

# TOWN OF CALEDON

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## EMPLOYMENT LAND NEEDS STUDY

Council Workshop

November 11, 2008

# AGENDA

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- **Introduction/Background**
- **Watson & Assoc. Revised Employment Land Needs**
- **Policy Context and Next Steps**
  - **Places to Grow and PROPR policy directions**
  - **PROPR Process and Timelines**
- **Council Discussion**

# OUTLINE: Watson Presentation

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- **Intro/Background**
- **Summary of Comments Received**
- **2006 Census Employment**
- **Recent Development Trends on Employment Lands in Caledon**
- **Revisions to Employment Land Needs Analysis**

# Introduction

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- ❑ Employment Land Needs Study Undertaken by Watson & Associates Economists Ltd.
- ❑ Objective of study is to analyze the adequacy of the existing employment land supply in Caledon and determine the need to designate new employment areas from 2008-2031.
- ❑ Draft study released September 25, 2007 and presented at the Public Information Meeting November 12, 2007.
- ❑ Council Workshop held on February 19, 2008.
- ❑ Employment forecasts prepared by Watson in OPA 203 and the Employment Land Needs Study are being used as Caledon's input into the Region's Official Plan Review

# Summary of Comments Received

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## □ South Albion-Bolton

- Recommended adjustments and feedback from landowner groups regarding draft employment land location options in South Albion-Bolton.

## □ Mayfield West

- Additional employment lands are needed in Mayfield West prior to 2021.

## □ Tullamore

- Additional Lands are needed in Tullamore on both east and west side of Airport Rd.

# Summary of Comments Received

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## □ Victoria and Sandhill

- Weston Consulting Group Inc. - Requesting and expansion to Victoria and Sandhill of 549 acres and 24 acres, respectively.
- Weston has provided a report by urbanMetrics titled *“Dry Industrial Land Needs Analysis, Communities of Victoria and Sandhill.”*

# Summary of Comments Received

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## □ Region of Peel

- No formal comments received to date.
- Informal comments received from MKI (Region of Peel Consultant), including:
  - Employment forecast appears aggressive;
  - Mayfield West density assumptions appear high; and
  - Annual employment absorption levels appear reasonable.

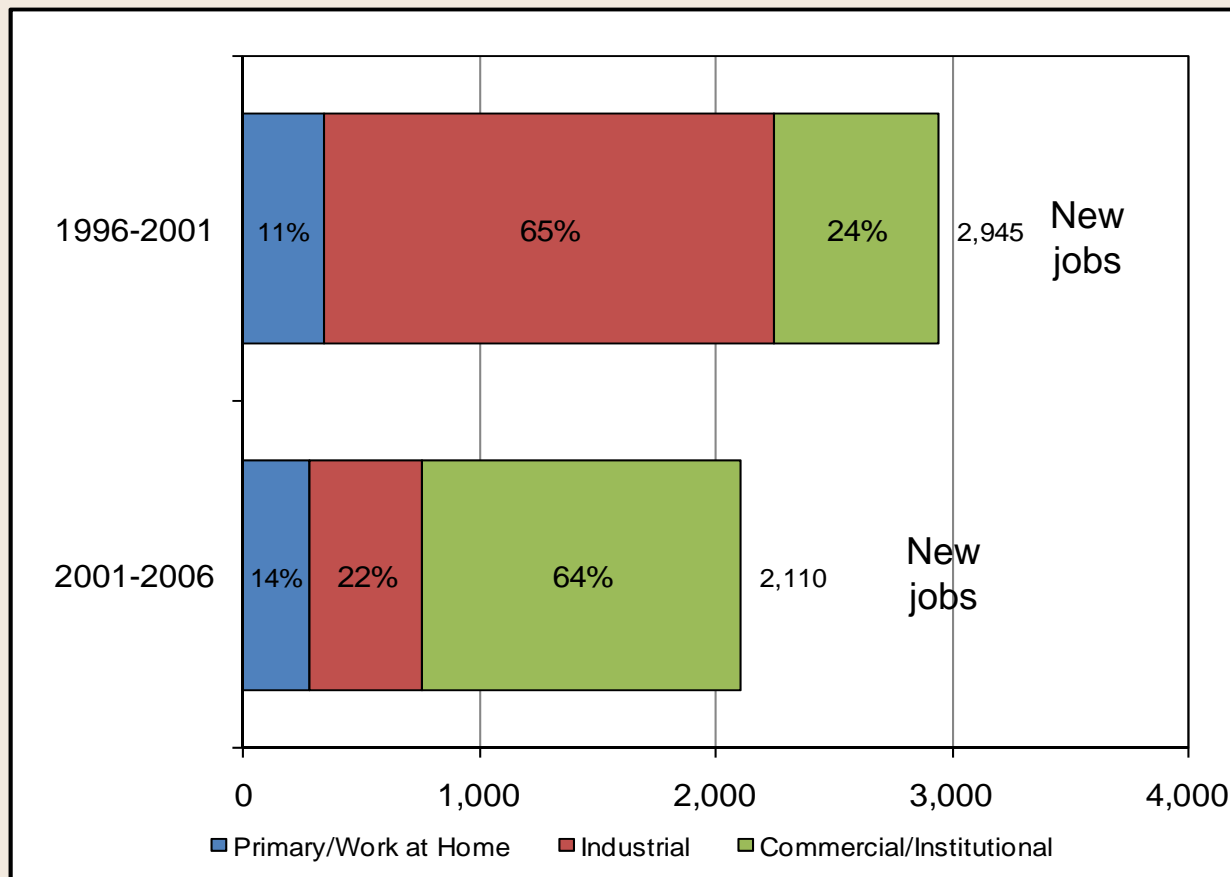
# 2006 Census Employment

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- Caledon's employment base (i.e. jobs in Caledon) reached 18,550 in mid 2006 (as per 2006 Census).
- This represents an increase of approx. 2,100 employees from 2001.
- Comparatively the 2006 Census employment number is 2,350 jobs less than W&A's 2006 estimate (20,890) as per Sept. 2007 Draft Report.

# 2006 Census Employment

- Components of 1996-2001 vs. 2001-2006 Employment Growth in Caledon

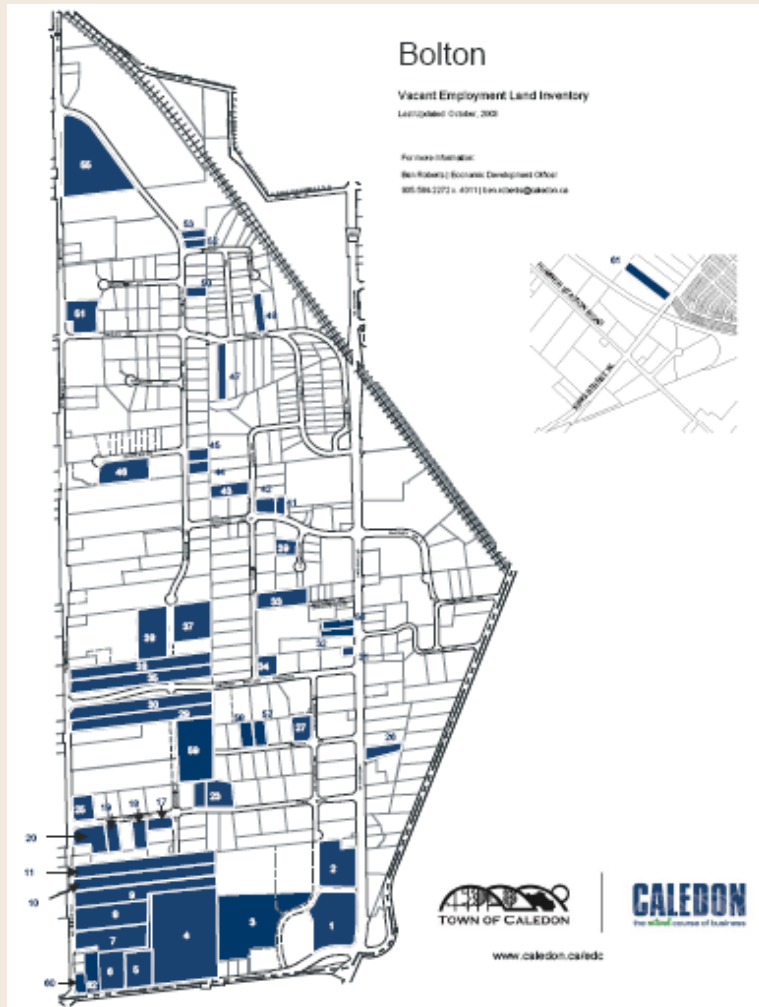


# Recent Development Trends on Employment Lands in Caledon

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- Recent demand for employment lands in Bolton and Tullamore have been very strong.
  
- From June 2007 to April 2008 the Town has absorbed approx. 106 net acres (43 Ha) of employment on employment lands.
  
- The majority of recent development activity on the Town's employment lands has been dominated by the warehousing/distribution and transportation sector.
  - e.g. AMB, Giffels, Solmar, Pillsworth, Great West Life (GWL).

# Recent Development Trends on Employment Lands in Caledon



- Bolton Industrial Area
  - Supply of developable employment lands, as of October 2008.

# Recent Development Trends on Employment Lands in Caledon

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- Based on discussions with Town staff, 70% of the vacant land inventory (approx. 100 Ha) in Mayfield West has been purchased by land owners with interest in developing this area for warehousing and distribution purposes.
- Interest also exists to develop the remaining 30% for similar purposes.

# Revisions to Employment Land Needs Analysis

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## Long Term Employment Forecast

- ❑ No adjustments are recommended with respect to the Town's long term employment forecast.
- ❑ The long term employment growth outlook should be continually monitored every five years.

# Revisions to Employment Land Needs Analysis

## Employment Density on Employment Lands

- In accordance with recent development activity, stakeholder comments and anticipated development activity on vacant employment lands, W&A has moderately reduced the long term average employment density as follows:

Settlement Area	Sept. 2007 Draft Report	Recommended Final Report	Sept. 2007 Draft Report	Recommended Final Report
	(Emp./Net Acre)		(Emp./Net Hectare)	
Bolton South-Albion	12	12	30	30
Mayfield West	18	12	44	30
Tullamore	7	5	18	12
Remaining Rural	3	3	8	8
<b>Caledon Total <sup>1</sup></b>	<b>13</b>	<b>11</b>	<b>31</b>	<b>26</b>

1. Overall employment density is based on a weighted average.

# Revisions to Employment Land Needs Analysis

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## Employment Density on Employment Lands

- ❑ The revised forecast density levels on employment lands represent a “best fit” between market demand and local, Regional and Provincial policy objectives.
- ❑ Further efforts are required by the Town, Region and Province with respect to implementation of greenfield density targets in Peel Region.

# Revisions to Employment Land Needs Analysis

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## Dry Industrial Land Needs

- A total of 144 acres (58 Ha) of employment land are currently designated as “dry industrial land” in Victoria and Bolton.
- Over the past four years there has been no demand for dry industrial land in Caledon.
- Accordingly, there does not appear to be an immediate need to expand settlement area boundaries in Victoria and Sandhill to provide additional supply.

# Revisions to Employment Land Needs Analysis

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## Dry Industrial Land Needs

- Furthermore, there are a number of other factors which would suggest that it is premature to designate dry additional industrial lands in Caledon at this time, including:
  - OP Policy Objectives - Caledon OP (Section 5.10.7)  
*“Industrial/Commercial Centres will serve a complementary role to other settlements and will provide, at a small scale, a supportive function to the Rural Service Centres for industrial and commercial development.” (underlining added)*

# Revisions to Employment Land Needs Analysis

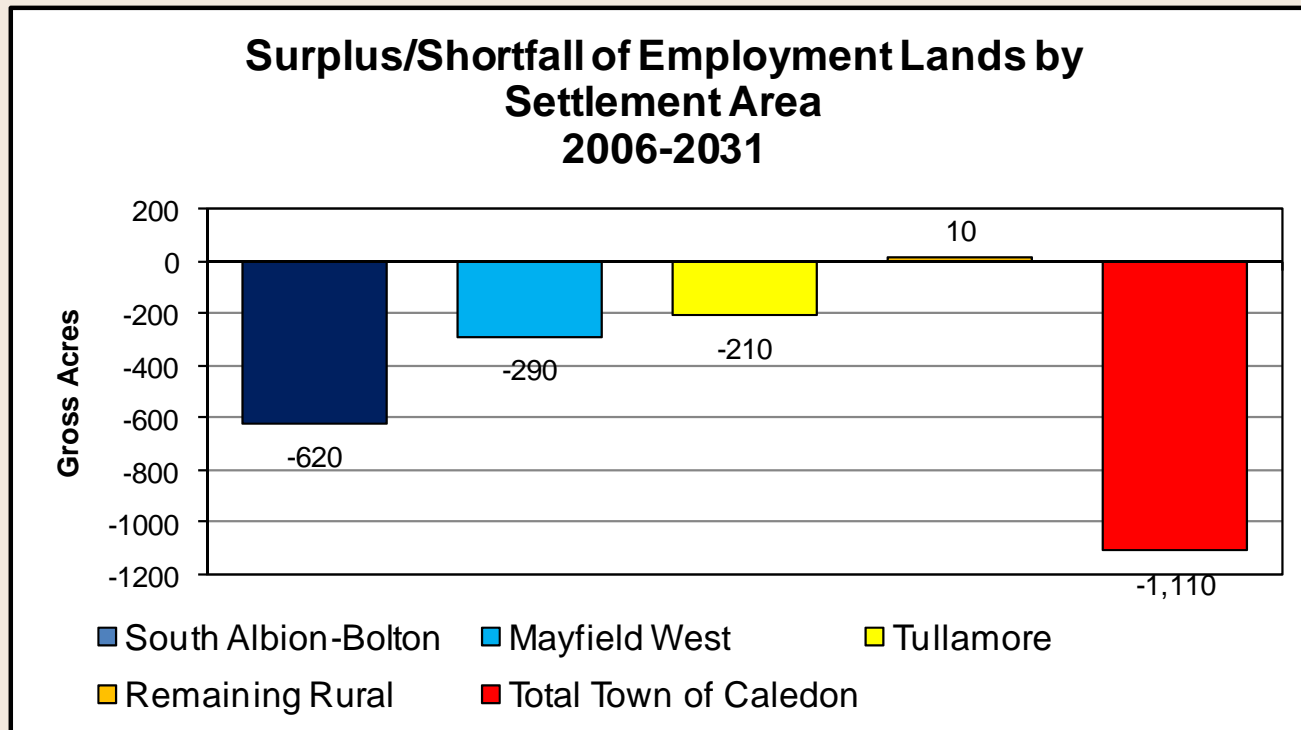
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## Dry Industrial Land Needs (Con't)

- Uncertainty with respect to the proposed routing of the East-West GTA Highway corridor.
- Impact on Caledon's role with respect to greenfield density targets.
- The Town should revisit the role of the Industrial/Commercial Centres (i.e. Victoria and Sandhill) for dry industrial lands in accordance with local needs and broader Town-wide growth objectives during subsequent comprehensive reviews.

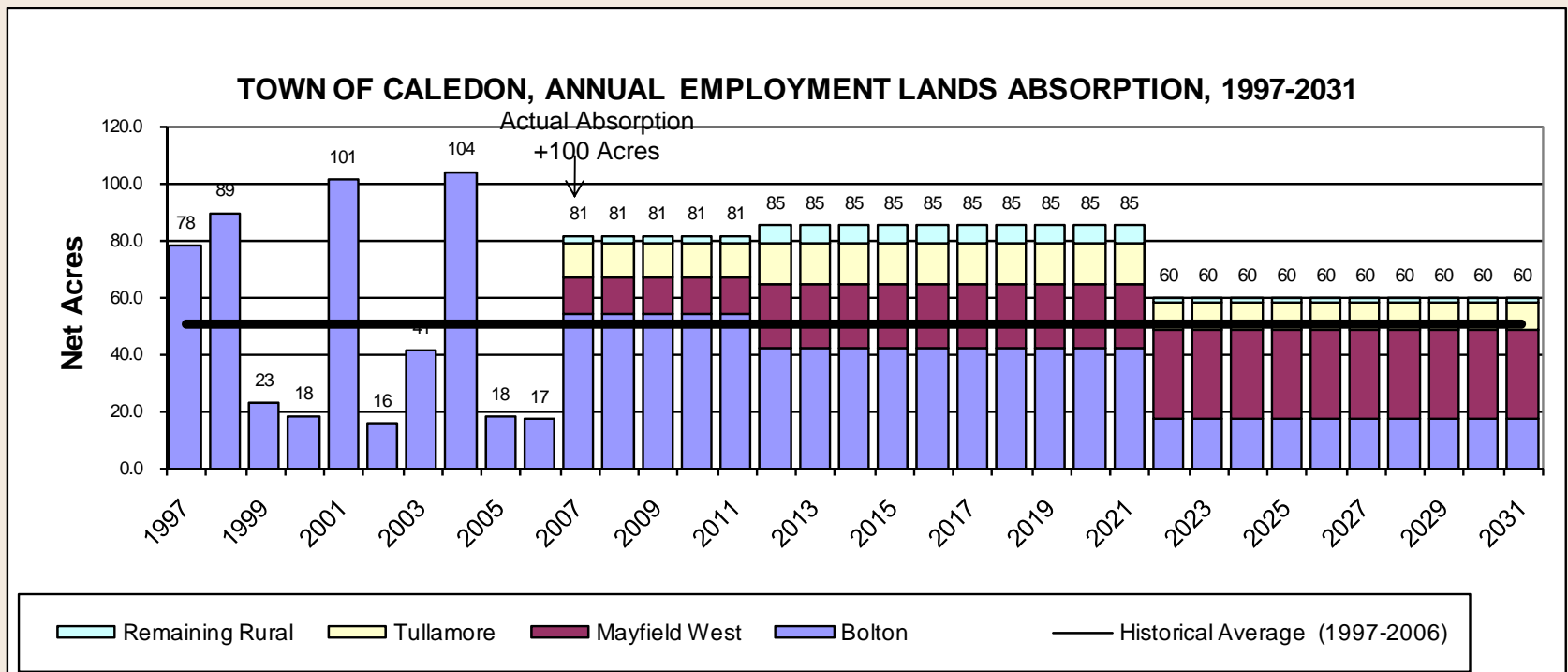
# Revisions to Employment Land Needs Analysis

- A shortfall of 1,110 gross acres (excluding environmental lands) of employment lands is forecast by 2031.
- This represents an increase of 370 gross acres (150 Ha) vs. Sept. 2007 Draft Report.



# Revisions to Employment Land Needs Analysis

- Revised annual employment lands absorption forecast (increase of approx. 15 gross acres per year as per Sept. 2007 Draft Report).



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# **TOWN OF CALEDON**

## **EMPLOYMENT LAND NEEDS STUDY**

**Staff Presentation**

**Council Workshop  
November 11, 2008**

# Policy Context

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- Regional Plan (ROP) and Caledon Official Plan must conform to Provincial Growth Plan (P2G) and other provincial policies/plans
- P2G policies affecting Caledon employment land:
  - Employment Forecast for Peel
  - Greenfield Density Target: 50 persons/jobs per ha
  - Maintaining an adequate supply; 20 years maximum (Provincially Significant Employment Areas may be identified beyond 2031)
  - Settlement expansion & conversion of employment land require a municipal comprehensive review

# PROPR: Regional OP Review

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- PROPR Growth Management Focus Area:
  - will allocate population to Area Municipalities to meet Regional forecasts established by the Province.
  - will determine how the provincial density target will be met Region-wide in Greenfield areas
- PROPR Employment Land Project:
  - will allocate employment numbers to Area Municipalities by employment type to meet Regional forecasts
  - will determine the Region's need for employment land
  - will ensure Area Municipalities contribute to Peel's employment land supply in conformity with P2G and ROP (Area Municipal land needs)

# PROPR: Regional OP Review

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## □ Other Key policy issues:

- Employment land conversion: ROP policy role and effect of conversion on employment land supply
- Settlement expansion: update study requirements in ROP policy 7.9.2.8 to conform to P2G
- Major Office: ROP policy response to P2G policy directing major offices to UGCs and transit stations
- Uses in employment areas: determined at local level, but ROP might address sensitive uses, major office and large scale retail
- Provincially Significant Employment Areas: lands along major routes could be identified as Strategic Employment Areas
- Density: policies to recognize low density employment areas and deal with density implications
- Complete Communities: Key ROP issue is population/employment balance

# PROPR: Regional OP Review

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- ❑ Employment and Employment Land Discussion Paper Oct. 17, 2008 issued for public comment
- ❑ Consultation with Economic Development staff Oct. 29, 2008
- ❑ Stakeholder Workshop on employment Nov. 14, 2008
- ❑ ROPA: draft March 2009, adoption June 2009
  
- ❑ PROPR will confirm Caledon's study or result in changes
- ❑ Area Municipal ROPAs not considered until June 2009

# Employment Forecasts

- Table of Current Area Municipal Employment Forecasts and comparison with P2G forecasts

Municipality	2006	Employment Forecasts*			Growth 2006-2031
		2011	2021	2031	
Brampton	155,000	203,000	274,000	320,000	165,000
Mississauga (2008)	450,000	472,000	495,000	502,000	52,000
Caledon	18,550	28,000	38,000	49,000	30,450
Total Peel	623,550	703,000	807,000	871,000	247,450
<b>Peel P2G Target</b>		<b>730,000</b>	<b>820,000</b>	<b>870,000</b>	<b>246,450</b>
Difference		-27,000	-13,000	1,000	

Sources:

Brampton: Preliminary Employment Forecasts May 23, 2008

Mississauga: Revised Growth Forecasts adopted by Council January 18, 2006

Caledon: OPA 203 endorsed by Council August 1, 2006 and November 6, 2007

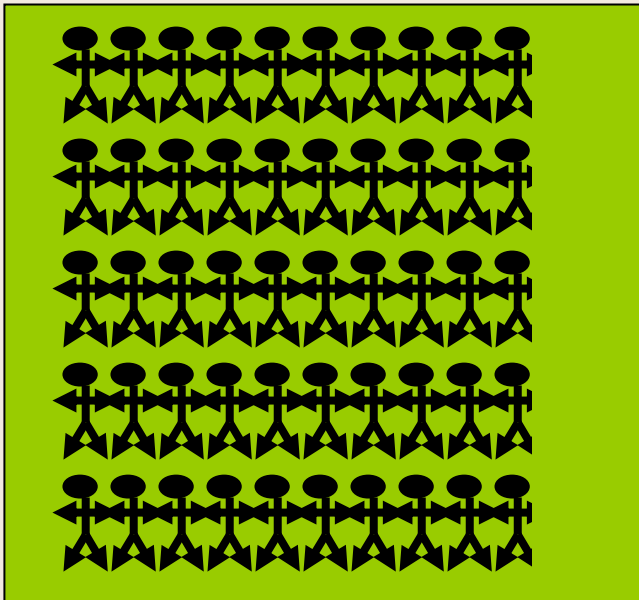
Note: All numbers have been rounded to the nearest 1,000

# Greenfield Density Target

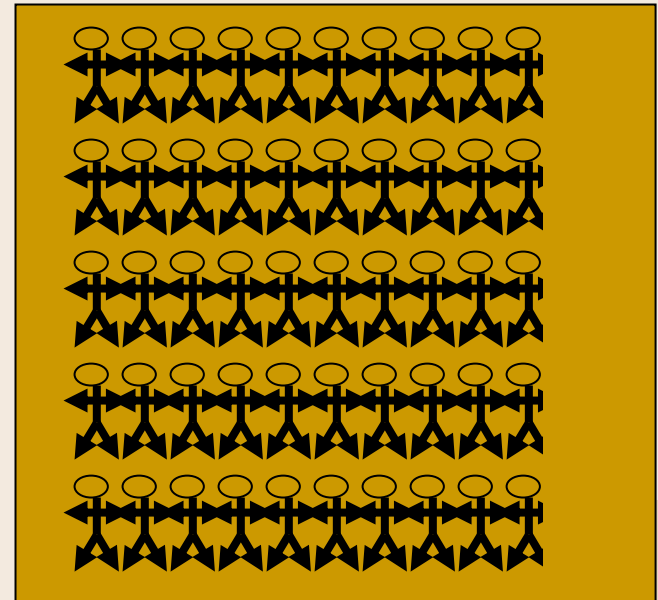
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- What the target of 50 persons/jobs per hectare means for employment land and residential densities.
- Provincial staff comments

50 residents/hectare



50 jobs/hectare



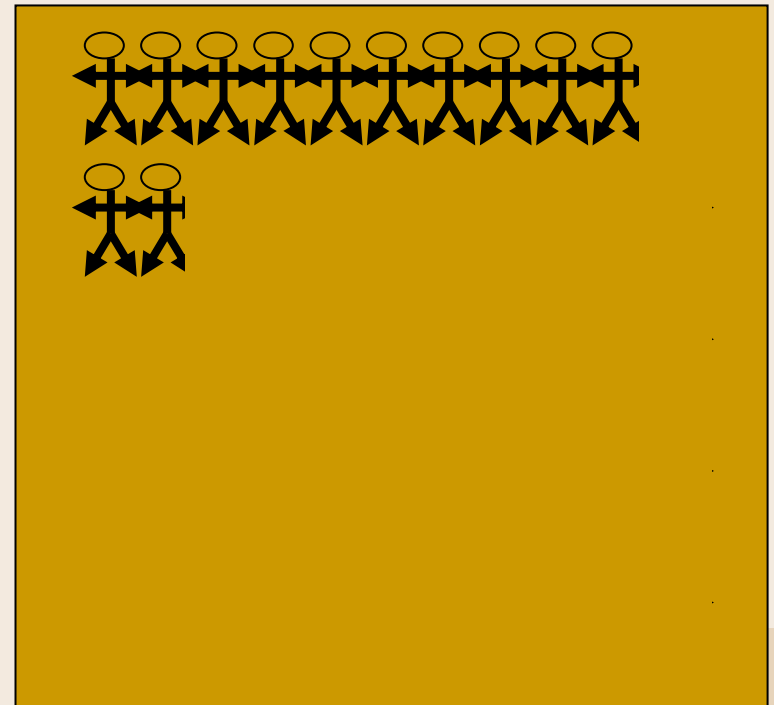
# Greenfield Density Target

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88 residents/hectare

Tullamore Example

12 jobs/hectare



# Provincial Review of Land Needs Calculation

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- Land Supply:
  - Structural vacancy
  - Net to Gross
  - Intensification
  - Market choice provision
- Non-Industrial Employment on employment lands
- Density: Province looking for higher employment densities than existing; need policies to plan for higher densities

# Conclusion

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- ❑ Land needs determined within a very prescriptive Provincial and Regional framework
- ❑ Land needs figure may appear conservative, but 20 year time frame provides a cushion against shortages
- ❑ Opportunity to review employment land needs every 5 years through 5-year Official Plan reviews and increase supply if needed

# Next Steps

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- ❑ Release of revisions to Employment Land Needs Study for public/stakeholder comment
- ❑ Present revisions at a Community Meeting in early 2009 along with Phase 1 Technical Studies for settlement expansion
- ❑ Participate in PROPR Employment Land Project: land needs analysis and policy directions for Region and Area Municipalities
- ❑ Review Caledon study based on PROPR and revise as necessary (March/April 2009)
- ❑ Caledon OPA follows ROPA adoption in mid-June 2009