



Growth Management Strategy 2020

Township of Cavan Monaghan

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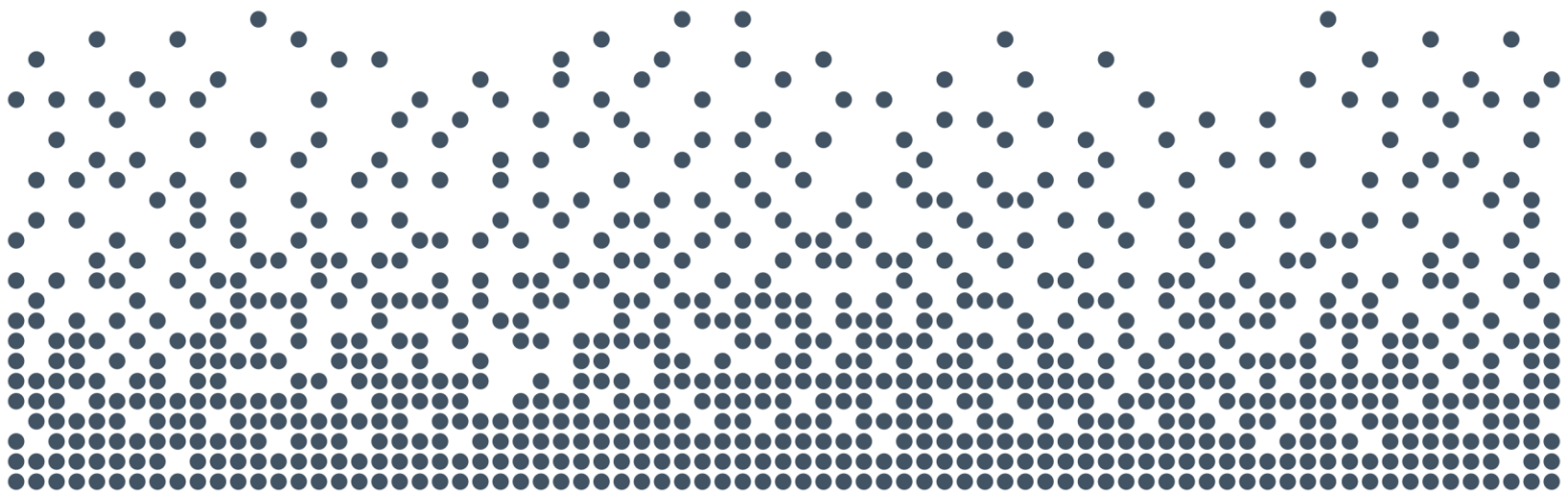
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List of Acronyms and Abbreviations

B.U.A.	Built-Up Area
D.G.A.	Designated Greenfield Area
G.D.P.	Gross Domestic Product
G.M.S.	Growth Management Strategy
G.T.A.	Greater Toronto and Hamilton Area
L.Q.	Location Quotient
M.C.R.	Municipal Comprehensive Review
M.O.F.	Ministry of Finance
M.M.A.H.	Ministry of Municipal Affairs and Housing
N.F.P.O.W.	No Fixed Place of Work
O.P.	Official Plan
O.R.M.	Oak Ridges Moraine
P.P.S.	Provincial Policy Statement
P.P.U.	Persons Per Unit
W.H.O.	World Health Organization



Executive Summary



Executive Summary

Watson & Associates Economists Ltd. was retained to develop a Growth Management Strategy (G.M.S.) for the Township of Cavan Monaghan, with the overall objectives being to provide:

- A comprehensive assessment of the Township's long-term population, housing and employment growth potential within the context of County-wide development trends and regional economic growth drivers;
- An understanding of whether there is an adequate supply of urban and rural lands to accommodate long-term demand and satisfy the Township's near-term and longer-term employment and population growth objectives; and
- Policy and strategic recommendations to manage and plan for growth within the context of the provincial, County, and Township planning policy framework.

The following provides a summary of the key findings provided in this report.

Population, Housing and Employment Growth, 2016 to 2041

- The reference scenario (High Growth Scenario) assumes an average annual growth rate of 2.2% for the Township over the 2016 to 2041 forecast period. Accordingly, under the High Growth Scenario, the Township total population would increase to 15,500 by 2041. Under this scenario, the rate of population growth is anticipated to remain relatively consistent throughout the entire forecast period, driven by comparatively stronger levels of continued net migration.
- The percentage of the Township's largest age cohort, 20 to 54 years of age, is forecast to decline from 43% in 2016 to 36% in 2041. Over the forecast period, the Township population base is expected to age significantly. Most notably, the percentage of population in the 75+ age group (older seniors) is forecast to almost triple over the forecast period from 7% in 2016 to 20% in 2041. The aging of the population and declining population growth resulting from natural increase (i.e. births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within the Township, and subsequently the regional labour force participation rate.
- The Millbrook Urban Settlement Area is already facing development pressures due to its proximity to the Greater Toronto Area (G.T.A.) and relatively affordable housing prices. As previously mentioned, recent infrastructure projects, such as



the completion of the Highway 407 extension to Highway 115, provide further opportunity for residents from the G.T.A. to relocate to the Township while still maintaining a relatively reasonable commute to work.

- The amount of recent building permit activity and the number of active large subdivision developments in the planning approvals process suggest that housing growth will remain strong in the Millbrook Urban Settlement Area over the next five to 10 years. It is noted, however, that new housing development activity in 2020 and 2021 may be negatively impacted due to the economic disruption caused by COVID-19.
- Between 2016 and 2041, forecast housing development is expected to average 120 units annually compared to an historical average of 24 units annually over the past 15 years.
- Over the 2016 to 2041 forecast period, new housing is forecast to be comprised of 65% low-density (singles and semi-detached), 21% medium-density (townhouses) and 14% high-density (apartments) units. A modest increase in the share of medium- and high-density housing forms is anticipated, largely driven by the aging of the population, potential opportunities in some settlement areas for communal servicing and continued upward pressure on local housing prices.
- Cavan Monaghan's employment is forecast to grow at an average annual rate of roughly 3.0%. This represents an average annual growth rate which is moderately higher than the most recent 15-year historical period of 2.3% annually. Under the High Growth Scenario, the Township's employment base is forecast to increase by approximately 3,800 jobs, increasing from 3,400 in 2016 to 7,200 by 2041.
- Land-based commercial, industrial and institutional employment sectors are anticipated to account for approximately 72% of employment growth over the forecast period. No fixed place of work and work at home employment categories are forecast to comprise the remaining 28% of employment growth. The primary sector (i.e. agriculture and other resource-based employment) is not anticipated to experience employment growth over the forecast period.

Residential Land Needs in the Millbrook Urban Settlement Area, 2041

- Over the 2019 to 2041 planning horizon, the Township is forecast to add a total of approximately 6,300 people to Millbrook.



- Based on Millbrook's supply of designated greenfield area (D.G.A.) lands, it is anticipated that the Township will need to expand the urban boundary in Millbrook to accommodate approximately 50 ha (124 acres) of additional residential lands.

Non-Residential Land Needs in the Millbrook Urban Settlement Area, 2041

- Over the 2019 to 2041 planning horizon, the Township is forecast to add a total of approximately 1,600 jobs to its Urban Employment Areas in Millbrook. Based on the Township's existing supply of developable vacant employment land, the Township has an urban employment land need (urban expansion requirement) of 30 ha (74 acres).
- Over the 2019 to 2041 planning horizon, the Township is forecast to develop approximately 8 ha (20 acres) of new commercial lands within the Millbrook Urban Settlement Area. Based on the supply of commercial lands in Millbrook, a commercial land need (urban expansion requirement) of 5 ha (12 acres) has been identified.

Planning for Future Rural Employment Areas in the Township of Cavan Monaghan

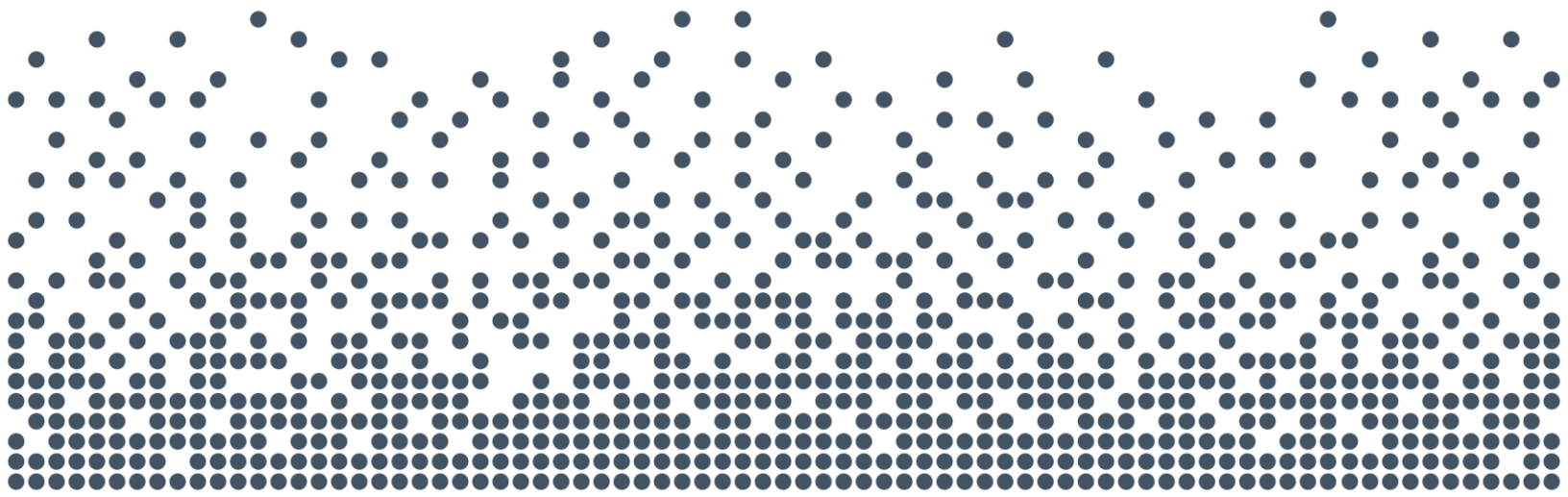
- The results of this G.M.S. have shown that there is no foreseeable need for additional Employment Area expansion in the Township's Rural Areas. A review of the developability and marketability of the Township's Rural Employment Areas, however, has resulted in a series of recommendations to both remove and add to the Township's Rural Employment Area designation.
- These recommendations are subject to the results of additional study in accordance with the 2020 P.P.S.
- These recommendations would not increase the Township's net supply of designated Rural Employment Areas; however, they are intended to improve the Township's competitive position with respect to the future development of these areas.¹

¹ The series of recommended removals and additions would need to undergo detailed review to refine their land areas such that the total land area of existing designated Rural Employment Areas remains the same.



Next Steps

- Implement the results of the Rural Employment Lands review in this study through a local Official Plan (O.P.) Amendment and Zoning By-Law Amendment, subject to compliance with the Provincial Policy Statement (2020), County O.P., and Township O.P.
- Provide the County of Peterborough with the study findings and broad location options related to settlement boundary expansion in order to inform the County's in-progress Municipal Comprehensive Review (M.C.R.) process, which will require the County's Official Plan to be updated by July 1, 2022. A second local Official Plan Amendment will be required related to the recommendations of the Township's urban lands subject to the results of the County's M.C.R.
- In addition to the above recommended policy amendments and considerations for the Township and County's M.C.R., additional land-use planning, employment, and economic development-related recommendations provided in this report include, but are not limited to:
 - Developing a marketing strategy to promote the Township's Employment Areas;
 - Developing a series of broad principles for evaluating proposed conversions in Employment Areas based on best practices, relevant provincial and County policies, and supporting documents;
 - Monitoring the Township's Urban and Rural Employment Area land supply to inform planning for and protecting its Employment Areas, as well as providing municipal services; and
 - Exploring the designation of regionally significant employment lands with the County and Peterborough and Kawartha Economic Development Corporation.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson) was retained by the Township of Cavan Monaghan to develop a Growth Management Strategy (G.M.S.) as background to the Township's Official Plan (O.P.). In general, the primary objectives of this study are to:

- Provide a comprehensive assessment of the Township's long-term population, housing and employment growth potential within the context of County-wide development trends and regional economic growth drivers;
- Ensure that there is an adequate supply of urban and rural lands to accommodate long-term demand which satisfies the Township's near-term and longer-term employment and population growth objectives; and
- Provide strategic policy recommendations within the context of the provincial, County, and Township planning policy framework.

More specifically, this G.M.S. provides a detailed assessment of the following:

- An overview of the provincial and County land-use planning policy framework regarding growth management within the Greater Golden Horseshoe (G.G.H.) and Peterborough County to the year 2041;
- Regional and local macro-economic and demographic trends that are anticipated to impact the amount, type and location of the Township's long-term population and employment growth potential;
- Future residential land supply opportunities within the Millbrook Urban Settlement Area, in active development plans, identified intensification areas within the built-up area (B.U.A.), as well as on vacant urban lands in designated greenfield areas (D.G.A.);
- Future non-residential land supply opportunities (i.e. Urban Employment Areas, Community Commercial) within the Millbrook Urban Settlement Area in active development applications as well as on vacant designated urban lands.
- The Township's designated Rural Employment Areas in terms of their developability, suitability and marketability within the context of physical/ environmental constraints and access to major transportation corridors as well as goods movement infrastructure;



- The allocation of long-term population, housing and employment growth between the Millbrook Urban Settlement Area and remaining rural areas of the Township;
- Forecast land demand within the Millbrook Urban Settlement Area in accordance with forecast population and employment growth as well as long-term trends in residential and non-residential density;
- Near-term priorities with respect to the development of Urban and Rural Employment Areas;
- Long-term residential and non-residential urban land needs within the Millbrook Urban Settlement Area; and
- A series of strategic policy recommendations to plan for, accommodate and monitor growth as well as land development across the Township.

It is anticipated that this study will form an important background document to the County of Peterborough's ongoing O.P. Review. The process of preparing the County's new O.P. represents a Municipal Comprehensive Review (M.C.R.), in accordance with section 26 of the *Planning Act*. This process is required to bring the County's O.P. into conformity with the 2019 Growth Plan for the G.G.H. (the Growth Plan),¹ as well as to reflect current provincial policy direction and the County's strategic initiatives. Integral to the County's O.P. is a comprehensive review of how new development will be planned, phased and accommodated to the year 2041 and beyond. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development.

In accordance with the Ontario provincial planning policy framework, the County's O.P. is required to be updated to conform to the policies of the Growth Plan, 2019 by July 1, 2022. The Province also directs that, for lower-tier municipalities such as the Township of Cavan Monaghan, that the conformity date for a local O.P. would be within one year of the Peterborough County O.P. taking effect.

This G.M.S. will also inform a local O.P. Amendment (O.P.A.) to implement the results of the Rural Employment Lands review, provided herein, subject to compliance with Provincial Policy Statement (2020), County O.P., and local O.P. policy. This O.P.A. is anticipated to be undertaken by the Township in 2020.

¹ A Place to Grow. Growth Plan for the Greater Golden Horseshoe. Ontario, 2019.



1.2 What is a Growth Management Strategy?

The Township's priorities focus on accommodating and managing future development in a manner that reflects the urban and rural nature of the Township, the provision of efficient and sustainable municipal and community infrastructure, and the creation of an environment that supports local businesses and improves economic development activity in the Township's Employment Areas.

Within the context of the above principles, this G.M.S. examines future long-term population and employment growth potential within the Township based on recent economic, socio-economic and demographic trends and future growth drivers at both a regional and local level. As previously mentioned, this study provides further insight into the growth potential and long-term land needs across the Township by settlement area. This G.M.S. represents an important study for the Township as it forms the foundation for the long-term Township of Cavan Monaghan land-use planning framework. This planning framework is essential in establishing a long-term vision for the Township regarding growth and economic development in a manner that embraces change but also preserves the Township's livability.



Chapter 2

Planning Policy Context



2. Planning Policy Context

This chapter provides an overview of the relevant provincial, County and local policies that apply to long-term growth management in the Township. These policies provide the framework for the analysis, recommendations, and strategic directions of the G.M.S.

2.1 Provincial Planning Policy Context

The two key provincial policy documents that apply to long-term growth management are the Provincial Policy Statement, 2020 (P.P.S.) and A Place to Grow, Growth Plan for the G.G.H. (Growth Plan), 2019. The policies set out in these documents outline provincial land-use planning interests and provide high-level policy direction for municipalities.

At the time of writing, the 2014 P.P.S. was in effect and a newly updated 2020 P.P.S. was released in late February 2020, with the expectation that the 2020 P.P.S. would be in effect on May 1, 2020. Both sets of policies are discussed to provide greater context of the provincial planning framework to manage growth, plan for housing and employment, and coordinate and implement provincial planning directions.

2.1.1 Provincial Policy Statement, 2014

The P.P.S. provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and came into effect on April 30, 2014. All planning decisions “shall be consistent with” the P.P.S. (*Planning Act*, R.S.O. 1990, P. 13 s. 3). It should also be noted that s. 4.4 of the P.P.S. establishes that the P.P.S. is to be read in its entirety and all relevant policies are to be applied to each situation.

For the purposes of this G.M.S., the following areas of the 2014 P.P.S. require consideration:

Settlement Areas (Policy 1.1.3)

The 2014 P.P.S. defines settlement areas as:

“Urban areas and rural settlement areas within municipalities (such as cities, towns, villages and hamlets) that are: a) built up areas where



development is concentrated and which have a mix of land uses; and, b) lands which have been designated in an Official Plan for development over the long term planning horizon provided for in policy 1.1.2. In cases where land in designated growth areas is not available, the settlement area may be no larger than the area where development is concentrated.”

The settlement area policies demonstrate that these areas remain the focus of growth and development in the long term. They further demonstrate the importance of achieving density and land-use mixes within these areas such that land, resources, and infrastructure are used efficiently. The policies continue to further outline the importance of providing a range of uses and opportunities for intensification and redevelopment.

The 2014 P.P.S. emphasizes prioritizing development through intensification and redevelopment prior to, or at the same time as, new development is occurring within designated growth areas.

It is evident through the settlement area policies that managing growth has a geographic and sequencing focus in order to minimize negative impacts to land, infrastructure, resource management, environment, climate change, and finances.

Policies of note to this study are:

- **Policy 1.1.2** – “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 up to 20 years. However, where an alternate time period has been established for specific areas of the Province as a result of a provincial planning exercise or a *provincial plan*, that time frame may be used for municipalities within the area.

Within *settlement areas*, sufficient land shall be made available through *intensification* and *redevelopment* and, if necessary, *designated growth areas*.

Nothing in policy 1.1.2 limits the planning for *infrastructure* and *public service facilities* beyond a 20-year time horizon.”

- **Policy 1.1.3.1** – “*Settlement areas* shall be the focus of growth and development, and their vitality and regeneration shall be promoted.”
- **Policy 1.1.3.5** – “Planning authorities shall establish and implement minimum targets for *intensification* and *redevelopment* within built-up



areas, based on local conditions. However, where provincial targets are established through *provincial plans*, the provincial target shall represent the minimum target for affected areas.”

- **Policy 1.1.3.7** – “Planning authorities shall establish and implement phasing policies to ensure:
 - a) that specified targets for *intensification* and *redevelopment* are achieved prior to, or concurrent with, new development within *designated growth areas*; and
 - b) the orderly progression of development within *designated growth areas* and the timely provision of the *infrastructure* and *public service facilities* required to meet current and projected needs.”
- **Policy 1.1.3.8** – “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 it has been demonstrated that:
 - a) sufficient opportunities for growth are not available through *intensification*, *redevelopment* and *designated growth areas* to accommodate the projected needs over the identified planning horizon;
 - b) the *infrastructure* and *public service facilities* which are planned or available are suitable for the development over the long term, are financially viable over their life cycle, and protect public health and safety and the natural environment;
 - c) in prime agricultural areas:
 - 1. the lands do not comprise *specialty crop areas*
 - 2. alternative locations have been evaluated, and
 - i. there are no reasonable alternatives which avoid *prime agricultural areas*; and
 - ii. there are no reasonable alternatives on lower priority agricultural lands in *prime agricultural areas*;
 - d) the new or expanding *settlement area* is in compliance with the *minimum distance separation formulae*; and
 - e) impacts from new or expanding *settlement areas* on agricultural operations which are adjacent or close to the *settlement area* are mitigated to the extent feasible.

In determining the most appropriate direction for expansions to the boundaries of *settlement areas* or the intensification of a *settlement area* by a planning authority, a planning authority shall apply the policies of section 2: Wise Use and Management of Resources and section 3: Protecting Public Health and Safety.”



Rural Areas in Municipalities (Policy 1.1.4) and Rural Lands in Municipalities (Policy 1.1.5)

An extensive update was made to the Rural Areas in Municipalities and Rural Lands in Municipalities policy sections of the 2014 P.P.S. Rural areas are described as a system of lands that include rural settlement areas, rural lands, prime agricultural areas, natural heritage features and areas, and other resources. Both policy sections describe supporting healthy, integrated, and viable rural areas by building on rural character and leveraging rural amenities and assets, promoting regeneration such as by the redevelopment of brownfield sites, using rural infrastructure efficiently, promoting the diversification of the economic base and employment opportunities, and providing opportunities for sustainable and diversified tourism.

This policy describes that in rural areas, rural settlement areas are the focus of growth and development. In cases where rural lands do not have a settlement area, examples of permitted uses include resource-based recreational uses, limited residential development, and the management or use of resources.

Both the rural areas and rural lands policies emphasize the need to provide opportunities that diversify the rural economy, promote tourism and recreational opportunities, and consider the rural character when directing development.

Policies of note to this study are:

- **Policy 1.1.4.1** – “Healthy, integrated and viable rural areas should be supported by:
 - a) building upon rural character, and leveraging rural amenities and assets;
 - b) promoting regeneration, including the redevelopment of brownfield sites;
 - c) accommodating an appropriate range and mix of housing in rural settlement areas;
 - d) encouraging the conservation and redevelopment of existing rural housing stock on rural lands;
 - e) using rural infrastructure and public service facilities efficiently;
 - f) promoting diversification of the economic base and employment opportunities through goods and services, including value-added products and the sustainable management or use of resources.”



- **Policy 1.1.4.2** – “In *rural areas*, *rural settlement areas* shall be the focus of growth and development and their vitality and regeneration shall be promoted.”
- **Policy 1.1.4.3** – “When directing development in *rural settlement areas* in accordance with policy 1.1.3, planning authorities shall give consideration to rural characteristics, the scale of development and the provision of appropriate service levels.”
- **Policy 1.1.4.4** – “Growth and development may be directed to *rural lands* in accordance with policy 1.1.5, including where a municipality does not have a *settlement area*.”
- **Policy 1.1.5.4** – “Development that is compatible with the rural landscape and can be sustained by rural service levels should be promoted.”
- **Policy 1.1.5.5** – “Development shall be appropriate to the *infrastructure* which is planned or available, and avoid the need for the unjustified and/or uneconomical expansion of this *infrastructure*.”
- **Policy 1.1.5.7** – “Opportunities to support a diversified rural economy should be promoted by protecting agricultural and other resource-related uses and directing non-related development to areas where it will minimize constraints on these uses.”
- **Policy 1.1.5.8** – “*Agricultural uses, agriculture-related uses, on-farm diversified uses and normal farm practices* should be promoted and protected in accordance with provincial standards.”

Coordination (Policy 1.2)

The purpose of coordination policies in the P.P.S. is to describe how planning matters should be approached within the Province and the relationship between planning authorities when addressing those planning matters. In the 2014 P.P.S., the coordination policies describe approaching planning matters in an integrated and comprehensive fashion. These planning matters range from managing and/or promoting growth and development, to addressing housing needs and preparing population, housing, and employment projections. More specifically, policy 1.2.4. addresses the requirement for municipalities to: allocate population, housing, and employment; identify areas to direct growth and development; identify targets for intensification and redevelopment; identify density targets adjacent to transit corridors (where applicable); and, provide policy direction on cross-municipal boundary matters.



For the Township of Cavan Monaghan, this relates to the coordination of growth within its jurisdictional boundaries between its various settlement areas, and specifically for the Millbrook Urban Settlement Area.

It is through this study that population, housing, and employment forecasts for the Township have been prepared. This analysis has been conducted to assess the Township's long-term urban land needs over a 20-year planning horizon. While the focus of this study is on the Millbrook Urban Settlement Area, it is noted that the Township continues to experience some growth pressures in a few of its rural Hamlet and Employment Areas.

Employment (Policy 1.3)

The employment policies of the 2014 P.P.S. focus on protecting and preserving Employment Areas for current and future uses, providing an appropriate mix and range of employment and institutional uses in order to promote economic development and competitiveness, and providing opportunities for a diversified economic base. It further suggests planning authorities may plan beyond 20 years for the long-term protection of Employment Areas, provided lands are not designated beyond the 20-year planning horizon.

Provincial employment policies also address employment conversion, noting that through a comprehensive review, conversions are permitted within Employment Areas to non-employment uses provided it has been demonstrated the land is not required for employment purposes over the long term and a conversion is needed.

The employment policies altogether work through land-use planning and economic development mechanisms to develop resilient economies and future employment conditions.

Housing (Policy 1.4)

The housing policies of the 2014 P.P.S. recognize the importance of municipalities providing a range and mix of housing types and densities to address current and future residents of the regional market area.¹ The 2014 P.P.S. specifically describes two

¹ The 2014 P.P.S. defines a regional market area as, “an area that has a high degree of social and economic interaction.”



requirements that planning authorities shall address in order to provide for this range and mix:

- (a) “maintain at all times the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands designated and available for residential development; and
- (b) maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment, and land in draft approved and registered plans.”

The policies direct other provisions that need to be met in order to provide for a range and mix of housing types and densities. Examples of these include: establishing and implementing minimum targets for providing housing that is affordable to low and moderate income households; permitting and facilitating all forms of residential intensification and redevelopment; promoting densities for new housing that efficiently use land, resources, infrastructure, and support active transportation and transit; and directing new housing development towards locations where appropriate levels of infrastructure are or will be available to support current and projected needs.

The policies demonstrate there is a clear need to direct future housing growth to consist of a range and mix of housing types and densities most appropriate to a municipality and its social and economic conditions.

2.1.2 Provincial Policy Statement, 2020

On July 22, 2019, a proposed updated P.P.S. was released by the Province for public review and comment. Its purpose was to update the 2014 P.P.S. so that it worked together with changes to the provincial land-use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019) and an update to the Growth Plan for the G.G.H. (2017) which became *A Place to Grow: Growth Plan for the G.G.H.* (2019). Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and reduce barriers and costs to the land-use planning system in order to provide greater predictability.



In late February 2020, the 2020 P.P.S. was issued, with the in-effect date being May 1, 2020. Although the 2020 P.P.S. will be in effect after the conclusion of this study, it is still important to describe the types and magnitude of changes that will soon affect managing growth and planning for housing, employment, and infrastructure in the future. For example, policy 1.1.2 in the 2014 P.P.S. required municipalities to have enough urban land supply to meet projected needs for a planning horizon of 20 years, but did not limit planning for infrastructure beyond that planning horizon. The 2020 P.P.S. changes this planning horizon to 25 years and includes Employment Areas as areas that could be planned for beyond that horizon, provided that they are not designated beyond the planning horizon. These changes largely relate to the goal of the proposed 2020 P.P.S. to support the economy and job creation, in addition to providing greater predictability to the land-use planning system.

Through a change in policy language from “shall” to “should,” the 2020 P.P.S. suggests a more encouraging rather than directive approach to ensuring new development in designated growth areas take a compact form (policy 1.1.3.6). This similar sentiment is expressed in proposed changes to phasing policies – phasing policies are encouraged to be used to manage intensification, redevelopment, and new development in designated growth areas (policy 1.1.3.7).

Throughout the 2020 P.P.S., there is strong encouragement to consider the market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms that they have not historically had considerable success in implementing. As such, when discussing the outlook for the real estate market, it is important to discuss both existing conditions as well as the driving factors which are anticipated encourage and disrupt housing market demand by structure type and built form. Furthermore, while market demand is important when considering long-range land-use planning, this demand must be broadly considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and, diversifying an economic base and supporting job creation.



Other areas that the changes have impacted include settlement boundary expansions, employment, and housing. Policy 1.1.3.9 for settlement boundary expansions outlines that adjustments of boundaries could be made outside of a comprehensive review provided the expansion would not result in a net increase in land within the settlement areas, the adjustment would support the municipality's ability to meet intensification and redevelopment targets established by the municipality, prime agricultural areas are addressed, and the settlement area with the added lands is appropriately serviced and it could be demonstrated that there is sufficient reserve infrastructure capacity to service the lands. These conditions for a settlement boundary expansion to occur outside of a comprehensive review pose additional questions such as: What threshold of a settlement boundary expansion request is required to encourage the use of this policy? What would differentiate settlement boundary expansion requests within and outside of a comprehensive review? How would a settlement boundary expansion outside of a comprehensive review improve the efficiencies of the land-use planning system?

The employment and housing policies of the 2020 P.P.S. underwent the most changes in terms of level of specificity. The 2014 P.P.S. recognizes the significant economic contribution of Employment Areas, the importance of planning for Employment Areas to take advantage of economic and strategic opportunities, and the protection and preservation of Employment Areas. The employment policies of the 2020 P.P.S., however, are relatively detailed in how municipalities should plan for employment in order to implement the employment policy intents of the 2014 P.P.S. The 2020 P.P.S. policies suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The 2020 P.P.S. policies further outline that, during an Official Plan review or update, planning authorities assess Employment Areas in local Official Plans to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2). The policies continue by recognizing the long-term operational and economic viability of Employment Areas planned for industrial and manufacturing uses and directing the planning for these areas to be separated or mitigated from sensitive land uses. Finally, the 2020 P.P.S. employment policies outline that lands within existing Employment Areas may be converted to non-employment uses provided the area has not been identified as provincially significant through a provincial plan exercise, or regionally significant by a regional economic development corporation (policy 1.3.2.5). The policies further outline that there be an identified need for the



conversion and that the land is not required for employment purposes over the long term, the proposed uses would not adversely affect the overall viability of the Employment Area, and the existing or planned infrastructure is available to accommodate the proposed uses. The 2020 P.P.S. employment policies demonstrate a significant provincial and regional emphasis on establishing and protecting a network of functional and market- and investment-ready Employment Areas throughout the Province.

Similar to the 2020 P.P.S. employment policies, its housing policies detail approaches to providing and maintaining a housing supply more closely resembling market realities. The 2020 P.P.S. housing policies still direct planning authorities to always maintain a housing supply; however, the minimum number of years it is to be maintained has changed from 10 to 15 (policy 1.4.1). The policies also state that single-tier municipalities may choose to maintain land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate intensification and redevelopment, and land in draft approved and registered plans (policy 1.4.1).

The most significant change of the 2020 P.P.S. housing policies is the provision of housing options rather than types in order to address an appropriate range and mix of housing, and specifically meeting market-based needs of current and future residents (policy 1.4.3). Providing for housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.

Applicable to the Township is the agriculture policies of the 2020 P.P.S. and the need to protect prime agricultural areas for the long-term use for agriculture. Prime agricultural areas are defined as:

Areas where prime agricultural lands predominate. This includes areas of prime agricultural lands and associated Canada Land Inventory Class 4



through 7 lands, and additional areas where there is a local concentration of farms which exhibit characteristics of ongoing agriculture. *Prime agricultural areas* may be identified by the Ontario Ministry of Agriculture and Food using guidelines developed by the Province as amended from time to time. A *prime agricultural area* may also be identified through an alternative agricultural land evaluation system approved by the Province.

Seeing as the definition of prime agricultural areas is dependent on the definition of prime agricultural lands, the definition of prime agricultural lands is also provided below:

Specialty crop areas and/or Canada Land Inventory Class 1, 2, and 3 lands, as amended from time to time, in this order of priority for protection.

It is noted in the 2020 P.P.S. that in order to maintain and enhance the geographic continuity of the agricultural land base and support the agri-food network,¹ a systems approach is encouraged to be used. Permitted uses in prime agricultural areas include agricultural uses (e.g. growing of crops; raising livestock; raising other animals for food, fur, or fibre, including poultry and fish; aquaculture; agro-forestry; and associated on-farm buildings and structure such as livestock facilities and accommodation for full-time labour depending on the size and nature of the operation), agriculture-related uses (e.g. farm-related commercial and industrial uses directly related to farm operations, support agriculture, and benefit from being in close proximity to farm operations), and on-farm diversified uses (e.g. home occupations, home industries, agri-tourism uses).

Of importance in the 2020 P.P.S. related to agriculture is that planning authorities may only exclude land from prime agricultural areas for expansions of or identification of settlement areas in accordance with policy 1.1.3.8 where these expansions and identifications are identified through a comprehensive review and undertaking the required studies and analyses.

Although the 2020 P.P.S. is not yet in effect at the time of writing, it is important to be aware of these soon-to-be-in-effect policies, and how they emphasize the need for

¹ 2020 P.P.S. defines this as: Within the agricultural system, a network that includes elements important to the viability of the agri-food sector such as regional infrastructure and transportation networks; on-farm buildings and infrastructure; agricultural services, farm markets, distributors, and primary processing; and vibrant, agriculture-supportive communities.



municipalities to use a market-based approach for overall growth management and the provision of housing and employment supply across the Province.

2.1.3 Provincial Growth Plan for the Greater Golden Horseshoe

The Growth Plan, 2019 sets out where and how growth will occur across the G.G.H. to 2041 and all planning decisions are required to conform to the Plan.¹ The Growth Plan provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. Relevant aspects of the Growth Plan, 2019 for this study include the following:

- Growth will be directed to settlement areas and within settlement areas it will be focused to strategic growth areas, locations where higher order transit exists or is planned, and areas with existing or planned public services facilities;
- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential with convenient access to local stores, services and public service facilities;
- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of mixed-use, transit-supportive, pedestrian-friendly urban environments;
- New revised minimum density targets for upper-tier and single-tier municipalities have been created for the horizon of the Growth Plan, 2019. It is important to note that the greenfield density targets established in the Growth Plan, 2019 no longer include Employment Areas.² According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, the Province, and other appropriate stakeholders, will each develop an employment



¹ A Place to Grow: Growth Plan for the Greater Golden Horseshoe (Growth Plan). 2019

² As per the Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.7 pp. 23 and 24.



strategy that includes establishing a minimum density target in Employment Areas;¹ and

- The Growth Plan, 2019 provides population and employment forecasts for upper-tier and single-tier municipalities which will apply throughout a M.C.R.

Figure 2-1 summarizes the 2019 Growth Plan population and employment forecast for Peterborough County, excluding the City of Peterborough. Peterborough County had approximately 58,700 people² and 17,300 jobs in 2016. As summarized below, Peterborough County is forecast to reach a population of approximately 76,000 by 2041, adding approximately 17,300 people between 2016 to 2041. With respect to employment, the County is forecast to reach 24,000 jobs by 2041, adding approximately 6,700 jobs from 2016.

Figure 2-1
Growth Plan, 2019 Population and Employment Forecast for Peterborough County

Growth Plan, 2019 Forecast						
Peterborough County	Population			Employment		
	2031	2036	2041	2031	2036	2041
	70,000	73,000	76,000	20,000	21,000	24,000

Source: Growth Plan for the Greater Golden Horseshoe, 2019

It is noted that the Ontario Growth Secretariat (O.G.S.) at the Ministry of Municipal Affairs and Housing (M.M.A.H.) is currently seeking consulting services to lead the Ministry's review and update of the population and employment forecasts set out in Schedule 3 of the Growth Plan, 2019 under direction of the Ministry. Updated Growth Plan, 2019 (Schedule 3) population and employment growth allocations are anticipated to be released by the Province in the summer/fall of 2020.

2.1.4 Provincial Land Needs Assessment Methodology

On May 4, 2018 the M.M.A.H. released the final methodology for the Land Needs Assessment (L.N.A.) in the G.G.H. in accordance with Growth Plan, 2017 policy 5.2.2.1 c).³ Upper- and single-tier municipalities in the G.G.H. are required to use this

¹ As per the Growth Plan for the Greater Golden Horseshoe, 2019, section 2.2.7 pp. 23 and 24.

² 2016 population and employment figures are rounded. 2016 population base includes a Census undercount adjustment of approximately 2.5%.

³ Land Needs Assessment Methodology for the Greater Golden Horseshoe. Ontario. May 4, 2018.



methodology to assess the quantity of land required to accommodate forecast growth in conformity with the policies in the Growth Plan, 2017. It is important to note that the L.N.A. methodology is under review by the Province as a requirement of conformity with the Growth Plan, 2019. The revised L.N.A. is scheduled to be released by the Province during the summer of 2020. At this time, it is not certain what future changes may occur to the L.N.A. Key areas of consideration related to this review also include: market demand, transition to conformity, comprehensiveness, simplifying and shortening and format options.

The L.N.A. methodology identifies that the results of a land needs assessment can only be implemented through an M.C.R. In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

Community Areas: Areas where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment land employment jobs. Community areas include *delineated built-up areas* [B.U.A.] and the *designated greenfield area* [D.G.A.] (excluding *Employment Areas*).

Employment Areas: Areas where most of the employment land employment (employment in industrial-type buildings) jobs are, as well as some office jobs and some population-related jobs, particularly those providing services to the *employment area*. *Employment areas* (including *prime Employment Areas*) may be located in both *delineated built-up areas* [D.G.A.] and the *designated greenfield area* [D.G.A.].¹

In total, the L.N.A. methodology provides six key respective steps to establishing Community Area and Employment Area land needs. The six key steps for Community Area land needs are found in section 3.3 of the L.N.A., and in section 4.3 for Employment Area land needs.^{2, 3}

¹ Land Needs Assessment Methodology for the Greater Golden Horseshoe. Ontario. May 4, 2018, p. 14.

² Ibid., pp. 21 to 69.

³ Ibid., pp. 73 to 105.



2.2 County of Peterborough Official Plan

The County of Peterborough O.P. (March 2020 Office Consolidation) was reviewed as it relates to growth management, housing, and employment directions that affect the Township of Cavan Monaghan.

In the County of Peterborough O.P., settlement areas are identified as the preferred growth areas, having a role as the primary employment centres and location for commercial and industrial uses. Furthermore, policy 1.2.3. of the County of Peterborough O.P. outlines that approximately 16% of the County's population growth from 2006 to 2031 is to be allocated to the Township of Cavan Monaghan, which is the second highest population growth allocation to the year 2031 across the County.

Although the County of Peterborough O.P. notes that the County will recognize the 40% Intensification Target of the Growth Plan,¹ it was a target established under the previous 2006 Growth Plan that is no longer in effect. In the in-effect Growth Plan, 2019, policy 2.2.2. b) states that:

The City of Kawartha Lakes and the Counties of Brant, Dufferin, Haldimand, Northumberland, Peterborough, Simcoe and Wellington will, through the next municipal comprehensive review, each establish the minimum percentage of all residential development occurring annually that will be within the delineated built-up area, based on maintaining or improving upon the minimum intensification target contained in the applicable upper- or single-tier Official Plan.

In lieu of this change in provincial policy direction with respect to the intensification target to be applied to the County of Peterborough, this G.M.S. assessed the intensification target provided in the Township of Cavan Monaghan O.P. (policy 4.1.4). This is further discussed in section 2.3.

Policy section 5.1 of the County of Peterborough O.P. provides directions to plan for housing across the County. Policy directions generally promote the orderly development of new housing which:

¹ By the year 2015 and for each year thereafter, a minimum of 40% of all residential development will be within the built-up areas of the County.



- Makes efficient use of municipal services and infrastructure (e.g. transportation, education, recreation, and servicing systems);
- Provides for a range and mix of housing in the local municipalities such that growth over the planning horizon is accommodated for; and
- Maintains a minimum amount of housing supply in the development process or through designated residential lands.

With respect to greenfield density, the D.G.A. density target established in the County's O.P. is 40 residents and jobs per hectare. A similar D.G.A. density target is directed in the Growth Plan, 2019 policy 2.2.7 b); however, the provincial D.G.A. density target is applied to the 2041 planning horizon, as opposed to 2031 in the County of Peterborough O.P. Section 2.2.7 b) of the Growth Plan, 2019 states:

The City of Kawartha Lakes and the Counties of Brant, Dufferin, Haldimand, Northumberland, Peterborough, Simcoe and Wellington will plan to achieve within the horizon of this Plan a minimum density target that is not less than 40 residents and jobs combined per hectare.

The County of Peterborough O.P. policies related to servicing (policy section 4.7) establish a hierarchical approach to the provision of municipal sewage and water services. Full municipal sewage and water services are the preferred servicing form for settlement areas, followed by communal services for multiple lots/units where full municipal services are not available, and then individual services for more than five lots in areas outside settlement areas. The County of Peterborough O.P. discourages development on partial services except in situations where it is needed to remedy existing services that have failed, or within Settlement Areas to allow for infilling and rounding out of existing development on partial services subject to certain conditions. For settlement areas with full municipal services, plans for expansion or new services to serve growth are to be provided in a manner that supports the achievement of the County's intensification target and density targets.

In addition to growth-management-related policies, the County of Peterborough O.P. also contains policies regarding economic development (policy section 4.6), with the overall objectives to encourage an appropriate supply of land for long-term development and aggressively market to investors in all sectors of the economy. It proceeds to list policies for the Industrial and Commercial Sector (policy 4.6.3.2), with the most notable policy directions of the County being:



- Promoting and directing industrial and commercial uses to serviced settlement areas or to commercial and industrial areas established and designated in O.P.s of the local municipalities;
- Encouraging local municipalities to designated business parks and employment zones in settlement areas and to promote development of “dry industrial uses” in these areas;
- Directing industrial growth to designated lands in settlement areas, business parks, and employment zones where industry is a permitted use; and
- Encouraging local municipalities to maintain a sufficient supply of appropriately designated land for commercial and industrial uses to meet growth forecasts, and to plan for and provide infrastructure appropriate for these uses.

The County of Peterborough O.P. policies further recognize the need to encourage and protect agriculture as an industry and cultural resource within the County (policy 4.3.3.2. In this respect, the policies generally encourage:

- The promotion of complementary on-farm activities that contribute to the ongoing financial viability of the farm operation;
- Agricultural oriented industrial and commercial uses to be permitted outside identified settlement areas, subject to compliance with natural environmental and rural and cultural landscape related policies;
- Non-agricultural and non-tourism oriented industrial and commercial uses to be permitted outside identified settlement areas provided they consider and support the cultural and rural character of the area;
- Agricultural uses and normal farm practices in prime agricultural areas be promoted and protected; and
- The investigation and promotion of programs supportive of agriculture.

The County of Peterborough’s home-based businesses related policies recognize that there is a presence and promotion of home-based businesses throughout the County. In this respect, the County’s O.P. aims to support the creation of home-based businesses and encourage its local municipalities to adopt home-based business policies subject to their local circumstances.



2.3 Township of Cavan Monaghan Official Plan

Within the context of growth management, this section briefly summarizes relevant policies of the Township's O.P. (January 2018 Office Consolidation) related to the settlement area, agricultural areas, and rural Employment Area designations, in addition to economic development, home-based businesses, housing, density, and employment targets.

Settlement Area O.P. Policies

The settlement area policies contain two designations: Hamlets and Millbrook Urban Settlement Area. The Township's O.P. directs almost three quarters (70% as per policy 1.4) of the Township's household growth to the Millbrook Urban Settlement Area. The O.P. further outlines that limited growth be accommodated in the Hamlet areas, and that growth in these areas take on a more rounding out and infill nature that is sustainable and maintains the character of these smaller communities.

In the Millbrook Urban Settlement Area, the designations of most interest to this study include Residential, Community Core, Community Commercial, and Urban Employment Areas. The overall objectives of the Residential policies are to provide a range of housing types, promote the efficient use of existing and planning infrastructure through residential intensification, and ensure that a variety of complementary and compatible land uses (e.g. special needs housing, community facilities, schools, small-scale commercial and institutional uses, and open space areas) are permitted within the Residential Areas.

The Community Core policies apply to downtown Millbrook and along King Street West. Their objective is to develop, maintain, and promote the Community Core Area as a focal point for commerce, tourism, and pedestrian-scale activity in the Township. Furthermore, their objective is to encourage a mix of uses at densities that will enhance the character and vitality of the Community Core Area, as well as enhance its pedestrian-oriented environment. Examples of permitted uses in the Community Core policies include banks and financial services; business, professional, and medical offices; and personal service uses. These are all elements essential to B.U.A.s, downtown areas of urban settlement areas.



The Urban Employment Area designation applies to Employment Area lands located in the northern area tip of the Millbrook Urban Settlement Area. The overall objectives of the Urban Employment Area policies are to ensure that the Township is positioned to accommodate new and expanded business activities that provide jobs to local residents, mitigate land-use compatibility issues between Urban Employment Areas and surrounding lands, and encourage an attractive built form within the Urban Employment Areas.

Growth Management, Housing, and Employment-Related O.P. Policies

The Township's O.P. also provides, specific policies that focus on housing and residential growth targets, as well as employment targets. These policies are listed below:

- **Policy 2.1.1** – “The Township will manage population growth in a sustainable manner. This goal will be achieved by:
 - a) Directing growth primarily to the urban settlement of Millbrook with limited rural development to the year 2031;
 - b) Planning for residential growth of approximately 65 residential units per year to the year 2031, with most directed to the Millbrook urban serviced area.”
- **Policy 4.1.4** –
 - a) “It is a policy of this Plan to maintain a ten year supply of lands designated and available for residential development. Housing development through residential infilling, intensification and redevelopment within the built up area shown on Schedule A-1 shall provide 20 per cent of the Township's housing needs;
 - b) A three-year supply of land zoned for residential intensification and residential lots/units in registered and draft plan approved subdivisions within the context of the population target contained in this Plan shall be maintained provided that there is sufficient water and wastewater capacity available to service development;
 - c) It is a policy of this Plan to ensure the provision of a complete range of housing types in Millbrook. On this basis, the optimum housing unit mix within the boundaries of Millbrook are:



75 percent low density housing (single, semis, duplex);
10 percent medium density housing (multiple unit, townhouse);
and,
15 percent high-density housing (apartments).”

- **Policy 2.1.3** – “The Township will promote economic development and more employment opportunities within the community. This goal will be achieved by:
 - a) Targeting an employment to population ratio of 1 job for every 3 people.”

The above policies regarding residential growth targets, employment targets, and planning for housing were considered in preparing the long-term population, housing and employment forecast scenarios; allocating long-term growth forecasts by policy areas; and determination of urban land demand as part of this G.M.S.

Rural Employment O.P. Policies

The Rural Employment designation as mentioned earlier further distinguishes Commercial Entertainment and Airport Employment designations of the Rural Employment designations. The objectives of the Rural Employment Area are to identify areas where existing Rural Employment uses exist, provide opportunities for a variety of Rural Employment uses to meet the employment targets of the O.P., and ensure Rural Employment uses are compatible with adjacent land uses, agriculture, and the environment. The Rural Employment Area designation is focused on providing opportunities for employment uses that involve outdoor operations, generally provide goods and services to the rural community and businesses, are space-intensive uses with little requirement for water or sanitary services and dependent on inter-regional transportation infrastructure (e.g. Highway 115 and the Peterborough Airport).

The Airport Employment Area policies (policy 5.4.5.) apply to the area west of the Peterborough Airport and between Clifford Line and Moncrief Line. The land-use designation is meant to complement the abutting the Peterborough Airport, which is recognized as a key growth and economic development driver that draws economic activity specifically related to general aviation and manufacturing sectors directly on Peterborough Airport lands, to the abutting Airport Employment Area, and more generally towards the Township’s surrounding Rural Employment Areas. The Township’s O.P. notes that the objectives of its transportation and infrastructure policies



(policy section 7) are to protect the future operation and expansion of the Peterborough Airport.

The Commercial Entertainment policies (policy 5.4.6) apply to the southwest quadrant at Moore Drive and County Road 28 and the surrounding lands in the Fraserville community. The land-use designation recognizes the existing Kawartha Downs and Kawartha Slots commercial entertainment complex and intends to encourage a clustering of commercial entertainment uses (e.g. gaming facilities, theatres and entertainment auditoriums) and supportive uses (e.g. restaurants, parking, motels, hotels, convention facilities, and meeting facilities) within this location. It also conveys a preference for replacement and expansion of existing automobile and horse racing facilities (subject to the necessary planning and regulatory approvals), rather than developing new racing facilities.

Economic Development and Home-Based Businesses-Related O.P. Policies

Economic development policies in the Township's O.P. also outline goals for the Township's Employment Areas related to:

- The provision of a range of job opportunities and broad range of commercial and service facilities geared specifically to meet the needs of residents of the Township;
- The use of major transportation networks and goods movement infrastructure (e.g. Highway 115 and the Peterborough Airport);
- The promotion of downtown Millbrook as a focal point for tourism and population serving commercial facilities; and
- The development of home-based businesses provided they are compatible with adjacent land uses.

In relation to home-based business policies (policy 3.11), the Township's O.P. permits these types of businesses in all designations that permit residential uses and where a dwelling is a principle permitted use. They are, however, subject to some requirements that generally aim to ensure the business is wholly located within a dwelling unit, and that it is secondary to the primary use of the property as a residence to the person conducting the business.



Servicing-Related O.P. Policies

The Township's O.P. policies regarding the provision and phasing of servicing were also reviewed. The Township's O.P. outlines that one of the goals of the Plan (policy 1.3) is to direct development primarily to the existing designated urban serviced community of Millbrook and, to a lesser extent, the existing Hamlets in the Township. The policies also generally identify the preferred types of servicing provision between Urban and Rural Employment Areas. Privately serviced Employment Areas are encouraged to be developed in the vicinity of major transportation facilities, which are largely in Rural Employment Areas, while fully serviced Employment Areas are encouraged to be developed in the Millbrook Urban Settlement Area. The Township's O.P. policies related to Employment Areas also emphasize the importance of having a long-term supply of fully serviced Employment Area lands.

The Township's O.P. also notes in policy section 7.8.1 (Sewage Treatment) that the Township is subject to a loading phosphorus limit determined by the Bay of Quinte Remedial Action Plan (0.57 kg per day). The O.P. further notes that the Township plans to establish a new water and wastewater treatment plant to service Millbrook to maximize the permitted loading limit, and upon its expansion, it is anticipated that a capacity of 1,000 residential equivalent units would be provided. Finally, it is noted that Council shall maintain a 20 percent reserve of available capacity for non-residential uses and that employment uses shall consist of low water users or "dry industries" that generate only domestic sewage effluent rather than industrial wastewater as effluent. It should be further noted that in 2015, the Township completed the expansion of their Sewage Treatment Plant.

The Township's O.P. further notes in policy section 7.8.2 (Water Supply) that the only municipal water supply is located in Millbrook and there exists the Lansdowne Well System along Lansdowne Street West. The Township's O.P. outlines that over the period of its Plan, the use of private wells in Millbrook should cease to exist.

Agriculture-Related O.P. Policies

The Township's O.P. recognizes that the agricultural sector and agricultural lands will continue to play important roles in the Township's economy and quality of the natural landscape. As such, the Township's O.P. takes steps towards preserving prime agricultural lands for future agricultural use and diversifying the uses that can situate on



agricultural lands, provided that uses compromising the viability of farm operations are not permitted. Overall, its policies aim to protect prime agricultural lands, prohibit the fragmentation of agricultural lands, and encourage small scale secondary uses to develop on farm properties to ensure value-added operations and improve the livelihood of area farmers. More specifically, the overall objectives of the Agricultural Areas designation are to recognize that agriculture is the primary activity and land use in these areas, maintain and preserve the agricultural resource base of the Township, and promote the agricultural industry and associated activities and enhance their capacity to contribute to the economy of the Township.

Rural Area O.P. Policies

The Township's O.P. outlines that the Rural Area designation represents lands with soils subject to the Canada Land Inventory of Soil Capability for Agriculture, organic soils, and areas where previous non-farm development and lot creation has effectively limited the future of intensive farm activity (policy section 5.2). The overall objective of the Rural Area designation is to prevent the fragmentation of land suitable for agricultural production by protecting it from scattered development and land uses not related to agriculture, limit non-farm growth in these areas, and encourage rural economic activity provided it does not adversely impact agricultural uses and is compatible with rural residential uses.

Summary

The Township's O.P. is well established to plan and manage growth, promote its Employment Areas, and promote the efficient use and orderly development of its infrastructure. When broadly comparing the Township of Cavan Monaghan's O.P. policies to the Townships with serviced settlement areas (Townships of Asphodel-Norwood, Selwyn, and Havelock-Belmont-Methuen), it was observed that the Township of Cavan Monaghan's Employment Area and economic development-related policies and directions are more focused on a vision. The Township's policies further encourage and recognize the potential of the Township across a range of traditional and emerging sectors. Furthermore, the Township's policy framework clearly differentiates between more urban and rural Employment Areas as well as their uses, which was generally not the case when assessing the O.P. policies of the other Townships. To further the Township's competitive advantage with regards to its O.P. policies, the Township would benefit from further differentiating Employment Area uses through O.P. policy and



detailed Zoning By-Laws using the results of this study, which will be further discussed in Chapter 10. Overall, the Township's policy framework continues to have clear goals and objectives from growth management and housing to employment and economic development. Recommendations and strategic directions on how the Township's O.P. policies overall can be improved given the results of the long-term growth forecast, residential and non-residential supply and demand analysis, and long-term land needs to the year 2041 are provided in Chapter 10.

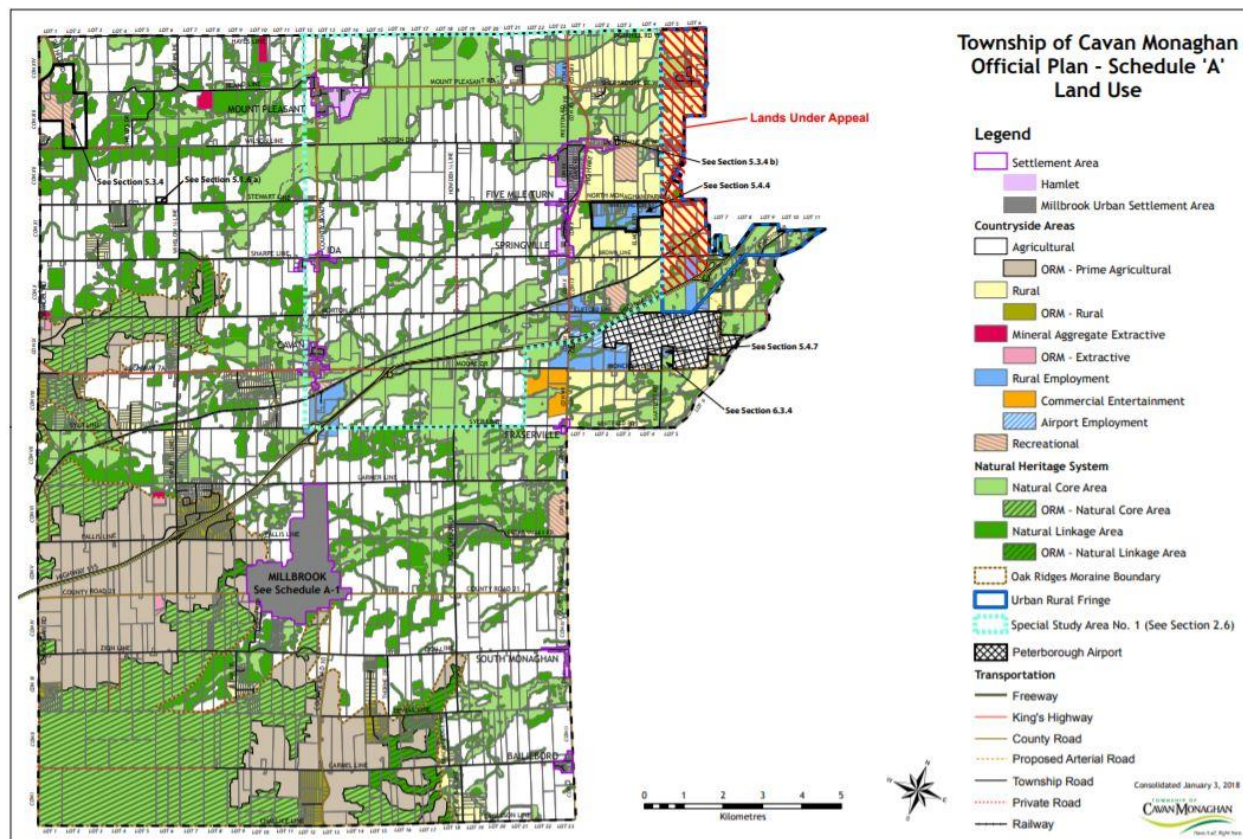
2.4 Township of Cavan Monaghan Community Structure

The Township of Cavan Monaghan is located in central-eastern Ontario within the County of Peterborough. It is connected to Highway 401 by Highway 115 and the recent Highway 407 extension. The Township offers a strategic location, being located less than an hour's drive away from the east Greater Toronto Area (G.T.A.), but also located within proximity to the tourism and economic activity of Peterborough County and the Kawarthas region.¹ Surrounded by a network of natural heritage and hydrological features in the Oak Ridges Moraine (O.R.M.), it is also adjacent to the City of Peterborough to the east and the Region of Durham to the southwest. Figure 2-2 illustrates the Township's overall land-use structure.

¹ Highway 407 extension to Highway 115 was completed in December 2019.



Figure 2-2
Township of Cavan Monaghan
Official Plan Schedule “A” – Land Use



Source: Township of Cavan Monaghan Official Plan (January 2018 Office Consolidation).

Settlement Areas

The Township consists of nine settlement areas along County Road 10 and County Road 28. The settlement areas include one Urban Settlement Area (Millbrook) and eight Hamlets (Ida, Cavan, Mount Pleasant, Five Mile Turn (North Monaghan), Springville, Fraserville, Baileboro, and South Monaghan).

Most of the Township's growth is planned to be directed to the Millbrook Urban Settlement Area, located south of the Highway 115 and County Road 10 interchange (Figure 2-3). As per provincial and County planning policy (refer to sections 1.33 and 1.4), housing intensification and D.G.A. density are to be applied to this area.

Millbrook consists of residential, employment, commercial, institutional, and parks and open space land uses, with most of the land uses designated as residential. Most of the



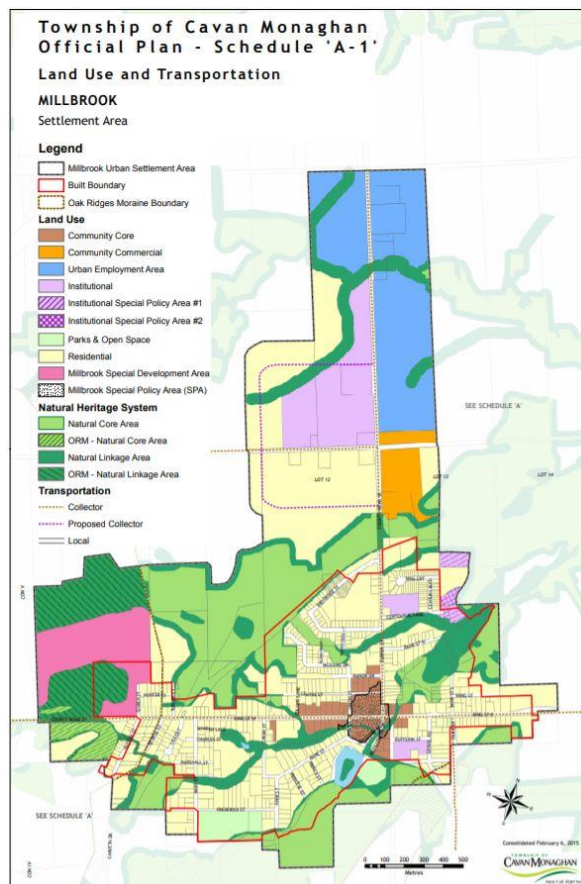
residential development in Millbrook is low-density, however recent development initiatives have introduced medium- to high-density residential development just north of the downtown Millbrook area. The surrounding area at the intersection of King Street West and Tupper Street, designated as the Community Core, is intended to become a focal point for commerce, tourism, and pedestrian-scale activity, in addition to a mix of uses.

Institutional uses also exist in Millbrook, with most of the institutional lands concentrated on the northern tip of Millbrook, adjacent to the Urban Employment Areas, and also dispersed throughout the eastern half of the urban settlement area. Permitted uses on these institutional lands include municipal offices and administration facilities, recreation and open space, public services such as emergency services and public works operations, places of worship, daycare centres, libraries, museums, art galleries, long-term care and assisted living facilities, and cemeteries.

Aside from these commercial and institutional uses, the Township O.P. also contains special policy areas, such as the Millbrook Special Development Area and Millbrook Special Policy Area. The Millbrook Special Development Area applies to the site of the former Millbrook Correctional Facility and is a development opportunity in the Township. The Millbrook Special Policy Area rests on top of most of the Community Core designation described earlier and its purpose is to require all new buildings within this area to be floodproofed to the Regulatory Flood level. Natural core and linkage areas as part of the O.R.M. also form a large component of Millbrook, concentrating in the northwest and northeast quadrants of the urban settlement area.



Figure 2-3
Land Use and Transportation Plan of the Millbrook Urban Settlement Area
in the Township of Cavan Monaghan



Source: Township of Cavan Monaghan Official Plan
(January 2018 Office Consolidation)

Mount Pleasant, Ida, and Cavan Hamlets are located along County Road 10, while the Five Mile Turn, Springville, Frasersville, South Monaghan, and Baileboro Hamlets are located along County Road 28. Limited growth is directed to these areas and is contingent on the ability to provide adequate individual on-site sewage and water services on a sustainable basis. As well, these areas are expected to take on an infilling and minor rounding out approach. The County's and Township's O.P.s encourage growth and development to be directed to the Millbrook Urban Settlement Area.



Transportation and Infrastructure

Throughout the Township, there is a transportation network of local and County roads, Highway 115, and a railway, which provide inter- (e.g. between the G.T.A. and the Township) and intra-municipal (e.g. between Millbrook and the Hamlets, Urban and Rural Employment Areas, etc.) travel. Highway 115 and the railway bisect the Township east-west, with Highway 115 enabling the Township to have greater connections to Highway 401 and the newly established link to Highway 407. Of significant importance to the Township's community structure is the presence of the Peterborough Airport). Its location in the Township and relationship to the surrounding Rural and Airport Employment Areas provide a terminus for economic activity on the railway and Highway 115. The Township's O.P. generally recognizes the importance of ensuring that the network is safe, integrated, and balanced in order to facilitate the movement of people and goods within, to and from the Township.

Urban and Rural Employment Areas

The Township's community structure also consists of Employment Areas in five key locations: (1) the Highway 115 and County Road 10 interchange; (2) the area east of the Five Mile Turn and Springville Hamlets; (3) the area surrounding the Peterborough Airport; (4) the area north of Frasersville and near the existing Commercial Entertainment land-use designation; and (5) the Employment Area at the northern edge of Millbrook. These key locations show the natural draw of economic activity northeast towards the City of Peterborough and southwest towards Durham Region.

Employment Areas within Millbrook are designated as an Urban Employment Area and examples of permitted uses in the Urban Employment Area policies include: manufacturing, assembling, processing, fabricating and warehousing, wholesaling, and distribution facilities; accessory office uses provided they are on the same lot and are related to and ancillary to the main industrial use up to a maximum of 25 percent of the total gross building floor area; and outdoor storage uses that are accessory to a permitted use. Permitted uses also include complementary commercial uses, such as small-scale business and personal services, the serve the primary industrial uses. As will be explained in detail in section 4.2.1, most of the non-residential land supply in the Urban Employment Area is vacant.



The four other key locations of the Township's Employment Areas are designated as Rural Employment. This designation differs from the Urban Employment Area as it relates to the physical characteristics, infrastructure needs, and servicing provisions of employment uses. Permitted uses in the Rural Employment Area include agriculturally related industrial uses, processing and storage of agricultural commodities, light manufacturing, processing of semi-manufactured goods, assembly of manufactured goods, warehousing, wholesale distribution centres, transportation terminals, accessory professional or business offices and research facilities. Commercial uses, such as small-scale restaurants, auto repair, and rental operations and business service and supply operations, which are intended to primarily service Rural Employment Areas, are also permitted to locate in proximity to Rural Employment Areas. As noted in detail in section 4.2.1, there is a large supply of vacant rural employment lands of which most is concentrated around the Peterborough Airport.

The Rural Employment Area consists of three policy designations, which were mentioned in the previous section. The North Monaghan Employment Area is located at Whittington Drive and Elmdale Road, the Airport Employment Area is located on the western edge of the Peterborough Airport and between Clifford Line to the north and Moncrief Line to the south, and the Commercial Entertainment Area is along County Road 28 and less than 500 metres north of Fraserville. Policies of the North Monaghan Employment Area acknowledge that, subject to the Township and City of Peterborough entering into an agreement to extend services to this area, the development of employment uses within this area may occur on the basis of full municipal services provided by the City of Peterborough. The purpose of the Airport Employment Area policies is to outline permitted uses ranging from automotive and aircraft uses, to data processing centres, research and development facilities, and manufacturing, assembling, processing, and warehousing uses. An additional purpose is to ensure the Development Constraints (see Schedule C of the Township's Official Plan) within these designated areas are addressed to the satisfaction of the Township and Conservation Authority. The Development Constraints that exist within these designated areas include a Floodplain Area and Wellhead Protection Area. Finally, the Commercial Entertainment policies permit motels, hotels, meeting facilities, convention facilities, gaming facilities, theatres and entertainment auditoriums, and recreation facilities, and support uses and services such as parking, restaurants, and associated accessory uses. In addition, existing racing facilities for automobile and horse races are recognized as a permitted use, and are permitted to be replaced or expanded subject to



the necessary planning and regulatory approvals. New racing facilities are prohibited in the Commercial Entertainment designation. Each of these Rural Employment Areas demonstrate unique employment sectors that currently exist and are planned for within the Township.

Agricultural Areas

Most of the Township's lands are subject to the Agricultural Areas land-use designation. Permitted uses in the Agricultural Areas include, but are not limited to, small-scale farm-related commercial tourism establishments; farm-related industrial uses that directly service and support the agricultural industry and require locations in close proximity to farming operations; home-based industries; and an accessory residential dwelling for full-time farm help.

Rural Areas

The Rural Areas of the Township are in the northeastern quadrant of the Township, abutting the municipal boundary that it shares with the City of Peterborough. Permitted uses in the Rural Areas include single-dwelling houses on existing lots of record or lots created by a consent to a land severance provided they are compatible with adjacent land uses; home-based businesses in residences and accessory buildings; small-scale commercial and industrial uses that service the Countryside Areas (i.e. the Rural Employment Areas); hiking and cross-country ski trails that require a large land area; bed and breakfast establishments and similar, small-scale accommodation that caters to tourists and travellers; and forestry, reforestation, and conservation. The Rural Areas also include some existing rural residential areas not located in Hamlets or Millbrook.

Summary

The Township's community structure emphasizes that the protection and preservation of the Township's valuable natural heritage, agriculture, and rural assets is of the utmost importance. This is done through purposefully focusing on two areas of the Township to direct growth, economic activity, services, and/or amenities: Millbrook and the most northeastern quadrant of the Township around the Peterborough Airport. This focus enables the Township to plan and manage growth, support economic development, use its transportation network efficiently and strategically, and plan for the orderly development and efficient use of municipal services.



Chapter 3

Macro-Economic and Demographic Trends



3. Macro-Economic and Demographic Trends

The following chapter provides a summary of the macro-economic trends influencing regional labour force and employment trends within Ontario, Peterborough County and the Township of Cavan Monaghan over the past two decades.

3.1 Ontario Economic Outlook within the Canadian Context

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by Gross Domestic Product (G.D.P.) output, has shifted from the goods-producing sector (i.e. manufacturing and primary resources) to the services-producing sector. This has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn but have more recently stabilized.

Over the past decade, the Ontario economy has experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery was relatively slow to materialize. That said, provincial G.D.P. levels have sharply rebounded since 2013, as illustrated in Figure 3-1. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar and the gradual strengthening of the U.S. economy.¹ Provincial G.D.P. growth is anticipated to ease from just over 2.2% in 2018 to approximately 1.7% by 2020, largely as a result of a tightening labour market and slowing global economic growth.²

While the recent performance of the Ontario economy has remained relatively strong over the past several years through to early 2020, there are now significant risks to the national and provincial economies that are important to recognize. The December 2019 outbreak of coronavirus disease (COVID-19) in Wuhan, China was officially declared a global pandemic by the World Health Organization (W.H.O.) on March 12, 2020. At the current time, the level of sustained economic impact related to this “exogenous shock” to the world economy, Canada, Ontario and more regionally is unknown. As disruption related to COVID-19 persists and intensifies at an international scale, however, the risks of a global recession in 2020 and potentially beyond, have increased substantially.

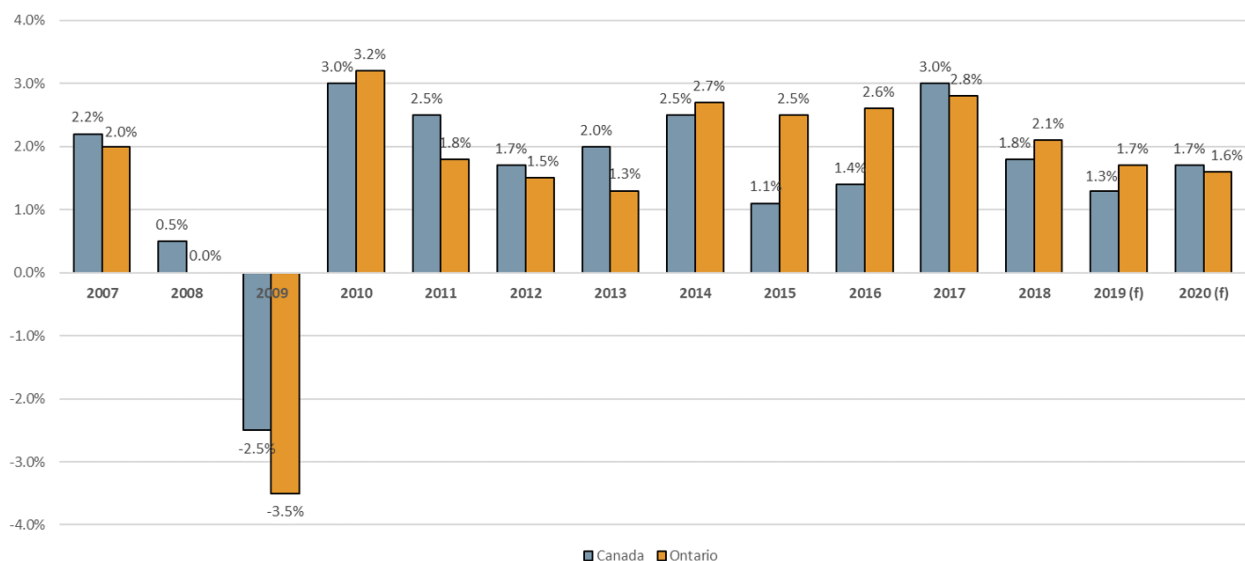
¹ Valued at approximately \$0.71 U.S. as of April, 2020.

² BMO Provincial Outlook, Spring 2019.



Domestically, the Ontario housing market also continues to pose a risk to the overall economy. The sharp rise in Ontario's housing prices – particularly in the G.T.A. – has contributed to record consumer debt loads and eroded housing affordability. The impacts of COVID-19 on the regional and local housing market are largely unknown at the current time. It is assumed that near-term housing demand will likely be negatively impacted at the broader regional level (i.e. G.G.H.) in 2020 and potentially 2021, resulting from a weakened labour market, reduced consumer spending, potential increases in mortgage defaults and delinquent rent payments, as well as lower immigration levels. Over the long term, the outlook for the G.G.H. housing market remains positive, which is important to recognize given the focus of this study on urban land needs and economic expansion potential in the Township of Cavan Monaghan over a 20-year planning horizon.

Figure 3-1
Province of Ontario and Canada
Annual Real G.D.P. Growth, Historical (2006 to 2018) and Forecast (2019 to 2020)



Source: Derived from B.M.O. Capital Markets Economics, Provincial Economic Outlook, March 2019 by Watson & Associates Economists Ltd.

Note: 2019 and 2020 are forecast by B.M.O. Capital Markets Economists

3.2 Regional Economic Trends

This section examines labour force trends over the past 15 years in the Township of Cavan Monaghan in relation to Peterborough County and the Province of Ontario.



These trends are important to understand given the close relationship between regional labour force growth, net migration and population growth.

3.2.1 Outward Growth Pressure

Cavan Monaghan is located in the northeast of one of the fastest growing Cities/Regions in North America, known as the G.G.H. This region comprises the municipalities that make up the Greater Toronto Hamilton Area (G.T.H.A.), as well as the surrounding Regions/Counties within Central Ontario, known as the G.G.H. “Outer Ring,” which extends from Haldimand County in the southwest to Simcoe County in the north, to Peterborough County in the northeast (refer to Map 3-1). The strength of the broader regional G.G.H. economy, in particular the G.G.H. Outer Ring, presents an opportunity for the Township of Cavan Monaghan economy and its residents within commuting distance to this growing regional employment market.

As identified in the Growth Plan, 2019, the long-term outlook for the G.G.H. is positive, characterized by strong population growth primarily through migration, fueled by economic growth that is increasingly concentrated in large urban centres.

The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 13.5 million in 2041. This represents a population increase of 4 million people (160,000 annually), or 1.4% annually between 2016 and 2041. With respect to the region’s economic potential, the G.G.H. employment base is forecast to increase from 4.6 million in 2016 to 6.3 million in 2041. This represents an employment increase of 1.7 million jobs (68,000 annually), or 1.2% annually between 2016 and 2041. The G.G.H. represents the fourth largest and one of the fastest growing City/Regions in North America.

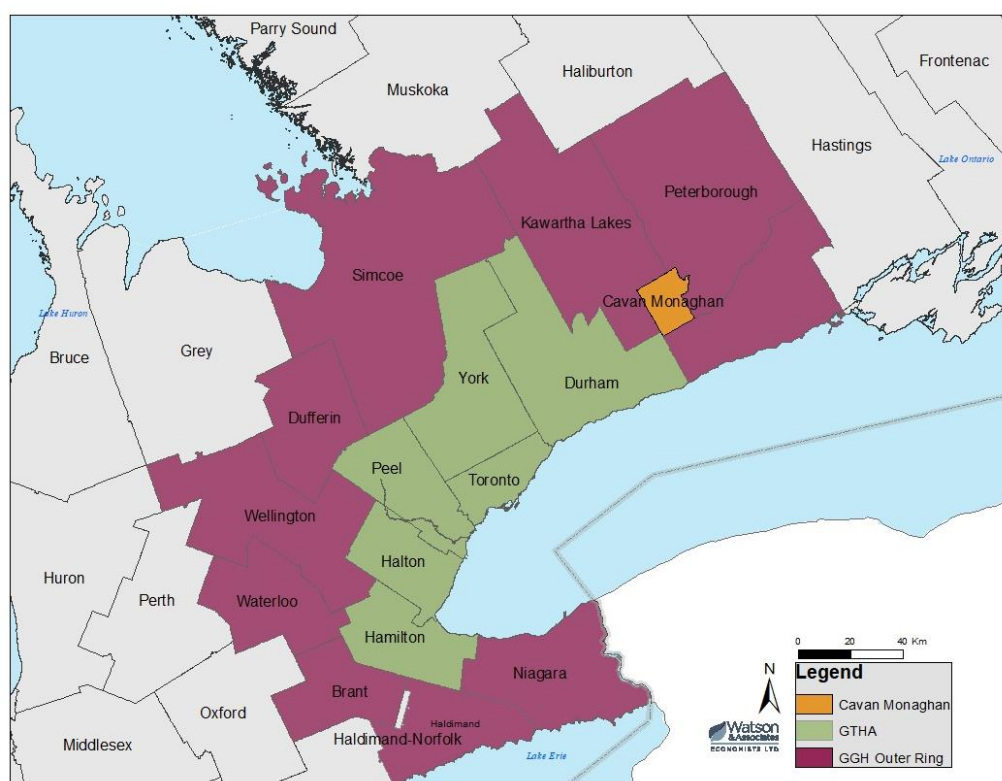
The G.G.H. represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The G.G.H. industrial and office commercial real estate



markets within this region are significant, having the third and sixth largest inventories, respectively, in North America.¹

With a robust economy and diverse mix of export-based employment sectors, the G.G.H. is highly attractive on an international level to new businesses and investors. The G.G.H. also has a strong appeal given the area's regional infrastructure (i.e. Toronto Pearson International Airport (T.P.I.A.), other regional airports, provincial highways, inter-modal facilities), access to labour force, post-secondary institutions and proximity to the U.S. border. In turn, this continues to support steady population and housing growth within this region, largely driven by international and inter-provincial net migration to this region.

Map 3-1
Township of Cavan Monaghan within the Context of the G.G.H.



¹ Source: Derived from Cushman & Wakefield Toronto Industrial Market Beat and U.S. Industrial Market Beat Snapshot, Q3 2017 and Cushman & Wakefield Toronto Office Market Beat and U.S. Office Market Beat Snapshot, Q3 2017 by Watson & Associates Economists Ltd.



Figure 3-2 through Figure 3-4 summarize the long-term population employment growth forecast for the G.G.H. between the G.T.A. and the G.G.H. Outer Ring. Figure 3-2 identifies that the G.T.A. has historically experienced a higher rate of population and employment relative to the G.G.H. over the 2001 to 2016 period. Looking forward, the forecast annual population and employment growth rate of the G.G.H. Outer Ring is anticipated to increase significantly, driven by continued outward growth pressure from the G.T.A. In fact, the forecast annual rate of employment growth in the G.G.H. Outer Ring is expected to exceed that of the G.T.A. between 2016 and 2041.

Figure 3-2
Historical and Forecast Population Growth for the Greater Golden Horseshoe (G.G.H.), 2001 to 2041

Area	Population			2001-2016		2016-2041	
	2001	2016	2041	Total Population Growth	Annual Population Growth Rate	Total Population Growth	Annual Population Growth Rate
G.T.H.A.	5,808,000	7,183,000	10,130,000	1,375,000	1.4%	2,947,000	1.4%
G.G.H. Outer Ring	2,046,000	2,355,000	3,350,000	309,000	0.9%	995,000	1.4%
Total	7,854,000	9,538,000	13,480,000	1,684,000	1.3%	3,942,000	1.4%

Source: 2001 to 2016 derived from Statistics Canada Census, 2001 and 2016. 2016 to 2041 derived from Growth Plan for the Greater Golden Horseshoe, 2019, by Watson & Associates Economists Ltd., 2019.

Note: Population includes the net Census undercount.

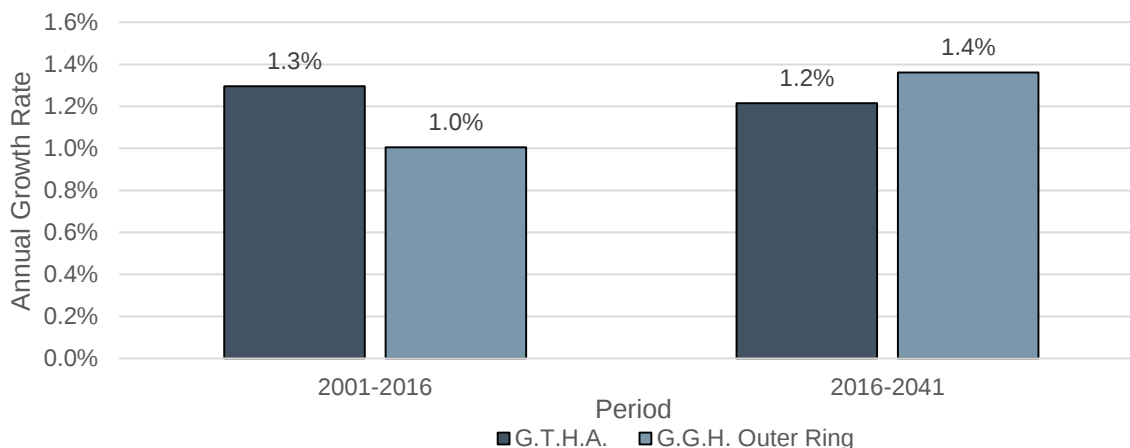
Figure 3-3
Historical and Forecast Employment Growth for the Greater Golden Horseshoe (G.G.H.), 2001 to 2041

Area	Total Employment			2001-2016		2016-2041	
	2001	2016	2041	Total Employment Growth	Annual Employment Growth Rate	Total Employment Growth	Annual Employment Growth Rate
G.T.H.A.	2,938,000	3,564,000	4,820,000	626,000	1.3%	1,256,000	1.2%
G.G.H. Outer Ring	890,000	1,034,000	1,450,000	144,000	1.0%	416,000	1.4%
Total	3,828,000	4,598,000	6,270,000	770,000	1.2%	1,672,000	1.2%

Source: 2001 to 2016 derived from Statistics Canada Census, 2001 and 2016. 2016 to 2041 derived from the Growth Plan for the Greater Golden Horseshoe, 2019, by Watson & Associates Economists Ltd., 2019.



Figure 3-4
Historical and Forecast Annual Employment Growth Rate for the Greater Golden Horseshoe (G.G.H.), 2001 to 2041



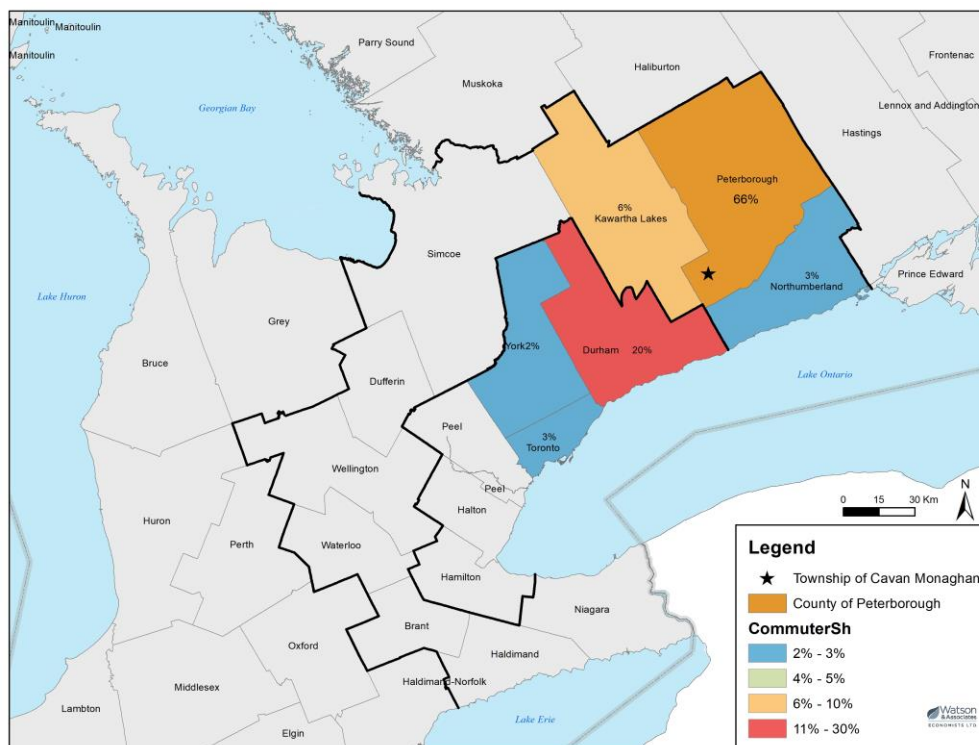
Source: 2001 to 2016 derived from Statistics Canada Census, 2001 and 2016. 2016 to 2041 derived from the Growth Plan for the Greater Golden Horseshoe, 2019, by Watson & Associates Economists Ltd., 2019.

The strength of the broader regional G.G.H. economy, in particular the G.G.H. Outer Ring, presents a significant opportunity for the Peterborough County economy and its residents within commuting distance to this growing regional employment market.

As displayed in Map 3-2, 66% of Cavan Monaghan residents work within Peterborough County, while the rest commute outside the County for work. Durham Region represents the largest employment hub outside of Peterborough County, as it employs 20% of Cavan Monaghan residents. According to the 2019 Growth Plan, the Cavan Monaghan commuter-shed is expected to grow by approximately 377,100 jobs between 2016 to 2041. As this surrounding commuter-shed grows, Cavan Monaghan will continue to be a desirable location for these workers to live, leading to steady population growth in the Township.



Map 3-2
Township of Cavan Monaghan Commuter-Shed, 2016



3.2.2 Regional Labour Force Trends of Peterborough County, 2001 to 2016

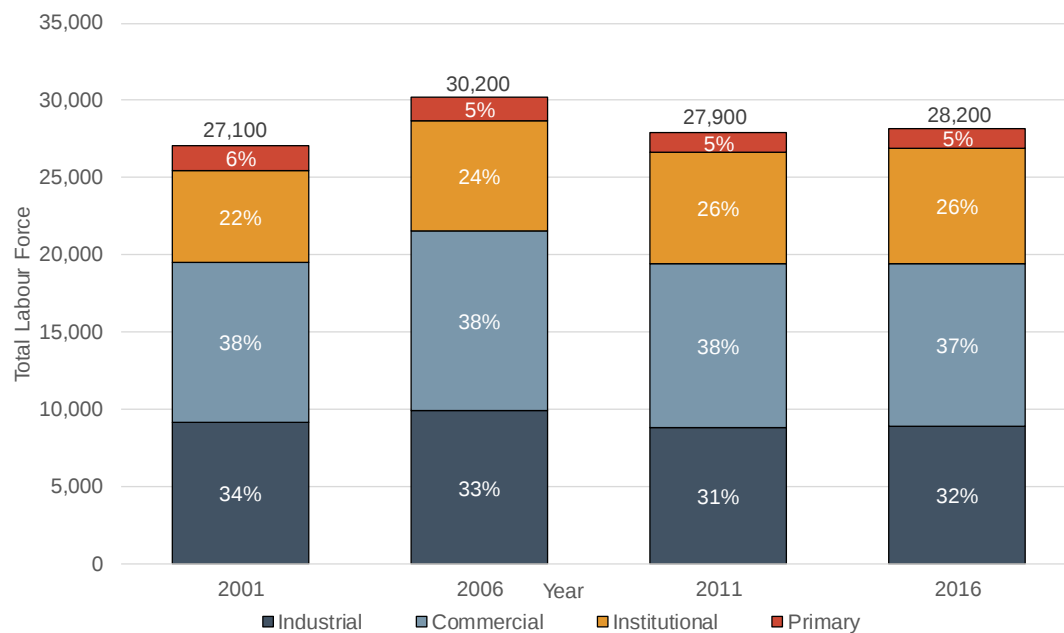
Forecast population growth potential within Peterborough County is directly tied to the economic outlook and competitive position of Ontario and beyond. Regional economic conditions within the Province also impact the share of labour force growth and net-migration by sub-region (e.g. eastern Ontario, central Ontario, northern Ontario). Attracting this provincial migration will drive labour force and population growth in Peterborough County and the Township of Cavan Monaghan.

Figure 3-5 summarizes historical labour force trends within Peterborough County over the 2001 to 2016 period. The total labour force represents the number of people in the labour force (both employed and unemployed) who live within the County (excluding the City of Peterborough) and are in the labour force, regardless of where they work. This includes residents who live and work within Peterborough County, including those who work from home and those who commute outside the County for work. Key observations include:



- During the 2001 to 2016 period, the total labour force base in Peterborough County increased by 1,100 and at a moderate rate of 0.3% per year; and
- Over the 15-year period, the share of labour force within Peterborough County gradually shifted away from commercial, industrial and primary sectors towards the institutional sector.

Figure 3-5
Peterborough County
Total Labour Force by Major Sector, 2001 to 2016



Source: Data derived from Statistics Canada Census Profiles, 2001 to 2016 by Watson & Associates Economists Ltd., 2019.

Change in Total Labour Force		
2001 to 2006	2006 to 2011	2011 to 2016
3,100	-2,300	300

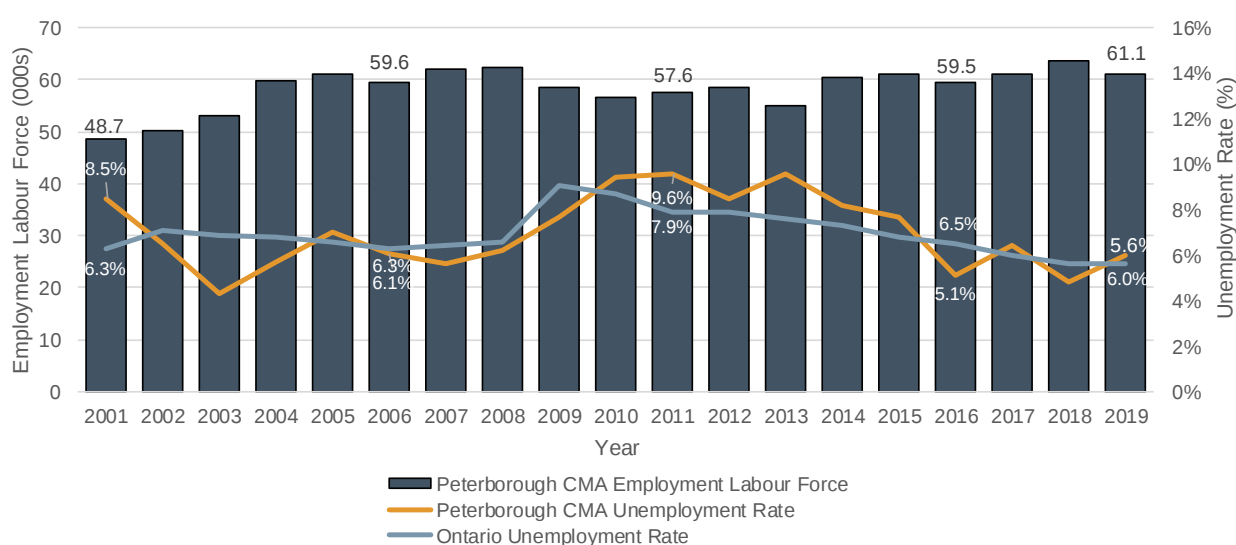
Figure 3-6 illustrates total employed labour force and unemployment rate trends for the Peterborough Census Metropolitan Area (C.M.A.) economic region. Labour force data is not available for Peterborough County post-2016, but it is largely captured in the Peterborough C.M.A. which includes the southern portion of Peterborough County, including the City of Peterborough. Key observations include:

- Similar to the Province of Ontario as whole, the Peterborough C.M.A. economy was hit relatively hard by the 2008/2009 global financial crisis;



- Between 2008 to 2013, the total employed labour force within the Peterborough C.M.A. declined steadily from 625,000 to 549,000;
- In contrast, during the post-2013 period the labour force market has shown relatively strong growth, increasing from 549,000 in 2013 to 611,000 in 2019, an increase of 62,000 or 1.8% annually; and
- The unemployment rate in the Peterborough C.M.A. peaked at 9.6% in 2011 and has since fallen to an historical low of 6.0% in 2019.

Figure 3-6
Peterborough C.M.A. Labour Force Trends, 2001 to 2019



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
Source: Peterborough CMA employed labour force from Statistics Canada Table 14-10-0098-01 and unemployment rate from Table 14-10-0096-01.
Province of Ontario unemployment rate from Statistics Canada Table 14-10-0090-01. By Watson & Associates Economists Ltd., 2020.

3.2.3 Township of Cavan Monaghan Economic Trends

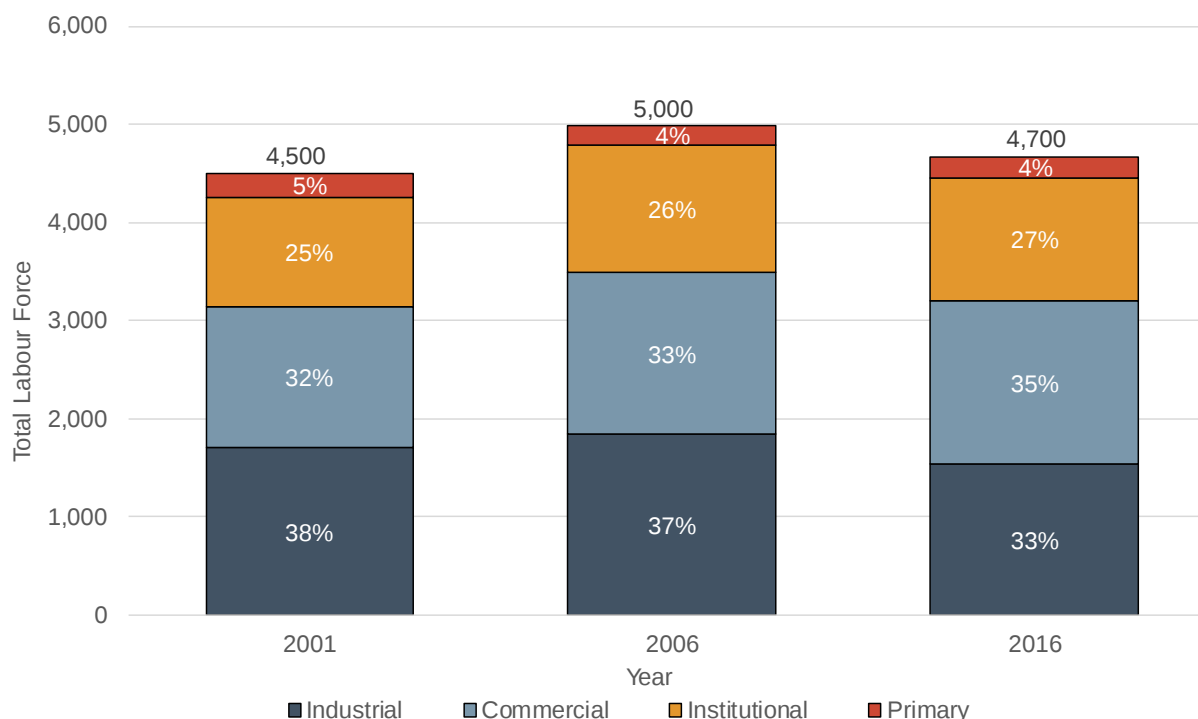
3.2.3.1 Local Labour Force Trends of the Township of Cavan Monaghan, 2001 to 2016

Figure 3-7 summarizes historical labour force trends within the Township of Cavan Monaghan over the 2001 to 2016 period. The following trends can be observed:

- The total labour force base in the Township of Cavan Monaghan increased at a rate of 0.3% annually during the 2001 to 2016 period; and
- The share of labour force decreased in both the primary and industrial sectors.



Figure 3-7
Township of Cavan Monaghan
Total Labour Force by Major Sector, 2001 to 2016



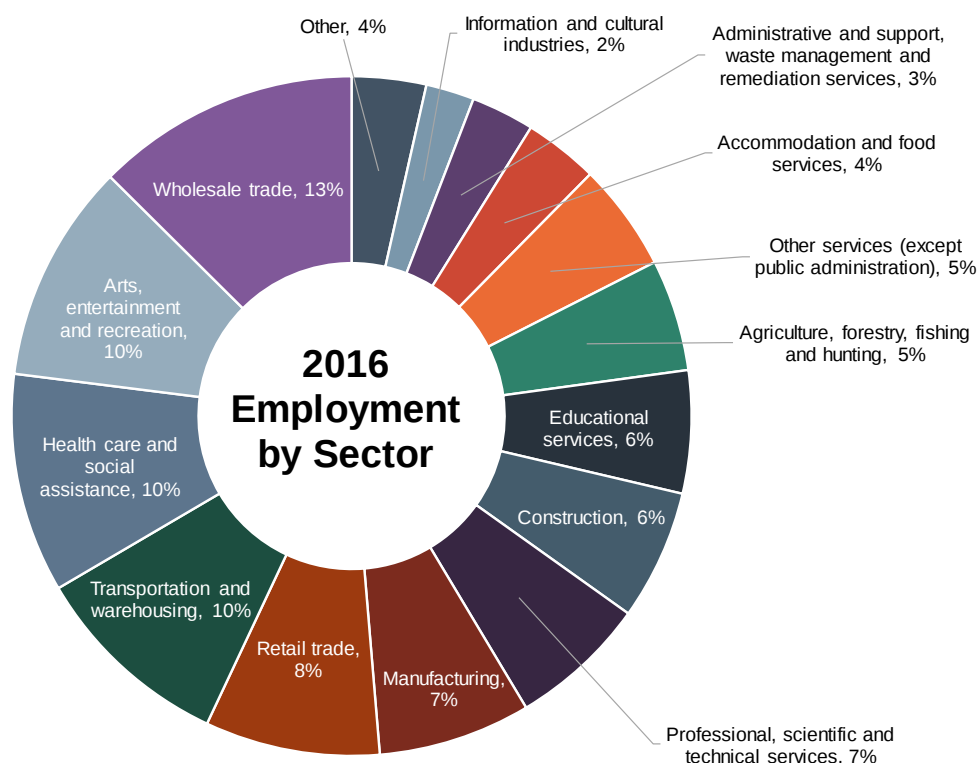
Source: Data derived from Statistics Canada Census Profiles, 2001 to 2016 by Watson & Associates Economists Ltd., 2019.

3.2.3.2 Township of Cavan Monaghan Employment by Place of Work and Sector

Figure 3-8 summarizes the Township's employment base by sector for 2016. Employment represents the number of jobs located within the Township of Cavan Monaghan. This includes the live/work labour force, including work at home employees, as well as in-commuters. While the Township's economic base is relatively small, it is diverse, spanning a range of employment sectors from professional, scientific, and technical services to transportation and warehousing. The largest sector in the Township is wholesale trade, accounting for 13% of the total employment base.



Figure 3-8
Township of Cavan Monaghan
Employment Base by Sector, 2016



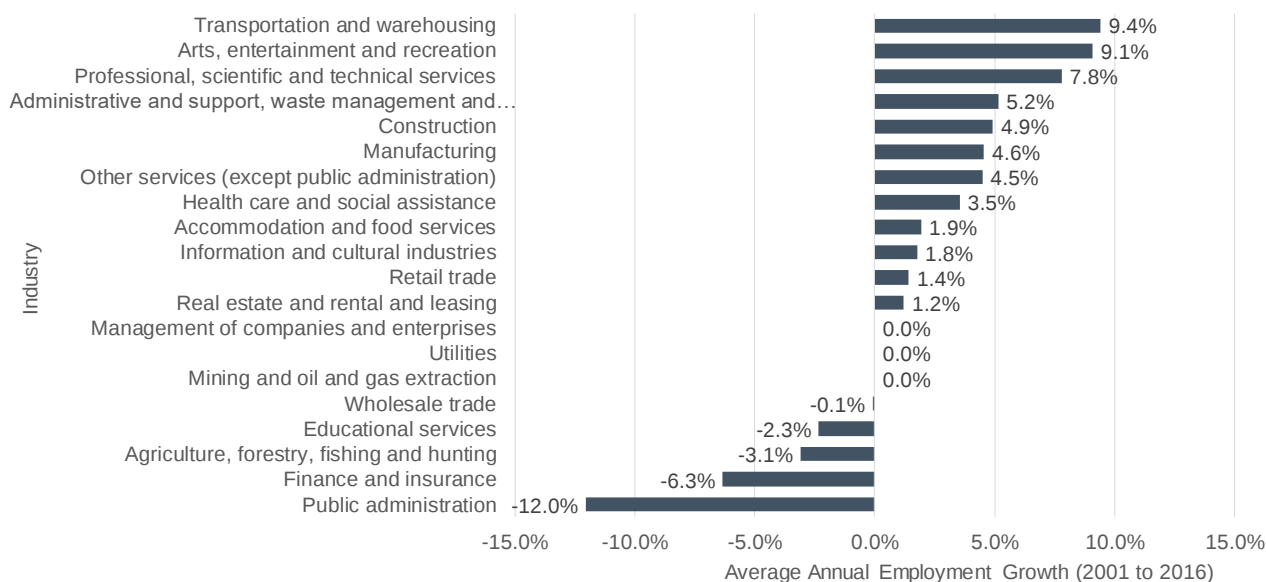
Source: Derived from custom order Statistics Canada 2016 Place of Work data by Watson & Associates Economists Ltd., 2019.

Note: Employment figures include work at home and exclude no fixed place of work.

Figure 3-9 summarizes employment change by industry sector over the 2001 to 2016 period in the Township. Total employment in the Township has increased from 2,700 in 2001 to 3,400 in 2016. Throughout this period, the sectors displaying the strongest levels of growth include transportation and warehousing; arts, entertainment and recreation; professional, scientific and technical services; administrative and support, waste management and technical services; construction; and manufacturing. In contrast, employment in the public administration and finance and insurance sectors decreased by approximately 12% and 6%, respectively.



Figure 3-9
Township of Cavan Monaghan
Average Annual Employment Growth by Sector, 2001 to 2016



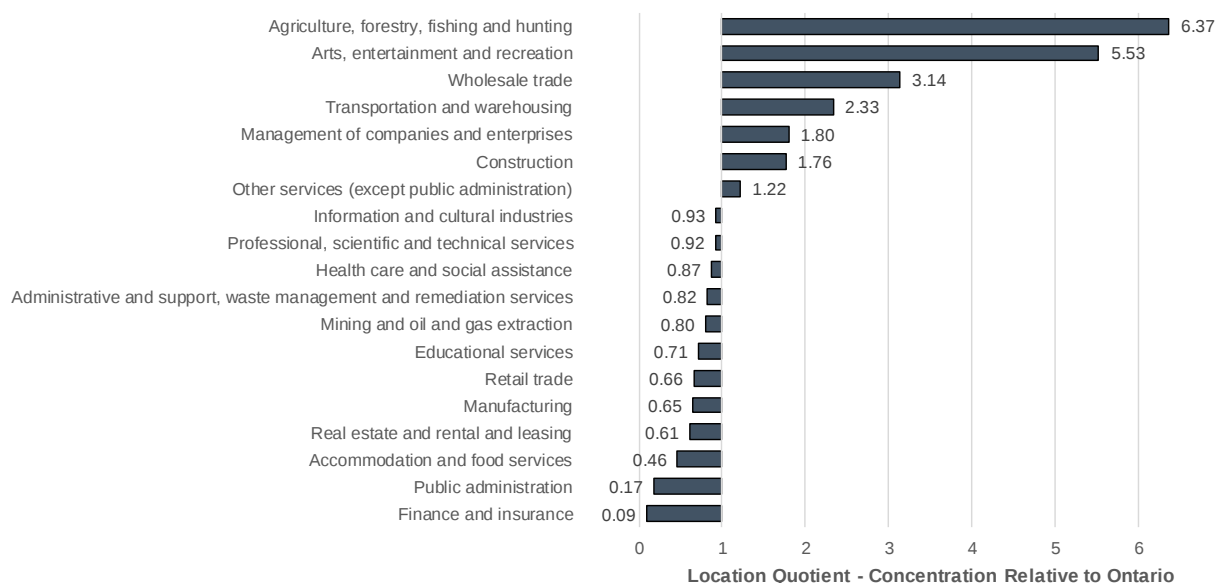
Source: Statistics Canada 2001 and 2016 place of work data, by Watson & Associates Economists Ltd., 2019.

Figure 3-10 illustrates the strength of employment sectors in the Township relative to the Province of Ontario using location quotients (L.Q.).¹ As shown, the Township's economy is largely oriented towards agriculture, forestry, fishing and hunting; arts, entertainment and recreation; wholesale trade; transportation and warehousing; management of companies and enterprises; and construction. The Township has a relatively lower concentration of employment in all other sectors compared to the provincial average, most notably in finance and insurance, and public administration.

¹ An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 identifies that the concentration of employment in each employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or "cluster."



Figure 3-10
The Township of Cavan Monaghan
Location Quotient Relative to Ontario, 2016



Source: Derived from Statistics Canada Place of Work data by Watson & Associates Economists Ltd., 2019.

3.3 Local Drivers and Disruptors of Future Growth in the Township of Cavan Monaghan

In addition to the broad macro-economic drivers previously discussed in this section, there are a number of local drivers and disruptors that are anticipated to influence future population and employment growth within the Township of Cavan Monaghan. These factors are critical in informing the Township's local employment growth potential, particularly in export-based sectors, which are not as closely tied to local population growth.

3.3.1 Millbrook Urban Settlement Area

The Millbrook Urban Settlement Area represents a focal point for economic development within the Township. The presence of supporting business services and related industries, availability of full municipal services, connectivity to Highway 115, and a growing population and labour force offer a range of economic opportunities within this area. The completion of the Highway 407 extension to Highway 115 is anticipated to generate increased outward growth pressure from G.T.A. residents



choosing to relocate to the Township while still maintaining a relatively reasonable commute to work.

The Urban Employment Areas to the north of Millbrook provide an opportunity to attract a range of light and general industrial uses looking to locate in more prestige employment and urban business park environments, provided that full municipal services are planned for and staged in the short to medium term. These environments are different from those offered in more rural settings (i.e. Rural Employment Areas in the Township), as they potentially offer higher urban design standards, live-work opportunities, employment-supportive uses and other amenities due to their proximity to residential, institutional, and commercial uses.

3.3.2 Rural and Agricultural Areas of the Township

It is anticipated that the Township's Rural Areas and, more specifically, its Rural Employment Areas will continue to act as major drivers of local employment growth and economic development across a broad range of sectors such as manufacturing, transportation, logistics, food processing, agriculture, agribusiness, aerospace, general aviation and training, recreation and tourism, clean technology and business services. This is primarily due to the presence of Highway 115, the CP railway, the Peterborough Airport, access to a number of post-secondary institutions within the surrounding area, in addition to the Township's proximity to the City of Peterborough and its industrial uses.

It is recognized that the Peterborough Airport serves as a key driver to many of the surrounding businesses and overall economic activity of the region. Its presence has led to the establishment of general aviation and related industries, and has attracted financial investments for infrastructure and job training from various levels of government. It is anticipated that it will continue to positively impact the employment growth potential of the Township.

3.3.3 Tourism

Tourism continues to be a key sector in the Peterborough and Kawarthas region and is anticipated to be a driver of future growth in Cavan Monaghan. 2016 Regional Tourism



Profile data¹ collected by the Ministry of Heritage, Sport, Tourism, and Culture Industries shows that Cavan Monaghan is part of Ontario Tourism Region 8 (Kawarthas and Northumberland). Although boundaries of the Province's tourism regions are large, making it difficult to capture more localized tourism-related data, the data trends provide some indication of how the Township's tourism sector is anticipated to continue to drive growth. For example, approximately 90% of visitor trips to this tourism region are for pleasure and to visit family and friends and a little over half of the visitors are same-day visits. This suggests the Township is benefitting from its proximity to the G.T.A. and has opportunities to further attract new visitors in the long-term through day-long tourism activities. Furthermore, in terms of visitor spending, approximately 46% is on food and beverage. The presence of a cluster of post-secondary institutions (e.g. Fleming College, Seneca College, and Trent University) and their offerings of Tourism, Marketing, and Business programs are also indicators of the potential of the tourism sector to drive growth. The Township benefits from the attraction towards the agricultural and rural landscapes of the region and the Peterborough and the Kawarthas Economic Development Corporation continues to recognize tourism as a driver of new investment in the region.² It also benefits from the presence of the Shoreline Slots at Kawartha Downs, located approximately 1 km south of the Highway 115 and County Road 28 interchange which have been significant attractors of tourism and entertainment-related activities, but employment growth as well. This has led to economic development goals and objectives to highlight the region's rural and urban assets and businesses, and work with local governments to facilitate tourism-related initiatives on farm-lands.

3.3.4 The Impact of an Aging Township Population

It is important to recognize that the population base of the Township is older on average, and aging at a slightly faster rate than the Province as a whole. This is a key

¹ Consists of data on visitors, visitor spending, accommodations, and tourism-related business establishments.

² For example, the WuTai Shan Buddhist Garden was established in the northwest part of the Township and spans approximately 500 acres. Developed by the Buddhist Association of Canada, it has attracted hundreds of visitors since its open house in summer 2018 for the purposes of meditation and ceremonial activities. It is understood that there are plans to build three additional temples across approximately 1,700 acres of land, further supporting the recreation and tourism activities of the Township and Peterborough and Kawartha Lakes region in the long term.



observation that is discussed in Chapter 5. More specifically, the percentage of the Township's population in the 75+ age group (older seniors) is forecast to almost triple over the forecast period from 7% in 2016 to 20% in 2041.

The aging of the population and declining population growth resulting from natural increase (i.e. births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within the Township, and subsequently the regional labour force participation rate. Similar to the Province as a whole, the Township will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions. It is important to recognize these demographic trends, as they are anticipated to constrain the rate of population and economic growth expected across the Township over the next several decades.

It is also important to recognize that forecast population growth rates are not anticipated to be homogenous across the Township's urban and rural areas. Throughout the Township's rural areas, population growth is anticipated to be slow, and in some cases negative, over the next several decades in areas that are experiencing limited new housing development. In certain cases, the aging population base is also anticipated to place increasing development pressures on the Millbrook Urban Settlement Area. For example, the aging of the Township's population is anticipated to drive the need for seniors' housing and other housing forms geared to older adults (e.g. assisted living, affordable housing, adult lifestyle housing) that are not available, or cannot be provided for, in the Township's other Hamlets and the surrounding rural area.

Given the diversity of the 55-74 and 75+ population age groups, forecast housing demand across the Township between these demographic groups is anticipated to vary considerably. Housing demand within the 55-74 age group is anticipated to be relatively strong for ground-oriented housing forms (i.e. single detached, semi-detached and townhouses) provided in locations that offer proximity to urban amenities, municipal services, and community infrastructure. With respect to the 75+ age group, the physical and socio-economic characteristics of this age group (on average) are considerably different from those of younger seniors, empty-nesters, and working adults with respect to income, mobility, and health. Typically, these characteristics represent a key driver behind the increased propensity of the 75+ population age group for medium- and high-density housing forms (including seniors' housing) that are in proximity to municipal and



community services (e.g. health care services) as well as other community facilities that typically attract this age group.

3.3.5 Assessing the Impacts of Technology and Innovation on Economic Development and Population Growth

Long-term labour force growth potential across the national, provincial, regional and local levels, will be directly influenced by continued structural changes and disruptions driven by technology and automation. According to the Brookfield Institute for Innovation + Entrepreneurship, over the next 10 to 20 years, 42% of the Canadian labour force is at high risk of being affected by automation, either through significant task restructuring or elimination. Jobs that are anticipated to be most highly impacted by automation are primarily within occupations that are administrative, routine, or oriented towards sales and service. The Brookfield Institute report also notes that highly skilled occupations are expected to grow much more quickly than the rest of the labour force and are at a lower risk of being negatively affected by automation. This suggests that more highly skilled labour will be a significant driver of Canada's future economic growth.

Considerable research has recently been undertaken by institutions and consulting agencies to assess the potential impacts of artificial intelligence (A.I.) to businesses as well as its broader impacts to the global economy. A report prepared by PricewaterhouseCoopers in 2017 identifies that the net impacts to global G.D.P. resulting from A.I. are anticipated to contribute up to \$15.7 trillion to the global economy in 2030, more than the current output of China and India combined. The report also identifies that over the next decade, A.I. will generate massive disruption as both established businesses and new entrants drive innovation and develop new business models.

To prevent an undesirable lose-lose scenario associated with anticipated technological change in the economy – talent shortages, unemployment and growing inequality – a number of critical actions are needed. This includes businesses assuming an active role in supporting their existing workforce through reskilling and upskilling, individuals taking a proactive approach to their own lifelong learning, and governments creating an enabling environment to assist in these efforts.

While the long-term net economic impacts of automation and/or A.I. appear to be positive, global competition from both established and emerging markets looking to



capitalize on potential opportunities related to this technology will be increasingly fierce. The Township can influence its readiness towards an ever-evolving knowledge-based economy through on-going leadership and investment by building on its broader regional institutional foundations (e.g. cluster of post-secondary institutions), community assets, and quality of life; developing land-use planning policies that consider the changing nature of employment; and targeting sectors comprising the knowledge-based economy through economic development initiatives. Ultimately, these efforts are important to enhance youth in-migration, talent attraction, and local employment opportunities geared towards an increasingly skilled labour force.

3.3.6 Quality of Life

Quality of life is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in relocation decisions. Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences. Quality of life is also becoming an increasingly important attribute, particularly within the knowledge-based sectors, with workers increasingly determining their place of residency based on quality of life attributes, and employers attracted to locate to these communities based on the labour force pool.

3.4 Competitiveness Analysis

Market competitiveness is typically driven by a broad range of factors that can strongly influence business location decisions, both for new development and expansion. These factors include access to transportation infrastructure, access to labour and employment markets, supply and market choice of land development opportunities, cost structure of the business environment, and quality of life aspects.

With the economic shift to a more knowledge-based economy, the changing competitive landscape has been particularly challenging for Ontario's small to mid-sized municipalities, especially as it relates to being competitive with respect to labour force attributes and access to infrastructure (e.g. high-speed internet, transportation networks).



The economic development prospects of Cavan Monaghan are in many ways tied to the success of the broader regional market. The Township shares the relative strengths of the broader Highway 115 corridor market in terms of investment attraction, and competitive property taxes and development costs. The Township's location along a major transportation corridor – Highway 115 – allows for the movement of goods and the workforce. This, along with its recent connection to Highway 407 and proximity to the G.T.H.A., provides an important competitive advantage for industrial development. The degree to which Cavan Monaghan can capitalize on its regional location advantages will depend largely on the competitiveness of its employment (industrial) lands.

Three comparator municipalities were reviewed in order to provide Cavan Monaghan with a benchmark for planning and developing its Employment Areas. These comparator municipalities and their key Employment Areas include:

- City of Peterborough – Major Bennett Industrial Park and Peterborough East Industrial Park;
- Municipality of Clarington – Orono Employment Area; and
- Township of Scugog – Port Perry Employment Area.

These three comparator municipalities were selected for the following reasons:

- They share the same regional market area as the Township and are considered key competitors;
- Their land-use form and employment land-use designations and permitted uses were generally similar to the Township's Employment Areas (e.g. many of their Employment Areas were in proximity to residential uses and downtown areas, and were surrounded by environmental constraints);
- Their Employment Areas are accessible to Highway 115 and other 400-series highways such as Highway 407;
- They have similar municipal economic profiles and uses accommodated within Employment Areas (e.g. agri-business, manufacturing, transportation and warehousing, etc.); and
- The vision for their Employment Areas is generally aligned with what the Township is seeking to achieve with its Employment Areas (e.g. knowledge-based sectors, professional services, research and development, etc.).



The following physical and economic attributes were reviewed for each of the comparator municipalities and their respective Employment Areas:

Physical Attributes

- Land assembly characteristics (e.g. clustered, fragmented, etc.);
- Transportation and infrastructure (e.g. access to major highways and to goods movement infrastructure such as railway, airport, etc.);
- Presence of a supportive business environment and amenities; and
- Land supply (area of designated and vacant Employment Areas, in addition to range of parcel sizes of vacant Employment Areas).

Economic Attributes

- Costs of serviced, vacant general industrial Employment Areas (average dollars per acre);
- Development charge rates for industrial development (per sq.ft.); and
- Industrial tax rates.

3.4.1 Physical Attributes of Comparator Municipalities

Figure 3-11 summarizes the review that was undertaken to compare land assembly characteristics, transportation and infrastructure access, and presence of a supportive business environment for each of the three comparator Employment Areas.

Although it will be discussed in greater detail in Chapter 10, this review provides the following key considerations for Cavan Monaghan in planning for its Employment Areas:

- Ensure there is a large assembly of Employment Areas that are well-contained, buffered from sensitive land uses, and protected from fragmentation in the long term;
- A wide range of parcel sizes of vacant Employment Areas can improve the developable potential and marketability of Employment Areas. It can help attract different employment sectors and of varying business sizes; and
- Appropriately broadening the permitted uses of Employment Areas to include compatible and/or supportive non-industrial uses has the potential to improve the business environment around Employment Areas. It also has the potential to attract knowledge-based sectors and a labour force.



Figure 3-11
Review of Physical Attributes of the Employment Areas of Comparator Municipalities

Employment Area	Land Assembly Characteristics (e.g. clustered, fragmented, etc.)	Transportation and Infrastructure (e.g. access to Highway 400-series and to goods movement infrastructure (e.g. railway, airport, etc.))	Presence of Supportive Businesses and Amenities
Major Bennett Industrial Park and Peterborough East Industrial Park (City of Peterborough)	✓ Overall configuration of Employment Area is good - parcels are clustered at the southeastern tip of the City and are well-contained. The Employment Area also has a range of parcel sizes (e.g. 1 ha to 10 ha). ✓ Buffered from sensitive land uses, particularly residential uses.	✓ Adjacent to the Highway 115 and Airport Road interchange, which is the same interchange to access Peterborough Airport from the highway. ✓ Adjacent to the railway and has access to the County Road network. ✓ Also consists of an internal road network.	✓ Strong business supportive environment within and surrounding the Employment Area. ✓ Abuts the Service Industrial Area towards the southwest and is less than 5km from the Major Bennett Industrial Park, where there are existing businesses within both areas. • Could be approved with more non-industrial-supportive uses.
Orono Employment Area (Municipality of Clarington)	✓ Overall configuration of Employment Areas is good - parcels are clustered and well-contained. The Employment Area is also separated from the Urban Residential uses by Highway 115. ✓ Parcel sizes range from medium to large.	✓ Fronts onto Highway 115 and is adjacent to the Highway 115 and Concession Road 6 interchange. ✓ Although limited, Tambyln Road offers an internal road network into the Industrial Area. ✓ Industrial Area is situated between Highway 401 and Highway 407, and is accessible to both via Highway 115.	✓ Existing Gateway Commercial and Village Centre designations with existing businesses and land use that provides a business-supportive environment. • Limited business-supportive environment. • Only Industrial Area within the Municipality that is not in proximity to Highway 401, like what is observed with Courtice, Bowmanville, and Newcastle Urban Areas. • Challenging to attract business and economic activity from the Employment Areas along Highway 401 and up towards the Industrial Area in Orono.
Port Perry Employment Area (Township of Scugog)	✓ Overall configuration of the General Industrial Employment Area is good - parcels are clustered and well-contained, and buffered from residential land uses. ✓ Overall structure of the Employment Area is clear and purposeful (i.e. Prestige Industrial surrounds the General Industrial). ✓ Wide range of parcel sizes available within this Employment Area. • Surrounded by Open Space and Hazard Lands designations, which can impact developable potential and marketability.	✓ Employment Area is contained by Highway 7 and the Regional and Local Road network (e.g. Regional Road 8 and Scugog Line 6). • Connected to Highway 407 via Highway 7 by about 20 km.	✓ Strong business-supportive environment within the Employment Area. A lot of existing and established businesses. ✓ Employment Area is also supported by non-industrial-supportive uses.

Checkmark (✓) indicates a strength while a bullet (•) indicates a potential area of improvement. Source: derived by Watson & Associates Economists Ltd., 2020.



Figure 3-12 outlines the designated and vacant employment land supply of the Employment Areas of the three comparator municipalities. It also shows the range of available parcel sizes of vacant lands within Employment Areas. Key observations include:

- The City of Peterborough has had success in marketing and developing Employment Areas in the Major Bennett and Peterborough East Industrial Parks within the last decade. This has largely been due to the strong land assembly, transportation and infrastructure, and business-supportive environment characteristics previously outlined in Figure 3-11. The Industrial Parks' vacant employment land supply opportunities are decreasing, however, as only a little less than a third of their designated Employment Areas is vacant. Moreover, compared to the other Employment Areas surveyed, the industrial parks have the narrowest range of available parcel sizes of vacant lands within Employment Areas;
- The Orono Employment Area has the widest range of available parcel sizes of the Employment Areas surveyed and the lowest share of vacant Employment Areas compared to the other surveyed Employment Areas; and
- The Port Perry Employment Area currently has almost three-quarters of its designated Employment Areas as vacant.



Figure 3-12
Designated and Vacant Employment Land Supply of the Employment Areas of the
Comparator Municipalities

Employment Area	Designated Employment Lands (ha)	Vacant Employment Land (ha)	Share of Vacant Employment Land (%)	Range of Available Parcel Sizes
Major Bennett Industrial Park and Peterborough East Industrial Park (City of Peterborough) ^{1, 2}	111	32	29%	3 ha to 9 ha
Orono Employment Area (Municipality of Clarington) ³	29	5	17%	< 1 ha to 53 ha
Port Perry Employment Area (Township of Scugog) ³	351	248	71%	0.4 ha to 15 ha

¹ Designated employment lands derived from Greater Peterborough Area Economic Development Corporation, August 2004.

² Vacant employment lands derived from City of Peterborough Open Data "Major Bennett Industrial Park Available Land Map" and "Peterborough East Industrial Park Available Land Map," both last updated in August 2019.

³ Source: Durham Region Employment Land Inventory, 2018.

The observations in Figure 3-11 and Figure 3-12 provide insights for the Township on how to potentially plan for marketable Employment Areas and developable potential.

3.4.2 Economic Attributes of Comparator Municipalities

A factor influencing business decisions on where to locate is the cost competitiveness (both capital investment and operating costs) of the development in relation to market demand and potential return on investment. Key cost parameters include land costs, development charges, and property taxes, which are outlined in Figure 3-1 and discussed below within the broader regional industrial market context.

Serviced Employment Land Prices

From a competitiveness perspective, employment land prices can provide a key advantage, especially for land-expansive uses such as transportation, wholesale trade/logistics, warehousing and large-scale manufacturing. Though competitive land costs provide an economic advantage in terms of the cost of development, very low land prices may be indicative of low market demand.

Prices for serviced vacant land in Employment Areas across the regional market are significantly lower than in markets in the G.T.A. Land prices in the G.T.A. generally range between \$400,000 and \$1,000,000+ per acre. As shown in Figure 3-13, the



average serviced employment land prices for the comparator municipalities range from \$250,000 to \$300,000 per acre.

Development Charge Rates for Industrial Development

The development charge rates for industrial development (per sq.ft.) were explored because they serve as input into the total development cost of an industrial development. Figure 3-13 outlines that the development charge rates for industrial development on a per sq.ft. basis ranges from \$0 per sq.ft. in the City of Peterborough due to 100% development charge exemptions in the Major Bennett and Peterborough East Industrial Parks, to \$15.36 per sq.ft. in the Township of Scugog. The development charge rate for industrial development in Cavan Monaghan is \$6.28 per sq.ft.¹

Municipal Property Taxes

Property tax rates represent a consideration for business location decisions since taxes impact operating profit annually. Figure 3-13 shows the industrial taxes, based on 2019 municipal property tax rates of each comparator municipality. As shown, the industrial tax rate in the Municipality of Clarington is the highest (3.42%), while the Township of Scugog has the lowest (3.23%). The industrial tax rate for Cavan Monaghan is 2.86%.

¹ This rate is after considering the County's exemption for the first 2,690 sq.ft.



Figure 3-13
Review of Economic Attributes of the Employment Areas of Comparator Municipalities

Employment Area	Costs of Serviced, Vacant General Industrial Employment Designated Land (average dollars per acre) *	Development Charge Rates for Non- Residential/Industrial Development (per sq. ft.)	Industrial Tax Rates * *
Major Bennett Industrial Park and Peterborough East Industrial Park (City of Peterborough) ¹	\$ 250,000	\$0.00	3.34%
Orono Employment Area (Municipality of Clarington) ²	\$ 300,000	\$12.77	3.42%
Port Perry Employment Area (Township of Scugog) ³	\$ 300,000	\$15.36	3.23%

* Source: Derived by Watson & Associates Economists Ltd. from the Durham Region Competitiveness Study (2018).

* * 2019 industrial tax rates of each municipality.

¹ According to the development charge rates effective January 1, 2020, the City's overall non-residential development charge rate is approximately \$11.86 per sq.ft. However, most of the industrial lands listed in Schedule D of the City's By-Law No. 19-096 which are exempt from development charges are located within the Major Bennett and Peterborough East Industrial Parks.

² Development charge rate was derived by adding the local industrial and Regional industrial development charge. For the local industrial charge, this was based on the current non-residential development charge rate effective January 15, 2020 from the Municipality of Clarington. Note that the 50% development charge exemption for new industrial buildings on a vacant lot was included. For the regional industrial charge, this was based off of the Region-wide development charge rate effective July 1, 2019.

³ Development charge rate was derived by adding the local industrial and Regional industrial development charge. For the local non-residential charge, this was based on the current industrial development charge rate effective July 1, 2019 for the Township of Scugog. For the regional industrial charge, this was based off of the Region-wide development charge rate effective July 1, 2019.

Summary

The cost of serviced employment land, development charge rates, and municipal property taxes are key economic and financial factors of businesses' locational decisions. High land costs, development charge rates, and/or property taxes within a municipality have the potential to reduce business attraction, however other physical attributes, such as those mentioned in the previous section, must also be considered. For example, a business may choose to locate in a municipality with high land costs and development charge rates because these are outweighed by the benefits of having access to the 400-series highways, quality of Employment Areas (i.e. municipal services and amenities, urban design standards, etc.), surrounding business supportive



environment, and limits to environmental and servicing constraints. Furthermore, the opposite may be true in that a business may not need highway visibility, or access to municipal services and amenities and therefore chooses to locate in a municipality with lower industrial development costs and wider range of options of serviced, flat industrial lands.

Based on the comparison of the surveyed municipalities, the following observations regarding Cavan Monaghan's competitive position in the industrial land development market can be drawn:

- Cavan Monaghan is well located along Highway 115 and with access to the Highway 401 corridor. This allows it to be accessible to a range of markets in Central Canada and north-eastern United States;
- As will be described in Chapter 4, the Township has an ample supply of large, vacant non-residential lands of varying parcel sizes that are also surrounded by supportive uses and businesses. The Township will need to explore strategies which address servicing and physical development constraints in order to improve the developable potential of its supply and increase shovel-ready supply;
- Opportunities exist to build synergies with the three post-secondary institutions (i.e. Fleming College, Seneca College, and Trent University) in the surrounding area;
- The Township's development charge rate for industrial development is lower than two out of three of the comparator municipalities surveyed and the County offers a development charge exemption related to an initial square footage amount of industrial development. Furthermore, the Township's industrial tax rate is lower than the comparator municipalities. Both low development charge and industrial tax rates are favourable from a cost of development perspective and have the potential to attract businesses to locate within Cavan Monaghan; and
- Cavan Monaghan offers a high quality of life which is an increasingly important attribute for both employers and employees.

When it concerns municipal competitiveness and business attraction, municipalities have control over land-use planning, infrastructure provisions (e.g. transportation, water and wastewater, etc.), and determining property taxes and development charge rates. Municipalities will need to ensure land-use policy and development tools are used to develop attractive environments for businesses to locate. They will also need to



balance determining property taxes and development charge rates between attracting businesses and recovering municipal costs of infrastructure and service provisions.

3.4.3 Target Sector Opportunities

Ultimately, future population and housing growth within Cavan Monaghan is determined in large measure by the competitiveness of the export-based economy within the Township and the surrounding market area, and the growth potential in local employment opportunities.

Given the local and regional infrastructure assets located within and surrounding the regional market area, Cavan Monaghan is well-positioned to accommodate development across a broad range of industry sectors, including the following, which are also aligned with the Future Ready Strategic Plan (2020 to 2024) of the Peterborough and Kawartha Economic Development Corporation:

- Agri-business and food processing;
- Clean technology;
- Transportation, warehousing and wholesale; and
- Advanced manufacturing.

The growth of these broad employment sectors (and the specific industry clusters within them) will ultimately depend on the evolving nature of macro-economic trends (i.e. trends in domestic manufacturing, etc.), the impacts of government stimulus and initiatives (i.e. clean technology and green energy solutions), as well as the competitive forces which influence the ongoing success of the industry within a particular region.

Agri-Business and Food Processing

Agri-business and food processing provide an opportunity to deepen agricultural activity and increase productivity of the industry by providing value-add products and services. Peterborough County and the broader regional market have a strong agriculture base from which to draw. The availability of agricultural land and/or local growers is paramount to this industry. The following attributes are considered important by firms in this industry when expanding or entering a market:

- Availability of agricultural land and/or local growers;



- Proximity to storage facilities (such as grain elevators), or lands with provisions for laydown yards or open storage;
- Access to highways and proximity to major transportation infrastructure networks to facilitate the movement of goods for export (ports and rail freight services);
- Proximity to surrounding employment markets and related industry clusters; and
- Competitive land prices.

Clean Technology

The clean technology sector comprises a number of diverse industries centred around manufacturing, engineering, research and technology, as well as utilities and power generation. The cluster of post-secondary institutions located within the surrounding region, such as Fleming College, Seneca College, and Trent University, have formed an important foundation in Cavan Monaghan to foster economic growth particularly in this knowledge-based industry.

Advanced Manufacturing

Advanced manufacturing is the use of innovative technology to improve products or processes. Businesses within this sector have a unique set of requirements in order to run their operations efficiently, most of which Cavan Monaghan is able to provide. The most relevant of these needs are as follows:

- Access to highways (e.g. Highway 115 and the recent Highway 407 extension);
- Access to skilled and unskilled labour;
- Proximity to markets and related industry clusters;
- Compatible surrounding lands;
- Market choice of vacant Employment Areas and land availability in adjacent areas for future on-site or off-site expansion;
- Competitive land prices; and
- Availability of industrial space for lease or purchase.

Competing regions looking to expand their economic base by attracting advanced manufacturing firms must be capable of providing for the time-sensitive needs of this employment sector, while simultaneously providing a skilled workforce, competitive land prices, as well as on-site and off-site amenities.



Building space requirements are typically in the 5,000 to 10,000 sq.ft. range for industrial buildings. There is also a need to ensure that sufficient market choice of shovel-ready vacant lands is provided, as well as land availability for future on-site or off-site expansion.

Transportation, Warehousing and Wholesale Trade

The transportation, warehousing and wholesale trade sector typically has numerous regional and local site requirements. This is due mainly to the larger land requirements of this sector, as well as the importance of being near its service markets. Based on these features of the sector, the following are key desired site attributes to be considered:

- Access and proximity to limited-access highways;
- Competitive land prices;
- Availability of large tracts of land for development and future expansion;
- Flexibility of zoning, parcel configuration;
- Compatible surrounding land uses; and
- Intermodal transportation potential.

When combined effectively, these attributes contribute to the efficiency and ultimately the profitability of transportation, warehousing and wholesale firms. Generally, businesses within this sector require competitive land pricing for large, flexible tracts of land required for large warehouses, storage yards and shipping areas. Locational requirements are focused on direct access to process distribution channels through various modes of transportation.

The structure of the Canadian economy focuses attention on logistics as a source of competitive advantage, because it is increasingly dependent on trade. In addition, the growing interdependence of companies and their suppliers continues to increase the importance of this integrated business process. In turn, this is driving the need for more, bigger and better-located warehouses and logistics facilities.

This sector is about the movement and storage of commodities. Further, this sector plays a supportive role for other sectors, such as retail, manufacturing and agriculture. For Cavan Monaghan, the strength of this sector will play a role in further developing the agri-business/food processing and advanced manufacturing sectors.



3.4.4 The Role of Public and Private Sectors in Industrial Land Development

In many communities across Ontario, relatively low land prices and slower rates of development activity create difficulties in attracting and sustaining private-sector development of employment lands. The relatively low market price of serviced land creates conditions that limit private-sector interest and involvement in land development (i.e. the costs of servicing lands are too high relative to market prices of serviced land). The absence of the private sector necessitates municipal development of industrial/business parks. Under these circumstances, many municipalities take a pro-active approach and develop municipal industrial/business parks, investing municipal dollars to buy, subdivide and fully service the land. Recouping municipally funded servicing costs (in full or in part) occurs through land sales to end users who then develop the parcels.

These land sales not only account for recouping the servicing costs, but also a minimum return on investment to the municipality. This begins forming a relatively high threshold point for private sector involvement, which is then further enlarged by the differing cost/benefit methods and expectations regarding return on investment. The private sector typically only includes the revenue of the sale of the serviced land in its return on investment analysis. This is unlike the municipality which factors in not only the revenue generated from the sale of the serviced land, but also the potential employment, tax assessment and development charge revenue generated from the proposed development. This fundamental difference in approach can have a significant impact in terms of expected return on investment (revenue from sale of serviced land less costs), but also the point at which the market is conducive to private-sector involvement.

Given these general observations of the role of public and private sector in industrial development, the Township continues to have a leadership role in developing a vision and establishing a strategy for its Employment Areas. This includes implementing the recommendations of this study which will be further discussed in Chapter 10. Establishing this vision and strategy will also enable the Township to discern public-private partnership opportunities to pursue.



3.5 Stakeholder Consultation

Key stakeholders were interviewed in order to better understand the current state of the Township's Employment Areas, in terms of their market supply potential, relative strengths and weaknesses by geographic location and overall market competitiveness. These interviews also provided the ground insight in developing a cohesive vision related to the Township's Employment Areas and, more broadly, future local economic opportunities.

The Consultant Team worked with the Township's Technical Advisory Committee (T.A.C.) and staff to develop a list of stakeholders to interview, with the goal being to obtain a cross-section of stakeholders across different industry sectors and organizations that would provide local insight into the Township's existing economy and emerging industries. Key stakeholders interviewed include Township staff and departments, the Peterborough and Kawartha Economic Development Corporation, Peterborough Airport, Kawartha Downs, environmental consultants, industrial and retail brokers, etc. Over a dozen stakeholders were contacted and invited to participate in telephone interviews with the Consultant Team in the summer of 2019. Ten stakeholders were eventually interviewed using the Interview Questionnaires provided in Appendix A.

The key takeaways from these interviews are as follows:

- **There was overall agreement that the Township is well-positioned to attract economic activity and improve its competitiveness in the long term; however, it was expressed that improvements are needed to the market supply of Employment Areas, and their alignment with municipal services and infrastructure.** Stakeholders expressed that the Township is well-positioned to capitalize on the economic activity and opportunities occurring in the Peterborough and the Kawartha region due to:
 - Proximity to the G.T.A. and the City of Peterborough;
 - Access to Highway 115, the new Highway 407 extension, railway, and Peterborough Airport;
 - Comparably lower land prices relative to the City of Peterborough, G.T.A. municipalities, and most Highway 401 corridor municipalities;



- The quality of life offered in the Township, which has increasingly become a growth driver given declining housing affordability in the G.T.A.; and
- The cluster of post-secondary institutions located within the surrounding region, such as Fleming College, Seneca College, and Trent University, which form an important foundation in fostering economic growth particularly in knowledge-based industries such as aerospace, agriculture, biotechnology, cannabis, clean technology and the environment, and social enterprises.

In order to capitalize on the above characteristics and avoid missed opportunities in attracting businesses and emerging industries, there is a consistent need for varied types of Employment Areas (e.g. size, location, configuration, amenities, etc.), but more specifically there is a need for large, serviced, and developable Employment Areas. Stakeholders expressed that there is an overall challenge to attract new businesses and encourage existing businesses to scale-up (e.g. home-based businesses looking to expand and move out of their residence, but have difficulty identifying Employment Areas that are appropriately sized and configured, and in the right allocation) because of limited market supply of Employment Areas in the Township. It was also shared that in order to capitalize on the above characteristics, there is a need to revisit the land-use designations and permissions of some of the Township's Employment Areas, which is further discussed below.

Overall, stakeholders agreed that in the absence of varied types of Employment Areas, the Township's market supply potential and attractiveness can become strained. It also has the potential to limit the types of sectors that the Township and the Peterborough and the Kawarthas region could support and/or pursue. This is especially concerning given the changing nature of employment and need to capitalize on emerging knowledge-based and services-producing sectors in the near term. The overall suggestion was for the Township to:

- Review its servicing potential and plans given the growth forecasting exercises to be conducted through the G.M.S.;
- Develop a vision for growth and planning in the Township to then guide the provision and phasing of servicing; and
- Recognize the types of emerging sectors that the Township needs to attract to begin readying the Township's Employment Areas.



- **Land-use designations and permissions of some Employment Areas need to be revisited given increasingly protective environmental policies and designations, and therefore development constraints, and the changing nature of employment.** It was shared that some of the Employment Area land-use designations, particularly that of the Rural Employment Area designation, were designations that carried over from the amalgamation which occurred in the late 1990s. This has not only led to some land-use incompatibility issues between the Rural Employment Areas and other designations in the Rural Areas over time, but has also meant the existing Rural Employment Area policy framework (i.e. O.P. policies and zoning by-law permissions) has become less reflective of the Township's changing economy and overall changing nature of employment in North America. Moreover, it was shared that non-industrial uses were beginning to locate in industrial spaces (e.g. rock climbing in vacant, tall warehouses; boxing gyms; wedding venues; and trampoline and gymnastic facilities). Stakeholders encouraged the Township to re-evaluate and update its designations and permitted uses to reflect present day and anticipated future conditions.
- **Continue to support general aviation and agriculture industries in the Township and the Peterborough region.** It is recognized that these sectors have an established presence and economic activity that requires continued support as the Township plans for long-term growth within its Employment Areas. Stakeholders shared that forms of support could include using policies that offered protection of the Rural and Airport Employment Areas surrounding the Peterborough Airport, broadening the permitted uses in Rural and Airport Employment Areas to further support surrounding general aviation and related businesses, and recognizing the evolving nature of the agriculture sector towards on-farm diversified uses and vertical agriculture, for example.
- **The cluster of post-secondary institutions in the region and their growing research and development efforts are opportunities for the Township to plan for the changing nature of employment and improve labour force attraction and retention.** Due to the natural heritage, hydrological, and agricultural landscapes of the Peterborough and the Kawarthas region, Fleming College, Seneca College, and Trent University have focused their efforts on supporting industries that could benefit from research and development,



institutional programming, and internships, for example, related to these landscapes. The stakeholders shared that this offers opportunities for the Township to grow its employment base and economic activity in sectors such as aerospace, agriculture, biotechnology, cannabis, clean technology and the environment, and social enterprises.

3.6 Observations

The future population and employment growth potential of the Township of Cavan Monaghan is closely tied to the economic potential of the broader economic region. As discussed herein, this includes Peterborough County as well as the Township's primary commuter-shed. Local and regional economic growth and associated job creation represent key drivers of population growth across the Township. The Township's economy is concentrated in a number of employment sectors related to manufacturing, health care, education, retail and accommodation and food services. Looking forward, existing and emerging knowledge-based sectors such as professional, technical and scientific services, health care and social assistance, educational services, tourism, and value-added manufacturing are expected to represent the fastest growing employment sectors of the Township.

Despite future economic growth potential across a broad range of employment sectors, Peterborough County's labour force increased marginally between 2006 and 2016. Since 2016, the labour force within the Peterborough C.M.A. has steadily increased, while the unemployment rate has steadily declined. For the Township of Cavan Monaghan's local economic base to grow, effort will be required to continue to retain and attract new skilled working residents to the Township, largely within the Millbrook Urban Settlement Area. Attraction efforts must also be linked to housing accommodation (both ownership and rental), municipal services and infrastructure, as well as quality of life attributes which appeal to the younger mobile population, while not detracting from the Township's attractiveness to older population segments.



Chapter 4

Housing and Employment Lands Supply Analysis



4. Housing and Employment Lands Supply Analysis

4.1 Housing Supply

To determine the Township's capacity to accommodate future housing growth, a residential supply inventory was prepared. This inventory included vacant residential units in the form of registered subdivisions (remaining to be built), subdivisions that are draft approved, and applications currently undergoing review. In addition, potential units can be accommodated through residential intensification in the B.U.A (also known as the built boundary) of the Millbrook Urban Settlement Area. Development opportunities in the B.U.A. primarily exist in the form of infill and longer-term redevelopment opportunities. The Township also has vacant designated residential lands (i.e. greenfield lands outside the Millbrook B.U.A. but within the settlement boundary) that can accommodate future housing growth. Housing supply opportunities across the development approvals process, intensification and redevelopment, and greenfield development are discussed in the following sections.

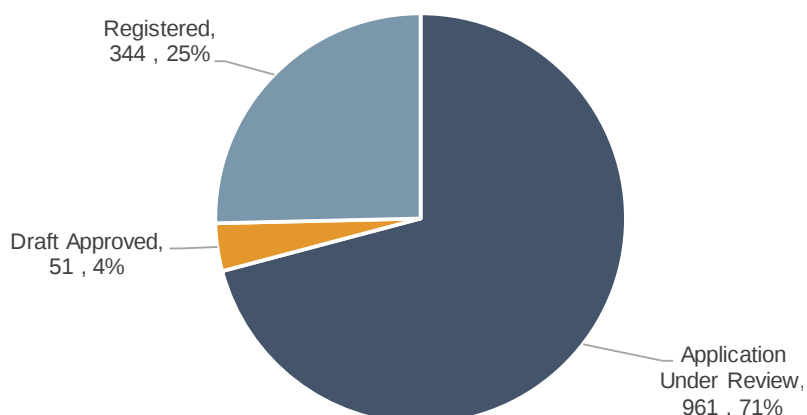
Detailed maps and tables of the Township's residential supply can be found in Appendix B.

4.1.1 Housing Supply in the Development Approvals Process

As of August 2019, approximately 1,356 units were found to be within the development approvals process (registered un-built, draft approved, and currently under review) across the Township's settlement areas. Figure 4-1 and Figure 4-10 illustrate that most of the Township's residential supply in the development approvals process is under review (71%) and low density (63%).



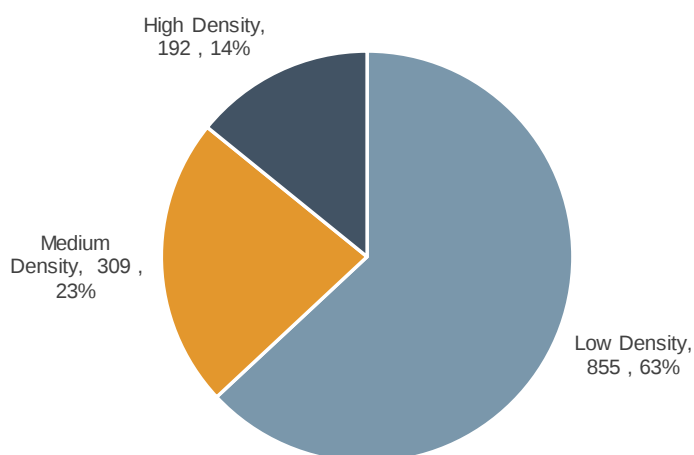
Figure 4-1
Units in the Development Approvals Process by Planning Application Status
in the Township of Cavan Monaghan



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: numbers may not add precisely due to rounding.

Figure 4-2
Units in the Development Approvals Process by Housing Type
in the Township of Cavan Monaghan



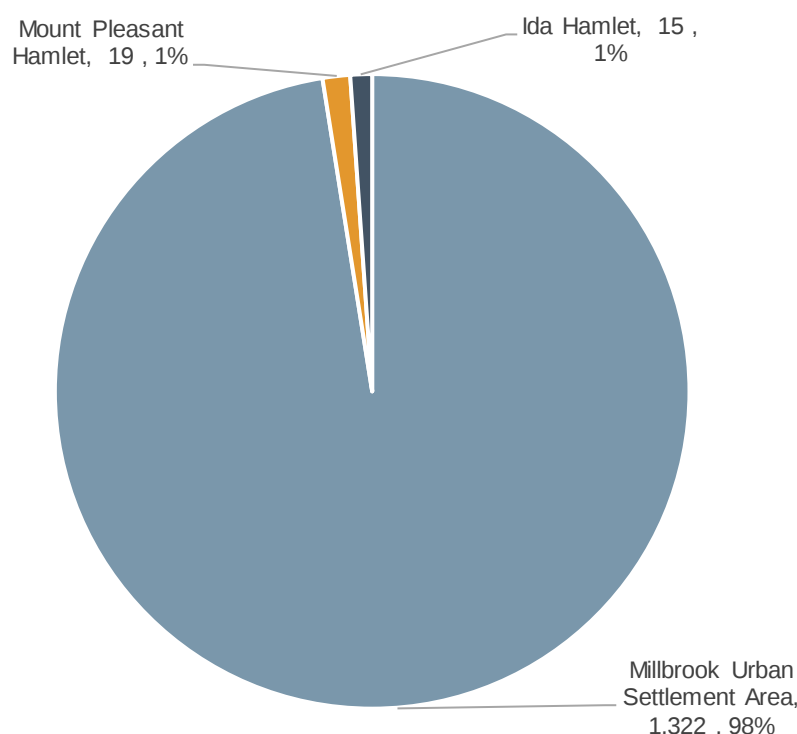
Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: Numbers may not add precisely due to rounding.



It is evident in Figure 4-3 that Millbrook, which is the only settlement area in the Township with full municipal services, continues to be the focus of development, as approximately 98% of the Township's supply in the development approvals process is concentrated in this settlement area. The remaining supply in the development approvals process is in the Ida (1%) and Mount Pleasant (1%) Hamlets.

Figure 4-3
Units in the Development Approvals Process by Settlement Area
in the Township of Cavan Monaghan



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: Numbers may not add precisely due to rounding.

4.1.2 Residential Greenfield Development Opportunities in the Millbrook Urban Settlement Area

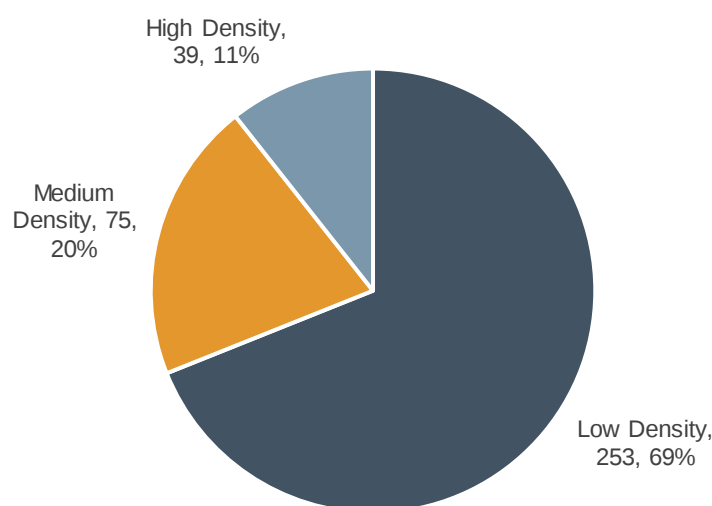
To determine an inventory of D.G.A. lands in Millbrook currently not active in the development approvals process, a desktop review was carried out using mapping data and aerial photography. In determining the potential housing yield on D.G.A. lands, the following steps were undertaken:



- A net to gross ratio of 65% was applied to the total vacant land area to determine the net developable land area (less environmental take-outs) available for residential development; and
- The potential housing unit supply potential was calculated on net developable lands using residential density and housing mix assumptions based on existing residential development conditions and residential density trends of development activity in Millbrook.

The estimated unit yield of the Township's residential greenfield development opportunities is estimated at 367 units. As demonstrated in Figure 4-4, approximately more than half of those units are anticipated to be low density.

Figure 4-4
Vacant Land Supply Opportunities and Unit Yields in the Designated Greenfield Area of the Township of Cavan Monaghan



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be single and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.
Note: Numbers may not add precisely due to rounding.

4.1.3 Residential Intensification Supply Opportunities

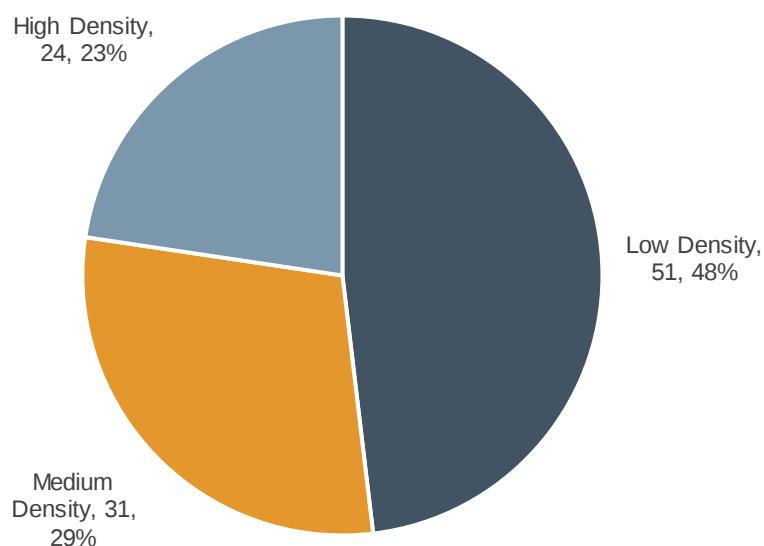
Intensification supply opportunities in Millbrook were identified within the B.U.A. in accordance with the definition of housing intensification as per section 1.1.3.3 of the 2020 P.P.S. First, vacant lots within the B.U.A. of Millbrook were reviewed for



residential intensification opportunities. Infill lots appropriate for intensification within the B.U.A. that were not active in the development approvals process were identified using mapping data and aerial photography. Once this intensification supply inventory was prepared, the site potential for future development was determined using residential density and housing mix assumptions based on existing residential development conditions and residential density trends of development activity in Millbrook. Finally, a potential unit yield for each site was determined. Long-term redevelopment opportunities were not considered as part of this intensification supply analysis.

The estimated unit yield of the residential intensification opportunities in Millbrook is estimated at just over 100 units. As demonstrated in Figure 4-5, approximately almost half of those units (48% or 51 units) are anticipated to be low-density housing forms.

Figure 4-5
Intensification Supply Opportunities and Unit Yields in the Built Boundary
of the Township of Cavan Monaghan



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be single and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: Numbers may not add precisely due to rounding.



4.1.4 Summary of the Township's Housing Supply Opportunities

The potential to accommodate new housing development throughout the Township as of August 2019 is shown in Figure 4-6. It is anticipated that the Township's overall total of residential supply opportunities will be approximately 1,830 units. Low density continues to be the main form of new housing development (63%), followed by medium- and high-density housing forms (23% and 14%, respectively).

Figure 4-6
Residential Supply Opportunities of the Township of Cavan Monaghan
by Type of Opportunity as of August 2019

	Housing Type				
	Low Density	Medium Density	High Density	Total	Share
Millbrook Urban Settlement Area					
Within Built Boundary					
Development Approvals Process	-	-	-	-	0%
Intensification Opportunities	51	31	24	106	6%
Total Within Built Boundary	51	31	24	106	6%
Outside Built Boundary					
Development Approvals Process	821	309	192	1,322	72%
Greenfield Opportunities	253	75	39	367	20%
Total Outside Built Boundary	1,074	384	231	1,689	92%
Other Settlement Areas					
Development Approvals Process					
Hamlets	34	-	-	34	2%
Total in Other Settlement Areas	34	-	-	34	2%
Township Total	1,159	415	255	1,829	
Township Share	63%	23%	14%	100%	

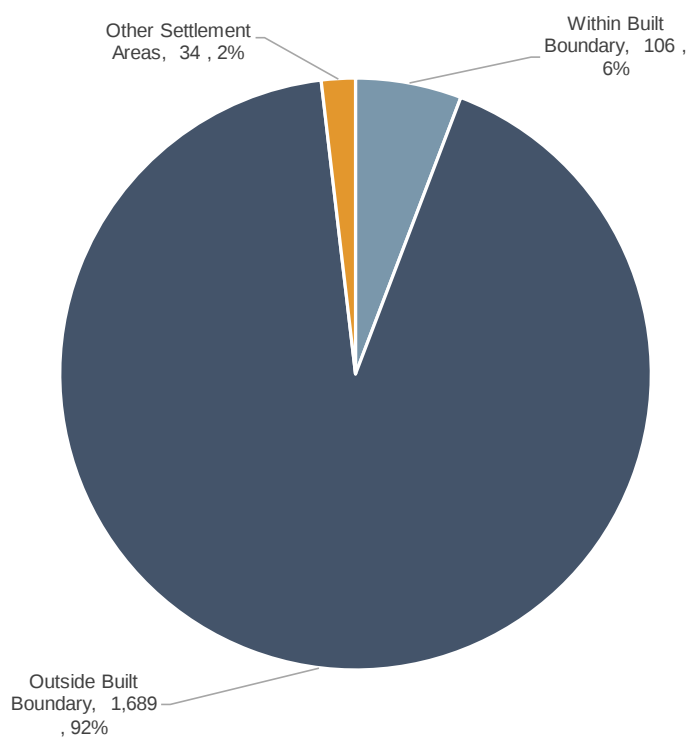
Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: Numbers may not add precisely due to rounding.

As shown in Figure 4-7 and Figure 4-8, new housing development opportunities are largely concentrated on D.G.A. lands in Millbrook (approximately 92% or 1,690 units), of which approximately 74% (1,360 units) are in the development approvals process.



Figure 4-7
Share of Overall Residential Supply by Location

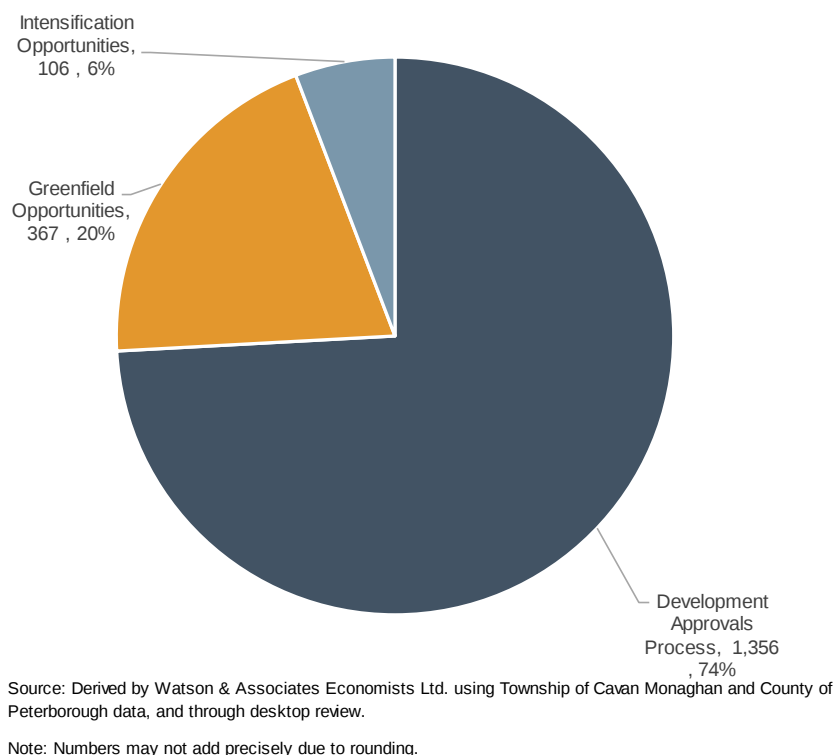


Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: Numbers may not add precisely due to rounding.



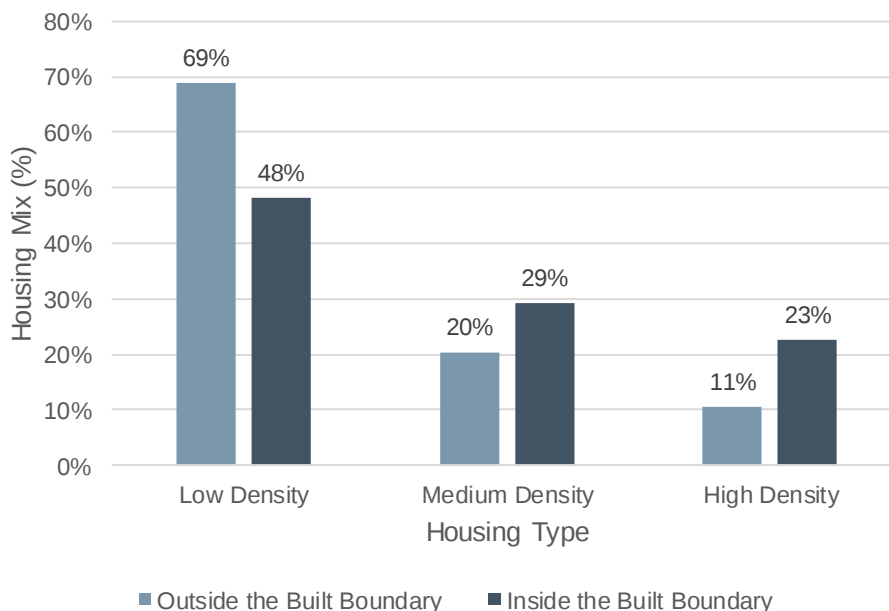
Figure 4-8
Township of Cavan Monaghan Overall Residential Supply by Type of Opportunity



Although low-density housing types continue to be the predominant housing type of the Township's total future residential supply inventory, the share of medium- and high-density housing types tends to be more concentrated in the B.U.A. (Figure 4-9). This provides some insight into near-term housing demand by structure type both within and outside the B.U.A. of the Millbrook Urban Settlement Area.



Figure 4-9
Comparison of the Greenfield and Intensification Supply Opportunities
in the Township of Cavan Monaghan



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: Numbers may not add precisely due to rounding.

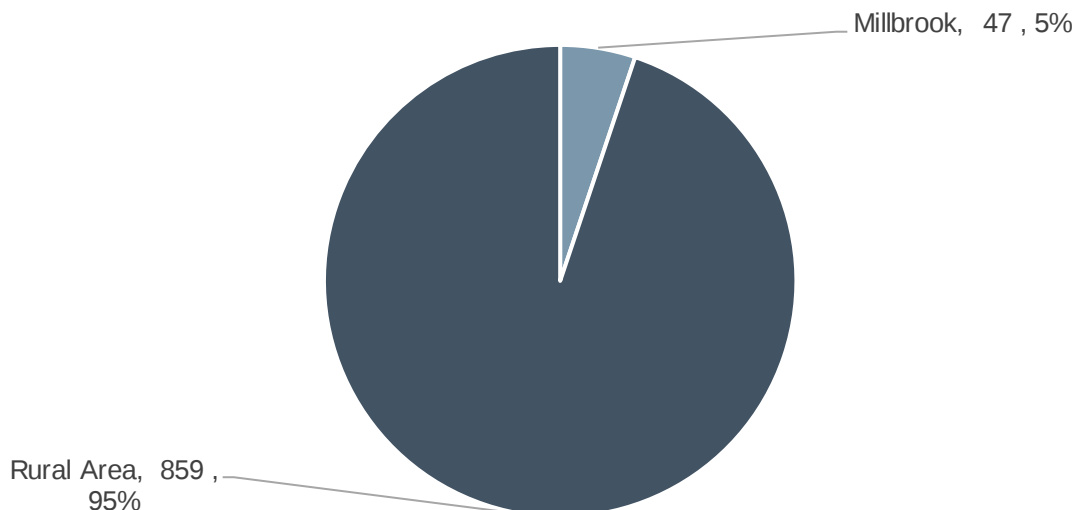
4.2 Employment Lands Supply

The Township of Cavan Monaghan consists of 905 gross ha or 589 net ha of designated Employment Areas. A significant amount of these designated Employment Areas can be found in the Rural Areas and under the Rural Employment Area designation, while a small portion is within the Millbrook Urban Settlement Area and designated as Urban Employment Area (Figure 4-10).

Detailed maps and tables of the Township's non-residential supply can be found in Appendix C.



Figure 4-10
Designated Employment Areas by Location in the Township of Cavan Monaghan
(gross ha)



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: numbers may not add precisely due to rounding.

The supply presented in this section includes vacant Employment Areas and intensification opportunities on select vacant lands within Millbrook. A summary of developed Employment Areas is also included to provide additional context regarding the overall nature of the Township's employment supply.

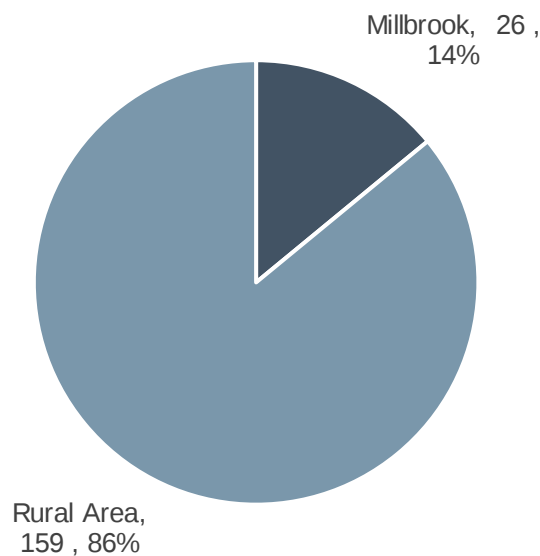
4.2.1 Vacant Employment Lands Supply

Of the designated Employment Areas in the Township, a little over a third are vacant (32% or 186 net ha).¹ Figure 4-11 further shows that of the vacant Employment Areas in the Township, most are in the Rural Area (86% or 159 net ha) compared to those in Millbrook (14% or 26 net ha).

¹ A net to gross ratio of 65% was applied to account for environmental take-outs and internal infrastructure (e.g. local roads, stormwater management facilities, local environmental features, and open space).



Figure 4-11
Vacant Employment Lands by Location in the Township of Cavan Monaghan (net ha)



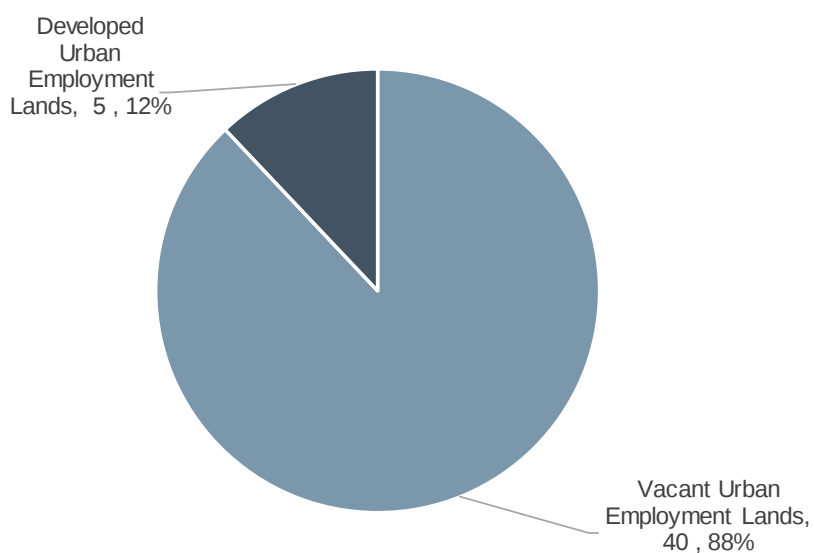
Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: numbers may not add precisely due to rounding.

Although these observations would suggest a large portion of the Township's vacant Employment Areas can be found in the Rural Area, it is important to understand these vacant Employment Areas within the context of their policy areas. Figure 4-12 and Figure 4-13 provide a greater understanding of the unique challenges and opportunities of vacant Employment Areas within Millbrook and the Rural Area. In Millbrook, approximately 88% of the designated Urban Employment Areas are vacant, while in the Rural Area approximately 29% of the designated Rural Employment Areas are vacant.



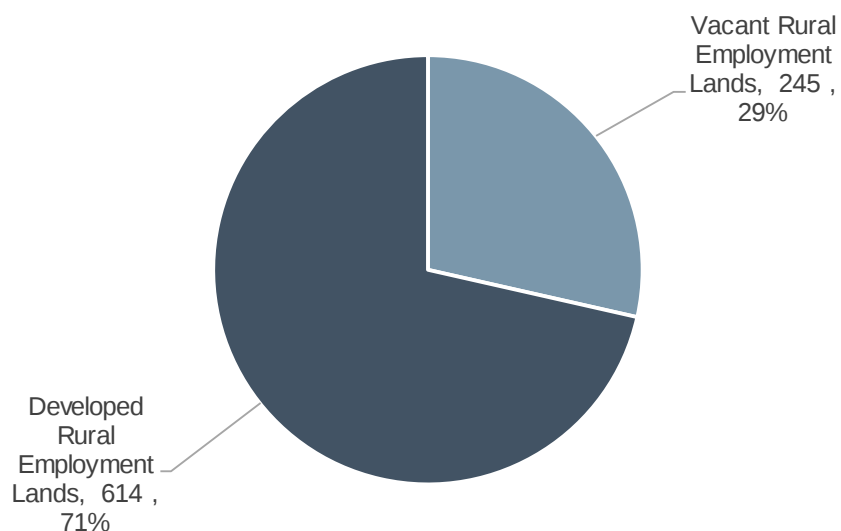
Figure 4-12
Developed and Vacant Urban Employment Lands in Millbrook (gross ha)



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: numbers may not add precisely due to rounding.

Figure 4-13
Developed and Vacant Rural Employment Lands in the Rural Area (gross ha)



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: numbers may not add precisely due to rounding.



The vacant Employment Areas in Millbrook have remained undeveloped for a few years; however, there are near-term opportunities to begin planning for the provision of municipal services to these lands, which could improve their marketability. This will be further discussed in section 8.3. Vacant Employment Areas in the Rural Area can be found in each of the four key locations within the Township that were mentioned in section 2.4 (the Highway 115 and County Road 10 interchange, the area east of the Five Mile Turn and Springville Hamlets, the area surrounding the Peterborough Airport, and the area around the Commercial Entertainment land-use designation and north of the Fraserville Hamlet). Most of the vacant Employment Areas in the Rural Area surround the Peterborough Airport and they have remained vacant for decades largely due to development constraints such as a Floodplain Area and Wellhead Protection Area, as well as increasingly protective environmental designations and policies.¹

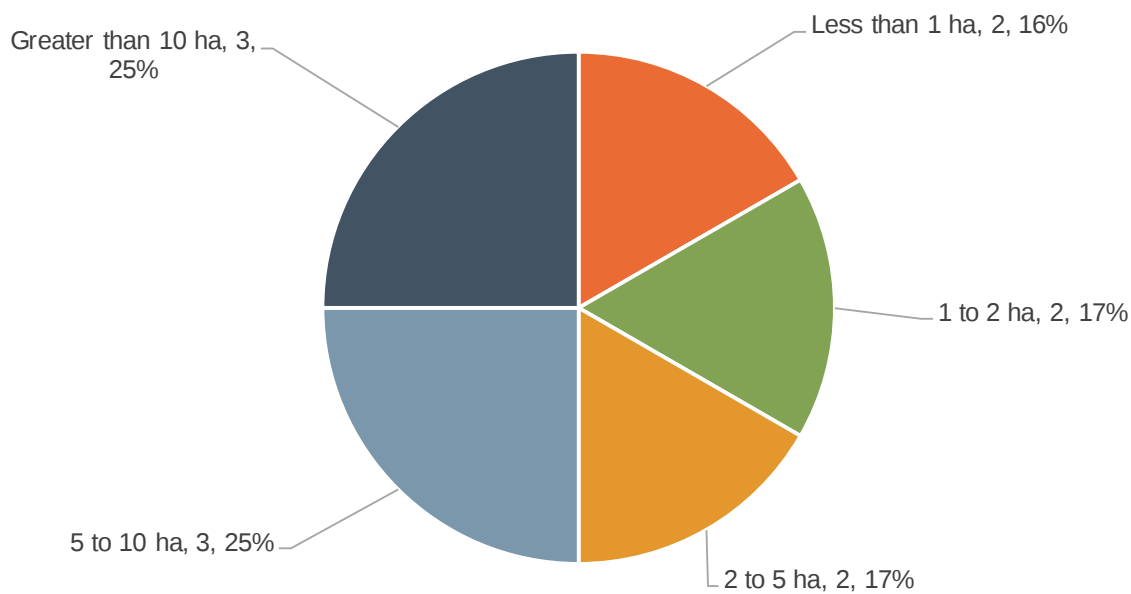
4.2.2 Parcel Sizes of Vacant Employment Lands

Vacant Employment Areas within Millbrook and the Rural Area were reviewed, and it was found that the Township has a well-balanced distribution of vacant Employment Areas across the range of parcel sizes. When assessing the vacant Employment Areas by number of parcels (Figure 4-14), approximately 50% of the Township's vacant Employment Areas are large (i.e. greater than 5 ha). Furthermore, when assessing the vacant Employment Areas by size (Figure 4-15), approximately 89% of the Township's vacant Employment Areas are large.

¹ Refer to Schedule C – Development Constraints of the Township of Cavan Monaghan Official Plan (2017 Consolidation).



Figure 4-14
Vacant Employment Lands by Parcel Size
(number of parcels)

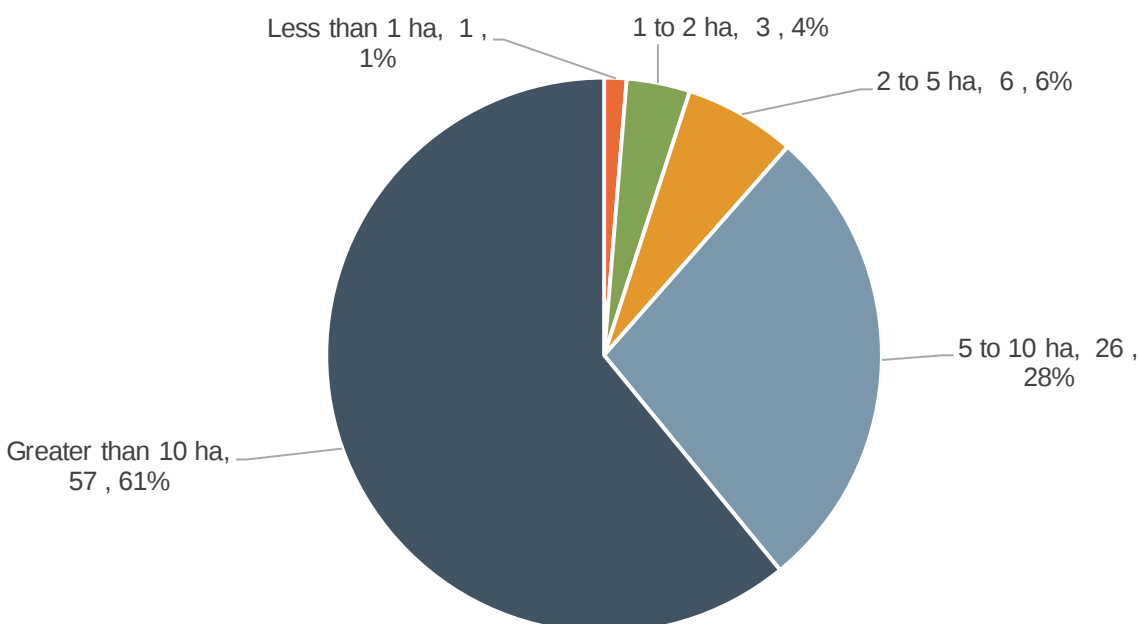


Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: numbers may not add precisely due to rounding.



Figure 4-15
Vacant Employment Lands by Parcel Size
(area, gross ha)



Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review.

Note: numbers may not add precisely due to rounding.

Although these observations suggest the Township has an adequate amount of large vacant Employment Areas in Millbrook and the Rural Area, most of these sites have either been on the market for a few years (i.e. in the case of the vacant Urban Employment Lands in Millbrook), or consist of development constraints and increasingly protective environmental policies and designations (i.e. Rural Employment Area Lands surrounding Peterborough Airport).

From a market choice perspective, one of the most important industrial site selection criteria relates to ensuring that an ample supply of suitable vacant serviced (and serviceable) non-residential land is available for purchase and absorption. This can be largely controlled by the Township by providing a readily available and serviced employment land supply that is beyond forecast absorption across a range of site selection choices in terms of:



- Price;
- Site size;
- Availability and cost of servicing;
- Neighbourhood and setting;
- Surrounding supportive uses and businesses;
- Zoning;
- Visibility;
- Highway access;
- Other physical characteristics (topography, environmental conditions/soil conditions, buffering);
- Tenure (lease vs. design build vs. own); and
- Other industrial land market requirements, including site proportioning (frontage to depth), timing of servicing, site expandability, etc.

If the Township is to offer an adequate supply of vacant employment land over both the short- and long-term planning periods, it needs to provide a full range of sites on the market, particularly larger developable sites (i.e. greater than 5 ha) that are serviced or serviceable, can accommodate medium to large-scale businesses as well as future expansion potential, have access and visibility to highway infrastructure, and have limited development constraints. If development constraints identified on larger non-residential sites are not addressed, potential forecast industrial absorption may be impeded.

4.2.2.1 Intensification Supply Potential on Employment Lands in Millbrook

Intensification is the development of a property, site, or area at a higher density than currently exists. It can be approached through redevelopment, development of vacant and/or underutilized lots within previously developed areas, infill development, and the expansion or conversion of existing buildings.¹ As explained in the guiding principles of the Growth Plan, 2019, intensification is intended to make efficient use of land and infrastructure.

¹ Provincial Policy Statement (2014)



Intensification opportunities on underutilized non-residential lands were reviewed within Millbrook; approximately 1 ha was identified and will need to be considered when identifying the Township's long-term non-residential lands needs.

4.2.3 Developed Employment Lands Supply

The developed Employment Areas supply provides a broader understanding of the Township's non-residential supply. Overall, 528 ha of designated Employment Areas in the Township are developed. Most of this developed employment supply is in the Rural Area (99% or 523 ha); however, as mentioned earlier with the vacant non-residential land supply, it is important to understand these developed lands within the context of their policy areas. This was previously illustrated in Figure 4-12 and Figure 4-13 from section 4.2.1. In Millbrook, approximately 12% (5 ha) of Urban Employment Areas are developed while in the Rural Area, approximately 71% (614 ha) of Rural Employment Areas are developed.

4.2.4 Summary of the Township's Employment Lands Supply

Overall, the majority of the designated Employment Areas in the Township are developed (528 ha); however, the vacant non-residential land supply is where most of the challenges and opportunities with the Township's overall non-residential land supply lie (Figure 4-16). Most of the vacant non-residential lands in the Township are either in a poor location that could give rise to concerns with sensitive land uses and incompatible uses or consist of development constraints.

Figure 4-16
Summary of Vacant and Developed Employment Lands by Area in the Township of Cavan Monaghan

Location	Vacant Employment Land (net ha)	Share of Vacant Employment Land (%)	Intensification Opportunities (net ha)	Developed Employment Land (gross ha)	Share of Developed Employment Land (%)
Millbrook	26	14%	1	5	1%
Rural Area	159	86%	0	614	99%
Total	185	100%	1	619	100%

Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data

It is apparent when assessing the non-residential land supply within Millbrook and the Rural Area that vacant lands within these areas have remained inactive for a significant amount of time. The Township appears to have an ample supply of large, vacant, non-



residential lands that are surrounded by supportive uses and businesses and have access to Highway 115. Their developable potential, however, has been limited due to a combination of lack of servicing (in the case of the Urban Employment Areas), physical development constraints, as well as increasingly protective environmental policies and designations (in the case of the Rural Employment Areas). This is further explored in subsequent sections of this study.



Chapter 5

Long-Term Population, Housing and Employment Growth Outlook, 2016 to 2041



5. Long-Term Population, Housing and Employment Growth Outlook, 2016 to 2041

In accordance with recent demographic, economic and socio-economic trends, as well as the regional and local growth drivers identified in Chapter 3, a range of long-term population, housing and employment forecasts have been prepared for the Township of Cavan Monaghan to the year 2041 and summarized below.¹ In total, three long-term scenarios – low, medium and high (reference) – were developed and are described in this chapter. Further details on the approach to preparing the growth forecasts can be found in Appendix D.

5.1 Long-Term Township of Cavan Monaghan Population and Housing Forecasts, 2016 to 2041

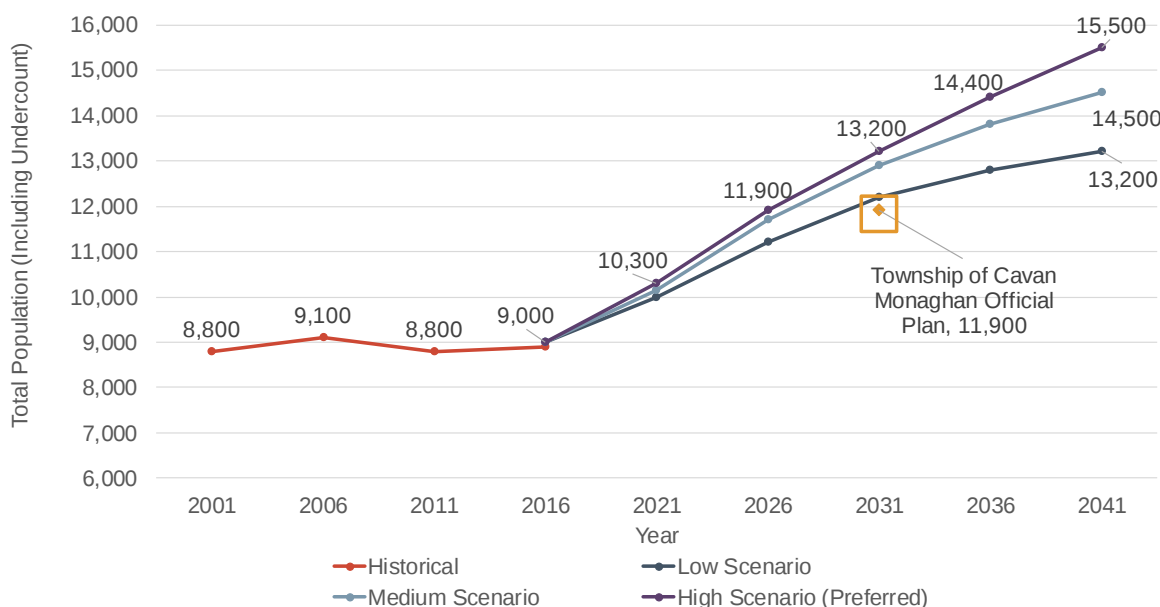
5.1.1 Long-Term Population Growth Scenarios

The population forecast scenarios are based on a range of assumptions related to total net migration, net migration by age, natural increase (i.e. births less deaths), and employment growth opportunities throughout Peterborough County and the surrounding commuter-shed. These scenarios represent the potential range of future growth which can be anticipated for the Township over the next 25 years. Each of the long-term growth scenarios represent a considerably higher average annual growth rate than achieved historically between 2001 to 2016 (0.2% annually). Figure 5-1 graphically compares the high (most likely), medium and low population growth scenarios for the Township.

¹ It is noted that the population growth scenarios include the net Census undercount estimated at 2.5%.



Figure 5-1
Township of Cavan Monaghan
Long-term Forecast Population Scenarios, 2016 to 2041



Source: 2001 to 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2019.
 Note: Population includes the net Census undercount estimated at 2.5%.

Township of Cavan Monaghan Total Population Growth					
	2016	2041	2016 to 2041	Annual Growth	Annual Growth Rate
High Scenario		15,500	6,500	260	2.2%
Medium Scenario	9,000	14,500	5,500	220	1.9%
Low Scenario		13,200	4,200	170	1.5%

Low Population Forecast Scenario

Under this scenario, it is assumed that the population base in the Township will grow at an average annual rate of 1.5% per year over the forecast period. This results in an incremental population increase of 4,200 between 2016 and 2041. Under this scenario, the rate of forecast population growth is anticipated to steadily decrease in the latter half of the forecast period due to the aging of the Township's population base.

Medium Population Forecast Scenario

Under the Medium Population Growth Scenario, population within the Township is forecast to grow at an annual rate of approximately 1.9% over the forecast period. This scenario assumes that population will increase by approximately 5,500 between 2016



and 2041. Under this scenario, the rate of forecast population growth is anticipated to decrease slightly in the latter half of the forecast period due to the aging of the Township's population base.

High Population Forecast Scenario (Reference Scenario)

This scenario assumes an average annual growth rate of 2.2% for the Township over the 2016 to 2041 forecast period. Accordingly, under the High Population Growth Scenario, the Township's total population would increase to 15,500 by 2041. Under this scenario, the rate of population growth is anticipated to remain relatively consistent throughout the entire forecast period, driven by comparatively stronger levels of continued net migration.

5.1.2 Township of Cavan Monaghan Reference Population Forecasts, 2016 to 2041: High Population Growth Scenario

5.1.2.1 Reference Population Forecast, 2016 to 2041

The High Population Growth Scenario represents the “most likely” population growth scenario for the Township for the following reasons:

- Recent building permit activity and active large subdivision developments in the planning approvals process suggests that housing growth will remain strong in the Millbrook Urban Settlement Area over the next five to 10 years. It is noted, however, that new housing development activity in 2020 and 2021 may be negatively impacted due to the economic disruption caused by COVID-19;¹
- The Millbrook Urban Settlement Area is one of four serviced areas across the County of Peterborough that can still accommodate residential development on full municipal services. With limited areas available for serviced residential growth, the Millbrook Urban Settlement Area will continue to be an attractive location to accommodate housing development within the County. It will also continue to serve as an attractive location for commercial businesses;
- The Millbrook Urban Settlement Area is already facing development pressures due to its proximity to the G.T.A. and relatively affordable housing prices. As previously mentioned, recent infrastructure projects, such as the completion of the Highway 407 extension to Highway 115, provide further opportunity for

¹ Refer to Chapter 3, section 3.1.



residents from the G.T.A. to relocate to the Township while still maintaining a relatively reasonable commute to work;

- The high quality of life offered in Cavan Monaghan is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in their respective relocation decisions;
- Employment growth in the Township has been the strongest across all Peterborough County municipalities between 2001 to 2016. Strong employment growth is expected to continue over the forecast period across a broad range of export-based industrial and commercial sectors; and
- Export-based job growth within Cavan Monaghan is also expected to lead to stronger levels of local labour force and population growth, which in turn is anticipated to generate employment in population-related commercial and institutional sectors across the Township.

Figure 5-2 summarizes the High Population Growth Scenario for the Township from 2016 to 2041 in five-year increments.



Figure 5-2
Township of Cavan Monaghan
Population Growth Forecast, 2016 to 2041

Year		Population (Including Census Undercount) ¹	Population (Excluding Census Undercount)
Historical	Mid-2001	8,780	8,460
	Mid-2006	9,130	8,840
	Mid-2011	8,820	8,610
	Mid-2016	9,020	8,820
Forecast	Mid-2021	10,120	9,880
	Mid-2026	11,890	11,610
	Mid-2031	13,210	12,890
	Mid-2036	14,390	14,040
	Mid-2041	15,500	15,130
Incremental	Mid-2001 to Mid-2006	350	380
	Mid-2006 to Mid-2011	-310	-230
	Mid-2011 to Mid-2016	200	210
	Mid-2016 to Mid-2021	1,100	1,060
	Mid-2016 to Mid-2026	2,870	2,790
	Mid-2016 to Mid-2031	4,190	4,070
	Mid-2016 to Mid-2036	5,370	5,220
	Mid-2016 to Mid-2041	6,480	6,310

Source: Data from 2001 to 2016 from Statistics Canada Demography Division by Watson & Associates Economists Ltd., 2019.

Note: Population figures have been rounded and include the net Census undercount estimated at 2.5%.

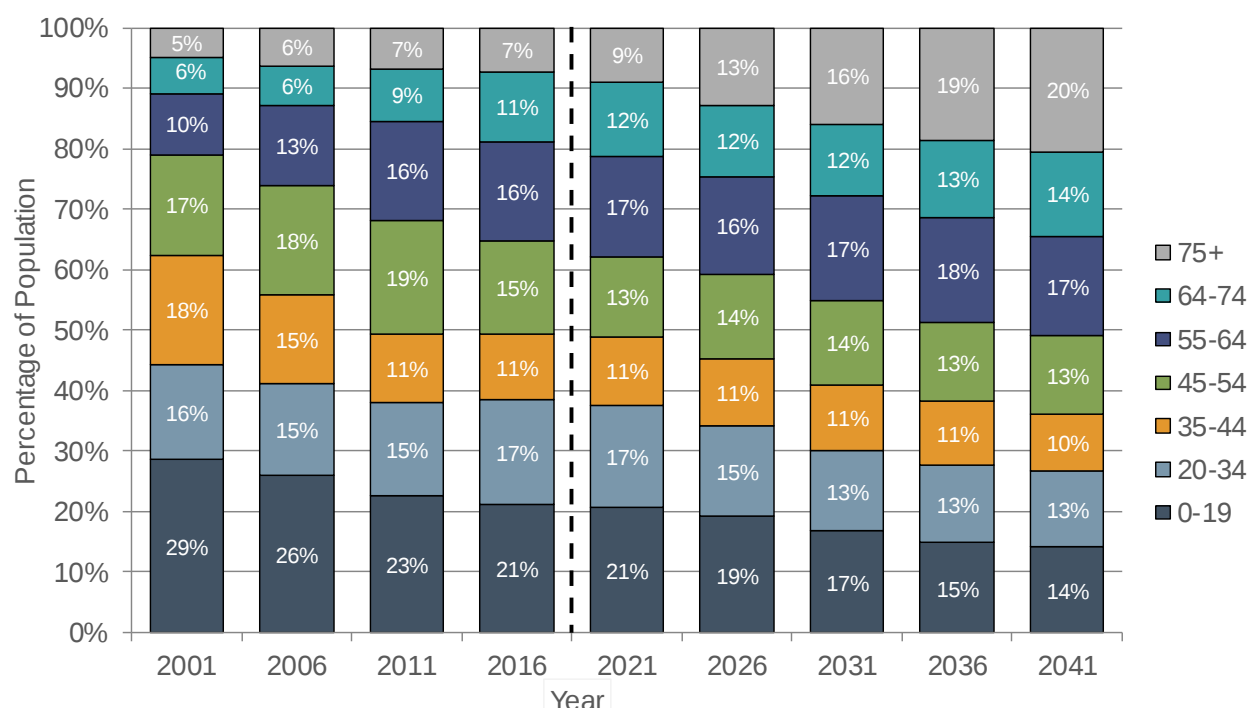
5.1.2.2 High Scenario (Reference) Population Forecast by Age Cohort, 2016 to 2041

Figure 5-3 summarizes the High Population Growth Scenario by major age group over the 2016 to 2041 forecast period for the Township. The percentage of the Township's largest age cohort, 20 to 54 years of age, is forecast to decline from 43% in 2016 to 36% in 2041. Over the forecast period, the Township's population base is expected to age significantly. Most notably, the percentage of population in the 75+ age group (older seniors) is forecast to almost triple over the forecast period from 7% in 2016 to 20% in 2041. The aging of the population and declining population growth resulting from natural increase (i.e. births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within the Township, and subsequently the regional labour force participation rate. Similar to the Province as a



whole, the Township will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions.

Figure 5-3
Township of Cavan Monaghan
Population by Age Forecast, 2016 to 2041



Source: Population forecast by age derived from 2001 to 2016 Statistics Canada Census by Watson & Associates Economists Ltd., 2019.
2016 to 2041 population forecast by age prepared by Watson & Associates Economists Ltd., 2020.
Note: Population includes net Census undercount estimated at 2.5%..

5.1.3 Township of Cavan Monaghan Housing Forecast, 2016 to 2041

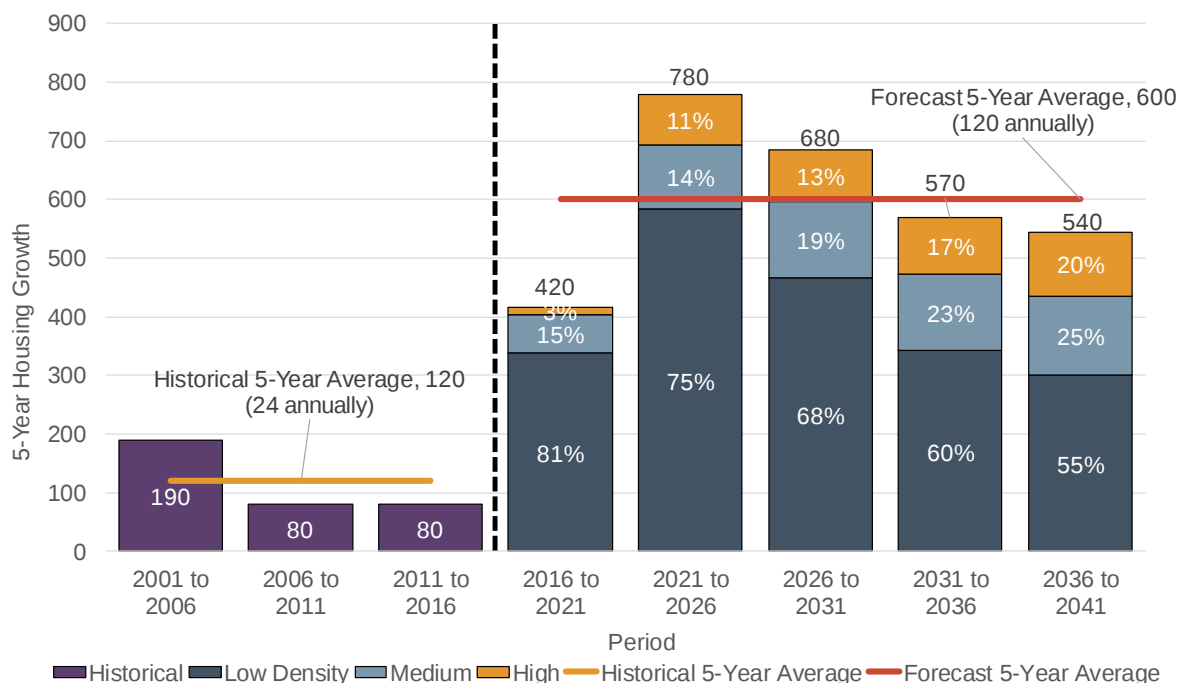
Figure 5-4 summarizes the Township's household forecast from 2016 to 2041 in five-year growth increments and by structure type. Housing trends between 2001 and 2016 are also provided for historical context. Key observations include:

- Based on a review of recent residential building permits issued for new dwellings between 2016 to 2019 and future subdivision plans, projected annual housing development during the 2016 to 2021 projection period is forecast to be significantly higher than historical trends observed over the past decade. Notwithstanding the potential near-term housing disruption, as previously discussed, the long-term housing outlook for the Township of Cavan Monaghan is positive;



- Between 2016 to 2041, forecast housing development is expected to average 120 units annually compared to an historical average of 24 units annually over the past 15 years;
- Consistent with projected population trends over the longer term, the rate of future housing growth is expected to steadily slow over the forecast period; and
- Over the 2016 to 2041 forecast period, new housing is forecast to be comprised of 65% low-density (singles and semi-detached), 21% medium-density (townhouses) and 14% high-density (apartments) units. A modest increase in the share of medium- and high-density housing forms is anticipated, largely driven by the aging of the population, potential opportunities in some settlement areas for communal serving and continued upward pressure on local housing prices.

Figure 5-4
Township of Cavan Monaghan
Five-Year Incremental Housing Growth – Historical and Forecast, 2001 to 2041



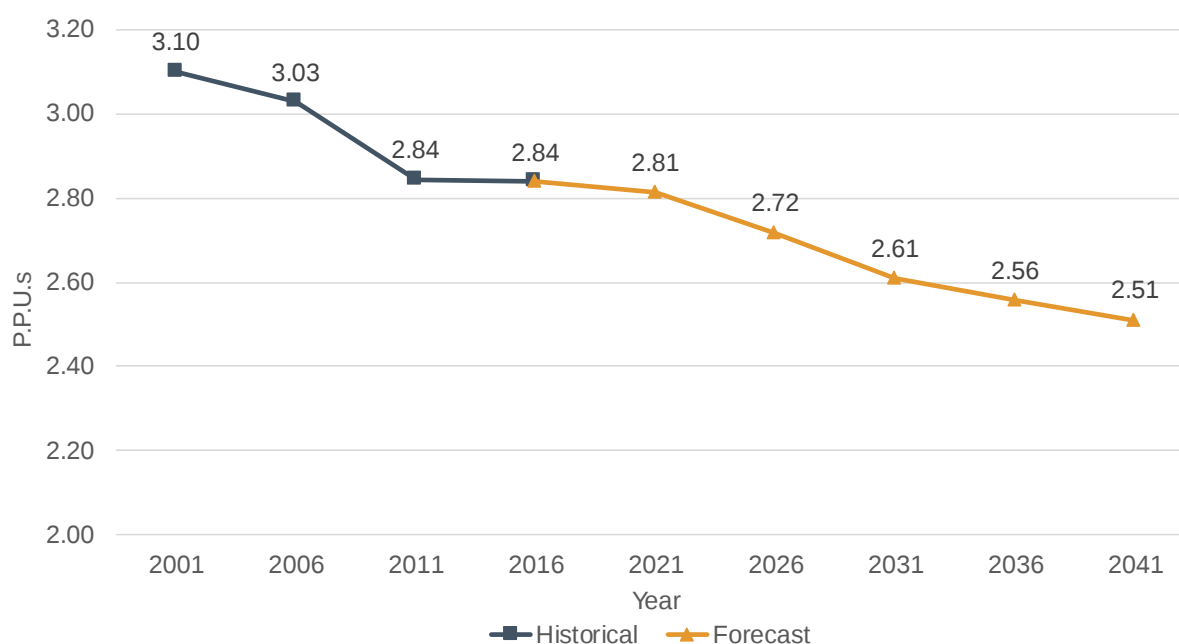
Source: Statistics Canada Census, 2001 to 2016. Forecast by Watson & Associates Economists Ltd., 2020.

Figure 5-5 summarizes anticipated trends in long-term housing occupancy, or average persons per unit (P.P.U.), for the Township within the 2016 to 2041 forecast period. Key observations include:



- Between 2001 and 2016, the average P.P.U. for the Township declined from 3.10 to 2.84; and
- Over the forecast period, the average P.P.U. for the Township is anticipated to continue to gradually decline from 2.84 in 2016 to 2.51 in 2041, largely as a result of the aging of the Township's population and a gradual shift towards medium- and high-density forms of housing.

Figure 5-5
Township of Cavan Monaghan
Historical and Forecast Persons Per Unit (P.P.U.), 2001 to 2041



Source: Statistics Canada Census and Demography Division, 2001 to 2016. Forecast (2021 to 2041) estimated by Watson & Associates Economists Ltd., 2019.

Note: Figure includes net Census undercount estimated at 2.5%.

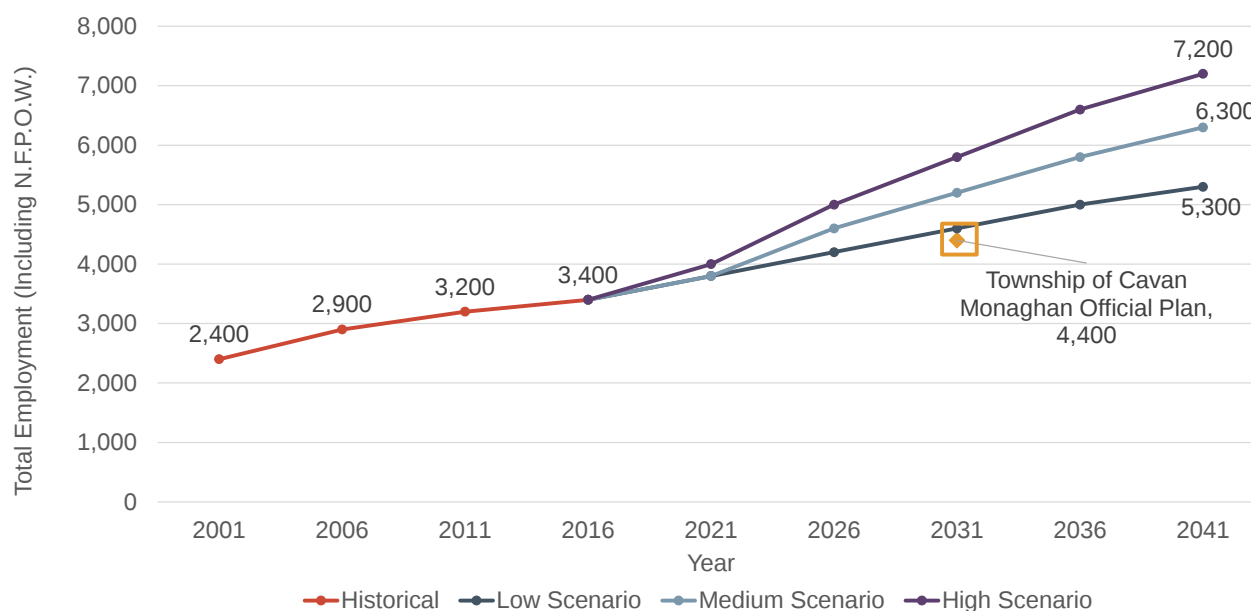


5.2 Long-Term Township of Cavan Monaghan Employment Forecast, 2016 to 2041

5.2.1 Long-Term Employment Forecast Scenarios, 2016 to 2041

Three long-term employment growth scenarios have been developed for the Township for the 2016 to 2041 forecast period, as shown in Figure 5-6.¹ A range of assumptions were considered when generating these scenarios, such as forecast changes in the employment activity rate (ratio of jobs to population), macro-economic trends in the export-based employment sector, and growth in population-related employment largely driven by continued residential development in the Millbrook Settlement Area.

Figure 5-6
Township of Cavan Monaghan
Long-Term Total Employment Forecast Scenarios, 2016 to 2041



Source: 2001 to 2016 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2019.
Note: Population includes work at home and no fixed place of work employment.

¹ Including no fixed place of work (N.F.P.O.W.). No fixed place of work employment represents persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.



Township of Cavan Monaghan Total Employment Growth					
	2016	2041	2016 to 2041	Annual Growth	Annual Growth Rate
High Scenario		7,200	3,800	150	3.0%
Medium Scenario	3,400	6,300	2,900	120	2.5%
Low Scenario		5,300	1,900	80	1.8%

Low Employment Forecast Scenario

This scenario assumes that the Township employment base will grow at a rate of 1.8% per year. Under this scenario, the employment base is forecast to increase modestly between 2016 and 2041 by approximately 1,900 jobs, from 3,400 to 5,300.

Medium Employment Forecast Scenario

In this scenario, employment in the Township is expected to increase at a rate of 2.5% annually between 2016 and 2041. Under this scenario, the Cavan Monaghan employment base is expected to increase by approximately 2,900 jobs by 2041.

High Employment Scenario (Reference Scenario)

Under this reference scenario, Cavan Monaghan employment is forecast to grow at an average annual rate of roughly 3.0%. This represents an average annual growth rate that is moderately higher than the most recent 15-year historical period of 2.3% annually. In this scenario, the Township's employment base is forecast to increase by approximately 3,800 jobs, increasing from 3,400 in 2016 to 7,200 by 2041.

5.2.2 Township of Cavan Monaghan Employment Forecast, 2016 to 2041: Reference Scenario

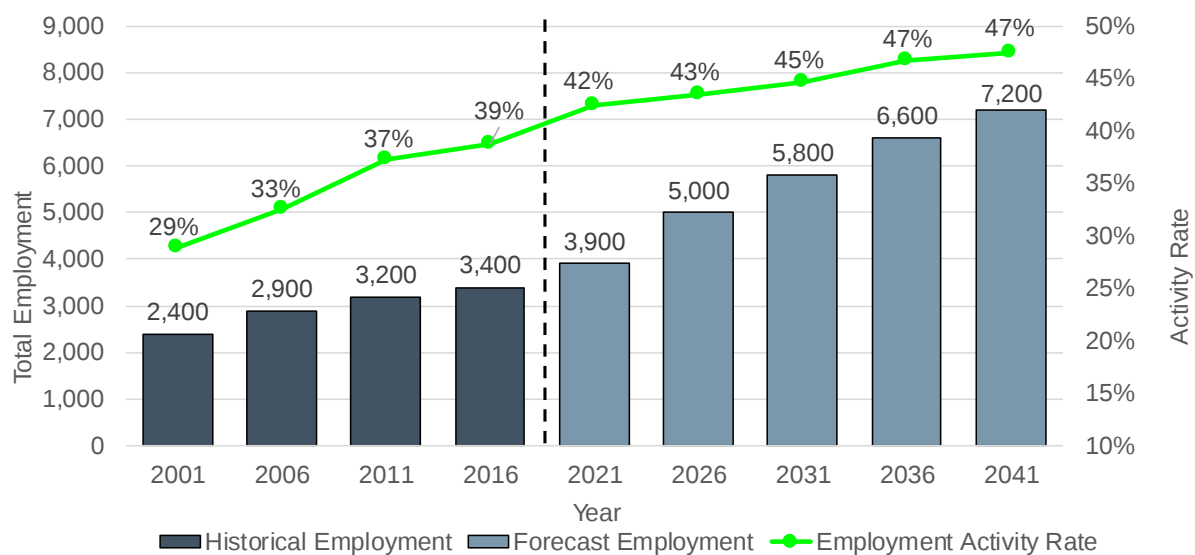
In accordance with historical employment and labour force growth trends, the High Employment Scenario represents the “most likely” or reference employment growth scenario for Cavan Monaghan. As shown in Figure 5-7, the Township's employment activity rate is anticipated to continue to increase from 39% in 2016 to 47% by 2041.¹ This steady increase is anticipated to be largely driven by local employment opportunities within the local and regional export-based employment sectors (e.g. transportation, wholesale trade, construction, small-scale manufacturing and agri-

¹ An activity rate is the ratio of jobs to population.



business) as well as population-related employment sectors such as retail, accommodation and food, professional, scientific and technical scientific services and health care. Forecast job growth is also anticipated to be accommodated through home occupations, home-based businesses and off-site employment.

Figure 5-7
Township of Cavan Monaghan
Historical and Forecast Employment Forecast, 2001 to 2041



Source: 2001 to 2016 from Statistics Canada place of work data including work at home and no fixed place of work.

Forecast by Watson & Associates Economists Ltd., 2020.

Note: Numbers have been rounded.

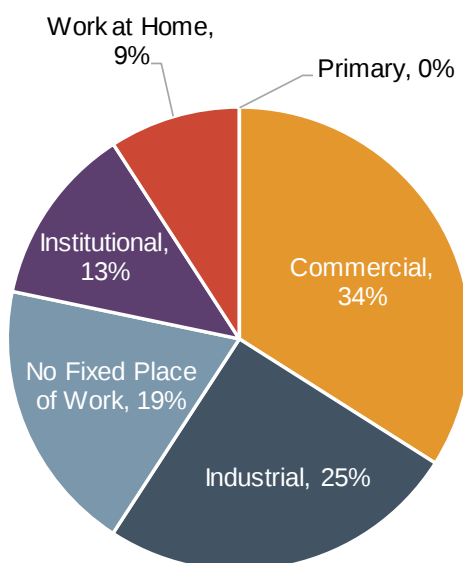
Figure 5-8 displays the share of growth by industry during the 2016 to 2041 forecast period. Land based commercial, industrial and institutional employment sectors are anticipated to account for approximately 72% of employment growth over the forecast period. No fixed place of work¹ and work at home employment categories are forecast to comprise the remaining 28% of employment growth. Employment in the primary sector (i.e. agriculture and other resource-based employment) has not experienced growth from 2006 to 2016 and this trend is anticipated to continue over the forecast period. To accommodate future growth in the agricultural sector, there is a need to facilitate new development, as well as the expansion of existing businesses that support

¹ No fixed place of work employment represents persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.



the agricultural economy. Agri-business and food processing provide an opportunity to deepen agricultural activity and increase productivity of the agricultural industry by providing value-add products and services. The agriculture and agri-food system encompass several industries, including the farm input and service supplier industries, primary agriculture, food and beverage processing, food distribution, retail, wholesale and food service industries.

Figure 5-8
Township of Cavan Monaghan
Share of Employment Growth, 2016 to 2041



Source: Forecast by Watson & Associates Economists Ltd., 2019.



Chapter 6

Population, Housing, and Employment Growth Allocations in the Millbrook Urban Settlement Area, 2019 to 2041

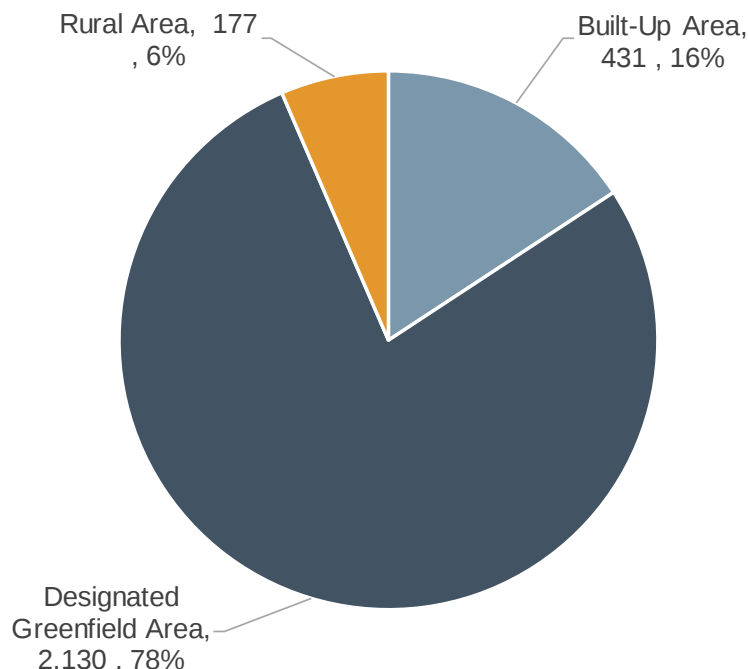


6. Population, Housing, and Employment Growth Allocations in the Millbrook Urban Settlement Area, 2019 to 2041

6.1 Population and Housing Growth Allocations in the Millbrook Urban Settlement Area, 2019 to 2041

Figure 6-1 summarizes the residential growth allocations between the B.U.A. and the D.G.A. of the Millbrook Urban Settlement Area, and the Rural Area of the Township, based on the High Population Growth Scenario. Over the 2019 to 2041 forecast period, approximately 94% of the Township's forecast household growth from 2019 to 2041 is allocated to Millbrook, with the remaining 6% allocated to the Rural Area. This is consistent with the Township's existing O.P. policies which require that most of the Township's growth be directed to the Millbrook Urban Settlement Area.

Figure 6-1
Allocation of Township of Cavan Monaghan Household Growth Forecast, 2019 to 2041

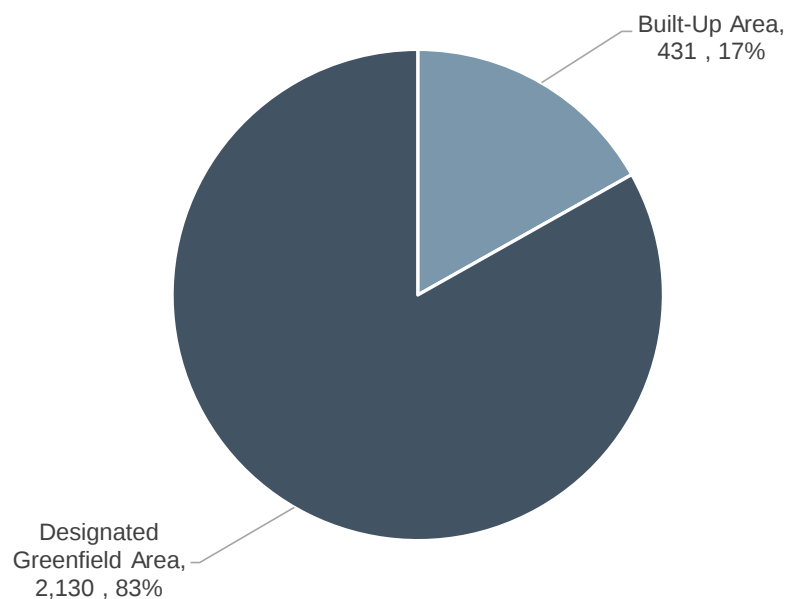


Source: Derived by Watson & Associates Economists Ltd, 2020. Note that numbers may not add precisely due to rounding.



Within the Millbrook Urban Settlement Area, most of the forecast household growth between 2019 to 2041 is allocated to the D.G.A. (83%) as shown in Figure 6-2.

Figure 6-2
Township of Cavan Monaghan Household Forecast in Millbrook, 2019 to 2041

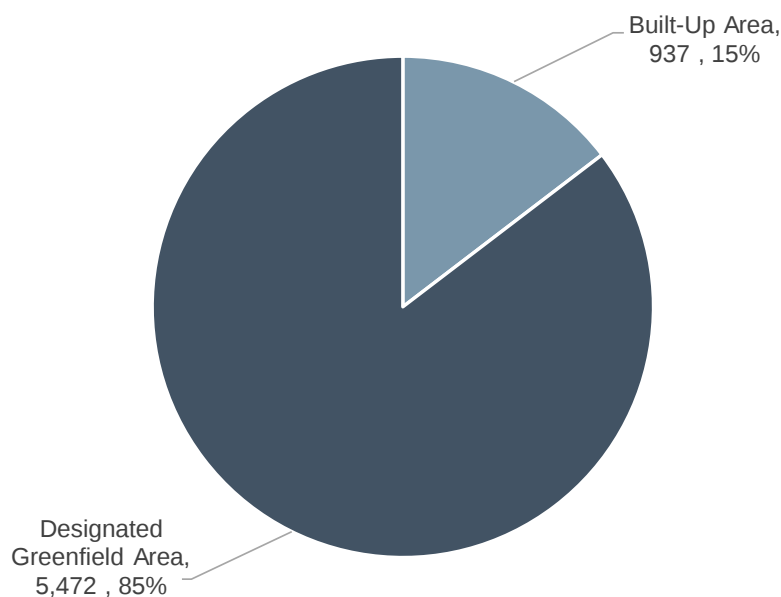


Source: Derived by Watson & Associates Economists Ltd, 2020. Note that numbers may not add precisely due to rounding.

Figure 6-3 summarizes the population growth forecast allocation in the Millbrook Urban Settlement Area over the 2019 to 2041 period.



Figure 6-3
Population in New Units in Millbrook, 2019 to 2041



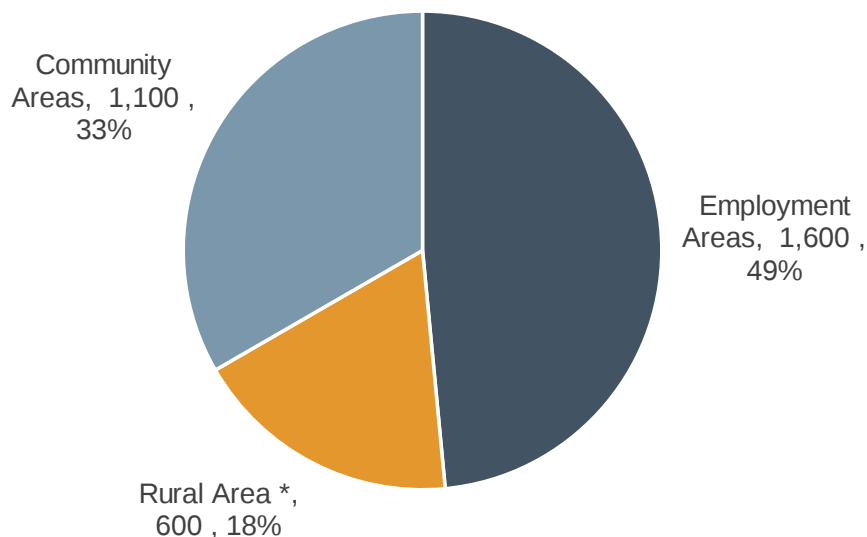
Source: Derived by Watson & Associates Economists Ltd, 2020. Note that numbers may not add precisely due to rounding.

6.2 Employment Growth Allocations in the Millbrook Urban Settlement Area, 2019 to 2041

As summarized in Figure 6-4, Employment Areas in the Township are forecast to accommodate approximately 1,600 employees over the 2019 to 2041 period. This represents approximately 50% of the Township's total employment growth over that period. It is assumed that 65% of the Township-wide industrial employment growth will occur in Employment Areas, while 22% of the Township's commercial/population-related and major office employment will be accommodated in Employment Areas. It is further assumed that 69% of the Township's institutional employment growth will occur in Employment Areas.



Figure 6-4
Township of Cavan Monaghan
Employment Growth Distribution by Location, 2019 to 2041



Source: Derived by Watson & Associates Economists Ltd., 2019.

Note: Numbers may not add precisely due to rounding.

* The Rural Employment Areas surrounding Peterborough Airport are considered part of the Rural Area.

Figure 6-5 summarizes the employment forecast by sector and location from 2019 to 2041 within the Township (Appendix E provides further details in five-year increments from 2019 to 2041).

Figure 6-5
Township of Cavan Monaghan
Employment Growth by Sector and Location, 2019 to 2041

Employment Sector	Employment Growth (2019 - 2041)				Percent of Township Employment Growth on Employment Lands (2019 - 2041)
	Township-Wide	Employment Areas	Rural Area *	Community Areas	
Primary	-	-	-	-	0%
Industrial	1,411	917	494	-	65%
Commercial/Population-Related	1,342	295	67	980	22%
Institutional	492	339	10	143	69%
Total Employment Growth	3,245	1,600	600	1,100	49%
Share of Total Employment Growth		49%	18%	34%	

* The Rural Employment Areas surrounding Peterborough Airport is considered part of the Rural Area.

Source: Derived by Watson & Associates Economists Ltd., 2019.

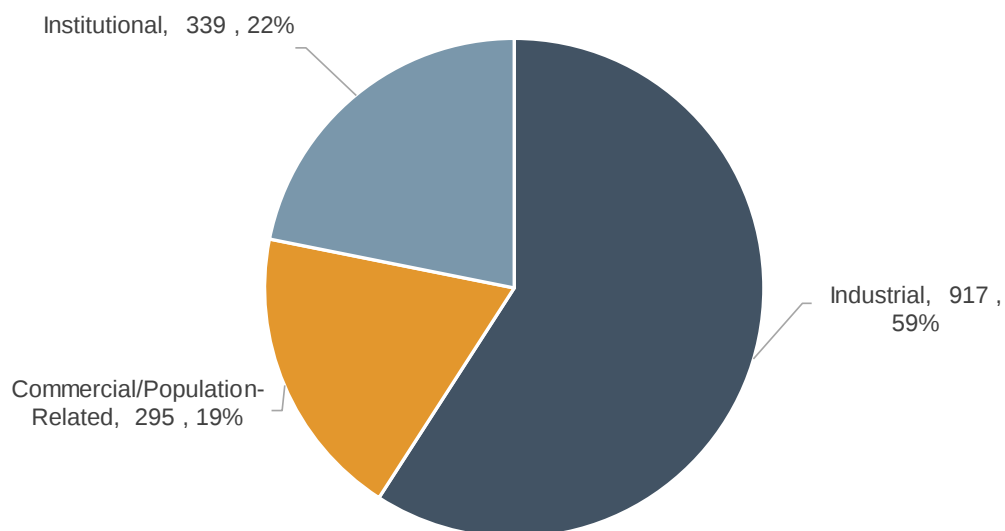
Note: Numbers may not add precisely due to rounding and Work at Home employment sector is not included.

Figure 6-6 summarizes the share of forecast employment growth in Employment Areas by sector between 2019 and 2041. The industrial sector represents most of the forecast



employment growth in Employment Areas, followed by institutional and commercial/population-related employment growth.

Figure 6-6
Township of Cavan Monaghan
Forecast Employment Growth on Employment Lands by Employment Sector,
2019 to 2041



Source: Derived by Watson & Associates Economists Ltd., 2019.

Note: Numbers may not add precisely due to rounding.



Chapter 7

Residential, Commercial, and Employment Land Demand and Needs Analysis, 2019 to 2041



7. Residential and Non-Residential Urban Needs Analysis, 2019 to 2041

This chapter summarizes the Township's anticipated land needs within the Millbrook Urban Settlement Area to the year 2041. This assessment builds on the population and employment growth forecast (High Growth Scenario) summarized in Chapter 6. Urban residential land needs are determined by assigning an average density to future urban growth in the D.G.A. Urban land needs are determined net of potential development that is anticipated within intensification areas. For residential lands, intensification includes all lands identified within the B.U.A., as defined by the Growth Plan, 2019.

7.1 Residential Land Needs, 2019 to 2041

Figure 7-1 summarizes the results of the residential density analysis that was undertaken for the D.G.A. of the Millbrook Urban Settlement Area. For the purposes of this analysis, average residential density was grouped into three categories: 1) developed residential lands; 2) vacant lands associated with active developments in registered or draft approved developments; and 3) remaining vacant D.G.A. lands. The latter two groups have been established because vacant lands that include approved (unbuilt) and draft approved development provide a greater degree of certainty with respect to average forecast residential density, while the remaining vacant D.G.A. lands provide greater opportunity to adjust average density levels.

As summarized in Figure 7-1, the average residential density on active vacant D.G.A. lands (category 2) in Millbrook is higher than developed D.G.A. lands (category 1). The average density on remaining vacant D.G.A. lands is anticipated to further increase due to a combination of smaller average lot sizes related to low-density housing as well as a greater share of medium- and high-density development. Overall, the total D.G.A. residential density is anticipated to average 31 people per hectare by 2041.



Figure 7-1
Residential Density Analysis of Millbrook D.G.A.

	Residential Density (people per ha)
Developed Residential Lands in Millbrook D.G.A. ¹	23
Developed, Registered and Draft Approved Residential Lands in Millbrook D.G.A. ²	30
Remaining Vacant Residential Lands in Millbrook D.G.A.	36
Overall Residential Density in D.G.A. to 2041	31

¹ Residential density assumption based on a desktop review and survey of existing residential development in Millbrook D.G.A.

² Housing supply opportunities in the D.G.A. that are in the development approvals process and either have a "registered" or "draft approved" status.

Source: Derived by Watson & Associates Economists Ltd., 2019. Note that density is defined in accordance with section 2.2.7.3 of the Growth Plan, 2019.

Based on an average residential density of 36 people per ha on remaining vacant D.G.A. lands, a total of 178 ha (440 acres) is required to accommodate additional population growth in the Millbrook Urban Settlement Area to the year 2041, as shown in Figure 7-2.



Figure 7-2
Township of Cavan Monaghan
Forecast Residential Land Demand, 2019 to 2041

Designated Greenfield Area - Residential		Urban Area Total
Population at Year 2041	A	6,329
Residential Land Demand at 2041 (ha)	B	178
Residential Density (people per ha)	$C = A / B$	36

Source: Derived by Watson & Associates Economists Ltd., 2019.

Figure 7-3 summarizes forecast residential land needs to 2041. Key observations include:

- Over the 2019 to 2041 forecast period, the Township is anticipated to require an additional 178 ha (440 acres) of residential lands to accommodate forecast residential growth in Millbrook;
- The total vacant residential land supply in the Millbrook D.G.A. is approximately 129 ha (319 acres). As summarized in Figure 7-6, the demand for residential lands over the next 22 years exceeds the supply of total vacant residential lands in the Millbrook D.G.A.;
- To accommodate forecast residential growth on residential lands to the year 2041, approximately 49 ha of additional designated residential lands will be required; and
- Further, working with the County of Peterborough, the Township should pursue adding additional designated residential lands to the Millbrook Urban Settlement Area.



Figure 7-3
Township of Cavan Monaghan
Residential Land Needs, 2019 to 2041

Designated Greenfield Area - Residential		Urban Area Total
Population at Year 2041	A	6,329
Residential Land Demand at 2041 (ha)	B	178
Residential Density (people per ha)	$C = A / B$	36
Total Residential Lands in the D.G.A. Community Area (ha)	D	129
Residential Surplus/Shortfall at 2041 (ha)	$E = D - B$	(49)

Source: Derived by Watson & Associates Economists Ltd., 2019.

7.2 Commercial Land Demand and Needs, 2019 to 2041

The Millbrook Urban Settlement Area has approximately 103,000 sq.ft. of occupied commercial space (office and retail). The ratio of commercial space per resident is approximately 47 sq.ft. which is similar to other markets of comparable size.

In total, approximately 56% of the commercial space accommodates retail and food services type of uses¹, while over a third of the commercial space accommodates services². In addition, approximately 8% of the commercial space accommodates institutional uses (medical, health services and dental). The composition of the

¹ Includes grocery stores, convenience stores and food services (restaurants and establishments that sell food and drink items).

² Services includes commercial establishments that offer non-tangible services, including travel agencies, banks, real estate and insurance agencies, hair salons, automotive repair.



commercial base includes a large services component compared to other urban areas of comparable size.

While the retail vacancy rate is 6%, which indicates that the market has a healthy building vacancy rate (5% to 10% is considered a balanced market), it is important to recognize that Millbrook does not have a wide range of retail options to attract commercial businesses. Retail space is primarily concentrated in the downtown area in older buildings.

Figure 7-4 summarizes forecast commercial land needs to 2041. Key observations are:

- Within the 2019 to 2041 forecast period, the Township is anticipated to require an additional 8 ha (20 acres) of commercial lands to accommodate forecast commercial growth in Millbrook;
- The total supply of vacant commercial lands in the Millbrook D.G.A. is approximately 3 ha (7 acres).¹ As summarized in Figure 7-4, the demand for commercial lands over the next 22 years exceeds the supply of vacant commercial lands in the Millbrook D.G.A.;
- To accommodate forecast commercial growth on residential lands to the year 2041, approximately 5 ha (12 acres) of additional designated commercial lands will be required; and
- Further, working with the County of Peterborough, the Township should pursue adding additional designated commercial lands to the Millbrook Urban Settlement Area.

¹ There are approximately 4 ha of vacant designated commercial lands; however, there is only 1 parcel measuring larger than 1 ha. All remaining parcels are too small to accommodate a range of commercial uses and are considered infill lots. The analysis assumes the infill lots will accommodate 10% of the commercial G.F.A. development over the forecast horizon and result in the absorption of approximately 50% of the small infill lots by 2041.



Figure 7-4
Township of Cavan Monaghan
Commercial Land Needs, 2019 to 2041

Growth Period	Commercial Demand on Designated Commercial Lands					Available Vacant Commercial Land Supply (net ha) ² (at least 1 ha)	Surplus/Shortfall, (ha)
	Total Commercial G.F.A. Increment, sq.ft.	G.F.A. sq.ft. Accommodated by Intensification ¹	G.F.A. sq.ft. Adjusted for Intensification	Annual G.F.A. Demand	Land Requirement, (ha)		
2019 - 2041	226,000	23,000	203,000	10,000	8	3	(5)

¹ Assumes 10% of commercial development will be accommodated on small infill sites of less than 1 ha. There are approximately 8 vacant small infill sites totalling 1.7 ha (approximately 4 acres).

² Total available commercial lands measuring at least 1 ha.

Source: Derived by Watson & Associates Economists Ltd., 2019.

7.3 Employment Land Needs, 2019 to 2041

Future urban land needs associated with Employment Areas have been determined through the following steps:

- **Step 1: Forecast Employment Density in Urban Employment Areas**

An environmental scan was conducted regarding existing employment densities in Employment Areas across Central Ontario comparable to the Township.¹ Based on this environmental scan, it was determined that an average employment density of 25 jobs per ha (10 jobs per acre) is appropriate over the long-term forecast period. It is noted that structural changes in the economy are changing the character of economic activities in Employment Areas and impacting employment density. Recent trends include: 1) increasing demand for warehousing/logistics and transportation uses for the growing “goods movement” sectors which tend to be of lower employment density; and 2) increased automation in the manufacturing sector as domestic manufacturers focus their efforts on increased efficiency and competitiveness through automation.

¹ This included the Township of Centre-Wellington, the Town of Innisfil, and Haldimand County.



- **Step 2: Determine Employment Land Demand in the Township's Urban Employment Areas**

Figure 7-5 summarizes forecast demand for Urban Employment Areas from 2019 to 2041. Key observations include:

- Over the planning horizon, an estimated 10% of the total employment growth in Employment Areas is expected to be accommodated through intensification. It is anticipated that most of this intensification will be accommodated through infill, redevelopment and expansion of existing developed Employment Areas in the Millbrook Urban Settlement Area;
- The Township is forecast to absorb an annual average of approximately 3 ha per year (6 acre); and
- Over the planning horizon, urban land demand in Employment Areas is forecast to total 56 ha.

Figure 7-5
Township of Cavan Monaghan Forecast Urban Land Demand in Employment Areas, 2019 to 2041

Growth Period	Total Employment on Urban Employment Lands	Intensification on Urban Employment Lands ¹	Total Employment on Employment Lands Adjusted for Intensification	Employment Density (jobs per ha)	Total Urban Land Demand (ha)	Annual Urban Employment Land Absorption (ha)
2019 - 2041	1,556	156	1,400	25	56	3

¹ Assumes 10% of employment will be accommodated through intensification.

Source: Derived by Watson & Associates Economists Ltd., 2019.

Note may not add precisely due to rounding.

- **Step 3: Compare Forecast Urban Land Demand Against Available Supply in Employment Areas**

Figure 7-6 summarizes forecast employment land needs to 2041. Key observations include:

- Over the 2019 to 2041 forecast period, the Township is anticipated to require an additional 56 ha (138 acre) of land in urban Employment Areas to accommodate forecast employment growth in Millbrook (adjusted for intensification);



- As previously discussed in section 4.2, the Township has a vacant designated Employment Area land supply of 27 ha (67 acres). As summarized in Figure 7-6, the demand for Employment Areas over the next 22 years exceeds the supply of vacant Employment Areas lands;
- To accommodate forecast employment growth on Employment Areas to the year 2041, approximately 30 ha (74 acres) of additional designated Employment Areas will be required; and
- Further, working with the County of Peterborough, the Township should pursue adding additional designated Employment Areas to the Millbrook Urban Settlement Area.

Figure 7-6
Township of Cavan Monaghan
Employment Land Needs, 2019 to 2041

Designated Greenfield Area - Employment		Urban Area Total
Employment at 2041	A	1,400
Non-Residential Land Demand at 2041 (ha)	B	56
Non-Residential Density (jobs per ha)	$C = A / B$	25
Total Non-Residential Lands in the D.G.A. Community Area (ha)	D	27
Non-Residential Surplus/Shortfall at 2041 (ha)	$E = D - B$	(29)

Source: Derived by Watson & Associates Economists Ltd., 2019.



Chapter 8

Location Options for Future Urban Expansion



8. Location Options for Future Urban Expansion

Broad location options for future urban land expansion in Millbrook to the year 2041 were identified by working with Township staff and the Technical Advisory Committee (T.A.C.). This chapter presents the overall approach that was undertaken and describes the location options to accommodate growth.

8.1 Approach to Assessing Location Options for Urban Land Expansion

The following were considered while working with staff and T.A.C. to assess broad location options for urban land expansion in Millbrook:

- The presence of environmental and development constraints and their impact on developable potential;
- Servicing options, with the benefit that the Township's water and wastewater allocation policies were being updated during the time of the study. This is further discussed in section 8.3; and
- Overall land-use structure, urban form and logical extensions of Millbrook that also limited and/or mitigated land-use incompatibilities.

While this G.M.S. identifies broad location options for future urban expansion, additional technical studies related to land-use planning, servicing, and agricultural impacts, as outlined in the Growth Plan, 2019 and 2020 P.P.S., are required by Peterborough County and the Township of Cavan Monaghan.

8.2 Overview of Broad Location Options for Future Urban Expansion

In collaboration with Township staff and T.A.C., this study recommends that residential and commercial land needs (i.e. Community Land need) could be potentially addressed by expanding Millbrook's settlement boundary northwestward towards and north of Fallis Line, and redeveloping the former Millbrook Correctional Facility, which is located on the western edge of Millbrook (Figure 8-1). These location options not only have limited environmental constraints, but they are also surrounded by residential and



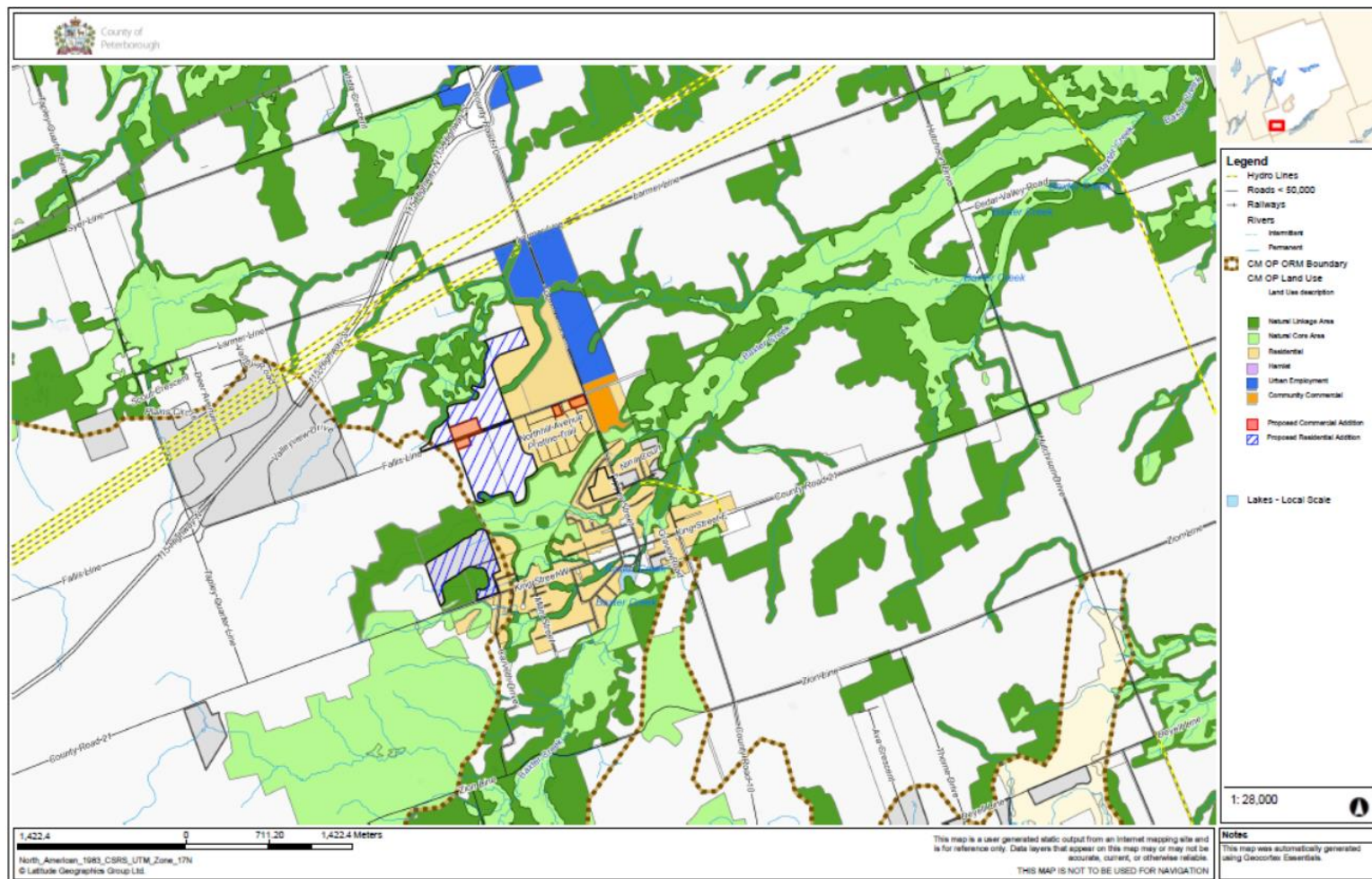
institutional uses, making them less likely to impose land-use incompatibility issues between existing and future land uses.

In assessing broad location options to accommodate Employment Area needs, a governing principle was to improve the probability of existing Employment Areas within Millbrook being serviced in the near term. As described in earlier sections of this report, one of the Township's challenges, and therefore priorities, is to provide serviced Employment Areas. It was found that Millbrook's settlement boundary could be expanded north just past Larmer Line and towards Highway 115, and then east from the southern edge of the existing Urban Employment Area and along Fallis Line, in order to address Millbrook's 30 ha Employment Area land needs. This location option would allow the Township's existing Urban Employment Areas to remain intact and improve the probability of existing and future Employment Areas to be serviced in the near term.

As previously discussed, it is suggested that the Township undergo additional technical studies, such as land use, servicing, and agricultural impact studies, as outlined by the requirements of the Growth Plan, 2019 and the 2020 P.P.S. in order to assess impacts and determine the exact locations for future urban expansion. As a future exercise, a Secondary Plan could be undertaken by the Township to provide more specific direction to issues related to servicing, land use, transportation access, and urban design guidelines, for example. This also could help mitigate potential land-use incompatibility issues with the growing urban area of Millbrook.



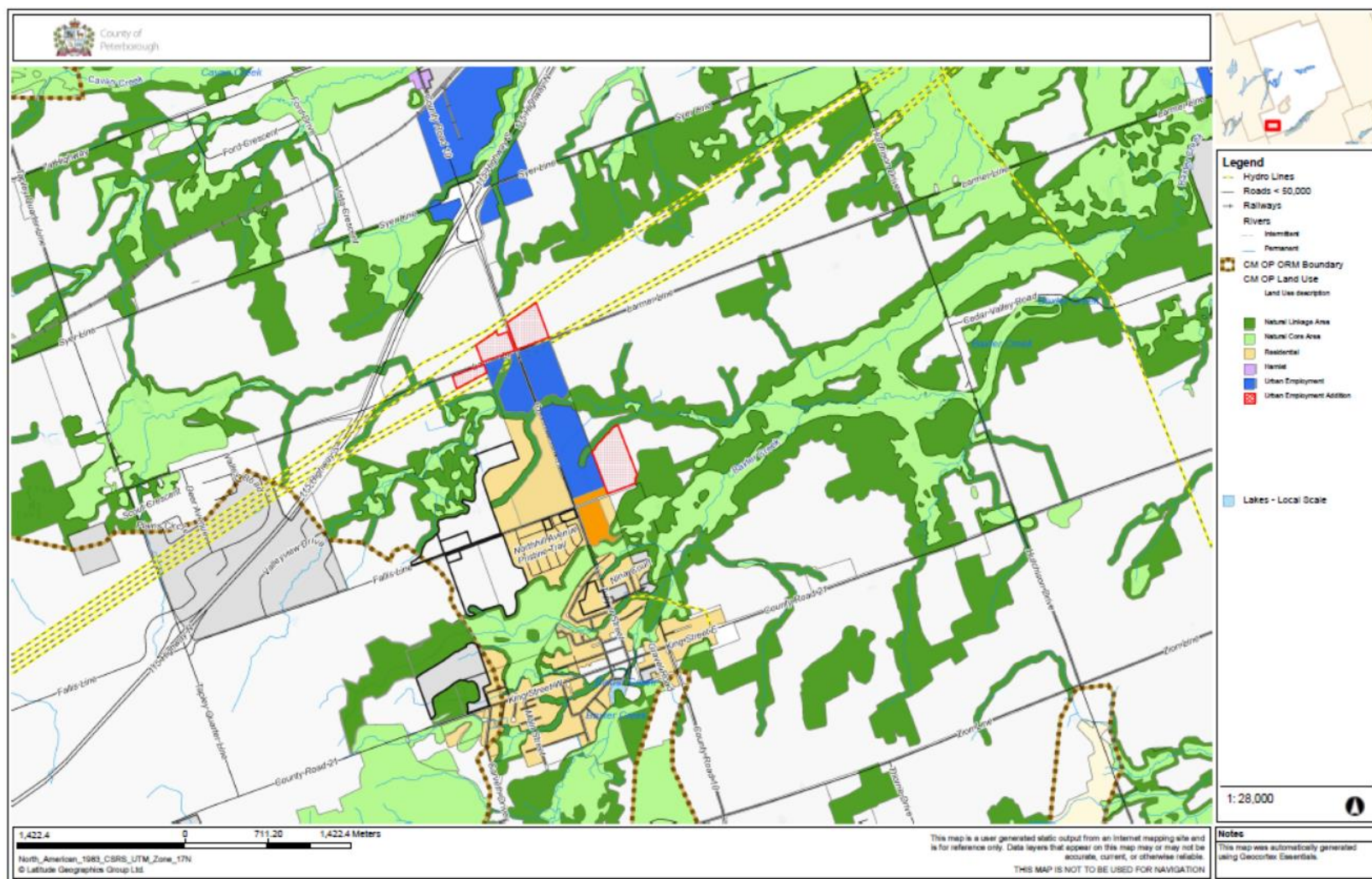
Figure 8-1
Broad Location Options for the Township of Cavan Monaghan to Address Residential and Commercial Land Needs to the Year 2041



Source: Mapping data provided by the Township of Cavan Monaghan, 2020.



Figure 8-2
Broad Location Options for the Township of Cavan Monaghan to Address Employment Land Needs to the Year 2041



Source: Mapping data provided by the Township of Cavan Monaghan, 2020.



8.3 Servicing Considerations for Future Urban Expansion

Township staff and T.A.C. provided insight on existing servicing conditions and future servicing directions throughout the course of assessing these broad location options for future urban expansion. As such, the broad location options presented in the previous section consider servicing potential at a high level. To further inform the exact location and nature of future urban expansion to accommodate Community and Employment Land Area land needs, Township staff and T.A.C. have recommended that a master servicing study will need to be undertaken. This would further inform how to service the broad location options (e.g. through maximizing existing facilities, expanding the present water and wastewater plant, and/or using stand-alone systems) and gain approval.¹ Township staff and T.A.C. have indicated through a high-level assessment that stormwater management and storm servicing would be provided on a site-specific basis.

The Township is currently undertaking a study with Cambium Inc. to update capacities of the Township's water and wastewater plant, with plans that this study will be updated on an annual basis. The update has recommended a revised servicing policy and that the Township continue preserving a 20% allocation of servicing capacity for future urban Employment Areas.

¹ Funds are currently budgeted in the Township's 2020 budget to undertake this servicing study. The funds are recoverable from the Township's development charges.



Chapter 9

Rural Employment Land Review



9. Rural Employment Land Review

The results of this G.M.S. have concluded that there is no foreseeable need for additional Employment Area expansion in the Township's Rural Area. In response to the Township's O.P. priorities to promote and market its rural Employment Areas, however, a review of the developability and marketability of the Township's Rural Employment Areas has been undertaken. This review has resulted in a series of recommendations to remove as well as add to the Township's Rural Employment Area designation, subject to the results of additional study in accordance with the 2020 P.P.S. These recommendations would not increase the Township's net supply of designated Rural Employment Areas; however, they are intended to improve the Township's competitive position with respect to the future development of these areas.¹

9.1 Approach to Reviewing Rural Employment Areas

This Rural Employment Land review was conducted with Township staff and T.AC. and considered the following at a high level:

- The presence of environmental constraints in Rural Employment Lands and impact on developable land potential;
- The overall configuration and topography of Rural Employment Areas and impact on developable land potential;
- The accessibility of Rural Employment Areas to the County road network, Highway 115, and other goods movement infrastructure (e.g. railway and Peterborough Airport);
- Potential servicing opportunities with the City of Peterborough that could be available to the Township's Rural Employment Areas; and

¹ The series of recommended removals and additions would need to undergo detailed review and technical study to refine their land areas based on land use, infrastructure, environmental, and agricultural impacts, for example, and such that the total land area of existing designated Rural Employment Areas remains the same. It is also recognized that Rural Employment Areas other than those identified in this study may be considered for addition and removal upon detailed review and through planning approvals processes



- Proximity of Rural Employment Areas to existing settlement areas in an effort to limit land-use incompatibilities between employment uses and sensitive uses (e.g. residential and institutional uses).

In addition to considering the above, the importance and need for protecting the Township's Rural Employment Areas were also taken into account throughout the course of this review.

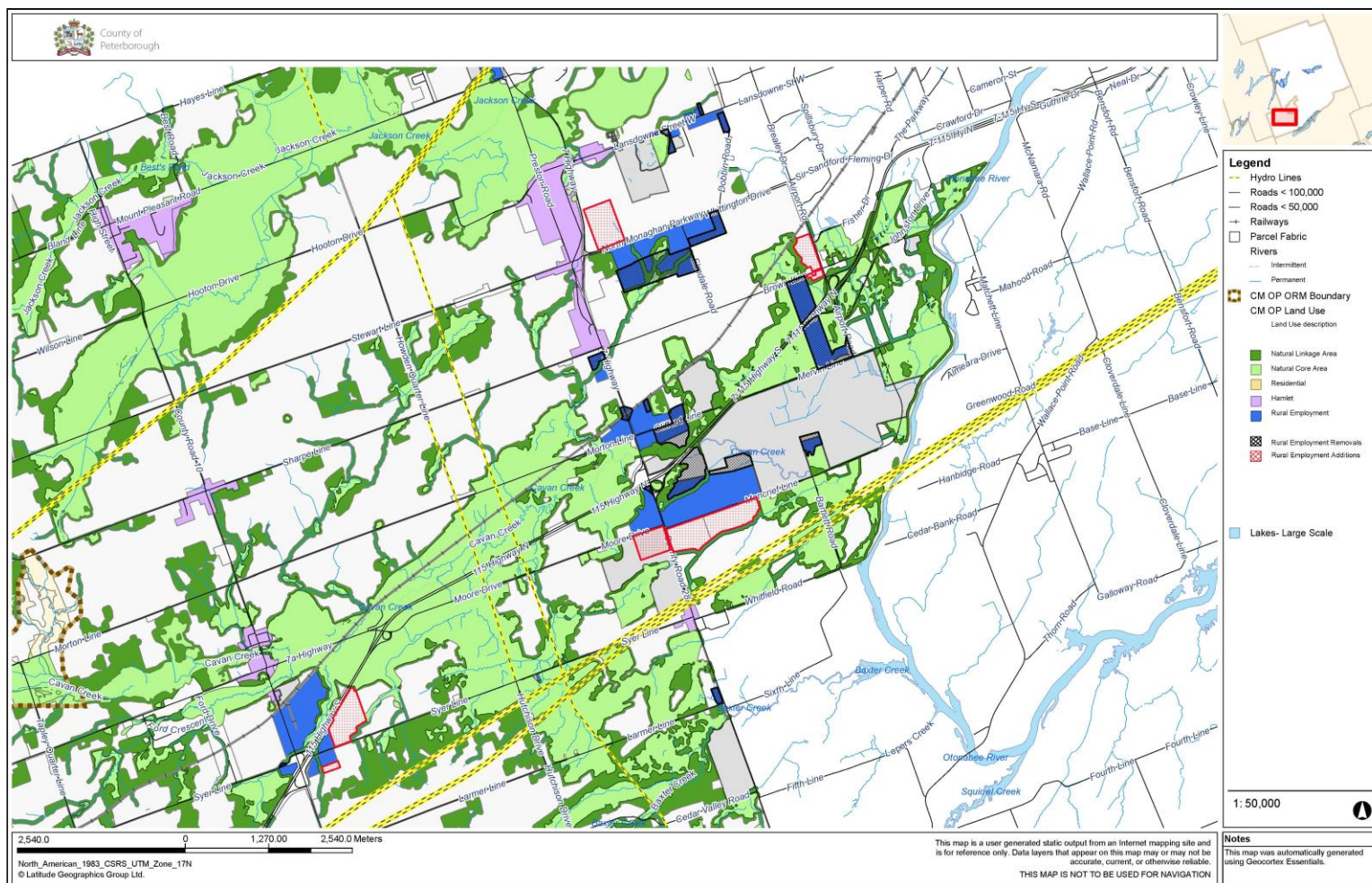
9.2 Preliminary Recommendations Regarding Rural Employment Land Removals and Additions

The preliminary recommendations provided herein have been considered within the context of the Township of Cavan Monaghan O.P, which provides policy direction and long-term vision for its Rural Employment Areas. In total, four distinct Rural Employment Areas are identified within the Township's O.P., including:

1. Rural Employment Area Surrounding the Peterborough Airport;
2. Commercial Entertainment Employment Area north of the Fraserville Hamlet;
3. Rural Employment Area along the North Monaghan Parkway; and
4. Rural Employment Area at the Highway 115 and County Road 10 interchange (Figure 9-1).



Figure 9-1
Township of Cavan Monaghan
Preliminary Rural Employment Land Additions and Removals



Source: Mapping provided by the Township of Cavan Monaghan, 2020.



9.2.1 Rural Employment Area Surrounding the Peterborough Airport

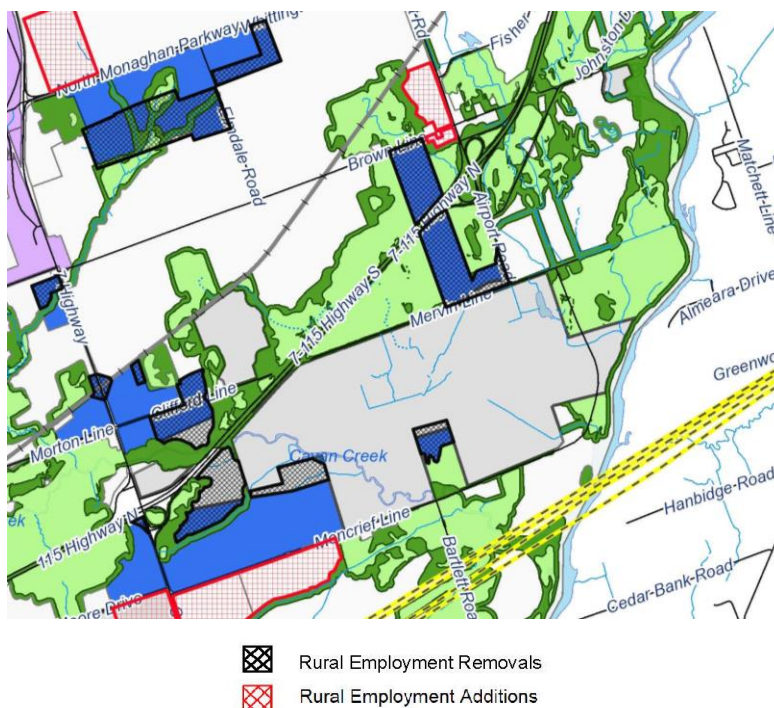
The existing Rural Employment Area designations were adopted into the Township's O.P. upon the amalgamation of the Township in the late 1990s. Over time, the presence of provincially and locally significant wetlands in addition to unevaluated wetlands on Rural Employment Areas became more apparent and protected through planning policy. This has limited the developable potential and marketability of these Rural Employment Areas, and has significantly constrained development interests and activity occurring on these lands over time.

Through this Rural Employment Area review, it is suggested that most of the Rural Employment Areas adjacent to the Peterborough Airport consisting of significant environmental constraints be removed. In replacement of these lands to be removed, it is suggested that Rural Employment Area additions be directed to land at Brown Line and Airport Road and adjacent to the existing Commercial Entertainment designation. This is further discussed in the next section, which provides a closer perspective on the proposed Rural Employment Area removals and additions in this area provides a closer perspective on the proposed Rural Employment Area removals and additions in this area.

Figure 9-2 provides a closer perspective on the proposed Rural Employment Area removals and additions in this area.



Figure 9-2
Township of Cavan Monaghan
Preliminary Rural Employment Land Additions and Removals
Surrounding the Peterborough Airport



Source: Mapping provided by the Township of Cavan Monaghan, 2020.

9.2.2 Commercial Entertainment Employment Area North of the Fraserville Hamlet

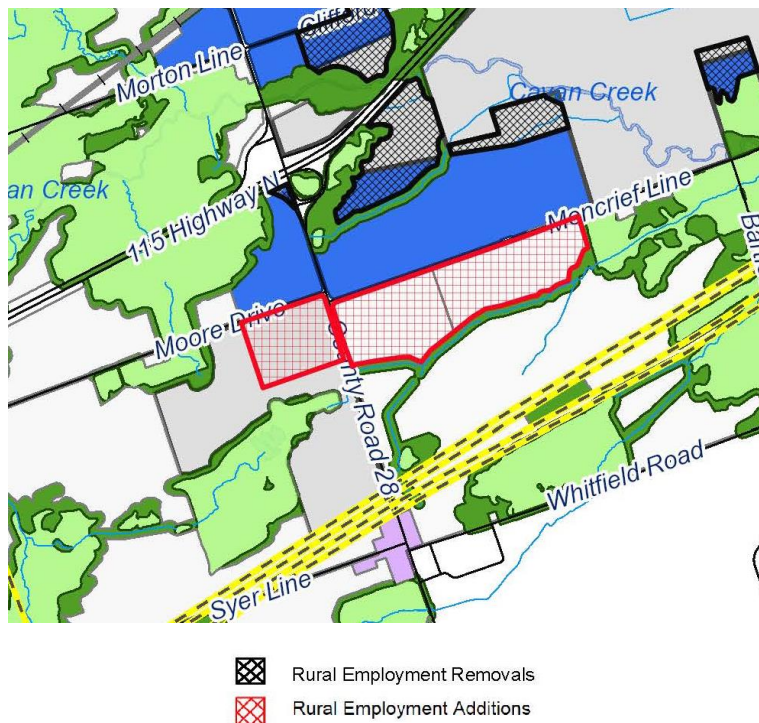
The existing Commercial Entertainment designation north of Fraserville recognizes the existing Shoreline Slots commercial entertainment complex and, as discussed in section 2.3, this area intends to encourage a clustering of commercial entertainment uses and supportive uses within this location.

The Rural Employment Land addition is proposed to the east of this existing Commercial Entertainment designation due to its proximity to the Peterborough Airport, relatively flat topography and limited environmental constraints for development, as well as accessibility to the County road network, Highway 115, and railway. Moreover, the proposed addition provides opportunities to build on the existing commercial entertainment complex, redevelop, and potentially share some servicing with the City of



Peterborough. Figure 9-3 provides a closer perspective on the preliminary Rural Employment Land additions in this area.

Figure 9-3
Township of Cavan Monaghan
Preliminary Rural Employment Land Addition Adjacent to the Existing Commercial
Entertainment Designation



Source: Mapping provided by the Township of Cavan Monaghan, 2020.

9.2.3 Rural Employment Area Along North Monaghan Parkway

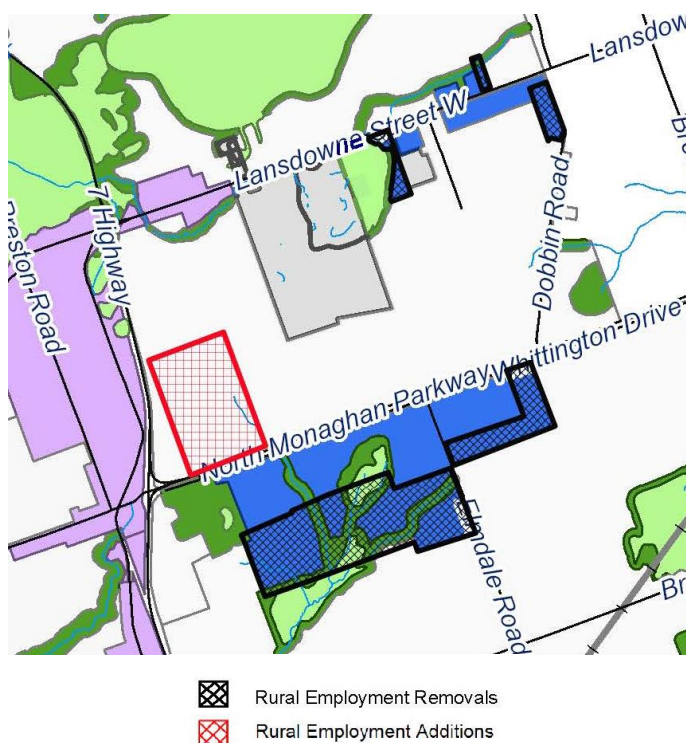
The Rural Employment Area along the North Monaghan Parkway is situated adjacent to the Five Mile Turn Hamlet, has limited environmental constraints, and is accessible to Highway 115, the Peterborough Airport, and the City of Peterborough.

The proposed removals that are suggested for the Rural Employment Lands have environmental constraints and offer little to no frontage onto the North Monaghan Parkway. The proposed addition is suggested to front onto North Monaghan Parkway. As previously indicated, the proposed Rural Employment Land addition and removals aim to highlight the advantages of Rural Employment Lands in this area, and therefore improve their developable potential and marketability. Figure 9-4 provides a closer



perspective on the preliminary Rural Employment Land addition and removals in this area.

Figure 9-4
Township of Cavan Monaghan
Preliminary Rural Employment Land Additions and Removals
in the North Monaghan Employment Area



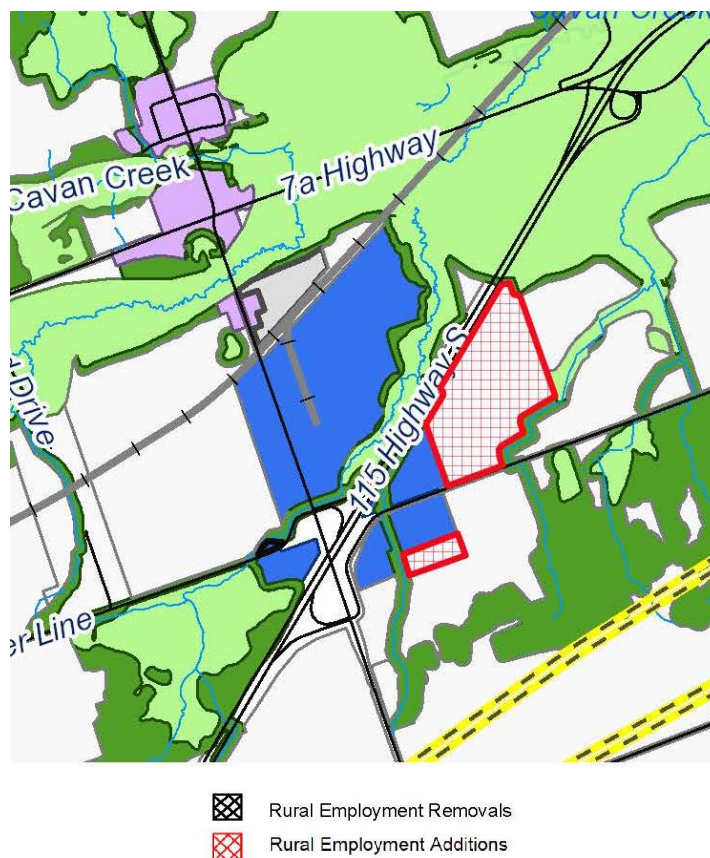
Source: Mapping provided by the Township of Cavan Monaghan, 2020.

9.2.4 Rural Employment Area at the Highway 115 and County Road 10 Interchange

The existing Rural Employment Area surrounding the Highway 115 and County Road 10 interchange consists of lands with relatively flat topography, limited environmental constraints, and are well connected to Millbrook and the Peterborough Airport via the highway. The proposed land addition to the south of the highway helps to round out the existing Rural Employment Area both north and south of Highway 115. It should be noted that the proposed addition affects lands that are currently designated as Agricultural and as such, a review of agricultural impacts is recommended to be undertaken by the Township to inform planning for the addition.



Figure 9-5
Township of Cavan Monaghan
Preliminary Rural Employment Land Addition at the Highway 115 and
County Road 10 Interchange



Source: Mapping provided by the Township of Cavan Monaghan, 2020.

9.3 Servicing Considerations for Rural Employment Lands

In reviewing the Township's Rural Employment Areas, staff and T.A.C. have also broadly considered their needs regarding water, stormwater and wastewater servicing. It is currently recognized that Rural Employment Areas will continue to be serviced by private servicing including septic and well, and that stormwater management will also be site specific. It is also anticipated that in some areas, such as the Commercial Entertainment Area and Fraserville Hamlet, site-specific servicing solutions, such as stand-alone systems or cross border servicing agreements, would need to be considered to provide water and wastewater services.



Chapter 10

Recommendations and Strategic Directions



10. Recommendations and Strategic Directions

10.1 Recommendations and Strategic Directions for Employment Areas in the Township

Recommendations and strategic directions for the Township's Employment Areas are grouped within four key themes:

1. Municipal Competitiveness and Market Supply;
2. Urban Employment Land Needs;
3. Planning for Employment Areas; and
4. Protecting Employment Areas.

The subsequent sections provide policy recommendations and strategic directions within the context of these four key themes.

10.1.1 Municipal Competitiveness and Market Supply

This theme of recommendations and strategic directions recognizes that the Township faces several broader opportunities and challenges related to its future economic growth potential and prosperity. Many of these opportunities and challenges relate to macro-economic trends over which the Township has limited control. This includes the relative strength of the global economy, international trade policy, and the competitiveness of the Canadian economic base relative to other established and emerging global markets.

When considering the Township's regional competitive ranking, the Township has considerable control particularly as it relates to the market supply of its Urban and Rural Employment Areas. As such, in order to ensure that market demand is not unduly constrained, it is critical that the Township provide sufficient market choice of designated and developable Employment Areas across the Township (e.g. serviced, serviceable and dry Employment Areas).



No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	Plan for a Higher Employment to Population Ratio	As of 2019, the Township's employment to population ratio is approximately 40%, which exceeds the Township's O.P. policy target of 1 job per every 3 people.	Revise section 2.1.3 a) of the Township's O.P. to target an employment to population ratio of 1 job per every 2 people.
2	Develop a General Marketing Strategy to Promote and Develop the Township's Employment Areas	The Township's Employment Areas are important to the regional economy and account for a significant percentage of jobs in the County. To ensure the success of the Township's Employment Areas, marketing efforts must be geared towards both the broader strengths of the Township as well as specific target sector investment attraction efforts.	Consider a range of promotional tools and incentives which can be used to inform prospective industries about the opportunities in the Township. A marketing strategy can be established after the required planning and servicing exercises have been completed. This strategy can be in the form of regularly sharing data on the Township's Urban and Rural Employment land supply publicly. Data can include amount and location of vacant employment land supply, mix of parcel sizes and their location, availability of servicing, or whether servicing is anticipated to be provided



No.	Recommendation	Opportunities and Challenges	Recommended Actions
			in the short- (within 5 years), medium- (between 5 to 10 years), or long-term (greater than 10 years). Some municipalities provide this on their websites and in newsletter form to large and/or active industrial and commercial brokers to facilitate businesses locational decisions. An additional example of a promotional strategy is preparing entrepreneur video stories. These are on-line video segments that capture stories of accomplished existing and new Township businesses. These video stories focus on local business growth and innovation, as well as supporting labour force attraction and retention. Business attraction packages can also be distributed. These typically contain a community profile, location maps of the municipality, site availability and



No.	Recommendation	Opportunities and Challenges	Recommended Actions
			pricing, sector information, and planning and servicing information. Explore opportunities to establish incubator facilities within the Township to promote and encourage the development of start-up industries, particularly related to knowledge-based sectors and other export-based emerging industry clusters.
3	Develop a Phasing Strategy with Respect to the Servicing of Urban Employment Areas	None of the Township's vacant designated Employment Areas are "shovel-ready" ¹ for development with municipal services.	Develop a phasing strategy regarding the servicing of the Township's Urban Employment Areas. In addition, to ensure that the Township's employment land supply levels are not unduly constrained, it is recommended that the Township strive to provide a minimum designated and serviced supply of at least five years at all times.

¹ Shovel-ready is defined as lands that abut an arterial or local road and have sanitary, water and storm stubbed at the property line.



No.	Recommendation	Opportunities and Challenges	Recommended Actions
4	Maximize the Marketability and Developability of Employment Land Supply	The Township currently has a significant amount of designated Rural Employment Area lands that are physically constrained and therefore not marketable.	Remove designated Rural Employment Areas that are physically constrained (e.g. environmental constraints) and not marketable for development. Designate additional Rural Employment Areas in strategic locations that are developable and marketable for near-term and longer-term development. Refine the amount of lands being removed from, and added to, the Rural Employment Area to ensure an equal amount that is being added is also being removed.



10.1.2 Urban Employment Land Needs

No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	Plan for Future Employment Lands within the Township of Cavan Monaghan	The Township has an insufficient supply of urban Employment Area lands to accommodate forecast urban land demand in Employment Areas to the year 2041.	Designate an additional 30 ha (74 acres) of urban Employment Area lands within Millbrook.
2	Regularly Monitor Long-Term Employment Land Needs	The data collected and presented in this study offers the Township with a base from which to monitor its long-term employment land needs. The Township will need to continue to update and monitor this information on a regular basis.	Develop a system to track and monitor Urban and Rural Employment Areas supply and demand in order to assist with development phasing as well as longer-term planning and land needs forecasting. For example, the Township could establish an Employment Areas supply database using the supply figures in this report. Non-residential development applications and building permits could be used to track urban and rural industrial land absorption against the Township's Employment Area supply inventory. Other examples also include reporting to Council on a consistent basis (e.g. every year or two years) of the Township's Employment Areas supply and recent non-residential development activity.



The provincial L.N.A. and County M.C.R. require that employment land needs are assessed to the year 2041. Furthermore, as demonstrated in section 7.3, the Township has an urban Employment Area shortfall of 30 ha to the year 2041. As such, the proceeding table outlines recommendations and strategic directions for the Township to pursue in order to plan for this long-term urban Employment Area land needs.

10.1.3 Planning for Employment Areas

It is recognized that structural changes in the macro-economy are influencing the way we plan for Employment Areas. Increasingly, there is a development emphasis towards knowledge-based sectors which have distinct requirements regarding labour force supply, employment-supportive uses and amenities, location, anchor tenants and the character of the Employment Areas in which they locate. The following section provides policy recommendations and strategic directions to plan for both Urban and Rural Employment Areas.



10.1.3.1 General Planning Policies for Urban Employment Areas

No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	Plan for the Vision of the Urban Employment Area by Mitigating Land-Use Compatibility Conflicts	The Township's O.P. policy 4.6.2 currently allows a variety of uses and employment sectors within Urban Employment Areas. However, the Township's O.P. does not provide a specific vision which helps to distinguish its Urban and Rural Employment Areas.	Generally, it is recommended that the Township encourage employment uses in Urban Employment Areas which require full municipal services and are compatible with the surrounding urban land uses within the Millbrook Urban Area. The Township will need to further mitigate land-use compatibility conflicts during the planning approvals process due to the variety and range of uses which are permitted in the Township's Urban Employment Area O.P. policies.



10.1.3.2 General Planning Policies for Rural Employment Areas

No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	Recognize Opportunities for Agricultural-Related Industrial and Commercial Uses on Agricultural Lands and in Employment Areas	The agricultural base represents a significant component of the Township's local economy. The agriculture and agri-food systems encompass several industries including the farm input and service supplier industries, primary agriculture, food and beverage processing, food distribution, retail, wholesale and food service industries. In addition, the agriculture sector is evolving towards greater inclusion and consideration of on-farm diversified uses, vertical agriculture, hydroponics, and cannabis production for example.	Continue to recognize opportunities for agricultural-related industrial and commercial uses on Agricultural Lands and in Employment Areas. When siting agricultural-related industrial and commercial uses in Urban Employment Areas, consider land-use compatibility and servicing needs. Best practices regarding preparing land-use policies in this respect will need to be explored in the Township's O.P. Review.



10.1.3.3 Planning for Specific Rural Employment Areas

No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	In the North Monaghan Employment Area: Plan for the Rural Employment Land Addition by Including Land-Use Compatibility Considerations in Applicable O.P. Policies	In accordance with the findings of this G.M.S., a proposed Rural Employment Land addition is identified in proximity to the Five Mile Turn Hamlet. A high-level overview of the zoning by-law applicable to this area indicates that heavier industrial uses are permitted, presenting potential land-use incompatibility issues between the more residential nature of the Five Mile Turn Hamlet, and the suggested Rural Employment Land addition.	To mitigate potential land-use incompatibility issues introduced by expanding the Rural Employment Land designation in this area, it is recommended that the Township amend the special policy for the North Monaghan Employment Area to include land-use compatibility provisions. This would provide the Township with an opportunity to continue permitting heavier industrial uses on these lands, but have an opportunity, through policy, to appropriately assess any potential land-use conflicts associated with the addition of Rural Employment Lands adjacent to the Five Mile Turn Hamlet area.



No.	Recommendation	Opportunities and Challenges	Recommended Actions
2	In the Rural Employment Area Near Peterborough Airport: Plan for the Rural Employment Land Removals and Additions by Promoting Permitted Uses Related to General Aviation and Manufacturing	Most of the Rural Employment Lands proposed to be removed consist of floodplain constraints and are subject to increasingly protective environmental policies. This compromises the developability of these lands in the long term, potentially negatively impacting business and economic attraction to the Peterborough Airport. By removing constrained lands and adding lands that are not impacted by environmental features, the developable potential, availability and marketability of the Rural Employment and Airport Employment Lands surrounding the Peterborough Airport would improve. Increasing the critical mass of developable lands in this area would also potentially increase the competitiveness and profile of this area given its access to the Peterborough Airport, Highway 115, railway, and the City of Peterborough.	Apply the existing permitted uses of Rural Employment Lands, with a focus on promoting general aviation and manufacturing-related uses in order to complement the presence of Peterborough Airport and the Airport Employment Area.



No.	Recommendation	Opportunities and Challenges	Recommended Actions
3	In the Commercial Entertainment-North Fraserville Area: Plan for the Rural Employment Land Addition	The proposed Rural Employment Land addition to the east of the existing Commercial Entertainment designation has the potential to build on the success of Shoreline Slots, leading to further redevelopment opportunities within the area.	Apply the existing permitted uses of Rural Employment Areas, with the potential to broaden the permitted uses to include commercial-oriented permissions such as small-scale stand-alone or multi-tenant office developments, to further compliment the existing Commercial Entertainment designation to the west. Considering the potential land-use incompatibilities between the newly designated Rural Employment Area and existing Commercial Entertainment designation, it is recommended that the Township consider permitting Rural Employment Area uses that are more compatible with Commercial Entertainment at the interface of both designations.
4	In the Rural Employment Area Surrounding Highway	This area surrounds a major interchange at Highway 115 and is less	Assess the impacts of the proposed Rural Employment Land additions



No.	Recommendation	Opportunities and Challenges	Recommended Actions
	115/County Road 10: Plan for an Expanded Rural Employment Area	than 2 km from Millbrook, the only urban settlement area in the Township that has full municipal services and is the primary focus of growth and development within the Township. Accordingly, there are many business and economic development opportunities for this Rural Employment Area. The proposed expansion lands to the Rural Employment Area are currently designated as an Agricultural Area. As such, a review of agricultural impacts is recommended to be undertaken by the Township to inform planning for the addition.	south of Highway 115 to the currently designated Agricultural Lands. If the additions are found to have minimal to no impact (or the impact could be mitigated), it is recommended that the Township apply the permitted uses for Rural Employment Areas to these land additions.



10.1.4 Protecting Employment Areas

It is recognized that Employment Areas represent an important component of the Township's urban structure, particularly lands that are located within proximity to goods movement infrastructure such as controlled access highways, airports, rail and arterial roads. Employment Areas accommodate a range of export-based employment sectors that are critical to local economic development. These uses are often land extensive and cannot be accommodated in other commercially designated areas. As such, the recommendations and strategic directions provided in this section focus on the need to protect Urban and Rural Employment Areas within the Township.

Policy Tools to Seek a Higher Level of Protection for Employment Areas

It should be noted that the Township is currently exploring the application of the Provincially Significant Employment Zones (P.S.E.Z.) to the Peterborough Airport and select Rural Employment Areas around the Airport as a way to seek a higher level of protection for these areas. Pursuing the P.S.E.Z. designation is an option to provide this level of protection for Employment Areas. An additional option for the Township to seek a higher-level of protection for these Employment Areas is by identifying them as regionally significant. The following explanation provides information for the Township in its pursuit of the P.S.E.Z. or regionally significant Employment Areas designation.

As outlined in the Growth Plan, 2019, P.S.E.Z. are areas defined by the Minister in consultation with affected municipalities for the purpose of long-term planning for job creation and economic development. They may consist of Employment Areas as well as mixed-use areas that contain a significant number of jobs. According to the Province, a request for P.S.E.Z. designation may be located inside a settlement area and not in the Greenbelt, not be under appeal at the Local Planning Appeal tribunal, be located near major transportation or goods movement infrastructure, have a high concentration of employment, have a high economic impact or play an economic or strategic role to the region, be vulnerable to conversion to non-employment uses, include development potential for employment uses, and share a common border with an existing P.S.E.Z. Many of the existing designated P.S.E.Z. across the G.G.H. apply to urban Employment Areas that are highly accessible to one or more 400-series highways as well as other regionally strategic goods movement infrastructure (e.g. Hamilton Airport, CN and CP intermodal yards in the Cities of Brampton and Vaughan, and the Toronto Pearson International Airport, etc.). The majority of these sites are



concentrated in the Greater Toronto and Hamilton Area (G.T.H.A.). Examples of P.S.E.Z. designations outside of the G.T.H.A. include Waterloo Region, Haldimand County, and Simcoe County, and encompass Employment Areas with a large multinational manufacturing presence (e.g. Toyota Motor Manufacturing Canada, Stelco, and Honda of Canada Manufacturing). According to the Province, P.S.E.Z. are also areas of high economic output and are strategically located to provide stable, reliable employment across the region.

Policy 2.2.5.10 of the Growth Plan, 2019 outlines that Employment Areas defined by the Minister to be P.S.E.Z. may still be converted to non-employment uses, however only through a M.C.R. and where the requirements of policy 2.2.5.9 are met (i.e. there is a need for the conversion, the lands are not required over the planning horizon for the employment purposes they are designated, etc.). The higher level of protection and consideration afforded to P.S.E.Z. is through the mechanism of evaluating potential Employment Area land conversions through a M.C.R. (i.e. at minimum every five years as opposed to at any time).

Regionally significant Employment Areas were first introduced in the Provincial Policy Statement (P.P.S.), 2020. Although the P.P.S. 2020 does not offer further details at this time on a specific process to designate Employment Areas as regionally significant, policy 1.3.2.5 currently outlines that existing Employment Areas identified as regionally significant would have to be reviewed through a M.C.R. This indicates that regionally significant Employment Areas possess the same higher level of protection and consideration as P.S.E.Z. The difference is the P.S.E.Z. is dependent on the Province to approve the designation, and to signal the significance of the Airport Employment Lands, independent of the County's M.C.R. With the regionally significant Employment Areas designation, it may be determined by the Township working together with the Peterborough and Kawartha Economic Development Corporation throughout the course of the County's M.C.R. Although the regionally significant Employment Areas designation is subsequently subject to the Province's approval through the County's M.C.R., there is greater control available to the County, Township, and other regional partners to define regional vision and economic development strategy for the Airport and surrounding Rural Employment Areas. In summary, a higher level of protection and consideration for the Peterborough Airport and surrounding Rural Employment Areas can be achieved through either a P.S.E.Z. or regionally significant Employment Areas designation. The subsequent recommendations provide the Township with an



additional consideration of pursuing the regionally significant Employment Areas designation within the framework of the P.P.S. 2020 while it is seeking Provincial approval for a P.S.E.Z. designation.



No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	Protect Employment Areas from Conversion to Non-Employment Uses	The conversion of Employment Areas to non-employment uses potentially negatively impacts the Township's economy.	Develop a series of broad principles for evaluating proposed conversions in Employment Areas based on best practices, relevant provincial and County policies, and supporting documents. These principles can include, but are not limited to, that: • Employment Areas in proximity to major transportation corridors and goods movement infrastructure be protected to ensure businesses have access to a transportation network that safely and efficiently moves goods and services; • The configuration, location, and contiguous nature of Employment Areas be maintained in order to prevent fragmentation and provide business supportive environments; • A variety of Employment Area lands be provided in order to improve market supply potential and Township attractiveness to a variety of employment sectors and business sizes;



No.	Recommendation	Opportunities and Challenges	Recommended Actions
			• Land-use incompatibilities issues with the converted use are limited and/or mitigated; and • Overall the employment and job potential of Employment Areas is retained.
2	Strategically Plan for and Protect the Township's Employment Areas Surrounding the Peterborough Airport	It is recognized that the Township's designated Airport Employment Areas and Rural Employment Areas surrounding the Peterborough Airport are economically significant to the Township and the surrounding region. These lands benefit from potential synergies associated with their proximity to the Peterborough Airport and other key infrastructure assets.	Given the desire of the Township to further enhance the protection of the Employment Areas surrounding the Peterborough Airport, the Township could continue investigating the P.S.E.Z. designation with the Province and in the meantime, employ the use of 2020 P.P.S. policy 1.3.2.5. The Township could consider working with its regional economic development corporation to investigate the feasibility of the Rural and Airport Employment Areas surrounding the Peterborough Airport being designated as regionally significant. This would mean employment conversion requests in these regionally significant Employment Areas would have to be reviewed in the context of a Municipal



No.	Recommendation	Opportunities and Challenges	Recommended Actions
			Comprehensive Review (M.C.R.), which would occur every five to ten years. This is a similar level of protection for P.S.E.Z., however provides the Township with immediate opportunity to work within the County M.C.R. and explore the feasibility of designating the Peterborough Airport and surrounding Employment Areas as regionally significant.



10.2 Recommendations and Strategic Directions for Residential Areas in Millbrook

Recommendations and strategic directions for the Township's Residential Areas are provided in the subsequent table. They consider planning for the long-term residential land needs identified in section 7.1 and amendments to the Township's O.P. policies regarding housing targets.



No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	Plan for Future Residential Lands within Millbrook in the Township of Cavan Monaghan	The Township has an insufficient supply of residential lands to accommodate forecast residential land demand to the year 2041.	Designate an additional 50 ha (124 acres) of residential lands within Millbrook.
2	Plan for a Higher Level of Residential Growth within the Millbrook Area to Adequately Accommodate Anticipated Demand	The current goal of the Township's O.P. is to plan for residential growth of approximately 65 residential units per year to the year 2031, with most of the growth being directed to Millbrook. The updated long-term residential growth forecasts developed as part of this G.M.S. indicate that future housing growth is anticipated to exceed the Township's existing long-term projections to 2031. The revised forecast also provides further insights with respect to long-term housing demand over a greater planning horizon (i.e. to 2041).	To the year 2041, it is suggested that the Township plan for residential growth of approximately 100 residential units per year from 2016 to 2041.
3	Establish a 15% Intensification Target to the Year 2041	The Township's O.P. sets an intensification target that 20% of the Township's housing needs to the year 2031 shall be provided through	It is recommended that the Township amend its intensification target such that 15% of the Township's housing needs to the



No.	Recommendation	Opportunities and Challenges	Recommended Actions
		residential infilling, intensification, and redevelopment within the B.U.A. The intensification target needs to be updated in order to consider the planning horizon that has been extended from the year 2031 to 2041.	year 2041 be provided within the B.U.A. of Millbrook.
4	Plan to Meet a Minimum Designated Greenfield Area Target of 30 People and Jobs per Hectare	Since the Township's O.P. does not currently establish a D.G.A. density target, Growth Plan Policy 2.2.7.2 b) was referred to, which requires that the County of Peterborough achieve within the horizon of this Plan a minimum density target that is not less than 40 residents and jobs combined per hectare. The analysis provided herein identifies that a minimum D.G.A. density target of 30 people and jobs per hectare is more appropriate for the Township.	The Township establish a minimum D.G.A. density target of 30 people and jobs per hectare, with the expectation that it may be adjusted following the Peterborough County's in-progress M.C.R. process.



No.	Recommendation	Opportunities and Challenges	Recommended Actions
5	Plan for a Housing Mix of 60% Low-Density Units, 25% Medium-Density Units, and 15% High-Density Units to the Year 2041	The Township's O.P. policy 4.1.4. c) establishes an optimum housing unit mix within the boundaries of Millbrook to be 75% low-density housing (singles, semis, duplexes); 10% medium-density housing (multiple units, townhouses); and 15% high-density housing (apartments). Although low-density housing continues to be the preferred form of housing in Millbrook and the Township more broadly, recent housing development and residential building permit activity (new housing units) has demonstrated a slight shift towards medium- to high-density housing forms.	Consideration should be made to amend the Township's O.P. housing mix to be 65% low-density, 20% medium-density, and 15% high-density housing forms.



10.3 Recommendations and Strategic Directions for Commercial Areas in Millbrook

Recommendations and strategic directions for the Township's Commercial Areas are provided in the subsequent table. They consider planning for the long-term commercial land needs identified in section 7.2 and amendments to the Township's O.P. policies where it considers the Community Commercial policy.



No.	Recommendation	Opportunities and Challenges	Recommended Actions
1	Plan for Future Commercial Lands within Millbrook in the Township of Cavan Monaghan	The Township has an insufficient supply of commercial lands to accommodate forecast commercial land demand to the year 2041. The demand for retail uses includes primarily services and local serving uses, such as restaurants, grocery stores, pharmacies, banks and financial institutions, liquor stores and personal services locations.	Designate an additional 5 ha (12 acres) of Commercial Lands within Millbrook.
2	Broaden the Retail and Services Permitted in the Community Commercial Policy	The Township's downtown core currently has limitations on accommodating additional retail development which may place further pressures on the downtown core of Millbrook, and result in the loss of uses that are important to its function. The existing Community Commercial policy is fairly limited in its permitted retail uses and as the Township's population base increases, demand for these retail and services will be required.	The Township should consider a review of its Community Commercial policy permissions and consider broadening permitted retail uses such as permitting banks and financial institutions, liquor stores, post office, personal services, and professional offices as primary uses.



Chapter 11

Conclusion and Next Steps



11. Conclusion and Next Steps

This study provides a comprehensive assessment of the Township's long-term population, housing, and employment growth potential within the context of County-wide development trends and regional economic growth drivers. It was found that over the 2016 to 2041 forecast period, the High Growth Scenario for the Township represents the “most likely” growth scenario for the Township building on the key growth drivers and trends explored throughout this study.

This study also provides an understanding of whether there is an adequate supply of urban and rural lands to accommodate long-term demand and satisfy the Township's near-term and longer-term employment and population growth objectives. To accommodate anticipated long-term demand within the Township's Urban Employment Areas (Millbrook), an Employment Area expansion of 30 hectares is recommended. Furthermore, to accommodate anticipated long-term demand within the Township's urban Residential and Commercial Areas (Millbrook), Residential and Commercial Area expansions of 50 and 5 hectares, respectively, are recommended.

Although the results of this study have concluded there is no foreseeable need for additional Employment Area expansion in the Township's Rural Area, a review of developability and marketability of the Township's Rural Employment Areas has led to a series of recommendations to remove and add to the Township's Rural Employment Area designation, subject to the results of additional study in accordance with the 2020 P.P.S.

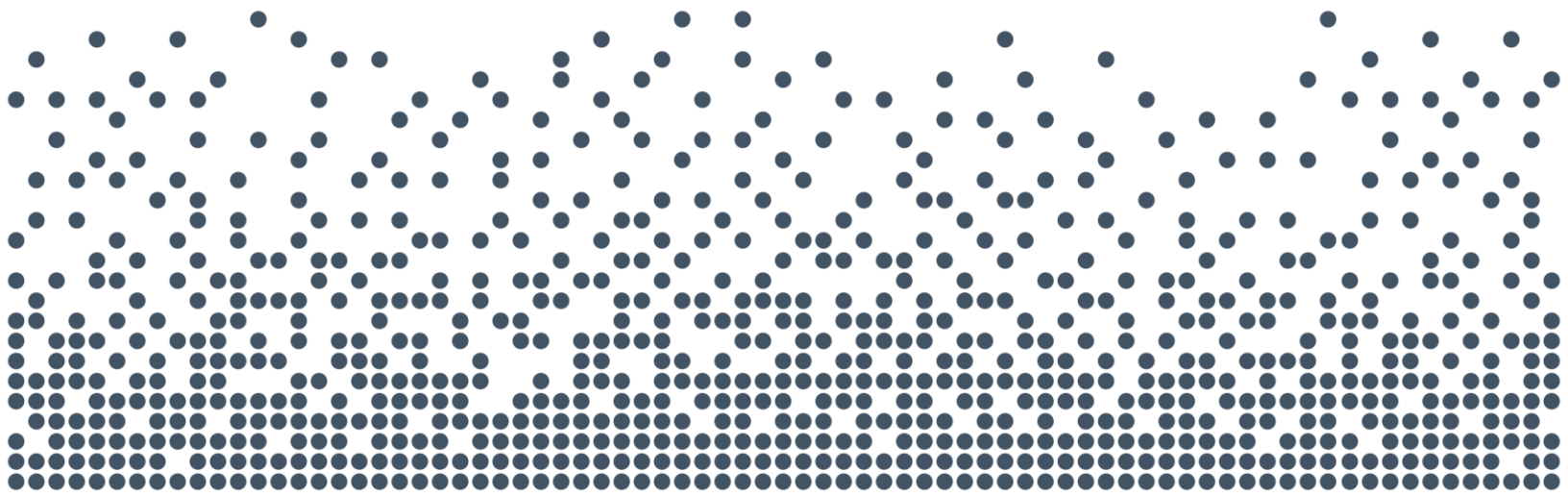
Given the key findings of this study, the next step is for the Township to implement the results of the Rural Employment Lands review in this study through a local O.P.A. and Zoning By-Law Amendment, subject to compliance with the 2020 P.P.S., the County of Peterborough O.P., and the Township of Cavan Monaghan O.P. It is also recommended that the Township provide the County of Peterborough with the findings of this G.M.S. in order to inform the County's in-progress M.C.R. and O.P. Review, which will require the County O.P. to be updated by July 1, 2022. A second local O.P.A. will be required related to the recommendations of the Township's urban lands subject to the results of the County's M.C.R. and O.P. Review.

In addition to the more policy-based amendments and considerations resulting from the findings of this study, the next step for the Township is to implement other tools and



strategies to help improve planning for its Employment Areas. These include, but are not limited to, the following:

- Develop a marketing strategy to promote its Employment Areas;
- Prepare a series of broad principles for evaluating proposed conversions in Employment Areas;
- Create a system to monitor the Township's Urban and Rural Employment Areas supply; and
- Explore the designation of regionally significant employment lands with the County and Peterborough and Kawarthas Economic Development Corporation as the County undergoes its M.C.R.



Appendices



Appendix A

Interview Guides for Stakeholder Consultations



APPENDIX A: INTERVIEW GUIDES FOR STAKEHOLDER CONSULTATION

There were two interview guide styles provided and they were disseminated depending on the type of stakeholder and their area of expertise. Note that the stakeholder consultations took place when the study began as an Employment Lands Strategy. Insight provided from stakeholder consultations were used to initially inform the employment growth forecasting exercises and then were referred to during the population and household growth forecasting exercises.

Interview Guide A – Employment Lands Strategy 2019

The Township of Cavan Monaghan is developing an Employment Lands Strategy. The objective of this Strategy will be to provide a comprehensive review of the Township's designated Employment Areas and future regional/local economic and development trends.

This interview guide will be used to lead the stakeholder interviews. They are not meant to be prescriptive and are to give you an idea of the different topics we will cover.

It is encouraged that you share additional feedback that may not be covered on this interview guide or the interview discussion.

If you have any questions, please feel free to reach out to Township or Consultant Team representatives.

Trends and Competitiveness

- What are the key physical and economic attributes that employment land developers generally desire in Employment Areas in the Township and/or the County (e.g. industrial/business park land, commercial, retail development)?
- In your opinion, what are the strengths and weaknesses of the Township in terms of attracting and retaining employment?
- What do you see as some of the Township's opportunities and challenges?
- In comparison to other municipalities within the County and surrounding area, how competitive do you feel the Township is for industrial, office, and/or commercial development (consider factors like location and transportation access, available serviced industrial lands, industrial land prices, access to



amenities, property taxes, development impact fees/charges, water/sewer rates/ other utilities, access to skilled labour)?

- In your observations, what role have you noticed surrounding municipalities and those within the County play in attracting employment and associated employment land development, and what has the Township's traditional role been in that?

Market Demand and Supply

- What is your perspective on the short-term and medium-term market (i.e. 0 to 12 months and 1 to 3 years) for industrial and office development in the Township?
- In your opinion, has interest for industrial, office, and/or commercial development increased or decreased in the last few years? Please specify expanding/ contracting sectors.
- In your opinion, do you think the employment land supply in the Township is well aligned with demand in terms of quantity, site characteristics (e.g. parcel size, access to highways, etc.), and location?
- In your opinion, what will be the impacts of the Peterborough Airport Master Plan/ Strategic Development Plan and the City of Peterborough's constraints with their Employment Areas on Employment Areas within the Township (e.g. supply, demand, development)?

Township Context

- In your opinion, are there specific planning policies and/or zoning by-law regulations that enhance or impede the Township's competitiveness and ability to develop its vacant Employment Areas, or the redevelopment of its occupied/ underutilized Employment Areas?
- What role can and should the Township play in attracting new industry? What industries should the Township pursue?

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Interview Guide B – Employment Lands Strategy 2019

The Township of Cavan Monaghan is developing an Employment Lands Strategy. The objective of this Strategy will be to provide a comprehensive review of the Township's designated Employment Areas and future regional/local economic and development trends.

You were identified as a key stakeholder to interview to get insight on the challenges and opportunities of planning and developing Employment Areas within the municipality.

This interview guide will be used to lead the stakeholder interviews. They are meant to give you an idea of the different topics we will cover.

It is encouraged that you share additional feedback that may not be covered on this interview guide or the interview discussion.

If you have any questions, please feel free to reach out to Township or Consultant Team representatives.

General

- Tell us about your interest in planning and/or developing Employment Areas in the Township.

Trends and Competitiveness

- In your opinion, what are the strengths and weaknesses of the Township in terms of attracting and retaining employment and businesses (e.g. quality of life, affordability, availability of large and vacant parcels, presence of post-secondary institutions, etc.)?
- What do you see as some of the Township's opportunities and challenges with its Employment Areas?
- In comparison to other municipalities within the County and surrounding area, how competitive do you feel the Township is for industrial, office, and/or



commercial development? (Consider factors like location and transportation access, available serviced industrial lands, industrial land prices, access to amenities, property taxes, development impact fees/charges, water/sewer rates/ other utilities, access to skilled labour.)

- What types of businesses/sectors/jobs have you observed the Township attracting in the last 5 years?
- What kinds of businesses/sectors/jobs do you feel the Township should be focused on attracting? Why?
- What role can and should the Township play in attracting new industry? What industries should the Township pursue?

Market Demand and Supply

- What is your perspective on the short-term and medium-term market (i.e. 0 to 12 months and 1 to 3 years) for industrial and office development in the Township?
- In your opinion, has interest for industrial, office, and/or commercial development increased or decreased in the last few years? Please specify expanding/ contracting sectors.
- In your opinion, do you think the employment land supply in the Township is well aligned with demand in terms of quantity, site characteristics (e.g. parcel size, access to highways, etc.), and location?

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Appendix B

Supplemental Housing Supply Information



APPENDIX B: SUPPLEMENTAL HOUSING SUPPLY INFORMATION

Residential Supply Opportunities in the Development Approvals Process

Figure B-1 and Figure B-2 outline the supply opportunities in the development approvals process. Most of the units in the development approvals process are under review and low density.

Figure B-1
Units in the Development Approvals Process by Planning Application Status
in the Township of Cavan Monaghan

Planning Application Status	Housing Type			Total	Share
	Low Density	Medium Density	High Density		
Application Under Review	525	244	192	961	71%
Draft Approved	51	-	-	51	4%
Registered	279	65	-	344	25%
Total	855	309	192	1,356	100%

Source: Derived by Watson & Associates Economists Ltd. from Township of Cavan Monaghan development applications data as of August 2019. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: Numbers may not add precisely due to rounding.



Figure B-2
Units in the Development Approvals Process by Settlement Area
in the Township of Cavan Monaghan

	Housing Type				
	Low Density	Medium Density	High Density	Total	Share
Millbrook Urban Settlement Area					
Within Built Boundary	-	-	-	-	
Outside Built Boundary	821	309	192	1322	
Millbrook Urban Settlement Area Total	821	309	192	1,322	97%
Mount Pleasant Hamlet	19	-	-	19	1%
Five Mile Turn Hamlet	-	-	-	-	
Ida Hamlet	15	-	-	15	1%
Cavan Hamlet	-	-	-	-	
South Monaghan Hamlet	-	-	-	-	
Baileboro Hamlet	-	-	-	-	
Fraserville Hamlet	-	-	-	-	
Municipal Total	855	309	192	1,356	

Source: Derived by Watson & Associates Economists Ltd. from Township of Cavan Monaghan development applications data as of August 2019. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: Numbers may not add precisely due to rounding.

Residential Intensification Supply Opportunities

Figure B-3 outlines the residential intensification supply opportunities within the built-up area of Millbrook. Residential intensification supply opportunities account for the smallest share (approximately 5%) of the Township's overall residential supply. In addition, nearly half the Township's residential intensification supply opportunities are low density.



Figure B-3
Residential Intensification Supply Opportunities in the Built-Up Area of Millbrook

Housing Type	Land Area	Density (units/ha) ¹	Units	Housing Mix ²
Low Density	2.0	25	51	48%
Medium Density	0.9	35	31	29%
High Density	0.4	55	24	23%
Total	3.4	32	106	100%

Source: Derived by Watson & Associates Economists Ltd. from Township of Cavan Monaghan data and desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

¹ Density assumptions were made by assessing density trends of current residential development and developments in the approvals process.

² Housing mix assumptions were made by assessing housing mix trends of current residential development and developments in the approvals process, and best practices.

Note: Numbers may not add precisely due to rounding.

Greenfield Supply Opportunities

Figure B-4 and Figure B-5 outline the greenfield supply opportunities in Millbrook. Greenfield supply opportunities not in the development approvals process account for approximately 20% of the Township's overall residential supply. In addition, most of the Township's greenfield supply opportunities are low density.

Figure B-4
Greenfield Supply Opportunities in Millbrook

Housing Type	Land Area	Density (units/ha) ¹	Units	Housing Mix ²
Low Density	10.1	25	253	69%
Medium Density	2.1	35	75	20%
High Density	0.7	55	39	11%
Total	13.0	28	367	100%

Source: Derived by Watson & Associates Economists Ltd. from Township of Cavan Monaghan data and desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

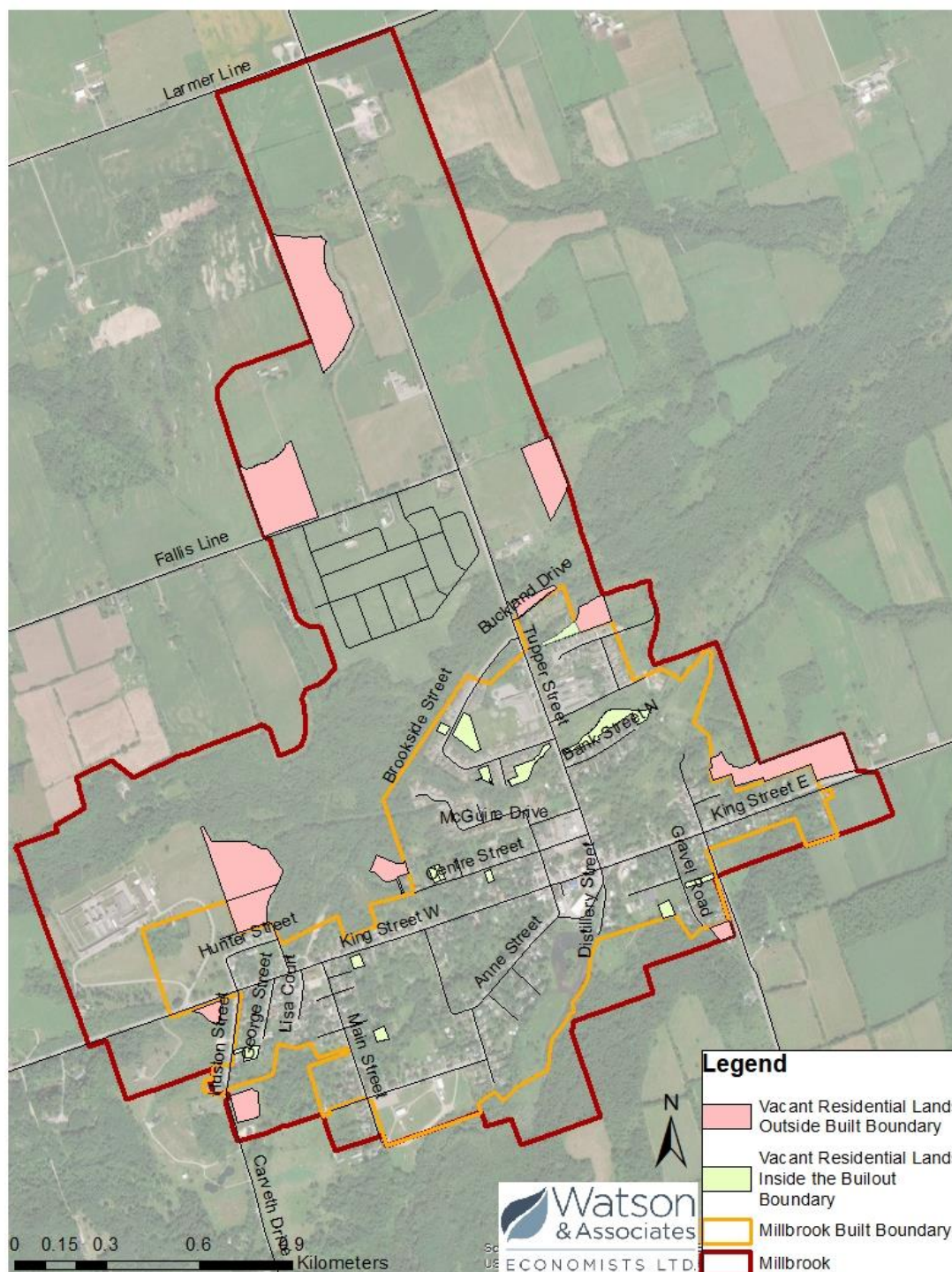
¹ Density assumptions were made by assessing density trends of current residential development and developments in the approvals process.

² Housing mix assumptions were made by assessing housing mix trends of current residential development and developments in the approvals process, and best practices.

Note: numbers may not add precisely due to rounding.



Figure B-5
Map of Greenfield Supply Opportunities in Millbrook



Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data and desktop review, 2019.



Summary of the Township's Overall Residential Supply Opportunities

Figure B-6 to Figure B-8 demonstrate the Township's overall residential supply opportunities by types of opportunities (i.e. in the development approvals process, through residential intensification, and on greenfield lands) and settlement areas.

Overall, approximately 63% of the Township's residential supply is low density, 23% is medium density, and 14% is high density. It can also be observed that most of the Township's overall residential supply is in the development approvals process, specifically undergoing planning and development review. Moreover, most of the units in the development approvals process are on greenfield lands, outside of the built-up area of Millbrook. Finally, of the Township's overall residential supply, Millbrook has an approximately 98% share of it.

Figure B-6
Residential Supply Opportunities of the Township of Cavan Monaghan
by Type of Opportunity

	Housing Type				Share
	Low Density	Medium Density	High Density	Total	
Development Approvals Process	855	309	192	1,356	74%
Greenfield Opportunities	253	75	39	367	20%
Intensification Opportunities	51	31	24	106	6%
Total	1,159	415	255	1,829	100%
Share	63%	23%	14%		100%

Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: Numbers may not add precisely due to rounding.



Figure B-7
Residential Supply Opportunities in the Township of Cavan Monaghan
by Settlement Areas and Type of Opportunity

	Housing Type				
	Low Density	Medium Density	High Density	Total	Share
Millbrook Urban Settlement Area					
Within Built Boundary					
Development Approvals Process	-	-	-	-	0%
Intensification Opportunities	51	31	24	106	6%
Total Within Built Boundary	51	31	24	106	6%
Outside Built Boundary					
Development Approvals Process	821	309	192	1,322	72%
Greenfield Opportunities	253	75	39	367	20%
Total Outside Built Boundary	1,074	384	231	1,689	92%
Other Settlement Areas					
Development Approvals Process					
Hamlets	34	-	-	34	2%
Total in Other Settlement Areas	34	-	-	34	2%
Township Total	1,159	415	255	1,829	
Township Share	63%	23%	14%	100%	

Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: Numbers may not add precisely due to rounding.



Figure B-8
Residential Supply Opportunities in the Township of Cavan Monaghan
by Settlement Area

Settlement Area	Housing Type				
	Low Density	Medium Density	High Density	Total	Share
Millbrook Urban Settlement Area	1,125	415	255	1,795	98%
Mount Pleasant Hamlet	19	-	-	19	1%
Five Mile Turn Hamlet	-	-	-	-	-
Ida Hamlet	15	-	-	15	1%
Cavan Hamlet	-	-	-	-	-
South Monaghan Hamlet	-	-	-	-	-
Baileboro Hamlet	-	-	-	-	-
Fraserville Hamlet	-	-	-	-	-
Township Total	1,159	415	255	1,829	100%
Township Share	63%	23%	14%		100%

Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Note: numbers may not add precisely due to rounding.



Appendix C

Supplemental Employment Supply Information



APPENDIX C: SUPPLEMENTAL EMPLOYMENT SUPPLY INFORMATION

Vacant Employment Lands Supply

Figure C-1 to Figure C-5 show the vacant employment land supply of the Township of Cavan Monaghan between the Urban and Rural Employment Areas. It also shows the parcel sizes of the vacant supply in terms of number of parcels and area.

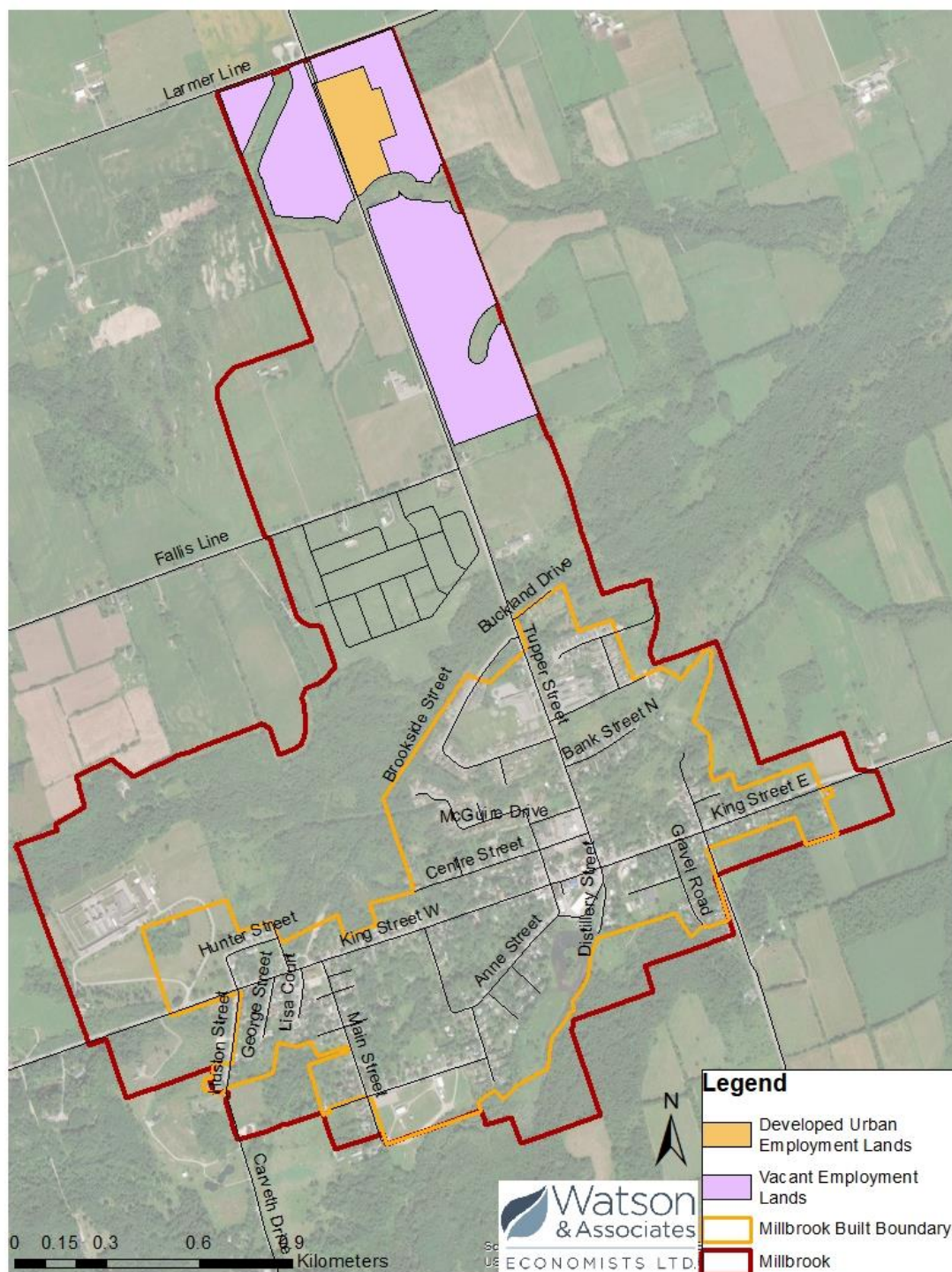
Figure C-1
Vacant Employment Land Supply of the Township of Cavan Monaghan

Employment Lands Designation	Area (gross ha)	Area (net ha)	Share
Urban Employment	40	26	14%
Rural Employment	245	159	86%
Total	285	185	100%

Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data, 2019.



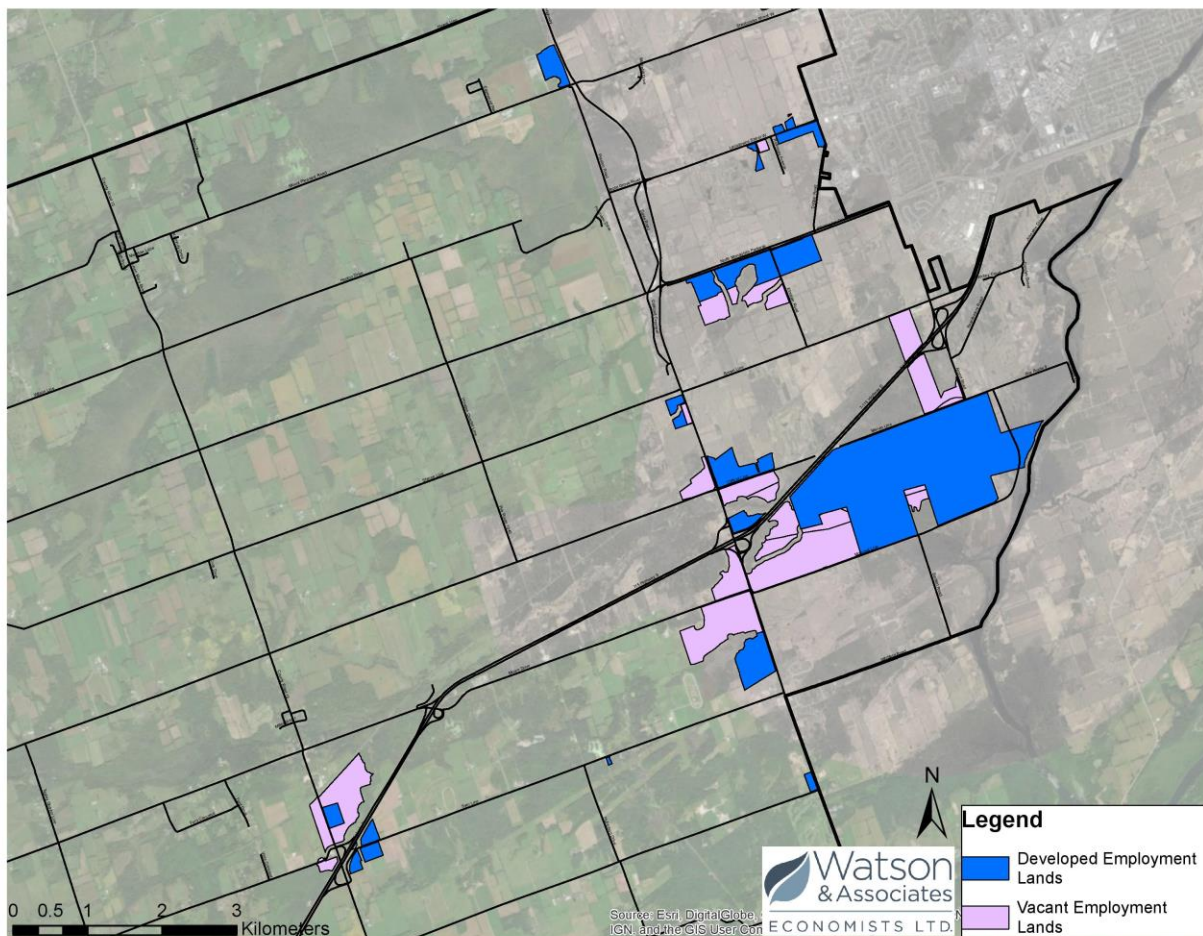
Figure C-2
Map of the Vacant and Developed Urban Employment Land Supply in Millbrook



Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data, 2019.



Figure C-3
Map of the Vacant and Developed Rural Employment Land Supply
in the Township of Cavan Monaghan



Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data, 2019.



Figure C-4
Parcel Sizes of Vacant Employment Lands in the Township of Cavan Monaghan
(number of parcels)

Parcel Sizes	Millbrook Urban Area	Rural Area	Total	Share
Less than 1 ha	-	2	2	17%
1 to 2 ha	-	2	2	17%
2 to 5 ha	1	1	2	17%
5 to 10 ha	2	1	3	25%
Greater than 10 ha	1	2	3	25%
Total	4	8	12	100%

Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data.

Figure C-5
Parcel Sizes of Vacant Employment Lands in the Township of Cavan Monaghan
(area, gross ha)

Parcel Sizes	Millbrook Urban Area	Rural	Total	Share
Less than 1 ha	-	1	1	1%
1 to 2 ha	-	3	3	4%
2 to 5 ha	3	3	6	6%
5 to 10 ha	17	9	26	28%
Greater than 10 ha	20	36	57	61%
Total	40	53	93	100%

Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data.

Developed Employment Lands Supply

Figure C-6 outlines the developed employment land supply of the Township between the Urban and Rural Employment Areas.

Figure C-6
Developed Employment Land Supply of the Township of Cavan Monaghan

Employment Lands Designation	Area (ha)	Share
Urban Employment Area	5	1%
Rural Employment Area	614	99%
Total	619	100%

Source: Derived by Watson & Associates Economists Ltd. from County of Peterborough and Township of Cavan Monaghan data.



Appendix D

Growth Forecast Approach



APPENDIX D: GROWTH FORECAST APPROACH

In developing the Township of Cavan Monaghan population and housing projections prepared herein, the following key economic trends, growth drivers, and disruptors have been briefly addressed:

- National, provincial, and region-wide economic trends that are anticipated to influence development and economic competitiveness within the local and regional employment market;
- The influence of forecast population changes within Cavan Monaghan, associated with:
 - Local employment opportunities within the Township and the surrounding commuter-shed (an analysis of recent commuting trends is presented in Appendix A);
 - Demographic and labour-force impacts associated with an aging population;
 - Forecast housing market demand geared to empty-nesters and retirees (i.e. 55+ group);
 - A brief assessment of housing affordability within the Township; and
 - Consideration of major infrastructure improvements.

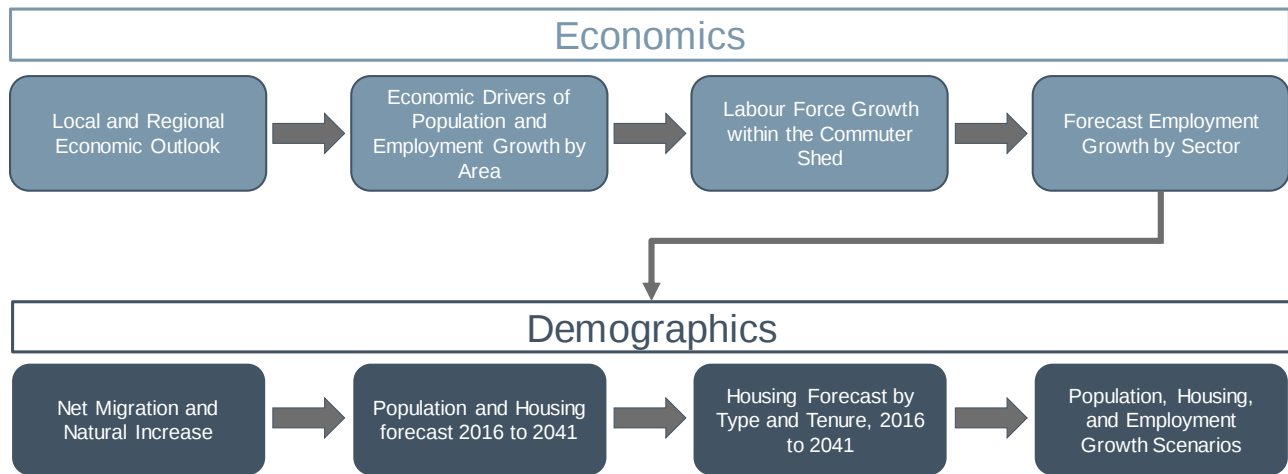
This broader analysis has been used to assess local long-term trends and potential within Cavan Monaghan related to the following:

- Labour force growth;
- Net migration;
- Population change by age;
- Future permanent housing needs and forecast trends in household occupancy; and
- Housing demand by structure type.

Figure D-1 provides a schematic overview of the population and housing growth projection approach discussed above.



Figure D-1
Approach to Long-Term Population and Housing Growth Projection



This analysis has been designed to answer the following questions regarding long-term demographic and housing growth trends within the Township:

- What is the long-term economic and population growth potential for Cavan Monaghan within the broader economic region (i.e. commuter-shed)?
- What share of forecast population growth within the broader regional market area and the Township should be assumed for the Township? How is this share expected to change over time?
- What are the key economic drivers and disruptors of future population and housing growth within Cavan Monaghan?
- How will evolving demographic/economic trends (e.g. population age structure, housing affordability) and planning policy impact future population growth rates and market demand for housing by type?
- What will future housing development look like in Cavan Monaghan? What forms will new housing take in terms of structural type and housing occupancy? Who will be the target demographic groups?

Long-term Population and Household Forecast Approach

The Township-wide population forecast is based upon the cohort-survival methodology. This provincially accepted approach assesses annual population by age and sex, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated



rate of net migration is added (in-migration to the Township less out-migration, by age group).

For comparative purposes, the most recent (Summer 2019) Ministry of Finance (M.O.F.) population projections for Cavan Monaghan have been reviewed and assessed. Recent Statistics Canada 2018 post-Census population estimates for Cavan Monaghan were also examined and compared to the short-term, Township-wide population forecast. Historical and forecast population trends are also considered at the regional and provincial level relative to Cavan Monaghan in accordance with historical Census data and approved municipal, regional and provincial forecasts. This analysis provides further insight into the Township's potential share of population growth relative to the broader regional market area.

Building on the above analysis, a recommended long-term permanent population and housing projection for Cavan Monaghan has been prepared. This forecast provides details with respect to population growth by age, sex, net migration, births, and deaths from 2016 to 2041, summarized in five-year increments.

Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy. Accordingly, Township-wide total housing growth has been generated from the population forecast by major age group using a headship rate forecast.

A headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e. cohort).¹ An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age. While major fluctuations in headship rates are not common over time, the ratio of household maintainers per capita varies by population age group. For example, a municipality with a higher percentage of seniors will typically have a higher household maintainer ratio per capita (i.e. headship rate) compared to a municipality with a younger population. This is because households occupied by seniors typically have fewer children than households occupied by adults under 65 years of age. Accordingly, forecast trends in population age structure provide important insights into future headship rates and persons per unit trends for the Township of Cavan Monaghan.

¹ It is noted that each household is represented by one household maintainer.



A key assumption regarding the housing forecast relates to projected trends in average household occupancy or persons per unit. As the Township's population ages over time, the average persons per unit across Cavan Monaghan is forecast to decline as the ratio of household maintainer per household increases. These trends have been closely examined across Ontario by Watson & Associates Economists Ltd. in similar studies and are reviewed herein for Cavan Monaghan.

- Forecast trends in households by type (i.e. singles/semi-detached, townhouses, and apartments) have been developed based on the following supply and demand factors:
- Historical housing activity based on Census data and building permit activity/housing completions;
- A high-level housing affordability analysis (household income trends vs. trends in housing prices by structure type);
- Housing propensity trends (i.e. demand) by structure type for Cavan Monaghan; and
- Consideration of the Township's appeal to families, empty-nesters, seniors, and seasonal residents.



Appendix E

Summary of Township- Wide and Employment Lands Growth Forecast (5-Year Increments), 2019 to 2041



APPENDIX E: SUMMARY OF TOWNSHIP-WIDE AND EMPLOYMENT AREAS GROWTH FORECAST (5-YEAR INCREMENTS), 2019 TO 2041

In generating the employment growth allocations to Millbrook, the following steps were undertaken:

- **Step 1: Remove Work-at-Home Employment**

Figure 5-8 in Chapter 5 identified forecast employment growth categorized into the four major categories of primary, industrial, commercial, and institutional based on 2016 Census data. These categories have been aggregated from specific employment sub-classifications based on the North American Industrial Classification (N.A.I.C.S.) system. As a first step, all estimated work at home and no fixed place of work employment has been excluded from the industrial land needs analysis, as these employees do not require land in designated industrial areas.

- **Step 2: Determine the Amount of Industrial, Commercial, and Institutional (I.C.I.) Employees on Employment Lands**

A breakdown of employment by I.C.I. sectors on Employment Areas for the Township of Cavan Monaghan was estimated using trends from recent non-residential development activity, building permits activity, and the Township's business directory. Figure E-1 presents the percentage of employment by I.C.I. on Employment Areas assumed during the long-term forecast period.



Figure E-1
Township of Cavan Monaghan Proportion of Employment Growth on Urban
Employment Lands by Major Employment Sector

Employment Sector	Percentage of Total Town Employment on Urban Employment Lands
Industrial	65%
Commercial	22%
Institutional	69%

Source: Derived from Watson & Associates Economists
Ltd., 2019.

Note may not add precisely due to rounding.

- **Step 3: Forecast Employment on Urban Employment Lands, 2019 to 2041**

Figure E-2 summarizes forecast employment on Employment Areas over the short-, medium- and long-term forecast periods, based on the assumed allocation of growth on Employment Areas assigned by I.C.I., as set out in Figure E-1. Over the 2019 to 2041 period, the Township's Urban Employment Lands are anticipated to accommodate approximately 44% of the Township's total employment growth, resulting in approximately 1,600 jobs.



Figure E-2
Employment Growth on Urban Employment Lands, 2019 to 2041

Employment by I.C.I.	Employment Growth by Sector						Employment Growth on Urban Employment Lands						Percent on Employment Lands (2041)
	2019 - 2021	2019 - 2026	2019 - 2031	2019 - 2036	2019 - 2039	2019 - 2041	2019 - 2021	2019 - 2026	2019 - 2031	2019 - 2036	2019 - 2039	2019 - 2041	
Primary	-	-	-	-	-	-	-	-	-	-	-	-	0%
Work at Home	39	110	182	254	279	296	-	-	-	-	-	-	0%
Industrial	68	533	828	1,146	1,305	1,411	45	346	538	745	848	917	65%
Commercial	187	557	805	1,101	1,246	1,342	41	122	177	242	274	295	22%
Institutional	40	211	305	419	466	497	27	145	211	289	322	343	69%
Total	334	1,410	2,121	2,920	3,296	3,547	113	614	926	1,276	1,444	1,556	44%

Source: Derived by Watson & Associates Economists Ltd., 2019.

Note: Numbers may not add precisely due to rounding.