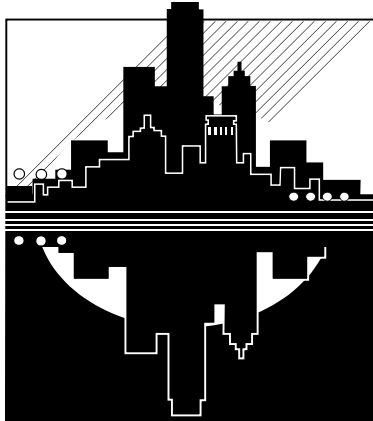


JOSEPH

URBAN CONSULTANTS



Research, Planning & Consulting

310 Glencairn Ave Toronto M5N 1T9

Tel. (416) 489-2388

E-mail: henryjoseph310@gmail.com

MARKET OPPORTUNITY & IMPACT ANALYSIS

Mixed Use Development – Retail Component

*N.E. Old Church Road & Atchison Drive
Caledon East Community
Town of Caledon, Ontario*

Prepared For:
CHATEAUX OF CALEDON CORPORATION
January 22, 2018

1.0 Introduction

Joseph Urban Consultants were asked to prepare a market opportunity and merchandising analysis assessing the need, opportunity and impact of the proposed amendments, recognizing existing and planned area commercial nodes and facilities. The potential retail shops will be located at the ground floor level of a five storey mixed-use residential/retail building framing an abutting Town Square to the south.

The overall development lands are located on the north side of Old Church Road immediately west of Innis Lake Road. The entire development parcel totals 34.75 hectares with the majority of lands intended for residential development. These units comprise 97 residential linked units, 226 residential single-detached units, 115 residential townhouses and 33 live/work units. With the exception of a few townhouses and the subject block, the entire property is built out. The majority of the frontage along Old Church Road is intended for mixed residential/commercial development.

2.0 Town of Caledon Official Plan

Town of Caledon Official Plan Section 5.4.3.1 –

Commercial development within the Town will be focused primarily in the Rural Service Centres of Mayfield West, Bolton and Caledon East in order to concentrate commercial retail and service facilities within the Town; maximize the opportunities to provide a wider range of shopping facilities to the residents; and, promote the recapturing of commercial retail/service dollar outflows from the Town.

Caledon East Secondary Plan Section 7.7.3 –

Airport Road and Old Church Road are the “Main Streets” of Caledon East.

Airport Road will continue as the commercial focus for the community, and three commercial areas have been identified within the Airport Road corridor.

A Community Focus Area has been identified on the north side of Old Church Road, which would consist of higher density mixed office/service commercial and residential development and a public open space in the form of a town square.

A mixed use corridor along the north side of Old Church Road has also been designated to permit office and personal service commercial uses on the ground floor of residential buildings.

Caledon East Secondary Plan Section 7.7.8.5.1 –

The purpose of the Community Focus Area is to strengthen the Old Church Road corridor by providing a “town square” as a public gathering place and to complement the existing Town Administrative Centre and surrounding open space.

Caledon East Secondary Plan Section 7.7.8.5.2 –

The mixed use building or buildings may contain office and personal service commercial uses, institutional uses and residential uses. A maximum of 650 m² of retail commercial use is permitted within Special Use Area C, abutting the intersection of Old Church Road and the main internal subdivision street.

2.0 Town of Caledon Zoning By-law

Definitions

Personal Service means a *premises* where health and grooming services are provided and may include a spa, a barber shop, a beauty salon, a dressmaking shop, a tailor, a pet grooming facility, a photographic studio, or similar use.

Retail Store means a *building* or part of a *building* in which goods, wares, merchandise, substances, articles or things including antiques, collectibles and convenience items are offered or kept for retail sale or rental to the public.

3.0 Area Demographics

Table 1 – The overall Town of Caledon has grown at a relatively strong rate with the majority of population growth occurring in the Bolton Community itself. The Town of Caledon is the third largest municipality in the Regional Municipality of Peel and will retain this status for the foreseeable future.

Table 2 – Population allocations within the Town of Caledon itself have been established in OPA no. 226. In the 2011 to 2031 period, the majority of population growth will occur within the rural service areas of Bolton, Caledon East and Mayfield West. Caledon East has been allocated future growth capacity to 8,654 persons by 2021.

4.0 Area Retail Structure

Table 3 – An analysis is provided of the existing merchandise mix in the Airport Road corridor adjacent to Old Church Road. The results show the range of retail uses one would normally expect in a smaller community setting such as this. The emphasis to date has been on convenience and personal service outlets with a very limited introduction of specialty retail. There are very few existing vacancies along the corridor. Area residents utilize these services on a day-to-day basis with less frequent convenience and specialty shopping trips to Bolton and/or Brampton.

Table 4 - As part of a Commercial Demand Study for the South Bolton - Albion Community Plan, Scott Morgan undertook a physical inventory of Bolton retail and personal service facilities. This area has emerged in the past several years as a medium and big box focal point for the surrounding market area including the remainder of the Town of Caledon. The floorspace per capita ratios have been analyzed to forecast floorspace expansion requirements associated with future population growth. The indices utilized exclude the Hwy 50 South area which is essentially box retail oriented and not a suitable proxy to be applied to Caledon East.

By way of contrast, we have included a similar summary of a Kircher Research Associates Ltd inventory carried out in Bolton in 2014 which includes retail expansion since the SMA inventory of 2008 and the Hwy 50 South area where most of it occurred. We continue to rely on the SMA indices as more indicative of the local serving nature of Caledon East existing and future retail facilities.

The relevant SMA indices are applied to future population growth in Caledon East itself to provide an indication of the potential commercial expansion potential. The site floorspace can then be put into perspective.

5.0 Future Retail Expansion

Table 5 – The forecast population growth for Caledon East has been combined with the discussed floorspace/capita ratios. The incremental population growth for example from 2016 to 2021 will generate the potential for an additional 31,528 sf of retail and service commercial floorspace.

Utilizing the selected competitive categories, the potential will be 23,759 sf of new floorspace by 2021 without any impact on existing retail facilities. It is quite evident that the requested permission, totaling less than 10,000 sf of retail floorspace, will satisfy approximately 40% of this additional potential.

6.0 Area Retail Concept

Table 6 – The overall residential development concept itself, on lands totaling approximately 34.75 hectares, will generate an additional population in excess of 1,000 new residents over the forecast period. This local retail demand, in the majority of municipal secondary plans, would be accommodated by a combination of integrated local commercial services (typically a small strip centre up to 15,000 sf in size) together with adjacent neighbourhood retail services (typically containing a supermarket and up to 75,000 sf in scale).

In this situation, the municipality desires to provide the larger scale services from the Airport Corridor commercial. However, the need for local retail facilities beyond the permitted personal services uses is also necessary.

7.0 Suggested Modifications

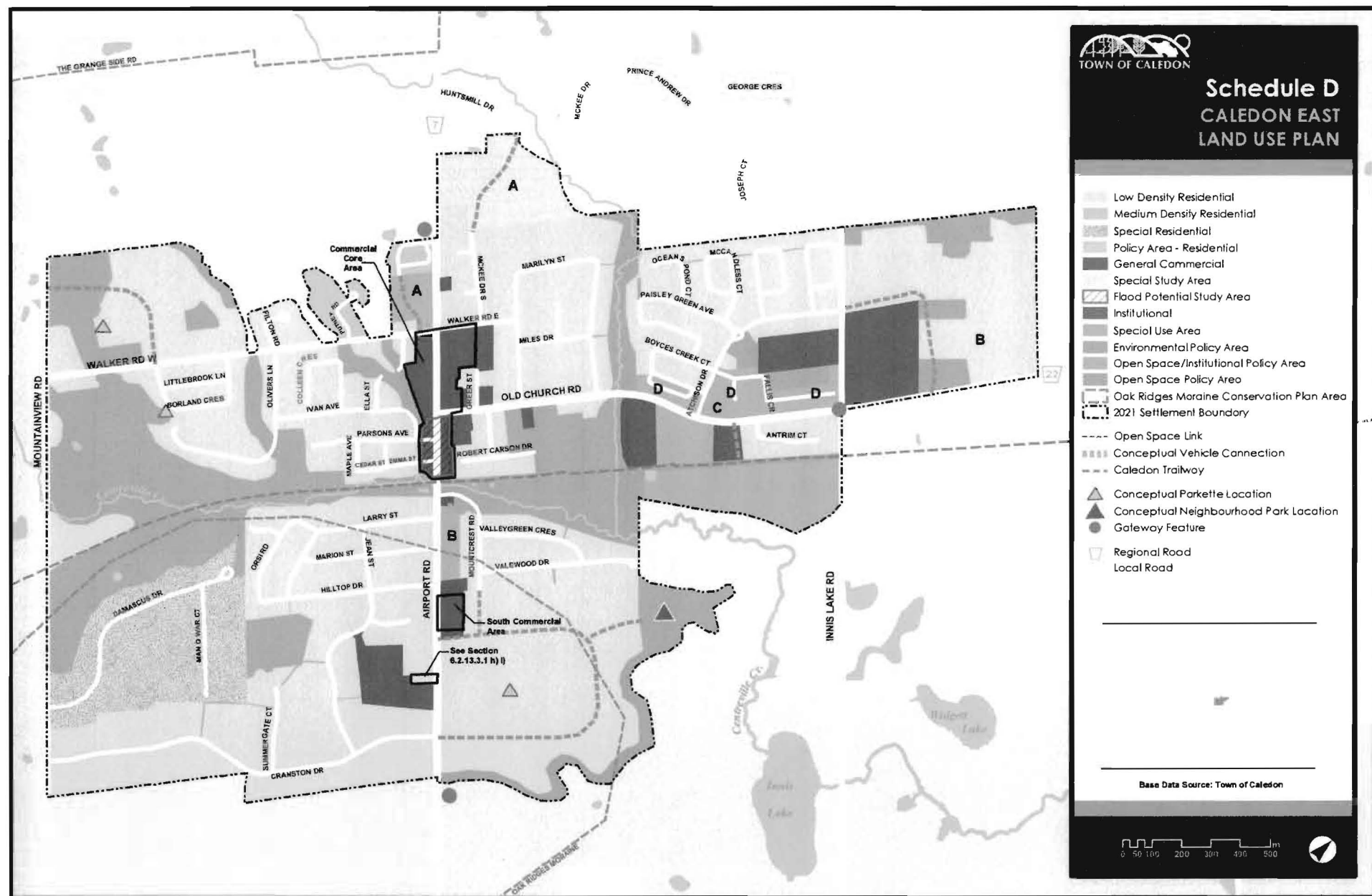
Table 7 – The Official Plan expressly excludes any retail uses along the Old Church Road corridor. If the municipality desires to have a vibrant and well utilized Town Square, it needs to expand the abutting uses beyond the concept of personal service uses. Such uses as barber shops, beauty salons, pet grooming facilities and copies shops will not provide a suitable extension of Town Square activities.

We suggest that:

- (1) Retail uses be permitted in from the policies for this specific node;
- (2) The Town introduce a specific list of retail uses acceptable to both the Town and the Developer which will enhance the Town Square atmosphere while minimizing any competitive effect on the Village's commercial core;
- (3) The Town recognize that these units are typically quite limited in size, reflecting the residential floor plate above. While the units sizes are dictated accordingly, the overall retail floorspace as contemplated could be capped at 9,500 sf, with no individual use larger than 2,000 sf;
- (4) The Town consider the following additional potential retail uses in the site specific by-law:

Specialty food, pharmacy, other general merchandise, apparel & accessories, home furnishings, restaurant, personal service, and other service uses, all totaling 9,500 sf

Report Submitted By: *Henry Joseph* President, Joseph Urban Consultants





CONCEPTUAL ONLY: CONTACT THE TOWN OF CALEDON FOR FINAL LOCATION OF SIDEWALKS, INFRASTRUCTURE, UTILITIES AND STREET TREES

EXISTING ESTATE RESIDENTIAL

OPEN SPACE

EXISTING RESIDENTIAL

EXISTING RESIDENTIAL

INNIS LAKE ROAD

EXISTING CATHOLIC
ELEMENTARY SCHOOL

EXISTING CATHOLIC
SECONDARY SCHOOL

STORM WATER MANAGEMENT FACILITY

OLD CHURCH ROAD

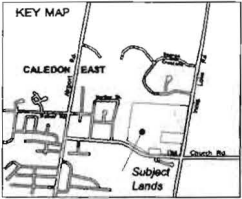
EXISTING RESIDENTIAL

COMMUNITY CENTRE ARENAS

TOWN OF CALEDON
ADMINISTRATIVE CENTRE &
SOCCER FIELDS

Scale:

25 0 25 50 75m



1. The plan of subdivision is not yet registered.
2. The construction of the homes cannot commence until after registration and the issuing of building permits (excluding mobile homes).
3. That notwithstanding the expectations of the vendors and purchasers of houses, it is possible that substantial delays could occur with respect to the registration of the plan of subdivision and the issuing of building permits, which may affect the ability of the vendors to perform their obligations under the plan as presented in any agreements of purchase and sale, and:
4. That purchasers are advised to consult their lawyer concerning any aspect of the Agreement of Purchase and Sale before signing it.
5. That all lots are intended to comply with Regional Wards.
6. That purchasers are advised that this plan may not accurately reflect final locations of the sidewalks, but sidewalks and utilities located within the rights of easements. Purchasers shall confirm the location of such with the Town of Caledon.
7. For further information on proposed and existing land use, please call the Town Development Approval and Planning Policy Department, between 9:30 am and 4:30 pm, telephone 905-866-2275.

Land Use Legend

- Single Detached Residential
- Linked Residential
- Future Townhouse Residential
- Future Live/Work, Townhouse Residential
- Village Centre Commercial / Mixed Use
- Primary & Secondary Schools
- Parks
- Storm Water Management Facility
- Open Space
- Subdivision Boundary
- Fineline Lot
- Walkway
- Lots with Winding Clause

Utilities

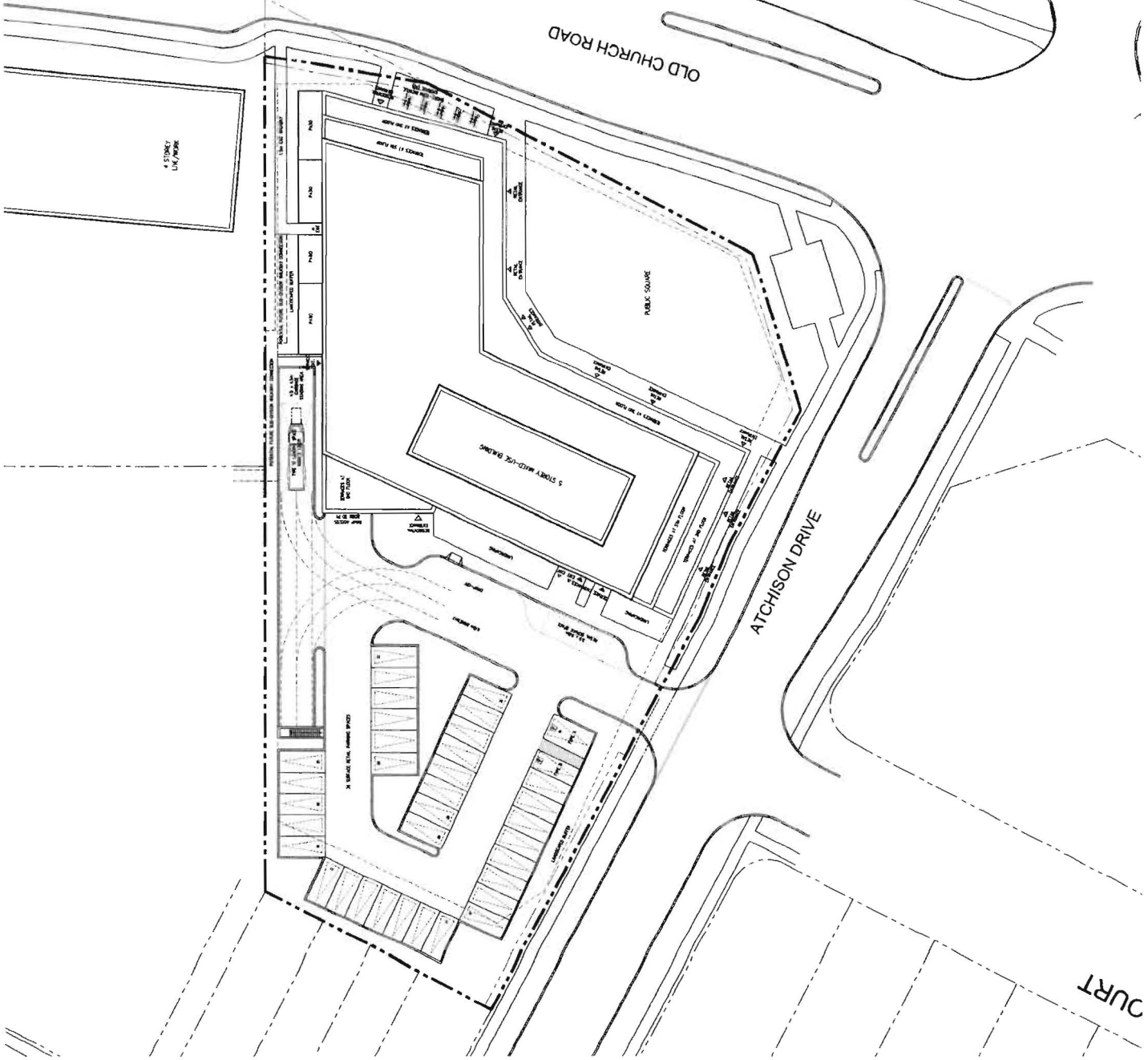
- Streetlight Pole
- Hydro One Transformer
- Hydant
- Rear Lot Catch Basin
- Canada Post Mail Boxes
- Rogers TV Processor
- Rogers Switching Box
- Bell Switching Box
- Sidewalk Locations
- 2.0m Wide Sidewalk Locations
- Parking Restrictions
- Retaining Wall
- Proposed 1.5m - 1.8m High Chain Link Fence
- Existing Chain Link Fence
- Proposed 1.5m High Decorative Fence
- Proposed 1.8m High Quality Wood Privacy Fence
- Acoustic Fencing

Planning & Development Consultant

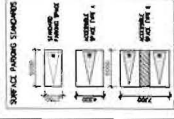
PAUL A. KING

18 West Beaver Creek
Richmond Hill, Ontario
L4B 1K3
Phone: 905.770-0232
Fax: 905.737-0419
Email: paul@paulking.com

THE PREPARATION OF THIS PLAN IS THE SOLE RESPONSIBILITY OF THE DEVELOPER. THE TOWN OF CALEDON IS NOT LIABLE FOR ANY CHANGES, ERRORS, OMISSIONS OR MISREPRESENTATIONS.



STATISTICS		DATE: 12/20/17	
1. ZONING	OS 100.1 (S-100)	5,900.00 sq	1.46
2. SITE AREA	64,000.00 sq	14,000.00 sq	1.46
3. UNIT FLOOR AREA	14,000.00 sq	14,000.00 sq	1.46
4. LANDSCAPE FLOOR AREA	14,000.00 sq	14,000.00 sq	1.46
5. PROPOSED BUILDING COVERAGE	14,000.00 sq	14,000.00 sq	1.46
6. LANDSCAPE AREA PROVIDED	14,000.00 sq	14,000.00 sq	1.46
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97. TOTAL AREA	14,000.00 sq	14,000.00 sq	1.46
98. TOTAL AREA	14,000.00 sq	14,000.00 sq	1.46
99. TOTAL AREA	14,000.00 sq	14,000.00 sq	1.46
100. TOTAL AREA	14,000.00 sq	14,000.00 sq	1.46



site plan & statistics



Shacca Caledon Holdings Inc. - 16114 Airport Road

Town File No.: 21T-17005C, RZ 17-08, POPA 17-02

Location: East: 16114 Airport Road ([Location Map](#))

Ward: 3

Lead Planner: [Mary Nordstrom](#), Senior Development Planner, 905-584-2272 ext.4223

Applications have been received by the Town of Caledon Development Approval and Planning Policy Department for a Draft Plan of Subdivision, Zoning By-law Amendment and Official Plan Amendment.

Description of Property

The subject lands are located in the northern portion of the Village of Caledon East, north of Walker Road West on the west side of Airport Road.

Purpose and Effect of the Applications

Draft Plan of Subdivision

The applicant is proposing to subdivide the site into a 1.16 ha (2.86 acre) residential block consisting of 38 condominium townhouse units, a 0.56 ha (1.38 acre) retail commercial block consisting of 1,373 m2 (14,800 ft2) of Gross Floor Area including conversion of the Allison's Grove residence to accommodate commercial uses and a 2.27 ha (5.6 acre) environmental block to protect the wetland and woodland feature and associated buffers. One access to Airport Road is proposed for the residential condominium and two accesses are proposed for the commercial block; one from Airport Road and one from Walker Road West.

Please visit the following link to view the Draft Plan of Subdivision - [Draft Plan of Subdivision](#) (pdf)

Zoning By-law Amendment

The purpose of the Zoning By-law Amendment is to rezone the lands from Rural (A2) Zone and Environmental Policy Area 1-Oak Ridges Moraine (EPA 1-ORM) Zone to Residential Townhouse Exception -XX (RT-XX) Zone, Village Commercial Exception -XX (CV-XX) Zone and Environmental Policy Area 1-Oak Ridges Moraine (EPA 1-ORM) Zone.

Please visit the following link to view the Draft Zoning By-law Amendment - [Draft Zoning By-law Amendment](#) (pdf)

Official Plan Amendment

The purpose of the proposed site specific Official Plan Amendment is to expand the existing permitted uses in the Special Use Area A designation to permit townhouse dwellings and village commercial uses.

Please visit the following link to view the Draft Official Plan Amendment - [Draft Official Plan Amendment](#) (pdf)

Status

In circulation

Notices

[Notice of Application](#)

Material Submitted in Support of the Application

[Cover Letter](#), dated July 2017 (pdf)

[Planning Justification Report](#), prepared by GSAI, dated July 2017 (pdf)

[Draft Zoning By-law Amendment](#), (pdf)

- [Draft Plan of Subdivision](#), prepared by GSAI, dated February 2017 (pdf)
- [Draft Official Plan Amendment](#), (pdf)
- [Traffic Impact Study](#), prepared by C.F. Crozier & Associates Inc., dated March 2017 (pdf)
- [Development Concept Plan](#), prepared by GSAI, dated February 2017 (pdf)
- [Functional Servicing Report](#), prepared by Trafalgar Engineering Ltd., dated March 2017 (pdf)
- [Environmental Impact Study](#), prepared by Dillon Consulting, dated April 2017 (pdf)
- [Environmental Setbacks](#), prepared by Dillon Consulting, dated January 2017 pdf)
- [Urban Design Report](#), prepared by FBP Architects, dated March 2017 (pdf)
- [Noise Study](#), prepared by HGC Engineering, dated April 2017 (pdf)
- [Landscape Concept Plan](#), prepared by SBK Landscape Architecture, dated February 2017 (pdf)

For studies that are not available on line, the public may view (by appointment) the documents at Town Hall, in the Development Approvals and Planning Policy Department.

Contact

For further information please contact [Mary Nordstrom](#), Senior Development Planner, 905-584-2272 x. 4223.

Resources

View the Town's current [Official Plan](#) and [Zoning By-law 2006-50, as amended](#).

Sign up for our eNewsletter

Email:

© The Corporation of the Town of Caledon | 6311 Old Church Road, Caledon Ontario L7C 1J6 | 905.584.2272 | 1.888.225.3366

KER ROAD WEST

ND /
FER

LIMIT OF DEV

TYPE 'A'
AMENITY
AREA
ACCESSIBLE
SPACE

EXISTING DETACHED
RESIDENTIAL

31.3

9.6 6.1 6.1 6.1 9.0

32.0

33.2

9.0 6.1 6.1 6.1 6.1

7.6

43.9

28.3

11.8

7.0m CONDO ROAD (ALLISON'S GROVE)

1.5m SIDEWALK

DELIVERY SPACE

2.5m WALKWAY

BUILDING 'B'
RETAIL COMMERCIAL
(ONE STOREY)
±905m² (9,741ft²)
47.8

9.6

10.9

55.9

18

14.5

17.0

31

2.5m WALKWAY

7.9

7.6

16.7

18.9

11.0

9.1

EX PORCH

11

8

6

28.3

6.1 6.1 6.1 6.1 6.1 6.1 6.1 10.8

10.1

3.0m ROAD WIDENING

DAYLIGHT TRIANGLE
15m x 15m

WALKER ROAD
EAST

EXISTING DETACHED
RESIDENTIAL

BUILDING 'A'
EXISTING HERITAGE HOUSE
(2 STOREYS)
(TO BE CONVERTED
TO RETAIL)
470m² (5,059ft²)

8m ALLISON'S GROVE BUFFER

EXISTING DETACHED
RESIDENTIAL

AIRPORT

TABLES

TABLE 1**PEEL R.M. - HISTORICAL POPULATION**

<u>Population</u>	<u>1991</u> census	<u>1996</u> census	<u>2001</u> census	<u>2006</u> census	<u>2011</u> census	<u>2016</u> census
Brampton C	234,445	268,251	325,428	433,806	523,906	593,638
Caledon T	34,965	39,893	50,605	57,050	59,460	66,502
Mississauga C	<u>463,388</u>	<u>544,382</u>	<u>612,925</u>	<u>668,599</u>	<u>713,443</u>	<u>721,599</u>
Total Peel R.M.	732,798	852,526	988,958	1,159,455	1,296,809	1,381,739
<u>Average Annual Change - amt</u>		<u>1991-1996</u>	<u>1996-2001</u>	<u>2001-2006</u>	<u>2006-2011</u>	<u>2011-2016</u>
Brampton C		6,761	11,435	21,676	18,020	13,946
Caledon T		986	2,142	1,289	482	1,408
Mississauga C		<u>16,199</u>	<u>13,709</u>	<u>11,135</u>	<u>8,969</u>	<u>1,631</u>
Total Peel R.M.		23,946	27,286	34,099	27,471	16,986
<u>Average Annual Change - %</u>		<u>1991-1996</u>	<u>1996-2001</u>	<u>2001-2006</u>	<u>2006-2011</u>	<u>2011-2016</u>
Brampton C		2.7%	3.9%	5.7%	3.8%	2.5%
Caledon T		2.6%	4.7%	2.4%	0.8%	2.2%
Mississauga C		3.2%	2.4%	1.7%	1.3%	0.2%
Total Peel R.M.		3.0%	3.0%	3.2%	2.2%	1.3%

Source: Statistics Canada

Note: Population unadjusted for census undercount

TABLE 2

TOWN OF CALEDON - OFFICIAL PLAN POPULATION ALLOCATIONS

<u>Population</u>	<u>2011</u> allocation	<u>2021</u> allocation	<u>2031</u> allocation
Rural Service Centres:			
South Albion - Bolton	28,199	28,848	38,889
Caledon East	5,225	8,654	8,654
Mayfield West	12,300	17,515	27,584
Subtotal: Rural Service Centres	45,724	55,017	75,127
Villages	6,592	8,242	10,753
Hamlets	1,452	1,666	1,662
Industrial/Commercial Centres	178	175	175
Paigrave Estate Residential Community	3,909	4,636	5,756
Rural	<u>17,145</u>	<u>17,264</u>	<u>17,527</u>
Total: Town of Caledon	75,000	87,000	111,000
Average Annual Change - amt			
		<u>2011-2021</u> 10 yr period	<u>2021-2031</u> 10 yr period
Rural Service Centres:			
South Albion - Bolton		65	1,004
Caledon East		343	0
Mayfield West		<u>522</u>	<u>1,007</u>
Subtotal: Rural Service Centres		929	2,011
Villages		165	251
Hamlets		21	0
Industrial/Commercial Centres		0	0
Paigrave Estate Residential Community		73	112
Rural		<u>12</u>	<u>26</u>
Total: Town of Caledon		1,200	2,400
Average Annual Change - %			
		<u>2011-2021</u> 10 yr period	<u>2011-2021</u> 10 yr period
Rural Service Centres:			
South Albion - Bolton		0.2%	3.0%
Caledon East		4.9%	0.0%
Mayfield West		3.5%	4.5%
Subtotal: Rural Service Centres		1.8%	3.1%
Villages		2.2%	2.6%
Hamlets		1.4%	0.0%
Industrial/Commercial Centres		-0.2%	0.0%
Paigrave Estate Residential Community		1.7%	2.2%
Rural		0.1%	0.2%
Total: Town of Caledon		1.5%	2.4%

Source: Town of Caledon Official Plan Amendment No. 226 & Planning and Development Department

Note: Population figures include the 2001 Census undercount of 4.2%

TABLE 3

CALEDON EAST CORE COMMERCIAL - MERCHANDISE MIX

By Address	Business	Employees	NAICS Code	NAICS Grouping
	May 2008 Inventory			
15958 Airport Road	Federated Automotive Parts	5	4413	Automotive Parts, Accessories and Tire Stores
16078 Airport Road	Bell's Framing & Fine Art	4	4422	Home Furnishings Stores
16018 Airport Road	Berney's Pro Hardware	3	4441	Building Material and Supplies Dealers
15771 Airport Road	Foodland	34	4451	Grocery Stores
15977 Airport Road	OK Plaza Variety Store	2	4451	Grocery Stores
15980 Airport Road	Marvellous Munchies	6	4451	Grocery Stores
15977 Airport Road	Caledon East Home Bakery	4	4452	Specialty Food Stores
15980 Airport Road	Howard The Butcher, and Deli	3	4452	Specialty Food Stores
15771 Airport Road	Caledon East Guardian Drugs	12	4461	Health and Personal Care Stores
15955 Airport Road	Gunter Pharmasave	4	4461	Health and Personal Care Stores
15955 Airport Road	Craft House	3	4511	Sporting Goods, Hobby and Musical
15955 Airport Road	The Craft House	2	4511	Sporting Goods, Hobby and Musical
15943 Airport Road	Sears Catalogue Sales	1	4529	Other General Merchandise Stores
15943 Airport Road	Hummingbird Flowers & Gifts	1	4531	Florists
15980 Airport Road	Petrific Pet Foods	3	4539	Other Miscellaneous Store Retailers
15968 Airport Road	CIBC	10	5221	Depository Credit Intermediation
15771 Airport Road	Caledon East Audio Video	7	5322	Consumer Goods Rental
15980 Airport Road	Caledon East Veterinary	3	5419	Other Professional, Scientific & Technical
15771 Airport Road	Dental Office		6212	Health Care Services
15771 Airport Road	Caledon East Chiropractic	3	6213	Offices of Other Health Practitioners
15954 Airport Road	The Town Fryer Fish & Chips	5	7221	Full-Service Restaurant
16023 Airport Road	Gourmandissimo Fine Foods	7	7221	Full-Service Restaurant
16033 Airport Road	Tom's Family Restaurant		7221	Full-Service Restaurant
15935 Airport Road	Trailside Bistro & Café	6	7222	Limited-Service Eating Places
15980 Airport Road	Subway Sandwiches	6	7222	Limited-Service Eating Places
16057 Airport Road	Einhome Catering & Fine Food	6	7223	Special Food Services
15819 Airport Road	Frank's Men's Hair Styling	1	8121	Personal Care Services
16035 Airport Road	Aroma Touch Esthetics	4	8121	Personal Care Services
16035 Airport Road	Carusi Hair Salon	4	8121	Personal Care Services
15771 Airport Road	Dryclean World	3	8123	Dry Cleaning and Laundry Services
15943 Airport Road	Hummingbird Dry Cleaners	1	8123	Dry Cleaning and Laundry Services
15964 Airport Road	Dogs By Bryson	3	8129	Other Personal Services
16009 Airport Road	Digica Computers		44312	Computer Hardware & Software
16011 Airport Road	Dennis Antiques		45331	Used Furniture/Antiques

Address:	May 2008 Inventory	October 2017 Inventory
16078 Airport Road	Bell's Framing & Fine Art	Inspiration Framing & Fine Art
16057 Airport Road	Einhome Catering & Fine Food	Fitness Studio
16048 Airport Road		Nails & Spa
16035 Airport Road		Bloom Fashion Boutique
16035 Airport Road	Aroma Touch Esthetics	Aroma Touch Esthetics
16035 Airport Road	Carusi Hair Salon	Carusi Hair Salon
16033 Airport Road	Tom's Family Restaurant	Tom's Family Restaurant
16023 Airport Road	Gourmandissimo Fine Foods	Gourmandissimo Fine Foods
16018 Airport Road	Berney's Pro Hardware	Demolished
16011 Airport Road	Dennis Antiques	Caledon Medical
16009 Airport Road	Digica Computers	Caledon East Veterinary
16000 Airport Road		LCBO
15995 Airport Road		Log Home Dental
15980 Airport Road	Marvellous Munchies	Caledon Hills Coffee Shop
15980 Airport Road	Howard The Butcher, and Deli	Howard The Butcher, and Deli
15980 Airport Road	Petrific Pet Foods	Petrific Pet Foods
15980 Airport Road	Caledon East Veterinary	Cindi's Unique Gifts
15980 Airport Road	Subway Sandwiches	Subway Sandwiches
15977 Airport Road	OK Plaza Variety Store	OK Plaza Variety Store
15977 Airport Road	Caledon East Home Bakery	Gabes Country Bakery
15968 Airport Road	CIBC	CIBC
15964 Airport Road	Dogs By Bryson	Vacant
15958 Airport Road	Federated Automotive Parts	Express Automotive
15955 Airport Road	Gunter Pharmasave	Pharmasave
15955 Airport Road	The Craft House	Caledon Optometry
15954 Airport Road	The Town Fryer Fish & Chips	Pizza Express
15943 Airport Road	Sears Catalogue Sales	Vacant
15943 Airport Road	Hummingbird Flowers & Gifts	Bow Wow Pets
15943 Airport Road	Hummingbird Dry Cleaners	Vacant
15935 Airport Road	Trailside Bistro & Café	Four Corners Bakery & Eatery
15819 Airport Road	Frank's Men's Hair Styling	Frank's Men's Hair Styling
15771 Airport Road	Foodland	Foodland
15771 Airport Road	Caledon East Guardian Drugs	Caledon East Guardian Drugs
15771 Airport Road	Dental Office	Dental Office
15771 Airport Road	Caledon East Chiropractic	Caledon East Chiropractic
15771 Airport Road	Dryclean World	Dryclean World
	Caledon East Audio Video	Caledon East Audio Video

Source: Economic Development & Communications Department - Town of Caledon

Joseph Urban Consultants field review - May 2008

Joseph Urban Consultants field review - October 2017

TABLE 4

RETAIL & SERVICE COMMERCIAL INVENTORY - BOLTON COMMUNITY

<u>Store Type</u>	<u>(1) Total Floorspace (population)</u>	<u>2006 SF/Capita 26,478</u>	<u>(2) Total Floorspace (population)</u>	<u>2014 SF/Capita 26,670</u>
FSRM:				
Supermarket	76,507	2.89	69,200	2.59
Specialty Food	<u>21,033</u>	<u>0.79</u>	<u>35,400</u>	<u>1.33</u>
Subtotal	97,540	3.68	104,600	3.92
GAFO + Pharmacy:				
Pharmacies & Personal Care Stores	22,788	0.86	50,200	1.88
Department Stores	0	0.00	109,600	4.11
Other General Merchandise Stores	46,075	1.74	37,200	1.39
Apparel & Accessories Stores	20,486	0.77	80,300	3.01
Furniture, Furnishings & All Electronic Stores	8,550	0.32	41,900	1.57
Other Retail	<u>37,473</u>	<u>1.42</u>	<u>107,100</u>	<u>4.02</u>
Subtotal	135,372	5.11	426,300	15.98
Building & Outdoor Home Supply Stores:	9,580	0.36	175,200	6.57
Beverage Stores Liquor/Beer Wine:	3,600	0.14	13,500	0.51
Services:				
Food Services (Restaurants)	84,452	2.43	144,000	5.40
Personal Services	55,512	2.10	55,514	2.08
Financial Institution	<u>22,701</u>	<u>0.86</u>	<u>41,900</u>	<u>1.57</u>
Subtotal	142,665	5.39	241,414	9.05
Health Care (Doctors, Dentists)	90,551	3.42	95,600	3.58
Other Office (excl. govt)	7,600	0.29	31,600	1.18
Total Services	240,816	9.09	368,614	13.82
Vacant Space:	75,371	2.85	138,900	5.13
Total Floorspace (sf)	562,279	21.24	1,225,114	45.94
Vacancy Rate	13.4%		11.2%	

Source:

(1) W. Scott Morgan, Retail Commercial Demand Study, South Albion-Bolton Community Plan, September 8, 2006

(2) Kircher Research Associates Ltd, Bolton Market Study, May 2014

FSRM = Food Store Related Merchandise

NFSRM = Non-Food Store Related Merchandise

TABLE 5

FUTURE FLOORSACE POTENTIAL - CALEDON EAST 2016 to 2031

<u>Store Type/Period:</u>		<u>2021</u>	<u>2026</u>	<u>2031</u>
Base Year Population:	2016	6,940	6,940	6,940
Population Allocation:	2021	8,654		
(OPA 226)	2026		8,654	
	2031			8,654
Population Increase Over Base Year		1,715	1,715	1,715

<u>Category</u>	<u>SF/Capita</u>	<u>Net Incremental Floorspace:</u>		
Supermarket	2.89	4,954	4,954	4,954
Specialty Food	0.79	1,362	1,362	1,362
Pharmacies & Personal Care Stores	0.86	1,476	1,476	1,476
Department Stores (1)	0.00	0	0	0
Other General Merchandise Stores	1.74	2,983	2,983	2,983
Apparel & Accessories Stores	0.77	1,327	1,327	1,327
Furniture, Furnishings & Electronics	0.32	554	554	554
Other Retail	1.42	2,426	2,426	2,426
Building & Outdoor Home Supply	0.36	620	620	620
Beverage Stores Liquor/Beer Wine	0.14	233	233	233
Food Services (Restaurants)	2.43	4,173	4,173	4,173
Personal Services	2.10	3,595	3,595	3,595
Financial Institution	0.86	1,470	1,470	1,470
Health Care (Doctors, Dentists)	3.42	5,863	5,863	5,863
Other Office (excl. govt)	0.29	492	492	492
Total	18.39	31,528	31,528	31,528

<u>Selected Categories:</u>				
<u>FSR:</u>				
Specialty Food	0.79	1,362	1,362	1,362
Subtotal FSR		1,362	1,362	1,362
<u>NFSR:</u>				
Pharmacies & Personal Care Stores	0.86	1,476	1,476	1,476
Other General Merchandise Stores	1.74	2,983	2,983	2,983
Apparel & Accessories Stores	0.77	1,327	1,327	1,327
Furniture, Furnishings & Electronics	0.32	554	554	554
Other Retail	1.42	2,426	2,426	2,426
Subtotal NFSR	5.11	8,766	8,766	8,766
<u>Non-Retail:</u>				
Food Services (Restaurants)	2.43	4,173	4,173	4,173
Personal Services	2.10	3,595	3,595	3,595
Health Care (Doctors, Dentists)	3.42	5,863	5,863	5,863
Subtotal Non-Retail	4.53	13,631	13,631	13,631
Total Floorspace Potential		23,759	23,759	23,759
Proposed Mixed-Use Retail		9,550	9,550	9,550
Share of incremental supportable space (no impact)		40%	40%	40%

TABLE 6

MID-RISE DEVELOPMENT CONCEPT

<u>Built form</u> sf	<u>1B</u> 625 sf	<u>1B+D</u> 696 sf	<u>2B</u> 876 sf	<u>2B+D</u> 996 sf	Subtotal
Residential:					
5th	1	13	2	3	19
4th	3	12	4	2	21
3rd	3	12	4	2	21
2nd	3	12	4	2	21
Grnd	<u>1</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>4</u>
Total	11	50	15	10	86
Retail:					
specialty food	1,250				
pharmacy	1,050				
other general merch.	750				
apparel & Accessories	500				
home furnishings	750				
restaurant	2500				
personal service	1500				
other service	<u>1250</u>				
Total Retail	9,550				

Notes:

Notes: Residential - Upper: Ground floor commercial with upper floor residential units

<u>Town of Caledon</u>	<u>2011</u>	<u>2016</u>
Total Population	59,460	66,502
Private dwellings	19,649	22,021
Persons Per Dwelling	3.03	3.02
Source: Statistics Canada Census		

Curriculum Vitae: Henry Joseph

Henry Joseph, president of **Joseph Urban Consultants**, has undertaken and completed numerous studies dealing with the planning, market opportunity and economic impact of commercial projects and tenants in all forms of commercial development and downtown areas over a thirty-five year period. He has provided detailed analysis of tenant performance and commercial area performance and structure to municipal committees, government agencies and the Ontario Municipal Board. He has both carried out and been responsible for associate consultants in the undertaking of planning, market and feasibility studies for virtually every type of real estate development in his career.

Academic & Professional Qualifications

- **B.Eng.** (civil engineering), McGill University
- **M.B.A.** (marketing & finance), Ivy Graduate Business School, University of Western Ontario

Retired From:

- **Canadian Institute of Planners (CIP)**
- **Ontario Professional Planners Institute (OPPI)**
- **Professional Engineers Ontario (PEO)**
- **Ontario Land Economists Association (OLEA)**
- **Lambda Alpha International** (an honorary land economics society)

Former & Current Positions

- **H.G. Acres & Company Limited** – Design Engineer for civil engineering projects
- **Technical Economists Limited** – Senior project consultant
- **Cadillac Development Corporation** – Assistant to the President & Director, corporate development
- **Geoffrey Still & Associates** – Director, research & planning services
- **A.E. Le Page Limited** – National Vice-President, principal consultant, research & planning services
- **Joseph Urban Consultants** – President, principal consultant, expert witness