



# Volume 6: Preferred Directions and Recommendations





## Table of Contents

Executive Summary .....	4
Project Summary .....	4
Policy Framework .....	6
Planning Act .....	6
Provincial Policy Statement, 2020 and Draft PPS, 2023 .....	6
Comprehensive Review .....	8
Background .....	8
Growth Options .....	8
Option 1 (Base Case) .....	9
Option 2 (Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity) .....	9
Option 2B (Higher Growth and Allocations Aligned to Available Servicing Capacity) .....	9
Option 3 (Higher Growth and High Intensification) .....	9
Rural Areas in All Options .....	9
Residential Lands .....	14
Residential and Population Trends .....	14
Residential Land Needs .....	15
Employment Lands .....	15
Local Economy and Growth Trends .....	15
Employment Growth Allocations .....	16
Employment Areas and Vacant Lands .....	16
Employment Land Needs by Area .....	17
Employment Area Land Needs .....	17
Growth Option Evaluation .....	19
Watson and Associates Review .....	19
Evaluation Criteria and Tool .....	19
Analysis .....	20
Preferred Growth Scenario .....	21
Recommended Growth Option .....	22
Recommendations and Next Steps .....	25

Appendices: .....	27
Appendix A - Evaluation Framework - Growth Option Summary .....	27
Appendix B - Phase 2 Comprehensive Review: Growth Scenarios and Urban Land Needs Analysis, 2023 to 2048 prepared by Watson and Associates Economists Ltd, October 10, 2023 .....	27

## Table of Figures

Figure 1. Visual depiction of Option 1 .....	10
Figure 2. Visual depiction of Option 2A.....	11
Figure 3. Visual depiction of Option 2B.....	12
Figure 4. Visual depiction of Option 3 .....	13
Figure . Forecast Employment Area Land Needs (Demand Vs. Supply), 2023-2048 ....	17
Figure . Summary of New Residential Dwelling Units - Intensification and Greenfield Development (Urban Areas), 2018-2022 .....	21
Figure . Percent of Intensification by Urban Area, 2018-2022 .....	22
Figure 8. Evaluation Table of Recommended Growth Option and Comparative Options .....	23

## Executive Summary

The purpose of this technical paper is to provide a summary of the research and review completed as a part of the Growth management study, GROW Norfolk, completed to date, provide more detailed analysis of the most recently completed components and to ultimately review and evaluate the information to provide a recommended Growth option. The paper summarizes the most recent components of the **Grow Norfolk Study**: Phase 2 of the Comprehensive Review completed, in part by Watson and a Land Evaluation and Area Review and consolidates and provides recommendations regarding next steps based on the entirety of the works completed as a part of the project.

## Project Summary

In mid-2021, the “GROW Norfolk” Study was initiated as a multi-phase, multi-year project to review and provide new forecasts and recommendations for the next 25 years of Growth. The study results would culminate in an update to Norfolk’s Official Plan as part of a formal Amendment to conform to the Provincial Policy Statement, 2020 (PPS). The GROW Norfolk project forms a “municipal comprehensive review” under the current PPS. The study includes initiatives such as new population and employment forecasts, housing review, land evaluation area review (agricultural lands), land supply including intensification and greenfield, industrial lands review, Growth options and implications including macro-level infrastructure review, recommended policy amendments and mapping, and more.

The study consists of 4 phases:

- Phase 1: Project Initiation;
- Phase 2A: Policy Scan & Technical Reports;
- Phase 2B: Growth Projections;
- Phase 3: Opportunities & Options; and
- Phase 4: Preferred Direction and Recommendations.

Within these phases, the following key components have been undertaken to date:

- Phase 1: Terms of Reference and Project Initiation - June 2021
- Phase 1: Engagement Strategy - Summer 2021
- Phase 1: Land Evaluation Area Review Initiation and Initial Phase - Summer 2021-Summer 2022
- Phase 1-2: Internal, Agency and Provincial Ministry Working Group - Fall 2021-Summer 2022
- Phase 2A: Policy Review - Fall 2021/Winter 2022
- Phase 2A: Existing Community Profiles - Fall 2021
- Phase 2A: Growth Management Study Volume 1: Context Report - December 2021

- Phase 2B: Growth Management Study Volume 2: Norfolk County Comprehensive Review, Long-Term Growth Analysis (Watson & Associates Economists Ltd.) - December 2021
- Phase 2A: Growth Management Study Volume 3: Housing Technical Paper - February 2022
- Phase 2A-3: Long Term Growth Analysis & Infrastructure Review (Staff) - Spring-Summer 2022
- Phase 1-2: Advisory Committee Engagement - January 2022
- Phase 1-2: Public Open House, Housing Sessions: Additional Dwelling Units, Short-Term Rentals, Engagement Survey, Stakeholder Interviews - March-June 2022
- Phase 2A-4: Official Plan and Zoning Amendments: Additional Dwelling Units - September 2022
- Phase 2-3: Coordinated Provincial Ministry Meeting - September 2022
- Growth Study: Council Workshop Session - December 2022
- Land Evaluation Area Review: Consultant Phase - Fall 2022-Spring 2023
- Phase 3: Land Study Background, Vacant Land Inventory, Intensification Level Review, Industrial Land Inventory, Preliminary Settlement Boundary Review, and Data Systems (Staff) - Summer 2022-Winter 2023
- Phase 3: Norfolk County Comprehensive Review - Growth Scenarios and Land Needs (Watson) - Winter-Summer 2023
- Phase 3: Growth Management Study Volume 4: Residential Land Study and Options (Staff), including Norfolk County Comprehensive Review - Draft Growth Scenarios and Land Needs (Watson & Associates Economists Ltd.) - May 2023
- Phase 3: Public Information Centre: GROW Norfolk Study - Growth Options and Draft LEAR Study - August 2023
- Phase 3: Growth Management Study Volume 4B: Employment Lands (Staff), including Norfolk County Comprehensive Review - Draft Growth Scenarios and Land Needs: Employment (Watson & Associates Economists Ltd.) - October 2023
- Phase 3: Planning Advisory Committee Engagement - October 2023

## Policy Framework

### Planning Act

The *Planning Act* plays a crucial role in coordinating provincial interests with municipal planning, aiming for alignment with policies and plans. It empowers municipal councils to make decisions which consider a wide range of factors, including the protection of natural heritage, agricultural resources, infrastructure, and sustainability. These policy statements serve as guiding principles that planning decisions must adhere to.

The *Act*, in detail, outlines the framework for creating and amending Official Plans, Zoning By-laws, and other planning applications like subdivision plans, consents, and minor variances. It also empowers municipalities by allowing them to set policies related to additional residential units, garden suites, and inclusionary zoning. Moreover, it identifies provisions for community improvement areas and community benefits within local official plans. In addition, it gives municipalities the authority to require the conveyance of land for parkland or opt for a "cash-in-lieu" approach. Under Section 3, the Planning Act gives weight to the Provincial Policy Statement (PPS), which was most recently updated in 2020. Planning decisions shall be consistent with the policy statements and shall conform to provincial plans, or at a minimum, shall not conflict them. Specific policies of the PPS are discussed below.

One of the overarching themes of the *Planning Act* is the efficient utilization of land. It directs Ontario's municipalities to make prudent use of land, factoring in infrastructure requirements, sustainability, and the challenges posed by climate change. Additionally, it encourages a focus on long-term financial responsibility. These fundamental concepts will find their way into the objectives and principles of the GROW Norfolk study, influencing the county's Growth management strategies.

### Provincial Policy Statement, 2020 and Draft PPS, 2023

The 2020 Provincial Policy Statement (PPS) mandates that a comprehensive review is a prerequisite before any planning authority can establish a new settlement area, expand existing boundaries, or approve the conversion of employment lands. Comprehensive reviews are rigorously defined by the PPS as follows:

1. For policies 1.1.3.8, 1.1.3.9, and 1.3.2.4, comprehensive reviews encompass official plan reviews or amendments initiated by the planning authority. These reviews are based on population and employment projections, consider alternative Growth directions, and prioritize development within existing boundaries while safeguarding provincial interests. They also integrate infrastructure planning and financial viability, ensuring water quality and capacity meet requirements, sewage and water services are provided per policy 1.6.6, and address cross-jurisdictional issues.

2. For policy 1.1.6, comprehensive reviews address long-term population projections, infrastructure needs, and related concerns. They confirm that development lands do not include specialty crop areas per policy 2.3.2 and consider cross-jurisdictional aspects.

Consideration of settlement area expansions and protected employment lands are to occur as part of a comprehensive review.

GROW Norfolk aligns with the PPS's definition of a comprehensive review. The study involves then preparation of new population and employment projections over a 25-year planning horizon; examines the existing land supply (both intensification and greenfield) and compares to forecasted Growth; reviews the existing inventory and the forecasted need for industrial employment land; identifies and examines alternate Growth options; and provides recommendations for prioritizing the approach to future development. Furthermore, the study integrates long-term infrastructure system planning to ensure water and wastewater availability, all while maintaining financial viability for Norfolk County. The study's level of detail corresponds with the complexity and scale of the settlement boundary or development proposal, in compliance with the PPS requirements.

In April of 2023, the Province of Ontario released a draft PPS, 2023. The proposed P.P.S., 2023 has been identified to be intended to simplify and integrate existing provincial policies (A Place to Grow: Growth Plan for the Greater Golden Horseshoe and the P.P.S., 2020) while providing municipalities and the Province with greater flexibility to deliver on housing objectives. A key emphasis of the proposed P.P.S., 2023 is its recognition that the approach to achieving housing outcomes may differ from one municipality to another. As a result, it moves away from a prescriptive guideline approach to Growth forecasting and urban land needs assessment.

According to the proposed PPS, 2023, during each Official Plan update, sufficient land must be allocated to meet a suitable range of land uses to address projected needs for a minimum of 25 years. In contrast, the previous PPS required municipalities to accommodate projected needs only up to 25 years. Additionally, there are no restrictions on designating Employment Area uses beyond a 25-year horizon. While the PPS, 2020 allowed for the long-term protection planning of Employment Areas beyond a 25-year horizon, it did not permit the designation of land beyond that same horizon.

Largely consistent with the P.P.S, 2020, the proposed PPS, 2023 still mandates planning authorities to maintain, at all times, the capability to accommodate residential Growth for at least 15 years through lands designated and available for residential development. It also stipulates that in areas where new development is to take place, planning authorities must maintain, at all times, land with servicing capacity sufficient to provide a three-year supply of residential units through lands suitably zoned. This supply includes units in draft-approved or registered plans.

It should be noted that the draft PPS, 2023 has not yet been formally put into place and the GROW Norfolk project was initiated and continues to proceed under the guidance and in conformity with the Provincial Policy Statement, 2020. It is expected that due to the nature of this municipal comprehensive review that, pending final policies, it should provide sufficient analysis and justification to support settlement boundary and employment land considerations under any updated directions of a new PPS.

## Comprehensive Review

### Background

Norfolk County retained the services of Watson & Associates Economists Ltd. to assist in the GROW Norfolk project. This included the preparation of new long-term population, household and employment forecasts and allocations to the year 2051. The initial Watson report entitled: Norfolk County Comprehensive Review Growth Analysis was completed as part of Phase 2 of the project, and coincided with staff's preparation of the overall Volume 1 - Context Report at the same time.

As part of Phase 3 of the project (Opportunities and Options), Watson has prepared a Comprehensive Review: Growth Scenarios and Urban Land Needs. This is the second component of the Comprehensive review completed by Watson. This forms part of a comprehensive review studying the County's overall land supply and potential future Growth scenarios as part of an Official Plan provincial policy conformity amendment.

Phase 1 of the Comprehensive Review assessed a range of demographic and economic drivers to arrive at three growth scenarios for Norfolk County's future: a low, medium, and high growth scenario. Under the low scenario, it was assumed that Norfolk County's permanent population base would grow at an average annual rate of 0.7% per year. Accordingly, under this scenario the population would increase from 2016 to 2051 by 18,500. The medium growth scenario forecasted growth at 0.8%. This would result in an expected population of 88,800 by 2051, or an increase of approximately 22,400 from 2016. This was considered the reference scenario, where the population would grow marginally in the latter half of the forecast period due to aging. As a reference scenario this scenario is still well above the historical growth rate of 0.3% achieved in Norfolk County from 2001-2016. The final growth scenario was considered the high scenario with an annual growth rate of 1.0% per year. Under this scenario, the population would grow by 26,300 persons, bringing the population to approximately 92,700 by 2051. In May of 2023, Council-in-Committee provided direction to staff in regard to using the High Growth Scenario for the continuation of the project.

### Growth Options

Using the reference and high growth scenarios as data points, Watson and Norfolk identified four (4) potential growth allocations options for the County to pursue (for

the purposes of this report, references to the term “allocation” are not at all referencing servicing allocations, but are referring to the allocation of the projected population and employment growth to a particular area):

#### Option 1 (Base Case)

Option 1 assumes the Medium Growth Scenario and allocates population and employment generally in accordance with past trends and housing supply opportunities within the County. Option 1 is not recommended for further consideration

#### Option 2 (Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity)

Option 2A is based on the high Growth scenario. The intensification target assumed for this option is aligned with the County’s current O.P. at 25% and follows a similar housing mix as Option 1. Allocations by urban settlement area take into consideration land availability as well as proposed servicing capacity (including all proposed upgrades/expansions) according to the County’s Servicing Monitoring Report for Water and Wastewater, and the information on Inter Urban Water Supply timelines.

#### Option 2B (Higher Growth and Allocations Aligned to Available Servicing Capacity)

Option 2B is premised on similar parameters as Option 2A however the growth allocations in this option are further focused towards the urban settlement which have available municipal water and wastewater servicing capacity. Option 2B allocates urban growth in the areas that have sufficient available water/wastewater capacity (Delhi, Simcoe and Waterford), and assumes lower growth in Port Dover and Port Rowan where there is a need for servicing upgrades and expansions.

#### Option 3 (Higher Growth and High Intensification)

Option 3 assumes a similar growth allocation to Option 2B under the High Growth Scenario but assumes a higher intensification rate of 35%. Accordingly, the housing mix by structure type under Option 3 is shifted further towards medium- and high-density forms. The allocation to the County’s rural settlement areas and remaining rural areas is similar to Options 1 and 2B.

#### Rural Areas in All Options

In all four of the proposed options, the number of units allocated to the County’s rural settlement areas remains the same. 800 new housing units have been allocated to the rural areas of Norfolk within settlement areas for development.

Below is a visual representation of the Growth options outlined above.

Figure 1. Visual depiction of Option 1  
**Option 1 (Base Case)**

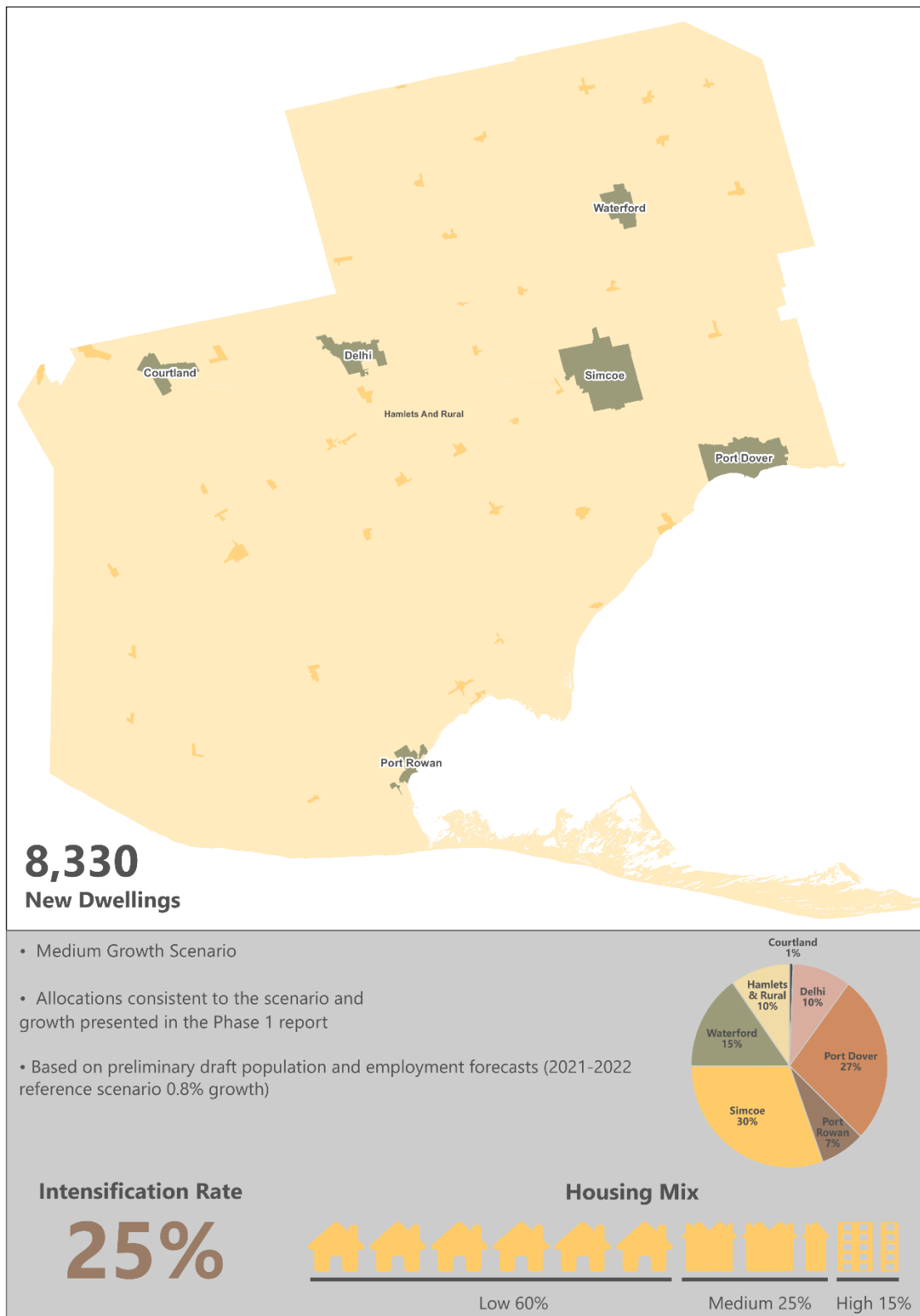


Figure 2. Visual depiction of Option 2A

Option 2A (Growth Allocations Aligned to Available Land & Planned Servicing Capacity)

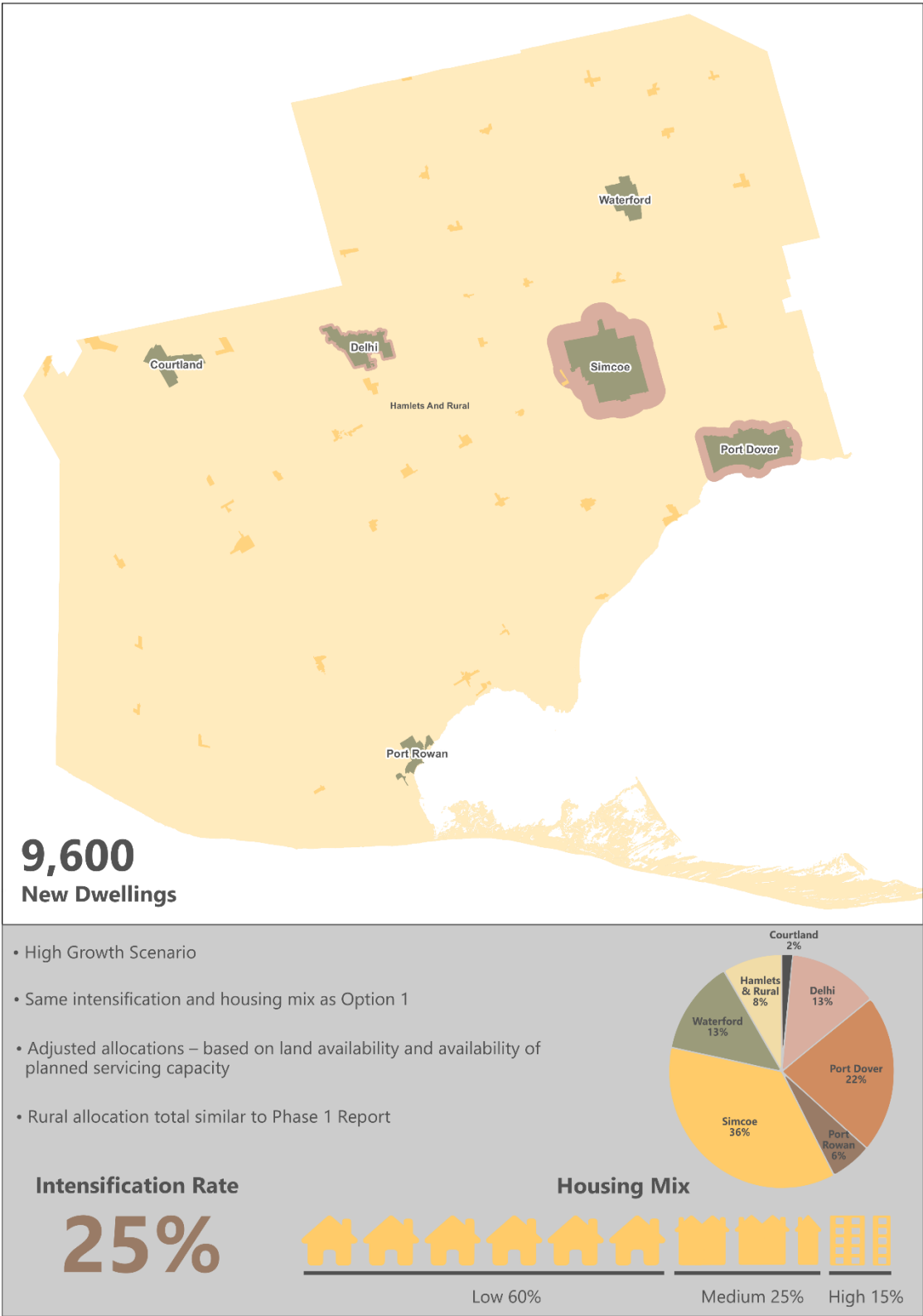


Figure 3. Visual depiction of Option 2B

### Option 2B (Growth Allocations Aligned Urban Areas and Available Servicing Capacity)

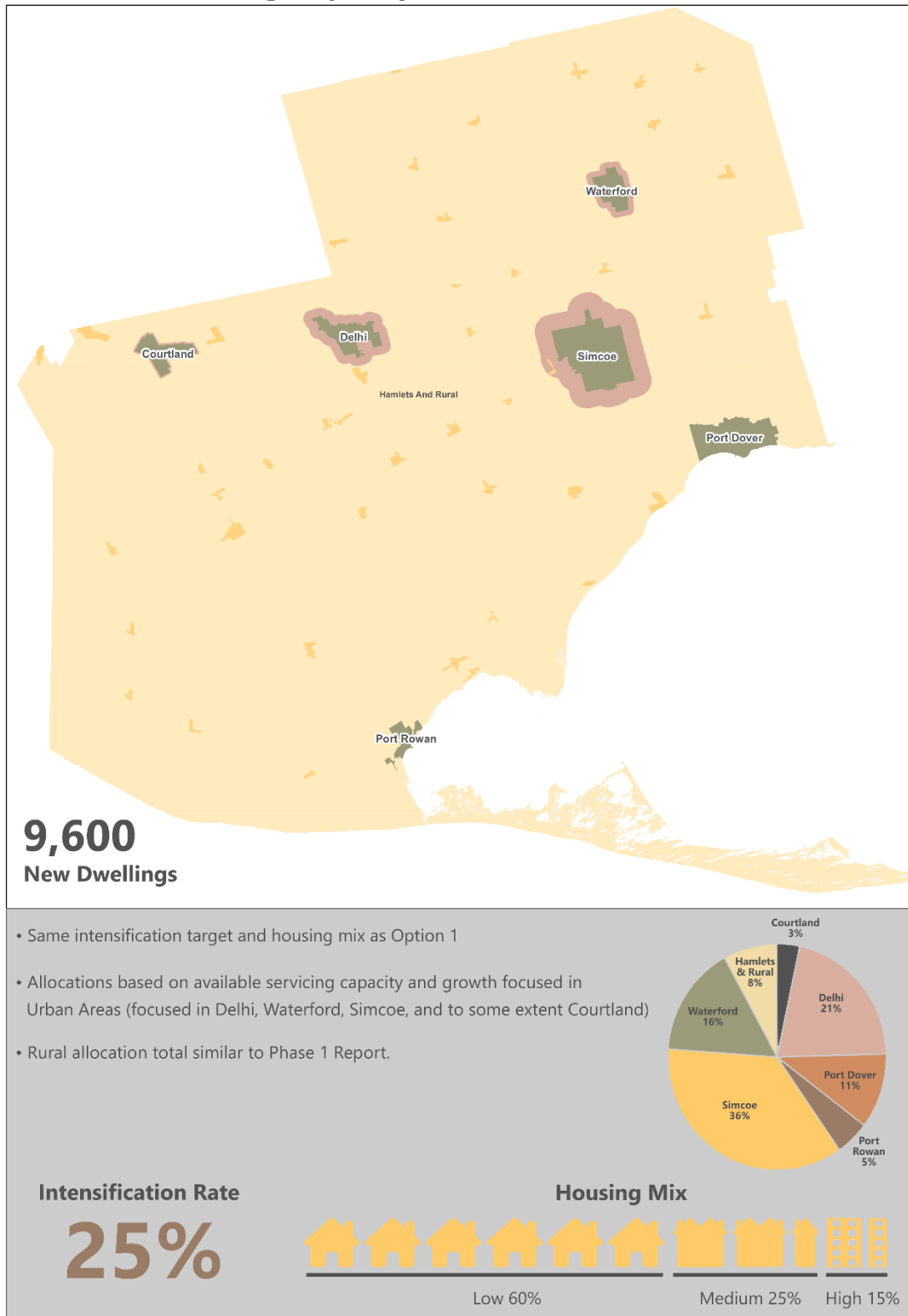
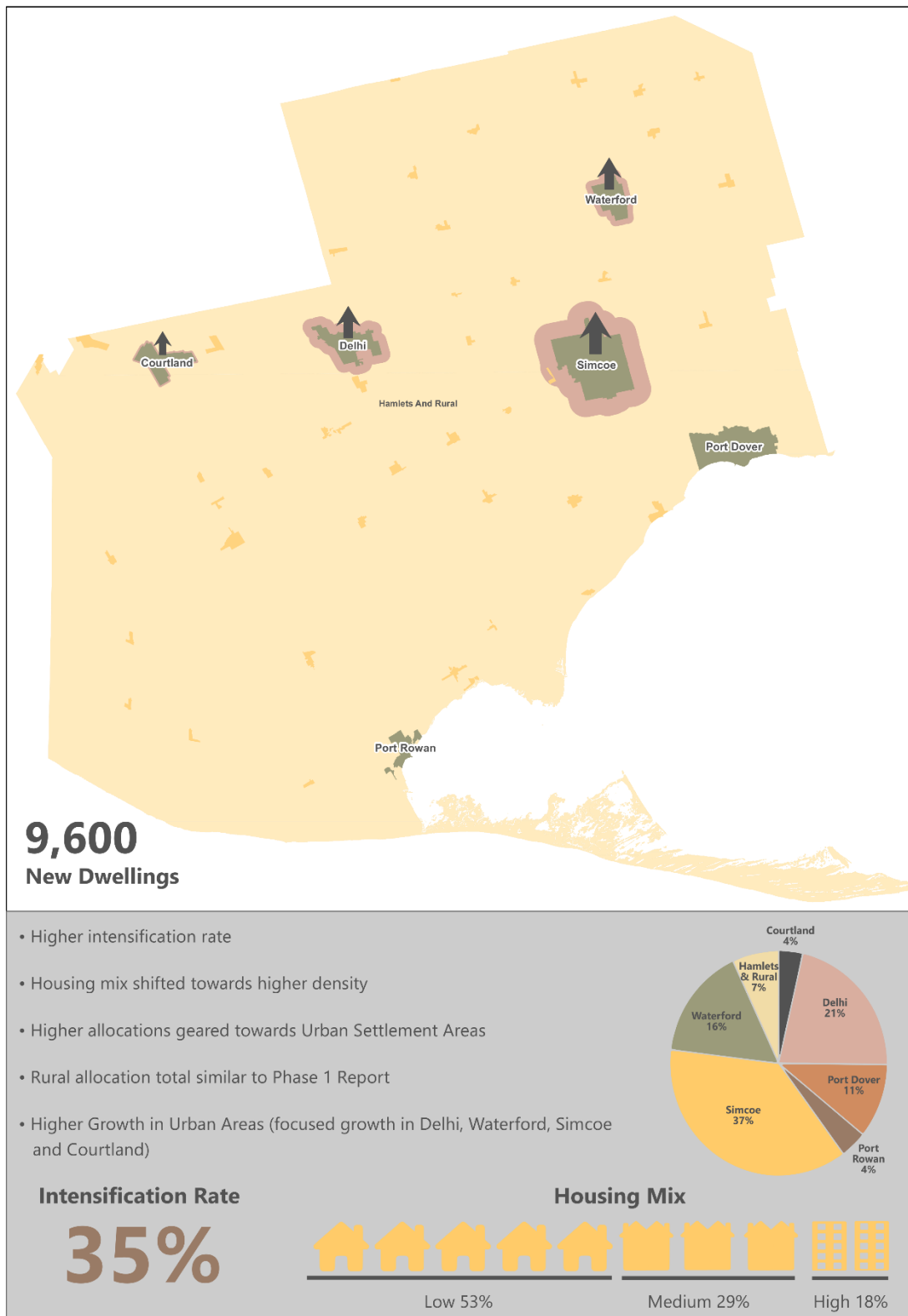


Figure 4. Visual depiction of Option 3

### Option 3 (Higher Growth & High Intensification)



## Residential Lands

### Residential and Population Trends

Over the last two decades, Norfolk has witnessed uneven population growth, largely influenced by fluctuations in regional economic conditions. From 2001 to 2016, Norfolk County experienced a moderate annual population growth rate of 0.3%. However, since 2016, there has been a significant increase in population growth, reaching an estimated annual rate of 1.1% from 2016-2021, driven by consistent net migration across all major demographic groups, including children, adults, and seniors. This surge in population has generated a demand for new housing construction throughout the County. Recent trends suggest that the relatively robust annual construction of new housing is expected to persist over the long-term planning horizon.

Traditionally, residential development in Norfolk County has been heavily concentrated in low-density housing forms, such as single-family homes and semi-detached units. However, from 2016 to 2021 and especially in recent development approvals through 2022 and 2023, the County has seen a shift toward a higher proportion of medium-density and high-density housing forms, which now make up approximately one-third of all new housing construction in terms of units.

Norfolk County has an older-than-average population base, and it is aging slightly faster than the province as a whole. As the Baby Boom generation in the County continues to age, the 75+ age group is expected to be the fastest-growing segment of the population. While strong net migration within the 55+ age group brings economic development opportunities to the region, the aging population also poses challenges. It is likely to slow down long-term population growth due to declining natural increase (births minus deaths), making the County more reliant on net migration for population growth. Additionally, an aging labor force is anticipated to impact long-term economic growth through decreased labor force participation and potential labor shortages.

It's important to note that forecasted population growth rates are not expected to be uniform across the County's urban and rural areas. Less developed settlement and rural areas are projected to have relatively slower population growth in places with limited new housing construction. Conversely, the aging population will put development pressure on more developed urban areas with available municipal servicing capacity. This includes the need for seniors' housing and other housing forms suitable for older adults, such as assisted living, affordable housing, and adult lifestyle housing, which may not be available or feasible in smaller communities or rural areas.

Additionally, efforts at various levels of government, including the federal, could have impacts on populations not only in Norfolk but in Ontario and Canada more generally. For example, an increase in immigration targets in recent years. Norfolk

will require a noticeable increase in net migration to achieve the high growth scenario population numbers.

### Residential Land Needs

The analysis identified greenfield as well as intensification opportunities and housing unit potential within the existing designated residential lands within the County. Based on the assessment, the County has a supply potential of 9,316 units of which 1,212 units (13%) are within built boundary or intensification areas and the remaining 8,104 units (87%) are within greenfield areas.

Through the work completed as part of this project, Watson and Associated have identified what they believe to be the residential land need in Norfolk for the next 25 years. Land within the settlement area boundary was evaluated in all settlement areas, and it was identified that the County has sufficient supply of designated, vacant, greenfield or intensification redevelopment lands at the County-wide level to accommodate anticipated housing forecasts over the next 25 years. It was noted, however, that there is a deficiency in Delhi, Waterford and Simcoe depending on the Growth Option that is considered utilizing the High Growth (forecast) Scenario. For Delhi, an urban residential land supply deficit ranging between 27 to 77 gross developable ha has been calculated. For Waterford, a deficit ranging between 19 to 34 gross developable ha has been calculated. For Courtland, an urban residential land supply deficit of approximately 8 to 9 gross developable ha has been calculated.

## Employment Lands

### Local Economy and Growth Trends

Norfolk County's long-term population and employment growth potential is largely tied to employment opportunities with the County and surrounding market area (i.e. commuter-shed).

The employment base can be grouped into two broad categories - export-based sectors and community-based sectors. The latter primarily refers to local population serving employment. Export-based sectors are comprised of geographically clustered industries which produce goods or services that reach markets outside the community such as manufacturing, research and development, as well as other knowledge-based industries. Ultimately, the aggregate indicators of the regional economic performance are determined in large measure by the competitiveness of their industry clusters.

As of 2023, the estimated employment base in Norfolk County is approximately 29,500 jobs. Over half of those jobs are within the commercial and institutional sectors. 16% falls in the industrial sector, while no fixed place of work and work at home employment with 15% and 11%. Most employment sectors, particularly health care and social assistance, accommodation and food services, as well as manufacturing, have experienced positive employment growth. A few sectors, such as transportation and warehousing, utilities and agriculture sectors have experienced a loss in overall employment, though to a small degree.

## Employment Growth Allocations

As noted in regard to the residential growth, three (3) scenarios were identified for growth in Norfolk County: a low, medium and high growth forecast scenario. Under the Medium Growth Scenario, Norfolk County's employment is forecasted to grow at an annual rate of approximately 0.8%. This represents an average annual growth rate that is well above the historical growth rate of 0.3% achieved within Norfolk County from 2001 to 2016. Comparatively, under the High Growth Scenario, the County's employment is forecast to grow at an average annual rate of 1.3% per year. Under this scenario, the employment of Norfolk County is anticipated to Grow by approximately 8,700 persons, increasing from 25,400 in 2016 to 34,100 by 2051.

The highest share of employment growth (30%) is forecasted in the commercial / population related employment sectors. The industrial sector is forecast to have a modest growth and about 15% of the overall county-wide employment forecast. It is noted that the industrial employment growth will have synergies with the broader regional economy, however, municipalities located along the Highway 401 and 403 corridors are anticipated to accommodate a significantly larger share of industrial employment in the surrounding region relative to Norfolk. It is expected that following the last several years of pandemic and major shifts in employment trends that composition in the future employment forecasts may change and will need to be tracked.

## Employment Areas and Vacant Lands

Norfolk's Official Plan identifies two designations of employment areas: Protected Industrial and Industrial designated lands. The Protected Industrial areas are lands with high visual profile and accessibility and are generally comprised of industrial, employment, accessory commercial and related uses. Industrial Designation applies to older industrial sites that are under-utilized and poorly situated to attract new industrial investment. Courtland, Delhi, Simcoe and Waterford all currently have employment areas of varying potential. As noted in a previous section, Norfolk County is responsible for ensuring there is available lands for employment area development. Norfolk County currently has approximately 187 gross ha of vacant, designated industrial land. Additionally, some intensification is expected to occur on existing but underutilized lands. This could take the form of expansion or redevelopment. Watson identifies that there is approximately 4.4 ha or about 10 sites that are underutilized that are expected to absorb about 5% of the employment growth as intensification.

Of the 187 ha that were identified, approximately 126 ha are considered available and developable when existing constraints are taken into account. The total net vacant, developable urban industrial land identified within the County, approximately 34% or 43 ha is located in the Courtland, followed by 23% in Delhi, 42% in Simcoe and 1% in Waterford. The remaining urban settlement areas have a limited supply of available vacant employment lands.

## Employment Land Needs by Area

Over the 25-year planning horizon, the County's Employment Areas are anticipated to accommodate approximately 15% of the County's total urban employment growth, totaling about 1,000 employees between 2023 and 2048. Comparing County's supply of designated, developable vacant Employment Areas by urban settlement area against forecast employment land demand generates a County-wide deficit of 52 gross ha (129 gross acres) by 2048. This includes a market contingency of an additional 15% of the land requirement to ensure the County has the flexibility to accommodate a range of employment uses. It is noted that the additional Employment Area lands are specifically needed in Delhi, Simcoe and Waterford, while existing supply is sufficient in Courtland, Port Dover and Port Rowan.

*Figure 5. Forecast Employment Area Land Needs (Demand Vs. Supply), 2023-2048*

Area	Total Employment on Employment Lands	Employment Less Intensification (5%)	Density (Jobs / net ha)	Employment Area Land Demand (Net ha) with market contingency	Employment Area Land Supply (Net ha)	Land Need (Net ha)	Land Need (Gross ha)
Courtland	118	112	6	22	43	+21	No Deficit
Delhi	271	257	8	37	30	-7	-10
Port Dover	0	0	-	0	0	0	No Deficit
Port Rowan	0	0	-	0	0	0	No Deficit
Simcoe	507	482	8	69	53	-16	-22
Waterford	104	99	7	16	1	-15	-20
<b>Total</b>	<b>1000</b>	<b>950</b>		<b>125</b>	<b>126</b>	<b>-18</b>	<b>-52</b>

## Employment Area Land Needs

Based on the assessment of macro-economic and regional growth trends and drivers, Watson and Associates recommends that the High Growth Scenario is utilized as the County's employment growth forecast for long-range planning purposes for the County.

In accordance with the County's calculated supply of designated, developable vacant Employment Areas located in urban settlement areas and forecast demand for these lands, a County-wide deficit of 52 gross ha (129 gross acres) has been identified by 2048. For Delhi, Simcoe and Waterford an urban employment land supply deficit of 10, 22, and 20 gross ha has been calculated, respectively. Courtland could have a surplus of 21 net ha of urban employment land. It is also noted that due to the absence or very limited amount of industrial land in Port Dover and Port Rowan, these settlement areas were not forecasted to accommodate significant industrial employment growth over the forecast horizon as there are no lands available;

however, this may be a consideration moving forward when looking at appropriate locations for future employment land within the County and considering complete communities.

## Growth Option Evaluation

### Watson and Associates Review

Through their evaluation, Watson and Associates have identified Option 2B (Higher Growth and Allocations Aligned to Available Servicing Capacity) as a candidate for the County to consider. Their report indicates that Option 2B represents an appropriate target of housing development through residential greenfield and intensification growth while maximizing existing water and wastewater capacity in Delhi, Simcoe and Waterford. They further recommend that Growth Option 2B be utilized for the consideration of employment growth as well given the correlation with industrial land needs for Delhi, Waterford and Simcoe.

### Evaluation Criteria and Tool

In addition to assessing the growth options based on the original guiding growth management themes of the Grow Norfolk Study (see Volume 1: Context Report), an evaluation tool was utilized to conduct a high-level analysis and implications of the various Growth Options using the following criteria:

1. Complete Communities
2. Economic Growth
3. Conservation of Prime Agricultural Land:
4. Hard Infrastructure:... Water, Wastewater, Storm, Transportation, Utilities
5. Community Infrastructure:... Parks, Schools, Institutional, Cultural Heritage
6. Conservation of Natural Heritage Resources
7. Fiscal Responsibility
8. Promotion of Intensification

To assist with the criterion of “Conservation of Prime Agricultural Land” and for consistency with the PPS policies along with conformity to Norfolk Official Plan policies for settlement area considerations, a Land Evaluation and Area Review (LEAR) Study was conducted as part of the Grow Norfolk Study work (see Volume #6), by Colville Consulting Inc. A LEAR study is a tool developed by OMAFRA to conduct a quantitative analysis to “evaluate the relative importance of lands for agriculture based on the land’s inherent characteristics and other factors affecting agricultural potential (OMAFRA, 2021). The resulting parcel-based evaluation from the LEAR study provides valuable information in a map-based format which compliments the comprehensive review data provided by Watson by providing valuable insight on the agricultural potential surrounding existing settlement areas. Under the Planning Act, the protection of the agricultural resources of the Province is noted as a matter of provincial interest, furthermore it is well known that Agricultural production contributes significantly to the County’s economic vitality. Norfolk County’s Official Plan identifies that the County may “prohibit the expansion of urban, hamlet and

resort areas on to prime agricultural lands without a comprehensive review indicating the need for such expansion and demonstrating that lower quality lands are not available or practical for such expansion.” The LEAR data was a valuable component in the preliminary review of the Growth Options and will become even more crucial in the evaluation of the appropriateness of any urban boundary expansion requests as well as the identification of prime agricultural areas and specialty crop areas towards further protecting lands in this important sector.

To assist with the criterion of ‘Hard Infrastructure’ and consistency with PPS, 2020 and conformity with Official Plan policies, previous Integrated Sustainability Master Plan (ISMP 2018) information was utilized, along with significant work undertaken on the Inter-Urban Water Supply initiative, updated analysis of revised Watson forecasts compared to existing and planned water and wastewater treatment plant capacities, high-level modeling/infrastructure review of potential growth option implications and “red-flag review” of the water and wastewater systems through the County’s consultant, and additional staff review. The County does not have significant information or modeling available for scenario review regarding stormwater nor transportation at this time. The new growth forecasts from this study can be utilized in the upcoming ISMP updates (water, wastewater, storm, transportation, etc). Further review of potential implications to all of these systems will be required through that update along with the next steps of the detailed review of settlement boundaries and employment lands as part of the Official Plan Amendment to implement the Growth study. More detailed review would then be done as part of Master Servicing Strategies with the Urban Area Land Use Plans to more specifically identify any capacity or conveyance issues or growth-related infrastructure improvements that may be needed in the future (which could then be considered in future Development Charges Background Study/Bylaw updates).

### Analysis

Using the application of the evaluation tool in relation to the proposed boundary expansion sites, in the context of the growth options, key areas included the access to infrastructure, including water and wastewater, but also other services such as existing commercial, recreational, and employment areas. The surrounding land uses, such as key prime agricultural areas including agricultural areas with significant financial investments to the agricultural product; as well as natural and cultural heritage features all assisted in supporting the overall recommendation of focusing growth around urban settlement areas.

Areas with lower scores show servicing constraints, less soft infrastructure, and surrounding prime and active agricultural areas. For any growth option it could have the implication of needing more school and park space with the preference to focus growth in a few key areas versus spreading out everywhere and potentially needed more school and parks in more locations which would have financial and other impacts. The overall analysis is contained within Appendix A: Evaluation Criteria and Tool - Growth Option Summary.

## Preferred Growth Scenario

Following review of the Growth Scenarios and Urban Land Needs Analysis provided by Watson (Attachment B to this report), in addition to the evaluation and analysis work completed through the project team, the input of corresponding studies of the GROW Norfolk project, provincial and Official Plan policy review, a number of considerations have emerged. These include:

- Norfolk is a large, geographic area with a significant number of communities that if they all experience increased growth at similar times could put pressures and challenges on hard and community infrastructure and financial affordability of the municipality in the long-run. In addition to the numerous urban areas, this could also include growth pressures for large numbers of hamlet areas as well.
- Norfolk needs a wider range of housing and employment options considering our demographics and forecasted growth (and transportation choice).
- Norfolk is expending significant investment in updating or replacing aging or inadequate infrastructure for the long-term (the most financially significant in terms of Norfolk's history). The direction is to more effectively and efficiently utilize the existing and planned infrastructure.
- Norfolk has actually already achieved a relatively high rate of residential intensification, which achieves many growth management / "smart growth" principles and typically is considered more environmentally, economically and socially beneficial. (see more below)

Existing Official Plan policies (2018) identify that 25 percent of residential growth (new dwelling units) in the Urban Areas should be accommodated through infill, intensification and redevelopment. The County has been successful in achieving or surpassing the 25% intensification rate from 2018 to 2022. As noted in Volume 4: Land Study and Options and the figure below, the County has maintained an average annual rate of 42.5% intensification for the past 5 years.

*Figure 6. Summary of New Residential Dwelling Units - Intensification and Greenfield Development (Urban Areas), 2018-2022*

Issued Year	Intensification	Greenfield	Total	Intensification %
2018	98	73	171	57.3
2019	186	143	329	56.5
2020	103	196	299	34.4
2021	93	139	232	40.1
2022	27	135	162	16.7
<b>Total</b>	<b>507</b>	<b>686</b>	<b>1193</b>	<b>42.5</b>

*Figure 7. Percent of Intensification by Urban Area, 2018-2022*

Community	Intensification (2018-2022)
Delhi	40%
Simcoe	39%
Port Dover	54%
Port Rowan	53%
Waterford	36%

Encouraging intensification through an increased target will in turn also promote better utilization of the lands and increase the chances of medium and high density housing opportunities. Looking into the future, there are a number of development applications with preliminary approvals for new apartment buildings, townhouses or stacked townhouses in most Urban Areas (Simcoe, Port Dover, Delhi, Waterford) which should result in an increase and continuation of a fairly steady Intensification level into the next 5 years as those developments are built.

#### **Recommended Growth Option**

The Recommended Growth Option is essentially a blend of Options 2B and 3. More growth (than previously forecasted) would be allocated to the urban, serviced areas - specifically Delhi, Simcoe and Waterford which would necessitate additional land supply. Port Dover and Port Rowan would still be allocated an appropriate proportion of the growth; however, both urban areas are going through infrastructure upgrades and should have sufficient land supply to accommodate development for the foreseeable planning horizon. Courtland could also see some moderate additional growth compared to previous forecasts contingent upon continued availability of servicing capacity for water and development on private wastewater systems (e.g., not at higher densities like other urban areas).

To ensure an appropriate amount of employment opportunities and lands in relation to the anticipated population and the available employment land supply, the Recommend Growth Option includes the employment component as well, which includes additional employment land needs in the County - specifically Delhi, Simcoe, Waterford. No major departures from the allocations identified through growth Option 2B is anticipated although the industrial employment area land needs for the County as a whole should be further reviewed against locational criteria for specific land recommendations in the OPA as the next step.

Figure 8. Evaluation Table of Recommended Growth Option and Comparative Options

Option 2B	Option 3	Recommended Growth Option (Hybrid)
High Growth scenario (1.0%)	High Growth scenario (1.0%)	High Growth scenario (1.0%)
More growth to urban areas with treatment plant servicing capacity (Delhi, Simcoe, Waterford) in the short term compared to areas with servicing upgrades/expansions and sufficient lands (Port Dover, Port Rowan)	More growth to serviced urban areas, less in rural settlement areas.	More growth to urban areas with treatment plant servicing capacity (Delhi, Simcoe, Waterford), in the short term compared to areas with servicing upgrades/expansions and sufficient lands (Port Dover, Port Rowan) with additional minor growth to Courtland (subject to existing partial servicing)
Population Forecast Allocation: Simcoe 36% Delhi 21% Waterford 16% Port Dover 11% Port Rowan 5% Courtland 3% All Hamlet / Rural Settlement Areas 8%	Population Forecast Allocation: Simcoe 37% Delhi 21% Waterford 16% Port Dover 11% Port Rowan 4% Courtland 4% All Hamlet / Rural Settlement Areas 7%	Population Forecast Allocation: Simcoe 37% Delhi 21% Waterford 16% Port Dover 11% Port Rowan 4% Courtland 4% All Hamlet / Rural Settlement Areas 7%
Employment Forecast Allocation: Simcoe: 34% Delhi: 22% Waterford: 15% Port Dover: 5% Port Rowan: 4% Courtland: 5% All Hamlet / Rural Settlement Areas: 15%	Employment Forecast Allocation: Simcoe: 34% Delhi: 22% Waterford: 15% Port Dover: 5% Port Rowan: 4% Courtland: 5% All Hamlet / Rural Settlement Areas: 15%	Employment Forecast Allocation: Simcoe: 34% Delhi: 22% Waterford: 15% Port Dover: 5% Port Rowan: 4% Courtland: 5% All Hamlet / Rural Settlement Areas: 15%
Housing Mix: 60% low, 25% medium, 15% high	Housing mix: 53% low, 29% medium, 18% high	Housing Mix: 55% low, 27% medium, 18% high

Intensification target remains 25%	Higher intensification in serviced, urban areas (35%)	Higher intensification in fully serviced, urban areas (30%)
Greenfield Density /Mixed Use Target for fully serviced urban areas: For Urban Residential = 15 units per hectare (equivalent to about 37 residents/ha)	Greenfield Density /Mixed Use Target for fully serviced urban areas: For Urban Residential = 15 units per hectare (equivalent to about 37 residents/ha)	Greenfield Density /Mixed Use Target for fully serviced urban areas: For Urban Residential = 45 residents and jobs per hectare For Urban Employment = 20 jobs per hectare

The housing mix proposed is intended to encourage further diversification in housing options. As noted previously, residential development historically has predominantly been low-density housing. The need for single detached housing is expected to decline as result of the aging population and the shift to medium and higher density building forms, in addition to impacts of housing affordability strains. The proposed housing mix presents a target for the community to continue to shift towards more diversification of housing options and will better meet the needs of all residents into the future.

The Recommended Growth Option includes an intensification rate of 30% for all fully serviced, urban areas, which would be a recommended increase to the existing Official Plan target; however, has been demonstrated to be achieved over the past 5 years and although intensification will become more challenging over time it provides many benefits, will help provide a wider range of housing options for our communities as outlined in the housing mix (including aging in place), and based on recent development approvals and market conditions could be achievable. Future reviews may consider whether a varied rate is appropriate at the time and given the intensification analysis/opportunities.

To help achieve the housing mix and choice, utilize land and infrastructure (both hard and community) more efficiently and effectively along with provide a wider range of opportunities for living/working in closer proximity (such as work from home, live/work, mixed use) and not have entirely new homogenous residential areas only, it is recommended to further review the existing lower density requirement for new residential areas to establish a slightly higher target and one that includes the potential for mixed use in the OPA.

## Recommendations and Next Steps

The following are the overall study recommendations, including for next steps:

1. Reconfirming that the High Growth Scenario of 1.0% per annum for residential and 1.1% per annum for employment be utilized as an input to future growth considerations;
2. That the Recommended Growth Option (Hybrid) be endorsed and utilized as an input to amendment and review of the Norfolk Official Plan
3. That the GROW Norfolk Study and its associated reports, volumes and comprehensive review analysis prepared by Watson and Associates be considered a “municipal comprehensive review” as identified in the Provincial Policy Statement.
4. That a municipal-led Official Plan Amendment that includes recommendations on specific lands/parcels as it relates to settlement area boundaries, protected industrial / employment areas, along with review of intensification and greenfield targets to implement the GROW Norfolk Study and municipal comprehensive review proceed for public review and a decision.
5. That further infrastructure (hard and community) analysis be undertaken in the OPA, including scenario modeling where appropriate.
6. That new Land Use Plans and Master Servicing Strategies be prepared following the OPA with prioritization to Delhi, Simcoe, Waterford.
  - a. This should include detailed infrastructure modeling and master planning of the new land use and densities. Implications should be considered in the final plan. Any resultant future growth-related infrastructure needs should be considered in future Development Charges Background Study.
7. In follow-up to the evaluation criteria and provincial policy conformity review, explore the agricultural (potential prime and rural lands) and natural heritage policies and designations in the municipal-led Official Plan Amendment and future Official Plan reviews.
8. That the GROW Norfolk Study, including the High Growth Scenario population and employment forecasts and the Recommended Growth Option (Hybrid) along with any resultant Official Plan Amendment be utilized as an input to future Master Plan updates (infrastructure, parks and recreation, library and fire, development charges, etc.)
9. That an annual Growth Management Monitoring Report be prepared in combination with the annual Servicing Monitoring Report. The report should include at minimum updates on the development rates/amounts of the preceding year (subdivision/vacant land condominium/site plan approvals and registrations along with total building permits by type), intensification level, and land supply updates for greenfield and intensification areas - including identification of sufficient land to meet provincial policy statement minimum targets. The report should track residential, industrial, commercial and institutional uses.
  - a. The monitoring report could also establish further information about the potential housing mix within registered, draft approved, in

circulation/pending, designated land for future development and intensification areas.

- b. The tracking of housing mix and density achievement in new developments could be included with comparison to the Preferred Growth Option
- c. Establish assumptions, reporting procedures and monitoring of mixed-use development.
- d. Further connect development application and approval information such as potential dwelling unit and non-residential development along with assumptions for potential development in designated future development and intensification areas to servicing infrastructure tracking, modeling and monitoring through CityView, GIS and modeling software systems.







## Appendices:




Appendix A - Evaluation Framework - Growth Option Summary





Appendix B - Phase 2 Comprehensive Review: Growth Scenarios and Urban Land Needs Analysis, 2023 to 2048 prepared by Watson and Associates Economists Ltd, October 10, 2023









# Appendix A









GROW NORFOLK – OPTIONS EVALUATION TOOL


	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
1	<b>Efficient Growth - Complete communities</b>  OP: 2.2.4 / 2.2.6				
2	<b>Economic Growth</b>  OP: 2.2.1  Create a planning framework that promotes a flexible and adaptable economic environment that encourages investment and a broad range of employment opportunities, supports the growth of tourism in the County, protects the vitality and growth of the agricultural industry, and revitalizes Downtown Areas while recognizing retail trends and community needs.				





	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
3	<b>LEAR – Land Evaluation Area Review – Prime Agricultural Land protection</b>  <b>OP: 6.7, 7.2, 2.2.3</b>  Protect the unique character of Norfolk’s cultural landscapes, Urban Areas, Hamlet Areas and Agricultural Area through heritage conservation, community design and redevelopment policies that promote community health, safety and broad aesthetic appeal.				
4	<b>Infrastructure to support growth (HARD INFRASTRUCTURE)</b>  <b>OP: 2.2.5, 7.17, 8.0</b>				
4 a)	<b>Transportation</b>  <b>OP: 8.2, 8.3</b>				









	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
	<p>Transportation plays an important role in determining the quality of life within a community through the level of service and accessibility to employment, social, recreational and shopping opportunities provided by the transportation network. Road, rail, air and water transportation all play roles in goods movement throughout the County.</p> <p>The County shall ensure the co-ordination between growth management and the transportation systems.</p>				
4 b)	<p>Walking, Cycling and Trails</p> <p>Bicycle and pedestrian trails and paths contribute to healthy communities. This Plan recognizes and supports cycling and walking as alternative sustainable modes of travel. The County encourages the development of enhanced walking and cycling routes designed for people of all ages and abilities.</p>				









	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
4 c)	<b>Water</b>  OP: 8.9  Municipal water systems exist in all six of the Urban Areas. The County intends to improve and extend municipal water services throughout the Urban Areas. Municipal waste water treatment systems exist in Simcoe, Port Dover, Delhi, Waterford and Port Rowan. There are also a number of private communal water supply systems, principally serving Resort Areas. The balance of the County is serviced by private wells and individual waste water disposal systems. The County will ensure that cost-effective and adequate systems for water supply and wastewater treatment are provided to support, enhance and sustain existing and future residents and businesses in the County.				
	<b>Wastewater</b>				

	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
	<p><b>Storm water</b></p> <p><b>8.9.4</b></p> <p>In the Urban Areas, impermeable surfaces such as building rooftops and parking lots reduce the ability of the land to absorb storm flows. Additionally, the water runs off the land at an increased rate. The impact of this often results in flooding, changes to adjacent watercourses such as erosion of banks, and potential pollution of watercourses. This impacts the quality of surface water as well as the natural environment. Norfolk County shall apply best management practices in dealing with stormwater management to improve the quality of storm water and to minimize flooding.</p>				
4 d)	<p><b>Utilities</b></p> <p><b>OP: 8.7</b></p> <p>The continual advancement of utilities and telecommunications technology, coupled with the need for rapid information transfer, will have a significant impact on the future development and economic vitality of the County.</p>				

	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
5	<p><b>Infrastructure to support growth (SOFT INFRASTRUCTURE)</b></p> <p><b>OP: 2.2.3, 2.2.4, 5.0, 5.7</b></p> <p>Protect the unique character of Norfolk’s cultural landscapes, Urban Areas, Hamlet Areas and Agricultural Area through heritage conservation, community design and redevelopment policies that promote community health, safety and broad aesthetic appeal.</p> <p>Reinforce Norfolk’s strong sense of community through the provision of public services, the development of safe and attractive communities and the celebration of Norfolk’s unique cultural and natural heritage, by involving residents in making decisions on planning matters and by promoting a healthy community through active lifestyles.</p>				

	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
5 a)	<p><b>Institutional uses – schools, places of worship, cultural heritage, etc.</b></p> <p><b>OP: 5.7, 5.2, 7.14</b></p> <p>In addition to infrastructure services such as roads, water and sewers, the County provides a range of human services such as recreational facilities, homes for the aged and social housing, in addition to core municipal services. The County also plays a role, with other public service providers, in defining where and how health care and educational facilities are to be provided in the County. All of these services are fundamental to maintaining healthy communities and a high quality of life. It is beyond the scope of an official plan to deal with such matters as education, child care, health care, social services or recreational programming.</p>				

	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
5 b)	<p><b>Parks and opens space</b></p> <p><b>OP: 5.6, 7.15</b></p> <p>Reinforce Norfolk’s strong sense of community through the provision of public services, the development of safe and attractive communities and the celebration of Norfolk’s unique cultural and natural heritage, by involving residents in making decisions on planning matters and by promoting a healthy community through active lifestyles.</p>				
6	<p><b>Natural heritage</b></p> <p><b>OP: 2.2.2, 3.0</b></p> <p>Protect and enhance the quality of the natural environment through a planning framework that conserves and enhances the diversity and connectivity of the natural forms, features and functions of Norfolk’s natural heritage, surface water and ground water resources, and that minimizes and mitigates impacts on air quality.</p>				

	Grow Norfolk Theme & Corresponding Official Plan Goal / Objective	Scenario – Option 1: Base Case	Scenario – Option 2 a)  Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity	Scenario – Option 2 b)  Higher Growth and Allocations Aligned to Available Servicing Capacity	Scenario Option 3  Higher Growth and High Intensification
7	<b>Fiscal Responsibility</b>  OP: 2.2.6				
8	<b>Promotion of Intensification</b>  OP: 5.3.1, 6.0  The intensification of urban residential development reduces the need to use vacant designated land on the periphery of the Urban Areas. It also reduces the need for urban expansions encroaching into the Agricultural Area. Urban residential intensification, infilling and redevelopment of existing areas allows for the efficient provision of urban services thereby helping to minimize the costs of providing services while meeting an important component of the County’s housing needs.				

# Appendix B



# **Phase 2 Comprehensive Review: Growth Scenarios and Urban Land Needs Analysis, 2023 to 2048**

## **Norfolk County**

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**November 7, 2023**

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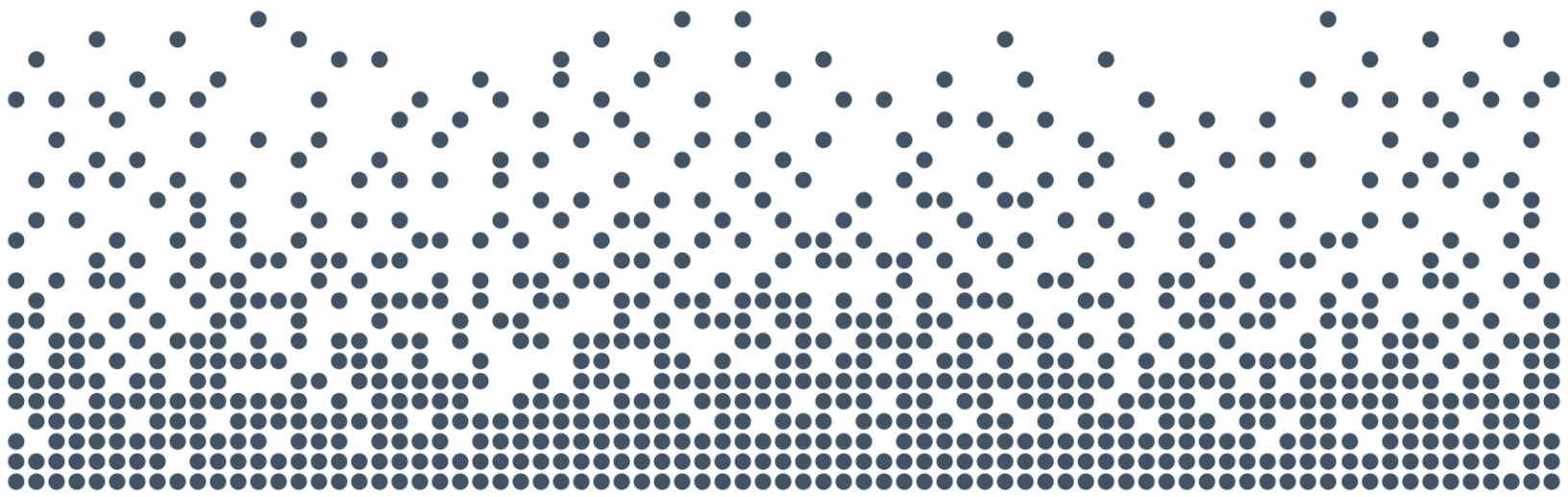
# Table of Contents

	Page
<b>Executive Summary .....</b>	<b>i</b>
<b>1. Introduction - Residential Growth Scenarios and Urban Land Needs .....</b>	<b>1-1</b>
1.1 Terms of Reference .....	1-1
1.2 Provincial Planning Policy Context .....	1-2
<b>2. Overview of County-wide Reference and High Growth Scenarios.....</b>	<b>2-1</b>
2.1 Background.....	2-1
2.2 Surrounding Area/Commuter-Shed Growth Outlook.....	2-3
2.3 Higher Population Growth in Norfolk County will Require a Significant Sustained Increase in Net Migration.....	2-6
2.4 Labour Force Outlook .....	2-7
<b>3. County-wide Growth Allocation Options.....</b>	<b>3-1</b>
<b>4. Residential Land Supply and Land Needs by Urban Settlement Area, 2023 to 2048 .....</b>	<b>4-1</b>
<b>5. Summary of Stakeholder Expansion Requests .....</b>	<b>5-1</b>
<b>6. Conclusions: Residential Growth Scenarios and Urban Land Needs Assessment .....</b>	<b>6-1</b>
<b>7. Regional Economic Analysis.....</b>	<b>7-1</b>
7.1 Key Industrial Sectors / Clusters in Regional Economy Surrounding Norfolk County .....	7-1
7.2 Norfolk County Employment Growth Trends.....	7-2
<b>8. Overview of Norfolk County Employment Growth and Allocations.....</b>	<b>8-1</b>
<b>9. Employment Area Profile and Land Supply .....</b>	<b>9-1</b>
<b>10. Employment Area Land Needs by Urban Settlement Area, 2023 to 2048 .....</b>	<b>2</b>
<b>11. Conclusions - Employment Area Land Needs .....</b>	<b>11-1</b>
<b>Appendix A Land Supply Mapping .....</b>	<b>A-1</b>



## List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
COVID-19	Coronavirus disease
C.R.	Comprehensive Review
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
M.O.F.	Ministry of Finance
N.F.P.O.W.	No fixed place of work
O.P.	Official Plan
P.P.S.	Provincial Policy Statement
P.P.U.	persons per unit
U.S.	United States



# Executive Summary



# Executive Summary

As a part of its Official Plan (O.P.) review exercise, Norfolk County is undertaking an update of its long-term population and employment growth forecasts and urban land requirements. The results of this analysis are intended to guide decision-making and policy development specifically related to long-term planning and growth management, municipal finance and infrastructure planning carried out by Norfolk County.

Phase 1 of this long-term growth analysis exercise was completed in December 2021 which provided an update to the County's long-term population, household and employment growth forecasts and allocations by urban area and remaining rural area to the year 2051.<sup>[1]</sup> Through Phase 2 of this exercise, the County is undertaking a further assessment of the Phase 1 growth allocations by urban area in accordance with anticipated housing demand, available water/wastewater capacity and O.P. policies.

## **Part 1- Residential Growth Scenarios and Urban Land Needs Assessment**

In accordance with the macro-economic trends and regional growth drivers assessed as part of the Phase 1 report, three long-range growth scenarios were developed, including a Low Growth Scenario, Medium Growth Scenario, and High Growth Scenario. Of the three scenarios, the Medium Growth Scenario was previously considered the reference or most likely scenario based on an assessment of past trends and future growth drivers. Upon further review of recent development trends and development interest within the County, as well as a review of broader demographic trends and population growth potential within central and southwestern Ontario, the High Growth Scenario is now identified as the recommended growth scenario. As previously mentioned, this technical memorandum explores a series of growth allocation options within the context of the High Growth Scenario, subject to a review of local housing supply and demand factors which are anticipated to influence the location of housing demand within the County.

The following key observations are presented in this technical memorandum:

- Based on the assessment of macro-economic and regional growth trends and drivers provided herein, it is recommended that the High Growth Scenario is

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<sup>[1]</sup> Comprehensive Review Phase 1: Long-Term Growth Analysis, Watson & Associates Economists Ltd., December 2021.



utilized as the County's population growth forecast for long-range planning purposes for the County.

- On a County-wide level, there is a surplus of vacant designated residential land supply to accommodate the High Growth Scenario to the year 2051. In accordance with anticipated housing demand under the High Growth Scenario, the County currently has close to a 40-year supply of vacant, designated, greenfield housing. Notwithstanding this calculated oversupply, potential mismatches between forecast urban demand and supply by urban settlement area exist. For Delhi, an urban residential deficit ranging between 27 and 77 gross developable ha has been calculated. For Waterford, an urban residential deficit ranging between 19 and 34 gross developable ha has been calculated. For Courtland, an urban residential deficit of approximately 8 to 9 gross developable ha has been calculated.
- Upon our examination of the residential growth options, Option 2B (Higher Growth and Allocations Aligned to Available Servicing Capacity) is recommended. This growth option represents an appropriate target of housing development through residential intensification while maximizing existing water and wastewater capacity to the Delhi, Simcoe and Waterford.
- This report represents a foundational analysis based on an overview of available urban land supply, forecast housing demand and municipal servicing capacity. Further analysis is recommended to evaluate growth option 2B based on a range of planning, financial/land economics, and infrastructure development criteria. Additional evaluation and assessment will also be required to determine the preferred location option for urban expansion (if deemed required) under growth option 2B.

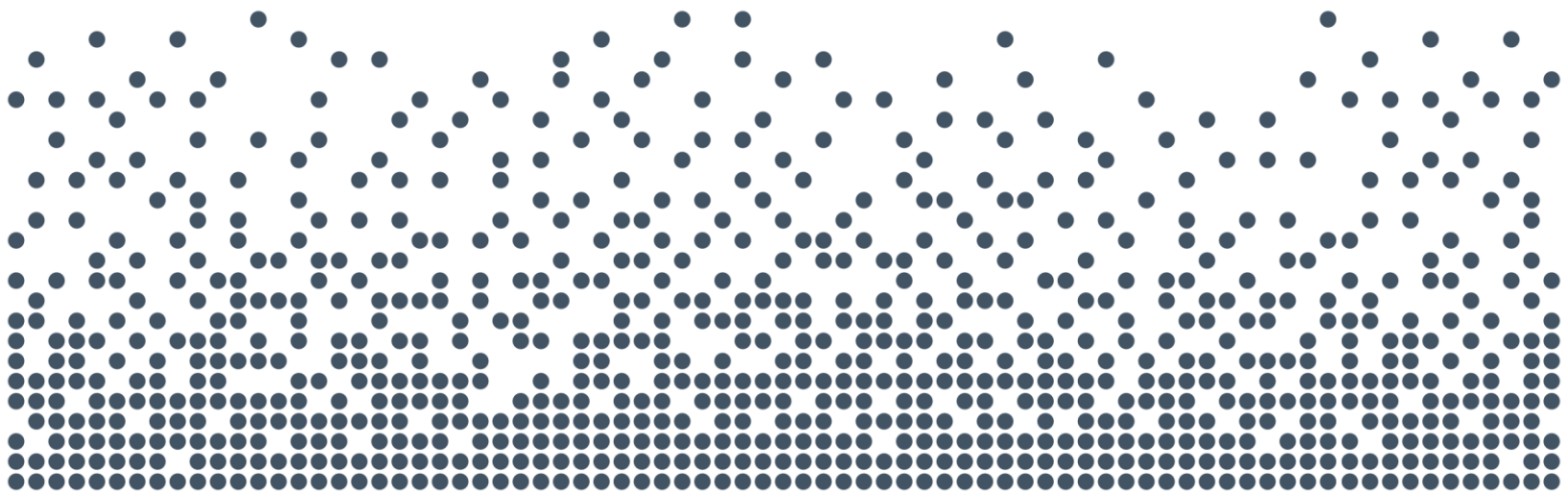
## **Part 2- Employment Area Land Needs**

Building on the previously completed Phase 1 analysis this study also provides an assessment of the County's long-term Employment Area land needs within the context of the High Growth Scenario for Norfolk County. This analysis draws from a review of local employment land supply and demand factors and local population growth rates which are anticipated to influence the location of employment growth and Employment Area land needs within the County over the next 25 years.



The following key conclusions are provided with respect to the County's long-term Employment Area land needs to the year 2048:

- Based on the assessment of macro-economic and regional growth trends and drivers, it has been recommended that the High Growth Scenario is utilized as the County's employment growth forecast for long-range planning purposes for the County.
- As previously discussed, upon our examination of the residential growth options, Option 2B is recommended. Accordingly, the allocation of employment (particularly population related employment) has been updated based on growth option 2B.
- In accordance with the County's supply of designated, developable vacant Employment Areas located in urban settlement areas and forecast demand for these lands, a County-wide deficit of 52 gross ha (129 gross acres) has been identified by 2048. For Delhi, Simcoe and Waterford an urban Employment Area deficit of 10, 22, and 20 gross ha has been calculated, respectively. Courtland has a surplus of 28 ha of vacant urban employment land. It is also noted that due to the absence of planned / vacant industrial land area in Port Dover and Port Rowan, these settlement areas are not anticipated to accommodate significant industrial employment growth over the forecast horizon.



# Report



# Chapter 1

## Residential Growth Scenarios and Urban Land Needs – Background



# 1. Introduction – Residential Growth Scenarios and Urban Land Needs

## 1.1 Terms of Reference

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As a part of its Official Plan (O.P.) review exercise, Norfolk County is undertaking an update of its long-term population and employment growth forecasts and urban land requirements. The results of this analysis are intended to guide decision-making and policy development specifically related to long-term planning and growth management, municipal finance and infrastructure planning carried out by Norfolk County.

Phase 1 of this long-term growth analysis exercise was completed in December 2021 which provided an update to the County's long-term population, household and employment growth forecasts and allocations by urban area and remaining rural area to the year 2051.<sup>[1]</sup> Through Phase 2 of this exercise, the County is now undertaking a further assessment of the Phase 1 growth allocations by urban area in accordance with anticipated housing demand, available water/wastewater capacity and O.P. policies.

In accordance with the macro-economic trends and regional growth drivers assessed as part of the Phase 1 report, three long-range growth scenarios were developed, including a Low Growth Scenario, Medium Growth Scenario, and High Growth Scenario. Of the three scenarios, the Medium Growth Scenario was previously considered the reference or most likely scenario based on an assessment of past trends and future growth drivers. Upon further review of recent development trends and development interest within the County, as well as a review of broader demographic trends and population growth potential within central and southwestern Ontario, the High Growth Scenario is now identified as the recommended growth scenario. As previously mentioned, this report explores a series of growth allocation options within the context of the High Growth Scenario, subject to a review of local housing supply and demand factors which are anticipated to influence the location of housing demand within the County.

This report also provides an assessment of Employment Area land needs over the next 25 years within the context of the High Growth Scenario for Norfolk County. This

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<sup>[1]</sup> Comprehensive Review Phase 1: Long-Term Growth Analysis, Watson & Associates Economists Ltd., December 2021.

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analysis draws from a review of local employment land supply and demand factors and local population growth rates which are anticipated to influence the location of employment growth and Employment Area land needs across the County over the long-term.

## 1.2 Provincial Planning Policy Context

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The Phase 1 growth report was prepared under the purview of the Provincial Policy Statement (P.P.S.), 2020. On April 7, 2023, the Province of Ontario released a new Provincial Planning Statement (P.P.S.), 2023 in concert with introducing Bill 97: *Helping Homebuyers, Protecting Tenants Act, 2023*. Bill 97 proposes amendments to seven provincial statutes, including the *Planning Act*. The proposed P.P.S., 2023 is intended to simplify and integrate existing provincial policies (A Place to Grow: Growth Plan for the Greater Golden Horseshoe and the P.P.S., 2020) while providing municipalities and the Province with greater flexibility to deliver on housing objectives. A key focus of the proposed P.P.S., 2023 is that it recognizes that the approach for achieving housing outcomes will vary by municipality and, as such, moves away from a prescriptive guideline approach to growth forecasting and urban land needs assessment.

According to the proposed P.P.S., 2023, at the time of each O.P update, sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of at least 25 years. The previous P.P.S. required that municipalities accommodate projected needs up to 25 years. Furthermore, there are no restrictions on designating Employment Area uses beyond a 25-year horizon. The P.P.S., 2020 allowed for the planning of the long-term protection of Employment Areas beyond a 25-year horizon; however, it did not allow for designation of land beyond a 25-year horizon.

Generally unchanged from the P.P.S, 2020, the proposed P.P.S., 2023 still requires planning authorities to maintain, at all times, the ability to accommodate residential growth for a minimum of 15 years through lands which are designated and available for residential development. It also prescribes that where new development is to occur, planning authorities maintain, at all times, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned, including units in draft approved or registered plans.



The proposed P.P.S. 2023 identifies that;

“Planning authorities should support the achievement of complete communities by:

- a) accommodating an appropriate range and mix of land uses, housing options, transportation options with multimodal access, employment, public service facilities and other institutional uses (including, schools and associated childcare facilities, long-term care facilities, places of worship and cemeteries), recreation, parks and open space, and other uses to meet long-term needs;
- b) improving accessibility for people of all ages and abilities by addressing land use barriers which restrict their full participation in society;
- c) and improving social equity and overall quality of life for people of all ages, abilities, and incomes, including equity-deserving groups.”  
(Proposed Provincial Planning Statement, p. 6)

The proposed P.P.S. further identifies that,

“Planning authorities shall promote economic development and competitiveness by:

- a) providing for an appropriate mix and range of employment, institutional, and broader mixed uses to meet long-term needs;
- b) providing opportunities for a diversified economic base, including maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses;
- c) identifying strategic sites for investment, monitoring the availability and suitability of employment sites, including market-ready sites, and seeking to address potential barriers to investment; and
- d) encouraging intensification of employment uses and compact, mixed-use development that incorporates compatible employment uses such as office, retail, industrial, manufacturing and warehousing, to support the achievement [of] complete communities.” (Proposed Provincial Planning Statement, p. 11)

The achievement of complete and competitive communities is an important concept to consider with respect to the balance between residential and non-residential growth across the County over the long term. In accordance with the proposed P.P.S., 2023,



complete and competitive communities include an appropriate mix of jobs and a full range of housing. Accordingly, the long-term vision and preferred growth scenario for the County should be considered within the context of complete and competitive communities. Attempting to accelerate population growth too aggressively within the County, without consideration of how such population growth would be balanced by an appropriate mix of jobs (including export-based/industrial jobs in addition to community-supportive employment), would potentially undermine the proposed P.P.S., 2023 policies related to complete and competitive communities.



# Chapter 2

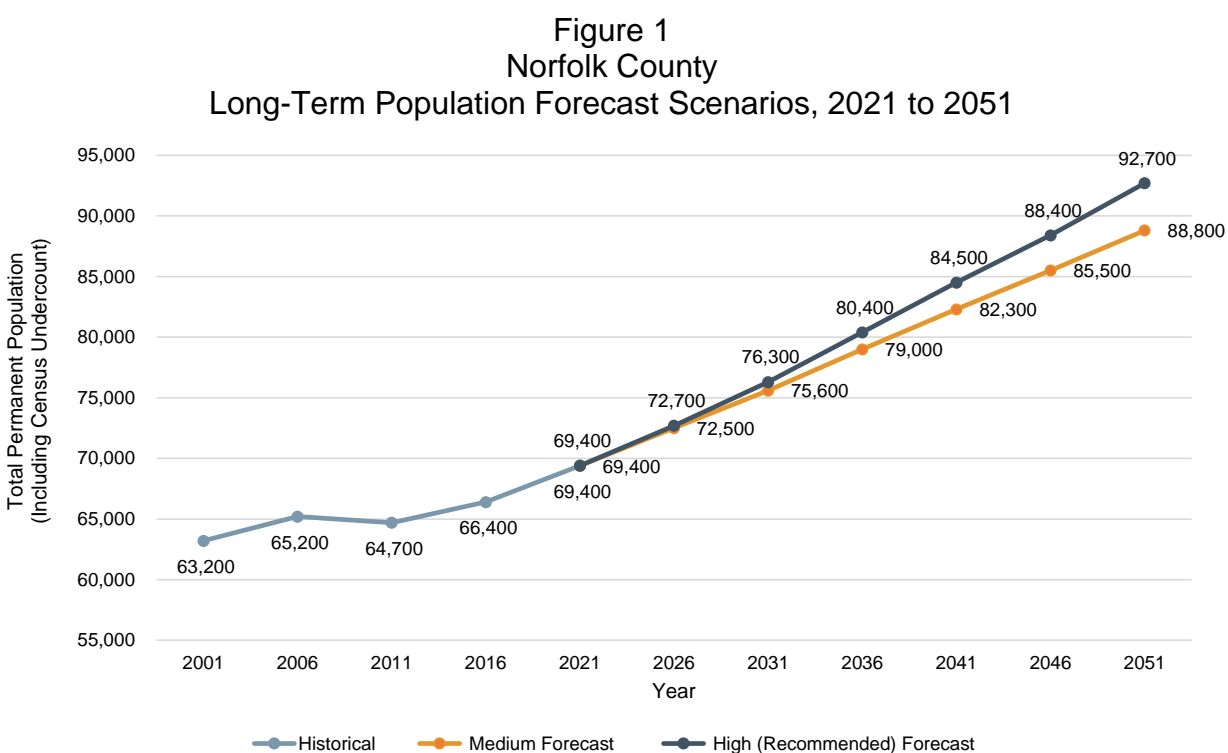
## Overview of County-wide Reference and High Growth Scenarios



## 2. Overview of County-wide Reference and High Growth Scenarios

### 2.1 Background

As a part of the Phase 1 long-term growth analysis study, a range of demographic and economic drivers were assessed in arriving at three growth scenarios for the County. Figure 1 provides a comparison of the Medium and High Growth Scenarios. Under the Medium Growth Scenario, Norfolk County's permanent population is forecast to grow at an annual rate of approximately 0.8%. This represents an average annual growth rate that is well above the historical growth rate of 0.3% achieved within Norfolk County from 2001 to 2016. Comparatively, under the High Growth Scenario, the County's permanent population is forecast to grow at an average annual rate of 1.0% per year. Under this scenario, the permanent population of Norfolk County is anticipated to grow by approximately 26,300 persons, increasing from 66,400 in 2016 to 92,700 by 2051.

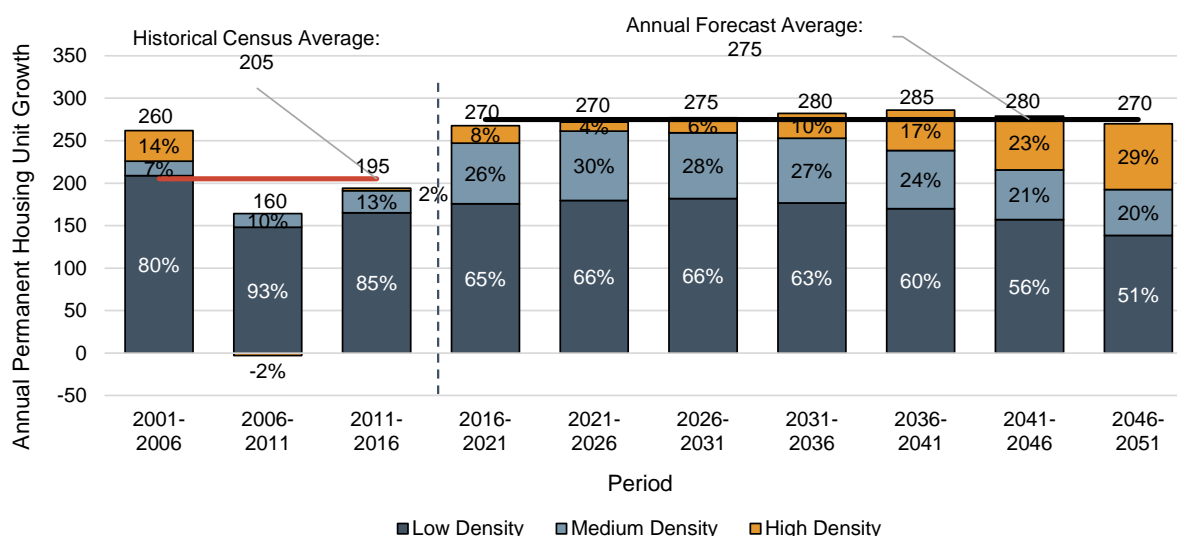


Source: 2001 to 2021 from Statistics Canada Census, forecast by Watson & Associates Economists Ltd, 2022.



Figure 2 and Figure 3 summarize incremental annual housing growth estimated within the County under the High and Medium Growth Scenarios. As shown in these figures, the County has historically added an average of 205 housing units annually from 2001 to 2016. Comparatively, under the Medium and High Growth Scenarios, the County is forecast to average 275 and 315 additional housing units, respectively, annually from 2016 to 2051.

**Figure 2**  
**Norfolk County**  
**Five-Year Incremental Housing Growth – Historical and Forecast (Medium Growth Scenario), 2001 to 2051**



Note:

Low density includes singles and semis, in addition to seasonal units converted to year-round permanent occupancy.

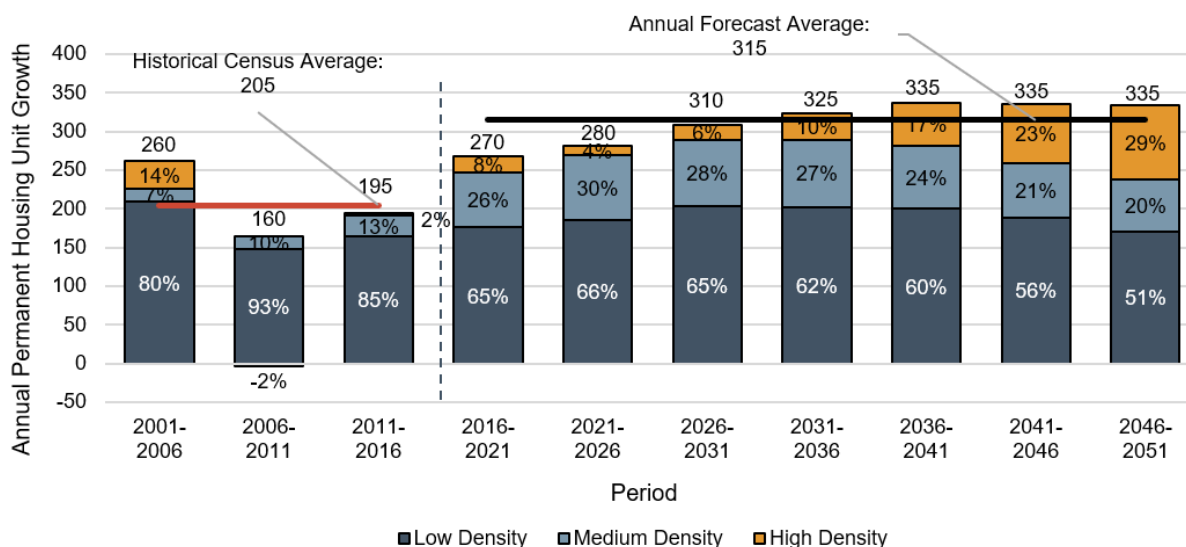
Medium density includes townhouses and apartments in duplexes.

High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: 2001 to 2016 derived from Statistics Canada 2011 to 2016 Census data. 2016 to 2051 forecast by Watson & Associates Economists Ltd.



**Figure 3**  
**Norfolk County**  
**Five-Year Incremental Housing Growth – Historical and Forecast (High Growth Scenario), 2001 to 2051**



**Notes:**

- Low density includes singles and semi-detached units, in addition to seasonal units converted to year-round occupancy.
- Medium density includes townhouses and apartments in duplexes. High density includes bachelor, 1-bedroom and 2-bedroom+ apartments.
- Figures may not add due to rounding.

Source: Historical 2001 to 2016 figures from Statistics Canada Census Profiles. Forecast prepared by Watson & Associates Economists Ltd., 2022.

The following section provides an overview of the long-term growth forecast for Norfolk County within the context of the broader region/commuter-shed.

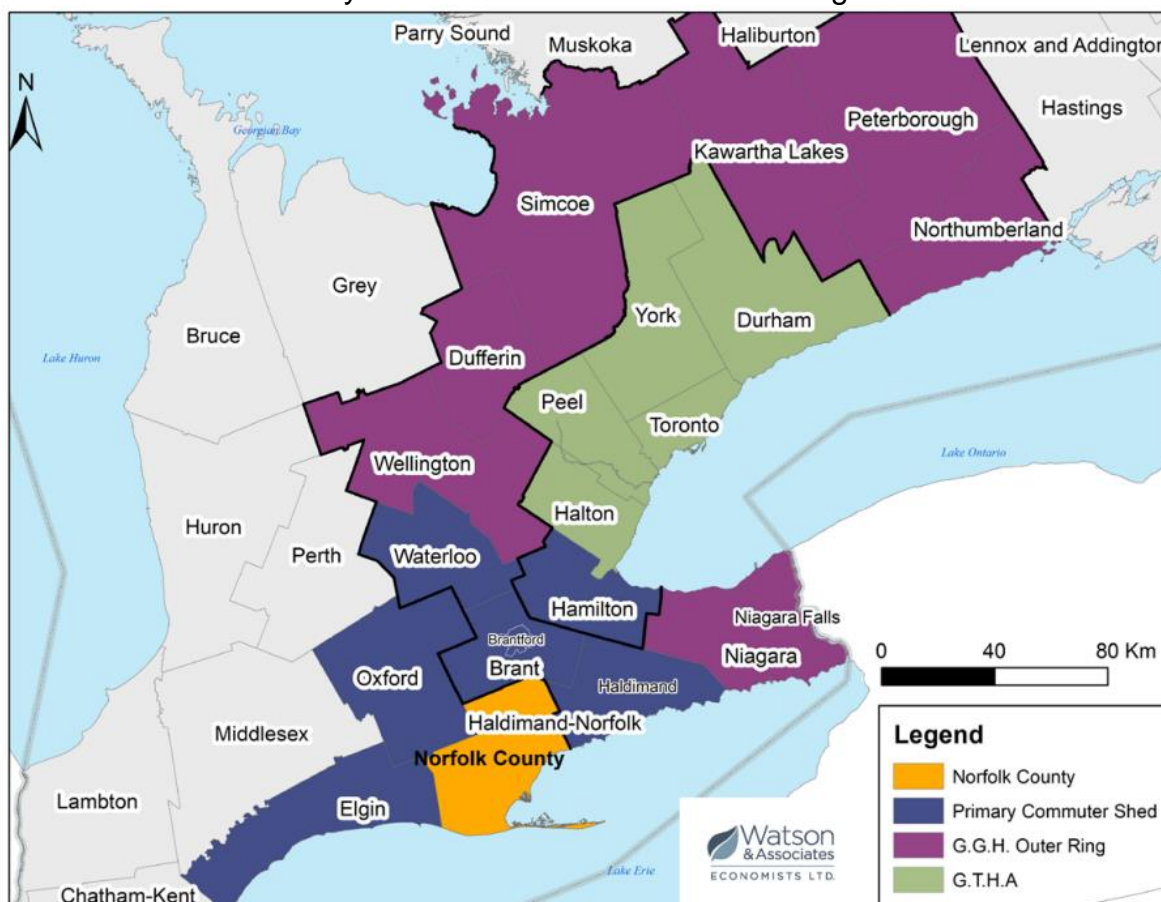
## 2.2 Surrounding Area/Commuter-Shed Growth Outlook

Figure 4 geographically summarizes the location of Norfolk County within the context of the surrounding primary commuter-shed and Greater Golden Horseshoe (G.G.H.) upper-tier/single-tier municipalities. Figure 5 provides a comparison of Norfolk County's 2021 to 2051 forecast population growth rate under the High and Medium Growth Scenarios relative to the surrounding primary commuter-shed and G.G.H. municipalities based on recent O.P. updates. As shown in Figure 5, the G.G.H. population is anticipated to grow at an annual rate of 1.3%. Many of the municipalities within the



“905” area of the Greater Toronto Area (G.T.A.) and the G.G.H. Outer Ring are anticipated to be amongst the fastest growing municipalities in the Province. Moving westward throughout southwestern Ontario and outside the G.G.H., forecast population growth rates are slightly lower than the G.G.H. on average. It is noted, however, that forecast population growth rates in these municipalities have been steadily rising in accordance with recent growth forecast updates. Within the Norfolk County commuter-shed (refer to Figure 4), municipalities located along the Highway 401 and 403 corridors are anticipated to be the fastest growing in most cases.

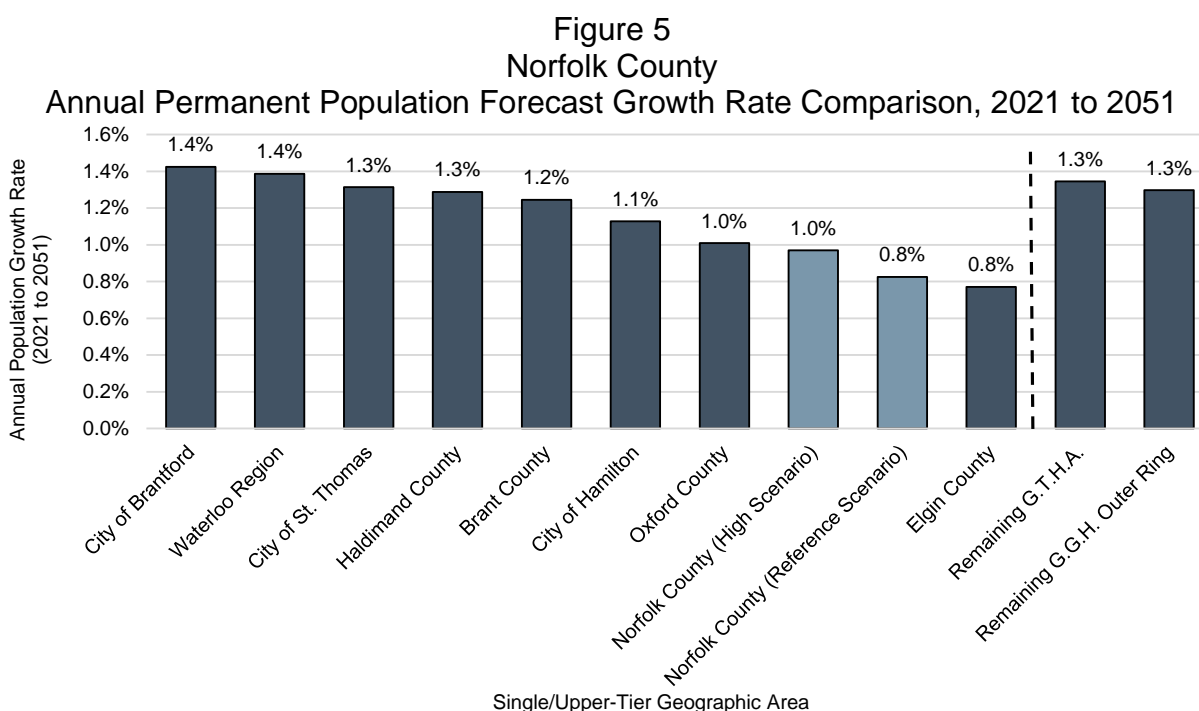
Figure 4  
Norfolk County  
Primary Commuter-Shed and Surrounding Area



It is important to note that all the municipalities within the Norfolk County commuter-shed (including Norfolk County) are anticipated to achieve higher rates of population and employment growth relative to historical trends. These increased rates are driven by a stronger local and regional economic outlook, impacts of recent outward growth



pressures from the G.G.H. experienced between 2020 and 2022 during the coronavirus disease (COVID-19) pandemic, and stronger immigration potential driven by higher federal immigration targets. As shown in Figure 5, Norfolk County is forecast to grow at an annual rate of 0.8% under the Reference Scenario, and 1.0% under the High Growth Scenario. Under the High Growth Scenario, the County's forecast annual population growth rate is comparable to Oxford County, higher than Elgin County, and slightly lower than neighbouring municipalities to the north/northeast including the County of Brant, Haldimand County and the City of Hamilton.



Note: Oxford County is based on a 2021 to 2046 annual growth rate.

Source: Based on recent Comprehensive Reviews or O.P. updates by Watson & Associates Economists Ltd. and Hemson Consulting Ltd. Figure derived by Watson & Associates Economists Ltd., 2023.

The Ministry of Finance (MoF) prepares population growth forecasts for Ontario and by Census Division (C.D.).<sup>[1]</sup> The growth scenarios presented in the Phase 1 Norfolk

<sup>[1]</sup> Statistics Canada defines Census division (C.D.) as “the general term for provincially legislated areas (such as county, municipalité régionale de comté and regional district) or their equivalents. Census divisions are intermediate geographic areas between the province/territory level and the municipality (census subdivision).” It is important to note that a C.D. can contain multiple single/upper-tier municipalities.



County Growth Analysis report and summarized in Figure 1 in this report have been assessed against the 2022 MoF forecasts for the Norfolk-Haldimand C.D. and primary commuter-shed. The forecasts for Norfolk County and Haldimand County, as well as the current O.P. forecasts for the surrounding municipalities within the primary commuter-shed, as presented in Figure 5, are generally comparable to the MoF 2022 Medium Growth Scenario. The MoF also prepares a High growth forecast for the Province as a whole. In accordance with the MoF, the Province of Ontario's population is forecast to grow at an annual rate of 1.3% and 1.8% under the 2022 Medium and High Growth Scenarios, respectively.<sup>[1]</sup>

The MoF Medium growth forecast for the Province recognizes the potential for higher population growth relative to long-term historical trends through the achievement of higher immigration. Achieving even higher population growth across the Province as a whole, as set out under the MoF High Scenario, would require either the achievement of significantly stronger immigration levels relative to federal immigration targets or an assumption that Ontario achieves a significant increase in the share of national immigration. It is also important to recognize that Ontario's target for 1.5 million additional homes over the next 10 years under Bill 23, More Homes Built Faster Act is premised on the 2022 MoF Reference forecast.<sup>[2]</sup>

## **2.3 Higher Population Growth in Norfolk County will Require a Significant Sustained Increase in Net Migration**

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As discussed in the County's Phase 1 report, the population of Norfolk County is aging, which puts downward pressure on the rate of population and labour force growth at the County-wide level over the long term. To mitigate the negative economic impacts of an aging population and labour force, the federal government has increased their five-year immigration targets in recent years.

As illustrated in Figure 6 the amount of population growth associated with net migration in Norfolk County will be required to steadily increase over next 30 years to achieve the High Growth Scenario due to the aging of the population and associated population

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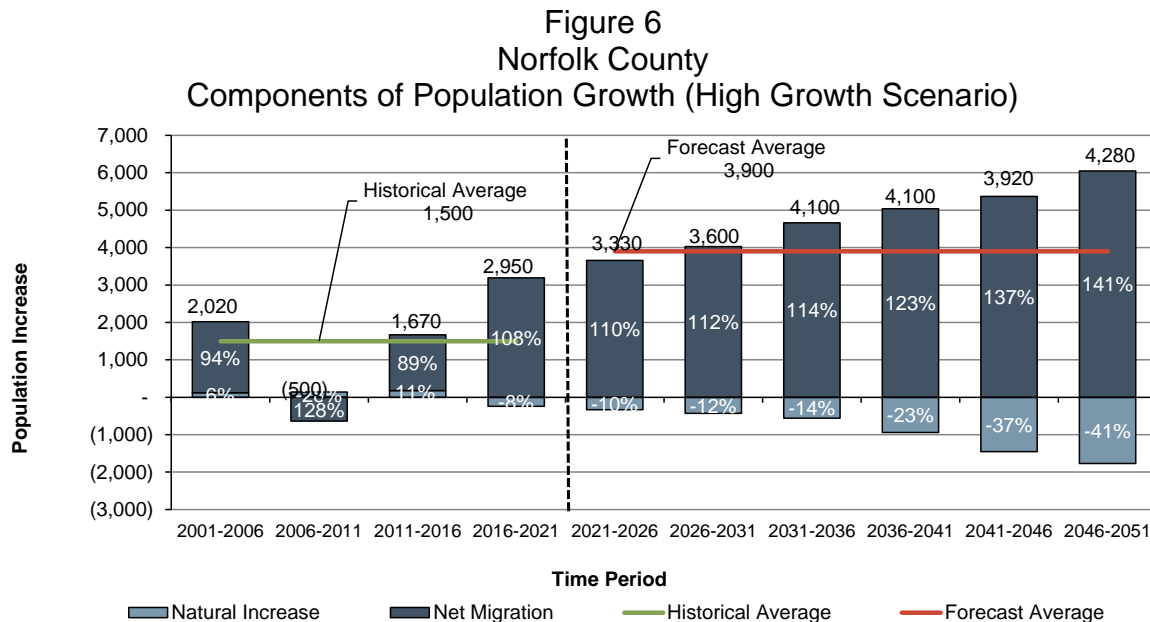
<sup>[1]</sup> It is noted that the most recent 2023 MoF population forecast for Ontario assumes an annual growth rate of 1.5% and 2.0%, respectively under the Reference and High Growth Scenario.

<sup>[2]</sup> Ontario's Need for 1.5 Million More Homes. Smart Prosperity Institute. August 2022.

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decline associated with natural increase (births minus deaths). To achieve the High Growth Scenario, the County requires a noticeable increase in net migration of 223% (3.2 times the increase) from 2021 to 2051 under the High Growth Scenario relative to the 2001 to 2021 period.



Source: Historical based on Statistics Canada data, forecast by Watson & Associates Economists Ltd., 2023.

## 2.4 Labour Force Outlook

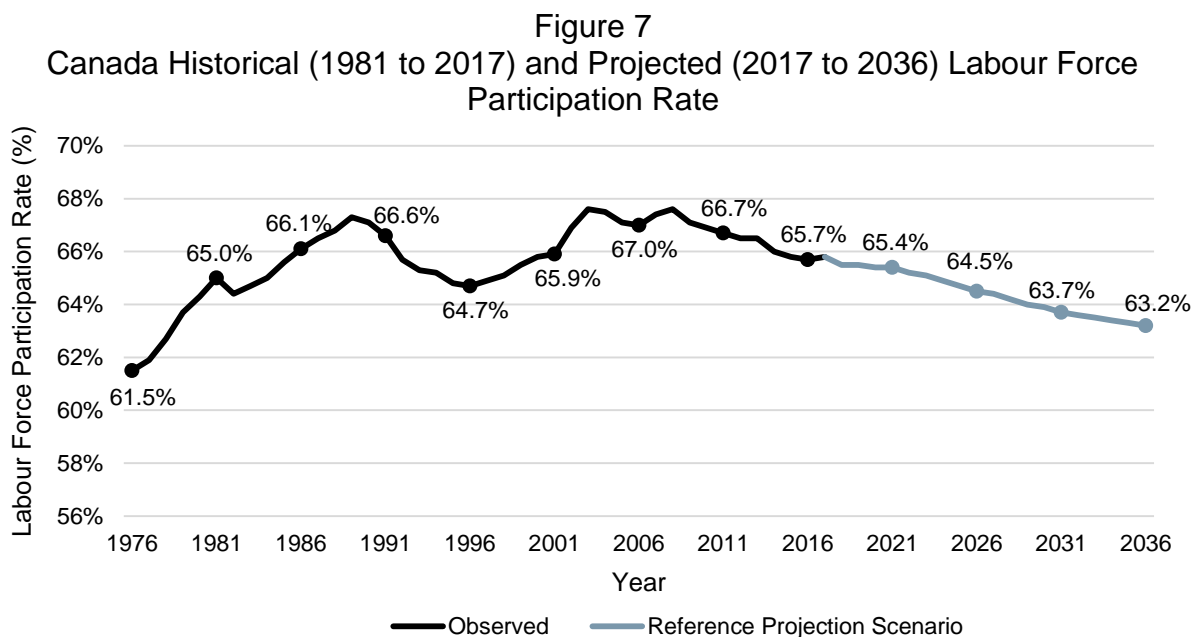
As previously mentioned in the Phase 1 report, local and regional employment growth opportunities in the commuter-shed represent a primary driver of net migration and ultimately long-term population growth opportunities for Norfolk County. Statistics Canada provides a labour force participation rate forecast between 2017 and 2036 for Canada and its Regions.<sup>[1]</sup> The labour force participation rate is defined as the percentage of the population that is actively participating in the labour force. According to Statistics Canada, the Canada-wide labour force participation rate is forecast to decline from 66% in 2016 to 63% in 2036, largely driven by the aging of the country's Baby Boom population age group (born between 1946 and 1964). Over the next

<sup>[1]</sup> Statistics Canada. Insights on Canadian Society. The labour force in Canada and its regions: Projections to 2036, by Laurent Martel, March 20, 2019.



decade, a growing portion of this age group will have reached retirement age, placing continued demand for increased labour force supply across growing employment sectors. For Norfolk County, the labour force participation rate is forecast to decline from approximately 60% to 58% between 2016 and 2036. It is important to recognize that these forecast trends in national and regional labour force participation rates, prepared by Statistics Canada, embrace stronger population growth associated with higher immigration.

Overall, this trend is anticipated to place continued downward pressure on employment growth rates across Canada, including Norfolk County where labour force supply cannot keep pace with demand. Continued labour force shortages in key employment sectors related to the housing sector, such as construction, skilled trades, engineering and public administration, are likely to limit Norfolk County's ability to achieve a higher growth forecast beyond the recommended High Growth Scenario, particularly in the first 10 years. To better monitor growth trends on an annual basis, it is recommended that the County develop a growth monitoring tool to track actual population, housing and employment growth against the County's long-term growth scenarios.



Source: Adapted from Statistics Canada. Insights on Canadian Society. The labour force in Canada and its regions: Projections to 2036, by Laurent Martel, March 20, 2019. Data from Statistics Canada, Labour Force Survey, 1976 to 2017; Demosim microsimulation model, 2017 (2036). Figure by Watson & Associates Economists Ltd.



# Chapter 3

## County-wide Growth Allocation Options



### 3. County-wide Growth Allocation Options

This section provides a summary of four population, housing and employment growth allocation options for the County. These options are based on the Reference and High Growth Scenarios presented in the Phase 1 report and are outlined herein in section 2. A varying set of assumptions regarding growth allocation, housing mix by structure type and intensification targets are applied to the growth forecast to arrive at the options.

#### **Option 1 (Base Case)**

The Base Case Option (Option 1) is provided in the Norfolk County Phase 1 report. Option 1 assumes the Medium Growth Scenario and allocates population and employment generally in accordance with past trends and housing supply opportunities within the County. Option 1 is not recommended for further consideration since it is premised on the Medium Growth Scenario which is no longer identified as the recommended County-wide growth scenario.

#### **Option 2A (Higher Growth/Growth Allocations Aligned to Land & Planned Servicing Capacity)**

Option 2A is based on the High Growth Scenario presented in the Phase 1 report, which has been briefly summarized herein (refer to Chapter 2). The intensification target assumed for this option is aligned with the County's current O.P. at 25% and follows a similar housing mix by structure type as Option 1. Allocations by urban settlement area take into consideration land availability as well as proposed servicing capacity (including all proposed upgrades/expansions) according to the County's Servicing Monitoring Report for Water and Wastewater, and the information on Inter Urban Water Supply timelines. <sup>[1], [2]</sup>

Building on the results of the Phase 1 report, it is recognized that both the County's urban settlement areas and rural areas have a role to play in accommodating future development subject to available land supply, supporting infrastructure and scale of

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<sup>[1]</sup> Norfolk County Information Memo – Servicing Monitoring Report – Water and Wastewater EIS-22-077 dated September 20, 2022.

<sup>[2]</sup> Norfolk County Inter-Urban Water Supply Program Phase and Timeline Data, as of January 2023.



development. Accordingly, approximately 800 new permanent and seasonal housing units have been allocated to the County's hamlets and remaining rural areas between 2021 and 2051. Under all options, including Option 2A, the absolute number of housing units allocated to the County's rural areas is the same as Option 1. It is assumed that the additional growth under this option will be directed to serviced urban areas.

### **Option 2B (Higher Growth and Allocations Aligned to Available Servicing Capacity)**

Option 2B is premised on similar parameters as Option 2A summarized above. The growth allocations in this option, however, are further focused towards the urban settlement areas of Delhi, Simcoe and Waterford, which have available municipal water and wastewater servicing capacity. Option 2B allocates urban growth in the areas that have sufficient available water/wastewater capacity (Delhi, Simcoe and Waterford), and assumes lower growth in Port Dover and Port Rowan where there is a need for servicing upgrades and expansions.

### **Option 3 (Higher Growth and High Intensification)**

Option 3 assumes a similar growth allocation to Option 2B under the High Growth Scenario but assumes a higher intensification rate of 35%. Accordingly, the housing mix by structure type under Option 3 is shifted further towards medium- and high-density forms. The allocation to the County's rural settlement areas and remaining rural areas is similar to Options 1 and 2B.

Figure 8 provides a summary of the growth allocation options, and Figure 9 shows the allocation of housing for each of the County's settlement areas under each option.



Figure 8  
Norfolk County  
Overview of Growth Options

	Option 1	Option 2 (A&B)	Option 3
Population (2021-2051)	19,400	23,300	23,000
Housing (2021-2051)	Total Units: 8,300 Low Density: 60% Medium Density: 25% High Density: 15%	Total Units: 9,600 Low Density: 60% Medium Density: 25% High Density: 15%	Total Units: 9,600 Low Density: 53% Medium Density: 29% High Density: 18%
Intensification % (2021-2051)	25%	25%	35%

Figure 9  
Norfolk County  
Housing Allocations by Urban Settlement Area Under Varying Growth Options

Area	Total (2021 to 2051)				Difference compared to 2021 Report			Percentage (2021 to 2051)			
	Reference Scenario	High Scenario			Option 2A vs Option 1	Option 2B vs Option 1	Option 3 vs Option 1	Reference Scenario	High Scenario		
	Option 1	Option 2A	Option 2B	Option 3	1	1	1	Option 1	Option 2A	Option 2B	Option 3
Courtland	50	150	320	335	100	270	285	1%	2%	3%	3%
Delhi	800	1,230	2,040	2,070	430	1,240	1,270	10%	13%	21%	22%
Port Dover	2,240	2,110	1,030	1,030	(130)	(1,210)	(1,210)	27%	22%	11%	11%
Port Rowan	610	570	480	320	(40)	(130)	(290)	7%	6%	5%	3%
Simcoe	2,540	3,450	3,440	3,530	910	900	990	30%	36%	36%	37%
Waterford	1,260	1,260	1,520	1,545	-	260	285	15%	13%	16%	16%
Hamlets and Rural	820	820	770	770	-	(50)	(50)	10%	9%	8%	8%
<b>Total</b>	<b>8,330</b>	<b>9,600</b>	<b>9,600</b>	<b>9,600</b>	<b>1,270</b>	<b>1,270</b>	<b>1,270</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Watson & Associates Economists Ltd., 2023.



# Chapter 4

## Residential Land Needs by Urban Settlement Area, 2023 to 2048



## 4. Residential Land Supply and Land Needs by Urban Settlement Area, 2023 to 2048

This section provides an overview of residential supply opportunities and 25-year land needs in the County's urban settlement areas. The existing land supply within existing settlement boundaries for the six designated urban areas of the County was conducted by County Staff. The analysis identified greenfield as well as intensification opportunities and housing unit potential within the existing designated residential lands within the County. Based on the assessment, the County has a supply potential of 9,316 units of which 1,212 units (13%) are within built boundary or intensification units and the remaining 8,104 units (87%) are within greenfield areas (refer to Figure 10).

Building on the growth allocations options discussed in Chapter 3, Figure 11 provides a comparison between forecast housing demand from 2023 to 2048 against available housing supply by urban settlement areas of the County. This analysis focuses on residential land needs within the County's primary urban greenfield areas.

As summarized in Figure 11, the County has a more than sufficient supply of designated, vacant, urban residential greenfield lands at the County-wide level to accommodate anticipated greenfield housing demand over the next 25 years. It is noted, however, that potential urban land supply deficits exist within Delhi and Waterford under Growth Allocation Options 2A, 2B and 3, and a small deficit exists in Simcoe under option 2B.<sup>[1]</sup> For Delhi, an urban residential deficit ranging between 27 and 77 gross developable hectares (ha) has been calculated. For Waterford, an urban residential deficit ranging between 19 and 34 gross developable ha has been calculated. For Courtland, an urban residential deficit of approximately 8 to 9 gross developable ha has been calculated.

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<sup>[1]</sup> Detailed land supply information has been prepared by the County.



Figure 10  
Norfolk County  
Land Supply Summary by Urban Settlement Area

Intensification		Greenfield	
Site Specific Intensification Opportunities	Housing Units	Designated Future/Pending	Housing Units
Delhi	5	Delhi	422
Courtland	-	Courtland	149
Port Dover	29	Port Dover	1,851
Port Rowan	28	Port Rowan	842
Simcoe	6	Simcoe	246
Waterford	17	Waterford	240
Total	85		3,750
Registered Vacant		Registered Vacant	
Delhi	54	Delhi	4
Courtland	-	Courtland	3
Port Dover	217	Port Dover	10
Port Rowan	31	Port Rowan	-
Simcoe	93	Simcoe	36
Waterford	127	Waterford	65
Total	522		118
Draft Approved		Draft Approved	
Delhi	6	Delhi	59
Courtland	-	Courtland	0
Port Dover	-	Port Dover	732
Port Rowan	-	Port Rowan	128
Simcoe	9	Simcoe	1,285
Waterford	30	Waterford	195
Total	45		2,399
In Circulation/Under Review		In Circulation/Under Review	
Delhi	10	Delhi	147
Courtland	-	Courtland	13
Port Dover	270	Port Dover	1204
Port Rowan	-	Port Rowan	0
Simcoe	129	Simcoe	303
Waterford	151	Waterford	170
Total	560		1,837
<b>Intensification Total</b>	<b>1,212</b>	<b>Greenfield Total</b>	<b>8,104</b>

Source: Supply data prepared by Norfolk County Staff, May 2023.



Figure 11  
Norfolk County  
Land Needs (Hectares) by Urban Settlement Area (Greenfield Areas Only), Options 1 to 3

Growth Option		Courtland	Delhi	Port Dover	Port Rowan	Simcoe	Waterford	Total Urban Greenfield
Total Supply of Housing Units in Greenfield Areas		165	632	3,797	970	1,870	670	8,103
Option 1	2023-2048 Forecast*	36	540	1,473	399	1,219	888	4,532
	Housing Unit Shortfall/ Surplus	129	92	2,324	571	651	(218)	3,571
	Residential Land Surplus/ Need (Gross ha)	12	9	216	53	60	(20)	332
Option 2A	2021-2048 Forecast*	114	921	1,254	359	1,826	876	5,330
	Housing Unit Shortfall/ Surplus	51	(289)	2,543	611	44	(206)	2,773
	Residential Land Surplus/ Need (Gross ha)	5	(27)	236	57	4	(19)	257
Option 2B	2021-2048 Forecast*	246	1,461	491	285	1,863	1,034	5,380
	Housing Unit Shortfall/ Surplus	(81)	(829)	3,306	685	7	(364)	2,723
	Residential Land Surplus/ Need (Gross ha)	(8)	(77)	307	64	1	(34)	253
Option 3	2021-2048 Forecast*	259	1,432	93	112	1,669	956	4,520
	Housing Unit Shortfall/ Surplus	(94)	(800)	3,704	858	201	(286)	3,583
	Residential Land Surplus/ Need (Gross ha)	(9)	(74)	344	80	19	(27)	333

\*Note: The above table presents the 25 Year housing supply vs. demand for housing units in only the greenfield areas within the County's urban settlement areas. The demand and supply that is anticipated to be met through intensification or infill opportunities has been excluded from the above table.

Source: Supply data prepared by Norfolk County, forecast by Watson & Associates Economists Ltd., 2023.



# Chapter 5

## Summary of Stakeholder Expansion Requests



## 5. Summary of Stakeholder Expansion Requests

As of the time of writing, the County has received a total of 42 growth requests from various applicants, 27 of which are in the urban areas. Of these 27 requests, five pertain to conversion of Employment Areas to residential and 22 relate to the expansion of existing urban boundaries. The growth requests for urban area expansions would potentially add approximately 7,600 housing units to the overall supply over 530 gross developable hectares (ha).<sup>[1]</sup> Figure 12, below, summarizes the incremental greenfield housing demand forecast under the High Growth Scenario from 2021 to 2051 against the available supply of greenfield housing units.<sup>[2]</sup> As shown in Figure 12, Norfolk County's urban greenfield areas are anticipated to have a County-wide housing surplus of approximately 1,700 units over the 25-year horizon. This surplus is excluding the urban area expansion requests summarized above. This equates to an approximately 38-year supply of greenfield housing. Including all urban expansion requests in the County's potential urban greenfield land supply would increase the County's potential housing supply surplus to 9,250 units over the 25-year planning horizon. This would equate to approximately 43 years of supply of additional greenfield housing, totaling 81 years of County-wide urban residential land supply under the High Growth Scenario.

As previously noted in Chapter 4, the County's urban land needs are not homogenous by urban settlement area. Notwithstanding the calculated oversupply of designated urban land at the County-wide level, an expansion of the urban settlement boundaries in Delhi, Courtland and Waterford would potentially be supported under Options 2 and 3 (refer to Figure 11).

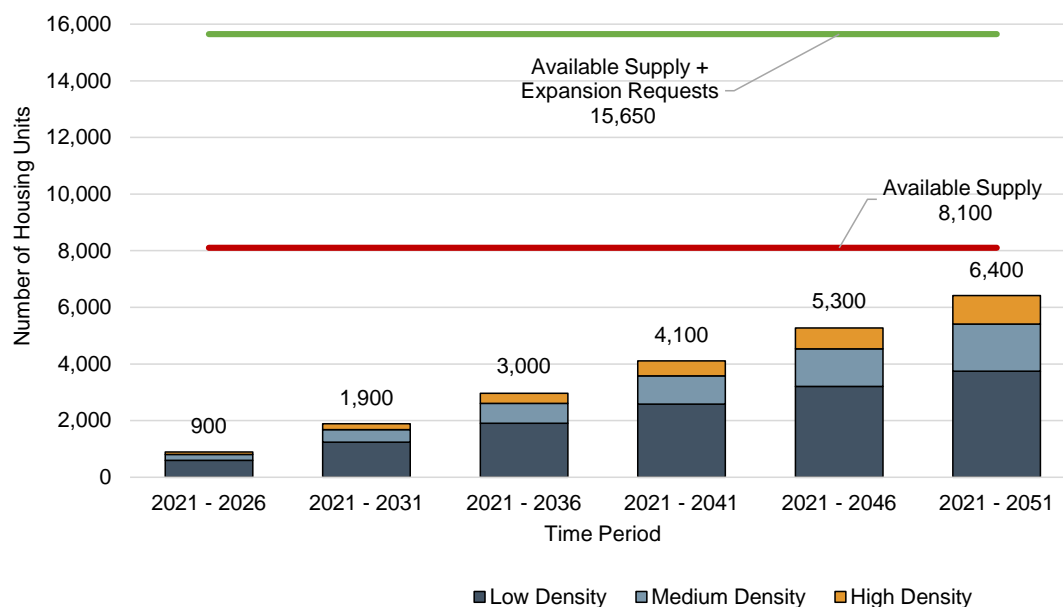
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<sup>[1]</sup> It is noted that this number represents information from only 11 out of 27 expansion requests concerning urban settlement area boundary expansion/conversion of employment to residential areas. The remaining requests do not provide a housing unit estimate. Accordingly, the housing unit estimate associated with urban expansion requests will increase further once a complete potential housing supply estimate for remaining applications is considered.

<sup>[2]</sup> The housing demand and supply presented in this section are based on a 25% intensification rate. If the County chooses to adopt a higher intensification rate, this would place downward pressure on greenfield housing demand and the overall surplus will increase. 5



Figure 12  
Norfolk County  
Available Supply + Expansion Requests Compared to Forecast in Greenfield Areas  
(High Growth Scenario)



25 Year County-wide Housing Surplus in Greenfield Areas Including Expansion Requests - **9,250 Housing Units**

25 Year County-wide Housing Surplus in Greenfield Areas (Excluding Expansion Requests) - **1,700 Housing**

Note: The figure represents the total greenfield housing demand under the High Growth Scenario. The numbers presented herein have been adjusted for intensification of demand and supply.

Source: Supply data prepared by Norfolk County; forecast by Watson & Associates Economists Ltd., 2023.



# Chapter 6

## Conclusions – Residential Growth Scenarios and Urban Land Needs Assessment



## 6. Conclusions: Residential Growth Scenarios and Urban Land Needs Assessment

The following key observations are presented in this report with respect to the County's long-term urban residential land needs:

- Based on the assessment of macro-economic and regional growth trends and drivers provided herein, it is recommended that the High Growth Scenario is utilized as the County's population growth forecast for long-range planning purposes for the County.
- On a County-wide level, there is a surplus of vacant designated residential land supply to accommodate the High Growth Scenario. In accordance with anticipated housing demand under the High Growth Scenario, the County currently has close to a 40-year supply of vacant, designated, greenfield housing. Notwithstanding this calculated oversupply, potential mismatches between forecast urban demand and supply by urban settlement area exist. For Delhi, an urban residential deficit ranging between 27 and 77 gross developable ha has been calculated. For Waterford, an urban residential deficit ranging between 19 and 34 gross developable ha has been calculated. For Courtland, an urban residential deficit of approximately 8 to 9 gross developable ha has been calculated.
- Based on a detailed review of each residential growth option for the County, Option 2B is recommended. This option represents an appropriate target of housing growth through residential intensification while maximizing existing water and wastewater capacity to the Delhi, Simcoe and Waterford.
- This report represents a foundational analysis based on an overview of available urban land supply, forecast housing demand and municipal servicing capacity. Further analysis is recommended to test and evaluate growth option 2B based on a range of planning, financial/land economics, infrastructure development criteria. Additional evaluation will also be required to determine the preferred location option for urban expansion (if deemed required).



# Chapter 7

# Regional Economic Analysis



## 7. Regional Economic Analysis

As previously noted, this report explores a series of employment growth allocation options within the context of the High Growth Scenario for Norfolk County. This analysis draws from a review of local employment land supply and demand factors and local population growth rates which are anticipated to influence the location of employment growth and Employment Area land needs within the County over the next 25 years.

### 7.1 Key Industrial Sectors / Clusters in Regional Economy Surrounding Norfolk County

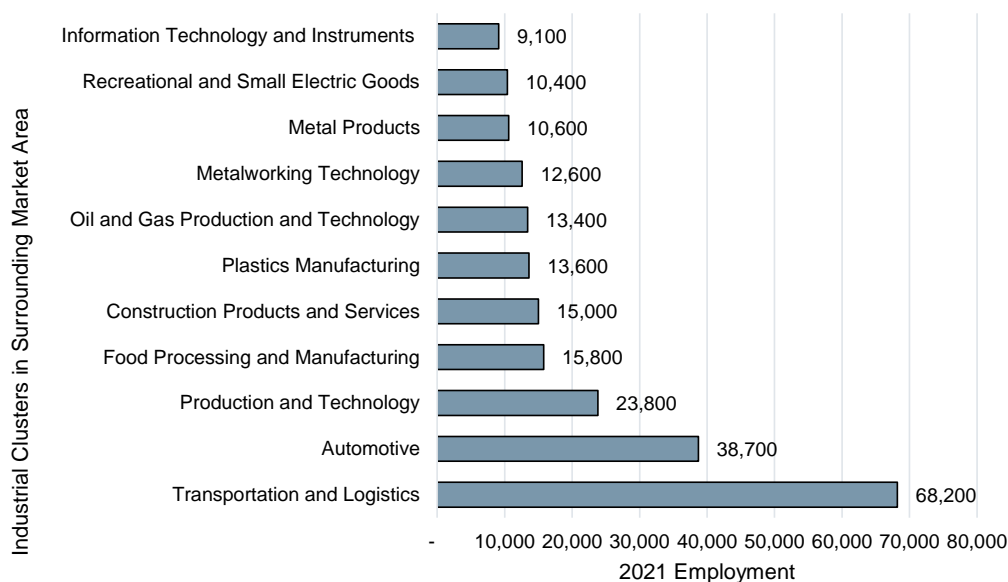
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Norfolk County's long-term population and employment growth potential is largely tied to employment opportunities with the County and surrounding market area (i.e. commuter-shed). The employment base can be grouped into two broad categories – export-based sectors and community-based sectors. The latter primarily refers to local population serving employment. Export-based sectors are comprised of geographically clustered industries which produce goods or services that reach markets outside the community such as manufacturing, research and development, as well as other knowledge-based industries. Ultimately, the aggregate indicators of the regional economic performance are determined in large measure by the competitiveness of their industry clusters.

Figure 13 illustrates the top traded employment clusters within the regional economy surrounding Norfolk County. As demonstrated, the surrounding market area has a robust economy which includes a number of traded employment clusters, most notably transportation and logistics, automotive, as well as production and technology. These industry clusters are typically accommodated in Employment Areas (i.e. industrial areas).



Figure 13  
Regional Economy Surrounding Norfolk County [1]  
Largest Industrial-Type Traded Employment Clusters



[1] Includes Brantford C.M.A. (Brant/Branford), Kitchener-Waterloo-Cambridge (K-W-C), Guelph, Hamilton, Woodstock, Ingersoll and Norfolk. Data is not available for Haldimand County since it does not have a C.A. or C.M.A.

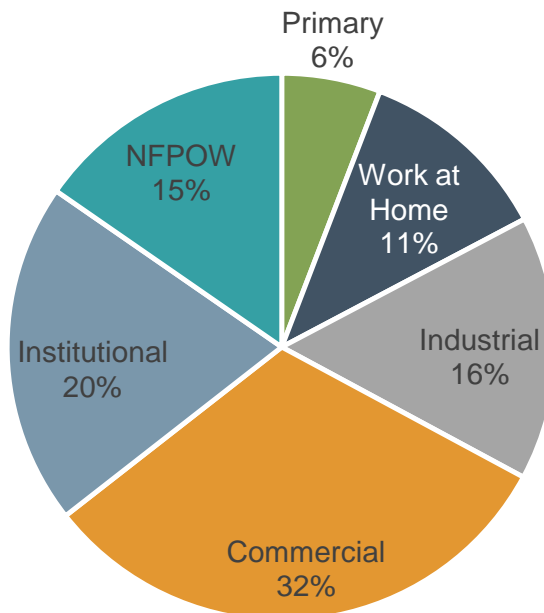
Source: Derived from Statistics Canada, The Canadian Cluster Map Portal, 2023 by Watson & Associates Economists Ltd.

## 7.2 Norfolk County Employment Growth Trends

As of 2023, the County's employment base has been estimated at 25,900 jobs. Figure 14 shows the distribution of the employment base by Sector. Just over 50% of the County's employment is within the commercial and institutional sectors. Industrial sector jobs comprise of 16% of the overall employment base in the County, followed by no fixed place of work and work at home employment with 15% and 11%. Primary employment comprises of 6% of County-wide employment.



Figure 14  
Norfolk County  
Employment Base 2023

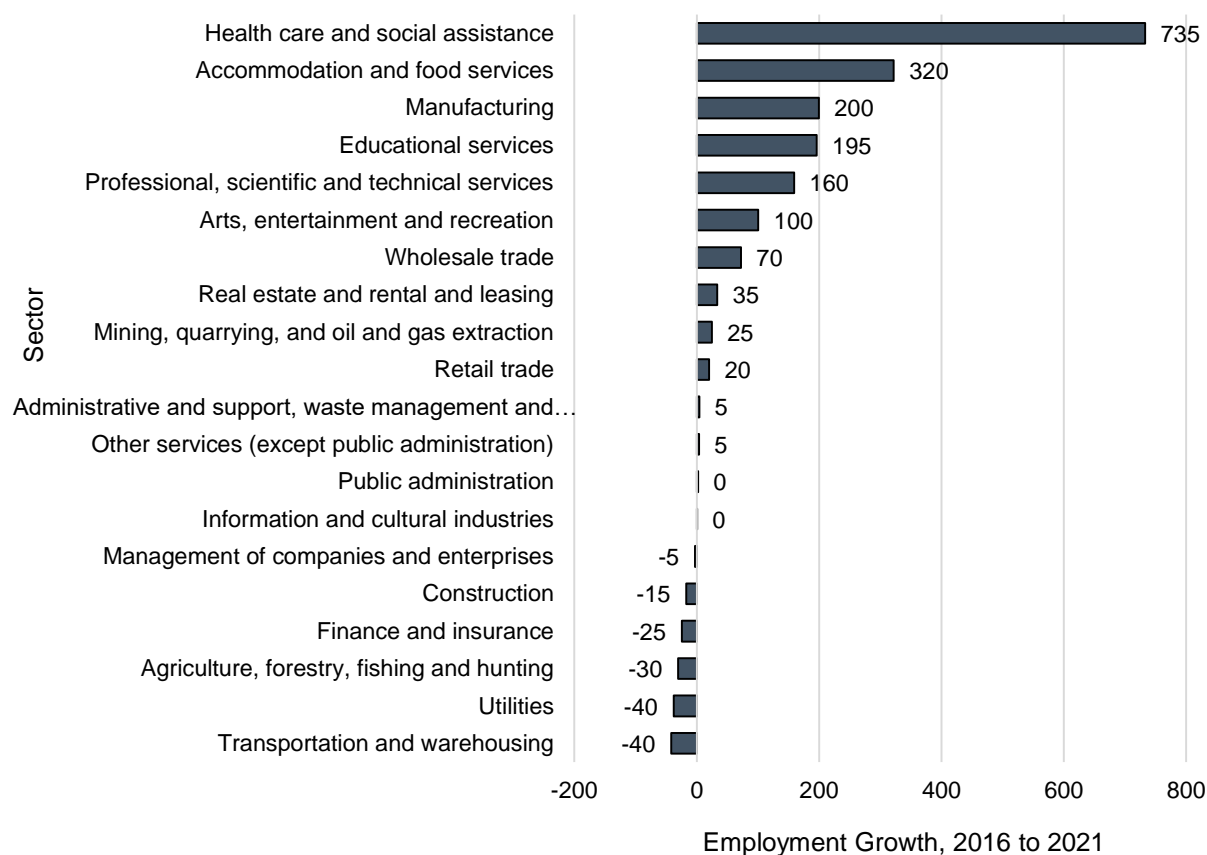


Source: Derived by Watson & Associates Economists Ltd, 2023.

The County's employment growth by sector between 2016 and 2021 is presented below in Figure 15. As shown in the figure, most employment sectors, particularly health care and social assistance, accommodation and food services, as well as manufacturing, have experienced positive employment growth. A few sectors, such as transportation and warehousing, utilities and agriculture sectors have experienced a loss in overall employment, though to a small degree.



Figure 15  
Norfolk County  
Employment Growth, 2016 to 2021



Source: Derived from EMSI data by Watson & Associates Economists Ltd.

Note: Figure includes employees and self-employed jobs. EMSI data may differ from Census data.



# Chapter 8

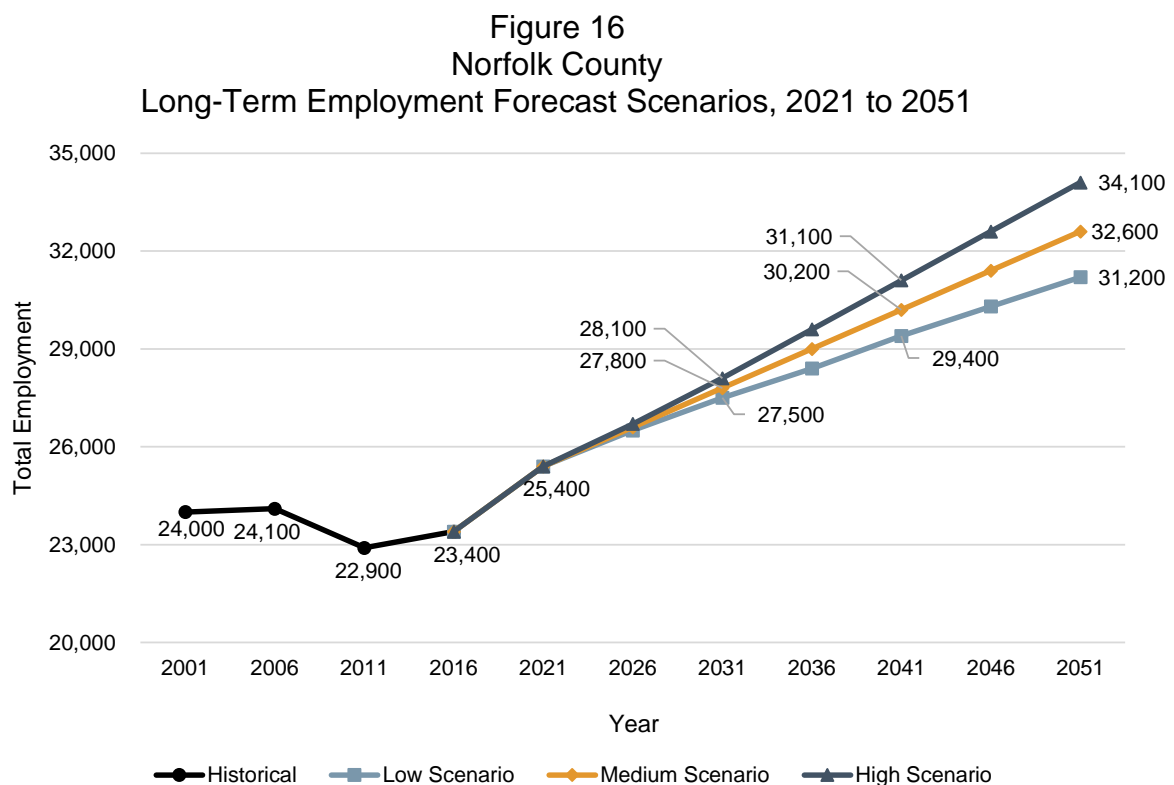
## Overview of Norfolk County Employment Growth and Allocations



## 8. Overview of Norfolk County Employment Growth and Allocations

As previously discussed, as a part of the Phase 1 long-term growth analysis study, a range of demographic and economic drivers were assessed in arriving at three long-term growth scenarios for the County. Figure 16 provides a comparison of the Medium and High Growth Scenarios. Under the Medium Growth Scenario, Norfolk County's employment is forecast to grow at an annual rate of approximately 0.8%.

This represents an average annual growth rate that is well above the historical growth rate of 0.3% achieved within Norfolk County from 2001 to 2016. Comparatively, under the High Growth Scenario, the County's employment is forecast to grow at an average annual rate of 1.3% per year. Under this scenario, the employment of Norfolk County is anticipated to grow by approximately 8,700 persons, increasing from 25,400 in 2016 to 34,100 by 2051.



Source: 2001 to 2016 from Statistics Canada Census, forecast by Watson & Associates Economists Ltd, 2023.



The employment allocation by sector is summarized in Figure 17. As shown in the figure, the highest share of employment growth (30%) is forecast in the commercial / population related employment sectors. This is followed by the No Fixed Place of Work (18%), institutional (16%), Work at Home (15%). The industrial sector is forecast to have a modest growth and about 15% of the overall county-wide employment forecast. It is noted that the industrial employment growth will have synergies with the broader regional economy, however, municipalities located along the Highway 401 and 403 corridors are anticipated to accommodate a significantly larger share of industrial employment in the surrounding region relative to Norfolk County. Provided below is a summary of the County's employment forecast by major sector/category (as previously summarized as part of the Phase 1 Study):

- **Primary Employment** – Primary industries (i.e. agriculture and other resource-based employment) comprised approximately 6% of the County's employment base (i.e. jobs) as of 2016. The County's Economic Development Strategy priorities which were approved by Council in July 2019 include the facilitation of new programs to support agricultural innovation, including a new agricultural innovation hub.<sup>[1]</sup> The County's agricultural sector draws considerable demand for seasonal workers, which has implications on housing needs within the County's urban and rural areas. <sup>[2]</sup> This employment sector is anticipated to experience a net employment growth over the 2016 to 2051 forecast period of approximately 500 jobs. It is important to note that primary employment is also captured in the work at home and no fixed place of work category. As such, total employment growth associated with the primary sector is anticipated to be considerably higher than the usual place of work employment numbers identified herein.
- **Industrial Employment** – The County's industrial sector is anticipated to increase by approximately 1,200 jobs over the 2016 to 2051 period, accounting for 13% of total County-wide employment growth. Industrial employment growth is primarily anticipated to be concentrated in sectors related to utilities,

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[1] Norfolk County Economic Development Strategy Review. Council Priority 2: Optimal Place for Business. Item A: Facilitate new programs to support agricultural innovation across Norfolk County, including a new agricultural innovation hub.

[2] The Haldimand-Norfolk Area has bunkhouse capacity for 5,524 farm workers, with an additional 190 bed bunkhouse recently built in Norfolk County.



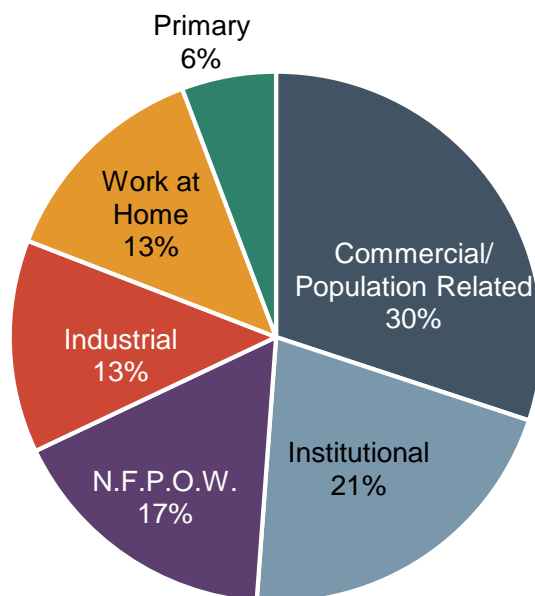
small/medium-scale manufacturing, construction, wholesale trade and transportation and warehousing.

- **Commercial Employment** – Commercial/population-related employment (which includes the office and retail sectors) represents the County's largest major sector with respect to total employment. This sector is largely driven by demand generated from the local population base, including seasonal residents. Commercial employment growth is forecast to increase by approximately 2,800 jobs over the 2016 to 2051 period, accounting for 30% of total employment growth.
- **Institutional Employment** – Norfolk County is anticipated to add approximately 2,000 jobs to its institutional employment sector over the 35-year forecast period, representing 21% of total employment growth. This includes employment growth in education, health and social services and other institutional facilities (i.e., cultural, religious). The County is expected to experience an increase in demand for seniors' health facilities and services, including retirement homes, as well as other institutional-related development due to a growing but aging population base.
- **Work at Home** – In 2016, work at home employment accounted for approximately 12% of all jobs within Norfolk County. Looking forward, continued advances in technology and telecommunications are anticipated to further enable remote work patterns and ultimately increase the relative share of at home and/or off-site employment over the long term. As previously mentioned, demographics and socio-economics also play a role in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in Norfolk County will utilize technology to provide or supplement their income in more flexible ways in contrast to traditional work patterns. It is also likely that an increased number of working and semi-retired residents will be seeking lifestyles that will allow them to work from home on a full-time or part-time basis within Norfolk County as they transition from the workforce to retirement. Over the forecast period, work at home employment in the County is expected to expand by approximately 1,200 jobs (13%), largely driven by forecast employment growth related to knowledge-based occupations as well as primary employment, including and diversified on-farm uses.



- **No Fixed Place of Work (N.F.P.O.W.)** – Off-site employment accounted for 16% of jobs in 2016. This employment category is expected to continue to steadily grow within the County over the long-term, largely driven by labour force demands in the construction and transportation, warehousing and business service sectors. Over the forecast period, N.F.P.O.W. employment is expected to expand by approximately 1,600 jobs, 13% of the County's total employment forecast.

Figure 17  
Norfolk County  
Long-Term Employment Forecast Scenarios, 2016 to 2051

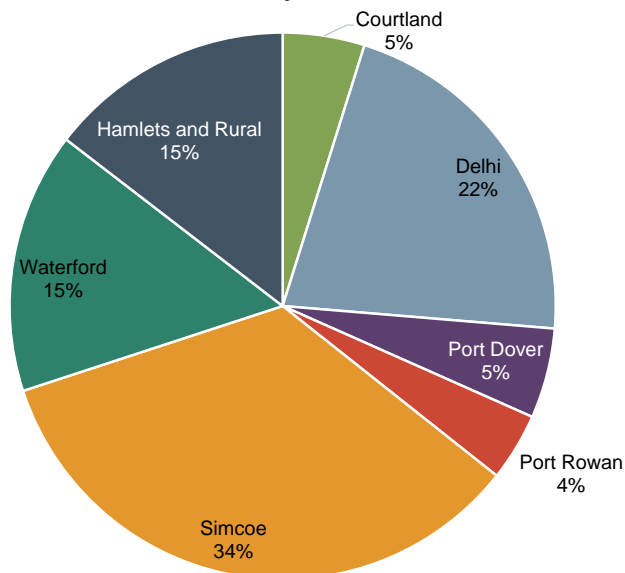


Source: Estimated by Watson & Associates Economists Ltd, 2023.

As previously discussed, based on a review of each residential growth option for the County, Option 2B is recommended. This option represents an appropriate target of housing growth through residential intensification while maximizing existing water and wastewater capacity to the Delhi, Simcoe and Waterford. Accordingly, to arrive at the employment growth allocations, housing / population allocations under Option 2B have been utilized. Figure 18 summarizes the allocation of employment for each of the County's settlement areas under reference scenario and the high growth scenario (Option 2B).



Figure 18  
Norfolk County  
Forecast Growth Allocation by Settlement Area, 2021 to 2051



Source: Estimated by Watson & Associates Economists Ltd, 2023.



# Chapter 9

## Employment Area Profile and Land Supply



## 9. Employment Area Profile and Land Supply

Norfolk County O.P. identifies two designations of employment areas, i.e. Protected Industrial and Industrial designated lands. The Protected Industrial areas are lands with high visual profile and accessibility and are generally comprised of industrial, employment, accessory commercial and related uses. Industrial Designation applies to older industrial sites that are under-utilized and poorly situated to attract new industrial investment. This section provides a summary of existing profile of the Employment Areas for each of the settlement areas of the County in terms of location, access, supply and parcel configuration, servicing capacity, as well as the key industries / sectors that have a presence in the Employment Areas.

### **Courtland**

Courtland has two Employment Areas within its urban boundary. The Employment Areas in Courtland are all designated Protected Industrial and have direct access and exposure to Highway 3 and County Roads. The settlement area has large contiguous vacant land parcels located in proximity to established industries. As discussed in Section 3 of this report, the settlement area of Courtland also has plans to upgrade its servicing capacity which enhances the viability of a broad ranges of employment uses. Existing employment uses include auto manufacturing, logistics, equipment suppliers, utilities, construction.



### **Delhi**

The Employment Areas in Delhi are located at the western and eastern ends of the settlement area boundary and have access to Highway 3 and County Road 59. The Employment Areas in the western part of the settlement area are largely built out, have smaller parcels and limited vacant supply. The eastern Employment Area has limited existing industrial development, and a larger vacant supply with more contiguous lands that can be developed. The settlement area also has sufficient existing and planned



servicing capacity, and the presence of a population base that provides access to labour. Key industries in Delhi's Employment Areas include agricultural manufacturing, auto dealers, service and repair.



### **Simcoe**

The Employment Areas in Simcoe, particularly Employment areas in the northern part of the settlement area, have proximity and access to Highway 3 and 24. The settlement area also has the advantage of having proximity to large Industrial and population base, with existing and planned servicing capacity. The Employment Area in the western part of the settlement area has larger vacant land parcels, however there may be some constraints due to natural features. East and South Employment Areas have limited availability with very few large parcels of vacant employment land. Key industries operating within the Employment Areas in Simcoe include manufacturing, auto parts, logistics, services, wholesale / retail commercial, transportation, utilities, construction, agricultural tools, recreational.



### **Waterford**

Waterford has Industrial designated lands at the western end of the Settlement area. These areas are located closer to residential uses and require access through residential areas. The lands designated Protected Industrial are located at the Southern



part of the Settlement Area and have direct access through County Road 9. These Industrial lands are also buffered from residential uses by commercial parcels. Lands designated Industrial are located towards the western part of the settlement area. These lands are located in close proximity to residential areas. There is limited vacant and buildable employment land availability within Waterford. Similar to Delhi and Simcoe, the settlement area has sufficient existing and planned servicing capacity available. Key sectors operating in the industrial area include manufacturing, auto parts and repair, logistics, services, commercial, waste management, construction.



A summary of vacant industrial lands has been provided to assist in guiding the amount and location of industrial employment growth across the County over the long term. Ensuring a sufficient vacant employment lands inventory is critical to the County as the supply and quality of vacant industrial lands can have a direct influence on the location of non-residential development as well as the economic competitiveness of the County over the long term. Based on the most recent inventory of urban industrial land provided by settlement area, Norfolk County has a total of approximately 187 gross ha (462 gross acres) of vacant, designated industrial land, as outlined in Figure 19. A further summary of vacant land supply mapping has been provided in Appendix A.

In addition to vacant lands, some of the employment growth within the Employment Areas is anticipated to occur on existing underutilized lands. Intensification on employment lands can take a number of forms, including development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization resulting in higher employment density on occupied employment lands. Higher land utilization on existing employment lands can



also lead to more effective use of existing infrastructure (e.g. roads, water/sewer servicing), resulting in communities that are more functional and complete.

In total, there are approximately 4.4 ha or 10 sites in the County's urban Employment Areas that are considered underutilized. It has been estimated that about 5% of the employment growth will occur on through intensification (discussed in Chapter 10).

Figure 19  
Norfolk County  
Summary of Gross Vacant and Net Vacant Urban Industrial Lands (Employment Lands)  
by Settlement Area

Community	Gross Vacant Employment Lands <sup>1</sup> (ha)	Net Vacant Employment Lands (ha) <sup>2</sup>	Market Vacancy Adjustment (ha)	Net Vacant Employment Land Adjusted for Market Vacancy (ha)
Courtland	66.3	50.4	7.6	42.8
Delhi	45.1	34.8	5.2	29.5
Simcoe	74.9	61.8	9.3	52.5
Waterford	1.0	1.0	0.1	0.8
Grand Total	187.3	147.9	22.2	125.7

Source: Vacant industrial land inventory provided by Norfolk County, 2023.

[1] Excluding Natural Heritage & Non-Buildable lands (ha).

[2] Assumes 25% of the vacant land area net environmental features is required for roads and other internal infrastructure on sites greater than 4 ha in area.

Note: 15% long-term vacancy has been used. Numbers may not add due to rounding.

Source: Data provided by Norfolk County, presented by Watson & Associates Economists Ltd., 2023.

As shown in Figure 20, of the total 187 gross ha of designated vacant employment lands identified herein, approximately 126 ha are considered available and developable after adjusting for environmental and servicing constraints, internal infrastructure (e.g., local roads, stormwater management facilities, local environmental features, open space, etc.) as well as long-term land vacancy. Of the total net vacant, developable urban industrial land identified within the County, approximately 34% or 43 ha is located in the Courtland, followed by 23% in Delhi, 42% in Simcoe and 1% in Waterford. The remaining urban settlement areas have a limited supply of available vacant employment lands.



A downward adjustment of 15% has been made to the net vacant employment land supply to account for long-term land vacancy. This adjustment for long-term employment land vacancy represents sites that are unlikely to develop over the long term (i.e., 2021 to 2051) due to odd/small lot sizes and poor configuration, as well as underutilized employment sites, sites that may have long-term development constraints and inactivity/land banking which may tie up potentially vacant and developable lands. Long-term land vacancy is a common characteristic experienced in industrial areas throughout the County, the Province, and beyond. For the purposes of this analysis, an estimated 15% long-term land vacancy has been assumed.

Figure 20 shows the area of vacant parcels by size category. The majority of the designated urban employment parcels are less than one ha in size, yet the greatest share of the designated employment land supply (about 62% of the overall supply) is accommodated on six parcels greater than 10 ha<sup>[14]</sup>.

Figure 20  
Norfolk County  
Vacant Employment Land Supply by Parcel Size

Area Category	Area (Net ha)	% of Total Area	Number of Parcels	% of Parcel Count
<b>Less than 1 ha</b>	6.0	4%	13	37%
<b>1 - 2 ha</b>	10.7	7%	7	20%
<b>2 - 5 ha</b>	13.2	9%	5	14%
<b>5 - 10 ha</b>	26.5	18%	4	11%
<b>Greater than 10 ha</b>	91.6	62%	6	17%
<b>Total</b>	147.9		35	

Note: Numbers may not add precisely due to rounding.

Source: Data as of January 2023 from Norfolk County, presented by Watson & Associates Economists Ltd., 2023.

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<sup>[14]</sup> Of the County's vacant employment land parcels with a size of greater than 10 net ha, two parcels are present in each of Delhi, Courtland and Simcoe settlement areas.



# Chapter 10

## Employment Area Land Needs by Urban Settlement Area, 2023 to 2048



## 10. Employment Area Land Needs by Urban Settlement Area, 2023 to 2048

Over the 25-year planning horizon, the County's Employment Areas are anticipated to accommodate approximately 15% of the County's total urban employment growth, totaling about 1,000 employees between 2023 and 2048. In determining the County's long-term Employment Area land needs, it is important to understand existing employment densities for the County's Employment Areas. Determining the target densities for the County required a desktop review to understand the type of businesses operating in these areas as well as a comparison with surrounding municipalities of similar size and nature. Over the long-term planning horizon, the average Employment Area density for the County is forecast to average 7 jobs per net ha.

Figure 21 summarizes forecast Employment Area land needs for Norfolk County over the 25-year planning horizon. Comparing County's supply of designated, developable vacant Employment Areas by urban settlement area against forecast employment land demand generates a County-wide deficit of 52 gross ha (129 gross acres) by 2048. This includes a market contingency of an additional 15% of the land requirement to ensure the County has the flexibility to accommodate a range of employment uses. It is noted that the additional Employment Area lands are specifically needed in Delhi, Simcoe and Waterford, while existing supply is sufficient in Courtland, Port Dover and Port Rowan. It is noted that this identified gross Employment Area land need reflects additional land requirements associated with local infrastructure and (e.g., local roads, stormwater ponds, utility easements, etc.).

Norfolk County



### Forecast Employment Area Land Needs (Demand vs. Supply), 2023 to 2048

Area	Total Employment on Employment Lands	Intensification @ 5%	Employment Less Intensification	Density (Jobs / net ha)	Employment Area Land Demand (Net ha)	Add market Contingency @ 15%	Employment Area Land Supply (Net ha)	Land Need (Net ha)	Land Need (Gross ha)
Courtland	118	6	112	6	19	22	43	21	No Deficit
Delhi	271	14	257	8	32	37	30	-7	-10
Port Dover	0	0	0	-	-	0	0	0	No Deficit
Port Rowan	0	0	0	-	-	0	0	0	No Deficit
Simcoe	507	25	482	8	60	69	53	-16	-22
Waterford	104	5	99	7	14	16	1	-15	-20
<b>Total</b>	<b>1,000</b>	<b>50</b>	<b>950</b>		<b>125</b>		<b>126</b>	<b>-18</b>	<b>-52</b>

\* Excludes No Fixed Place of Work Employment

Source: Watson & Associates Economists Ltd., 2023



Figure 22 summarizes the average size of typical industrial areas (gross developable land area) within Norfolk County and the surrounding region. Based on this assessment, existing Employment Areas have been categorized into three size categories, i.e. small (9 ha to 25 ha), medium (30 ha to 84 ha) and large (96 ha to 151 ha). As depicted in the figure, an average size of 66 ha was observed for the Employment Areas within Norfolk County and the surrounding region. Accordingly, it is recommended that the County explore employment expansion areas that are comparable in size to existing small to medium industrial areas within the County and surrounding region. This will help ensure that new Employment Areas offer a critical mass to support a variety of industrial uses by sector, size and land use.



Figure 21  
Norfolk County  
Forecast Employment Area Land Needs (Demand vs. Supply), 2023 to 2048

Area	Total Employment on Employment Lands	Intensification @ 5%	Employment Less Intensification	Density (Jobs / net ha)	Employment Area Land Demand (Net ha)	Add market Contingency @ 15%	Employment Area Land Supply (Net ha)	Land Need (Net ha)	Land Need (Gross ha)
Courtland	118	6	112	6	19	22	43	21	No Deficit
Delhi	271	14	257	8	32	37	30	-7	-10
Port Dover	0	0	0	-	-	0	0	0	No Deficit
Port Rowan	0	0	0	-	-	0	0	0	No Deficit
Simcoe	507	25	482	8	60	69	53	-16	-22
Waterford	104	5	99	7	14	16	1	-15	-20
<b>Total</b>	<b>1,000</b>	<b>50</b>	<b>950</b>		<b>125</b>		<b>126</b>	<b>-18</b>	<b>-52</b>

\* Excludes No Fixed Place of Work Employment

Source: Watson & Associates Economists Ltd., 2023



Figure 22  
Norfolk County and Surrounding Areas  
Survey of Existing Employment Areas (Gross Developable Area in Hectares)

County	Employment Area	Gross Developable Area (Hectares)	Area Category
Norfolk	Delhi S	9	Small
Norfolk	Waterford	14	Small
Haldimand	Cayuga	16	Small
Norfolk	Delhi W	23	Small
Middlesex	Da Vinci Business Park, Thames Centre	25	Small
Norfolk	Simcoe S	30	Medium
Norfolk	Courtland E	46	Medium
Oxford	Tillsonburg - Van Norman Industrial Park	78	Medium
Norfolk	Delhi E	79	Medium
Norfolk	Courtland W	84	Medium
Norfolk	Simcoe E	96	Large
Haldimand	North Caledonia	121	Large
Oxford	Tillsonburg - Forest Hill Industrial Park	150	Large
Norfolk	Simcoe W	151	Large
Average Area		66 Ha	



# Chapter 11

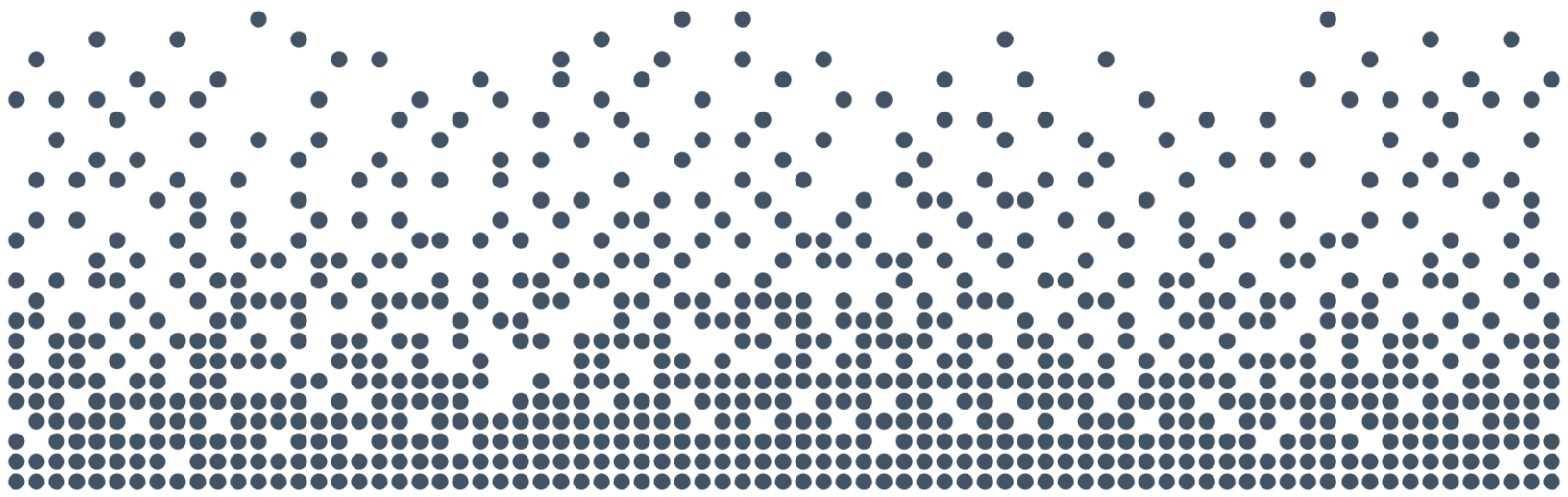
## Conclusions – Employment Area Land Needs



## 11. Conclusions - Employment Area Land Needs

The following key conclusions are provided with respect to the County's long-term Employment Area Land Needs:

- Based on the assessment of macro-economic and regional growth trends and drivers, it has been recommended that the High Growth Scenario is utilized as the County's employment growth forecast for long-range planning purposes for the County. Upon our examination of the residential growth options, Option 2B is recommended. Accordingly, the allocation of employment (particularly population related employment) has been updated based on growth option 2B.
- In accordance with the County's supply of designated, developable vacant Employment Areas located in urban settlement areas and forecast demand for these lands, a County-wide deficit of 52 gross ha (129 gross acres) has been identified by 2048. For Delhi, Simcoe and Waterford an urban employment deficit of 10, 22, and 20 gross ha has been calculated, respectively. Courtland has a surplus of 28 ha of vacant urban employment land. It is also noted that due to the absence of planned / vacant industrial land area in Port Dover and Port Rowan, these settlement areas are not anticipated to accommodate significant industrial employment growth over the forecast horizon.
- The County also has some Employment Areas under conversion pressure. As a next step, those areas will be assessed against a set of provincial planning and localized criteria to identify any sites that will be suitable for conversion from employment to non- employment uses.



# Appendices



# Appendix A

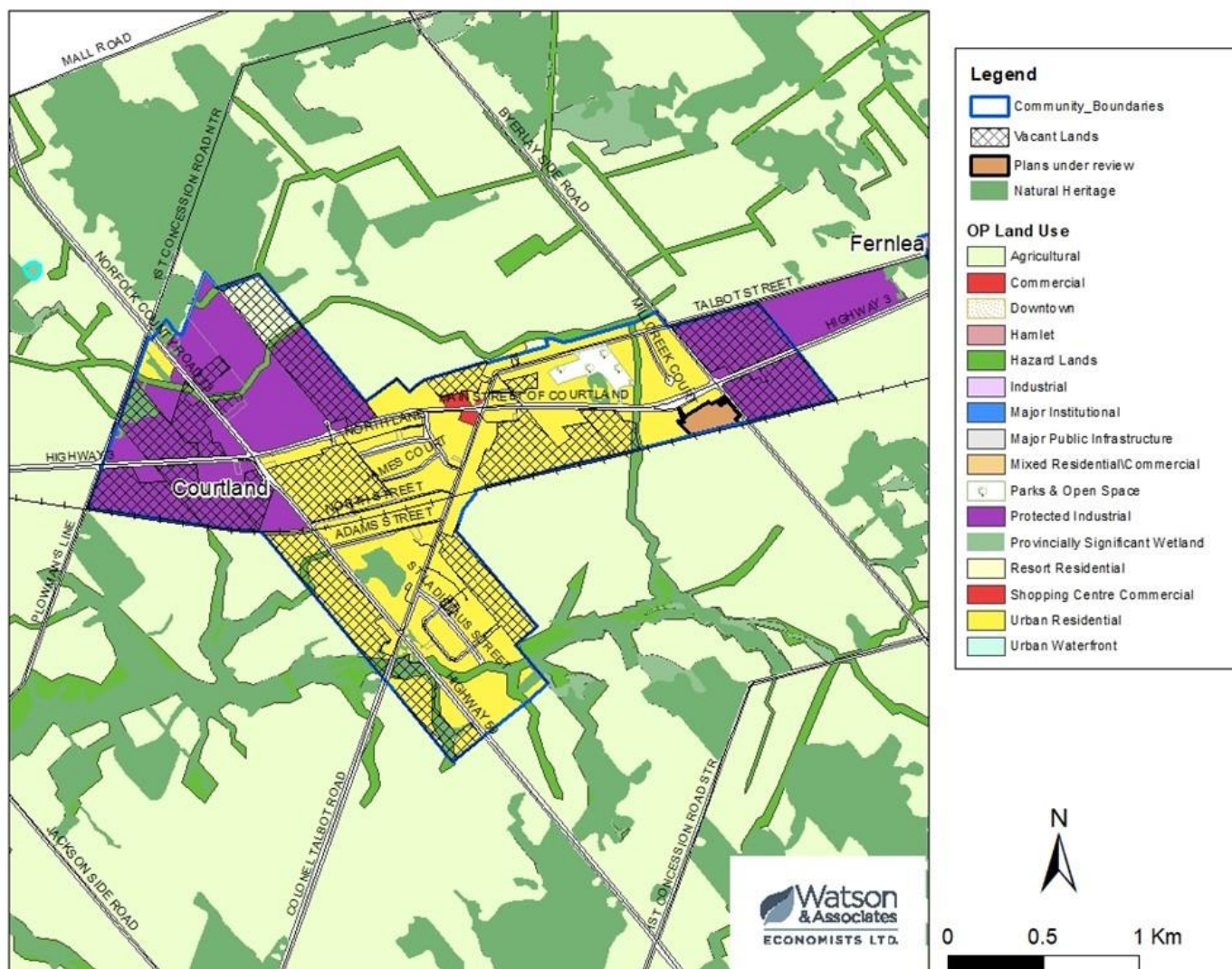
## Land Supply Mapping



## Appendix A: Land Supply Mapping for Urban Settlement Areas

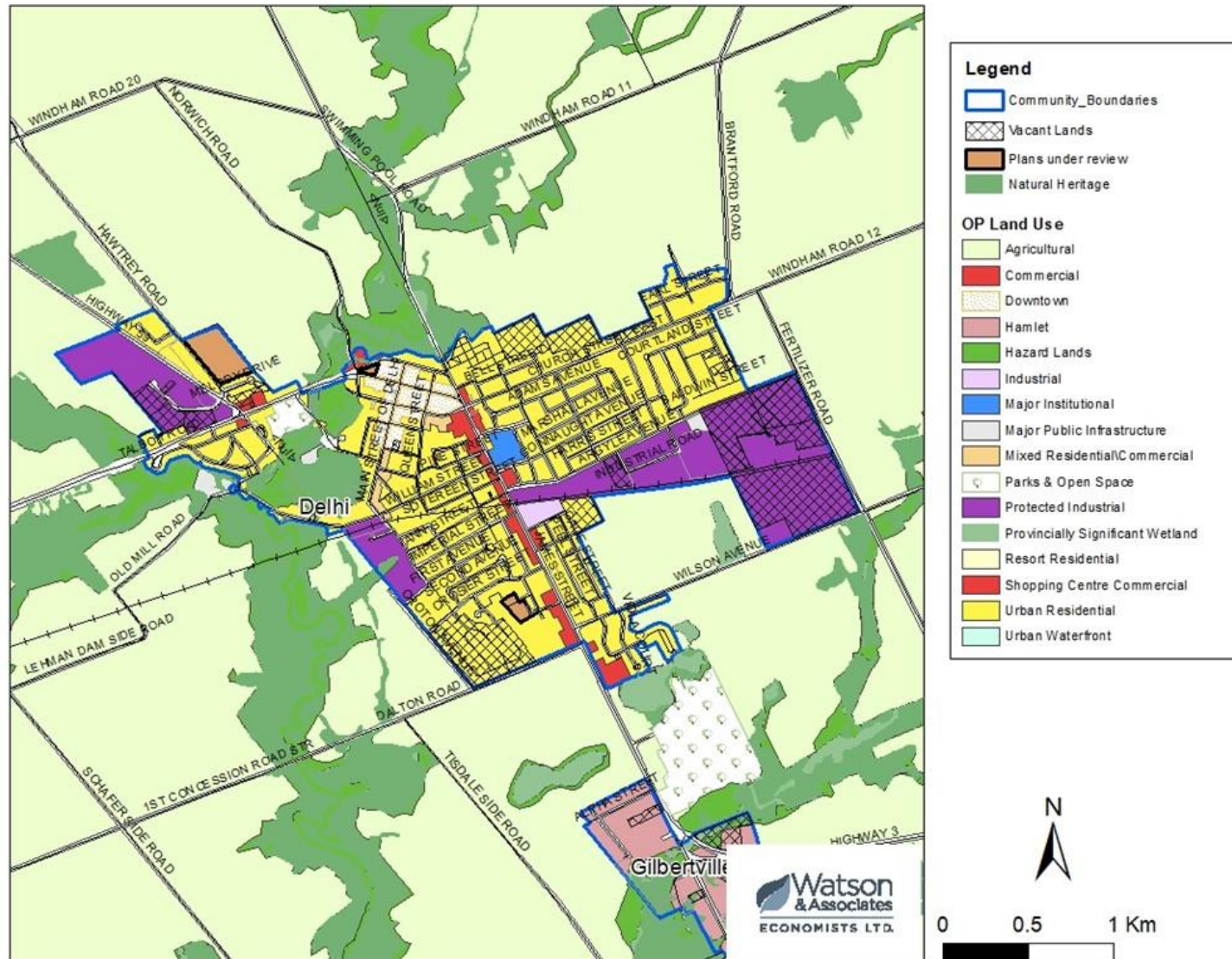


A-1: Vacant Residential and Non-Residential Lands in Courtland



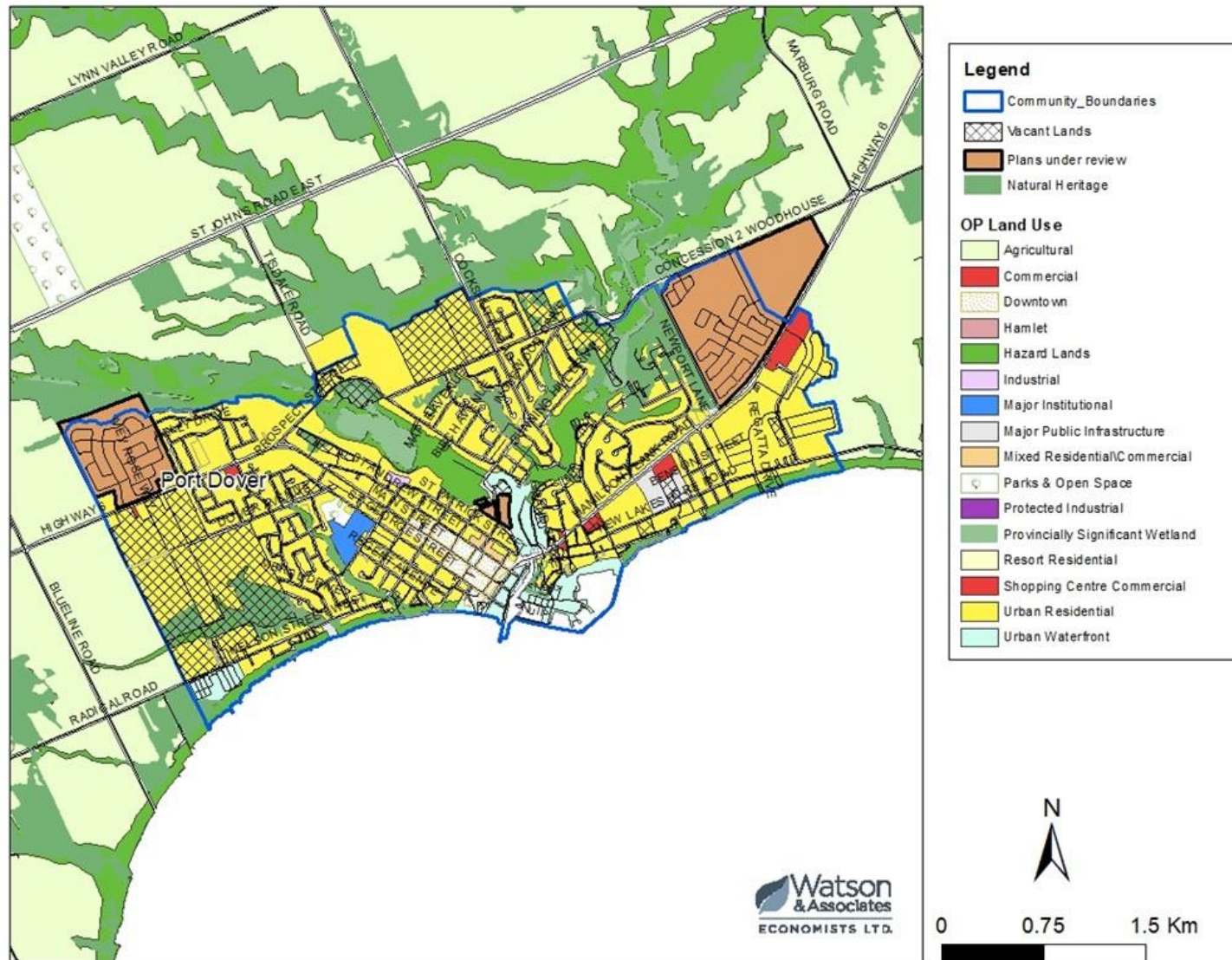


## A-2: Vacant Residential and Non-Residential Lands in Delhi



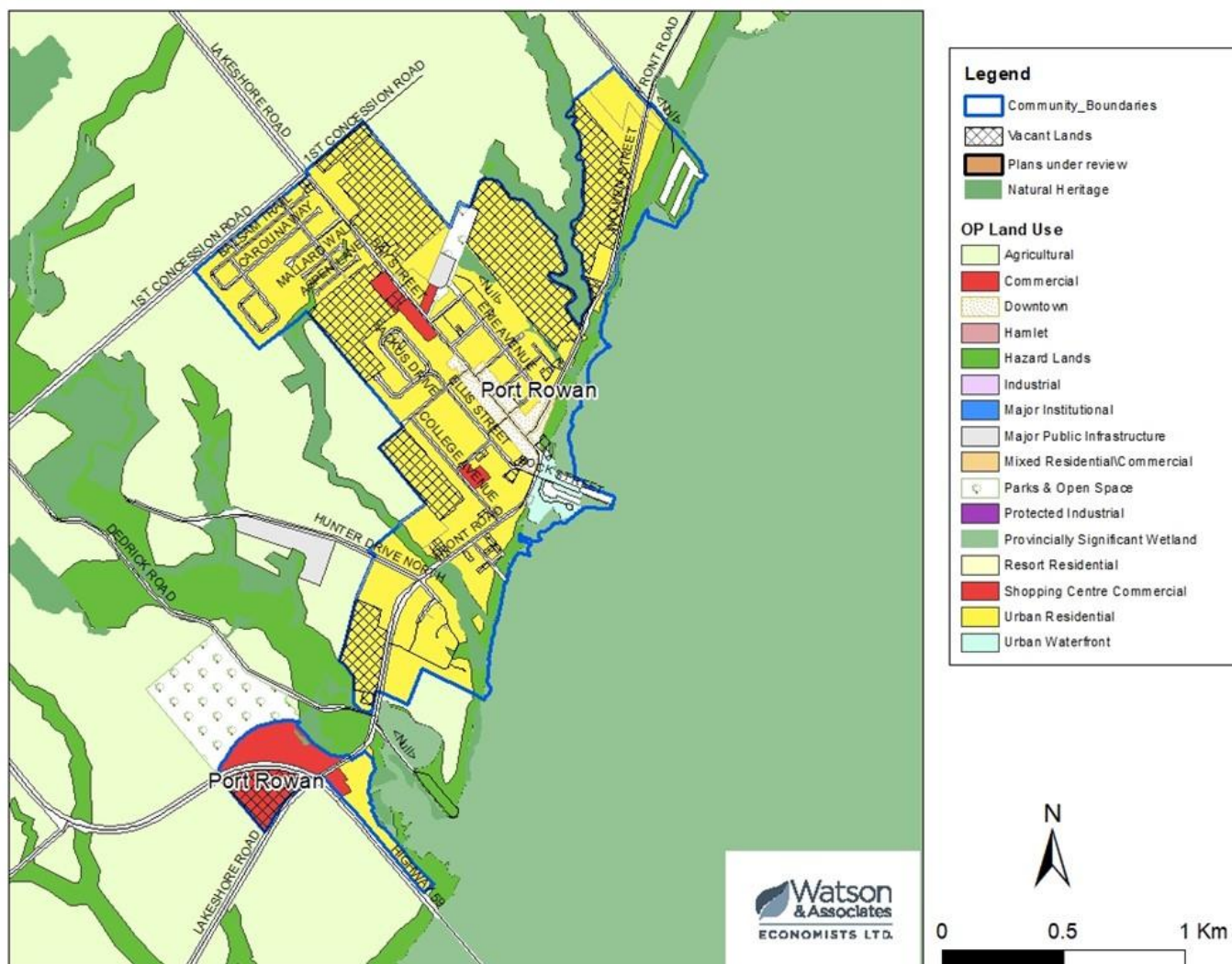


### A-3: Vacant Residential and Non-Residential Lands in Port Dover



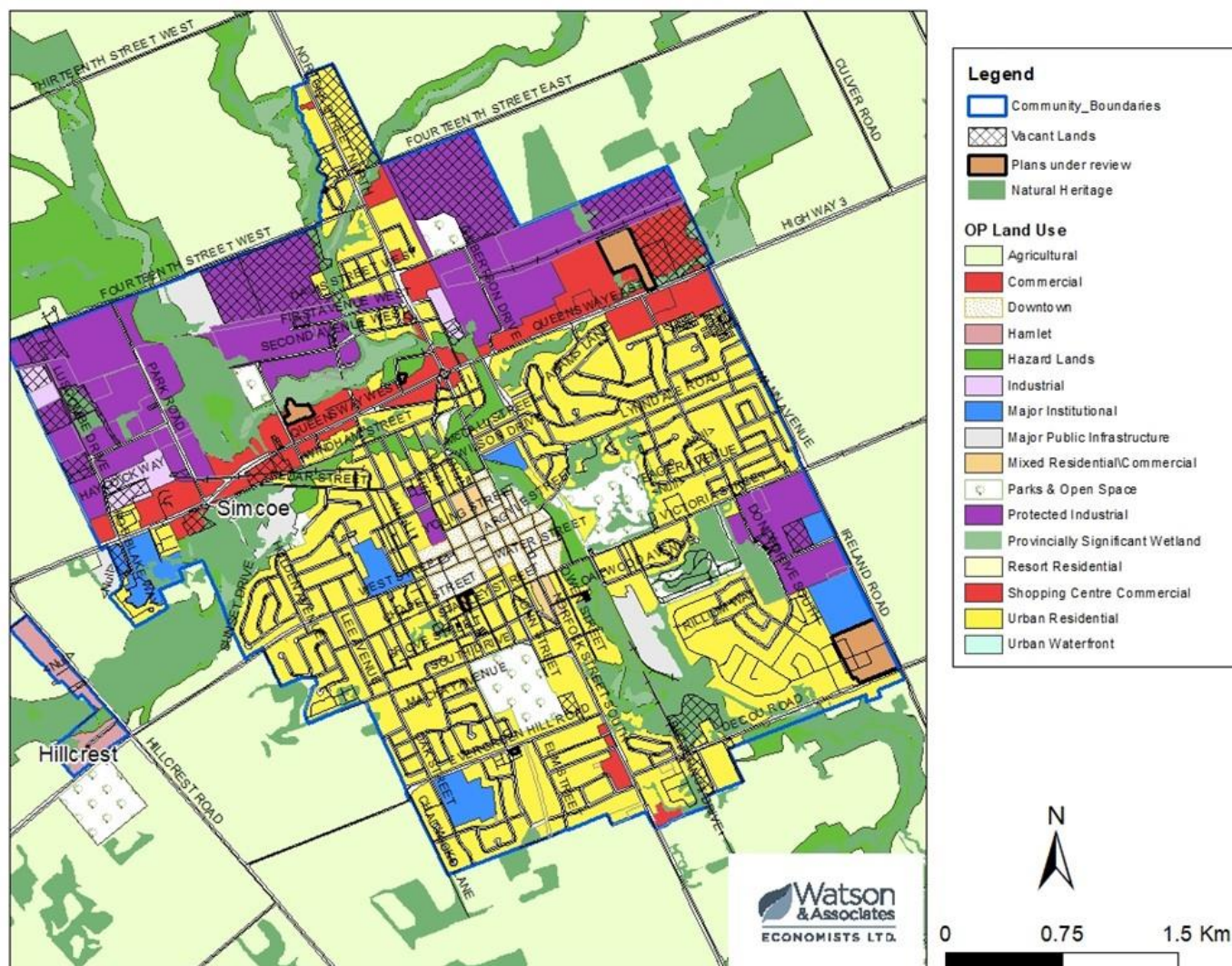


#### A-4: Vacant Residential and Non-Residential Lands in Port Rowan





A-5: Vacant Residential and Non-Residential Lands in Simcoe





A-6: Vacant Residential and Non-Residential Lands in Waterford

