



Employment Land Needs Assessment

Town of Halton Hills

Phase 1 Report Draft

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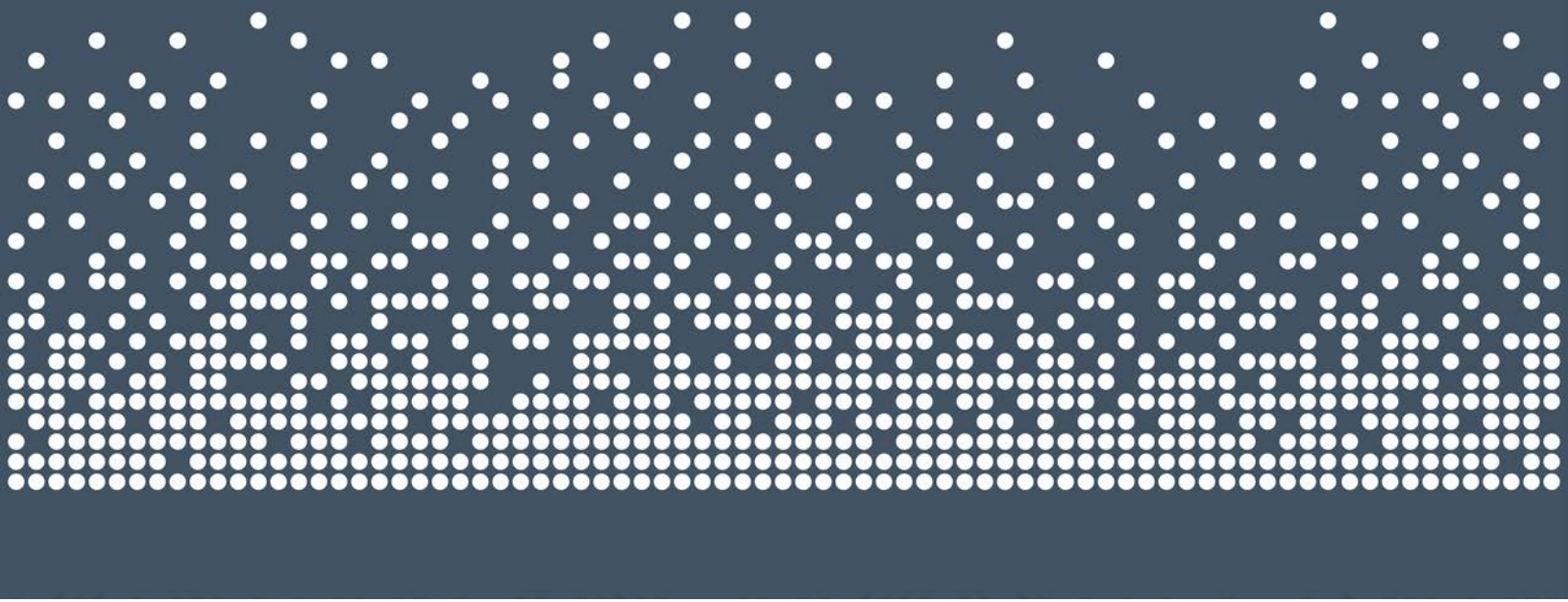
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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
F.S.E.A.	Future Strategic Employment Area
G.D.P.	Gross domestic product
G.F.A.	Gross floor area
G.G.H.	Greater Golden Horseshoe
G.T.A.	Greater Toronto Area
G.T.A. W.C.P.A.	Greater Toronto Area West Corridor Protection Area
G.T.H.A.	Greater Toronto and Hamilton Area
IMF	International Monetary Fund
L.Q.	Location Quotients
NAICS	North American Industry Classification System
N.F.P.O.W.	No Fixed Place of Work
O.P.	Official Plan
O.P.A.	Official Plan Amendment
P.P.S.	Provincial Policy Statement
P.S.E.Z.	Provincially Significant Employment Zone
T.P.I.A.	Toronto Pearson International Airport
U.S.	United States



Executive Summary



Executive Summary

The primary objective of this assignment is to provide a comprehensive review of the Town's designated employment lands, building on past studies prepared for the Town of Halton Hills and the Region of Halton, as well as future regional/local economic and development trends. This review is necessary to ensure that there is an adequate supply of non-residential lands to accommodate long-term demand and to satisfy the Town's employment objectives. This study forms an important background document to the Town's Official Plan (O.P.) review and is intended to provide important input into Phase 1 of the Halton Region Integrated Growth Management Strategy. To ensure that the Town's Employment Areas remain competitive, this study examines the Town's applicable O.P. policies within the context of the provincial policy and Regional framework, against anticipated economic trends and consumer demand patterns.

Employment lands form a vital component of Halton Hills's land-use structure and are an integral part of the local economic development potential of the economic region. They are also home to many of the Town's largest private-sector employers. Through development of its industrial land base, the Town is better positioned to build more balanced, complete and competitive communities. As such, a healthy balance between residential and non-residential development is considered an important policy objective for the Town of Halton Hills and the surrounding economic region.

The Town faces a number of opportunities and challenges with respect to the management and growth of its existing and future Employment Areas in light of the evolving structural changes in the economy and disruptive factors which continue to influence the nature of the economy. One of these challenges relates to macro-economic trends over which the Town 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.

In contrast to the above, Halton Hills has considerable control and ability to position itself in a positive manner when considering the Town's regional competitive ranking. This requires the Town to continue marketing itself as a hub for innovation, equipped with the human capital that is required to encourage on-going innovation, entrepreneurship, small business development and local investment retention. A major factor for the future competitiveness of the Town's economic base relates to the structure, quality and "readiness" of its employment lands.

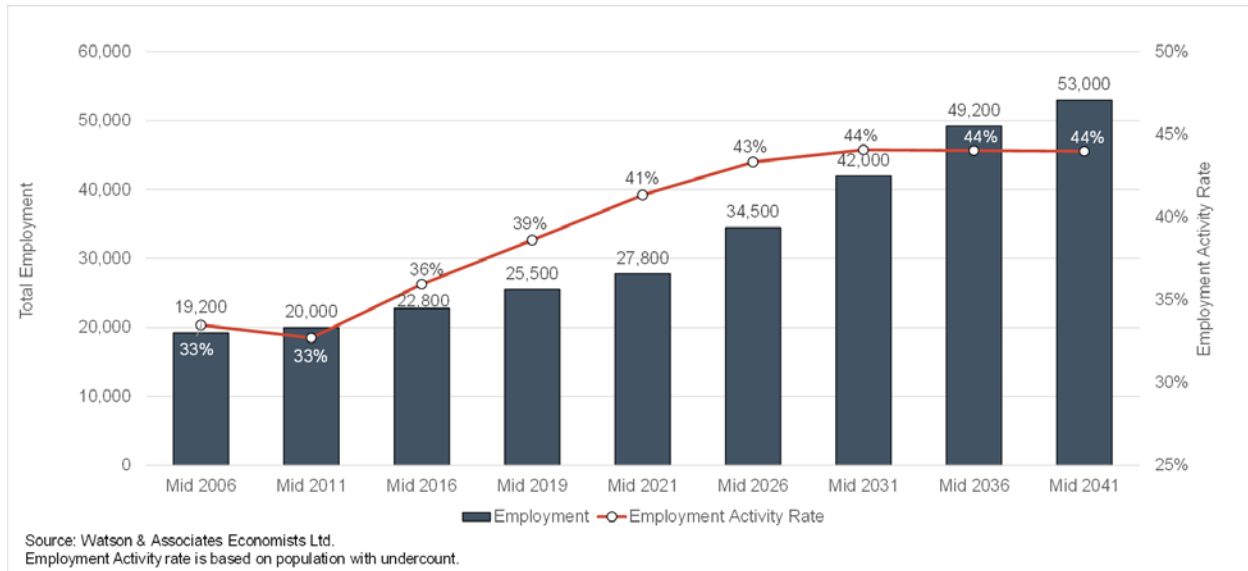


Over the next several decades the Town's employment base is anticipated to steadily grow across a broad range of export-based and population serving employment sectors. The Town, however, will be competing to attract and retain these sectors with other municipalities across the Greater Golden Horseshoe (G.G.H.) and beyond. To ensure the long-term competitiveness, growth and diversity of the Town's economy, planning and marketing efforts must be geared toward both the broader strengths of the Town and its communities, as well as specific target sector investment attraction efforts. To accommodate the steadily growing economic base within Halton Hills, the Town's land-use planning policies must anticipate the evolving nature of the local and regional economy and reflect the diverse needs of industry and businesses of all sizes over the long term. These policies must also offer a degree of flexibility and nimbleness that allows for relatively rapid responses to unforeseen changes, which can be a critical competitive advantage relative to competitive markets.

As summarized in Figure ES-1, the Town's employment base is forecast to reach approximately 53,000 by 2041. This represents an increase of approximately 27,500 jobs from today to 2041, or an annual employment growth rate of 3.4%. Over the long term, additional employment is expected to provide increasing local job opportunities for the residents of Halton Hills and improve the Town's employment-to-population balance. Between 2019 and 2041, the Town's employment activity rate (ratio of jobs to population) is forecast to increase from 39% to 44%.



Figure ES-1
Town of Halton Hills
Employment Forecast by Sector, 2019 to 2041



Between 2019 and 2041, almost half of all employment growth across the Town of Halton Hills is anticipated to be accommodated within the Town’s existing and future planned Employment Areas. Forecast demand on employment lands is anticipated across a range of industrial sectors including warehousing and distribution, wholesale trade, manufacturing, construction and utilities.

In addition to the above-mentioned traditional industrial sectors, market demand on employment lands has been increasingly driven by growth in the “knowledge-based” or “creative class” economies, including employment sectors such as advanced manufacturing, professional, scientific and technical services, finance, insurance, real estate, information and culture, health, and education. With an increasing emphasis on these knowledge-based sectors, major office, flex office and multi-purpose facilities encompassing office, non-office and employment-supportive uses will become an increasingly dominant built form across the Town’s Employment Areas.

In contrast to other urban land uses (e.g. commercial and mixed-use areas), employment lands provide the opportunity to accommodate export-based employment sectors that cannot be easily accommodated in other areas of the Town. In order for the Town of Halton Hills to continue to be competitive and attractive to a broad range of industrial and commercial sectors, the Town needs to ensure that it has a sufficient



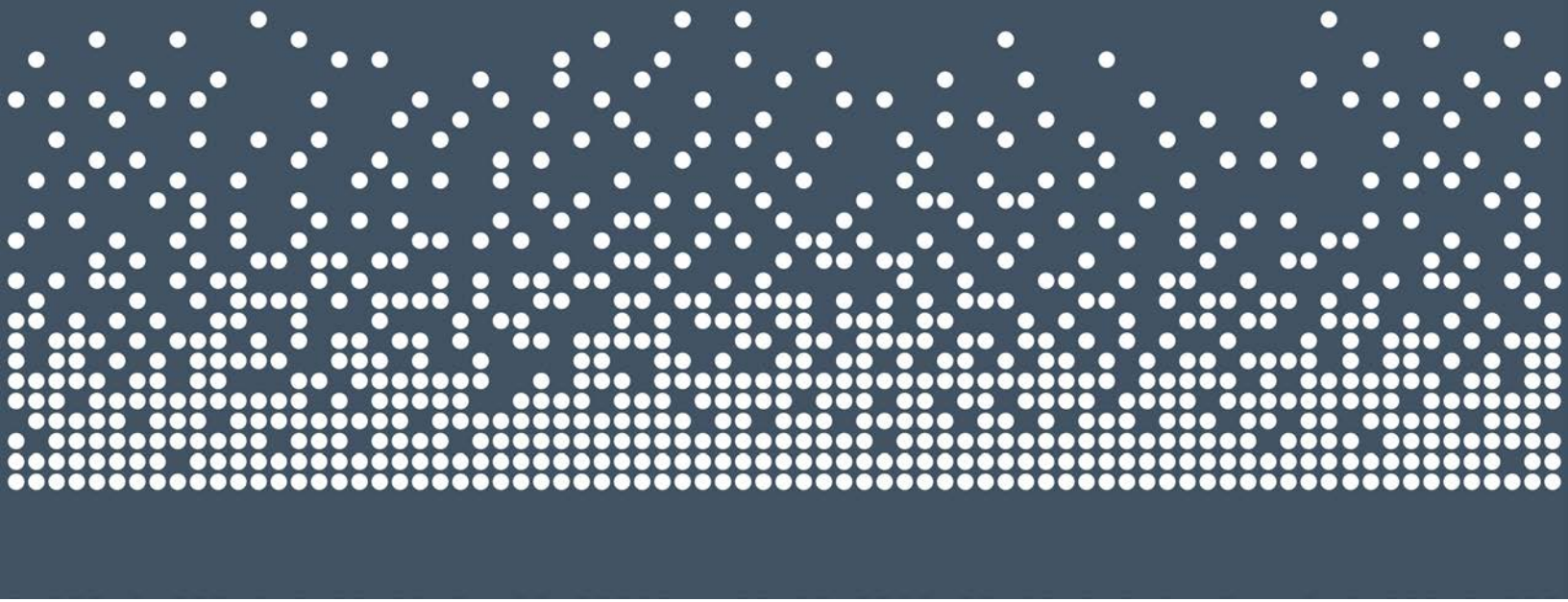
supply and market choice of serviced employment lands. Most notably, this should include medium to larger sites (larger than 3 hectares/7 acres) with good transportation access and proximity to major highway interchanges as well as other local/regional transportation infrastructure.

Across the G.T.H.A. the industrial market continues to remain strong with respect to annual development activity and land absorption. This trend has also been experienced more locally within the Town of Halton Hills. As such, the Town's inventory of designated, vacant lands within its established Employment Areas is diminishing. Currently, the Town's remaining inventory of designated, vacant employment lands available over the forecast horizon is estimated at 376 net ha (929 net acres),¹ of which approximately 89% is located in the Premier Gateway Employment Area.

To accommodate forecast employment lands employment growth, an additional 270 net ha (667 net acres) or 338 gross hectares (835 gross acres) of lands are recommended to be brought into the Town's urban boundary and designated as Employment Area. This land need assumes that the O.P.A. 31B lands will be designated and available by 2041. It is recommended that the Town of Halton Hills continue to advance O.P.A. 31B which will bring approximately 75 net ha (185 net acres) of lands identified as Future Strategic Employment Area into the urban area as an Employment Area. Further, working with the Region of Halton, the Town should peruse designating additional Future Strategic Employment Area lands to the urban area of the Premier Gateway Employment Area.²

¹ Based on adjusted to the G.T.A. West Corridor Protection Area, as discussed in Chapter 6.

² It is noted that the ultimate delineation of this Employment Area will be impacted by the outcome of the G.T.A. West Corridor. The report assumes a more refined G.T.A. West Corridor Protection Area.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

The primary objective of this assignment is to provide a comprehensive review of the Town's designated employment lands, building on past studies prepared for the Town of Halton Hills and Region of Halton as well as future regional/local economic and development trends. This review is necessary to ensure that there is an adequate supply of non-residential lands to accommodate long-term demand and to satisfy the Town's employment objectives. This study forms an important background document to the Town's Official Plan (O.P.) review and is intended to provide important input into Phase 1 of the Halton Region Integrated Growth Management Strategy.

To ensure that the Town's Employment Areas remain competitive, this study examines the Town's applicable O.P. policies within the context of the Provincial Policy and Regional framework, against anticipated economic trends and consumer demand patterns.

1.2 What are Employment Lands and Why are They Important to the Town?

Employment lands (also known as industrial lands) typically include a broad range of designated lands, including light, medium and heavy industrial lands, business parks and rural industrial lands. Employment lands accommodate primarily export-based employment, including a wide range of industrial uses (e.g. manufacturing, distribution/logistics, transportation services), as well as specific commercial and institutional uses (e.g. office, service, ancillary/accessory retail) which generally support the industrial/business function of the Town's Employment Areas. A further discussion of the Town's Employment Areas within the context of current planning policy is provided in Chapter 2.

Employment lands form a vital component of Halton Hills's land-use structure and are an integral part of the local economic development potential of the economic region. They are also home to many of the Town's largest private-sector employers. Through development of its industrial land base, the Town is better positioned to build more balanced, complete and competitive communities. Development typically



accommodated on employment lands generates relatively strong economic multipliers (i.e. spin-off effects) that benefit the Town of Halton Hills directly and indirectly. In addition, employment lands development typically generates high-quality employment opportunities which can improve local socio-economic conditions (i.e. live/work opportunities). Furthermore, achieving non-residential growth adds to a community's assessment base, which can help support competitive property taxes and stronger municipal service levels. Industrial land development also tends to produce more positive net fiscal benefits for the community than other types of development (e.g. residential and retail). Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the Town of Halton Hills and the surrounding economic region.

In contrast to other urban land uses (e.g. commercial and mixed-use areas), employment lands provide the opportunity to accommodate export-based employment sectors that cannot be easily accommodated in other areas of the Town. In order for the Town of Halton Hills to continue to be competitive and attractive to a broad range of industrial and commercial sectors, the Town needs to ensure that it has a sufficient supply and market choice of serviced employment lands. Most notably, this should include medium to larger sites (larger than 3 hectares/7 acres) with good transportation access and proximity to major highway interchanges as well as other local/regional transportation infrastructure.

1.3 Context

The Town faces a number of opportunities and challenges with respect to the management and growth of its existing and future Employment Areas, in light of the evolving structural changes in the economy and disruptive factors. Ultimately, this will continue to influence the manner in which municipalities plan for their Employment Areas.

Like all Canadian regions, the Greater Toronto Hamilton (G.T.H.A.) regional economy is transitioning away from goods production and towards services delivery. These structural changes in the broader economy are altering the nature of economic activities on employment lands and impacting the built form and character of these lands. Recent market demand on employment lands has been increasingly driven by growth in the



“knowledge-based” or “creative class” economies, including employment sectors such as advanced manufacturing, professional, scientific and technical services, finance, insurance, real estate, information and culture, health, and education. With an increasing emphasis on these knowledge-based sectors, major office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming an increasingly dominant built form within Employment Areas.



Gino Pizza Head Office and Warehouse, 25 Brownridge Road, Premier Gateway Employment Area

The nature of traditional industrial processes is also rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. Emerging export-based subsectors have siting, space and built-form requirements that are significantly different from traditional manufacturing. Anticipating and responding to the evolving needs of industry will be necessary for the Town to better position itself for sustained growth, particularly in leading sectors. Recognizing these recent structural changes in the regional economy, there has been a shift in planning philosophy that calls for developing Employment Areas to provide for a wider range of amenities and employment-supportive uses which complement both knowledge-based and traditional industrial sectors.

When considering its regional competitive ranking, the Town has considerable control and ability to position itself in a positive manner. This requires the Town to continue marketing itself as a hub for innovation, equipped with the human capital that is required to encourage on-going innovation, entrepreneurship, business development and local investment retention. A major factor for the future competitiveness of the Town's economic base is the structure and quality of its employment lands.



Over the next several decades the Town's employment base is anticipated to steadily grow across a broad range of export-based and population serving employment sectors. The Town, however, will be competing to attract and retain these sectors along with other municipalities across the Greater Golden Horseshoe (G.G.H.) and beyond. To ensure the long-term competitiveness, growth and diversity of the Town's economy, planning and marketing efforts must be geared toward both the broader strengths of the Town and its communities, as well as specific target sector investment attraction efforts. To accommodate the steadily growing economic base within Halton Hills, the Town's land-use planning policies must anticipate the evolving nature of the local and regional economy and reflect the diverse needs of industry and businesses of all sizes over the long term. These policies must also offer a degree of flexibility and nimbleness that allows for relatively rapid responses to unforeseen changes, which can be a critical competitive advantage relative to competitive markets.



An example of an office building on employment lands in the G.T.A., 10 Parr Road, Caledon, ON

1.4 Project Process

This report has been developed under a two-phased approach, as follows:

Phase 1: Technical Background Report

Phase 1 includes a technical analysis and policy review which addresses recent economic and development trends within the current land-use policy framework at provincial, regional and local levels. Included is an analysis of existing employment land supply with regard to vacant land inventory and future intensification potential. An analysis of long-term employment land demand analysis is also provided, which considers market conditions, competitiveness, as well as macro-economic factors and trends which are anticipated to influence future employment growth by sector. Based on this detailed analysis, forecast employment growth, and corresponding employment land needs are assessed to the 2041 planning horizon.



Phase 2: Strategic Planning and Economic Development Recommendations

Phase 2 will build on the results of Phase 1, forming the Town's Employment Lands Strategy. This phase will focus on employment land conversions (where appropriate), analysis of GO station areas within the Town and strategic planning policy related to the planning of the Town's existing and future Employment Areas.



Chapter 2

Employment and Planning Policy Review



2. Employment and Planning Policy Review

This chapter provides an overview of the relevant provincial, regional and local policies which apply to employment land planning in the Town of Halton Hills. These policies will provide a framework for the analysis and policy directions.

2.1 Provincial Policy Context

The three key provincial policy documents that apply to employment lands are the Provincial Policy Statement, 2014 (P.P.S.), the Growth Plan for the Greater Golden Horseshoe (“Growth Plan”), and the Greenbelt Plan (2017). The policies set out in these documents outline provincial land-use planning interests and provide high-level policy direction for municipalities.

2.1.1 Provincial Policy Statement

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.

Section 1 of the P.P.S. outlines policies on “Building Strong Healthy Communities.” This section promotes strong, livable and healthy communities and requires that municipalities:

- Protect the environment, public health and safety;
- Provide the appropriate mix and range of employment, including industrial and commercial;
- Promote economic development and competitiveness including “maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses” (section 1.3);
- Promote economic development and competitiveness by encouraging compact, mixed-use development that incorporates compatible employment uses to support livable communities;



- Protect Employment Areas in proximity to major Goods Movement facilities and corridors for employment uses that require those locations;
- Provide an appropriate mix and range of employment types to meet long-term needs;
- Provide opportunities for a diversified economic base;
- Promote opportunities for economic development and community investment-readiness;
- Encourage compact, cost-effective development patterns;
- Focus major employment on sites well served by transit or design them to facilitate future transit; and focus freight-intensive land use to areas well served by major highways; and
- Ensure that necessary infrastructure is made available.

Specific policies relevant to the conversion and protection of Employment Areas can be found in the P.P.S. The conversion of Employment Areas to Non-Employment Areas may occur only where it has been demonstrated that the land being converted is not required for employment purposes over the long term and that there is a need for the conversion (P.P.S., s. 1.3.2). The protection of employment lands from potential conversion only applies if the municipality has O.P. policies in place dealing with employment land conversions. The policies also allow municipalities to protect employment lands beyond 20 years provided the lands are not designated beyond 2041, which is the alternate planning horizon established by the Growth Plan (P.P.S., s. 1.3.2.4 and s. 1.1.2). The Growth Plan provides more detailed policies for protection and conversion and is discussed below in section 2.1.2.

2.1.2 Growth Plan for the Greater Golden Horseshoe

The Growth Plan, which was created under the *Place to Grow Act, 2005*, was updated in May 2017. It sets out where and how growth will occur across the Greater Golden Horseshoe to 2041 and all planning decisions shall conform to it. The Growth Plan provides growth forecasts for single and upper-tier municipalities and provides policy direction for a range of areas including land use, infrastructure, and transportation. Relevant aspects of the Growth Plan for this study are:

- Growth will be directed to settlement areas and within settlement areas it will be focused on 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;
- In general, the development of Employment Areas should be transit supportive, compact and minimize surface parking;
- Municipalities should preserve lands within settlement areas in the vicinity of major highway interchanges, ports, rail yards and airports for manufacturing and associated retail, office and ancillary facilities where appropriate;
- New minimum density targets have been created for the horizon of the Growth Plan for upper-tier and single-tier municipalities. The greenfield minimum density target is 80 jobs residents and jobs combined per ha. It is important to note that that the greenfield density targets established in the 2017 Growth Plan no longer includes employment lands.¹ According to the Growth Plan, Upper- and single-tier municipalities, in consultation with lower-tier municipalities, the provinces, and other appropriate stakeholders, will each develop an employment strategy that includes establishing a minimum density target.²
- Minimum density targets are also set out in the Growth Plan for transit corridors and stations areas. Minimum density targets are 60 residents and jobs combined per ha for areas served by light rail transit or bus rapid transit or 150 residents and jobs combined per hectare for lands served by the GO Transit rail network. The Town of Halton Hills does not have any designated Employment Areas that are within a transit corridor or station area (Go Train).

The 2017 Growth Plan introduces some new terms including:

- “Prime Employment Area” which is defined as “areas of employment within settlement areas that are designated in an official plan and protected over the

¹ As per the Growth Plan for the Greater Golden Horseshoe (2017), Section 2.2.7 pg. 23 and 24.

² Ibid.



long term for uses that are land extensive or have low employment densities and require locations that are adjacent to or near major goods movement facilities and corridors. These uses include manufacturing, warehousing, and logistics, and appropriate associated uses and ancillary facilities;”

- “Economic Employment Districts” which are “areas that have been identified by the Minister that are to be planned and protected for locally significant employment uses. These areas are not settlement areas;” and
- “Office Parks” which are “employment areas designated in an official plan where there are significant concentrations of offices with high employment densities.”



In dealing with employment, the Growth Plan indicates:

- Economic development and competitiveness will be promoted by: making more efficient use of Employment Areas and increasing employment densities; ensuring sufficient land for employment; connecting higher employment densities with transit; and integrating land-use planning and economic development goals to attract investment;
- Major office will be directed to urban growth centres, major transit station areas or other strategic growth area;
- Surface parking will be minimized and active transportation networks and transit-supportive built form will be facilitated when planning for employment;
- Upper-tier (in this case the Region) and single-tier municipalities, through a municipal comprehensive review, will develop an employment strategy that establishes a minimum density target of jobs per hectare for all Employment Areas and identifies opportunities for intensification of Employment Areas;
- Planning for employment areas, except for prime employment areas, will prohibit residential development and limit other sensitive uses not ancillary to the primary employment use, prohibit major retail or establish a size or threshold for major



retail uses, and integrate Employment Areas with adjacent Non-Employment Areas and develop mixed-use area and innovation hubs where appropriate;

- Planning for prime Employment Area will prohibit residential, institutional and other sensitive uses, prohibit major retail and office uses, and plan for freight-supportive land-use patterns;
- Conversion of lands within Employment Areas to non-employment uses will only be permitted through a municipal comprehensive review if:
 - There is a need for the conversion;
 - The lands are not required for employment over the horizon of the Growth Plan;
 - There will be sufficient employment land to accommodate the forecast employment growth to the horizon of the Plan;
 - The proposed uses would not adversely affect the overall viability of the Employment Area or minimum intensification and density targets; and
 - There is existing or planned infrastructure and public service facilities to accommodate the proposed use; and
- Any new or expanded opportunities for retail in an Employment Area may only happen through a municipal comprehensive review.

The Growth Plan provides population and employment forecasts for upper-tier and single-tier municipalities which will apply throughout a municipal comprehensive review. Table 2-1 illustrates the population and employment forecasts for Halton Region. The Region of Halton is expected to grow by 255,000 people and 130,000 jobs between 2016 and 2031, and by 435,000 people and 210,000 jobs between 2016 and 2041. The Region of Halton had approximately 565,400 people¹ and 260,200 jobs in 2016.

¹ 2016 population base includes a Census undercount adjustment of approximately 3%.



Table 2-1
Growth Plan Population and Employment Projections

Growth Plan 2017 Forecast*						
Halton Region	Population			Employment		
	2031	2036	2041	2031	2036	2041
	820	910	1,000	390	430	470

*Figures shown represent thousands (i.e. 000s).

2.1.3 Growth Plan for the GGH – Proposed Amendment #1

On January 15 2019, the Ministry of Municipal Affairs and Housing brought forward a proposed amendment to the Growth Plan Growth Plan for the Greater Golden Horseshoe, 2017. Ministry of Municipal Affairs and Housing is seeking feedback on the proposed changes by February 28, 2019. Key proposed changes to the Growth Plan outlined in Amendment #1 that are relevant for planning for Employment Areas in Halton Hills include the following:

- The concept, policy and definition of Prime Employment Area has been removed.
- Policy direction is provided in regard to the concept of land use compatibility between sensitive land uses, major retail uses and major offices and industrial, manufacturing or other uses particularly vulnerable to encroachment (Policy 2.2.5.8).
- The term “Employment Strategy” has been removed. The technical requirements related to Employment Areas, including a land needs assessment, a review of intensification opportunities and the setting of density targets that reflect current and anticipated type and scale of employment are still required.
- Allows for the conversion of employment lands to a designation that permits non-employment in advance of MCR, provided that (Policy 2.5.1.10):
 - There is a need;



- No adverse effects on the viability of an employment area or achievement of minimum intensification targets;
 - There are existing or planned services in place; and
 - Significant amount of jobs are maintained on the lands.
- The Minister may identify Provincially Significant Employment Zones (P.S.E.Z.) to support coordination of planning for jobs and economic development at the regional scale (Policy 2.5.1.12). These lands identified cannot be converted using Policy 2.2.5.10. At this time, the Ministry has prepared a Proposed Framework for the P.S.E.Z. and has identified 29 P.S.E.Z. in the G.G.H. Within the Town of Halton Hills, there is a P.S.E.Z. south of Steeles Avenue in the Premier Gateway Employment and a P.S.E.Z. in the Mansewood Industrial Area. Refer to Appendix B for a map of the P.S.E.Z. in the northern Halton Region and surrounding area.

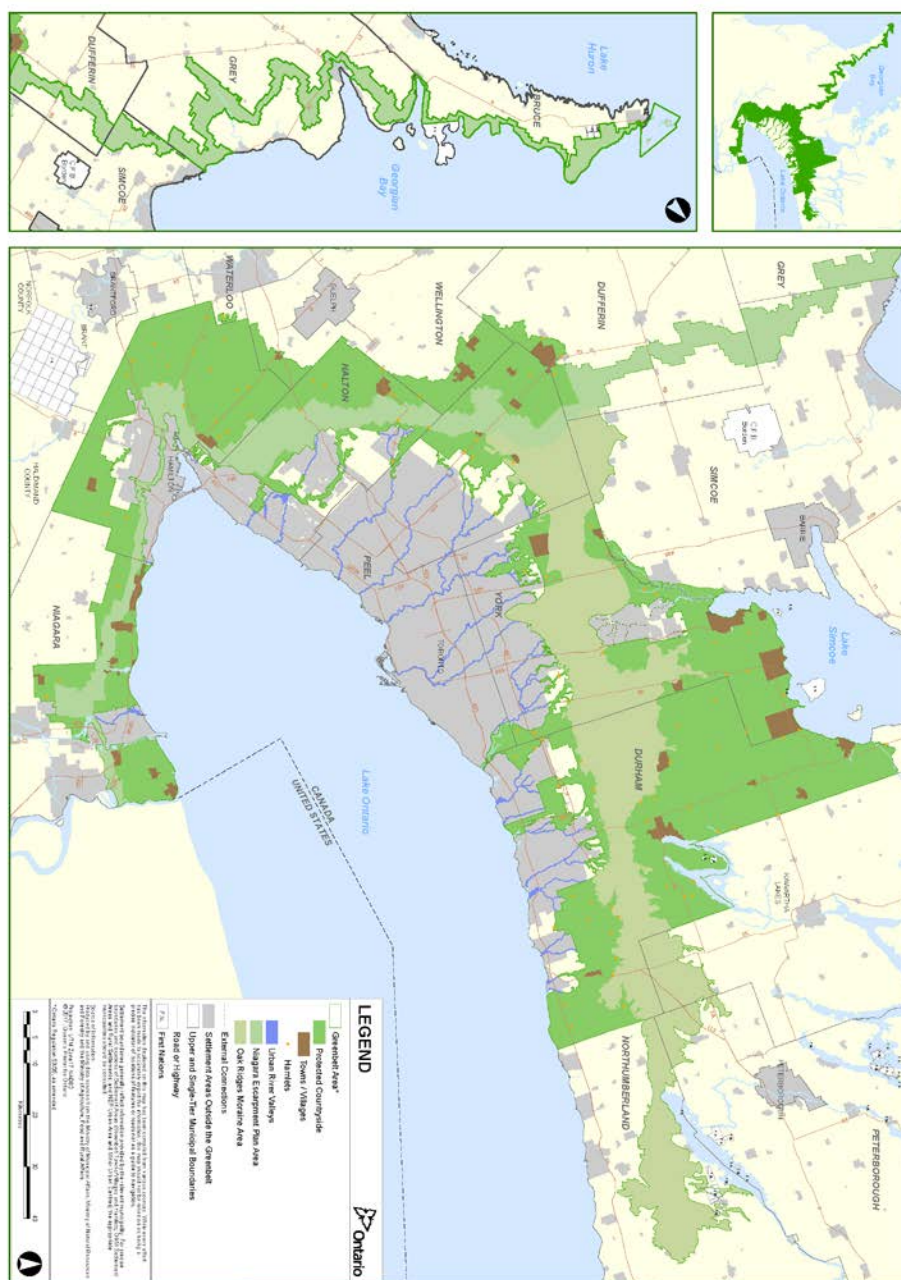
2.1.4 Greenbelt Plan (2017)

The Growth Plan provides the framework for where and how urban growth should occur in the G.G.H. The Greenbelt Plan was established to provide a parallel framework for environmental management and protection in the same general area as the Growth Plan. It is important to note that it applies to the environment, although there are no explicit employment or commercial land policies. The Greenbelt Plan includes the protection of lands designated under the Niagara Escarpment Plan and Oak Ridges Moraine Plan and allows for the protection and management of prime agricultural and specialty crop lands across the G.G.H.

Some lands within the Town of Halton Hills are subject to the policies of the Greenbelt Plan. Figure 2-1 shows the limits of the protected countryside Greenbelt Area in the Town of Halton Hills. Lands in the protected countryside are subject to the entirety of the Greenbelt Plan.



Figure 2-1
Greenbelt Plan Area





2.2 Regional Policy

2.2.1 *Halton Region Official Plan*

The Region of Halton's Official Plan (Regional O.P.) provides broad policy directions on strategic matters to guide growth and development within the Region. The document was last consolidated September 28, 2015. Local O.P.s must conform to the Regional O.P.

The Regional O.P. establishes a Regional Structure as shown on Figure 2-2. The Regional Structure identifies a variety of land uses including Urban Areas and creates Employment Areas as an overlay on top of the Urban Area.

Employment

The Employment Area policies plan for, protect and preserve the Employment Areas and prohibit residential and other non-employment uses, including major retail, in Employment Areas except uses permitted in the local O.P. as of December 16, 2009, or institutional uses permitted in the local O.P., subject to a detailed study that sets limits and criteria. Additional Employment Areas may be introduced within the Urban Area by amendment based on the completion of an area-specific plan or an amendment to the local O.P.

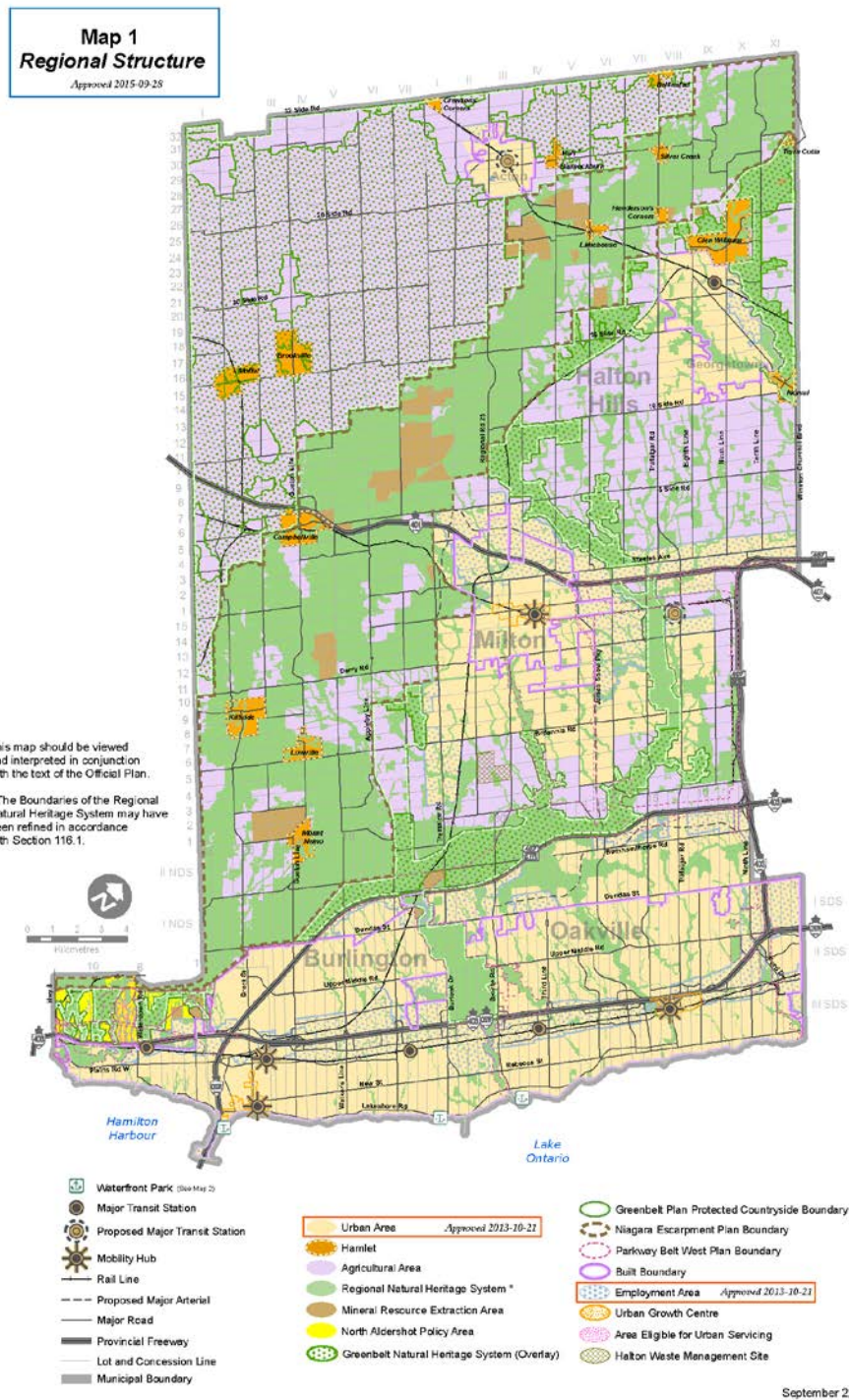
The policies also require local municipalities to prohibit the conversion of land within Employment Areas to non-employment uses, including major retail, unless through a municipal comprehensive review in accordance with the criteria established in the Growth Plan as well as considering cross-jurisdictional matters and meeting all Regional policies and requirements, financial or otherwise.

Local municipalities must promote intensification and increased densities in new and existing Employment Areas.

The economic development policies state that the Region will ensure, through municipal comprehensive reviews, as well as through provisions in local O.P.s and zoning by-laws, a ten-year supply of employment lands at all times for the Region as a whole and the protection of employment lands for economic development to 2031.



Figure 2-2
Regional Structure Excerpt from Regional O.P. Map 1





Certain areas are also designated as “Future Strategic Employment Area” on Map 1C to the Regional O.P. as shown on Figure 2-3. The purpose of that designation “is to protect from incompatible uses certain lands that are strategically located with respect to major transportation facilities and existing Employment Areas, and are best suited to employment beyond the planning horizon of this Plan.” Further, Regional policy prohibits re-designation of these lands “to uses that are incompatible with employment uses in the long term, especially non-farm uses such as institutional and recreational uses” (sections 139.6 and 139.7(1)). These lands, however, will only be considered for inclusion into the Urban Area prior to 2031 through a municipal comprehensive review as part of the Region’s statutory five-year review of its O.P.

Table 2-2
Town of Halton Hills Growth Forecast

Type	2016 ¹	2031	Growth
Population	63,000	94,000	31,000
Employment	24,000	43,000	10,000

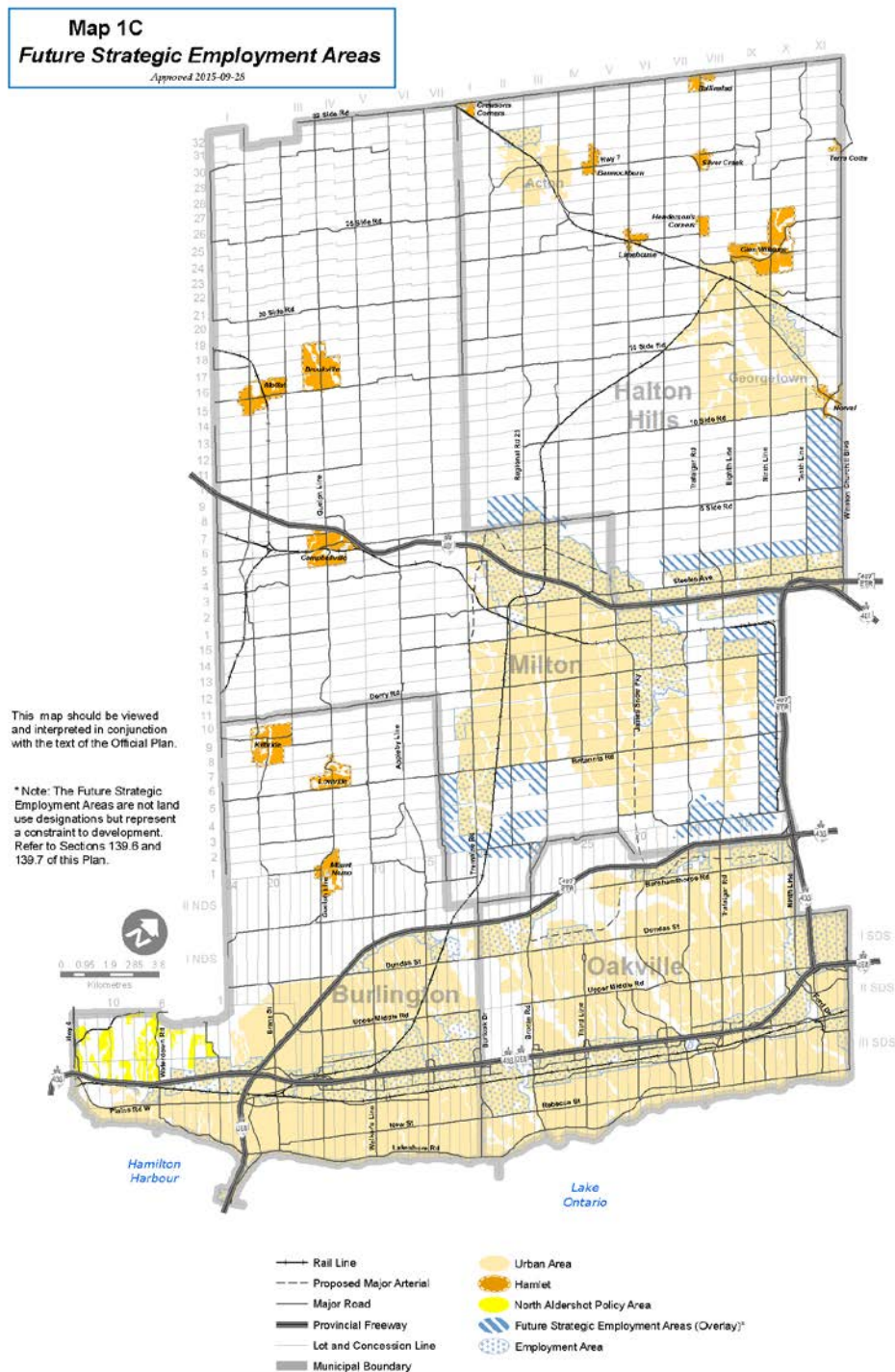
Source: Halton Region O.P.

¹ 2016 population adjusted for the Census undercount.

Halton Hills is currently required by the Region to have a minimum overall development density in designated greenfield areas of 39 residents and jobs per gross hectare. The Regional structure is based on a population and employment distribution of 94,000 people and 43,000 employment jobs in Halton Hills in 2031 (up from 63,000 and 24,000, respectively, in 2016). Employment growth is not expected to occur in an even manner regarding the Halton Hills employment forecast, with greater growth happening after 2022.



Figure 2-3
Future Strategic Employment Areas Excerpt from Regional O.P. Map 1C





2.3 Local Policy Context

2.3.1 *Town of Halton Hills Official Plan*

The Town of Halton Hills Official Plan applies to all lands within the Town. Part of the Town's Vision statement states that,

“Encouraging additional economic development in the Town is also a key goal of this Official Plan. The establishment of a positive business environment that provides jobs and prosperity to Town residents is a key component of this Plan. On this basis, the Official Plan promotes the development of the newly emerging 401-407 Employment Corridor Area for prestige industrial uses and encourages general industrial uses within employment areas located in Acton and Georgetown.”

The following subsections outline the important employment land use policies.

Employment

Employment uses are outlined in section D3 of the Town of Halton Hills Official Plan. The Employment Area designation recognizes existing industrial areas in Acton and Georgetown and the emerging 401/407 Corridor, which is to be developed for prestige industrial uses” (section D3.2). Further, it is the intent of the Plan “that an adequate supply of employment land is available at all times in the Town,” with the Plan noting that “the only area that could accommodate large-scale employment growth is located in the 401/407 Employment Corridor Area” (section D3.3). Lands designated for employment uses are intended to protect the supply of employment lands in order to preserve the long-term economic health and vitality of the Town. The Employment Area designations recognize existing industrial areas in Acton, Georgetown and Mansewood, as well as the emerging 401/407 Corridor, which will be developed for prestige industrial uses.

The policies prohibit the conversion of land within Employment Areas to non-employment uses, including major retail, unless through a municipal comprehensive review where it has been demonstrated that various criteria have been addressed. The criteria reflect those established in the Regional O.P.

The policies also prohibit residential and other non-employment uses, including major retail, except recognized permitted uses in the Prestige Industrial Area and Gateway



Area designation, and small-scale institutional uses based on a detailed study addressing specific criteria.

The General Employment designation applies in Acton, Georgetown and Mansewood. The main permitted uses are: industrial uses within wholly enclosed buildings, such as manufacturing, assembling, processing, fabricating, warehousing, wholesaling and distribution facilities; industrial uses that involve outdoor storage and/or processing such as concrete batching plants, aggregate transfer stations and contractors' establishments, subject to policies; research and training establishments; computer, electronics and data processing facilities; printing and associated service establishments; and industrial malls, containing one or more of the uses permitted in this designation. It does not permit asphalt plants.

Secondary uses in the General Employment designation are subject to restrictions and include: commercial self-storage establishments; freestanding office buildings; commercial fitness centres; restaurants; day nurseries subject to provisions; private and commercial schools subject to provisions; and, motor vehicle repair establishments and motor vehicle body shops.

Figures 2-4, 2-5 and 2-6 present the lands designated under the land-use categories discussed above.

The 401/407 Employment Corridor area is referred to as the Premier Gateway Employment Area. The Phase 1 area is located on both sides of Steeles Avenue between the Town of Milton and Eighth Line to take advantage of the area's accessibility. The main employment designations are Prestige Industrial Area and Gateway Area.



Figure 2-4
Land Use Plan Excerpt from Town of Halton Hills O.P. Schedule A1

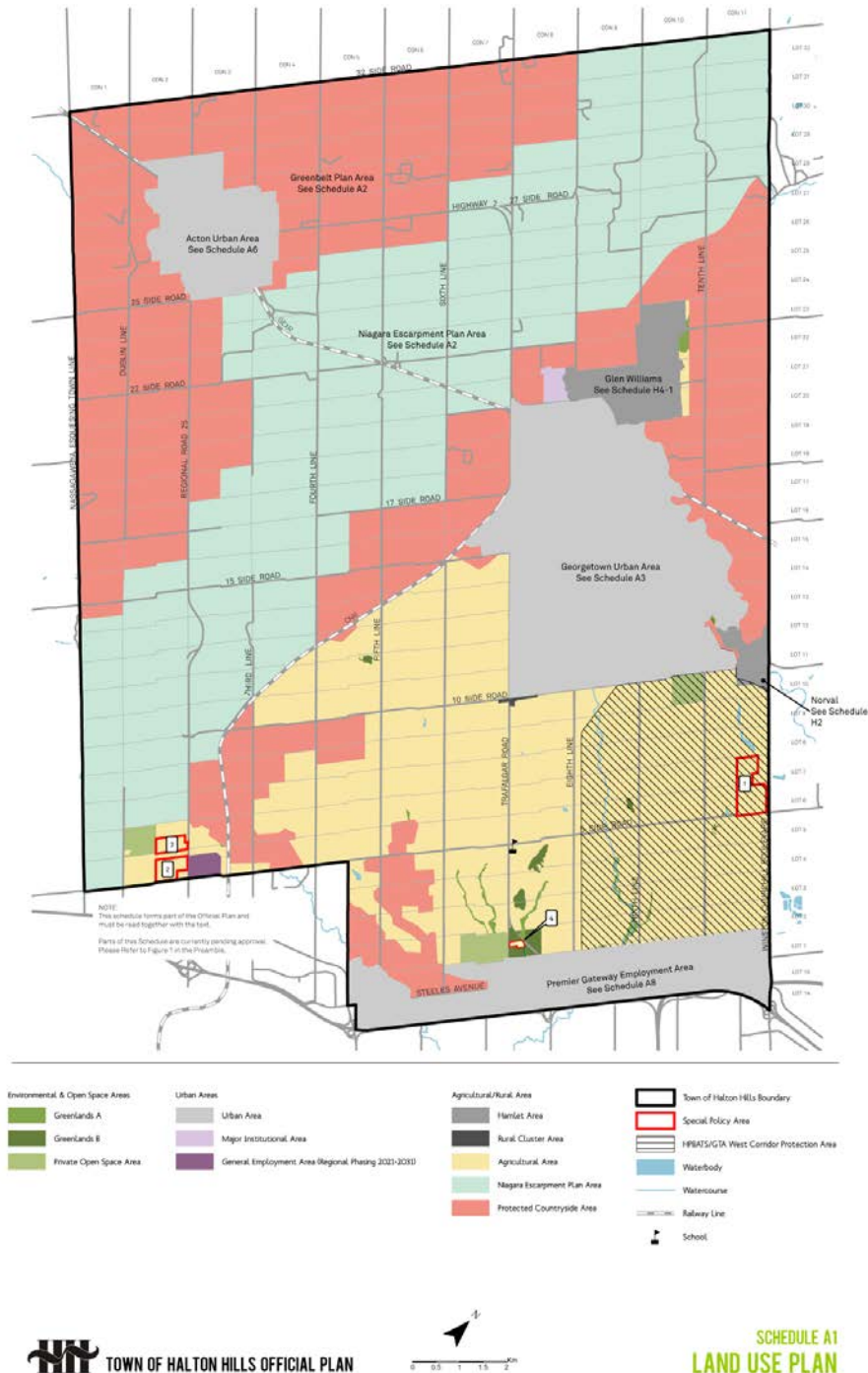




Figure 2-5
Georgetown Urban Area Excerpt from Town of Halton Hills O.P. Schedule A3

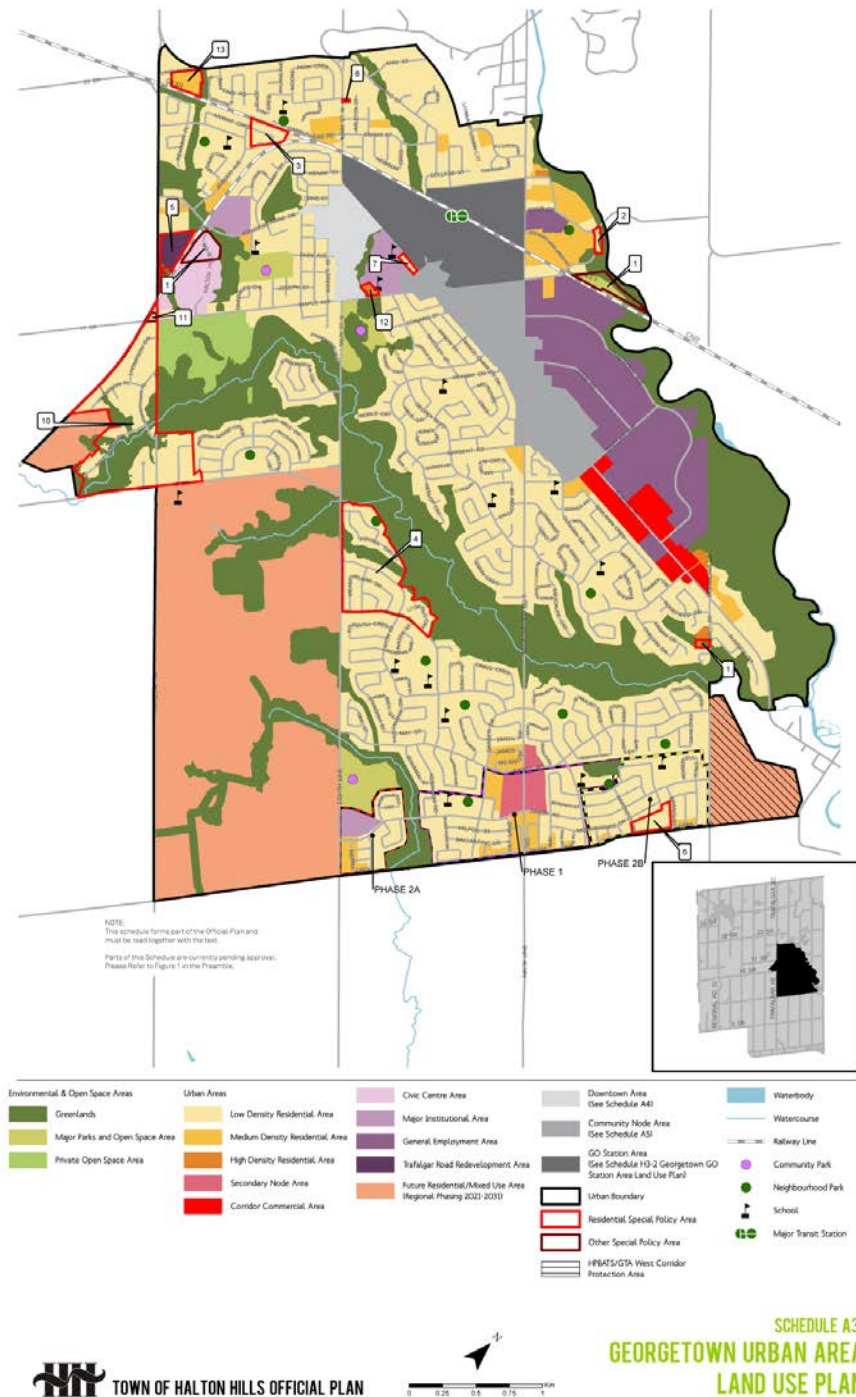
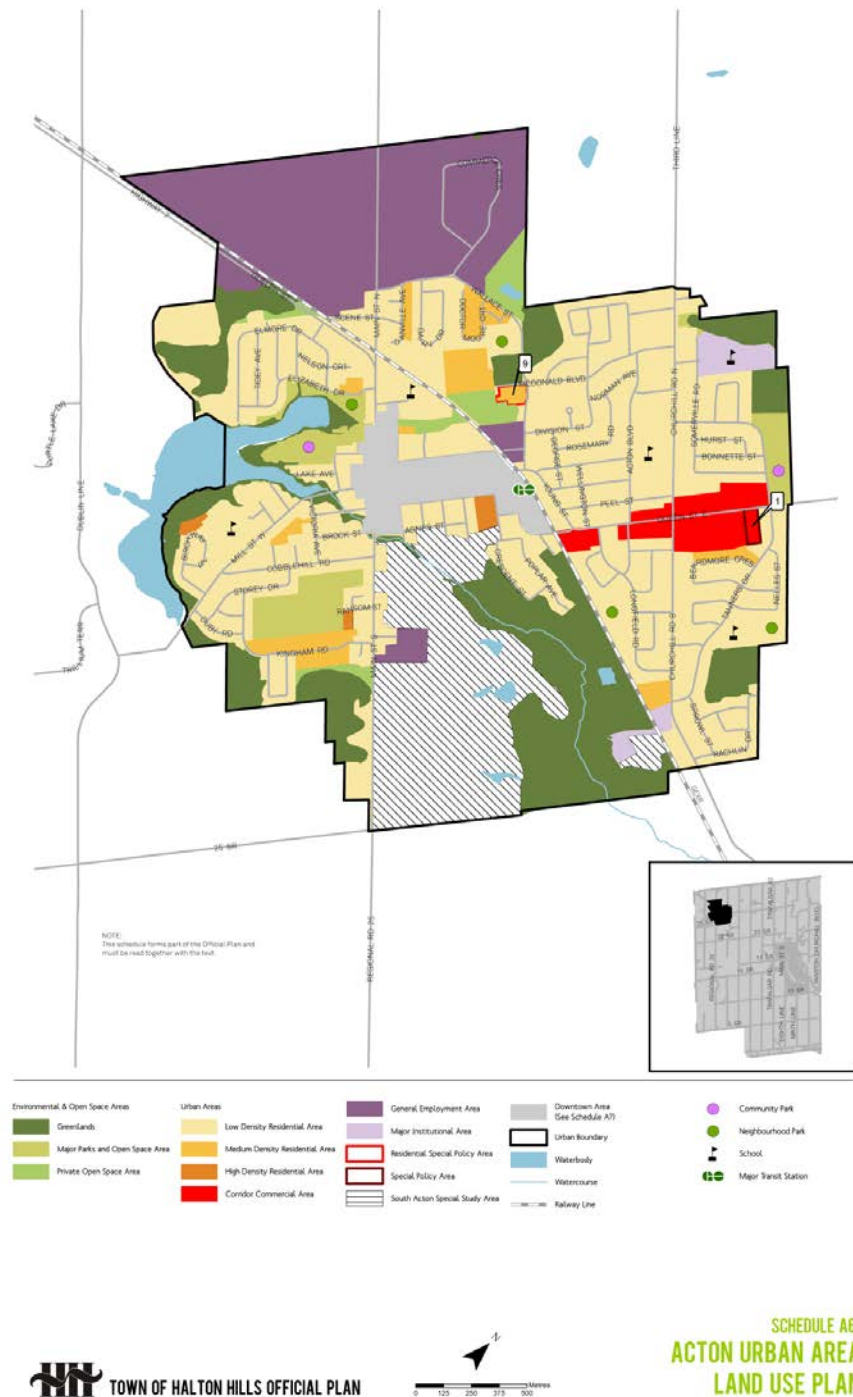




Figure 2-6
Acton Urban Area Excerpt from Town of Halton Hills O.P. Schedule A6





The permitted uses in the Prestige Employment Area are: business and professional offices in freestanding buildings; industrial uses within wholly enclosed buildings, such as manufacturing, assembling, processing, fabricating, warehousing, wholesaling and distribution facilities; computer, electronics and data processing facilities; research and development facilities excluding those that produce biomedical wastes; printing and associated service establishments; and, industrial malls, containing one or more of the uses permitted in this designation.

Secondary uses in the Prestige Employment Area are subject to restrictions and include: administrative office uses accessory to, and located on the same lot as a permitted industrial use; limited commercial uses which are ancillary to the main permitted industrial uses, such as take-out or full-service restaurants, financial institutions, convenience stores, and commercial fitness centres; commercial or trade school facilities; public parks and recreational facilities, in accordance with parkland policies; limited private parks and recreational facilities; limited retail sales of goods and materials manufactured, or substantially assembled, on the premises; post-secondary education and other institutional facilities; motor vehicle service stations; and, uses that legally existed at the date of adoption of the O.P.

The Gateway Area designation permits: full service hotels with conference and exhibition facilities; retail commercial uses not exceeding individual areas of 2,750 square metres in floor space and a total area of up to 10,000 sq.m subject to studies; banks and financial institutions and services; motor vehicle service centres, but not within 200 metres of the intersection of Steeles Avenue with Trafalgar Road and James Snow Parkway; business and professional offices in freestanding buildings; computer, electronics and data processing facilities; research and development facilities excluding those that produce biomedical wastes; printing and associated service establishments; take-out restaurants providing they are incorporated into larger developments and are ancillary to the primary use; full-service restaurants; theatres, cinemas and similar places of entertainment, but not an adult entertainment establishment; and, uses that legally existed at the date of adoption of the O.P.

Figure 2-7 shows the employment lands within the Premier Gateway Employment Area.



The O.P. has also identified Future Strategic Employment Areas as shown on Figure 2-8. These lands are to be protected from incompatible uses, strategically located in relation to major transportation facilities and existing Employment Areas, and are best suited to employment uses beyond the horizon of the O.P.

The Town adopted two Premier Gateway Employment Area Phase 1B Secondary Plans through Official Plan Amendments (O.P.A.s) 31A and 31B in June 2018 in order to create a comprehensive framework for development of the area and incorporate the findings of the Scoped Subwatershed Study. These Secondary Plans have not yet been approved by the Region of Halton. O.P.A. 31B will also add 75 ha of additional employment land into the urban area to replace the lands lost through the corridor protection of the Halton Peel Boundary Area Transportation Study/Greater Toronto Area West Corridor Study. The Secondary Plans incorporate Prestige Industrial and Business Commercial Area designations. The Business Commercial designation permits hotel uses in addition to the Prestige Industrial uses. The policies also allow existing residential uses in the Prestige Industrial Area to be zoned to recognize those existing uses as well as home occupation and office uses.

Figures 2-9 and 2-10 represent the land-use schedules for the adopted (but not yet approved) Secondary Plans created through O.P.A.s 31A and 31B.

The Town also adopted the Georgetown GO Station Secondary Plan to allow redevelopment and intensification opportunities in strategic locations. It includes an Employment Area designation, as shown on Figure 2-11, that recognizes three lots abutting the railway which are used for existing industrial uses. The designation permits the use of the lots, existing buildings and additions, for industrial, office and other non-residential uses including retail and service commercial uses. If the buildings are demolished, any new development will be subject to the railway buffering policies.

Within the rural area, the O.P. identifies Rural Cluster Areas to provide opportunities for residential and other non-farm development. The Rural Cluster Area designation that is shown on Figures 2-12 and 2-13, permits small-scale industrial operations that serve the needs of the Rural Cluster Area and/or the surrounding rural area subject to certain policies.



Figure 2-8
Future Strategic Employment Areas Excerpt from
Town of Halton Hills O.P. Schedule A17

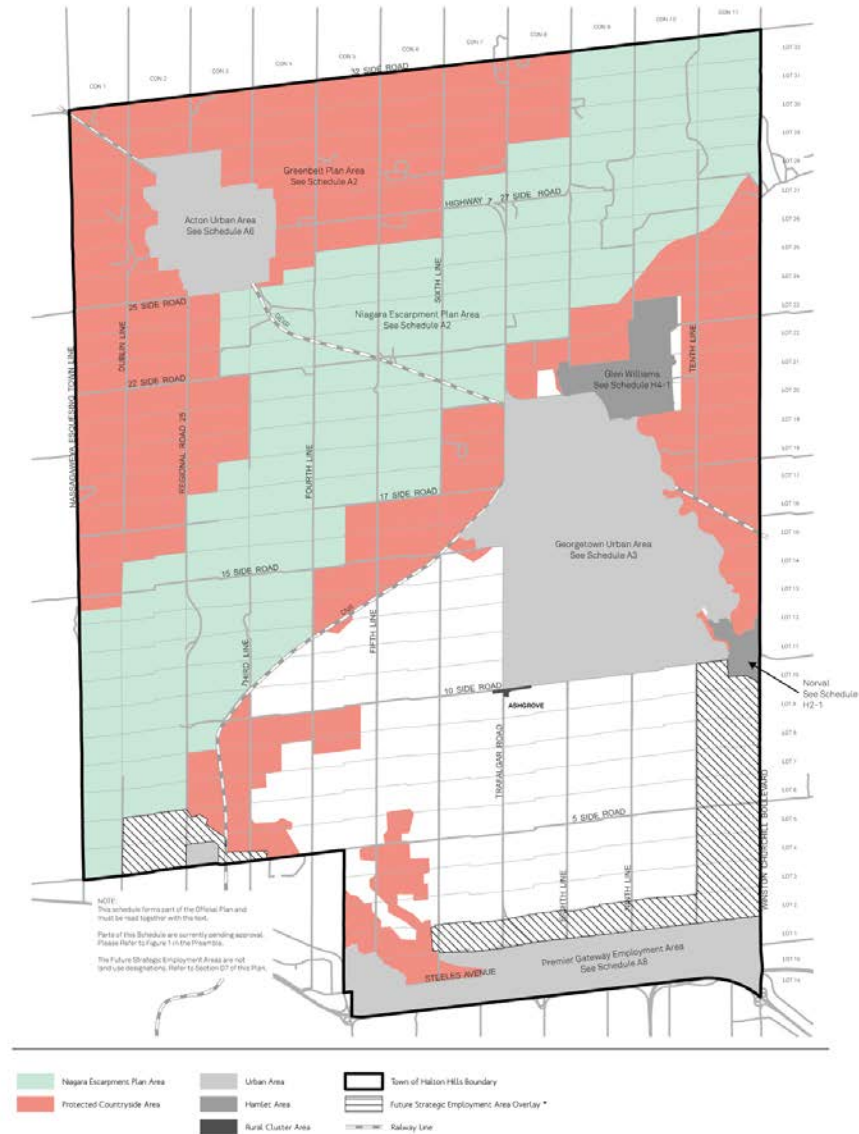




Figure 2-9
Premier Gateway Employment Area Phase 1B – Lot 1 Land Use Plan
Excerpt from Town of Halton Hills O.P.A. 31A Schedule H5A

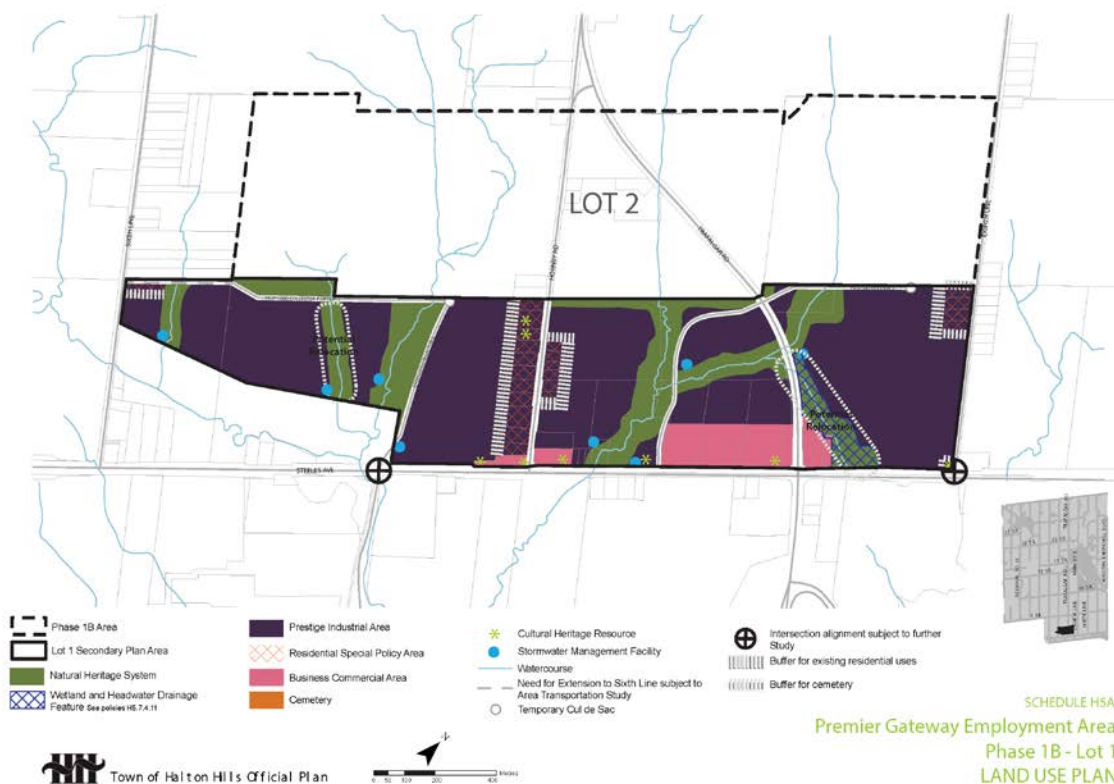




Figure 2-10
Premier Gateway Employment Area Phase 1B – Lot 2 Land Use Plan
Excerpt from Town of Halton Hills O.P.A. 31B Schedule H5B





Figure 2-11
Georgetown GO Station Area Land Use Plan Excerpt from
Town of Halton Hills O.P. Schedule H3

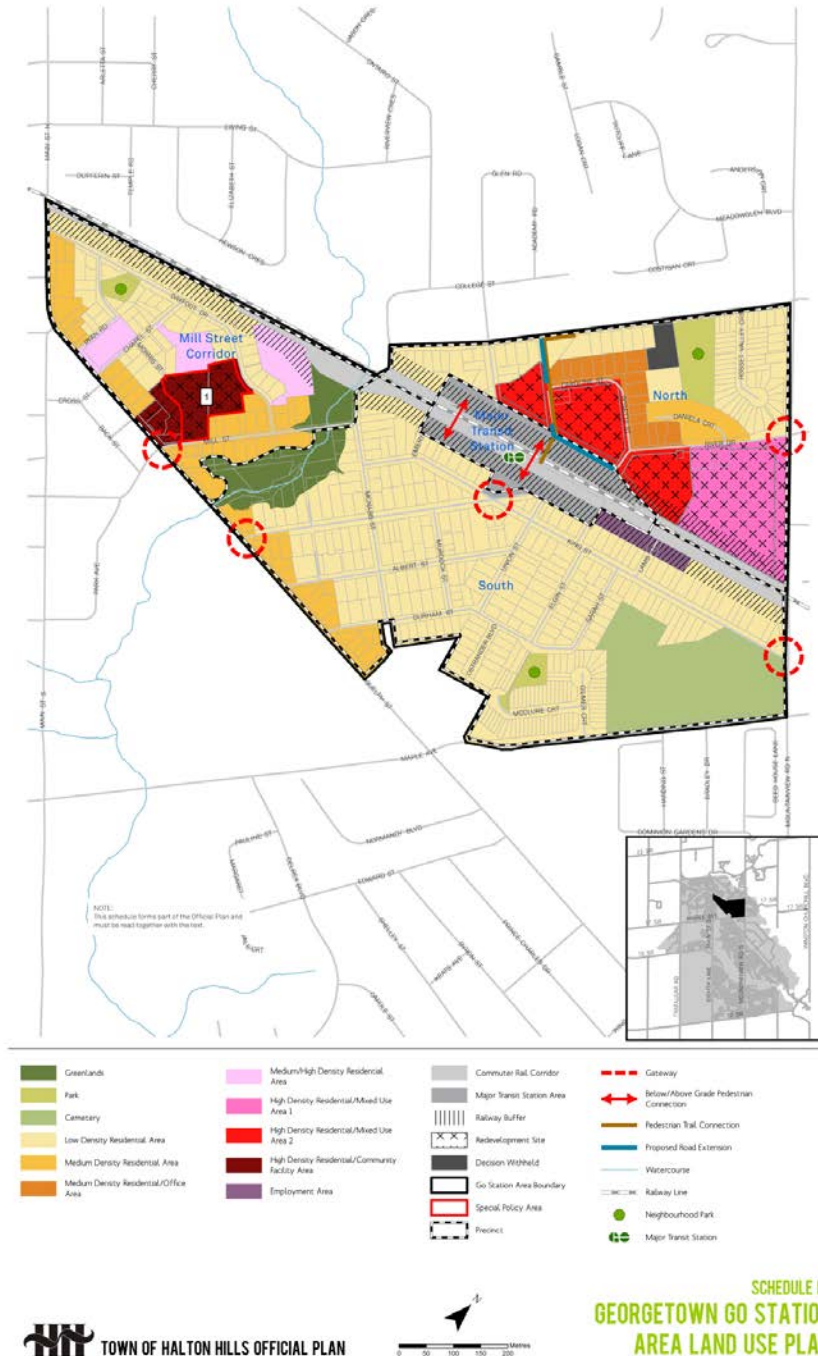




Figure 2-12
Ashgrove, Ballinafad, Bannockburn & Crewson Corners Land Use Plans
Excerpt from Town of Halton Hills O.P. Schedules A9, A10, A11 & A12

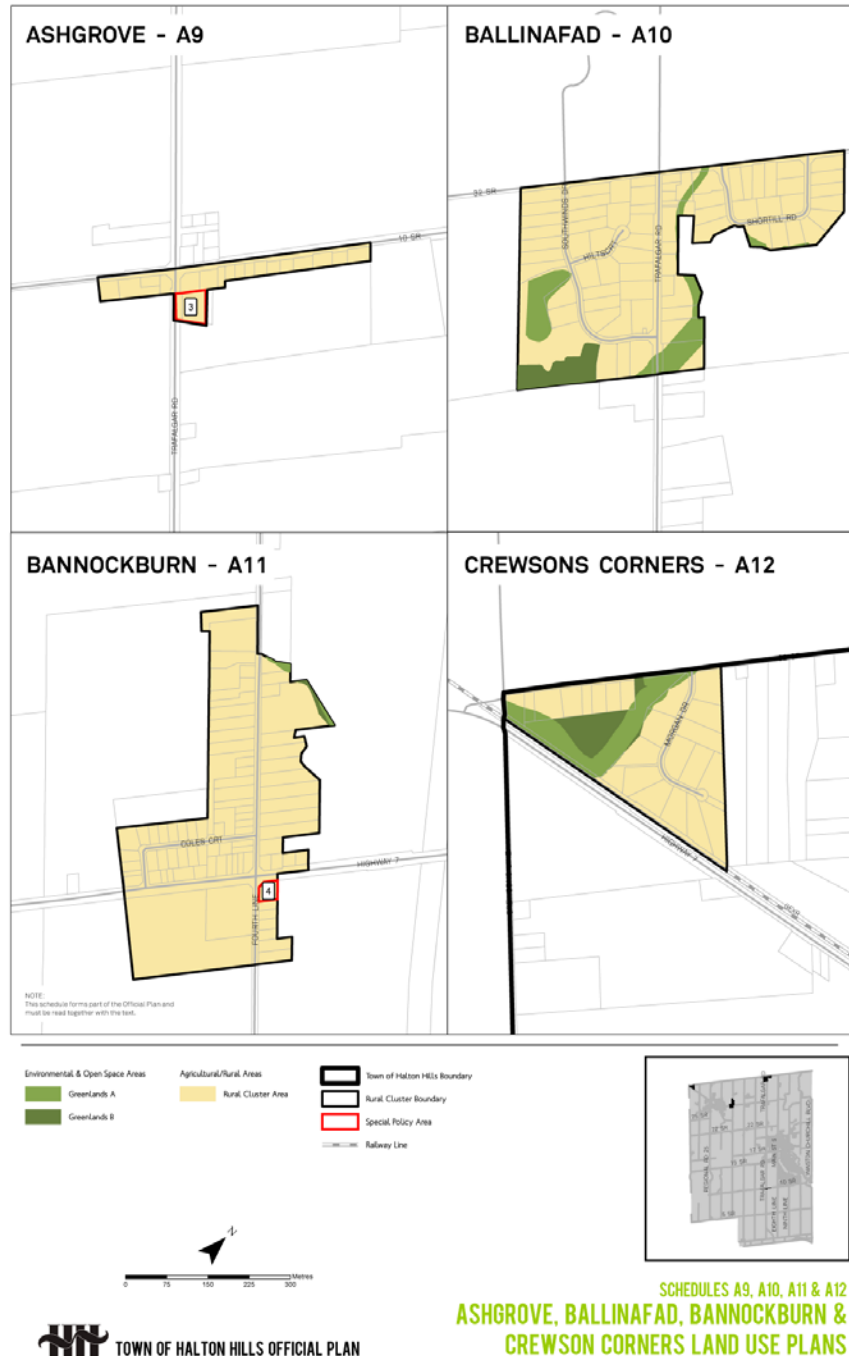
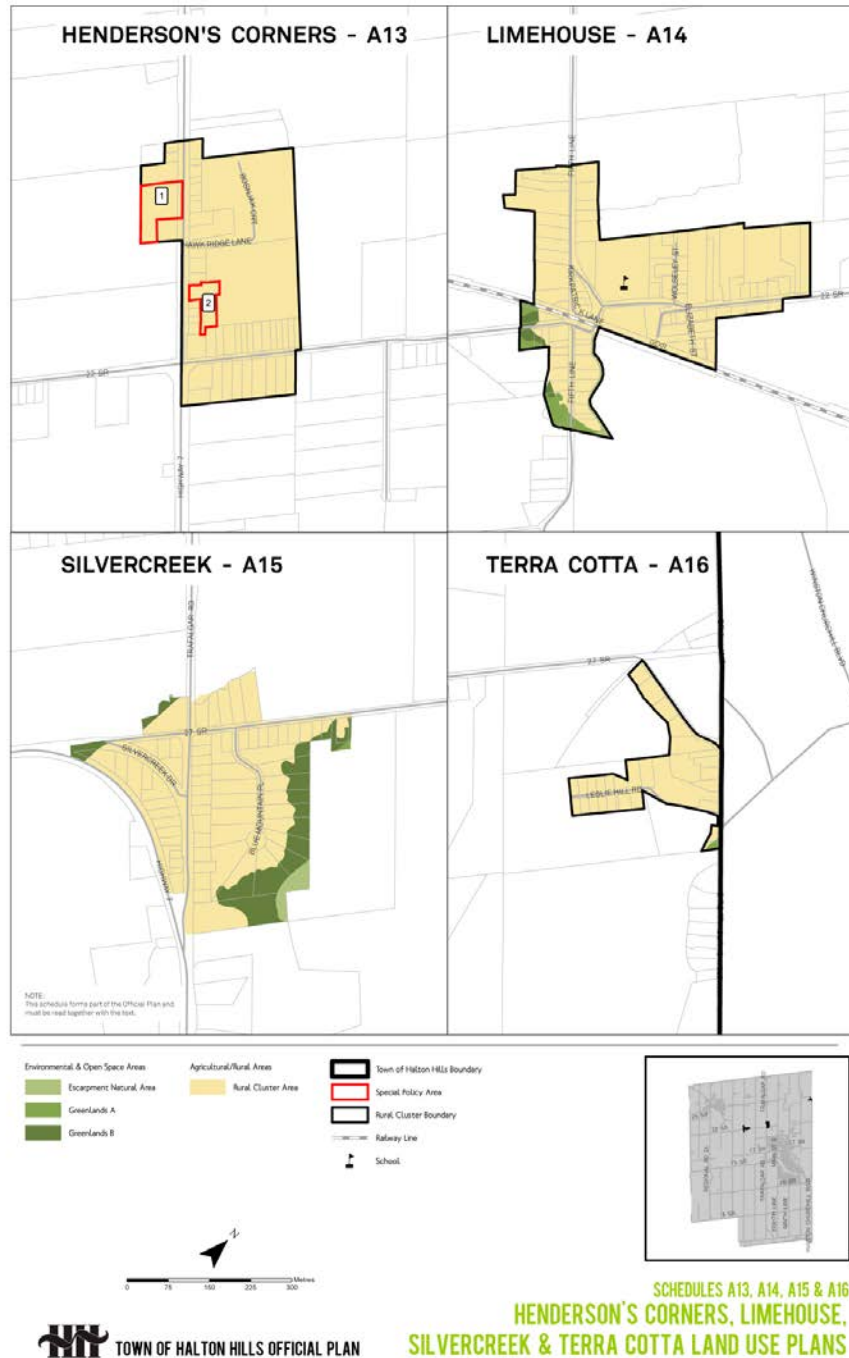




Figure 2-13
Henderson's Corners, Limehouse, Silvercreek & Terra Cotta Land Use Plans
Excerpt from Town of Halton Hills O.P. Schedules A13, A14, A15 & A16





2.4 Best Practices – Employment Land-Use Planning and Policies

A number of Employment Areas across the G.G.H. were reviewed to assist in understanding current best practices when planning for employment lands. These Employment Areas were examined based on the following themes:

- Applying eco-industrial principles;
- Planning for the knowledge-based economy; and
- Restricting retail on employment lands while allowing for employment land supportive commercial uses.

2.4.1 *Applying Eco-Industrial Principles*

Industrial development that follows eco-industrial principles is generally based on reducing the environmental impact footprint through urban design and sustainable design principles and/or embraces a triple bottom line profit business model for the development.

The Town of Halton Hills has created Green Development Standards to improve the performance, efficiency and sustainability of new development in the Town.¹ The Standards are organized into three categories, based on development type: Low-Rise Residential; Low-Rise Non-Residential; and Mid-High Rise (all forms of development). The Green Development Standards apply to all new planning applications for industrial, commercial and institutional buildings over 100 sq.m. (1,100 sq.ft.) but do not apply to renovations, expansions, and alterations. The Green Development Standards utilize an approach similar to LEED (Leadership in Energy and Environmental Design).² There are criteria in the categories of energy conservation, water conservation, air quality, waste management, transportation and community design that are available to choose from and the applicant must achieve a minimum number of points. As a result,

¹ Green Development Standards Information Guide, Town of Halton Hills website-
<https://www.haltonhills.ca/sustainability/pdf/GreenDevelopStandardsBrBooklet4print.pdf>,
accessed January 2, 2019.

² LEED is an internationally recognized green building rating system. Applicable to a wide range of building, community and home project types, LEED provides a framework to create healthy, highly efficient and cost-saving green buildings.



compliance can be tailored to the site and application-specific conditions. Allocation of water capacity is based on demonstrating compliance with applicable Official Plan sustainable development policies, which can be demonstrated through the successful completion of the Green Development Standards Checklist. To date the Town has had 100% compliance with the Standards.

Across the G.G.H. there are numerous examples where municipalities have developed eco-industrial development approaches or sustainable economic development initiatives in Employment Areas.

The Hanlon Creek Business Park in Guelph, Boxwood Business Park in Cambridge and the Clarington Technology Business Park in Clarington are examples of Employment Areas that have been planned and developed according to eco-industrial principles. Further, there are some site-specific examples of large landowners/developers incorporating eco-industrial principles in their design, including the Honda Canada Campus in Markham, Lange Transportation and Storage Ltd. in Mississauga and the Canadian Tire Distribution Centre in Bolton (Caledon). The following are some of the eco-industrial principles applied:¹

- A large allocation for open space and buffers surrounding sensitive environmental areas;
- Protecting areas with good tree canopy coverage and increasing canopy coverage in open space areas;
- Street layout design to allow for alternative energy options (e.g. solar);
- Encouraging shared driveways, parking/service lands and driveway entrances;
- Innovative stormwater management to protect surface water and ground water;
- Designing logistics and large buildings with roof-top storage;
- Use of heat-reflective white-roof to reduce cooling costs;
- Accommodating buildings with innovative HVAC systems using geothermal energy that require additional land than typically required for a conventional HVAC system for adjacent in-ground infrastructure;
- Requiring that development applications include a Sustainability Plan (Municipality of Clarington);

¹ Derived from various sources, including a report prepared by the Partners in Project Green, A Guide to Eco-Business Zone Planning & Development and various reports prepared by the City of Guelph, City of Cambridge and the Municipality of Clarington.



- Development charge incentives for LEED building design (Municipality of Clarington); and
- Environmental monitoring programs (City of Guelph).

2.4.2 Planning for the Knowledge-Based Economy

As discussed later in Chapters 3 and 6, an increasing focus towards knowledge-based sectors continues to generate the need to accommodate light industrial and office uses on employment lands. In terms of built form, knowledge-based sectors are typically accommodated in multi-tenant and standalone industrial and office buildings. To address the broad needs of the knowledge-based sector, a range of lands by type, size and location should be considered.

Increasingly, new major office/head offices accommodated in Employment Areas integrate industrial, office and training facilities on-site. Where feasible, prestige employment sites also provide significant land area to accommodate surface parking and, in some cases, future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than standalone major office developments. Given the unique operational requirements of these facilities, such uses cannot be accommodated in downtown or mixed-use office settings. In industrial/business parks, prestige office uses are often positioned at gateway locations (i.e. at major highway interchanges) with direct highway access/exposure as well as strong connectivity to arterial roads. Many of the most successful business parks across the G.G.H.¹ share the following key attributes:

- Highway access and exposure/visibility are critical for business parks, particularly for the corporate office component;
- Access to public transportation and regional transportation connections (e.g. connections to other public transportation systems and GO Transit);
- Size is less important for prestige business parks; however, these areas must be large enough to foster a sense of place, a self-contained entity and to allow for on-site amenities;

¹Specific parks reviewed included Meadowvale Business Park, City of Mississauga; Commerce Valley Business Park, City of Markham; Guelph Innovation District, City of Guelph (planned); and the Innovation Corridor (Seaton), City of Pickering (planned).



- Moderate buffering is sufficient for business parks and research and technology-oriented parks;
- Park character is typically enhanced through high-quality building design;
- Streetscapes, as well as attractive landscaping, can be developed through site controls and design guidelines; and
- Access to employment-supportive commercial uses (e.g. hotels, daycares, restaurants and other commercial services).

2.4.3 Restricting Retail on Employment Lands While Allowing for Employment-Supportive Commercial Uses

Accommodating an adequate mix of supportive uses on employment lands, such as retail and personal services, can strengthen such areas by providing amenities and services to employees/employers. Accommodating too much non-employment supportive uses, however, can lead to land use conflicts, influence land values, and eventually contribute to the erosion of employment lands.

While non-industrial uses can directly support the function of Employment Areas, large freestanding retail uses can potentially create negative impacts on the surrounding industrial or employment uses, or impact the future prospects of the area for industrial development. Though large freestanding retail uses generate employment, they may also absorb large shares of land through their configuration or requirements (e.g. parking), draw considerable traffic from outside the immediate area (creating congestion in the industrial area), or affect the character of the Employment Area. As such, approaches should be developed to discourage “major retail” development in Employment Areas.

Under the 2017 Growth Plan, employment land protection policies have been strengthened with respect to prohibiting uses such as major retail in Employment Areas. As a result, the 2017 Growth Plan provides that, for any major retail uses that are permitted in Employment Areas, a municipality should establish a size or scale threshold for such use. The definition of major retail and restrictions for retail on employment lands varies across the G.G.H. Maximum retail development sizes on employment lands, ranges from 2,500 sq.m (26,900 sq.ft.) to 10,000 sq.m (107,600 sq.ft.). The City of Kitchener defines major retail in the City’s O.P. as having a collective minimum retail gross floor area of 5,000 sq.m (53,800 sq.ft.) or greater and any freestanding building or industrial retail outlet in a multi-unit building within the



development exceeding 2,500 sq.m (26,900 sq.ft.) in gross floor area. The Region of Durham restricts major retail on employment lands and defines major retail as retail or commercial facilities exceeding 2,000 sq.m (21,500 sq.ft.) or greater in the Region's O.P. In comparison, the City of Vaughan allows for a greater allowance of retail development on employment lands, permitting retail development of up to a maximum size of 10,000 sq.m (107,600 sq.ft.) on employment lands.

The Halton Region O.P. does not include a maximum threshold for retail on employment lands. It is noted, however, that the Region will coordinate with the local municipality for the planning and approval process of large-scale major retail uses whose primary trade area extends beyond the boundary of the local municipality.¹ There is a maximum retail threshold policy in the Town of Halton Hills's O.P. for the area in the Premier Gateway Employment Area, the Gateway Area. According to the O.P.:

“retail commercial uses not exceeding individual areas of 2,750 square metres in floor space and a total area of up to 10,000 square metres within the Gateway Area.”²

While a maximum threshold is established in the Town's O.P., it is noted that:

“Council may pass by-laws to permit individual retail commercial uses of individual stores over 2,750 square metres and over 10,000 square metres in total retail space within the Gateway Area designation providing the use meets the objectives of this Plan.”³

¹ Halton Region Official Plan, Official Plan for the Halton Planning Area Regional Municipality of Halton, Office Consolidation June 19, 2018, p.30.

² Town of Halton Hills Official Plan, Urban Land Use Policies, D-66.

³ Town of Halton Hills Official Plan, Urban Land Use Policies, D-66.



Chapter 3

Macro-Economic Trends



3. Macro-Economic Trends

In examining Halton Hills's employment lands, it is essential to understand the broader influences and factors that affect the regional economy as a whole. This section examines recent macro-economic trends influencing labour force and employment trends at the provincial, G.T.H.A. and Halton Region levels.

3.1 International Trade

In its latest World Economic Outlook, the International Monetary Fund (IMF) is forecasting global economic growth to carry forward momentum of 3.2% in 2016 and 3.7% in 2017 to further strengthen global growth, with 3.9% projected for 2018 and 2019. For advanced economies, the IMF estimates 2.3% growth realized in 2017, and has increased the outlook based on expected favourable conditionals supporting stronger business investment. Growth prospects for emerging markets and developing economies have also strengthened, with growth expected to slightly increase over the next two years.¹

Within the United States (U.S.) real G.D.P. (gross domestic product) advanced by a solid 2.3% in 2017, up from a three-year low of 1.6% in 2016, attributed to strong household consumption, businesses investment and exports. For 2018 and 2019, U.S. growth is projected to improve to 2.6% and 2.3%. The new U.S. administration's tax reform and associated fiscal stimulus coupled with a positive global economic outlook are key contributors to the short-term boost, in conjunction with Congress's \$1.3 trillion spending plan which should support strong domestic demand. Over the next five years, U.S. economic growth rates, as measured through G.D.P., are forecast to decline from 2.6% to 1.9% as the stimulus fades and interest rates are expected to rise.²

¹ Economic and Budget Outlook. Financial Accountability Office of Ontario. Assessing Ontario's Medium-Term Budget Plan. Spring 2018.

² Ibid.



3.2 Provincial and National Economic Outlook

3.2.1 *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 G.D.P. (gross domestic product) output, has shifted from the goods-producing sector (i.e. manufacturing and primary resources) to the services-producing sector. Much of this shift has occurred during the past two decades, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. In contrast, service-based sectors such as financial and business services have seen significant increases over the past several years.

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, industrial processes have become more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

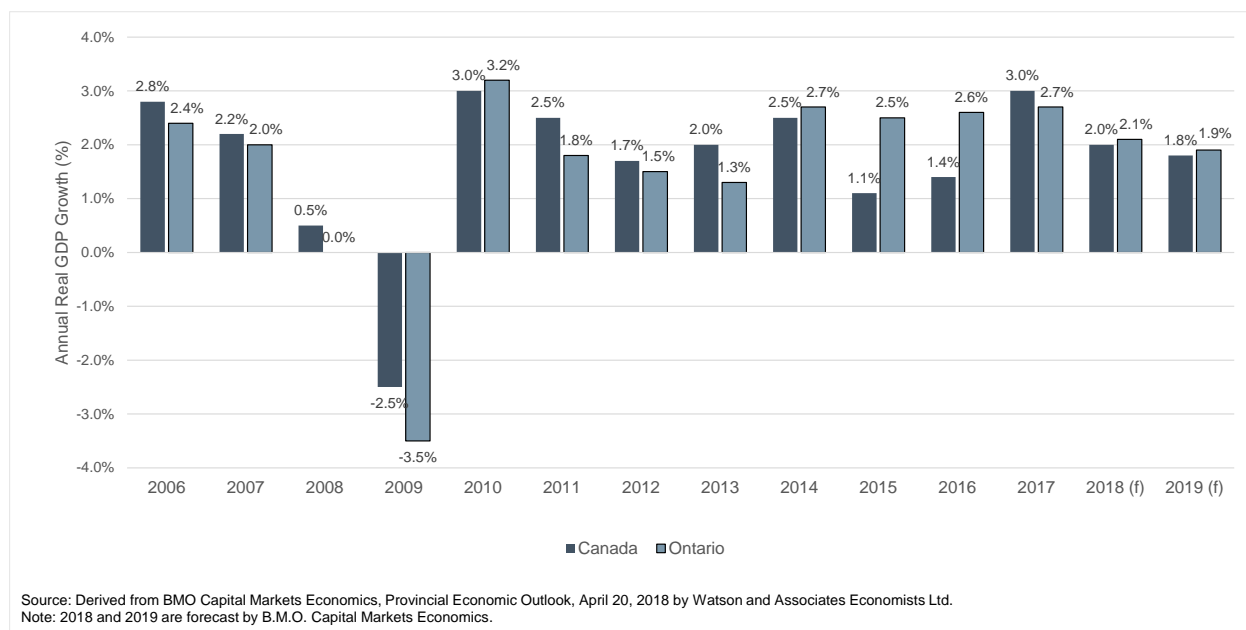
Over the past decade, the Ontario economy has experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery has been relatively slow to materialize. That said, provincial G.D.P. levels have sharply rebounded since 2014 and are forecast to remain above the national average in 2018/2019, as illustrated in Figure 3-1. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector which has been fueled by a lower-valued Canadian dollar and the gradual strengthening the U.S. economy.¹ Looking forward, provincial G.D.P. growth is anticipated to ease from just over 2% in 2018 to approximately 1.3% by 2020, largely as a result of a tightening labour market and slowing global economic growth².

¹ Valued at approximately \$0.73 U.S. as of January, 2019.

² Royal Bank of Canada. Provincial Outlook. December 2018.



Figure 3-1
Annual Real G.D.P. Growth, Ontario and Canada
Historical (2008 to 2016), Ontario Estimate (2017) and Forecast (2018 to 2019)



While the performance of the Ontario economy is anticipated to remain positive over the near term, there are potential risks to the national and provincial economies that are important to recognize. This includes risks with respect to the adoption of protectionist trade measures in the U.S., as well as other proposed changes to U.S. fiscal and industrial policies. Domestically, the housing market continues to pose a risk to the overall economy. The sharp rise in Ontario's housing prices – particularly in the Greater Toronto Area (G.T.A.) – has contributed to record consumer debt loads and eroded housing affordability. Ontario household debt reached record levels in 2016 at 171% of disposable income, and the share of income required to service debt payments is expected to increase as the Bank of Canada hiked the benchmark interest rate three times from July 2017 to January 2018 to reach 1.25%. The resultant increased debt payments may force consumers to scale back on other spending and potentially result in negative implications for the economy.¹

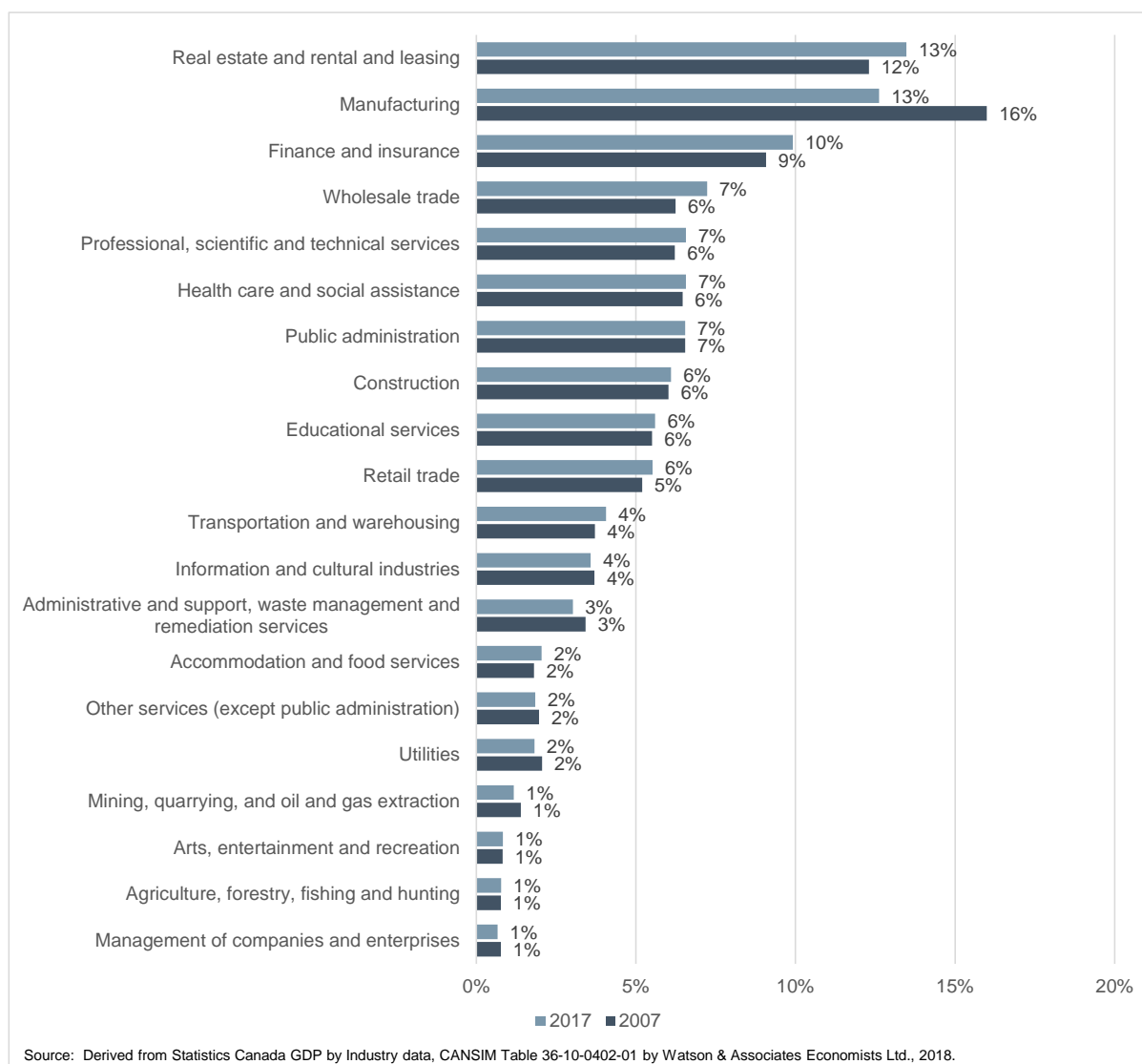
The trend towards more knowledge-intensive and creative forms of economic activity is evident across many sectors within both the broader national and provincial economies

¹ Economic and Budget Outlook. Financial Accountability Office of Ontario (F.A.O.). Assessing Ontario's Medium-Term Budget Plan. Spring 2018.



and within the Greater Toronto and Hamilton Area (G.T.H.A.) economy. This trend includes growth in financial services, information technology, business services, health care and social services, government, advanced manufacturing, energy, information and cultural industries, education, training and research, agri-business and tourism. In planning for long-term growth, these sectors are anticipated to be amongst the key growth areas of the G.T.H.A. knowledge-based economy.

Figure 3-2
Province of Ontario G.D.P. by Sector, 2007 and 2017



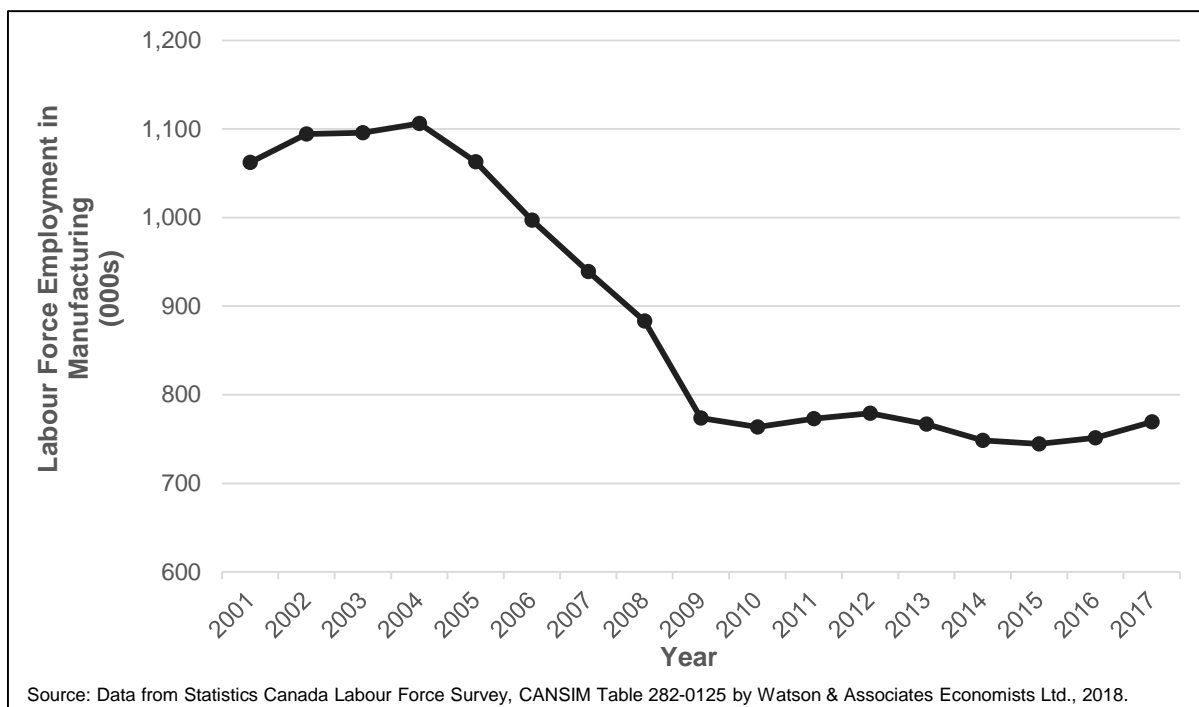


3.2.2 Outlook for Provincial and Regional Manufacturing Sectors

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, industrial processes have become more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

As summarized in Figure 3-3, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009. Between 2009 and 2017, provincial labour force levels have stabilized in the manufacturing sector. Looking forward, modest labour force growth is anticipated in this sector across the Province of Ontario, as well as more regionally across the G.T.H.A.

Figure 3-3
Manufacturing Labour Force Employment in Ontario, 2000 to 2017





3.3 Economic and Non-Residential Trends within the G.T.H.A.

3.3.1 *Shifting Structure and Influence of Ontario's Economic Powerhouse*

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

With a robust economy and diverse mix of export-based employment sectors, the G.T.H.A. is highly attractive on an international level to new businesses and investors. The G.T.H.A. 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 the City of Toronto and the G.T.H.A. "905" municipalities, largely driven by international and inter-provincial net migration to this region.

The diverse and highly competitive G.T.H.A. economy has fuelled a steady level of employment growth over the past decade in almost all major sectors of the service-sector economy since 2006. Many of these sectors, including professional, scientific and technical services, financial services, information and cultural industries, education services, health care and social services as well as real estate, represent the knowledge-based and creative-class economy.¹ Within the service sector, economic growth has been particularly strong for small- to medium-scale knowledge-based businesses that are focused on innovation and entrepreneurship.

The G.T.H.A. has also experienced significant employment growth in the Goods Movement sector over the past decade comprised of transportation/warehousing and wholesale trade. This sector is highly concentrated within the Regions of Peel, York and Halton, which are located within proximity to the T.P.I.A. Other regional infrastructure attributes, including access to 400-series highways as well as existing and planned intermodal facilities in Brampton, Vaughan and Milton, have and will continue to

¹ Richard Florida, *The Rise of the Creative Class*. 2002



play a key role in driving demand within this sector across the G.T.H.A. Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas.

3.3.2 Trends in Industrial/Office Development Activity

The G.T.H.A.'s industrial and office commercial development markets are significant, having the third and sixth largest inventories, respectively, in North America.¹ The following provides commentary on the characteristics of the market and recent development trends by geographic area.

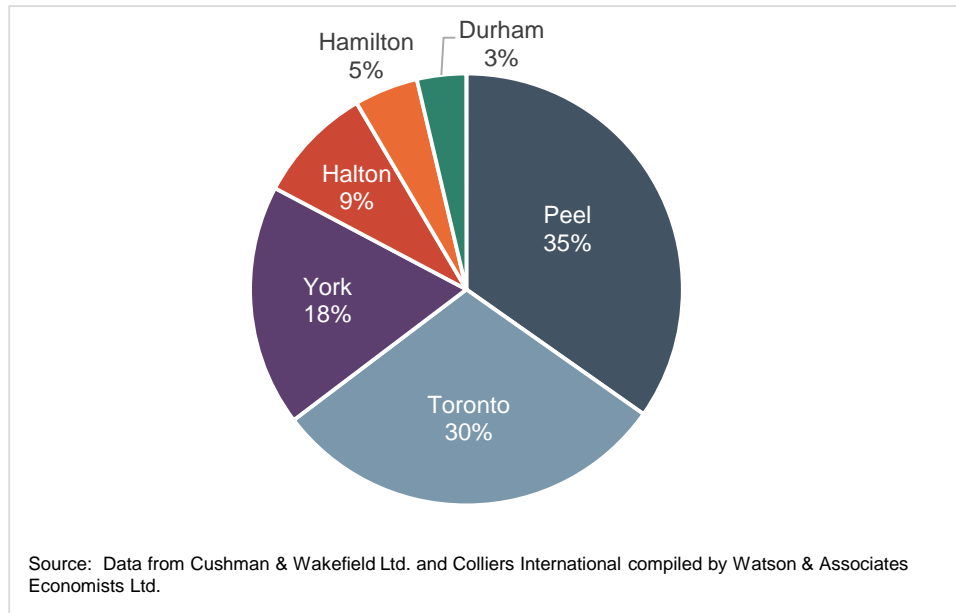
Industrial Market

The industrial market in the G.T.H.A. is comprised of 75 million sq.m (812 million sq.ft.) of industrial space, as expressed in gross floor area (G.F.A.), with nearly two-thirds located in Peel Region and the City of Toronto, as illustrated in Figure 3-4. Comparatively, Halton Region has an existing industrial base of 7 sq.m of G.F.A. (71 million sq.ft.), which comprises 9% of the G.T.H.A.'s total market.

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 3-4
Share of G.T.H.A. Industrial G.F.A. Inventory
by Upper/Single Tier Municipality

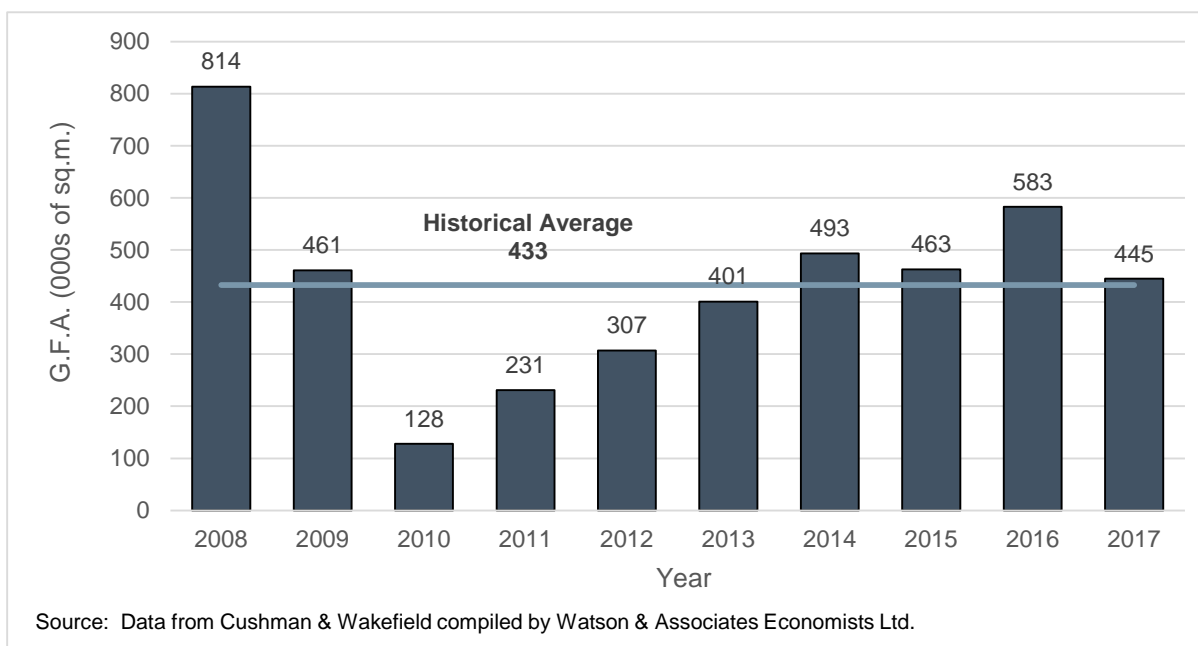


With respect to industrial building development, the G.T.H.A. has averaged 440,000 sq.m (4.7 million sq.ft.) of G.F.A. annually over the 2008 to 2017 period (refer to Figure 3-5). The G.T.H.A. experienced significant growth in industrial development in 2008; however, with the onset of the 2008/2009 global economic recession, development activity dropped sharply in 2009 and 2010. Since bottoming out in 2010, industrial development activity has been steadily rebounding, with 2017 activity totalling 450,000 sq.m (4.8 million sq.ft.). Recent industrial development activity, however, remains below pre-recession levels.

Over the past five years, industrial development has been largely oriented to large-scale industrial buildings housing wholesale trade, transportation/warehousing and multi-tenant industrial condominiums, accommodating a range of industrial and non-industrial uses.



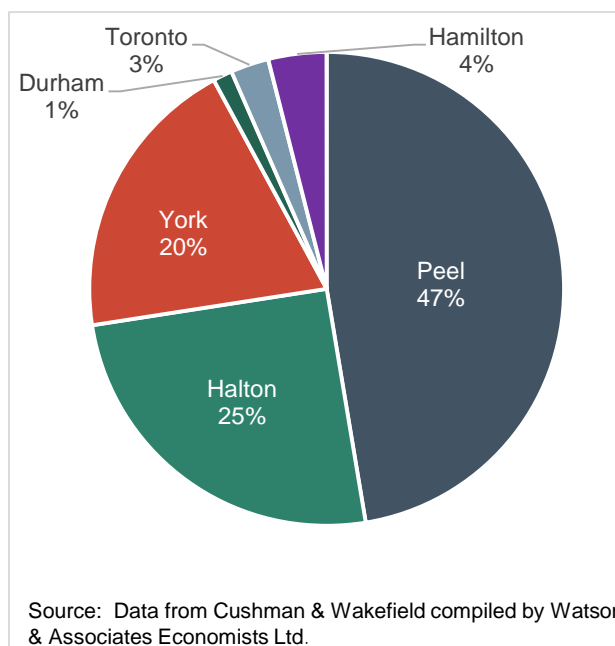
Figure 3-5
Industrial Development within the G.T.H.A. (000s G.F.A.), 2008 to 2017



Over the 2011 to 2017 period, Peel Region accommodated nearly half (47%) the G.T.H.A.'s industrial development, as illustrated in Figure 3-6. In comparison, Halton Region accounted for 25%, York Region 20%, City of Toronto 3%, Durham Region 1% and the City of Hamilton 4%. The majority of recent industrial development in the G.T.H.A. has been focused largely along the Highway 401 corridor in Mississauga, Brampton, Halton Hills and Milton, and in the Highway 400/407 area of Vaughan.



Figure 3-6
G.T.H.A. Industrial Development by Geographic Area,
2011 to 2017



Coinciding with the increase in industrial development activity since 2010, vacancy rates have gradually declined to relatively low levels and net market rents have risen, albeit at a marginal rate. The industrial vacancy rate in the G.T.A. and Halton Region is currently 2.2% and 5.8%, respectively.¹ This is indicative of a relatively balanced market with respect to demand vs. supply.

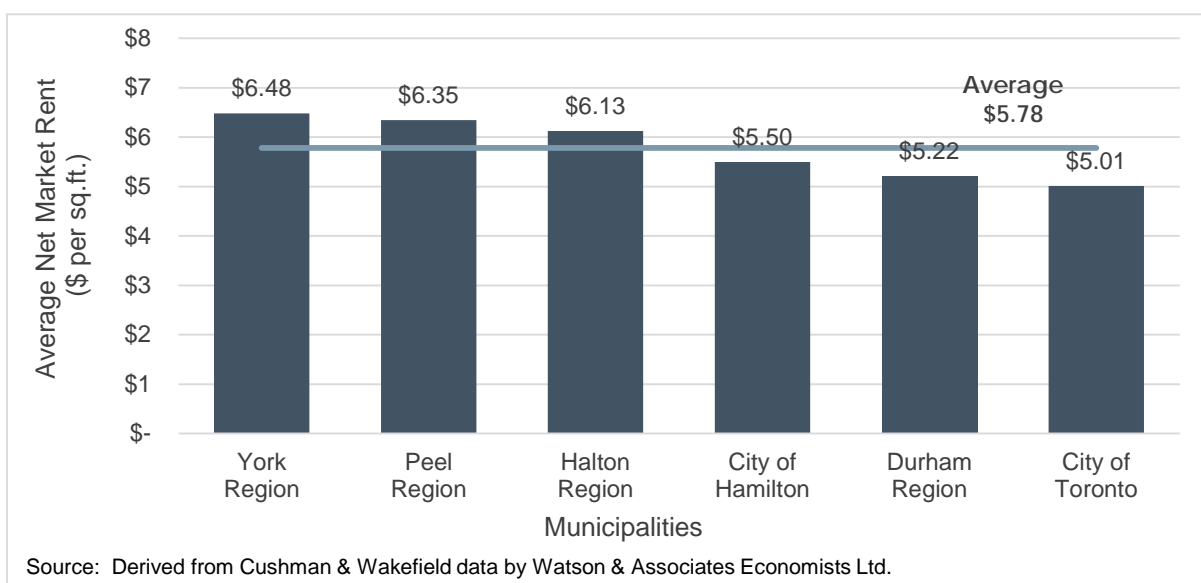
A key variable in understanding the relative strength of the industrial and office markets is the net market rents for industrial and office space, typically expressed on a per sq.ft. of gross lease area on an annual lease basis and referred to as “net market rent.”² Figure 3-7 summarizes the average market rents for industrial space in the G.T.H.A. by upper/single-tier municipality. Industrial net market rents in Halton Region average \$6.13 per sq.ft., marginally higher than the G.T.H.A. average. Industrial market rents are highest in York Region, followed by Peel Region and Halton Region.

¹ Cushman & Wakefield Greater Toronto Area Industrial Market Beat Q1 2018.

² Net market rent is exclusive of additional charges to the property (e.g. taxes, insurance, utilities and maintenance).



Figure 3-7
G.T.H.A. Average Industrial Net Market Rents (per sq.ft.)



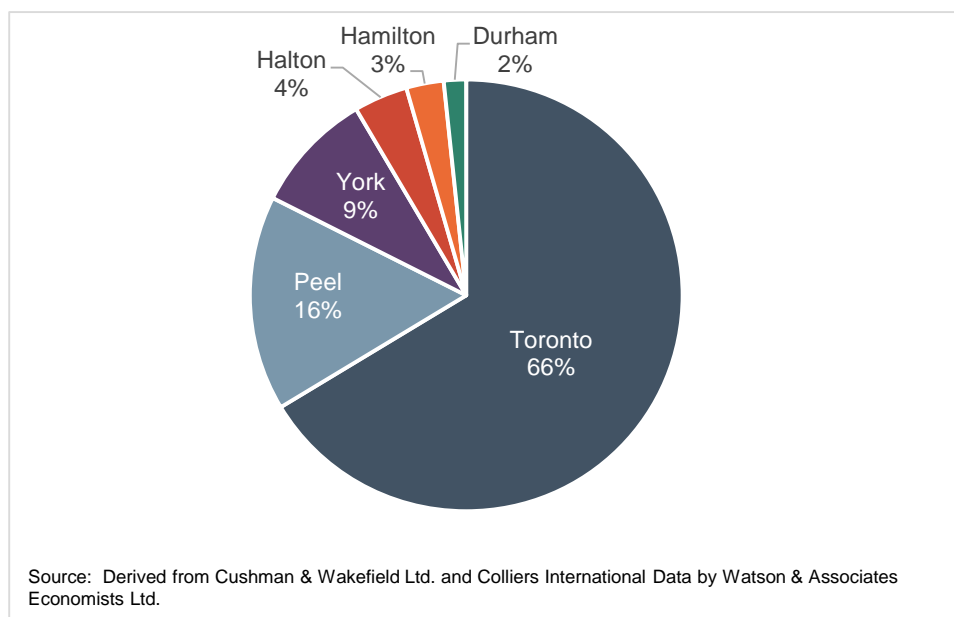
Office Market

With respect to the office market, the G.T.H.A. contains 17 million sq.m (183 million sq.ft.) of office space.¹ Of this total, nearly two-thirds (66%) is located within the City of Toronto, with the majority located in the downtown core, as illustrated in Figure 3-8. Outside the City of Toronto, major office clusters are located in the 905 area, including York Region (Highways 404 and 407 in Markham and Richmond Hill, and the Highway 400 Corridor in Vaughan), Peel Region (Mississauga Airport Corporate Centre, City Centre and Meadowvale), and Halton Region (Q.E.W. Corridor in Burlington and Oakville). Halton Region's share of the G.T.H.A. major office market is relatively small, representing 4% of total building G.F.A.

¹ Source: Derived from Cushman & Wakefield 2013 to 2017 data, except data for the City of Hamilton which was derived from Colliers International Oakville-Burlington-Hamilton Commercial Real Estate Update Q4 2017.



Figure 3-8
Share of G.T.H.A. Major Office G.F.A. Inventory
by Upper/Single-Tier Municipality

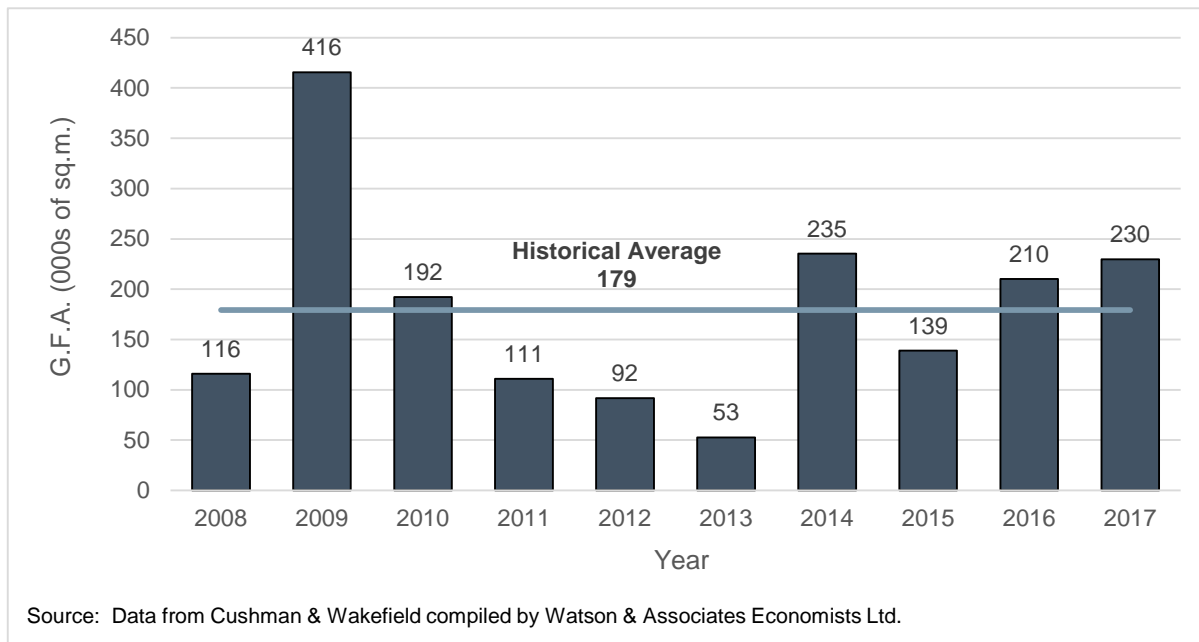


Over the 2008 to 2017 period, major office development activity in the G.T.H.A. has averaged 179,000 sq.m (1.9 million sq.ft.) per year¹ (refer to Figure 3-9). Major office development has exhibited relatively strong growth throughout the past decade. In 2017, office development activity totalled 230,000 sq.m (2.5 million sq.ft.), moderately higher than the historical 10-year annual average.

¹ Based on building completions market data from Cushman & Wakefield. Excludes City of Hamilton for which data was unavailable.



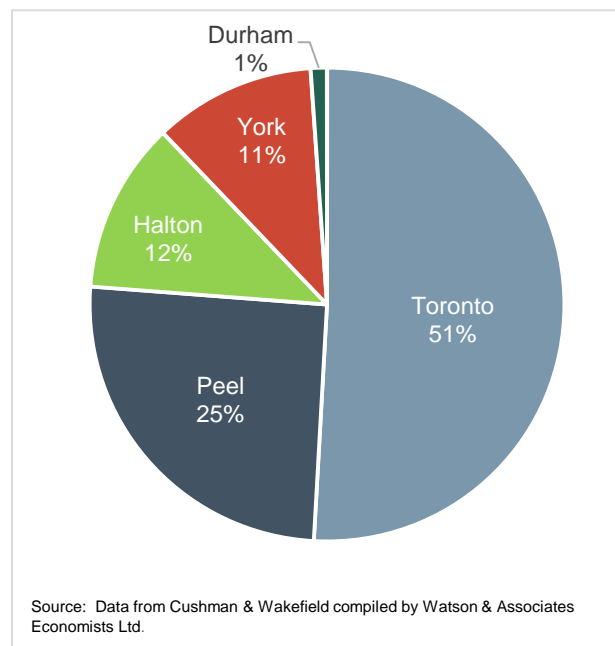
Figure 3-9
Major Office Development within the G.T.A. (G.F.A.), 2008 to 2017



Over the 2011 to 2017 period, over half of new major office development was accommodated within the City of Toronto, as illustrated in Figure 3-10. This is compared to 25% within Peel Region, 12% within Halton Region, 11% in York Region and 1% in Durham Region.



Figure 3-10
Greater Toronto Area Major Office Development, 2011 to 2017



Major office development over the past decade has been concentrated within the Toronto downtown core as well as in Vaughan, Markham, Mississauga along the Highway 401 corridor, and the Q.E.W. corridor in Oakville. Over this period, office development activity in the G.T.H.A. has shifted increasingly to downtown Toronto at the expense of suburban locations.

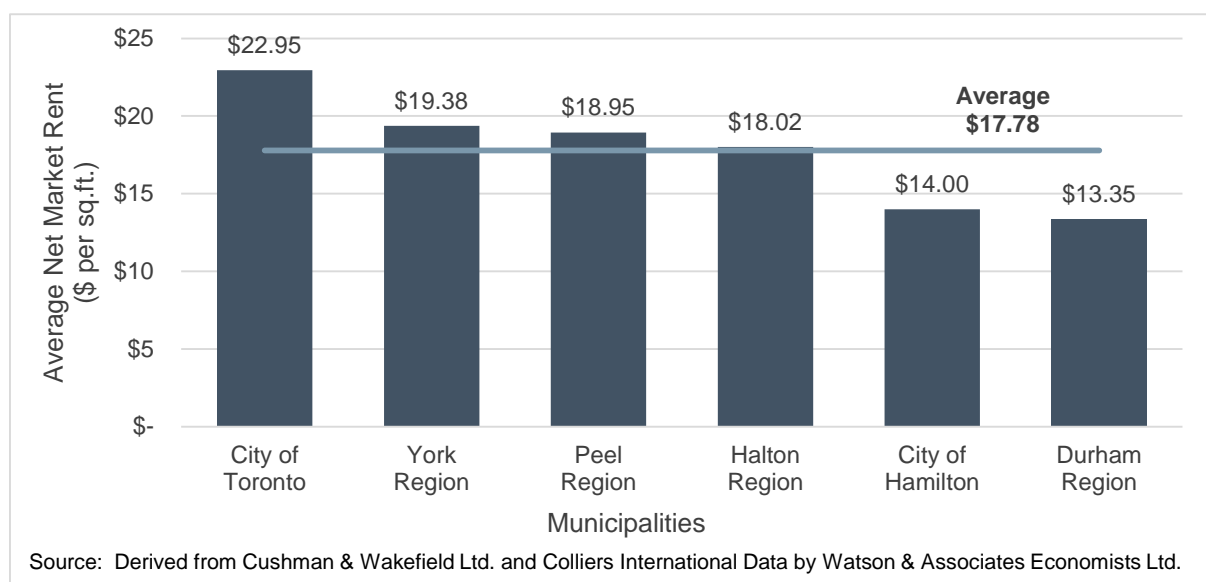
Historically, the vast majority of suburban office development has been accommodated within Employment Areas; however, market prospects for conventional standalone suburban office development within Employment Areas is gradually diminishing, as demand shifts to more urban environments. Demand for office space within Employment Areas is increasingly single-tenant and integrated with multi-purpose facilities (e.g. R&D, training centres, wholesale trade) often in campus-type settings. Further, there are growing opportunities for office development within innovation districts located on employment lands which have direct synergies with knowledge-based clusters, as well as health and educational infrastructure.



The office availability rate in the G.T.A. averages 6.7%.¹ Vacancy rates for major office space have decreased significantly since the 2008/2009 economic downturn. While vacancy rates for major office space has declined, this has largely been attributed to downtown Toronto where availability rates are relatively low (2.4%), while rates in suburban locations, including the 905 area, remain relatively high, averaging 11.1%.²

Figure 3-11 summarizes the average market rents for major office space in the G.T.H.A. by upper/single-tier municipality. As illustrated, office net market rents in Halton Region are marginally above those in the G.T.H.A, averaging \$18 per sq.ft., with only the City of Hamilton and Durham Region having lower rents. This is compared to the City of Toronto, and York and Peel Regions, where rents range between \$19 and \$23 per sq.ft.

Figure 3-11
G.T.A. Average Office Net Market Rents (per sq.ft.)



3.3.3 G.T.H.A. Population and Employment Growth Outlook

Over the next two decades, considerable new residential and non-residential growth is anticipated across the G.T.H.A. In accordance with the Provincial Growth Plan,³ the population of the G.T.H.A. is forecast to increase from 7.18 million in 2016 to 10.13

¹ Cushman & Wakefield Greater Toronto Area Office Market Beat Q1 2018.

² Ibid.

³ Growth Plan for the Greater Golden Horseshoe, May 2017. Ontario Ministry of Municipal Affairs.



million in 2041, an increase of close to 3 million persons. The area is also forecast to add approximately 1.3 million jobs over the same time period. This represents a substantial increase in population and employment relative to other North American metropolitan regions of comparable population. The strong growth potential anticipated for the G.T.H.A. is largely tied to the strength and diversity of the area's industry clusters.

Overall, there is a diminishing employment land supply relative to demand in the large G.T.H.A. markets, including the City of Vaughan, City of Mississauga and the City of Brampton. As the more mature areas of the G.T.H.A. gradually build out, increasing outward growth pressure will be placed on the remaining vacant greenfield Employment Areas of the G.T.H.A. This is particularly important for North Halton Region (i.e. Halton Hills and Milton), which is anticipated to accommodate significant new employment lands development on greenfield lands over the coming decades, combined with modest non-residential intensification.

3.4 Halton Region's Evolving Economy

3.4.1 Economic Trends and a Shifting Export-Based Economy

In many respects Halton's economic growth potential is largely tied to the success of the G.T.H.A. as a whole. Many of the largest and fastest growing employment sectors across the G.T.H.A. have also experienced strong growth and expansion over the past several decades in Halton Region, as outlined in Figures 3-12 and 3-13. Similar to the G.T.H.A. as whole, the Region has also experienced strong employment growth in a number of knowledge-based and goods-producing sectors from 2011 to 2016, including manufacturing, which drive the export-based economy in the Region. Strong population growth across Halton Region has also fueled steady growth in population-related employment sectors including retail, and accommodation and food services. Also, a steady rebound in non-residential development activity has supported strong employment growth in the construction sector.



Figure 3-12
Halton Region Change in Employment, 2006 to 2011

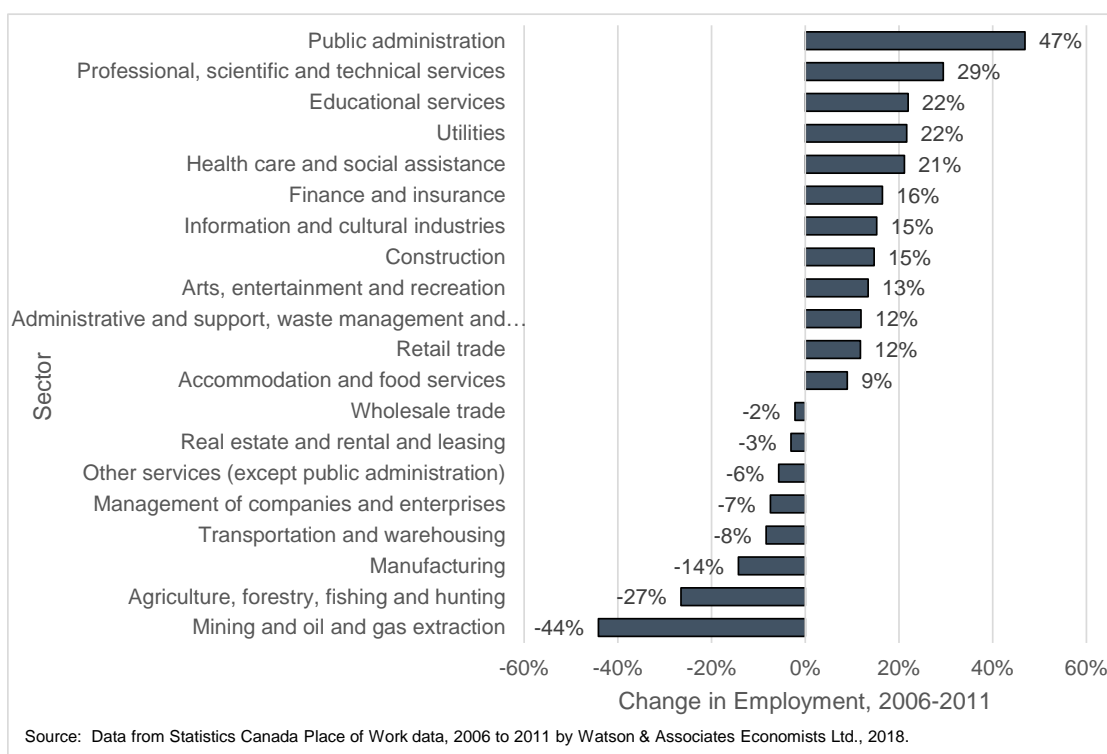
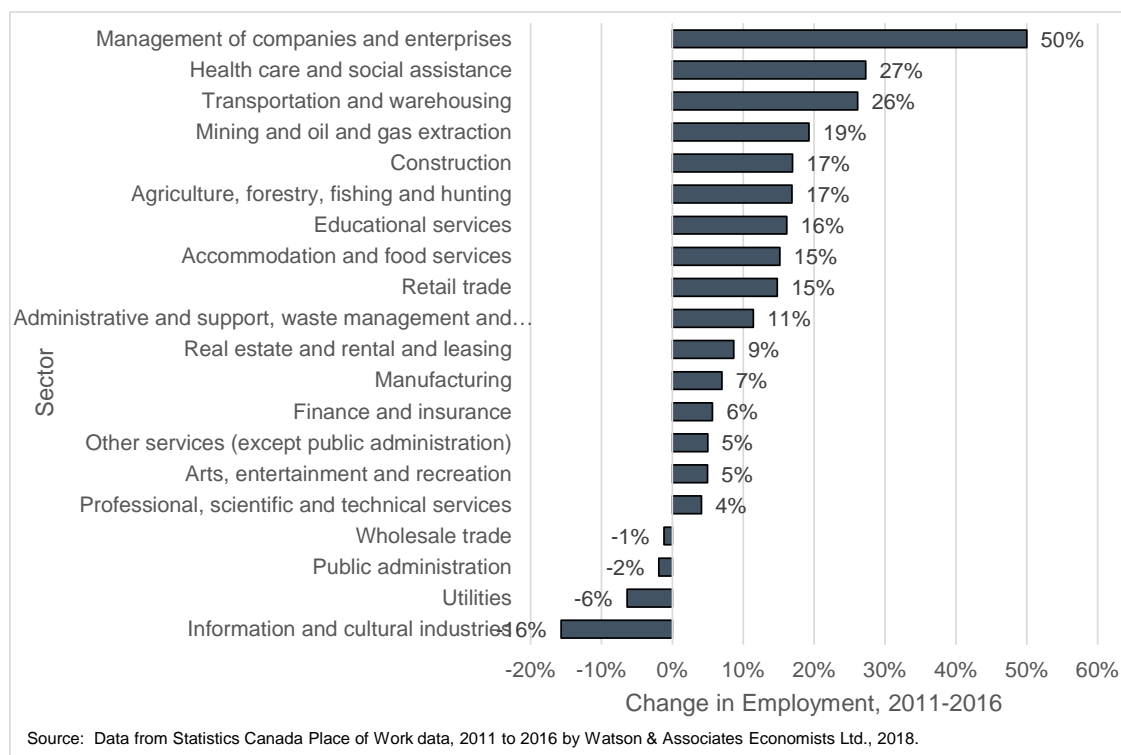




Figure 3-13
Halton Region Change in Employment, 2011 to 2016



3.4.2 Employment Absorption Trends on Employment Lands in Halton Region, 2008 to 2017

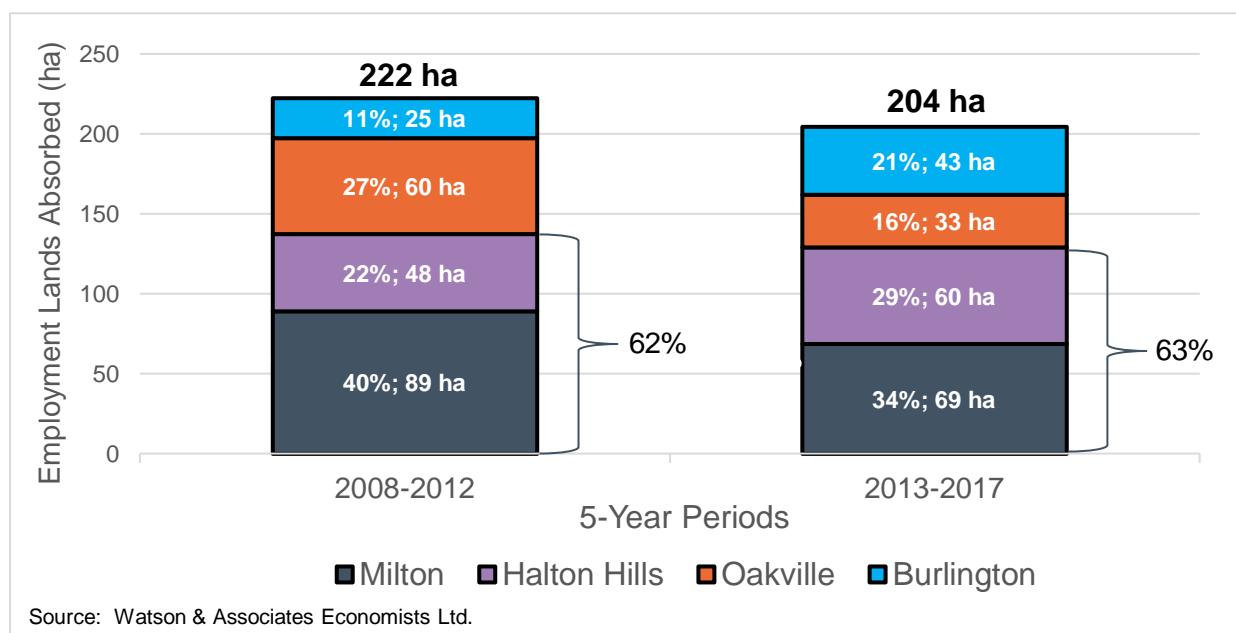
Employment land absorption levels¹ in Halton Region have averaged approximately 43 net ha (106 net acres) per year over the past decade. Approximately 62% of employment land absorption in Halton Region has occurred in the Region's northern municipalities, the Town of Milton and the Town of Halton Hills. Absorption within the Towns of Milton and Halton Hills has been primarily concentrated in Employment Areas with access to Highway 401 and has accommodated large-scale logistics operations. As summarized in Figure 3-14, Halton Region's absorption levels have decreased slightly from an average of 44 ha (109 acres) over the 2008 to 2012 period, to 42 ha (108 acres) per year over the 2013 to 2017 period. While absorption levels have modestly decreased overall for the Region, absorption levels in the Town of Halton Hills

¹ Land area associated with new construction based on non-residential building activity permits issued throughout Employment Areas across Halton Region.



and the City of Burlington have increased over the past five years compared to the previous five-year period. It is important to note, while employment land absorption has significantly decreased within the Town of Oakville, employment growth on employment lands has become more diversified within the Town of Oakville relative to the existing employment base with a greater share of non-industrial employment (notably office employment).

Figure 3-14
Halton Region Employment Lands Absorption, 2008 to 2012 and 2013 to 2017



3.4.3 Addressing Regional Economic Opportunities.

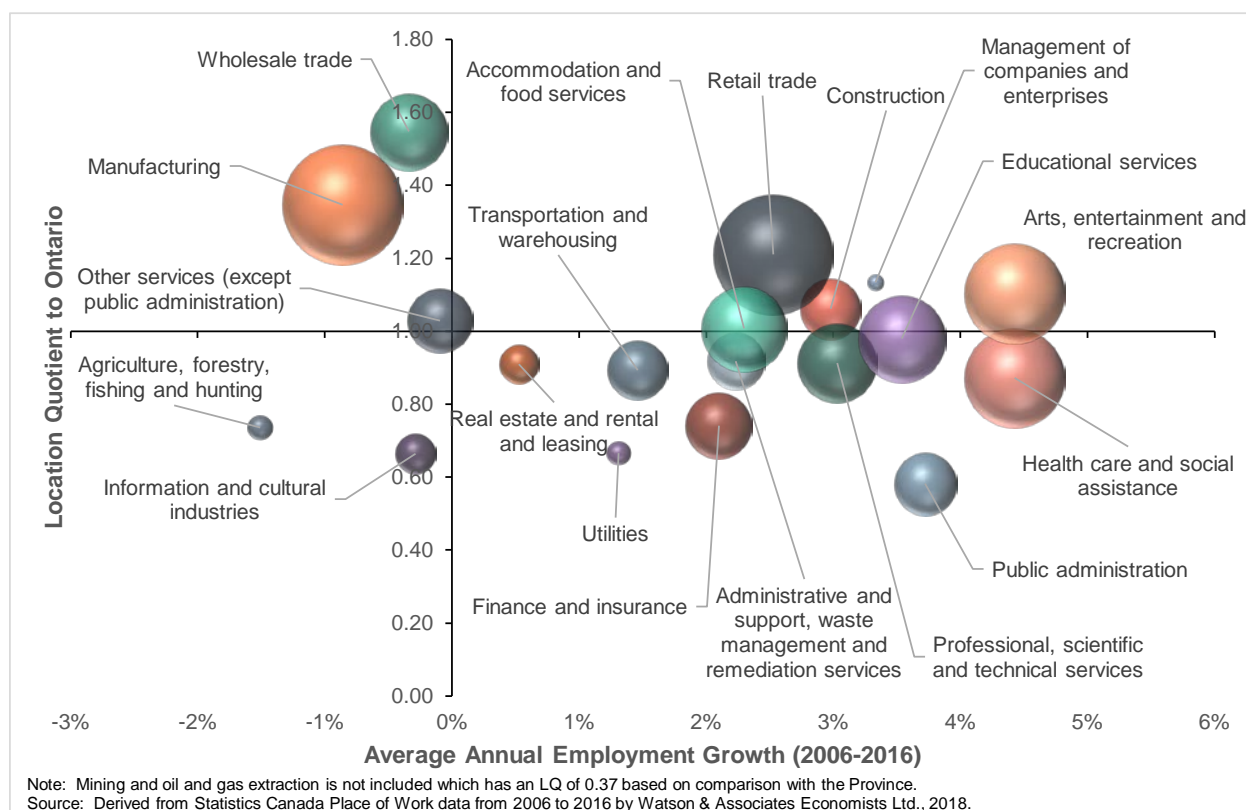
Figure 3-15 illustrates the strength of employment sectors in Halton Region relative to the Province using Location Quotients¹ (L.Q.), size (based on employment) and recent growth trends. As shown, Halton Region has a relatively high employment concentration in retail trade, arts, entertainment and recreation, and construction. The manufacturing and wholesale trade sectors also have a relatively high concentration in the Region, but have experienced a modest decline in employment over the past

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 a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or “cluster.”



decade. Employment in these sectors has shown signs of a rebound in recent years, consistent with trends in the broader economy. In contrast, many emerging “knowledge-based” clusters, including professional, scientific and technical services, finance and insurance, health care and social assistance, educational services, public administration, as well as real estate and rental and leasing have recently been experiencing moderate to strong employment growth.

Figure 3-15
Halton Region Industry Cluster Size and Growth Matrix, 2006 to 2016



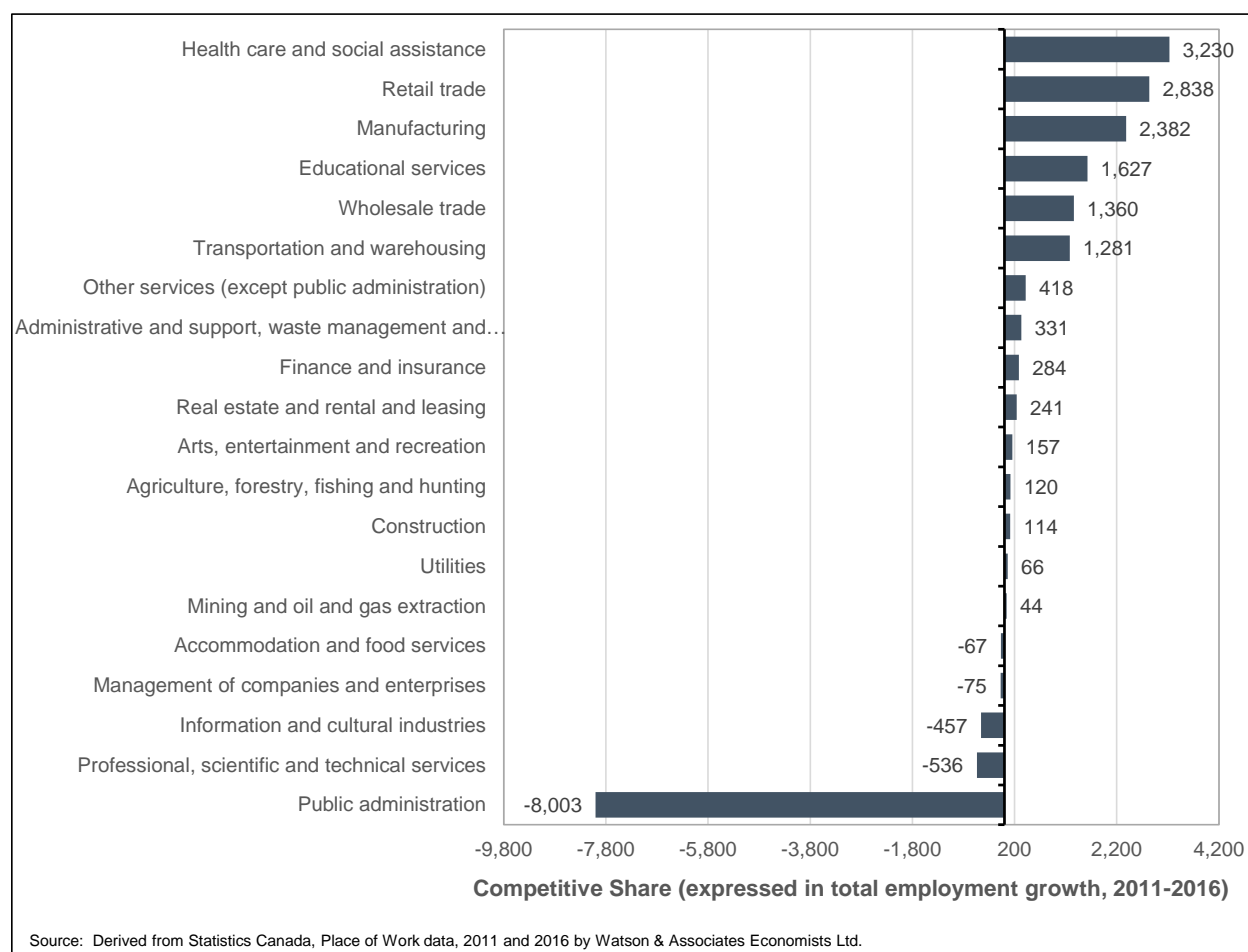
To assess the relative strength of business growth within Halton Region, Figure 3-16 examines employment growth by industry sector over the 2011 to 2016 period in the Region, relative to Ontario. This comparative share analysis helps identify how much faster or slower employment is growing in Halton Region relative to Ontario as a whole, by sector. Industry sectors that generate a strong positive value suggest areas where Halton Region potentially has a competitive advantage relative to the surrounding market with respect to business growth. On the other hand, industry sectors that exhibit



a negative value suggest areas where Halton Region may be at a competitive disadvantage to its neighbouring municipalities.

As illustrated in Figure 3-16, a number of sectors have exhibited a significantly stronger rate of employment growth relative to the Province. These include health care and social assistance, educational services, retail trade, and a number of goods-producing related sectors such as wholesale trade, manufacturing, and transportation and warehousing which are part of the export-oriented economy. Over the same period, Halton Region has experienced a relatively slower rate of employment growth within public administration, professional, scientific and technical services and information and cultural industries when compared to the rest of Ontario.

Figure 3-16
Halton Region Competitive Share Growth Analysis Relative to Ontario, 2011 to 2016





Chapter 4

Local Non-Residential Development Trends and Existing Conditions



4. Local Non-Residential Development Trends and Existing Conditions

This Chapter provides an in-depth discussion regarding local employment conditions and non-residential development trends within the Town of Halton Hills with specific focus on the Town's established Employment Areas. Additional details with respect to recent development trends on employment lands are provided in Appendices A and B.

4.1 Halton Hills Employment Profile

4.1.1 *Employment Growth Trends*

The total employment base for the Town of Halton Hills has grown nearly 45% over the 2001 to 2016 period, increasing from approximately 15,800 to 22,800, as illustrated in Figure 4-1. Since 2001, employment growth has averaged 2.5% annually in Halton Hills, slightly higher than the growth rate in Halton Region.¹ Over the same period, the Town's employment activity rate² has slightly increased from 33% in 2001 to 37% 2016, indicating that the local employment base is increasing at a faster rate than the local population base. As of 2016, the Town's employment activity rate was below that of the Halton Region average.³

¹ Based on Watson's estimate, 2001 to 2016 employment growth in Halton Region has averaged 2.3% annually.

² An employment activity rate is defined as the number of local jobs in a municipality divided by the resident population.

³ Halton Region's employment activity rate was 48% in 2016, derived from Statistics Canada Labour Force data and custom order Statistics Canada Place of Work data.



Figure 4-1
Town of Halton Hills
Employment Base, 2001 to 2016

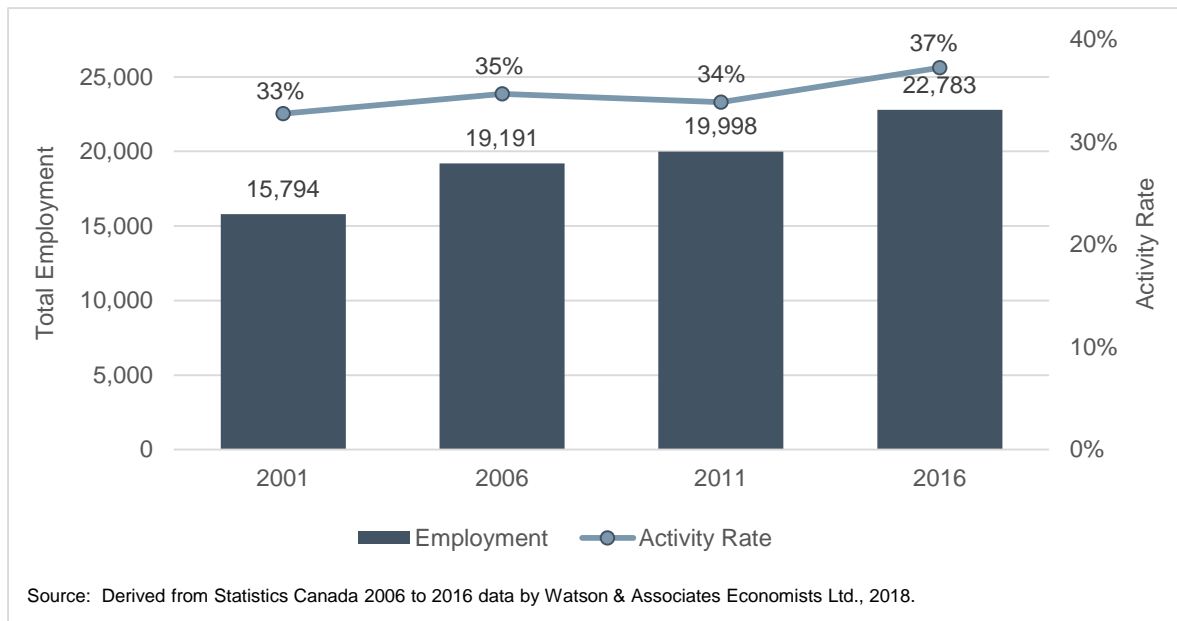


Figure 4-2 summarizes the Halton Hills employment base by sector for 2016. The largest sector in Halton Hills is retail trade which accounts for 22% of the total employment base. Other key sectors in Halton Hills include manufacturing, health care and social assistance, and educational services, which comprise 17%, 9% and 8%, respectively, of the total employment base.



Figure 4-2
Town of Halton Hills
Employment Base by Sector, 2016
(Usual Place of Work)

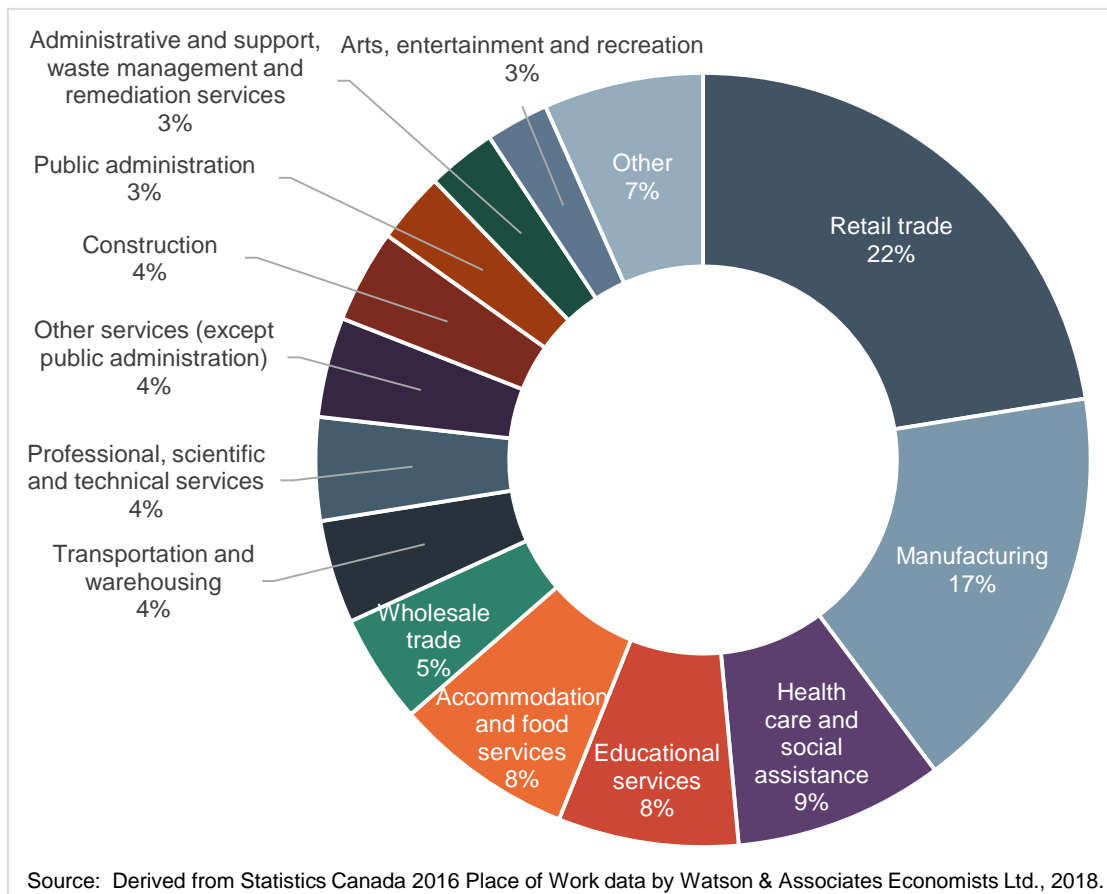


Figure 4-3 summarizes the historical change in the Town of Halton Hills's employment base by usual place of work during the 2001 to 2016 period. Employment represents the number of jobs located within the Town of Halton Hills. This includes the live/work labour force, including work at home employees, as well as in-commuters. Key observations include:

- The Town of Halton Hills serves as a source of labour to the surrounding communities within the G.T.H.A. and beyond. With an estimated total labour force base of 33,900 in 2016, the Town's job base is approximately 11,100 lower (approximately 33%) than its employed labour force base;
- Of the Town's 2016 employment base, approximately 79% of employees are reported as having a usual place of work. The remaining 21% work from home



or are reported as having no fixed place of work (N.F.P.O.W.). Over the past 15 years, the share of Halton Hills's total employment base to the employed labour force has steadily increased from 59% to 67%.

- Within the Town of Halton Hills, the number of work at home and N.F.P.O.W. employees has increased at a faster rate than employees with a usual place of work; and
- Similar to the Province, the structure of Halton Hills's economy has steadily shifted away from traditional good-producing sectors to the retail sector and knowledge-based economy. As of 2016, the retail/accommodation and food sector comprises approximately 27% of the Town's employment base, up from 21% in 2001, and the service sector currently comprises approximately 60% of the Town's employment base, up from 55% in 2001.

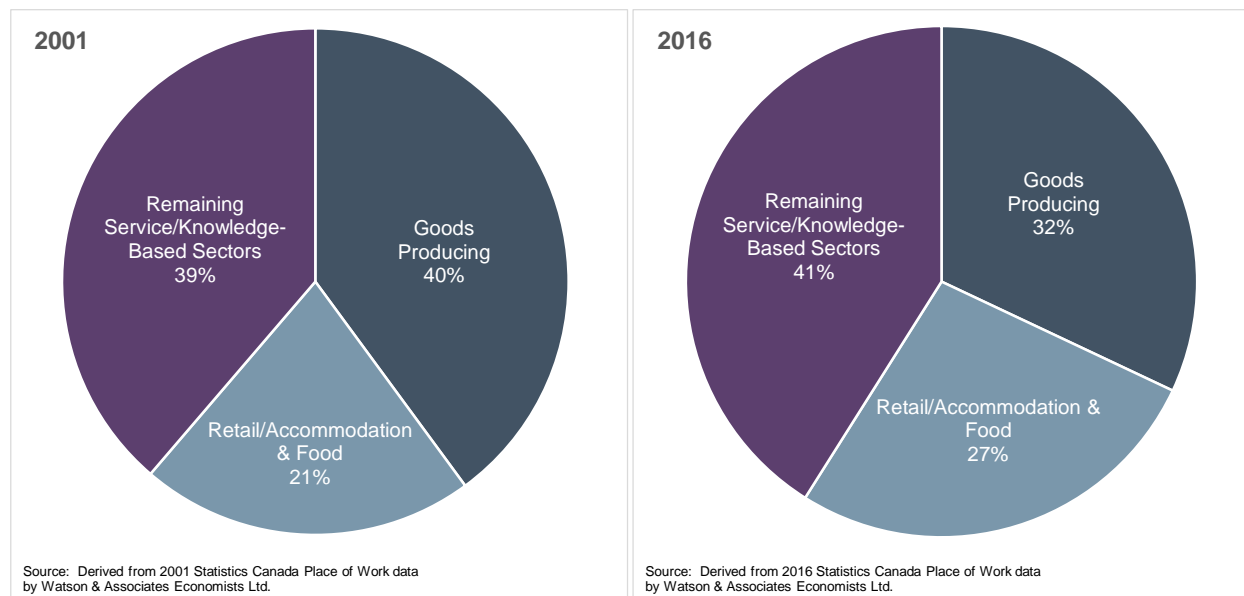
Figure 4-3
Town of Halton Hills
Employment by Place of Work, 2001 to 2016

Town of Halton Hills Historical Employment				Relationship of Employment to Employed Labour Force			
Year	Employed Labour Force	Employment (Usual Place of Work)	Work from Home	No Fixed Place of Work (N.F.P.O.W.)	Total Employment (Including N.F.P.O.W. and Work at Home)	Difference (Employed Labour Force less Total Employment)	Employment as % of Labour Force
2001	26,800	12,500	2,100	1,200	15,800	11,000	0.59
2006	30,700	15,200	2,300	1,700	19,200	11,500	0.63
2011	32,000	15,600	2,400	2,000	20,000	12,000	0.63
2016	33,900	17,900	2,600	2,400	22,800	11,100	0.67

Source: Derived from 2001 to 2016 Statistics Canada Place of Work data by Watson & Associates Economists Ltd.
2011 Labour Force Survey has a sample size of 30% and 2016 Labour Force Survey has a sample size of 25%.



Figure 4-4
Town of Halton Hills
Employment Trends by Major Sector,
2001 to 2016



4.1.2 Labour Force Trends

Figures 4-5 and 4-6 provide additional details with respect to historical labour force growth trends for the Town of Halton Hills between 2001 and 2016. Labour force data represents the number of Halton Hills residents who live in the Town of Halton Hills and are within the labour force, regardless of where they work. This includes residents who live and work within the Town of Halton Hills, including those who work from home, and those who commute outside the Town for work. Key observations include:

- Over the 2001 to 2016 period, the Town's total labour force expanded from 27,700 to 35,700, an increase of 1.7% annually (or 30%) compared to a 44% increase in the total employment base;
- As of 2016, the Town of Halton Hills's total labour force is estimated at approximately 35,700, which represents approximately 12% of the total Halton Region labour force base. Between 2001 and 2016, the Town's share of the Halton Region labour force base has declined slightly from 13% to 12%;



- The unemployment rate within the Town of Halton Hills was recorded at approximately 5.2% in 2016.¹ Comparatively, the Ontario unemployment rate was estimated at 5.4%.² Currently, as of August 2018, the Province of Ontario unemployment rate is estimated at 5.7%;³
- The Town's live-work ratio has declined slightly, from 28% in 2001 to 26% in 2016. From an economic perspective, a higher live-work ratio would be desirable to ensure that the local labour force (i.e. residents of Halton Hills) is better served by the opportunities available in the local employment market (i.e. jobs in Halton Hills); and
- As of 2016, approximately 55% of the Town's labour force base commutes outside the Town for work while approximately 45% lives and works within the Town, works from home or is defined as having no fixed place of work.

Figure 4-5
Town of Halton Hills
Historical Labour Force, 2001-2016

Year	Total Labour Force	Employed Labour Force	Unemployment Rate (%)	Participation Rate (%)
2001	27,700	26,800	3.1%	74.9%
2006	32,100	30,700	4.1%	75.1%
2011	34,200	32,000	6.6%	74.6%
2016	35,700	33,900	5.2%	73.3%

Source: Derived from 2001 to 2016 Statistics Canada Census, and Place of Work data by Watson & Associates Economists Ltd.

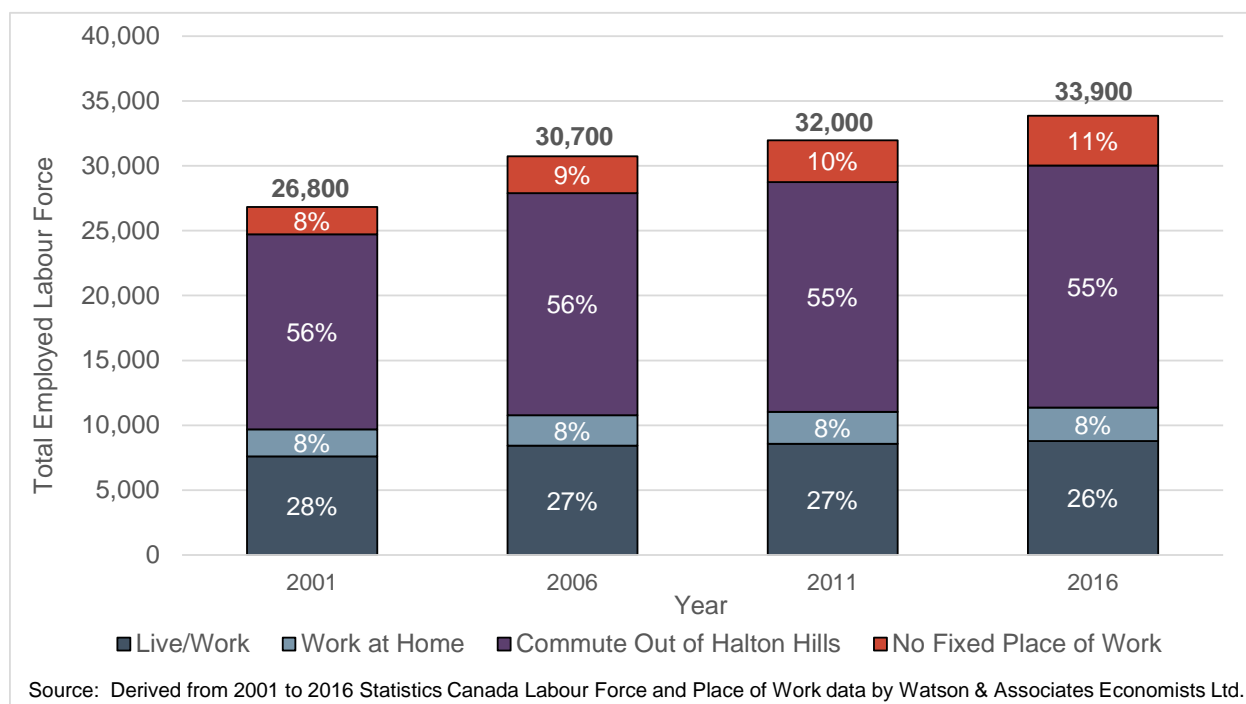
¹ Unemployment rate based on Statistics Canada 2016 Census.

² Ibid.

³ Statistics Canada, Labour Force Survey.



Figure 4-6
Town of Halton Hills
Employed Labour by Place of Work, 2006 to 2016



4.1.3 Commuting Trends

Figure 4-7 summarizes where Halton Hills residents commute to for employment, while Figure 4-8 identifies from where those employed in Halton Hills commute. Residents in the Town of Halton Hills primarily work in the Town of Halton Hills (32%), the City of Mississauga (23%), the City of Brampton (13%) and the City of Toronto (11%). Of the total Halton Hills employment base by usual place of work, 50% of jobs are held by Halton Hills residents,¹ while the majority of the remaining employees commute from other municipalities in the western G.T.A. including Brampton, Mississauga and Milton.

¹ 8,900 live/work; 17,900 total employment by usual place of work.



Figure 4.7
Where Town of Halton Hills Residents Go to Work, 2016

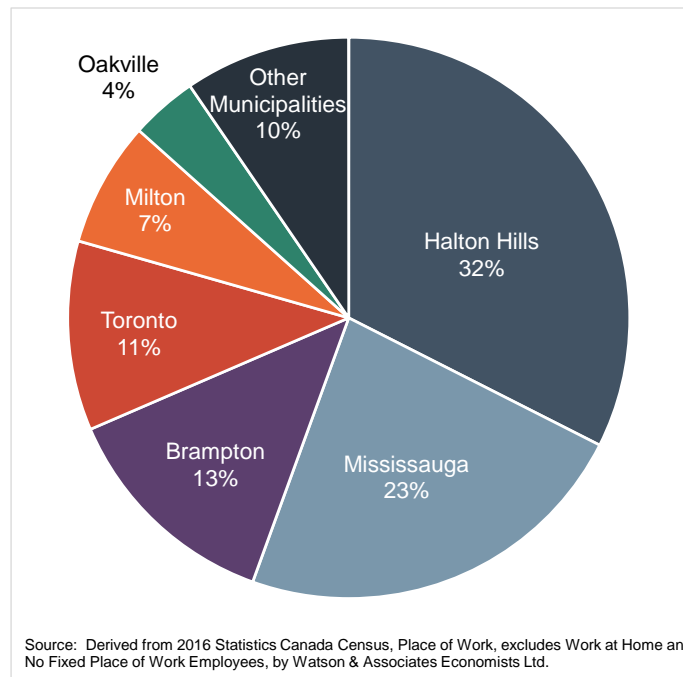
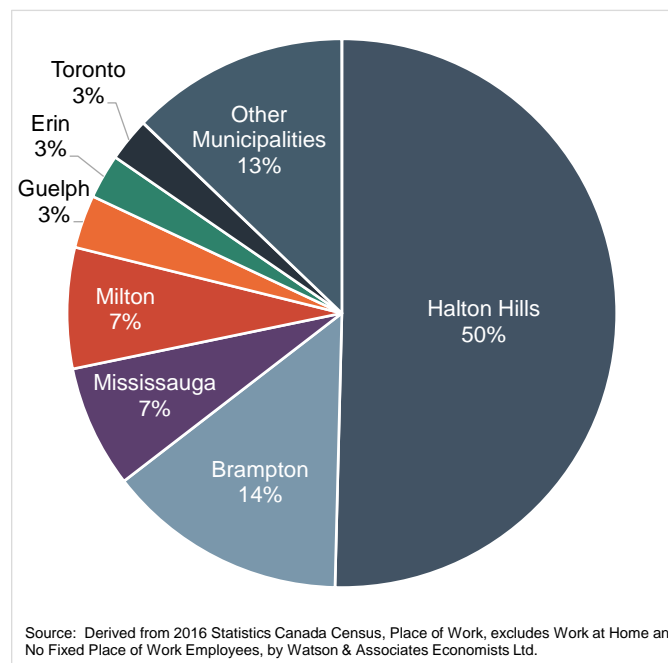


Figure 4-8
Where Town of Halton Hills Employees Commute From, 2016





4.2 Non-Residential Development Trends

4.2.1 Non-Residential Building Permit Trends, 2008 to 2017

Figure 4-9 summarizes annual non-residential development activity in the Town of Halton Hills between 2008 and 2017 by major sector. Over the past 10 years, non-residential development activity (gross floor area (G.F.A.) has ranged between 5,800 to 179,900 sq.m (62,000 to 1.9 million sq.ft.), averaging approximately 54,900 sq.m (591,000 sq.ft.) per year.

Since 2012, the Town has experienced steady non-residential development activity with the exception of 2014.¹ The average level of non-residential G.F.A. over the past five years has increased 44% relative to the 10-year average. Over the past 10 years, industrial² uses have accounted for the largest share of non-residential development at approximately 71% of the non-residential G.F.A., followed by the commercial sector at 23% and the institutional sector at 6%. During the historical period reviewed, approximately 78% of total non-residential development activity within the Town has occurred on employment lands.

¹ Based on building permit activity there was limited development activity in 2014.

² Industrial generally includes developments for manufacturing, transportation and warehousing and wholesale trade.



Figure 4-9
Town of Halton Hills
Non-Residential Building Permit Development Activity, G.F.A. (sq.ft.) by Sector,
2007 to 2016

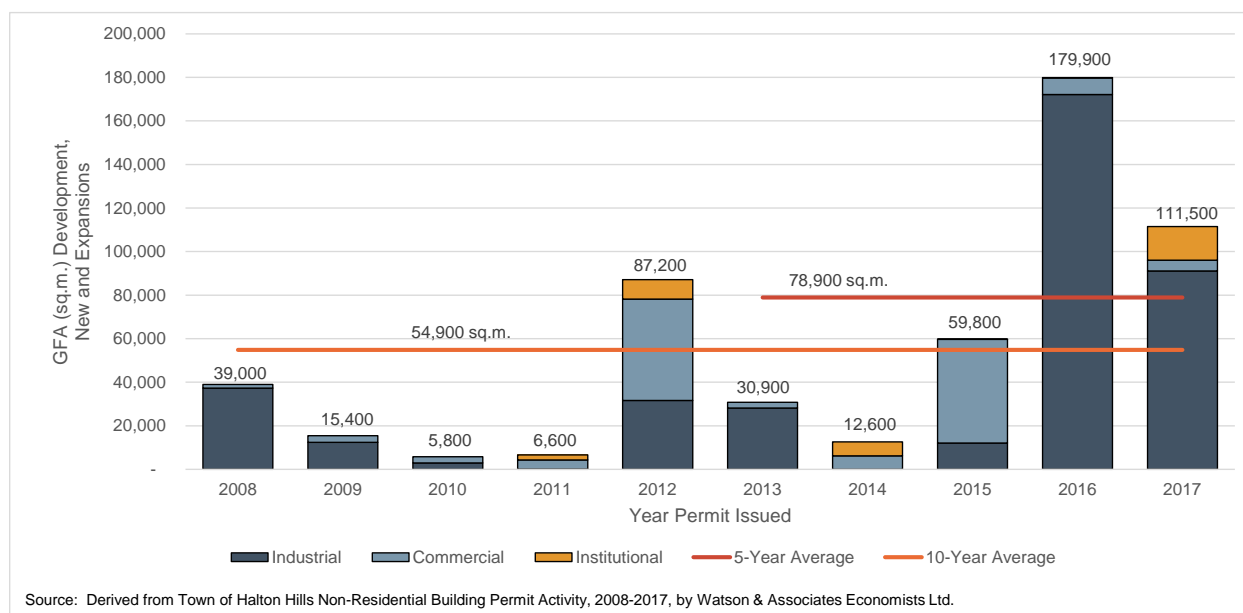


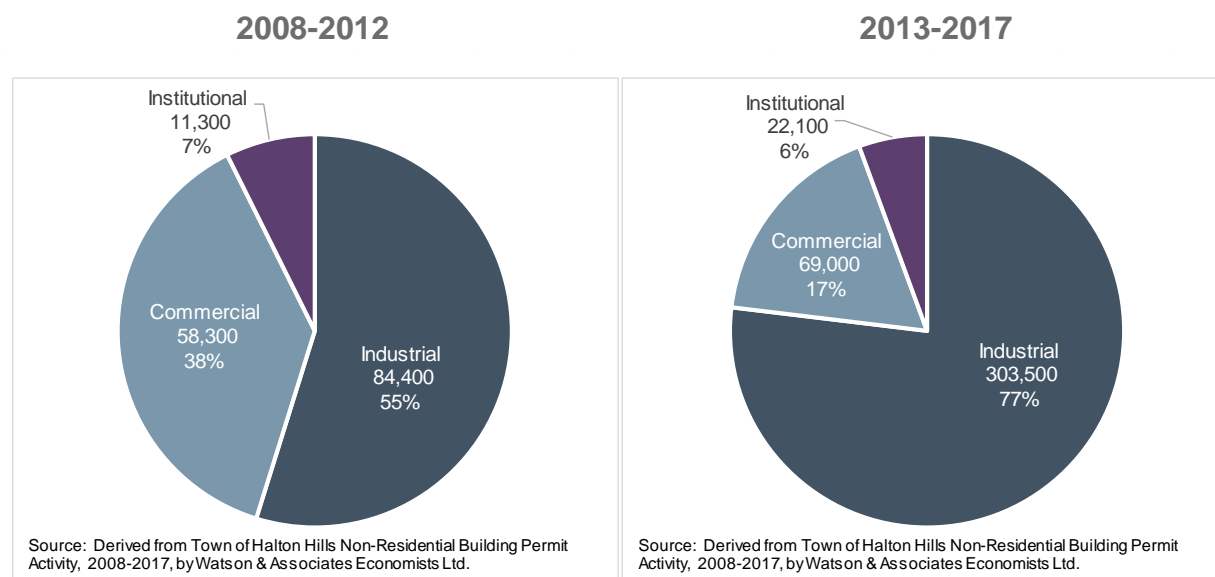
Figure 4-10 summarizes non-residential development activity (G.F.A. in sq.m) during the 2008 to 2012 and 2013 to 2017 periods. During these two periods, the share of industrial development has increased relative to total non-residential development as a result of strong development activity in the logistics sector concentrated in the Premier Gateway Employment Area. Recent mid to large-scale industrial developments over the past few years include three distribution facilities in the Premier Gateway Employment Area of 72,000, 59,500 and 5,200 sq.m, respectively (775,000, 640,000 and 56,500 sq.ft., respectively).

During the 2008 to 2012 period, the commercial sector experienced a large share in total non-residential development, attributed from the Toronto Premium Outlets mall development within the Premier Gateway Employment Area. The Toronto Premium Outlets mall currently offers approximately 32,400 sq.m (368,000 sq.ft.) of retail space and is set to expand by 13,000 sq.m (140,000 sq.ft.) in November 2018.¹ A more detailed review of forecast trends in this area is provided in Chapter 6.

¹ Figures are based on SmartCentres and Simon joint press release dated September 17, 2018.



Figure 4-10
Town of Halton Hills
Non-Residential Building Permit Development Activity, G.F.A. (sq.m) by Sector, 2008 to
2012 and 2013 to 2017



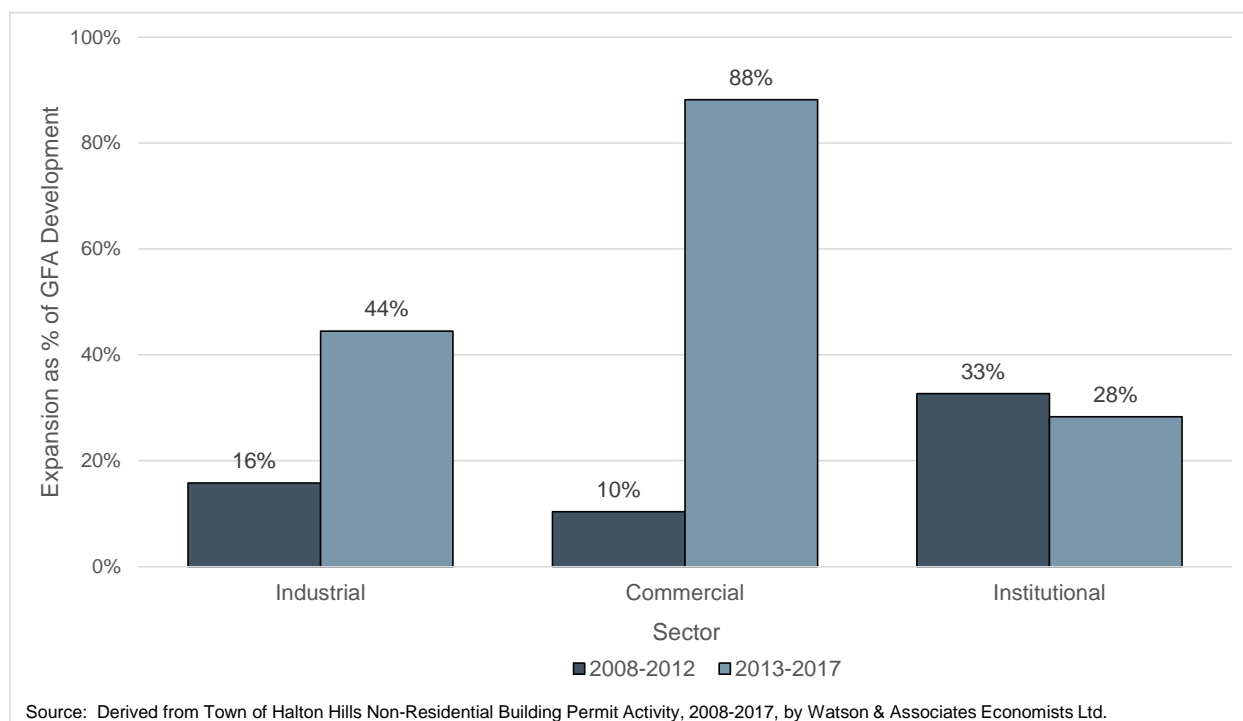
Over the 2008 to 2017 period, expansions (additions to buildings and additional buildings on site)¹ accounted for 41% of the new non-residential G.F.A. added to the Town of Halton Hills non-residential real estate market. Over the past 10 years, non-residential expansions have averaged 22,500 sq.m (242,000 sq.ft.) annually.

Figure 4-11 summarizes expansions as a share of total non-residential development activity between 2008 and 2017. During this time period, expansions have accounted for just over 40% of total non-residential development activity. Within the industrial sector, expansions accounted for 44% of total non-residential development activity over the past five years, up from 16% between 2008 and 2012. Within the commercial sector, expansions accounted for 88% of total development activity over the past five years, up from 10% in the previous five-year period, largely due to expansions of malls and shopping strips.

¹ Expansions include building additions and infill of existing parcels (additional buildings added to existing developed site). New construction includes the development of a vacant parcel.



Figure 4-11
Town of Halton Hills
Expansion as a Share of Total Non-Residential¹
Building Permit Development Activity, 2008 to 2017



4.3 Employment Lands Profile

4.3.1 Employment Lands Overview

Employment lands in Halton Hills is an integral part of the Town's economic development potential and accommodate a significant share of the Town's businesses and employment. As previously mentioned, the Town of Halton Hills has four designated Employment Areas, including:

- Acton Industrial Area;
- Georgetown Industrial Area;
- Mansewood Industrial Area; and

¹ Expansions include building additions and infill of existing parcels (additional buildings added to existing developed site).



- Premier Gateway Employment Area.

A total of 395 net ha (976 net acres) of employment lands were identified as developed within the Town of Halton Hills as of mid-year 2018, comprising an industrial inventory of 1.27 million sq.m (13.7 million sq.ft.).

Figure 4-12 summarizes the distribution of developed employment lands within the Town of Halton Hills as of Mid-2018. The majority of the Town's developed employment lands are located within the Premier Gateway and Georgetown Industrial Area, accounting for 50% and 27% of the total, respectively. The Acton Industrial Area accounts for 17% of total developed lands. The Mansewood Industrial Area is relatively small in size, accounting for 6% of the remaining total.

Figure 4-12
Town of Halton Hills
Distribution of Developed Employment Lands (Gross Land Area), 2018

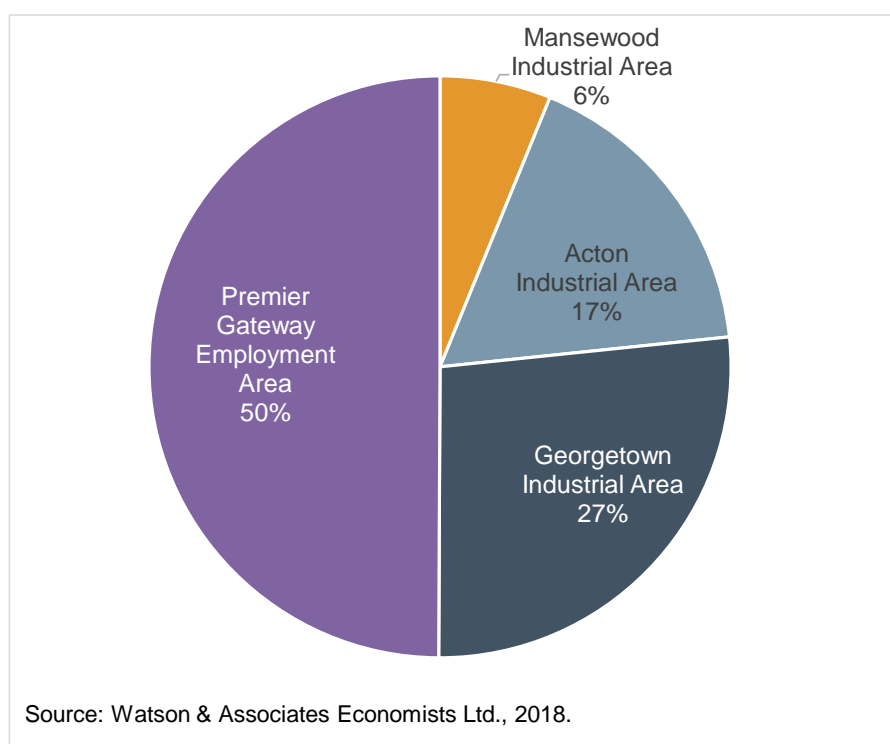
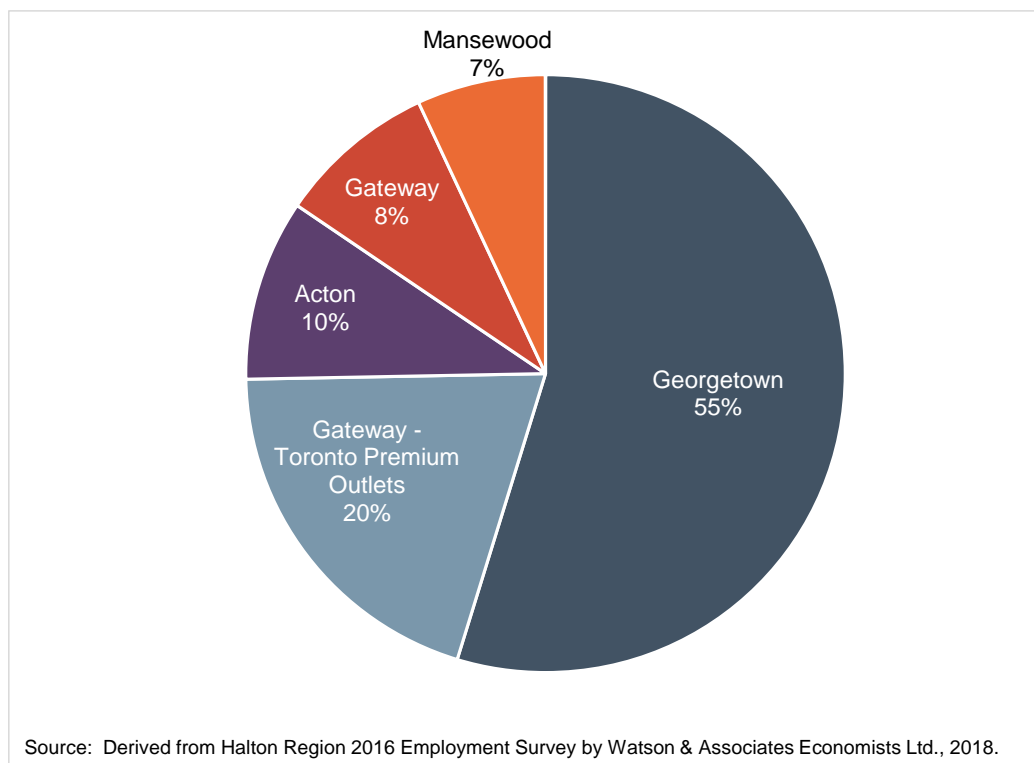


Figure 4-13 summarizes the percentage distribution of employment across the Town's Employment Areas as of 2016. While the Premier Gateway Employment Area accounts for almost half of the Town's development employment land base, this area only comprises approximately 28% of the Town's existing employment base on employment



land, as a result of the relatively low average employment density for this area. In contrast, approximately 55% of the Town's employment base on employment lands is located in the Georgetown Industrial Area. The Acton Industrial Area and the Mansewood Industrial Area account for the remaining 10% and 7% of the Town's existing employment base on employment lands, respectively.

Figure 4-13
Town of Halton Hills
Percentage Share of Existing Employment on Employment Lands, 2016

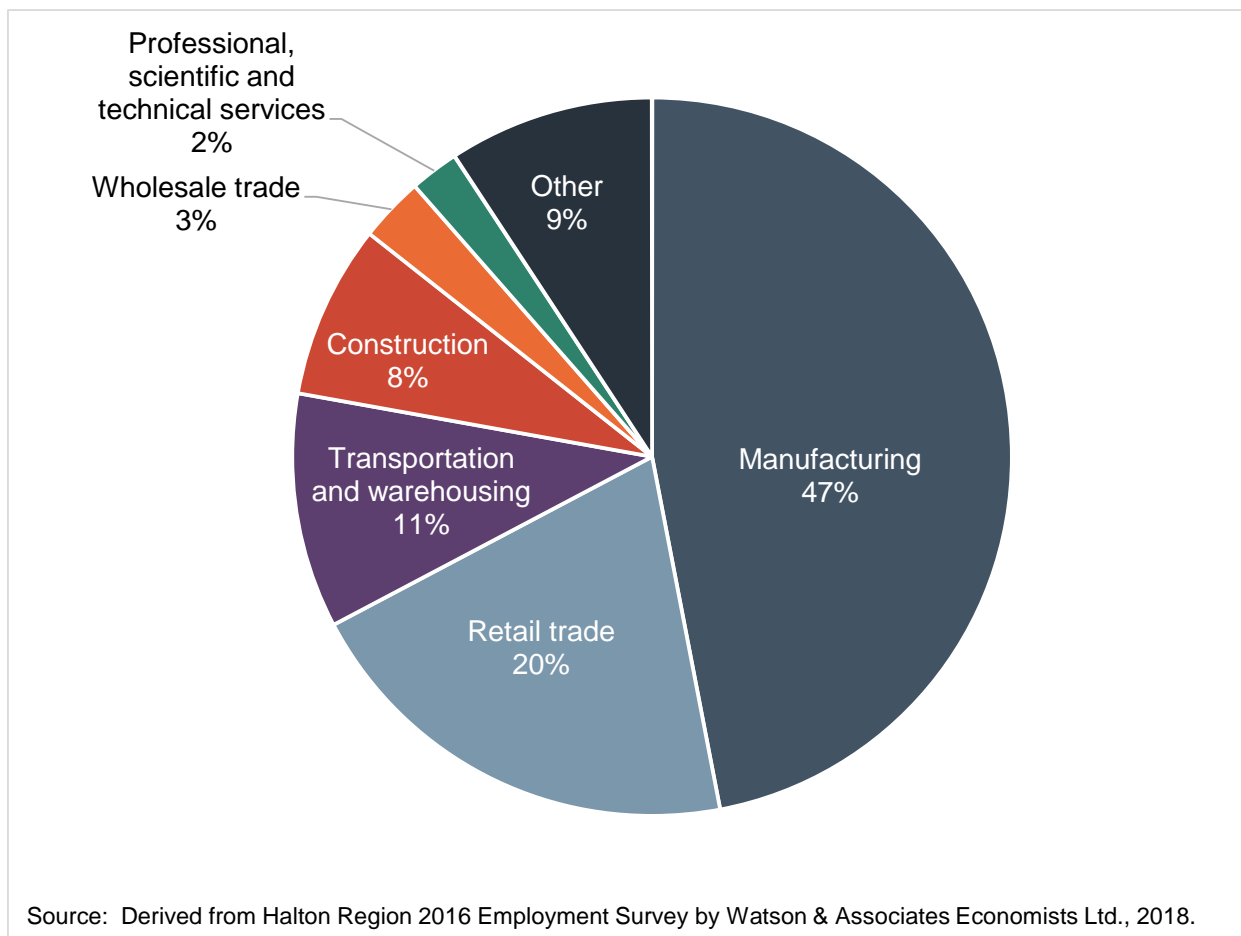


4.3.2 Existing Employment Lands Employment by Sector

As summarized in Figure 4-14, the Town's developed employment lands accommodate businesses across a broad range of employment sectors, including manufacturing (47% of total employment lands employment base), retail trade (20%), transportation and warehousing (11%), construction (8%), wholesale trade (3%) and professional, scientific and technical services (2%). In total, the Town's existing developed Employment Areas accommodate approximately 8,420 onsite and offsite jobs, representing 44% of the Town's estimated employment as of 2016.



Figure 4-14
Town of Halton Hills
Employment on Employment Lands by Sector, 2016

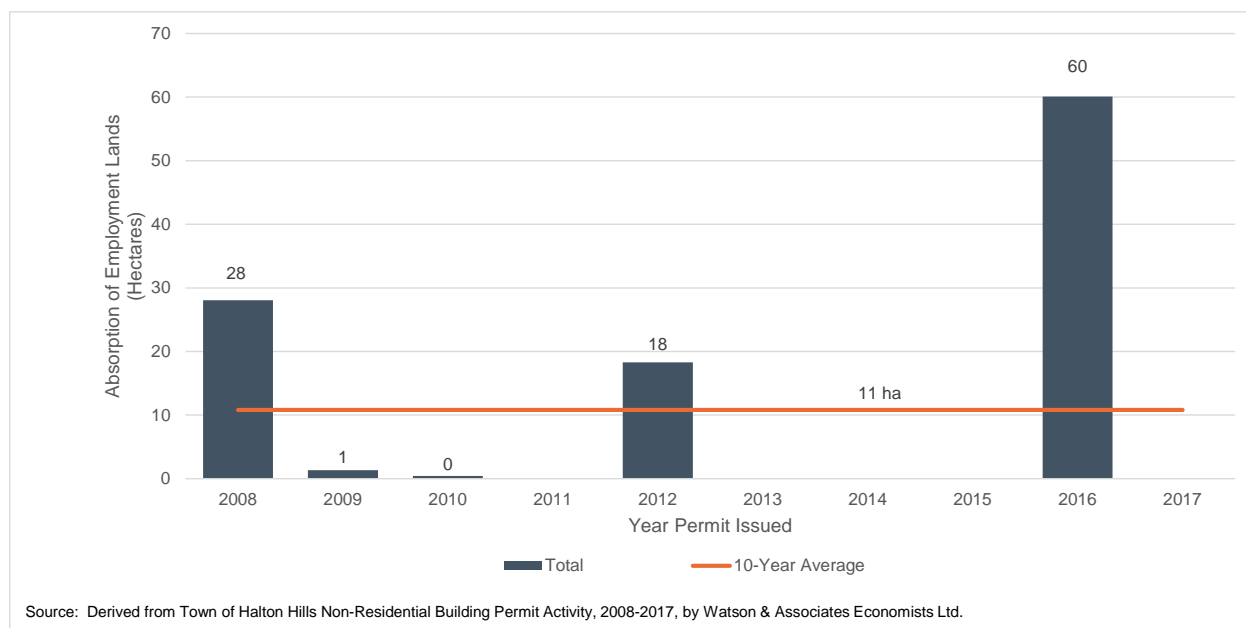


4.3.3 Employment Lands Historical Absorption

Figure 4-15 summarizes annual absorption of employment lands within the Town of Halton Hills over the past decade (2008 to 2017) including the Toronto Premium Outlets mall. During this period, employment land absorption levels averaged approximately 11 net ha (27 net acres) per year. Annual employment lands absorption was relatively strong in 2008, 2012 and 2016, with no or relatively weak absorption during the other periods. It is noted that the Toronto Premium Outlets mall accounted for approximately 18 net ha (44 net acres) of absorption within the Premiere Gateway Employment Area in 2012.



Figure 4-15
Town of Halton Hills
Annual Employment Lands Absorption (Net ha), 2008 to 2017¹



¹ Note: Absorption figures include the Toronto Premium Outlets mall.

The majority (50%) of sites absorbed on employment lands over the past 10 years have been mid-sized parcels ranging from 2 to 5 ha (5 to 12 acres). The vast majority (70%) of new building construction on employment lands has been comprised of large stand-alone industrial facilities (primarily in the warehousing and transportation sector) ranging from 14,000 to 28,000 sq.m (150,000 to 300,000 sq.ft).

4.4 Regional Competitiveness of Halton Hills Employment Lands

A significant 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. The cost competitiveness of development on employment lands is examined herein, through a series of pro-forma financial analyses. This examination (additional details are provided in Appendix C) assesses the cost of constructing and operating (reflecting property taxes) various prototypical industrial/office developments within the Town of Halton



Hills, as well as several other comparator municipalities within the broader regional market area.

It is important to note that competitiveness for a municipality includes other factors, such as providing a community with a good quality of life. Quality of life is a 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 a number of 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. The Town of Halton Hills has a reputation for being a vibrant, growing, affordable, low-crime location in which to live in G.G.H., with access to a wide range of recreational opportunities within Halton Region and surrounding area.¹

For the purposes of this exercise, three prototypical developments were assessed, including a 300,000 sq.ft. (27,900 sq.m) and 750,000 sq.ft. (69,700 sq.m) industrial facility and a 150,000 sq.ft. (13,940 sq.m) one-storey flex office building. The physical characteristics of the three-building typologies and their respective land requirements are summarized in Figure 4-16.

Figure 4-16
Prototypical Building Typologies

Building Type	Building GFA (sq.ft.)	Floor Space Index	Land Area	
			Net ha	Net Acres
Industrial Building	300,000	38%	7.3	18.1
	750,000	40%	17.4	43.0
Flex Office Building	150,000	30%	4.6	11.5

Source: Watson & Associates Economists Ltd.

¹ MoneySense journal ranked Halton Hills in 2018 favourably as one of the top 10 municipalities to live in Canada due to its quality of life indicators. MoneySense online article, <https://www.moneysense.ca/spend/real-estate/canadas-best-places-to-live-25-2018/>, accessed January 2, 2018.



4.4.1 Total Development Annualized Cost Framework

The cost competitiveness of the select prototypical industrial and flex office developments was assessed through a review of total development cost and the impact of operating costs (property taxes) in the Town of Halton Hills and the comparator municipalities.

In the generation of the total development cost of the prototypical developments (expressed in dollars per sq.ft.), the following input costs were included:

- **Land Cost** – average price of serviced vacant employment land per acre based on market data, multiplied by the acreage requirement based on an assumed F.S.I.,¹ e.g. 30%, divided by the G.F.A. for the building size being considered (e.g. (60,000 sq.ft.) (5,574 sq.m));
- **Construction Costs**² – reflects hard construction costs (e.g. materials, labour) and soft costs (e.g. engineering, consulting services); average construction costs per sq.ft. vary by development type;
- **Development Charges** – on a sq.ft. basis, calculated based on the current upper- and lower-tier or single-tier municipal schedules and school board DC schedules;
- **Developer Project Profit** – a flat percentage of the total cost (land + construction + D.C.s + building permit fees per sq.ft.) at 5%; and
- The sum of (A) to (D) yields total development cost.

The total development cost was then annualized³ to determine the average annual cost of developing a building over a defined period (i.e. 25 years) to compare with annual operating costs.

Annual operating costs for each prototypical development were determined from an assessment of property taxes based on current local tax rates, with annual property taxes estimated based on average assessment value. The property assessment values

¹ Floor Space Index (FSI).

² Construction costs derived from various market sources by Watson & Associates Economists Ltd. Construction costs vary by municipality based on location factors provided in 2018 RSMeans Building Construction Costs data.

³ Annualized costs determined using an annualization factor of 6.5%, based on a 25-year period and discount rate of 4.1% which is representative of industry trends.



were established from a survey of comparable developments utilizing MPAC property assessment data to derive approximate municipal-specific assessment values, which formed the basis for calculating annual property tax estimates.

The annual operating costs (i.e. property taxes) were combined with the annualized development costs to generate the total annualized cost per sq.ft. within each location surveyed.

4.4.2 Development/Operating Costs Comparative Assessment

The following provides a summary of total annualized costs for the prototypical non-residential developments in the Town of Halton Hills and the surveyed comparator municipalities. Detailed results are presented in Appendix C.

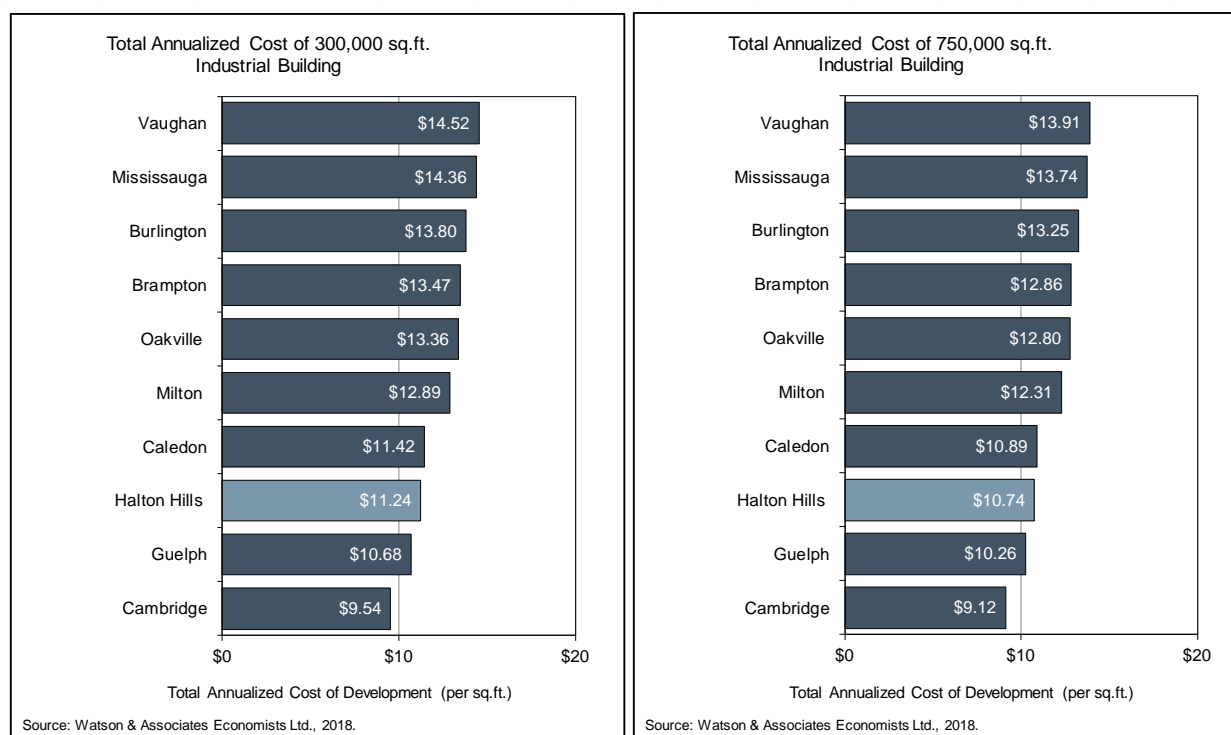
Industrial Development

Figure 4-17 summarizes the total annualized cost (expressed in dollars per sq.ft.) for a 300,000 sq.ft. (27,900 sq.m) and 750,000 sq.ft. (69,700 sq.m) industrial building, within the municipalities surveyed. Key observations include:

- Annualized cost of industrial development (expressed in dollars per sq.ft.) for a 300,000 (27,900 sq.m) sq.ft. building, ranges between \$9.54 and \$14.29 per sq.ft., and lower for a 750,000 sq.ft. (69,700 sq.m) building, ranging between \$9.12 and \$13.91 per sq.ft. Annualized cost of industrial development in Halton Hills is estimated at \$11.24 per sq.ft. and \$10.74 per sq.ft. for a prototypical 300,000 (27,900 sq.m) sq.ft. and 750,000 sq.ft. (69,700 sq.m) building, respectively;
- Cost of development (on a square foot basis) for industrial development generally declines as building size increases, due to a lower construction cost per sq.ft. and higher land utilization (higher coverage); and
- Halton Hills is cost competitive for industrial development, with the total annualized cost notably lower than the rest of Halton Region (Burlington, Oakville and Milton, respectively), and the G.T.A. communities of Brampton, Mississauga and Vaughan. Caledon was the only G.T.A. community surveyed with a comparable cost. The G.G.H. “Outer Ring” municipalities of Guelph and Cambridge have a lower cost of industrial development than Halton Hills.



Figure 4-17
Total Annualized Costs per Sq.ft. of Industrial Development



Office Development

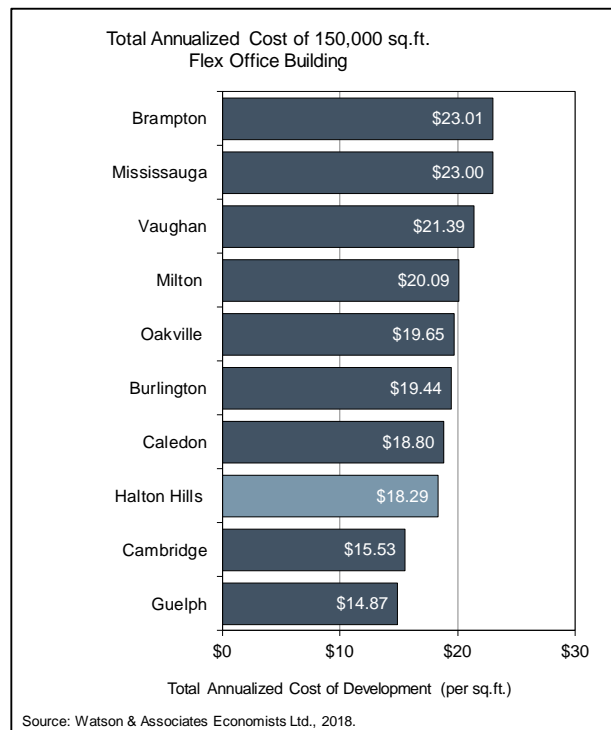
Figure 4-18 summarizes the total annualized cost (expressed in dollars per sq.ft.) for a 150,000 sq.ft. (13,900 sq.m) flex office building, within the municipalities surveyed.

Highlights include:

- The annualized cost of a 150,000 sq.ft. (13,900 sq.m.) flex office building development ranges between \$14.87 and \$23.01 per sq.ft. In Halton Hills, the annualized cost is estimated at \$18.29 per sq.ft.;
- Of the municipalities surveyed, Brampton and Mississauga have the highest total annualized cost of development for flex office buildings, followed by Vaughan. Halton Hills has a comparatively low annualized cost of development for flex office buildings, with only Cambridge and Guelph having a lower cost.



Figure 4-18
Total Annualized Cost per Sq.ft. of Flex Office Development



On average, the Town of Halton Hills is cost competitive among the comparator markets for industrial and flex office development. This is attributed largely to lower development costs (i.e. the cost of land and D.C.s) than comparator G.T.A. municipalities.



Chapter 5

Employment Lands Supply



5. Employment Lands Supply

5.1 Introduction

This Chapter summarizes the supply of gross and net vacant, designated employment land by geographic area within the Town of Halton Hills. In generating this inventory, all parcels designated in the Town's O.P. as "General Employment Area," "Prestige Industrial Area," and "Gateway Area" and located within an urban area have been reviewed. The analysis was completed primarily through a desktop review using geographic information systems (G.I.S.) mapping software. Spatial overlays utilized to develop the net land supply included parcel fabric, land-use layers, building footprints, hydrology/wetlands and orthophotos.

5.2 Greenfield Supply

The employment land supply has been carried out in accordance to the guidelines in the 2017 Growth Plan and the Land Needs Assessment Methodology for the Greater Golden Horseshoe (G.G.H.). As summarized in Figure 5-1, the Town of Halton Hills has approximately 644 gross hectares (1,590 gross acres) of vacant employment land as of August, 2018. This includes approximately 83 gross hectares (205 gross acres) of employment lands subject to Official Plan Amendment (O.P.A.) 31B, these lands are currently not designated and are under appeal.¹

It is important to note that a large portion of the Town's vacant designated employment lands supply is impacted by the G.T.A. West Corridor Protection Area (G.T.A. W.C.P.A.), lands that identified for a potential new provincial highway. Approximately 347 gross hectares (857 gross acres) of designated employment lands within the Premier Gateway Employment Area were initially a part of the study area for the G.T.A. West Corridor. Based on further conceptual plans from the province, the land area potentially impacted by the G.T.A. West Corridor has been reduced. It is important to

¹ On June 11, 2018, Council for the Town of Halton Hills adopted by by-law, Official Plan Amendment Official Plan Amendment No. 31B regarding the Premier Gateway Phase 1B Secondary Plan. The Notice of Adoption was completed on June 20, 2018. The technical and supportive studies, including as Secondary Plan were prepared for the Official Plan Amendment.



note that the spatial analysis prepared by the Town of Halton Hills regarding the land area impacted by the G.T.A. West Corridor. is an estimate based on conceptual plans prepared by the province. It is further assumed that by 2041, some of the lands in the Premier Gateway Employment identified as G.T.A. W.C.P.A. will be available for development. Adjusted for the non-developable lands within the G.T.A. W.C.P.A. (approximately 180 gross hectares (445 gross acres) within the Premier Gateway Employment Area) it is estimated that the Town of Halton Hills has an adjusted vacant employment land supply of approximately 464 gross hectares (1,146 gross acres) of vacant employment land as of August, 2018.

In determining the vacant land inventory on a net basis, adjustments for environmental features, utility corridors and hydrological features were identified. Further, larger vacant parcels (i.e. 2 ha/5 acres or greater) which were not considered shovel-ready were also subject to an additional downward adjustment to reflect internal infrastructure (i.e. roads, stormwater ponds, easements, etc.) with a net to gross adjustment of 80%. In accordance with these above adjustments, the total net vacant land supply is approximately 376 net ha (929 net acres).¹

The Land Needs Assessment Methodology requires the municipality to identify “Built Employment Areas” separately from “Newly Developing Employment Areas,” as such Figure 5-1 summarizes the vacant designated employment land supply by the two area types. Generally, Built Employment Areas include older employment areas, while Newly Developing Employment Areas include areas that are recently designated but currently unbuilt.² The purpose of this distinction is to recognize the potential differences in employment density, future built-form and land-use, and intensification opportunities. The Land Needs Assessment Methodology does not require the identification of designated Employment Areas that are within a delineated greenfield area for the purposes of summarizing the employment land supply and calculating employment land needs.³

¹ Based on a G.T.A. W.C.P.A. of 180 gross hectares.

² Land Needs Assessment Methodology for the Greater Golden Horseshoe, p. 95.

³ Employment Areas within delineated greenfield areas are removed from the delineated greenfield area for the purposes of summarizing and determining the land need for Community Area by policy area.



Within the Town of Halton Hills context, Newly Developing Employment Areas include the designated Premier Gateway Employment Area, while the remaining Employment Areas are categorized as Built Employment Areas. As summarized in Figure 5-1, the Newly Developing Employment Area, Premier Gateway Employment Area has the largest share of the Town's vacant designated employment land supply (approximately 89%), followed by the Acton Industrial Area (approximately 10%). The remaining Employment Areas, Georgetown Industrial Area and the Mansewood Industrial Area, account for less than 2% of the available vacant employment lands in the Town of Halton Hills.



Figure 5-1
Town of Halton Hills
Designated Occupied and Vacant Employment Lands by Employment Area
as of August 2018 (Hectares)

Employment Areas	Developed Land Area, Ha ¹		Underutilized ⁴	Vacant Employment Lands			
				All Employment Lands ⁵		Anticipated Available for Development by 2041, Net of GTA W.C.P.A. Refined Corridor ⁸	
	Gross ²	Net ³	Net	Gross ⁶	Net ⁷	Gross	Net
Built Employment Areas							
Acton Industrial Area	80	71	13	45	34	45	34
Georgetown Industrial Area	125	117	19	2	2	2	2
Mansewood Industrial Area ⁹	29	24	0	5	5	5	5
Total Built Employment Area	234	212	33	51	41	51	41
Newly Developing Employment Areas							
Premier Gateway Employment Area	233	183	3	510	404	330	260
Built Employment Areas and Newly Developing Employment Areas							
Total Designated Employment Areas	467	395	36	562	445	382	301
Outside Regional Employment Areas							
Premier Gateway Employment Area - OPA 31B Lands	0	0	0	83	75	83	75
Total	467	395	36	644	520	464	376

Source: Watson & Associates Economists.

¹ Developed employment lands includes occupied and underutilized parcels.

² Gross land area excludes environmental features, electricity transmission lines, freeways, as defined by and mapped as part of the Ontario Road Network; and cemeteries.

³ Net land area based on parcel fabric. Non-developable parcels are excluded, internal infrastructure such as stormwater retention ponds and parkland area excluded.

⁴ Underutilized parcels that may have intensification potential. Refer to Figure 5-5 for detailed information on underutilized sites in the Georgetown and Acton Industrial Areas.

⁵ Includes a summary of all Employment Areas. All designated Employment Areas are included including the lands within the GTA West Corridor Protection Area.

⁶ Gross land area excludes environmental features, electricity transmission lines, freeways, as defined by and mapped as part of the Ontario Road Network; and cemeteries.

⁷ Net land area based on developable parcel fabric. Net to gross assumption of 80% applied for vacant lands for large unsubdivided parcels in the Acton Industrial Area and the Premier Gateway Employment for local roads, stormwater and utilities.

⁸ The study area of the GTA West Corridor Protection Area within designated Employment Areas in the Premier Gateway Employment Area is approximately 347 ha gross in land area. Based on GIS data obtained from the Town of Halton Hills, Watson has estimated a refined protection area that reflects the approximate area and route of the proposed GTA West Highway and Interchange.

⁹ The Mansewood Industrial Area is a privately serviced industrial area.



The Town also has two large blocks of Future Strategic Employment Areas, adjacent to the designated Employment Areas of Mansewood Industrial Area and Premier Gateway Employment Area, totalling 1,130 gross ha (2,790 gross acres), excluding the lands subject to O.P.A. 31B. As noted in the Town of Halton Hills Official Plan, the purpose of the Future Strategic Employment Areas, “is to identify and protect from incompatible uses certain lands that are strategically located with respect to major transportation facilities and existing Employment Areas and are best suited for employment beyond the planning horizon of this Plan.”¹ Future Strategic Employment Areas are also identified in the Region of Halton Official Plan as amended by Regional Official Plan Amendment No. 38 (ROPA 38).

Figure 5-2
Town of Halton Hills
Future Strategic Employment Lands (Not Designated)²

Employment Area	Future Strategic Employment Area (F.S.E.A.), Land Area (Gross ha)	
Premier Gateway Employment Area ¹	901	80%
Mansewood Industrial Area	229	20%
Total Halton Hills Employment Areas	1,130	100%

Source: Watson & Associates Economists Ltd., 2018.

¹ Excludes the OPA 31B Lands of approximately 83 gross hectares as previously summarized in Figure 5-1.

Figures 5-3a through 5-3d geographically illustrate the location of the Town’s developed and vacant employment land supply by Employment Area. The area of the G.T.A.

¹ Town of Halton Hills Official Plan, D-81.

² Refer to Figures 5-3c (Premier Gateway Employment Area) and 5-3d (Mansewood Industrial Area) for map of Future Strategic Employment Areas.



W.C.P.A is identified in Figure 5-3c (Premier Gateway Employment Area). Within the Town of Halton Hills, there are two Future Strategic Employment Areas which are identified in Figures 5-3c (Premier Gateway Employment Area) and 5-3d (Mansewood Industrial Area).

Figure 5-3a
Town of Halton Hills
Acton Industrial Area
Developed and Vacant Employment Lands

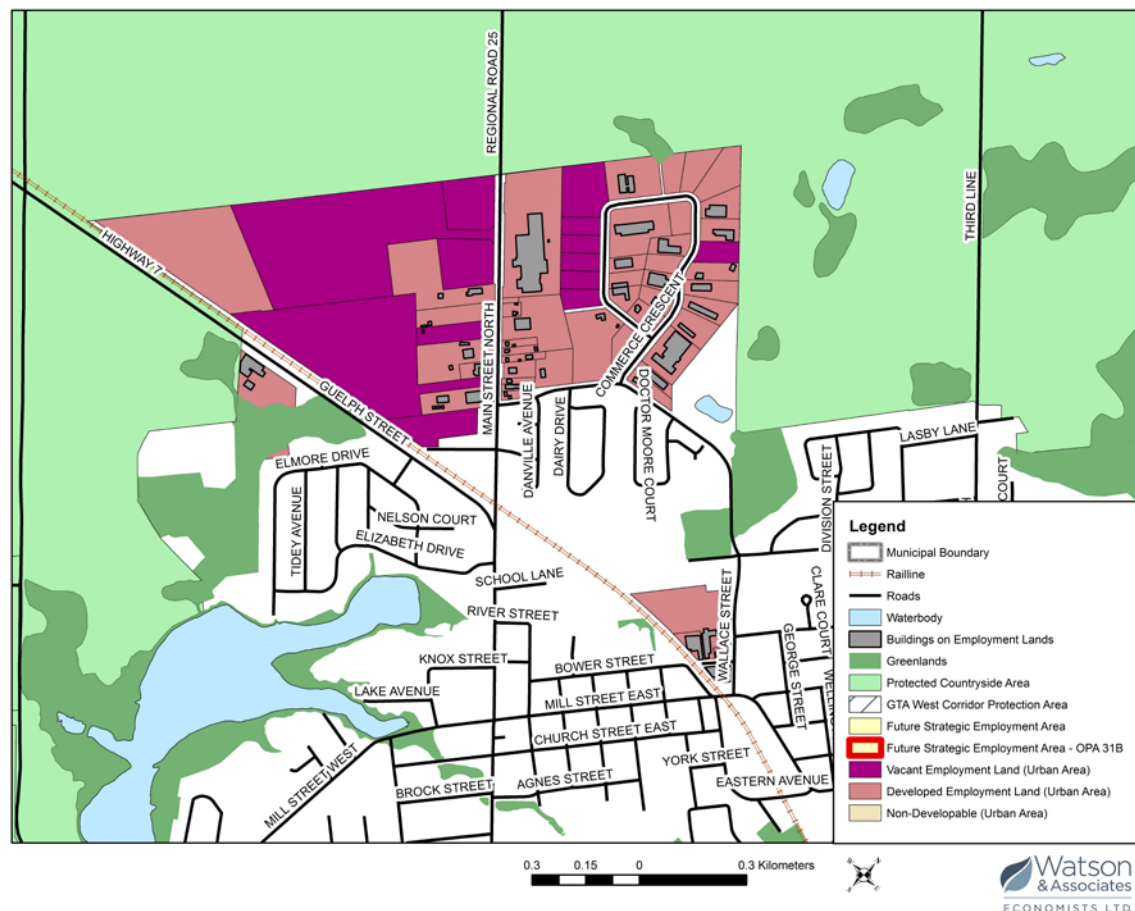




Figure 5-3b
Town of Halton Hills
Georgetown Industrial Area
Developed and Vacant Employment Lands

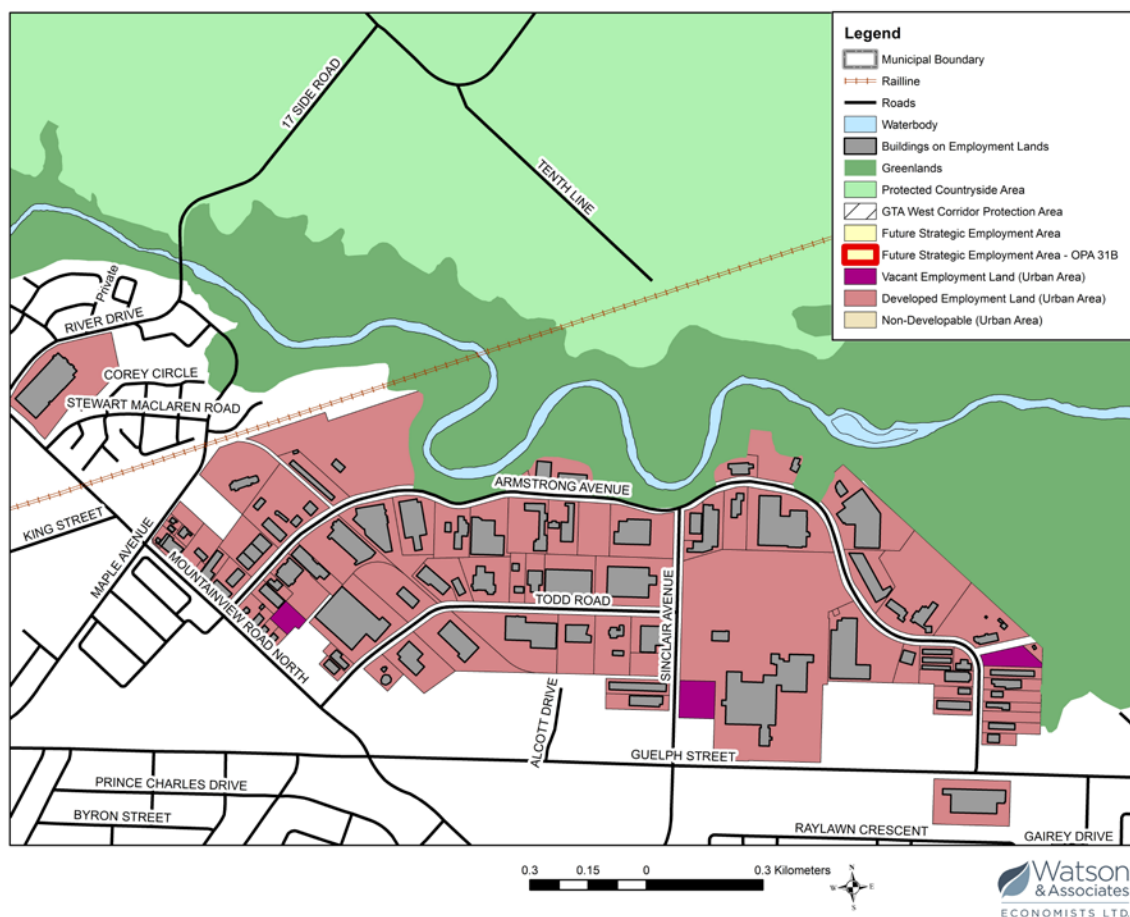




Figure 5-3c
Town of Halton Hills
Premier Gateway Employment Area
Developed and Vacant Employment Lands

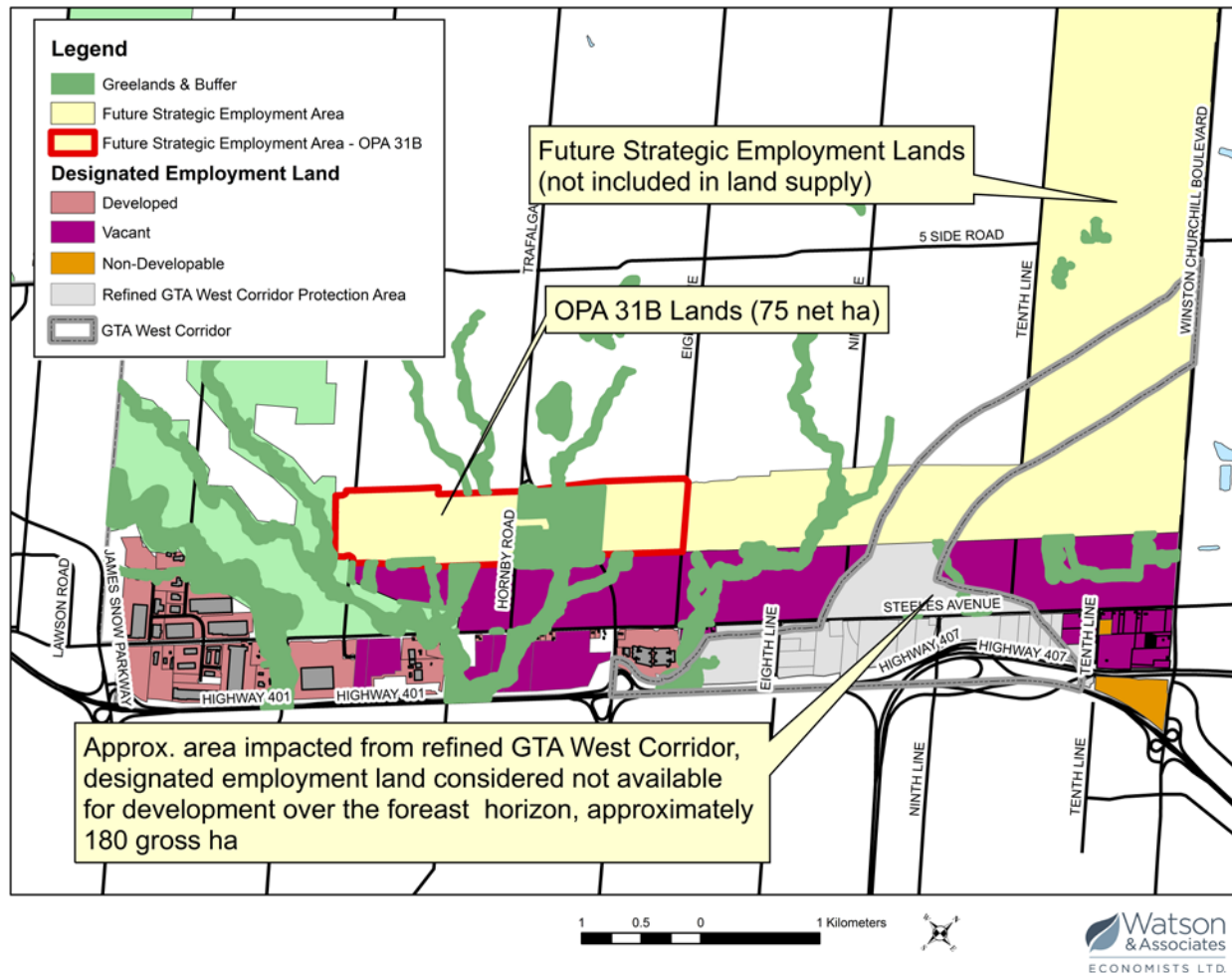
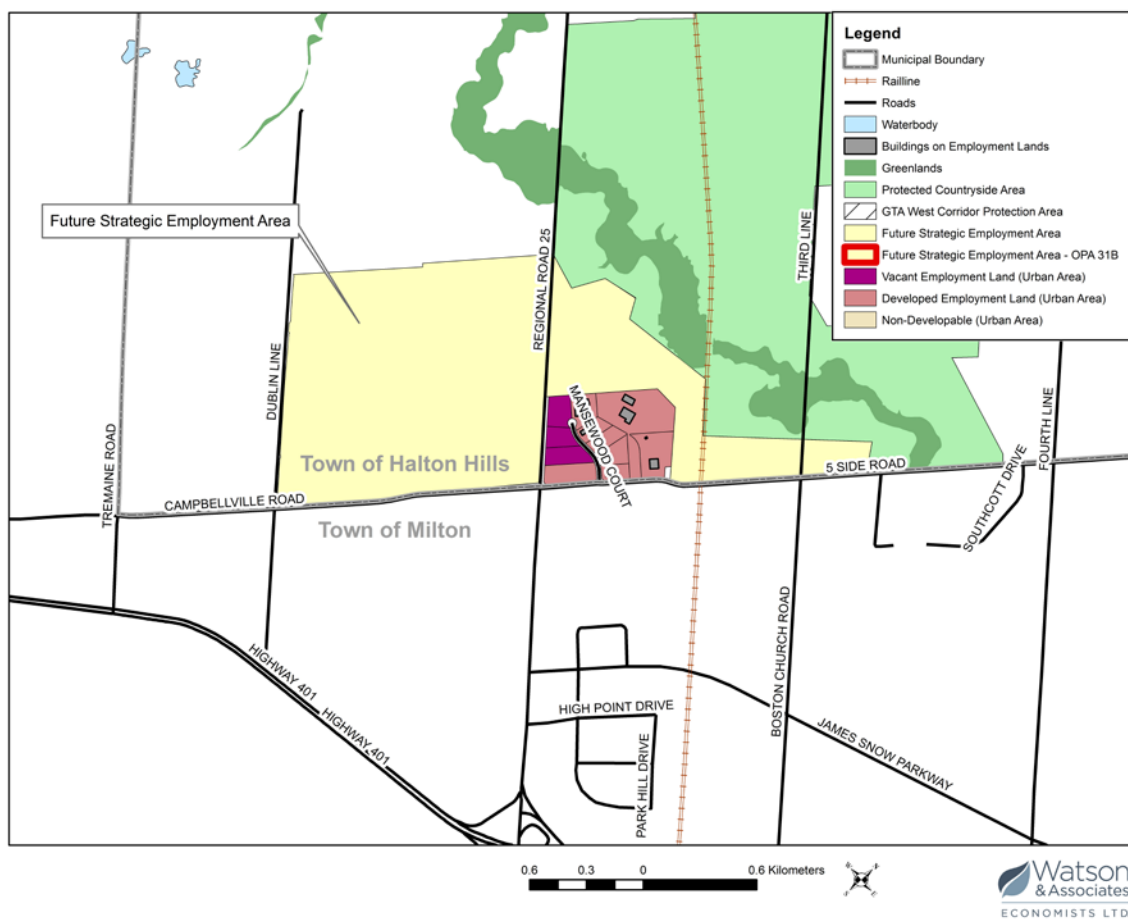




Figure 5-3d
Town of Halton Hills
Mansewood Industrial Area¹
Developed and Vacant Employment Lands



5.3 Intensification Potential on Employment Lands

Intensification on employment lands can take a number of forms, including further development of underutilized and partially vacant lots (infill), expansion (horizontal or vertical) of existing buildings and redevelopment of employment land parcels. Intensification offers the potential to accommodate future employment growth and achieve increased land utilization resulting in higher employment density in existing

¹ The Mansewood Industrial Area is a privately serviced industrial area.



Employment Areas. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g. roads, water/sewer servicing).

Through a desktop review, underutilized sites on employment lands which offer intensification potential over the long-term planning horizon (i.e. 2041) within the Town of Halton Hills have been identified. As part of this review, employment land sites with building coverages of 10% and less were reviewed and evaluated for intensification. It is noted that the average building coverage on employment lands in Halton Hills is 21%.¹ This evaluation includes a review of access to existing roads and the adequacy of road frontage to accommodate additional development. In addition to a review of sites based on building coverage, a review of large parcels (5 ha/12 acres and larger) with opportunity for additional development was also conducted.² Figure 5-5 summarizes the underutilized sites with potential for future intensification. As summarized in Figure 5-5, the redevelopment of the underutilized sites in Georgetown and Acton Industrial Areas could potentially accommodate up to 900 additional employees at an average density of 27 jobs/net ha (11 jobs/net acre). All of the underutilized sites identified are located in the Acton Industrial Area (12 sites, totalling 13 ha/32 acres) and the Georgetown Industrial Area (7 sites totalling 19 ha/47 acres), and the locations are illustrated in Figures 5-5a and 5-5b.

¹ Average building coverage ranges by Employment Area: Premier Gateway Employment Area – 24%; Georgetown Industrial Area – 23%; Acton Industrial Area – 15%; and Mansewood Industrial Area – 8%.

² A large parcel in the Georgetown Industrial Area was identified, the Saputo Manufacturing Site.



Figure 5-5
Town of Halton Hills
Georgetown and Acton Industrial Areas
Identification of Underutilized Employment Land Sites

Employment Area	Map Reference # ¹	Current Use	Road Frontage	Good Frontage/ Access to Road	Parcel Land Area, ha	Existing Building G.F.A. (sq.ft.)	Existing Building Coverage (%)	Target Employment Density (jobs/het ha)	Potential Employment Yield
Georgetown Industrial Area	G-1	Vehicle Parking Site	Armstrong Avenue	Yes	0.4	0	0%	32	13
	G-2	Dufferin Custom Concrete Site	Armstrong Avenue	Yes	2.0	16,000	7%	32	64
	G-3	School Bus Parking Lot	Mountainview Road	Yes	0.8	7,000	1%	32	25
	G-4	Lefreink Transfer Ltd./Lafarge Site	Armstrong Avenue	Yes	8.2	1,000	0%	32	261
	G-5	Vehicle Parking Site	Sinclair Avenue	Yes	0.6	0	0%	32	20
	G-6	Vehicle Parking Site	Armstrong Avenue	Yes	1.1	0	0%	32	36
	G-7	Vacant portion of the Saputo Manufacturing Site ²	Sinclair Avenue & Armstrong Avenue	Yes	6.2	0	0%	32	200
	Sub-Total				19.3	24,000	1%	32	619
Acton Industrial Area	A-1	Contractor's Yard	Main Street N.	Yes	1.1	3,000	2%	20	21
	A-2	Contractor's Yard	Main Street N.	Yes	3.1	9,000	9%	20	62
	A-3	Equipment Storage	Wallace Street	Yes	1.0	3,000	3%	20	20
	A-4	Equipment Storage	Wallace Street	Yes	2.4	4,000	2%	20	48
	A-5	Storage Facility (southern portion)	Wallace Street & Commerce Court	Yes	0.8	5,000	6%	20	16
	A-6	Concrete Manufacturing Site	Commerce Court	Yes	0.5	3,000	5%	20	10
	A-7	Vehicle Parking Site	Commerce Court	Yes	0.5	0	0%	20	9
	A-8	Building Materials Storage Site	Commerce Court	Yes	0.5	0	0%	20	11
	A-9	Truck & Equipment Storage Site	Commerce Court	Yes	0.6	0	0%	20	13
	A-10	Truck & Equipment Storage Site	Commerce Court	Yes	0.8	0	0%	20	16
	A-11	Truck & Equipment Storage Site	Commerce Court	Yes	1.2	0	0%	20	24
	A-12	Murtech Manufacturing Site	Commerce Court	Yes	0.7	6,000	8%	20	14
	Sub-Total				13.2	33,000	3%	20	265
Total					32.6	57,000	2%	27	884

Source: Based on a desktop review by Watson & Associates Economists Ltd., 2018.

¹. Refer to Figures 5-6a and 5-6b for map of site locations.

². Northern portion of the Saputo Manufacturing site with Frontage on Sinclair Avenue and Armstrong Avenue as identified on Figure 5-6b.



Figure 5-6a
Town of Halton Hills
Acton Industrial Area
Developed, Underutilized and Vacant Employment Lands

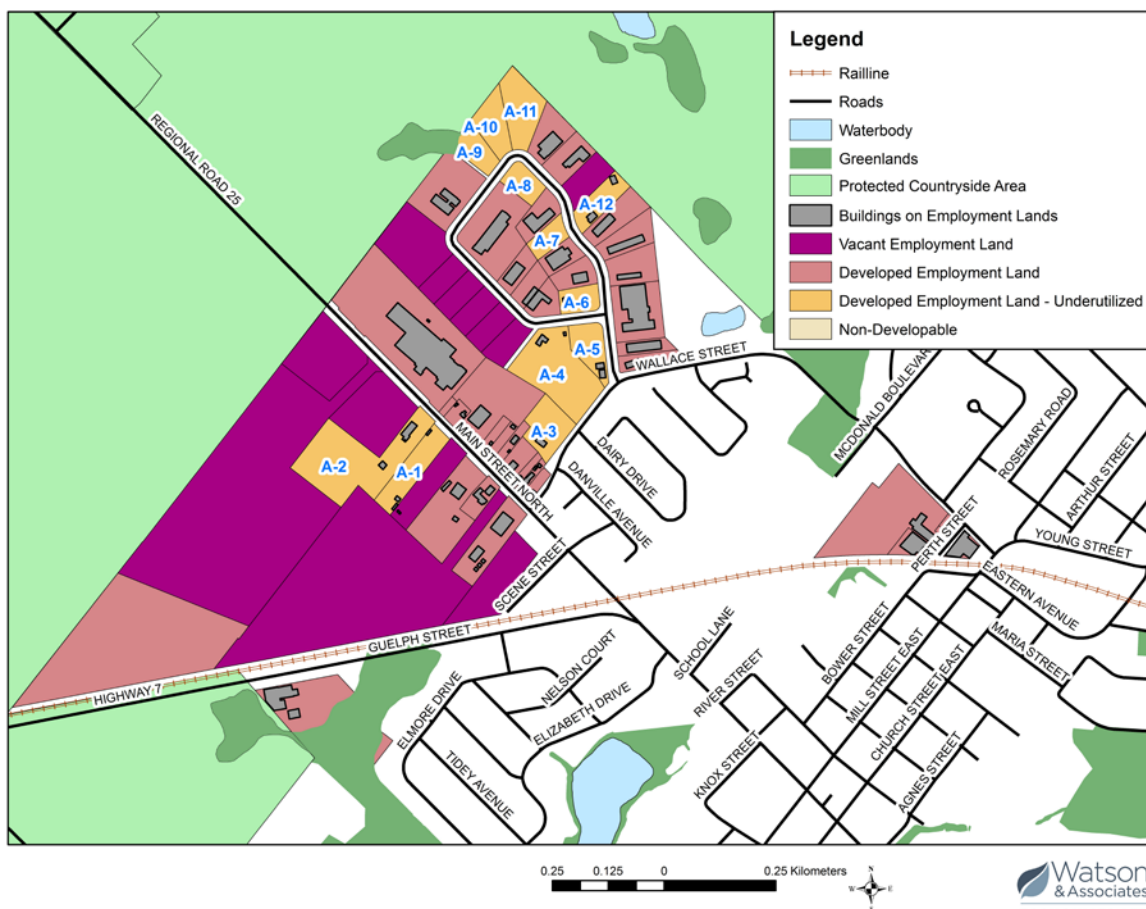
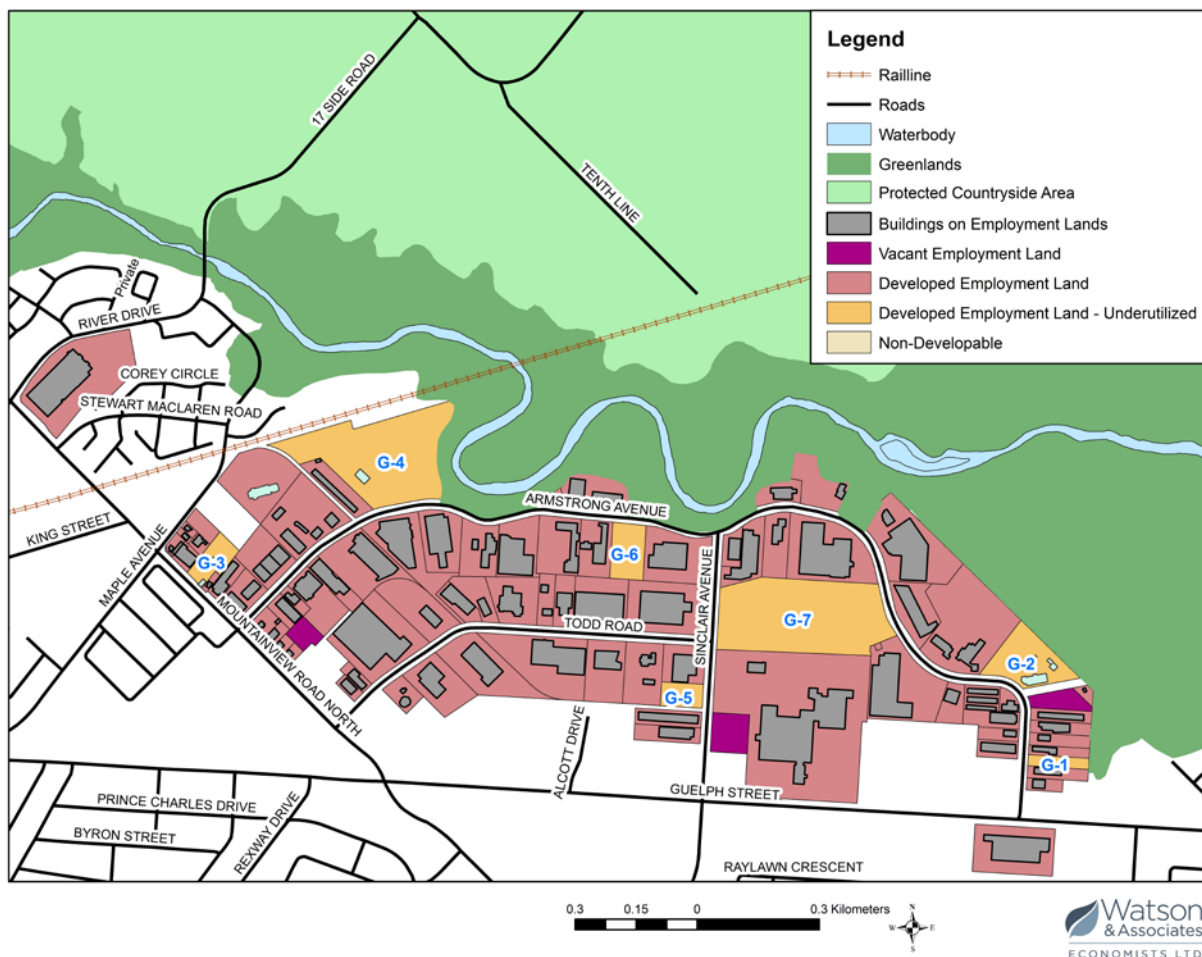




Figure 5-6b
Town of Halton Hills
Georgetown Industrial Area
Developed, Underutilized and Vacant Employment Lands





Chapter 6

Town of Halton Hills Forecast Employment Growth and Employment Land Needs



6. Town of Halton Hills Forecast Employment Growth and Employment Land Needs

6.1 Town of Halton Hills Long-Term Employment Forecast by Major Land-Use Category, 2019 to 2041

6.1.1 Town-Wide Employment Forecast, 2019 to 2041

A long-term employment forecast to 2041 by land-use category has been provided herein for the Town of Halton Hills. Also provided is a commentary with respect to key industry sub-sectors which are anticipated to drive market demand for non-residential lands over the 2019 to 2041 planning horizon.

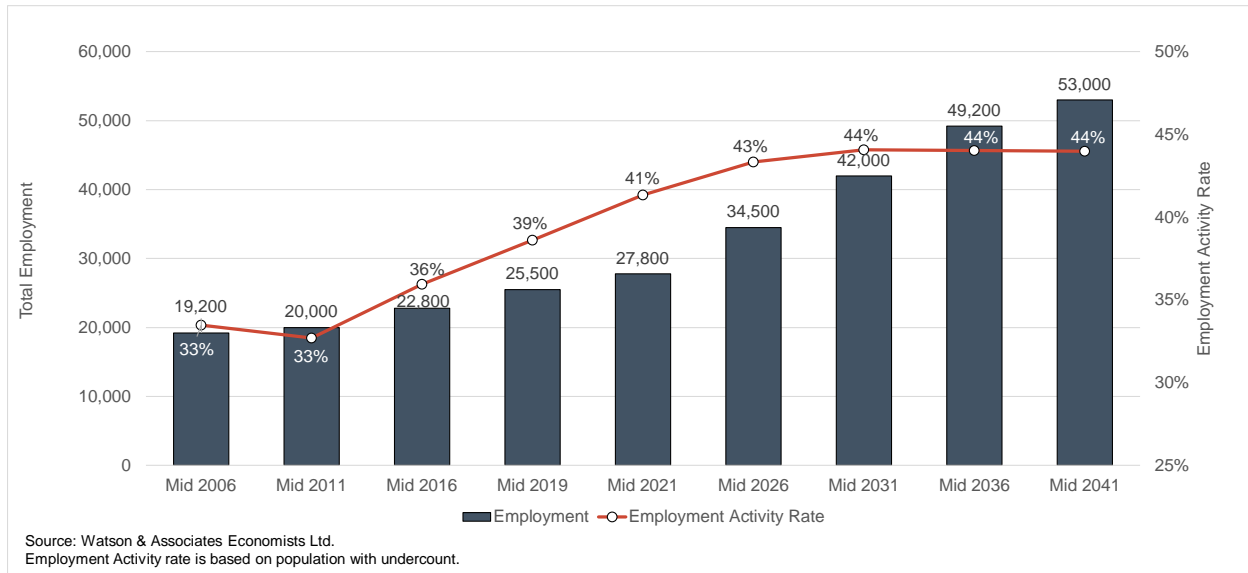
Figure 6-1 summarizes the long-term employment forecast for the Town of Halton Hills by total employment and employment activity rate¹ in comparison to recent historical trends. Key observations are provided below:

- By 2041, the Town's employment base is forecast to reach approximately 53,000. This represents an increase of approximately 27,500 jobs from 2019, or an annual employment growth rate of 3.4%.
- Since 2006, the Town of Halton Hills's employment activity rate (ratio of local employees to population) has increased from 33% to 39%. By 2031, the Town's employment activity rate is forecast to increase to 44%. During the post-2031 period, the Town's employment activity rate is forecast to stabilize largely due to the aging of the population and labour force base.

¹ Ratio of jobs to population.



Figure 6-1
Town of Halton Hills
Employment Forecast by Sector, 2019 to 2041



6.1.2 Town-Wide Employment Forecast by Employment Sector

The following provides an outlook of forecast employment trends by major employment sector and allocation of employment growth by sector and land-use type (Employment Area, rural area, population-related and major office).

6.1.2.1 Commercial/Population-Related Employment

- Commercial/population-related employment includes employment in institutional and commercial sectors not accommodated in major office buildings or within Employment Areas. This includes areas such as the downtown core, commercial corridors and nodes, neighbourhood plazas, institutional campuses and schools, and standalone institutional and retail buildings. This employment category generally serves the local population base by providing convenient locations to local residents. Typically, as the population grows, the demand for this employment also increases to serve the needs of the Town.

Existing Commercial/Population-Related Employment in Halton Hills

- Commercial/population-related employment in the Town of Halton Hills is primarily concentrated in the urban areas of Georgetown and Acton, representing



81% of the commercial/population-related employment in the Town. The urban areas of Georgetown and Acton include a wide-range of retail and service uses¹ that the population of the urban areas and the outlying rural area relies upon for its daily needs.

- The Toronto Premium Outlets complex, located in the Town's Premier Gateway Employment Area is a major retail destination for shoppers across the G.T.A. and beyond. The complex is unique within the context of the G.G.H., as it is one of only a few major retail complexes located outside a large urban centre. The Toronto Premium Outlets complex accounts for almost a third (29%) of the retail employment² within the Town of Halton Hills.



Toronto Premier Gateway Outlets,
Premier Gateway Employment Area.

- Commercial/population-related employment is also a component of the employment base within the Town's Employment Areas. Excluding the Toronto Premium Outlets complex,³ the Employment Areas include 12% of the Town's commercial/population-related employment and consisted of primarily small professional offices⁴ and commercial services (e.g. automotive repair, collision repair) that typically require larger lots than those found in the downtown cores and retail plaza sites. Employment-supportive commercial uses⁵ that support the local on-site employment and businesses within Employment Areas represent a very limited portion of the Town's existing employment base.

¹Such as retail stores and shopping centres, schools and daycares, health/medical care facilities and professional offices.

² Retail employment is based on the following NAICS codes: 44-45 Retail Trade and 72 Accommodation and Food Services.

³Including the Toronto Premium Outlets complex, approximately 19% of Commercial/population-related employment is located in the Town's Employment Areas.

⁴ Such as engineering offices, telecommunications operations and veterinarian offices.

⁵ Such as equipment rentals/sales, restaurants, daycares, hotels, convention centres and print shops.



Major Disruptors and Opportunities for Commercial/Population-Related Employment

- The Town's population is anticipated to increase by approximately 54,500 people between 2019 and 2041.¹ Forecast population growth in the Town of Halton Hills is anticipated to drive demand for future commercial/population-related employment in the Town's urban areas of Georgetown and Acton.
- Due to their proximity to the Town of Halton Hills, the Town of Milton and the Cities of Brampton and Mississauga are major competitive influences on the shopping patterns of local residents. The Heritage Heights Secondary Plan area (adjacent to the Municipal Boundary of Halton Hills and Brampton) within the City of Brampton is anticipated to provide the potential for additional retail space in the area.
- The rise of e-commerce has influenced the demand for retail square footage, in particular the demand for retail goods. While e-commerce has been capturing market share from goods-based retailers, growth in service-based retailers continues as they provide social experiences and other services that cannot be purchased remotely. Service-based retailers² typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-based retailers are driving the intensification of power centre and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers.
- Employment Areas within the Town of Halton Hills currently lack employment land supportive commercial uses. Employment supportive commercial uses are an important component in attracting a wide-range of employment land employment. Based on the findings of the Town of Halton Hills Supportive Commercial Needs Assessment Premier Gateway Phase 1B Employment Area,³

¹ Population forecast derived from Watson & Associates Economists Ltd.

² Service-based retailer refers to retail establishments that primarily provide an on-site service or where goods are consumed on-site, including food services (e.g. restaurants and bars), personal care services (e.g. hair salon), commercial recreational uses (e.g. fitness centres and movie theatres) and automotive services. Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores and G.A.F.O.

³ Prepared by Tate Economic Research, October 2016.



there is demand for between 7,700 sq.m. and 15,400 sq.m. (83,000 and 166,000 sq.ft.) of supportive commercial space, as well as demand for future hotel and convention space. This demand would support the Premier Gateway Employment Area of 279 net ha (689 net acres) that includes designated employment lands outside the G.T.A. West Corridor Protection Area and includes Future Strategic Employment Area lands subject to O.P.A. 31B.¹

- Commercial/population-related employment in the Town of Halton Hills is forecast to comprise 57% of the Town's employment growth to 2041. Further it is forecast that 84% of the commercial/population-related employment will be accommodated within the urban areas (Community Areas) and 16% will be accommodated on employment lands.²

6.1.2.2 Major Office Employment

- Major office employment is comprised of employment accommodated in office buildings greater than 1,900 sq.m (20,000 sq.ft.). Typically, major office employment includes the following sectors³ found in standalone multi-storey buildings:
 - finance and insurance;
 - information and cultural industries;
 - management of companies;
 - professional, scientific and technical services; and
 - real estate, rental and leasing sectors.
- It is important to note that not all office employment will be accommodated in major office buildings. It is anticipated that a portion of office employment will be accommodated in smaller-scale standalone office buildings (less than 1,900 sq.m (20,000 sq.ft.)), and mixed-use buildings throughout the Town, as well as multi-tenant commercial buildings on employment lands and in commercial areas.

¹ Employment land designated within the Premier Gateway Employment Area, excluding lands.

² Less than 1% of the Town's population-related employment is forecast to be accommodated in the rural areas.

³ NAICS codes 51, 52, 53, 54 and 55.



Existing Major Office Employment in Halton Hills

- Currently, the Town of Halton Hills does not have a major office base. Office employment is primarily concentrated in small office buildings in the urban areas of Georgetown and Acton. There is also a small component of office employment in multi-tenant industrial and small freestanding buildings within the Town's Employment Areas.

Major Disruptors and Opportunities for Major Office

- Access to public transportation, in particular high-order transit, is a key driver of major office employment. Currently, the Town of Halton Hills does not have public transit or connections to other transit systems (e.g. Cities of Brampton and Mississauga). The Town does offer GO Transit train service in the urban areas of Acton and Georgetown and bus service in Hornby (close proximity to the Premier Gateway Employment Area).¹ Competitively, the Town is at a disadvantage in this regard in attracting major office employment.
- It is anticipated that the westward expansion of the major office market in the City of Brampton² will provide opportunities for a new office sub-market in the western G.T.A. Further, as the western extent of the City of Brampton develops, expansions to the City of Brampton public transportation system may provide opportunities to strengthen regional public transit options in the area.
- Major office employment in the Town of Halton Hills is forecast to accommodate approximately 1,300 employees over the 2019 to 2041 period. This represents 5% of the Town's total employment growth over the 22-year forecast period. It is assumed that all major office employment will be accommodated on employment lands within the Premier Gateway Employment Area due to its proximity to 400-series highways and the growing labour market of the Regions of Halton and Peel.

6.1.2.3 Industrial Employment

- It is important to note that not all industrial employment within the Town of Halton Hills is located on employment lands. Approximately 96% of industrial

¹ GO Transit bus service is also provided at other locations within the Town.

² The City of Brampton has Secondary Plans for the Heritage Heights and Bram West areas that include plans for major office.



employment is on employment lands, while the remaining 4% is located in the rural areas.¹

- In terms of an employment breakdown by employment sector, employment lands in the Town of Halton Hills are comprised of 73% employment from the industrial sector, while the remaining 27% is comprised of employment in the commercial/population-related and institutional sectors.²

Existing Industrial Base in the Town of Halton Hills

Key components of the Town's industrial base are discussed below.

Manufacturing

- The Georgetown Industrial Area accommodates approximately 84% of the manufacturing employment within the Town of Halton Hills.
- While the Town experienced a modest gain over the 2011 to 2016 period in industrial employment (annual growth rate of 1.3%), the manufacturing sector in the Town of Halton Hills lost approximately 300 employees over the same period. Industrial employment growth within the Town of Halton Hills has largely consisted of employment growth in the Goods Movement sector (transportation, warehousing and logistics) and the construction sector.



Saputo Dairy Processing Facility, 279 Guelph St., Georgetown Industrial Area.

¹ Derived from data from the Halton Region Employment Survey, 2016.

² Excluding the Toronto Premium Outlets complex, the distribution of employment by sector on the Town's employment lands is more oriented towards employment in the industrial sector, comprising 86% of the employment lands employment. The rural area excludes the privately serviced Mansewood Industrial Area.



Goods Movement (Transportation, Warehousing and Logistics)

- The Goods Movement sector is accommodated in a range of industrial building typologies reflecting the diverse sub-sectors that comprise the sector. This includes distribution centres, warehouses, fulfillment centres, delivery depots, logistics hubs, corporate office buildings of major logistics companies, trucking terminals, multi-tenant warehouses and terminals, cold storage buildings and transportation yards.
- The Goods Movement sector (i.e. transportation/warehousing and wholesale trade) is an integral part of the G.G.H. and local economy. The Goods Movement sector represents approximately 18% of the current employment base in the Town of Halton Hills.¹



Distribution Centre
(59,500 sq.m./640,000 sq.ft.)
11400 Steeles Avenue,
Premier Gateway Employment Area.

Construction

- A large component of the construction sector is associated with employees that have no usual place of work (No Fixed Place of Work). Construction sub-sectors involved in large-scale construction projects typically require land to store equipment and machinery in proximity to major roads and highways. More specialized construction firms may require offices and facilities. Employment in this sector may include a wide-range of job types, including labourers, trades persons and engineers.
- The Town has a relatively high concentration of employees in the construction sector. Over the forecast period, a portion of industrial employment growth is anticipated to be generated from construction employment, driven by both residential and non-residential development activity within the Town and the surrounding area. This includes employment associated with construction of buildings, heavy and civil engineering construction and speciality trade contractors.

¹ Based on data 2016 Census – NAICS codes: 41-Wholesale trade and 48-49 Transportation and warehousing.



Major Disruptors and Opportunities for Industrial Employment

Goods Movement (Transportation, Warehousing and Logistics)

- Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. Demand in the Goods Movement sector is anticipated to continue across the G.G.H., particularly in locations where available employment lands have strong connectivity to regional transportation infrastructure (i.e. intermodal facilities and 400-series highway access). Rising industrial land prices and diminishing employment land supply, however, continue to shift development pressure for mid- to large-scale, land-extensive industrial uses from large, mature G.T.H.A. municipalities, to other competitively priced Ontario markets, such as Halton Hills, which offer ample market choice and support regional infrastructure to accommodate near-term demand and future expansion requirements. As previously mentioned in Chapter 4, Halton Hills ranks favourably against its regional competitors in terms of development cost competitiveness in the logistics sector.
- Several factors have been changing the nature of the Goods Movement industry over recent years, including just-in-time manufacturing, e-commerce and globalization. It is expected that the industry will continue to evolve and, in the near-term, the following trends are expected in Canada:
 - Just-in-time manufacturing will continue to be the industry norm, placing increasing emphasis on more frequent and smaller deliveries by truck transport;
 - Automation of distribution centres allows for more vertical storage; however, the need for numerous loading bays will dictate land requirements, and the industry trend is for more and more bays at facilities;
 - Larger facilities are a continuing trend versus smaller properties; typically, the larger the property, the lower the average employment density;
 - Locations close to multi-modal facilities continue to be very attractive with access to rail – this is generating increased demand for larger-scale logistics hubs. Intermodal hubs typically require approximately 200 to 300



ha (494 to 741 acres) for intermodal infrastructure and loading/unloading areas. Express terminals are smaller (<100 ha/247 acres);

- The increasing growth in e-commerce is anticipated to have a significant impact on employment growth and land demand related to the logistics sector. E-commerce sales in Canada have grown at a rate that is five times the pace of overall growth in retail trade and it is estimated that current online sales account for 6% of total Canadian retail spending. By comparison, U.S. online sales account for 9% of total spending.¹ Delivery expectations within this sector are increasing on an annual basis. As delivery times decrease, it is anticipated that demand for regional fulfilment centres will increase; and
- Reverse logistics – approximately 25% to 30% of online merchandise is returned, which is generating increasing needs for dedicated return centres.
- The majority of available vacant employment lands within the Town of Halton Hills is located in the Premier Gateway Employment Area. The Premier Gateway Employment Area offers strong access and connectivity to Highway 401 and close proximity to other 400-series highways, which facilitates trade regionally within the G.T.H.A. market as well as with southern Ontario markets.
- Due to restrictions on open storage in the Premier Gateway Employment Area, the Acton Industrial Area and the Mansewood Industrial Area will provide opportunities to accommodate Goods Movement sector uses requiring open storage. It is assumed that these industrial areas will continue to provide opportunities for general industrial developments.

Construction

- As previously discussed, the construction sector has been a key component of industrial employment growth for the Town of Halton Hills.
- The Town offers a wide range of location options to support the construction sector. The Premier Gateway Employment Area provides opportunities for more prestigious construction uses,² while the Acton and Mansewood Industrial Areas

¹ Purolator Logistics. Adapting your Canadian Supply Chain for E-commerce Efficiency. 2015.

² Uses requiring an office component, exposure and access to highway and no open storage requirements.



provide opportunities for a wider-range of construction uses, including opportunities for open storage. The rural area and employment not associated with a workplace (No Fixed Place of Work) are also anticipated to accommodate a share of the construction employment growth.

6.1.2.4 Employment Sectors Influencing the Planning of Employment Areas in Halton Hills

- Employment lands in Halton Hills provide opportunities to accommodate a wide-variety of employment sectors and businesses within a range of building types and forms. The following provides a summary of key characteristics of established and emerging employment sectors across the Town of Halton Hills.
 - Established employment sectors in Halton Hills include a wide-range of construction, Goods Movement, manufacturing uses and business services uses:
 - The established manufacturing sector in Halton Hills primarily consists of the manufacturing of food, beverage, consumer goods, metal and building materials products. These manufacturing uses are primarily concentrated in the Georgetown Industrial Area and operate in small to large single-tenant and multi-tenant buildings. Compared to other industrial uses on employment lands, employment density and building coverage is high. It is anticipated that these uses will experience modest growth primarily through expansions.
 - Construction uses are a large component of the Town's No Fixed Place of Work employment base. Established construction uses in the Town primarily consist of construction laydown yards with open storage and are concentrated in the Acton and Mansewood Industrial Areas. It is anticipated that due to the strong residential and non-residential growth in the local and surrounding area, existing and new construction businesses will continue to drive future employment growth for the Town.
 - The Goods Movement sector includes a range and scale of operations. Established Goods Movement uses in Halton Hills consist of wholesale distribution centres, freight/trucking terminals, multi-tenant distribution centres and transportation direct laydown yards. These uses are land extensive and require access or close



proximity to a 400-series highway. In Halton Hills, these uses are primarily concentrated in the Premier Gateway Employment Area, while some uses requiring open storage are located in the Acton and Mansewood Industrial Areas.

- Small operations of business services, while representing a small portion of the employment land employment, are primarily located in multi-tenant industrial buildings in the Georgetown Industrial Area.
- According to municipality officials with the Town's Economic Development, Innovation and Cultural Department there has been some interest expressed by the development community in regards to opportunities to accommodate smaller industrial buildings.
- There are number of emerging employment sectors that are anticipated to influence the demand for employment lands in Halton Hills across a wide range of uses:
 - As previously mentioned, the Goods Movement sector is evolving and responding to consumer demands, as e-commerce is growing in Canada. Emerging Goods Movement uses in Halton Hills are anticipated to include warehousing facilities requiring specialized functions which focus on serving the expanding urban population within the local and surrounding area. Key requirements include improvements to accessibility to the labour force (public transportation) and buildings with a range of design options.
 - Advanced manufacturing is evolving and is requiring integrated operations on larger sites in a "campus-style" setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics, and on-site manufacturing.
 - The knowledge-based economy in the G.T.H.A. is driving the demand for research and development facilities requiring large 1-storey and multi-storey facilities (major office) to operate.
 - Flex office space has become a major trend across many markets in Canada for business services. Flex office space allows occupants flexibility in the use and allocation of space according to operation needs. Tenants of flex office space may include



businesses that require a blend of office and industrial site characteristics.

- Employment land supportive commercial uses typically include accommodation and food services and commercial services. These uses are key amenities in attracting businesses and employment in industrial and office sectors.
- Figure 6-2 provides a summary of key established and emerging sectors by Employment Area within the Town of Halton Hills. Further details are provided in Appendix D.



Figure 6-2
Potential Target Uses on Employment Lands by Employment Area¹

Employment Area	Growing and Established Uses	Emerging Uses
Acton Industrial Area	<ul style="list-style-type: none"> • Transportation and construction laydown yards • Small industrial shops (e.g. electrician, plumber) • Metal product fabrication facilities • Building materials fabrication facilities • Recycled products recovery facilities 	<ul style="list-style-type: none"> • Bio-products manufacturing operations
Georgetown Industrial Area	<ul style="list-style-type: none"> • Small industrial shops (e.g. electrician, plumber) • Food and beverage processing factories • Consumer goods manufacturing factories • Metal product fabrication facilities • Building materials fabrication facilities • Small professional, scientific and technical offices 	<ul style="list-style-type: none"> • Advanced manufacturing operations
Premier Gateway Employment Area	<ul style="list-style-type: none"> • Wholesale/retail distribution centres • Freight/trucking terminals • Multi-tenant distribution centre facilities 	<ul style="list-style-type: none"> • Cold storage facilities • Wholesale facilities with large office • E-commerce fulfillment centres • Specialized construction branches • Advanced manufacturing operations • Corporate Offices • Food and accommodation services • Commercial services
Mansewood Industrial Area	<ul style="list-style-type: none"> • Transportation and construction laydown yards • Freight/trucking terminals • Recycled products recovery facilities 	<ul style="list-style-type: none"> • Bio-products manufacturing operations

¹ Refer to Appendix D for general locational requirements and development/built-form characteristics.



6.2 Employment Land Needs Analysis

6.2.1 Employment Lands Growth Forecast

As summarized in Figure 6-3, Employment Areas in the Town of Halton Hills are forecast to accommodate approximately 13,850 employees over the 2019 to 2041 period.¹ This represents approximately 50% of the Town's total employment growth over that period. It is assumed that 95% of Town-wide industrial employment growth will occur on employment lands, while 22% of the Town's commercial/population-related and major office employment will be accommodated on employment lands.²

Figure 6-3
Town of Halton Hills
Employment Growth Distribution by Location, 2019 to 2041

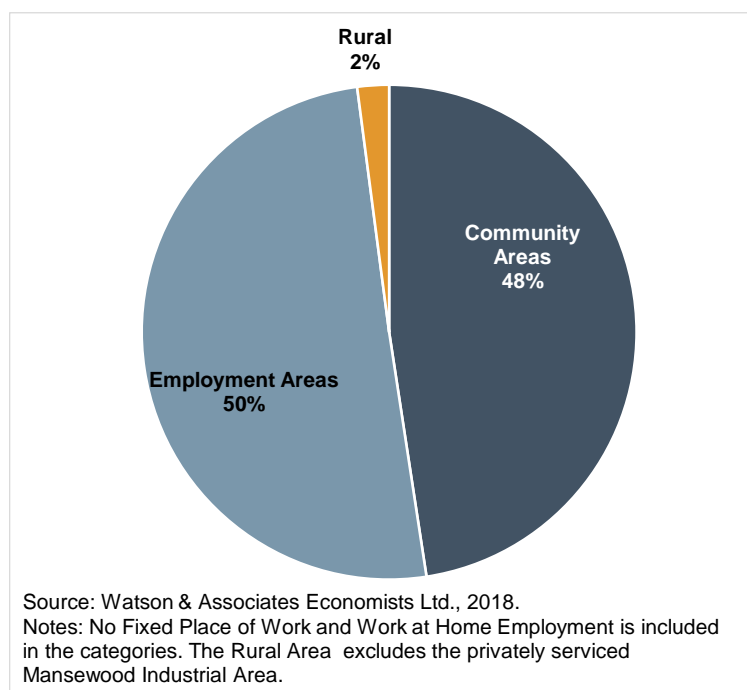


Figure 6-4 summarizes the employment forecast by sector and location from 2019 to 2041 (Appendix E provides further details in five-year increments from 2019 to 2041).

¹ Including major office employment located on employment lands. Excluding major office, employment lands are forecast to accommodate 12,480 employees, representing 45% of employment growth to 2041.

² It is assumed that all of the major office employment will occur on employment lands.



As summarized, employment on employment lands is forecast to increase from 10,200 in 2019 to 24,080 (22,760 excluding major office employment) by 2041, an increase of 13,850 employees, or 630 employees annually. This represents 50% of total employment growth between 2019 and 2041. Excluding major office, employment lands are anticipated to accommodate approximately 12,480 employees between 2019 and 2041. Employment lands are anticipated to accommodate 100% of the Town's major office employment growth to 2041.

Figure 6-4
Town of Halton Hills
Employment Growth by Sector and Location, 2019 to 2041

Employment Sector	Employment Growth, 2019-2041				Percent of Town Employment Growth on Employment Lands (2019-2041)
	Town-Wide	Employment Areas ¹	Rural-Based	Community Areas ²	
Primary	0	0	0	0	0%
Industrial	10,583	10,072	511	0	95%
Commercial/Population-Related	15,632	2,483	58	13,091	16%
Major Office	1,295	1,295	0	0	100%
Total Employment Growth	27,510	13,850	569	13,091	50%
Employment Areas Excluding Major Office & Major Office NFPOW		12,484			45%

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

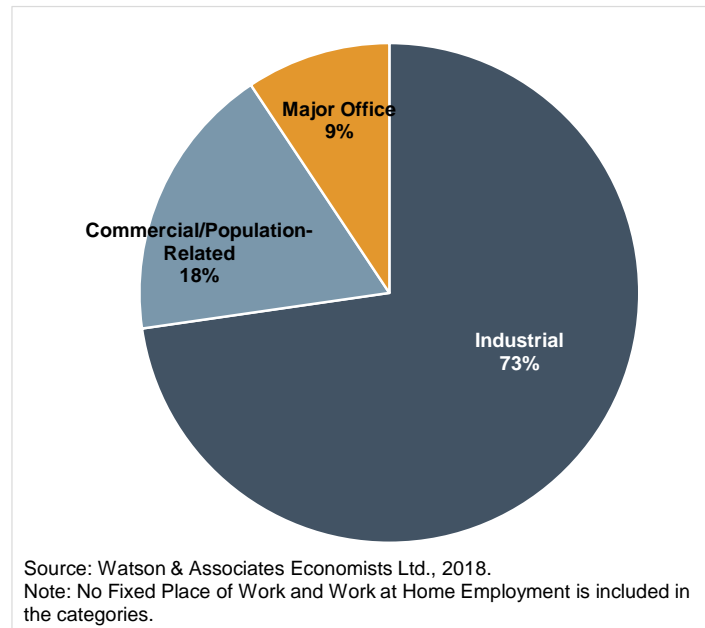
2. Excludes Town Designated Employment Areas.

Note: Work at Home and No Fixed Place of Work is included in the Rural-Based, Industrial, Commercial/Population-Related and Major Office categories.

Figure 6-5 summarizes the share of forecast employment growth on employment lands by sector between 2019 and 2041. While the industrial sector represents the majority of forecast employment growth, commercial/population-related employment accommodated in retail and office buildings is anticipated to comprise 27% of total employment growth on employment lands.



Figure 6-5
Town of Halton Hills
Forecast Employment Growth
on Employment Lands by Employment Sector, 2019 to 2041



6.2.2 Employment Land Density

Figure 6-6 provides a summary of the existing employment densities on designated employment lands by the Town's four Employment Areas categorized by "Built Employment Areas" and "Newly Developing Employment Areas." Also included are estimates on employment density that include and exclude the Toronto Premium Outlets site. Employment land densities range from 9 jobs/net ha (4 jobs/net acre) in the Premier Gateway Employment Area (excluding the Toronto Premium Outlets site) to 40 jobs/net ha (16 jobs/net acre) in the Georgetown Industrial Area. Overall the Town's average employment land density is 26 jobs/net ha (10 jobs/net acre) or 21 jobs/net ha (9 jobs/net acre) excluding the Toronto Premium Outlets site.¹ It is important to note that employment density in the Town's Premier Gateway Employment Area, a Newly Developing Employment Area, is lower than the employment density in the Town's more established employment areas.

¹Employment data is based on the 2016 Halton Region Employment Survey and various data sources (e.g. press releases). Figure 6-6 provides a summary of gross and net land area density.



Figure 6-6
Town of Halton Hills
Estimated Existing Employment Land Density (jobs/hectare)
by Employment Area

Designated Employment Areas	Developed Land Area, Ha		Estimated Employment ³	Employment Density (jobs/ha)	
	Gross ¹	Net ²		Gross	Net
Built Employment Areas					
Acton Industrial Area	80	71	1,530	19	22
Georgetown Industrial Area	125	117	4,670	37	40
Mansewood Industrial Area	29	24	290	10	12
Total Built Employment Area	234	212	6,490	28	31
Newly Developing Employment Areas					
Premier Gateway Employment Area	233	183	3,720	16	20
Toronto Premium Outlets		18	2,190		120
Excluding Toronto Premium Outlets		165	1,530		9
Total Newly Developing Employment Area	233	183	3,720	16	20
Town-Wide					
Total	467	395	10,210	22	26
Total, Excluding Toronto Premium Outlets		377	8,020		21

Source: Watson & Associates Economists. Derived from various sources including GIS data obtained from the Town of Halton Region, the Halton Region Employment Survey and development activity on recently absorbed parcels.

1. Gross density excludes environmental features, electricity transmission lines, freeways, as defined by and mapped as part of the Ontario Road Network; and cemeteries.

2. Net density based on parcel fabric. Non-developable parcels are excluded, internal infrastructure such as stormwater retention ponds and parkland area excluded.

3. Based on an employment estimate as of Mid-2019, including an estimate of employment on recently absorbed parcels as of Mid-Year 2018.

There are several macro-economic trends that are influencing average density levels on employment lands. Generally, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive warehousing and logistics facilities to support distribution and transportation of goods throughout the expanding urban population base.



The evolving form of industrial and non-industrial development on employment lands is also influencing average density levels on employment lands. Increasingly, major employers accommodated on employment lands are integrating industrial, office and training facilities on-site. These sites also provide significant land area to accommodate surface parking and, in some areas, future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than standalone major office developments.

On the other hand, growing demand within the multi-tenant and standalone office sector in the Town of Halton Hills is anticipated to have an upward influence on average employment densities on employment lands over the long term. Office employment on employment lands also generates demand for on-site and off-site employment amenities that also tend to have an upward influence on average employment density on employment lands.

Over the forecast period, it is anticipated that employment growth on employment lands over the 2019 to 2041 period will average 20 jobs/net ha (8 jobs/net acre). It is assumed that employment densities will be significantly higher than the existing employment density in the Premier Gateway Employment Area that excludes the Toronto Premium Outlets, but lower than the employment density in the Town's more established employment areas (in particular Georgetown and Acton). The Premier Gateway Employment Area is the Town's newest Employment Area and is anticipated to accommodate the majority of the Town's employment lands growth over the forecast horizon. Forecast average employment density levels on employment lands in the Premier Employment Area represent a significant increase relative to recent average employment density achieved for this area. This assumes the potential for a greater range of industrial and commercial sectors to be accommodated within the Premier Gateway Employment Area.

6.2.3 *Employment Land Demand, 2019 to 2041*

As summarized in Figure 6-7, approximately 7% of employment growth on employment lands will be accommodated through intensification, such as the expansion of existing buildings, additional development on already occupied parcels and infill on partially vacant lots. Adjusted for intensification, the Town is anticipated to require an additional 646 net ha (1,596 net acres) of employment lands to accommodate forecast demand of approximately 12,920 additional employees.



Figure 6-7
Town of Halton Hills
Forecast Employment Growth, 2019 to 2041

Growth Period	Total Employment on Employment Lands	Intensification on Employment Lands - 7% ¹	Total Employment on Employment Lands Adjusted for Intensification	Employment Density (jobs per net ha)	Total Employment Land Demand (ha)	Annual Employment Land Absorption (ha)
2019 - 2021	1,032	69	962	20	48	16
2019 - 2026	4,375	294	4,082	20	204	26
2019 - 2031	8,102	544	7,558	20	378	29
2019 - 2036	11,918	800	11,118	20	556	31
2019 - 2041	13,850	930	12,920	20	646	28

Source: Watson & Associates Economists Ltd., 2018.

1. Assumes 7% of employment will be accommodated through intensification.

6.2.4 Employment Land Demand by Employment Area, 2019 to 2041

Employment Growth

As summarized in Figure 6-8, 85% of forecast employment growth is to be accommodated on employment lands within the Premier Gateway Employment Area. The remainder of the employment growth is forecast to be accommodated within the Georgetown Industrial Area (6%), Acton Industrial Area (5%) and Mansewood Industrial Area (4%).

Employment Growth Accommodated Through Intensification

As previously discussed, the Acton Industrial and Georgetown Industrial Areas have the greatest opportunity for employment intensification. These areas respectively account for 86% and 14% of forecast employment growth on employment lands accommodated through intensification by 2041.

Employment Land Demand

Adjusted for intensification potential, employment land demand is largely concentrated in the Premier Gateway Employment Area, representing approximately 88% of the Town's employment land demand forecast.



Figure 6-8
Town of Halton Hills
Forecast Employment Growth and Land Demand by Employment Area, 2019 to 2041

Employment Growth on Employment Lands	Town-Wide	Premier Gateway Employment Area	Georgetown Industrial Area	Acton Industrial Area	Mansewood Industrial Area
Total Employment Growth	13,850	11,762	855	704	528
% of Town-Wide Employment Growth	100%	85%	6%	5%	4%
Employment Growth Accommodated Through Intensification	930	0	800	130	0
% of Town-Wide Intensification Growth	100%	0%	86%	14%	0%
Total Employment Growth Adjusted for Intensification	12,920	11,762	56	574	528
% of Town-Wide Employment Growth Adjusted for Intensification	100%	91%	0.4%	4%	4%
Employment Density (Jobs/Net ha)	20	21	35	20	12
Land Demand, Net ha	646	572	2	29	44
Annual Absorption	28	25	0.1	1	1.9
% of Town-Wide Land Demand	100%	88%	0%	4%	7%

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

6.2.5 Employment Land Needs, 2041

Figure 6-9 summarizes forecast serviced employment land needs to 2041. Key observations include the following:

- As discussed previously, within the 2019 to 2041 forecast period, the Town is anticipated to require an additional 646 net ha (1,596 net acres) of employment lands to accommodate forecast employment growth within these areas.
- As discussed in Chapter 5, the Town of Halton Hills has a vacant designated employment land supply of 376 net ha (929 net acres). As summarized in Figure 6-9, the demand for employment lands over the next 22 years exceeds the supply of vacant designated employment lands. It is forecast that, to accommodate forecast employment growth on employment lands to the year 2041, approximately 270 net ha (667 net acres) or 338 gross ha (835 gross acres) of additional designated employment lands will be required.
- This shortfall is largely due to forecast demand for the Premier Gateway Employment Area as summarized in Figure 6-10.



- It is recommended that the Town of Halton Hills continue to advance O.P.A. 31B which will bring approximately 75 net ha (185 net acres) of lands identified as Future Strategic Employment Area into the urban area as an Employment Area.
- Further, working with the Region of Halton, the Town should peruse adding additional Future Strategic Employment Area lands to the urban area of the Premier Gateway Employment Area.¹

Figure 6-9
Town of Halton Hills
Town-Wide Employment Land Need²

Employment Land Needs, 2019-2041		
Land Demand		
Employment Growth on Employment Lands Adjusted for Intensification	12,920	
Forecast Employment Land Density (Jobs/Net ha)	20	
Employment Land Demand, Net ha	646	
Land Supply	Net ha	
	376	
Employment Land Needs	Net ha	Gross ha
	-270	-338

¹ It is noted that the ultimate delineation of this Employment Area will be impacted by the outcome of the G.T.A. West Corridor. For the purposes of this study, an estimate has been derived for the refined G.T.A. West Corridor.

² Based on approximately 75 net hectares (185 net acres) within the O.P.A. 31B subject lands included in the land supply and an adjusted G.T.A. W.C.P.A. of approximately 180 gross ha (445 gross acres) that is considered non-developable by 2041. Further, employment land needs scenarios are provided in Appendix F.



Figure 6-10
Town of Halton Hills
Forecast Employment Need by Employment Area, 2019 to 2041

Employment Growth on Employment Lands	Town-Wide	Premier Gateway Employment Area	Georgetown Industrial Area	Acton Industrial Area	Mansewood Industrial Area
Total Employment Growth Adjusted for Intensification	12,920	11,762	56	574	528
% of Town-Wide Employment Growth Adjusted for Intensification	100%	91%	0.4%	4%	4%
Employment Density (Jobs/Net ha)	20	21	35	20	12
Land Demand, Net ha	646	572	2	29	44
Annual Absorption	28	25	0.1	1	1.9
% of Town-Wide Land Demand	100%	88%	0%	4%	7%
Land Supply, Net ha¹	376	335	2	34	5
Employment Land Needs, Net ha	-270	-236	0	5	-40

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

1. Includes O.P.A. 31B lands of approximately 75 ha and designated employment lands (excluding refined G.T.A. W.C.P.A. as noted in previous figures).



Appendix A

Detailed Profile of Employment Areas in Halton Hills



Appendix A: Detailed Profile of Employment Areas in Halton Hills

Acton Industrial Area

With a developed area of 71 net ha (175 net acres), the Acton Industrial Area is located in the urban settlement of Acton on the north side of Highway 7 in Halton Hills and is designated as a General Employment Area. This Employment Area offers rail access via a rail spur but lacks access/proximity to a 400-series highway. The Acton Industrial Area has some vacant employment lands available for development, which are marketable, largely for small to mid-sized industrial development, including manufacturing and construction sectors.

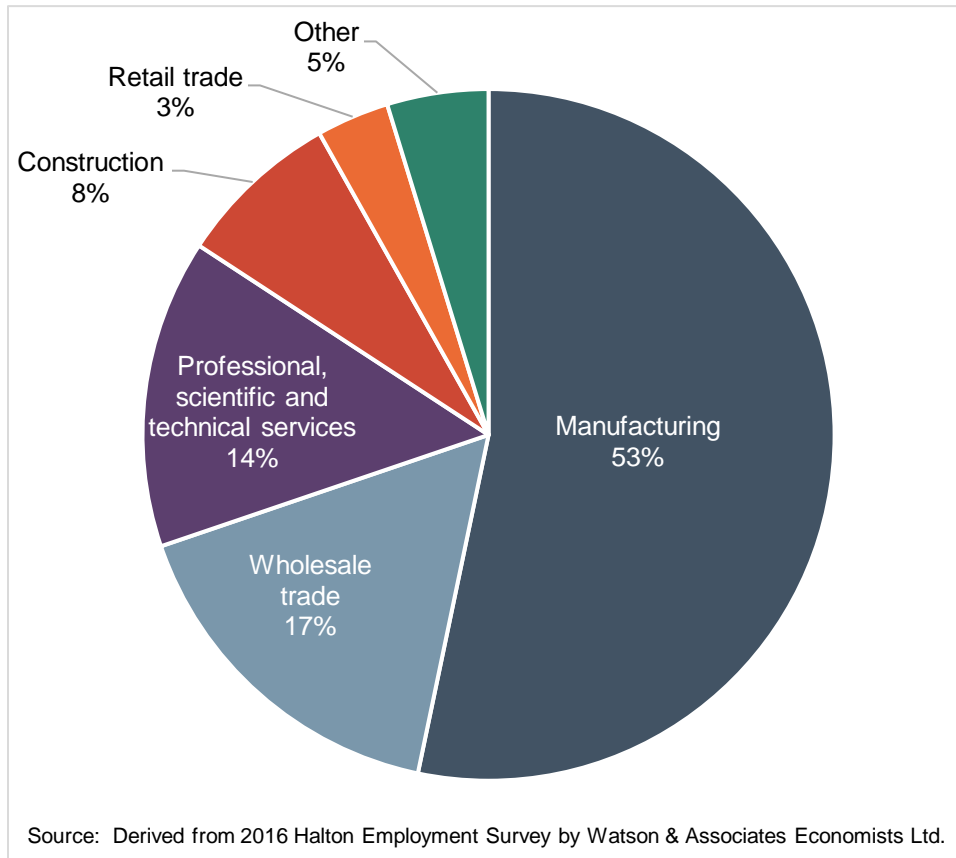
The Acton Industrial Area accommodates 1,530 jobs and 73 businesses and has a high concentration of small to mid-sized firms. Manufacturing is a dominant use, accounting for 53% of the employment in the industrial area, with wholesale trade and professional, scientific and technical services accounting for 17% and 14%, respectively (refer to Figure A-1).

Recent development activity within this area has been relatively minimal over the past decade. In 2016, however, a B.C. based real estate company, Futura Properties Ltd., purchased 22 ha (55 acres) of industrial land at 340 Main St. N. The newly acquired site will be developed into a high-quality industrial subdivision with lots ranging from 1 to 10 ha (2 to 25 acres). A tenant for an 8-ha (20-acre) site has been acquired and a building permit for a development totalling 13,900 sq.m (150,000 sq.ft.) was issued in 2018.

The existing employment density of the Acton Industrial Area is 22 jobs per net ha (9 jobs per net acre), which is below the average employment density for all Employment Areas in Halton Hills at 26 jobs per net ha (11 jobs per net acre).



Figure A-1
Town of Halton Hills
Acton Industrial Area – Share of Employment by Sector, 2016



Georgetown Industrial Area

Situated on the north side of Highway 7, the Georgetown Industrial Area is designated as a General Employment Area. The industrial area is well established and approaching buildout with a developed area of 117 net ha (289 net acres) and limited development opportunity available.

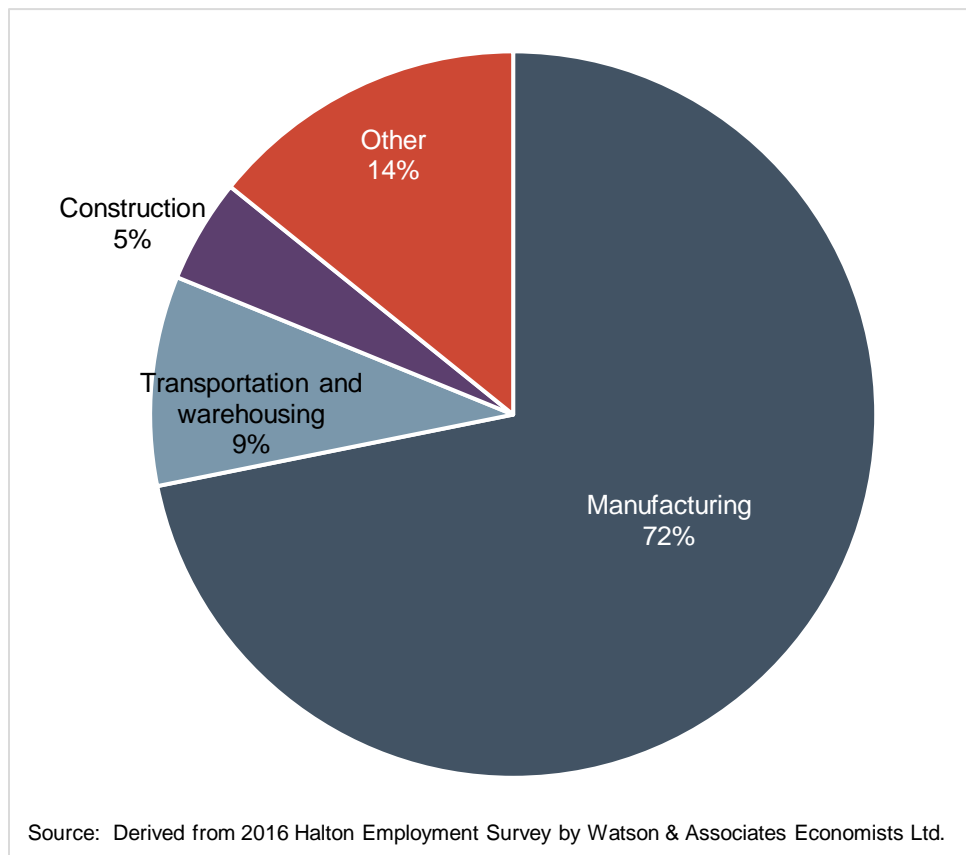
The park accommodates 4,670 jobs and 186 businesses and has the largest share of manufacturing employment among the business parks in Halton Hills, accounting for 84% of the Town's manufacturing employment base and 72% of the total employment base within the Georgetown Industrial Area.

Given the relatively limited opportunities for development on vacant lands, recent development in the Georgetown Industrial Area has been modest, accounting for



approximately 1% of the G.F.A. absorbed on employment lands within the Town over the past decade. The existing employment density of the Georgetown Industrial Area is 40 jobs per net ha (16 jobs per acre), which is the highest among the Employment Areas in Halton Hills.

Figure A-2
Town of Halton Hills
Georgetown Industrial Area – Share of Employment by Sector, 2016



Premier Gateway Employment Area

The Premier Gateway Employment Area is situated on the southern edge of Halton Hills along the north side of Highway 401, between James Snow Parkway (and the Town of Milton) in the west and the City of Mississauga to the east. It is an emerging Employment Area and the Town's largest Employment Area in terms of land area. The area offers excellent exposure to both Highways 401 and 407 and is geographically well-positioned along the Highway 401 corridor immediately west of Mississauga. The majority of the area is designated as Prestige Industrial Area, which allows for



freestanding office buildings, in addition to the Premier Gateway Area which allows for hotels and retail at major points of entry. The Employment Area offers significant vacant land (including large parcels) available for development at competitive land prices both in the short and longer term, with Phase 1 planned to accommodate employment growth to 2021 and Phase 2 for the 2021 to 2031 planning period.

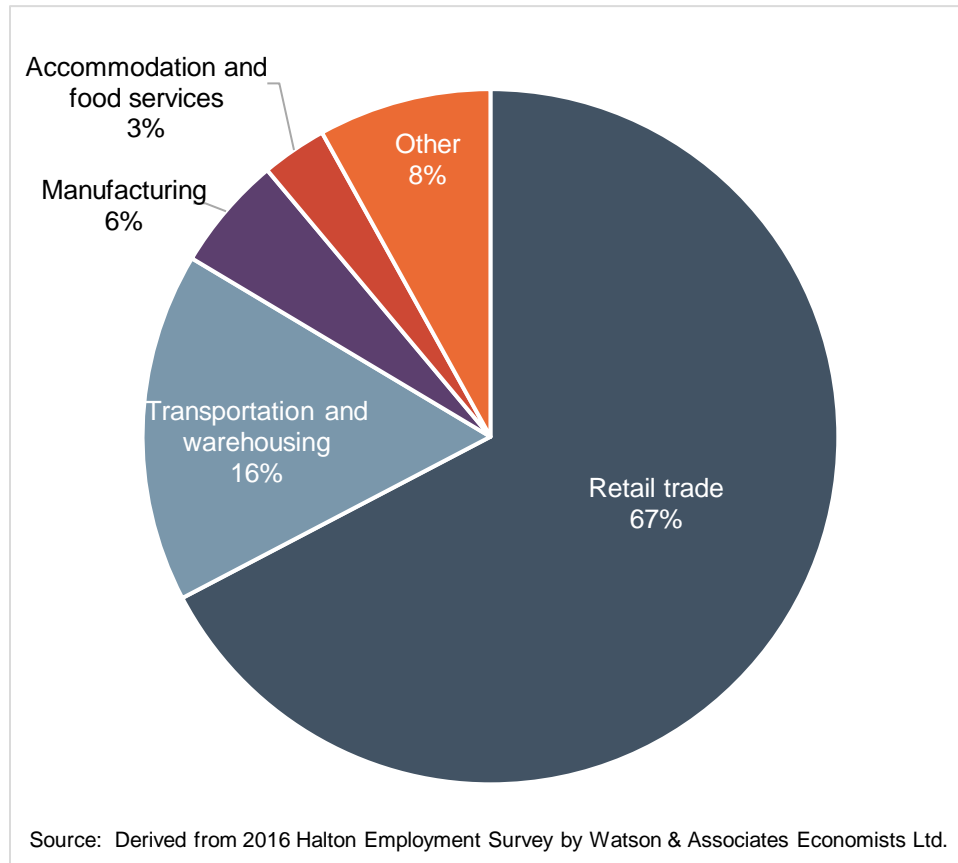
The Employment Area accommodates approximately 3,700 jobs and 147 businesses, with a large concentration in retail trade (the Toronto Premium Outlets mall) comprising approximately two-thirds of its employment base. Transportation, and warehousing and manufacturing round off the top three sectors in the area, with 16% and 5% of its employment base, respectively.

In terms of new development activity, the Premier Gateway Area accounted for the majority (98%) of the G.F.A. absorbed on the Town's employment lands from 2008-2017. Recent significant developments include the Toronto Premium Outlets mall expansion which is set to add 13,000 sq.m (140,000 sq.ft.) of additional retail space in November 2018, a 52,400 sq.m (564,300 sq.ft.) logistics facility on 6 Cleve Court built in 2017 and a 72,000 sq.m (774,600 sq.ft.) distribution facility at 7951 Fifth Line which has been built and leased to Kraft Heinz Canada Corporation in 2017.

The average existing employment density of the Premier Gateway Employment Area is 20 jobs per net ha (8 jobs per net acre) including the Toronto Premium Outlets mall; however, excluding the mall this area has the the lowest employment density among all Employment Areas within the Town at 9 jobs per ha (3 jobs per net acre).



Figure A-3
Town of Halton Hills
Premier Gateway Employment Area – Share of Employment by Sector, 2016

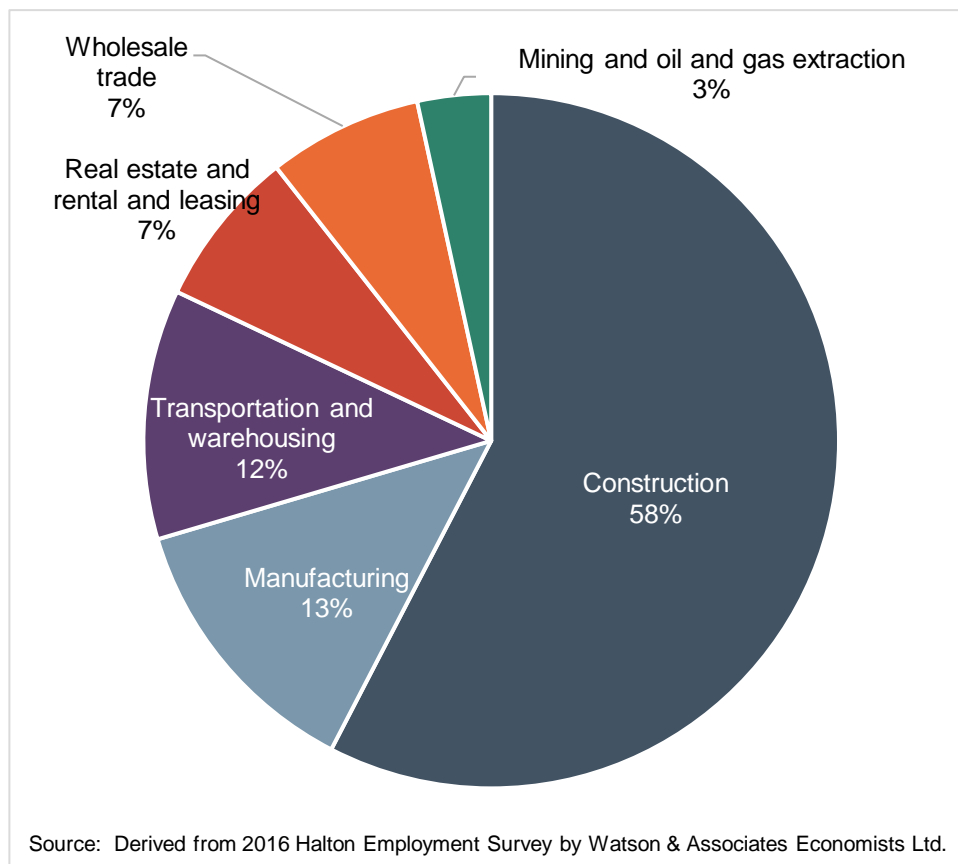


Mansewood Industrial Area

The Mansewood Industrial Area is a rural industrial subdivision located in Halton Hills on Regional Road 25 immediately north of the Milton 401 Industrial/Business Park. Mansewood is privately serviced and is the smallest Employment Area in Halton Hills, with a developed area of 24 net ha (59 net acres) accommodating 8 businesses and 585 jobs. The Employment Area is in proximity to Highway 401 and in close proximity to the Milton 401 Industrial/Business Park. The area has limited vacant land supply opportunities and the lack of municipal servicing limits development potential.



Figure A-4
Town of Halton Hills
Mansewood – Share of Employment by Sector, 2016





Appendix B

Provincially Significant Employment Zones – Zone 18

Proposed Provincially Significant Employment Zones for Consultation

Proposed Amendment 1 to the Growth Plan for the Greater Golden Horseshoe, 2017 (2019)



- Proposed PSEZ
- Municipally Designated Employment Area (2013)
- Municipal Boundary

Data Sources: Ministry of Municipal Affairs and Housing, Ministry of Natural Resources and Forestry.

Zone Name: 401 407 (Meadowvale)
Zone Number: 18
Upper- or Single-Tier Municipality: HALTON, PEEL





Appendix C

Competitive Assessment of Development Costs and Annualized Costs



Appendix C-1: Assessment of Total Development Costs/Annualized Cost

Industrial Building – 300,000 sq.ft.

Industrial Building - 300,000 sq.ft.

Building

300,000 square feet
18.12 acres (38 percent coverage)

Developer Profit

5%

Annualization Factor

6.5%

	Land Cost Per Acre ¹	Land Cost Per Sq.ft. of Building	Construction Cost Per Sq.ft. ²	Development Charges Per Sq.ft. ³	Developer Profit (5%) Per Sq.ft.	Total Dev't Cost Per Sq.ft.	Annualized Dev't Cost (6.5%) Per Sq.ft.	Tax Rate ⁴	Assessment Per Sq.ft.	Taxes Per Sq.ft.	Total Annualized Costs
	A	B A x 18.12 / 300000	C	D	E 5% of (B+C+D)	F B+C+D+E	G F x 6.5%	H		I F x H / 100	J G + I
GTA											
Halton Region											
Burlington	\$850,000	\$51.34	\$77.33	\$21.45	\$7.51	\$157.63	\$10.25	2.6126	\$136.00	\$3.55	\$13.80
Halton Hills	\$590,000	\$35.64	\$77.33	\$15.71	\$6.43	\$135.11	\$8.78	2.6451	\$93.00	\$2.46	\$11.24
Milton	\$1,000,000	\$60.40	\$77.33	\$17.27	\$7.75	\$162.75	\$10.58	2.3358	\$99.00	\$2.31	\$12.89
Oakville	\$900,000	\$54.36	\$77.33	\$17.95	\$7.48	\$157.12	\$10.21	2.4962	\$126.00	\$3.15	\$13.36
Peel Region											
Brampton	\$1,112,000	\$67.16	\$77.33	\$19.25	\$8.19	\$171.93	\$11.18	2.3624	\$97.00	\$2.29	\$13.47
Caledon	\$740,000	\$44.70	\$77.33	\$18.11	\$7.01	\$147.14	\$9.56	2.1554	\$86.00	\$1.85	\$11.42
Mississauga	\$1,155,000	\$69.76	\$77.33	\$25.07	\$8.61	\$180.77	\$11.75	2.1426	\$122.00	\$2.61	\$14.36
York Region											
Vaughan	\$1,162,000	\$70.18	\$77.33	\$29.45	\$8.85	\$185.81	\$12.08	1.9257	\$127.00	\$2.45	\$14.52
OUTSIDE GTA											
Cambridge	\$350,000	\$21.14	\$71.76	\$10.45	\$5.17	\$108.52	\$7.05	3.1080	\$80.00	\$2.49	\$9.54
Guelph	\$350,000	\$21.14	\$71.76	\$9.97	\$5.14	\$108.02	\$7.02	3.2976	\$111.00	\$3.66	\$10.68

Source: Watson & Associates Economists Ltd.

Notes:

¹ Land value based on mid-range of typical per acre cost for high quality serviced employment land appropriate for general industrial uses. Source: Cushman & Wakefield and Halton Region Economic Development.

² Construction costs and locational variation based on RSMeans construction cost data.

³ Reflects Lower/Single-Tier, Upper-Tier (where applicable) and Education development charges.

⁴ Reflects Lower/Single-Tier, Upper-Tier (where applicable) and Education taxes.



Appendix C-2: Assessment of Total Development Costs/Annualized Cost

Industrial Building – 750,000 sq.ft.

Industrial Building - 750,000 sq.ft.

Building 750,000 square feet
 Land 43.04 acres (40 percent coverage)
 Developer Profit 5%
 Annualization Factor 6.5%

	Land Cost Per Acre ¹	Land Cost Per Sq.ft. of Building ²	Construction Cost Per Sq.ft. ²	Development Charges Per Sq.ft. ³	Developer Profit (5%) Per Sq.ft.	Total Dev't Cost Per Sq.ft.	Annualized Dev't Cost (6.5%) Per Sq.ft.	Tax Rate ⁴	Assessment Per Sq.ft.	Taxes Per Sq.ft.	Total Annualized Costs
	A	B A x 43.04 / 750000	C	D	E 5% of (B+C+D)	F B+C+D+E	G F x 6.5%	H		I F x H / 100	J G + I
GTA											
Halton Region											
Burlington	\$850,000	\$48.78	\$71.81	\$21.45	\$7.10	\$149.14	\$9.69	2.6126	\$136.00	\$3.55	\$13.25
Halton Hills	\$590,000	\$33.86	\$71.81	\$15.71	\$6.07	\$127.45	\$8.28	2.6451	\$93.00	\$2.46	\$10.74
Milton	\$1,000,000	\$57.39	\$71.81	\$17.27	\$7.32	\$153.79	\$10.00	2.3358	\$99.00	\$2.31	\$12.31
Oakville	\$900,000	\$51.65	\$71.81	\$17.95	\$7.07	\$148.48	\$9.65	2.4962	\$126.00	\$3.15	\$12.80
Peel Region											
Brampton	\$1,112,000	\$63.81	\$71.81	\$19.25	\$7.74	\$162.61	\$10.57	2.3624	\$97.00	\$2.29	\$12.86
Caledon	\$740,000	\$42.47	\$71.81	\$18.11	\$6.62	\$139.00	\$9.04	2.1554	\$86.00	\$1.85	\$10.89
Mississauga	\$1,155,000	\$66.28	\$71.81	\$24.95	\$8.15	\$171.19	\$11.13	2.1426	\$122.00	\$2.61	\$13.74
York Region											
Vaughan	\$1,162,000	\$66.68	\$71.81	\$29.44	\$8.40	\$176.32	\$11.46	1.9257	\$127.00	\$2.45	\$13.91
OUTSIDE GTA											
Cambridge	\$350,000	\$20.09	\$66.63	\$10.45	\$4.86	\$102.03	\$6.63	3.1080	\$80.00	\$2.49	\$9.12
Guelph	\$350,000	\$20.09	\$66.63	\$9.97	\$4.83	\$101.53	\$6.60	3.2976	\$111.00	\$3.66	\$10.26

Source: Watson & Associates Economists Ltd.

Notes:

¹ Land value based on mid-range of typical per acre cost for high quality serviced employment land appropriate for general industrial uses. Source: Cushman & Wakefield and Halton Region Economic Development.

² Construction costs and locational variation based on RSMeans construction cost data.

³ Reflects Lower/Single-Tier, Upper-Tier (where applicable) and Education development charges.

⁴ Reflects Lower/Single-Tier, Upper-Tier (where applicable) and Education taxes.



Appendix C-3: Assessment of Total Development Costs/Annualized Cost

One-storey Flex Office Building – 150,000 sq.ft.

One-storey Flex Office Building - 150,000 sq.ft.

Building 150,000 square feet
 Land 11.48 acres (30 percent coverage)
 Developer Profit 5%
 Annualization Factor 6.5%

	Land Cost Per Acre ¹	Land Cost Per Sq.ft. of Building	Construction Cost Per Sq.ft. ²	Development Charges Per Sq.ft. ³	Developer Profit (5%) Per Sq.ft.	Total Dev't Cost Per Sq.ft.	Annualized Dev't Cost (6.5%) Per Sq.ft.	Tax Rate ⁴	Assessment Per Sq.ft.	Taxes Per Sq.ft.	Total Annualized Costs
	A	B A x 11.48 / 150000	C	D	E 5% of (B+C+D)	F B+C+D+E	G F x 6.5%	H		I F x H / 100	J G + I
GTA											
<i>Halton Region</i>											
Burlington	\$850,000	\$65.05	\$137.38	\$21.45	\$11.19	\$235.08	\$15.28	1.7779	\$234.00	\$4.16	\$19.44
Halton Hills	\$590,000	\$46.15	\$137.38	\$19.55	\$10.10	\$212.20	\$13.79	1.7980	\$250.00	\$4.50	\$18.29
Milton	\$1,000,000	\$76.53	\$137.38	\$17.27	\$11.56	\$242.75	\$15.78	1.6071	\$268.00	\$4.31	\$20.09
Oakville	\$900,000	\$68.88	\$137.38	\$17.95	\$11.21	\$235.42	\$15.30	1.7061	\$255.00	\$4.35	\$19.65
<i>Peel Region</i>											
Brampton	\$1,112,000	\$85.11	\$137.38	\$25.83	\$12.42	\$260.73	\$16.95	2.1415	\$283.00	\$6.06	\$23.01
Caledon	\$740,000	\$56.63	\$137.38	\$24.69	\$10.94	\$229.65	\$14.93	1.9156	\$202.00	\$3.87	\$18.80
Mississauga	\$1,155,000	\$88.40	\$137.38	\$34.16	\$13.00	\$272.94	\$17.74	1.9840	\$265.00	\$5.26	\$23.00
<i>York Region</i>											
Vaughan	\$1,162,000	\$88.93	\$137.38	\$36.74	\$13.15	\$276.20	\$17.95	1.6543	\$208.00	\$3.44	\$21.39
OUTSIDE GTA											
Cambridge	\$350,000	\$26.79	\$127.48	\$16.29	\$8.53	\$179.09	\$11.64	3.1080	\$125.00	\$3.89	\$15.53
Guelph	\$350,000	\$26.79	\$127.48	\$9.97	\$8.21	\$172.46	\$11.21	2.9323	\$125.00	\$3.67	\$14.87

Source: Watson & Associates Economists Ltd.

Notes:

¹ Land value based on mid-range of typical per acre cost for high quality serviced employment land appropriate for general industrial uses. Source: Cushman & Wakefield and Halton Region Economic Development.

² Construction costs and locational variation based on RSMeans construction cost data.

³ Reflects Lower/Single-Tier, Upper-Tier (where applicable) and Education development charges.

⁴ Reflects Lower/Single-Tier, Upper-Tier (where applicable) and Education taxes.



Appendix D

Target Sectors and Location Requirements



Appendix D: Target Sectors and Location Requirements

Figure D-1
Town of Halton Hills Target Sectors – Potential Location/Uses, General Locational Requirements
and Development/Built-Form Characteristics

Goods Movement Sector			
Potential Location/Uses in Halton Hills		General Locational Requirements	Development/Built-Form Characteristics
Growing and Established	<ul style="list-style-type: none"> Wholesale/retail distribution centres Employment Areas: Premier Gateway Freight/trucking terminals Employment Areas: Premier Gateway and Mansewood Multi-tenant distribution centre facilities Employment Areas: Premier Gateway Transportation laydown yards Employment Areas: Acton, Mansewood 	<ul style="list-style-type: none"> Prestige and general industrial Buffering of non-residential uses Direct access to major road and proximity to 400-series highway and other major transportation infrastructure, including rail Proximity to large customer base 	<ul style="list-style-type: none"> Low to moderate design quality 10,000 to 1,000,000 sq.ft. Ceiling heights 30 ft.+ 4 to 20 ha Large parcels with flat topography Expansion potential Low to high building coverage and low on-site employment density Loading/unloading areas Outdoor storage or enclosed vertical storage
Emerging	<ul style="list-style-type: none"> Cold storage facilities Employment Areas: Premier Gateway Wholesale facilities with large office component Employment Areas: Premier Gateway E-commerce fulfillment centres Employment Areas: Premier Gateway 	<ul style="list-style-type: none"> Prestige and general industrial Buffering of non-residential uses Direct access to major road and proximity to 400-series highway and other major transportation infrastructure, including rail Proximity to large customer base Access to large skilled and unskilled labour force Access to public transportation and regional commuter connections 	<ul style="list-style-type: none"> Same as above with greater emphasis on enclosed mezzanine storage and integrated office uses



Figure D-2

Town of Halton Hills Target Sectors – Potential Location/Uses, General Locational Requirements and Development/Built-Form Characteristics (Cont'd)

Construction, Maintenance and Repair			
Potential Location/Uses in Halton Hills		General Locational Requirements	Development/Built-Form Characteristics
Growing and Established	<ul style="list-style-type: none"> Construction laydown yards Employment Areas: Mansewood, Acton Small shops (e.g. electrician, plumber millwright shops) Employment Areas: Georgetown, Acton 	<ul style="list-style-type: none"> General industrial Buffering of non-residential uses 	<ul style="list-style-type: none"> Low design quality <1,000 sq.ft. to 10,000 sq.ft. <1 to 4 ha lots Multi-tenant buildings and small single-tenant buildings Low building coverage and low on-site employment density Loading/unloading area Outdoor storage for equipment
	<ul style="list-style-type: none"> Specialized construction branches requiring large office support centre Employment Areas: Premier Gateway 	<ul style="list-style-type: none"> Prestige and general industrial Buffering of non-residential uses Proximity to 400-series highway Access to large skilled labour force 	<ul style="list-style-type: none"> Moderate to high design quality 10,000 sq.ft. to 50,000 sq.ft. 1 to 4 ha lots Multi-tenant and industrial building with office component Moderate building coverage and on-site employment density Mezzanine storage



Figure D-3

Town of Halton Hills Target Sectors – Potential Location/Uses, General Locational Requirements and Development/Built-Form Characteristics (Cont'd)

Manufacturing			
Potential Location/Uses in Halton Hills		General Locational Requirements	Development/Built-Form Characteristics
Growing and Established	<ul style="list-style-type: none"> • Food and beverage processing factories Employment Areas: Georgetown, Acton 	<ul style="list-style-type: none"> • General industrial setting • Access to unskilled and skilled labour force • Proximity to large customer base • High power and water consumption • Competitive operating costs (e.g. utility, property taxes) 	<ul style="list-style-type: none"> • Low to high design quality • 10,000 to 250,000 sq.ft. • 1 to 4 ha lots • Expansion potential • High building coverage and on-site employment density • Range of building types, including small to large single-tenant buildings and multi-tenant buildings • Loading/unloading areas
	<ul style="list-style-type: none"> • Consumer goods manufacturing factories Employment Areas: Georgetown 		
	<ul style="list-style-type: none"> • Metal product fabrication facilities Employment Areas: Georgetown, Acton 		
	<ul style="list-style-type: none"> • Building materials fabrication facilities Employment Areas: Georgetown, Acton 		
	<ul style="list-style-type: none"> • Recycled products recovery operations Employment Areas: Acton, Mansewood 		
Emerging	<ul style="list-style-type: none"> • Bio-products manufacturing operations Employment Areas: Acton, Mansewood 	<ul style="list-style-type: none"> • Same as above; greater emphasis on prestige setting and skilled labour force, including training and education facilities in area 	<ul style="list-style-type: none"> • Advanced manufacturing – same as above; greater emphasis on integrated operations (logistics and office), landscaping and enclosed storage • Bio-products manufacturing operations same as above with a requirement for open storage
	<ul style="list-style-type: none"> • Advanced manufacturing operations Employment Areas: Georgetown, Premier Gateway 		



Figure D-4

Town of Halton Hills Target Sectors – Potential Location/Uses, General Locational Requirements and Development/Built-Form Characteristics (Cont'd)

Corporate Office/Business Services			
Potential Location/Uses in Halton Hills		General Locational Requirements	Development/Built-Form Characteristics
Growing and Established	<ul style="list-style-type: none">• Small professional, scientific and technical offices Employment Areas: Georgetown	<ul style="list-style-type: none">• Prestige and general industrial setting• Access to skilled labour force• Access to on-site and off-site amenities (e.g. fitness centres, parks, retail and service uses)	<ul style="list-style-type: none">• Low to high design quality• 2,000 to 10,000 sq.ft.• <1 to 2 ha lots• Storefront entrance for general public• High building coverage and on-site employment density• Small multi-tenant and flex office space• Street lighting
Emerging	<ul style="list-style-type: none">• Corporate Offices Employment Areas: Premier Gateway	<ul style="list-style-type: none">• Prestige industrial setting• Access to on-site and off-site amenities (e.g. fitness centres, parks, retail and service uses)• Proximity to 400-series highway• Access to large skilled labour force• Excellent public transportation with regional commuter connections	<ul style="list-style-type: none">• High design quality• 20,000 sq.ft.+• <2 ha lots• High building coverage and on-site employment density• Accommodate multiple storeys• Small to large multi-tenant, flex office space, campus-style facilities, 1-storey research and development facilities and free-standing major office (20,000 sq.ft.+)• Integrated logistics component• Street lighting



Figure D-5

Town of Halton Hills Target Sectors – Potential Location/Uses, General Locational Requirements and Development/Built-Form Characteristics (Cont'd)

Employment Land Supportive Commercial Uses		
Potential Location/Uses in Halton Hills	General Locational Requirements	Development/Built-Form Characteristics
Emerging <ul style="list-style-type: none"> • Food and accommodation services Employment Areas: Premier Gateway • Commercial services Employment Areas: Premier Gateway 	<ul style="list-style-type: none"> • Prestige and general industrial setting • Surrounding a large employment base • High traffic exposure from major road and surrounding employment and commercial uses • Clustering of retail uses in a retail court or at high traffic areas (e.g. major intersections, gateway entrances to Employment Area) 	<ul style="list-style-type: none"> • High design quality • 2,000 (fast food restaurant) to 50,000 sq.ft. (hotel or convention centre) • <3 to 5 ha lots • Commercial floor space per acre ratio of 200 to 400 sq.ft. of retail/service space per acre of developed Employment Area¹ • High building coverage and on-site employment density • Hotels, convention centres, equipment rentals, restaurants and service outlets and integrated service uses with non-retail uses (e.g. daycare) • Street lighting

¹ Town of Halton Hills Supportive Commercial Needs Assessment Premier Gateway Phase 1B Employment Area prepared by Tate Economic Research, October 2016.



Appendix E

Population and Employment Growth Forecasts



Figure E-1
Town of Halton Hills
Summary of Population and Employment Forecast by Sector, 2019 to 2041

Period	Forecast						Employment Activity Rates				
	Population ¹	Primary	Industrial ²	Commercial/ Population- Related ³	Major Office ⁴	Total Employment ⁵	Primary	Industrial	Commercial/ Population- Related	Major Office	Total Employment
2016	63,400	390	6,890	15,520	0	22,800	0.6%	10.9%	24.5%	0.0%	36.0%
2019	65,900	390	7,670	17,400	0	25,460	0.6%	11.6%	26.4%	0.0%	38.6%
2021	67,300	390	8,390	18,940	110	27,830	0.6%	12.5%	28.1%	0.2%	41.4%
2026	79,500	390	10,960	22,730	380	34,460	0.5%	13.8%	28.6%	0.5%	43.3%
2031	95,300	390	13,670	27,120	820	42,000	0.4%	14.3%	28.5%	0.9%	44.1%
2036	111,800	390	16,710	30,990	1,140	49,230	0.3%	14.9%	27.7%	1.0%	44.0%
2041	120,400	390	18,260	33,030	1,300	52,980	0.3%	15.2%	27.4%	1.1%	44.0%
Incremental Growth											
2016-2019	2,500	0	780	1,880	0	2,660	0.00	0.01	0.02	0.00	0.03
2019-2021	1,400	0	720	1,540	110	2,370	0.00	0.01	0.02	0.00	0.03
2021-2026	12,200	0	2,570	3,790	270	6,630	0.00	0.01	0.00	0.00	0.02
2026-2031	15,800	0	2,710	4,390	440	7,540	0.00	0.01	0.00	0.00	0.01
2031-2036	16,500	0	3,040	3,870	320	7,230	0.00	0.01	-0.01	0.00	0.00
2036-2041	8,600	0	1,550	2,040	160	3,750	0.00	0.00	0.00	0.00	0.00
2019-2041	54,500	0	10,590	15,630	1,300	27,520	0.00	0.04	0.01	0.01	0.05

Source: Watson & Associates Economists Ltd.

1. Population includes census undercount of approximately 3.7%.

2. Includes Industrial employment and a portion of the Town's No Fixed Place of Work employment.

3. Includes Commercial, Institutional, Work at Home and a portion of No Fixed Place of Work employment. Excludes forecast major office employment.

4. Major office employment is comprised of employment accommodated in office buildings greater than 1,900 sq.m (20,000 sq.ft.). A portion of the Town's No Fixed Place of Work employment is included in the forecast.



Figure E-2
Town of Halton Hills
Summary of Town-Wide and Employment Lands Growth Forecast by Sector
5-Year Increments, 2019-2041

Employment Type	Town-Wide Employment Growth by Sector						Employment Growth on Employment Lands						Percent of Town Employment Growth on Employment Lands (2019-2041)	Distribution of Employment Growth on Employment Lands (2019-2041)
	2019-2021	2021-2026	2026-2031	2031-2036	2036-2041	2019-2041	2019-2021	2021-2026	2026-2031	2031-2036	2036-2041	2019-2041		
Primary	0	0	0	0	0	0	0	0	0	0	0	0	0%	0%
Industrial	715	2,571	2,714	3,034	1,549	10,583	680	2,447	2,583	2,888	1,474	10,072	95%	73%
Commercial/Population-Related	1,542	3,788	4,392	3,863	2,047	15,632	245	602	698	614	325	2,483	16%	18%
Major Office	106	272	440	320	157	1,295	106	272	440	320	157	1,295	100%	9%
Total	2,363	6,631	7,546	7,217	3,753	27,510	1,032	3,344	3,726	3,817	1,931	13,850	50%	100%

Source: Watson & Associates Economists Ltd. Numbers may not add precisely due to rounding.

Note: Work at Home and No Fixed Place of Work is included in the Rural-Based, Industrial, Commercial/Population-Related and Major Office categories.



Appendix F

Employment Land Needs Scenarios



**Town of Halton Hills
Employment Land Needs Scenarios
2019 - 2041**

Scenario 1a: Includes All GTA West Corridor Protection Area ¹ and Includes OPA 31B Lands		
Land Demand		
Employment Growth on Employment Lands Adjusted for Intensification	12,920	
Forecast Employment Land Density (Jobs/ha)	20	
Employment Land Demand, Net ha	646	
Land Supply	Net ha	
	520	
Employment Land Needs	Net ha	Gross ha
	-126	-158

Scenario 2a: Includes Refined GTA West Corridor Protection Area ² and Includes OPA 31B Lands		
Land Demand		
Employment Growth on Employment Lands Adjusted for Intensification	12,920	
Forecast Employment Land Density (Jobs/ha)	20	
Employment Land Demand, Net ha	646	
Land Supply	Net ha	
	376	
Employment Land Needs	Net ha	Gross ha
	-270	-338

Scenario 3a: Excludes All GTA West Corridor Protection Area ¹ and <u>Includes</u> OPA 31B Lands		
Land Demand		
Employment Growth on Employment Lands Adjusted for Intensification	12,920	
Forecast Employment Land Density (Jobs/ha)	20	
Employment Land Demand, Net ha	646	
Land Supply	Net ha	
	242	
Employment Land Needs	Net ha	Gross ha
	-404	-505

Scenario 1b: Includes All GTA West Corridor Protection Area Lands ¹ and Excludes OPA 31 B Lands		
Land Demand		
Employment Growth on Employment Lands Adjusted for Intensification	12,920	
Forecast Employment Land Density (Jobs/ha)	20	
Employment Land Demand, Net ha	646	
Land Supply	Net ha	
	445	
Employment Land Needs	Net ha	Gross ha
	-201	-252

Scenario 2b: Includes Refined GTA West Corridor Protection Area ² and Excludes OPA 31 B Lands		
Land Demand		
Employment Growth on Employment Lands Adjusted for Intensification	12,920	
Forecast Employment Land Density (Jobs/ha)	20	
Employment Land Demand, Net ha	646	
Land Supply	Net ha	
	301	
Employment Land Needs	Net ha	Gross ha
	-345	-432

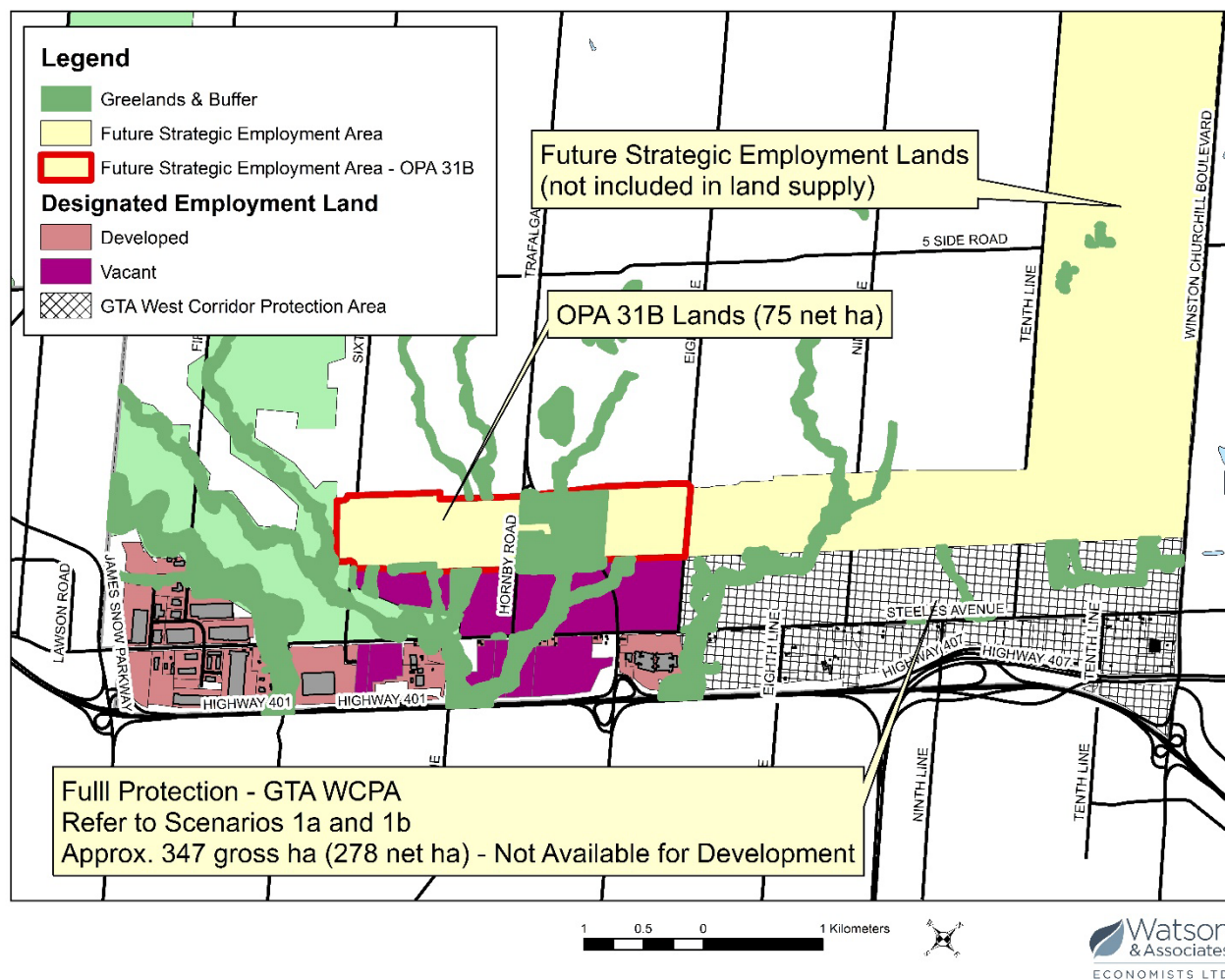
Scenario 3b: Excludes All GTA West Corridor Protection Area ² and <u>Excludes</u> OPA 31 B Lands		
Land Demand		
Employment Growth on Employment Lands Adjusted for Intensification	12,920	
Forecast Employment Land Density (Jobs/ha)	20	
Employment Land Demand, Net ha	646	
Land Supply	Net ha	
	167	
Employment Land Needs	Net ha	Gross ha
	-479	-599

1. GTA West Corridor Protection Area is approximately 347 ha gross in land area (278 net ha). Net to gross is approximately 80%.

2. Refined GTA West Corridor Protection Area is approximately 180 ha gross in land area (144 net ha). Net to gross is approximately 80%. In this scenario 134 net ha is considered available for development.



Map F-1
Employment Land Supply – Full Protection – G.T.A. W.C.P.A.





Map F-2
Town of Halton Hills
Employment Land Supply – Refined Protection Area – G.T.A. W.C.P.A.

