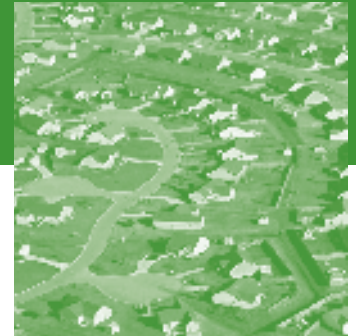


Sustainable Halton



Land Supply Analysis

November 2007



HEMSON
Consulting Ltd.

EXECUTIVE SUMMARY

The purpose of this report is to consider the range of urban land need that may be required to accommodate growth in Halton to 2031. Ranges of land need to 2031 are based on different scenarios of accommodating growth by varying density and by the portion of growth accommodated through intensification. The analysis, among other things, tests the need for new urban land in Halton that would need to be accommodated within the Primary Study Area(PSA)¹.

CONTEXT

The growth outlook for Halton Region, as required by the recently approved *Growth Plan* is the following:

Region of Halton Population and Employment Forecast (in 000s)						
	Population			Employment		
	Total	Growth	Compound Annual Growth Rate	Total	Growth	Compound Annual Growth Rate
1981	262	—	—	101	—	—
1986	280	18	1.3%	119	18	3.3%
1991	323	43	2.9%	141	22	3.5%
1996	349	26	1.6%	160	19	2.6%
2001	390	41	2.2%	189	29	3.4%
2006	457	67	3.2%	233	44	4.3%
2011	524	67	2.8%	279	46	3.7%
2016	588	64	2.3%	313	34	2.3%
2021	654	66	2.2%	339	26	1.6%
2026	718	64	1.9%	362	23	1.3%
2031	779	61	1.6%	386	24	1.3%

Note: Population is total population including Census undercoverage. The *Halton Official Plan* population figures are in Census population. In order to compare the two sources, the official plan population figures need to account for a 4% Census undercoverage.

Population and Housing Growth Summary

¹The PSA is the rural area of Halton located south and east of the principal Greenbelt area and that is not otherwise designated Urban in the Halton Region Official Plan. The PSA incorporates the Region's Greenlands system and the "fingers" of the Province's Greenbelt system within the area.

Meeting the *Growth Plan* population target of 780,000 would mean annual population growth of 2.2% over the next 25 years, slightly less than the 2.3% rate over the last 25 years. Population growth in the Region is accommodated through building additional housing units. To accommodate the population target assigned to Halton will require the addition of approximately 135,000 housing units between 2006 and 2031, an increase of 85% over the 160,000 units that existed in 2006.

Employment and Employment Land Growth Summary

Most of the employment growth in Halton will need to be accommodated on employment lands of the type found throughout the Region today, that is, business parks and employment areas predominantly occupied by single-storey industrial-type buildings. Employment growth over the next 25 years is forecast to occur at an average annual rate of 2.0%, significantly less than the 3.4% averaged over the last 25 years¹. An additional 2,300 net ha of developed employment land will be required to meet the growth targets, most of which can be accommodated in the existing designated lands in the Region, including major new areas in North Oakville and Milton.

FINDINGS

Most of the *employment land need* can be accommodated within the existing vacant employment land supply. After accounting for long-term vacancy and flexibility in the planned land supply an addition 600 gross hectares of employment land are currently estimated to be required beyond the existing urban boundary in new urban areas.

The *residential land need* is a more complex matter, as the need for new urban residential lands depends on the number of units provided through intensification with the existing built-up areas of Halton. Because most housing provided through intensification is medium and, especially, higher density types; the more growth planned to be accommodated through intensification, the greater the need to shift housing demand from lower to higher density units is needed. Achieving this shift in Halton Region would be a very significant challenge.

Several scenarios were prepared testing different levels of intensification and, therefore, ranges of housing mixes for new growth in the Region. Based on these residential scenarios and incorporating the employment land need, a preliminary range of total new urban land need beyond existing urban boundaries to accommodate growth targets to 2031 is 3,000 to 4,200 gross hectares.

¹Past rapid employment growth occurred in Halton as the Region moved from being a “bedroom” community to one with a significant employment concentration. Future employment is slower than the recent past in Halton (and across the GTAH and Ontario) as result of an aging population and slower labour force growth. A comparison of rapid past rates of growth with slower future rates should not in any way be interpreted as comment on Halton’s competitiveness for attracting employment growth.

The lower amount of new urban land at 3,000 gross ha is based on achieving the Province's target of accommodating 40% of new housing development within existing areas by 2015. The larger amounts of urban land are required if the Region is unable to shift housing demand sufficiently to achieve the 40% goal.

This range of urban land need represents a range of about 30% to 40% of the land that could conceivably be developed within the PSA, if the area were to be designated for urban uses.

Further detailed technical work is being undertaken on the land supply analysis, including the incorporation of the results of the other Sustainable Halton studies. Through this process the results described here will be refined, but will not change sufficiently to affect the fundamental findings described here.

OPTIONS

The key choices for the Region within the period to 2031 relate to the degree to which new housing development is accommodated within the built-up area and how to achieve necessary changes in the types of housing built in the Region. The rules in the *Growth Plan*, as stated, would require the Region to achieve the scenario requiring the greatest intensification and the greatest change in housing type, but requiring the least amount of new urban land. Through the Sustainable Halton process options will be explored with the Province to achieve the intent of the *Growth Plan* while better integrating with the Region's planned urban structure and its own planning goals.

TABLE OF CONTENTS

EXECUTIVE SUMMARY.....i

I INTRODUCTION.....1

II GROWTH OUTLOOK FOR HALTON BASED ON PROVINCIAL GROWTH LAND3

3

A. Detailed Population, Employment and Household Forecasts Required to Analyse Future Land Needs.....4

B. Detailed Employment Data Also Required to Analyse Future Land Needs.....6

III LAND SUPPLY AVAILABLE UNDER EXISTING REGIONAL AND LOCAL OFFICIAL PLANS.....9

A. Majority of Region’s Residential Land Supply Is Subject to Committed Secondary Plans.....9

B. Residential Land Supply Does Not Yet Include Forthcoming Analysis of Intensification Potential.....11

C. Half of the Regional Employment Land Supply Is Occupied.....13

IV FUTURE RESIDENTIAL LAND NEEDS BASED ON A RANGE OF INTENSIFICATION ASSUMPTIONS.....15

V RANGE OF NEW URBAN LAND NEED INCLUDES RESIDENTIAL, EMPLOYMENT AND OTHER URBAN USES.....26

A. Additional Residential Land Needed to Accommodate Growth to 2031 Is in the Range of 1,800 to 2,800 Gross Hectares.....26

B. Forecast Employment Land Indicates Minimum Requirement in the Region of 600 Gross Hectares.....29

C. Total Urban Land Need to 2031 Would Be in the Range of 3,000 to 4,200 Gross ha of Urban Land in the Primary Study Area.....32

VI OPTIONS FOR SUSTAINABLE HALTON34

APPENDIX: REGIONAL RESIDENTIAL SUPPLY BY LOCAL MUNICIPALITY.....35

I INTRODUCTION

In June of 2006 the Province of Ontario released the *Growth Plan for the Greater Golden Horseshoe*. The document, *Places to Grow — Better Choices, Brighter Future*, provides a framework for implementing the Provincial vision for managing growth in the Greater Golden Horseshoe (GGH) to 2031. The *Growth Plan* sets out Provincial interests and directions on many issues including: the distribution of population and employment growth; where and how that growth will be accommodated; infrastructure requirements; and the protection of key heritage and natural resources.

Municipal official plans are required to conform to the *Growth Plan* within three years of its final release, as stipulated in both the *Greenbelt Act (2005)* and the *Places to Grow Act (2005)*. In response, the Region of Halton has initiated *The Sustainable Halton Plan*. Building upon the updated *Regional Official Plan*, *Sustainable Halton* is to be Halton's long-term growth management strategy to address the forecast growth in the Region — a near-doubling of existing population and employment by 2031.

This report is one of a series that are being prepared as part of *Sustainable Halton*, in order to conform to the Provincial *Growth Plan* and *Provincial Policy Statements* and also to meet current *Regional Official Plan* directions. The report considers the range of urban residential and employment land that may be required to accommodate growth to 2031. The range of residential land need to 2031 is based on different scenarios for accommodating growth by varying density and the portion of growth accommodated through intensification. The range of employment land need to 2031 is based on a comparison of future demand to the currently designated land supply.

The process of determining future land needs can be complex, especially given the new *Growth Plan* rules affecting the accommodation of residential and employment development. Following this introduction, the remainder of the report is organized into five sections following a step-by-step process to reach our conclusions, as follows:

1. Growth for Halton Based on Provincial *Growth Plan*

The population, employment and housing growth forecasts to 2031 are described, based on the Province's *Growth Plan* and related documents.

2. Land Supply Available Under Existing Regional and Local Official Plans

The land supply within the existing designated urban areas of Halton is estimated, expressed in terms of housing units and employment land areas.

3. Future Regional Land Needs Based on a Range of Intensification

Assumptions

The supply and demand for residential land is compared, considering different scenarios to address *Growth Plan* rules, to determine new urban residential land requirements.

4. Range of Total New Urban Land Need Includes Residential, Employment and Other Urban Uses

To accommodate growth to 2031, the land need for new urban areas includes residential land, employment land as well as other urban uses. The supply and demand for employment land is compared, to determine new employment lands needs. Employment and residential land need, in addition to other urban uses, are then combined to provide a range of total urban land that is required to 2031 in the Region of Halton.

5. Options for Sustainable Halton

Finally, options are reviewed concerning how to implement the application rules of the *Growth Plan* and options for long-term development.

The conclusions presented in this report are based on information available at the time of writing. The land supply information is likely to be revised in the coming year as detailed work is undertaken on intensification potential by the local municipalities and the Region. In addition, the 2006 Census data will start to be released in the coming months. While estimating methods used for 2006 data are sound, they will, inevitably, vary from the actual results.

As a result, the analysis presented in this report should be considered preliminary and subject to later updating and revisions throughout the Sustainable Halton process. *However, at this point there is no reasonable expectation that these revisions would be sufficient to affect the key choices and options being considered at this time in the Sustainable Halton process.*

II GROWTH OUTLOOK FOR HALTON BASED ON PROVINCIAL GROWTH PLAN

The starting point for considering future land needs in Halton Region is the *Growth Plan* forecasts for population and employment to 2031. Under the *Places to Grow Act*, the Region is required to plan for this level of growth.

Schedule 3 of the *Growth Plan* provides population and employment forecasts for the Region of Halton and the other regions and single-tier cities of the Greater Toronto Area and Hamilton (GTAH). The Schedule 3 growth forecast for the GTAH is shown in Table 1.

	Population				Employment			
	2001	2011	2021	2031	2001	2011	2021	2031
Region of Durham	530	660	810	960	190	260	310	350
Region of York	760	1,060	1,300	1,500	390	590	700	780
City of Toronto	2,590	2,760	2,930	3,080	1,440	1,540	1,600	1,640
Region of Peel	1,030	1,320	1,490	1,640	530	730	820	870
Region of Halton	390	520	650	780	190	280	340	390
City of Hamilton	510	540	590	660	210	230	270	300
GTAH Total	5,810	6,860	7,770	8,620	2,950	3,630	4,040	4,330

Source: Growth Plan for the Greater Golden Horseshoe, 2006

Note: These figures are total population including Census Undercoverage, unlike Halton Official Plan population which are Census based and do not include undercoverage.

The table indicates a doubling of population and employment between 2001 and 2031 in the Regions of Halton and York. These regions are forecast to be the fastest growing among the six areas within the GTAH. Among many other factors, this growth distribution is related to geographic location (Durham and Hamilton are less central) and the availability of potential development land (Toronto is fully developed and southern Peel is nearing full development).

These forecasts are based on extensive research undertaken for a committee that included representatives of the Region of Halton, the other three region and two single-tier cities in the GTAH, the Ministry of Public Infrastructure Renewal (MPIR) and the Ministry of Municipal Affairs and Housing. Representatives of some municipalities in the "Outer Ring" (the area of the GGH beyond the GTAH from

Niagara through Waterloo and Simcoe around to Northumberland County) were also involved. The forecasts and background research were documented in the *Growth Outlook for the Greater Golden Horseshoe*, published in January 2005.

In the almost two-year process of preparing the forecasts, the committee considered a wide range of influences on the growth outlook including economic and demographic factors as well policies and market conditions affect planning and development. Those readers interested in gaining a better understanding of what underlies the forecasts are encouraged to review the background report. The *Growth Outlook for the Greater Golden Horseshoe* is available at the following direct web link: www.hemson.com/news/04.html. The MPIR website also links to this location.

A. DETAILED POPULATION, EMPLOYMENT AND HOUSEHOLD FORECASTS REQUIRED TO ANALYSE FUTURE LAND NEEDS

While the *Growth Plan* provides the legally required population and employment forecast numbers, more detailed statistics are required to undertake the land supply and future land need analysis for Halton. The forecast modelling that underlies the figures in the *Growth Plan* provides us with this additional information.

Table 2 provides the population and employment outlooks for Halton Region in five year intervals, rounded to the nearest 1,000. A closer examination of these data allows one to draw a number of important conclusions for the consideration of growth in the Sustainable Halton process:

- While the *Growth Plan* chart indicates a doubling of the Regional population between 2001 and 2031; from the perspective of today, a portion of this growth has already occurred. Comparing the next 25 years to the past 25 years, the forecasts indicate growth from 2006 to 2031 of about 70% in population, slightly less than the 74% growth that Halton experienced over the past 25 years.
- Over the entire 50 years shown in the chart, the current decade (2001 to 2011) is expected to show the highest growth rate of both population and employment. The slowing rate of growth over the next 25 years mirrors the GGH-wide pattern, where even high immigration levels cannot compensate for the effects of an aging population with low fertility rates producing slow growth and the retiring baby boomers limiting the potential for labour force growth.
- For Halton, one of the key matters revealed in this table is how “front-end loaded” the employment growth is expected to be. The long-term employment and economic base and the economic development and planning decisions needed to support the long-term vision will primarily be established within the next 10 years.

	Population			Employment		
	Total (000s)	Growth (000s)	Compound Annual Growth Rate	Total (000s)	Growth (000s)	Compound Annual Growth Rate
1981	262	—	—	101	—	—
1986	280	18	1.3%	119	18	3.3%
1991	323	43	2.9%	141	22	3.5%
1996	349	26	1.6%	160	19	2.6%
2001	390	41	2.2%	189	29	3.4%
2006	457	67	3.2%	233	44	4.3%
2011	524	67	2.8%	279	46	3.7%
2016	588	64	2.3%	313	34	2.3%
2021	654	66	2.2%	339	26	1.6%
2026	718	64	1.9%	362	23	1.3%
2031	779	61	1.6%	386	24	1.3%

Note: Population is total population including Census undercoverage. The *Halton Official Plan* population figures are in Census population. In order to compare the two sources, the official plan population figures need to have a 4% Census under coverage added.

The Sustainable Halton process, and particularly the task at hand, is focussed on the relationship of this population growth to the land base and the long-term development of the Region. For residential growth, the link between land and population is housing. The outlook for growth in households, prepared as part of the GGH population forecasts, is shown in Table 3.

In comparing the growth rates in households to the growth rates in population, it is clear that both historically and in the forecast households grow at a faster rate than population. This is the result of declines in the average household size, itself a result of an aging population and a low fertility rate. The implication for planning and development is that to house the same population today in Halton would require about 10% more housing units than would have been required in 1981. Likewise about 10% more units will be required to house the equivalent of today's population in 2031.

Table 3 Region of Halton Household Forecast				
	Total Household s (000s)	Growth		Average Household Size
		(in 000s)	Annual Rate	
1981	82	—	—	3.20
1986	90	8	1.9%	3.11
1991	106	16	3.3%	3.05
1996	118	12	2.2%	2.96
2001	134	16	2.6%	2.91
2006	160	26	3.6%	2.86
2011	187	27	3.2%	2.80
2016	215	28	2.8%	2.73
2021	243	28	2.5%	2.69
2026	270	27	2.1%	2.66
2031	296	26	1.9%	2.63
Total 2006– 2031	—	135	2.5%	—

Source: *Growth Outlook for the Greater Golden Horseshoe*, Hemson Consulting Ltd, 2005

To accommodate the population target assigned to the Region, Halton will require the addition of approximately 135,000 new housing units between 2006 and 2031, an increase of 85% over the 160,000 units that existed in 2006.

B. DETAILED EMPLOYMENT DATA ALSO REQUIRED TO ANALYSE FUTURE LAND NEEDS

In order to consider how to accommodate the forecast employment growth of almost 160,000 jobs over the next 25 years to 2031, it is important to consider the type of employment that will need to be accommodated. The following table distributes the regional employment growth into three major land-use types — major office, population related and employment land employment.

These three land-use-based categories are defined specifically by their characteristic type of land occupied and type of land needed to accommodate growth. Overall the employment forecast is based on a number of economic assumptions regarding the existing and future sectoral structure of the economy. These are addressed in some detail in the *Growth Outlook for the Greater Golden Horseshoe*. For summary purposes in this report, the three major employment categories are as follows.

- **Major Office:** Major office is defined as employment occurring in free-standing office buildings of 20,000 sq.ft. or greater. By their nature they are quite dense

(it terms of employment per ha), so little land is required to accommodate growth in this sector.

- **Population Related Employment:** Is defined as employment which provides services to a resident population or arises strictly in response to residential development. This category includes retail, services, local government, schools, medical services and other institutional establishments. It also includes those that work from home. Most of the new land need associated with growth in this category is provided in the course of normal secondary planning.
- **Employment Land Employment:** Is the range of employment uses in industrial-type buildings, typically concentrated in business parks and other designated employment areas. In urban communities (except central cities such as Toronto), this category is typically the largest segment of employment. This category is also the most land extensive requiring specific planning to provide sufficient well-located lands to meet market needs.

The employment growth forecast to 2031 is shown in Table 4. The table shows 2005 as the base year to provide consistency with similar information provided in the Region's Economic Strategy (2006) and to be comparable to the land supply analysis that also adopts 2005 base.

	Employment Land Employment	Major Office Employment	Population Related Employment	Total
2005	137,000	22,000	67,000	226,000
2031	218,000	51,000	116,000	386,000
Growth 2006–31	81,000	29,000	49,000	159,000

Source: Hemson Consulting Ltd, *Growth Outlook for the Greater Golden Horseshoe*

Notes: Totals may not add due to rounding.

2005 employment estimate is used as the most recent employment land supply estimates are year-end 2005. Estimate is based on the 2001 base data and 2006 forecast.

To accommodate the employment target assigned to the Region, Halton will require the addition of approximately 81,000 jobs in business park and employment areas as well about 78,000 jobs in office and population related employment in locations across the Region.

The Region of Halton will require the addition of approximately 135,000 new housing units between 2006 and 2031, an increase of 85% over the 160,000 units that existed in 2006. Halton will also need to accommodate nearly 160,000 new jobs, the largest share of which will be employment land employment, the most land extensive of the three types and one that requires specific planning to provide sufficient well-located land areas.

In the next chapter, we turn to a discussion of the supply of land that is available to accommodate future residential and employment growth, before proceeding to a comparison of demand and supply and the reaching of conclusions on future urban land needs.

III LAND SUPPLY AVAILABLE UNDER EXISTING REGIONAL AND LOCAL OFFICIAL PLANS

The land supply analysis for Sustainable Halton is currently based on extensive information compiled in 2006 and described in two reports:

- *Urban Land Supply: 2006 Update to Regional Supply in Adequacy of Land Supply in Halton Region, 2002* — The background 2006 Regional land supply report was prepared as evidence for the Regional Official Plan Amendment 25 (ROPA 25) Ontario Municipal Board hearing. This report provides the basis for the Region's supply of residential land; and
- *Comprehensive Economic Development Strategy* — The report was prepared in 2006 as a guide to understanding the Regional economy and taking action to meet desired goals and objectives. The strategies background reports provide the Region's supply of employment land (which was the same information used for the employment land analysis in the ROPA 25 hearing).

This chapter provides a summary of the residential and employment land supply. For more detailed information the reader is encouraged to consult the original documents, which are available at the Region. Following the description of the residential land supply information that is used in this current analysis, a description will be provided of the anticipated supply changes that will result from further local municipal and Regional intensification work. The section concludes with a description of the employment land supply.

A. MAJORITY OF REGION'S RESIDENTIAL LAND SUPPLY IS SUBJECT TO COMMITTED SECONDARY PLANS

The residential land supply is based on evidence prepared for the Ontario Municipal Board ROPA 25 hearing in 2006. The report, *Urban Land Supply: 2006 Update to Regional Supply in Adequacy of Land Supply in Halton Region, 2002* was an attachment to the reply witness statement of Russell Mathew, March 28, 2006. For residential land the witness statements primarily addressed the question of whether the designated land supply in Halton Region were sufficient to provide for planned growth to 2021.

In order to provide the necessary information to determine the adequacy of existing lands to accommodate growth and to determine additional land requirements beyond the existing urban boundaries, the supply of residential land is measured in the potential housing units by type. Supply is expressed in terms of potential housing units that could be built from year-end 2005.¹ It is made up of five components.

¹ In areas under current development, units are considered built (versus vacant supply) based on issuance of building permits. Because of construction timing of about six months for houses, the year

1. **Estimated 2005 Existing Units** — Compiled through 2001 census data, CMHC completions data and units under construction.
2. **Vacant Supply** — Residential development applications registered, draft approved and applications received or under review. This information is provided by local municipalities and the Region.
3. **Other Vacant** — Vacant residential lands within designated secondary plan areas. This includes the second and third Phases of the Milton HUSP area and North Oakville.
4. **Identified Intensification** — Numbers compiled by local municipalities on a site-by-site basis, based on local assumptions of redevelopment within the downtown areas and along major corridors, as well as infill in other areas.
5. **Additional Infill and Rural** — In preparing the analysis, a small amount of additional potential is added to each municipality to account for intensification at locations that would not now be identified as potential. It is also to account for future scattered or rural development that might occur over the planning period.

Since the ROPA 25 work was undertaken there have been some small revisions to the data to update to the current supply estimates in Oakville:

- Unit yields from the North Oakville Secondary Plan area have been adjusted to reflect the anticipated number and type of units resulting from the most recent version of the plan subject to the OMB settlement agreement between the Town of Oakville, Region of Halton and most of the appellants.
- At the request of the Town, the number of units considered within the “additional infill” category was reduced for the current analysis, pending the outcome of the Town’s intensification study, currently under way.

The land supply estimates were compiled for each local municipality in Halton Region. The residential supply estimates for each of the local municipality are provided in Appendix A. Prior to the completion of this analysis these supplies were reviewed with staff in each municipality. The results are shown in Table 5. The total

end 2005 data is equivalent to build and occupied units as of mid-year 2006. For the purposes of forecasting occupied housing units and the population within the completed units, the mid-year 2006 occupancy approximates Census Day 2006.

residential supply in the Region of Halton, within the designated urban areas, is 256,000 units. This is made up of 160,000 existing units and nearly 96,000 future potential units.

Table 5 Detailed Residential Supply, Region of Halton Total Year-End 2005						
	Estimated 2005 Existing Units	Vacant Supply (registered, Draft Approved & Applications)	Other Vacant Land (no appln.)	Intensification		Vacant Potential
				Identified	Additional Infill & Rural	
Singles & Semis	107,790	17,090	26,230	1,140	890	45,350
Rows	23,790	6,850	11,340	5,000	0	23,190
Apartments	28,900	6,050	8,710	9,760	2,450	26,970
Total	160,480	29,990	46,270	15,910	3,350	95,510

Source: Background Report to Russell Mathew witness statement for ROPA 25 hearing, *Urban Land Supply: 2006 Update to Regional Supply in Adequacy of Land Supply in Halton Region, 2002*, March 2006

Note: Totals may not add due to rounding.

It should be noted in this supply analysis that the development potential in the greenfield areas ("Vacant Supply" and "Other Vacant Lands") has a full range of housing mix including low, medium and higher density units. This is not surprising given that most new communities have been planned to accommodate a range of housing types. The vast majority of the unit potential on these vacant lands is within North Oakville and the Milton Halton HUSP areas.

Intensification, on the other hand, is predominantly apartment units, with some medium density potential and little lower density potential. This is a typical pattern because of the nature of redevelopment economics and that most redevelopment and infill occurs on sites in downtowns and along major roads that are suited to medium and higher density development. Most of Halton's intensification potential is located within the larger older communities of Burlington and Oakville.

B. RESIDENTIAL LAND SUPPLY DOES NOT YET INCLUDE FORTHCOMING ANALYSIS OF INTENSIFICATION POTENTIAL

As noted in the introduction, the estimate of residential land supply should be considered, in part, to be preliminary given that further work is being undertaken as part of the Regional and local municipal compliance with the *Growth Plan* that may affect the land supply. The land supply data associated with the over 75,000 units on

vacant lands is well along in the planning process and is unlikely to require any change to meet *Growth Plan* requirements. On the other hand, the intensification component of supply will be subject to significant change.

The *Growth Plan* designates three Urban Growth Centres (UGC) in Halton Region, generally in the vicinity of Downtown Burlington, Oakville's Midtown Core and Milton's Main Street Corridor. The UGCs are intended to be areas of concentrated development including significant residential and employment intensification. While the location is already determined, the boundaries of these areas and their development potential are to be defined by the Region and the local municipalities. In addition to the UGCs, the *Growth Plan* directs municipalities to consider intensification potential in transit station areas (in Halton's case, these would be the GO stations, not already within the Milton and Oakville UGCs). The *Growth Plan* also suggests a more detailed analysis of intensification potential in other areas may be required. To address these issues the following work is being undertaken by the local municipalities in Halton Region:

- The City of Burlington has defined the boundaries of its Downtown Burlington Urban Growth Centre and is in the process of finalizing the analysis of development potential in the defined area. The information was not included in the land supply analysis, since similar information is not yet available for the two other UGCs.
- Oakville and Milton will be defining the boundaries of the urban growth centres in two communities and determining the development potential within the areas.
- The Town of Oakville has recently begun a major intensification study that will determine intensification potential in the station areas and other intensification potential in the community.
- The City of Burlington has relatively up-to-date data on intensification (incorporated into this supply analysis), but will be finalising intensification potential in the UGC area as well as assessing potential in the transit station areas.
- Milton's intensification potential within the pre-HUSP urban area of the community will be determined through the Sustainable Halton process through updates of previous intensification analyses.
- Halton Hills recently undertook an extensive analysis of intensification potential as part of the Town's recent official plan review. These data are incorporated into the current supply information. Some additional opportunities for intensification may result from the Town's GO Station Secondary Plan, the preparation of which is scheduled to commence in 2007.

As these various studies and analyses are complete, they can be incorporated into a later work in the Sustainable Halton process.

While this work is substantial, it will only affect the land supply in the intensification categories and will only significantly increase the potential supply of medium and higher density units. The method of assessing future urban land needs is based on distinguishing greenfield development from intensification development. The specific approach means that the additional intensification analysis can be incorporated later for completeness but is neither required to complete the Sustainable Halton land need analysis at this stage nor likely to result in a significant difference in needs for new urban land.

The analyses of the growth scenarios provided in the following section requires working assumptions about what this forthcoming work will produce. For this purpose a working assumption has been adopted that the additional intensification supply work and future infill development that may not be identifiable now will provide for an additional 2,000 rowhouse units beyond the approximately 7,500 unit potential currently identified within the built boundary. Also, if the *Growth Plan* target is to be achieved, it must be assumed that this further work will be able to identify sufficient potential for apartment development to accommodate the required demand to 2031. As detailed later, this requires an additional supply of approximately 14,000 apartment units beyond the 18,000 currently identified as potential within the built boundary.

C. HALF OF THE REGIONAL EMPLOYMENT LAND SUPPLY IS OCCUPIED

The Region's draft *Comprehensive Economic Development Strategy*, prepared in 2006, was intended to provide the basis for planning for future employment land need in Halton. As background for the economic development strategy and for the ROPA 25 hearing a detailed current Regional employment land supply was prepared.

The analysis is based only on the occupied and vacant supply of designated lands in business parks and industrial-type areas. Employment lands for current purposes does not include lands that accommodate employment such as retail, service and institutional lands. This is consistent with the definition of the different types of employment described earlier in this report and is consistent with the planning definitions now in use in the *Growth Plan* and other provincial policy.

Land supply is defined in terms of net ha, meaning the privately held land parcels, but not land occupied by local roads or utilities, such as storm water management. In areas where lands have not been subdivided, assumptions have been made as to the net land areas expected to be produced from the parcels. The Region's employment land supply is summarized in Table 6.

	Occupied	Vacant	Total
Burlington	890	460	1,350
Oakville	1,100	290	1,340
North Oakville	10	530	540
Milton	240	30	270
Milton HUSP (Phase 1 & 2)	120	850	970
Halton Hills	170	60	230
Halton Hills HUSP (401 Corridor)	70	300	370
Total	2,580	2,530	5,110

Source: Background Report to R. Mathew witness statement for ROPA 25 hearing, Urban Land Supply: 2006 Update to Regional Supply in Adequacy of Land Supply in Halton Region, 2002, March 2006

Note: Totals may not add due to rounding.

The majority of the remaining supply, 2,530 hectares, is within the HUSP areas designated in 1999. These areas include: the Milton HUSP lands, the Halton Hills HUSP lands (401 corridor) and North Oakville. Only portions of these lands are currently available for immediate development.

The residential supply in the Region of Halton, within the designated urban areas, is 256,000 units, made up of 160,000 existing units and nearly 96,000 future potential units. The Region's employment land supply is made up of approximately 5,110 net ha of which approximately half are occupied and the remainder, an estimate 2,530 net ha are vacant.

In the following chapters, the supply of residential and employment land is compared to the growth forecast discussed in Chapter II, leading to conclusions regarding the need for additional urban land designations.

IV FUTURE RESIDENTIAL LAND NEEDS BASED ON A RANGE OF INTENSIFICATION ASSUMPTIONS

Previous chapters have established the demand for residential growth in terms of population and total housing units and have established the supply within the urban boundary of potential development by housing unit type. The next step in the process is to determine how many of the total housing units can be accommodated within the urban boundary and, in turn, how many would need to be accommodated in new urban areas.

The calculation, however, is not the simple subtraction of supply and demand for housing units. How the units are accommodated depends on the housing unit types desired by individual households in the marketplace compared to those that are available in the planned supply.

In addition, the *Growth Plan* imposes new rules as to how growth can be accommodated, particularly the 40% intensification rule, which states that:

By the year 2015 and for each year thereafter, a minimum of 40 per cent of all residential development occurring annually within each upper- and single-tier municipality will be within the built-up area¹.

As noted elsewhere in this report, demand by individual households for new housing favours ground-related units², whereas the supply available through intensification is predominately in an apartment form. Finding an accommodation between this mismatch, while attempting to meet the *Growth Plan* 40% rule, is a central challenge for the Sustainable Halton process.

To help understand the challenges and trade-offs in determining the future urban land needs and meeting the *Growth Plan* rules, three scenarios of housing unit growth have been defined. The scenarios are based on a shift of housing demand patterns by unit type to achieve different levels of intensification, which, in turn, affects the amount of new urban land required to meet the *Growth Plan* population forecasts.

¹ The concept of built up area is somewhat broader than the generally understood definition of intensification. The built up area will be defined by a built boundary, which will be a mapped line around the developed urban area, determined by the Province. Development within the boundary will count towards the 40% whether it is a remaining greenfield parcel or true infill or redevelopment. In south Halton, for example, the built boundary is likely just to be Dundas Street, across Oakville and eastern Burlington.

²Ground-related housing is a collective term for single detached, semi-detached and row house units, the key attributes of which are a private entrance, private on-site parking and private ground-level outdoor space. This is distinguished from apartment-type units where the unit entrance and parking access often involve shared indoor or outdoor space and where private outdoor space, if any, is in balcony rather than ground-level form.

The key principle is that: the greater the number of apartments and the fewer the number of single and semi-detached units built, the more that growth can be accommodated through intensification. As a result of more growth in intensification, the fewer number of units would be required to be accommodated on new urban lands.

Therefore, the three housing demand, land need and intensification scenarios are distinguished from each other by the housing mix: the more growth that is accommodated in apartments and the less in low density, the greater the opportunity to accommodate growth through intensification. Put simply, apartments take much less land to accommodate the same number of units compared to other housing forms, making apartments easier to physically accommodate in a built up area. The three scenarios tested are:

Scenario 1: GGH Growth Outlook

This scenario is based on the future housing mix contained in the forecast report, the *Growth Outlook for the Greater Golden Horseshoe*. Scenario 1 incorporates some shift in the market place from lower density housing forms to medium and higher density forms over the forecast period, but in a small and gradual way that is reasonably achievable with current policy tools.

Scenario 2: Halton Joint Municipal Housing Statement Target Housing Mix

This scenario is based on Halton's own existing housing mix policy targets of 55% single and semi-detached units, 25% rows and 20% apartments. Scenario 2 moves today's market to this mix over next 10 years and remains at this housing mix to 2031. This is a denser housing mix than Scenario 1 (i.e. more rows and apartments).

Scenario 3: Shift to Growth Plan's Required 40% Housing Growth Within Built Boundary over Ten Years

This scenario is based on moving to the accommodation of 40% of new housing growth within the built boundary by 2016, as required by the *Growth Plan*. Scenario 3 requires a denser housing mix than Scenarios 1 or 2, and, therefore, embodies an even greater shift in social and economic preferences by individual households. Significant changes to Provincial, Regional and local policies would be required if such a goal were to be achieved.

What distinguishes these scenarios from each other is the change in housing mix that is required to achieve different levels of growth within the built boundary as defined by the *Growth Plan*. For each of the scenarios, the shifts in housing unit type and the locations of growth are summarized in two following tables, with three more

detailed tables provided following for those readers interested in a more detailed understanding of the calculations.

The housing mix for future housing development associated with each of the Scenarios is summarized in Table 7 as well as the historic pattern over the past 20 years for the purposes of comparison. Two time periods are shown for each scenario: 2006 to 2016, the next ten years, which is prior to the *Growth Plan's* 40% intensification rule coming into full force. The following period of fifteen years from 2016 to 2031 is when the 40% intensification rule would be in full force¹.

The table shows the significant shift in housing preferences, to over one-third of new housing units in apartments, that would need to occur over the next ten years to meet the *Growth Plan's* 40% intensification rule.

Table 7				
Housing Mix in Halton Region Under Three Scenarios Compared to Historic Housing Mix				
Historic and Growth Under Three Intensification Scenarios				
Housing Mix in Halton Region for New Housing Built Over the Past 20 Years				
		Singles & Semis	Rows	Apartments
Historic Halton Housing Mix	1986–1996	60%	21%	19%
	1996–2006	68%	24%	8%
Housing Mix in Halton Region for New Housing Built Over the Next 25 Years for Three Intensification Scenarios				
Scenario 1 Mix (GGH)	2006–2016	64%	24%	12%
	2016–2031	57%	27%	16%
Scenario 2 Mix (Housing Statement)	2006–2016	59%	28%	13%
	2016–2031	50%	30%	20%
Scenario 4 Mix (40% Intensification)	2006–2016	59%	28%	13%
	2016–2031	37%	28%	35%

¹The Growth Plan 40% intensification rule actually comes into force in 2015. The enforcement of this rule is likely to be based on construction starts or building permits issued. The analysis here is based on completed housing units. The Census day 2016 division between the time periods for completed and occupied units approximates the Growth Plan's 2015, due to construction time required.

Based on these scenarios and the housing mix associated with each, Table 8 indicates where, during the period when the Growth Plan 40% rule is in full force (2016 to 2031), growth would be occurring in Halton Region. The growth is divided into three locations:

- Inside the built up areas of the Region which is what is generally being referred to as intensification during this later time period.
- Currently designated greenfield areas, comprised largely of the lands still remaining for development in North Oakville and the Milton expansion area after 2016 (other newer areas like Alton and south Georgetown will be largely completed by 2016).
- New urban areas would be additional urban land designations to accommodate units that could not be accommodated in either of the other two locations.

The table indicates that planned greenfield areas will accommodate about the same amount of growth 21% to 23% in any of the scenarios. The primary change here among the scenarios is between the intensified development within the built boundary and the new urban areas, beyond existing designations.

Table 8 Location of New Housing Units in Latter Part of Planning Period (After the 40% Intensification Rule is Fully Enforceable)				
		Within Built Boundary	In Currently Designated Greenfield Areas	In New Urban Areas
Scenario 1 (GGH)	2016– 2031	23%	21%	56%
Scenario 2 (Housing Statement)	2016– 2031	26%	22%	52%
Scenario 3 (40% Intensification)	2016– 2031	40%	23%	37%

Tables 9, 10 and 11 provide more details on the results of the analysis of the scenarios, indicating the number of units by type within the geographic areas in comparison to the identified housing unit supply (described in Chapter II). There are three key results shown conclusions of the analysis, shown at the bottom of the tables:

- The proportion of new housing development between 2016 and 2031 accommodated within the built boundary is shown as the shaded figure. This total can be compared to the *Growth Plan's* 40% intensification rule as a measure of whether or not the rule is achieved under the scenario. This level of intensification would only be achieved in Scenario 3.
- The need for additional housing unit supply to be accommodated through intensification, beyond the currently counted supply, is shown in the second last line of each table. This is a key conclusion as it determines the additional housing unit potential that will need to be found through the intensification studies to be undertaken by the local municipalities and the Region. For rowhousing, the additional 2,000 units described in the previous chapter, is the *assumed* potential for additional rowhouse units that can be found within the Built Boundary through the forthcoming intensification studies.
- The need for housing units on new urban lands in the Region by 2031 is shown in the last line of each table. This is a key conclusion as it acts as the basis for the calculation of land needs in the next chapter of this report.

Table 9
Scenario 1:
Using Housing Mix from the *Growth Outlook for the Greater Golden Horseshoe*

		Single-Semi	Rows	Aparts.	Total	
How does forecast housing growth compare to available supply? [housing supply – housing demand = remaining supply or additional need]	<u>Total Halton Region</u>					
	Housing Supply 2006	45,400	23,200	27,000		
	Less Housing Demand 2006–16	(35,500)	(13,100)	(6,600)	(55,300)	
	Less Housing Demand 2016–31	(45,600)	(21,600)	(13,100)	(80,300)	
	Remaining Vacant Supply 2031 or (additional supply needed)	(35,700)	(11,600)	7,200		
Where will the growth be accommodated? (i.e., what is the demand and supply relationship in each part of the Region.)	<u>Within Built Up Area</u>					
	Housing Supply 2006	10,500	7,400	18,600		
	Less Housing Demand 2006–16	(9,100)	(3,900)	(6,400)	(19,400)	
	Less Housing Demand 2016–31	(1,400)	(5,500)	(11,800)	(18,600)	
		0	(2,000)	400		
	Remaining Vacant Supply 2031 or (additional supply needed)					
	<u>Within Greenfield Areas</u>					
	Housing Supply 2006	34,800	15,800	8,400		
	Less Housing Demand 2006–16	(26,300)	(9,200)	300	(35,900)	
	Less Housing Demand 2016–31	(8,500)	(6,600)	1,300	(25,200)	
	0	0	6,800			
Remaining Vacant Supply 2031 or (additional supply needed)						

Table 9
Scenario 1:
Using Housing Mix from the *Growth Outlook for the Greater Golden Horseshoe*

	<u>In New Urban Areas</u>					
	Housing Supply 2006		0	0	0	
	Less Housing Demand 2006–16		0	0	0	0
			(35,700)	(9,600)	0	(45,300)
	Less Housing Demand 2016–31					
			(35,700)	(9,600)	0	
	Remaining Vacant Supply 2031 or (additional supply needed)					
What are the key conclusions?	Share of unit growth within the Built Boundary 2016-2031 (Compare total to Growth Plan's 40%)		3%	25%	90%	23%
	Additional Supply Needed	Additional Intensification	0	2,000	0	2,000
		New Urban Areas	35,700	9,600	0	45,900

Table 10
Scenario 2:
Moving to the Region's Target Mix (55/25/20) by 2016 and for the 2016–31 period

		Single-Semi	Rows	Aparts.	Total
How does forecast housing growth compare to available supply? [housing supply – housing demand = remaining supply or additional need]	<u>Total Halton Region</u> Housing Supply 2006	45,400	23,200	27,000	
	Less Housing Demand 2006–16	(35,500)	(13,800)	(6,900)	(55,300)
	Less Housing Demand 2016–31	(44,200)	(20,100)	(16,100)	(80,300)
	Remaining Vacant Supply 2031 or (additional supply needed)	(33,300)	(10,700)	4,000	
Where will the growth be accommodated? (i.e., what is the demand and supply relationship in each part of the Region.)	<u>Within Built Up Area</u> Housing Supply 2006	10,500	7,400	18,600	
	Less Housing Demand 2006–16	(9,200)	(4,000)	(6,600)	(19,900)
	Less Housing Demand 2016–31	(1,300)	(5,400)	(14,500)	(21,100)
	Remaining Vacant Supply 2031 or (additional supply needed)	0	(2,000)	(2,500)	
	<u>Within Greenfield Areas</u> Housing Supply 2006	34,800	15,800	8,400	
	Less Housing Demand 2006–16	(25,300)	(9,800)	300	(35,400)
	Less Housing Demand 2016–31	(9,500)	(6,000)	1,600	(22,700)
	Remaining Vacant Supply 2031 or (additional supply needed)	0	0	6,500	

Table 10
Scenario 2:
Moving to the Region's Target Mix (55/25/20) by 2016 and for the 2016–31 period

	<u>In New Urban Areas</u>					
	Housing Supply 2006		0	0	0	
	Less Housing Demand 2006–16		0	0	0	0
			(33,300)	(8,700)	0	(45,000)
	Less Housing Demand 2016–31					
			(33,300)	(8,700)	0	
	Remaining Vacant Supply 2031 or (additional supply needed)					
What are the key conclusions?	Share of unit growth within the Built Boundary 2016-2031 (Compare total to Growth Plan's 40%)		3%	27%	90%	26%
	Additional Supply Needed	Additional Intensification	0	2,000	2,500	4,500
		New Urban Areas	33,300	8,700	0	42,000

Table 11
Scenario 3:
Moving to 40% of Unit Growth Within Built Boundary by 2016

		Single-Semi	Rows	Aparts.	Total
How does forecast housing growth compare to available supply? [housing supply – housing demand = remaining supply or additional need]	<u>Total Halton Region</u>				
	Housing Supply 2006	45,400	23,200	27,000	
	Less Housing Demand 2006–16	(32,900)	(15,500)	(6,900)	(55,300)
	Less Housing Demand 2016–31	(29,500)	(22,500)	(28,300)	(80,300)
	Remaining Vacant Supply 2031 or (additional supply needed)	(17,000)	(14,800)	(8,200)	
Where will the growth be accommodated? (i.e., what is the demand and supply relationship in each part of the Region.)	<u>Within Built Up Area</u>				
	Housing Supply 2006	10,500	7,400	18,600	
	Less Housing Demand 2006–16	(9,000)	(4,200)	(6,600)	(19,900)
	Less Housing Demand 2016–31	(1,500)	(5,200)	(25,500)	(32,100)
		0	(2,000)	(13,500)	
	Remaining Vacant Supply 2031 or (additional supply needed)				
	<u>Within Greenfield Areas</u>				
	Housing Supply 2006	34,800	15,800	8,400	
	Less Housing Demand 2006–16	(23,800)	(11,300)	300	(35,400)
	Less Housing Demand 2016–31	(11,000)	(4,500)	2,800	(11,700)
	0	0	5,300		
Remaining Vacant Supply 2031 or (additional supply needed)					

Table 11
Scenario 3:
Moving to 40% of Unit Growth Within Built Boundary by 2016

	<u>In New Urban Areas</u>					
	Housing Supply 2006		0	0	0	
	Less Housing Demand 2006–16		0 (17,000)	0 (12,800)	0 0	0 (29,800)
	Less Housing Demand 2016–31		(17,000)	(12,800)	0	
	Remaining Vacant Supply 2031 or (additional supply needed)					
What are the key conclusions?	Share of unit growth within the Built Boundary 2016-2031 (Compare total to Growth Plan's 40%)		5%	23%	90%	40%
	Additional Supply Needed	Additional Intensification	0	2,000	13,500	15,500
		New Urban Areas	17,000	12,800	0	29,800

V RANGE OF NEW URBAN LAND NEED INCLUDES RESIDENTIAL, EMPLOYMENT AND OTHER URBAN USES

The previous sections have determined the demand and supply for urban lands in Halton, based on a range of housing unit and employment land need to 2031. The final step in the analysis is to determine specifically the amount of new urban land that may need to be designated in the Region to accommodate growth to 2031. This would be the amount of new urban land that would need to be provided in the Primary Study Area, beyond the Region's existing designations. The total new land need is based on the need for residential land, employment land and other developed urban land needs. The natural heritage system that is within urbanised areas is dealt with as a separate matter and is considered additional to the land requirements shown here.

A. ADDITIONAL RESIDENTIAL LAND NEEDED TO ACCOMMODATE GROWTH TO 2031 IS IN THE RANGE OF 1,800 TO 2,800 GROSS HECTARES

Residential urban land needs for new urban areas (beyond existing designations) are based on the analysis in the previous section, which determined the number and type of units required. The detailed analysis is shown in Tables 12, 13 and 14 for each of the three scenarios. The key assumptions are as follows:

- The analysis is based on planning for complete communities, in terms of housing type, within the new urban areas. Though the analysis for new urban areas in the previous section only determined a need for additional lands for singles, semis and rows, a complete community should also be planned to accommodate eventual apartment development. For this purpose, the assumption is that new communities will be planned to accommodate at least 20% of units in an apartment form.
- The gross neighbourhood density is based on the densities currently being achieved in the Milton area. These residential densities meet the *Growth Plan* requirement of development at a minimum of 50 persons plus employees per gross urban ha.

Table 12 New Urban Land Need: Intensification Scenario 1			
	Ground-Related	Aparts.	Total
Units Required in New Urban Areas	45,300	0	45,300
Design Mix for a Balanced Community at Ultimate Development (80% ground related and 20% apartments)	45,300	11,300	56,600
Gross Neighbourhood Density (uph)*	18	50	21
Gross Neighbourhood Land Need (ha)	2,520	230	2,750

*Gross neighbourhood density is the net residential land plus other neighbourhood level uses, generally including local roads, local parks, elementary schools, local retail and stormwater management.

Table 13 New Urban Land Need: Intensification Scenario 2			
	Ground-Related	Aparts.	Total
Units Required in New Urban Areas	42,100	0	42,100
Design Mix for a Balanced Community at Ultimate Development (80% ground related and 20% apartments)	42,100	10,500	52,600
Gross Neighbourhood Density (uph)*	18	50	21
Gross Neighbourhood Land Need (ha)	2,340	210	2,550

*Gross neighbourhood density is the net residential land plus other neighbourhood level uses, generally including local roads, local parks, elementary schools, local retail and stormwater management.

Table 14			
New Urban Land Need: Intensification Scenario 3			
	Ground-Related	Aparts.	Total
Units Required in New Urban Areas	29,800	0	29,800
Design Mix for a Balanced Community at Ultimate Development (80% ground related and 20% apartments)	29,800	7,500	37,300
Gross Neighbourhood Density (uph)*	18	50	21
Gross Neighbourhood Land Need (ha)	1,660	150	1,810

* Gross neighbourhood density is the net residential land plus other neighbourhood level uses, generally including local roads, local parks, elementary schools, local retail and stormwater management.

B. FORECAST EMPLOYMENT LAND INDICATES MINIMUM REQUIREMENT IN THE REGION OF 600 GROSS HECTARES

Future employment land requirements in the Region of Halton are estimated by applying a density factor to an estimate of future job growth on employment land. As shown in Table 15, an estimated 64% of Regional employment growth will be accommodated on employment land.

Table 15 Halton Employment Land Need to 2031				
	Employment Land Employment	Major Office Employment	Population Related Employment	Total
Growth 2005-2031	81,000	29,000	49,000	159,000
% on Employment Land	100%	65%	5%	64%
Growth on Employment Land	81,000	18,900	2,500	102,400
Employees per net ha	37.5	250	75	45
Land Demand (ha)	2,160	77	33	2,270
Share of Total Land Demand	95%	3%	2%	100%

Note: Employment density of 37.5 per ha for employment land employment is a reasonable estimate of employment density and was used in work on both the Oakville OPA 198 and North Oakville Secondary Plan. Estimated employment land densities in other municipalities in the GTAH are comparable, including: Vaughan 35 eph, Caledon 35 eph, Mississauga 38 eph and Brampton 42 eph. Note that freestanding office buildings within employment areas are not included in this calculation. All freestanding office buildings are separately calculated as part of the major office employment category. Employment density of 250 per ha for major office employment is based on 0.7 coverage and 28m² per employee. Employment density of 75 per ha for population related employment is based on 0.3 coverage and 40m² per employee, both are typical ratios for this type of development in the GTA.

Through the application of specific density factors, it can be estimated that approximately 2,270 net ha of employment land will be required to accommodate future job growth. The majority — 95% of the land area — will be in industrial-type buildings, or employment land employment. Based on the employment land need forecast extracted from the *Growth Plan* employment forecasts, and the employment land supply within the Region's economic development strategy and ROPA 25 witness statement, it is estimated that this future demand exceeds the current designated employment land supply by approximately 250 net ha. This is shown in Table 16.

Occupied Employment Land	2,580
Vacant Employment Land	<u>2,530</u>
Total Employment Land	5,110
Full Employment Capacity of Land is at 90% development (see note)	<u>(510)</u> 4,600
Occupied Employment Land, 2005	2,580
Land Demand 2005–2031	<u>2,270</u>
	4,850
Land Shortfall	(250)

Note: Development capacity is based on 90% occupancy of the total occupied and vacant lands in Halton. This is a standard factor based on there being 5% of the total land area long-term vacancy (never developed) and another 5% of the land base, at the end of the development period, as having been developed but would be under-utilised or have changed use from a standard employment land activity. The estimated shortfall of 250 net hectares of employment land does not take into account additional lands needed to provide for flexibility for municipalities in the timing and location of development, long-term vacancy, and choice and competition in the market place. Under the anticipation that 10% of future land demand between 2005 and 2031 will be required for flexibility, timing, long-term vacancy, and choice and competition in the market, an additional 230 net hectares of employment land will be required.

Therefore, the total future land need in new urban areas, including an adjustment for market choice and flexibility, is a total of 480 net hectares. Using a net to gross factor of 80%, this translates into a need for an additional 600 gross hectares of employment land, beyond the existing urban boundary, to accommodate growth to 2031. Table 17 incorporates this estimate into the Region's total employment land supply in 2031. As shown, all of the designated employment land within existing built-up areas and within the HUSP expansion areas will have reached 90% development and the land shortfall of 250 net hectares will have been provided for and fully developed.

Table 17						
Region of Halton Employment Land Supply and Employment Land Need to 2031						
(Business park and industrial-type lands in net hectares)						
	2005			2031		
	Occupied	Vacant	Total	Occupied	Vacant	Total
<u>Within Built Up Area</u>						
Burlington	890	460	1,350	1,210	140	1,350
Oakville	1,100	290	1,390	1,250	140	1,390
Milton	240	30	270	240	30	270
Halton Hills	170	60	230	210	20	230
Sub-Total	2,400	840	3,240	2,910	330	3,240
<u>HUSP Expansion Areas</u>						
Oakville	10	530	540	490	50	540
Milton	120	850	970	870	100	970
Halton Hills	70	300	370	330	40	370
Sub-Total	200	1,680	1,880	1,690	190	1,880
New Urban Areas	n/a	n/a	n/a	250	230	480
Total	2,600	2,520	5,120	4,850	750	5,600

Source: Background Report to R. Mathew witness statement for ROPA 25 hearing, *Urban Land Supply: 2006 Update to Regional Supply in Adequacy of Land Supply in Halton Region, 2002*, March 2006

C. TOTAL URBAN LAND NEED TO 2031 WOULD BE IN THE RANGE OF 3,000 TO 4,200 GROSS HA OF URBAN LAND IN THE PRIMARY STUDY AREA

Total urban land need in new urban areas is determined through the addition of the residential and employment land needs plus a factor for other urban uses that are not necessarily provided within the calculated gross residential or employment areas. This analysis is based on these other uses taking up 20% of the total urban land area in addition to the calculated gross residential and employment land needs.

These other urban uses include a wide range of activities not included within normal neighbourhood and subdivision plans, including major retail centres, arterial roads, secondary schools, major institutions such as hospitals and colleges, cemeteries, urban golf courses and major utilities to name a few of the types of uses. In the past, including in the HUSP work in the 1990s, a typical assumption for these other uses was 30% of total urban land. The 30% of total urban land remains a reasonable assumption for the overall development of the Region. However, since the Sustainable Halton exercise is specifically selecting lands suitable for urban development, it is assumed that some other land uses will not be present in the identified Sustainable Halton expansion areas. For example, it is unlikely that hydro corridor lands or golf course lands would be included in potential development areas under analysis in Sustainable Halton (based on the 20%), but might ultimately be within the urbanized area of the Region (based on the 30% figure). In addition, it has also been assumed that the various policy initiatives underway to reduce urban land consumption will also affect the other urban uses, making a reduced assumption of 20% more appropriate for Sustainable Halton.

Table 18		
New Urban Land Need: Intensification Scenario 1		
Gross Residential Need (in ha, including local roads, parks, schools, etc.)		2,750 600
Gross Employment (in ha, including local roads and utilities)		
Other Land Uses (ha)	20%	840
Total Developable Land Need (ha)		4,190

Table 19		
New Urban Land Need: Intensification Scenario 2		
Gross Residential Need (in ha, including local roads, parks, schools, etc.)		2,550 600
Gross Employment (in ha, including local roads and utilities)		
Other Land Uses (ha)	20%	790
Total Developable Land Need (ha)		3,940

Table 20		
New Urban Land Need: Intensification Scenario 3		
Gross Residential Need (in ha, including local roads, parks, schools, etc.)		1,810
Gross Employment (in ha, including local roads and utilities)		600
Other Land Uses (ha)	20%	600
Total Developable Land Need (ha)		3,010

In summary, urban land need in new urban areas for residential, employment, and other uses will range from 3,010 ha (Scenario 3) to 4,190 ha (Scenario 1). Essentially, the more aggressive intensification scenario for development within the built boundary, the less demand for new urban land.

The current urban designated area in Halton (including existing development and designated greenfield areas) is a total of 25,220 ha. The range of new urban land need would represent an incremental expansion of the urban area of 12% to 17%.

VI OPTIONS FOR SUSTAINABLE HALTON

The scenarios explored in this report relate to the degree, in the period to 2031, to which new housing development is accommodated within the built-up area. The rules in the *Growth Plan*, as stated, would require the Region to achieve the scenario requiring the greatest intensification and the greatest change in housing type, but requiring the least amount of new urban land. The key choices for the Region are how much the changes in the types of housing built in the Region might be achieved.

Through the Sustainable Halton process options will be explored with the Province to achieve the intent of the *Growth Plan* while better integrating with the Region's planned urban structure and its own planning goals.

APPENDIX A

**REGIONAL RESIDENTIAL SUPPLY
BY LOCAL MUNICIPALITY**

Provided below is a series of tables showing the residential unit supply for each of the four municipalities within the Region of Halton — the City of Burlington, Town of Oakville, Halton Hills, and Milton. The Milton HUSP area and North Oakville are separated for analytical purposes. For additional information and commentary the background report *Urban Land Supply: 2006 Update to Regional Supply in Adequacy of Land Supply in Halton Region, 2002* should be consulted.

CITY OF BURLINGTON

Detailed Residential Supply, Burlington Year-End 2005							
	Estimated 2005 Existing Units	Registered & Draft Approved	Applications		Intensification		Vacant Potential
			Excluding Alton	Alton	Identified	Additional Infill & Rural	
Singles & Semis	37,770	1,640	1,220	590	540	260	4,250
Rows	11,500	650	520	0	1,190	0	2,360
Apartments	15,310	1,500	910	0	1,670	2,220	6,290
Total	64,580	3,800	2,640	590	3,390	2,480	12,890

Source: Statistics Canada Census, 2001, CMHC housing statistics, the City of Burlington (Urban Metrics) and Hemson Consulting Ltd.

Note: Totals may not add due to rounding

TOWN OF OAKVILLE

Detailed Residential Supply - South Oakville - End 2004							
	Estimated 2004 Existing Units	Vacant Supply			Intensification		Vacant Potential
		Registered	Draft Approved	Applica tions	Identified	Additional Infill	
Singles & Semis	39,100	800	2,700	170	290	0	3,970
Rows	7,390	310	1,540	280	1,470	0	3,600
Apartments	9,290	130	830	1,100	5,680	0	7,730
Total	55,770	1,240	5,070	1,550	7,440	0	15,290

Source: Statistics Canada Census, 2001, CMHC housing statistics, the Town of Oakville and Hemson Consulting Ltd.

Note: Additional Infill potential for Oakville is different from original, as identified estimates already incorporate unrealized opportunities. Totals may not add due to rounding

NORTH OAKVILLE EXPANSION AREA

North Oakville Potential Residential Unit Supply					
	Estimated Existing Units (occupied)		Remaining Supply		Estimated Total (Occupied Units)
	Census 2001	2005	2005 (Total)	Less Vacancy Factor	
Singles & Semis	0	0	9,700	(50)	9,650
Rows	0	0	5,480	(50)	5,430
Apartments	0	0	5,860	(120)	5,740
Total	0	0	21,030	(220)	20,810

Source: The North Oakville numbers are a combination of the plan currently prepared by the Town and the settling land owners for the board as part of the North Oakville Secondary Plan East Ontario Municipal Board Hearing; and The North Oakville West numbers based on the Town's secondary plan.

Note: Totals may not add due to rounding.

The Remaining supply of units is reduced by 0.5 per cent for singles and semis, 1.0 per cent for rows and 2.0 per cent for apartments to account for vacant units.

The potentials shown are estimates prepared by Hemson based on a variety of information sources and judgements about likely future development. The figures do not necessarily reflect those in official plans.

TOWN OF HALTON HILLS

Detailed Residential Supply, Halton Hills Year End 2005							
	Estimated 2005 Existing Units	Vacant Supply			Intensification		Vacant Potential
		Registered	Draft Approved	Applicat ions	Identified	Additional Infill & Rural	
Singles & Semis	15,660	180	480	1,520	290	190	2,650
Rows	1,540	190	80	550	710	0	1,530
Apartments	2,360	0	30	600	590	0	1,220
Total	19,560	370	590	2,670	1,590	190	5,410

Source: Statistics Canada Census, 2001, CMHC housing statistics, the Town of Halton Hills, the Region of Halton and Hemson Consulting Ltd.

Note: Totals may not add due to rounding

TOWN OF MILTON

Detailed Residential Supply, Pre-HUSP Milton and Rural Areas Year End 2005							
	Estimated 2005 Existing Units	Vacant Supply			Intensification		Vacant Potential
		Registered	Draft Approved	Applic ations	Identified	Additional Infill & Rural	
Singles & Semis	8,250	230	0	0	20	450	700
Rows	1,090	40	0	0	1,630	0	1,670
Apartments	1,730	50	0	0	1,840	240	2,130
Total	11,060	320	0	0	3,490	690	4,490

Source: Statistics Canada Census, 2001, CMHC housing statistics, the Town of Milton, the Region of Halton and Hemson Consulting Ltd.

Note: Totals may not add due to rounding

MILTON HUSP EXPANSION AREA

Detailed Residential Supply, Milton HUSP Expansion Area Year-End 2005								
	Estimated 2005 Existing Units	Vacant Supply			Vacant	Intensification		Vacant Potential
		Regis- tered	Draft Approv- ed	Applica- -tions		Identified	Additi- onal Infill & Rural	
<u>Bristol</u>								
Singles &	5,990	3,280	290	1,070	1,380	0	0	6,020
Semis	1,690	920	230	410	420	0	0	1,980
Rows	50	0	630	210	120	0	0	950
Apartments								
<u>Sherwood</u>	0	0	0	3,950	4,150	0	0	8,100
Singles &	0	0	0	1,700	1,180	0	0	2,890
Semis	0	0	0	240	910	0	0	1,140
Rows								
Apartments	0	0	0	0	11,000	0	0	11,000
<u>Milton</u>	0	0	0	0	4,260	0	0	4,260
<u>South</u>	0	0	0	0	1,820	0	0	1,820
Singles &								
Semis								
Rows								
Apartments								
Total	7,740	4,190	1,150	7,580	25,240	0	0	38,160

Source: Town of Milton, Region of Halton and Hemson Consulting Ltd.

Note: Totals may not add due to rounding