix (%) 2051

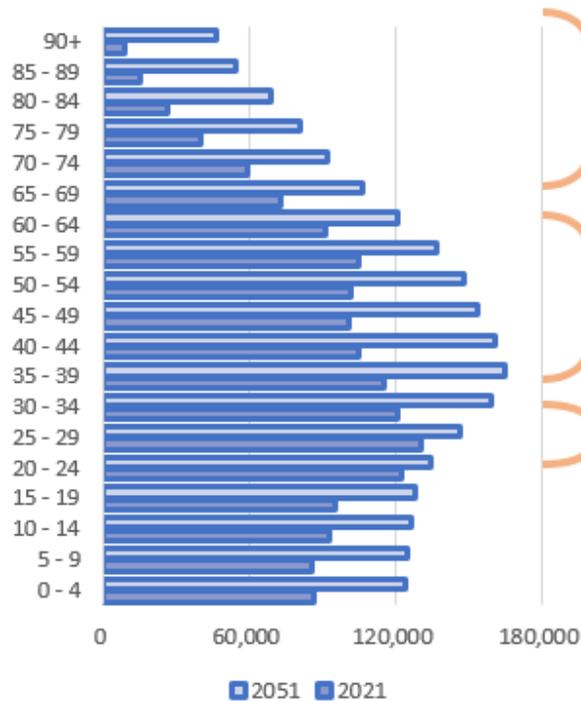




Household and Housing Growth

- Age influences number of households and housing preferences

Population Age Structure
Peel Region, 2021 and 2051

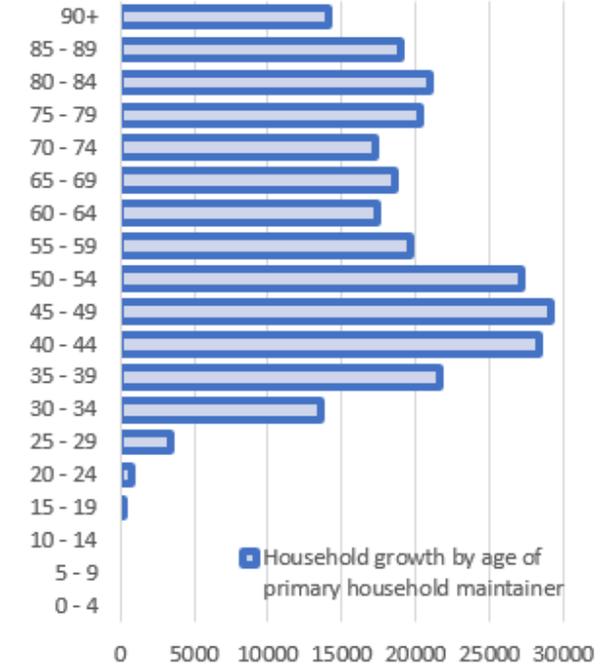


Seniors' smaller households mean faster growth than their population

Largest number of new households at ages where families with children dominate

Very little growth of young adults means few new households for this group

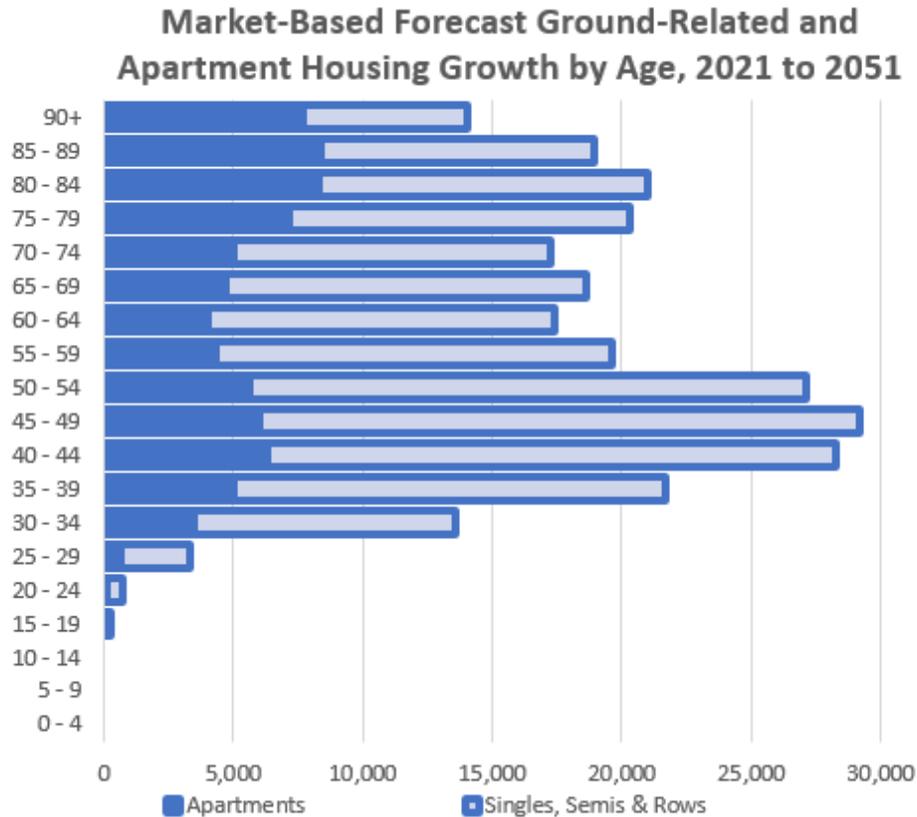
Peel 2021 to 2051 Household Growth by Age





Household and Housing Growth

- LNA needs to explain balance between market-demand housing mix and intensification policy

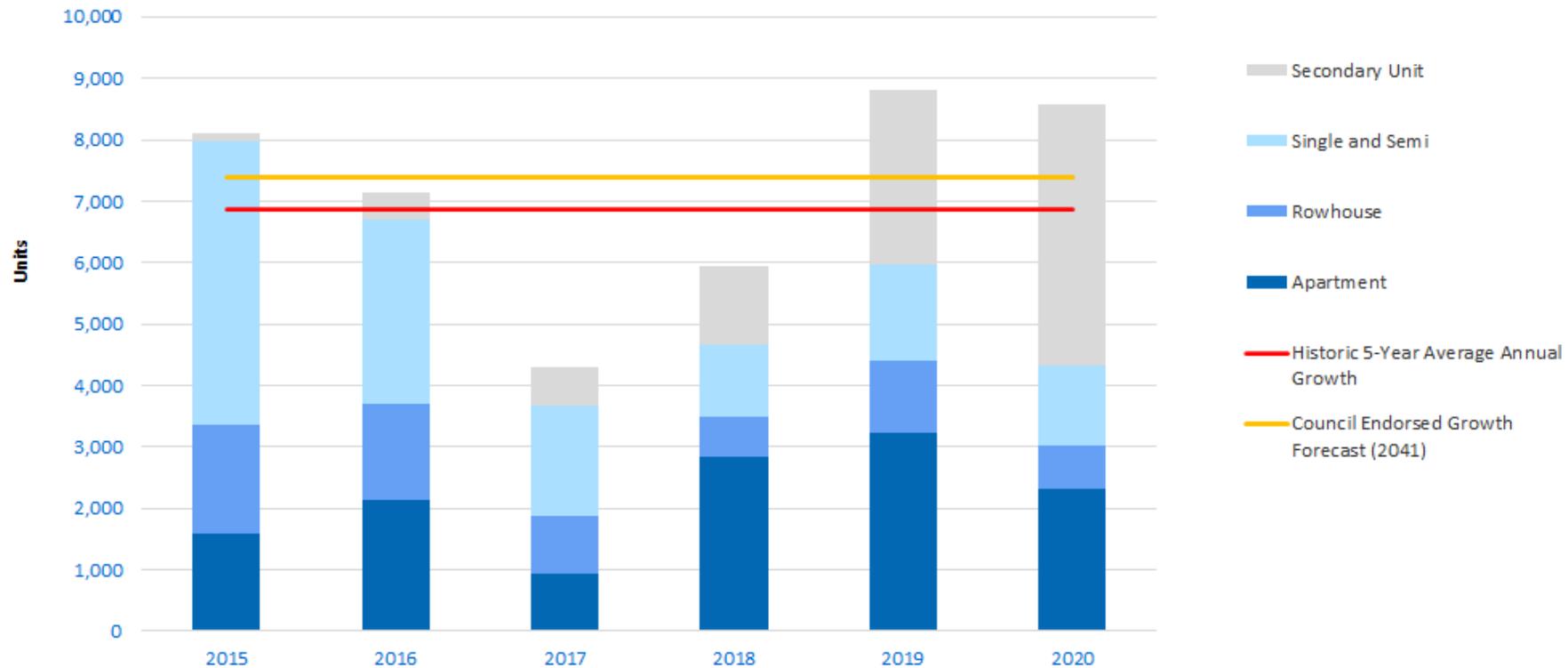


- As life expectancy rises, seniors are staying in the “family home” for longer, with a majority in apartments only for those 90 years of age and older
- Highest household growth in same age group as the highest preferences for ground-related housing
- While young adults have the highest preference for apartments, there is little growth in the age group



Residential Building Permit Activity

Peel Residential Units Issued Building Permits By Type

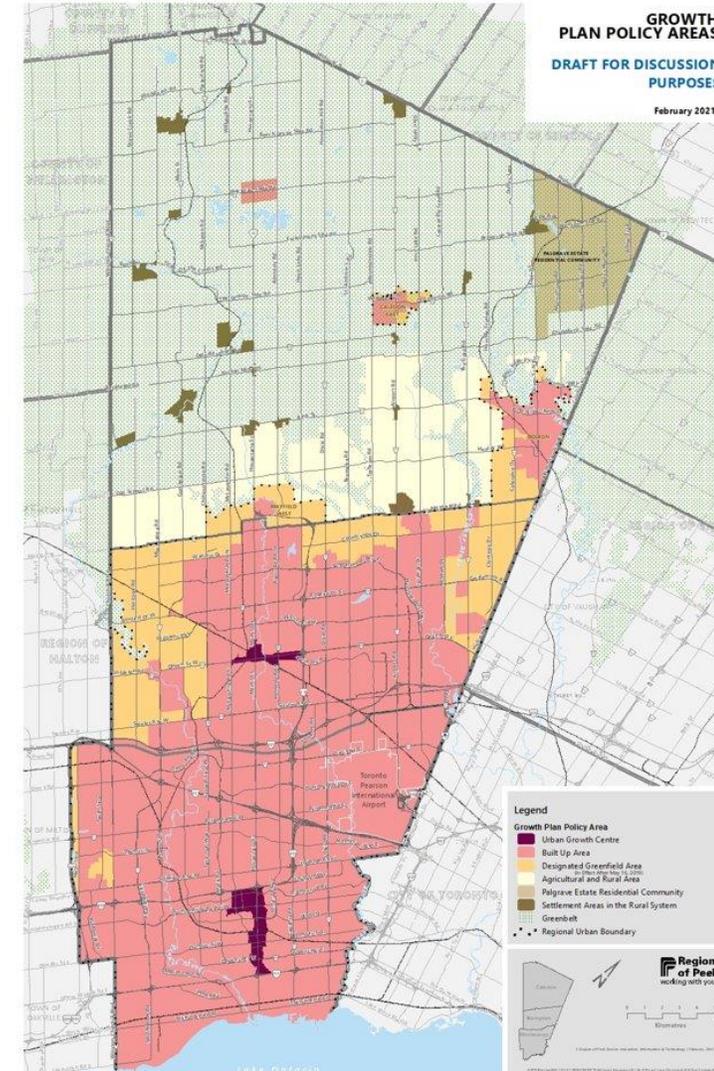


With the significant increase of second units in recent years, Peel has exceeded the Regional growth forecast in 2019 and 2020



Planning for Growth in Peel

- Delineated Built-up-area
- Urban Growth Centre
- Designated Greenfield Areas
- Rural Settlements
- Greenbelt





Built-up-Area

BRAMPTON
Built Up Area

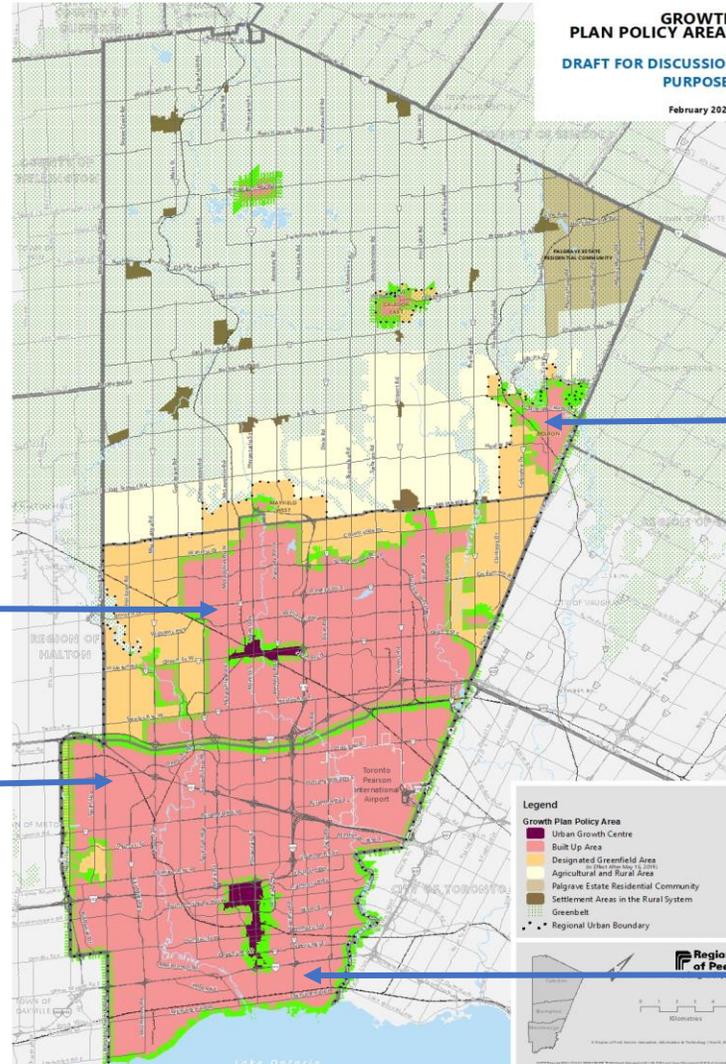


Fletchers West
58 r&j/ha(2021)
60 r&j/ha(2051)

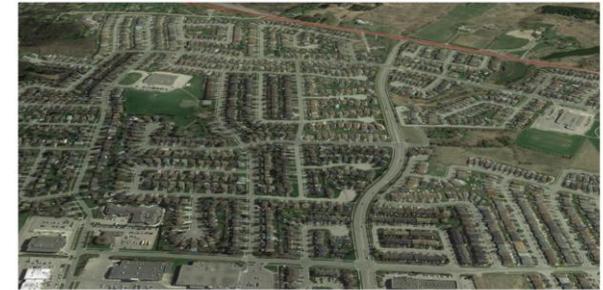
MISSISSAUGA
Built Up Area



Meadowvale CN
106 r&j/ha (2021)
162 r&j/ha (2051)

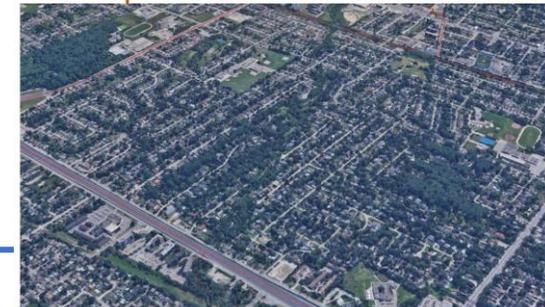


CALEDON
Built Up Area



Bolton
31 r&j/ha(2021)
39 r&j/ha(2051)

MISSISSAUGA
Built Up Area



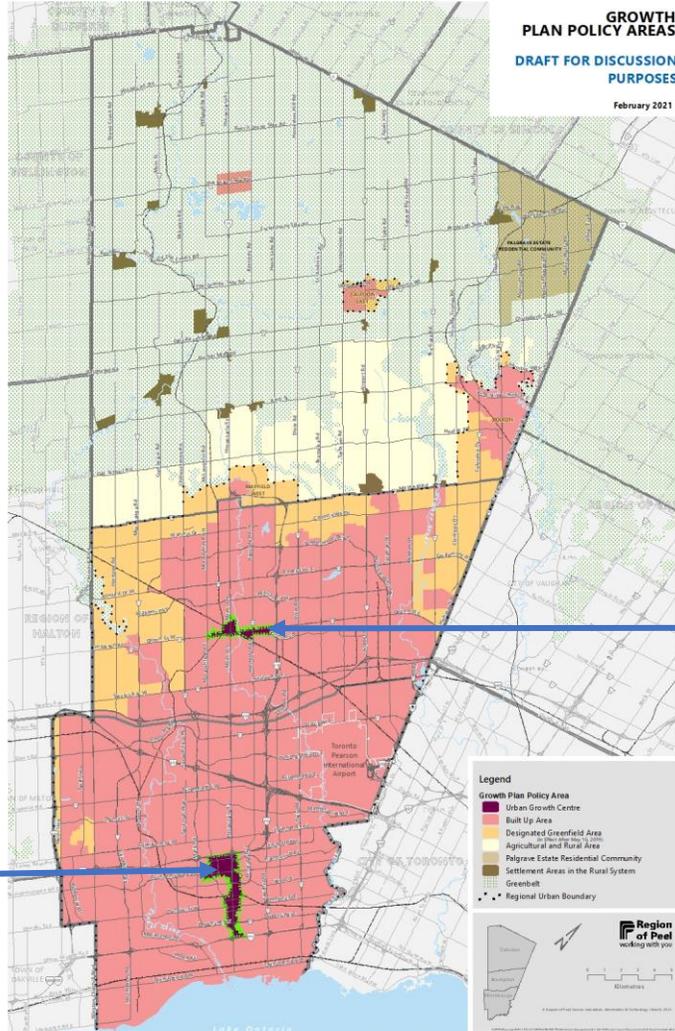
Mineola NHD
28 r&j/ha(2021)
30 r&j/ha(2051)



Urban Growth Centres

MISSISSAUGA Urban Growth Centres

238 r&j/ha(2021)
397 r&j/ha(2051)



BRAMPTON Urban Growth Centres

84 r&j/ha(2021)
313 r&j/ha(2051)





Designated Greenfield Areas

BRAMPTON
Greenfield Area Development

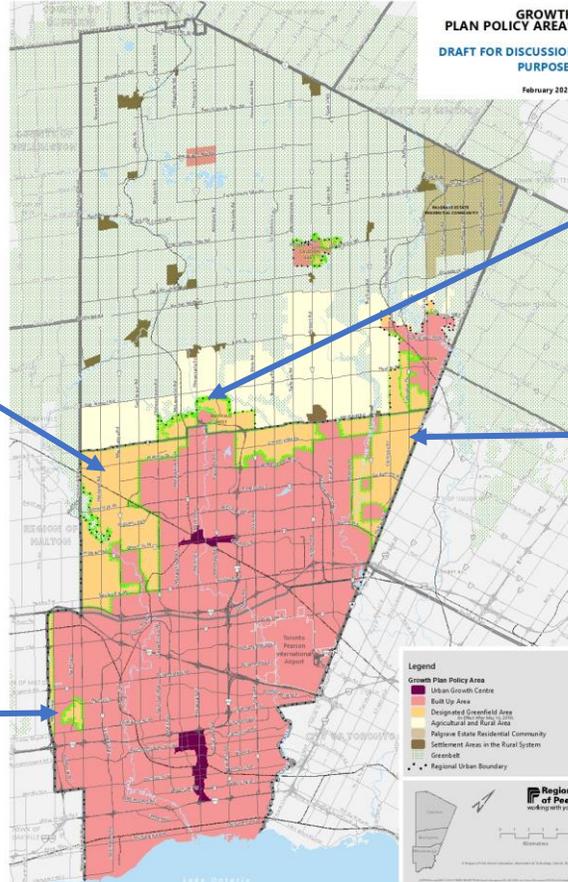


Mount Pleasant
37 r&j/ha(2021)
77 r&j/ha(2051)

MISSISSAUGA
Greenfield Area Development



Churchill Meadows NHD
81r&j/ha(2021)
80 r&j/ha(2051)



CALEDON
Greenfield Area Development

Mayfield West Phase 2
0 r&j/ha(2021)
77 r&j/ha(2051)



BRAMPTON
Greenfield Area Development

Bram East
59 r&j/ha(2021)
68 r&j/ha(2051)





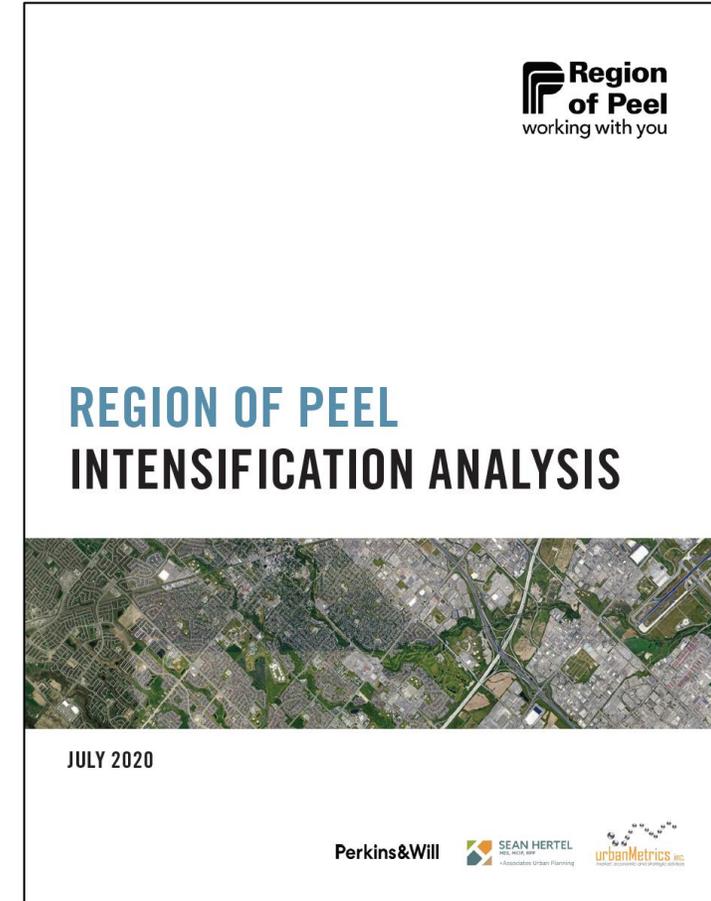
Intensification Analysis

Study Methodology

- **Historic Intensification**
- **Review Strategic Growth Areas and Major Transit Station Area Corridors**
- **Strategic Market Demand Assessment**
- **Key observations and Recommendations**

*2051 addendum underway

Perkins&Will





Intensification Analysis

Historic Intensification 2006-2018

- **43% Average annual intensification rate**
- **Most Intensification activity in downtown Mississauga and Brampton**
- **Apartment built forms in Mississauga community nodes**
- **Emerging intensification around transit nodes in Brampton**



Location



Timing



Typology

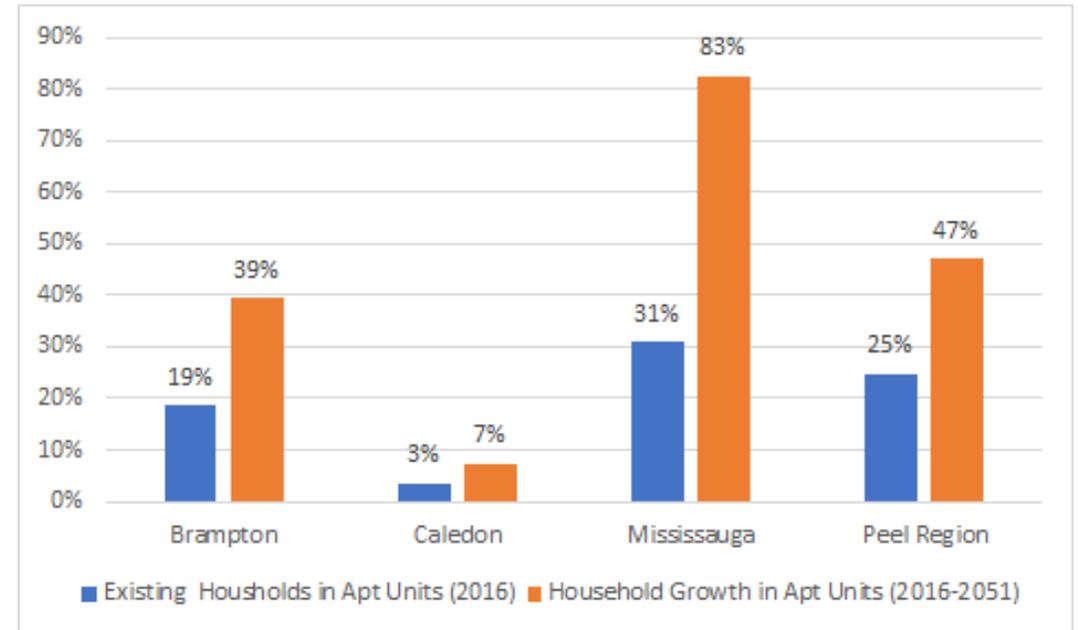


Intensification Analysis

Strategic Market Demand Assessment

- **A larger share of household growth to be accommodated in Apartments**
- **Strategic Growth Areas needed to accommodate intensification to 2051**
- **Access to amenities and transit in SGAs could influence demand**

Existing and Forecasted Households in Apartment Units 2016-2051



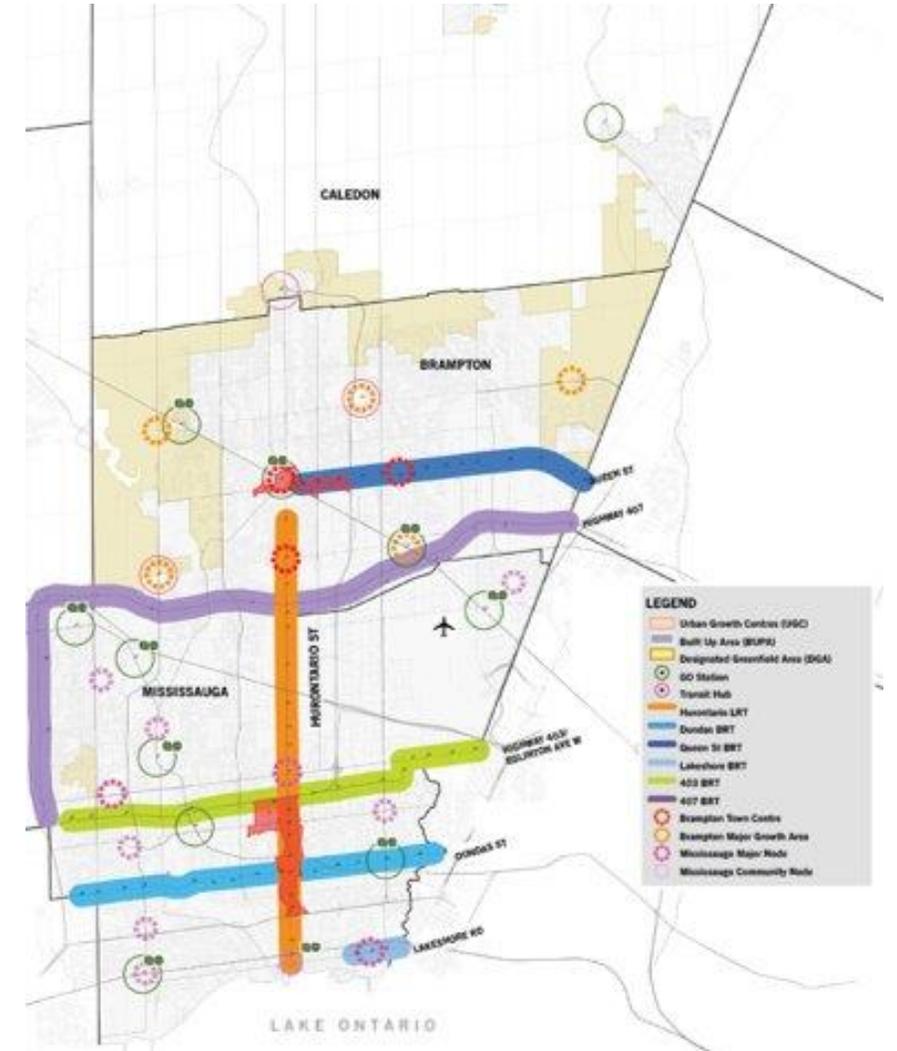


Intensification Analysis

Key Observations and Recommended Policy Implementation

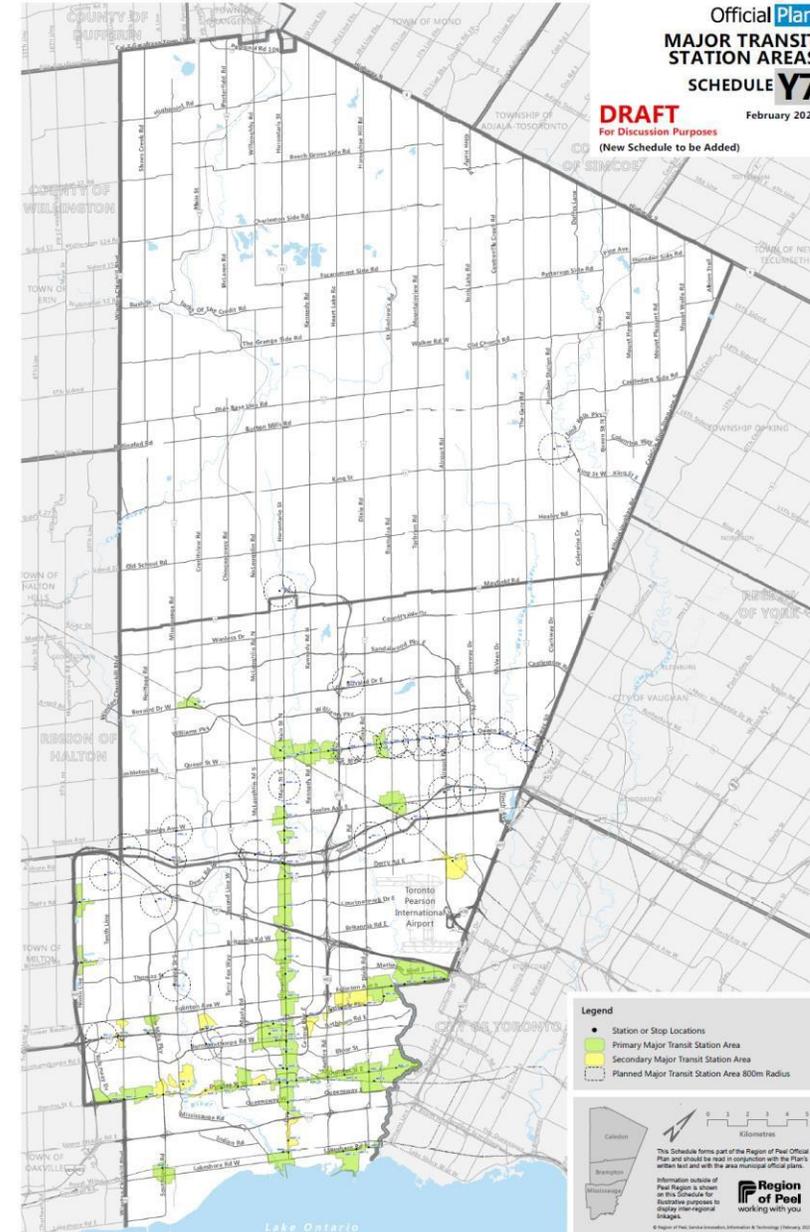
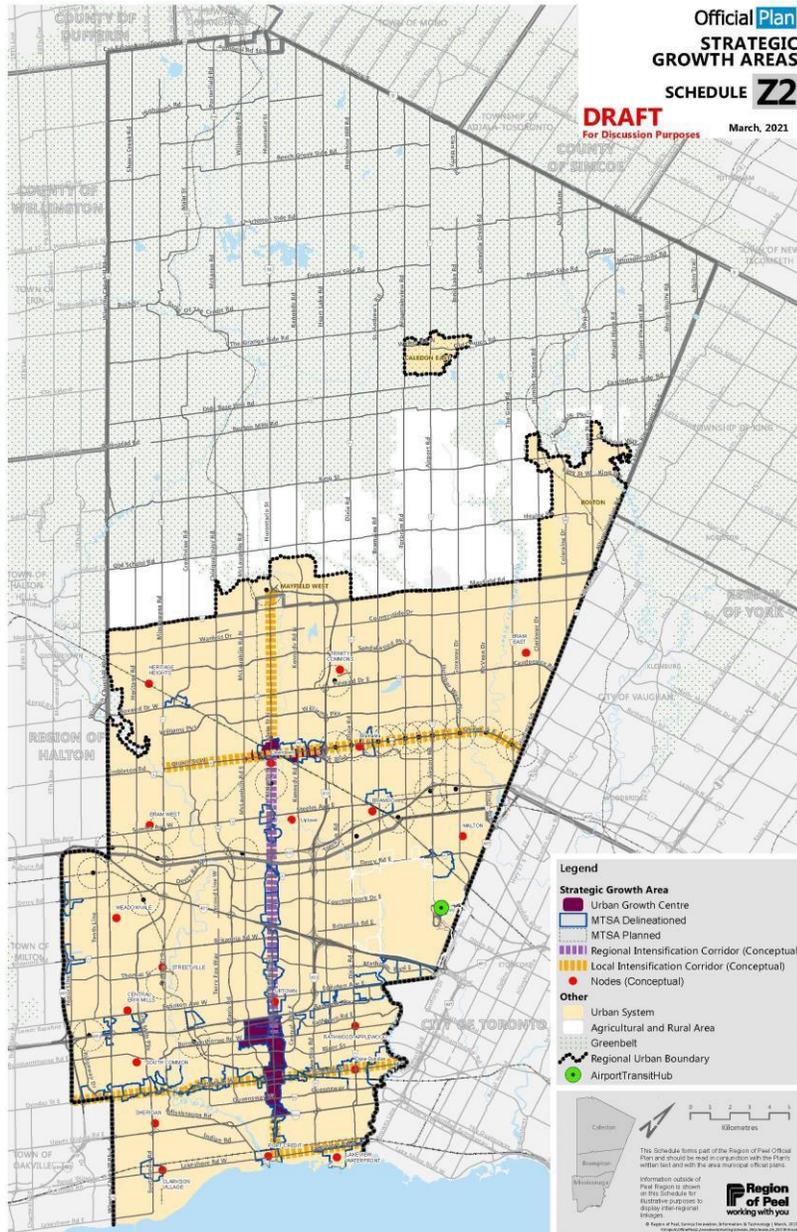
- **Urban Growth Centres to remain the focus of future growth**
- **Phased development hierarchy along key transit corridors**
- **GO stations at varying levels of ‘readiness’ based on existing context**
- **A new intensification hierarchy to build upon**

Strategic Growth Areas and Corridors





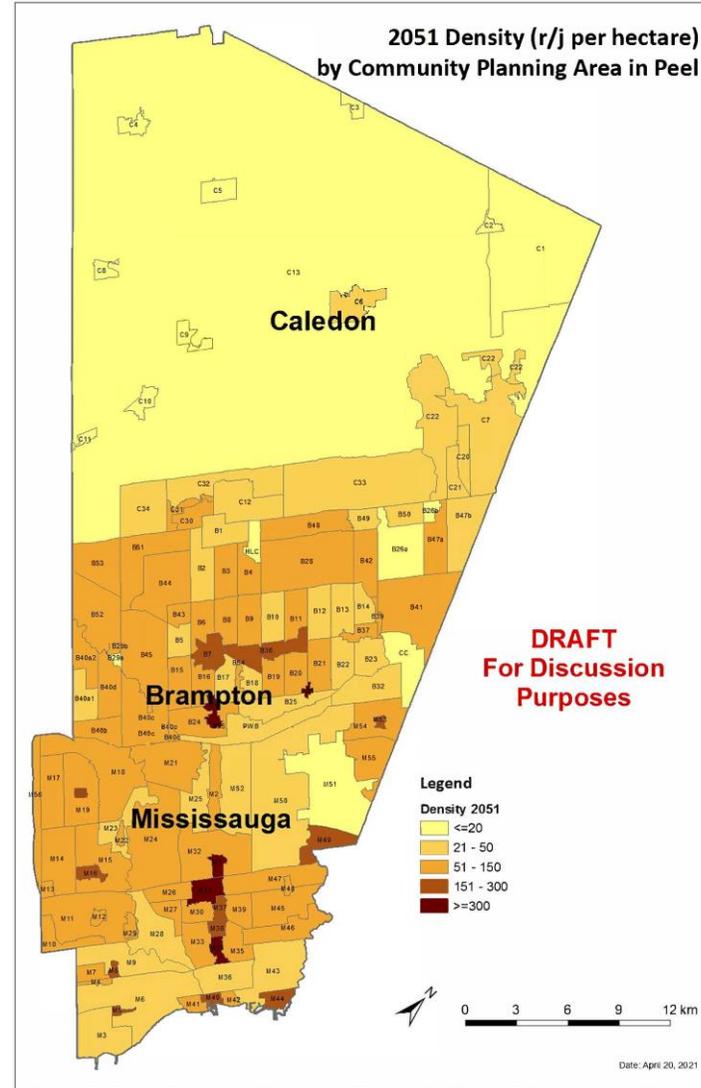
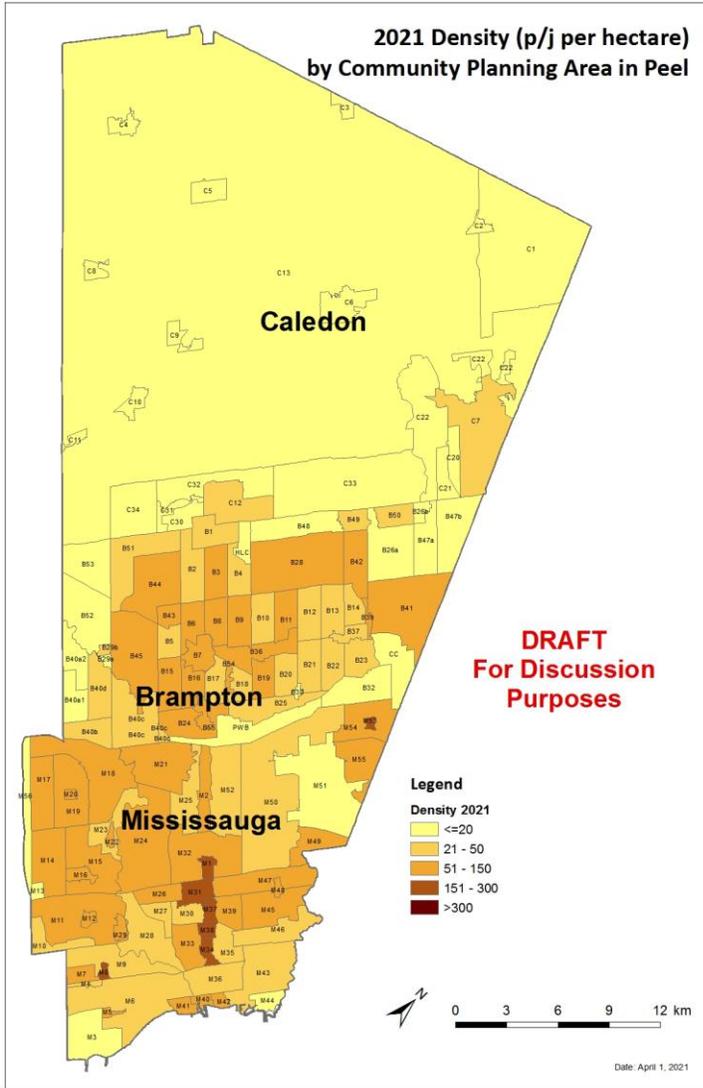
Strategic Growth Areas & Major Transit Station Areas





2021 Density v.s. 2051 Density

Key Growth Areas



Key Areas

- Mississauga UGC
- Brampton UGC
- Hurontario-Main Street Corridor
- Airport CC
- Lakeview
- Bramalea Go
- Port Credit
- Dundas Corridor
- Queen Street East



Strategic Growth Areas

BRAMPTON

Hurontario-Main Street Corridor
105 r&j/ha(2021)
332 r&j/ha(2051)



BRAMPTON

Bramalea City Centre
204 r&j/ha(2021)
351 r&j/ha(2051)



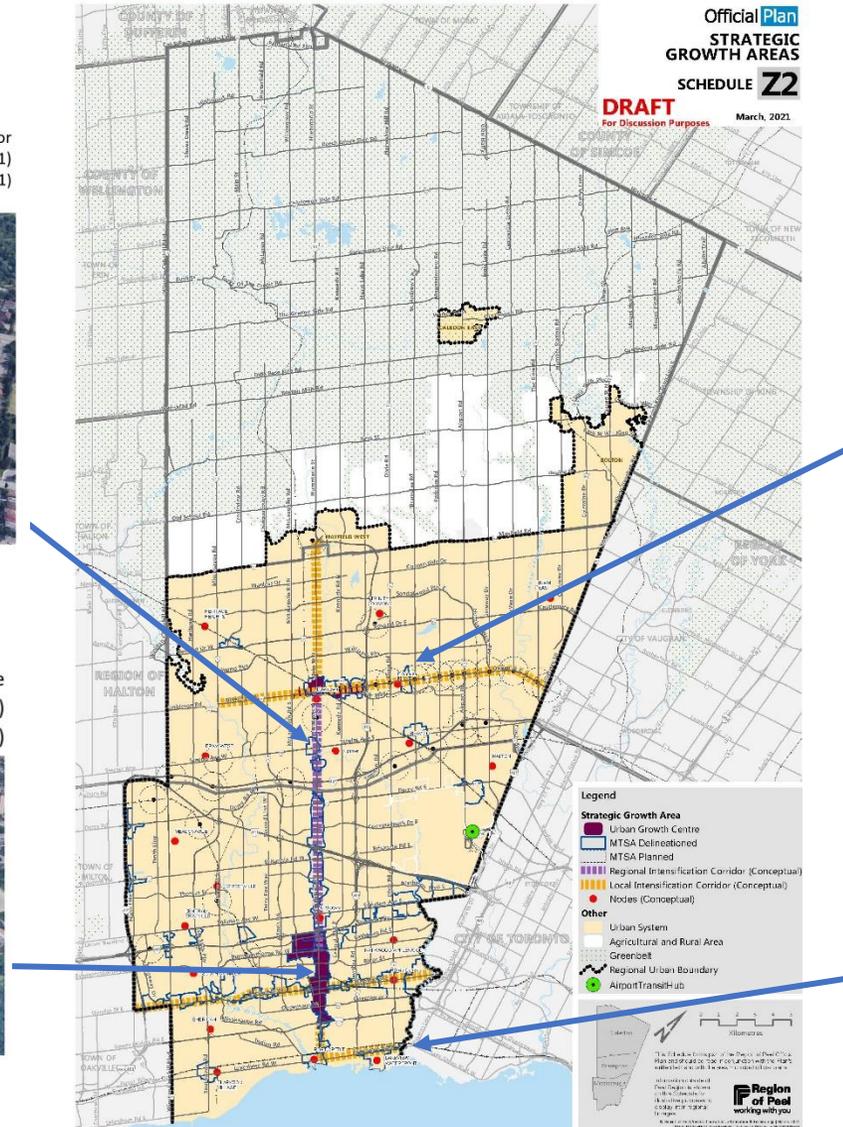
MISSISSAUGA

DT Cookville
164 r&j/ha(2021)
278 r&j/ha(2051)



MISSISSAUGA

Lakeview Waterfront MN
19 r&j/ha(2021)
160 r&j/ha(2051)





Community Area Land Need

529,000

**New Population
in existing areas**

173,000

**Additional Population
to be accommodated
through expansion**

3,000 hectares

**New Community Area
Land Need**

Planned Minimum Intensification Rate (2021-2051)

55%

Planned Minimum Designated Greenfield Area Density

65 p/j per ha

Ave Annual Population Growth Rate (2021-2051)

1.25%

Employment Land Need



2051 Employment Forecast

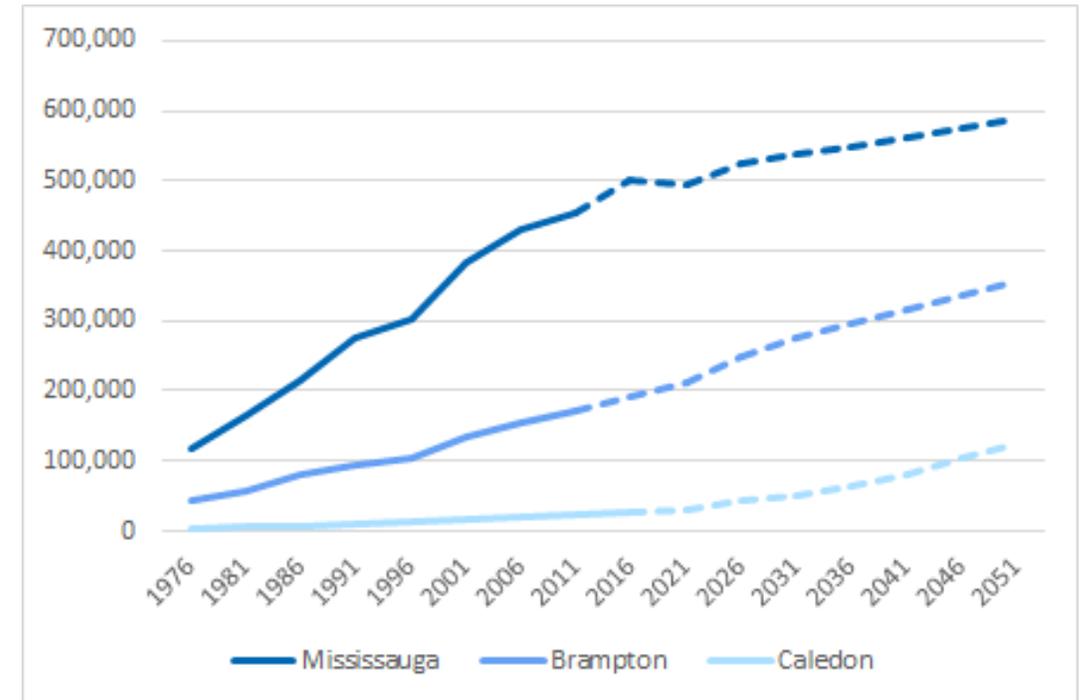
Employment Forecasts to 2051

Draft Municipal Allocation

	2021	New 2051
Municipality	Employment	Employment
Caledon	27,000	125,000
Brampton	209,000	355,000
Mississauga	500,000	590,000
Peel	736,000	1,070,000

The Region of Peel is forecasted to accommodate an additional 330,000 jobs by 2051

Peel Region Historical and Forecasted Employment Allocation





Employment Areas in Peel

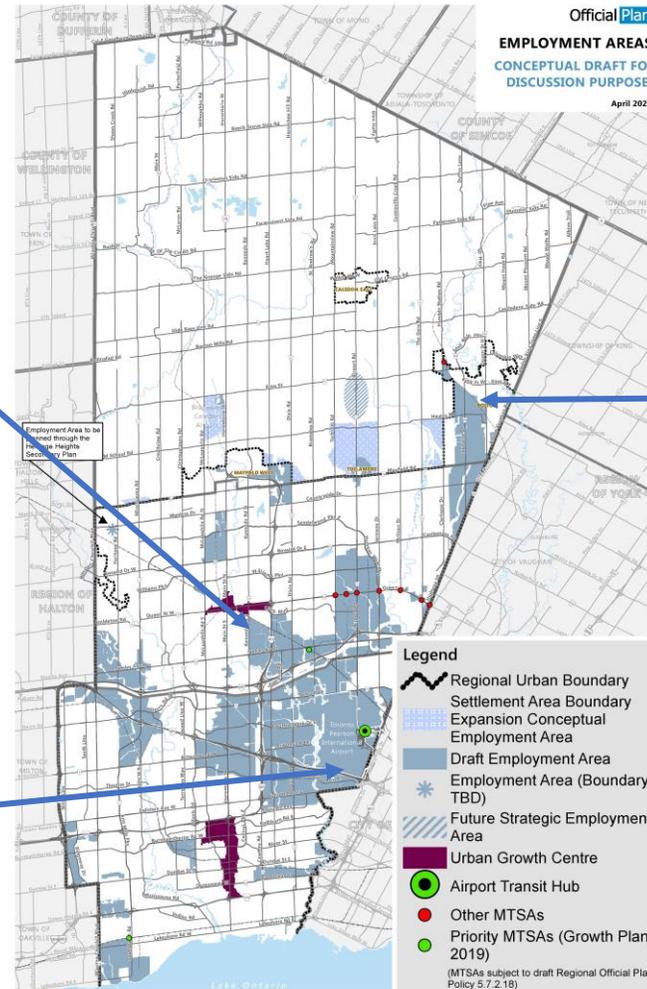
BRAMPTON Employment Land

Steeles Industrial
34 r&j/ha(2021)
41 r&j/ha(2051)



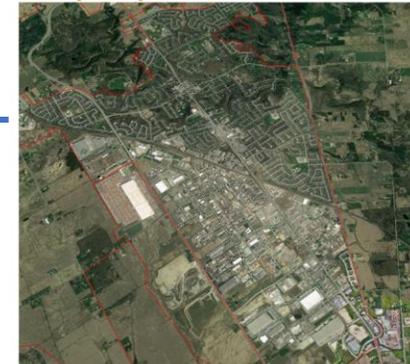
MISSISSAUGA Employment Land

Airport CC
118 r&j/ha(2021)
151 r&j/ha(2051)



CALEDON Employment Land

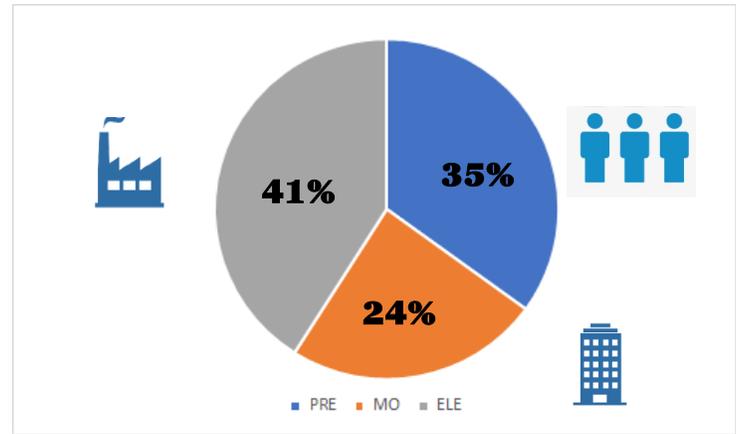
Bolton Employment Exp
12 r&j/ha(2021)
28 r&j/ha(2051)



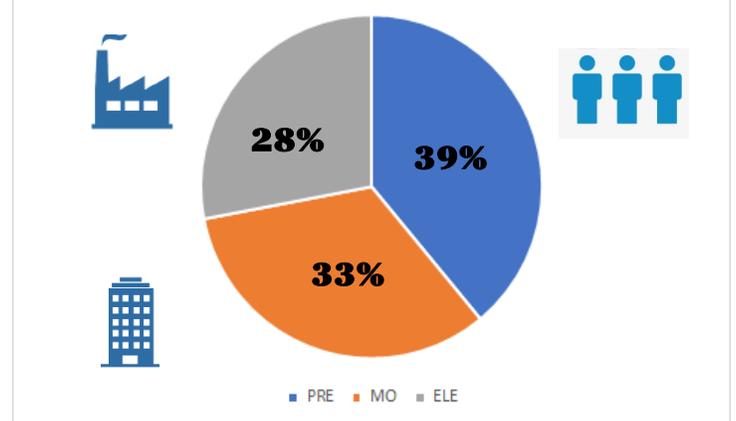


Employment Mix

Employment By Type (%) 2001-2021



New Growth Employment By Type (%) 2021-2051



Total Employment Mix (%) 2021

Population-related Employment



30%

Major Office Employment



19%

Employment land Employment



50%

Total Employment Mix (%) 2051

Population-related Employment



33%

Major Office Employment



23%

Employment land Employment

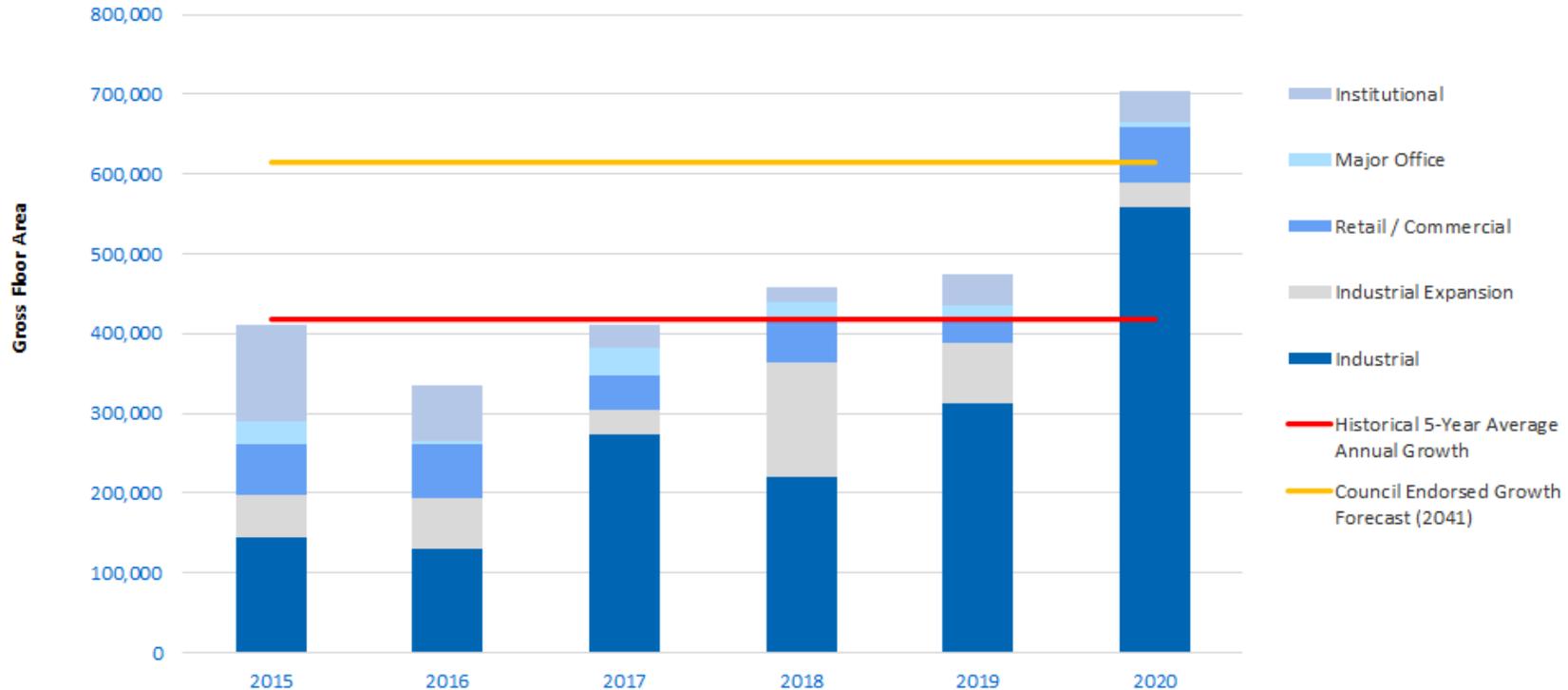


43%



Non-Residential Building Permit Activity

Peel Non-Residential Gross Floor Area Issued Building Permits By Type

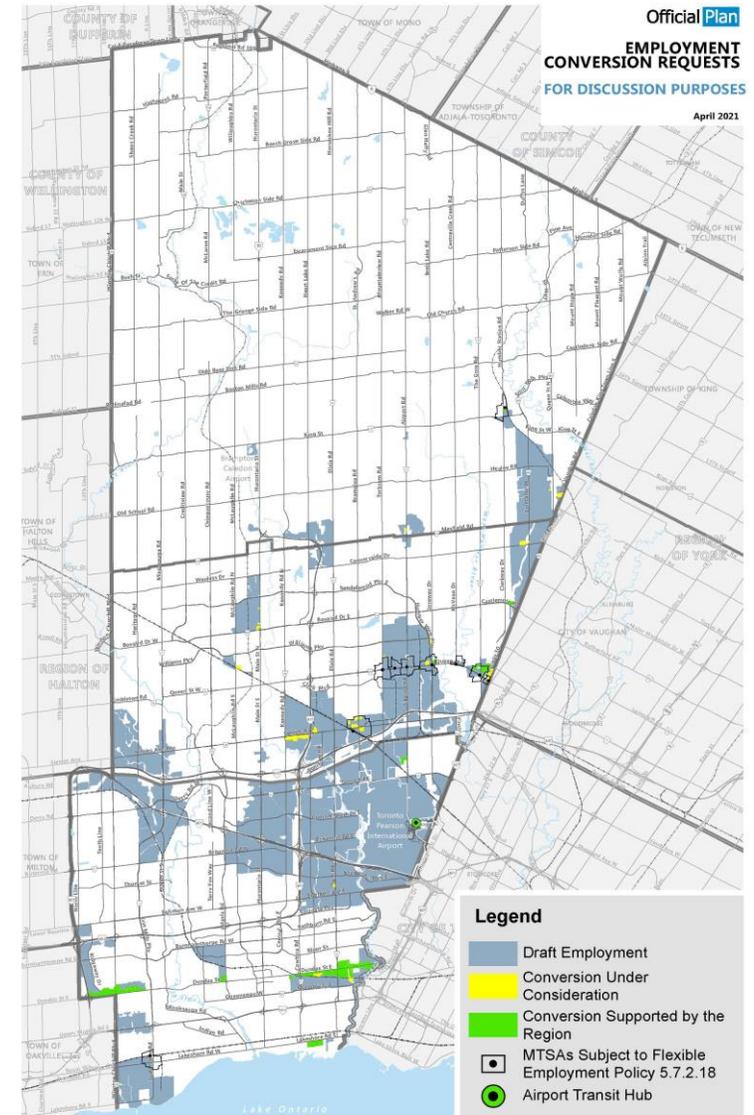


New industrial development has exceeded forecast projections in 2020, while office and retail commercial development have under performed



Employment Conversions

- **38 Conversion Requests Received**
- **371 hectares are being considered**
- **The Region considers requests based on:**
 - **Provincial and Regional policy criteria**
 - **Strategic planning justifications (e.g. major studies like Dundas Connects)**
- **Areas supported for conversion reduce the existing employment land base, and may increase the greenfield employment land need**





Employment Area Land Need

625,000

Jobs in existing
Employment
Areas

35,000

Additional Employment Area
jobs to be accommodated
through expansion

1,200 hectares

Employment Area Land
Need

Average Annual Employment Growth Rate (2021-2051)

1.3%

New Employment Area Density

29 jobs
per hectare



Key Findings

- **Significant new growth forecasted for Peel**
- **A shift to more higher density units required to support future growth**
- **Increased role for Strategic Growth Areas supported by transit and amenities**
- **Demonstrated need for additional land to accommodate forecasted housing and employment needs**
- **In 2020, the impacts of the COVID-19 pandemic on growth and development in Peel Region have not been as severe as first predicted.**



Next Steps

- **On-going collaboration with local municipalities and stakeholders**
- **Finalize addendums for supporting studies to 2051**
- **Update draft Land Needs Assessment**

Questions?