Volume 4
Land Study and Options

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Norfolk County Planning Department

May 2023

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Introduction

Norfolk County continues to experience increased pressure to grow including expansion of various Settlement Area boundaries to accommodate residential and economic growth throughout the municipality. Recent changes to the policy framework at the Provincial level, through amendments to the *Planning Act* and an updated Provincial Policy Statement, 2020 (PPS), have introduced new planning concepts and permissions for municipalities to consider while developing policies and considering long range planning and growth.

To ensure that Norfolk County continues to plan for growth efficiently over the long-term, it is necessary to study the current population and economic demands and establish projections to appropriately evaluate future land needs as part of this comprehensive review study process. Before Norfolk County can determine where to accommodate the projected population and economic demands, it is necessary to study the current state of the County, compare the County's actual growth rate with the last population projections completed in 2014, and identify appropriate Norfolk's land needs until at least 2051.

A goal of the "Grow Norfolk" Growth Management Study was to establish growth management principles and to identify opportunities and options to accommodate appropriate and sustainable growth to 2051. The overall project will serve as a comprehensive municipal review to inform and support the next Official Plan Review and related policy review exercises.

1.0 Context

Norfolk County retained the services of Watson & Associates Economists Ltd. to assist staff with 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 Technical Memorandum entitled: Norfolk County Comprehensive Review – Growth Scenarios and Land Needs in relation to residential growth. This is a large component of and linked with Volume 4 – Land Study and Growth Options as is included as Attachment A. 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.

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This technical paper is intended to provide context, descriptions, and land supply information that when combined with other technical inputs and further analysis and recommendation reports will identify and coordinate growth options for the next twenty-five years.

2.0 Development Rates

A “Built Boundary Line” was previously established to delineate the extent of existing development at a point in time and is identified in the Norfolk Official Plan (2018). The Official Plan has a target that a minimum of 25% of growth in the “Urban Areas” should be accommodated through infill, intensification, and redevelopment (e.g., within the Built Boundary Line).

Infill, intensification, and redevelopment growth occurs within existing built-ups areas such as Downtowns/Central Business District areas, on vacant unbuilt lots or blocks, through replacement of a lower density use (e.g., single detached dwelling) with a higher density use (apartment) or changing a past use (e.g., old industrial site) to a new and/or higher density use (townhouses). For the purposes of this study, these will collectively be referred to as “Intensification.”

“Greenfield” areas include undeveloped land that is located within an existing settlement boundary but outside the Built Boundary Line. It has typically not been developed before and is generally used for agricultural purposes until it goes through the development process.

In Norfolk, over the past five years, overall, there has been a healthy combination of Intensification along with Greenfield development. Overall, there is an average annual rate of 42.5% intensification for the past 5 years. The following three figures provide further illustration of the development types between 2018-2022.

Figure 1: Summary of New 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
Total	**507**	**686**	**1193**	**42.5**

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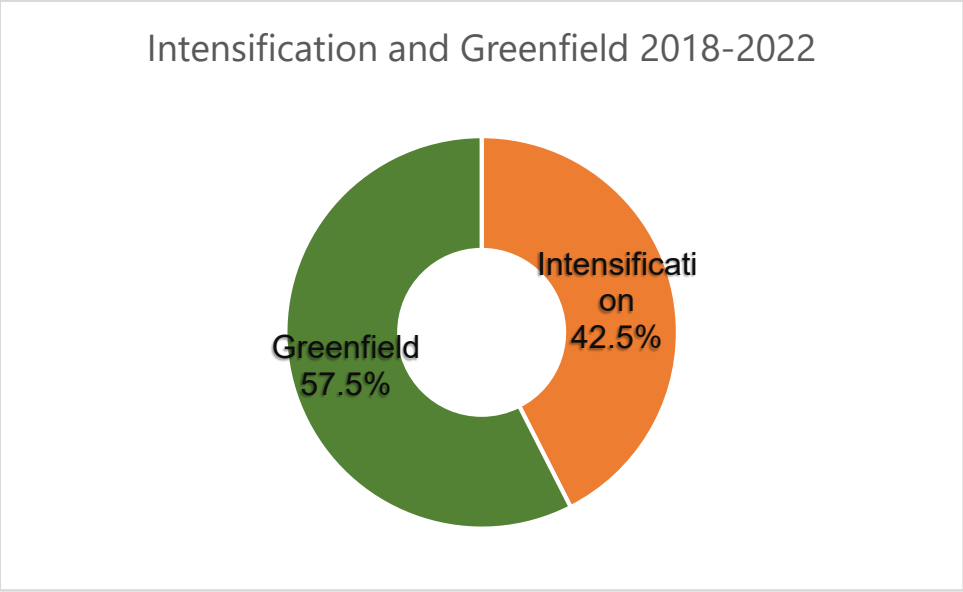
Figure 2: Average Five-Year Intensification and Greenfield Development (New Residential Dwellings) in Urban Areas, 2018-2022



Typically, in the early years of establishing a Built Boundary Line there are many vacant lots or blocks that are contained within that boundary line, and upon development are counted towards the overall Intensification level. As the vacant parcels are developed, that redevelopment is often contingent upon property consolidations or replacement of/addition to existing structures and sites, which can often be more challenging. Quite surprisingly, the Intensification rate was remarkably high (over 50% of new dwelling units) in the first few years after the new Official Plan was in effect. As expected, the rate has started to taper off; however, for multiple years the rate was quite substantial. The overall five-year average rate of 42.5% is significant in comparison to various other predominantly “rural” municipalities, including those outside of the Greater Golden Horseshoe (GGH) or even those in the outer (and inner) ring of the provincial GGH Growth Plan area.

The figure below shows the breakdown between Intensification and Greenfield development in terms of total new dwelling units through issuance of building permits in Norfolk over a five-year period from 2018 to 2022. The dwelling unit types ranges over this time period with recent years seeing an increase in the number of townhouse and apartment units.

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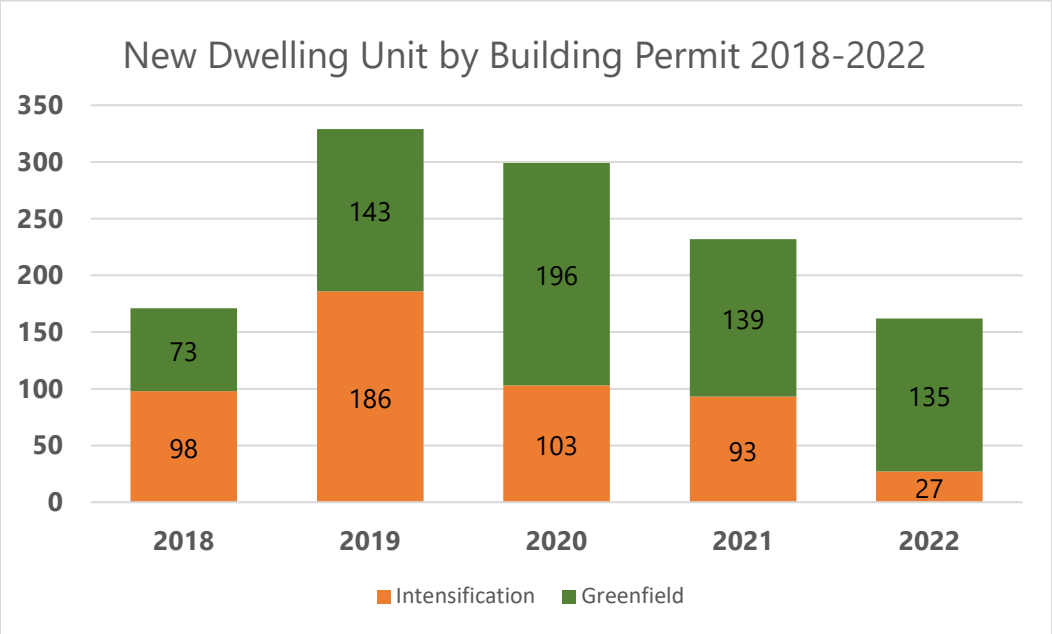
Figure 3: Breakdown New Dwelling Units – Intensification vs. Greenfield



Looking into the future, there are a number of development applications with preliminary approvals for new higher density housing including townhouses, stacked townhouses, and purpose-built apartment buildings within most Urban Areas (Simcoe, Port Dover, Delhi, Waterford) which should result in a continuation of a steady Intensification level rates for the next five-year timeframe as those developments are constructed.

Rural-Hamlet-Resort Areas

Norfolk also has a significant amount of Rural Area which is predominantly designated and zoned Agricultural. Aside from the six designated Urban Areas in the County, there are forty-two Hamlet Areas and six Resort Areas. Each of these areas and designations allows for some form of residential dwellings or seasonal dwellings. Dwellings for seasonal or temporary workers in agricultural and other areas are not included within the reporting for this analysis.

The figure below illustrates the number of new dwelling units over the past 5 years within each area.

Figure 4: Summary of New Dwelling Units in Hamlet, Resort and Rural (Agricultural) Areas, 2018-2022

Year	Hamlet	Resort	Rural (Agricultural)	Total
2018	19	6	51	76
2019	21	15	57	93
2020	18	3	47	68
2021	18	8	75	101
2022	9	5	78	92
Total	**85**	**37**	**308**	**430**

3.0 Residential Land Supply Context

Staff completed a review of existing land supply to identify and estimate future growth potential of lands located within existing settlement boundaries for the six designated urban areas of the County. An analysis was completed to identify Intensification and Greenfield development opportunities. The estimated number of units was based on the existing development approvals or zoning of the subject lands. For intensification potential, site specific opportunities, registered vacant land, draft approved, and in circulation / under review were identified. For greenfield potential: designated future/pending; registered vacant; draft approved; and in circulation / under review, were identified.

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Figure 5: Estimated Number of Dwelling Units for Intensification and Greenfield within Existing Urban Areas

Intensification		Greenfield	
Site Specific Intensification Opportunities	**Units**	**Designated Future/Pending**	**Units**
Delhi	5	Delhi	422
Courtland	-	Courtland	149
Port Dover	29	Port Dover	1851
Port Rowan	28	Port Rowan	842
Simcoe	6	Simcoe	246
Waterford	17	Waterford	240
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
Draft Approved		**Draft Approved**	
Delhi	6	Delhi	59
Courtland	-	Courtland	0
Port Dover	-	Port Dover	732
Port Rowan	-	Port Rowan	128
Simcoe	9	Simcoe	1285
Waterford	30	Waterford	195
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
Intensification Subtotal	**1212**	**Greenfield Subtotal**	**8104**
Grand Total: Estimated Potential Dwelling Units = 9316			

Overall, it is estimated there is potential for at least 1200 dwelling units through Intensification and approximately 8100 dwelling units in Greenfield areas for an estimated total of over 9300 dwelling units within existing Urban Areas.

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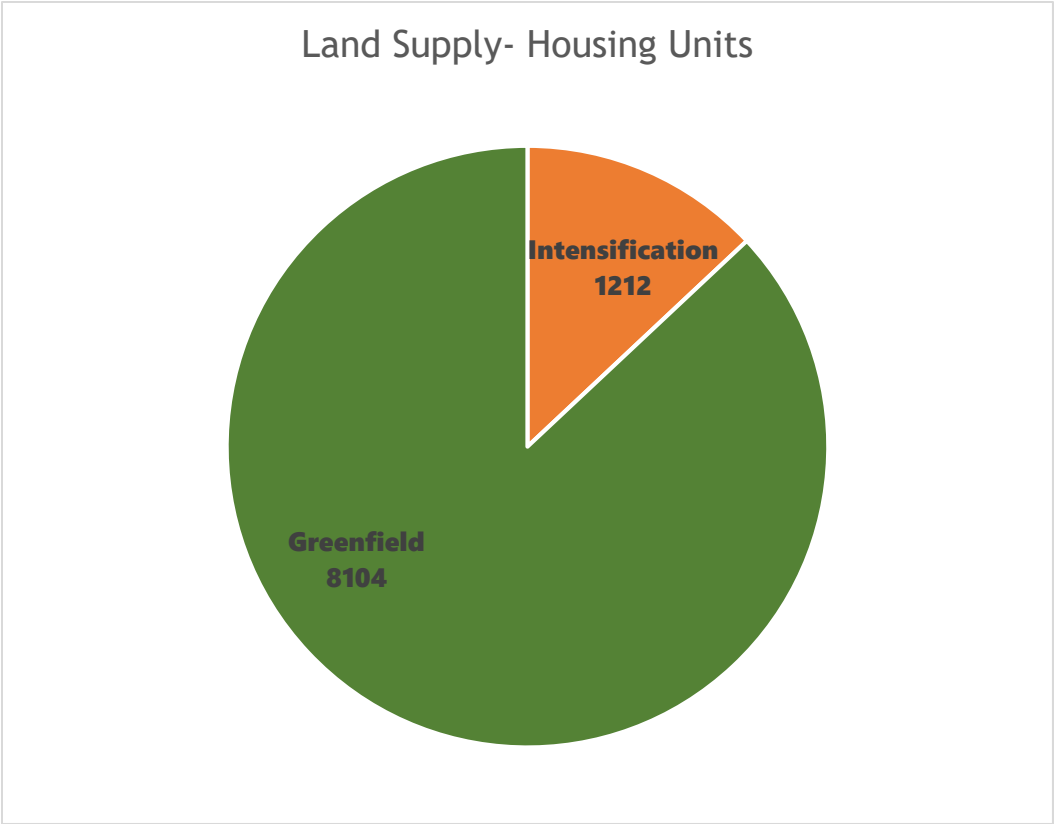
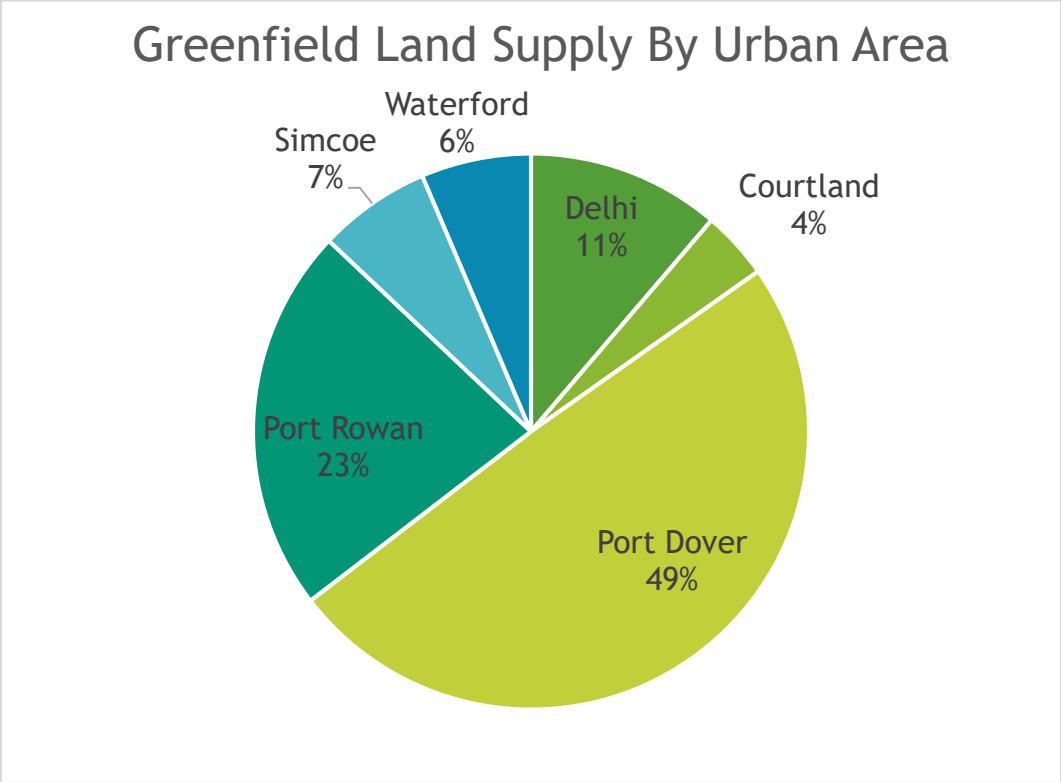
Figure 6: Summary of Estimated Land Supply in Urban Area Settlement Boundaries, Intensification & Greenfield



The mapping of potential land supply for each Urban Area is contained within Appendix B. They are snapshots as of December 31, 2022 and continue to be updated as the status of development applications changes, new applications are submitted or new intensification opportunities are identified. A more dynamic, dashboard of the potential land supply has been created and is intended to be made available in an online format.

When looking at potential Intensification land - Port Dover, Waterford and Simcoe currently have the most development application potential in process or future opportunities. Of note, the recent zoning approval and current site plan development application for a large, new apartment site on the Queensway in Simcoe is technically within the Greenfield area. The potential supply of Greenfield land within current or future development applications is significantly oriented to Port Dover and Port Rowan currently as a ratio to overall opportunities with a smaller amount available in Delhi and low amounts in Simcoe, Waterford, and Courtland (see Figure below). Of note, there are past or current infrastructure capacity limitations for new growth in both Port Dover and Port Rowan although both have underway or planned infrastructure projects.

Figure 7: Summary of Estimated Land Supply by Urban Areas



4.0 Growth Forecasts

4.1 Overview of New Growth Forecasts to 2051

In the initial Norfolk County Comprehensive Review Growth Analysis prepared by Watson, there are three growth projection scenarios identified for Norfolk County, including a Low Scenario, a Medium (Reference) Scenario, and a High Scenario. A range of forecast population was generated from these respective scenarios largely based on varying assumptions regarding annual net migration. It is noted that the long-term population growth scenarios included an upward adjustment of approximately 3.8% to account for the net Census undercount.

The residential population forecasts are illustrated in Figures 8 and 9 and summarized below. The employment forecasts will be further discussed as part of the Employment/Protected Industrial Lands Review update.

Low Population Growth Scenario

Under the Low Scenario, it is assumed that the Norfolk County permanent population base will grow at an average annual rate of 0.7% per year. Under the Low Scenario, Norfolk County's permanent population is forecast to increase moderately between 2016 and 2051 by 18,500, from 66,400 to 84,900, respectively.

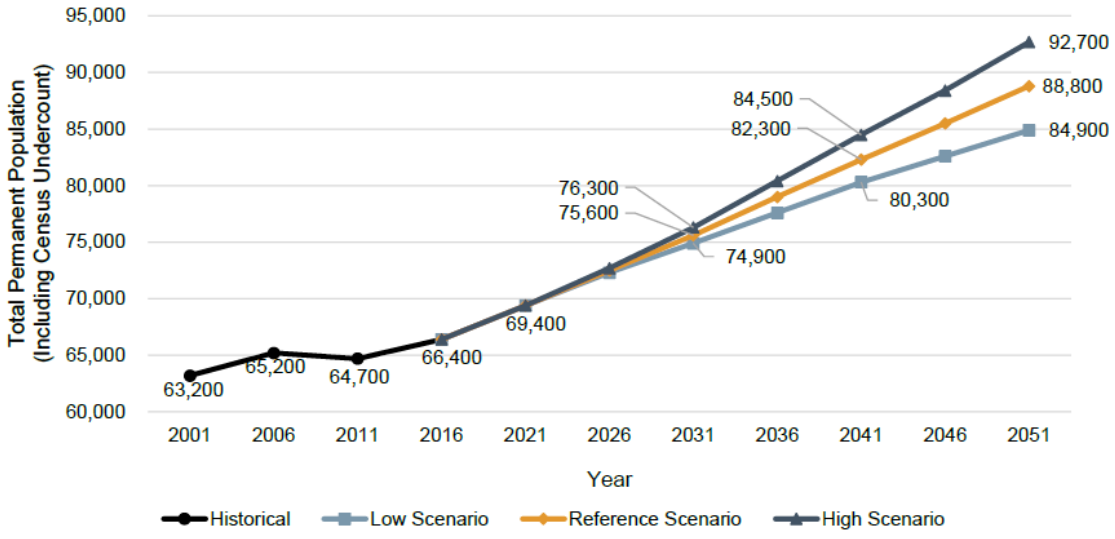
Medium (Reference Scenario) Population Growth Scenario

Norfolk County's permanent population is forecast to grow at an annual rate of approximately 0.8% under the Reference Scenario. 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. The population is expected to reach 88,800 by 2051; this represents an increase of approximately 22,400 from 2016. Under this scenario, the rate of forecast population growth is anticipated to slow marginally in the latter half of the forecast period due to the aging of the County's population base. In comparison to previous 2014 Norfolk County Projections Study, the Reference County-wide Population Growth Scenario is approximately 13,000 people higher by the year 2041.

High Scenario Population Growth Scenario

Under the High Scenario, the County's permanent population is forecasted 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.

Figure 8: Long-term Forecast Permanent Population Scenarios (Watson)



Source: Forecast by Watson & Associates Economists Ltd.
Note: Population includes net Census undercount.

The figure below illustrates the differing population growth scenarios with average annual growth amounts and rates to 2051.

Figure 9: Summary of Growth Analysis (Watson) - Permanent Population Forecast Scenarios

Norfolk County Total Permanent Population Growth					
	2016	2051	2016-2051	Annual Growth	Annual Growth Rate
Low Scenario	66,400	84,900	18,500	530	0.7%
Reference Scenario	66,400	88,800	22,400	640	0.8%
High Scenario	66,400	92,700	26,300	750	1.0%

Source: 2016 derived from Statistics Canada Census data and 2051 by Watson & Associates Economists Ltd.

Each growth scenario described above is based on a range of assumptions related to total net migration, net migration by age and natural increase (i.e., births less deaths). Forecast net migration is largely driven by growth within the local economy and surrounding commuter-shed, as well as the County's attractiveness to empty nesters and seniors. In turn, population growth creates demand for new housing across the County, which is then allocated by urban area, and hamlet and remaining rural area.

The growth forecast model utilized by Watson allows these various growth inputs to be adjusted to evaluate the sensitivity of inputs and the reasonableness of the outputs against historical growth trends and the identified growth drivers.

The permanent population scenarios represent the potential range of future growth which can be anticipated for the County over the next 30 years. Based on the Watson review, the Reference (Medium) Scenario represented a "most likely" growth forecast scenario for Norfolk County when the forecasts were first completed. This considers years when there may be peaks of development activity and other years when there may be lesser development (economic factors, etc.).

The Figure below shows the historical and forecasted households under the Reference (Medium) Scenario, which estimates a total of approximately 8,300 new households from 2021-2051. The average annual number of new households is forecast to be 275 dwelling units (for 2016-2051) as indicated in Figure 2 of Attachment D.

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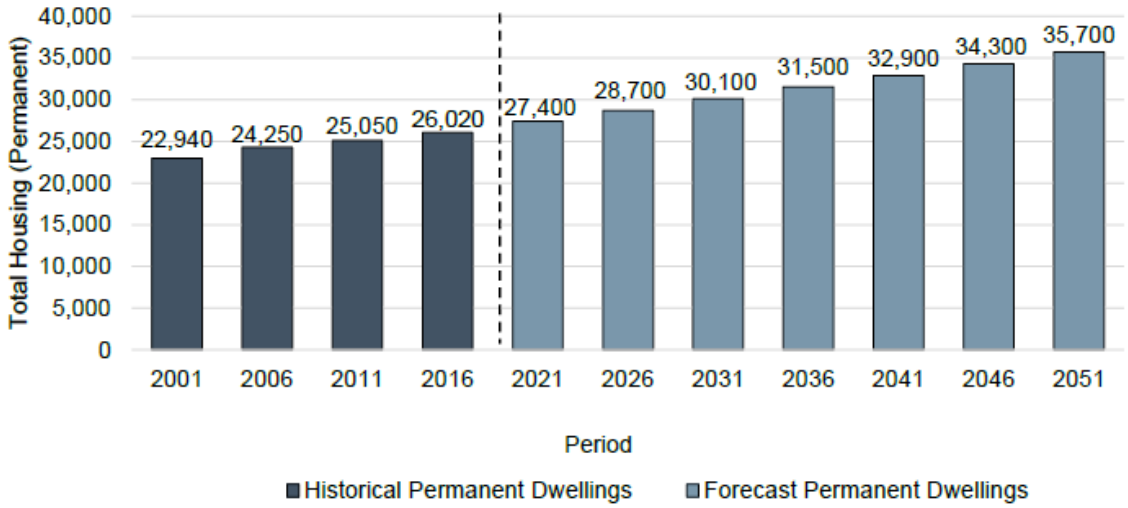
Figure 10: Historical & Forecast Households (Reference Scenario), 2001 to 2051



Note: Figures have been rounded.
Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd.

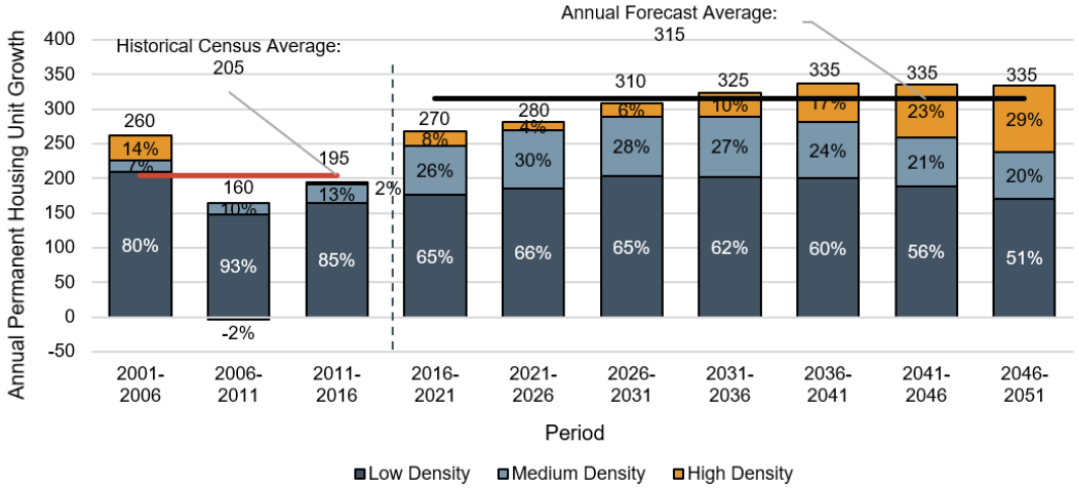
With the benefit of the 2021 Census information and additional analysis of growth patterns, opportunities and influencing factors, further review was conducted on the potential for the High Scenario. Additional rationale and adjustment towards the "High Growth" Scenario as having potential for Norfolk to adopt is outlined in Appendix D.

4.2 Summary of "High" Permanent Population and Housing Forecast to 2051

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 (as per Figure 9 above).

As indicated in Attachment D, under the High Growth scenario, the County would be forecasted to add approximately 9,600 new households from 2021-2051. The average annual number of new households would be about 315 dwelling units (for 2016-2051) as indicated in in the figure below and Attachment D.

Figure 11: 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.

4.3 Forecasted Growth and Existing Residential Lands

Within Norfolk's existing Urban Areas, Watson has estimated that there is sufficient land to develop approximately 9,300 residential dwelling units. Forecasted growth using the High scenario estimates a total growth accommodate needs of approximately 9,600 dwelling units to 2051. While there is a significant amount of land within existing and pending developments the overall County, there are existing or potential infrastructure considerations and differences amongst the forecasts compared to opportunities for specific Urban Areas. Particularly, the two Urban Areas that may have the most deficiency in land supply include: Delhi and Waterford.

4.4 Employment Land Supply

Employment land supply analysis forms part of the overall land supply consideration. A more detailed review of existing and potential industrial / employment land supply is underway and will form part of a future report and Volume update of this comprehensive growth study project.

5.0 Norfolk County Inter-Urban Water Supply (IUWS) Project

Norfolk County has undertaken a significant Inter-Urban Water Supply Project (IUWS), as was referenced in the Volume 1 Context Report, to provide water infrastructure to service existing communities and future growth through an inter-connected system in Norfolk. This would include connections to a lake-based water system through Nanticoke (Haldimand County) in an organized, connected manner to help with the long-term sustainability of the County.

The Grow Norfolk study is considering a range of inputs and growth-related considerations, including existing and planned infrastructure and the new IUWS plan. The initial new growth population and employment forecasts from the Grow Norfolk study Phase 2Ad – Norfolk County Comprehensive Review Growth Analysis (Watson) were utilized as updated inputs to existing and potential water and wastewater capacity analysis and service monitoring.

The endorsed, updated plan for the IUWS system and its phases is a key consideration in the valuation and consideration of any future, appropriate locations for growth and development. Coupled with macro-level existing and planned wastewater capacity, the IUWS is a contributing factor to various growth scenarios as part of this Land Study and Options report.

The updated “High Growth” scenario, including the potential scenarios of distribution and allocation of growth amongst the different communities, requires further review and confirmation with the existing and planned water and wastewater systems (in addition to other engineering and utility infrastructure, community infrastructure and other factors). This will be conducted as a next step in the evaluation and review of the Growth Options and implications.

6.0 Settlement Area Boundary Rationalization

Under the PPS (2020), a planning authority may “identify a settlement area...at the time of a comprehensive review”. Part of the Land Study and Options work for the Grow Norfolk comprehensive review includes an investigation of the appropriateness of existing settlement area boundaries for both Urban and Hamlet Areas.

This extensive exercise considered a variety of factors, such as significant natural heritage (environmental) features and connectivity of the system, environmental buffers, infrastructure and utility areas, existing and potential land use patterns, cultural heritage resources, existing or potential road access, land size and potential compatibility, agricultural conservation and parcel continuity, and other aspects that may impact potential developability or reasons to consider revised settlement area boundary

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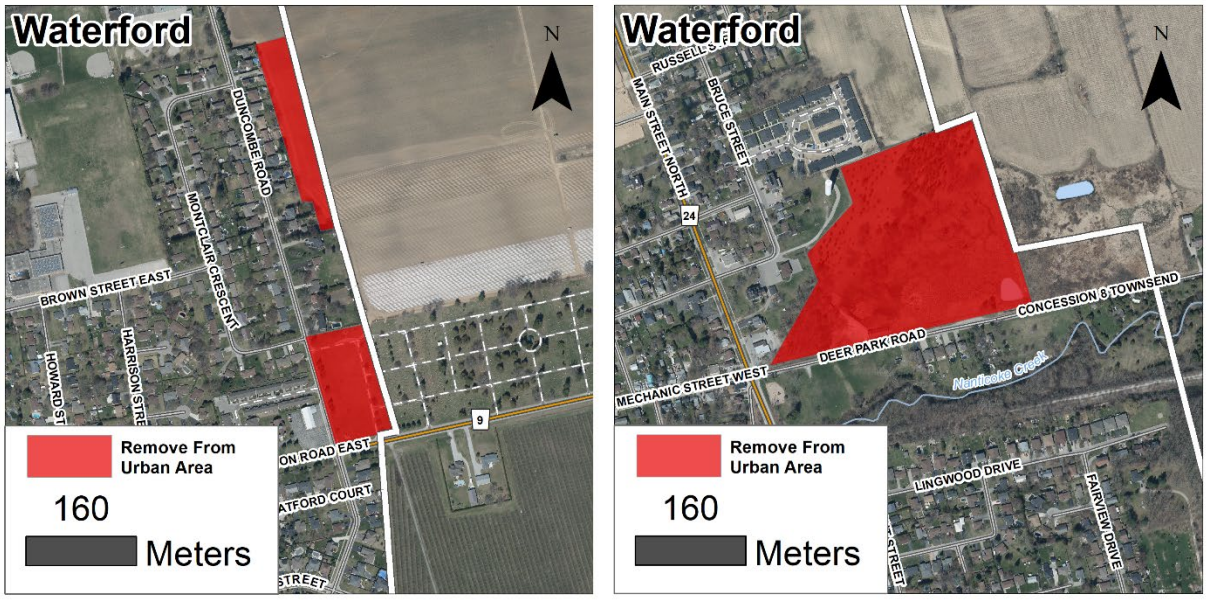
configurations. This is part of a “rationalization” process within the comprehensive review.

The figure below shows an example settlement area boundary rationalization being evaluated.

Figure 12: Example of Potential Boundary Rationalization – Waterford



Following review and analysis of all Urban and Hamlet settlement area boundaries within Norfolk, approximately 290 hectares (~716 acres) of land may be more appropriate to consider either removing from a settlement area for added conservation, contiguity with the agricultural area, or held as future development area. The distribution is roughly 252 hectares existing Urban Area and 38 hectares existing Hamlet Area. This review demonstrates that there are lands within existing settlement boundaries that are not suitable for future development. Re-allocation of some of this existing land area towards more appropriate locations for development as part of a settlement area should be further explored.

The rationalization of settlement area boundaries will continue to be reviewed as part of the next steps and recommendations will be made for the Phase 4: Preferred Directions Report and Official Plan Amendment as appropriate. Work completed to-date on this component remains in draft form.

7.0 Settlement Area Boundary Expansion & Protected Industrial Conversion Requests

In accordance with the PPS (2020), a planning authority may identify a settlement area or allow the expansion of a settlement area boundary only at the time of a comprehensive review and only where specific criteria has been demonstrated. Norfolk is undertaking a comprehensive review as per the criteria of the PPS and the Official Plan. Throughout "the time of" the comprehensive review and related engagement process for the Grow Norfolk Study, a number of submissions have been received from landowners and proponents for consideration as part of the review regarding either settlement area boundaries or protected industrial land conversions (to residential).

Settlement Area Boundaries

Boundary expansions have been requested in various locations for the following urban areas within Norfolk County: Courtland, Delhi, Waterford, Port Dover, and Simcoe. Additionally, many expansion requests have been received for various hamlets. The key distinction would be that the hamlets would be for lower density residential purposes and not on serviced lots.

The figure below provides a summary of requests that are specific to lands for settlement area boundary expansions and Appendix A provides the full list of requests.

Figure 13 Summary of Settlement Area Expansion Requests[1]

Settlement Area	Number of Parcels	Hectares	Acres
Andy's Corners	1	31	77
Bloomsburg	2	32	79
Courtland	1	61	151
Cultus	1	1	2.5
Delhi	7	169	418
Hillcrest	1	8	20
La Salette	1	1	2.5
Norfolk North	1	14	35
Norfolk West	1	2	5
Port Dover	7	254	628
Port Ryerse	1	5	12
Simcoe	9	141	348
St. Williams	1	16	40
Villa Nova	1	5	12
Vittoria	1	4	10

[1] General inquiries and less detailed requests were not included in this summary as it was not possible to confirm the specific area or proposed use as residential. Any other requests received after the drafting of this report continue to be documented.

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Walsh	1	2	5
Waterford	5	125	309
TOTAL:	**42**	**870**	**2154**

Many of the formal request submissions include supporting documentation with background information, infrastructure, and planning considerations. There are a number of additional general inquires or general requests regarding settlement area boundaries. It is expected that during the Growth Study process and potentially at the formal Official Plan Amendment stage that further or changed requests may occur.

Protected Industrial Conversions

The figure below summarizes the extent of requests regarding review of Protected Industrial areas in Courtland, Delhi, Simcoe, and Waterford. For the most part, the requests involve the potential for conversion for residential or mixed-use purposes and as such are included within this component of the Land Study and Options. However, these will be further reviewed in the context of the Employment/Protected Industrial Lands Review which is underway.

Figure 14 Summary of Protected Industrial Conversion Requests

Settlement Area	Number of Parcels	Hectares	Acres
Courtland	1	11	27
Delhi	2	4	10
Simcoe	1	7	17
Waterford	3	5	12
TOTAL:	**7**	**27**	**66**

8.0 Growth Allocation Options

The Watson Technical Memo in Attachment D identifies a summary of four population, housing, and employment growth allocation options for the County. The Growth Options are based on the Reference and High Growth Scenarios. Each option includes a varying set of assumptions in relation to growth allocation, mixture of housing types, and differing intensification targets. Details of each of the growth allocation options are explored in Section 3 of the Technical Memo. The Growth Options are summarized in the figure below, which is an expert from the Technical Memo in Attachment D.

Figure 15 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%

The Figure below is from the Watson Memo and summarizes the potential land needs by urban settlement area for each option. Although their analysis indicates that overall, there is sufficient land for the overall projections, within some of the identified urban areas, there is not sufficient land for projected growth. The two urban areas that have a residential land deficit are Delhi and Waterford.

Figure 16 Land Needs 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	678	3,928	999	1,923	697	8,390
Option 1	2023-2048 Forecast*	36	531	1,459	399	1,219	888	4,532
	Housing Unit Shortfall/ Surplus	129	147	2,469	600	704	(191)	3,858
	Residential Land Surplus/ Need (Gross ha)	12	14	229	56	65	(18)	358
Option 2	2021-2048 Forecast*	114	891	1,237	359	1,826	876	5,303
	Housing Unit Shortfall/ Surplus	51	(213)	2,691	640	97	(179)	3,087
	Residential Land Surplus/ Need (Gross ha)	5	(20)	250	59	9	(17)	287
Option 2B	2021-2048 Forecast*	100	1,466	681	285	1,903	886	5,321
	Housing Unit Shortfall/ Surplus	65	(788)	3,247	714	20	(189)	3,069
	Residential Land Surplus/ Need (Gross ha)	6	(73)	302	66	2	(18)	285
Option 3	2021-2048 Forecast*	100	782	972	335	1,629	723	4,541
	Housing Unit Shortfall/ Surplus	65	(104)	2,956	664	294	(26)	3,849
	Residential Land Surplus/ Need (Gross ha)	6	(10)	274	62	27	(2)	357

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.

9.0 Growth Options & Implications

An evaluation will need to be undertaken of the Growth Options and the potential benefits and implications thereof. Some key items to consider, include:

- Further exploration and analysis of possible realignment of urban boundaries or adjustments to allow for projected growth in the two areas identified in a deficit land situation – Delhi and Waterford.
- Further review and adjust areas where future development will be impacted by issues such as known servicing constraints or longer-term planned, servicing solutions to enable development in areas with existing servicing capacity in the shorter term.
- Focusing growth on serviced, urban settlement areas and particularly aligned with the various phases of the IUWS project is a key consideration of the Growth Options and implications.
- Based on the residential growth forecasts, potential prioritization of growth to serviced-urban areas and the existing available land within those urban settlement areas, further expansions to add more land to hamlets and non-serviced areas may not be immediately necessary
- The pending results of the Land Evaluation Area Review (LEAR) will provide further context regarding the location of any settlement area boundary considerations.
- The range of potential development growth options for different settlement areas requires further analysis of the water and wastewater system (existing and planned capacities) along with other hard infrastructure and utility systems.
- The existing and potential implications for community infrastructure – parks, schools and institutional uses, recreation, libraries, emergency services, etc. - will need to be evaluated for the Growth Options and specific settlement areas.
- The natural heritage system, water resources, natural resources and transportation system would be utilized as key factors in review of the Growth Options.

The overall evaluation and preferred direction would consider the Growth Management principles identified in earlier phases of the project along with various social, physical, environmental, and economic factors, as well as provincial and local policy direction. Stakeholder engagement would be conducted as part of the review and input to the Growth Options and Preferred Direction Report.

10.0 Next Steps

The following are a summary of key next steps towards final recommendations for the Grow Norfolk comprehensive review project:

1. Completion of the Land Evaluation Area Review to identify prime agricultural areas, possible specialty crop areas that may require further protections, areas that may be considered “Rural Lands” or appropriate areas as it relates to implications for settlement area boundaries.
2. Production of the Employment/Protected Industrial Lands Review component.
3. Engagement with stakeholders on the DRAFT Land Study and Options Report, including presentation to the Planning Advisory Committee.
4. Evaluation and review of the Growth Options and implications. This includes further review of existing and planned water and wastewater capacity, systems and other engineering and utility infrastructure, community infrastructure and other factors.
5. Use of the “High Growth” scenario for remainder of the project.
6. Confirm areas, if any, that can be adjusted (“rationalized”) from settlement boundaries based on development constraints, natural heritage conservation or other purposes.
7. Identify preferred directions – including prioritized areas for future growth (Intensification, Greenfield, Employment Lands, Urban and Rural/Hamlet Settlement Areas) and policy recommendations.
8. Present analysis and recommendations in Phase 4 Preferred Directions Report.
9. Undertake County-initiated Official Plan Amendment in accordance with the Provincial Policy Statement in effect at the time.

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Appendix A: Land Study Assumptions

For the purposes of this process, the following definitions assumptions were used:

Land Supply

Defined as lands which can be developed for employment (industrial/commercial) or residential uses. These lands were evaluated for Urban and Hamlet areas only. Employment lands were differentiated from residential lands by the existing zoning and official plan designations on the land.

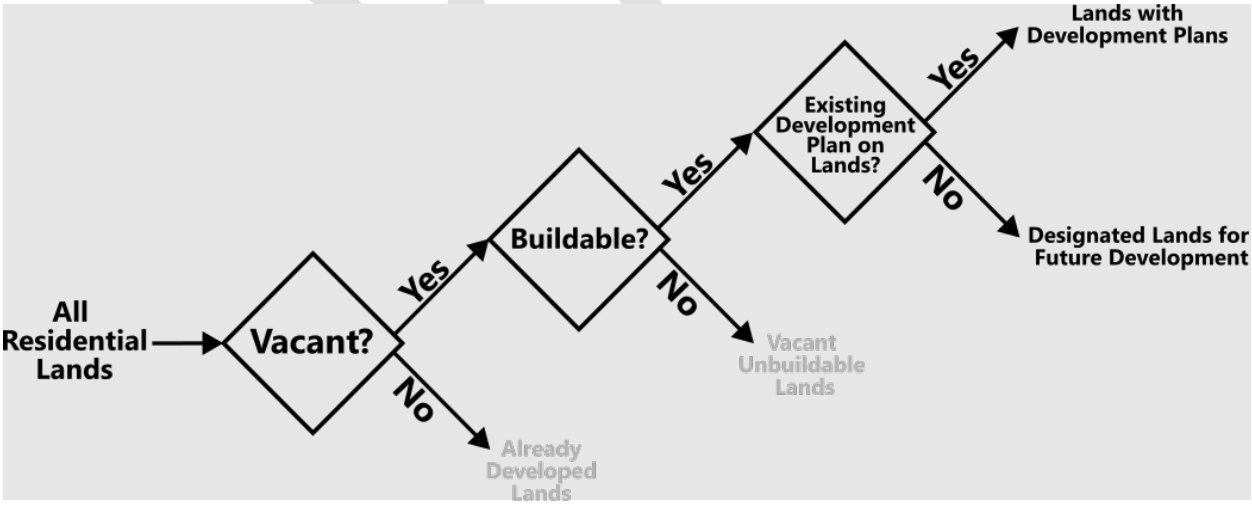
Residential Land Supply

Residential land supply is defined as vacant buildable land which is zoned and designated appropriately for development. Evaluating residential land supply can help identify the potential additional population which can be added to an area. There are two main types of vacant residential lands:

Lands with Development Plans Present

Designated Lands for Future Development

Both types of available land represent only those lands which are vacant and buildable.



Lands with Development Plans

These are residential lands which currently have a site plan, subdivision plan or condominium plan of six or more units located on the area. The number of potential dwellings for these lands is determined by the development application.

Designated Lands for Future Development

Designated lands for future development are all vacant buildable lands which do not currently have a development plan located on them. For lands with an Urban Residential land use designation in the Official Plan:

- Larger parcels of land were given a lot potential of fifteen units per hectare of land in urban areas.
- In hamlets, larger areas were divided as one unit per 0.4 hectare.
- Previously registered vacant lots were assigned one potential unit if they met the criteria of being buildable.

Dwelling Density

For lands with an active planning application, the number of dwellings is based on the dwelling count provided by the applicant. Otherwise, buildable land is assessed using the following criteria:

Hamlet Lands = 1 unit per 0.4 hectare

Urban Lands = 15 units per hectare

Additionally, there were several vacant lots that were created as part of an existing registered plan of subdivision. These lots were assigned a unit each if they met the criteria of being buildable.

Vacant Lands

Vacant parcels were defined as those without a dwelling, building, or parking lot on the lands. A database of vacant lands was developed by starting with the assessed parcels which MPAC (Municipal Property Assessment Corporation) defines as “Vacant”. MPAC denotes vacant properties with a “100 series” property code. From this initial list of vacant properties further refinements were made by using building permits and aerial photography to confirm MPAC’s listed property codes. The following checks were made to confirm a value of vacant to these properties:

Building Permit Checks

Are there any building permits on these vacant lands which could have altered their status to non-vacant?

Are there demolition permits present on non-vacant lands which may have altered the properties status to now be vacant?

Aerial Photography Checks

Are there any minor structures (e.g., garages) or paved parking areas which would impede the development of a vacant property?

Are there any properties which appear devoid of structures which MPAC has assessed as being vacant?

Are there any structures present on a property which MPAC has defined as vacant?

In instances where aerial photography showed the lands as vacant but there was a recent building permit, the building permit data was given precedent. These additional refinements helped clear up any errors of commission and omission that are present in MPACs (Municipal Property Assessment Corporation) property data.

Buildable vs Non-buildable

Only lands which were identified as “buildable” were factored into the land supply. Many criteria had to be met for a parcel of land to be defined as buildable. These factors are:

- Meets the required minimum area
- Meets the required frontage on a publicly maintained road
- Has the appropriate zoning and official plan designation
- Parcel of land is not joined as one PIN to an additional parcel(s) of land
- Contains a building envelope that meets the zone provisions

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Appendix B: Estimated Development Potential for Each Urban Area (Mapping)

Courtland

Delhi

Port Dover

Port Rowan

Simcoe

Waterford

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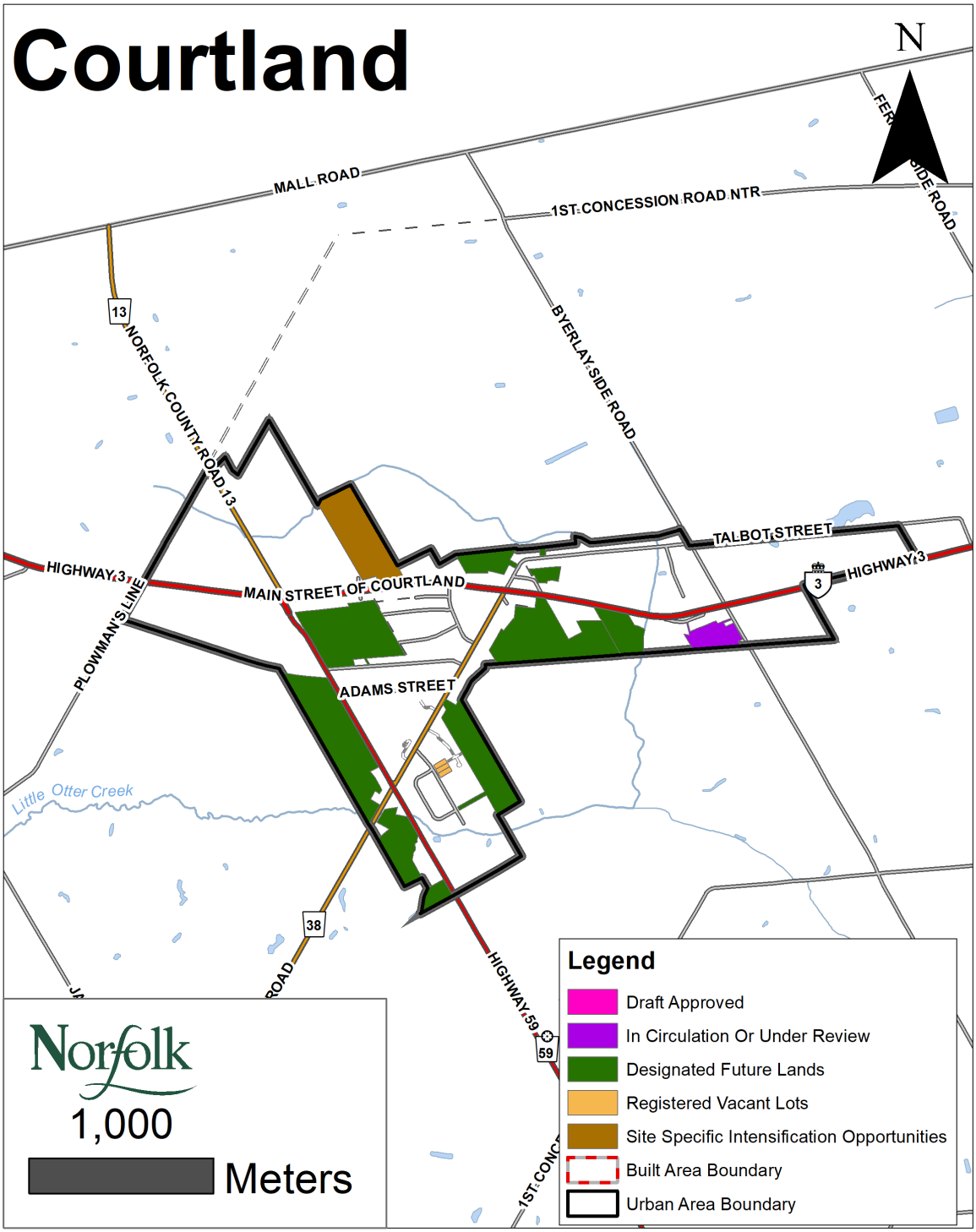
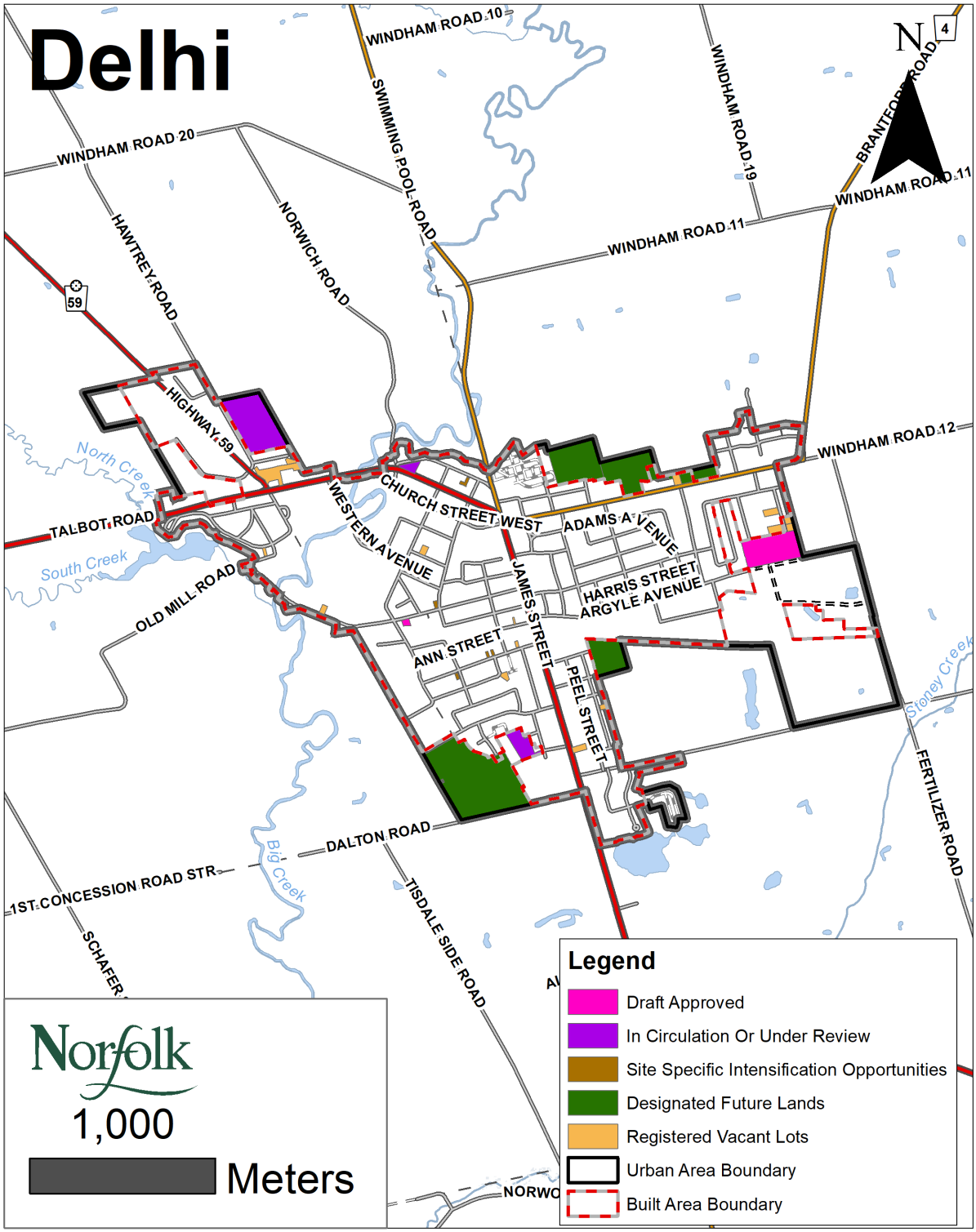
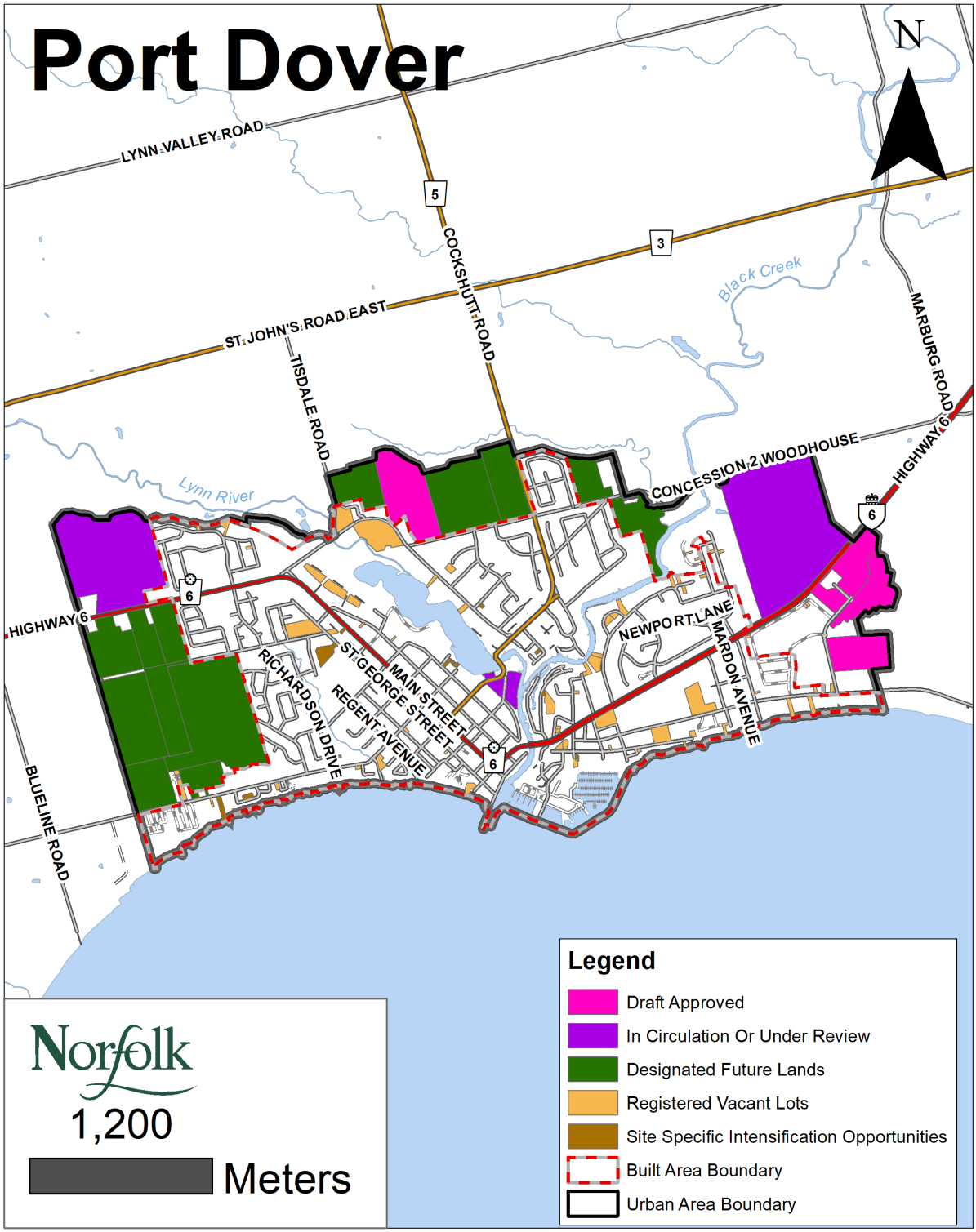
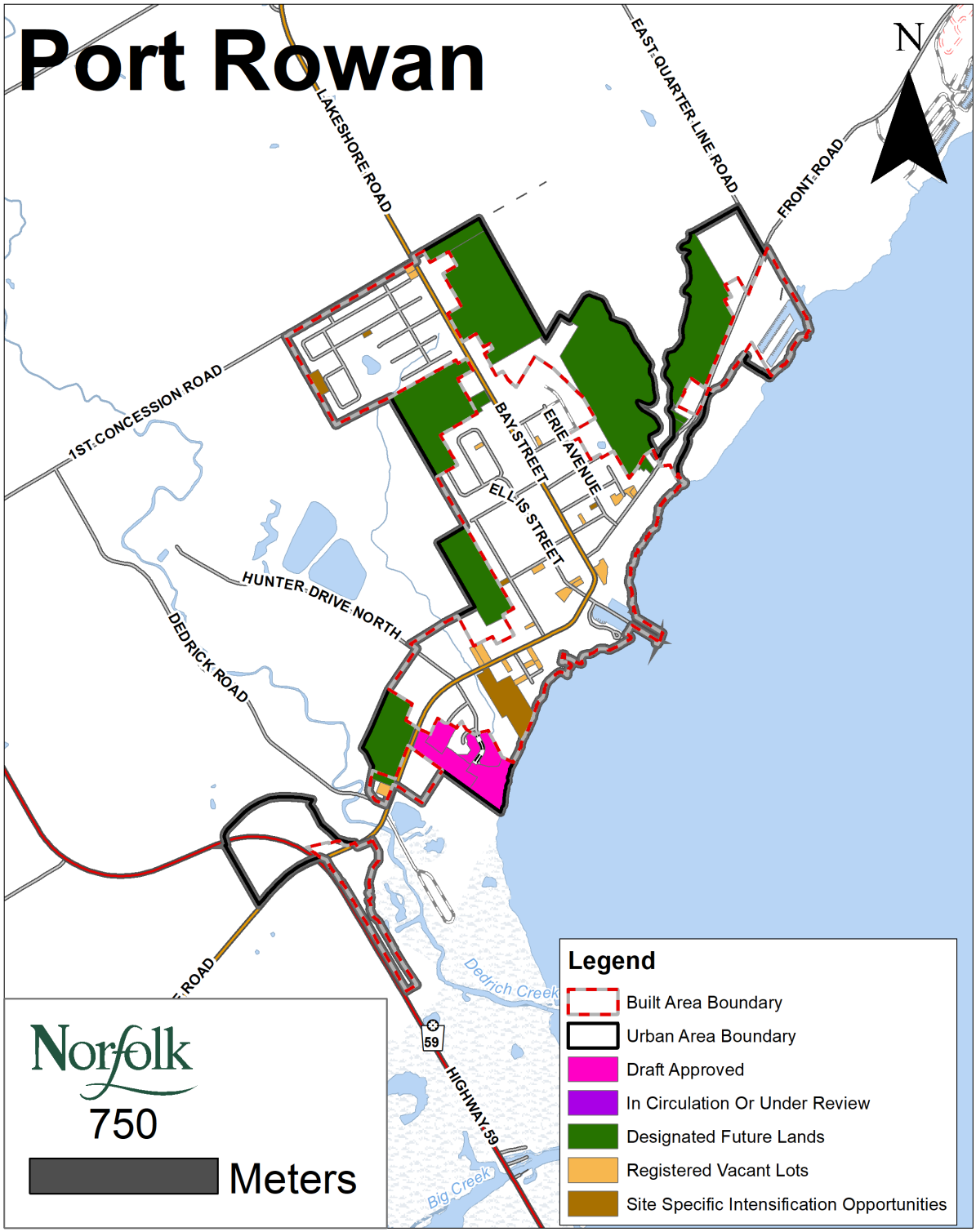
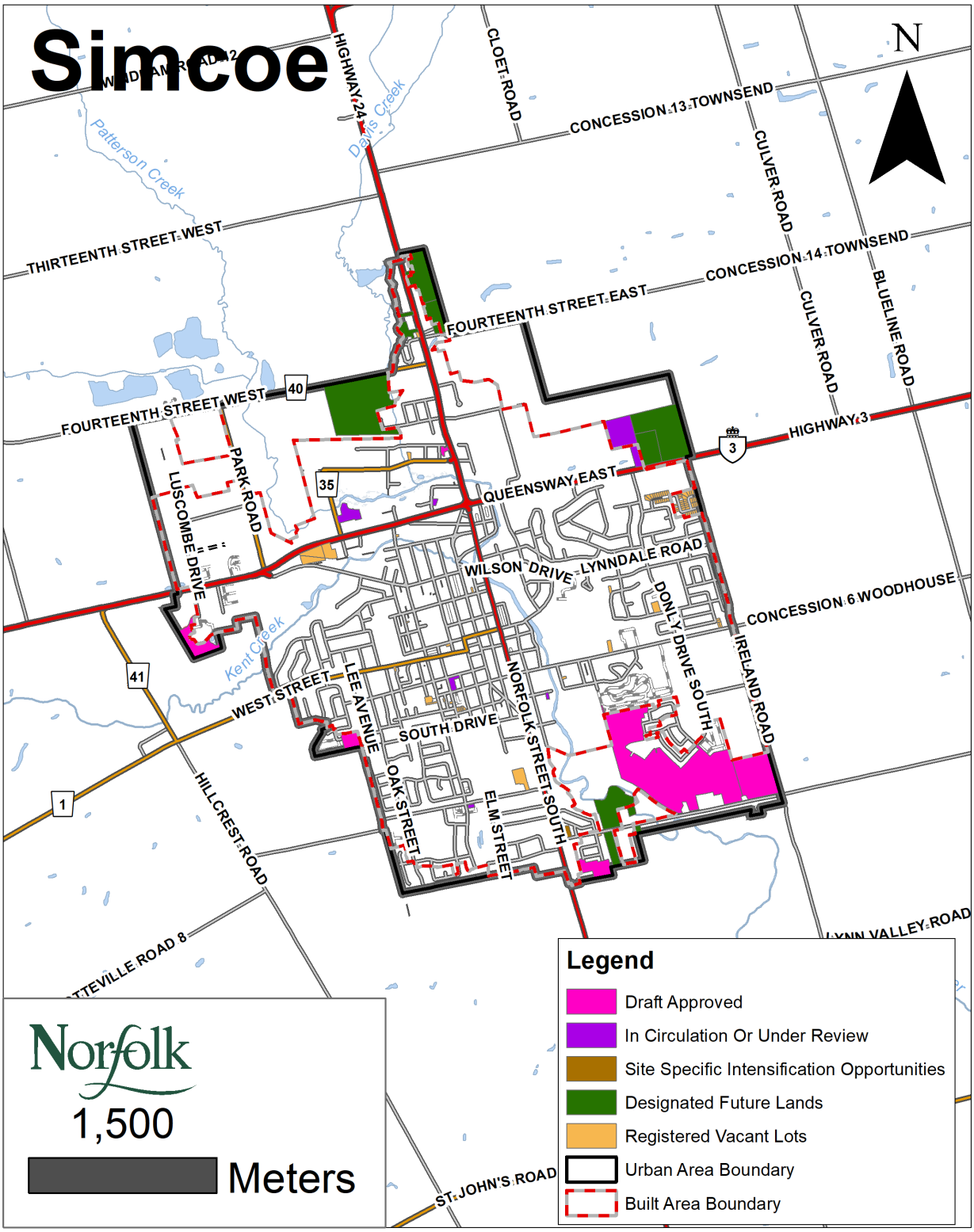
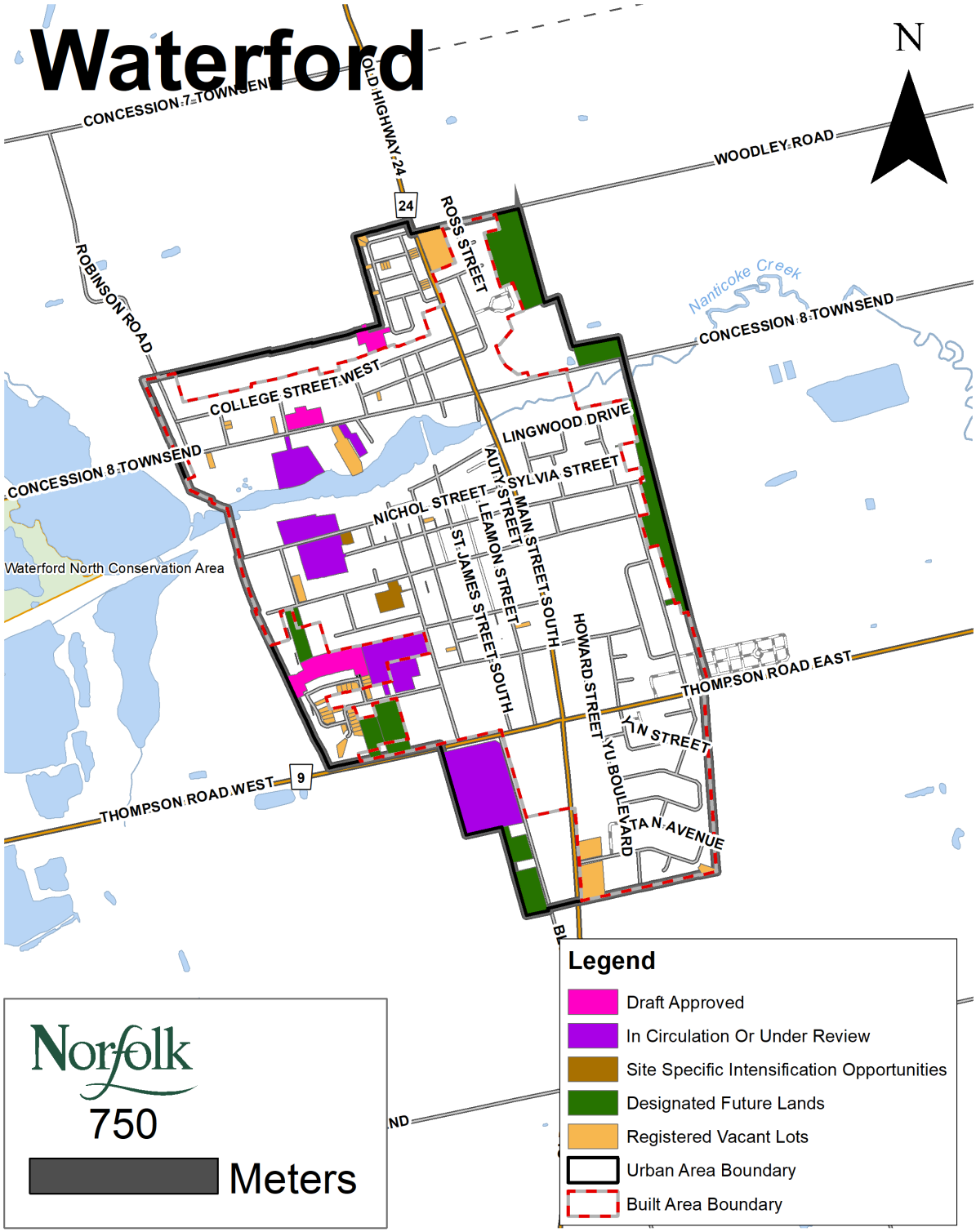

Courtland
N
MALL ROAD
1ST CONCESSION ROAD NTR
BYERLAY SIDE ROAD
NORFOLK COUNTY ROAD 13
13
TALBOT STREET
HIGHWAY 3
MAIN STREET OF COURTLAND
3
PLOWMAN'S LINE
ADAMS STREET
Little Otter Creek
38
HIGHWAY 59
59
Legend
Draft Approved
In Circulation Or Under Review
Designated Future Lands
Registered Vacant Lots
Site Specific Intensification Opportunities
Built Area Boundary
Urban Area Boundary
Norfolk
1,000
Meters


Delhi
N
WINDHAM ROAD 10
WINDHAM ROAD 20
SWIMMING POOL ROAD
WINDHAM ROAD 19
BRANTFORD ROAD
WINDHAM ROAD 11
WINDHAM ROAD 11
HAWTREY ROAD
NORWICH ROAD
59
HIGHWAY 59
North Creek
WINDHAM ROAD 12
TALBOT ROAD
CHURCH STREET WEST
ADAMS AVENUE
WESTERN AVENUE
South Creek
OLD MILL ROAD
JAMES STREET
HARRIS STREET
ARGYLE AVENUE
ANN STREET
PEEL STREET
Stoney Creek
FERTILIZER ROAD
DALTON ROAD
Big Creek
1ST CONCESSION ROAD STR
TISDALE SIDE ROAD
SCHAFER
NORWO
Legend
Draft Approved
In Circulation Or Under Review
Site Specific Intensification Opportunities
Designated Future Lands
Registered Vacant Lots
Urban Area Boundary
Built Area Boundary
Norfolk
1,000
Meters


Port Dover
N
LYNN VALLEY ROAD
5
COCKSHUTT ROAD
3
ST. JOHN'S ROAD EAST
TISDALE ROAD
Black Creek
MARBURG ROAD
CONCESSION 2 WOODHOUSE
HIGHWAY 6
Lynn River
6
HIGHWAY 6
NEWPORT LANE
MARDON AVENUE
RICHARDSON DRIVE
ST. GEORGE STREET
MAIN STREET
REGENT AVENUE
BLUELINE ROAD
Legend
Draft Approved
In Circulation Or Under Review
Designated Future Lands
Registered Vacant Lots
Site Specific Intensification Opportunities
Built Area Boundary
Urban Area Boundary
Norfolk
1,200
Meters


Port Rowan
N
LAKESHORE ROAD
EAST QUARTER LINE ROAD
FRONT ROAD
1ST CONCESSION ROAD
BAY STREET
ERIE AVENUE
ELLIS STREET
HUNTER DRIVE NORTH
DEDRICK ROAD
Dedrich Creek
Big Creek
59
HIGHWAY 59
Legend
Built Area Boundary
Urban Area Boundary
Draft Approved
In Circulation Or Under Review
Designated Future Lands
Registered Vacant Lots
Site Specific Intensification Opportunities
Norfolk
750
Meters


Simcoe
N
HIGHWAY 24
CLOET ROAD
CONCESSION 13 TOWNSEND
CULVER ROAD
BLUELINE ROAD
Patterson Creek
Davis Creek
THIRTEENTH STREET WEST
CONCESSION 14 TOWNSEND
FOURTEENTH STREET EAST
FOURTEENTH STREET WEST
40
HIGHWAY 3
3
PARK ROAD
LUSCOMBE DRIVE
35
QUEENSWAY EAST
WILSON DRIVE
LYNNDALE ROAD
DONLY DRIVE SOUTH
CONCESSION 6 WOODHOUSE
IRELAND ROAD
Kent Creek
41
WEST STREET
LEE AVENUE
SOUTH DRIVE
NORFOLK STREET SOUTH
OAK STREET
ELM STREET
1
HILLCREST ROAD
LYNN VALLEY ROAD
ST. JOHN'S ROAD
Legend
Draft Approved
In Circulation Or Under Review
Site Specific Intensification Opportunities
Designated Future Lands
Registered Vacant Lots
Urban Area Boundary
Built Area Boundary
Norfolk
1,500
Meters


Waterford
N
CONCESSION 7 TOWNSEND
OLD HIGHWAY 24
24
WOODLEY ROAD
ROSS STREET
ROBINSON ROAD
Nanticoke Creek
CONCESSION 8 TOWNSEND
COLLEGE STREET WEST
LINGWOOD DRIVE
SYLVIA STREET
AUTY STREET
MAIN STREET SOUTH
NICHOL STREET
LEAMON STREET
ST JAMES STREET SOUTH
HOWARD STREET
YU BOULEVARD
YIN STREET
TATAN AVENUE
THOMPSON ROAD EAST
THOMPSON ROAD WEST
9
Waterford North Conservation Area
Legend
Draft Approved
In Circulation Or Under Review
Site Specific Intensification Opportunities
Designated Future Lands
Registered Vacant Lots
Urban Area Boundary
Built Area Boundary
Norfolk
750
Meters

Appendix C: List of Settlement Area Boundary Expansion Requests

Settlement Area	Hectares	Owner	Consultant
Simcoe	3.60	Landhill Management Inc	Mary Elder
Simcoe	8.90	Westwood Trail Developments Inc	IBI
Delhi	23.51	804575 Ontario Inc	GSP Group
Delhi	31.81	804575 Ontario Inc	GSP Group
Waterford	0.37	Brenda Bradshaw	Mary Elder
Bloomsburg	12.76	2836505 Ontario Inc (Dr Alexandre Kostirko)	Mary Elder
Waterford	30.53	Mark VanGoethem	Mary Elder
Cultus	0.91	Jamie Visser and Stephanie Harrison	Mary Elder
Waterford	12.12	Round Plains Ginseng Farms Inc - Steve Carroll	Landpro
Waterford	50.28	Round Plains Ginseng Farms Inc - Steve Carroll	Landpro
Simcoe	27.65	El-Ahmed Orchards Ltd - Tareq El-Ahmed	N/A
Norfolk West	1.82	Brian VanQuaethem	Kevin Bain
Andy's Corners	30.60	James and Jessica Fitzpatrick	Bill Bowe
Simcoe	32.02	Mark and Kristen Ghesquiere	G. Douglas Vallee Ltd
Simcoe	9.84	466353 Ontario Inc	G. Douglas Vallee Ltd
Delhi	17.14	The Plantation Ltd	Mary Elder
Simcoe	32.70	Schuyler Farms Limited	Bowtye Resources Inc Land Development Research Consultants
Simcoe	20.00	Schuyler Farms Limited	Bowtye Resources Inc Land Development Research Consultants
Waterford	31.60	Schuyler Farms Limited	Bowtye Resources Inc Land Development Research Consultants
Simcoe	1.05	Prominent Homes Inc	G. Douglas Vallee Ltd
Hillcrest	7.63	789303 Ontario Inc / David & Mary McElhone	G. Douglas Vallee Ltd
Villa Nova	4.52	Terrilyn Moore	G. Douglas Vallee Ltd
Courtland	60.50	Michael and Sandra Kloepfer	Landpro
Delhi	23.97	Reed Verhoeve Farms Inc	Mary Elder
Delhi	21.75	Reed Verhoeve Farms Inc	Mary Elder

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La Salette	1.25	Susan Descheemaeker	Jeff Descheemaeker
Port Dover	26.16	1278424 Ontario Inc	LandPro
Port Dover	44.21	1278424 Ontario Inc	LandPro
Port Dover	81.13	1278424 Ontario Inc	LandPro
Port Dover	17.62	Howard Goode	MHBC
Port Ryerse	4.60	Adolf Pottek	Mary Elder
Delhi	0.14	2834103 Ontario Inc	Jody Gee
Simcoe	5.11	Kichler Farms Ltd.	Driftwood
Port Dover	30.86	Darrin Smith	N/A
Vittoria	3.89	James Chadwick	Bill Culver
Delhi	51.09	Arvane Farms	Bill Culver
Port Dover	27.09	Robko Farms	Bill Culver
Port Dover	27.04	Robko Farms	Bill Culver
St. Williams	16.34	Arvane Farms	Bill Culver
Norfolk North	14.27	Robko Farms	Bill Culver
Walsh	1.77	C & R Atkinson Farms Ltd.	N/A
Bloomsburg	19.31	Stephen Yaworski	MHBC
Total	**869.50 Hectares (2148.59 Acres)**		

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Appendix D: -
Norfolk County Comprehensive Review – Draft Growth Scenarios and Land Needs (Watson & Associates Economists Ltd.)

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Technical Memorandum

Watson & Associates ECONOMISTS LTD.

To	Tricia Givens, Director, Planning; and Brandon Sloan, General Manager, Administration, Community Development Division, Norfolk County
From	Jamie Cook, Managing Partner; Vlad Petrov, Senior Consultant; and Shaila Taku, Consultant
Date	May 1, 2023
Re:	Norfolk County Comprehensive Review – Draft Growth Scenarios and Land Needs

Fax ☐ Courier ☐ Mail ☐ Email ☒

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 influence the location of housing demand within the County.

1. Background

1.1 Terms of Reference

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.[1] 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

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

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.

1.2 Provincial Planning Policy Context

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 P.P.S. 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.

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. Another key change in the proposed P.P.S., 2023 is that planning authorities are allowed to extend beyond this time frame for infrastructure, Employment Areas and Strategic Growth Areas. 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-

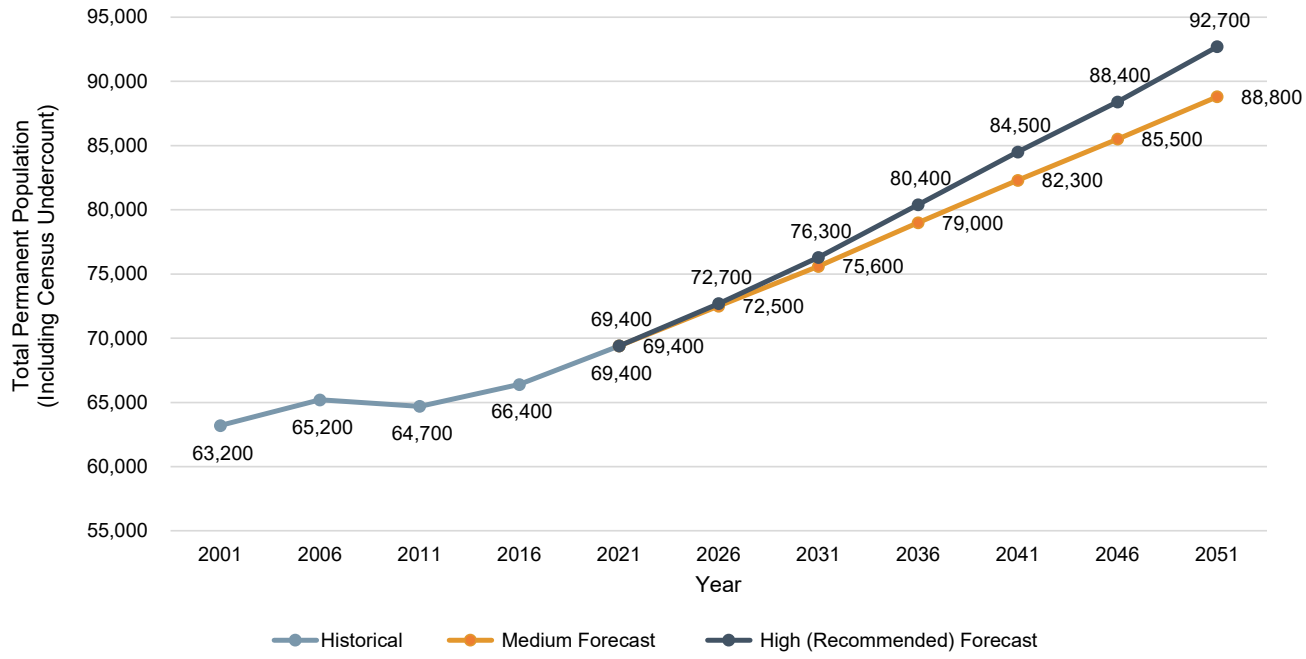
supportive employment), would potentially undermine the proposed P.P.S., 2023 policies related to complete and competitive communities.

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.

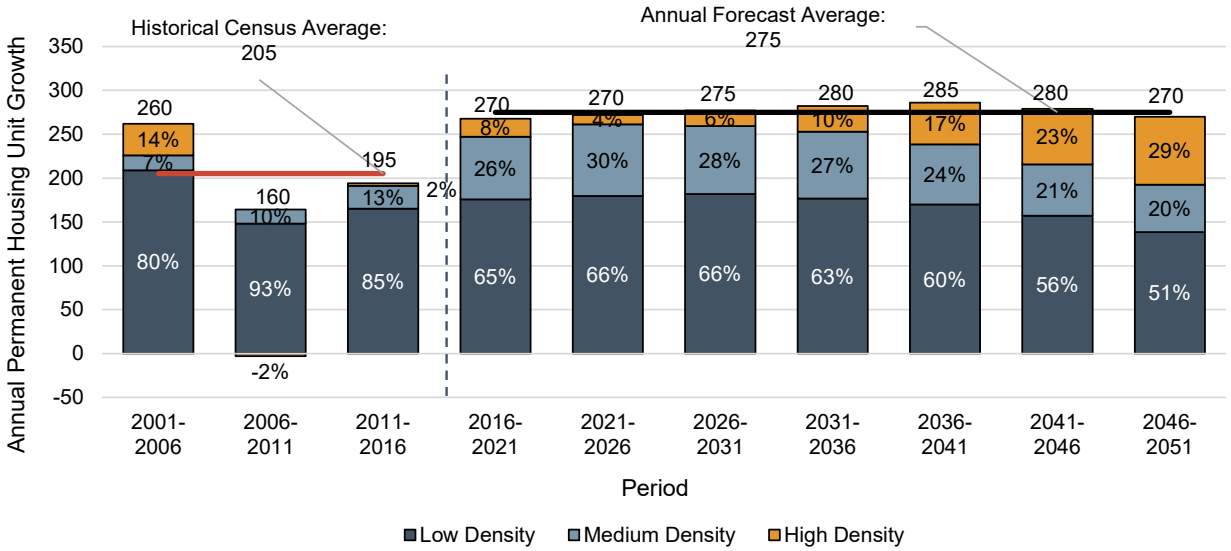
Figure 1
Norfolk County
Long-Term Population Forecast Scenarios, 2021 to 2051



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

Figures 2 and 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.

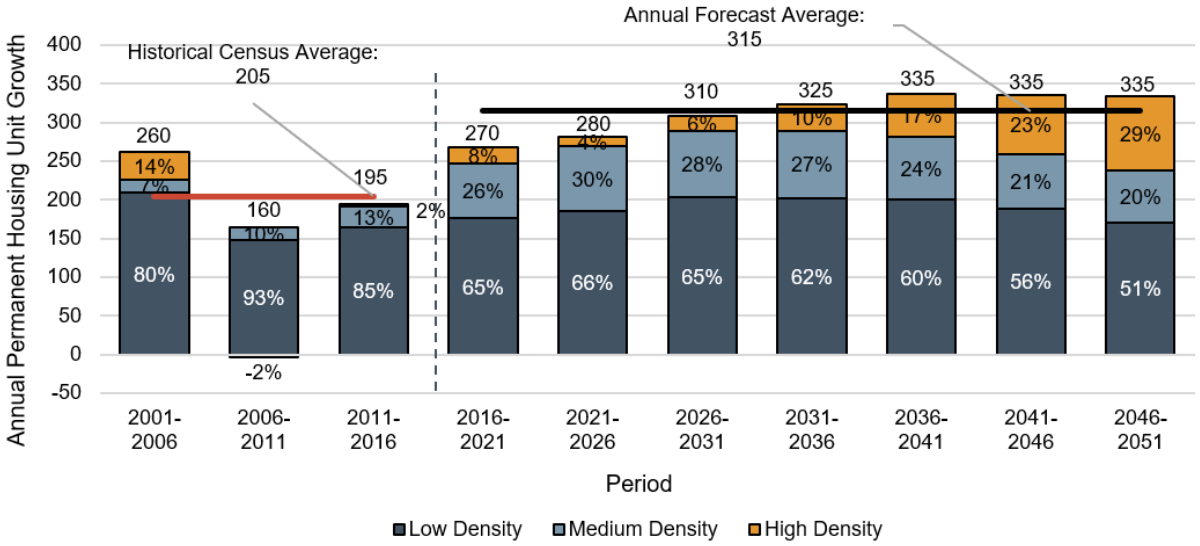
Figure 2
Norfolk County
Five-Year Incremental Housing Growth – Historical and Forecast (Medium Growth Scenario), 2001 to 2051



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.

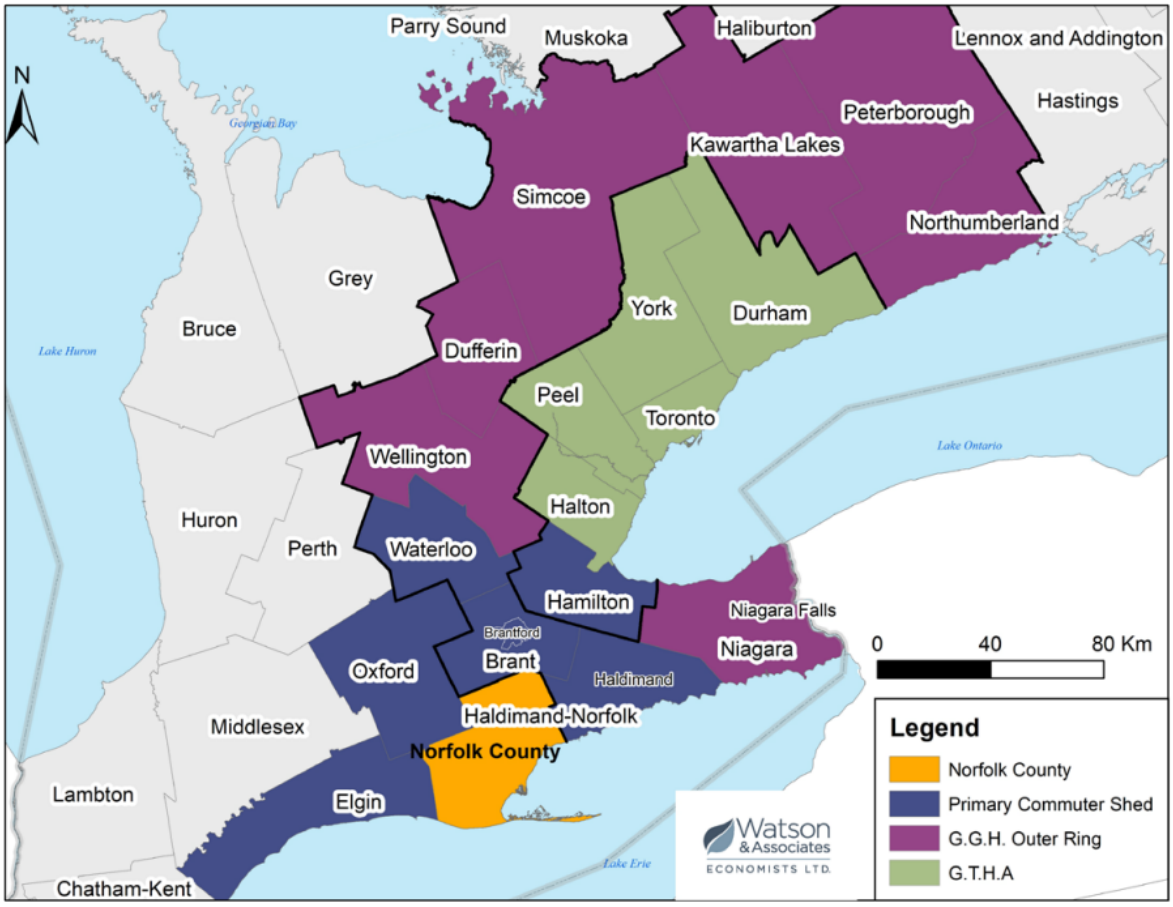
The following section provides an overview of the long-term growth forecast for Norfolk County within the context of the broader region/commuter-shed.

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.

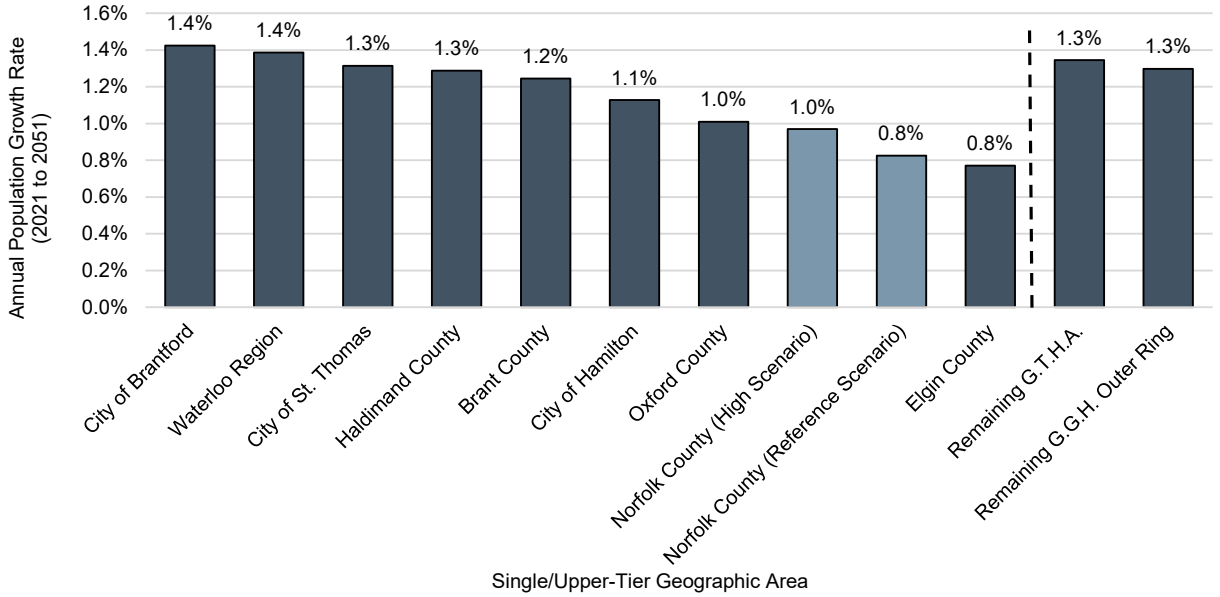
Figure 4
Norfolk County
Primary Commuter-Shed and Surrounding Area



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.

Figure 5
Norfolk County
Annual Permanent Population Forecast Growth Rate Comparison, 2021 to 2051



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.).[2] The growth scenarios presented in the Phase 1 Norfolk County Growth Analysis report and summarized in Figure 1 in this technical memorandum have been assessed against the MoF forecasts for the Norfolk-Haldimand C.D. and primary commuter-shed. The forecasts for Norfolk County and Haldimand County, as well as the municipalities within the primary commuter-shed 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

[2] 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.

an annual rate of 1.3% and 1.8% under the Medium and High Growth Scenarios, respectively.

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 MoF Reference forecast.[3]

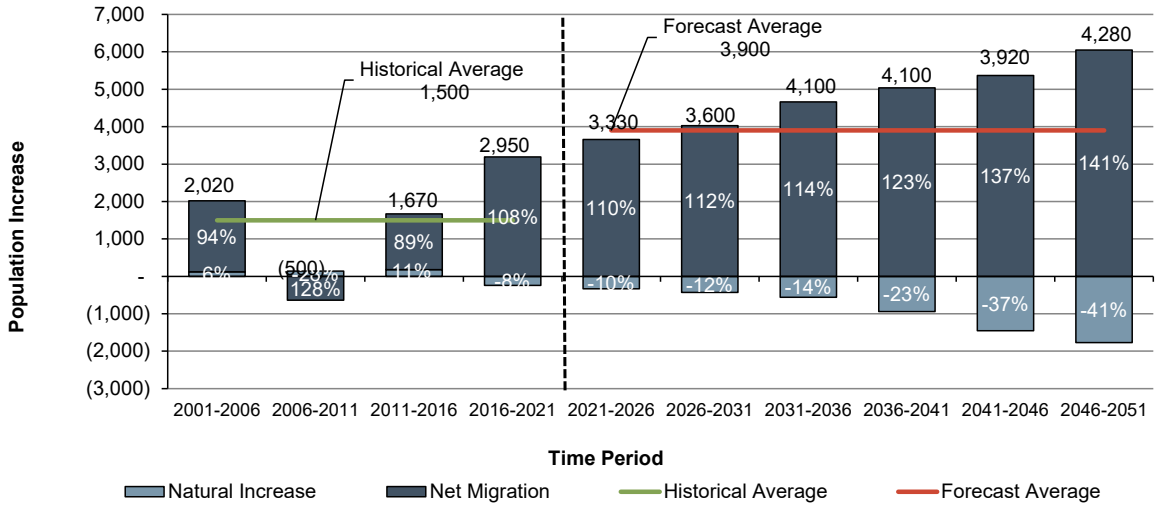
2.3 Higher Population Growth in Norfolk County will Require a Significant Sustained Increase in Net Migration

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.

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 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.

[3] Ontario's Need for 1.5 Million More Homes. Smart Prosperity Institute. August 2022.

Figure 4
Norfolk County
Components of Population Growth (High Growth Scenario)



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

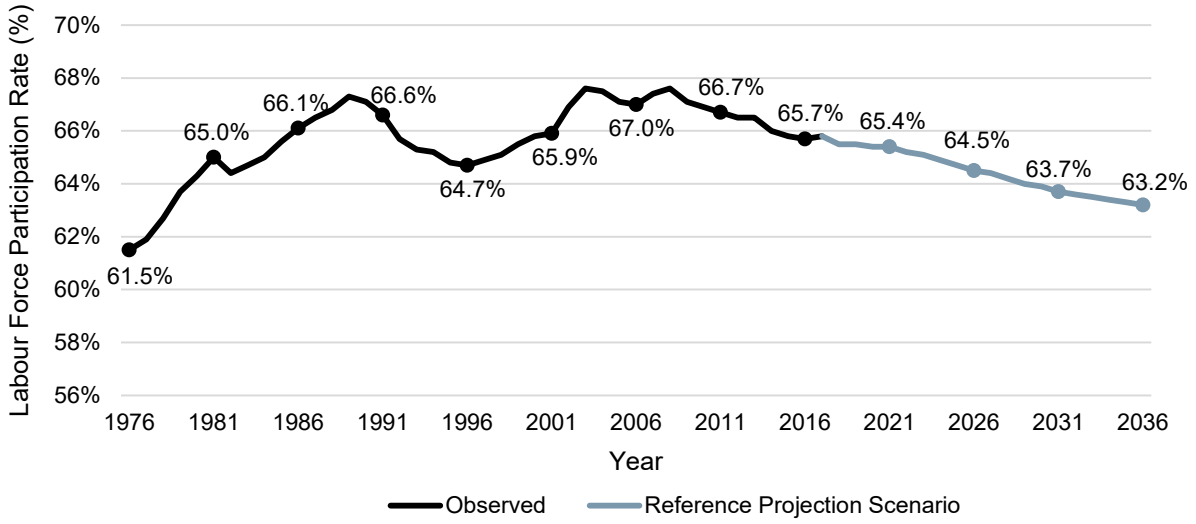
2.4 Labour Force Outlook

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.[4] The labour force participation rate is defined as the percentage of the population that is actively participating in the labor 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 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.

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

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.

Figure 5
Canada
Historical (1981 to 2017) and Projected (2017 to 2036) Labour Force Participation Rate



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.

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 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 2 is based on the High Growth Scenario presented in the Phase 1 report, which has been briefly summarized herein (refer to section 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, [5] and the information on Inter Urban Water Supply timelines.[6]

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 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 2A aligns growth to servicing capacity, however, it aims to utilize all the planned expansions for Port Dover and Port Rowan. Under option 2A, a higher amount of growth is allocated to the settlement area of Port

[5] Norfolk County Information Memo – Servicing Monitoring Report – Water and Wastewater EIS-22-077 dated September 20, 2022.

[6] Norfolk County Inter-Urban Water Supply Program Phase and Timeline Data, as of January 2023.

Dover and Port Rowan due to the availability of land and aims to utilize all the servicing capacity (available and proposed upgrades and proposed expansions) by 2051.

In comparison, 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 7 provides a summary of the growth allocation options, while Figure 8 shows the allocation of housing for each of the County's settlement areas under each option.

Figure 6
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 7
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				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%
Total	**8,330**	**9,600**	**9,600**	**9,600**	**1,270**	**1,270**	**1,270**	**100%**	**100%**	**100%**	**100%**

Source: Watson & Associates Economists Ltd., 2023.

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

Building on the growth allocations options discussed in section 3, Figure 9 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 9, 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.[7] 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.

[7] Detailed land supply information has been prepared by the County and provided in Volume 4.

Figure 8
Norfolk County
Land Needs 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	3,796	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	2,323	571	651	(218)	3,571
	Residential Land Surplus/ Need (Gross ha)	12	9	216	53	60	(20)	332
Option 2	2021-2048 Forecast*	114	921	1,254	359	1,826	876	5,330
	Housing Unit Shortfall/ Surplus	51	(289)	2,542	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)	3,305	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)	3,703	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.

5. Summary of Stakeholder Expansion Requests

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 ha.[8] Figure 10, 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.[9] As shown in Figure 10, 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 an approximately 43-year supply of additional greenfield housing under the High Growth Scenario presented in this technical memorandum.

As previously noted in section 4, the County's urban land needs are not homogenous by urban settlement area. Accordingly, 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 9).

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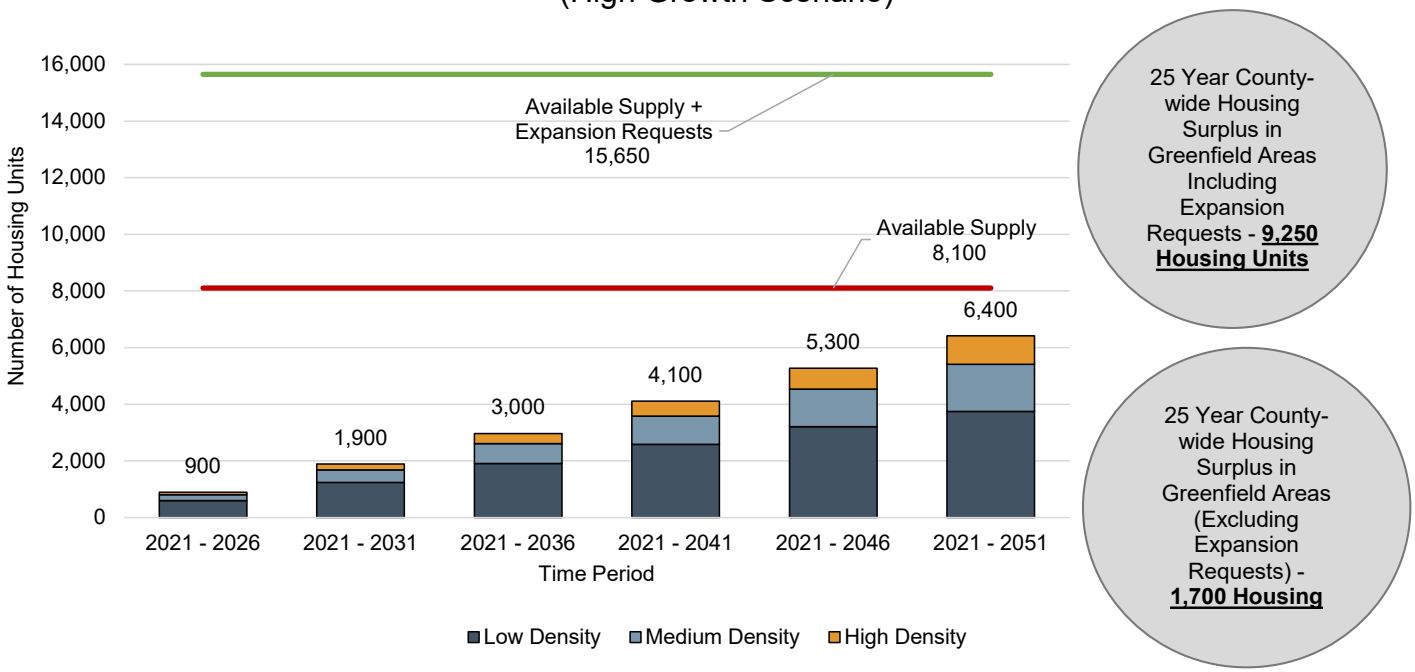
[8] It is noted that this number represents information from only 11 out of 27 expansion requests concerning urban settlement area boundary expansion/conversion of employment to residential areas. The remaining requests do not provide a housing unit estimate. Accordingly, the housing unit estimate associated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

[9] The housing demand and supply presented in this section are based on a 25% intensification rate. If the County intends to go with a higher intensification rate, it will put downward pressure on greenfield housing demand and the overall surplus will increase.

Figure 9
Norfolk County
Available Supply & Expansion Requests vs. Forecast in Greenfield Areas
(High Growth Scenario)



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.

6. Conclusions

The following key observations are presented in this technical memorandum:

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

b) On a County-wide level, there is a surplus of vacant designated residential land supply to accommodate the High Growth Scenario. Under the High Growth Scenario, the County has approximately 40 years of vacant, designated, greenfield housing supply. Notwithstanding this calculated oversupply, some 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.

c) Further assessment is recommended to evaluate the each of the growth options based on a range of planning, financial, infrastructure development criteria.

   This is a preliminary analysis based on an overview of available urban land supply, forecast housing demand and municipal servicing capacity. Additional assessment may be required to better understand housing market, planning, municipal servicing and financial implications related to each of the growth options. Additional evaluation will also be required to determine the preferred location option for urban expansion (if deemed required).

d) The County and Consultant Team will also undertake an assessment of the scenarios and options for employment growth within the County. Recommendations on the preferred growth options will be prepared based on further discussions with County Staff. It is anticipated that the draft recommendations for Council will be completed in the Fall 2023.