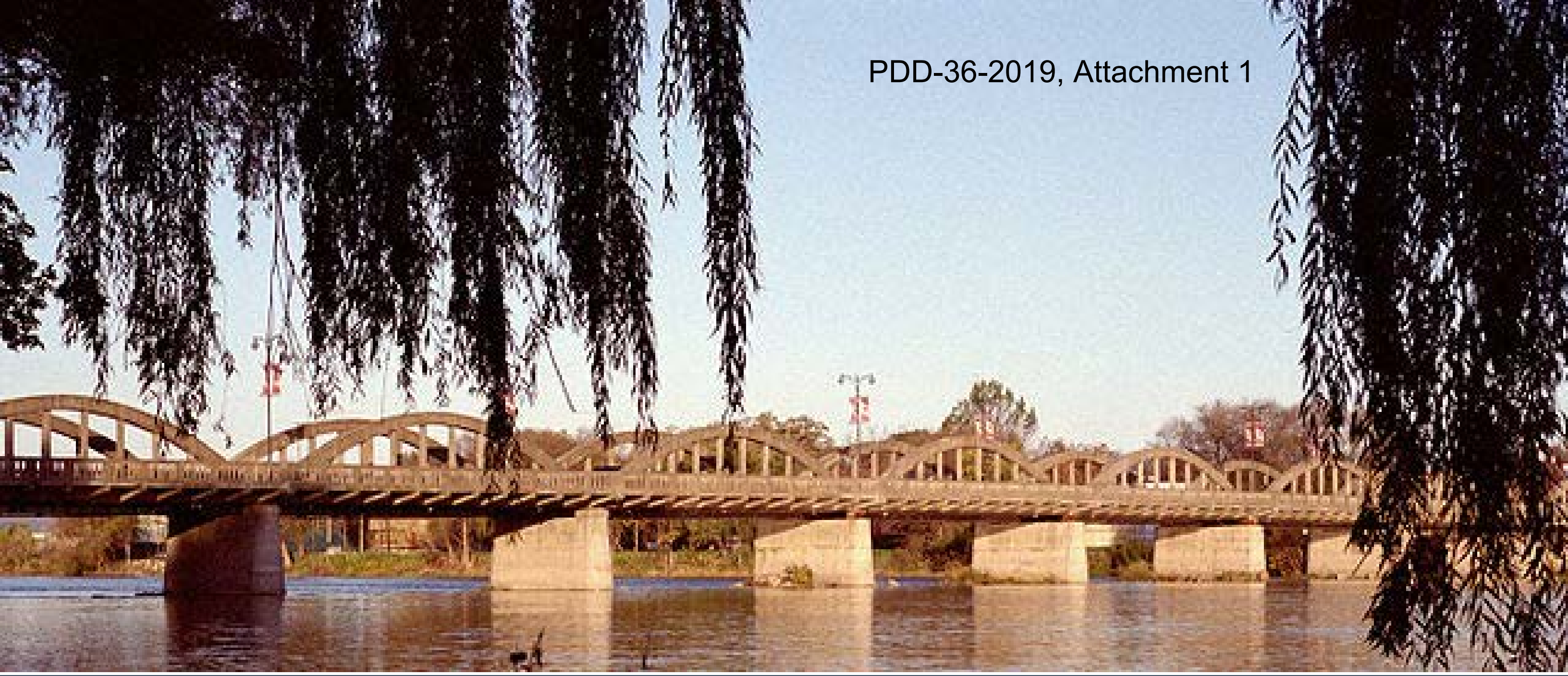
PDD-36-2019, Attachment 1



Population, Housing and Employment Forecast Update and Land Needs Assessment

Haldimand County

Draft Report

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
B.U.A.	Built-up area
C.M.A.	Census metropolitan area
D.G.A.	Designated greenfield area
G.G.H.	Greater Golden Horseshoe
G.I.S.	Geographic information systems
G.M.S.	Growth Management Strategy
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.N.A.	Land Needs Assessment
M.C.R.	Municipal comprehensive review
M.T.S.A.	Major Transit Station Area
O.P.	Official Plan
O.P.A.	Official Plan Amendment
P.P.S.	Provincial Policy Statement
P.P.U.	persons per unit
P.S.E.Z.	Provincially Significant Employment Zone
U.G.C.	Urban Growth Centre

Executive Summary

Executive Summary

Terms of Reference

Haldimand County retained Watson & Associates Economists Ltd. (Watson) in the spring of 2018 to undertake an update to the County's 2014 Population, Household and Employment Forecast Update.[1] As part of the terms of reference, a comprehensive assessment of urban land requirements has also been undertaken by Watson based on the revised long-term growth forecast. This urban land needs assessment has been prepared in accordance with the requirements of the Growth Plan, 2019 and the provincial Land Needs Assessment (L.N.A.) Methodology.[2, 3] In summary, the key objectives of this study are as follows:

- To prepare a detailed long-term population, housing and employment growth forecast for Haldimand County as per Schedule 3 of Growth Plan, 2019;[4]
- To review and assess the distribution of the County-wide population, housing and employment forecast by urban and rural area based on recent and anticipated development trends; and
- To assess the County's long-term urban land requirements in accordance with the framework of the Growth Plan, 2019 and Haldimand County Official Plan (O.P.), 2009, regarding residential intensification and greenfield density targets.

The results of this analysis are intended to guide decision-making and policy development specifically related to planning and growth management, urban land needs, municipal finance and infrastructure planning carried out for Haldimand County. More specifically, this growth forecast update will be used as background to the County's O.P. Review and 2019 Development Charges (2019 D.C.) Background Study.[5]

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[1] Haldimand County Population, Households and Employment Forecast Update, 2011-2041, prepared by Watson & Associates Economists Ltd., April 4, 2014.
[2] A Place to Grow: Growth Plan for the Greater Golden Horseshoe. 2019. Ontario.
[3] Lands Needs Methodology for the Greater Golden Horseshoe, May 2018.
[4] It is noted that for the purpose of this study, the Haldimand County population, housing and employment forecast has been extended to the year 2046.
[5] Development Charges Background Study, Haldimand County, prepared by Watson & Associates Economists Ltd., March 5, 2019.

The process of preparing the County's new O.P. represents a Municipal Comprehensive Review (M.C.R.), in accordance with section 26 of the *Planning Act*. The analysis provided herein represents a component of the County's M.C.R., as per provincial requirements and supporting guidance documents, and includes the following key technical inputs:

- Long-Term Population, Housing and Employment Forecast;
- Residential Supply and Intensification Analysis;
- Designated Greenfield Area Density Analysis;
- Employment Land Needs Analysis; and
- Community Land Needs Assessment.

Haldimand County Population and Employment Forecast, 2041 and 2046

Schedule 3 of the Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities within the G.G.H. to the year 2041. The County's 2041 population and employment growth forecast, provided herein, is consistent with the Growth Plan, 2019. For the purpose of this assignment, the County's long-term population and employment forecast has been extended to 2046 to provide additional direction with respect to the County's long-term growth potential. Details have also been provided as part of this study with respect to population growth by age, housing development by structure type, employment trends by major sector and land-use category, as well as the distribution of residential and non-residential development by urban area and remaining rural area, as well as planning policy area.

By 2046 Haldimand County's population and employment base is forecast to reach 67,800 and 26,100, respectively.[1] Based on our assessment of regional economic and demographic trends, as well as a review of the local housing and employment market, approximately 61% and 48% of County-wide housing and employment growth, respectively, has been allocated to Caledonia. Relative to historical trends, steady population growth is also forecast for the urban areas of Cayuga and Hagersville, while

[1] Population figures include a net Census undercount estimated at approximately 2.6%. The Census undercount represents the net number of permanent residents who are missed (i.e. over-coverage less under-coverage) during Census enumeration.

Dunnville, Jarvis and Townsend are anticipated to experience moderate to low population and employment growth levels over the next 30 years.

Housing Growth by Structure Type and Planning Policy Area

Over the 2016 to 2046 forecast period, low-density housing (i.e. single and semi-detached) is expected to comprise majority of new housing growth (61%), while the remainder of housing growth is anticipated to be geared towards medium- and high-density units, at 18% and 22%, respectively. Across the County, housing preferences by structure type are anticipated to gradually shift from low-density to medium-density and high-density housing forms over the long term. This shift will largely be driven by the aging of the County's population base and rising housing prices relative to household income.

The results of this study indicate that, similar to other municipalities across the Greater Golden Horseshoe (G.G.H), net migration will represent the primary driver of future population growth for Haldimand County. As the County's population and employment base continues to diversify in terms of its demographic, socio-economic and cultural composition, a broader range of new housing typologies by built-form, density, tenure and affordability will be required across the County's urban areas to accommodate the needs of new residents. The aging of the County's population is also anticipated to drive the need for seniors' housing and other forms of housing geared to older adults (e.g. assisted living, affordable housing, adult lifestyle housing). Given the diversity of the 65+ population, forecast housing demand across the County within this broad age group is anticipated to vary considerably.

In accordance with the requirements of the Growth Plan, 2019 and as further directed by the provincial L.N.A. Methodology, municipalities across the G.G.H. are required to direct new residential and non-residential development to the following planning policy areas:

Delineated Built-Up Area (B.U.A.)

The limits of the developed urban area as defined by the Minister in consultation with affected municipalities for the purpose of measuring the minimum intensification target.

Designated Greenfield Area (D.G.A.)

Lands within settlement areas but outside delineated built-up areas that have been designated in an official plan for development and are required to accommodate forecasted growth to the horizon of this Plan. Designated greenfield areas do not include excess lands.

Rural Lands

Lands which are located outside settlement areas and which are outside prime agricultural areas.[1]

Accommodating a greater share of high-density development within the County's built-up areas (B.U.A.) is fundamental to the objectives of the County O.P. As the County's urban areas continue to mature, there will be a growing need to increase the utilization of available, designated urban lands to accommodate new development in more compact forms, particularly through high-density development. Residential intensification within Haldimand's urban areas is also anticipated to bring new urban amenities and municipal services to the County (i.e. community services/facilities, shopping, personal services, arts and cultural facilities/events, etc.) as well as local employment opportunities, which will benefit both the County and its local residents. Accordingly, provincial and local policies direct the County to accommodate an increasing share of its population base in B.U.A.s, largely in high-density households. While this represents good planning policy, it is important to recognize that a large share of historical residential development within Haldimand County has been ground-oriented. To facilitate this shift towards more compact high-density urban development, the County may also need to consider the use of planning and/or financial tools, as well as other policies, that address the implementation of the County's long-term vision with respect to residential intensification.

Despite steady historical housing growth in the rural area of the County, both the percentage and absolute levels of future housing growth allocated to the rural area are forecast to decline in comparison to historical trends. From a market perspective, forecast demographic trends across the County and surrounding area suggest that the percentage share of future housing will continue to shift from the rural areas to the urban communities of the County as new residents continue to be attracted to the

[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Definitions, p. 89.

County in search of competitively priced housing options located within proximity to local urban amenities (i.e. schools, retail, personal service uses, etc.) and surrounding employment markets. To a lesser extent, housing demand from the 55-74 age group (empty-nesters/young seniors) and the 75+ age group (older seniors) is also anticipated to drive the future need for housing within proximity to urban amenities (i.e. shopping, entertainment, hospitals/health care) and other community infrastructure.

Community Area Land Needs, 2041

Haldimand County currently has approximately 683 gross ha (1,688 gross acres) of designated greenfield area (D.G.A.) lands in urban areas.[1] By 2041, the D.G.A. lands are forecast to accommodate approximately 14,500 people and jobs at a density of 48 people and jobs per gross ha. At an average density of 48 people and jobs per gross hectare, approximately 300 gross ha (741 gross acres) will be required to accommodate the Community Area D.G.A. population and employment by the year 2041. Comparing the results of this long-term urban land demand analysis with the County's current supply of designated, developable lands in Community Areas indicates that the County is anticipated to have an overall surplus of approximately 384 ha (949 gross acres) of D.G.A. community lands by 2041.

It is important to note that while the County is anticipated to have an overall surplus of community lands by 2041, it has a projected shortfall of approximately 18 gross ha (44 gross acres) of lands identified for non-residential uses within D.G.A. Community Areas (i.e. designated commercial areas).[2] As part of the County's O.P. review, the County should review, in further detail, location options to accommodate additional designated commercial lands within its urban areas.

It is further recognized that a large share (approximately 61%) of the identified 2041 Community Area land surplus identified for Haldimand County is concentrated within the urban areas of Jarvis and Townsend, where limited market demand for residential development currently exists. On the other hand, in Dunnville and Cayuga, where

[1] Refer to Appendix B for a breakdown of designated land area by status and urban area. Approximately 57 ha (141 acres) have been developed since 2018. Approved and pending applications comprise 231 ha (571 acres) of the land area, while 366 ha (904 acres) are currently vacant with no applications at this time.
[2] These are lands that are designated in the Haldimand County Official Plan as Large Format Retail and Community Commercial, as identified on Schedules B.1 to B.5.

market demand for residential development is relatively stronger, the supply of residential demand is more limited. Accordingly, it is recommended that the County's long-term urban land needs are closely monitored by urban area.

Employment Area Land Needs, 2041

By 2041, Haldimand County is forecast to have a surplus of approximately 127 gross ha (314 gross acres) of designated employment lands. Notwithstanding this identified County-wide surplus, the location of designated employment lands across Haldimand County is not uniformly distributed throughout the County's urban areas in accordance with forecast demand. More specifically, employment land shortages of approximately 12 gross ha (30 gross acres) and 3 gross ha (7 acres) have been identified in Hagersville and Cayuga, respectively. In contrast, Jarvis and Caledonia are anticipated to have an employment land surplus of 65 gross ha (160 gross acres) and 58 gross ha (143 gross acres), respectively, by the year 2041.

Report

Chapter 1
Introduction

1. Introduction

1.1 Terms of Reference

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- Residential Supply and Intensification Analysis;
- Designated Greenfield Area Density Analysis;
- Employment Land Needs Analysis; and
- Community Land Needs Assessment.

1.2 What is a Municipal Comprehensive Review?

A Municipal Comprehensive Review (M.C.R.) is used to establish a long-term vision and planning framework for a municipality that fosters a sustainable approach to future residential growth and economic development. Typically, an M.C.R. examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon. For municipalities located within the Greater Golden Horseshoe (G.G.H.), the long-term planning horizon is the year 2041.

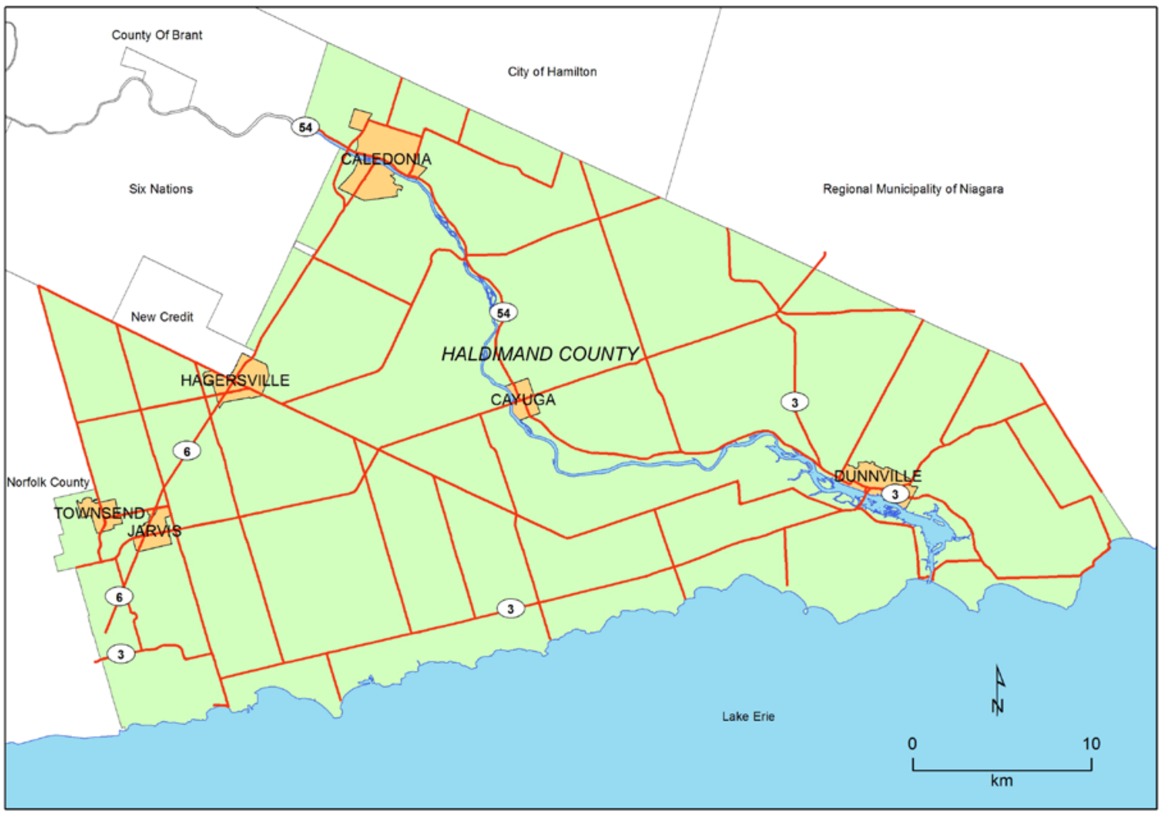
As previously stated, this study represents a component of County's M.C.R. process. This process is required to support the County's new O.P. and bring the local plan into conformity with the Growth Plan, 2019. Integral to this analysis for Haldimand County is a comprehensive review of how growth in the built-up area (B.U.A.) and designated greenfield areas (D.G.A.) will be planned, phased and accommodated. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development.

1.3 Background

1.3.1 Haldimand County – Local and Regional Growth Context

As illustrated in Figure 1-1, Haldimand County is located on the north shore of Lake Erie spanning over 1,250 square kilometres in area. As of 2016, the County had a population and employment base of approximately 46,800 and 18,000, respectively.[1] Haldimand County is a single-tier municipality established in January, 2001 through the amalgamation of the former Towns of Haldimand and Dunnville, part of the former City of Nanticoke and part of the former Regional Municipality of Haldimand-Norfolk. Haldimand County is primarily a rural area with a number of urban communities, including Caledonia, Cayuga, Hagersville, Townsend, Dunnville and Jarvis.

Figure 1-1
Haldimand County



The County is geographically well positioned in the economic heartland of Southern Ontario. A key driver of population growth for Haldimand County is its proximity to the Greater Toronto and Hamilton Area (G.T.H.A.) and the growing potential for County

[1] Note: 2016 population figures exclude the net Census undercount, which is estimated at approximately 2.6%. Employment figures include work at home and no fixed place of work.

residents who commute to the G.T.H.A. and other areas of the G.G.H. “Outer Ring” for employment. Over the next 30 years, the County’s local employment base is also forecast to increase, generating new live/work opportunities within Haldimand. The County is also located immediately west of Niagara Region, and is within an hour’s drive to the United States (U.S.) border at Fort Erie, Ontario/Buffalo, New York.

Chapter 2
Policy Context

2. Policy Context

The two key provincial policy documents that apply to long-term growth management are the 2014 Provincial Policy Statement (P.P.S.), and the Growth Plan, 2019. The policies set out in these documents outline provincial land-use planning interests and provide high-level policy direction for municipalities.

2.1 Provincial Policy Statement

The 2014 P.P.S. provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and came into effect on April 30, 2014. All planning decisions "shall be consistent with" the P.P.S. (*Planning Act*, R.S.O. 1990, P. 13 s. 3). It should also be noted that s. 4.4 of the P.P.S. establishes that the P.P.S. is to be read in its entirety and all relevant policies are to be applied to each situation.

2.2 Growth Plan for the Greater Golden Horseshoe

The Growth Plan, which was created under the *Places to Grow Act, 2005*, was updated in May, 2019. It sets out where and how growth will occur across the G.G.H. to 2041 and all planning decisions shall conform to it. The Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. Relevant aspects of the Growth Plan, 2019 for this study include the following:

Managing and Directing Growth

- Growth will be directed to settlement areas, and within settlement areas it will be focused on strategic growth areas, locations where higher-order transit exists or is planned, and areas with existing or planned public services facilities.
- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential with convenient access to local stores, services and public service facilities.
- Municipalities should plan for a diverse range and mix of housing options, including second units and affordable housing, to accommodate people at all

stages of life, and to accommodate the needs of all household sizes and incomes.

- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of mixed-use, transit-supportive, pedestrian-friendly urban environments.
- In general, the development of Employment Areas should be transit-supportive and compact, and should minimize surface parking.
- Municipalities should preserve lands within settlement areas in the vicinity of major highway interchanges, ports, rail yards and airports for manufacturing and associated retail, office and ancillary facilities where appropriate.

Minimum Intensification Targets[1]

- New minimum intensification targets, the minimum percentage of all residential development occurring annually within the delineated B.U.A., have been created for upper-tier and single-tier municipalities in the G.G.H. There are two geographic groups for intensification targets. Haldimand County is in an intensification target group that requires municipalities, by the time the M.C.R. is approved and in effect, to set a local target of the minimum percentage of all residential development occurring annually within the B.U.A. This target set by the municipality must be based on maintaining or improving upon the minimum intensification target contained in the applicable upper- or single-tier official plan.[2]
- The minimum intensification target contained in the Haldimand Official Plan is 32% of new dwellings to be accommodated annually through intensification after 2015.[3]
- It is important to note that all upper-tier and single-tier municipalities have the ability to apply for alternative targets.

[1] Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.2.
[2] The built-up area is based on the Growth Plan for the Greater Golden Horseshoe, 2019.
[3] Haldimand County Official Plan, Ministry Approved June 8, 2009, policy B.5, p. 56.

Minimum Greenfield Density Targets[1]

- New minimum density targets have been created for the horizon of the Growth Plan, 2019 for G.G.H. upper-tier and single-tier municipalities and include two geographic groups. It is important to note that the greenfield density targets established in the Growth Plan, 2019 do not include employment lands.[2] Haldimand County is in the lower-density target group, which is required to plan for 40 people and jobs per gross ha by 2041, as summarized below:

  a) The Cities of Barrie, Brantford, Guelph, Hamilton, Orillia and Peterborough and the Regions of Durham, Halton, Niagara, Peel, Waterloo and York will plan to have a minimum designated greenfield area density target of 50 people and jobs per gross ha.[3]

  b) The City of Kawartha Lakes and the Counties of Brant, Dufferin, Haldimand, Northumberland, Peterborough, Simcoe and Wellington will plan to have a minimum designated greenfield area density target of 40 people and jobs per gross ha.[4]

- All upper-tier and single-tier municipalities have the ability to apply for alternative targets.
- The density target in the Haldimand County Official Plan is based on a blended average density of 29 persons and jobs per hectare within D.G.A.s of Community Areas and Employment Areas. This assumes a minimum density of 46 persons and jobs per hectare for new residential applications within the D.G.A. and a minimum density of 15 jobs per hectare for the Employment Area component of the D.G.A. As previously discussed, in accordance with the Growth Plan, 2019, the designated greenfield density target is to be based on development within the D.G.A. excluding Employment Areas.[5]

[1] Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.
[2] As per the Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.7.
[3] Ibid., section 2.2.7.
[4] Ibid., section 2.2.7.
[5] Haldimand County Official Plan, Ministry Approved June 8, 2009, policy B.6, p. 54.

Employment[1]

- According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within the settlement area. The density targets are to reflect the current and anticipated type and scale of employment that characterizes the Employment Area to which the target applies. Further, the minimum employment density target reflects opportunities for the intensification of Employment Areas on sites that support active transportation and are served by existing or planned transit.[2]
- As part of the Growth Plan, 2019, the Province will allow for small employment land conversions (less than 40 ha/99 acres) in advance of an M.C.R., while ensuring protections are in place to safeguard key Employment Areas as needed.
- The conversion of employment lands to a designation that permits non-employment is allowed in advance of an M.C.R., provided that:
    - there is a need;
    - the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
    - the municipality will maintain sufficient employment lands to accommodate forecast employment growth to the horizon of this Plan;
    - there are no adverse effects on the viability of an Employment Area or achievement of minimum intensification targets; and
    - there are existing or planned services in place.[3]
- The Province has identified key Employment Areas as Provincially Significant Employment Zones (P.S.E.Z.s) that are not to be converted regardless of land area size prior to the M.C.R. without a more comprehensive assessment approved by the Province. It is important to note that P.S.E.Z. can be reviewed by the Province at any time. The Lake Erie Industrial Park in Nanticoke is the only Employment Area in Haldimand County that has been identified by the Province as a P.S.E.Z. Identified P.S.E.Z. are mapped through a web portal (i.e.

[1] Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.
[2] Ibid., section 2.2.5.
[3] Ibid., section 2.2.5.

there are no schedules in the Growth Plan, 2019).[1] It should be noted that the Lake Erie Industrial Park in Nanticoke is not within a settlement area of Haldimand County and, as a result, is not included in the urban land needs assessment.

Strategic Growth Areas[2]

- Urban Growth Centres (U.G.C.s) and Major Transit Station Areas (M.T.S.A.s) are recognized in the Growth Plan, 2019 as regional focal points for accommodating population and employment growth. The Growth Plan, 2019 has not identified a U.G.C. or M.T.S.A. within Haldimand County. Municipalities are encouraged, however, to make better use of land and infrastructure by prioritizing intensification and direct growth to areas with existing or planned public service facilities and to strategic growth areas that include brownfield and greyfield sites, as well as other sites with planned or existing transit.[3]
- In addition to facilitating intensification throughout the B.U.A. of the urban areas, the Haldimand County O.P. directs intensification and/or encourages higher density development to the following areas:
    - The downtowns and mix-use areas of Caledonia, Cayuga, Dunnville, Hagersville, Jarvis and Townsend;
    - Two intensification corridors, Argyle Street in Caledonia and Main Street in Dunnville, and
    - Minor intensification in stable residential areas that respects and reinforces stability.[4]

[1] Provincially Significant Employment Zones Portal, https://www.placestogrow.ca/AGOL/AccessibleViewer/?appid=9ea7adaecc7e4a54a8b5a9e61444e2c0, accessed May 16, 2019.
[2] Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.4.
[3] Ibid., section 2.2.1.
[4] Haldimand County Official Plan, Ministry Approved June 8, 2009, policy B.7, p. 54-55.

Settlement Area Boundary Adjustments and Expansions[1]

- Municipalities are allowed to undertake settlement area boundary expansions that are no larger than 40 ha (approximately 99 acres) outside of the M.C.R. process, subject to criteria.
- Settlement area boundary adjustments are permitted outside of an M.C.R., provided that there is no net increase in land within settlement areas, subject to criteria.
- The requirement of the previous Growth Plan (Growth Plan, 2017) to de-designate excess lands when undertaking settlement area boundary expansions is not included in the Growth Plan, 2019.
- The Growth Plan, 2019 places emphasis on a more outcome-focused approach to urban boundary expansions, rather than specifying types of studies required to justify the feasibility and location of expansions.

Population and Employment Forecasts[2]

- The Growth Plan, 2019 provides population and employment forecasts for upper-tier and single-tier municipalities which will apply throughout a municipal comprehensive review. Figure 1-2 summarizes the population and employment forecasts for Haldimand County. Haldimand County had approximately 46,800 people[3] and 18,000 jobs in 2016. As summarized below, Haldimand County is forecast to reach a population of approximately 57,000 by 2031 and 64,000 by 2041, adding approximately 10,200 people and 17,200 people by 2031 and 2041, respectively. With respect to employment, by 2031 the County is forecast to reach 22,000 jobs and 25,000 jobs by 2041, adding approximately 4,000 jobs and 7,000 jobs by 2031 and 2041, respectively.

[1] Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.8.
[2] Ibid., section 2.2.4.
[3] 2016 population and employment figures are rounded. 2016 population base includes a Census undercount adjustment of approximately 2.6%.

Figure 2-1
Growth Plan Population and Employment Projections

	Growth Plan, 2019 Forecast*					
Haldimand County	Population			Employment		
	2031	2036	2041	2031	2036	2041
	57	60	64	22	24	25
	Annual Growth Rates**					
	2016-2031	2016-2036	2016-2041	2016-2031	2016-2036	2016-2041
	0.7%	0.9%	1.2%	0.8%	1.2%	1.3%

*Figures shown represent thousands (i.e. 000s).
**Growth rate is based on 2016 population of 46,800 and 2016 employment of 18,000.

2.3 Land Needs Assessment Methodology

On May 4, 2018 the M.M.A.H. released the final methodology for land needs assessment in the G.G.H. in accordance with the Growth Plan, 2019. Upper- and single-tier municipalities in the G.G.H. are required to use this methodology to assess the quantity of land required to accommodate forecast growth in conformity with the policies in the Growth Plan, 2019.

The L.N.A. Methodology identifies that the results of a land needs assessment can only be implemented through an M.C.R. As previously stated, an M.C.R. is a new O.P. or an Official Plan Amendment (O.P.A.) initiated by an upper- or single-tier municipality under section 26 of the *Planning Act* that comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. Methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

> “**Community Areas**: Areas where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment land employment jobs. Community areas include *delineated built-up areas* [B.U.A.] and the *designated greenfield area* [D.G.A.] (excluding *employment areas*).

> "**Employment Areas**: Areas where most of the employment land employment (employment in industrial-type buildings) jobs are, as well as some office jobs and some population-related jobs, particularly those providing services to the *employment area*. *Employment areas* (including *prime employment areas*) may be located in both *delineated built-up areas* [D.G.A.] and the *designated greenfield area* [D.G.A.]."[1]

In total, the L.N.A. Methodology provides six key respective steps to establishing Community Area and Employment Area land needs.

2.4 Draft Guidance Documents

In March, 2018, M.M.A.H. released two draft guidance documents for public consultation to support implementation of the Growth Plan, 2017 for the G.G.H. This included a document titled, "The Municipal Comprehensive Review Process," as well as a second document titled, "Application of the Intensification and Density Targets."

These draft guidance documents have been prepared by the Province to assist municipal planning practitioners, municipal Councils, members of the public, stakeholders, First Nations and Metis communities and other decision-makers with a better understanding the policies of the Growth Plan, 2017. Each draft guidance document respectively addresses the technical criteria and approaches related to the implementation of the M.C.R. process and application of the intensification and density targets.[2,3]

[1] Lands Needs Methodology for the Greater Golden Horseshoe, May 2018, p. 14.
[2] Draft Guidance to Support Implementation of the Growth Plan for the Greater Golden Horseshoe, 2019. The Municipal Comprehensive Review Process. Draft for Consultation March 2018. Ontario Ministry of Municipal Affairs.
[3] Ibid.

Chapter 3
Haldimand County Urban Land Supply

3. Haldimand County Urban Land Supply

This chapter summarizes both urban residential and non-residential land supply as of 2018 in Haldimand County. The first part of this chapter provides an analysis of the County's potential future housing unit supply by planning policy area (i.e. B.U.A. and D.G.A.) and planning application status,[1] while the latter part of this chapter reviews the County's potential future employment land supply on vacant designated urban lands.

The reference to urban areas[2] herein refers to the urban communities identified in the Haldimand County O.P., as follows:

- Caledonia
- Hagersville
- Cayuga
- Townsend
- Jarvis
- Dunnville

These urban areas have an urban boundary and a built boundary as delineated by the Province.[3] Lands within the built boundary of an urban area are referred to as the built-up area (B.U.A.), while lands outside the built boundary of an urban area are referred to as the Designated Greenfield Area (D.G.A.). The B.U.A. and D.G.A. are collectively referred to as planning policy areas throughout this report, as they are identified areas in the Haldimand County Official Plan with specific growth management policies[4] that have specific growth targets in accordance to the Growth Plan, 2019.

The reference to rural areas herein refers to the areas that do not have a defined urban boundary and include various hamlets, resort residential nodes and rural industrial areas within the County. The Strategic Employment Area (as defined in the Haldimand

[1] Housing potential has been summarized according to the following: in the planning process (registered but not built, draft approved and application under review/ consideration), vacant designated greenfield lands with no active application and potential intensification opportunities with no active applications.
[2] As shown on Schedule A of the Haldimand County Official Plan.
[3] As delineated in the Growth Plan for the Greater Golden Horseshoe, 2019.
[4] Identified in schedules B.1 through B.6.

County O.P.) consisting of the Nanticoke Industrial Area and the associated Industrial Influence Area[1] is considered as part of the County's rural area herein.

3.1 Haldimand County Total Urban Housing Supply Potential

Figure 3-1 summarizes the County's potential future housing supply by the B.U.A. and D.G.A. This inventory identifies housing units that are within the development approvals process, vacant designated greenfield lands with no active applications, as well as potential intensification and infill opportunities. For additional details regarding the potential housing supply by urban community, please refer to Appendix A. Approximately 86% of the County's estimated potential housing supply is in the D.G.A., while the remaining 14% is located in the B.U.A. Other key observations include:

- In the B.U.A. approximately 69% of the potential housing supply is comprised of high-density housing, mainly medium and longer-term intensification opportunities that have been identified within the County as part of this review. The remainder of the potential housing supply in the B.U.A. is comprised of approximately 20% medium-density and 11% low-density housing.
- Conversely, in the D.G.A. 75% of the potential housing supply identified is low-density housing. The remainder of the housing supply is comprised of approximately 14% medium-density and 11% high-density housing.
- County-wide, the D.G.A. accounts for 98% of the total urban low-density housing supply, 81% of the total medium-density housing supply, and 50% of the total high-density housing supply.
- Of the County's total future urban housing supply, approximately 38% of housing unit potential has been identified within the development approvals process, while the remaining 62% of the County's urban housing supply falls within vacant designated residential lands and intensification opportunities that have no active applications at this time.

[1] Identified in the Haldimand County Official Plan, p. 71.

Figure 3-1
Haldimand County
Potential Urban Housing Units by Status

Haldimand County				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	69	22	0	91
Draft Plan Approved	41	14	0	55
Application Under Review	14	30	116	160
Vacant Lands	8	0	0	8
Additional Intensification	93	362	1,363	1,818
Total Built Up Area	**225**	**428**	**1,479**	**2,132**
Unit Mix	11%	20%	69%	100%
Designated Greenfield Area	Low	Medium[1]	High[2]	Total
Registered Not Built	314	126	0	440
Draft Plan Approved	3,567	316	266	4,149
Application Under Review	300	345	358	1,003
Vacant Lands	5,829	1,088	854	7,771
Additional Intensification	0	0	0	0
Total Greenfield	**10,010**	**1,875**	**1,478**	**13,363**
Unit Mix	75%	14%	11%	100%
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	383	148	0	531
Draft Plan Approved	3,608	330	266	4,204
Application Under Review	314	375	474	1,163
Vacant Lands	5,837	1,088	854	7,779
Additional Intensification	93	362	1,363	1,818
Total Haldimand County	**10,235**	**2,303**	**2,957**	**15,495**
Unit Mix	66%	15%	19%	100%

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

3.2 Housing Intensification Potential

The term intensification is used in a number of different ways. It is important as a basis for this assessment that a common understanding of the term and related terminology be established.

A range of different terms is used to describe intensification, in particular "redevelopment" and "infill." The County, however, is required to be consistent with the P.P.S. and to conform to the Growth Plan. The definitions in those two documents, therefore, take precedence over any others.

Both policy documents define intensification, redevelopment and brownfield sites as follows:

> "Intensification
>
> The development of a property, site or area at a higher density than currently exists through:
>
> a. redevelopment, including the reuse of brownfield sites;
>
> b. the development of vacant and/or underutilized lots within previously developed areas;
>
> c. infill development; or
>
> d. the expansion or conversion of existing buildings."[1]
>
> "Redevelopment
>
> The creation of new units, uses or lots on previously developed land in existing communities, including brownfield sites."[2]

[1] Provincial Policy Statement 2014, p. 43; and Growth Plan for the Greater Golden Horseshoe, 2019, p. 73-74.
[2] Growth Plan for the Greater Golden Horseshoe, 2019, p. 80.

"Brownfield Sites

Undeveloped or previously developed properties that may be contaminated. They are usually, but not exclusively, former industrial or commercial properties that may be underutilized, derelict or vacant."[1]

The Growth Plan has identified areas of focus for intensification, these areas are referred to as Strategic Growth Areas and are defined as:

"Strategic growth areas

Within settlement areas, nodes, corridors, and other areas that have been identified by municipalities or the Province to be the focus for accommodating intensification and higher-density mixed uses in a more compact built form. Strategic growth areas include urban growth centres, major transit station areas, and other major opportunities that may include infill, redevelopment, brownfield sites, the expansion or conversion of existing buildings, or greyfields. Lands along major roads, arterials, or other areas with existing or planned frequent transit service or higher order transit corridors may also be identified as strategic growth areas."[2]

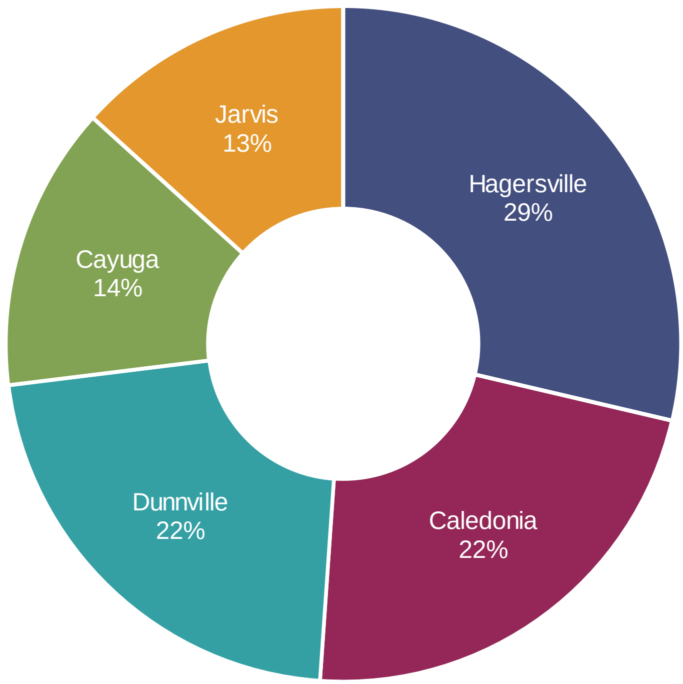
Short- and long-term residential intensification sites were identified by Haldimand County and a detailed list can be found in Appendix A. As part of this review, intensification sites were identified as being larger or equal to approximately 1.6 ha (4 acres) and have a gross to net coverage of 75% to accommodate future roads and/or additional infrastructure. Based on our review of existing residential density trends in Haldimand County and other comparable urban centres in the broader region, an overall average density of 82 units per ha[3] (33 units per acre) has been assumed.

Figure 3-2 summarizes the share of intensification potential by urban area. County-wide, approximately 1,820 housing units have been identified for potential intensification (see Figure 3-1); of this total, Hagersville has the largest supply, comprising of 29% of the County's residential intensification total. Following Hagersville, Caledonia and

[1] Growth Plan for the Greater Golden Horseshoe, 2019, p. 75.
[2] Ibid., p. 93.
[3] For urban centres with a population of less than 25,000 people assuming the following residential densities: 8 units per acre for low density, 15 units per acre for medium density, and 40 units per acre for high density.

Dunnville each make up 22% of the County's residential intensification total. It should be noted that there is no residential intensification potential identified for Townsend.

Figure 3-2
Haldimand County
Share of Intensification Potential by Urban Area



Source: Data provided by Haldimand County Planning Department summarized by Watson & Associates Economists Ltd., 2019.

3.3 Designated Lands in the Greenfield Area by Urban Area

3.3.1 Potential Community Land Supply by Urban Area

Under the L.N.A. Methodology for the G.G.H., Community Areas[1] are defined as:

> Areas where the vast majority of housing required to accommodate forecasted population will be located, as well as the majority of population-related jobs, most office jobs and some employment land employment

[1] Places to Grow, Land Needs Assessment Methodology for the Greater Golden Horseshoe, December 2017.

jobs. Community areas include delineated built-up areas and the designated greenfield area (excluding employment areas).

Figure 3-3 summarizes the land area (reported in hectares) in the D.G.A. by urban area, while Figure 3-4 summarizes the share of D.G.A. by urban community. Key observations include:

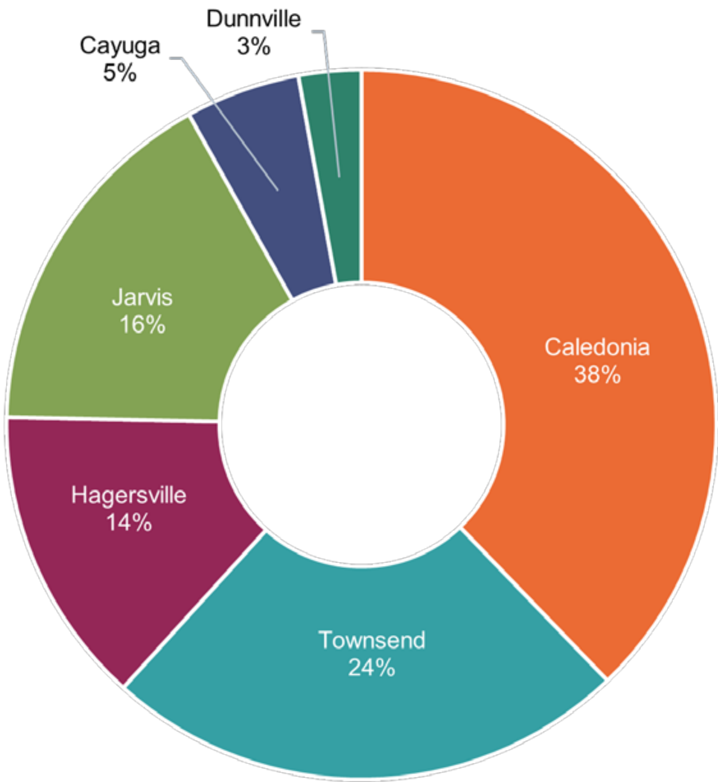
- In total, there are 923 gross ha (2,280 acres) of community lands in the D.G.A. Of that total, roughly 240 ha (590 acres) are identified as natural environmental features. Removing these environmental features, Haldimand County has a total of 683 ha (1,690 acres) of urban designated community lands.
- Of the total designated community lands in the D.G.A., 655 ha (1,620 acres), representing approximately 96%, are identified as residential, and the remaining 29 ha (70 acres), approximately 4%, are identified as non-residential.
- Caledonia accounts for the largest share of community lands in the D.G.A., accounting for approximately 38%, 258 ha (640 acres) of Haldimand County's overall total D.G.A. community land area. Following Caledonia, Townsend has the second largest supply of community land in the D.G.A. with 163 ha (403 acres), representing 24% of the total community lands in Haldimand.

Figure 3-3
Haldimand County
Land Area in the Designated Greenfield Area (Community Area)

Urban Area	Community Area: Designated Greenfield Area (ha)				
	Total Community Area D.G.A. Land Area (A)	Environmental Features (B)	Gross Land Area Adjusted for Environmental Features (A-B)	Gross Land Area Adjusted for Environmental Features by Designated Type	
				Non-Residential[1]	Residential
Caledonia	371	113	258	15	243
Townsend	169	6	163	11	152
Hagersville	164	71	93	0	93
Jarvis	118	5	113	0	113
Cayuga	45	9	36	2	34
Dunnville	57	37	20	0	20
Urban Area Total	**923**	**240**	**683**	**29**	**655**

Source: Watson & Associates Economists Ltd., 2019.
[1] Excludes lands that are designated as Employment Areas (as identified in Schedule I of Haldimand County's Official Plan).

Figure 3-4
Haldimand County
Share of the Designated Greenfield Area (Community Area)



Source: Watson & Associates Economists Ltd., 2019.

Figure 3-5 summarizes the community lands that are in the D.G.A. by stage of development. In total, there are 683 ha (1,690 acres) of designated lands in the D.G.A. Of this total, currently 295 ha (730 acres), or approximately 43%, are currently occupied or within the development process, while the remainder of these community lands, 388 ha (950 acres) in the D.G.A., are vacant. It is noted that occupied land area is based on both residential and non-residential building permit data between 2016 and 2018 provided by Haldimand County. The development approvals category includes registered but unbuilt, draft planned approved, other applications that are currently in the development approvals process in the D.G.A. For a detailed summary of the community lands in the D.G.A., please refer to Appendix A.

Figure 3-5
Haldimand County
Summary of Designated Lands in Greenfield Areas (Community Areas)

Status	Community Area - Designated Greenfield Area			
	Residential (ha)	Non-Residential [1] (ha)	Total (ha)	Share of Total Inventory
Occupied	57	1	58	8%
Development Approvals[3]	231	6	237	35%
Vacant (No Active Applications)	366	22	388	57%
Total Urban Area	**655**	**29**	**683**	100%
	96%	**4%**	**100%**	

Source: Watson & Associates Economists Ltd., 2019.
[1] Excludes lands that are designated Employment Areas (as identified in Schedule I of Haldimand County's Official Plan).
[2] Based on a review of recent land absorption averaging 1 ha annually between 2006 to 2016.
[3] Includes lands that are currently within the development process (identified by Haldimand County Planning Department).

3.4 Haldimand County Employment Area

Under the Land Needs Methodology, Employment Areas[1] are defined as:

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

It is important to note that while population growth occurs in Community Areas (discussed in section 3.3), employment growth can occur in both Community and Employment Areas. The primary use of employment land in Haldimand County is to accommodate industrial development. As identified in the County's O.P. (section C.1.23, and Schedule I.1 to 1.5), Haldimand County has four separate classifications for industrial employment lands:

- Major Industrial;
- Industrial;

[1] Places to Grow. Land Needs Methodology for the Greater Golden Horseshoe (G.G.H.). Ontario. 2018. p. 14.

- Urban Business Parks; and
- Rural Industrial.

These lands are further classified by Haldimand County as core employment lands and non-core employment lands. Non-core employment lands include designated business parks and permit a wide-range of non-industrial uses, including retail uses. These lands are typically parcels fronting a major arterial road, or along the fringe of an established industrial area. The remaining designated employment lands are considered core employment lands and accommodate traditional employment land uses. Rural industrial uses are not included in the inventory; however, it is important to note that the rural industrial areas accommodate a large share of employment within the County and are briefly discussed in Chapter 4.

3.4.1 Potential Employment Land Supply by Urban Area

This following section summarizes the supply of gross designated employment land by urban area within Haldimand County. In generating this inventory, all parcels designated in the County's O.P. as Employment Areas (identified in Schedules I.1 through I.5) have been reviewed. The analysis was completed primarily through a desktop review using geographic information systems (G.I.S.) mapping software, as well as data on vacant developable employment land provided by the Haldimand County Planning staff. Spatial overlays were utilized to develop the land supply inventory, including parcel fabric, land-use layers (including the Haldimand County Official Plan Schedules I.1, I.2, I.3, I.4 and I.5), non-building footprints, hydrology/ wetlands, hazard lands and orthophotos. Employment lands are considered developed if a building permit has been issued for a development on a site as of September, 2018.

It is important to note that there have been some changes to the designated urban employment land supply that are not reflected in the County's O.P. These changes include:

- An Official Plan and Zoning Amendment to facilitate the development of an urban business park (Non-Core Employment Area) to the urban area of Cayuga (south of Mohawk Street East) approximately 6 net ha (15 net acres).[1] The southeastern portion of this site has already been developed.[2]

- The last remaining vacant designated employment lands within the Hagersville urban area of approximately 16 net ha (40 net acres) is proposed to join the Six Nations Reserve. These lands are located in the northwest quadrant of the urban area of Hagersville and are identified in Figure 3-9e.

Based on discussions with the Haldimand County planning staff, the Georgia-Pacific Site (identified on Figure 3-9a) in Caledonia is primarily considered non-developable with limited opportunity for redevelopment/development. These lands are currently not occupied, as Georgia-Pacific Canada has closed operations on this site. A large portion of the area has been identified as “undermined” by the County and has not been included in the designated land inventory and in the employment land density calculation.

The employment land supply has been carried out in accordance with the guidelines in the Growth Plan, 2019 and the L.N.A. Methodology. As summarized in Figure 3-7, Haldimand County had approximately 408 gross ha (1,000 gross acres) of designated urban employment land as of January 1, 2018. Approximately 67% of the urban designated employment land is vacant, as summarized in Figure 3-7. The urban vacant designated employment lands total approximately 272 gross ha (670 gross acres).

Figures 3-6 through 3-8 summarize the share of urban designated employment lands by urban community. Figures 3-9a through 3-9e illustrate the location of the urban designated employment land supply on maps. Key observations include:

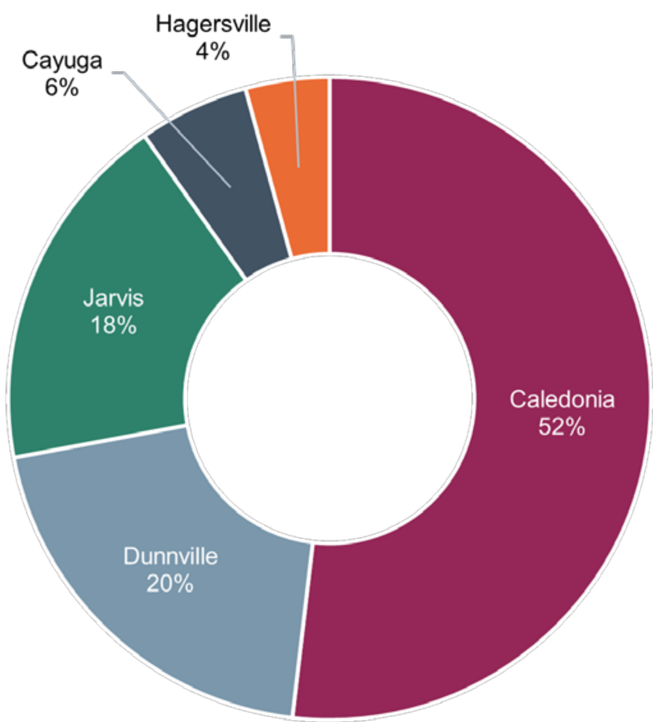
- As summarized in Figures 3-6 and 3-7, of the 408 gross ha (1,000 acres) of designated employment lands in the urban areas of Haldimand County, approximately 52% of the total inventory is located in the northern part of Caledonia. Following Caledonia, Dunnville has the second largest inventory of designated employment lands, comprising 20% of the total urban inventory. The remainder of the designated employment lands are distributed between Jarvis,

[1] Haldimand County, By-law 1061-HC/18. Staff Report PED-PD-12-2018, February 27, 2018.
[2] Approximately 1 net ha (2.5 net ha).

Cayuga and Hagersville each comprising 18%, 6% and 4%, respectively, of the total urban inventory.

- As summarized in Figure 3-8, the urban designated land supply is comprised of 75% Core Employment Lands and 25% Non-Core Employment Lands.
- The Caledonia urban area represents approximately 55% of the vacant employment land supply within the County, followed by the urban areas of Jarvis, Dunnville and Cayuga at 25%, 14% and 6%, respectively.

Figure 3-6
Haldimand County
Share of Designated Urban Employment Lands (Employment Areas)



Source: Watson & Associates Economists Ltd., 2019.
Excludes Environmental features and other hazard lands.

Figure 3-7
Haldimand County
Employment Lands by Urban Employment Area

Urban Areas	Designated Gross Urban Employment Land Area (ha)[1]			
	Occupied Employment Lands	Vacant Employment Lands	Total Designated Employment Lands	Share of County-Wide Urban Designated Employment Land (%)
Caledonia	63	149	212	52%
	30%	70%	100%	
Jarvis	5	69	74	18%
	7%	93%	100%	
Dunnville	44	39	83	20%
	53%	47%	100%	
Cayuga	7	16	23	6%
	32%	68%	100%	
Hagersville	17	0	17	4%
	0%	0%	0%	
Townsend	0	0	0	0%
	0%	0%	0%	
Total Urban Employment Land	**136**	**272**	**408**	**100%**
	33%	**67%**	**100%**	

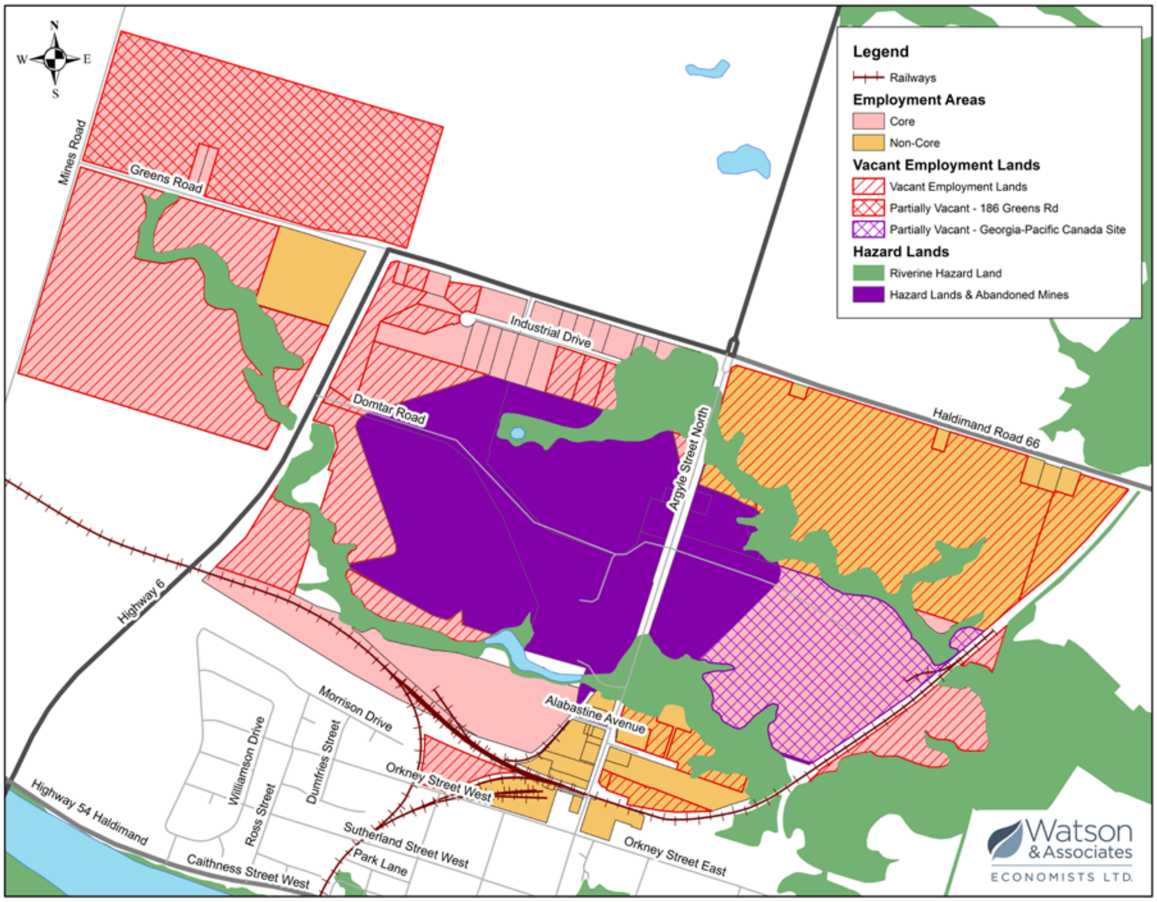
Source: Occupied land based on desktop review by Watson & Associates Economists Ltd. Occupied parcels are based on a gross land area to account for internal infrastructure and rights-of-way (upward adjustment of 20%). Gross vacant land derived from data provided from Haldimand County Planning Staff for Growth Management Strategy Council Presentation, April 2018. All figures exclude environmental features and hazard lands.

Figure 3-8
Haldimand County
Vacant Employment Lands by Urban Employment Area Designation Type

Urban Areas	Vacant Gross Urban Employment Land Area (ha)[1]			
	Core Employment Areas	Non-Core Employment Areas	Total Employment Areas	Share of County-Wide Urban Vacant Employment Land (%)
Caledonia	99	50	149	55%
	66%	34%	100%	
Jarvis	61	8	69	25%
	88%	12%	100%	
Dunnville	33	6	39	14%
	85%	15%	100%	
Cayuga	13	3	16	6%
	81%	19%	100%	
Hagersville	0	0	0	0%
	0%	0%	0%	
Townsend	0	0	0	0%
	0%	0%	0%	
Total Urban Employment Lands	**205**	**67**	**272**	**100%**
	75%	**25%**	**100%**	

Source: Derived from data summarized by Haldimand County Planning Staff for Growth Management Strategy Council Presentation, April 2018.

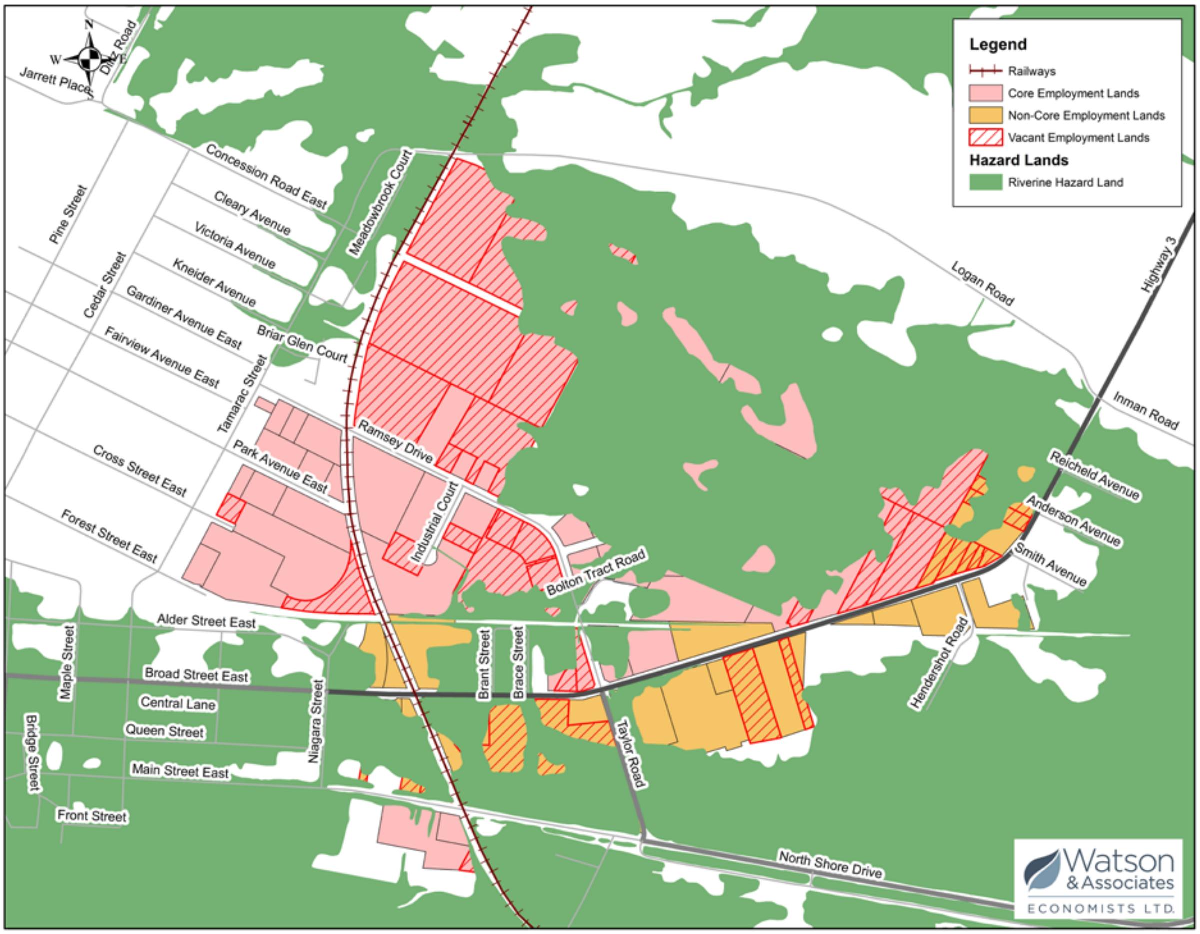
Figure 3-9a
Haldimand County
Caledonia Employment Lands



Source: Watson & Associates Economists Ltd. based on aerial imagery and Haldimand County G.I.S. parcel fabric and Official Plan layers.

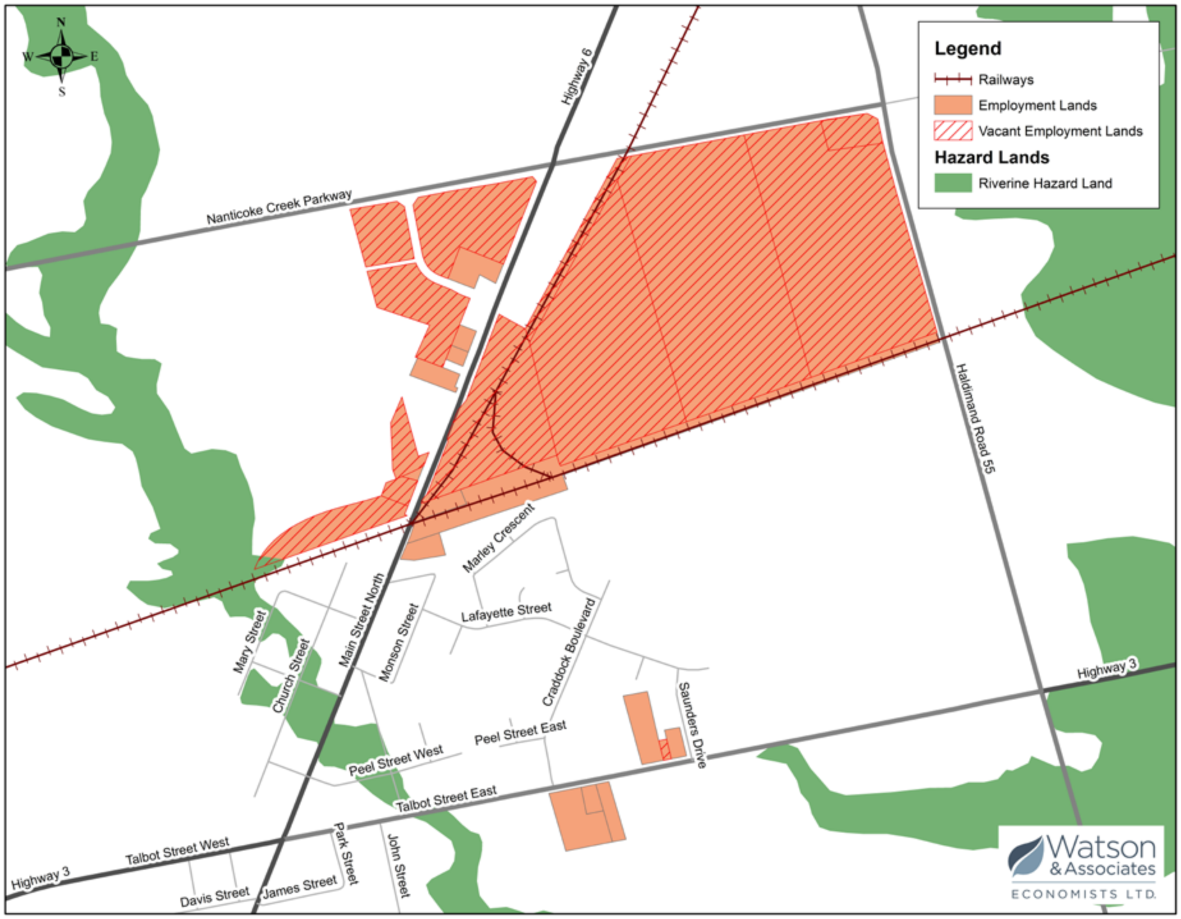
Notes: The majority of the Georgia-Pacific Canada site is considered non-developable and is identified in the purple cross-hatch. 186 Greens Road, a large site in the northeast quadrant of Mines Road and Greens Road is identified on the map as partially vacant this area as only a small portion of site is occupied.

Figure 3-9b
Haldimand County
Dunnville Employment Lands



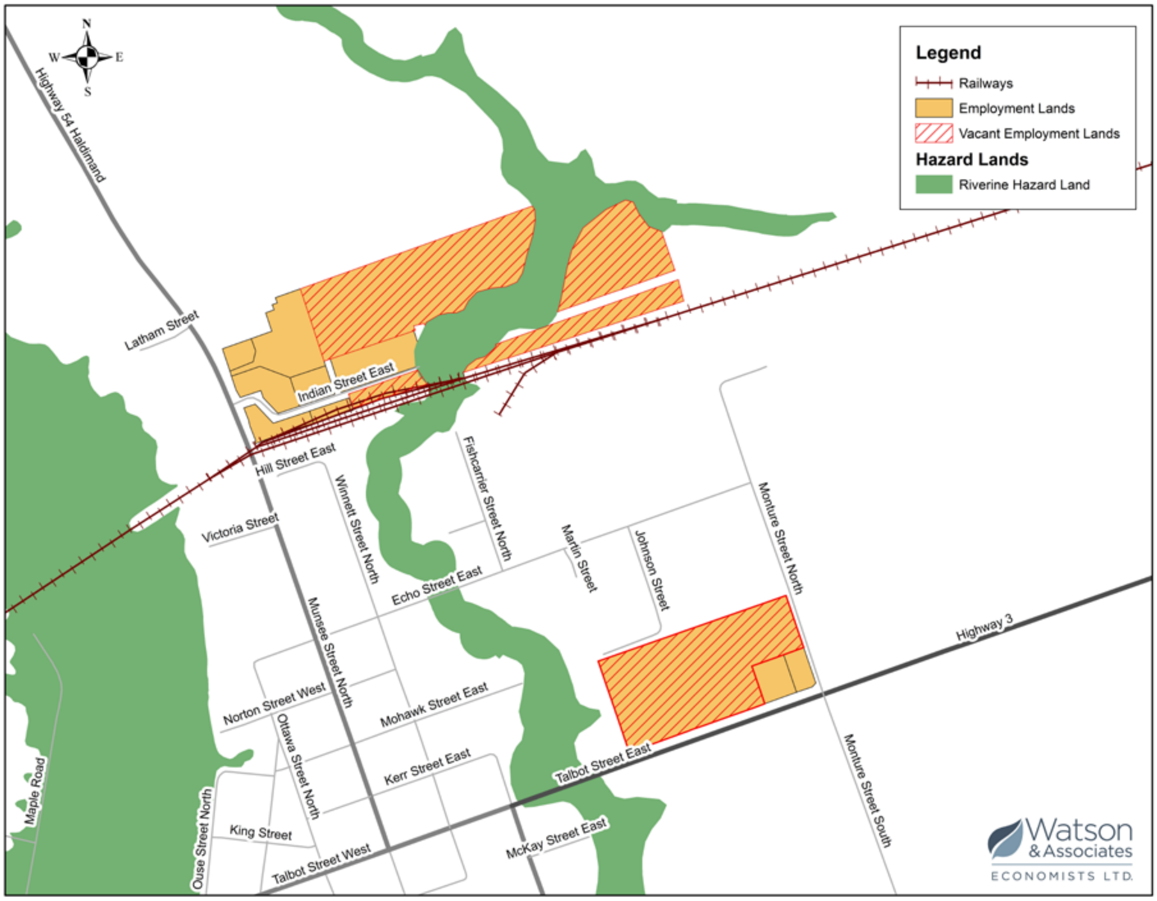
Source: Watson & Associates Economists Ltd. based on aerial imagery and Haldimand County G.I.S. parcel fabric and Official Plan layers.

Figure 3-9c
Haldimand County
Jarvis Employment Lands



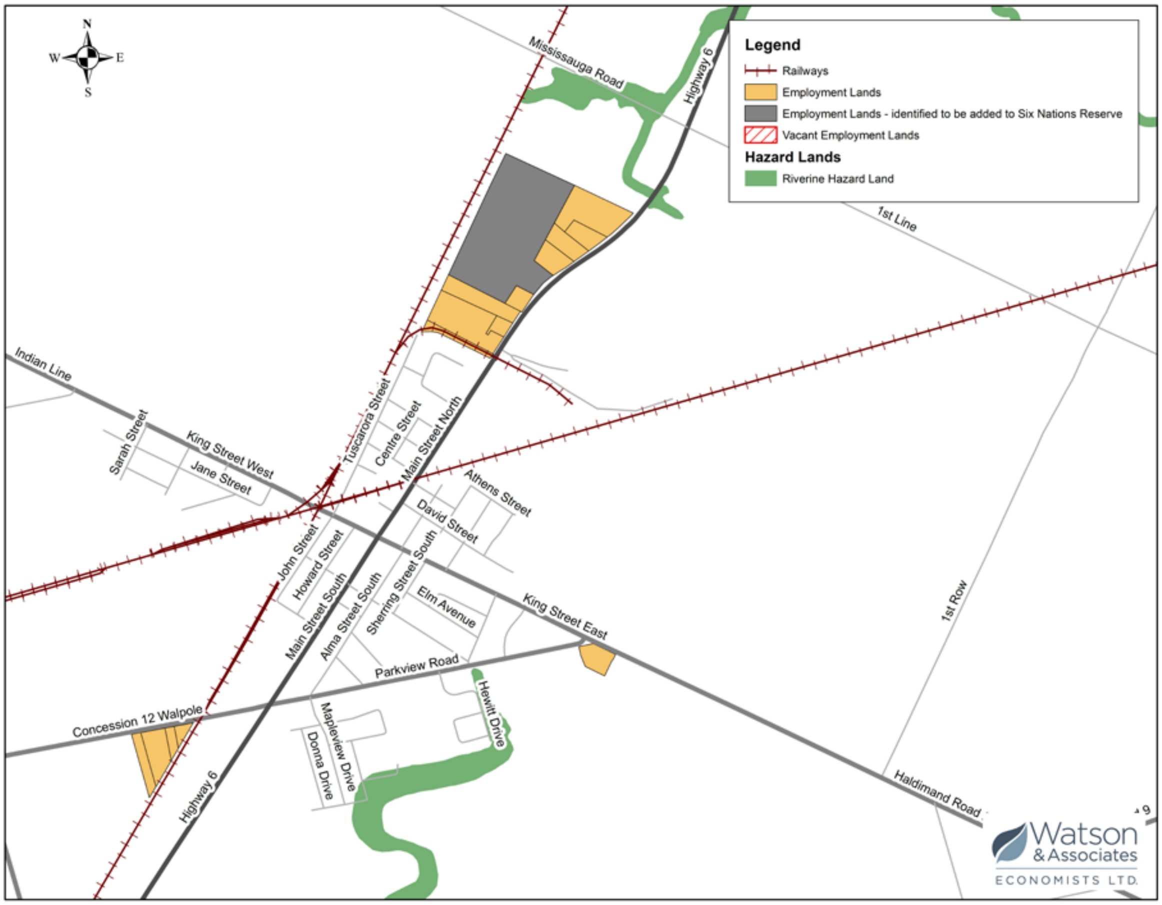
Source: Watson & Associates Economists Ltd. based on aerial imagery and Haldimand County G.I.S. parcel fabric and Official Plan layers.

Figure 3-9d
Haldimand County
Cayuga Employment Lands



Source: Watson & Associates Economists Ltd. based on aerial imagery and Haldimand County G.I.S. parcel fabric and Official Plan layers.
Note: The employment lands in the northwest quadrant of Talbot Street East and Monture Street North are lands that have been recently designated as employment lands.

Figure 3-9e
Haldimand County
Hagersville Employment Lands



Source: Watson & Associates Economists Ltd. based on aerial imagery and Haldimand County G.I.S. parcel fabric and Official Plan layers.

Chapter 4
Haldimand County Long-Term Forecast: Population, Housing and Employment

4. Haldimand County Long-Term Forecast: Population, Housing and Employment

This chapter summarizes the long-term population, household and employment forecasts for Haldimand County from 2016 to 2046 by urban area and remaining rural area. Haldimand County's population and employment forecast presented herein is consistent with the population and employment forecast outlined in Schedule 3 of the Growth Plan, 2019. For supplementary information regarding the components of population growth please refer to Appendix C. Additional details with respect to the population, housing and employment forecasts are provided in Appendix D.

4.1 Haldimand County Population and Housing Forecast

Figure 4-1 summarizes the recommended County-wide population and housing forecasts for the 2016 to 2046 period in comparison with recent historical trends over the 2001 to 2016 period. Key findings regarding the County-wide and urban area population and housing forecasts are summarized below:

- Haldimand's population is forecast to increase by 21,000 persons over the 30-year forecast period, growing from 46,800 in 2016 to 67,800 in 2046.[1] This represents an average annual population growth rate of approximately 1.2% or 700 persons per year;
- The County's housing base is forecast to grow from 17,510 in 2016 to 26,540 by 2046, representing an increase of approximately 9,000 units or 1.4% annually;
- The average number of persons per unit (P.P.U.) have declined in Haldimand County since 2001, falling from 2.92 in 2001 to 2.67 by 2016, largely driven by the aging of the population. Over the forecast period, it is expected that average P.P.U. levels will continue to decline, reaching 2.55 by 2046;
- Over the 2016 to 2046 forecast period, low-density housing (i.e. single and semi-detached) is expected to comprise the majority of new housing growth (61%), while the remainder of housing growth is anticipated to be geared towards

[1] Population figures include a net Census undercount estimated at approximately 2.6%. The Census undercount represents the net number of permanent residents who are missed (i.e. over-coverage less under-coverage) during Census enumeration in accordance with Statistics Canada.

medium- and high-density units, at 18% and 22%, respectively. Across the County, housing preferences by structure type are anticipated to gradually shift from low-density to medium-density and high-density housing forms over the long term. This shift will largely be driven by the aging of the County's population base and rising housing prices relative to household income. It is further noted that to adequately accommodate future housing demand across an increasingly diverse population base, a broader range of new housing typologies by built-form, tenure and affordability will be required across the County's urban areas.

Figure 4-1
Haldimand County
Population and Household Forecast, 2016 to 2046

	Year	Population (Including Census undercount)[1]	Excluding Census Undercount			Housing Units					Persons Per Unit (P.P.U.) with undercount	Person Per Unit (P.P.U.): without undercount
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings[2]	Apartments[3]	Other	Total Households		
Historical	*Mid-2001*	45,400	43,700	500	43,200	13,650	640	1,180	90	15,560	2.92	2.81
	Mid-2006	47,200	45,200	700	44,500	14,510	690	1,090	40	16,320	2.89	2.77
	Mid-2011	46,000	44,900	700	44,200	14,790	910	1,090	50	16,830	2.74	2.67
	Mid-2016	46,800	45,600	600	45,000	15,320	1,040	1,070	80	17,510	2.67	2.61
Forecast	*Mid-2021*	50,100	48,800	600	48,200	16,510	1,220	1,230	80	19,030	2.63	2.57
	Mid-2026	53,200	51,800	700	51,200	17,410	1,460	1,470	80	20,410	2.61	2.54
	Mid-2031	56,700	55,300	700	54,600	18,320	1,720	1,740	80	21,850	2.60	2.53
	Mid-2036	60,200	58,700	800	57,900	19,140	1,970	2,080	80	23,260	2.59	2.52
	Mid-2041	64,100	62,500	800	61,700	19,960	2,290	2,540	80	24,870	2.58	2.51
	Mid-2046	67,800	66,100	800	65,200	20,800	2,630	3,040	80	26,540	2.55	2.49
Incremental	**Mid-2001 to Mid-2006**	1,800	1,500	200	1,300	860	50	-90	-50	760		
	Mid-2006 to Mid-2011	-1,200	-300	0	-300	280	220	0	10	510		
	Mid-2011 to Mid-2016	800	700	-100	800	530	130	-20	30	680		
	Mid-2016 to Mid-2021	3,300	3,200	0	3,200	1,190	180	160	0	1,520		
	Mid-2016 to Mid-2026	6,400	6,200	100	6,200	2,090	420	400	0	2,900		
	Mid-2016 to Mid-2031	9,900	9,700	100	9,600	3,000	680	670	0	4,340		
	Mid-2016 to Mid-2036	13,400	13,100	200	12,900	3,820	930	1,010	0	5,750		
	Mid-2016 to Mid-2041	17,300	16,900	200	16,700	4,640	1,250	1,470	0	7,360		
	Mid-2016 - Mid-2046	21,000	20,500	200	20,200	5,480	1,590	1,970	0	9,030		

Source: Watson & Associates Economists Ltd., 2019.
[1] Census undercount estimated at approximately 2.6%. Note: Population including the undercount has been rounded.
[2] Includes townhouses and apartments in duplexes.
[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.
Note: Figures may not add up precisely due to rounding.

4.2 Haldimand County Population and Housing Growth Allocations

Figures 4-2, and 4-3 summarizes the population and housing forecasts by urban area and remaining rural area, which have been derived based on a review of residential supply and demand factors by local urban area, including:

Local Supply Factors:

- Supply of potential future housing stock in the development process by housing structure type and approval status;
- Housing intensification opportunities;
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process;
- A high-level review of identified water and wastewater servicing capacity and potential solutions to overcome constraints (where identified); and
- Provincial policy direction regarding forecast residential growth by urban and rural area.

Demand Factors:

- Historical population and housing activity by structure type based on 2001 to 2016 Statistics Canada (Census) data by urban area and remaining rural area;
- A review of historical residential building permit activity (new units only) by structure type from 2007 to 2018 by urban area and remaining rural area;
- Influence of population and employment growth within the surrounding market areas on the geographic distribution of growth and settlement patterns across the County;
- Market demand for housing intensification; and
- The County’s appeal to young adults, families and empty-nesters/seniors.

While population and employment growth rates vary significantly by urban area, each of the six urban areas share several relatively common attributes with respect to growth drivers and long-term development trends. These include:

- All the County’s urban areas are expected to experience housing growth over the long-term forecast period (as summarized in Figure 4-4);
- Average annual new housing construction is anticipated to increase from recent levels experienced over the past five years;
- Future housing growth will continue to be dominated by low-density housing forms; however, increasing market opportunities will exist for medium- and high-density housing as the local and provincial population base continues to age. Looking forward, this also has implications regarding the need for both seniors’ and affordable housing; and
- P.P.U. levels are forecast to steadily decline from 2016 to 2046.

A key underlying assumption of the growth allocations by urban area, as is the case with the overall County forecast relates to Haldimand’s proximity to Hamilton and the southwest portion of the G.T.H.A. Given Haldimand’s proximity to growing employment markets in the G.T.H.A., the County and, most notably, Caledonia are anticipated to attract steady new residential construction across a range of housing products by price and structure type.

Figures 4-2 through 4-4 summarize the total population, total households and the share of housing growth by urban community from 2016 to 2046. Based on regional demographic trends and identified local housing market potential, approximately 61% of County-wide housing growth has been allocated to Caledonia. As of 2016, Caledonia comprised approximately 21% of the County’s occupied housing base. By 2046, Caledonia is estimated to comprise 35% of the County’s total occupied housing base. Relative to historical trends, steady population growth is also forecast for the urban areas of Cayuga and Hagersville, while Dunnville, Jarvis and Townsend are anticipated to experience moderate to low population and housing growth levels over the next 30 years.

Despite steady historical housing growth in the remaining rural area of the County, both the percentage and absolute levels of future housing growth allocated to the rural area are forecast to decline in comparison to historical trends. From a market perspective, forecast demographic trends across the County and surrounding area suggest that the percentage share of future housing will continue to shift from the rural areas to the urban communities of the County, as new families are attracted to the County in search of affordably priced ground-oriented housing located within proximity to local urban amenities (i.e. schools, retail, personal service uses, etc.) and surrounding employment markets. To a lesser extent, housing demands from the 55-74 age group (empty-nesters/young seniors) and the 75+ age group (older seniors) are also anticipated to drive the future need for housing within proximity to urban amenities (i.e. shopping, entertainment, hospitals/health care) and other community infrastructure.

Figure 4-2
Haldimand County
Urban Population Forecast by Urban Area and
Remaining Rural Area, 2016 to 2046

Year	Population							
	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Remaining Rural	Haldimand County
2011	10,300	1,700	5,900	2,600	1,200	2,600	21,700	46,000
2016	10,900	1,900	6,100	3,100	1,000	2,000	21,800	46,800
2021	12,800	2,200	6,300	3,900	1,100	2,200	21,800	50,100
2026	14,900	2,400	6,500	4,500	1,100	2,300	21,600	53,200
2031	17,100	2,700	6,800	5,000	1,200	2,400	21,800	56,700
2036	19,300	2,900	7,000	5,500	1,200	2,500	22,000	60,200
2041	21,800	3,100	7,200	6,000	1,200	2,600	22,200	64,100
2046	24,500	3,300	7,400	6,500	1,300	2,700	22,300	67,800
2016-2031	6,200	800	700	1,900	200	400	0	9,900
2016-2041	10,900	1,200	1,100	2,900	200	600	400	17,300
2016-2046	13,600	1,400	1,300	3,400	300	700	500	21,000

Source: Watson & Associates Economists Ltd., 2019.
Note: Population figures include a net Census undercount estimated at approximately 2.6%.

Figure 4-3
Haldimand County
Urban Community Household Forecast by Urban Area and
Remaining Rural Area, 2016 to 2046

Year	Households							
	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Remaining Rural	Haldimand County
2011	3,520	680	2,500	1,060	400	900	7,780	16,830
2016	3,740	710	2,600	1,150	480	890	7,960	17,510
2021	4,550	820	2,750	1,440	500	920	8,070	19,030
2026	5,350	910	2,860	1,640	520	970	8,190	20,410
2031	6,220	1,010	2,960	1,840	540	1,010	8,300	21,850
2036	7,070	1,090	3,050	2,030	550	1,060	8,420	23,260
2041	8,110	1,180	3,140	2,230	570	1,110	8,540	24,870
2046	9,240	1,260	3,220	2,410	580	1,170	8,680	26,540
2016-2031	2,480	300	360	690	60	120	340	4,340
2016-2041	4,370	470	540	1,080	90	220	580	7,360
2016-2046	5,500	550	620	1,260	100	280	720	9,030

Source: Watson & Associates Economists Ltd., 2019.
Note: Numbers may not add up precisely due to rounding.

Figure 4-4
Haldimand County
Percentage Share of Housing Growth by Urban Area, 2016 to 2046

	2016 County Housing (%)	Percent of 2016-2046 County Housing Growth	2046 County Housing (%)
Caledonia	23%	61%	35%
Cayuga	4%	6%	5%
Dunnville	13%	7%	12%
Hagersville	7%	14%	9%
Townsend	2%	1%	2%
Jarvis	5%	3%	4%
Remaining Rural	46%	8%	33%
Haldimand County	100%	100%	100%

Source: Watson & Associates Economists Ltd., 2019.

4.3 Housing Forecast by Planning Policy Area

In accordance with the requirements of the provincial L.N.A. Methodology, the population, housing and employment forecast has also been allocated to planning policy areas. There are three main planning policy areas defined below in accordance with the Growth Plan, 2019:[1]

Delineated Built-Up Area (B.U.A.)

The limits of the developed urban area as defined by the Minister in consultation with affected municipalities for the purpose of measuring the minimum intensification target.

Designated Greenfield Area (D.G.A.)

Lands within settlement areas but outside delineated built-up areas that have been designated in an official plan for development and are required to accommodate forecasted growth to the horizon of this Plan. Designated greenfield areas do not include excess lands.

[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Definitions, p. 77.

Rural Lands

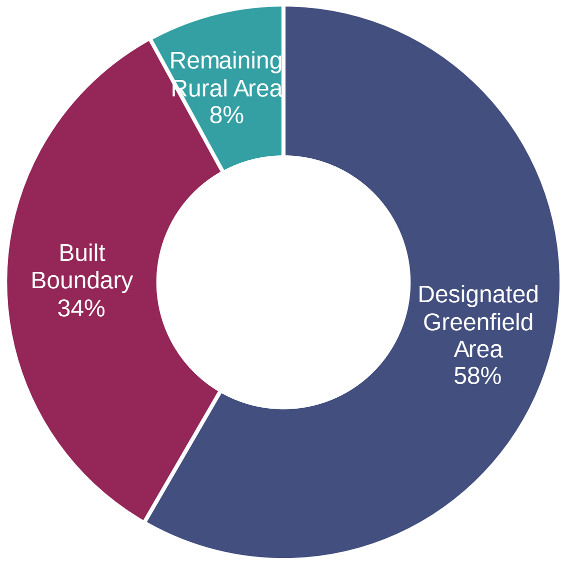
Lands which are located outside settlement areas and which are outside prime agricultural areas.[1]

Figure 4-5 summarizes the share of County-wide household forecast at 2046 by planning policy area, while Figure 4-6 provides a more detailed description of the incremental housing forecast by structure type and by policy area. The following observations are provided:

- From 2016 to 2041, the B.U.A. is forecast to accommodate 32% of the total households in Haldimand County. This forecast is consistent with Haldimand County's O.P. (Section 4.B.5), which identifies a target of 32% of new households between 2015 and 2031 through intensification as established through the 2006 Growth Plan conformity work completed by Haldimand County in 2009. While an alternative (reduced) target could be pursued under the Growth Plan 2019, the analysis presented herein has not focused on this potential outcome.
- As identified in Figure 4-5, the D.G.A. is anticipated to accommodate a large proportion of the County's total housing forecast. From 2016 to 2041, the D.G.A. is projected to accommodate approximately 58% of the County's total housing forecast, which represents approximately 4,400 housing units, or approximately 177 units per year; and
- The remainder of the County's housing forecast is allocated to the rural areas, which accounts for approximately 8% of the total housing forecast. All the housing growth in the rural area is anticipated to be low-density residential housing (i.e. single and semi-detached dwellings).

[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Definitions, p. 89.

Figure 4-5
Haldimand County
Household Forecast by Area, 2016 to 2046



Source: Watson & Associates Economists Ltd., 2019.

Figure 4-6
Haldimand County
Total Household Forecast by Policy Area, 2016 to 2046

Household Forecast Between Built-Up Area, Designated Greenfield Area and Rural						
Area Specific	Timing	Total Household Forecast	Low Density	Medium Density[1]	High Density[2]	Share of Total Households by Area
Built-Up Area	2016-2021	370	9%	68%	89%	24%
	2016-2031	1,240	10%	50%	88%	28%
	2016-2041	2,360	10%	47%	88%	32%
	2016-2046	3,040	10%	48%	88%	34%
Designated Greenfield Area	2016-2021	1,030	80%	32%	11%	68%
	2016-2031	2,760	78%	50%	12%	64%
	2016-2041	4,420	77%	53%	12%	60%
	2016-2046	5,270	77%	52%	12%	58%
Rural	2016-2021	120	10%	0%	0%	8%
	2016-2031	350	12%	0%	0%	8%
	2016-2041	590	13%	0%	0%	8%
	2016-2046	720	13%	0%	0%	8%
Total Haldimand County	2016-2021	1,520	100%	100%	100%	100%
	2016-2031	4,350	100%	100%	100%	100%
	2016-2041	7,360	100%	100%	100%	100%
	2016-2046	9,040	100%	100%	100%	100%

Source: Watson & Associates Economists Ltd., 2019.
[1] Includes townhouses and apartments in duplexes.
[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure 4-7 compares the total absolute amount and percentage of residential building permits issued over the 2007 to 2016 period (new units only) and relative to the housing forecast by urban area over the 2016 to 2046 planning horizon. Key highlights include:

- From 2007 to 2016, Haldimand County collectively issued residential building permits for 1,100 new residential units. Of these residential building permits, approximately 630 (or 63 annually) were issued within the B.U.A., representing 57% of the potential new development occurring in the County;
- Over this same time period, only 50 of the 630 (approximately 8%) residential building permits issued for new housing units in the B.U.A. were considered to be actual infill development. The remaining building permits issued represent remaining greenfield developments which were captured within the B.U.A. in 2006 at the time the B.U.A. was delineated; and
- In order for Haldimand County to achieve a 32% intensification target by 2041, the County will need to accommodate considerably more new households within its B.U.A. than it has in recent history.

Figure 4-7
Haldimand County
Residential Development within the B.U.A. by Urban Area
2007 to 2016 vs. 2016 to 2046[1]

Urban Area	Building Permit Activity (Total Units based on Issuance) 2007-2016				Forecast 2016-2046	
	Total Built-Up Area		Infill in Built-Up Area		Total Built-Up Area	
Caledonia	220	19%	30	2%	2,440	27%
Cayuga	110	10%	0	0%	110	1%
Dunnville	100	9%	20	2%	210	2%
Hagersville	150	13%	10	1%	270	3%
Townsend	0	0%	0	0%	10	0%
Jarvis	60	6%	0	0%	10	0%
Total Urban Areas	**630**	**57%**	**50**	**5%**	**3,040**	**34%**
Total Households	630		50		3,040	
Annual Urban Area Households (units/year)	**63**		**5**		**101**	
Total County-wide Households	**1,120**	**100%**	**50**	**100%**	**9,040**	**100%**

Source: Watson & Associates Economists Ltd., 2019.

[1] Infill within the B.U.A. is based on housing added through redevelopment or development within an established area.

Accommodating a greater share of high-density development within the B.U.A. in Haldimand County is fundamental to the objectives of the County O.P. As Haldimand County continues to mature, there will be a growing need to increase the utilization of available, designated urban lands to accommodate new development in more compact forms, particularly through high-density development. Population growth and increased urbanization of the County's B.U.A. is also anticipated to bring new urban amenities and municipal services to the County (i.e. community services/facilities, shopping, arts and cultural facilities, etc.) as well as local employment opportunities, which will benefit both the County and its local residents. Accordingly, provincial and local policies direct the County to accommodate an increasing share of its population base in high-density households. While this represents good planning policy, it is important to recognize that a large share of historical residential development within Haldimand County has been ground-oriented. To achieve the intensification targets set out herein, a greater proportion of the County's existing and future population will need to be accommodated in high-density households, including a greater proportion of adults between 30 and 54 years of age and their children. From a real-estate market perspective, the objective of accommodating a greater share of families in high-density households can be challenging, given the relatively higher price and carrying costs associated with larger apartments (i.e. apartments with greater than two bedrooms) compared to more compact ground-oriented housing forms with relatively comparable livable space (i.e. townhouses, stacked townhouses/back-to-back townhouses and other low-rise hybrid buildings). Furthermore, the feasibility of high-density housing forms across the County's existing neighbourhoods may need to be further examined against current zoning permissions for residential development. To facilitate this shift towards more compact high-density urban development, the County may also need to consider the use of planning and/or financial tools, as well as other policies, that address the implementation of the County's long-term vision.

4.4 Haldimand County Employment Forecast

4.4.1 County-Wide Employment Forecast by Sector

Figure 4-8 summarizes the long-term employment forecast for Haldimand County by employment sector. Between 2016 to 2046, Haldimand County is forecast to add approximately 8,100 jobs or 270 jobs annually. Of those jobs, approximately 35% is anticipated to be industrial sector, 4% in the primary sector, while the remaining jobs have been allocated to the commercial/institutional sector and work at home employment at 61%.[1] It is important to note that no fixed place of work (N.F.P.O.W.) employment is included in the employment sectors summarized below. N.F.P.O.W. employment is estimated to represent 18% of Haldimand County's employment base as of 2018.[2]

Figure 4-8
Haldimand County
Employment Forecast by Employment Sector Categories

Period	Primary	Industrial	Commercial/ Institutional	Work at Home	Total Employment
2011	950	7,280	8,660	1,680	18,570
2016	1,060	6,620	8,430	1,920	18,030
2018	**1,080**	**6,900**	**8,780**	**2,000**	**18,760**
2021	1,090	7,090	8,970	2,060	19,210
2026	1,130	7,540	9,570	2,270	20,510
2031	1,180	7,980	10,620	2,390	22,170
2036	1,240	8,510	11,320	2,580	23,650
2041	1,300	9,100	12,240	2,750	25,390
2046	1,370	9,470	12,350	2,920	26,110
2016-2046	**310**	**2,850**	**3,920**	**1,000**	**8,080**
Annual Average	10	95	131	33	269

Source: Watson & Associates Economists Ltd., 2019.

Note: No fixed place of work is included in primary, industrial and population-related categories.

Numbers may not add up precisely due to rounding.

[1] No fixed place of work is included in the primary, industrial and commercial and institutional sectors. No fixed place of work represents an employment base of approximately 3,140 as of 2016 and is forecast to increase by 1,300 jobs over the 2016 to 2041 period.

[2] No fixed place of work employment has been allocated to the following employment sector: industrial at 60%; commercial at 37%; and the remaining 3% to primary employment.

4.4.2 Haldimand County Rural and Urban Employment Base

It is recognized that Haldimand County has a large industrial employment presence outside the urban areas of Haldimand County, primarily in rural industrial areas. Rural industrial employment as of 2018 is estimated to represent 56% of the County's industrial employment base, as summarized in Figure 4-9. Rural industrial areas include the Lake Erie Industrial Park in Nanticoke, Kohler Industrial Park (southwest of Cayuga) and industrial areas near the hamlets of Selkirk, Port Maitland, Lowbanks, Canfield and Fisherville. There are also industrial sites outside the urban areas of Dunnville, Hagersville, Jarvis, Cayuga and Caledonia. Major industrial employers outside the County's urban areas include Stelco Lake Erie Works (1,350 employees), Esso Refinery (250 employees) and Charles Jones Industrial Limited (90 employees) in Nanticoke, CGC Inc. near Hagersville (300 employees) and Cargill near Jarvis (90 employees).[1] The Ontario Power Generation Plant, a former coal generating power plant in Nanticoke employed over 300 people prior to its closure in 2013. The site was recently redeveloped to accommodate a photovoltaic power station (solar power plant).[2]

It is anticipated that the County's rural areas will continue to accommodate a large share of the County's industrial base, in particular the Lake Erie Industrial Park in Nanticoke. As previously discussed, the Lake Erie Industrial Park in Nanticoke has been identified by the Province as a P.S.E.Z. The Lake Erie Industrial Park is a master-planned, 1,800-hectare (4,500 acres) site located along the north shore of Lake Erie and accommodates businesses in energy production, research and development, manufacturing and transportation. A three-kilometre area of land surrounding the park has been designated as an Industrial Influence Area. This designation guarantees that conflicting land uses will not develop in proximity to heavy industry in the industrial

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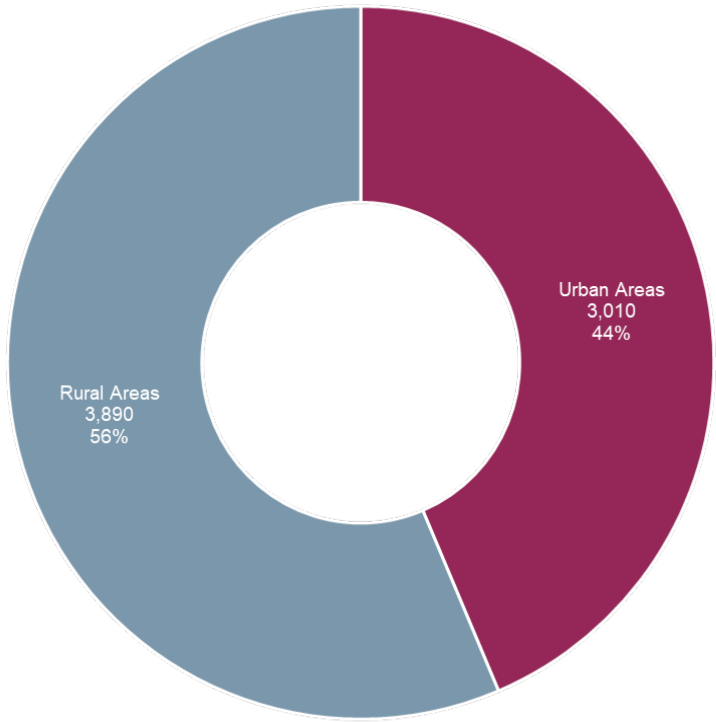
[1] Based on Scott's Business Directory and InfoCanada Business Directory.
[2] Based on news release by Ontario Power Generation, March 29, 2019, accessed via Ontario Power Generation website - https://www.opg.com/story/nanticoke-solar-now-generating-renewable-power-for-ontario/, June 15, 2019. It is unknown the number of employed at the new operation.

area.[1] The industrial park offers a range of parcels, including large parcels over 10 ha (25 acres). The Lake Erie Industrial Park is serviced with municipal water and sewer.[2]

The rural industrial area near Port Maitland is another serviced industrial area outside the County's urban areas. A watermain from Dunnville services the existing industrial development to this rural Industrial Area; however, it is noted in the County's O.P. that additional industrial development may proceed on partial services provided the water is used for fire protection purposes only and the use is a dry industry.[3]

[1] Based on information from the Haldimand County Website – Lake Erie Industrial Park, accessed via https://www.haldimandcounty.ca/business/lake-erie-industrial-park/, June 15, 2019.
[2] Haldimand County Official Plan, p. 94.
[3] Ibid., p. 67 and p. 68.

Figure 4-9
Haldimand County
Rural and Urban Industrial Base, 2018[1]



Source: Watson & Associates Economists Ltd.

Figure 4-10 summarizes the total employment base by employment category as of 2018 for the rural areas and the urban areas. The rural area employment base is estimated at 6,000 or approximately 32% of the total employment in Haldimand County as of 2018. Industrial employment comprises the largest share of the rural areas' employment at approximately 65% of the employment in the rural area, followed by primary employment at 18%, work at home employment at 10% and the remaining 7% is comprised of commercial/institutional employment.

[1] Based on an estimate by Watson & Associates Economists Ltd. utilizing Scott's Industrial Directory and InfoCanada Business Directory.

Figure 4-10
Haldimand County
Rural and Urban Employment Base, 2018

Employment Category	Rural Area		Urban Area		County-Wide Total Employment
	Employment	Rural Area Employment %	Employment	Urban Area Employment %	
Primary	**1,080**	**18%**	**0**	**0%**	**1,080**
County-Wide Share (%)	100%		0%		100%
Industrial	**3,890**	**65%**	**3,010**	**24%**	**6,900**
County-Wide Share (%)	56%		44%		100%
Commercial/Institutional	**440**	**7%**	**8,340**	**65%**	**8,780**
County-Wide Share (%)	5%		95%		100%
Work at Home	**600**	**10%**	**1,400**	**11%**	**2,000**
County-Wide Share (%)	30%		70%		100%
Total Employment	**6,010**	**100%**	**12,750**	**100%**	**18,760**
County-Wide Share (%)	**32%**		**68%**		**100%**

Source: Watson & Associates Economists Ltd., 2019.

Figure 4-11 summarizes urban area employment by Community Area and Employment Area. As summarized in Figure 4-11, the total employment within the urban community areas is estimated at 12,800. Of that total, approximately 75% of employment is concentrated in the Community Areas, while the remaining 25% of the total employment is within the Employment Areas. As summarized in Figure 4-10:

- The majority of industrial employment within Haldimand County's urban areas is concentrated in the Employment Areas, representing 75% of the industrial employment in the urban areas. The remaining 25% of industrial employment within the urban areas is primarily employment with no fixed place of work and, to a lesser extent, fragmented industrial sites located outside Employment Areas;[1] and
- Commercial/institutional employment within the urban areas is primarily concentrated in the Community Areas, representing approximately 90% of commercial/institutional employment in urban areas. The remaining 10% of

[1] This was informed by business directory data utilizing Scott's Industrial Directory and InfoCanada Business Directory.

commercial/institutional employment within the urban areas is located within the Employment Areas.

Figure 4-11
Haldimand County
Community Areas and Employment Areas
Employment Base by Sector, 2018

Employment Category	Community Areas		Employment Areas		Urban Area Total Employment
	Employment	Community Areas Employment %	Employment	Employment Area Employment %	
Primary	**0**	**0%**	**0**	**0%**	**0**
Urban Area Share (%)	0%		0%		0%
Industrial	**740**	**8%**	**2,270**	**72%**	**3,010**
Urban Area Share (%)	25%		75%		100%
Commercial/Institutional	**7,460**	**78%**	**880**	**28%**	**8,340**
Urban Area Share (%)	89%		11%		100%
Work at Home	**1,400**	**15%**	**0**	**0%**	**1,400**
Urban Area Share (%)	100%		0%		100%
Total Employment	**9,600**	**100%**	**3,150**	**100%**	**12,750**
Urban Area Share (%)	**75%**		**25%**		**100%**

Source: Watson & Associates Economists Ltd., 2019.
Note: No fixed place of work is included in the Rural Area, Employment Areas and Community Areas.

4.4.3 County-Wide Employment Forecast by Area

As summarized in Figure 4-12, the County’s urban Employment Areas are forecast to accommodate approximately 2,600 new employees or 32% of County-wide employment growth over the forecast horizon (2016 to 2046). Community Areas are forecast to accommodate 42% of County-wide employment growth, while the remaining 26% of employment growth is forecast to be accommodated in the County’s rural areas. Employment in the rural areas is anticipated to comprise primarily industrial employment and, to a lesser extent, work at home and commercial/institutional employment. Employment in the County’s urban Employment Areas is anticipated to accommodate 55% of the County’s industrial employment and approximately 26% of the County’s commercial and institutional employment growth over the forecast horizon. Overall, the urban areas in Haldimand County are anticipated to accommodate 5,900 jobs or approximately 74% of the County’s employment growth over the 2016 to 2046 planning horizon.

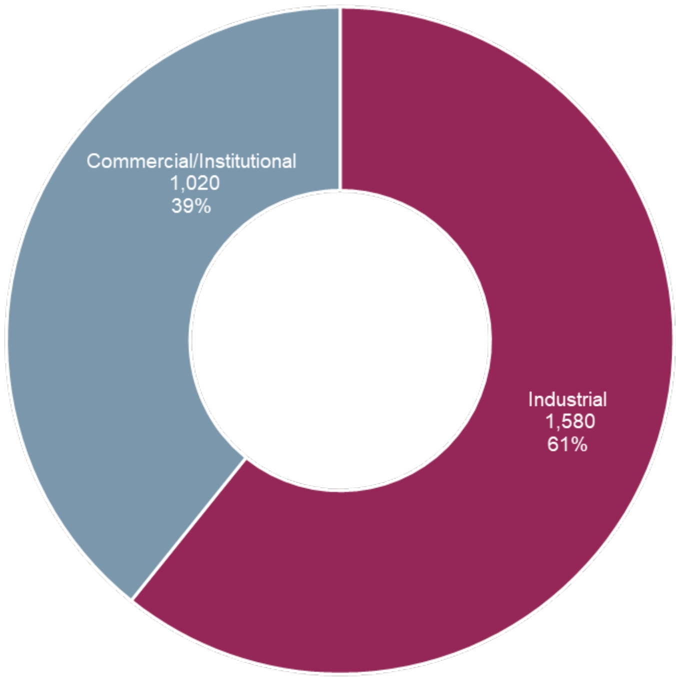
Figure 4-12
Haldimand County
Employment Forecast by Policy Area

Period	Rural Area	Urban Areas			County-Wide Total Employment
		Employment Areas	Community Areas	Urban Area Total	
2016	5,790	3,020	9,220	12,240	18,030
2018	**6,010**	**3,150**	**9,600**	**12,750**	**18,760**
2021	6,040	4,180	8,990	13,170	19,210
2026	6,380	4,450	9,680	14,130	20,510
2031	6,730	4,760	10,680	15,440	22,170
2036	7,160	5,070	11,420	16,490	23,650
2041	7,610	5,440	12,340	17,780	25,390
2046	7,930	5,620	12,560	18,180	26,110
2016-2041	**1,820**	**2,420**	**3,120**	**5,540**	**7,360**
Annual Average	**73**	**97**	**125**	**222**	**294**
Growth Shares	**25%**	**33%**	**42%**	**75%**	**100%**
2016-2046	**2,140**	**2,600**	**3,340**	**5,940**	**8,080**
Annual Average	**71**	**87**	**111**	**198**	**269**
Growth Shares	**26%**	**32%**	**41%**	**74%**	**100%**

Source: Watson & Associates Economists Ltd., 2019.
Note: No fixed place of work is included in the Rural Area, Employment Areas and Community Areas.
Numbers may not add up precisely due to rounding.

As summarized in Figure 4-13, employment growth within the County's urban Employment Areas is anticipated to be comprised of 61% industrial employment and remaining 39% commercial/institutional employment. It is important to note that the Employment Areas are comprised of core and non-core employment lands. Non-core employment lands (designated in the Haldimand County O.P. as Business Park) are designated to accommodate a wide-range of industrial and non-industrial uses, including large format retail.

Figure 4-13
Haldimand County
Distribution of Employment on Urban Employment Lands, 2016 to 2046



Source: Watson & Associates Economists Ltd.

4.5 Haldimand County Employment Growth Allocations

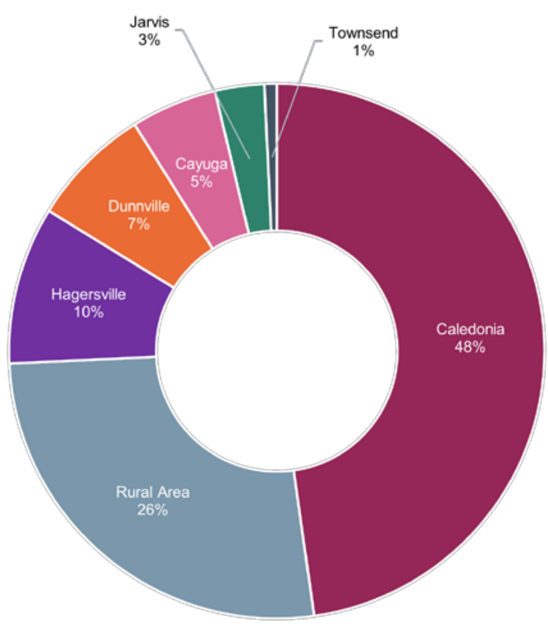
Figures 4-14a and 4-14b summarize the County's long-term employment forecast by urban area and remaining rural area. As summarized, Caledonia is forecast to accommodate almost half the County's employment growth (48%), followed by the rural areas at 26%, Hagersville at 10% and Dunnville at 7%. The urban areas of Cayuga, Townsend and Jarvis represent the remaining 9% of the County's growth forecast. Further details of the employment forecast by Community Area and Employment Area in the urban areas are provided in Appendix D.

Figure 4-14a
Haldimand County
Total Employment Growth by Urban Area and Remaining Rural Area, 2016 to 2046

Period	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Urban Areas Total	Rural Areas	Haldimand County
2016-2021	610	70	90	120	10	30	930	250	1,180
2016-2026	1,230	130	190	250	20	70	1,890	590	2,480
2016-2031	2,080	220	320	420	30	130	3,200	940	4,140
2016-2036	2,760	300	430	550	40	170	4,250	1,370	5,620
2016-2041	3,600	390	550	720	60	220	5,540	1,820	7,360
2016-2046	3,860	420	590	770	60	240	5,940	2,140	8,080
Share of Employment Growth									
2016-2041	49%	5%	7%	10%	1%	3%	75%	25%	100%
2016-2046	48%	5%	7%	10%	1%	3%	74%	26%	100%

Source: Watson & Associates Economists Ltd., 2019.
Note: Total employment numbers include work at home and no fixed place of work. Numbers may not add up precisely due to rounding.

Figure 4-14b
Haldimand County
Employment Growth Allocation by Urban Area and Remaining Rural Area
2016 to 2046



Source: Watson & Associates Economists Ltd.

Chapter 5
Haldimand County Land Needs Analysis

5. Haldimand County Land Needs Analysis

This chapter builds on the findings of the County's 2041 population, housing and employment forecast to provide a long-term urban residential land needs assessment for the County's D.G.A. community lands and employment lands. As previously mentioned, the greenfield community land and employment needs assessment has been prepared in accordance with the guidelines in the Growth Plan, 2019 and the provincial L.N.A. Methodology for the G.G.H.

5.1 Haldimand County Community Land Needs Analysis

5.1.1 D.G.A Community Lands - Existing Conditions

Figure 5-1 provides details on the existing conditions and recent growth trends within the D.G.A. community lands for each of the County's urban areas.[1] Key observations include:

- As of 2016, roughly 500 people lived in the County's D.G.A., and by 2018, the population grew to 1,900, representing an increase of 1,400 people;
- Caledonia experienced the majority of this growth during this relatively short time-period, increasing from approximately 10 people in 2016 to approximately 1,300 people in 2018; and
- Both Townsend and Jarvis also experienced growth in their respective D.G.A. community lands, adding approximately 70 and 60 people, respectively, between 2016 and 2018 in the D.G.A.

[1] In order to calculate the density, the first step involved determining the number of residents living in the D.G.A. as of 2016. This was calculated by adding up the 2016 Census population by dissemination areas (D.A.) that align with the greenfield areas for each urban area. Population growth that has occurred in the greenfield area since 2016 was then added to develop a 2018 population base. To complete this step, residential building permits between 2016 and 2017 were analyzed to determine how many new housing units were developed in the D.G.A. An average person per unit (P.P.U.) assumption was then applied to generate an estimated number of people that have been added to the D.G.A. Figure 5-1 summarizes the population in the D.G.A. by urban community.

Figure 5-1
Haldimand County
2018 Population Estimates in Designated Greenfield Area[1]

Urban Area	2016 Population		2018 Population
	Total Urban Area Population	Population In Designated Greenfield Area	Population In Designated Greenfield Area
Caledonia	10,870	10	1,340
Cayuga	1,880	310	310
Dunnville	6,060	90	100
Hagersville	3,130	0	20
Townsend	1,030	10	10
Jarvis	2,030	80	140
Total Urban Community Population	25,000	500	1,920

Source: 2016 population derived from Statistics Canada Census by Watson & Associates Economists Ltd., 2019.

5.1.2 D.G.A Community Lands Density Trends

Figure 5-2a summarizes current and anticipated residential densities in the D.G.A. by urban community. Residential units that are currently identified in the approvals process[2] were also reviewed to provide an indication of residential D.G.A. densities that are anticipated across the County in the near term. An overall population estimate for potential housing units in the development approvals process was then calculated by applying an average P.P.U. for these new dwellings. Figure 5-2b summarizes the density of occupied and residential development proposals currently active in the approvals process. The average residential density in the D.G.A. across Haldimand County, including occupied and active residential greenfield lands in the development approvals process is approximately 54 persons per hectare.

[1] Based on residential building permit issuance from 2016 to 2017.
[2] Refer to Appendix D for further details regarding population.

Figure 5-2a
Haldimand County
Residential Density in Designated Greenfield Area (Occupied + Active Residential Lands in the Development Approvals Process in Community Areas)

Urban Area	Net Residential Greenfield Area (ha)					
	Gross Land Area Adjusted for Environmental Features (A)	Vacant Land Area (B)	Greenfield Residential Lands Currently in Development Process & Occupied Lands as of 2018[1] (A-B)	Occupied Units and Units in Development Approvals Process as of 2018[2]	Population Associated with Occupied and Active Greenfield Development Approvals Process in New Units[3,4]	Residential Density = (Population in New Units / Occupied Land Area)
Caledonia	243	28	215	4,541	11,720	54
Townsend	152	152	0	0	0	0
Jarvis	113	101	12	235	630	53
Hagersville	93	48	45	886	2,390	53
Cayuga	34	21	13	210	570	44
Dunnville	20	16	4	141	330	93
Haldimand County	**655**	**366**	**288**	**6,013**	**15,640**	**54**

Source: Watson & Associates Economists Ltd., 2019.

[1] Includes occupied and committed lands.

[2] Includes registered but not built, draft plan approved, and residential applications that are under review.

[3] Estimated by multiplying new unit P.P.U.s which are derived from a custom order from Statistics Canada, 2016.

Low Density 2.904
Medium Density 2.679
High Density 1.811

[4] Includes estimated net Census undercount of 2.6%.

Figure 5-2b
Haldimand County
Summary of Residential Density in Designated Greenfield Area
(Occupied + Active Residential Lands)

		Designated Greenfield Area (ha)		
		Land Area (ha)	Population[1]	Density (Population per ha)
1	Occupied	59	1,920	33
2	Development Approvals[2]	231	13,710	59
	Total Inventory	**290**	**15,630**	**54**

Source: Watson & Associates Economists Ltd., 2019.

[1] Includes estimated net Census undercount of 2.6%.

[2] Includes registered but not built, draft plan approved, and residential applications that are under review.

Figure 5-3 summarizes the overall Community Area density calculations in the D.G.A. in Haldimand County as of 2018. As result of a greater share of residential activity in the greenfield area compared to non-residential activity, the density calculations are weighted towards residential greenfield density. The overall density in the greenfield area in Haldimand County, including both occupied and active residential/non-residential lands in Community Areas in the development approvals process, is 53 people and jobs per hectare.

Figure 5-3
Haldimand County
Density Trends in Designated Greenfield Area (Community Area)

	Haldimand County		
	Residential (ha)[1]	Non-Residential[2] (ha)	Total Designated Greenfield Area (ha)
Occupied Land Area & Active Development Lands[3]	290	14	**304**
% Share of Occupied Land	95%	5%	**100%**
Density[4]	54	42	
Weighted Density	51	2	**53**

Source: Watson & Associates Economists Ltd., 2019.
[1] Refer to Figure 5-2 for breakdown for furhter breakdown of residential land.
[2]Excludes lands that are designated Employment Areas.
[3]Includes lands that are occupied and in the development approvals process.
[4]Non-residential density calculations based on the following assumptions:
Building coverage of 25%
Commercial floorspace per worker of 550
Institutional floorspace per worker of 700

5.1.3 Population and Community Area Employment Forecast in the D.G.A.

As summarized in Figure 5-4, approximately 12,600 people and 1,900 jobs are forecast on D.G.A. lands across the County's urban areas. The population and employment forecast for the Community Area summarized in Figure 6-1 builds upon the Community Area forecast provided in Chapter 4. Over the 2016 to 2041 period, the D.G.A. is forecast to accommodate approximately 74% of the County's Community Area population growth and 48% of the County's Community Area employment growth. In total, the D.G.A. is forecast to accommodate approximately 14,500 people and jobs by 2041, as summarized in Figure 5-4.

Figure 5-4
Haldimand County
Designated Greenfield Area
Total Population and Community Area Employment by 2041

D.G.A. Community Lands Population and Employment at 2041[1]	
Population[2]	12,560
Community Area Employment[3]	1,940
Total Population and Employment	14,500

Source: Watson & Associates Economists Ltd., 2019.

Note: Figures have been rounded.

[1] Based on Community Area lands currently designated in the Haldimand County Official Plan.

[2] Includes Census population undercount of 2.6%.

[3] Includes usual place of work, no fixed place of work and work at home employment on urban employment lands.

5.1.4 Designated Greenfield Community Area Land Need, 2041

As summarized in Figure 5-5, Haldimand County currently has approximately 683 gross ha (1,688 gross acres) of D.G.A. lands in urban areas.[1] As previously mentioned, by 2041, the D.G.A. lands are forecast to accommodate approximately 14,500 people and jobs at a density of 48 people and jobs per gross ha. At an average density of 48 people and jobs per gross hectare, approximately 300 gross ha (741 gross acres) are required to accommodate the Community Area D.G.A. population and employment at 2041. As a result, the County is anticipated to have an overall surplus of approximately 384 ha (949 gross acres) of D.G.A. community lands by 2041. It is important to note that while the County has an overall surplus of community lands by 2041, it has a projected shortfall of approximately 18 gross ha (44 gross acres) identified for non-

[1] Refer to Appendix B for a breakdown of designated land area by status and urban area. Approximately 57 ha (141 acres) have been developed since 2018. Approved and pending applications comprise 231 ha (571 acres) of the land area, while 366 ha (904 acres) are currently vacant with no applications at this time.

residential uses within D.G.A. Community Areas (i.e. designated commercial areas).[1] As part of the County's O.P. review, the County should review, in further detail, location options to accommodate additional designated commercial lands within its urban areas. Additional details regarding the location of anticipated commercial land shortfalls by urban area are provided in section 5.2.

Figure 5-5
Haldimand County
Designated Greenfield Area
Total Population and Community Area Employment by 2041

Designated Greenfield Area - Community Area		Urban Area Total
Population[1]	A	12,565
Employment[2]	B	1,937
Total Population and Employment	**C = A+B**	**14,502**
Occupied Residenital Land at 2041 (ha)	D	253
Occupied Non-Residenital Land at 2041 (ha)	E	47
Occupied D.G.A. Community Area Land at 2041	**F = D +E**	**300**
Population and Employment Density (people and jobs/ha)	**G = C/F**	**48**
Total Residential Lands in the D.G.A. Community Area (ha)	H	655
Total Non-Residential Lands in the D.G.A. Community Area (ha)	I	29
Total Lands in the D.G.A. Community Area (ha)	**J = H+I**	**683**
Overall D.G.A. Community Area Surplus/Shortfall at 2041	**K = F-J**	**384**
Residential Surplus/Shortfall at 2041	**L = H-D**	**402**
Non-Residential Surplus/Shortfall at 2041	**M = I-E**	**-18**

Source: Watson & Associates Economists Ltd., 2019.
[1] Includes employment on employment lands in urban areas.
[2] Gross land area calculated in accordance with the Growth Plan, 2019.

[1] These are lands that are designated in the Haldimand County Official Plan as Large Format Retail and Community Commercial, as identified on Schedules B.1 to B.5.

5.2 Community Land Needs Analysis by Urban Area

Figures 5-6a and 5-6b provide a summary of the community land needs by urban area. As summarized, all the County's urban areas are able to accommodate the population forecast by 2041. Below are key highlights of the land needs analysis:

- A large surplus of residential community lands has been identified in Townsend (147 gross ha/363 gross acres), Jarvis (99 gross ha/244 gross acres), Caledonia (91 gross ha/225 gross acres) and Hagersville (54 gross ha/133 gross acres); and
- With the exception of Townsend, all the County's urban areas have a small shortage of community D.G.A. lands to accommodate non-residential development.

It is recognized that a large share (approximately 61%) of the identified 2041 Community Area land surplus identified for Haldimand County is concentrated within the urban areas of Jarvis and Townsend where limited market demand for residential development currently exists. On the other hand, in Dunnville and Cayuga, where market demand for residential development is relatively stronger, the supply of residential demand is more limited. Accordingly, it is recommended that the County's long-term urban land needs are closely monitored by urban area.

Figure 5-6a
Haldimand County
Community Area D.G.A. Land Needs by Urban Area at 2041

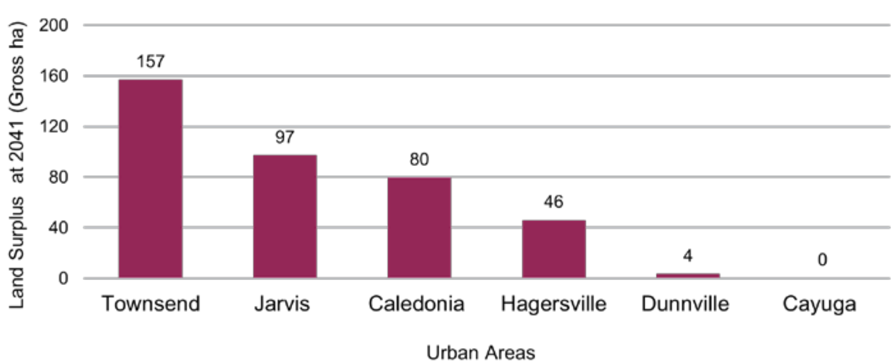
Designated Greenfield Area - Community Area		Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Urban Area Total
		Community Area D.G.A. at 2041						
Population[1]	A	7,432	1,255	961	2,044	209	663	12,565
Employment[2]	B	1,139	162	157	351	29	99	1,937
Total Population and Employment	**C = A+B**	**8,571**	**1,417**	**1,118**	**2,395**	**238**	**762**	**14,502**
Occupied Residenital Land at 2041 (ha)	D	152	31	12	39	5	14	253
Occupied Non-Residenital Land at 2041 (ha)	E	27	4	4	8	1	2	47
Occupied D.G.A. Community Area Land at 2041	**F = D +E**	**179**	**35**	**16**	**47**	**6**	**16**	**300**
Population and Employment Density (people and jobs/ha)	**G = C/F**	**48**	**40**	**70**	**51**	**38**	**47**	**48**
Total Residential Lands in the D.G.A. Community Area (ha)	H	243	34	20	93	152	113	655
Total Non-Residential Lands in the D.G.A. Community Area (ha)	I	15	2	0	0	11	0	29
Total Lands in the D.G.A. Community Area (ha)	**J = H+I**	**258**	**36**	**20**	**93**	**163**	**113**	**683**
Overall D.G.A. Community Area Surplus/Shortfall at 2041	**K = F-J**	**80**	**0**	**4**	**46**	**157**	**97**	**384**
Residential Surplus/Shortfall at 2041	**L = H-D**	**91**	**3**	**8**	**54**	**147**	**99**	**402**
Non-Residential Surplus/Shortfall at 2041	**M = I-E**	**-11**	**-3**	**-4**	**-8**	**10**	**-2**	**-18**

Source: Watson & Associates Economists Ltd., 2019.

[1] Includes employment on employment lands in urban areas.

[2] Gross land area calculated in accordance with the Growth Plan, 2019.

Figure 5-6b
Haldimand County
Community Area D.G.A. Land Surplus by Urban Area at 2041



Source: Watson & Associates Economists Ltd.

5.3 Haldimand County Employment Land Needs Analysis

5.3.1 Urban Employment Area Existing Conditions

As summarized in Figure 5-7, as of 2018, approximately 136 gross ha (336 gross acres) of employment lands are occupied/developed across the County's urban Employment Areas accommodating an employment base of approximately 3,150 employees.[1] Townsend is the only urban area within Haldimand County that does not have an established Employment Area. The County's occupied urban employment lands are primarily concentrated in the urban areas of Caledonia and Dunnville which represent 46% and 32% of the County's occupied employment lands, respectively. The following observations are provided regarding the County's occupied/developed urban Employment Areas:

- Caledonia and Dunnville accommodate the majority of the County's employment in urban Employment Areas (approximately 79%);
- As of 2018, the overall employment density (jobs/gross ha) on the County's urban employment lands was approximately 23 jobs/gross ha (9 jobs/acre). This was informed by a sample analysis of the County's Employment Areas carried out as part of this study;[2]
- The County's non-core employment lands accommodate a wider-range of permitted retail uses relative to core employment lands. Non-core employment lands have an average employment density of approximately 33 jobs/ha (13 jobs/acre);[3] and

[1] It is important to note that only developed employment land that is occupied was included in the density analysis.
[2] Refer to Appendix E for the results of the Employment Area Density Sample. Density sample represents 66% of the County's occupied urban employment land. Based on the density sample, the average density of occupied urban employment lands is 18 jobs/gross ha (or 22 jobs/net ha). It is important to note that the gross density in Figure 5-7 has been adjusted to reflect additional no fixed place of work employment not captured in the survey.
[3] Based on sample carried out by Watson & Associates Economists Ltd. Examples of major retail uses on non-core employment lands include a Food Basics and multi-tenant retail plaza in Caledonia and a Sobeys and Canadian Tire in Dunnville.

- While Jarvis and Cayuga have a higher employment density relative to the rest of the County, it is important to note that the Employment Areas within these urban areas have a very small occupied/developed land area (less than 10 gross ha/25 gross acres).

Figure 5-7
Haldimand County
Urban Employment Areas as of 2018

Urban Employment Areas		Employment Areas at 2018						
		Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Urban Employment Areas
Employment at 2018	A	1,368	232	1,108	289	0	153	3,150
Occupied Employment Land at 2018 (gross ha)	B	63	7	44	17	0	5	136
Employment Density (jobs/gross ha)	C = A/B	22	32	25	17	0	29	23
Share of County's Occupied Land Area at 2018	D	46%	5%	32%	13%	0%	4%	100%

Source: Watson & Associates Economists Ltd., 2019.
[1] Includes employment on employment lands in urban areas.
[2] Gross land area calculated in accordance with the Growth Plan, 2019.

5.3.2 Urban Employment Land Density, 2018 to 2041

As summarized in Figure 5-8, over the 2018 to 2041 forecast period, it is anticipated that employment density levels will modestly decrease to 19 jobs/gross ha (8 jobs/gross acre) from 23 jobs/gross ha (9 jobs/gross acre).[1] This decrease in employment density is largely due to macro-economic trends that are influencing average density levels on employment lands. Generally, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive warehousing and logistics facilities to support distribution and transportation of goods throughout the expanding urban population base. These trends are anticipated to have a downward impact on the density levels on employment lands in Haldimand County.

[1] Employment growth accommodated on employment lands over the 2018 to 2041 is anticipated to have an average density of 16 jobs/gross ha (6 jobs/gross acre).

Figure 5-8
Haldimand County
Average Density in Urban Employment Areas, 2018 to 2041

Employment Density (jobs/gross ha)		
2018	New Growth on Employment Lands 2018-2041	2041
23	16	19

Source: Watson & Associates Economists Ltd.

5.3.3 Urban Employment Land Demand, 2018 to 2041

Employment growth within the County's urban Employment Areas is anticipated to accommodate 1,300 industrial jobs and 1,000 jobs in commercial/institutional sectors (total employment growth of 2,290). It is important to note that the Employment Areas are comprised of core and non-core employment lands. Non-core employment lands (designated in the Haldimand County O.P. as Business Park) are designated to accommodated a wide-range of industrial and non-industrial uses, including large format retail.

As summarized in Figure 5-8, by 2041 approximately 5% of the employment growth on urban employment lands over the 2018 to 2041 period is anticipated to be accommodated through intensification on existing employment lands. Overall, the County's urban employment lands are anticipated to accommodate 5,400 jobs (114 jobs to be accommodated through intensification). Based on average employment density of 19 jobs/gross ha (8 jobs/gross acre) this generates an urban employment land requirement of 281 gross ha (694 gross acres).

Figure 5-9
Haldimand County
Urban Employment Demand on Employment Lands

Sector	2018		2018 - 2041		2041		
	2018 Employment	Average Employment Density (jobs/gross ha)	Employment Growth, 2018-2041	Average Employment Density (jobs/gross ha)	2041 Employment	Employment Density (jobs/ha)	Land Area (gross ha)
Industrial	2,270	20	1,219	10	3,489	15	237
Commercial/Institutional	880	42	957	42	1,837	42	44
Total	**3,150**	**23**	**2,176**	**15**	**5,326**	**19**	**281**
Intensification on Employment Lands (5%)			**114**		**114**		
Total Including Intensification on Employment Lands			**2,290**	**16**	**5,440**	**19**	

Source: Watson & Associates Economists Ltd.

5.3.4 Urban Employment Land Needs 2041

As summarized in Figure 5-10, it is forecast that approximately 5,400 employees will be accommodated on existing designated employment lands (approximately 281 gross ha/694 gross acres). With respect to the County's long-term urban employment land needs to 2041, key assumptions and findings include:

- An average forecast employment density of 16 jobs/gross ha (6 jobs/gross acre) has been assumed for all new development accommodated on designated Employment Areas between 2018 and 2041 (as previously summarized in Figure 5-8);[1]
- In accordance with Employment Area density assumption provided above, the County's overall urban employment density by 2041 is anticipated to decline to 19 jobs/gross ha (from 23 jobs/gross ha);
- It is forecast that approximately 281 gross ha (694 gross acres) will be required to accommodate 5,400 jobs that are forecast on employment lands by 2041 (as previously summarized in Figure 5-9);

[1] This density is based on 15 jobs/gross ha (6 jobs/gross acre) on vacant employment lands and approximately 5% of employment growth accommodated through intensification on existing occupied lands. This is summarized in Figure 5-9.

- The County has approximately 408 gross ha (1,008 gross acres) of designated employment lands which exceeds the land demand requirement of 281 gross ha (694 gross acres) by 2041; and
- By 2041 it is forecast that there will be a surplus of 127 gross ha (314 gross acres) to accommodate employment growth to 2041.

Figure 5-10
Haldimand County
Urban Employment Areas as of 2018

Urban Employment Areas		Urban Employment Areas at 2041
Employment at 2041	A	5,440
Employment at 2041, Adjusted for Intensification	B	5,326
Occupied Employment Land at 2041 (gross ha)	C	281
Employment Density (jobs/gross ha)	D = B/C	19
Supply - Total Designated Employment Lands (gross ha)	E	408
Employment Area Surplus/Shortfall at 2041	**F = E-C**	**127**

Source: Watson & Associates Economists Ltd., 2019.
[1] Includes employment on employment lands in urban areas.
[2] Gross land area calculated in accordance with the Growth Plan, 2019.

5.4 Urban Employment Land Needs Analysis by Urban Area, 2018 to 2041

5.4.1 Employment Area Forecast by Urban Area, 2018 to 2041

Employment Areas within the urban areas are forecast to accommodate employment growth of 2,290 employees over the forecast horizon. As summarized in Figure 5-11, Employment Areas in Caledonia is forecast to accommodate the majority of employment growth at 65%, followed by Dunnville at 15%, Cayuga at 12%, Hagersville at 8% and Jarvis at 3%.

Figure 5-11
Haldimand County
Urban Employment Areas, 2018 to 2041

Period	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Urban Employment Areas
Employment Areas	1,420	280	350	180	0	60	2,290
Share of Urban Employment Area Growth	62%	12%	15%	8%	0%	3%	100%

Source: Watson & Associates Economists Ltd., 2019.
Note: Total employment numbers include work at home and no fixed place of work. Numbers may not add up precisely due to rounding.

5.4.2 Urban Employment Land Needs by Urban Area, 2041

Figure 5-11 provides a summary of the employment land needs by urban area over the 2018 to 2041 period. As previously mentioned, the County has a surplus of employment lands of approximately 127 gross ha (314 gross acres). The County's long-term employment land needs by urban area are summarized below:

- There is a shortage of employment lands to accommodate employment lands growth in Hagersville of approximately 12 gross ha (30 gross acres). As previously mentioned, Hagersville does not have any designated vacant employment lands to accommodate future growth;
- Cayuga has a slight shortage of employment lands at 3 gross ha (7 gross acres); and
- Jarvis and Caledonia have an employment land surplus of 65 gross ha (160 gross acres) and 58 gross ha (143 gross acres), respectively.

While Hagersville currently does not have any vacant employment lands, there are approximately 73 ha (180 acres) of designated Agricultural land that are within the urban boundary of Hagersville. These lands are proposed to remain in the urban boundary as "future development" and will be converted (if required) to an urban designation based upon need.

Figure 5-11
Haldimand County
Urban Employment Areas at 2041

Urban Employment Areas		Urban Employment Areas at 2041						
		Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Total Urban Areas
Employment at 2041	A	2,788	512	1,458	469	0	213	5,440
Employment at 2041, Adjusted for Intensification	B	2,731	512	1,401	469	0	213	5,326
Occupied Employment Land at 2041 (gross ha)	C	154	26	63	29	0	9	281
Employment Density (jobs/gross ha)	D = B/C	18	20	22	16	0	23	19
Supply - Total Designated Employment Lands (gross ha)	E	212	23	83	17	0	74	408
Employment Area Surplus/Shortfall at 2041	**F = E-C**	**58**	**-3**	**19**	**-12**	**0**	**65**	**127**

Source: Watson & Associates Economists Ltd., 2019.
[1] Includes employment on employment lands in urban areas.
[2] Gross land area calculated in accordance to the Growth Plan, 2019.

Chapter 6
Forecast Comparison with Previous 2014 Update

6. Forecast Comparison with Previous 2014 Update

As outlined in Chapter 1, a key objective of this growth update is to review and re-assess the distribution of the growth forecasts by urban and rural area based on recent and anticipated development trends. Figures 6-1 through 6-3 compare the population, housing and employment forecasts for the County by urban area and remaining rural area provided in this update to the forecast prepared as part of the 2014 Population, Household and Employment Forecast Update, 2011 to 2041.[1] Key observations include:

Population and Housing Forecast

- Between 2011 and 2041, the percentage share of housing activity allocated to the remaining rural area is forecast to decline in comparison to the previous 2014 update. The trend is anticipated to be driven by market demand for urban housing from young adults, families, empty-nesters and seniors, as well as the impacts associated with provincial and local planning policy, which directs population and housing growth to settlement areas;
- The percentage share of forecast population and housing growth allocated to Caledonia is anticipated to increase significantly based on a review of current residential development applications and anticipated long-term residential housing demand in this area; and
- The percentage share of forecast population and housing growth is anticipated to remain relatively steady in Cayuga and Hagersville, but is expected to decline slightly in Jarvis, Townsend and Dunnville.

Employment Forecast

- Over the 2011 to 2016 period, the County lost approximately 530 jobs due to employment losses in the industrial sector. As a result of employment loss, employment in the short to medium term (i.e. 2021 and 2026) is lower than the employment forecast growth prepared in 2014; and

[1] Haldimand County Population, Household and Employment Forecast Update, 2011-2041 prepared by Watson & Associates Economists Ltd., April 4, 2014.

- In accordance with our review of recent employment trends and anticipated non-residential market demand, just under half the employment growth has been allocated to Caledonia. Comparatively, this represents a slightly lower share of employment growth relative to pervious 2014 update.

Figure 6-1a
Haldimand County
Population Forecast Comparisons

Population								
	2011	2016	2021	2026	2031	2036	2041	2046
Haldimand County Population, Household & Employment Forecast (2019)	46,000	46,800	50,100	53,200	56,700	60,200	64,100	67,800
Haldimand County Population, Household & Employment Forecast (2014)	46,700	48,000	50,100	53,200	56,700	60,200	64,100	0
Difference	-700	-1,200	0	0	0	0	0	67,800

Source: 2011 to 2016 from Statistics Canada Census; 2021 to 2046 is a forecast by Watson & Associates Economists Ltd., 2018.

2014 figures taken from Haldimand County Population, Household & Employment Forecast Update, 2011-2041 by Watson & Associates Economists Ltd., 2014.

Note: Net population undercount estimated at 2.6%.

Figure 6-1b
Haldimand County
Population Forecast Allocation Comparisons

Urban Area	Share of County Population Growth			
	2016-2046	2011-2041		
	2019 Study	2019 Study	2014 Study[1]	Difference
Caledonia	65%	64%	62%	1%
Cayuga	7%	8%	7%	1%
Dunnville	6%	7%	5%	2%
Hagersville	16%	19%	16%	3%
Jarvis	3%	1%	2%	-1%
Townsend	1%	0%	0%	0%
Remaining Rural	2%	2%	9%	-7%
Total County	100%	100%	100%	

[1]Haldimand County, Population, Household & Employment Forecast Update, 2011-2041 prepared by Watson & Associates Economists Ltd., April 2014.

Figure 6-2a
Haldimand County
Housing Forecast Comparisons

	Households							
	2011	2016	2021	2026	2031	2036	2041	2046
Haldimand County Population, Household & Employment Forecast (2018)	16,780	17,430	18,955	20,335	21,770	23,185	24,790	26,465
Haldimand County Population, Household & Employment Forecast (2014)	16,780	17,550	18,710	19,990	21,430	22,810	24,150	0
Difference	0	-120	245	345	340	375	640	26,465

Source: 2011 to 2016 from Statistics Canada Census; 2021 to 2046 is a forecast by Watson & Associates Economists Ltd., 2018.
2014 figures taken from Haldimand County Population, Household & Employment Forecast Update, 2011-2041 by Watson & Associates Economists Ltd., 2014.
Note: Numbers may not add up precisely due to rounding.

Figure 6-2b
Haldimand County
Housing Forecast Allocation Comparisons

Urban Area	Share of County Housing Growth			
	2016-2046	2011-2041		
	2019 Study	2019 Study	2014 Study[1]	Difference
Caledonia	61%	58%	53%	5%
Cayuga	6%	6%	6%	0%
Dunnville	7%	8%	7%	1%
Hagersville	14%	13%	13%	0%
Jarvis	3%	3%	3%	0%
Townsend	1%	2%	1%	1%
Remaining Rural	8%	10%	18%	-8%
Total County	100%	100%	100%	

[1]Haldimand County, Population, Household & Employment Forecast Update, 2011-2041 prepared by Watson & Associates Economists Ltd., April 2014.

Figure 6-3a
Haldimand County
Employment Forecast Comparisons

Total Employment								
	2011	2016	2021	2026	2031	2036	2041	2046
Haldimand County Population, Household & Employment Forecast (2018)	18,560	18,030	19,205	20,510	22,175	23,655	25,380	26,110
Haldimand County Population, Household & Employment Forecast (2014)	18,540	19,395	20,350	21,065	22,130	23,650	25,605	0
Difference	20	-1,365	-1,145	-555	45	5	-225	26,110

Source: 2001 to 2016 from Statistics Canada Place of Work data; 2021 to 2046 estimated by Watson & Associates Economists Ltd., 2018.

Watson (2014) figures taken from Haldimand County Population, Household & Employment Forecast Update, 2011-2041 by Watson & Associates Economists Ltd., 2014.

Figure 6-3b
Haldimand County
Employment Forecast Allocation Comparisons

Urban Area	Share of County Employment Growth		
	2016-2046 2019 Study	2011-2041 2014 Study[1]	Difference
Caledonia	48%	55%	-8%
Cayuga	5%	6%	0%
Dunnville	7%	12%	-5%
Hagersville	10%	9%	1%
Jarvis	3%	8%	-5%
Townsend	1%	1%	0%
Remaining Rural	26%	9%	18%
Total County	100%	100%	

[1]Haldimand County, Population, Household & Employment Forecast Update, 2011-2041 prepared by Watson & Associates Economists Ltd., April 2014.

Chapter 7
Conclusions

7. Conclusions

7.1 Haldimand County Long-Term Growth Outlook

Future population, housing and employment growth within Haldimand County is dependent in large measure on the following:

- The continued economic growth and competitiveness of the regional economy across the G.G.H., particularly related to export-based sectors tied to established industrial sectors and emerging knowledge-based industries;
- The ability of Haldimand County to attract new industry and position itself as a hub, while encouraging entrepreneurship, value-added services, small business development and investment retention;
- The County's attractiveness to families that are drawn to the County in search of competitively priced, ground-oriented housing within proximity to local and regional employment markets;
- The County's ability to accommodate a growing labour force through a diverse range of housing options by structure type, tenure and affordability;
- The County's attractiveness to the 65+ age group as a retirement/future retirement destination; and
- The timing of planned major regional and local infrastructure improvements/ expansions.

Each of the above factors has been examined in assessing long-term population, housing and employment growth for Haldimand County to arrive at the County's long-term population, housing and employment growth forecast to the year 2041.

By 2046, Haldimand County's population and its employment base are forecast to reach 67,800 and 26,100, respectively.[1] Based on our assessment of regional economic and demographic trends, as well as a review of the local housing and employment market, approximately 61% and 48% of County-wide housing and employment growth, respectively, has been allocated to Caledonia. Relative to historical trends, steady

[1] Population figures include a net Census undercount estimated at approximately 2.6%. The Census undercount represents the net number of permanent residents who are missed (i.e. over-coverage less under-coverage) during Census enumeration.

population growth is also forecast for the urban areas of Cayuga and Hagersville, while Dunnville, Jarvis and Townsend are anticipated to experience moderate to low population and employment growth levels over the next 30 years.

7.2 Community Area Land Needs, 2041

Haldimand County currently has approximately 683 gross ha (1,688 gross acres) of designated greenfield area (D.G.A.) lands in urban areas.[1] By 2041, the D.G.A lands are forecast to accommodate approximately 14,500 people and jobs at a density of 48 people and jobs per gross ha. At an average density of 48 people and jobs per gross ha, approximately 300 gross ha (741 gross acres) will be required to accommodate the Community Area D.G.A. population and employment by the year 2041. Comparing the results of this long-term urban land demand analysis with the County's current supply of designated, developable lands in Community Areas indicates that the County is anticipated to have an overall surplus of approximately 384 ha (949 gross acres) of D.G.A. community lands by 2041.

It is important to note that, while the County is anticipated to have an overall surplus of community lands by 2041, it has a projected shortfall of approximately 18 gross ha (44 gross acres) of lands identified for non-residential uses within D.G.A. Community Areas (i.e. designated commercial areas).[2] As part of the County's O.P. review, the County should review, in further detail, location options to accommodate additional designated commercial lands within its urban areas.

It is further recognized that a large share (approximately 61%) of the identified 2041 Community Area land surplus identified for Haldimand County is concentrated within the urban areas of Jarvis and Townsend where limited market demand for residential development currently exists. On the other hand, in Dunnville and Cayuga, where market demand for residential development is relatively stronger, the supply of

[1] Refer to Appendix C for a breakdown of designated land area by status and urban area. Approximately 57 ha (141 acres) have been developed since 2018. Approved and pending applications comprise 231 ha (571 acres) of the land area, while 366 ha (904 acres) are currently vacant with no applications at this time.
[2] These are lands that are designated in the Haldimand County Official Plan as Large Format Retail and Community Commercial, as identified on Schedules B.1 to B.5.

residential demand is more limited. Accordingly, it is recommended that the County's long-term urban land needs are closely monitored by urban area.

7.3 Employment Area Land Needs, 2041

By 2041, Haldimand County is forecast to have a surplus of approximately 127 gross ha (314 gross acres) of designated employment lands. Notwithstanding this identified County-wide surplus, the location of designated employment lands across Haldimand County is not uniformly distributed throughout the County's urban areas in accordance with forecast demand. More specifically, employment land shortages of approximately 12 gross ha (30 gross acres) and 3 gross ha (7 acres) have been identified in Hagersville and Cayuga, respectively. In contrast, Jarvis and Caledonia are anticipated have an employment land surplus of 65 gross ha (160 gross acres) and 58 gross ha (143 gross acres), respectively, by the year 2041.

Appendices

Appendix A
Haldimand County Summary of Potential Housing Units

Appendix A: Haldimand County Summary of Potential Housing Units

Figure A-1
Haldimand County
Potential Residential Supply by Area

Haldimand County				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	69	22	0	91
Draft Plan Approved	41	14	0	55
Application Under Review	14	30	116	160
Vacant Lands	8	0	0	8
Additional Intensification	93	362	1,363	1,818
Total Built Up Area	225	428	1,479	2,132
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	314	126	0	440
Draft Plan Approved	3,567	316	266	4,149
Application Under Review	300	345	358	1,003
Vacant Lands	5,829	1,088	854	7,771
Additional Intensification	0	0	0	0
Total Greenfield	10,010	1,875	1,478	13,363
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	383	148	0	531
Draft Plan Approved	3,608	330	266	4,204
Application Under Review	314	375	474	1,163
Vacant Lands	5,837	1,088	854	7,779
Additional Intensification	93	362	1,363	1,818
Total Haldimand County	10,235	2,303	2,957	15,495

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-2
Haldimand County - Caledonia
Potential Residential Supply by Area

Caledonia				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	2	14	0	16
Draft Plan Approved	0	0	0	0
Application Under Review	0	0	0	0
Vacant Lands	0	0	0	0
Additional Intensification	20	81	307	408
Total Built Up Area	22	95	307	424
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	248	126	0	374
Draft Plan Approved	2,491	204	266	2,961
Application Under Review	224	182	310	716
Vacant Lands	443	83	65	591
Additional Intensification	0	0	0	0
Total Greenfield	3,406	595	641	4,642
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	250	140	0	390
Draft Plan Approved	2,491	204	266	2,961
Application Under Review	224	182	310	716
Vacant Lands	443	83	65	591
Additional Intensification	20	81	307	408
Total Caledonia	3,428	690	948	5,066

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-3
Haldimand County - Cayuga
Potential Residential Supply by Area

Cayuga				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	0	0	0	0
Application Under Review	0	0	12	12
Vacant Lands	0	0	0	0
Additional Intensification	13	50	185	248
Total Built Up Area	13	50	197	260
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	12	0	0	12
Draft Plan Approved	138	60	0	198
Application Under Review	0	0	0	0
Vacant Lands	344	64	50	458
Additional Intensification	0	0	0	0
Total Greenfield	494	124	50	668
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	12	0	0	12
Draft Plan Approved	138	60	0	198
Application Under Review	0	0	12	12
Vacant Lands	344	64	50	458
Additional Intensification	13	50	185	248
Total Cayuga	507	174	247	928

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-4
Haldimand County - Dunnville
Potential Residential Supply by Area

Dunnville				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	30	8	0	38
Draft Plan Approved	0	14	0	14
Application Under Review	14	0	14	28
Vacant Lands	0	0	0	0
Additional Intensification	22	79	298	399
Total Built Up Area	66	101	312	479
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	0	0	0	0
Application Under Review	50	40	48	138
Vacant Lands	254	47	37	338
Additional Intensification	0	0	0	0
Total Greenfield	304	87	85	476
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	30	8	0	38
Draft Plan Approved	0	14	0	14
Application Under Review	64	40	62	166
Vacant Lands	254	47	37	338
Additional Intensification	22	79	298	399
Total Dunnville	370	188	397	955

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-5
Haldimand County - Hagersville
Potential Residential Supply by Area

Hagersville				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	37	0	0	37
Draft Plan Approved	41	0	0	41
Application Under Review	0	0	0	0
Vacant Lands	8	0	0	8
Additional Intensification	26	104	391	521
Total Built Up Area	112	104	391	607
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	735	52	0	787
Application Under Review	18	75	0	93
Vacant Lands	766	143	112	1,021
Additional Intensification	0	0	0	0
Total Greenfield	1,519	270	112	1,901
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	37	0	0	37
Draft Plan Approved	776	52	0	828
Application Under Review	18	75	0	93
Vacant Lands	774	143	112	1,029
Additional Intensification	26	104	391	521
Total Hagersville	1,631	374	503	2,508

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-6
Haldimand County - Townsend
Potential Residential Supply by Area

Townsend				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	0	0	0	0
Application Under Review	0	30	90	120
Vacant Lands	0	0	0	0
Additional Intensification	0	0	0	0
Total Built Up Area	0	30	90	120
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	0	0	0	0
Application Under Review	0	0	0	0
Vacant Lands	2,414	451	354	3,219
Additional Intensification	0	0	0	0
Total Greenfield	2,414	451	354	3,219
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	0	0	0	0
Application Under Review	0	30	90	120
Vacant Lands	2,414	451	354	3,219
Additional Intensification	0	0	0	0
Total Townsend	2,414	481	444	3,339

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-7
Haldimand County - Jarvis
Potential Residential Supply by Area

Jarvis				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	0	0	0	0
Application Under Review	0	0	0	0
Vacant Lands	0	0	0	0
Additional Intensification	12	48	182	242
Total Built Up Area	12	48	182	242
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	32	0	0	32
Draft Plan Approved	134	0	0	134
Application Under Review	0	48	0	48
Vacant Lands	1,608	300	236	2,144
Additional Intensification	0	0	0	0
Total Greenfield	1,774	348	236	2,358
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	32	0	0	32
Draft Plan Approved	134	0	0	134
Application Under Review	0	48	0	48
Vacant Lands	1,608	300	236	2,144
Additional Intensification	12	48	182	242
Total Jarvis	1,786	396	418	2,600

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-8
Haldimand County – Remaining Rural Area
Potential Residential Supply by Area

Remaining Rural Area				
Built Up Area	Low	Medium[1]	High[2]	Total
Registered Not Built	0	0	0	0
Draft Plan Approved	0	0	0	0
Application Under Review	0	0	0	0
Vacant Lands	0	0	0	0
Additional Intensification	0	0	0	0
Total Built Up Area	0	0	0	0
Greenfield	Low	Medium[1]	High[2]	Total
Registered Not Built	22	0	0	22
Draft Plan Approved	69	0	0	69
Application Under Review	8	0	0	8
Vacant Lands	0	0	0	0
Additional Intensification	0	0	0	0
Total Greenfield	99	0	0	99
TOTAL	Low	Medium[1]	High[2]	Total
Registered Not Built	22	0	0	22
Draft Plan Approved	69	0	0	69
Application Under Review	8	0	0	8
Vacant Lands	0	0	0	0
Additional Intensification	0	0	0	0
Total Remaining Rural Area	99	0	0	99

Source: Haldimand County Planning Department as of June 2018.

[1] Includes townhouses and apartments in duplexes.

[2] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Figure A-9
Haldimand County
Residential Intensification Potential

Residential Intensification Areas

Caledonia

Address	Net Land Area (Hectares)	Average Density (units per Net Hectares)	Unit Yield	Low	Medium	High
108 and 140 Argyle Street South	1.01	82	82	4	16	62
127 Argyle Street South	0.32	82	26	1	5	20
131 - 151 Argyle Stteet South	0.13	82	11	1	2	8
160 Argyle Street South	0.77	82	63	3	13	47
151, 157 & 163 Argyle Street South	0.25	82	20	1	4	15
263 & 271 Argyle Street South	0.31	82	25	1	5	19
307 & 309 Argyle Street South	0.81	82	66	3	13	50
272 Argyle Street South	1.40	82	115	6	23	86
Total Caledonia			**408**	**20**	**81**	**307**

Hagersville

Address	Net Land Area (Hectares)	Average Density (units per Net Hectares)	Unit Yield	Low	Medium	High
14, 18, 22, 26, 28 Main Street South & 11 Howard Street	0.66	82	53	3	11	40
12 Main Street South	0.17	82	14	1	3	11
78 Main Street South	0.40	82	33	2	7	25
89, 91, 93 & 97 Main Street South & 7 Parkview Road	0.55	82	45	2	9	34
101 Main Street South	1.05	82	85	4	17	64
18, 26 & 30 Main Street North	0.32	82	26	1	5	20
41 & 43 Main Street North	0.09	82	7	0	1	5
Old railroad tract, no address	1.65	82	134	7	27	101
7 Marathon Street	0.82	82	67	3	13	50
64 Main Street North	0.68	82	55	3	11	41
Total Hagersville			**519**	**26**	**104**	**391**

Cayuga

Address	Net Land Area (Hectares)	Average Density (units per Net Hectares)	Unit Yield	Low	Medium	High
39 Talbot Street West, 0 Ouse Street South, 3 Cayuga Street South, and 29 Talbot Street West	0.49	82	40	2	8	30
40 - 42 Talbot Street West and 8 Ouse Street North	0.47	82	38	2	8	29
5 Talbot Street West	0.40	82	33	2	7	25
2, 4, 6, 8 Talbot Street West	0.30	82	24	1	5	18
4, 6, 8 Talbot Street East	0.26	82	21	1	4	16
18 Talbot Street East	0.97	82	79	4	16	59
11 and 13 Talbot Street East	0.12	82	10	1	2	8
Total Cayuga			**245**	**13**	**50**	**185**

Figure A-10
Haldimand County
Residential Intensification Potential (cont'd)

Residential Intensification Areas

Address	Net Land Area (Acres)	Net Land Area (Hectares)	Average Density (units per Net Hectares)	Unit Yield	Low	Medium	High
Dunnville							
305 Cedar, 111, 115, 119, 137 Broad Street East	1.7	0.69	82	56	3	11	42
418, 416, 0 Chestnut and back of 111 Alder Street East	0.91	0.37	82	30	2	6	23
216 and 220 South Cayuga Street East	0.94	0.38	82	31	2	6	23
302, 308, 310 - 312, 318 Alder Street East (houses), 310, 306 Tamarac Street (houses), 315 Broad Street East (house)	1.44	0.58	82	48	2	10	36
213, 215, 217 Maple Street East & 302, 304, 310 Broad Street East	0.51	0.21	82	17	1	3	13
315, 319 Queen Street, 206 and 208 Tamarac Street	0.35	0.14	82	12	1	2	9
312 Main Street East (automotive business), 138 Tamarac (old business), 126 Tamarac (Hines Electric), 115 Maple Street	2.15	0.87	82	71	4	14	53
129 Tamarac Street, 426 Main Street East, and vacant lot	2.81	1.14	82	93	5	19	70
218 Alder Street east (house), 316 Maple (apartment building), portion of 316 brod street east (plaza), 225 Broad Street East (house), 306 Broad Street East	1.18	0.48	82	39	2	8	29
Total Dunnville				**397**	**22**	**79**	**298**
Jarvis							
Address	**Net Land Area (Acres)**	**Net Land Area (Hectares)**	**Average Density (units per Net Hectares)**	**Unit Yield**	**Low**	**Medium**	**High**
12 - 14 Main Street East	0.49	0.20	82	16	1	3	12
5-7 Main Street East	0.47	0.19	82	16	1	3	12
2 Talbot Street West	0.32	0.13	82	11	1	2	8
4 Talbot Street West	0.68	0.28	82	22	1	4	17
12 Talbot Street West	0.7	0.28	82	23	1	5	17
2007 Main Street South	0.75	0.30	82	25	1	5	19
2004 Main Street South	0.62	0.25	82	20	1	4	15
15 Talbot Street West	0.22	0.09	82	7	0	1	5
2032 Main Street North	0.22	0.09	82	7	0	1	5
2014 Main Street South	0.49	0.20	82	16	1	3	12
2009 and 2013 Main Street South and 6 Dennis Street	0.75	0.30	82	25	1	5	19
18 Talbot Street East	0.25	0.10	82	8	0	2	6
17 Talbot Street East	0.38	0.15	82	13	1	3	10
2095 -2103 Main Street North	1.0	0.40	82	33	2	7	25
Total Jarvis				**242**	**12**	**48**	**182**
Total Haldimand County				**1,818**	**93**	**362**	**1,363**

Source: Haldimand County Planning Department as of September 2018.

Note: Based on vacant land area provided by Haldimand County. Unit yield assumption prepared by Watson & Associates Economists Ltd., 2019.

Appendix B
Haldimand County Summary of Designated Lands in Greenfield Areas and Employment Areas

Appendix B: Haldimand County Summary of Designated Lands in Greenfield Areas and Employment Areas

Figure B-1
Haldimand County
Summary of Designated Lands in Greenfield Area
by Urban Community

Urban Community	Residential (ha)				Non-Residential[1] (ha)				Total Inventory (ha)
	Occupied	Development Approvals[2]	Vacant (No Active Applications)	Sub-Total	Occupied	Development Approvals[2]	Vacant (No Active Applications)	Sub-Total	
Caledonia	40	175	28	243	0	6	9	15	258
Cayuga	9	4	21	34	1	0	1	2	36
Dunnville	3	1	16	20	0	0	0	0	20
Hagersville	1	44	48	93	0	0	0	0	93
Townsend	0	0	152	152	0	0	11	11	163
Jarvis	4	8	101	113	0	0	0	0	113
Haldimand County	57	231	366	655	1	6	22	29	683
	8%	**34%**	**54%**	**96%**	**0%**	**1%**	**3%**	**4%**	**100%**

Source: Watson & Associates Economists Ltd., 2019.

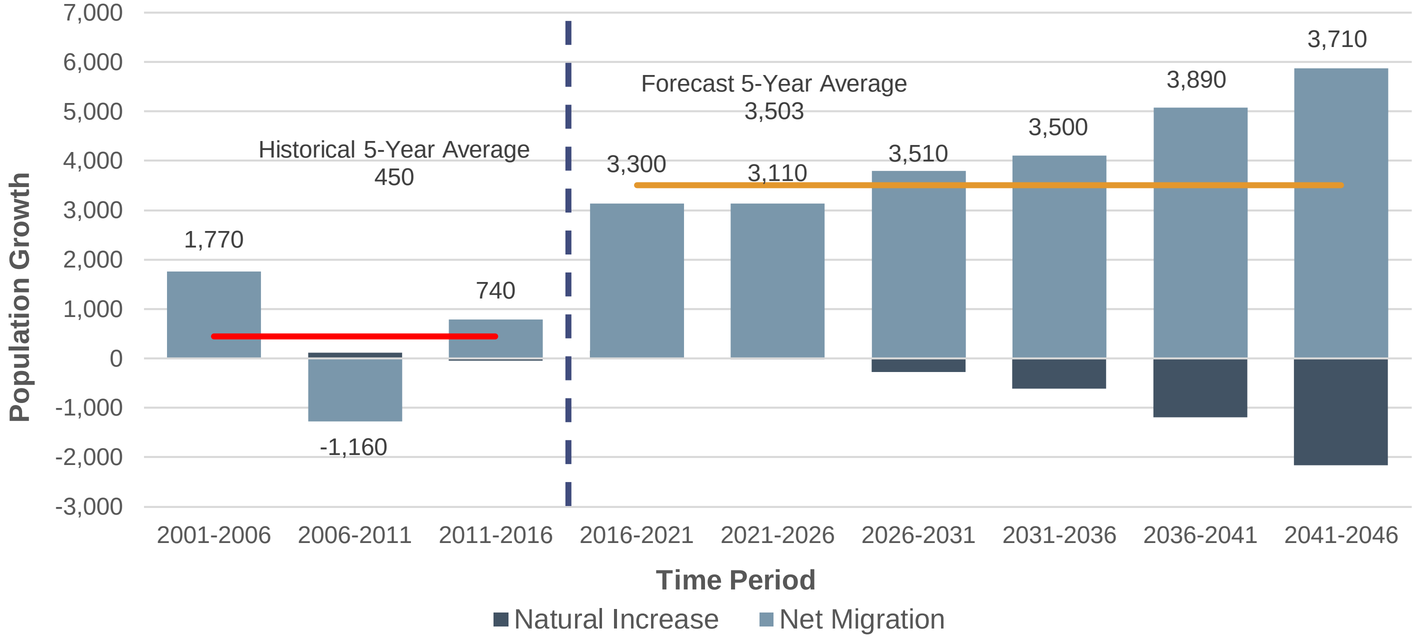
[1] Excludes lands that are designated Employment Areas (as identified in Schedule I of Haldimand County's Official Plan).

[2] Includes lands that are currently within the development process as identified by Haldimand County.

Appendix C
Haldimand County Components of Population Growth

Appendix C: Haldimand County Components of Population Growth

Figure C-1
Haldimand County
Population Growth, 2001 to 2046



Source: Data from Statistics Canada Demography Division (Catalogue no. 91C0005) and Vital Statistics Ontario. 2016 to 2046 forecast prepared by Watson & Associates Economists Ltd., 2019.
Note: Figures have been rounded.

Figure C-2
Haldimand County
Net Migration by Age Cohort
2001 to 2046

Total Net Migration

Age Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046
0-19	960	-50	870	1,420	1,220	1,480	1,550	1,830	1,860
20-34	-430	-1,270	-730	-90	100	210	230	330	420
35-44	510	-220	300	640	1,060	750	680	750	990
45-54	280	-130	180	500	360	660	800	920	980
55-74	230	150	250	430	340	700	860	1,070	1,060
75+	200	240	-90	200	110	70	50	50	50
Total	1,750	-1,280	780	3,100	3,190	3,870	4,170	4,950	5,360

Percentage of Net Migration

Age Cohort	2001-2006	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046
0-19	55%	4%	112%	46%	38%	38%	37%	37%	35%
20-34	-25%	99%	-94%	-3%	3%	5%	6%	7%	8%
35-44	29%	17%	38%	21%	33%	19%	16%	15%	18%
45-54	16%	10%	23%	16%	11%	17%	19%	19%	18%
55-74	13%	-12%	32%	14%	11%	18%	21%	22%	20%
75+	11%	-19%	-12%	6%	3%	2%	1%	1%	1%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: Historical data from Statistics Canada Demography Division (Catalogue no. 91C0005). 2016 to 2046 forecast prepared by Watson & Associates Economists Ltd., 2019.

Note: Numbers may not add up precisely due to rounding.

Figure C-3
Haldimand County
Headship Rates
2001 to 2046

Year	Total	Under 25	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75+ years
2001	0.3426	0.0177	0.3880	0.4808	0.5618	0.5460	0.5766	0.6440
2006	0.3457	0.0192	0.3946	0.4642	0.5343	0.5503	0.5900	0.5675
2011	0.3655	0.0161	0.3943	0.4886	0.5349	0.5618	0.5618	0.6077
2016	0.3742	0.0218	0.3650	0.4935	0.5275	0.5545	0.5979	0.6003
2021	0.3800	0.0218	0.3650	0.4935	0.5275	0.5545	0.5979	0.6003
2026	0.3837	0.0218	0.3650	0.4935	0.5275	0.5545	0.5979	0.6003
2031	0.3853	0.0218	0.3650	0.4935	0.5275	0.5545	0.5979	0.6003
2036	0.3864	0.0218	0.3650	0.4935	0.5275	0.5545	0.5979	0.6003
2041	0.3880	0.0218	0.3650	0.4935	0.5275	0.5545	0.5979	0.6003
2046	0.3915	0.0218	0.3650	0.4935	0.5275	0.5545	0.5979	0.6003

Source: 2001 to 2016 derived from Statistics Canada Census of Population data. 2016 to 2046 forecast prepared by Watson & Associates Economists Ltd., 2019.

Appendix D
Haldimand County Long-Term Forecast: Population, Housing and Employment

Appendix D: Haldimand County Long-Term Forecast: Population, Housing and Employment

Figure D-1
Haldimand County
Total Population and Household Forecast, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	46,000	44,900	14,790	910	1,090	16,840	2.67
2016	46,800	45,600	15,400	1,040	1,070	17,510	2.60
2021	50,100	48,800	16,580	1,220	1,230	19,030	2.56
2026	53,200	51,800	17,480	1,460	1,470	20,410	2.54
2031	56,700	55,300	18,390	1,720	1,740	21,850	2.53
2036	60,200	58,700	19,210	1,970	2,080	23,260	2.52
2041	64,100	62,500	20,030	2,290	2,540	24,860	2.51
2046	67,800	66,100	20,870	2,630	3,040	26,540	2.49
2016-2031	9,900	9,700	2,990	680	670	4,340	-0.07
2016-2041	17,300	16,900	4,630	1,250	1,470	7,350	-0.09
2016-2046	21,000	20,500	5,470	1,590	1,970	9,030	-0.11
2016-2031 Housing Mix			69%	16%	15%	100%	
2016-2041 Housing Mix			63%	17%	20%	100%	
2016-2046 Housing Mix			61%	18%	22%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Figure D-2
Haldimand County
Total Population by Age Cohort
2001 to 2046

Total Population

Age Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046
0-19	13,300	12,700	11,300	10,800	11,400	12,000	12,700	13,100	13,800	14,000
20-34	7,700	8,000	7,700	8,200	8,500	9,000	9,500	10,200	11,100	12,100
35-44	7,800	7,200	5,500	5,100	5,500	6,200	6,400	6,700	6,900	7,400
45-54	6,700	7,700	7,800	7,000	6,200	6,000	6,800	7,500	7,800	8,200
55-64	4,300	5,600	6,700	7,500	8,000	7,400	6,900	7,200	8,300	9,100
65-74	3,100	3,200	3,900	5,000	6,200	7,100	7,600	7,400	7,000	7,500
75+	2,600	2,900	3,200	3,300	4,300	5,500	6,800	8,100	9,100	9,500
Total	45,500	47,300	46,100	46,900	50,100	53,200	56,700	60,200	64,000	67,800

Percentage of Total Population

Age Cohort	2001	2006	2011	2016	2021	2026	2031	2036	2041	2046
0-19	29%	27%	25%	23%	23%	23%	22%	22%	22%	21%
20-34	17%	17%	17%	17%	17%	17%	17%	17%	17%	18%
35-44	17%	15%	12%	11%	11%	12%	11%	11%	11%	11%
45-54	15%	16%	17%	15%	12%	11%	12%	12%	12%	12%
55-64	9%	12%	15%	16%	16%	14%	12%	12%	13%	13%
65-74	7%	7%	8%	11%	12%	13%	13%	12%	11%	11%
75+	6%	6%	7%	7%	9%	10%	12%	13%	14%	14%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: Historical data from Statistics Canada Demography Division (Catalogue no. 91C0005). 2016 to 2046 forecast prepared by Watson & Associates Economists Ltd., 2019.

Note: Numbers may not add up precisely due to rounding.

Figure D-3
Haldimand County
Total Employment Forecast by Urban Area and Remaining Rural Area, 2016 to 2046

Period	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Urban Areas Total	Rural Areas	Haldimand County
2016-2021	610	70	90	120	10	30	930	250	1,180
2016-2026	1,230	130	190	250	20	70	1,890	590	2,480
2016-2031	2,080	220	320	420	30	130	3,200	940	4,140
2016-2036	2,760	300	430	550	40	170	4,250	1,370	5,620
2016-2041	3,600	390	550	720	60	220	5,540	1,820	7,360
2016-2046	3,860	420	590	770	60	240	5,940	2,140	8,080
Share of Employment Growth									
2016-2041	49%	5%	7%	10%	1%	3%	75%	25%	100%
2016-2046	48%	5%	7%	10%	1%	3%	74%	26%	100%

Source: Watson & Associates Economists Ltd., 2019.
Note: Total employment numbers include work at home and no fixed place of work. Numbers may not add up precisely due to rounding.

Figure D-4
Haldimand County
Total Employment Growth Forecast by Area, 2018 to 2041

Period	Caledonia	Cayuga	Dunnville	Hagersville	Townsend	Jarvis	Total Urban Employment	Rural Areas	Haldimand County
Rural Areas	0	0	0	0	0	0	0	1,600	1,600
Employment Areas	1,420	280	350	180	0	60	2,290	0	2,290
Community Areas	1,850	70	150	470	50	140	2,730	0	2,730
Employment Growth, 2018 to 2041	3,270	350	500	650	50	200	5,020	1,600	6,630

Source: Watson & Associates Economists Ltd., 2019.
Note: Total employment numbers include work at home and no fixed place of work. Numbers may not add up precisely due to rounding.

Figure D-5
Caledonia
Total Population and Household Forecast, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	10,300	10,000	3,020	200	300	3,520	2.84
2016	10,900	10,600	3,230	230	280	3,750	2.83
2021	12,800	12,500	3,810	350	380	4,550	2.75
2026	14,900	14,500	4,240	520	580	5,350	2.71
2031	17,100	16,700	4,710	710	790	6,220	2.68
2036	19,300	18,800	5,130	890	1,060	7,090	2.65
2041	21,800	21,200	5,540	1,120	1,450	8,120	2.61
2046	24,500	23,900	6,000	1,370	1,870	9,250	2.58
2016-2031	6,200	6,100	1,480	480	510	2,470	-0.14
2016-2041	10,900	10,600	2,310	890	1,170	4,370	-0.22
2016-2046	13,600	13,300	2,770	1,140	1,590	5,500	-0.24
2016-2031 Housing Mix			60%	19%	21%	100%	
2016-2041 Housing Mix			53%	20%	27%	100%	
2016-2046 Housing Mix			50%	21%	29%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Figure D-6
Cayuga
Total Population and Household Forecast, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	1,700	1,600	500	100	90	690	2.32
2016	1,900	1,800	520	90	100	720	2.50
2021	2,200	2,100	620	100	100	830	2.53
2026	2,400	2,300	700	110	110	930	2.47
2031	2,700	2,600	770	120	120	1,020	2.55
2036	2,900	2,800	830	130	130	1,100	2.55
2041	3,100	3,000	890	150	140	1,190	2.52
2046	3,300	3,200	930	160	160	1,260	2.54
2016-2031	800	800	250	30	20	300	0.05
2016-2041	1,200	1,200	370	60	40	470	0.02
2016-2046	1,400	1,400	410	70	60	540	0.04
2016-2031 Housing Mix			83%	10%	7%	100%	
2016-2041 Housing Mix			79%	13%	9%	100%	
2016-2046 Housing Mix			76%	13%	11%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Figure D-7
Dunnville
Total Population and Household, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	5,900	5,800	1,790	300	420	2,510	2.31
2016	6,100	5,900	1,830	320	450	2,610	2.26
2021	6,300	6,200	1,920	330	490	2,750	2.25
2026	6,500	6,400	2,000	350	500	2,860	2.24
2031	6,800	6,600	2,080	360	510	2,960	2.23
2036	7,000	6,800	2,140	370	520	3,040	2.24
2041	7,200	7,000	2,210	390	540	3,150	2.22
2046	7,400	7,200	2,260	400	550	3,220	2.24
2016-2031	700	700	250	40	60	350	-0.03
2016-2041	1,100	1,100	380	70	90	540	-0.04
2016-2046	1,300	1,300	430	80	100	610	-0.02
2016-2031 Housing Mix			71%	11%	17%	100%	
2016-2041 Housing Mix			70%	13%	17%	100%	
2016-2046 Housing Mix			70%	13%	16%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Figure D-8
Hagersville
Total Population and Household Forecast, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	2,600	2,600	770	170	120	1,060	2.45
2016	3,100	3,100	820	220	110	1,150	2.70
2021	3,900	3,800	1,090	250	110	1,450	2.62
2026	4,500	4,300	1,240	280	130	1,650	2.61
2031	5,000	4,900	1,380	310	160	1,850	2.65
2036	5,500	5,400	1,500	340	190	2,030	2.66
2041	6,000	5,900	1,620	380	220	2,220	2.66
2046	6,500	6,300	1,740	420	260	2,420	2.60
2016-2031	1,900	1,800	560	90	50	700	-0.05
2016-2041	2,900	2,800	800	160	110	1,070	-0.04
2016-2046	3,400	3,200	920	200	150	1,270	-0.09
2016-2031 Housing Mix			80%	13%	7%	100%	
2016-2041 Housing Mix			75%	15%	10%	100%	
2016-2046 Housing Mix			72%	16%	12%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Figure D-9
Townsend
Total Population and Household Forecast, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	1,200	1,200	320	20	60	400	3.00
2016	1,000	1,000	410	10	50	470	2.13
2021	1,100	1,000	430	20	50	500	2.00
2026	1,100	1,100	440	20	60	520	2.12
2031	1,200	1,100	450	30	60	540	2.04
2036	1,200	1,200	460	30	60	550	2.18
2041	1,200	1,200	470	30	70	570	2.11
2046	1,300	1,200	470	40	70	580	2.07
2016-2031	200	100	40	20	10	70	-0.09
2016-2041	200	200	60	20	20	100	-0.02
2016-2046	300	200	60	30	20	110	-0.06
2016-2031 Housing Mix			57%	29%	14%	100%	
2016-2041 Housing Mix			60%	20%	20%	100%	
2016-2046 Housing Mix			55%	27%	18%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Figure D-10
Jarvis
Total Population and Household Forecast, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	2,600	2,500	700	90	120	910	2.75
2016	2,000	2,000	710	80	100	890	2.25
2021	2,200	2,100	730	90	100	920	2.28
2026	2,300	2,200	770	90	110	970	2.27
2031	2,400	2,300	800	100	110	1,010	2.28
2036	2,500	2,400	830	110	120	1,060	2.26
2041	2,600	2,600	860	130	130	1,120	2.32
2046	2,700	2,700	880	140	140	1,160	2.33
2016-2031	400	300	90	20	10	120	0.03
2016-2041	600	600	150	50	30	230	0.07
2016-2046	700	700	170	60	40	270	0.08
2016-2031 Housing Mix			75%	17%	8%	100%	
2016-2041 Housing Mix			65%	22%	13%	100%	
2016-2046 Housing Mix			63%	22%	15%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Figure D-11
Remaining Rural
Total Population and Household Forecast, 2011 to 2046

Year	Population		Housing				Persons Per Unit
	Include Undercount	Exclude Undercount	Low Density[1]	Medium Density[2]	High Density[3]	Total	
2011	21,700	21,200	7,750	30	0	7,780	2.72
2016	21,800	21,200	7,850	50	0	7,960	2.66
2021	21,800	21,200	7,960	50	0	8,070	2.63
2026	21,600	21,100	8,080	50	0	8,190	2.58
2031	21,800	21,200	8,190	50	0	8,300	2.55
2036	22,000	21,400	8,310	50	0	8,420	2.54
2041	22,200	21,600	8,430	50	0	8,540	2.53
2046	22,300	21,700	8,570	50	0	8,680	2.50
2016-2031	0	0	340	0	0	340	-0.11
2016-2041	400	400	580	0	0	580	-0.13
2016-2046	500	500	720	0	0	720	-0.16
2016-2031 Housing Mix			100%	0%	0%	100%	
2016-2041 Housing Mix			100%	0%	0%	100%	
2016-2046 Housing Mix			100%	0%	0%	100%	

Source: Watson & Associates Economists Ltd., 2019.

[1] Singles & semi-detached

[2] Includes townhouses and apartments in duplexes

[3] Includes bachelor, 1-bedroom and 2-bedroom apartments

Note: Census undercount estimated at approximately 2.6%. Numbers may not add up precisely due to rounding.

Appendix E
Employment Land Survey

Appendix E: Employment Land Survey

Urban Area	Street Address	Occupant	Employment Sector	Employees	Employment Area Type	Land Area (net ha)	Net Employment Density (jobs/net ha)	Gross Employment Density (jobs/gross ha)
Caledonia	187 Argyle St. N.	Food Basics	Retail/Commercial Services	35	Non-Core	1.3	27	22
Caledonia	228 Argyle St. N.	Grand River Veterinary Hospital	Retail/Commercial Services	20	Non-Core	0.3	70	59
Caledonia	221 Argyle St. N.	Econo Tech	Retail/Commercial Services	10	Non-Core	0.3	39	32
Caledonia	50 Orkney St. E.	Nestle Purina Canada	Manufacturing	62	Non-Core	2.4	26	22
Caledonia	225 Argyle St. N.	State Farm	Retail/Commercial Services	6	Non-Core	0.1	65	54
Caledonia	1 Alabastine Ave./219 Argyle St. N	Cindora Auto	Retail/Commercial Services	5	Non-Core	1.0	5	4
Caledonia	8 Gypsum Ave.	Multi-Tentant - Gym on Gypsum & Caledonia Dance Studio	Retail/Commercial Services	27	Non-Core	0.9	31	26
Caledonia	6 Alabastine Ave.	Multi-Tenant - Neptune Water, Auto Glass and Auto Repair	Mixed Industrial and Commercial	13	Non-Core	0.4	35	29
Caledonia	250 Argyle St. N.	Multi-Tenant - Coach Pyramids, Day Spa, Clothing Store	Retail/Commercial Services	18	Non-Core	0.6	30	25
Caledonia	269 Argyle St. N.	4 Wheels	Retail/Commercial Services	5	Non-Core	0.4	14	11
Caledonia	290 Argyle St. N.	Metal Works & Gourmet Pet Treats Inc.	Manufacturing	11	Non-Core	0.6	20	17
Caledonia	172 Argyle St. N.	Tim Hortons	Retail/Commercial Services	25	Non-Core	0.2	119	99
Caledonia	172 Argyle St. N.	Multi-Tenant (bank, retail stores and commercial services)	Retail/Commercial Services	35	Non-Core	0.8	45	38
Caledonia	116 Haldimand Rd. 66	Drummond Manufacturing	Manufacturing	15	Non-Core	0.4	35	29
Caledonia	457 Argyle St. N.	John Broeders Machine Co. Ltd.	Manufacturing	8	Core	1.1	8	6
Caledonia	15 Alabastine Ave.	Nicholson & Cates Ltd/Wesont Lumber/Britannia Lumber	Manufacturing	40	Core	10.2	4	3
Caledonia	200 Greens Dr.	Mortons Furniture & Woodworking	Manufacturing	3	Core	0.4	7	6
Caledonia	126 Haldimand Rd. 66	TN Welding & Mechanical Ltd.	Manufacturing	15	Core	0.4	37	31
Caledonia	595 Argyle St. N.	Lectro-Net Canada Ltd.	Wholesale	5	Core	0.2	22	18
Caledonia	611 Argyle St. N.	Ancaster Conveying Systems Ltd.	Manufacturing	50	Core	0.6	86	72
Caledonia	15 Greens Rd.	Southern Ontario Auto/Aldershot Equipment	Wholesale	15	Core	0.7	20	17
Caledonia	21/17 Industrial Dr.	Transport Sales & Service	Transportation, Logistics & Warehousing	130	Core	1.7	75	63
Caledonia	23 Industrial Dr.	Schilthuis Group of Companies	Construction	21	Core	0.7	29	25
Caledonia	186 Greens Road.	The Clark Companies	Agri-Business	75	Core	3.0	25	21
Caledonia	25 Industrial Dr./27 Industrial Dr.	Lawry Shooting Sports Inc.	Retail/Commercial Services	15	Core	1.3	12	10
Caledonia	29 Industrial Dr.	Binbrook Auto Sales	Retail/Commercial Services	10	Core	2.2	4	4
Caledonia	2 Greendale Dr.	Tim-br Mart	Retail/Commercial Services	25	Core	0.8	33	27
Caledonia	1 Greendale Dr.	Haldimand County Hydro	Utilities	45	Core	1.2	38	32
Caledonia	107 Greens Rd.	Ontario Concrete Paving	Construction	5	Core	0.4	11	9
Caledonia	123 Greens Rd.	Caledonia Auto Supply	Wholesale	6	Core	0.2	29	24
Total Caledonia				**755**		**35**	**22**	**18**
Cayuga	12 Indian St. E.	deBoer Cabinets Inc.	Manufacturing	6	Core	0.6	10	8
Cayuga	86 Munsee St. N.	Ace Hardware	Retail/Commercial Services	15	Core	0.6	25	21
Cayuga	88 Talbot St. E.	Cayuga Displays Inc.	Manufacturing	50	Core	1.0	50	42
Total Cayuga				**71**		**2.2**	**32**	**27**
Jarvis	2151 Main St. N.	Timber Mart	Retail/Commercial Services	20	Core	0.5	44	36
Jarvis	116 Talbot St. E.	Devines Restaurant	Retail/Commercial Services	15	Core	0.9	18	15
Jarvis	2129 Main St. N.	IDA Cavanagh Pharmacy/Family Health Centre	Retail/Commercial Services	20	Core	0.1	309	258
Jarvis	85 Talbot St. E.	Capital Equipment Rentals	Wholesale/Manufacturing	25	Core	1.8	14	12
Jarvis	2120 Main St. N.	Tim Hortons	Retail/Commercial Services	15	Core	0.4	39	32
Total Jarvis				**95**		**3.6**	**27**	**22**
Hagersville	4075 Highway 6	Don Hyde Marine	Retail/Commercial Services	10	Core	1.2	9	7
Hagersville	4075 Highway 6	New Credit Valley & Gas Bar	Retail/Commercial Services	50	Core	3.4	15	12
Hagersville	4023 Highway 6	Sitter Professional	Retail/Commercial Services	6	Core	2.0	3	3
Hagersville	4011 Highway 6	Koala T. Care Daycare/Peterbilt	Mixed Industrial and Commercial	60	Core	3.8	16	13
Hagersville	2993 Conc 12	PetroCanada	Retail/Commercial Services	5	Core	0.4	14	12
Hagersville	128 King St E	Hewitt's Dairy Ltd.	Manufacturing	50	Non-Core	1.2	43	36
Total Hagersville				**181**		**11.9**	**15**	**13**
Dunnsville	112 Ramsey Dr.	Arfab	Manufacturing	7	Core	0.3	23	19
Dunnsville	220 Ramsey Dr.	BJ Take Inc.	Wholesale	60	Core	2.0	30	25
Dunnsville	2-330 Ramsey Dr.	Tatra Safety Boots & Shoes	Manufacturing	6	Core	0.7	9	7
Dunnsville	705 Main St E.	D M Precision Products	Manufacturing	12	Core	0.5	25	21
Dunnsville	701 Broad St E.	Original Foods Ltd.	Manufacturing	150	Core	4.7	32	27
Dunnsville	210 Park Ave E.	Niaskoka Industrial Solutions	Manufacturing	6	Core	0.6	10	8
Dunnsville	205 Forest St E.	Silverthorne Refractories Inc.	Manufacturing	7	Core	1.8	4	3
Dunnsville	200 Ramsey Dr.	Turkstra Lumber	Manufacturing	9	Core	0.8	12	10
Dunnsville	722 Broad St. E.	Freds Work Wear	Retail/Commercial Services	5	Non-Core	0.3	18	15
Dunnsville	936 Broad St. E.	Tim Hortons	Retail/Commercial Services	25	Non-Core	0.5	47	39
Dunnsville	1051 Broad St. E.	Home Hardware	Retail/Commercial Services	40	Non-Core	3.8	11	9
Dunnsville	1012 Broad St. E.	Sobeys	Retail/Commercial Services	49	Non-Core	1.3	39	32
Dunnsville	1002 Broad St. E.	Canadian Tire	Retail/Commercial Services	65	Non-Core	1.9	35	29
Total Dunnsville				**441**		**19.1**	**23**	**19**
Total Employment Lands				**1,543**		**71.4**	**22**	**18**
Core Employment Lands				**1,022**		**53.0**	**19**	**16**
Non-Core Employment Lands				**521**		**18.4**	**28**	**24**

Source: Watson & Asssociates Economists Ltd. Employment data derived from InfoCanada Business Directory and Scott's Industrial Directory.