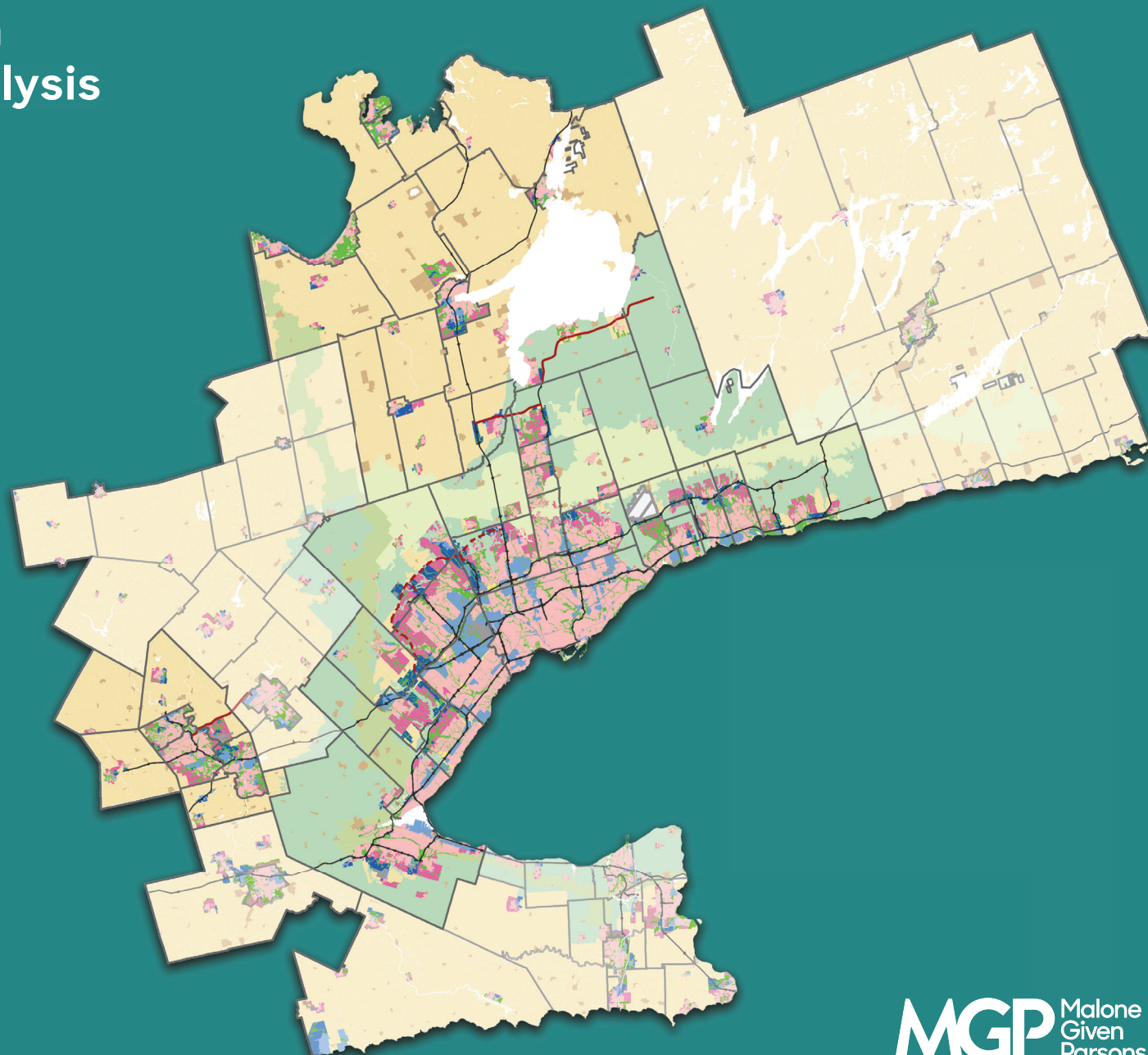


Greater Toronto & Hamilton Area, Simcoe County, Barrie, Orillia & Waterloo Region Land Supply Analysis



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Key Report Findings

The *Greater Toronto and Hamilton Area* (“*GTHA*”) is currently experiencing a significant shortfall in housing supply to meet the forecasted needs of *A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2020* (“*2020 Growth Plan*”). There are significant challenges to ensure that housing supply can be realized in the short-term and that a sufficient supply of land is made available for housing and employment in the long-term. This report provides an analysis of current land supply within the *GTHA*, Simcoe County, the Cities of Barrie and Orillia, and Waterloo Region (the “*Study Area*”) with the following key findings:

- Between 2006-2021, the *GTHA* was short 77,900 housing units (18,500 *Grade-Related Housing* units and 59,400 *High-Density* apartments).
- All municipalities in the *GTHA* fell short of their projected *High-Density* apartment growth forecast from 2006-2021.
- This shortfall will increase to an estimated 97,000 *Grade-Related Housing* units (4,800 ha of land) plus any shortfall of *High-Density* apartment growth by the year 2051 based on the Provincially approved 2022/2023 Official Plans.
- The reduction of land supply by the 2023 Provincial ‘resetting’ of Official Plan approvals could increase this housing shortfall to 206,800 *Grade-Related Housing* units (10,400 ha of land) plus any shortfall in apartment growth.
- The *GTHA* accommodates over 30% of Canada’s immigration each year. Because immigration is the primary driver of population growth in Canada, a shortfall of housing in the *GTHA* has national implications.
- The ‘*Yellowbelt*’ (existing *Low-Density* neighbourhoods) comprises approximately 102,000 hectares or 70% of the *Community Areas* in existing *Built-up Areas* (“*BUAs*”). Based on the municipally adopted Official Plans, as proposed to be ‘reset’ through the Province’s announcement on October 23, 2023 to include as little as no additional land for new *Settlement Area Boundary Expansion Areas*, the shortfall in *Grade-Related Housing* units would require 10% (approximately 10,400 ha of land) of all existing *Low-Density* neighbourhoods to be redeveloped to accommodate growth to the year 2051.
- The Provincially approved Official Plans do not perpetuate *Sprawl*. *Sprawl* occurs when the rate of growth in the land base is greater than the rate of population growth. The *GTHA* will accommodate 24% population growth compared to a 7% increase in housing land area.
- Only the Cities of Hamilton and Toronto met and surpassed forecasted growth targets for *Grade-Related Housing*, demonstrating the ability to deliver this type of housing in older neighbourhoods versus the limited potential in newly built neighbourhoods in the other municipalities in the *GTHA*.
- Many municipalities are choosing to limit *Settlement Area Boundary Expansion Areas* by assuming a housing growth mix of approximately 40% *Grade-Related Housing* and 60% *High-Density* apartments, which contradicts the forecasted market-based demand of approximately 60% *Grade-Related Housing* and 40% *High-Density* apartments. This results in the restriction of the market’s housing choice by relying more heavily on *High-Density* apartments in the 2021-2051 timeframe.
- In reviewing the existing *Vacant Land* for new housing and employment in the *Study Area*, the lack of available infrastructure and the complex, lengthy, and changing planning process are the primary factors delaying the realization of new housing and jobs.

Key Report Recommendations

Following these findings, the report provides the following key recommendations to resolve land supply issues in the *Study Area*:

1. Sufficient land must be made available for a market-based supply of housing to meet forecasted growth needs to the planning horizon of 2051.
2. The potential for '*Missing-Middle Housing*' intensification must be unlocked in existing *BUAs*, particularly in the *Low-Density* existing neighbourhoods (commonly referred to as the '*Yellowbelt*').
3. Funding/financing for the infrastructure required to develop housing in the existing *Designated Greenfield Area* ("*DGA*") is urgently needed to realize housing targets over the next 10 year period.
4. A modern and stable planning system is required to realize the forecasted growth in the *Greater Golden Horseshoe* ("*GGH*").

Introduction

Malone Given Parsons Ltd. (“MGP”) has provided planning, economic, and development management expertise to the public and private sectors since 1978. MGP is one of the largest planning consulting firms in Canada offering partner-level specialized expertise in urban and regional planning, master planning, development approvals, economic development, growth management strategies, and land economics.

As a firm, MGP has been involved as lead planners for new *GTHA Community Areas* that now house over half a million people. MGP is actively engaged in leading planning efforts through the region’s new *Community Areas*. This front-line, hands-on experience gives MGP valuable insights into both policy creation and policy implementation.

Over the years, MGP has also developed a comprehensive Geographic Information Systems (“GIS”) database, compiling all Official Plan/Secondary Plan land use designations including the *DGA* development status throughout the *GTHA* and portions of the *GGH Outer Ring*. This database enables the quantification and comprehensive analysis of land uses in the context of the policies of the 2020 Growth Plan.

The combination of experience and data provides a unique platform from which MGP can offer informed comments on the implications of the 2020 Growth Plan on land supply.

This Land Supply Analysis provides a measurement of the *DGA* land supply in the *Study Area* as of Spring 2023 and summarizes relevant 2021 Census data. Additional mapping is provided relating to land use designations, population, and employment densities, and remaining *Whitebelt* land. It also compares Growth Plan growth forecasts with the 2021 Census and municipally adopted forecasts to compare how forecasted demand will be met with the existing and future land supply.

This Land Supply Analysis is based on the Official Plans that were Provincially approved in November 2022 and April 2023.

For comparative purposes, it also examines the impacts of ‘resetting’ the Official Plans to what was originally adopted by municipalities, as is proposed through Bill 150, Planning Statute Law Amendment Act, 2023. ‘Resetting’ of the Official Plans would result in a significant reduction in the amount of land added to the *Settlement Areas*, particularly in the Regions of Halton and Waterloo and the City of Hamilton.

Purpose and Methodology

Purpose of this Analysis

Since 2001, MGP has prepared and continuously maintains detailed land use mapping as part of their Planned Urban Structure - Greater Golden Horseshoe Map. Over the past 22 years, we have continually updated and accumulated data within our GIS database, providing our firm with knowledge-based context in undertaking land use planning and land economics for large projects throughout the GGH, and serving as a powerful analytical tool in our day-to-day practice.

The analysis in this report leverages our mapping and planning insight to provide an accurate account of all DGA land supply in the Study Area. This is presented through mapping and land area statistics for each of the upper-tier, lower-tier, and single-tier municipalities in the above-noted areas, with the primary purpose of determining whether the 2051 population and employment forecasts of the 2020 Growth Plan will be achieved. References to forecasted housing need in this report refer to the background forecasts prepared by Hemson for the GGH in 2006, 2012 and 2020, for the Ministry of Municipal Affairs and Housing. This analysis also provides an overview of Official Plan land use designations and corresponding density to characterize the planning context and as a basis for discussion of key challenges to development in each region.

Methodology and Data Sources

The 2020 Growth Plan establishes a typology of land use designations that serve as a structure by which to control growth. DGAs are defined as “lands within settlement areas (not including rural settlements) but outside of 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 [the Growth Plan]” (2020 Growth Plan).

In order to create a current and accurate database, land in each municipality is categorized as either within the BUA or DGA in accordance with the criteria of the 2020 Growth Plan. Within the DGA, *Non-Developable Lands* (including natural heritage systems and features, major infrastructure, and cemeteries) are identified and removed from the calculations.

The remaining *Developable Area* within the DGA is classified as either *Community Area* or *Employment Area* in accordance with Provincial planning policies. In instances where land is under study and no determination has been made related to whether it is *Community Area* or *Employment Area*, lands are classified as *Uses to be Determined*. All *Community* and *Employment Areas* are then classified as *Committed* or *Vacant Lands*.

Committed Lands are those that are *Built*, *Under Construction (U/C)*, *Registered* or *Draft Approved*. They are determined through an examination of the most current available aerial photography and municipal data, including development application status mapping. The majority of these lands were first designated DGA as part of the 2006 Growth Plan and have already been developed. ‘*Built*’ includes land with completed housing, house foundations or more advanced construction in progress. Land with earthworks (cleared, road network and servicing) in progress is considered ‘*Under Construction (U/C)*’. The most current development application status data from each municipality was obtained by MGP and has been used to identify other *Committed Land* as either ‘*Registered*’ or ‘*Draft Approved*’.

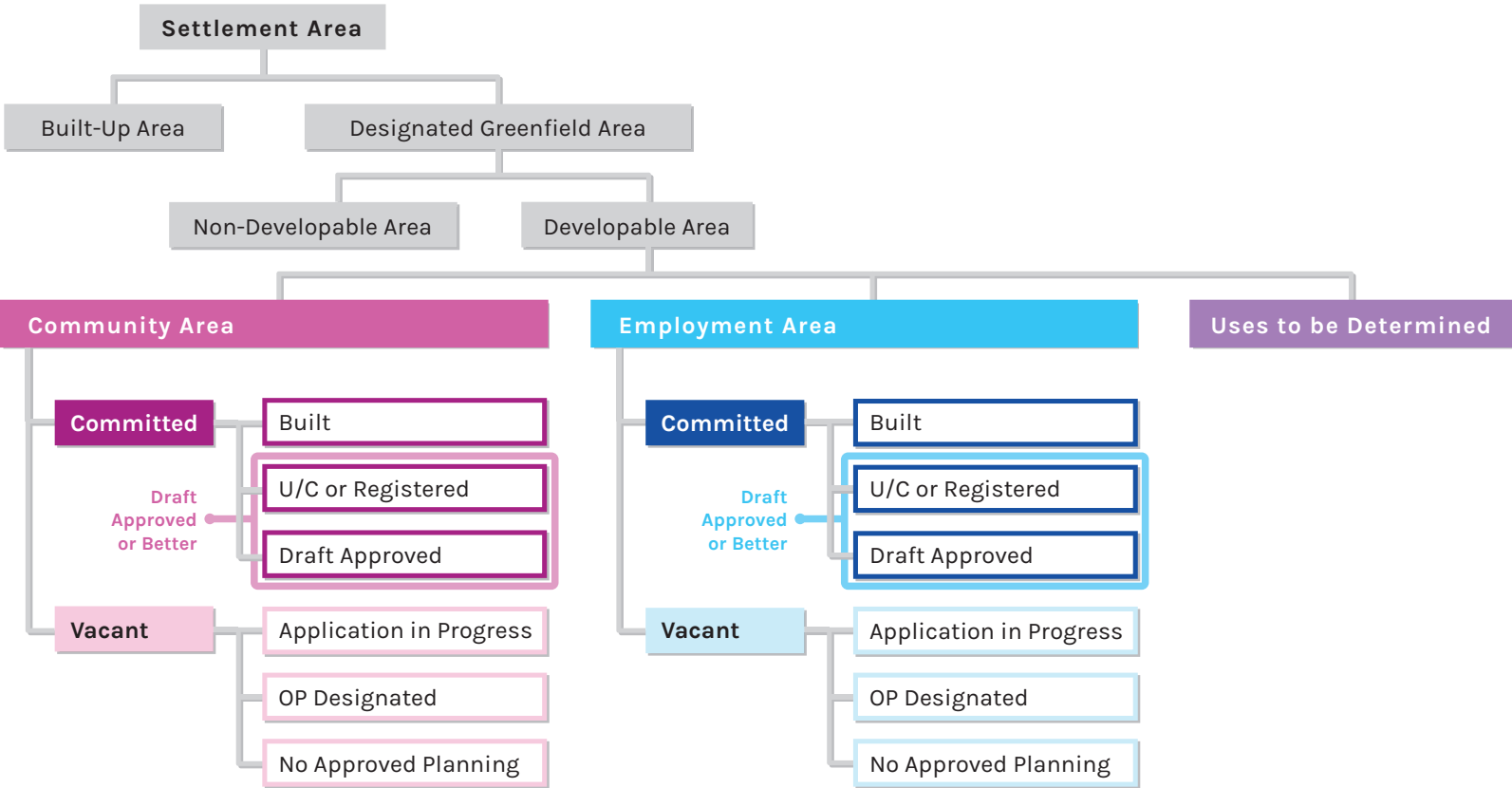
Vacant Lands are those that have a submitted development application awaiting approval, are designated in an Official Plan/Secondary Plan for urban land uses or have no approved planning as per the Official Plan as of the date of this report. The vacant *Community Area* represents the available land for development that can accommodate new DGA residential growth at the density required by the 2020 Growth Plan, as contrasted to *Employment Areas* which generally prohibit

residential uses and are planned to accommodate businesses. The intent of this report is to determine the achievability of the forecasted growth; however, population growth is the main factor affecting land supply and so while this report provides data on *Employment Area* land supply, the commentary in this report focuses primarily on *Community Area*.

The classification of *Vacant Land* is determined through a review of municipally provided development status reports and Official Plan/Secondary Plan schedules.

The Land Supply Methodology Chart summarizes the high-level methodology for categorizing land (See Figure 1). A more detailed methodology of the analysis is provided in the Appendix of this report.

Figure 1: Land Supply Methodology Chart



Note: lower-tier municipality land supply analyses combine lands that are categorized Under Construction/Registered and Draft Approved as Draft Approved or Better, representing lands that are far enough along in the approvals process not to be considered vacant.

Key Factors Affecting Growth in the DGA

Protection of Natural Heritage Systems

- There is a high level of protection for natural heritage features in Ontario created by Provincial policies, plans, regulations, and guidelines that are implemented into Official Plans and best planning practice documents. This environment-first approach to growth management has resulted in increased levels of technical study and scrutiny. Local municipalities and conservation authorities implement these policies and determine the extent of natural systems and features that must be protected from development. The resulting Natural Heritage Systems accounts for approximately 30% of gross land area being protected from development.

Transportation Capacity and Transit

- Major investments in transportation infrastructure have been made since the release of the first Growth Plan in 2006. However, much of the DGAs are not proximal to existing or planned higher-order transit or a sufficient road network. This has resulted, in some cases, in development being constrained due to the lack of overall sufficient transportation capacity in the surrounding network.

Infrastructure Availability and Costs

- Development further away from lake-based water and wastewater servicing facilities remains a challenge in much of the GTHA, where the lack of infrastructure availability for new growth areas is resulting in constraints to growth.

- Planning for new municipal infrastructure to support growth has been complicated by recent Provincial changes to the Development Charges Act, 1997, making it unclear when such municipal infrastructure will be available and uncertain how it will be funded.
- Ongoing and systemic issues regarding the provision of new infrastructure under the Ontario Energy Act are resulting in a Province-wide challenge in funding and delivering gas and electricity to new development sites in a timely manner.
- Throughout the GGH, the reality is that the forecasted employment and housing in the DGAs are completely dependent upon and cannot be realized until infrastructure is available, even in instances where all the requisite planning policy and development approvals are in place.
- Infrastructure availability has become the critical path item to delivering new housing and jobs.

The Changing Form of Communities and Land Needs Assessments

- The 2006 Growth Plan was a deliberate effort to reduce land consumption for future growth by prioritizing intensification of existing BUAs and requiring minimum transit- supportive densities for DGAs. Thirty years ago, the typical housing mix for new communities would have been overwhelmingly comprised of single- and semi-detached housing. Recently planned communities are more dense and planned to provide a greater range of housing choices with a mix of units resulting in higher levels of overall density in new secondary plan areas, many of which reflect 40% single- and semi-detached, 40% townhouses, and 20% apartments, which generally equates to a minimum of 60 residents and jobs per gross hectare and 20 units per gross hectare.

- The 2020 Growth Plan would result in higher density built forms such that 50% of new development by 2051 is required as intensification within existing BUAs, and development on new DGAs must achieve a minimum density of 50 people and jobs per hectare. The new plan provides an emphasis on achieving a market-based supply of housing. The Province, through Hemson Consulting Ltd. (“Hemson”), has prepared housing and population forecasts for the GGH to the year 2051. In the context of these forecasts, the 2020 Growth Plan requires upper- and single-tier municipalities to utilize the 2020 Land Needs Assessment Methodology (“LNAM”) to determine land needs to 2051 and follow its assumptions and other directions for accommodating forecasted growth. The LNAM requires the forecasting and determination of land need for housing by dwelling type. The dwelling types listed in the LNAM (pg. 10) are as follows:
 - Single/Semi-detached Houses;
 - Row Houses – including all forms of townhomes except for back-to-back;
 - Apartments, which may be subdivided into:
 - Low-rise Apartments - dwelling unit attached to other dwelling units including back-to-back townhouses, commercial units, or other non-residential space in a building that has less than five storeys
 - High-rise Apartments - dwelling unit in a building which has five or more storeys; and,
 - Other dwellings - All others.
- The 2020 Provincial Policy Statement (May 2020), 2020 Growth Plan, and LNAM build on the recommendations in the Minister of Municipal Affairs and Housing’s Housing Supply Action Plan.
- Conformity work with the 2020 Growth Plan using the LNAM requires that sufficient land be accommodated to the 2020 Growth Plan planning horizon of

2051. The LNAM provides guidance when determining the need for additional land:

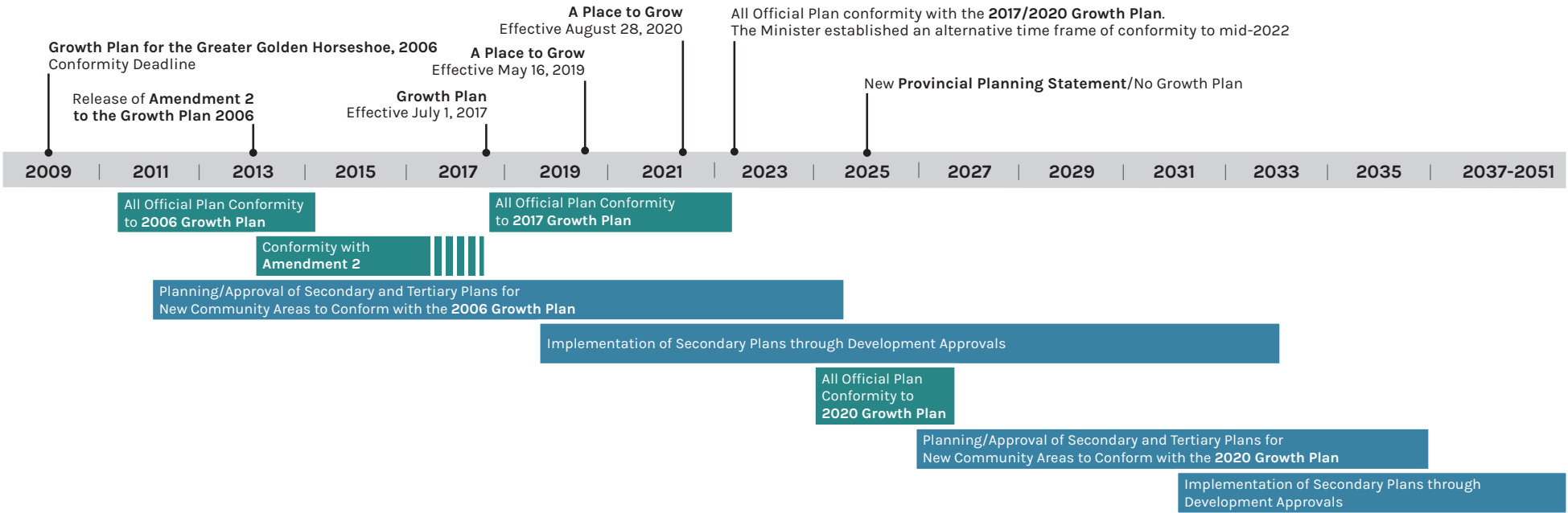
Conformity with the intensification and designated greenfield area density targets is confirmed or adjustments are made to ensure conformity with the Plan. This may require adjusting the mix of housing types while ensuring the provision of a market-based supply of housing to the extent possible. For the purposes of alternative intensification and designated greenfield area density targets, the ability to provide a market-based supply of housing is an important consideration in determining whether a target can be achieved. (2020 Land Needs Assessment Methodology, pg. 9)

- One of the themes consistent throughout these documents is a requirement for a market-based approach to housing (e.g. 2020 Provincial Policy Statement policies 1.1.1 b), 1.1.3.8 a), 1.4.1, and 1.4.3). This stands in contrast to preceding approaches to land needs assessment that intentionally limited the importance of market demand in assessing land needs to restrict the potential for new *Grade-Related Housing*, generally in favour of intensification in existing areas around transit infrastructure. Those previous, overly restrictive approaches are in large part responsible for an unduly constrained land supply and the consequent higher land prices.
- The current market-based approach continues to encourage intensification (particularly transit-supportive development) and compact built form while recognizing the need for *Grade-Related Housing* and ensuring sufficient land supply for housing that meets the projected needs of current and future residents.

Protracted Development Timelines

- The 2006 Growth Plan was to be implemented by 2009 to ensure that there was a sufficient supply of land to accommodate the 2031 population and employment forecasts. This has not happened. The development approval process in Ontario was complex and lengthy prior to the 2005 Planning Act and the 2006 Growth Plan changes requiring additional process. It now generally requires 8-10 years to complete the initial stages of policy and development planning prior to the first building permits being issued for *Vacant Land* in new communities. Beyond this initial timeframe, communities can take 15-20 years or longer to be fully built out as municipalities require time to process development applications and integrate growth with the delivery of hard and community infrastructure (e.g., sewer and water services, schools, parks, community centres).
- DGA development since 2006 has been limited to lands that were already within the *Settlement Area* prior to the Growth Plan. With the exception of portions of the Central Pickering Development Plan, the West Whitby Secondary Plan Area, and parts of North Markham, none of the post-2006 *Settlement Area Boundary Expansion Areas* have proceeded past policy planning to building permits, nor is it likely that the majority of these areas will be fully developed by 2031 due to the lengthy delay implementing the 2006 Growth Plan, increased complexity of local policy planning and development application approval processes, infrastructure constraints, and landownership priorities. This is a problem given that the calculations behind the 2006 Growth Plan required all DGAs to be fully developed by 2031 to accommodate the forecasted population and employment growth of the region.
- Figure 2 provides a high-level summary of the timeframes many municipalities are working under to realize growth in new *Community Areas*. The 2006 Growth Plan's original conformity deadline was in 2009. As of the writing of this report, new *Community Areas* have yet to complete the local policy planning process (e.g., secondary and tertiary policy planning documents) prior to development applications being able to commence in these areas.

Figure 2: Timeline for Growth Plan Implementation



Note: Each subsequent version of the Growth Plan, replaces the preceding version.

Primary Report Findings

Sufficient land must be made available for a market-based supply of housing to meet forecasted growth needs to 2051.

The land supply identified by the Province, through its approval of upper-tier and single-tier municipal Official Plans, is insufficient to accommodate the Provincially forecasted long-term population and employment growth of the 2020 Growth Plan. The *GTHA* is experiencing a housing shortage of 18,500 *Grade-Related Housing* units and 59,400 *High-Density* apartment units below the forecasted housing needs in 2021 (references to forecasted housing need refer to background forecasts prepared by Hemson for the *GGH* in 2006, 2012 and 2020 for the Ministry of Municipal Affairs and Housing). Without providing additional land and housing, the shortfall will only worsen towards the 2051 planning horizon.

Land needs must be determined based on demographic forecasts that are aligned with market-based demand expectations. The impact of determining land needs based on an aspirational housing mix that results from a planning-led, pre-determined housing-mix, rather than a market-based demand results in inaccurate land need assumptions that will in turn generate a shortfall of land required to provide a market-based supply of housing. This will also contribute to increased housing affordability challenges within the *Study Area*.

The Province, through Hemson, prepared background forecasts to support the preparation of the 2006 Growth Plan, the 2013 Amendment 2 to the Growth Plan and the 2020 Growth Plan. Hemson's previous forecasts (for the 2006 Growth Plan and 2013 Amendment 2 to the Growth Plan) generally reflected the population growth that occurred and the unit mix that was ultimately built within the *GTHA* in the first 15 years of the Growth Plan from 2006-2021. These forecasts were generally market-based, providing for some shift in housing preferences towards higher density forms of housing. While the housing mix was generally achieved, development in the *GTHA* has not achieved the quantum of housing that was required. This shortfall mainly occurred in the 905-municipalities (Regions

of Durham, York, Peel, and Halton, and City of Hamilton) (with a total shortfall of 93,800 units) and is comprised of 57,700 *Grade-Related Housing* units and 36,100 *High-Density* apartment units that were not built. Overall, the *GTHA* has a shortfall of approximately 77,900 units that were forecasted as required to accommodate growth in this timeframe (see Table 1).

Table 1: Comparison of Forecasted and Built Unit Growth within the *GTHA*, 2006-2021

GTHA Municipalities	Grade-Related Housing	High Density Apartment Units	Total Units
Region of Durham	(13,200)	(7,300)	(20,500)
Region of York	(20,400)	(3,700)	(24,100)
Region of Peel	(7,300)	(22,000)	(29,300)
Region of Halton	(17,200)	(600)	(17,800)
City of Hamilton	400	(2,500)	(2,100)
905-Municipalities Total	(57,700)	(36,100)	(93,800)
City of Toronto	39,200	(23,300)	15,900
GTHA Total	(18,500)	(59,400)	(77,900)

Notes:

1. Toronto was forecasted to have a decline in Grade-Related Housing (-21,200 units) but instead achieved a growth (18,000 units), yielding a relative increase in supply that is higher than its actual growth.
2. Compares the 2006 Hemson Forecasting vs 2006-2021 Census.
4. 905-Municipalities include the Regions of Durham, York, Peel, Halton, and the City of Hamilton.
5. Values rounded to nearest 100.
6. Totals may not add up due to rounding.

As part of the Province's November 2022 and April 2023 approvals of the City of Hamilton, Regions of York, Peel, and Halton Official Plans, 10,500 hectares of *Community Area* land would be added to the *Settlement Area* to accommodate housing to meet the forecasted growth needs in the *GTHA* to 2051, an increase of 5,500 hectares from the municipally adopted Official Plans (see Table 2). Similarly, 4,100 hectares of *Employment Land* would be added to the *Settlement Area*, an increase of 1,500 hectares (see Table 3).

Table 2: Comparison of Community Area Settlement Area Boundary Expansion Areas

GTHA Municipalities	Adopted Official Plan	Approved Official Plan	Additional Community Area
Region of Durham	2,500	TBD	TBD
Region of York	2,100	2,900	800
Region of Peel	2,900	3,800	900
Region of Halton	0	1,900	1,900
City of Hamilton	0	1,900	1,900
City of Toronto	N/A	N/A	N/A
GTHA Total	7,500	10,500	5,500

Notes:

1. Adopted Official Plan Community Area based on LNA scenario that supported the adopted Official Plan.
2. Approved Official Plan Community Area calculated by MGP.
3. Settlement Area Boundary Expansion in City of Toronto is not applicable as the City is fully built-out.
4. Measured in hectares.
5. Values rounded to nearest 100.
6. Totals may not add up due to rounding.

Table 3: Comparison of Employment Area Settlement Area Boundary Expansion Areas

GTHA Municipalities	Adopted Official Plan	Approved Official Plan	Additional Employment Area
Region of Durham	1,200	TBD	TBD
Region of York	1,100	1,000	(100)
Region of Peel	1,500	1,800	300
Region of Halton	0	1,300	1,300
City of Hamilton	0	10	10
City of Toronto	N/A	N/A	N/A
GTHA Total	3,800	4,100	1,500

Notes:

1. Adopted Official Plan Employment Area based on LNA scenario that supported the adopted Official Plan.
2. Approved Official Plan Employment Area calculated by MGP.
3. Settlement Area Boundary Expansion in City of Toronto is not applicable as the City is fully built-out.
4. Measured in hectares.
5. Values rounded to nearest 100.
6. Totals may not add up due to rounding.

The Provincial modifications to include additional land in the approved Official Plans for the City of Hamilton, and Regions of York, Peel, and Halton results in a shortfall of approximately 97,000 *Grade-Related Housing* units from 2021 to 2051, assuming a density of 20 units per gross hectare on the 5,500 hectares of *Community Area* added to the *Settlement Area*. This shortfall is a result of conformity with the 2020 Growth Plan's higher intensification targets which require a shift of housing away from market-based demand. This shift away from a market-based supply of housing would require an unprecedented number of families to house themselves in *High-Density* apartment units.

The growth management directives proposed by some municipalities and special interest groups have sought to limit *Settlement Area Boundary Expansions* (e.g. limiting land to provide new housing), by assuming unprecedented shifts in the proposed housing mix. This shift towards accommodating growth solely through intensification will result in a housing mix that is contrary to the market-based demand housing needs forecast prepared by Hemson and the Province as background to the 2020 Growth Plan. For example, the Region of Halton and City of Hamilton adopted Official Plans with no *Settlement Area Boundary Expansion Areas* (see Table 2 above).

The housing mix being planned by municipalities to the 2051 planning horizon, based on the land supply in adopted Official Plans, is a further divergence from the Province's market-based forecast, resulting in a larger shortfall of approximately 206,800 *Grade-Related Housing* units offset by a surplus of approximately 326,800 *High-Density* apartment units in the *GTHA* (see Table 4). This would result in an increasing shortfall of the housing types required to accommodate the population growth over the 2021-2051 period.

Table 4: Deviation from Provincially Forecasted Unit Growth based on Official Plan Adopted within the GTHA, 2021-2051

GTHA Municipalities	Grade-Related Units	High Density Apartment Units	Total Units
Region of Durham	(23,100)	18,100	(5,000)
Region of York	(36,600)	41,400	4,800
Region of Peel	(59,000)	62,200	3,200
Region of Halton	(46,000)	47,400	1,400
City of Hamilton	(62,100)	62,100	0
905-Municipalities Total	(226,800)	231,200	4,400
City of Toronto	20,000	95,600	115,600
GTHA Total	(206,800)	326,800	120,000

Notes:

1. Forecasted unit growth based on LNAs that were used as basis for adopted Official Plans.
2. City of Toronto unit forecast assumed to be adopted based on Land Needs Assessment.
3. Values rounded to the nearest 100.
4. Totals may not add up due to rounding.

The overall shortfall of *Grade-Related Housing* units to meet the forecasted needs for the next 30 years, will compound the existing housing shortfall of 18,500 *Grade-Related Housing* units within the *GTHA* to create a prolonged housing shortage. When planning for forecasted growth, the Province's LNA and policies must be followed. Planning based on aspirational, non-market-based targets is effectively a planning experiment that will result in insufficient land supply, unrealistic housing choices, and threatens housing affordability and the attractiveness of the *GTHA* as a location for growth and investment. Good planning requires that sufficient land is made available for a market-based supply of housing to meet forecasted growth needs to the 2051 planning horizon.

There is an immediate need for a market-based long-term supply of land.

It is important to increase the quantum of DGA lands for long-term growth at this time, given the lengthy policy planning and development approvals processes in Ontario. It generally requires 8-10 years to complete the policy planning process

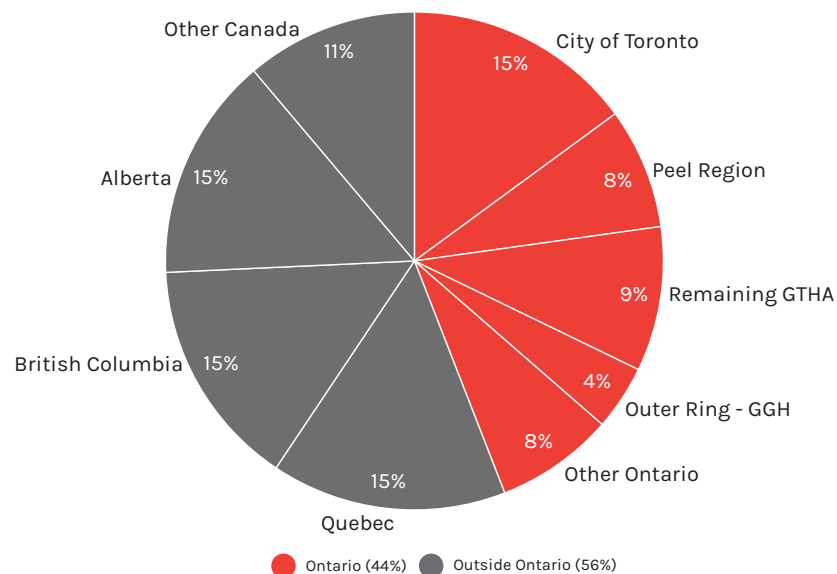
before proceeding to the development approvals process. Beyond this initial policy planning timeframe, communities can take 15-20 years or longer to be fully built as construction proceeds in stages and municipalities have limited capacity to process development applications and integrate growth with the delivery of hard and community infrastructure (e.g., sewer and water services, schools, parks, community centres). The shortfall of land today exacerbates the shortfall of a market-based long-term supply of land and housing in the future, resulting in a continued housing crisis for the next 10-25 years. While the modifications made by the Province in its November 2022 and April 2023 approvals of Official Plans reduced the housing shortage resulting from the land supply originally adopted by municipalities, the Provincially approved land supply is still insufficient to accommodate market-based demand for long-term growth.

→ Immigration is important to the economy and the GTHA must remain attractive for new immigrants.

Growth forecasts in many developed western countries are forecasted to decline over the next 30 years, where western countries will have an ageing population with increasing gaps in working age segments of the population. Immigration is therefore essential to sustain the economy. The *GTHA*, like much of the western world, will seek to attract highly qualified and skilled immigrants to fill demographic gaps in the labour force.

According to Statistics Canada, the *GTHA* typically accommodates over 30% of the national immigration each year and is a primary driver of population growth in Canada (See Figure 3). The Federal government has forecasted increases in immigration levels commencing in 2023, which will result in an urgent need for more housing over the next 10 years to address and accommodate this anticipated growth surge.

Figure 3: Proportion of National Immigration, 2021



A lack of housing, particularly appropriate housing for families, in both the short- and long-term will exacerbate the housing shortage and undermine the competitiveness of the GGH and GTHA as a place to attract young families, and by extension businesses who require appropriate, accessible, and affordable housing with access to transit for their employees. There is an urgent need to construct this necessary housing in the GTHA in the next 10 years for immigrants and other working age sectors of the population.

→ **Residential dwelling types are not interchangeable, particularly for families.**

It is not economically viable to transfer housing demand for families from *Grade-Related Housing* to *High-Density* apartment units. As per the latest Altus New Homes Market Report (September 2023) (the “Altus Report”), the cost per square

foot for condominium apartment units in the GTHA is \$1,345/square foot (average unit size sold that month was 773 square foot apartment). For a family-sized 1,000 square foot apartment, this would result in a purchase cost of approximately \$1,345,000 and an ongoing maintenance fee of \$1,000/month (assuming a maintenance fee of approximately \$1/square foot) – this is not affordable to most households. Given the costs associated with higher-density apartments, many *High-Density* apartment units must be smaller (on average no larger than 700 square feet) to achieve attainable housing prices. By contrast, *Grade-Related Housing* can provide for much larger living spaces at a lower construction cost. According to the Altus Report, the average price for single-family units is \$1,566,887. Assuming an average home size of 2,000 square feet, the price per square foot would be approximately \$783, almost half that of condominium apartments. Other forms of *Grade-Related Housing* (e.g., semi-detached and townhomes) will provide more attainable housing for most families with lower housing costs.

As mentioned above, the Provincial housing forecasts for the GGH are market-based (noting that they are adjusted by Hemson to account for the gradual shift to higher-density housing that is occurring in this area). These forecasts generally reflect the housing that was built in the first 15 years of the Growth Plan. As such, the forecasts are sound and a good basis for providing housing that will meet the projected needs of current and future residents. By avoiding *Settlement Area Boundary Expansion* and altering the housing mix to satisfy aspirational planning objectives rather than to appropriately house the forecasted population in the current Official Plans, which implement the 2020 Growth Plan, the housing shortage being experienced in the GTHA will be exacerbated, particularly for families.

The 2020 Growth Plan housing forecasts require an overall average of 60% *Grade-Related Housing* units to accommodate families along with 40% for *High-*

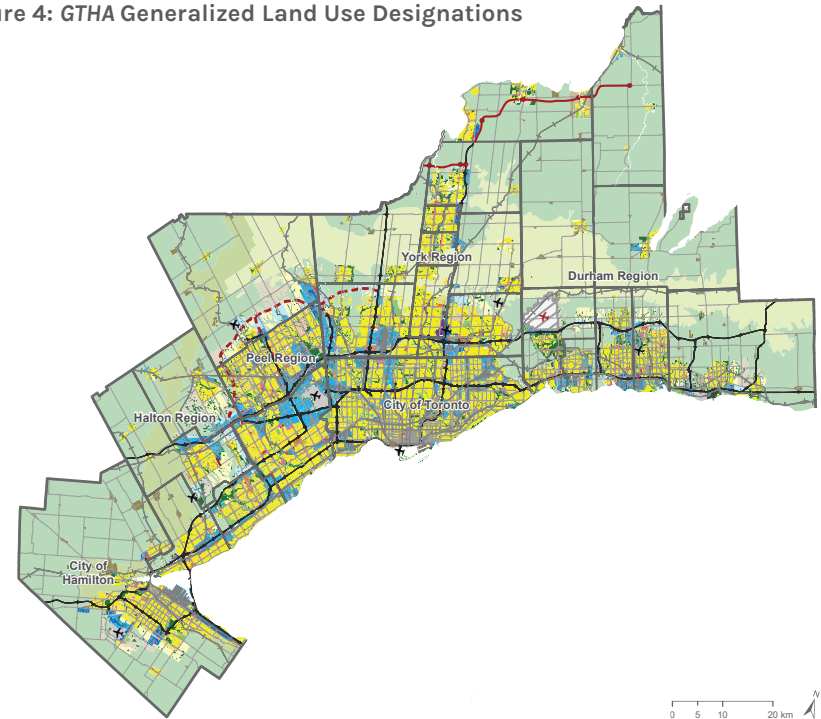
Density apartment units in the *GTHA*. Most of the *GTHA* municipalities have adopted housing mixes that are weighted more to apartments based on their Land Needs Assessments (“LNAs”) that supported the adopted Official Plans, partially to meet the higher intensification targets of the Growth Plan.

The potential for ‘Missing-Middle Housing’ intensification must be unlocked in existing *Built-Up Areas*, particularly the *Low-Density* existing neighbourhoods in the ‘Yellowbelt’.

The ‘Yellowbelt’ includes the areas designated in Official Plans for *Low-Density* housing and comprises approximately 70% of the *Community Area* in the *GTHA* (shown in yellow on Figure 4). This large area of land must be made available immediately for ‘Missing-Middle Housing’ intensification.

Simply offsetting the demand for *Grade-Related Housing* with *High-Density* apartment units is not sufficient from a housing affordability perspective. As noted above, the costs associated with family-sized *High-Density* apartment units is much higher on a per square-foot basis to the costs associated with single-detached units and is higher still than other forms of *Grade-Related Housing*, particularly ‘Missing-Middle Housing’, which provides for a more attainable form of housing, particularly for families.

Figure 4: GTHA Generalized Land Use Designations



Strong changes to the current planning system will be required to allow ‘Missing-Middle Housing’ to be permitted as-of-right and without the need for lengthy planning processes (i.e., multiple development applications). This can be achieved through immediate revisions to Official Plans and the Planning Act to permit, *Grade-Related Housing* and ‘Missing-Middle Housing’ development in *BUAs* as-of-right. It is essential that such uses are permitted in a manner that minimizes or eliminates the significant challenge of ‘Not In My Back Yard’ (“NIMBY”) objections that frequently frustrate the delivery of this form of housing. Municipalities should identify evolving areas where this type of housing is permitted and update Zoning By-laws to pre-zone these areas to permit the full range of ‘Missing-Middle Housing’ forms. In particular, large parts of the *BUA* in the *Study Area* have

insufficient transit-supportive densities (i.e., a minimum of 50 people and jobs per hectare). These large *Low-Density* areas exist as barriers to a sustainable transit network.

Even with the incorporation of such changes, it must be recognized that the realization of *Grade-Related*, '*Missing-Middle Housing*' in existing *BUAs* will be slow and organic. Many of the recent changes to the Planning Act can provide opportunities for additional housing supply in existing neighbourhoods, particularly permitting additional residential units in single-detached, semi-detached and townhouse units. However, the uptake by residents to provide these dwellings has been marginal to date (where an apartment in a flat or duplex comprised only 4% of the housing stock and 3% of the total residential unit growth in the *GTHA* from 2006-2021) and will likely continue to be so, as uptake is limited to those both with the financial means to create additional dwellings and the willingness to become landlords.

Delivering the quantum of *Grade-Related Housing* required to meet the market-based forecasts would require large portions of the existing *BUA* to be completely redeveloped and would also necessitate a large number of current homeowners to become landlords, both of which are unrealistic in the short-term. In addition, much of the housing stock in the *GTHA* has been built within the last 60 years and is generally in good condition. As such, when re-development occurs it is often piecemeal as large areas of dilapidated housing stock are not available for re-development. This is contrasted with the scale of need, where large portions of the *BUA* would need to be redeveloped. In the case of the 905-municipalities, this would require approximately 16% of the *Low-Density* neighbourhoods (or '*Yellowbelt*') in the *BUA* to be demolished and re-built at double or triple the current densities (see Table 5).

Table 5: Proportion of 'Yellowbelt' Redevelopment Required to Accommodate Grade-Related, 'Missing-Middle Housing' in the Low-Density Areas of the BUA without Settlement Area Boundary Expansion

Municipalities	Shortfall of Grade-Related Housing 2021-2051	Land Area Shortfall for Grade-Related Housing (ha)	Estimated BUA Low-Density Residential Land (ha)	% of BUA Low-Density Residential Land for Redevelopment
Region of Durham	(23,100)	(1,200)	12,800	9%
Region of York	(36,600)	(1,800)	22,400	8%
Region of Peel	(59,000)	(3,000)	16,800	18%
Region of Halton	(46,000)	(2,300)	10,100	23%
City of Hamilton	(62,100)	(3,100)	10,000	31%
905-Municipalities Total	(226,800)	(11,400)	72,100	16%
City of Toronto	20,000	1,000	30,200	3%
GTHA Total	(206,800)	(10,400)	102,300	10%
Region of Waterloo	(38,500)	(1,900)	11,000	17%

Notes:

1. Values rounded to nearest 100.
2. Totals may not add up due to rounding.
3. Land area shortfall assumes 20 units/gross hectare.

It should be noted that very few municipalities prepared intensification analyses as part of the 2020 Growth Plan implementation work. These analyses are required to properly assess the real potential for accommodating housing within existing *BUAs* to 2051. The few that did complete such analyses (e.g. Durham Region) identified limited potential for *Grade-Related Housing* intensification in existing neighbourhoods. As such, even with as-of-right permissions for *Missing-Middle Housing*, it is unlikely that the quantum of growth required will occur within the *Yellowbelt* to satisfy forecasted demand.

These factors were not considered in recent studies (such as Regional Planning Commissioners of Ontario issue inventory of Ontario's unbuilt housing supply [Regional Planning Commissioners of Ontario, 2023] and Review of Housing Unit Capacity Identified in Initial Land Needs Assessments Prepared for Upper and Single Tier Municipalities in the Greater Golden Horseshoe [Kevin Eby, 2023]) which render conclusions that there is sufficient housing or land supply (largely through apartments) to meet housing demand forecasts.

There is a shortfall of *Grade-Related Housing* that can be realized to 2051, particularly through intensification. As noted in these reports, much of the supply that is planned would be in the form of *High-Density* apartments, which will not meet market-based demand. To provide for *Grade-Related*, *'Missing-Middle Housing'* in the quantum required by 2051, *Settlement Area Boundary Expansions* are required along with changes to the planning system. The Province and municipalities should continue to open the potential for *'Missing-Middle Housing'* in the *'Yellowbelt'*.

Funding/financing for the infrastructure required to develop housing in the existing *Designated Greenfield Area* is urgently needed to realize housing targets over the next 10 year period.

Much of the existing vacant *DGA* can produce housing within the next 10 years as local policy planning is completed or underway. However, many of these areas lack necessary water, sewer, electrical, and/or transit infrastructure which will delay the realization of growth. Large portions of the *DGAs* (particularly northern York and Halton Regions) have significant and costly infrastructure improvement requirements that are significant constraints to development of the *DGA* land supply.

Similarly, all new *DGAs* have regional and local infrastructure requirements that must be planned and funded. Electricity supply and availability is becoming a Province-wide concern in new growth areas, where *DGAs*, and in some cases existing *BUAs*, do not have electricity capacity (planned nor available) in time for growth to occur. The timely provision of infrastructure to enable growth is vital to delivering housing in the next 10 years to meet the Province's housing targets. Any lands that can be developed in the short-term with available infrastructure should be prioritized to achieve the Province's housing targets.

One of the primary means of unlocking housing in the next 10 years is to immediately finance/fund the provision of all necessary infrastructure to enable short-term housing and jobs within the existing *DGA*. The lack of readily developable land from the *GTHA* land supply is generally attributable to the consumption of more readily built sites from 2006-2021. Remaining and new lands for housing in the *DGAs* face increasing developability challenges as they require significant infrastructure investment and are also subject to extensive secondary planning and tertiary planning requirements. These delays are compounded and exacerbated by fierce opposition to growth in the form of NIMBYism and anti-growth special interests, as well as local politics in built-up intensification areas.

Additional solutions to fund and deliver much needed infrastructure must be realized in the short-term to enable the development of short-term housing supply. The Provincial and Federal government need to immediately provide funding/financing for the infrastructure required to develop housing, prioritizing lands that will result in housing that can be delivered in the short-term once infrastructure is available.

→ No *Settlement Area Boundary Expansions* will lead to significant shifts in lifestyle (primarily families in *High-Density* apartment units).

Some municipalities which have adopted a no *Settlement Area Boundary Expansion* approach to growth through their Official Plans, appear to have done so to avoid *'Sprawl'*. *'Sprawl'* generally has many elements. One defining metric is that *'Sprawl'* occurs with unplanned growth where the rate of expansion of land outpaces the rate of population growth.

It is a misconception that all urban expansions result in *'Sprawl'*. Well planned *Settlement Area Boundary Expansions*, where the rate of land consumption is well below the rate of population growth, is not *'Sprawl'*. New communities planned in the *GTHA* since the early 2000s are generally more dense, have a range of

housing choices, provide a mix of uses, and are walkable and transit-supportive – they are smart growth communities that are well planned. Responsible and well-planned communities are the measured and necessary outward growth required to accommodate a growing population and provide robust market-based and appropriate housing options.

Based on the lands designated for growth to 2051, as approved by the Province, the rate of *Community Area* land expansion is 7% from 2031-2051 compared to a forecasted population growth rate of 24% in that timeframe for the *GTHA* (see Table 6). The *GTHA* is not *Sprawling*; the amount of land designated for growth to 2051, as approved by the Province in November 2022 and April 2023, is by no measure considered to be '*Sprawl*'; as it is adding additional land required for smart growth of much needed housing choice for new residents.

Table 6: Comparison of Community Area and Population Growth Rates, 2031-2051

GTHA Municipalities	Rate of Community Area Land Expansion	Rate of Population Growth
Region of Durham	10%	34%
Region of York	7%	27%
Region of Peel	11%	29%
Region of Halton	9%	34%
City of Hamilton	11%	21%
City of Toronto	0%	14%
GTHA Total	7%	24%

While the Province modified Official Plans in the *GTHA* along with other upper-tier and single-tier Official Plans in the *Outer Ring* to provide additional *Community Area* land, there remains a significant shortage of land to meet the forecasted market-based housing types. The land supply, even as approved by the Province, will not be able to meet the forecasted housing needs in the *GTHA* or the *Outer Ring*. The incongruent of land supply (underestimated due to assumptions for unprecedented shifts in the future housing mix) with market-based housing

demand, will leave many families with no choice but to shift into *High-Density* apartment unit types due to a lack of available *Grade-Related Housing* or relocate to areas outside of the *GTHA* and *Outer Ring* where suitable housing options are available and attainable.

There continues to be significant affordability challenges in delivering family-oriented (two- and three-bedroom) *High-Density* apartment units in the quantities required to accommodate a transition away from *Grade-Related Housing*. In addition to the relatively higher cost of materials (particularly constructing in concrete and steel), there are challenges to delivering this housing along with the hard and community infrastructure (e.g., sewer and water services, schools, parks, community centres) required, particularly in existing neighbourhoods. The more the population within the existing *Settlement Area* increases, so does the demand for schools, parks, and other hard and community infrastructure.

There remains a lack of sufficient transit infrastructure throughout many parts of the *GTHA* to facilitate the transition away from automobile dependency for most residents. The original 2006 Growth Plan was complemented by The Big Move, a regional transportation plan, prepared by Metrolinx. The transportation-related projects identified in The Big Move to 2031 were intended to align with the forecasted growth being planned for in the same timeframe. However, many of the projects under The Big Move have not been delivered. Unlike the original 2006 Growth Plan, the 2020 Growth Plan was not complemented by an updated regional transportation planning document (Metrolinx's 2041 Regional Transportation Plan (2018) did provide an updated plan to the 2041 planning horizon, but was not updated to the 2051 planning horizon in the 2020 Growth Plan) as a result, the full extent of new transit service required to support growth to 2051 have not been identified nor planned for.

To realize the shift in the housing mix currently being planned for by municipalities in the *GTHA*, affordable, family-oriented *High-Density* apartment units in complete neighbourhoods needs to be expedited (likely supported by significant Federal and Provincial funding) with a focus in Major Transit Station Areas to provide maximum flexibility and accessibility to transit.

A modern and stable planning system is required to realize the forecasted growth in the *GGH*.

Modernizing the planning system should provide for the delivery of housing with the fewest steps between lands being designated for development in Official Plans and development permits. Good planning is essential; however, planning should occur during the establishment of the Official Plan and development should then occur shortly after the Official Plan is completed. The need for secondary planning, tertiary planning, zoning, and other planning tools add delays of approximately 8-10 years to the process between the designation of land for development and construction. In addition to reducing lengthy planning and development processes, it is essential that the planning system enables a co-operative approach where developers and municipalities can work together with certainty to build communities and *Employment Areas*.

Over the past 10 years, there have been numerous changes to the Planning Act, Development Charges Act, Conservation Authorities Act, and other key development-related pieces of legislation. Many of the changes have not been fully implemented, nor has technical guidance or prescribed information been provided to operationalize sections under these Acts. Some of the changes reverse recently implemented changes from prior initiatives (e.g., affordable and attainable housing definitions, the removal of upper-tier municipalities as planning authorities, refunding of application fees, parkland dedication requirements, Development Charge requirements, and a new Provincial Planning Statement and proposed rescinding of the 2020 Growth Plan, etc.). Most recently, the Province's

proposed 2023 'resetting' of recently approved upper-tier and single-tier Official Plans will significantly delay the completion of master infrastructure planning and development charge studies required to plan and finance infrastructure which will result in significant delays in the delivery of housing and jobs in all timeframes.

As a result, in an already lengthy process, municipalities and developers alike are struggling to implement these Acts to build communities and *Employment Areas*. The many and disruptive changes to the planning system that have occurred over the past 10 years continue to reform and adjust planning processes and delay development. These changes will frustrate the realization of planned growth further into the future as an expedited delivery of housing and jobs cannot be achieved in an ever-changing planning system. The Province should undertake a comprehensive review of the planning and development approvals processes to modernize and simplify planning controls. Such a review should include a wide-reaching group of stakeholders and should be focused on a system that leads to the most efficient path from Official Plans to development permits.

Greater Toronto & Hamilton Area

Demographics

- 20% population growth occurred between 2006 and 2021 (1,221,223 people not adjusted for undercount).
- 18% employment growth occurred between 2006 and 2021 (519,795 jobs).
- There has been a notable shift in the proportion of single- and semi-detached units across the *GTHA*, with each Region experiencing a decrease in the overall proportion of these unit types. Overall, the *GTHA* has experienced a decrease from 52% in 2006 to 49% in 2021 in the composition of units that are single- and semi-detached.
- The *GTHA*'s main housing type is predominantly *Grade-Related*, where only 28% of the population lives in apartments which comprise 37% of the total occupied *Private Dwellings* in 2021.
- In 2021, *Housing Suitability* is worsening for households living in one-bedroom dwellings. 16% of one-bedroom dwellings (up from 14% in 2016) accommodate households that require additional bedrooms in order to be housed suitably. The *Housing Suitability* for two-bedroom dwellings remains steady at 14%.
- In 2021, 71% of all households were comprised of families, where 81% of households have two-bedrooms or more.

- The *GTHA* accommodated 32% of Canada's national immigration between 2016 and 2021, where immigration was overwhelmingly comprised of younger immigrants, with 45% age 24 and under, and 45% between the ages of 25-44.
- In 2021, *Apartments or Flats in a Duplex* comprised 4% of the total units in the *GTHA* and 3% of the total unit growth from 2006 to 2021. This is likely to continue to reflect the potential for additional units from secondary and tertiary suites as a component of growth moving forward to 2051.

Growth Forecasts & Land Needs

- Based on the 2020 Growth Plan, the *GTHA* is forecast to accommodate 75% of the population (11,170,000 people) and 76% of the employment (5,360,000 jobs) within the *GGH* by 2051.
- 77% of the population growth (2,688,000 people), 86% of the household unit growth (1,024,000 units), and 80% of employment growth (1,205,000 jobs) within the 2006-2031 *GGH* forecast (from the Growth Plan and supporting technical documents) is to occur within the *GTHA*.
- Beyond the original 2031 forecast, 74% of the population growth (2,160,000 people), 71% of the household unit growth (936,600 units), and 71% of the employment growth (970,000 jobs) within the 2031-2051 *GGH* forecast (from the Growth Plan and supporting technical documents) is to occur within the *GTHA*.

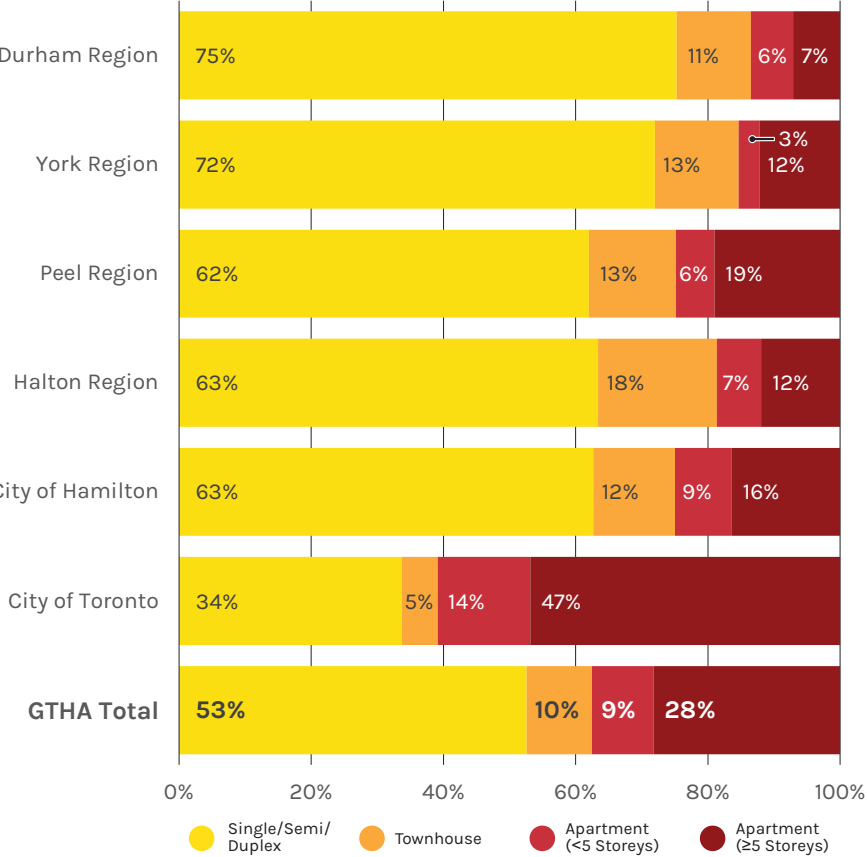
- As of 2021, the *GTHA* has a housing shortfall of 18,500 *Grade-Related Housing* units and 59,400 apartment units based on the original forecasts of the Growth Plan.
- The *GTHA*'s 2021-2051 housing forecast for apartments (58% and 881,300 units) is higher than the Province's (through Hemson) forecasted apartment growth (40% and 554,500 units) and is aspirational when compared to the 47% share of apartment growth (240,600 units) from 2006 to 2021.
- Based on the adopted Official Plans, the projected shortfall of *Grade-Related Housing* units in the *GTHA* will be 206,800 units to the year 2051, equating to a land shortfall of approximately 10,400 ha. If this shortfall were provided for in the *BUA* of the *GTHA*, it would require 10% of existing neighbourhoods to be re-developed.
- Only 2% of the land supply in *Settlement Area Boundary Expansion Areas* to accommodate growth from 2031 to 2051 is *Committed*, 98% is still *Vacant*.
- The *Settlement Area Boundary Expansion Area* that is to accommodate growth from 2031-2051 represents a 7% increase of the *GTHA*'s *Settlement Area*, compared to a 24% population increase.
- There is 12,300 ha of *Whitebelt* land remaining to accommodate growth in the *GTHA* outside of Provincial Plan areas.

Land Supply

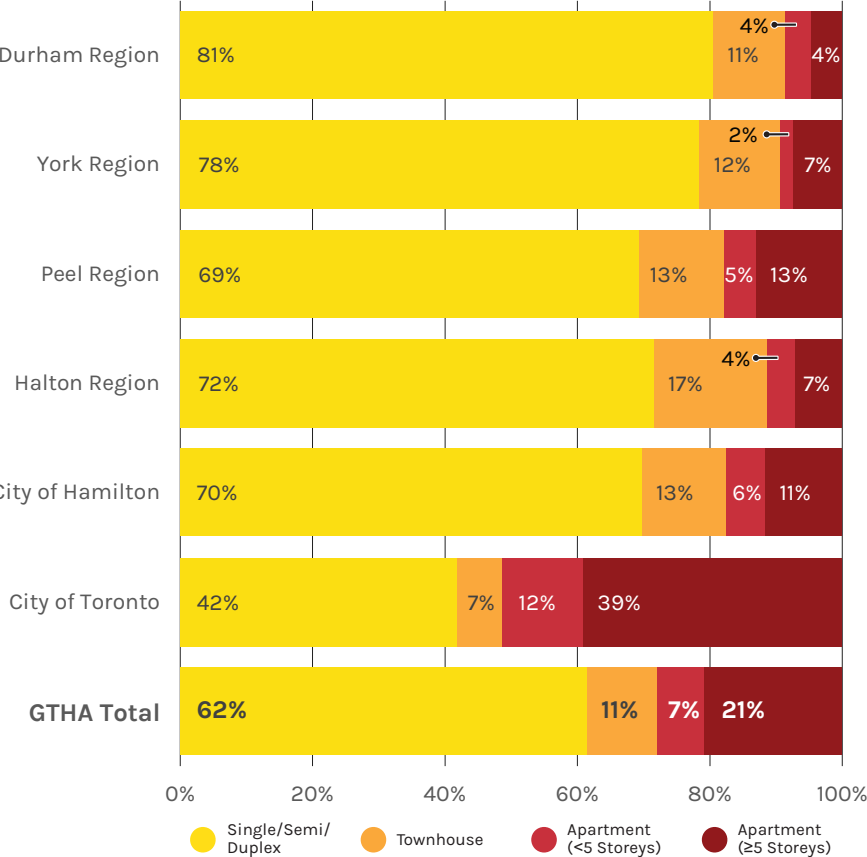
- 28% of the total *DGA* in the *GTHA* has been *Built*, of which 32% of the *Community Area DGA* and 16% of the *Employment Area DGA* have been *Built*.
- 41% (25,000 hectares) of *DGA* land in the *GTHA* is *Vacant Community Area*.
- Approximately 70% of land within the *Community Area* (including both the *BUA* and *DGA*) in the *GTHA* is within a *Low-Density* designation (commonly referred to as the '*Yellowbelt*') which has inherent challenges to delivering significant intensification. In general, the population and employment densities in the '*Yellowbelt*' remain at or below the 50 people and jobs combined per hectare.
- 10% of *Community Area DGA* and 16% of *Employment Area DGA* in the *GTHA* was consumed from 2018-2023.

Demographic Overview

Occupied Private Dwellings by Type, 2021

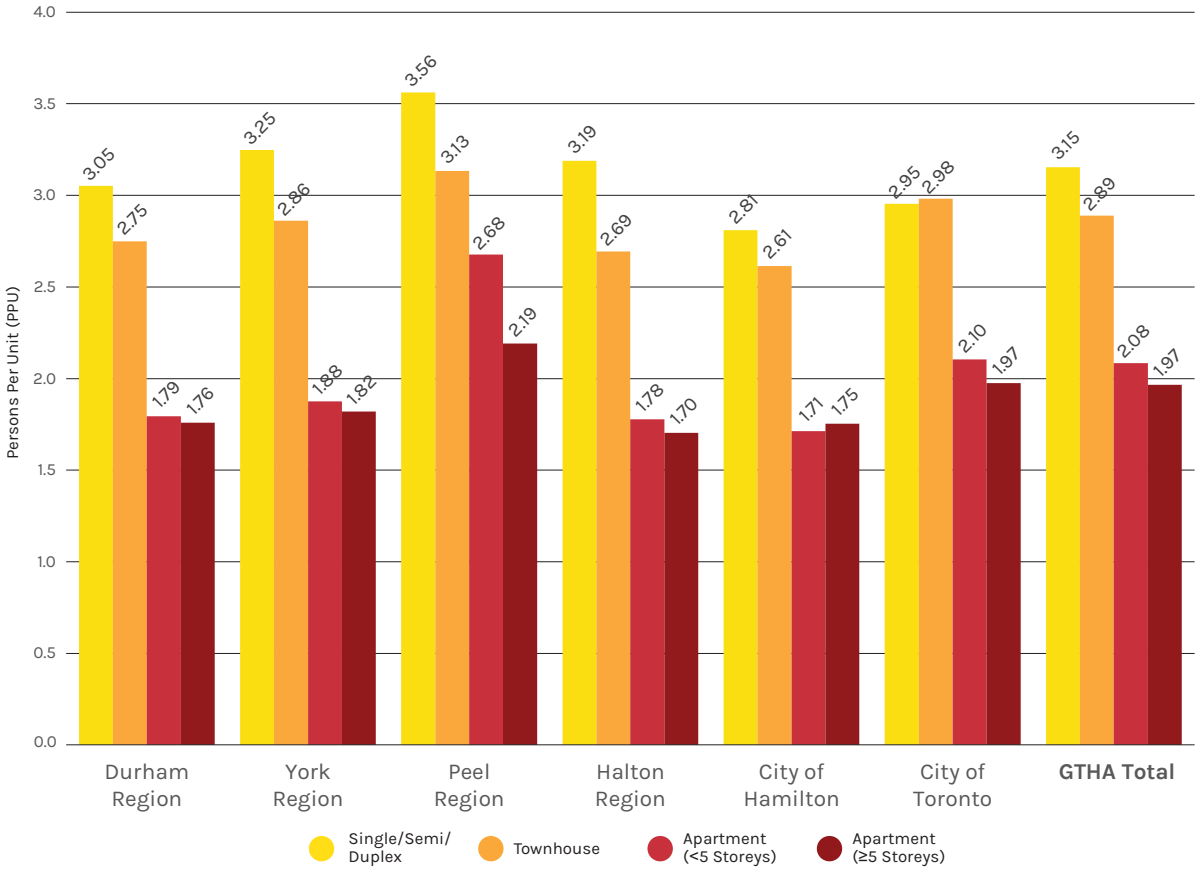


Population by Private Dwelling Type, 2021

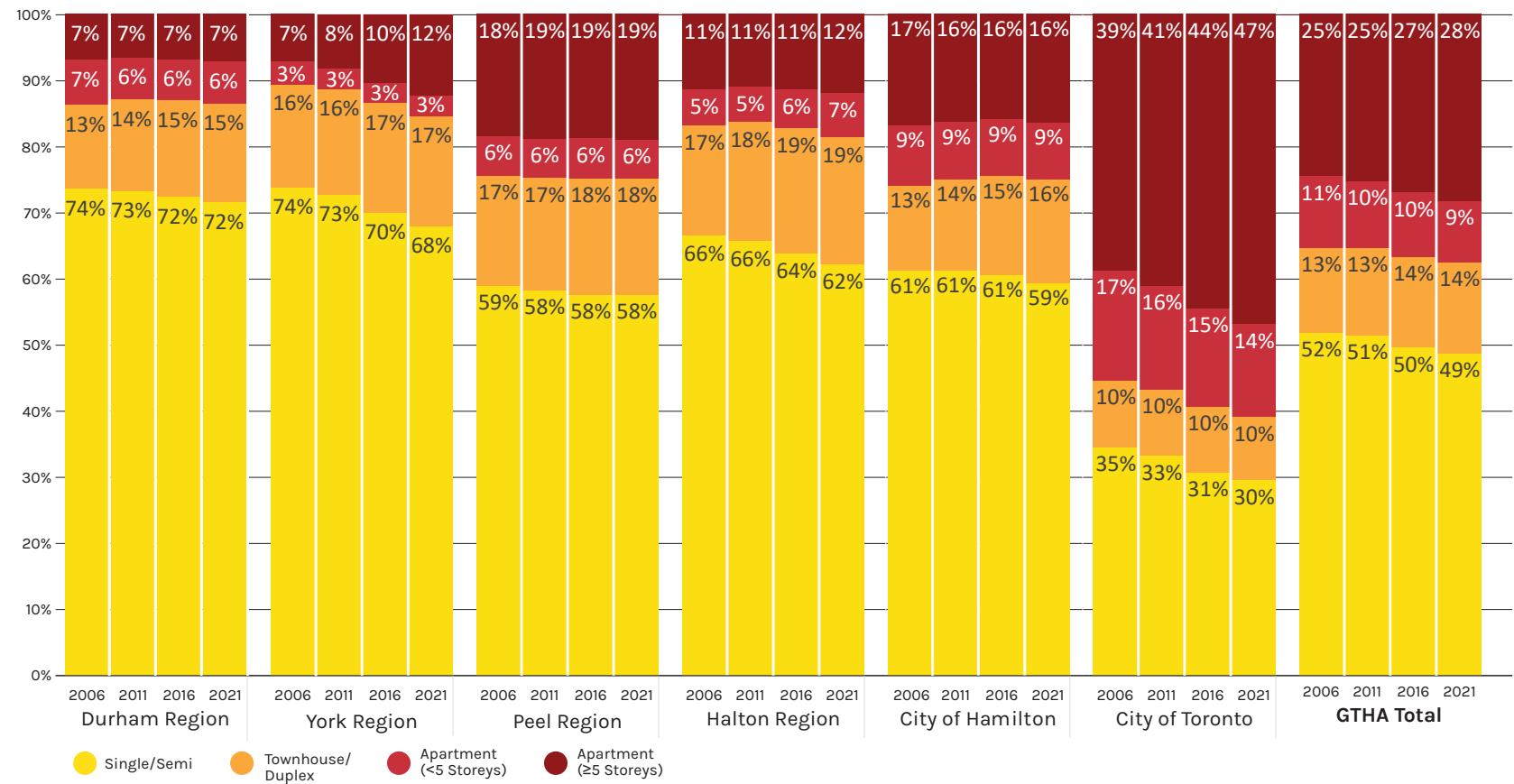


Note: Percentages may not add to 100 due to rounding.

Persons Per Unit (PPU) by Private Dwelling Type, 2021

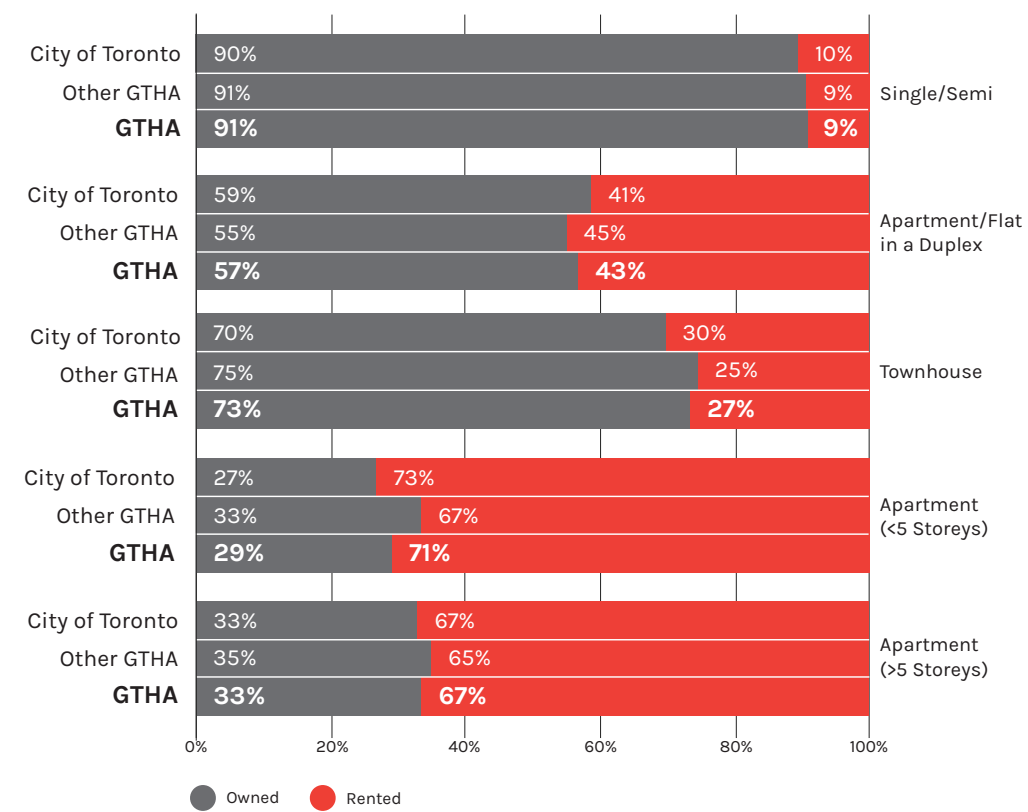


Unit Type Mix in the GTHA by Region, 2006 to 2021



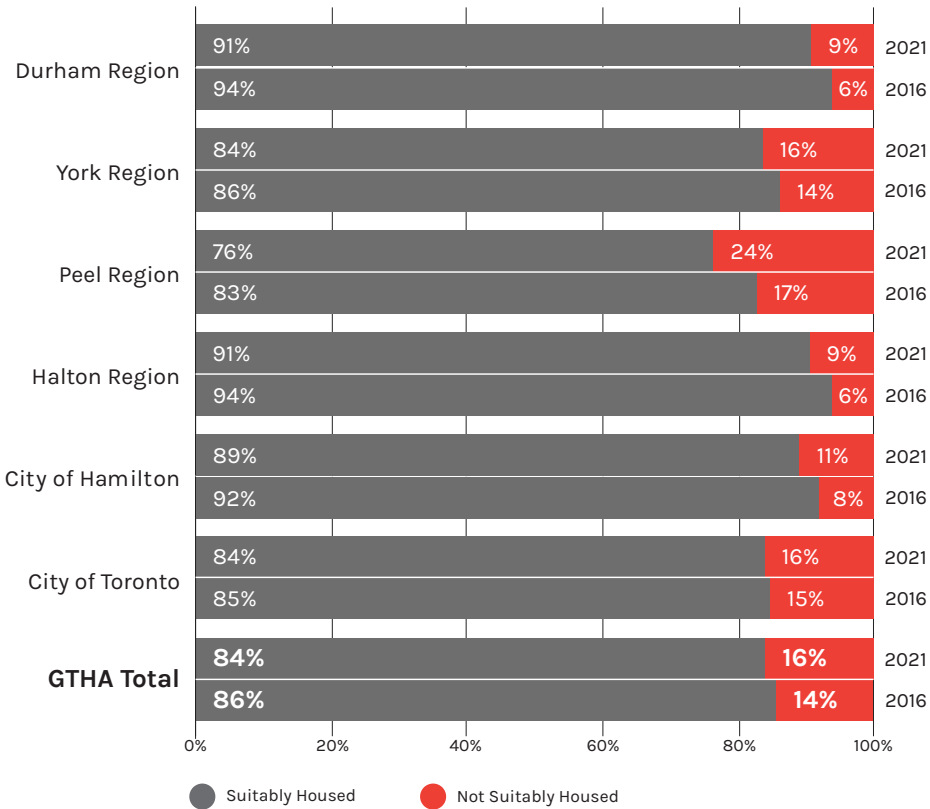
Note: Percentages may not add to 100 due to rounding.

Structural Type by Dwelling Tenure, 2021

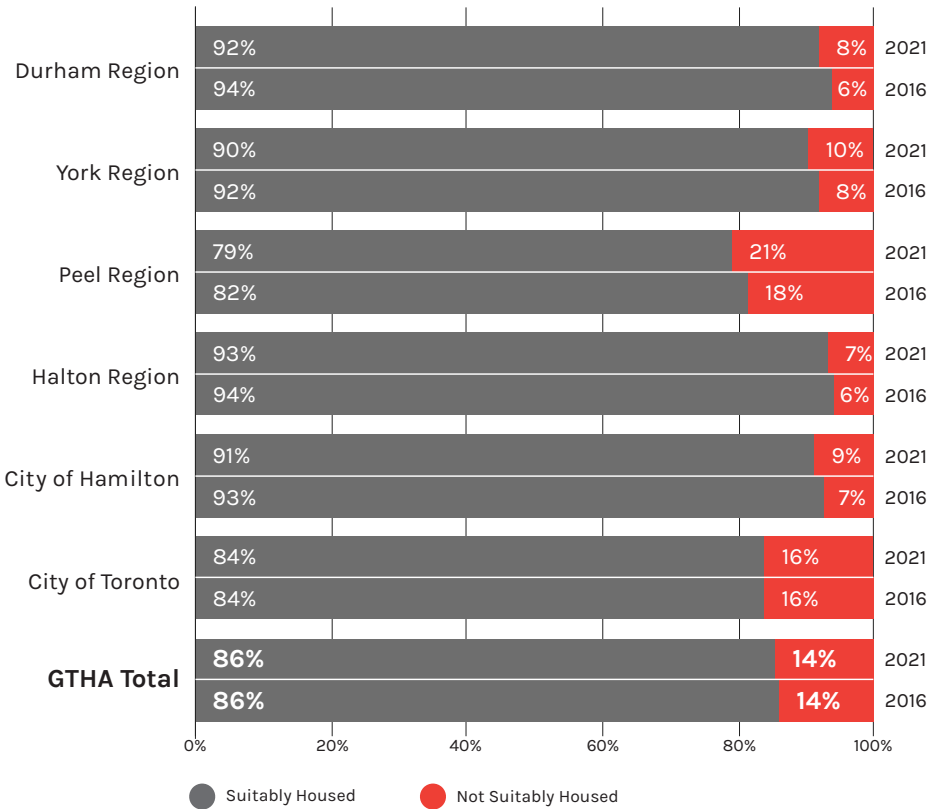


Note: Percentages may not add to 100 due to rounding.

Housing Suitability for All Households with One-Bedroom, 2016 to 2021

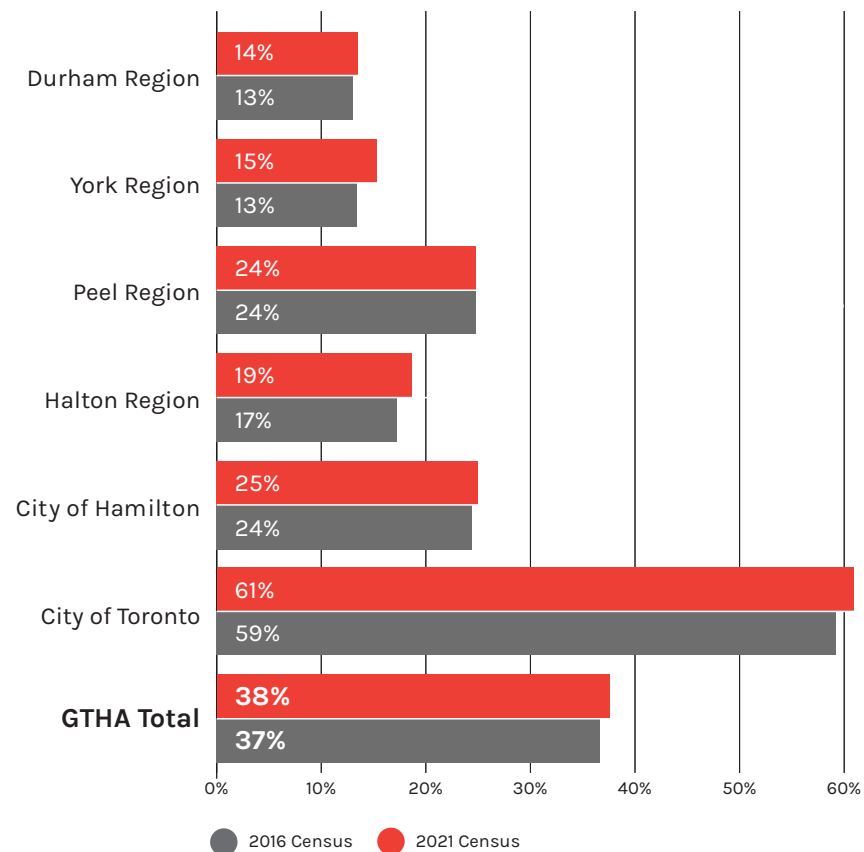


Housing Suitability for All Households with Two-Bedrooms, 2016 to 2021



Notes:
1. Percentages may not add to 100 due to rounding.
2. Housing suitability refers to whether a private household is living in suitable accommodations, ie., whether the dwelling has enough bedrooms for the size and composition of the household, (Statistics Canada).
Comparable data from the 2006 census was unavailable, therefore 2016 Census data was used to demonstrate a trend of increasing unsuitability of all private 1 and 2 bedroom households.

Proportion of Apartment Dwelling Units, 2016 to 2021



Note: Percentages may not add to 100 due to rounding.

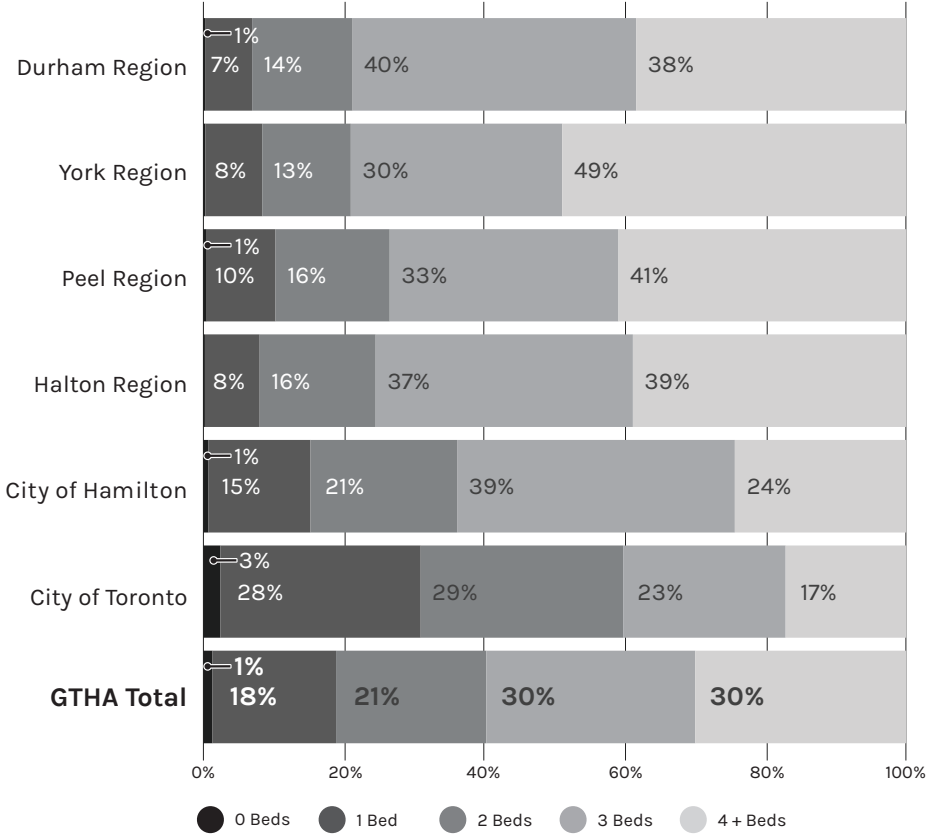
Apartments or Flats in a Duplex, 2021

GTHA Municipalities	Apartments or Flats in a Duplex	Total Units	% of Apartments or Flats in a Duplex
Durham Region	8,945	242,675	4%
York Region	15,820	390,535	4%
Peel Region	20,185	450,315	4%
Halton Region	2,490	208,370	1%
City of Hamilton	7,380	222,245	3%
City of Toronto	47,810	1,158,040	4%
GTHA Total	102,630	2,672,180	4%

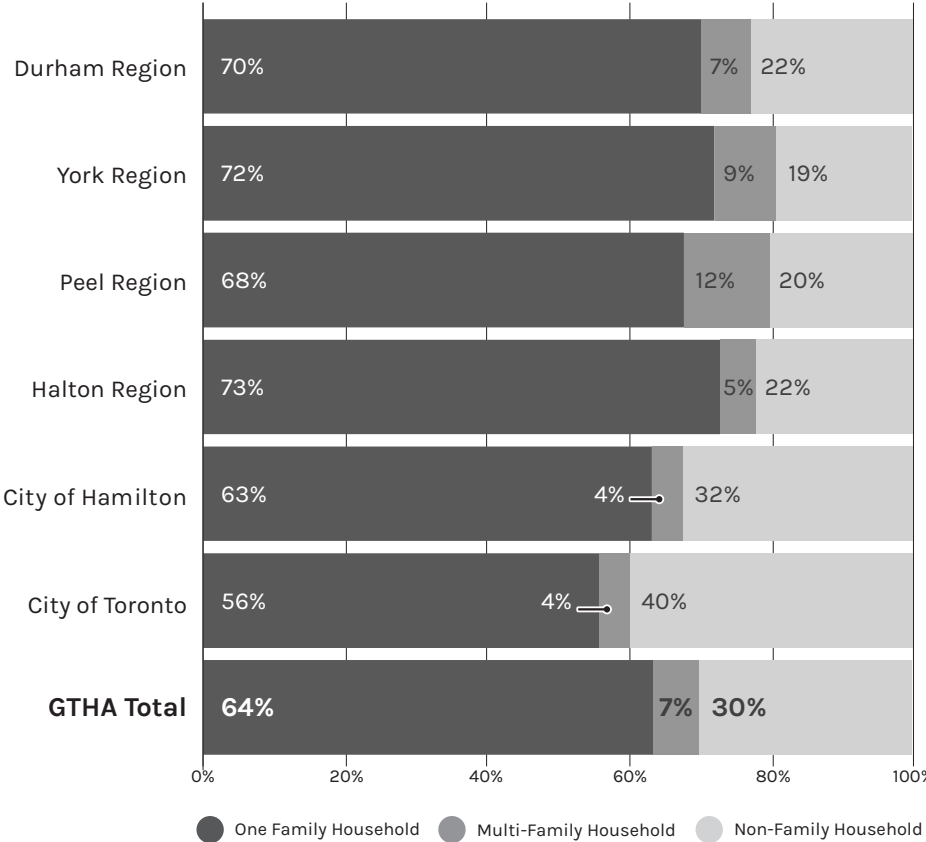
Apartments or Flats in a Duplex Growth, 2006 to 2021

GTHA Municipalities	Apartments or Flats in a Duplex Growth	Total Unit Growth	% of Apartments or Flats in a Duplex Growth
Durham Region	2,410	48,480	5%
York Region	1,645	115,265	1%
Peel Region	5,570	92,065	6%
Halton Region	0	51,585	0%
City of Hamilton	1,145	28,585	4%
City of Toronto	4,360	180,125	2%
GTHA Total	15,130	516,105	3%

Number of Bedrooms per Household, 2021

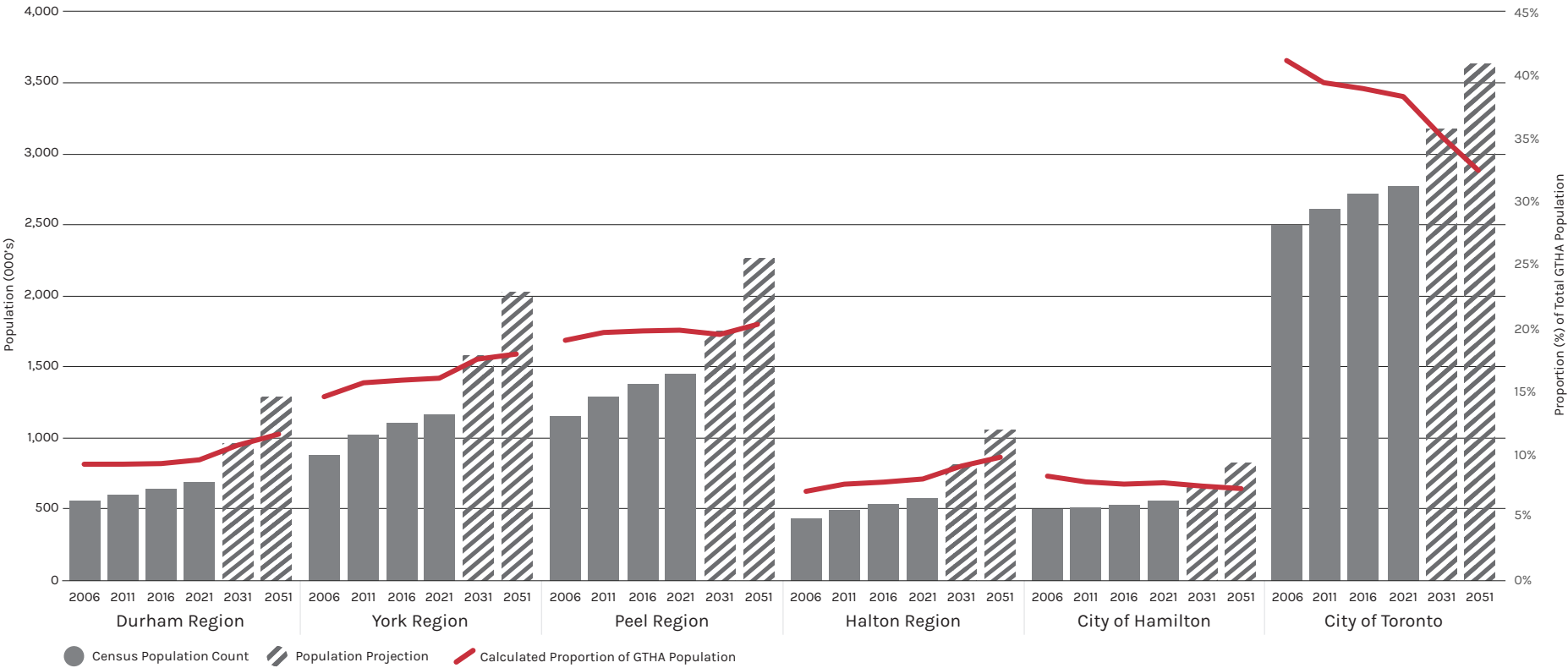


Household by Family Type, 2021



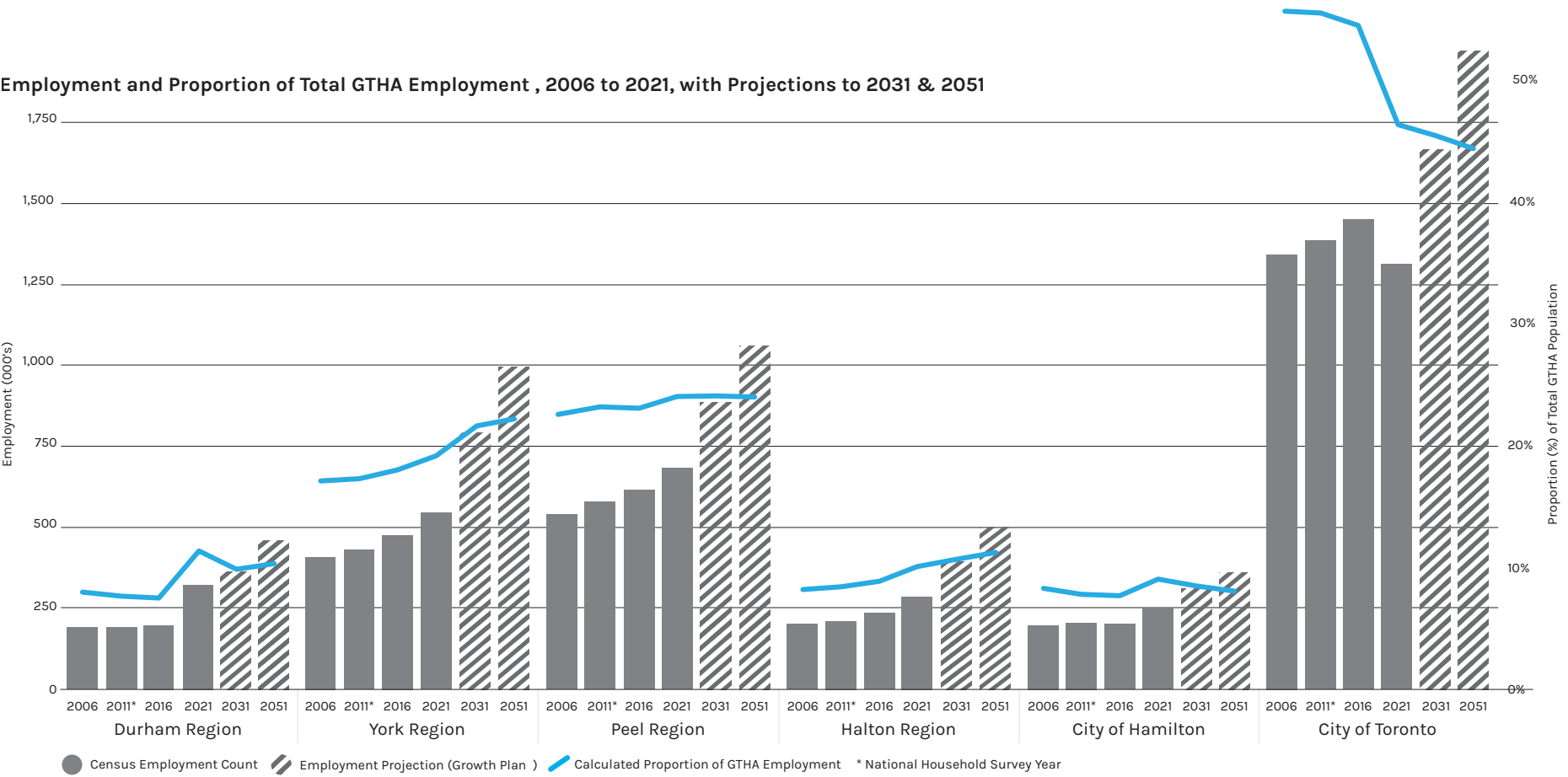
Note: Percentages may not add to 100 due to rounding.

Population and Proportion of Total GTHA Population, 2006 to 2021, with Projections to 2031 & 2051

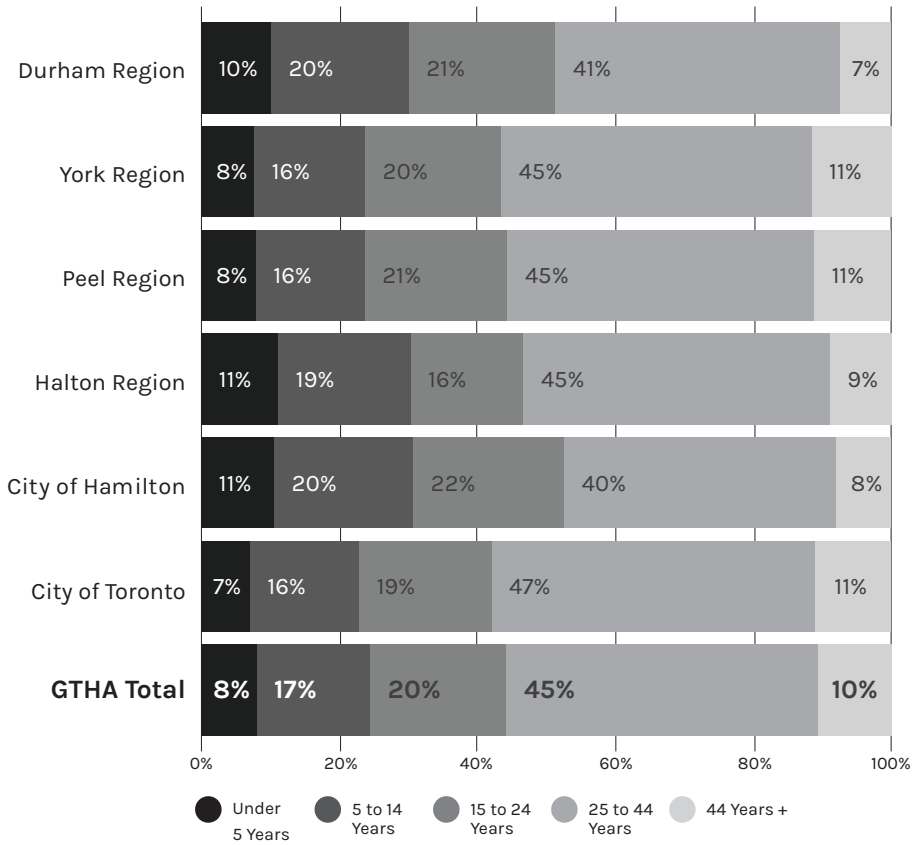


Note: Population has not been adjusted for undercount. This typically results in a 3-5% increase in the total population.

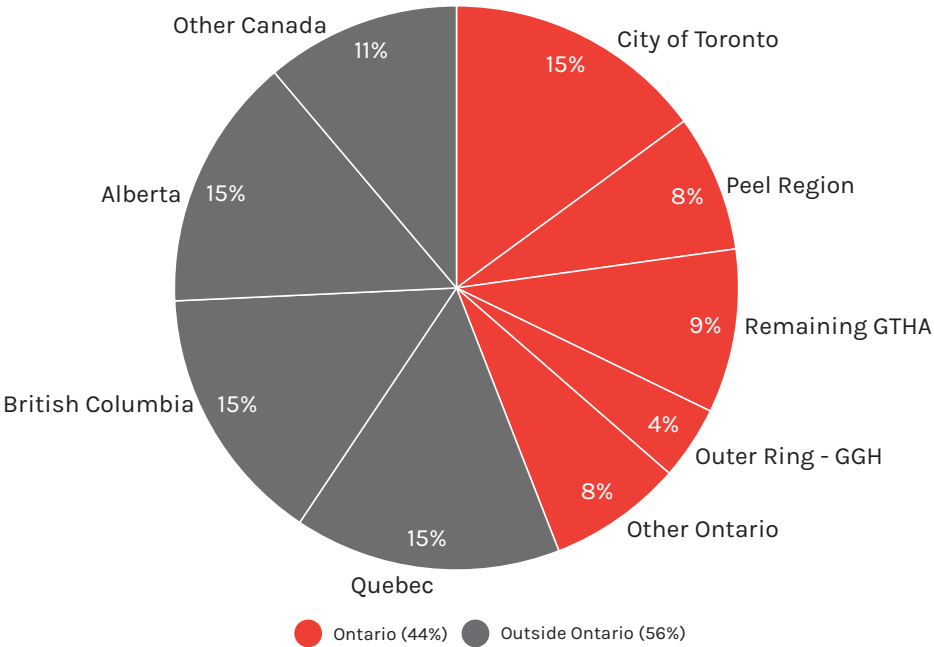
Employment and Proportion of Total GTHA Employment , 2006 to 2021, with Projections to 2031 & 2051



Age at Immigration for Total Immigrant Population, 2021



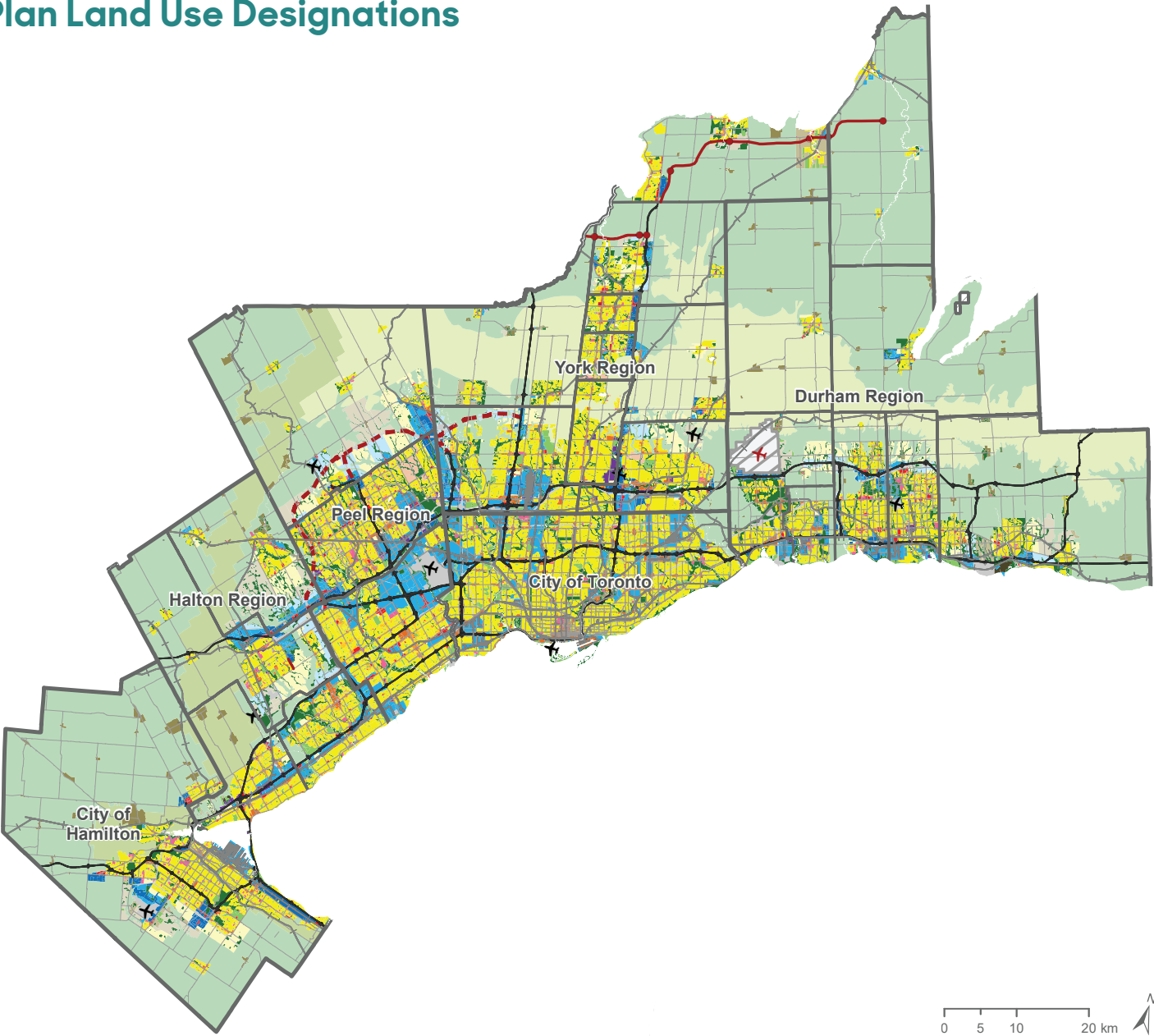
Proportion of National Immigration, 2021



Note: Percentages may not add to 100 due to rounding.

Generalized Official Plan Land Use Designations

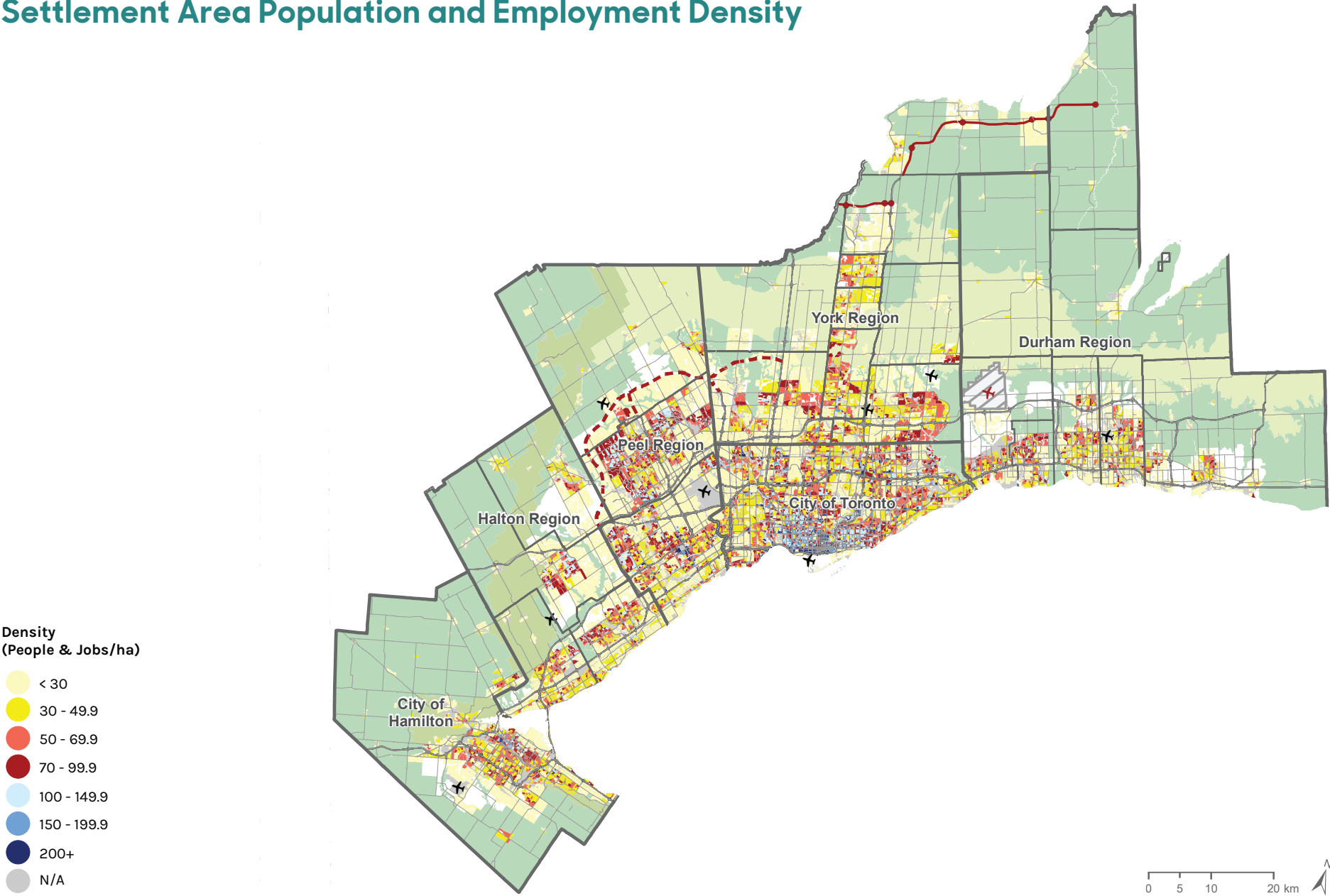
- Generalized Land Use Designations**
- Community Area - Designation to be Determined
 - Estate Residential
 - Low Density Residential
 - Medium Density Residential
 - High Density Residential
 - General Commercial
 - Retail Commercial
 - Employment Area - Designation to be Determined
 - General Employment
 - Prestige Employment
 - Mixed Use Residential
 - Mixed Use Employment
 - Institutional
 - Recreation-Park
 - Environmental
 - Major Highway/Utility
 - Extraction Area
 - Agricultural
 - Rural
 - Rural Settlement
 - Study Area



Note: Generalized land use designations for illustrative purposes only.

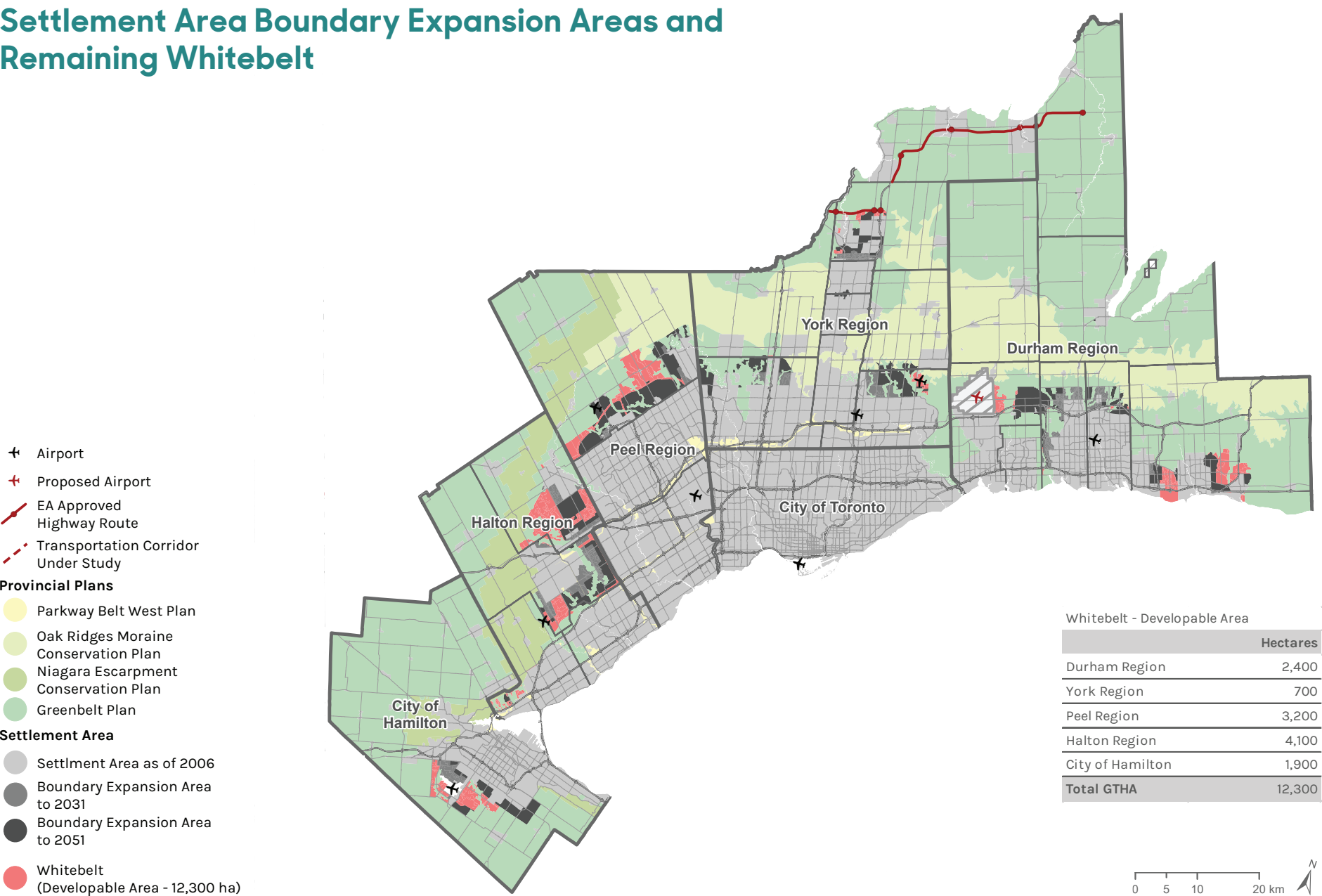
Settlement Area Population and Employment Density

GTHA



Note: Density by Census Dissemination Area

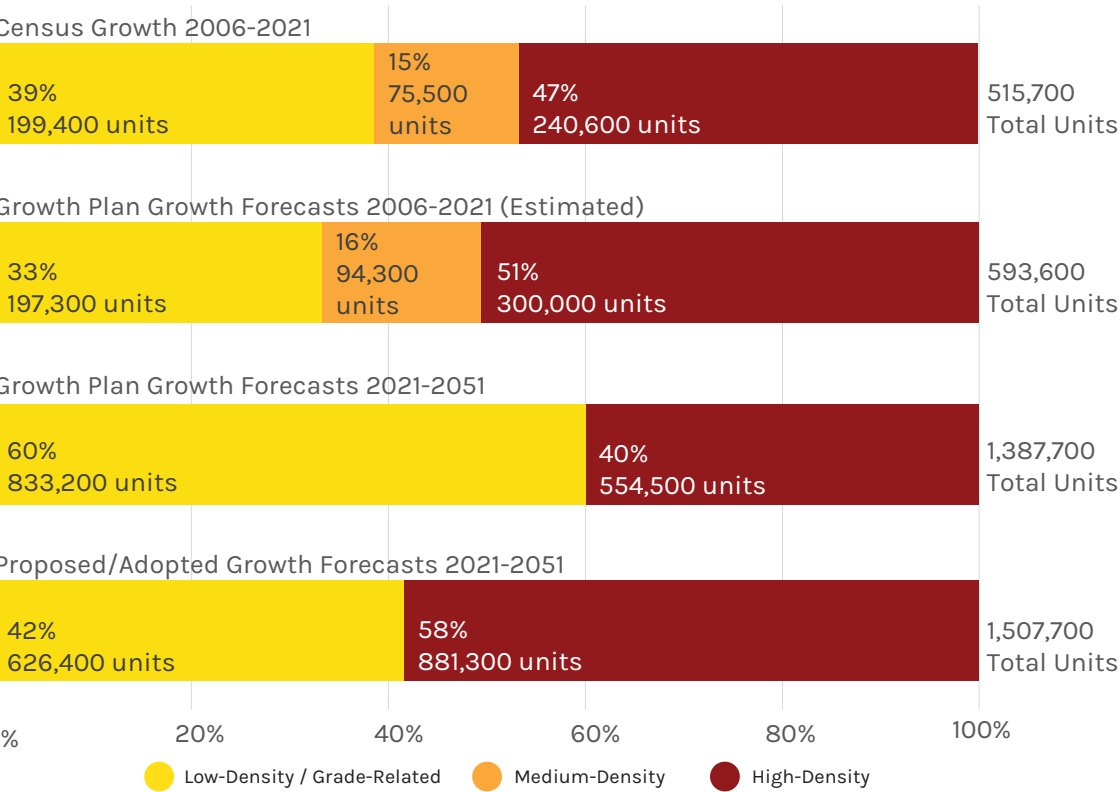
Settlement Area Boundary Expansion Areas and Remaining Whitebelt



Note: SABE Areas to 2051 are Provincially approved with the exception of Durham Region. Lands for Durham Region are adopted by the Region with approved lands still to be determined.

Unit Growth/Forecasts and Land Needs Assessment Comparisons

GTHA Unit Growth/Forecasts



- Notes:
- 1. Adopted Official Plan unit growth forecasts based on the Land Needs Assessment scenario that supported the adopted Official Plan.
 - 2. City of Toronto's "Our Toronto Plan: Land Needs Assessment" dated June 2022, assumed as adopted.
 - 3. Values rounded to nearest 100.
 - 4. Totals may not add up due to rounding.
 - 5. See Appendix for full set of notes.

Comparisons

Census Growth vs. Growth Plan
Growth Forecasts 2006-2021

Shortfall (-) / Surplus (+)	
Low-Density	-41,000
Medium-Density	-16,700
High-Density	-36,100
Total Units	-93,800

Adopted Official Plans vs. Growth Plan
Growth Forecasts 2021-2051

Shortfall (-) / Surplus (+)	
Grade-Related	-206,800
High-Density	+326,800
Total Units	+120,000

Regionally Adopted OP vs. Provincially Approved OP
Settlement Area Boundary Expansion Area

	Regionally Adopted	Provincially Approved
Community Area (ha)	7,500	13,100
Employment Area (ha)	3,800	5,300
Total SABE Area (ha)	11,300	18,400

Comparison of Community Area Land Growth versus Population Growth

Rate of Community Area Land Growth

Community Area	City of Toronto	Durham Region	York Region	Peel Region	Halton Region	City of Hamilton	Total GTHA
Community Area as of 2006	42,400 ha	25,000 ha	39,100 ha	33,400 ha	19,400 ha	17,200 ha	176,500 ha
Settlement Area Boundary Expansion Areas to 2031	0 ha	1,500 ha	1,700 ha	300 ha	2,000 ha	100 ha	5,500 ha
Settlement Area Boundary Expansion Areas to 2051	0 ha	2,600 ha	2,900 ha	3,800 ha	1,900 ha	1,900 ha	13,100 ha
Growth Rate 2006-2031	0%	6%	4%	1%	10%	0%	3%
Growth Rate 2031-2051	0%	10%	7%	11%	9%	11%	7%

Rate of Population Growth

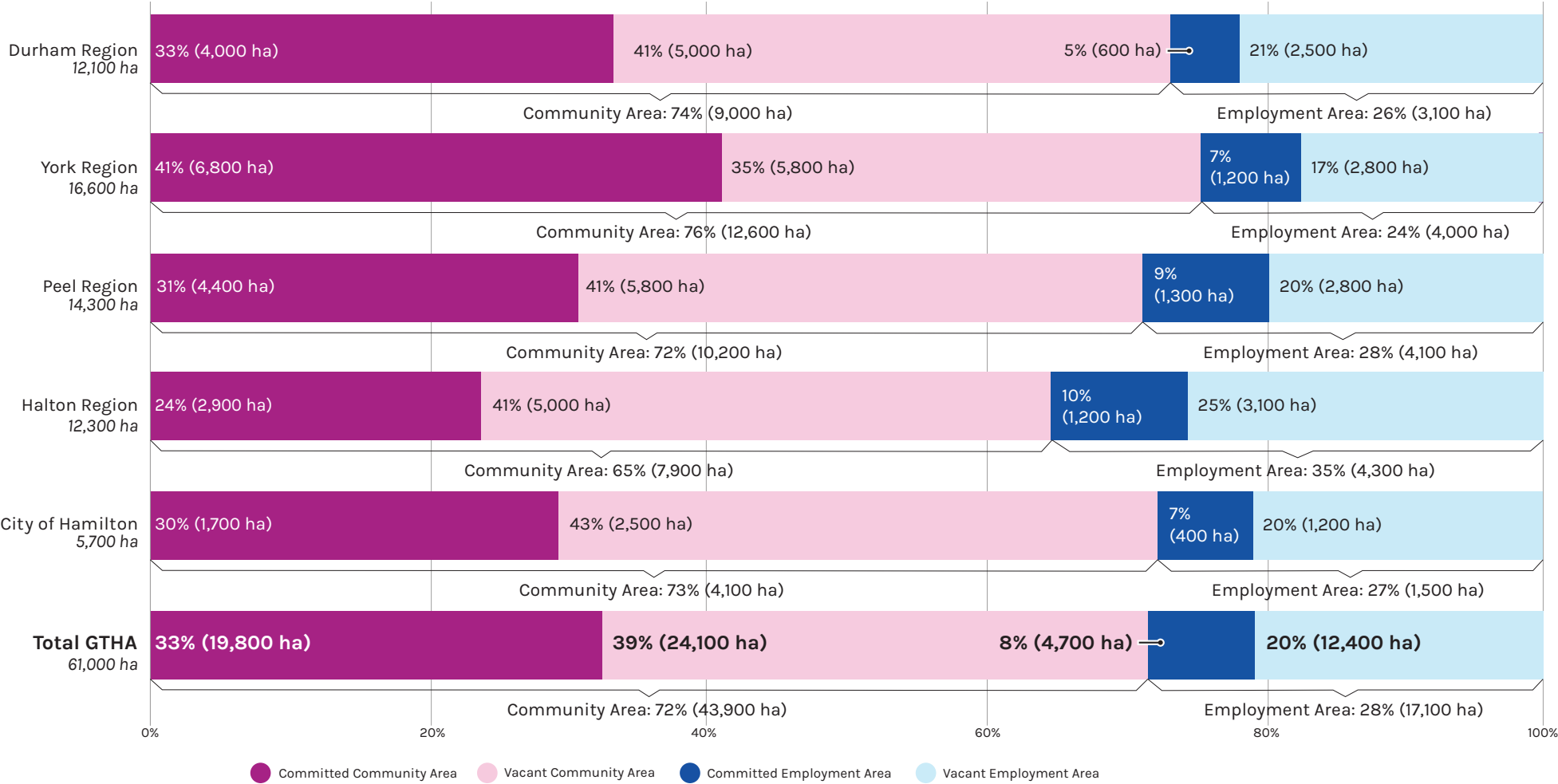
	City of Toronto	Durham Region	York Region	Peel Region	Halton Region	City of Hamilton	Total GTHA
2006 Existing Population	2,503,300	561,300	892,700	1,159,400	439,300	504,600	6,060,500
2031 Forecasted Population	3,190,000	970,000	1,590,000	1,770,000	820,000	680,000	9,010,000
2051 Forecasted Population	3,650,000	1,300,000	2,020,000	2,280,000	1,100,000	820,000	11,170,000
Growth Rate 2006-2031	27%	73%	78%	53%	87%	35%	49%
Growth Rate 2031-2051	14%	34%	27%	29%	34%	21%	24%

Notes:

1. Settlement Area Boundary Expansion Areas based on Provincially approved Official Plans.
2. Values rounded to the nearest 100.
3. Totals may not add up due to rounding.
4. Land areas calculated by MGP.

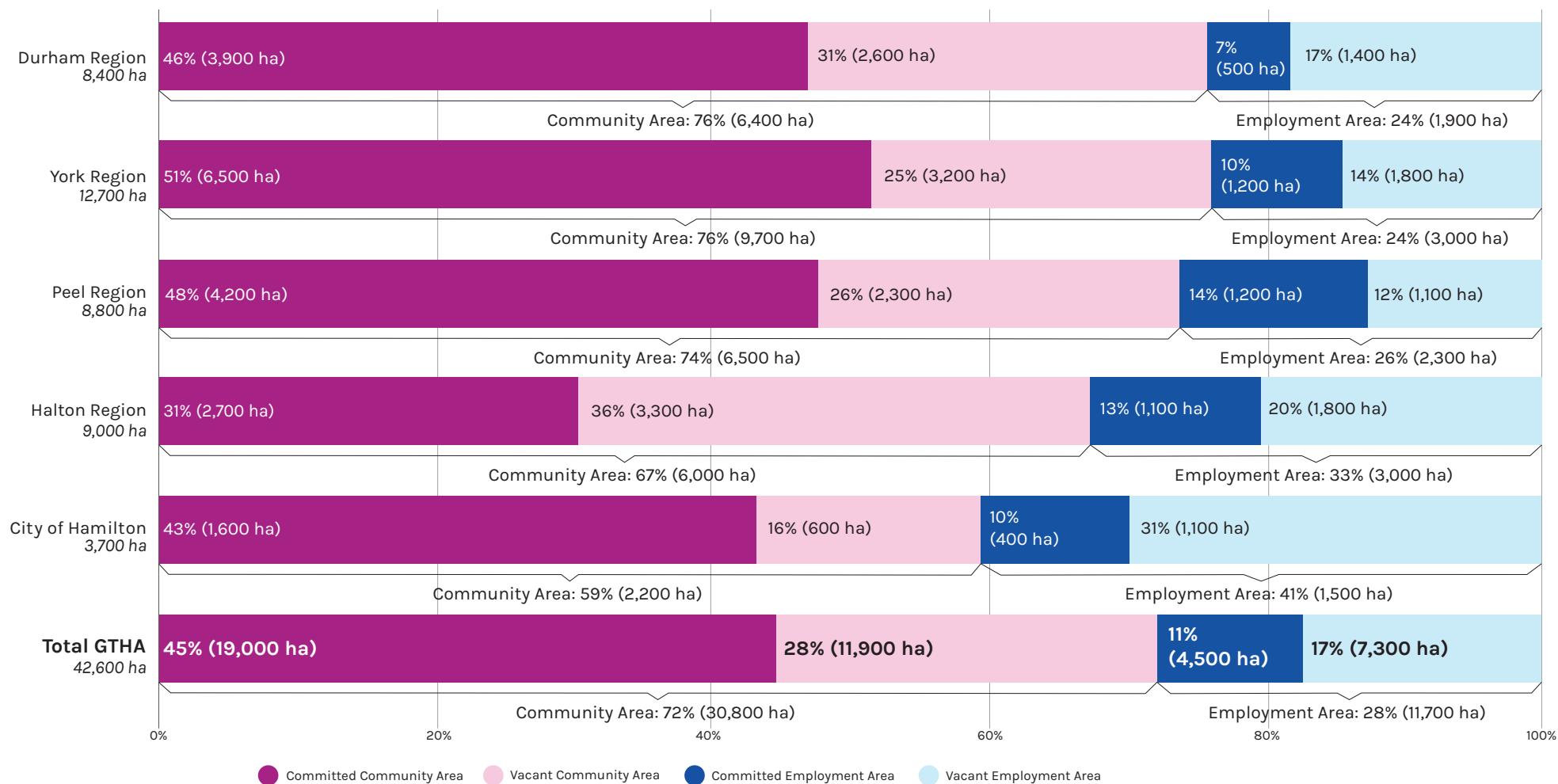
Designated Greenfield Areas - Land Supply Overview as of 2023

GTHA



Note: Totals may not add up due to rounding.

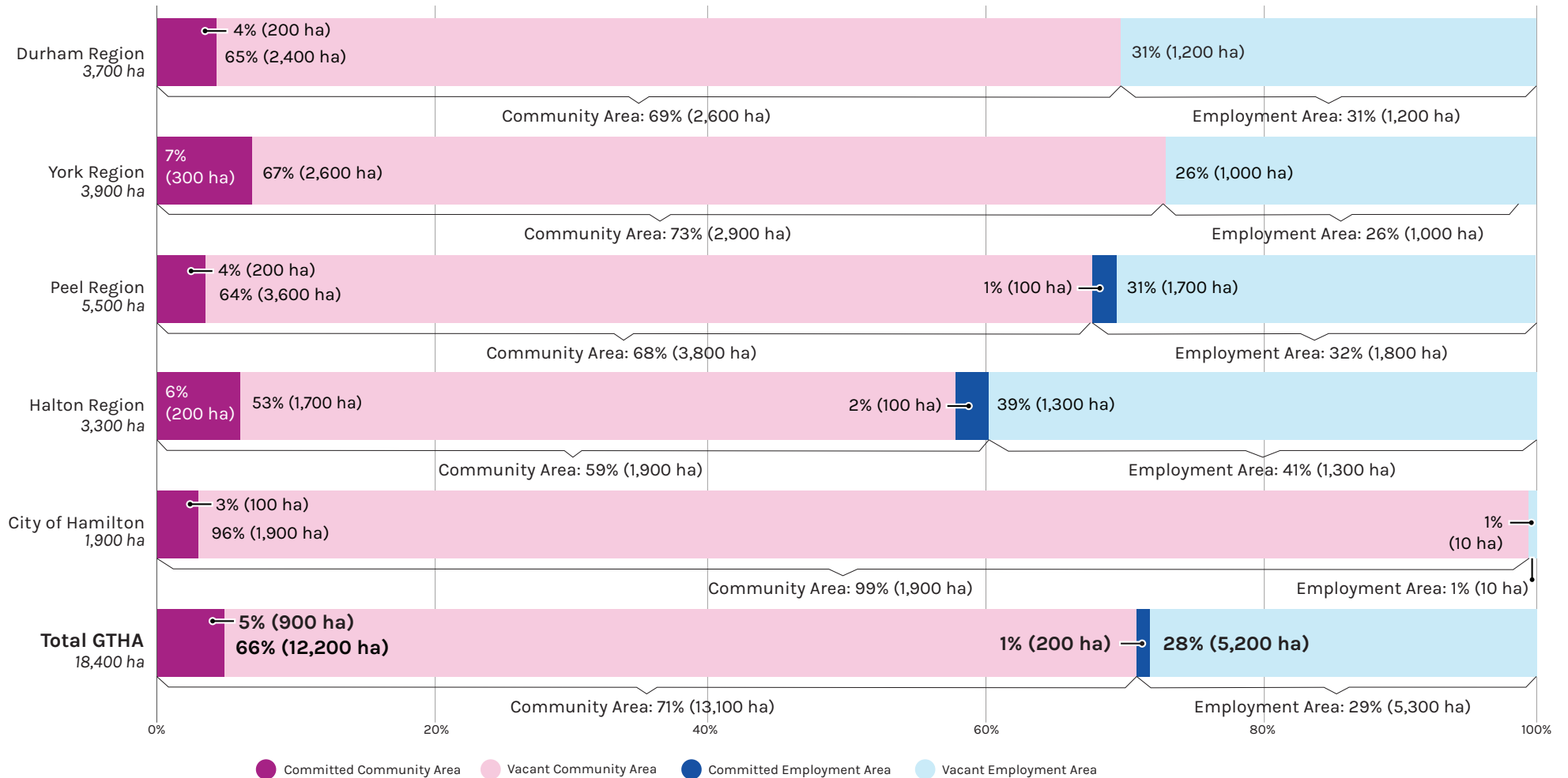
Designated Greenfield Areas - Land Supply Overview as of 2018



Note: Totals may not add up due to rounding.

Settlement Area Boundary Expansion Areas Post-2018

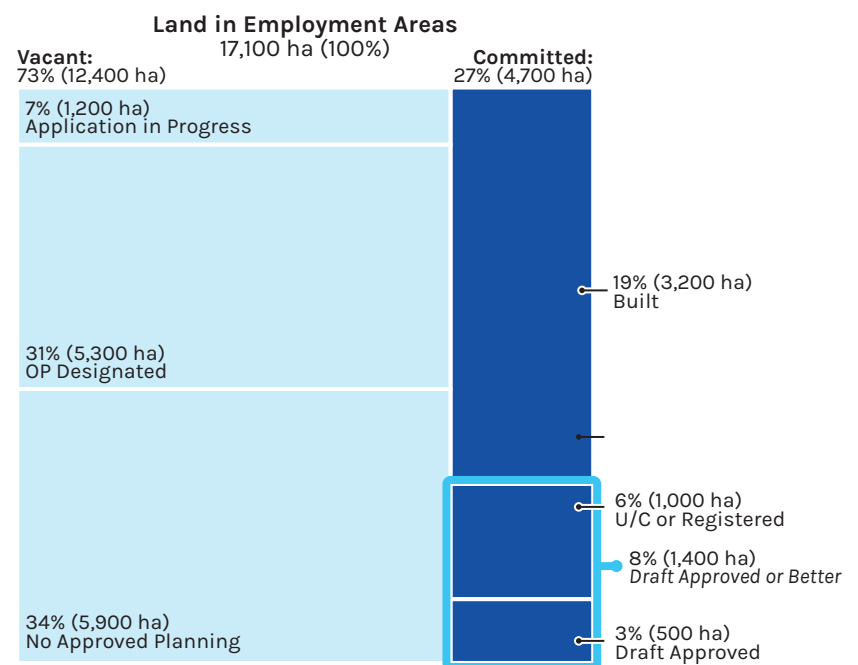
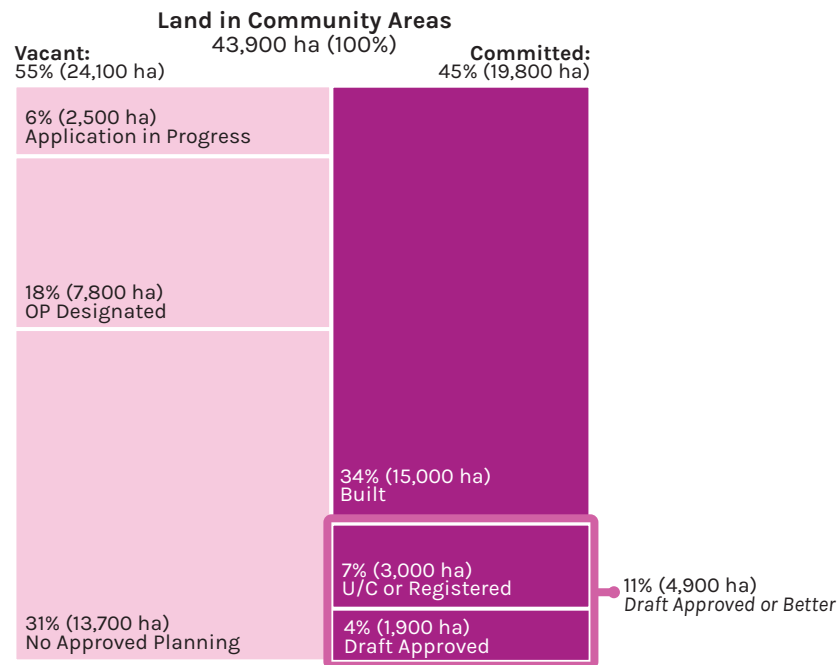
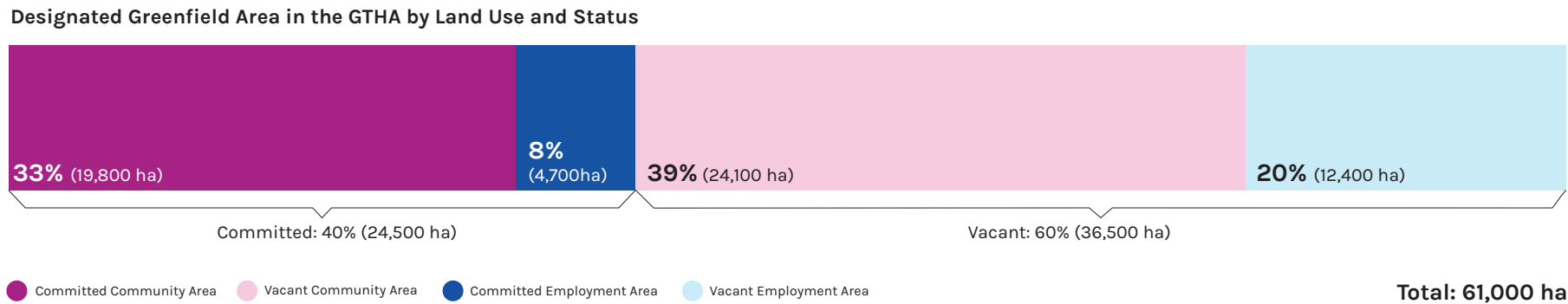
GTHA



Notes:

1. Settlement Area Boundary Expansion Areas based on approved Official Plans.
2. Durham Region assumed as approved for the purposes of this analysis.
3. Totals may not add up due to rounding.

Detailed Designated Greenfield Area Land Supply Breakdown

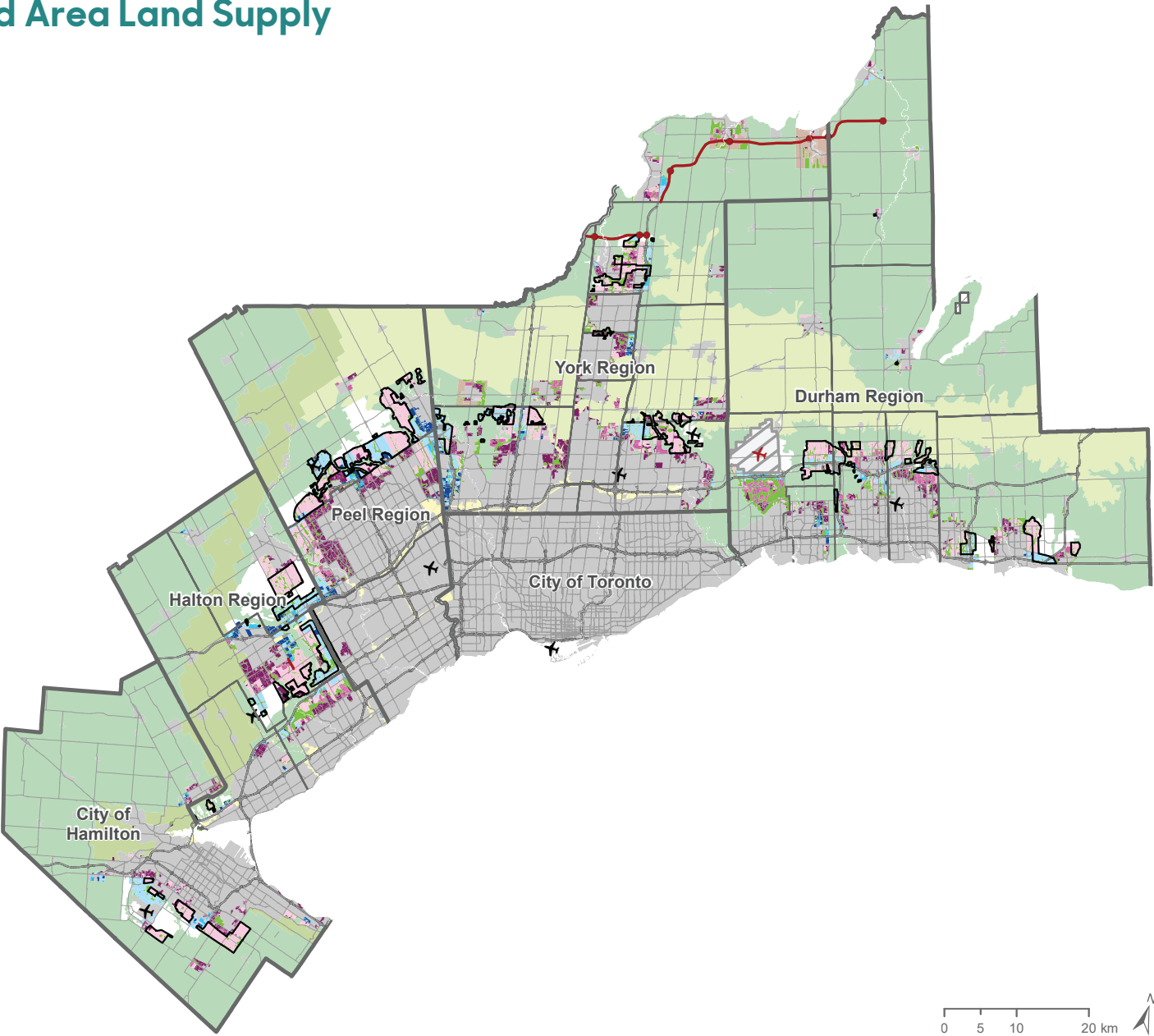


Note: Totals may not add up due to rounding.

Designated Greenfield Area Land Supply

GTHA

- Built-Up Area
- Airport
- Proposed Airport
- EA Approved Highway Route
- Transportation Corridor Under Study
- Provincial Plans**
 - Parkway Belt West Plan
 - Oak Ridges Moraine Conservation Plan
 - Niagara Escarpment Conservation Plan
 - Greenbelt Plan
- Designated Greenfield Areas**
 - Settlement Area
 - Boundary Expansion Area
 - Uses to be Determined
- Community Area**
 - Built
 - Draft Approved or Better
 - Vacant
- Employment Area**
 - Built
 - Draft Approved or Better
 - Vacant
- Non-Developable Area**
 - Environmental Feature / Cemetery
 - Major Infrastructure
 - Agricultural and Rural Area



Note: SABE Areas to 2051 are Provincially approved with the exception of Durham Region. Lands for Durham Region are adopted by the Region with approved lands still to be determined.

City of Toronto

Demographics

- 12% population growth occurred between 2006 and 2021 (291,075 people not adjusted for undercount).
- The amount of employment decreased by 2% between 2006 and 2021 (-28,430 jobs).
- The proportion of single- and semi-detached units within Toronto's housing mix has decreased from 35% in 2006 to 30% in 2021.
- 51% of the population lives in apartments which comprise 61% of the total occupied *Private Dwellings* in 2021.
- In 2021, *Housing Suitability* is worsening for households living in one-bedroom dwellings. 16% of one-bedroom dwellings (up from 15% in 2016) accommodate households that require additional bedrooms in order to be housed suitably. The *Housing Suitability* for two-bedroom dwellings remains steady at 16%.
- In 2021, 60% of all households were comprised of families, where 69% of households have two-bedrooms or more.

- Toronto accommodated 15% of Canada's national immigration between 2016 and 2021, where immigration was overwhelmingly comprised of younger immigrants, with 42% age 24 and under, and 47% between the ages of 25-44.
- In 2021, *Apartments or Flats in a Duplex* comprised 4% of the total units in Toronto and 2% of the total unit growth from 2006 to 2021. This is likely to continue to reflect the potential for additional units from secondary and tertiary suites as a component of growth moving forward to 2051.

Growth Forecasts and Land Needs

- Based on the 2020 Growth Plan, Toronto is forecast to accommodate 33% of the population (3,650,000 people) and 37% of the employment (1,980,000 jobs) within the *GTHA* by 2051.
- 22% of the population growth (579,000 people), 28% of the household unit growth (282,500 units), and 16% of the employment growth (191,000 jobs) within the 2006-2031 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within the Toronto.
- Beyond the original 2031 forecast, 21% of the population growth (460,000 people), 30% of the household unit growth (281,900 units), and 33% of the employment growth (320,000 jobs) within the 2031-2051 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within the Toronto.

- As of 2021, Toronto has a housing surplus of 39,200 *Grade-Related Housing* units and a shortfall of 23,300 apartment units based on the original forecasts of the Growth Plan.
- Toronto's 2021-2051 housing forecast for apartment unit growth is 86% of overall units growth or 399,200 units. This is higher than the Province's (through Hemson) forecasted apartment unit growth for Toronto (303,600 units). From 2006 to 2021, the apartment unit growth was 90% of total unit growth (162,200 units).
- Based on Toronto's LNA, the projected surplus of *Grade-Related Housing* units will be 20,000 units to the year 2051.

Land Supply

- Toronto has no *DGA*, therefore all growth will occur through intensification.
- Approximately 70% of land within Toronto's Community Area is within a *Low-Density* designation (commonly referred to as the '*Yellowbelt*').

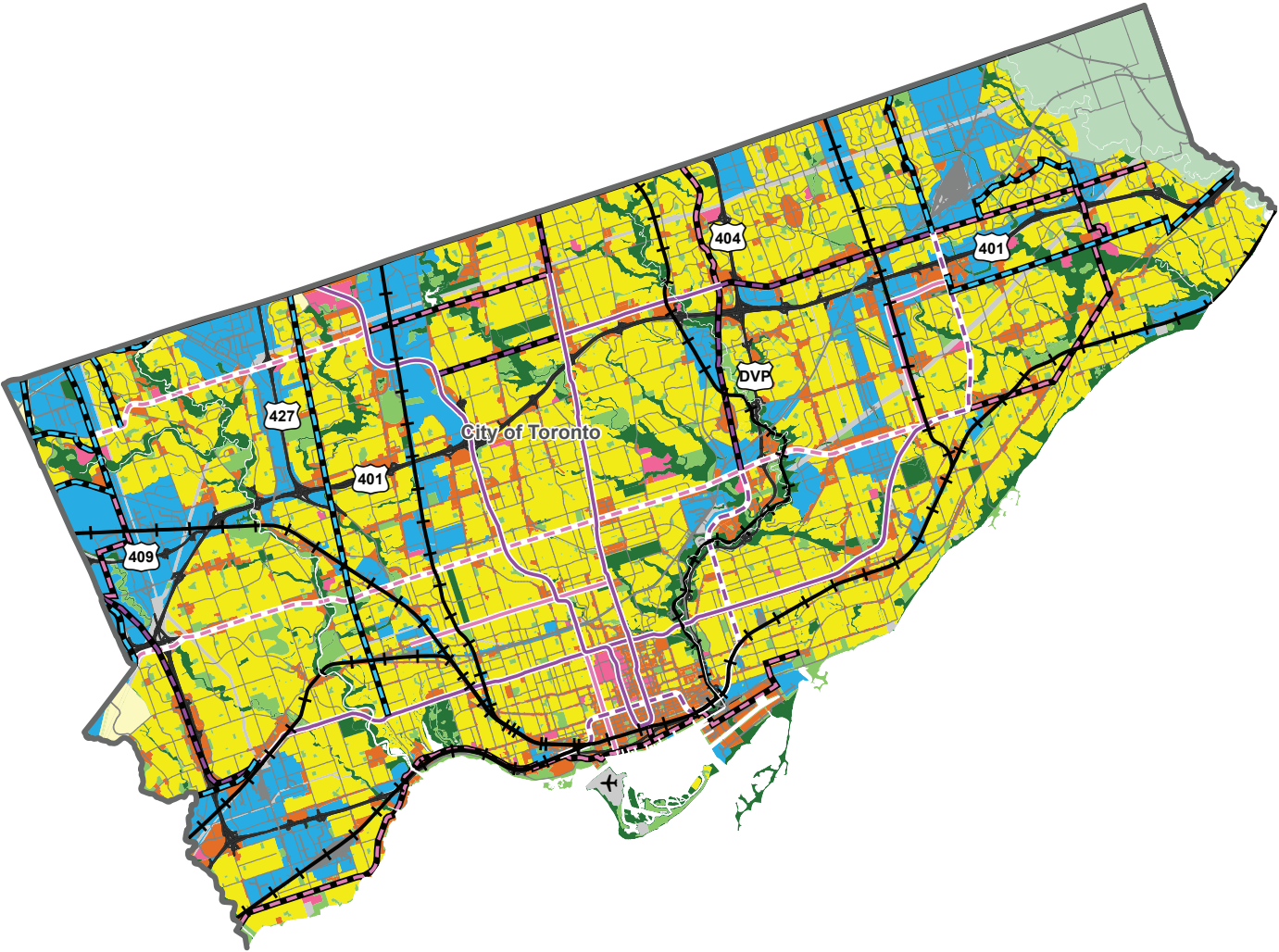
Generalized Official Plan Land Use Designations

Generalized Land Use Designations

- Estate Residential
- Low Density Residential
- Medium Density Residential
- High Density Residential
- General Commercial
- Retail Commercial
- General Employment
- Prestige Employment
- Mixed Use Residential
- Mixed Use Employment
- Institutional
- Recreation-Park
- Environmental
- Major Highway/Utility

Transit Routes

- Existing GO Train Line
- Proposed GO Train Line
- Existing LRT
- LRT Under Construction
- Proposed LRT
- Existing Subway
- Subway Under Construction
- Proposed Subway
- Existing BRT
- Proposed BRT



Note: Generalized land use designations for illustrative purposes only.

Settlement Area Population and Employment Density

TORONTO

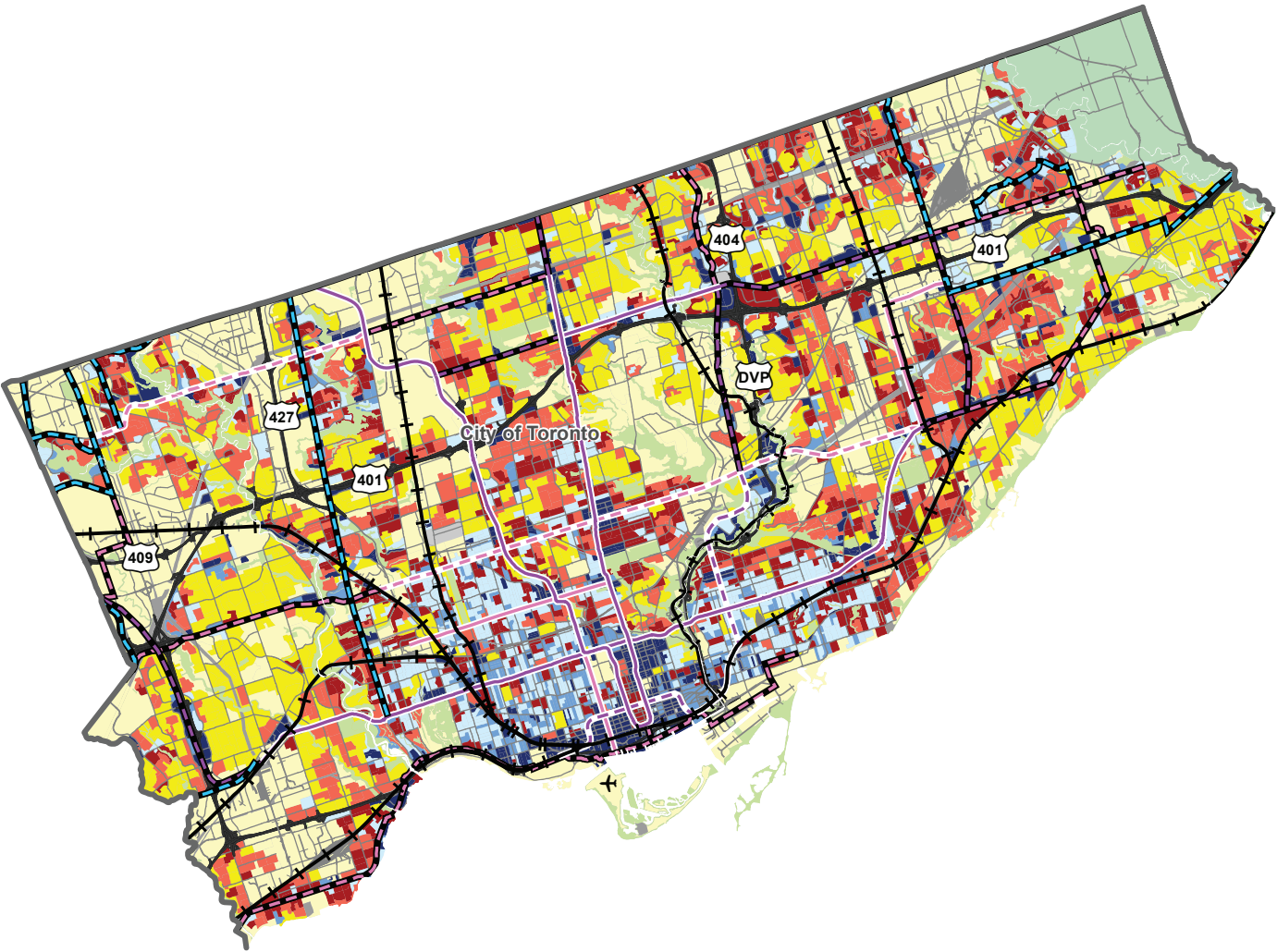
Density
(People & Jobs/ha)

- < 30
- 30 - 49.9
- 50 - 69.9
- 70 - 99.9
- 100 - 149.9
- 150 - 199.9
- 200+
- N/A

Transit Routes

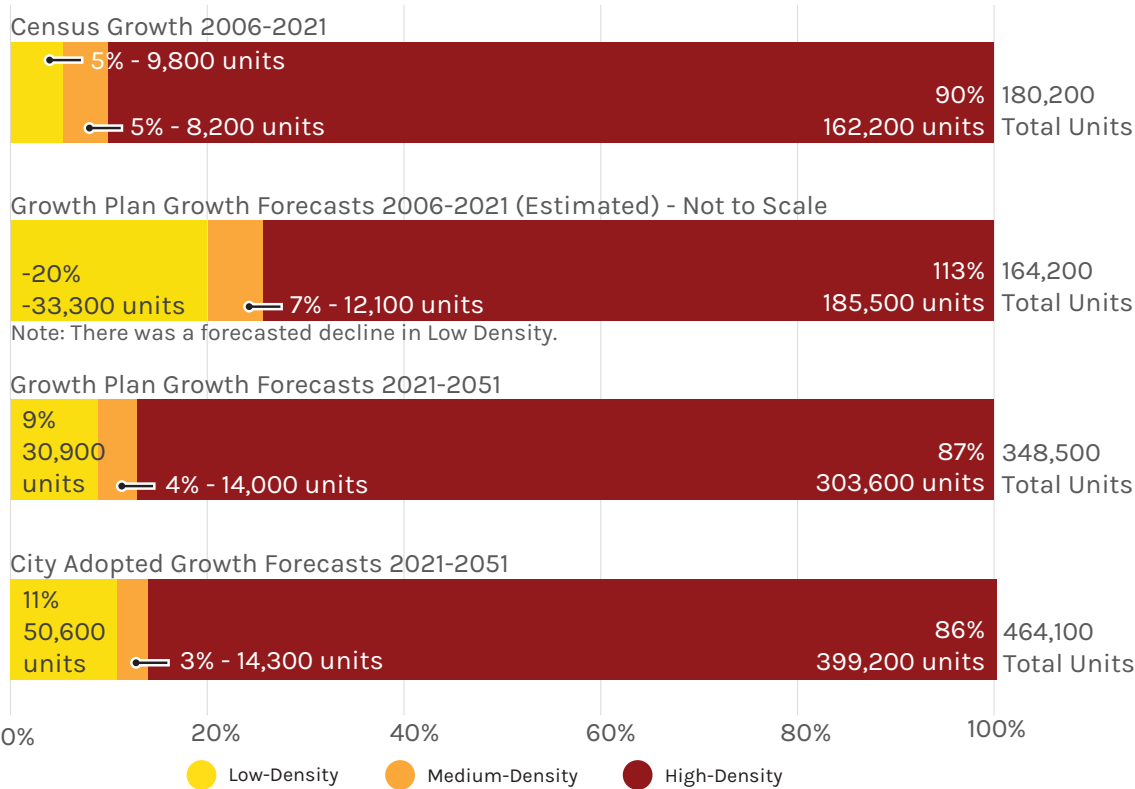
- Existing GO Train Line
- Proposed GO Train Line
- Existing LRT
- LRT Under Construction
- Proposed LRT
- Existing Subway
- Subway Under Construction
- Proposed Subway
- Existing BRT
- Proposed BRT

Note: Density by Census Dissemination Area



Unit Growth/Forecasts and Land Needs Assessment Comparisons

City of Toronto Unit Growth/Forecasts



Comparisons

Census Growth vs. Growth Plan Growth Forecasts 2006-2021	
Shortfall (-) / Surplus (+)	
Low-Density	+43,100
Medium-Density	-3,900
High-Density	-23,300
Total Units	+15,900

Adopted LNA vs. Growth Plan Growth Forecasts 2021-2051	
Shortfall (-) / Surplus (+)	
Low-Density	+19,700
Medium-Density	+300
High-Density	+95,600
Total Units	+115,600

Notes:

- Adopted Official Plan unit growth forecasts based on the Land Needs Assessment scenario that supported the adopted Official Plan.
- City of Toronto's "Our Toronto Plan: Land Needs Assessment" dated June 2022, assumed as adopted.
- Values rounded to nearest 100.
- Totals may not add up due to rounding.
- See Appendix for full set of notes.

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Durham Region

Demographics

- 24% population growth occurred between 2006 and 2021 (135,734 people not adjusted for undercount).
- 69% employment growth occurred between 2006 and 2021 (130,440 jobs).
- The proportion of single- and semi-detached units within Durham Region's housing mix has decreased from 74% in 2006 to 72% in 2021.
- Durham Region's main housing type is predominantly *Grade-Related*, where only 8% of the population lives in apartments which comprise 13% of the total occupied *Private Dwellings* in 2021.
- In 2021, *Housing Suitability* is worsening for households living in one- and two-bedroom dwellings. 9% of one-bedroom dwellings (up from 6% in 2016) and 8% of two-bedroom dwellings (up from 6% in 2016) accommodate households that require additional bedrooms in order to be housed suitably.
- In 2021, 77% of all households were comprised of families, where 92% of households have two-bedrooms or more.
- Durham Region accommodated 1% of Canada's national immigration between 2016 and 2021, where immigration to Durham Region was overwhelmingly comprised of younger immigrants, with 51% age 24 and under, and 41% between the ages of 25-44.

- In 2021, *Apartments or Flats in a Duplex* comprised 4% of the total units in Durham Region and 5% of the total unit growth from 2006 to 2021. This is likely to continue to reflect the potential for additional units from secondary and tertiary suites as a component of growth moving forward to 2051.

Growth Forecasts and Land Needs

- Based on the 2020 Growth Plan, Durham Region is forecast to accommodate 12% of the population (1,300,000 people) and 9% of the employment (460,000 jobs) within the *GTHA* by 2051.
- 14% of the population growth (386,000 people), 14% of the household unit growth (142,000 units), and 12% of employment growth (149,000 jobs) within the 2006-2031 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within Durham Region.
- Beyond the original 2031 forecast, 15% of the population growth (330,000 people), 13% of the household unit growth (125,000 units), and 10% of the employment growth (100,000 jobs) within the 2031-2051 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within Durham Region.
- As of 2021, Durham Region has a housing shortfall of 13,200 *Grade-Related Housing* units and 7,300 apartment units based on the original forecasts of the Growth Plan.

- Durham Region's 2021-2051 housing forecast for apartments (29% and 59,900 units) is higher than the Province's (through Hemson) forecasted apartment growth (19% and 41,800 units) and is aspirational when compared to the 13% share of apartment growth (6,200 units) from 2006 to 2021.
- Based on the adopted Official Plan, the projected shortfall of *Grade-Related Housing* units in Durham Region will be 23,100 units to the year 2051, equating to a land shortfall of approximately 1,200 ha. If this shortfall were provided for in the *BUA* of Durham Region, it would require 9% of existing neighbourhoods to be re-developed.

Land Supply

- 21% of the total *DGA* in Durham Region has been *Built*, of which 26% of the *Community Area DGA* and 7% of the *Employment Area DGA* have been *Built*.
- Approximately 70% of land within the *Community Area* (including both the *BUA* and *DGA*) is within a *Low-Density* designation (commonly referred to as the 'Yellowbelt').
- 14% of *Community Area DGA* and 15% of *Employment Area DGA* in Durham Region was consumed from 2018-2023.
- Within Durham Region, the City of Oshawa has the largest supply of *Committed DGA* (940 hectares), and the Town of Clarington has the largest supply of *Vacant DGA* (1,620 hectares).
- The *Settlement Area Boundary Expansion Area* that is to accommodate growth from 2031-2051 represents a 10% increase of Durham Region's *Settlement Area*, compared to a 34% population increase.
- There is 2,400 ha of *Whitebelt* land remaining to accommodate growth in Durham Region outside of Provincial Plan areas.

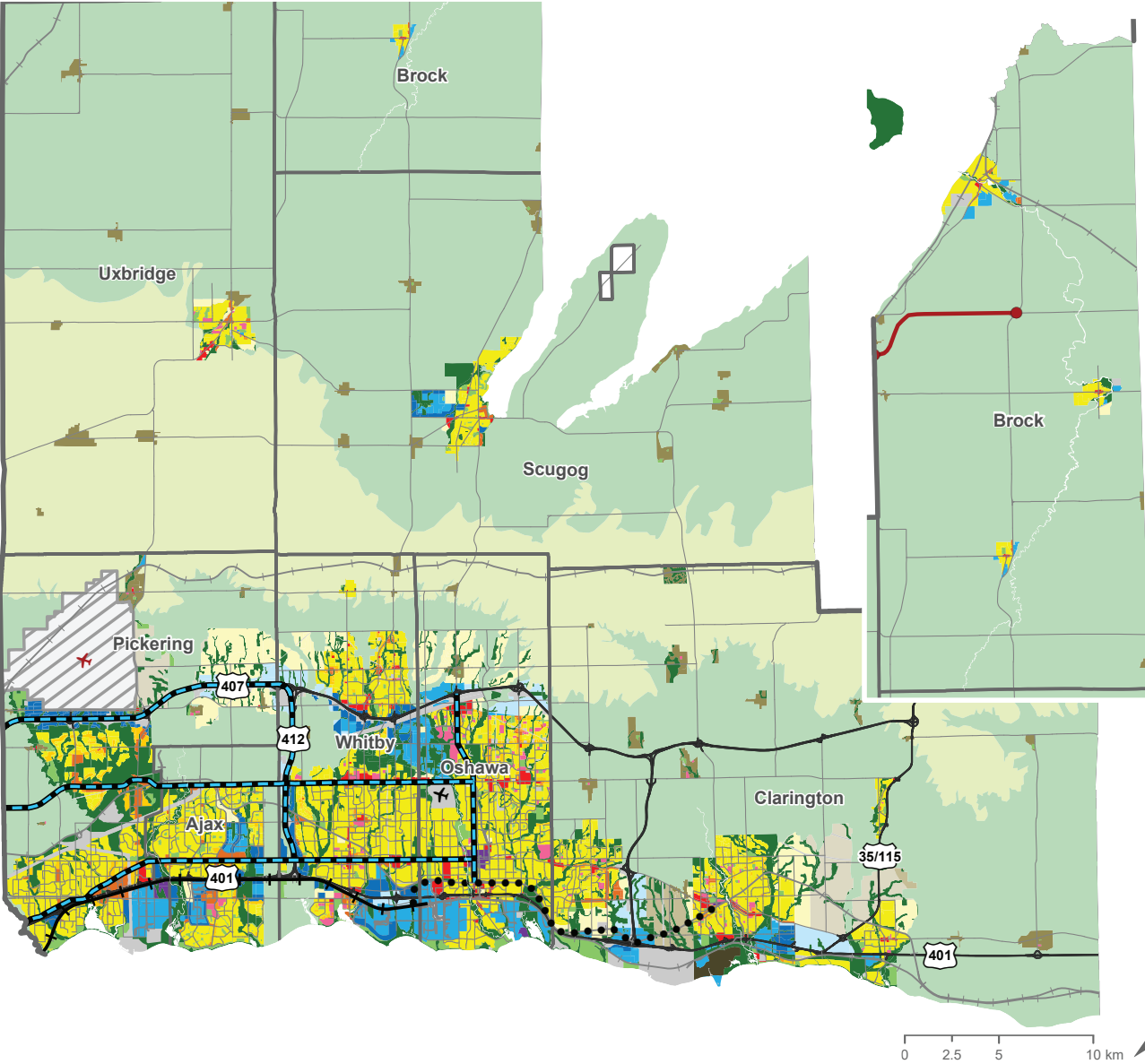
Generalized Official Plan Land Use Designations

Generalized Land Use Designations

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- Medium Density Residential
- High Density Residential
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- Extraction Area
- Agricultural
- Rural
- Rural Settlement
- Study Area

Transit Routes

- Existing GO Train Line
- Proposed GO Train Line
- Proposed BRT



Note: Generalized land use designations for illustrative purposes only.

Settlement Area Population and Employment Density

DURHAM

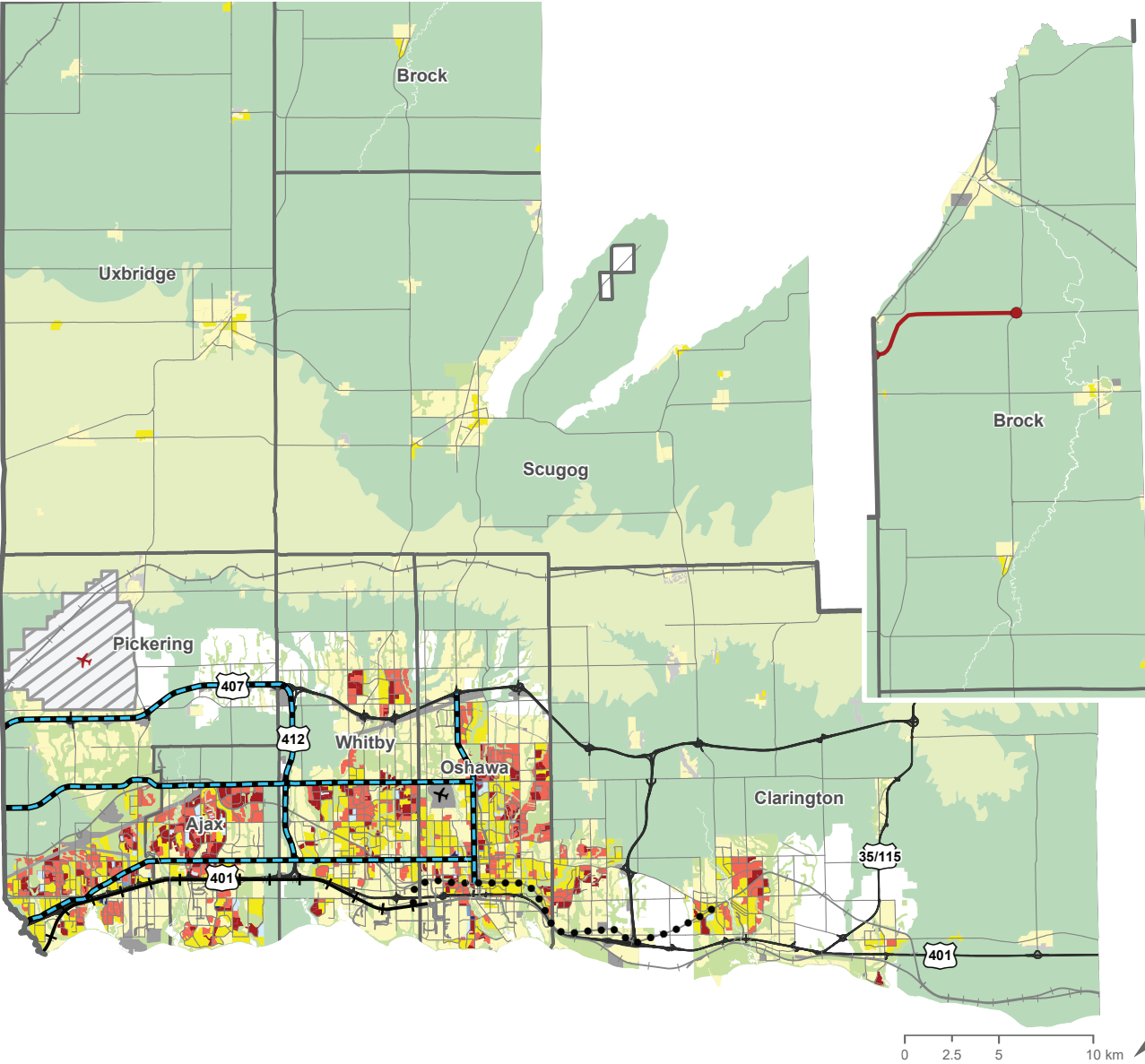
Density
(People & Jobs/ha)

- < 30
- 30 - 49.9
- 50 - 69.9
- 70 - 99.9
- 100 - 149.9
- 150 - 199.9
- 200+
- N/A

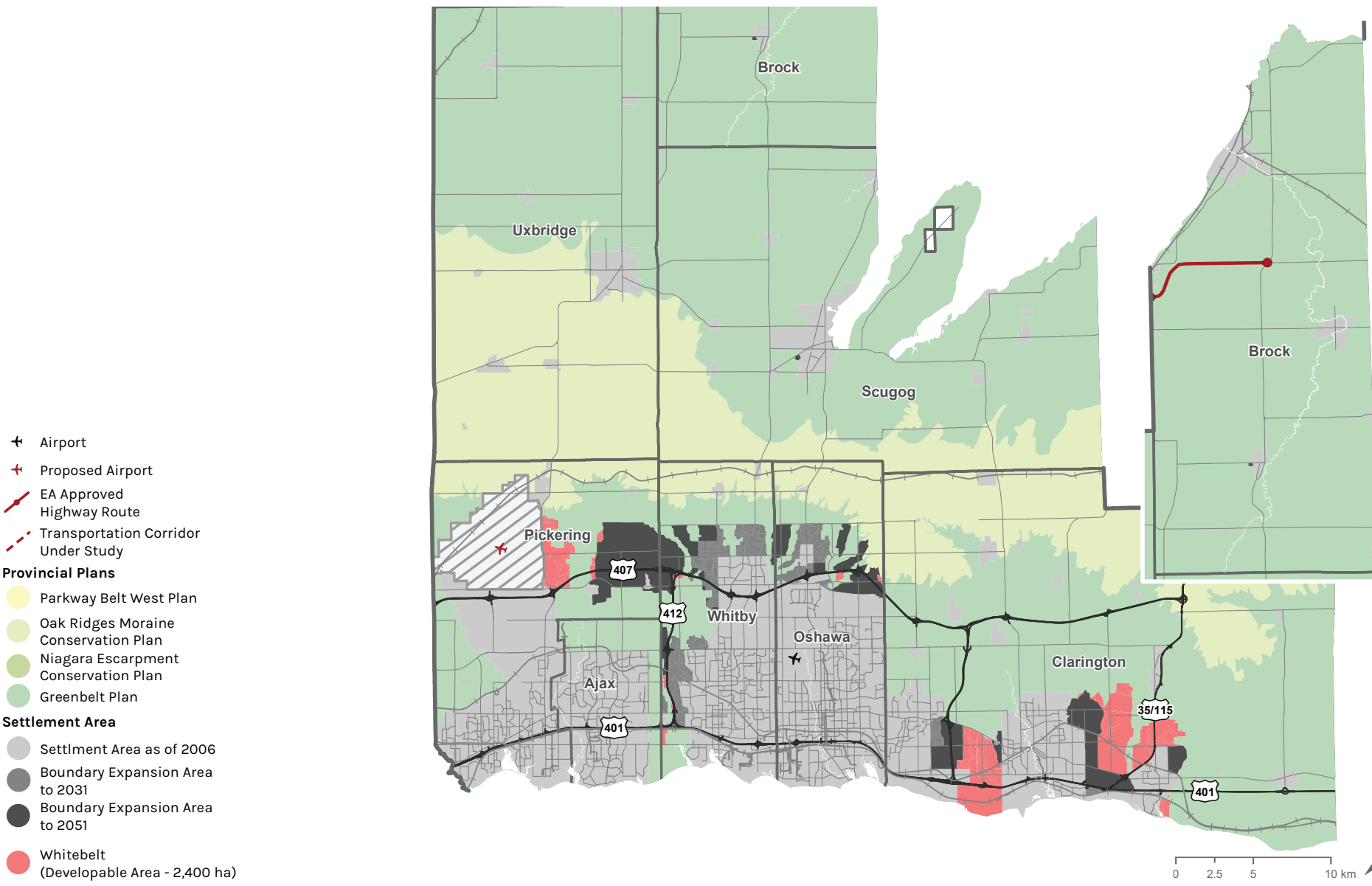
Transit Routes

- Existing GO Train Line
- Proposed GO Train Line
- Proposed BRT

Note: Density by Census Dissemination Area



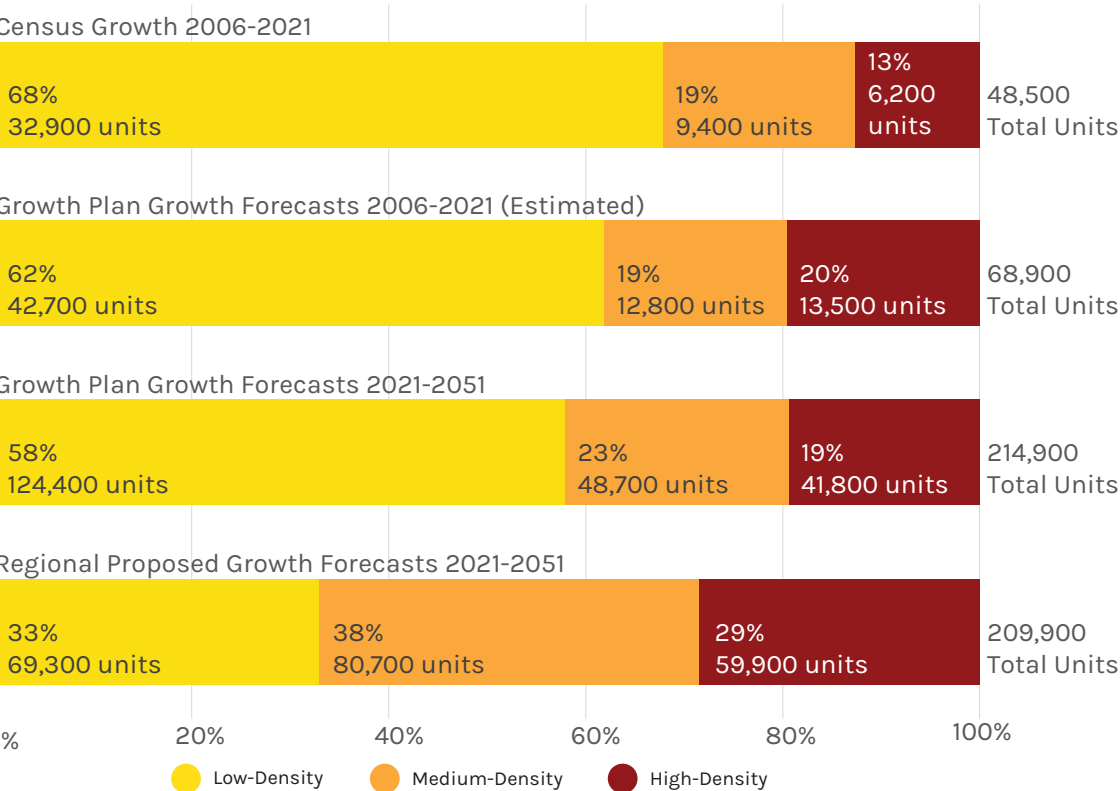
Settlement Area Boundary Expansion Areas and Remaining Whitebelt



Note: SABE Areas to 2051 are Provincially approved with the exception of Durham Region. Lands for Durham Region are adopted by the Region with approved lands still to be determined.

Growth Forecasts and Land Needs Assessment Comparisons

Durham Region Unit Growth/Forecasts



- Notes:
1. Adopted Official Plan unit growth forecasts based on the Land Needs Assessment scenario that supported the adopted Official Plan.
 2. Values rounded to nearest 100.
 3. Totals may not add up due to rounding.
 4. See Appendix for full set of notes.

Comparisons

Census Growth vs. Growth Plan
Growth Forecasts 2006-2021

Shortfall (-) / Surplus (+)	
Low-Density	-9,800
Medium-Density	-3,400
High-Density	-7,300
Total Units	-20,500

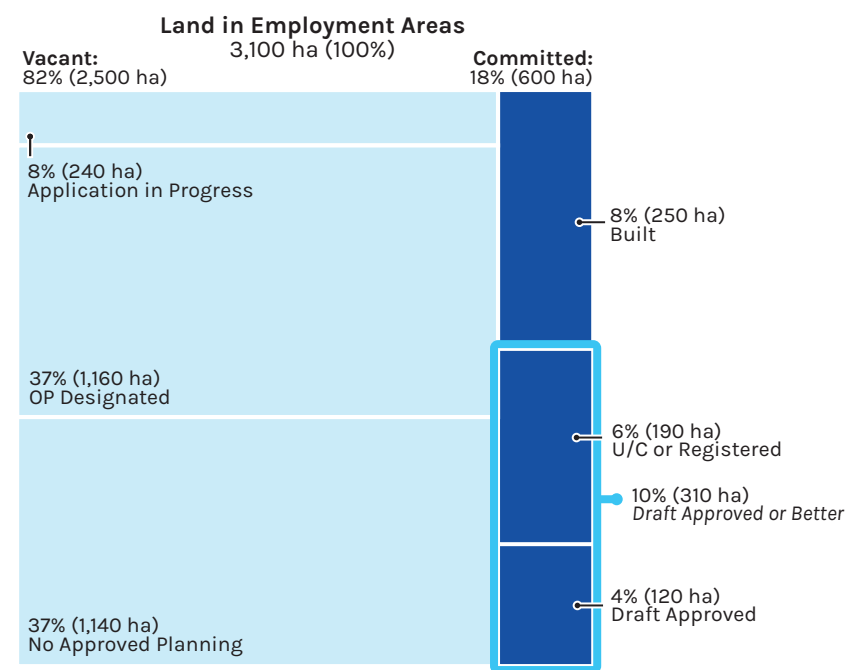
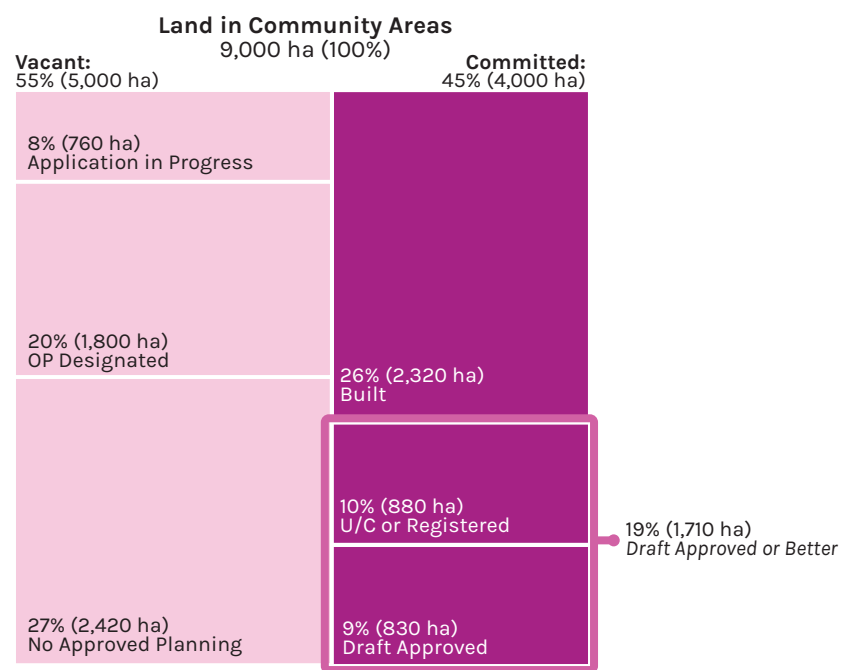
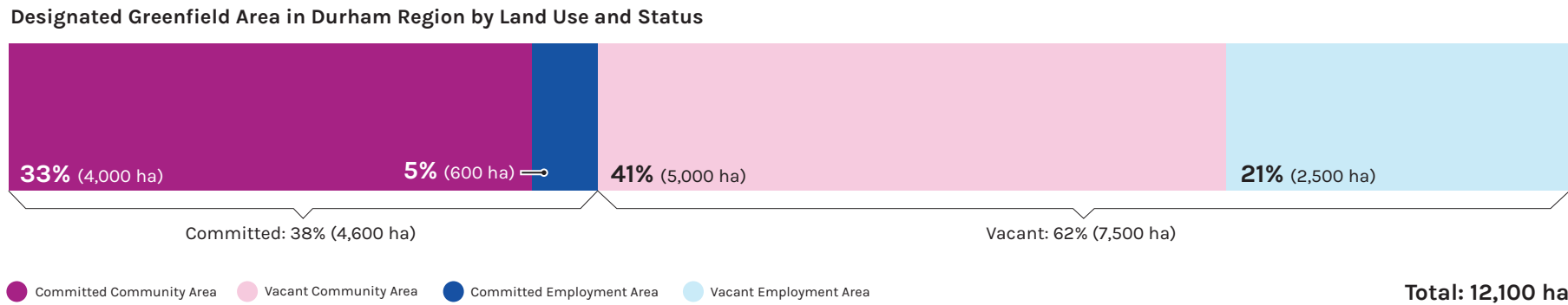
Adopted Official Plan vs. Growth Plan
Growth Forecasts 2021-2051

Shortfall (-) / Surplus (+)	
Low-Density	-55,100
Medium-Density	+32,000
High-Density	+18,100
Total Units	-5,000

Regionally Adopted OP vs. Provincially Approved OP
Settlement Area Boundary Expansion Area

	Regionally Adopted	Provincially Approved
Community Area (ha)	2,500	TBD
Employment Area (ha)	1,200	TBD
Total SABE Area (ha)	3,700	TBD

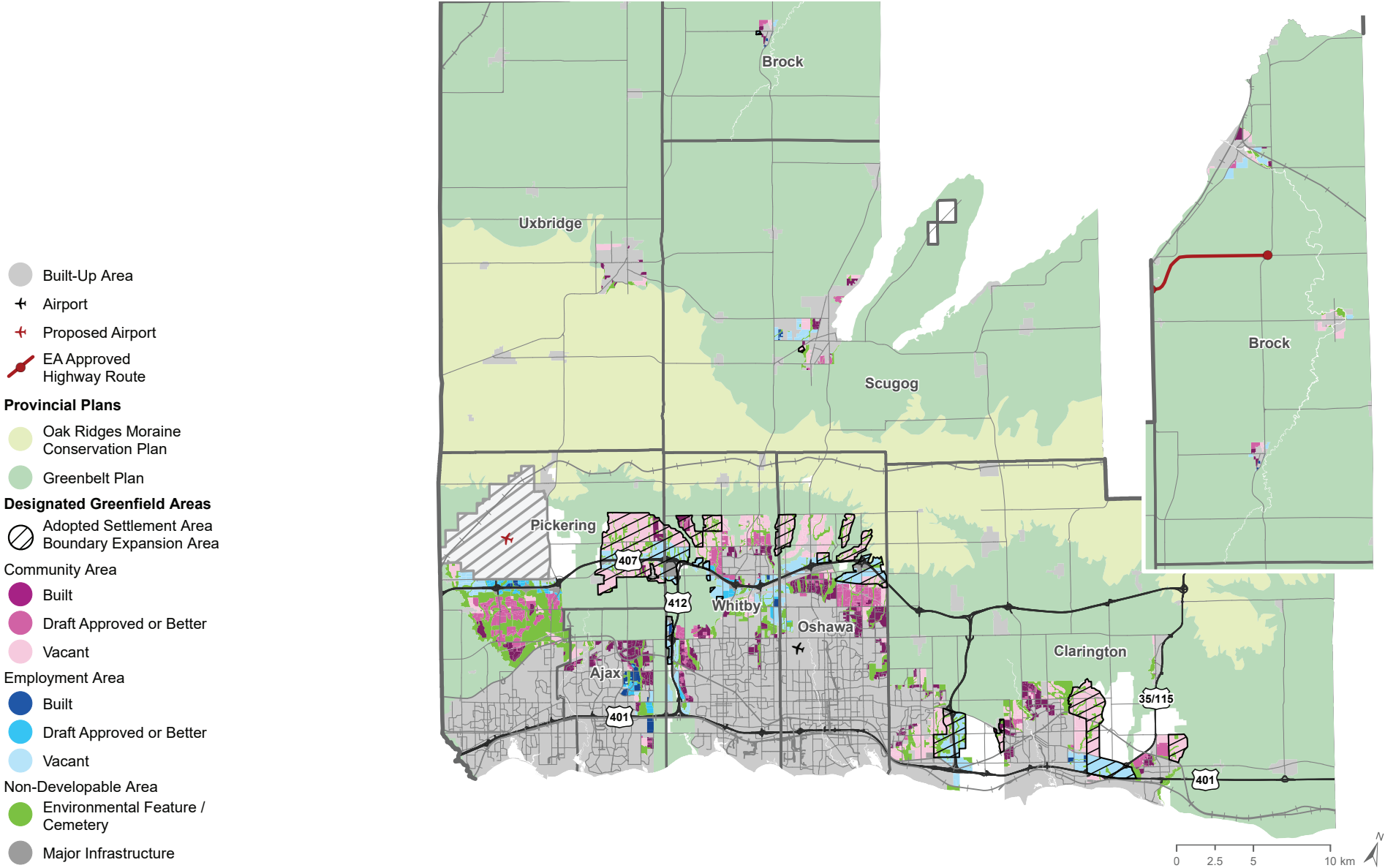
Detailed Designated Greenfield Area Land Supply Breakdown



Note: Totals may not add up due to rounding.

Designated Greenfield Area Land Supply

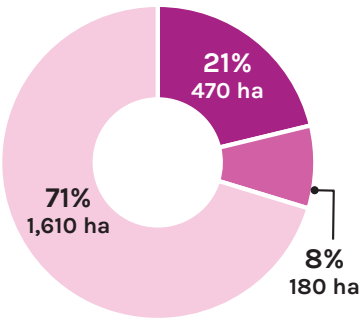
DURHAM



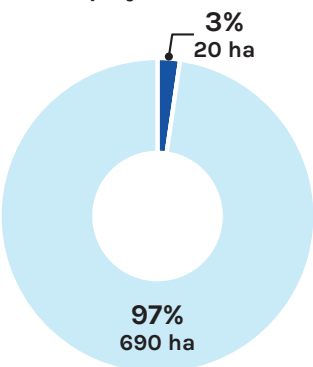
Note: Adopted Settlement Area Boundary Expansion Areas based on Durham Region Adopted Official Plan, May 2023. Provincial approval pending.

Town of Clarington

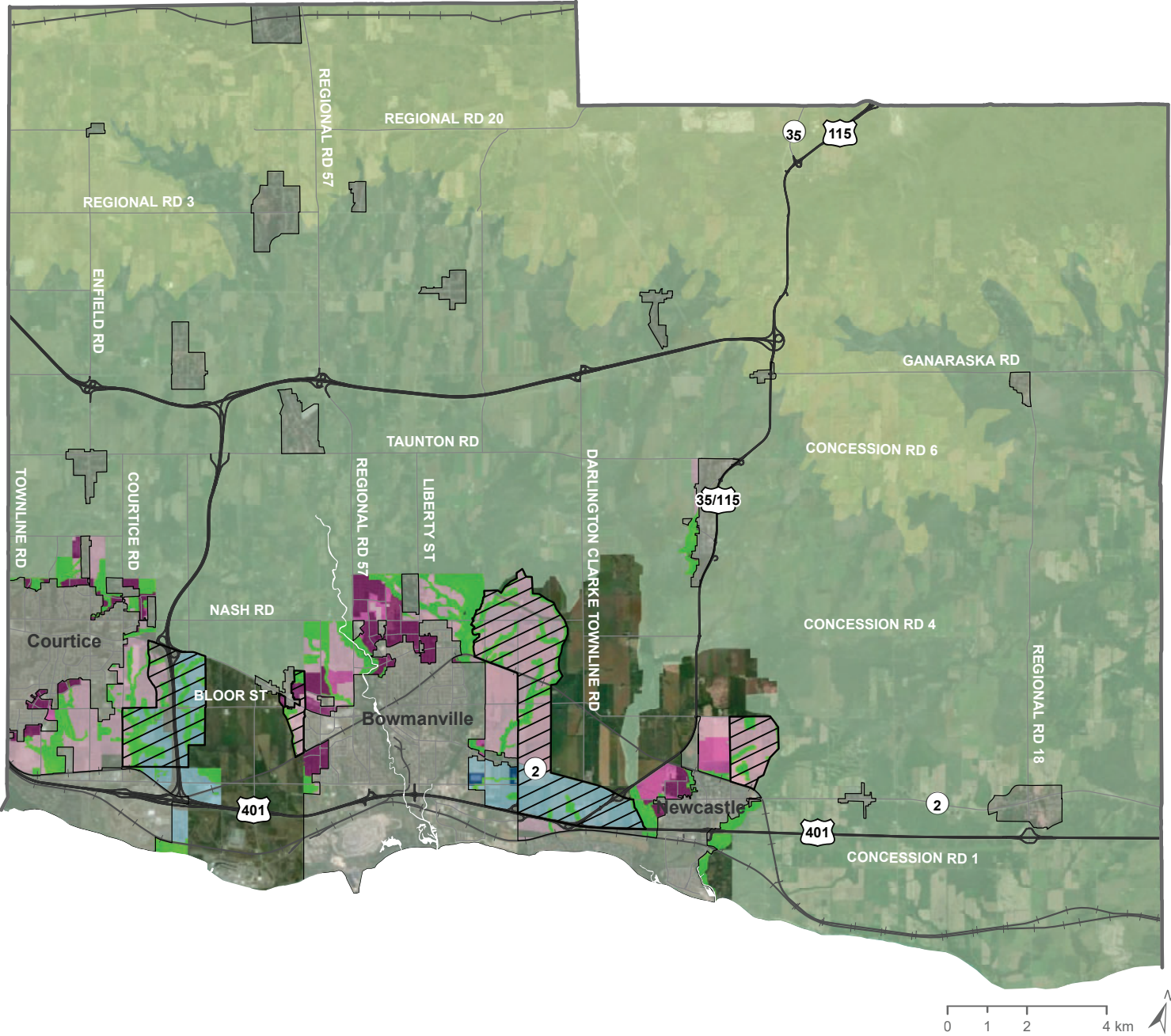
Community Area



Employment Area



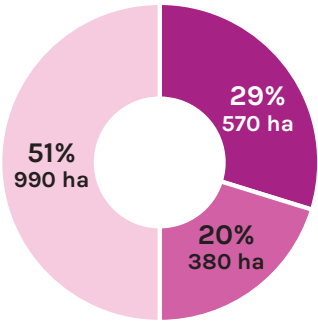
- Built
- Draft Approved or Better
- Vacant
- Adopted Settlement Area Boundary Expansion Area



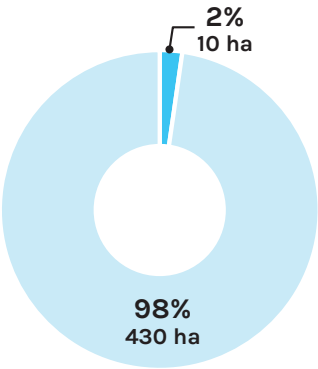
Note: Adopted Settlement Area Boundary Expansion Areas based on Durham Region Adopted Official Plan, May 2023. Provincial approval pending.

City of Oshawa

Community Area



Employment Area



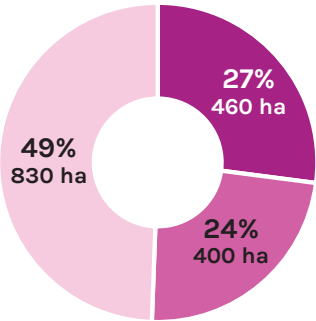
- Built
- Draft Approved or Better
- Vacant
- Adopted Settlement Area Boundary Expansion Area

Note: Adopted Settlement Area Boundary Expansion Areas based on Durham Region Adopted Official Plan, May 2023 Provincial approval pending.

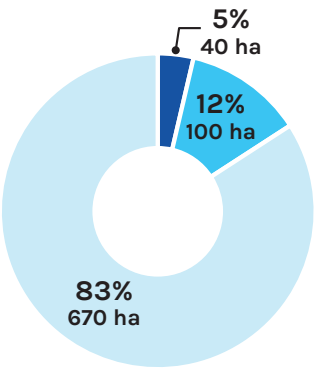


Town of Whitby

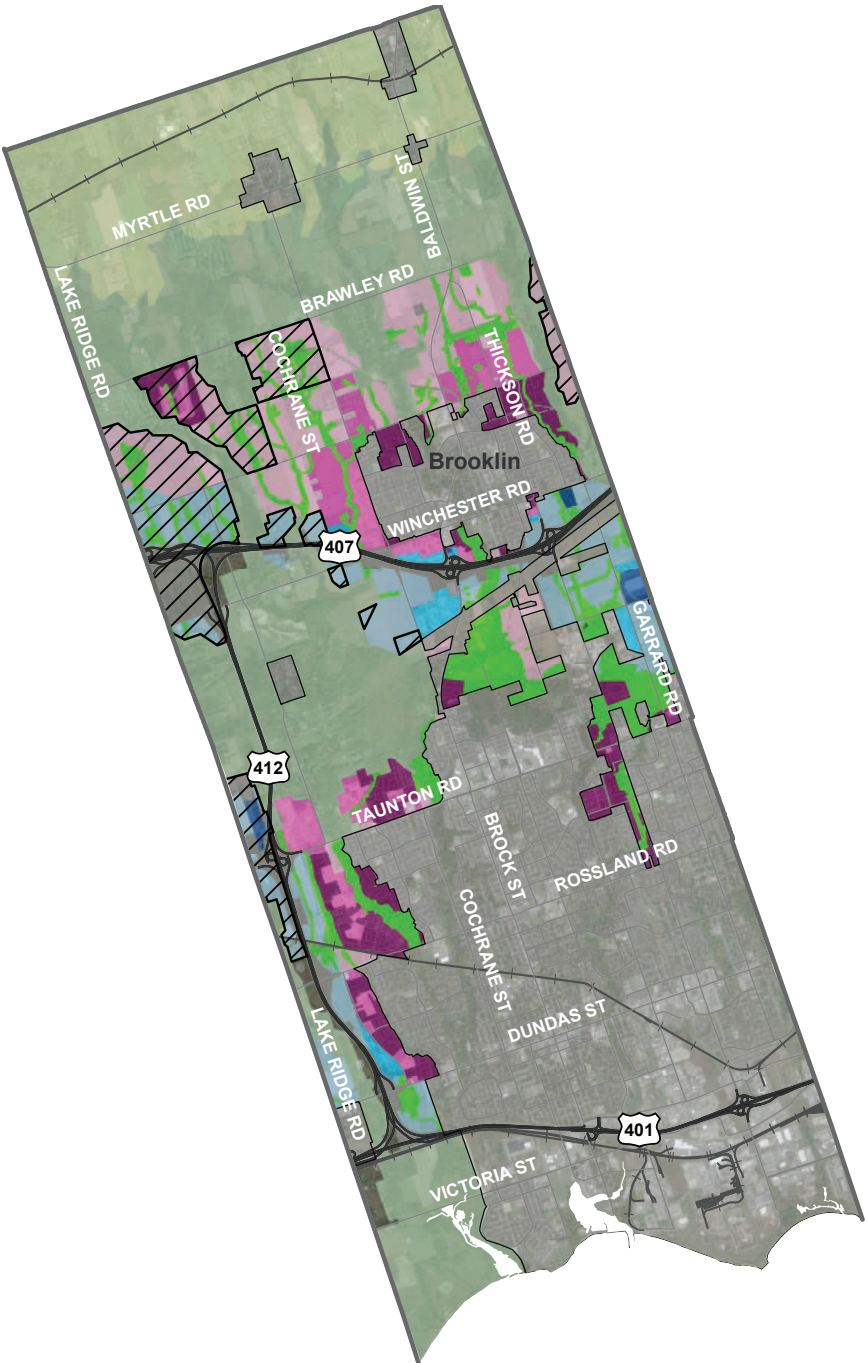
Community Area



Employment Area



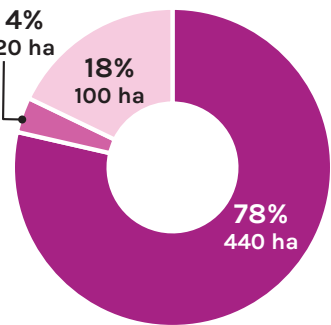
- Built
- Draft Approved or Better
- Vacant
- Adopted Settlement Area Boundary Expansion Area



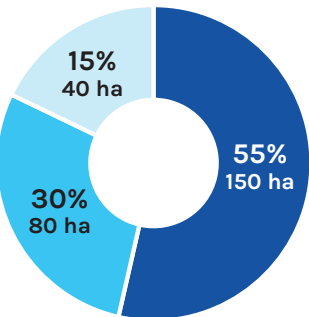
Note: Adopted Settlement Area Boundary Expansion Areas based on Durham Region Adopted Official Plan, May 2023. Provincial approval pending.

Town of Ajax

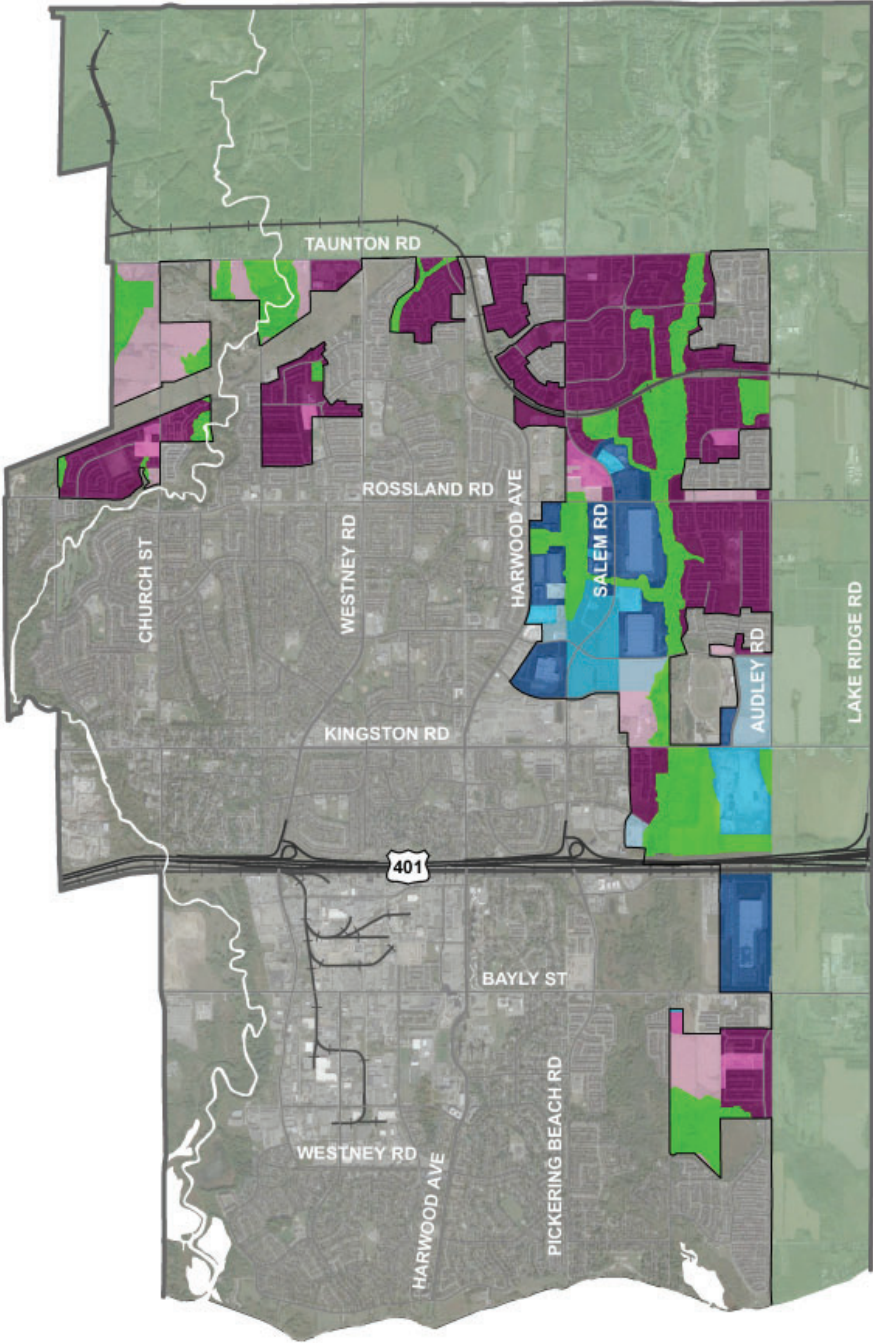
Community Area



Employment Area

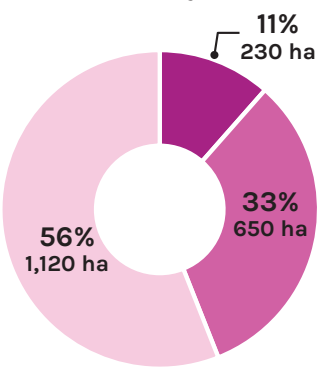


- Built
- Draft Approved or Better
- Vacant

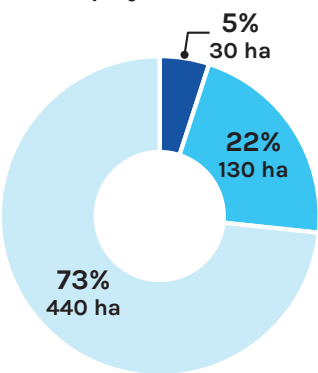


City of Pickering

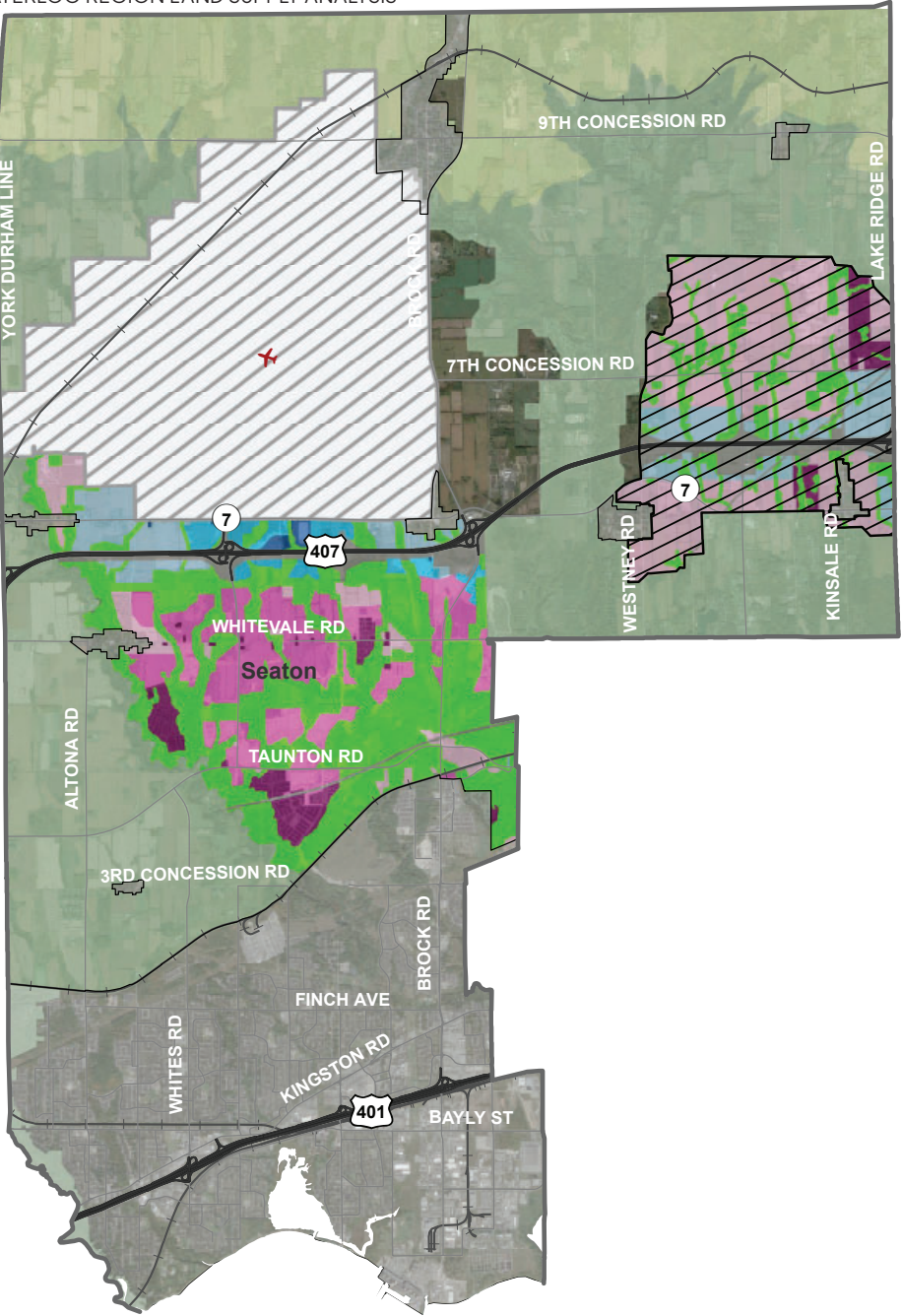
Community Area



Employment Area



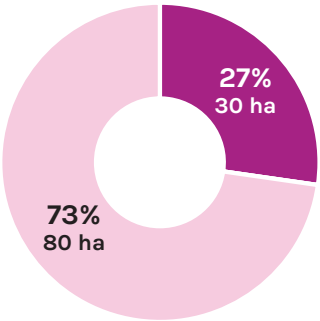
- Built
- Draft Approved or Better
- Vacant
- Adopted Settlement Area Boundary Expansion Area



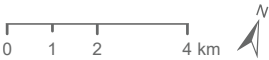
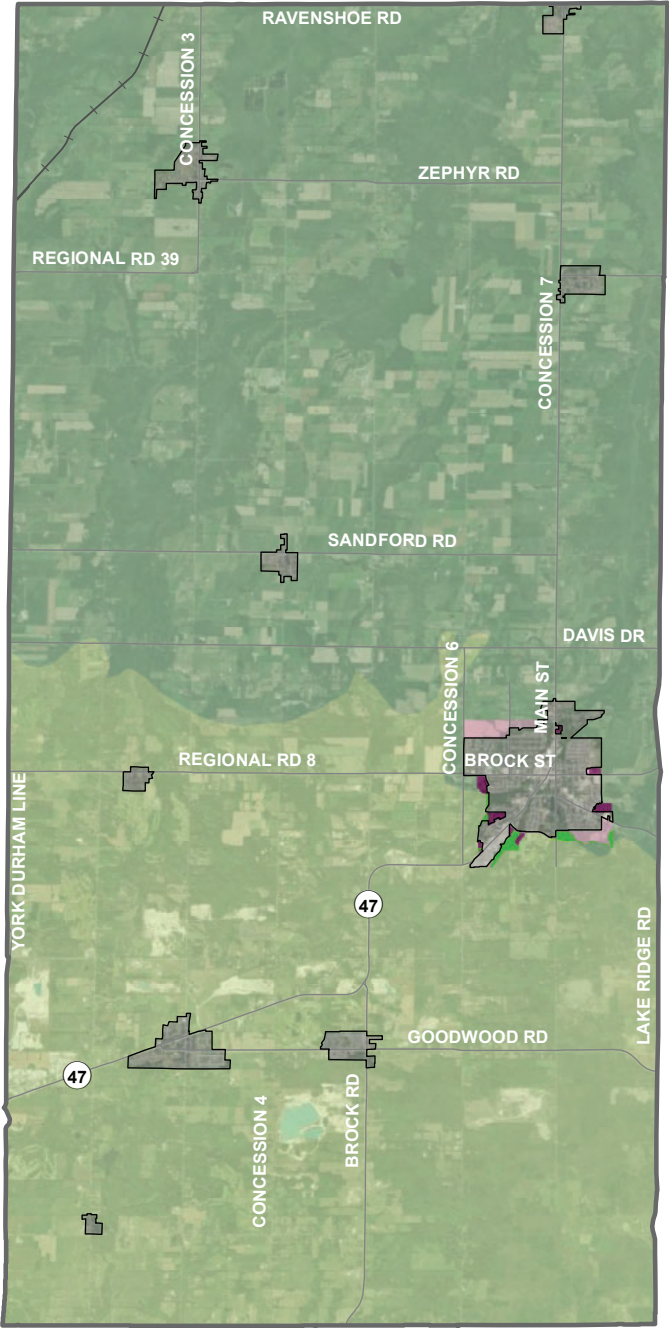
Note: Adopted Settlement Area Boundary Expansion Areas based on Durham Region Adopted Official Plan, May 2023. Provincial approval pending.

Township of Uxbridge

Community Area

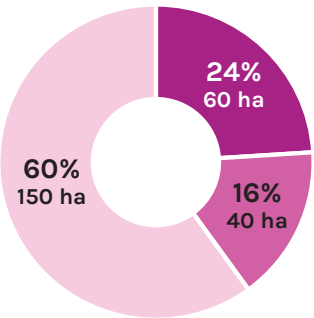


Employment Area

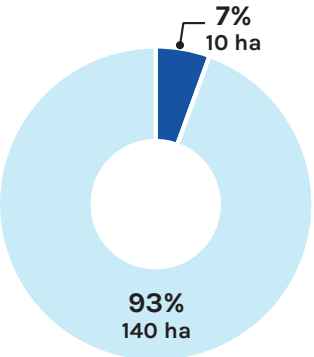


Township of Brock

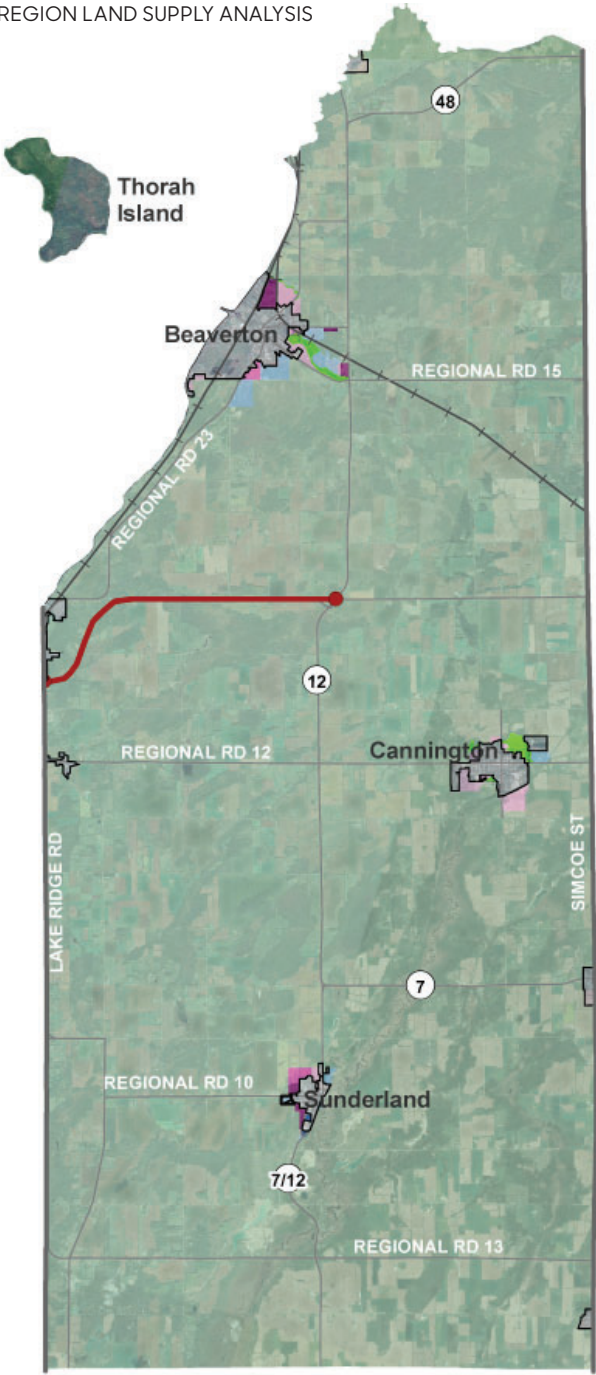
Community Area



Employment Area

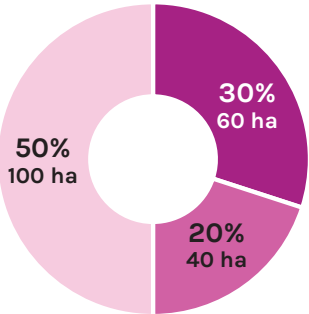


- Built
- Draft Approved or Better
- Vacant

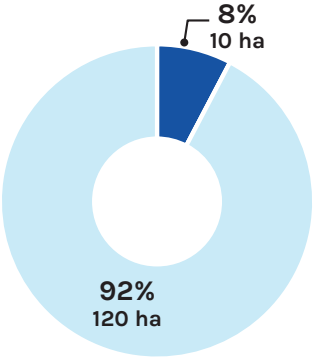


Township of Scugog

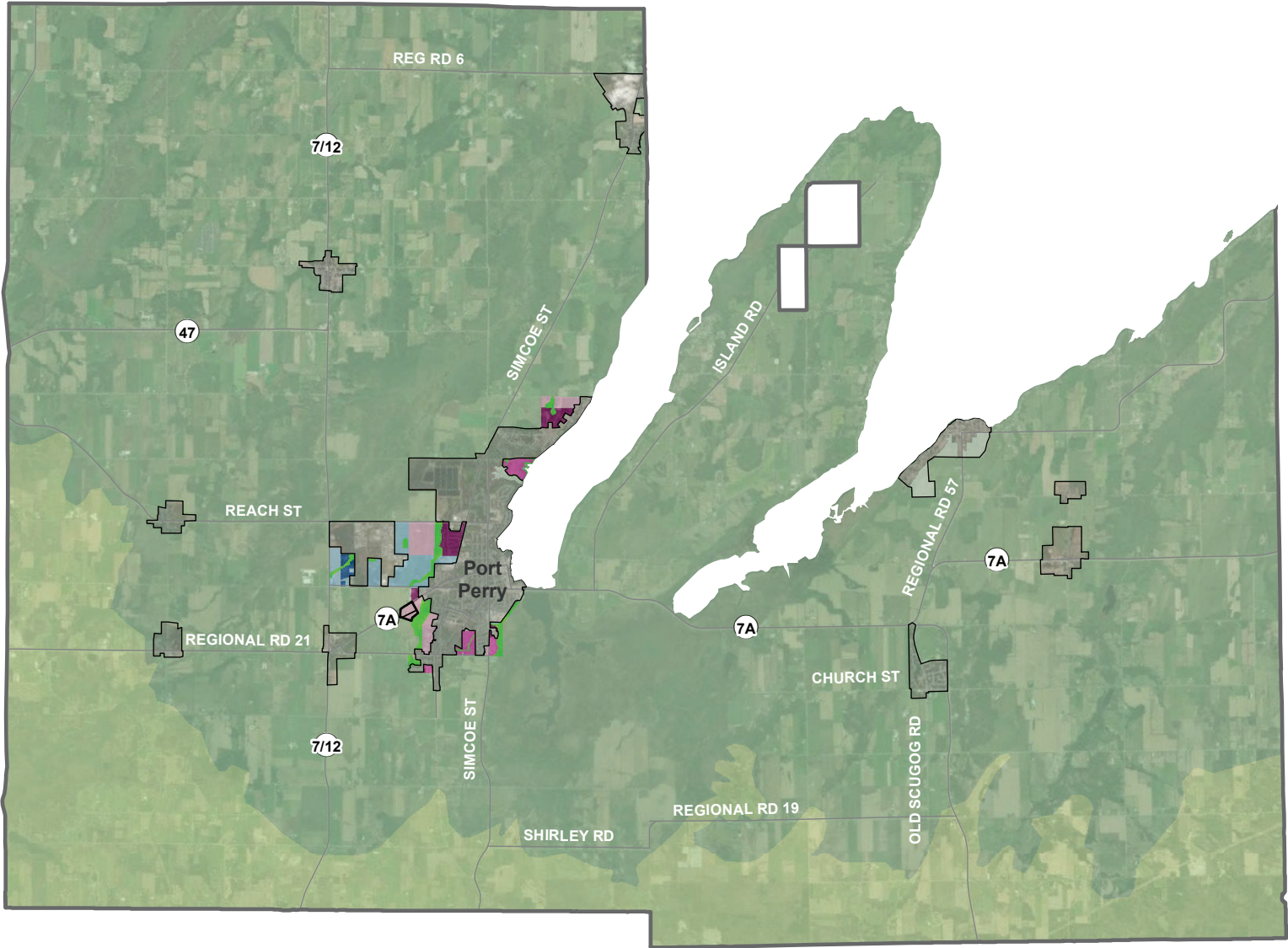
Community Area



Employment Area



- Built
- Draft Approved or Better
- Vacant



York Region

Demographics

- 31% population growth occurred between 2006 and 2021 (280,622 people not adjusted for undercount).
- 33% employment growth occurred between 2006 and 2021 (136,665 jobs).
- The proportion of single- and semi-detached units within York Region's housing mix has decreased from 74% in 2006 to 68% in 2021.
- York Region's main housing type is predominantly *Grade-Related*, where only 9% of the population lives in apartments which comprise 15% of the total occupied *Private Dwellings* in 2021.
- In 2021, *Housing Suitability* is worsening for households living in one- and two-bedroom dwellings. 16% of one-bedroom dwellings (up from 14% in 2016) and 10% of two-bedroom dwellings (up from 8% in 2016) accommodate households that require additional bedrooms in order to be housed suitably.
- In 2021, 81% of all households were comprised of families, where 92% of households have two-bedrooms or more.
- York Region accommodated 4% of Canada's national immigration between 2016 and 2021, where immigration was overwhelmingly comprised of younger immigrants, with 44% age 24 and under, and 45% between the ages of 25-44.

- In 2021, *Apartments or Flats in a Duplex* comprised 4% of the total units in York Region and 1% of the total unit growth from 2006 to 2021. This is likely to continue to reflect the potential for additional units from secondary and tertiary suites as a component of growth moving forward to 2051.

Growth Forecasts and Land Needs

- Based on the 2020 Growth Plan, York Region is forecast to accommodate 18% of the population (2,020,000 people) and 18% of the employment (990,000 jobs) within the *GTHA* by 2051.
- 24% of the population growth (658,000 people), 21% of the household unit growth (218,000 units), and 27% of employment growth (329,000 jobs) within the 2006-2031 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within the York Region.
- Beyond the original 2031 forecast, 20% of the population growth (430,000 people), 18% of the household unit growth (171,000 units), and 21% of the employment growth (200,000 jobs) within the 2031-2051 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within York Region.
- As of 2021, York Region has a housing shortfall of 20,400 *Grade-Related Housing* units and 3,700 apartment units based on the original forecasts of the Growth Plan

- York Region's 2021-2051 housing forecast for apartments (44% and 121,400 units) is higher than the Province's (through Hemson) forecasted apartment growth (29% and 80,000 units) and is aspirational when compared to the 27% share of apartment growth (30,900 units) from 2006 to 2021.
- Based on the adopted Official Plan, the projected shortfall of *Grade-Related Housing* units in York Region will be 36,600 units to the year 2051, equating to a land shortfall of approximately 1,800 ha. If this shortfall were provided for in the *BUA* of York Region, it would require 8% of existing neighbourhoods to be re-developed.

Land Supply

- 33% of the total *DGA* in York Region has been *Built*, of which 37% of the *Community Area DGA* and 20% of the *Employment Area DGA* have been *Built*.
- Approximately 75% of land within the *Community Area* (including both the *BUA* and *DGA*) is within a *Low-Density* designation (commonly referred to as the 'Yellowbelt').
- 12% of *Community Area DGA* and 13% of *Employment Area DGA* in York Region was consumed from 2018-2023.
- York Region has the largest supply of total *DGA* (16,600 hectares).
- York Region has the highest proportion of *Committed DGA* across the *GTHA* at 45%, of which 38% is *Community Area* and 7% is *Employment Area*.
- Within the *GTHA*, York Region has the largest supply of *Vacant Community Area DGA* (6,200 hectares), the majority of which is within the Town of East Gwillimbury and the Cities of Markham and Vaughan.

- The *Settlement Area Boundary Expansion Area* that is to accommodate growth from 2031-2051 represents a 7% increase of York Region's *Settlement Area*, compared to a 27% population increase.
- There is 700 ha of *Whitebelt* land remaining to accommodate growth in York Region outside of Provincial Plan areas, which is the smallest supply of *Whitebelt* land in the *GTHA*.

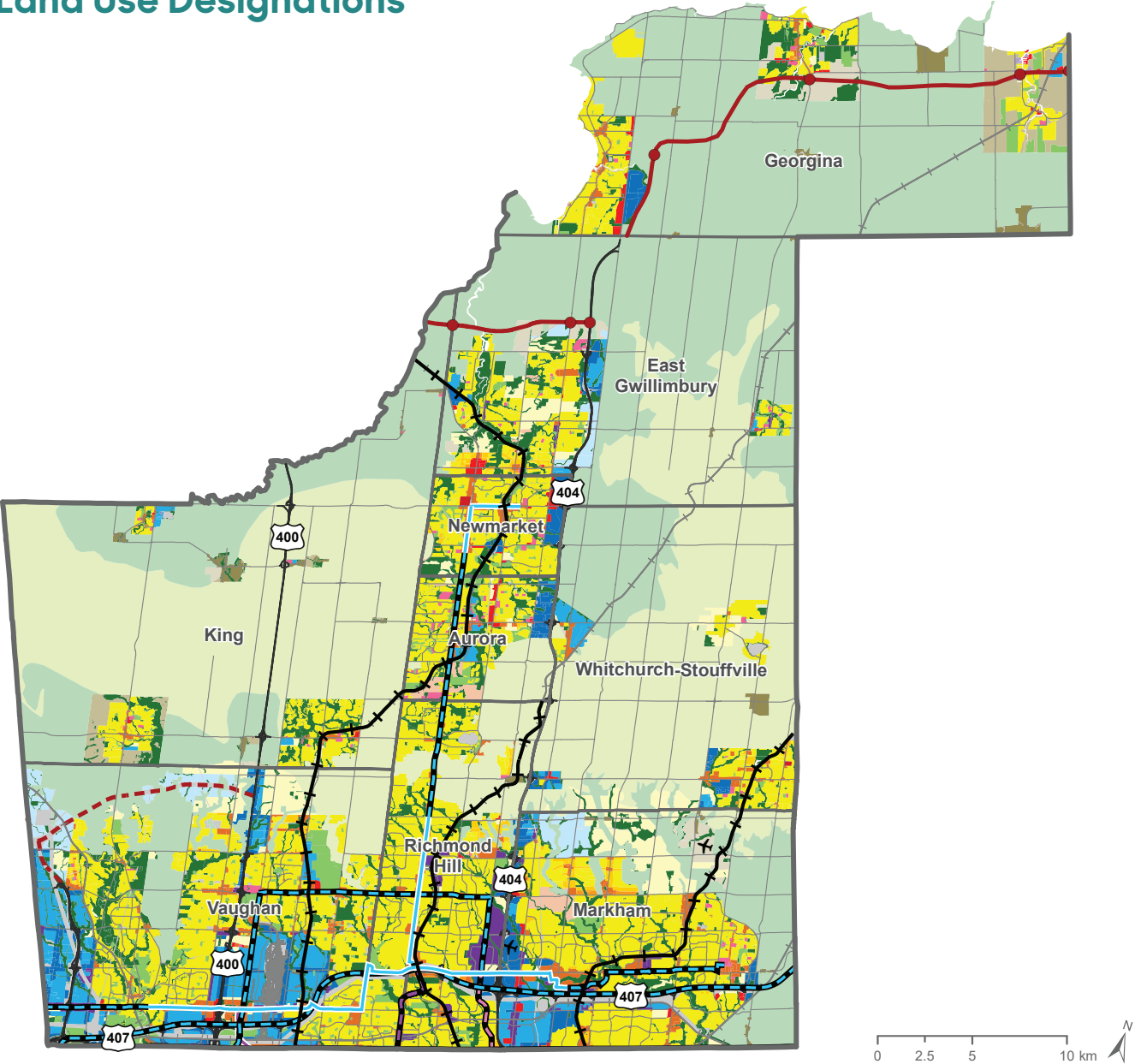
Generalized Official Plan Land Use Designations

Generalized Land Use Designations

- Community Area - Designation TBD
- Estate Residential
- Low Density Residential
- Medium Density Residential
- High Density Residential
- General Commercial
- Retail Commercial
- EmploymentArea - Designation TBD
- General Employment
- Prestige Employment
- Mixed Use Residential
- Mixed Use Employment
- Institutional
- Recreation-Park
- Environmental
- Major Highway/Utility
- Extraction Area
- Agricultural
- Rural
- Rural Settlement
- Study Area

Transit Routes

- Existing GO Train Line
- Proposed LRT
- Proposed Subway
- Existing BRT
- Proposed BRT



Note: Generalized land use designations for illustrative purposes only.

Settlement Area Population and Employment Density

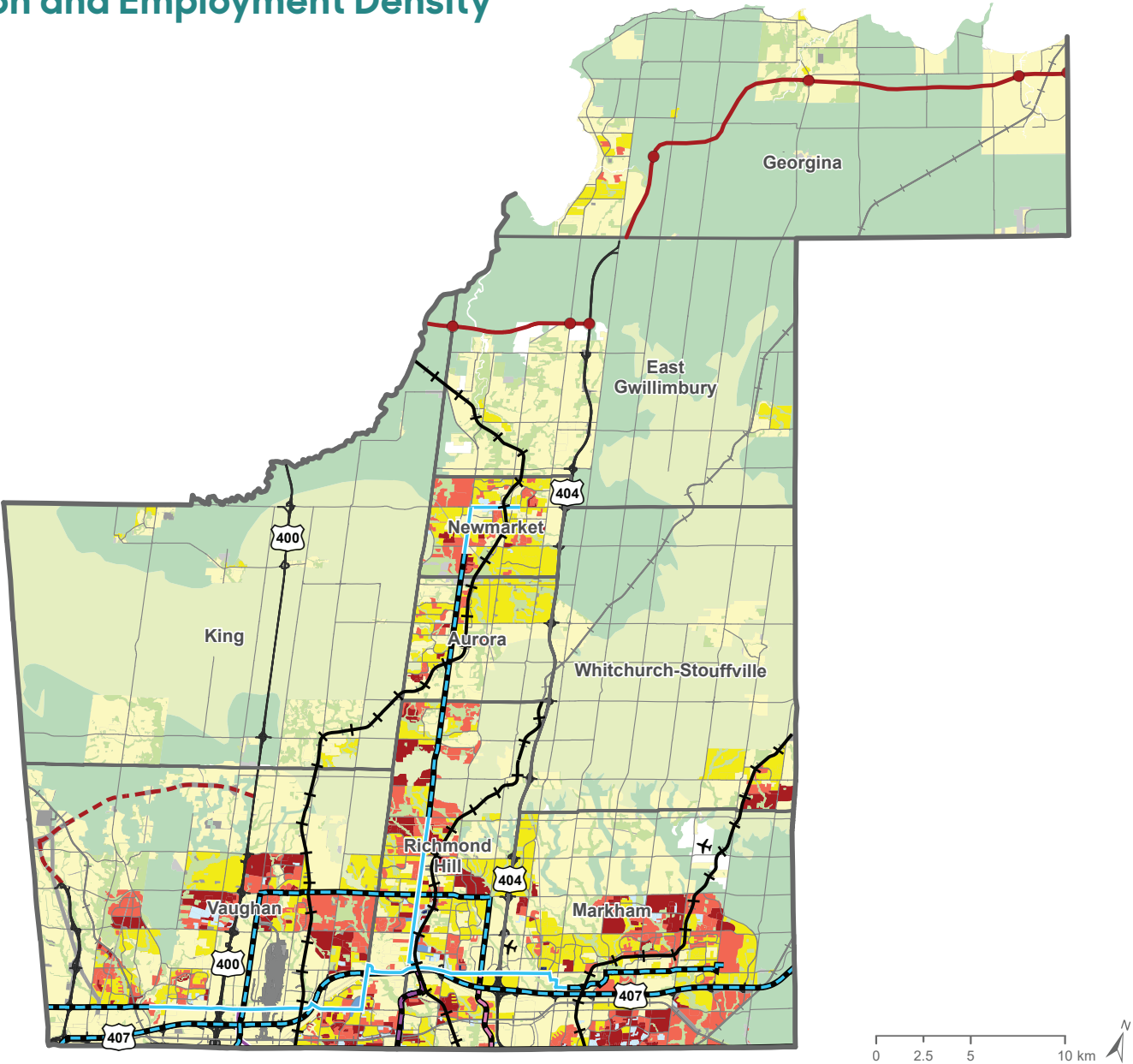
YORK

Density
(People & Jobs/ha)

- < 30
- 30 - 49.9
- 50 - 69.9
- 70 - 99.9
- 100 - 149.9
- 150 - 199.9
- 200+
- N/A

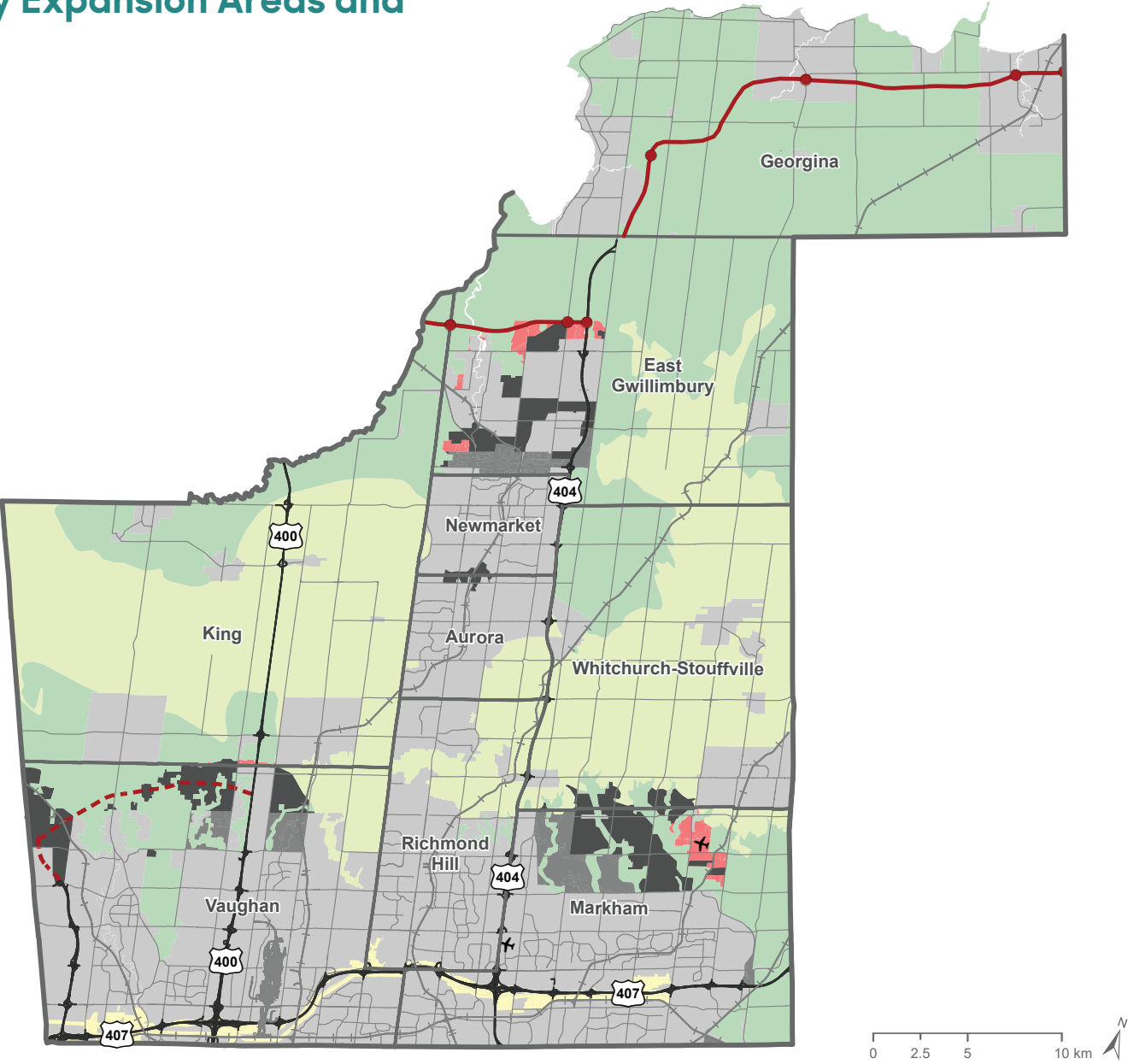
Transit Routes

- Existing GO Train Line
- Proposed LRT
- Proposed Subway
- Existing BRT
- Proposed BRT



Note: Density by Census Dissemination Area

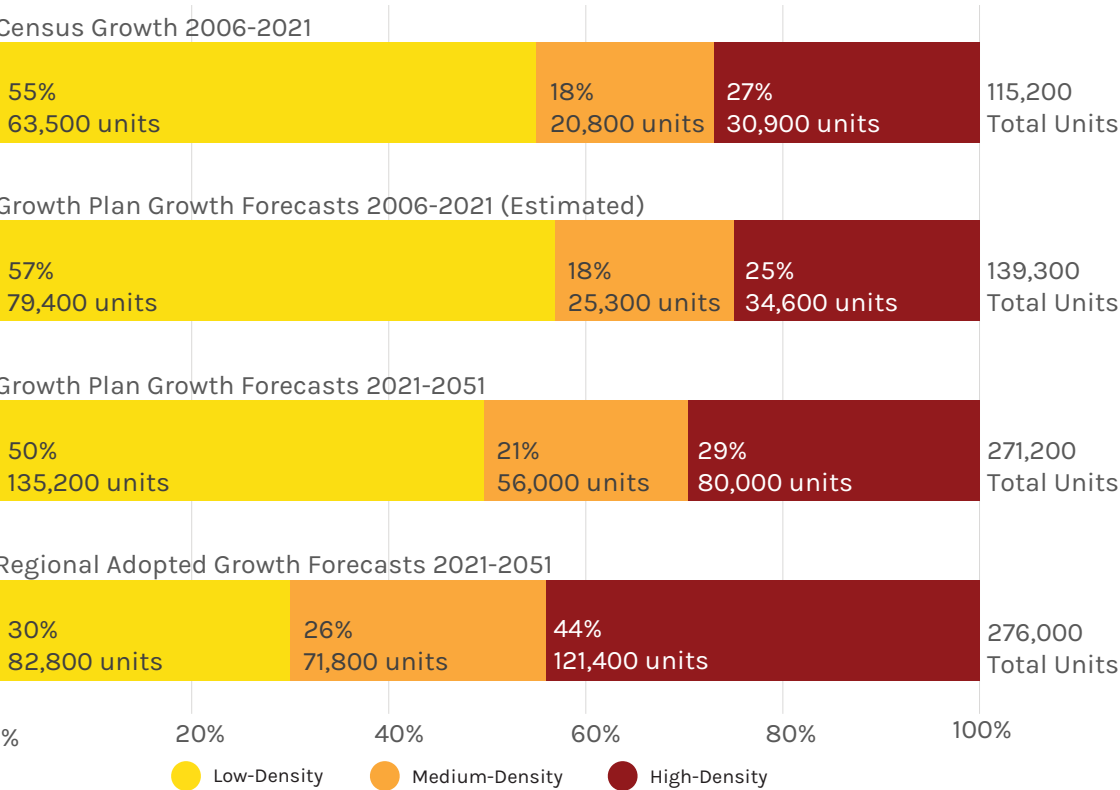
Settlement Area Boundary Expansion Areas and Remaining Whitebelt



- ✈ Airport
 - ✈ Proposed Airport
 - EA Approved Highway Route
 - - - Transportation Corridor Under Study
- Provincial Plans**
- Parkway Belt West Plan
 - Oak Ridges Moraine Conservation Plan
 - Niagara Escarpment Conservation Plan
 - Greenbelt Plan
- Settlement Area**
- Settlement Area as of 2006
 - Boundary Expansion Area to 2031
 - Boundary Expansion Area to 2051
 - Whitebelt (Developable Area - 700 ha)

Unit Growth/Forecasts and Land Needs Assessment Comparisons

York Region Unit Growth/Forecasts



Notes:
1. Adopted Official Plan unit growth forecasts based on the Land Needs Assessment scenario that supported the adopted Official Plan.
2. Values rounded to nearest 100.
3. Totals may not add up due to rounding.
4. See Appendix for full set of notes.

Comparisons

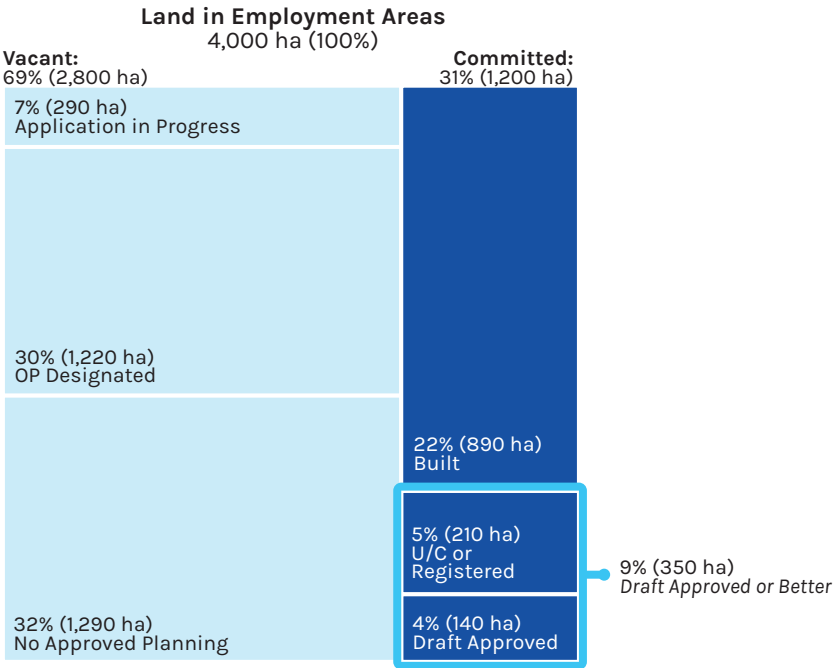
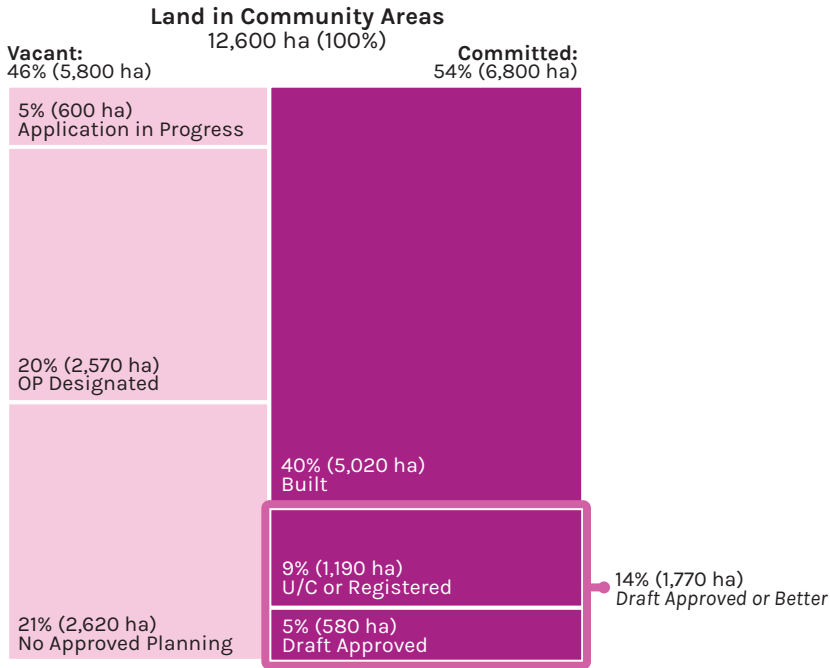
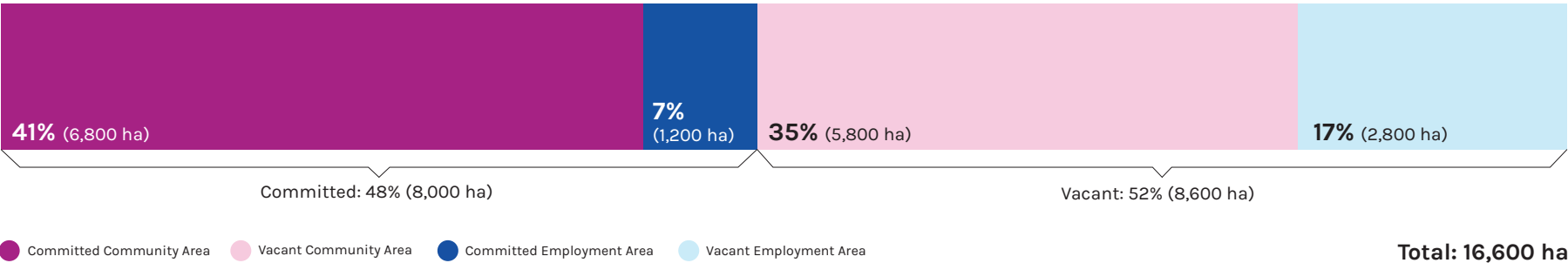
Census Growth vs. Growth Plan Growth Forecasts 2006-2021	
Shortfall (-) / Surplus (+)	
Low-Density	-15,900
Medium-Density	-4,500
High-Density	-3,700
Total Units	-24,100

Adopted Official Plan vs. Growth Plan Growth Forecasts 2021-2051	
Shortfall (-) / Surplus (+)	
Low-Density	-52,400
Medium-Density	+15,800
High-Density	+41,400
Total Units	+4,800

Regionally Adopted OP vs. Provincially Approved OP Settlement Area Boundary Expansion Area		
	Regionally Adopted	Provincially Approved
Community Area (ha)	2,100	2,900
Employment Area (ha)	1,100	1,000
Total SABE Area (ha)	3,200	3,900

Detailed Designated Greenfield Area Land Supply Breakdown

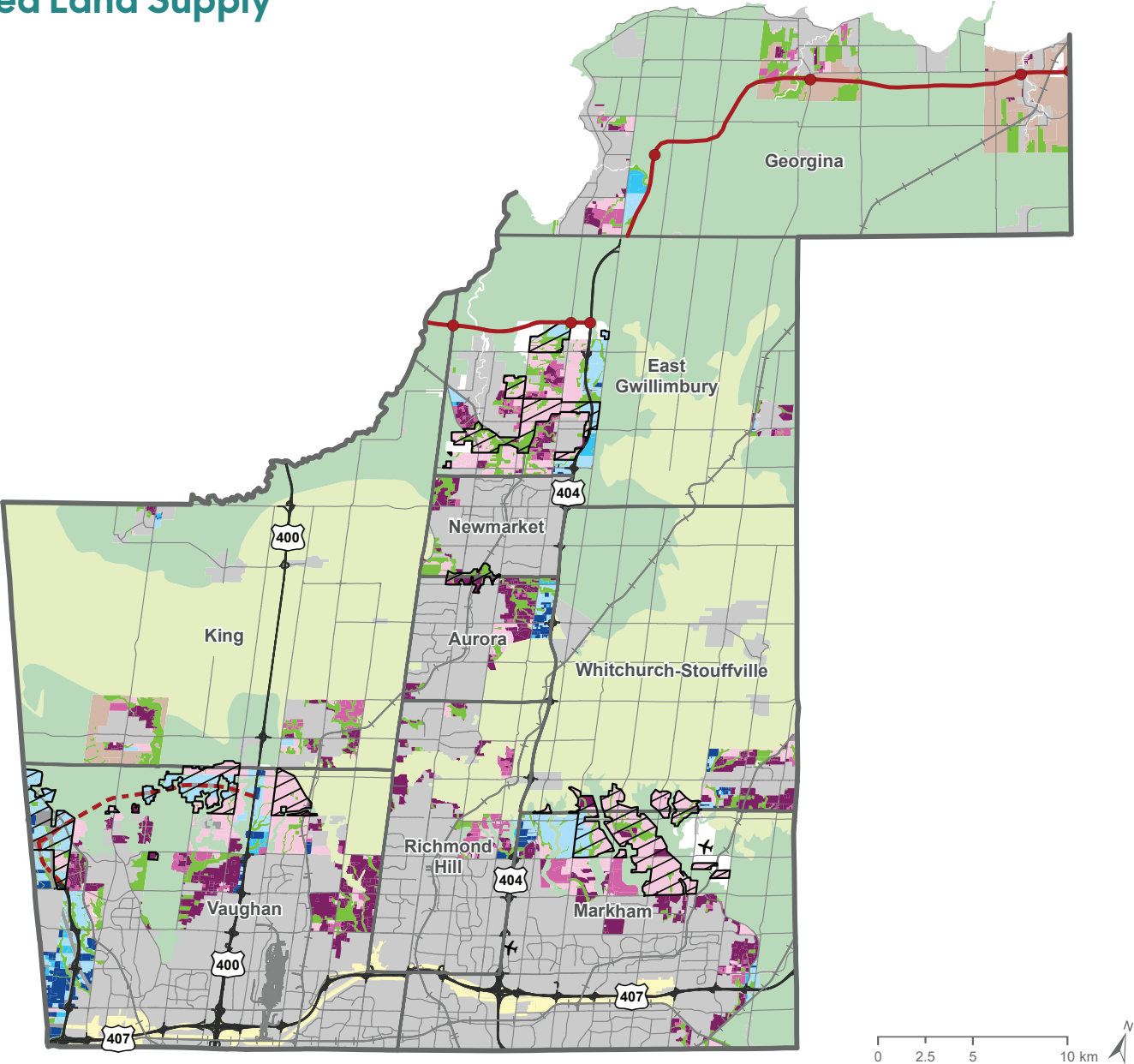
Designated Greenfield Area in York Region by Land Use and Status



Note: Totals may not add up due to rounding.

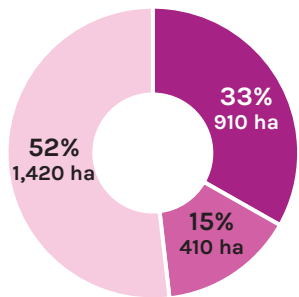
Designated Greenfield Area Land Supply

- YORK
- Built-Up Area
 - Airport
 - EA Approved Highway Route
 - Transportation Corridor Under Study
 - Provincial Plans**
 - Parkway Belt West Plan
 - Oak Ridges Moraine Conservation Plan
 - Greenbelt Plan
 - Designated Greenfield Areas**
 - Settlement Area
 - Boundary Expansion Area
 - Uses to be Determined
 - Community Area**
 - Built
 - Draft Approved or Better
 - Vacant
 - Employment Area**
 - Built
 - Draft Approved or Better
 - Vacant
 - Non-Developable Area**
 - Environmental Feature / Cemetery
 - Major Infrastructure
 - Agricultural and Rural Area

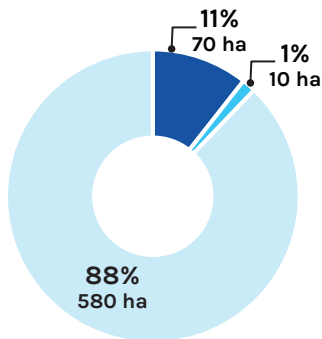


City of Markham

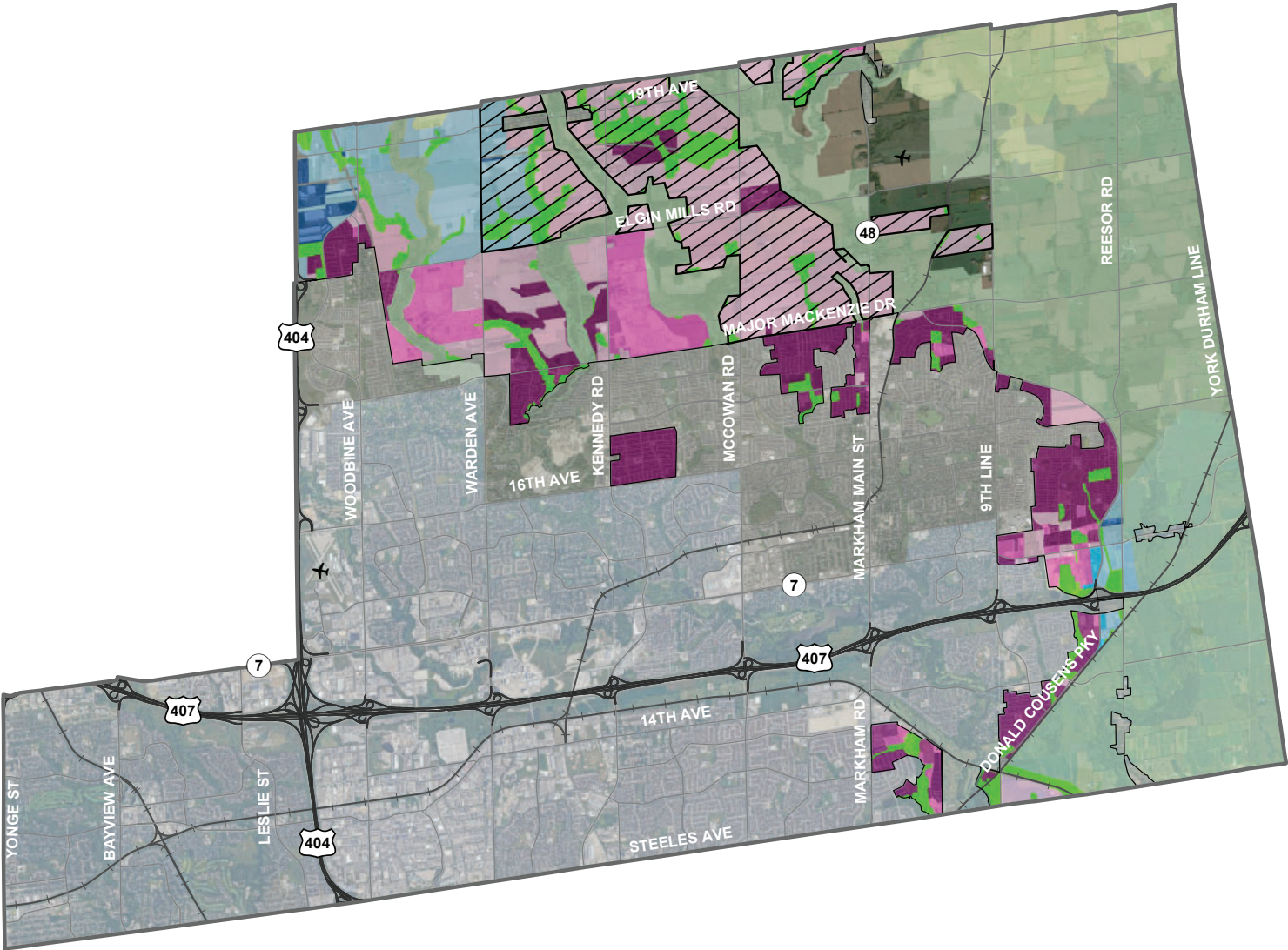
Community Area



Employment Area

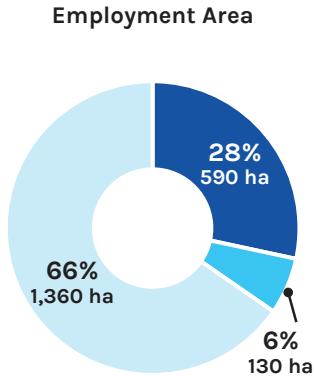
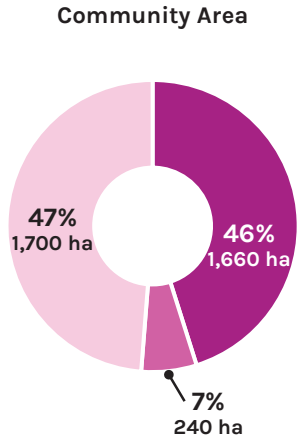


- Built
- Draft Approved or Better
- Vacant
- Settlement Area Boundary Expansion Area

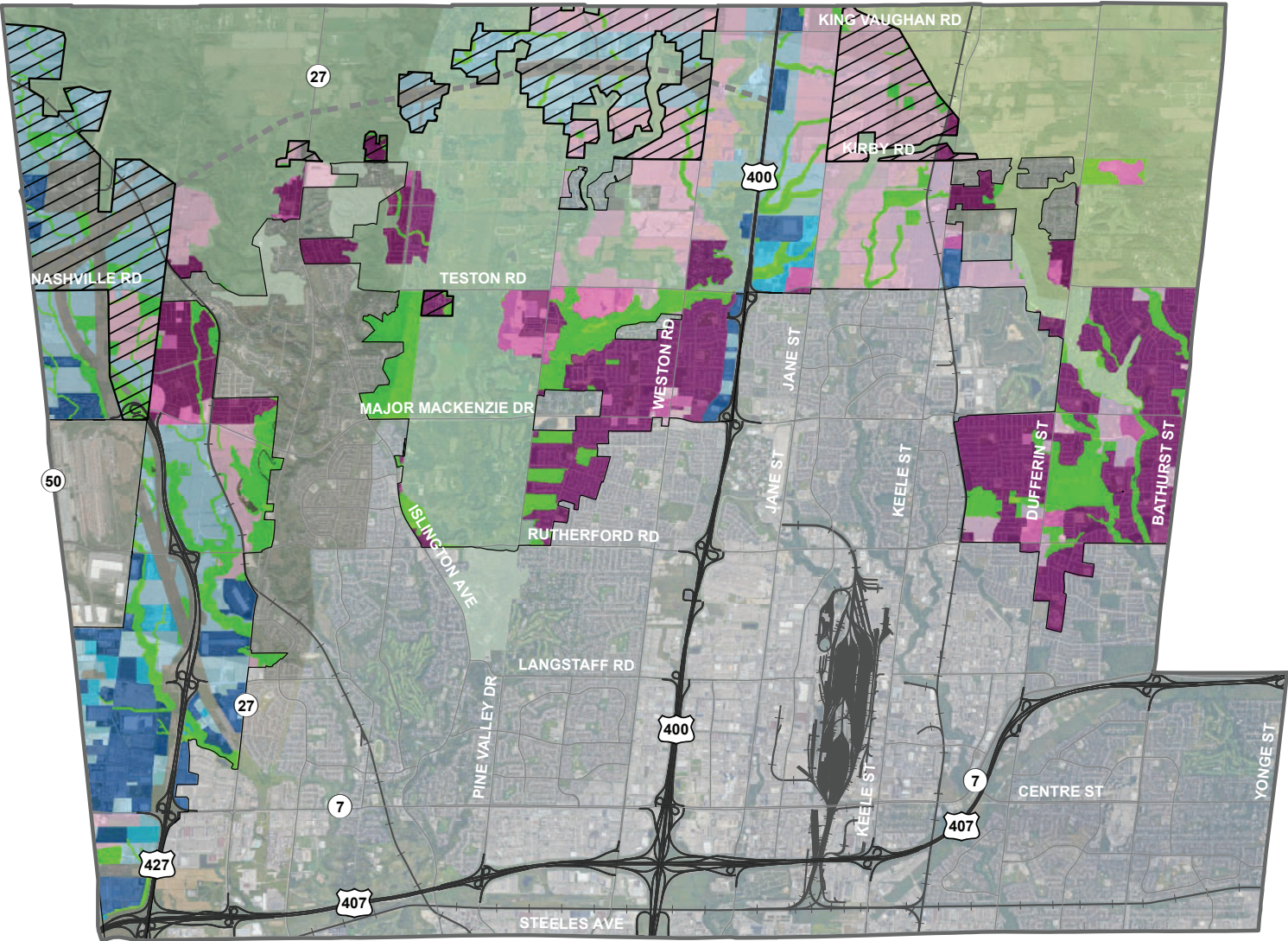


City of Vaughan

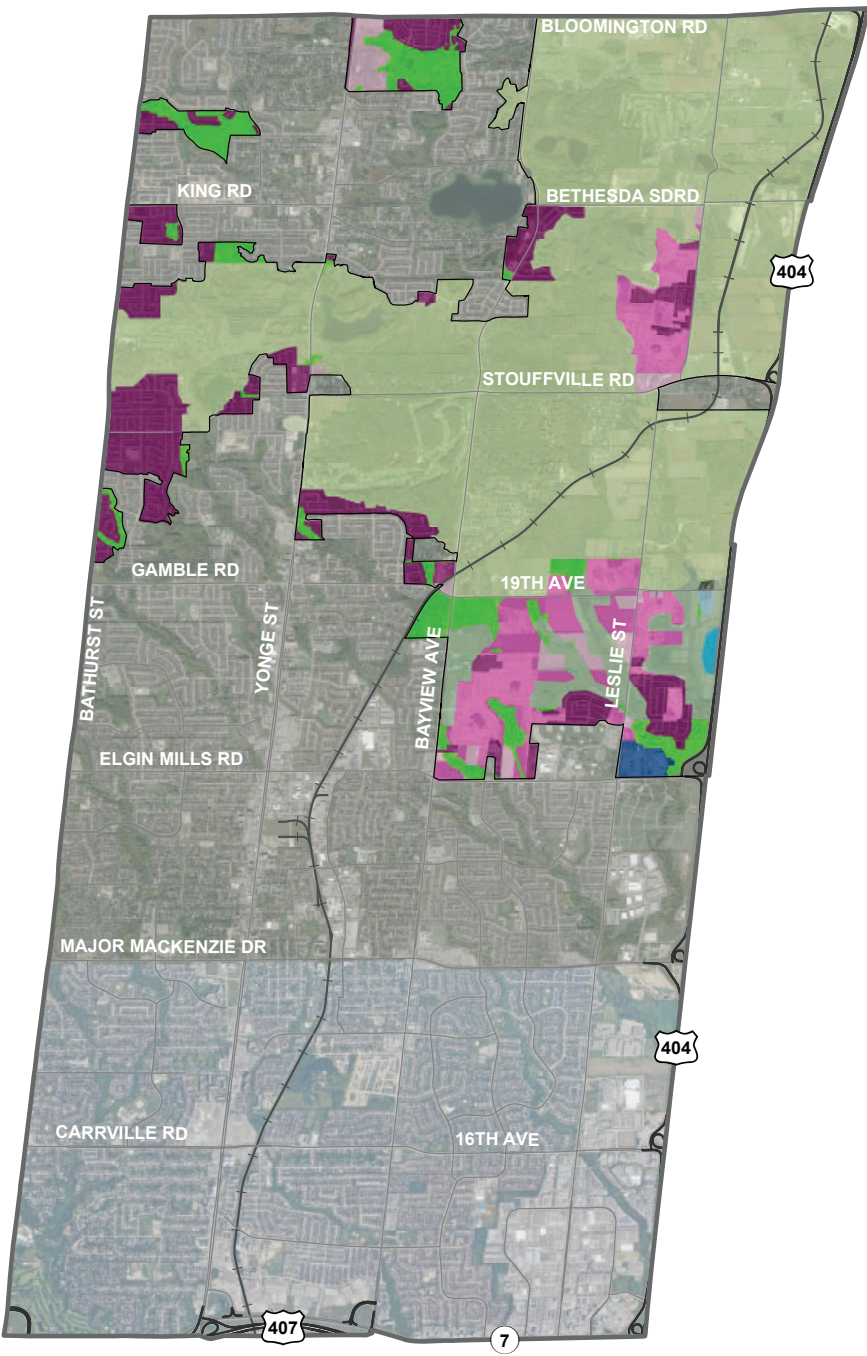
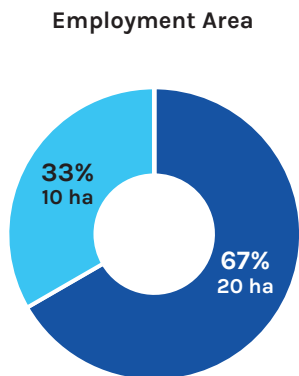
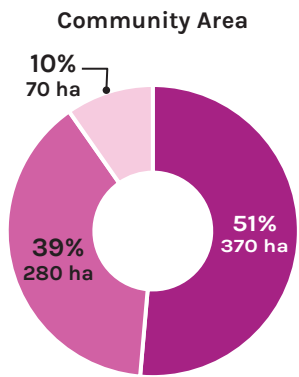
YORK



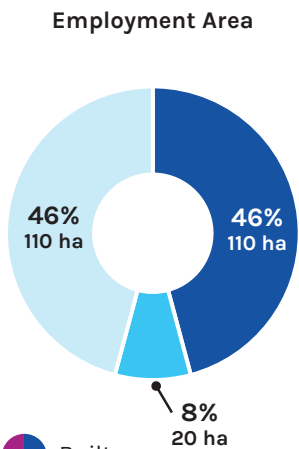
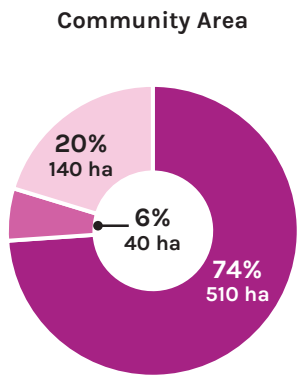
- Built
- Draft Approved or Better
- Vacant
- Settlement Area Boundary Expansion Area



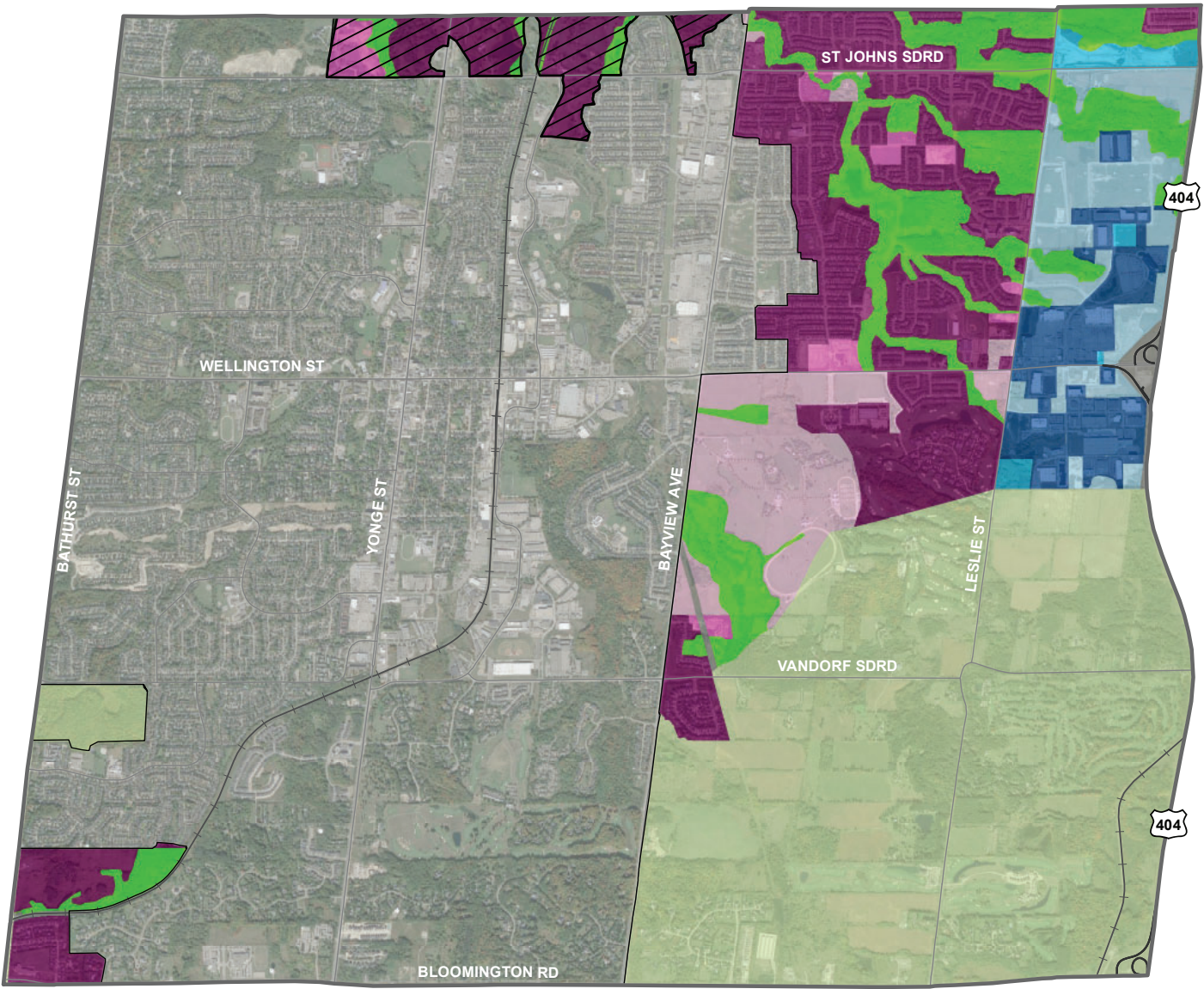
City of Richmond Hill



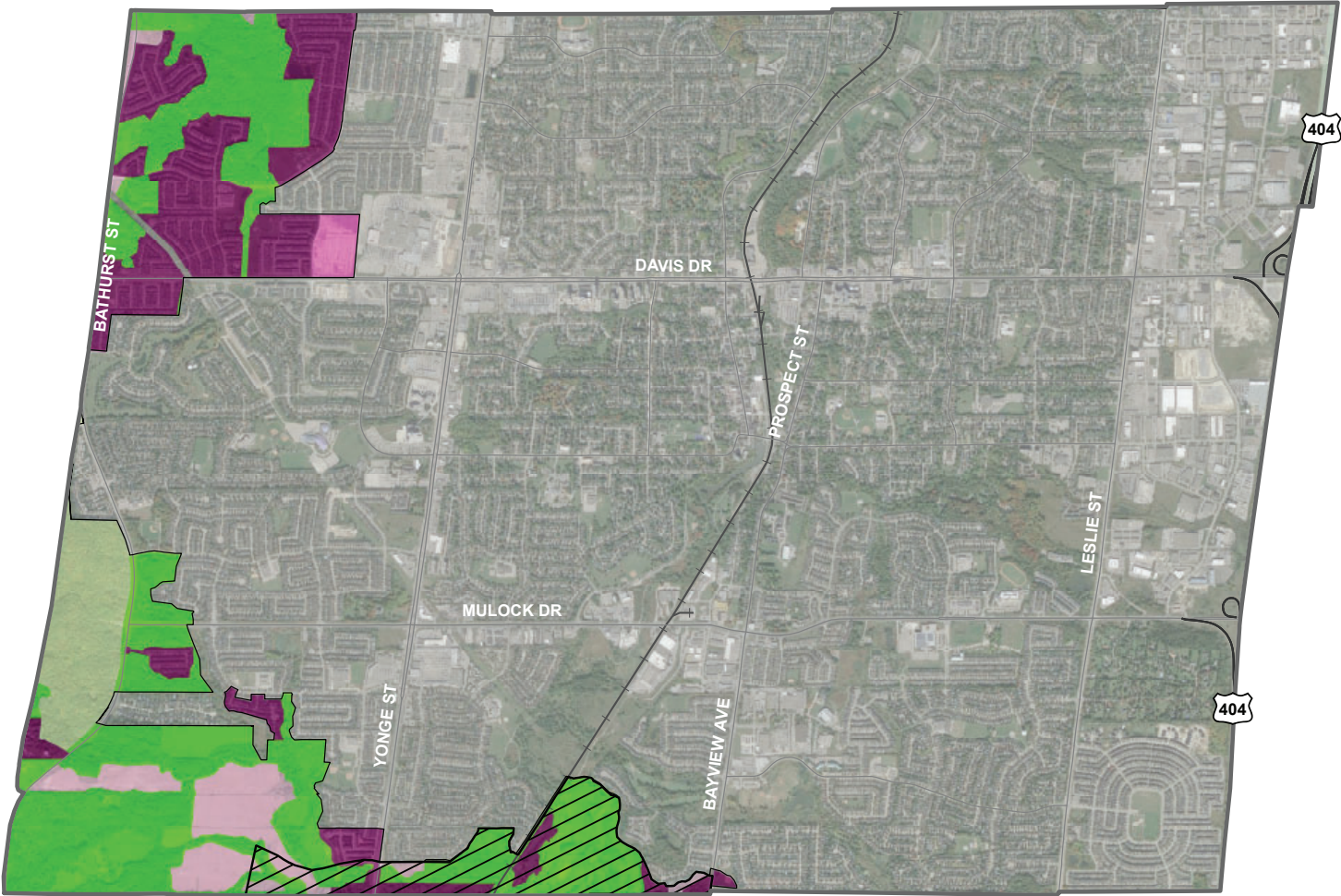
Town of Aurora



- Built
- Draft Approved or Better
- Vacant
- Settlement Area Boundary Expansion Area



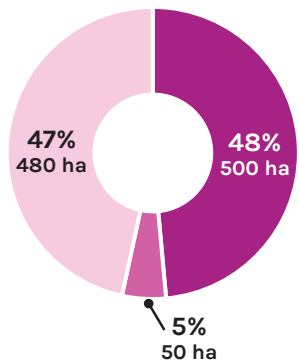
Town of Newmarket



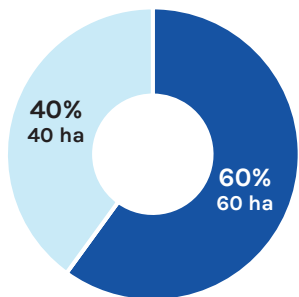
Town of Whitchurch-Stouffville

YORK

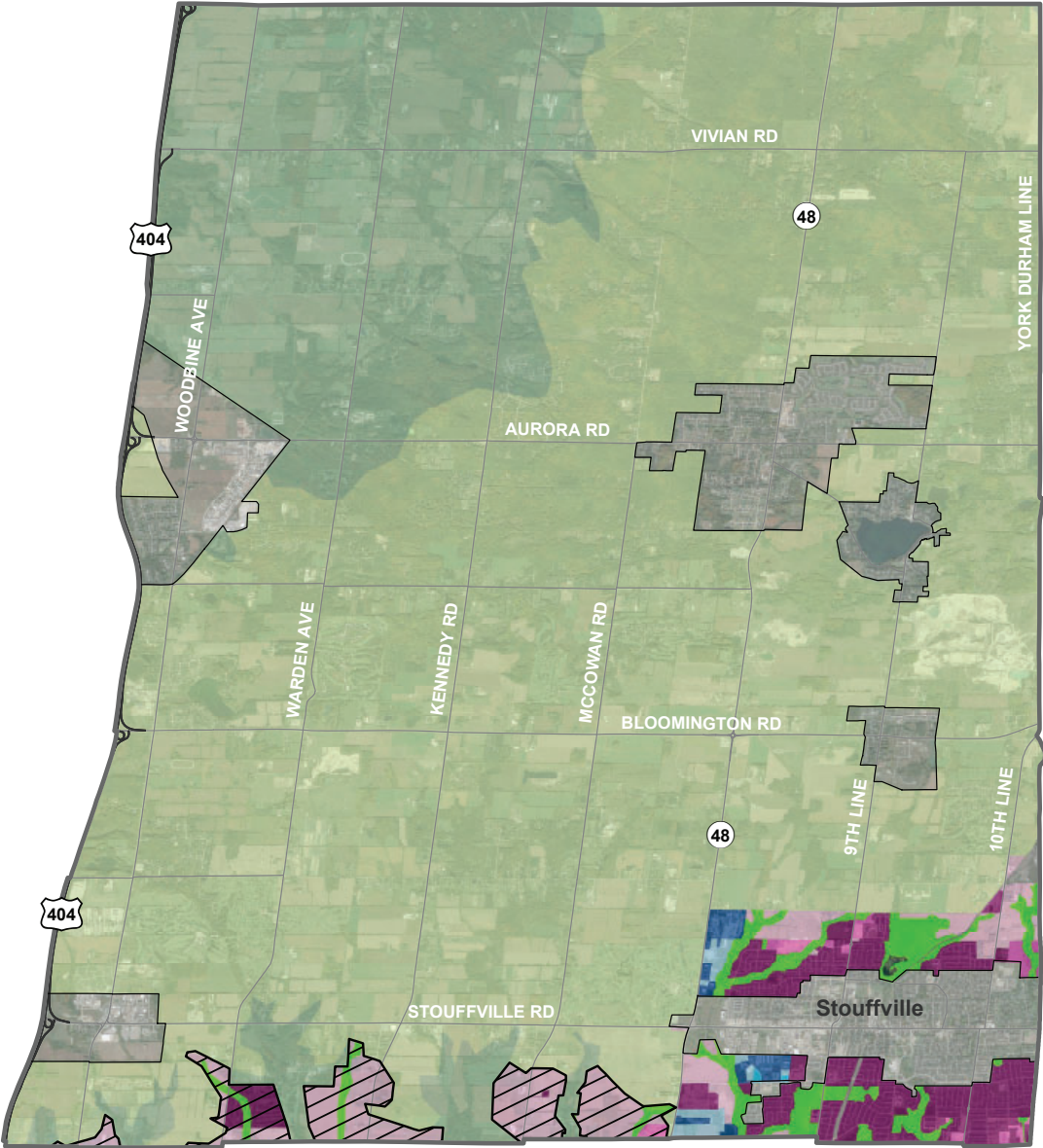
Community Area



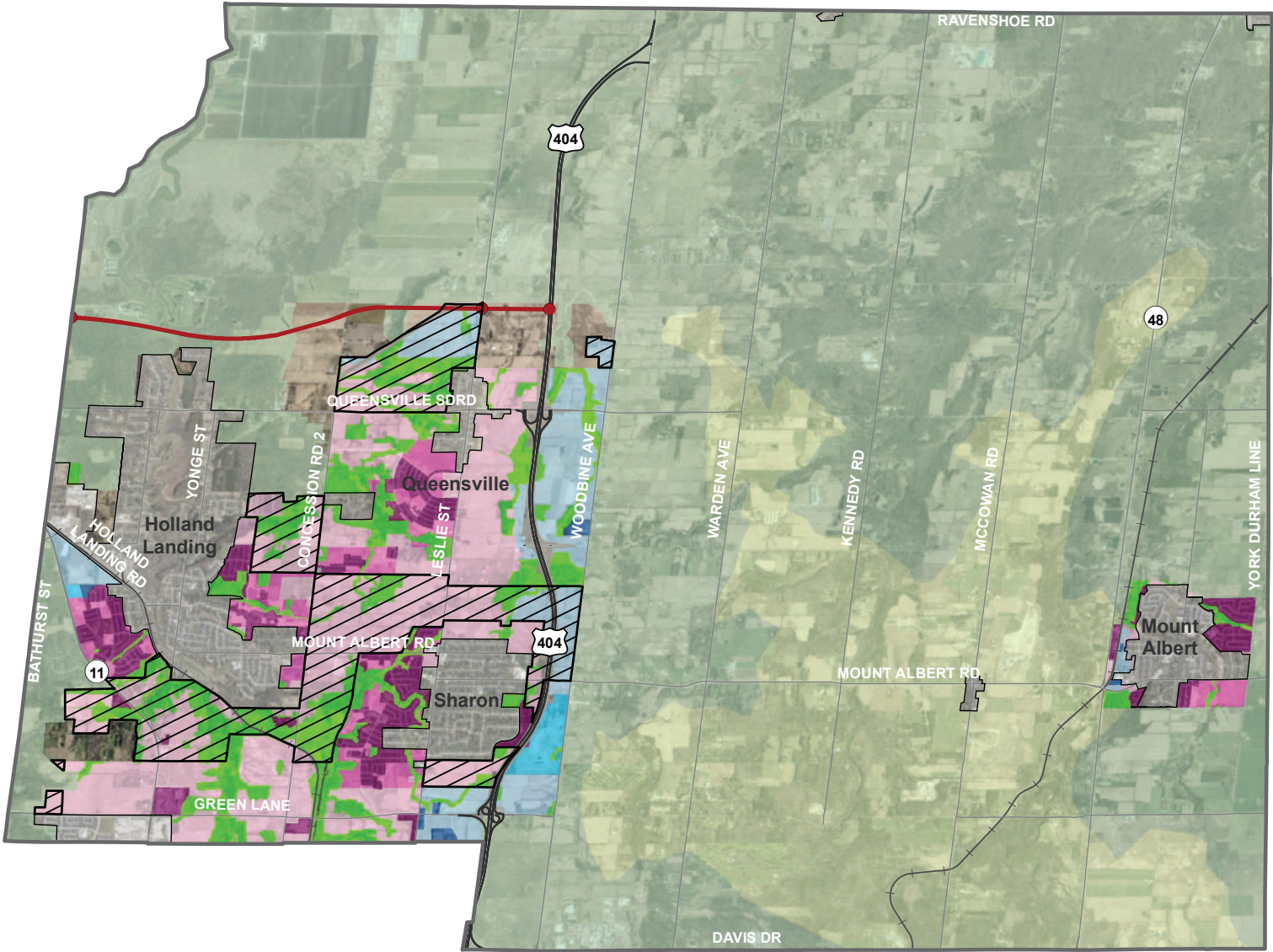
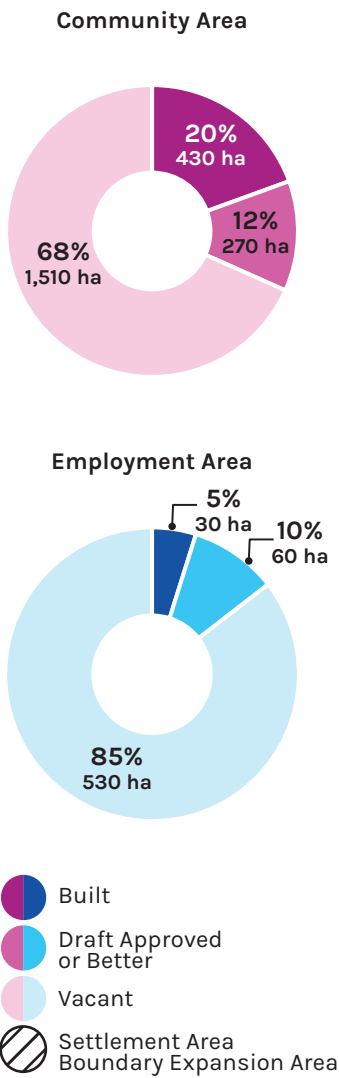
Employment Area



- Built
- Draft Approved or Better
- Vacant
- Settlement Area Boundary Expansion Area

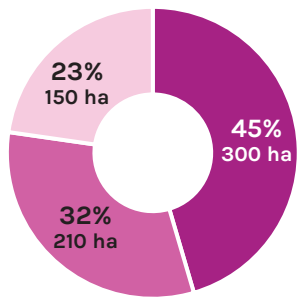


Town of East Gwillimbury

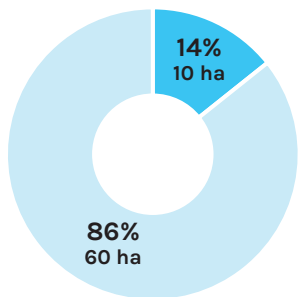


Township of King

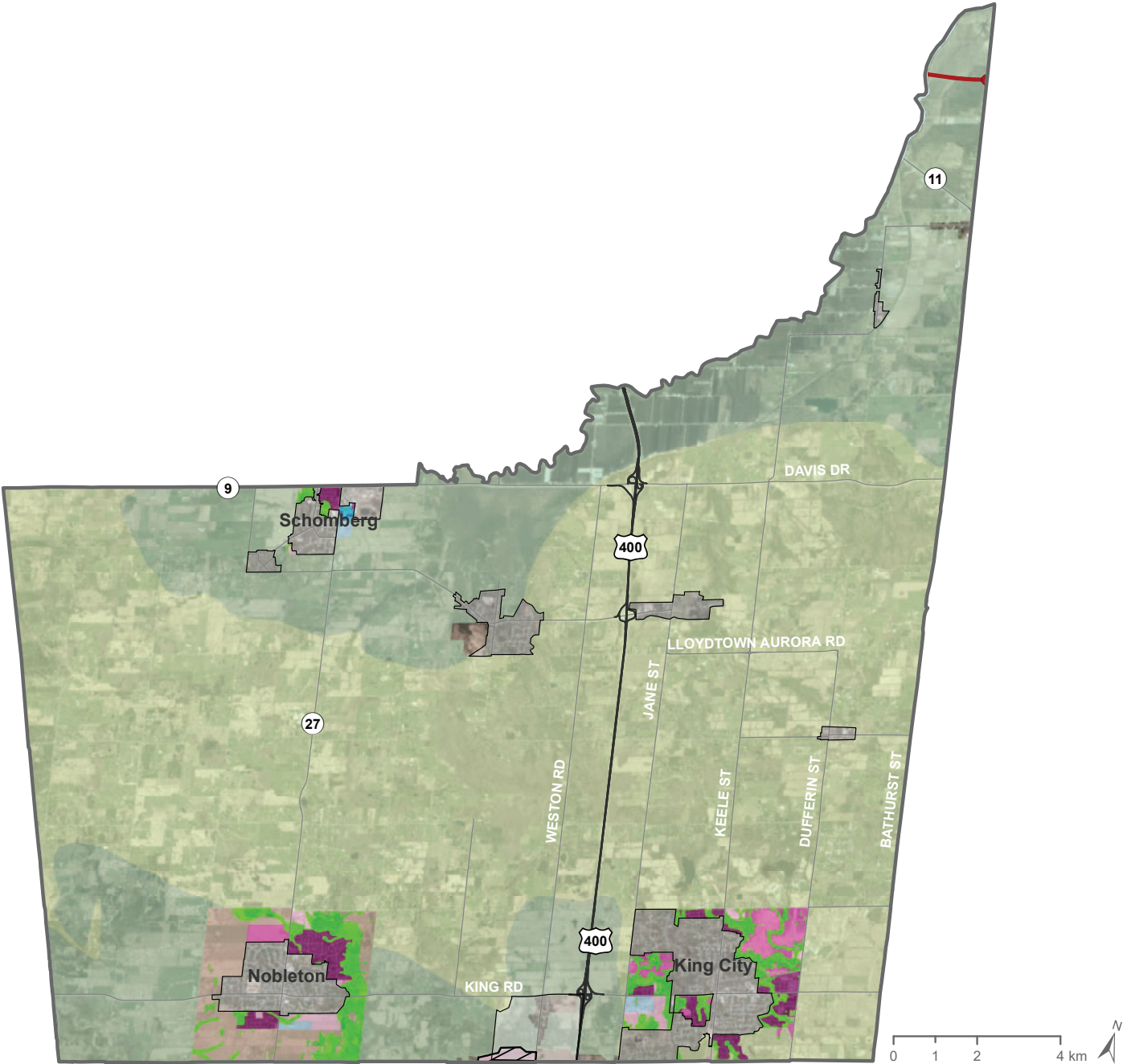
Community Area



Employment Area

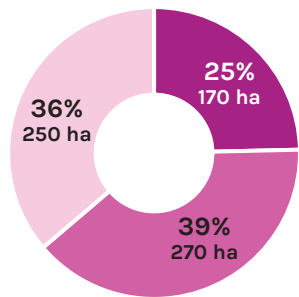


- Built
- Draft Approved or Better
- Vacant
- Settlement Area Boundary Expansion Area

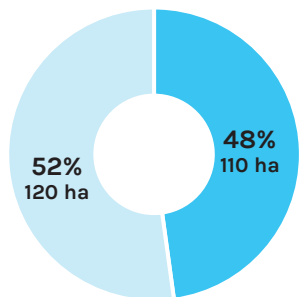


Town of Georgina

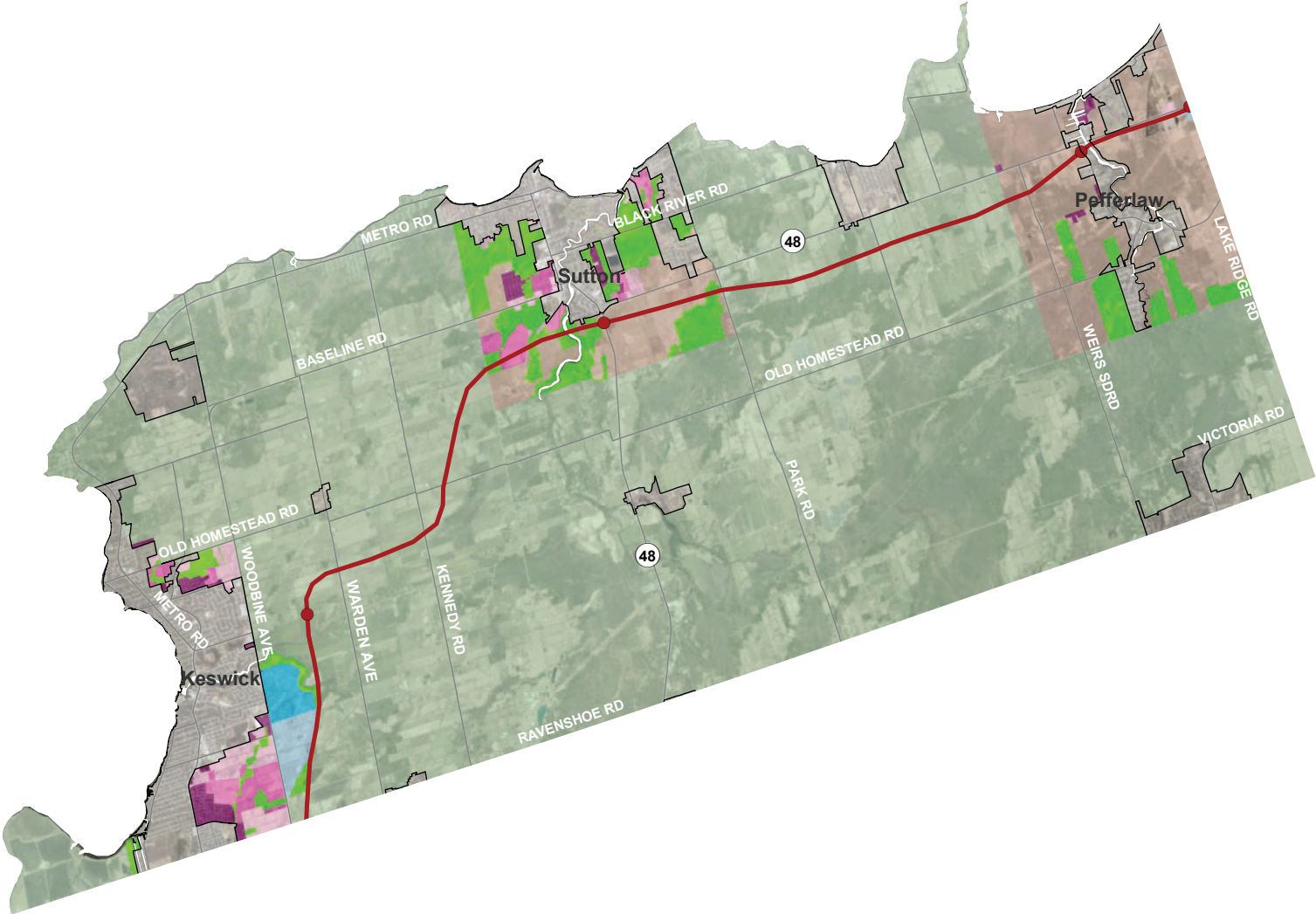
Community Area



Employment Area



- Built
- Draft Approved or Better
- Vacant



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Peel Region

Demographics

- 25% population growth occurred between 2006 and 2021 (291,617 people not adjusted for undercount).
- 25% employment growth occurred between 2006 and 2021 (136,665 jobs).
- The proportion of single- and semi-detached units within Peel Region's housing mix has decreased from 59% in 2006 to 58% in 2021.
- Peel Region's main housing type is predominantly *Grade-Related*, where only 18% of the population lives in apartments which comprise 25% of the total occupied *Private Dwellings* in 2021.
- In 2021, *Housing Suitability* is worsening for households living in one- and two-bedroom dwellings. 24% of one-bedroom dwellings (up from 17% in 2016) and 21% of two-bedroom dwellings (up from 18% in 2016) accommodate households that require additional bedrooms in order to be housed suitably.
- In 2021, 80% of all households were comprised of families, where 90% of households have two-bedrooms or more.
- Peel Region accommodated 8% of Canada's national immigration between 2016 and 2021, where immigration to Peel Region was overwhelmingly comprised of younger immigrants, with 45% age 24 and under, and 45% between the ages of 25-44.

- In 2021, *Apartments or Flats in a Duplex* comprised 4% of the total units in Peel Region and 6% of the total unit growth from 2006 to 2021. This is likely to continue to reflect the potential for additional units from secondary and tertiary suites as a component of growth moving forward to 2051.

Growth Forecasts and Land Needs

- Based on the 2020 Growth Plan, Peel Region is forecast to accommodate 20% of the population (2,280,000 people) and 20% of the employment (1,070,000 jobs) within the *GTHA* by 2051.
- 21% of the population growth (557,000 people), 17% of the household unit growth (179,000 units), and 23% of employment growth (272,000 jobs) within the 2006-2031 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within Peel Region.
- Beyond the original 2031 forecast, 24% of the population growth (510,000 people), 20% of the household unit growth (191,400 units), and 20% of the employment growth (190,000 jobs) within the 2031-2051 *GTHA* forecast (from the Growth Plan and supporting technical documents) is to occur within Peel Region.
- As of 2021, Peel Region has a housing shortfall of 7,300 *Grade-Related Housing* units and 22,000 apartment units based on the original forecasts of the Growth Plan.

- Peel Region's 2021-2051 housing forecast for apartments (48% and 130,200 units) is higher than the Province's (through Hemson) forecasted apartment growth (25% and 68,000 units) and is aspirational when compared to the 26% share of apartment growth (23,700 units) from 2006 to 2021.
- Based on the adopted Official Plan, the projected shortfall of *Grade-Related Housing* units in Peel Region will be 59,000 units to the year 2051, equating to a land shortfall of approximately 3,000 ha. If this shortfall were provided for in the *BUA* of Peel Region, it would require 18% of existing neighbourhoods to be re-developed.

Land Supply

- 32% of the total *DGA* in Peel Region has been *Built*, of which 36% of the *Community Area DGA* and 23% of the *Employment Area DGA* have been *Built*.
- Approximately 60% of land within the *Community Area* (including both the *BUA* and *DGA*) is within a *Low-Density* designation (commonly referred to as the 'Yellowbelt').
- 8% of *Community Area DGA* and 23% of *Employment Area DGA* in Peel Region was consumed from 2018-2023.
- Peel Region has the largest supply of land (5,500 hectares) added to the *Settlement Area*.
- Peel Region has the largest supply of *Vacant Employment DGA* within the *Settlement Area Boundary Expansion Area* (1,800 hectares).
- Within Peel Region, the Town of Caledon has the largest supply of *Vacant DGA*, of which 4,500 hectares is *Community Area* and 2,800 hectares is *Employment Area*.
- The *Settlement Area Boundary Expansion Area* that is to accommodate growth from 2031-2051 represents an 11% increase of Peel Region's *Settlement Area*, compared to a 29% population increase.
- There is 3,200 ha of *Whitebelt* land remaining to accommodate growth in Peel Region outside of Provincial Plan areas, all of which is in the Town of Caledon.

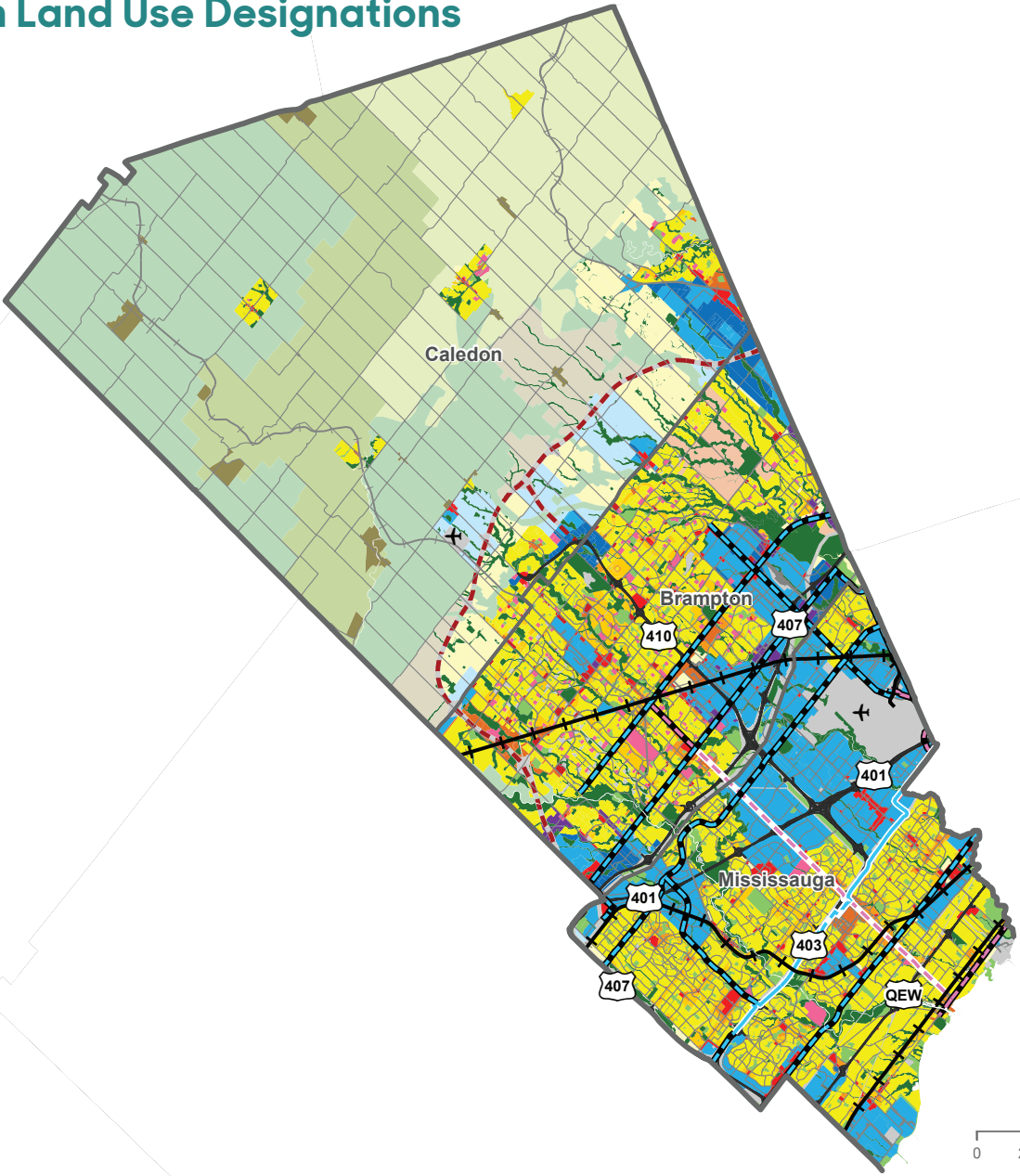
Generalized Official Plan Land Use Designations

Generalized Land Use Designations

- Community Area - Designation TBD
- Estate Residential
- Low Density Residential
- Medium Density Residential
- High Density Residential
- General Commercial
- Retail Commercial
- EmploymentArea - Designation TBD
- General Employment
- Prestige Employment
- Mixed Use Residential
- Mixed Use Employment
- Institutional
- Recreation-Park
- Environmental
- Major Highway/Utility
- Extraction Area
- Agricultural
- Rural
- Rural Settlement
- Study Area

Transit Routes

- Existing GO Train Line
- LRT Under Construction
- Proposed LRT
- Existing BRT
- BRT Under Construction
- Proposed BRT



Note: Generalized land use designations for illustrative purposes only.

Settlement Area Population and Employment Density

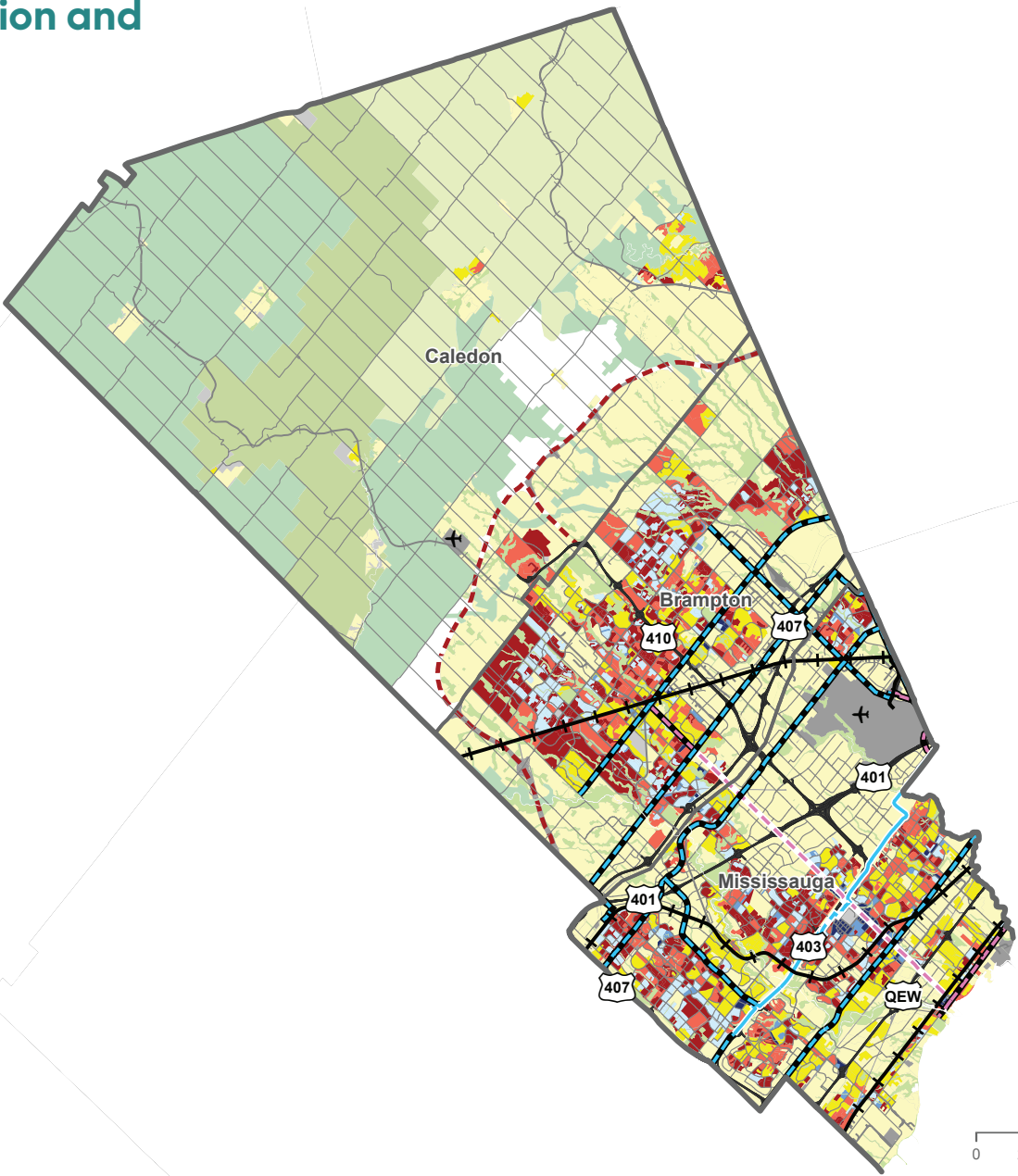
Density
(People & Jobs/ha)

- < 30
- 30 - 49.9
- 50 - 69.9
- 70 - 99.9
- 100 - 149.9
- 150 - 199.9
- 200+
- N/A

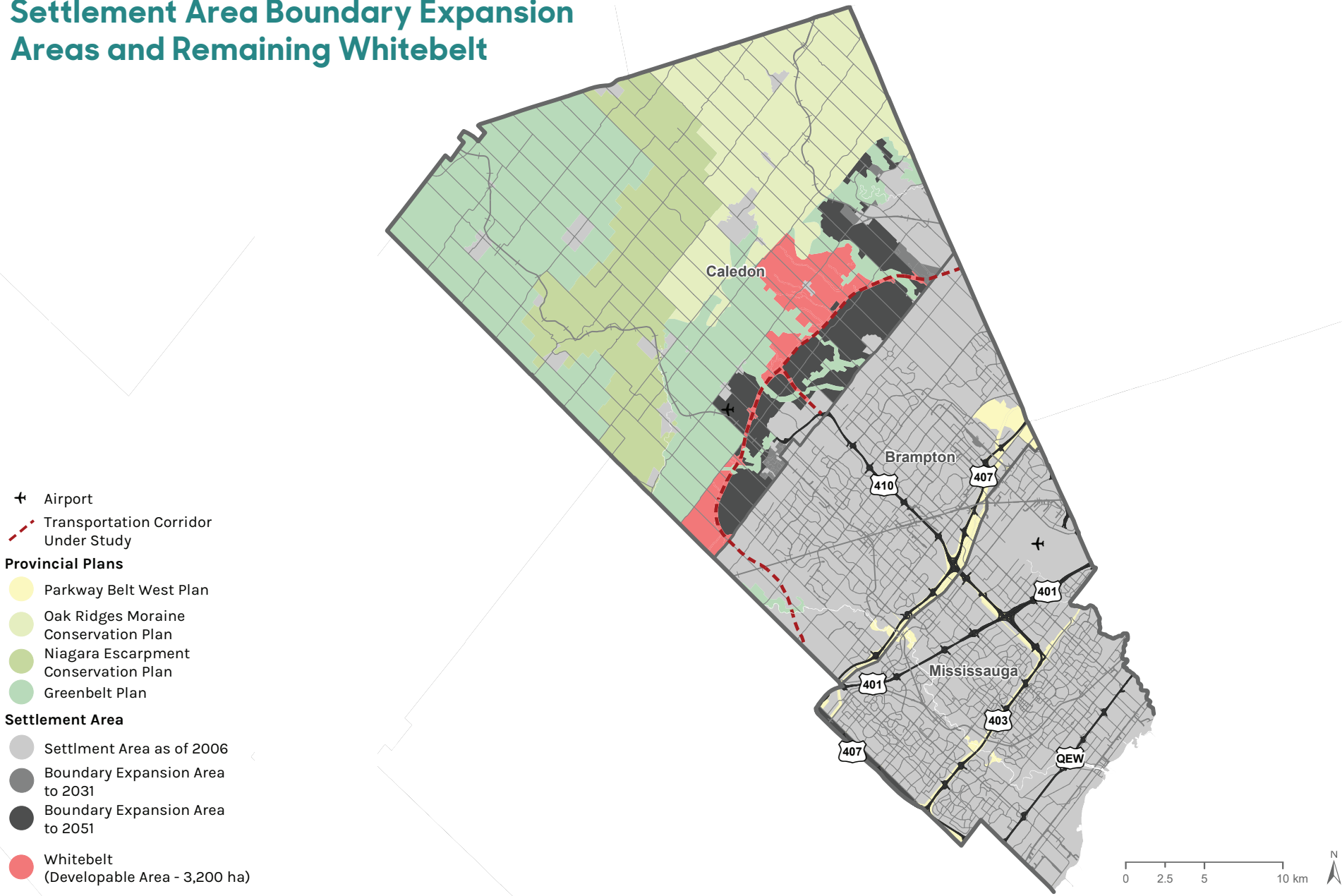
Transit Routes

- Existing GO Train Line
- LRT Under Construction
- Proposed LRT
- Existing BRT
- BRT Under Construction
- Proposed BRT

Note: Density by Census Dissemination Area

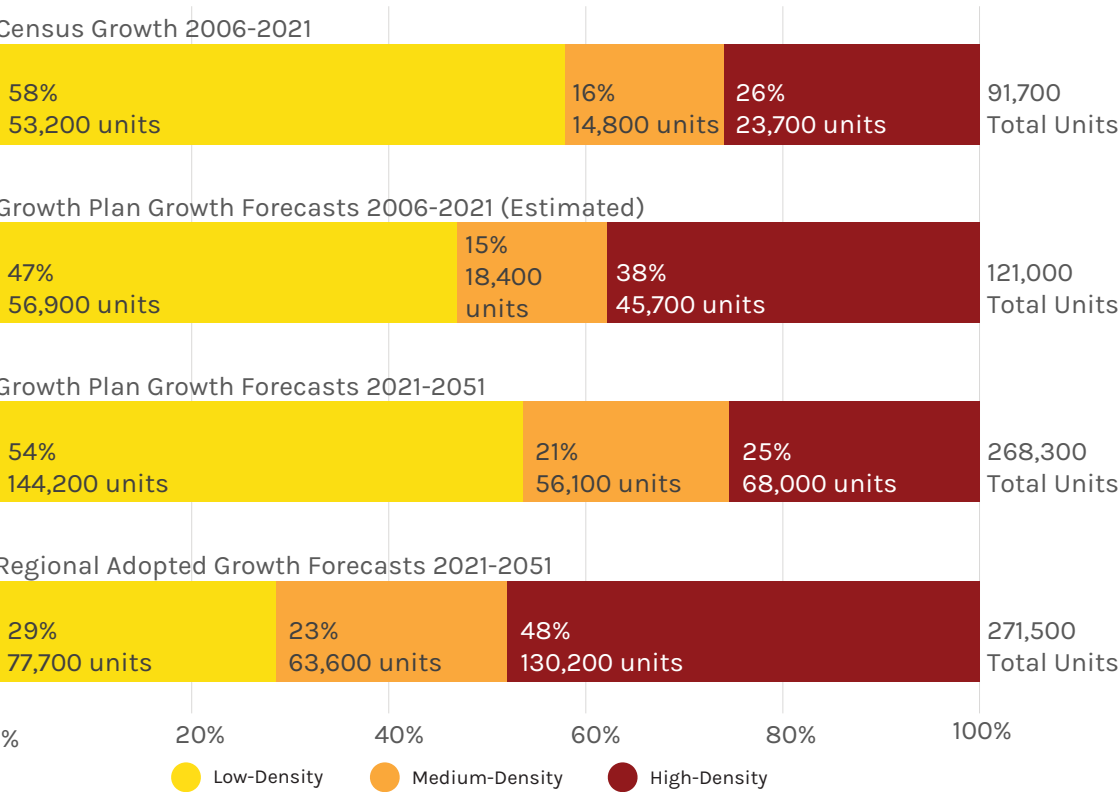


Settlement Area Boundary Expansion Areas and Remaining Whitebelt



Unit Growth/Forecasts and Land Needs Assessment Comparisons

Peel Region Unit Growth/Forecasts



Notes:
1. Adopted Official Plan unit growth forecasts based on the Land Needs Assessment scenario that supported the adopted Official Plan.
2. Values rounded to nearest 100.
3. Totals may not add up due to rounding.
4. See Appendix for full set of notes.

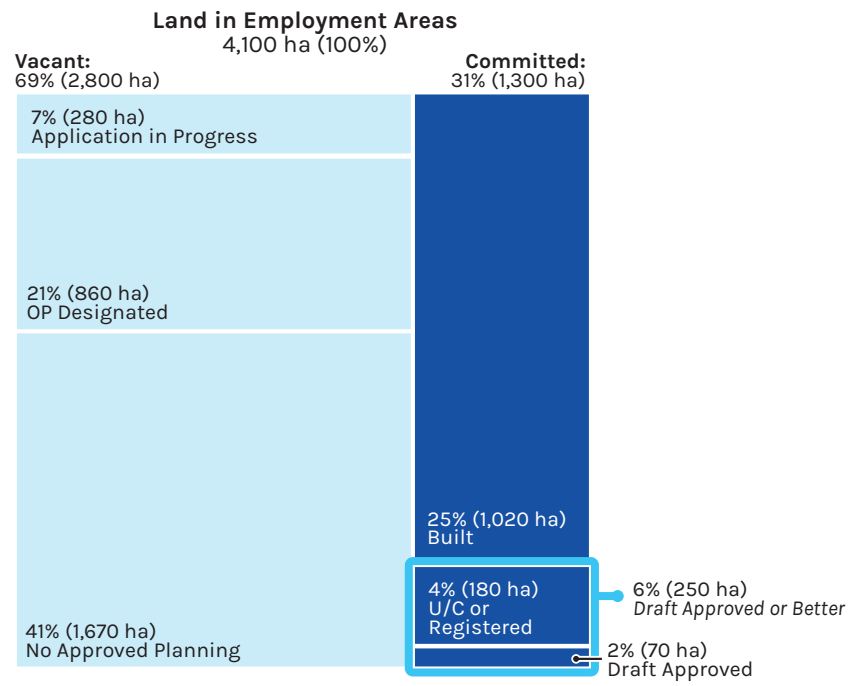
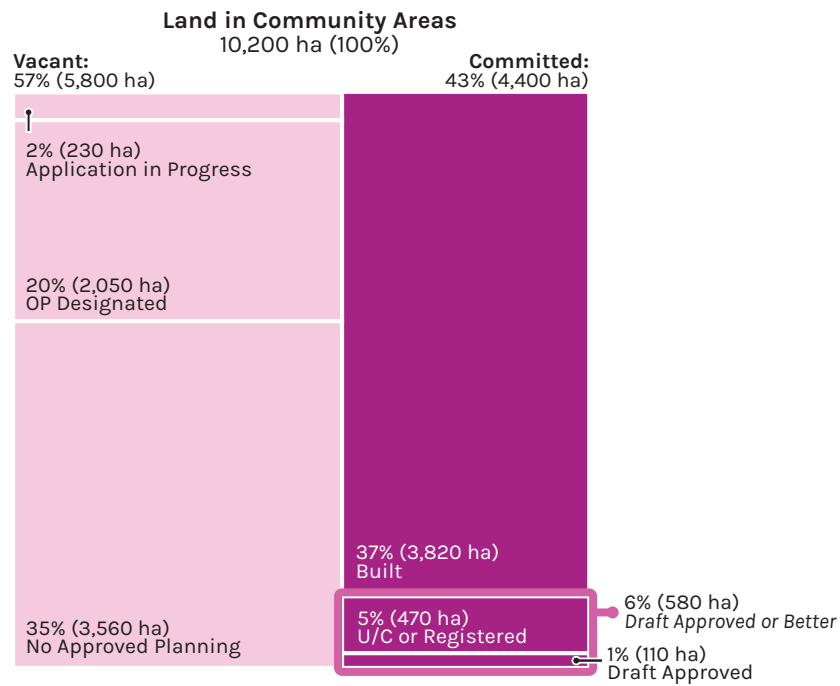
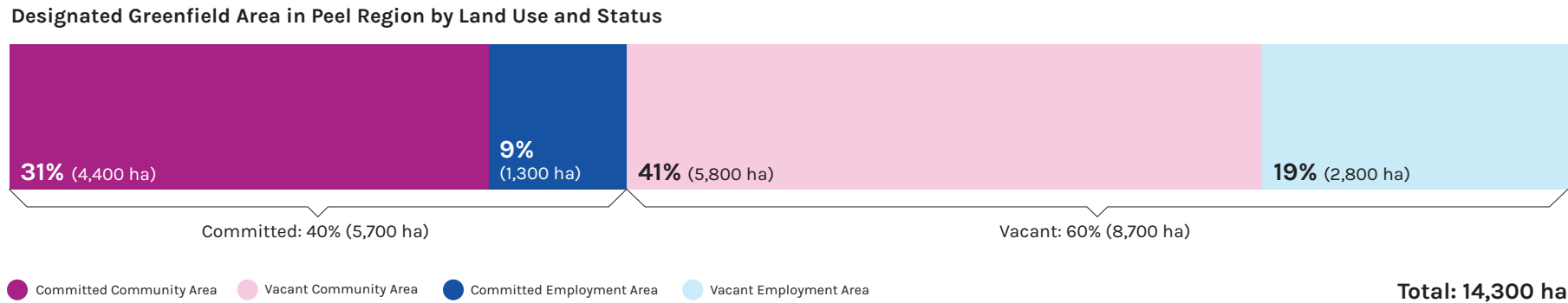
Comparisons

Census Growth vs. Growth Plan Growth Forecasts 2006-2021	
Shortfall (-) / Surplus (+)	
Low-Density	-3,700
Medium-Density	-3,600
High-Density	-22,000
Total Units	-29,300

Adopted Official Plan vs. Growth Plan Growth Forecasts 2021-2051	
Shortfall (-) / Surplus (+)	
Low-Density	-66,500
Medium-Density	+7,500
High-Density	+62,200
Total Units	+3,200

Regionally Adopted OP vs. Provincially Approved OP Settlement Area Boundary Expansion Area		
	Regionally Adopted	Provincially Approved
Community Area (ha)	2,900	3,800
Employment Area (ha)	1,500	1,800
Total SABE Area (ha)	4,400	5,500

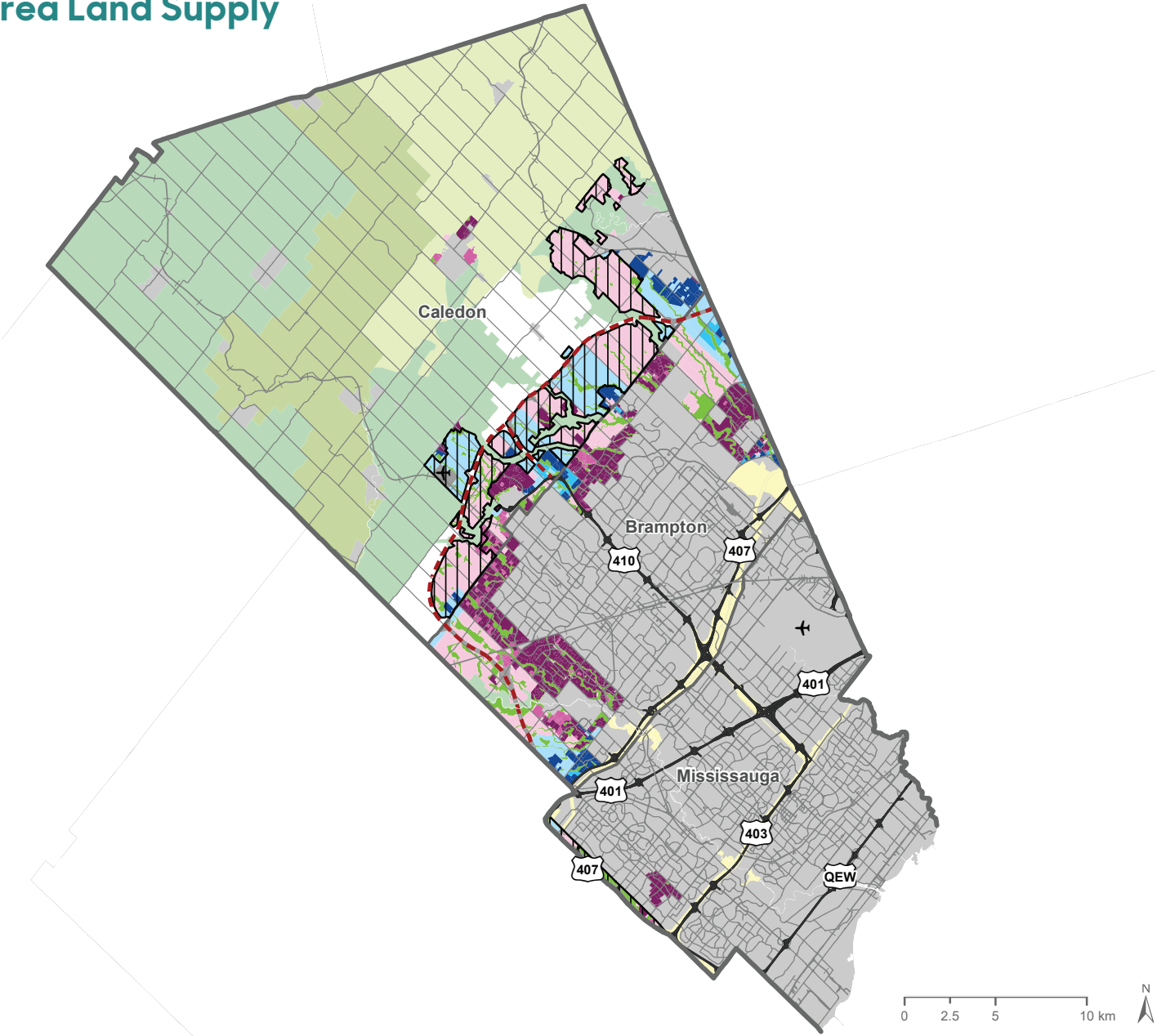
Detailed Desingated Greenfield Area Land Supply Breakdown



Note: Totals may not add up due to rounding.

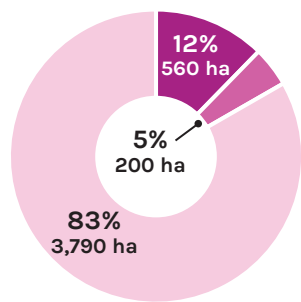
Designated Greenfield Area Land Supply

- PEEL
- Built-Up Area
 - Airport
 - Transportation Corridor Under Study
 - Provincial Plans**
 - Parkway Belt West Plan
 - Oak Ridges Moraine Conservation Plan
 - Niagara Escarpment Conservation Area
 - Greenbelt Plan
 - Designated Greenfield Areas**
 - Settlement Area
 - Boundary Expansion Area
 - Community Area**
 - Built
 - Draft Approved or Better
 - Vacant
 - Employment Area**
 - Built
 - Draft Approved or Better
 - Vacant
 - Non-Developable Area**
 - Environmental Feature / Cemetery
 - Major Infrastructure

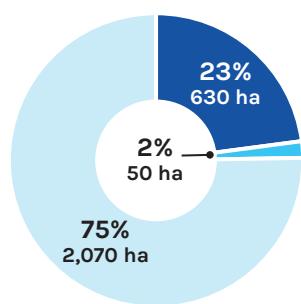


Town of Caledon

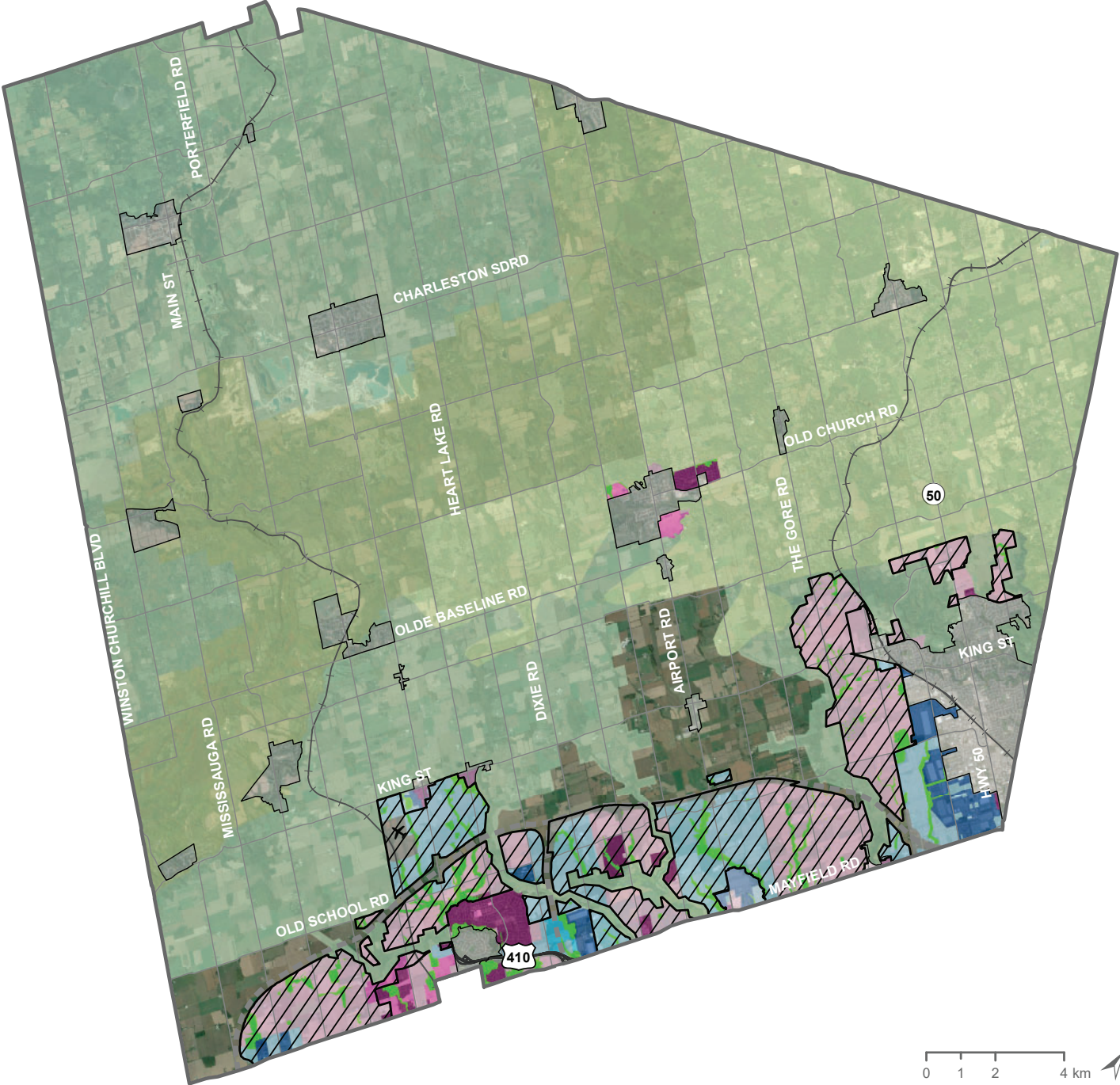
Community Area



Employment Area

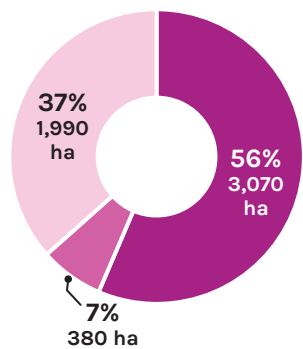


- Built
- Draft Approved or Better
- Vacant
- Settlement Area Boundary Expansion Area

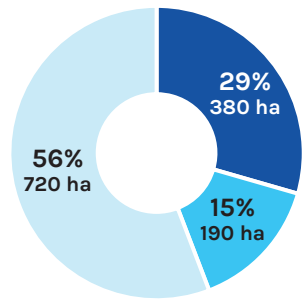


City of Brampton

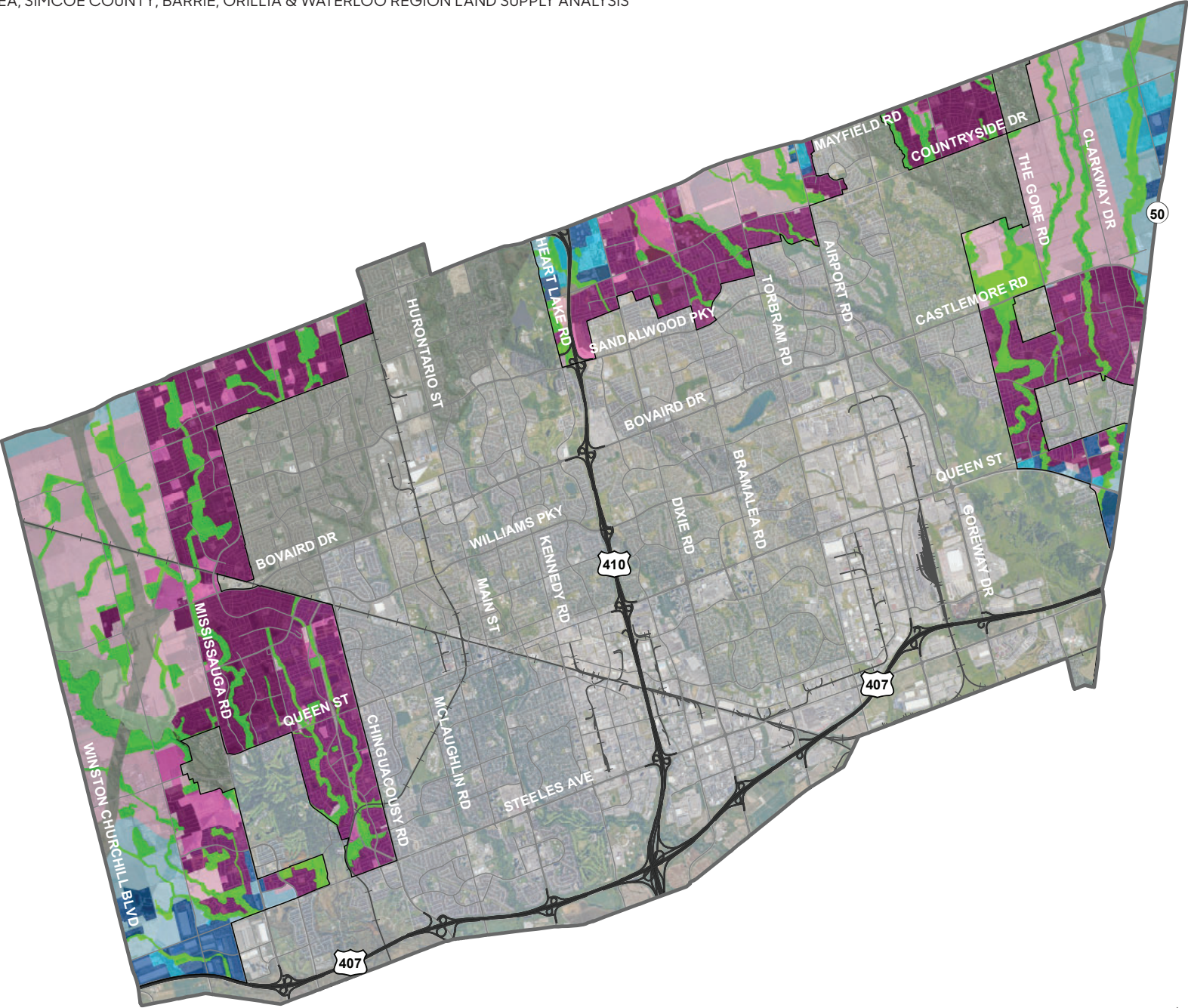
Community Area



Employment Area

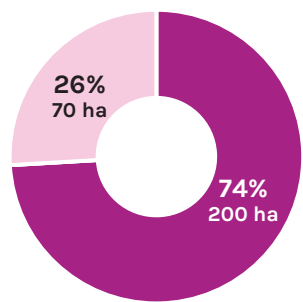


- Built
- Draft Approved or Better
- Vacant

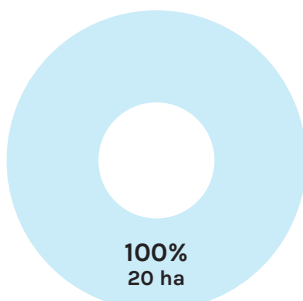


City of Mississauga

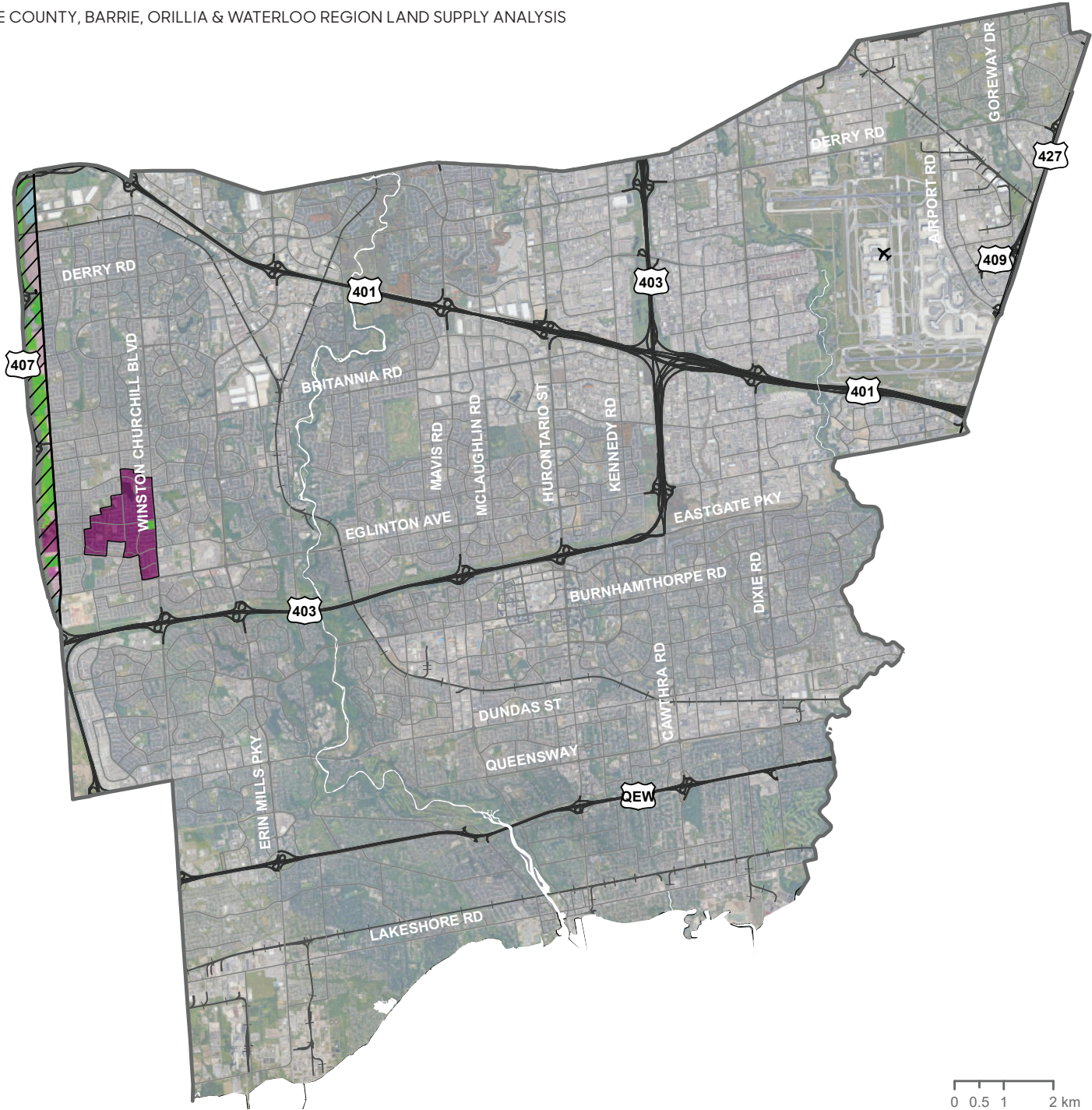
Community Area



Employment Area



- Built
- Draft Approved or Better
- Vacant
- Settlement Area Boundary Expansion Area



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