



 **Watson
& Associates**
ECONOMISTS LTD.

Phase 2 M.C.R. Report: Urban Land Needs Assessment

County of Wellington

Final Report

August 29, 2022

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Table of Contents

	Page
Executive Summary	i
1. Introduction.....	1-1
1.1 Study Process.....	1-1
1.2 Phase 1 M.C.R. Report Findings	1-2
1.3 Phase 2 Components	1-3
1.4 Provincial Policy Context	1-4
1.5 County of Wellington Official Plan	1-6
2. Community Area Land Needs Assessment.....	2-1
2.1 Introduction	2-1
2.1.1 Provincial L.N.A. Methodology	2-1
2.2 Intensification Analysis.....	2-2
2.2.1 Defining Residential Intensification	2-2
2.2.2 Benefits of Intensification	2-4
2.2.3 What is the Goal of Residential Intensification?	2-5
2.2.4 Development Trends in the B.U.A.....	2-6
2.2.5 Summary of Residential Intensification Opportunities and Constraints by Primary Urban Centre	2-11
2.2.6 Housing Intensification Supply Potential by Primary Urban Centre	2-14
2.2.7 Forecast Intensification Target by Area Municipality, 2022 to 2051	2-19
2.3 Population and Housing Allocation by Policy Area	2-23
2.3.1 Housing Forecast by Policy Area, 2022 to 2051	2-23
2.3.2 Population Forecast by Policy Area at 2051	2-24
2.4 Designated Greenfield Area Land Supply.....	2-26
2.4.1 What is the D.G.A.?	2-26
2.4.2 D.G.A. Land Supply Methodology	2-27
2.4.3 D.G.A. Land Supply by Status	2-28



Table of Contents (Cont'd)

	Page
2.4.4 Developed D.G.A. Lands	2-29
2.4.5 Vacant D.G.A. Lands	2-35
2.4.6 Approved Development in the D.G.A.	2-36
2.4.7 Future Development Lands.....	2-38
2.5 D.G.A. Land Needs.....	2-40
2.5.1 Summary of D.G.A. Population and Housing Growth to 2051	2-40
2.5.2 Community Area Employment in the D.G.A.	2-41
2.5.3 D.G.A. Community Area Density Targets.....	2-42
2.5.4 D.G.A. Land Needs to 2051	2-44
2.5.5 Community Area Lands – Settlement Area Boundary Expansion Lands (S.A.B.E.).....	2-46
2.5.6 Community Area Lands – Excess Lands	2-48
2.6 Community Area Recommendations	2-49
3. Community Area Employment Analysis.....	3-1
3.1 Introduction	3-1
3.1.1 Planning for Community Employment in Community Areas.....	3-1
3.1.2 What is Population-Related Employment?	3-2
3.1.3 County of Wellington O.P. Policies	3-6
3.2 Employment Forecast Allocation to Community Area	3-9
3.2.1 Community Area Employment Forecast by Policy Area.....	3-9
3.3 Commercial Overview.....	3-11
3.3.1 Existing Commercial Service and Retail Base, 2020	3-11
3.3.2 Commercial and Service Space Per Capita	3-13
3.3.3 Central Business Districts	3-14
3.3.4 Highway Commercial Vacant Land Supply	3-15
3.3.5 Urban Commercial Employment Land Demand and Land Requirements to 2051	3-17
3.4 Community Area Commercial Land Need Recommendations.....	3-20
4. Employment Area Analysis and Land Needs Assessment.....	4-1
4.1 Introduction	4-1
4.1.1 What are Employment Areas?	4-1
4.1.2 Planning for Employment in Employment Areas	4-2
4.1.3 County of Wellington O.P. Policies	4-5
4.2 Employment Area Overview	4-6
4.2.1 Characteristics of Wellington County's Employment Areas	4-6
4.2.2 Historical Employment Area Land Absorption.....	4-9
4.3 Employment Area Growth Forecast.....	4-11
4.3.1 Urban Employment Area Growth Forecast	4-11



Table of Contents (Cont'd)

	Page
4.3.2 Rural Employment Area Forecast	4-12
4.4 Employment Area Land Supply	4-13
4.4.1 Employment Area Land Supply Inventory Approach.....	4-13
4.5 Urban Employment Area Land Needs to 2051	4-15
4.5.1 Employment Area Land Supply, 2019.....	4-15
4.5.2 Urban Employment Demand to 2051	4-16
4.5.3 Forecast Urban Employment Area Land Absorption to 2051 ...	4-16
4.5.4 Urban Employment Area Land Needs to 2051.....	4-17
4.5.5 Urban Employment Area Land Excess	4-18
4.6 Rural Employment Area Land Needs to 2051	4-19
4.6.1 Forecast Rural Employment Area Land Absorption to 2051	4-19
4.6.2 Rural Employment Area Land Requirements to 2051	4-20
4.7 Urban and Rural Employment Area Recommendations	4-20
5. Urban Employment Area Conversion Review.....	5-1
5.1 What is an Employment Area Conversion?	5-1
5.2 Policy Context.....	5-1
5.3 Approach	5-2
5.3.1 Criteria Evaluation.....	5-2
5.3.2 Localized Conversion Criteria	5-3
5.4 Employment Area Conversion Requests Reviewed	5-4
5.5 Employment Area Conversion Review.....	5-5
5.5.1 Site 1 – 22 Park Road, South Elora Employment Area (Centre Wellington)	5-5
5.5.2 Site 2 – 6408, 6410, 6420 and 6430 Beatty Line, Fergus Beatty Line and Hill Employment Area.....	5-11
5.5.3 Site 3 – East of Beatty Line/Garafraxa Street – Fergus Beatty Line and Hill Employment Area.....	5-17
5.5.4 Site 4 – 350 Foster Street – Mount Forest Northwest Employment Area	5-24
5.5.5 Site 5 – E. of Highway 6 and North of Sligo Road – Mount Forest Northeast Employment Area	5-28
5.5.6 Site 6 – 510 Eliza Street, Arthur Employment Area	5-34
5.6 Recommendations	5-42
6. Conclusions	6-1
Appendix A Housing Forecast by Policy Area and Intensification Rates	A-1
Appendix B Tables and Maps of Housing Supply Potential.....	B-1
Appendix C Designated Greenfield Area Land Supply	C-1
Appendix D D.G.A. Forecast and Community Area Land Needs Tables	D-1



Table of Contents (Cont'd)

	Page
Appendix E D.G.A. Housing Units Per ha and Community Land Needs Assumptions.....	E-1
Appendix F Commercial Land Supply and Demand Tables and Mapping	F-1
Appendix G Employment Area Land Supply and Density Figures	G-1
Appendix H County of Wellington Employment Area Conversion Criteria.....	H-1



List of Acronyms and Abbreviations

A.R.U.	Additional residential unit
B.U.A.	Built-up area
C.B.D.	Central Business District
D.G.A.	Designated greenfield area
E.L.E.	Employment lands employment
G.G.H.	Greater Golden Horseshoe
G.I.S.	Geographic information systems
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.N.A.	Land needs assessment
M.C.R.	Municipal Comprehensive Review
M.D.S.	Minimum distance separation
N.A.I.C.S.	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.I.C.	Public Information Centre
P.P.S.	Provincial Policy Statement
P.P.U.	Persons per unit
P.R.E.	Population-related employment
S.A.B.E.	Settlement Area Boundary Expansion



Executive Summary



Executive Summary

The County of Wellington retained Watson & Associates Economists Ltd. (Watson) in late 2019 to prepare the growth management technical requirements of its Municipal Comprehensive Review (M.C.R.), and to provide the County with strategic policy recommendations to support the development of updated policies to the County's Official Plan (O.P.). The process of preparing an update to the County's O.P. represents an M.C.R. in accordance with section 26 of the *Planning Act*, R.S.O. 1990, c. P.13.

The M.C.R. technical reporting has been organized into two reports:

- Phase 1 M.C.R. Report – Growth Forecasts and Growth Allocations; and
- Phase 2 M.C.R. Report – Urban Land Needs Assessment

A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (Growth Plan, 2019) requires municipalities to update their respective O.P. to a 2051 horizon. The County of Wellington Phase 1 M.C.R. Report provides a long-term County-wide population, housing and employment forecast to 2051, as well as allocations of population, housing and employment by Area Municipality and Urban Centre. A key component of the County of Wellington Phase 1 M.C.R. Report was a review of the Urban and Rural Systems, including settlement hierarchy which guided the growth allocations.

The County of Wellington Phase 1 M.C.R. Report was initially released in June 2021. The report was updated with an addendum on January 31, 2022^[1] based on comments received following a public information centre (P.I.C.) session^[2] held in June 2021 and discussions with Area Municipalities.

This report, the County of Wellington Phase 2 M.C.R. Report, identifies the urban land requirements for the County's Urban System (designated greenfield area (D.G.A.) Community Area and Urban Employment) and provides further recommendations for accommodating growth in the Urban and Rural Systems.

^[1] County of Wellington M.C.R. Phase 1 Final Report (as amended January 31, 2022).

^[2] P.I.C. session was held on June 23, 2021, to present the findings of the M.C.R. Phase 1 Report.



Key components of this Phase 2 Report include:

- A review of intensification opportunities and challenges in meeting the County's existing target of 20% annual housing growth within the built-up area (B.U.A.) and a recommendation on the County's intensification target;
- An assessment of the D.G.A. density target of 40 people and jobs/gross ha and a recommendation on the County's target;
- An Employment Area density target for the O.P.;
- Land requirements for the D.G.A. Community Area and Employment Areas within the Urban System; and
- Planning policy considerations with respect to planning for growth and growth management.

The initial findings of the County of Wellington M.C.R. Phase 2 Report were presented to the public at a virtual P.I.C. session on December 13, 2021, as well as to local councils upon request (Township of Centre Wellington (November 22, 2021) and Township of Wellington North (February 7, 2022)).

Land Needs Assessment Approach

The Growth Plan, 2019 requires municipalities to review and evaluate the minimum greenfield density and intensification targets and forecasts contained in the Growth Plan. The Growth Plan's minimum intensification and greenfield density targets are to be used as key inputs in preparing a land needs assessment (L.N.A.) that identifies the urban land requirements to accommodate population, housing and employment growth to 2051. The outcome of the L.N.A. may indicate sufficient land, a need for a Settlement Area Boundary Expansion (S.A.B.E.) or may identify a surplus of urban lands which may require the identification of Excess Lands. The L.N.A. is to be prepared in accordance with the provincial Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020).

The provincial L.N.A. methodology requires that land needs are to be assessed across two different areas within the Urban System including **Community Areas** and **Employment Areas**. Community Areas include the areas in the Urban Centres that accommodate housing and the majority of population-related jobs (e.g., commercial, office and institutional uses) that support the population base. Employment Areas are



industrial clusters in the Urban Centres and are designated in the County's O.P. as Industrial.

The L.N.A. methodology includes six key components in establishing Community Area land needs. The County of Wellington Phase 1 M.C.R. Report completes the first three components of the L.N.A. methodology for Community Areas, including:

- Component 1: Population Forecasts
- Component 2: Housing Need
- Component 3: Housing Needs Allocation.

This Phase 2 Report completes the remaining components set out in the L.N.A. methodology for Community Areas, including:

- Component 4: Housing Supply Potential by Policy Areas
- Component 5: Community Area Jobs
- Component 6: Need for Additional Land.

It is important to recognize that the Growth Plan, 2019 approaches S.A.B.E.s differently for the Urban and Rural Areas. An assessment of the Rural Employment Area has been provided in this report to the County and its Area Municipalities for planning purposes.

Key findings of the County of Wellington M.C.R. Phase 2 Report are provided below with respect to the residential and non-residential growth trends as well as corresponding urban land needs by Area Municipality in Wellington County to the year 2051.

Residential Intensification Target

It is anticipated that most of the County's Urban Centres will provide an increasing role in accommodating a broadening range of future housing options by structure type, density and tenure (ownership and rental), as discussed in the County of Wellington Phase 1 M.C.R. Report. Notwithstanding this potential for increased housing options within the County's urban areas, the results of this M.C.R. identify that the County's current housing intensification target of 20% is not considered realistic based on historical development trends, anticipated demand and available housing supply opportunities within the B.U.A. across the County. To achieve an intensification target



of 20%, the County would need to accommodate 4,300 housing units within the B.U.A. over the 2022 to 2051 period. Based on a review of housing intensification potential, it is estimated that the County only has the intensification potential of up to 3,200 units (adjusted estimate for the 2022 to 2051 period).^[1] In order to accommodate a 20% housing intensification rate, the County would need to accommodate a large portion of intensification through redevelopment. Furthermore, it is important to recognize that not all sites identified in the housing intensification supply potential may be available or developed over the planning horizon. As discussed in Chapter 2, cultural heritage, floodplain and servicing issues have the potential to limit residential intensification opportunities on vacant lands and through redeveloped sites for some Urban Centres. Accordingly, it is recommended that the County request an alternative residential intensification target of 15%.^[2]

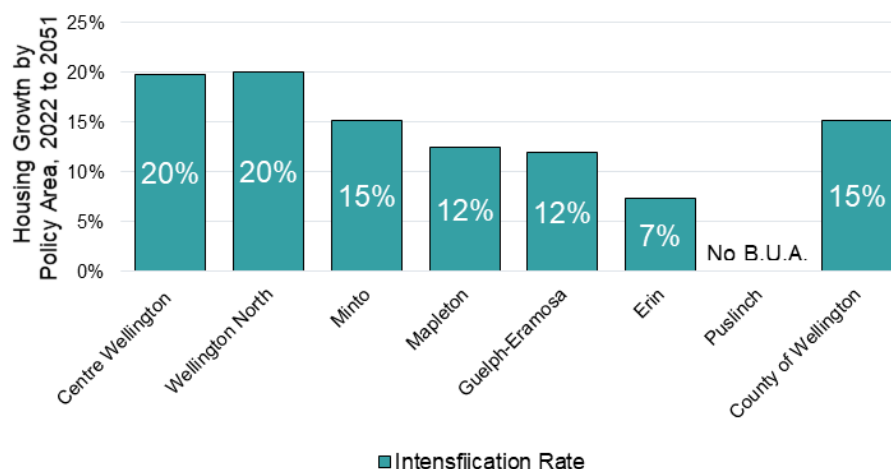
Figure ES-1 summarizes the County of Wellington's housing intensification targets by Area Municipality. The Township of Centre Wellington and the Township of Wellington North are anticipated to achieve an intensification rate of 20%, followed by Minto at 15%, Mapleton and Guelph-Eramosa at 12% and Erin at 7%. The Township of Puslinch does not have a B.U.A.

^[1] County of Wellington Official Plan, policy 4.4.6., p. 40.

^[2] Housing supply data was compiled as of mid-2019. Supply has been adjusted to reflect large redevelopment in Elora and updated additional residential unit (A.R.U.) activity.



Figure ES-1
County of Wellington
Residential Housing Intensification Target by Area Municipality, 2022 to 2051



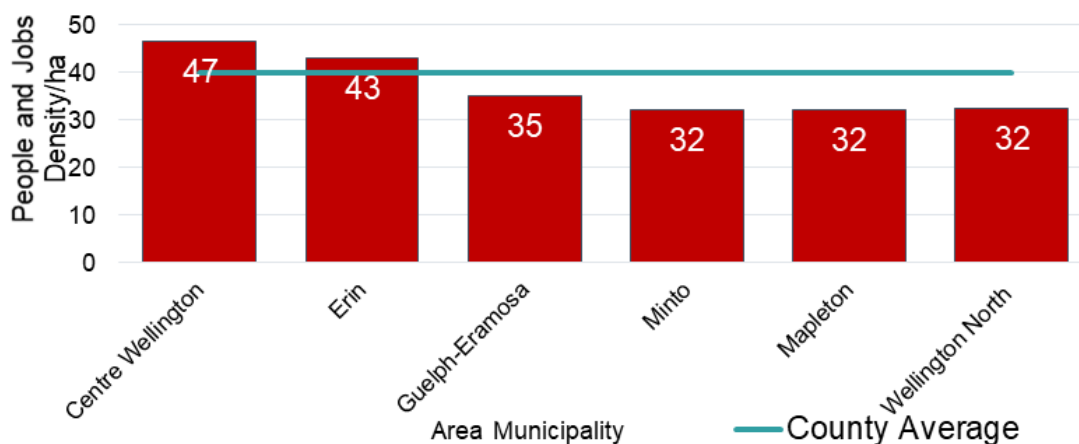
Source: Watson & Associates Economists Ltd.

Community Area Land Needs

The D.G.A. lands in Wellington County are anticipated to average 40 people and jobs/ha by 2051. The density is expected to range across the County from 32 people and jobs/ha to 47 people and jobs/ha. Density targets by Area Municipality have been established in consideration of existing density, average density of approved/draft approved developments, forecast housing mix and potential density on vacant D.G.A. lands. Figure ES-2 provides a summary of forecast D.G.A. density by Area Municipality.



Figure ES-2
County of Wellington
D.G.A. People and Jobs Density by Area Municipality, 2051



Source: Watson & Associates Economists Ltd.

Based on the comprehensive analysis carried out herein, it has been determined that the County has an overall shortfall of designated Community Area land totalling approximately 501 gross ha to 2051; however, adjusted for recommended Employment Area land conversions, the shortfall is reduced to 491 gross ha. To accommodate this identified shortfall, the County will need to redesignate approximately 195 ha of Future Development lands to Community Area uses and expand Urban Settlement Area boundaries by an additional 290 ha (adjusted to reflect recommended conversions discussed in Chapter 5), as summarized in Figure ES-3. Recognizing differences in local urban land supply and demand across the County, it is recommended that approximately 89 ha of Future Development lands in Wellington North are identified as Excess Lands.

It is important to note that the South Fergus Secondary Plan is underway (not yet approved) and that the density for Fergus may potentially be upwardly adjusted during Phase 3 of the County of Wellington M.C.R. based on the completed South Fergus Secondary Plan. An adjustment to the density in Fergus may reduce the land need requirements for Centre Wellington, specifically the Fergus Urban Centre.

Figure ES-3 provides a summary of Community Area land needs by Area Municipality.



Figure ES-3
County of Wellington
Urban Community Area Land Needs
Adjusted for Recommended Employment Area Conversions

Area Municipality	Redesignation of Future Development Lands to Community Area	Community Area S.A.B.E., ha	Community Area Excess, ha
Centre Wellington	-	238	-
Mapleton	15	34	-
Minto	61	18	-
Wellington North	81	-	89
Puslinch	-	-	-
Guelph-Eramosa	-	-	-
Erin	38	-	-
County of Wellington	195	290	89

Notes: Adjustment made to the Township of Wellington North (2 ha) and the Township of Centre Wellington (9 ha) to account for recommended Employment Area to Community Area conversions.

Source: Watson & Associates Economists Ltd.

Accommodating commercial lands is a component of the Community Area land needs consideration. Based on the commercial analysis, most of the Community Area land needs identified are determined to accommodate primarily residential uses. Within the County, it is forecast that Hillsburgh has the largest need for additional commercial land (7 ha), while Drayton, Palmerston and Arthur require 2 to 3 ha. These commercial land requirements could be accommodated through the redesignation of Future Development lands. New designated commercial lands should be added in strategic areas that strengthen and complement the existing commercial structure. While Fergus has a small surplus of commercial land (5 ha), any changes to the South Fergus Secondary Plan with respect to commercial land may have an impact on commercial needs.

Employment Area Land Needs

Employment Areas will continue to be an important component of the County's economic base, as discussed in the County of Wellington Phase 1 M.C.R. Report. Based on the comprehensive analysis carried out herein, it has been determined that the County has an overall shortfall of approximately 192 gross ha of designated



Employment Area lands to accommodate employment growth to 2051 (adjusted to reflect recommended conversions). Accordingly, the County will need to expand its Urban Settlement Area boundaries to accommodate additional Employment Area lands in Centre Wellington, Mapleton and Erin. Recognizing differences in local urban land supply and demand across the County, it is recommended that all, or a significant portion, of the 40-ha surplus of Employment Area lands in Wellington North be identified as Excess Lands. The Town of Minto has a surplus of 14 ha of Employment Area lands.

Figure ES-4 provides a summary of the Urban Employment Area land needs by Area Municipality adjusted for recommended Employment Area land conversions.

Figure ES-4
County of Wellington
Urban Employment Area Land Needs
Adjusted for Recommended Employment Area Conversions

Area Municipality	Urban Employment Area S.A.B.E., ha	Urban Employment Area Excess, ha
Centre Wellington	160	-
Mapleton	9	-
Minto	-	-
Wellington North	-	40
Puslinch	-	-
Guelph-Eramosa	-	-
Erin	23	-
County of Wellington	192	40

Notes: Adjusted for recommended Employment Area to Community Area conversions in the Township of Wellington North (2 ha) and the Township of Centre Wellington (14 ha).

Source: Watson & Associates Economists Ltd.

Rural Employment Area Land Needs

It is important to recognize that the Growth Plan, 2019 approaches S.A.B.E.s differently for the Urban and Rural Areas. An assessment of the Rural Employment Area has been provided to the County and its Area Municipalities for planning purposes. It has been identified that the Township of Puslinch has a shortfall of approximately 30 ha of Rural Employment Area lands to accommodate employment growth to 2051.



Employment Area Conversion Review

This report reviewed six Employment Area land conversions as summarized in Figure ES-5.

Figure ES-5
County of Wellington
Conversion Request Sites Reviewed

Site	Urban Centre	Site Location	Recommendation
Site 1	Elora	22 Park Road (B.U.A.) Land Area: 1.3 ha	Recommended Conversion to Highway Commercial (no provision for residential)
Site 2	Fergus	6408, 6410, 6420 and 6430 Beatty Line (D.G.A.) Land Area: 9 ha	Recommended Conversion to Residential and Mixed-use
Site 3	Fergus	East of Beatty Line and South of Garafraxa Street (B.U.A.) Land Area: 24 ha	Recommended Special Policy Area to Allow for Transition to Mixed-use
Site 4	Mount Forest	350 Foster Street (B.U.A.) Land Area: 0.4 ha	Maintain as Employment Area
Site 5	Mount Forest	East of Highway 6 and North of Sligo Road (D.G.A.) Land Area: 21 ha	Maintain 19 ha as Employment Area; and covert 2 ha to Community Area
Site 6	Arthur	510 Eliza Street (D.G.A.) Land Area: 8 ha	Maintain as Employment Area

Source: Watson & Associates Economists Ltd

The Employment Area land conversion sites were comprehensively reviewed. Three sites within the Township of Wellington Centre were recommended for conversions, with the following impact on land needs:

- An additional 14 ha of employment lands are required for S.A.B.E. Accordingly, Centre Wellington land requirements for Employment Area lands increase from 146 ha to 160 ha.
- Community Area S.A.B.E. requirements for Centre Wellington are reduced by 9 ha from 247 ha to 238 ha.
- Two of the recommended Employment Area conversion sites are in the B.U.A. and increase the commercial/mixed-use and housing intensification potential for Centre Wellington. These lands are approximately 25 ha in area. The largest site area is 24 ha and is situated in the Beatty Line and Hill Employment Area. It



is recommended that this site is identified as a special policy area to recognize the transitioning nature of this site from an Employment Area to a mixed-use area. The site currently includes one large industrial use in a heritage building, and primarily commercial uses that are permitted under the Industrial designation.

Three sites in the Township of Wellington North were comprehensively reviewed. It is recommended that most of these lands remain as Employment Area. A small portion of an Employment Area site, east of Highway 6 and north of Sligo Road in Mount Forest, totalling 2 ha, is recommended for conversion to Community Area due to its location next to a sensitive use (secondary school) and the lack of area to accommodate an adequate buffer. This adjustment to the Employment Area in Mount Forest would provide a more define Employment Area edge.

Summary of Community Area and Employment Area Land Needs to 2051

Figure ES-6 provides a summary of the Community Area and Employment Area land needs by Area Municipality adjusted for Employment Area conversions.

Figure ES-6
County of Wellington
Summary of Land Needs, Adjusted for Recommended Employment Area Conversions

Area Municipality	Redesignation of Future Development Lands to Community Area	Community Area S.A.B.E., ha	Community Area Excess, ha	Urban Employment Area S.A.B.E., ha	Rural Employment Area Needs, ha	Urban Employment Area Excess, ha
Centre Wellington	-	238	-	160	-	-
Mapleton	15	34	-	9	-	-
Minto	61	18	-	-	-	-
Wellington North	81	-	89	-	-	40
Puslinch	-	-	-	-	30	-
Guelph-Eramosa	-	-	-	-	-	-
Erin	38	-	-	23	-	-
County of Wellington	195	290	89	192	30	40

Note: Adjusted for recommended Employment Area to Community Area conversions in the Township of Wellington North (2 ha) and the Township of Centre Wellington (14 ha). Conversion of sites in the Township of Centre Wellington includes 5 ha in the B.U.A. and 9 ha in D.G.A. Lands in the B.U.A. provide intensification opportunities and do not reduce Community Area land needs.

Source: Watson & Associates Economists Ltd.



Conclusions and Next Steps

This report will form an important component in supporting the analysis in the Phase 3 M.C.R. Report. The Phase 3 M.C.R. Report will primarily focus on S.A.B.E.s with a review of location options for new Community Areas and Employment Areas. In addition, the Phase 3 M.C.R. Report will include a review of the redesignation of Future Development lands to support designated land needs. Finally, the Phase 3 M.C.R. Report will identify the final locations of Excess Lands and the policy approach to manage these lands in the County's O.P.

More specifically, the County of Wellington Phase 3 M.C.R. Report will explore the following based on the findings of this Phase 2 M.C.R. Report:

Community Area

- Future Development lands of approximately 195 ha to be redesignated to Community Area land (e.g., residential, mixed-used, commercial, etc.);
- Location options for 290 ha of an S.A.B.E. (adjusted based on conversion recommendations) based on the results of this Phase 2 study;
- Location options for 89 ha of identified Excess Lands in Wellington North (lands that are currently designated as Future Development) and the development of a policy approach to manage these lands in the County's O.P. (i.e., Excess Lands policy overlay); and
- Additional policy considerations.

Employment Area

- Location options for 192 ha of an S.A.B.E. (upwardly adjusted based on recommended Employment Area conversions) based on the results of this M.C.R. Phase 2 Report;
- Location options for 40 ha of identified Excess Lands in Wellington North (lands that are currently designated as Industrial);
- The development of a policy approach to manage Excess Lands in the County's O.P. (i.e., Excess Lands policy overlay); and
- Additional policy considerations.



As part of the Phase 3 M.C.R. Report or separate study, the County will explore the following:

Rural Area

- Address Rural Employment Area land needs of approximately 30 ha within the Township of Puslinch; and
- Review rural residential development potential in secondary urban centres (Aberfoyle and Morriston), hamlets and through severances in the secondary agricultural area.



Report



Chapter 1

Introduction



1. Introduction

1.1 Study Process

The County of Wellington retained Watson & Associates Economists Ltd. (Watson) in late 2019 to prepare the growth management technical requirements of its Municipal Comprehensive Review (M.C.R.), and to provide the County with strategic policy recommendations to support the development of updated policies to the County's Official Plan (O.P.). The process of preparing an update to the County's O.P. represents an M.C.R. in accordance with section 26 of the *Planning Act*, R.S.O. 1990, c. P.13.

The M.C.R. technical reporting has been organized into two reports:

- Phase 1 M.C.R. Report – Growth Forecasts and Growth Allocations; and
- Phase 2 M.C.R. Report – Urban Land Needs Assessment

The County of Wellington Phase 1 M.C.R. Report was initially released in June 2021 and updated with an addendum on January 31, 2022,^[1] based on comments received following a public information centre (P.I.C.) session^[2] held in June 2021, and discussions with Area Municipalities.

Key components of the County of Wellington Phase 1 M.C.R. Report include the following:

- A review of the Urban and Rural Systems, including settlement hierarchy;
- Long-term County-wide population, housing and employment forecasts to 2051;
- Allocations of population, housing and employment by Area Municipality and Urban Centre; and
- Phase 1 conclusions and recommendations.

The results of the County of Wellington Phase 1 M.C.R. Report informed the County's first proposed Official Plan Amendment (O.P.A.) under the O.P. Review, referred to as

^[1] County of Wellington M.C.R. Phase 1 Final Report (as amended January 31, 2022).

^[2] P.I.C. session was held on June 23, 2021, to present the findings of the M.C.R. Phase 1 Report.



O.P.A. 119. This amendment proposes changes to the County's Growth Structure and Settlement Hierarchy and is intended to serve as the structure for guiding and prioritizing future growth in Wellington County. O.P.A. 119 also included the identification of a new Regionally Significant Economic Development Study Area and the identification of the historic hamlet of Puslinch.^[1]

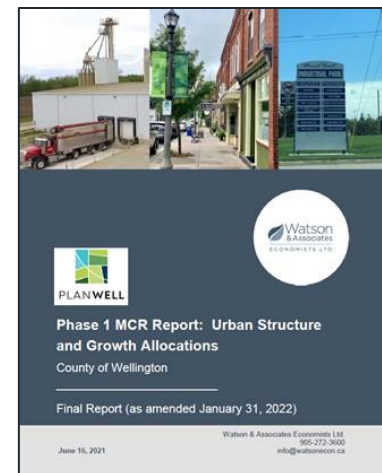
The proposed O.P.A. 119 was presented at a virtual Public Open House session on January 31, 2022. Following the Public Open House, the County of Wellington Planning Committee held a Public Meeting on February 10, 2022, to provide the public with an opportunity to make formal submissions to the Planning Committee on proposed O.P.A. 119.

1.2 Phase 1 M.C.R. Report Findings

The Phase 1 M.C.R. Report recommendations regarding the County's proposed urban structure, and its population, household and employment forecast to 2051 are provided below.

Urban and Rural System

- The County should provide a distinction between the Urban System and the Rural System based on servicing (water and wastewater) and where most of the growth is to be allocated, in accordance with policies found in A Place to Growth: Growth Plan for the Greater Golden Horseshoe, 2019 (Growth Plan, 2019). It is recommended that the Urban System be defined based on full servicing, while the remaining be classified as the Rural System.
- Urban Centres without full servicing, which includes Aberfoyle and Morriston, are recommended to be referred to as Secondary Urban Centres within the Rural System and identified as priority settlement areas



^[1] County of Wellington, PlanWell Website - <https://www.wellington.ca/en/resident-services/pl-official-plan-review.aspx#Official-Plan-Amendments>, accessed February 14, 2022.



within the Rural System given the importance of these settlement areas as community hubs.

- All Urban Centres (12 in total) with full municipal servicing are recommended to be referred to as Primary Urban Centres.
- The County should consider modifying the Employment Area definition in the County's O.P. to include only areas identified in the O.P. as Industrial and Rural Employment Areas (i.e., exclude Highway Commercial), lands which are identified in provincial policies for protection to non-employment uses.

County-Wide Forecast

- In accordance with the comprehensive analysis provided in the County of Wellington Phase 1 M.C.R. Report, Final Report (as amended January 31, 2022), the Growth Plan, 2019 (Schedule 3) is recommended as the preferred long-term growth scenario for the County of Wellington. As such, a higher long-term population forecast for the County of Wellington is not supported for the purposes of long-term growth management and urban land needs analysis.

Growth Allocations to 2051

- It is recommended that the County adopt the growth allocations by Area Municipality to 2051. Area Municipalities may elect to make further refinements to the rate of population and employment growth within the 2021 to 2051 planning horizon.
- It is further recommended that the County and Area Municipalities that have an identified Urban System, plan for a steady shift in their population and employment base towards urban development.

1.3 Phase 2 Components

The Phase 2 M.C.R. Report identifies the urban land requirements for the County's Urban System (designated greenfield area (D.G.A.) Community Area and Urban Employment) and provides further recommendations for accommodating growth in the Urban and Rural Systems.



Key components of this Phase 2 M.C.R. Report include:

- A review of intensification opportunities and challenges in meeting the County's existing target of 20% of annual housing growth within the built-up area (B.U.A.) and a recommendation on the County's intensification target;
- An assessment of the D.G.A. density target of 40 people and jobs/gross ha and a recommendation on the County's target;
- An Employment Area density target for the O.P.;
- Land requirements for the D.G.A. Community Area and Employment Areas within the Urban System; and
- Planning policy considerations with respect to planning for growth and growth management.

The initial findings of the County of Wellington Phase 2 M.C.R. Report were presented to the public at a virtual P.I.C. session on December 13, 2021, as well as to local councils upon request (Township of Centre Wellington (November 22, 2021) and Township of Wellington North (February 7, 2022)).

1.4 Provincial Policy Context

The following provincial policies and documents inform the land needs assessment, as discussed in the County of Wellington Phase 1 M.C.R. Report.

Provincial Policy Statement (P.P.S., 2020)

- The P.P.S., 2020 provides policy direction on matters of provincial interest relating to land use planning and development. While market demand is important when considering long-range, land use planning, this demand must be broadly considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; and diversifying an economic base and supporting job creation.
- Notable policies related to planning for Employment Areas in the updated P.P.S., 2020 require municipalities to have enough urban land supply to meet projected needs for a planning horizon of 25 years, and include Employment Areas as areas that could be planned for beyond this horizon, provided they are not designated beyond the planning horizon.



A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019

The Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including land use, infrastructure, and transportation. The Growth Plan, 2019 provides minimum population and employment forecasts for the County of Wellington. Policies provide targets in managing and directing growth, including:

- Minimum housing intensification target – 20% of annual housing to be accommodated in the B.U.A. of Wellington County;
- Minimum D.G.A. – an average of 40 people and jobs within County of Wellington’s D.G.A. by 2051; and
- Upper-tier and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within the settlement area.

It should be noted that all upper-tier and single-tier municipalities can apply for alternative D.G.A. density targets.

Land Needs Assessment Methodology for the Greater Golden Horseshoe

The Provincial Land Needs Assessment (L.N.A.) methodology identifies that the results of an L.N.A. can only be implemented through an upper-tier or single-tier M.C.R. The results of the L.N.A. may identify a need for additional urban lands which may result in a settlement area boundary expansion (S.A.B.E.) or may identify a surplus of urban lands which may require the identification of Excess Lands.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas within the urban system including **Community Areas** and **Employment Areas**. It is important to recognize that the L.N.A. methodology focuses on the urban system, where there are settlement areas with servicing and urban amenities that support the growth management policies of the Growth Plan, 2019.

Provided below is a summary of the two areas that are reviewed for land requirements.

“Community Areas: Areas where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment land



employment jobs. Community areas include delineated built-up areas and the designated greenfield area (excluding employment areas).

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

1.5 County of Wellington Official Plan

As part of the M.C.R. and the O.P.’s five-year review process, the County is required to update the County’s O.P. with the current version of the Growth Plan, 2019 (as amended, Office Consolidation 2020). The Growth Plan, 2019 requires municipalities to update their respective O.P. to a 2051 horizon, including reviewing and evaluating the minimum density and intensification targets and forecasts contained in the Growth Plan as part of the M.C.R. process.

This Phase 2 M.C.R. Report reviews the following key growth management targets identified in the County’s O.P.:

- Strive to attain at least 16 units per gross ha (6.5 units per gross acre) in newly developing subdivisions;^[1]
- Require new developments to achieve densities which promote the overall greenfield density target of 40 persons and jobs/ha;^[2]
- Target a minimum of 25% of new housing units in the County to be affordable (affordable is 10% below the average price in the market area);^[3] and
- Ensure that by the year 2015, and for each year thereafter, a minimum of 20% of all residential development occurring annually will be within the B.U.A.^[4]

^[1] County of Wellington Official Plan, May 6, 1999 (Last Revision January 8, 2021), Policy 4.4.4., p. 25.

^[2] Ibid., p. 25.

^[3] Ibid.

^[4] Ibid., Policy 3.3.1, p. 20.



The County's O.P. does not contain policies on targeting Employment Area density. As part of this Phase 2 M.C.R. Report, a density target for Urban Employment Areas will be identified that reflects the location conditions and anticipated outlook within the County.



Chapter 2

Community Area Land Needs Assessment



2. Community Area Land Needs Assessment

As previously discussed in Chapter 1, the provincial L.N.A. methodology requires that land needs are to be assessed across two different areas within the Urban System including Community Areas and Employment Areas. This chapter provides an assessment of the County's Community Area Land Needs by Area Municipality. A summary of the County's Community Area employment forecast, as per Component 5 of the L.N.A., is summarized in this chapter with further details provided in Chapter 3.

2.1 Introduction

2.1.1 Provincial L.N.A. Methodology

The L.N.A. methodology includes six key components in establishing Community Area land needs. The County of Wellington Phase 1 M.C.R. Report completes the first three components of the L.N.A. methodology for Community Areas, including:

- Component 1: Population Forecasts
- Component 2: Housing Need
- Component 3: Housing Needs Allocation

This Phase 2 M.C.R. Report completes the remaining components set out in the L.N.A. methodology for Community Areas, including:

- Component 4: Housing Supply Potential by Policy Areas
- Component 5: Community Area Jobs
- Component 6: Need for Additional Land

Maps of the Community Area including the identification of the D.G.A. and B.U.A. policy areas are provided in Appendix B for each primary Urban Centre in the County of Wellington.



2.2 Intensification Analysis

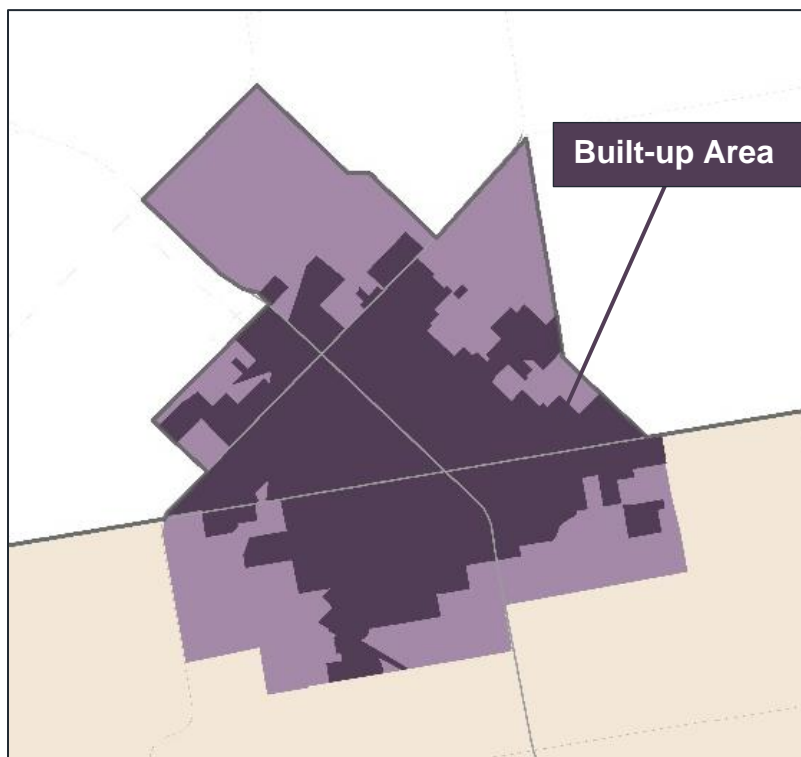
2.2.1 Defining Residential Intensification

The Growth Plan, 2019 considers any residential development within the delineated B.U.A. as intensification. All residential development between mid-2022 and mid-2051 occurring within the B.U.A. counts towards the County's intensification target. For municipalities in the Greater Golden Horseshoe (G.G.H.), a B.U.A. was delineated for all urban settlements as of 2006 as part of the Growth Plan for the Greater Golden Horseshoe, 2006 under the *Places to Growth Act, 2005*.^[1] The B.U.A. was based on the portion of the urban settlement that was primarily developed at that time. The remaining portion of the urban settlement outside the B.U.A. is referred to as the D.G.A. It is important to note that the delineation of the B.U.A. does not change over time. Figure 2-1 illustrates the B.U.A. in the Mount Forest Urban Centre as an example. The B.U.A. is identified in dark purple.

^[1] Places to Grow. Better Choices. Brighter Future. Built Boundary for the Growth Plan for the Greater Golden Horseshoe, 2006. Ministry of Public Infrastructure Renewal. Ontario. 2008.



Figure 2-1
County of Wellington
B.U.A. Example (Mount Forest Urban Centre)



Source: County of Wellington Planning Department.

As discussed in Chapter 1, the Growth Plan, 2019 intensification target is a minimum and planning for a lower target requires an alternative request to be made to the Province. The intensification target is based on the minimum percentage of all residential development occurring annually within the delineated B.U.A. This target is measured from July 2022 to 2051. The start of the period in mid-2022 represents the required O.P. review completion deadline for all upper-tier and single-tier municipalities in accordance with the Growth Plan, 2019. The County of Wellington is required to target or improve upon the existing intensification target set in the County's existing O.P. which is currently 20%.

Intensification can take many forms. The P.P.S., 2020 defines intensification as development of a property, site or area at a higher density than currently exists already. As previously discussed, intensification under the Growth Plan, 2019 builds on the



P.P.S., 2020 definition, but also includes all other residential development within the B.U.A. The following are examples of intensification forms:

- Development on vacant sites within the B.U.A.;
- Redevelopment, including the reuse of brownfield sites;
- Additional development on underutilized lots;
- Infill development and development on small vacant sites surrounded by developed parcels;
- Expansion or conversion of existing buildings (e.g., non-residential building converted to residential use); and
- Second units (or additional residential unit (A.R.U.)).

2.2.2 *Benefits of Intensification*

Residential intensification provides an opportunity to broaden the choice of housing, particularly towards medium- and high-density housing forms in settings that are rich in urban amenities, such as downtown areas, as well as other potential redevelopment areas, which can encourage pedestrian-friendly, healthy and complete communities. More specifically, residential intensification provides many potential benefits for the County of Wellington including:

- Opportunities to promote “place-making”^[1] and enhance the vibrancy of mature neighbourhoods and core areas by continuing to attract new residents as well as commercial investment;
- Supporting local businesses by increasing foot traffic;
- Creating active streets to promote healthier lifestyle options (i.e., pedestrian and cycling);
- Decreasing the number or length of automotive travel trips by providing housing opportunities for shopping and employment options closer to home;
- Reducing the County’s need to accommodate housing within existing greenfield areas and/or urban expansion areas;

^[1] Place-making is a process of creating unique, quality locations, places or spaces that possess a strong sense of place. With respect to places of work, the concept of place-making often encompasses the attraction of knowledge-based workers and businesses with an emphasis on collaboration, connection, and innovation.



- Expanding the housing options with a potential for higher density, or housing in a mixed-use environment; and
- Potential environmental benefits associated with reduced automobile dependency and urban land consumption.



Elora Little Folks Factory site before redevelopment, Elora (Centre Wellington)



Elora Little Folks Factory site after redevelopment, Foundry Building, 24 Carlton Place, Elora (Centre Wellington).
Image Source: Google Earth

2.2.3 What is the Goal of Residential Intensification?

The goal of residential intensification is to incorporate A.R.U.s into an existing neighbourhood to broaden housing supply options in the community, as well as to reduce the need to expand outward, in a manner that does not negatively impact existing neighbourhoods. Forecast residential intensification potential by Urban Centre and the County's total intensification rate has been assessed based on a consideration of the following supply and demand factors:

- Available vacant land supply within the B.U.A. by Urban Centre;
- Historical housing intensification trends;
- A.R.U. opportunities;
- Redevelopment opportunities;
- Character and size of each B.U.A.;
- Environmental constraints (such as flooding hazards); and
- Cultural heritage resource conservation.

What Tools does the County and its Area Municipalities have to Ensure Appropriate Residential Intensification Projects?

There are a number of planning tools available to ensure that residential intensification is designed in a manner that is appropriate to the neighbourhood and protects the



character and heritage of the area. The County's O.P. and applicable local plans (Town of Erin O.P. and Centre of Wellington O.P.) establish the general land use pattern, as well as specific policies to manage intensification. The B.U.A. is considered the primary location for residential intensification; however, the County and its Area Municipalities have planning tools to review intensification development applications on a site-specific basis, including zoning by-laws, severances/plans of subdivisions and site plan control. Site plan control is a tool available to municipalities under the Ontario *Planning Act* that enables the municipalities to perform a detailed review of proposed developments, including non-residential and multiple-unit residential projects. Site plan control will allow the County and its Area Municipalities to consider a number of site elements for residential development applications, including those that are sensitive to the character and heritage features of the area. It is important to note that this M.C.R. does not set the amount of intensification growth to be directed by specific neighbourhoods within the B.U.A.; rather, it is recommended that the County and its Area Municipalities continue to review intensification development applications on a site-by-site basis.

Where should Residential Intensification be Accommodated?

Forecast residential intensification potential has been based on a review of development opportunities on remaining vacant lots by Urban Centres (refer to Appendix A for mapping), redevelopment opportunities on brownfield sites, inclusion of residential uses within Highway Commercial sites (appropriate location and scale) and gentle intensification in stable neighbourhoods with the opportunity for A.R.U.s.

The intensification housing forecast is provided in section 2.3 of this Report.

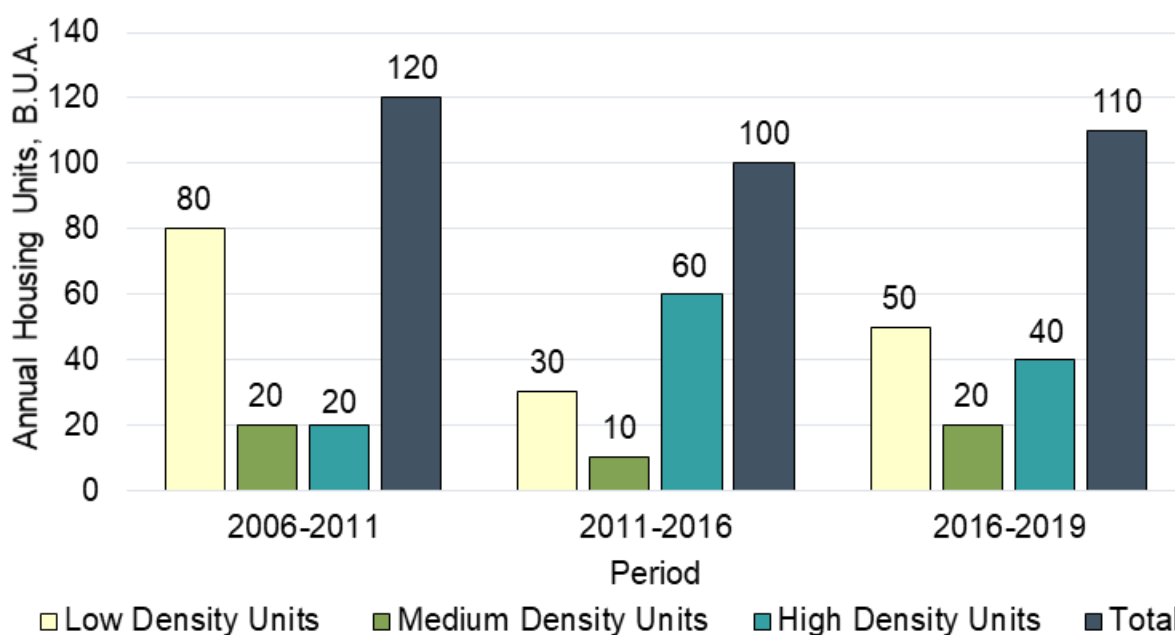
2.2.4 Development Trends in the B.U.A.

Since 2006, a large portion of housing growth that occurred within the County's B.U.A. primarily consisted of at-grade housing (singles, semi-detached and townhouses) that included the completion of later phases of subdivisions that were built after the delineation of the B.U.A. in 2006. Over the 2016 to 2019 period, approximately 20% of the County's housing occurred within the B.U.A., representing approximately 110 housing units annually. It is important to recognize, however, that a large share of residential intensification recently achieved in the County has been associated with low-density housing development related to the rounding out of subdivisions since the creation of the B.U.A. in 2006. As summarized in Figure 2-2, the annual growth of low-



density housing units has declined from 80 units annually over the 2006 to 2011 period to 50 units over the 2016 to 2019 period. Over the long-term planning horizon, it is anticipated that low-density housing supply opportunities within the B.U.A. will steadily diminish over time.

Figure 2-2
County of Wellington
Annual Housing Growth in the B.U.A. by Housing Unit Type^[1]
2006 to 2019



Note: Figure has been rounded.

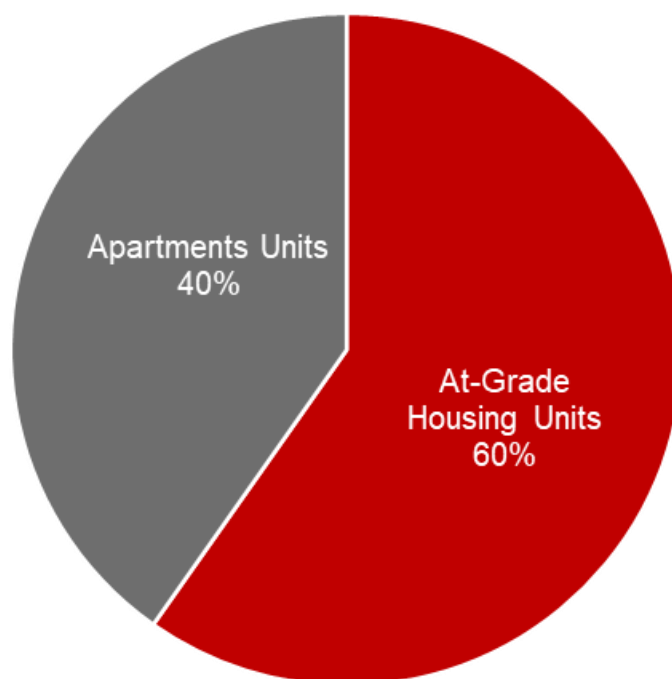
Source: Derived from County of Wellington Building Permit Activity by Watson & Associates Economists Ltd.

As summarized in Figure 2-3, at-grade housing (single detached, semi-detached and townhouses) represents a large portion (approximately 60%) of recent (2016 to 2019) housing development within the B.U.A. Looking forward, residential intensification is anticipated to steadily shift towards medium- and high-density housing forms.

^[1] Low-density units include single detached and semi-detached housing units. Medium-density units include townhouses. High-density units include apartments.



Figure 2-3
County of Wellington
New Housing Unit Activity within the B.U.A.,
2016 to 2019

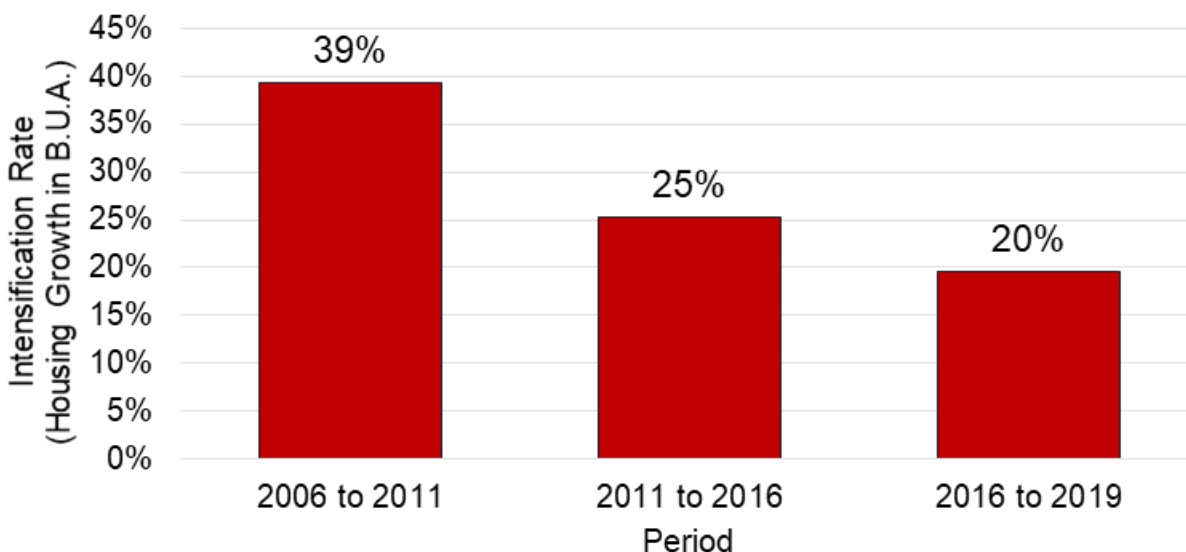


Note: At-Grade housing units include: single detached, semi-detached, row and townhouse units.
Source: Derived from County of Wellington Building Permit Activity by Watson & Associates Economists Ltd.

Figure 2-4 summarizes the housing intensification rate (the share of housing growth within the B.U.A.) for Wellington County since 2006. As summarized, the intensification rate decreased from 39% over the 2006 to 2009 period to 20% over the most recent period of 2016 to 2019. As previously discussed, the decline in the County's intensification rate is largely due to the diminishing supply opportunities of at-grade housing within the B.U.A.



Figure 2-4
County of Wellington
Intensification Rates, 2006 to 2019

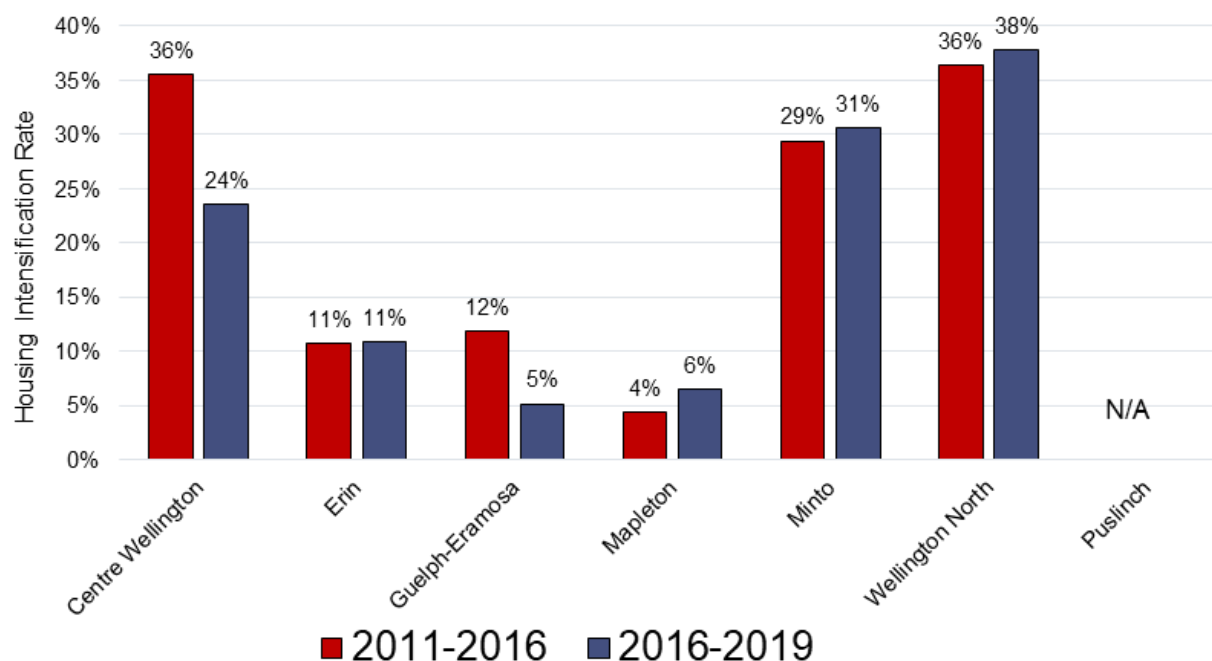


Source: Derived from County of Wellington Building Permit Activity by Watson & Associates Economists Ltd.

As shown in Figure 2-5, while the County has achieved its minimum 20% residential intensification target since 2006, intensification rates have varied by Area Municipality over the past decade. As previously noted, the Township of Puslinch is not included in the County's residential intensification target as it does not have defined Urban Centres with built boundaries. Wellington North, Minto and Centre Wellington achieved higher intensification rates compared to the County as a whole, while the remaining Area Municipalities achieved a significantly lower intensification rate than the County-wide average.



Figure 2-5
County of Wellington
Intensification Rates by Area Municipality,
2011 to 2016 and 2016 to 2019

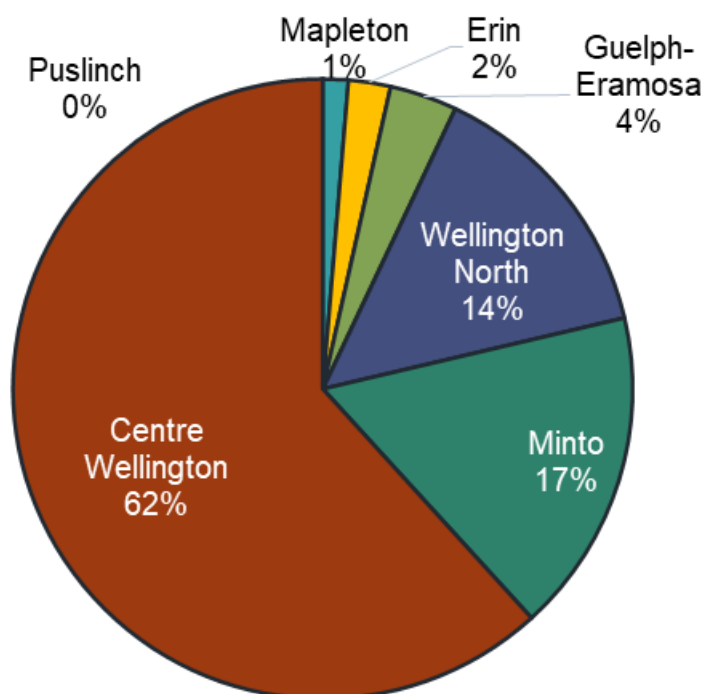


Source: Derived from the County of Wellington building permit activity by Watson & Associates Economists Ltd.

Figure 2-6 summarizes the share of housing growth by Area Municipality from 2016 to 2019 that contributes towards the County's housing intensification rate. As summarized, most of the County's intensification growth was concentrated in three Area Municipalities (Centre Wellington, Wellington North, and Minto). Centre Wellington contributed nearly two-thirds of the County's housing intensification growth over the 2016 to 2019 period.



Figure 2-6
County of Wellington
New Housing Unit Activity within the B.U.A.
by Area Municipality, 2016 to 2019



Source: Derived from the County of Wellington building permit activity by Watson & Associates Economists Ltd.

2.2.5 Summary of Residential Intensification Opportunities and Constraints by Primary Urban Centre

The following section provides a summary of factors that support, or do not support, the achievement of a 20% residential housing intensification target for Wellington County by Area Municipality.

Local Residential Intensification Rate Under 20%

The residential intensification rate is expected to be below 20% over the forecast period for the Area Municipalities of the Town of Erin, Township of Guelph-Eramosa, Township of Mapleton and Town of Minto for the following reasons:



Minto

- According to the Maitland Conservation Authority, the Urban Centre of Harriston features a significant flood hazard associated with the North Maitland River passing through the centre of the Town.^[1] A significant portion of this flood hazard impacts the existing B.U.A., largely residential areas.^[2] The Conservation Authority has advised that caution should be considered in applying an intensification rate to Harriston.
- The Palmerston Urban Centre also features some areas of flood hazard; however, according to the Conservation Authority this is not expected to impact Palmerston's capacity for intensification of the B.U.A. to the same extent as Harriston.^[3]
- Based on the flood hazards in Minto's larger Urban Centres of Harriston and Palmerston, a lower intensification rate is assumed compared to recent historical levels. The B.U.A. forecast assumes intensification opportunities will largely comprise A.R.U.s and development on vacant lots outside flood hazards. Redevelopment as a form of intensification is not anticipated for Harriston, and to a lesser extent, Palmerston.

Mapleton

- As previously summarized in Figure 2-5, Mapleton has achieved a very low rate of residential intensification over the past decade, averaging less than 10%. Furthermore, the B.U.A.s of the two Urban Centres (Drayton and Moorefield) in Mapleton are very small. Drayton, Mapleton's largest Urban Centre, has a land area of approximately +/- 65 ha within the B.U.A. (excluding Employment Areas and environmental features) and the central area of Drayton lies on land that is prone to flooding according to the Grand River Conservation Authority, which further reduces opportunity for residential intensification. Areas outside the flood

^[1] In 2017, the Township experienced devastating flooding approximating the 1:100-year flood event.

^[2] Maitland Conservation Authority Memo to County of Wellington in response to the County of Wellington M.C.R. Phase 1 Report, dated July 13, 2021.

^[3] Ibid.



hazard areas are largely towards the south and northwest areas of the Urban Centre.^[1]

- Moorefield is anticipated to accommodate 40% of Mapleton's housing intensification growth. It is important to recognize, however, given the availability of urban amenities in Moorefield, there are limitations regarding the amount of housing intensification that can be supported in Moorefield from a market demand perspective. Intensification opportunities are anticipated to primarily comprise A.R.U.s.

Erin

- The Town of Erin has two Urban Centres – Hillsburgh and Erin Village – that are anticipated to accommodate significant population growth over the planning horizon largely in greenfield areas. As a result, the ratio of residential intensification within the Town of Erin is anticipated to fall well below the 20% County-wide target; and
- The Town of Erin has limited planned wastewater capacity for intensification within the Urban Centres.

Guelph-Eramosa

- The Township of Guelph-Eramosa's only Urban Centre, Rockwood, is anticipated to reach its municipal servicing capacity (wastewater servicing) over the planning horizon. The residential intensification rate is largely to be determined by the Township's remaining municipal wastewater servicing capacity.

Local Intensification Rate at 20%

A forecast annual housing intensification rate of 20% is expected for the Township of Wellington North and the Municipality of Centre Wellington; however, increasing the intensification rate for these Area Municipalities to overcome the potential intensification shortfall for the municipalities summarized above is not considered appropriate. This is discussed further below.

^[1] Grand River Conversation Authority, Preparing for Flooding, A Guide for Residents of Drayton, retrieved online: https://www.grandriver.ca/en/our-watershed/resources/Documents/Flooding/Drayton_flooding2016.pdf, accessed February 14, 2021.



Centre Wellington

- Centre Wellington would be the most impacted by attempting to target a County-wide residential intensification rate of a 20%, as it has the highest rate of forecast population and housing growth. Within Centre Wellington, both Fergus and Elora/Salem have large concentrations of designated built heritage resources, which potentially limits supply opportunities for residential intensification. While opportunities remain to accommodate future residential intensification within the B.U.A.s of Fergus and Elora/Salem, Centre Wellington is not anticipated to exceed a local residential intensification rate of 20%.

Wellington North

- Mount Forest and Arthur are anticipated to accommodate a range of housing options on their respective B.U.A. and D.G.A. lands. A long-term residential intensification target of 20% has been identified for the Township of Wellington North.

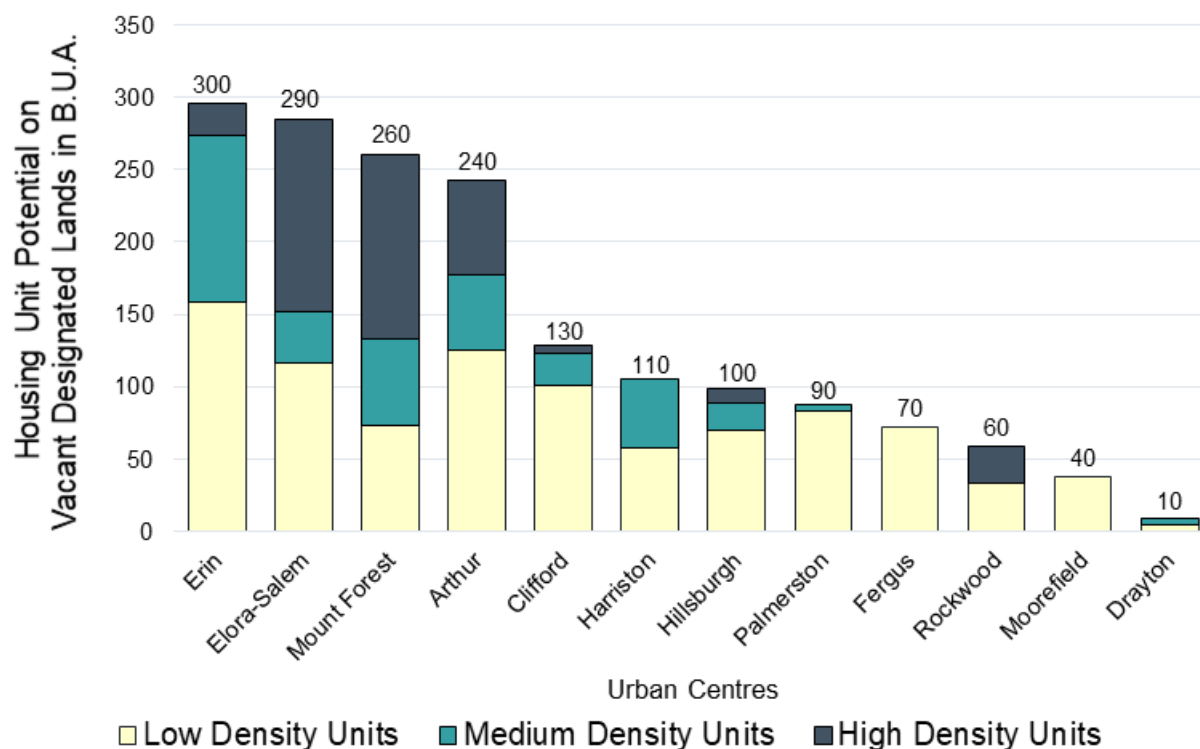
2.2.6 Housing Intensification Supply Potential by Primary Urban Centre

It is estimated that vacant designated lands within the B.U.A. have the potential to accommodate up to 1,690 housing units over the planning horizon. Identified vacant lands within the B.U.A. have the potential to accommodate up to 940 low-density units (single detached/semi-detached), 360 medium-density housing units (townhouse) and 390 high-density housing units (apartments). Figure 2-7 summarizes the housing unit potential in the B.U.A. by Urban Centre. It is important to note that the supply reflects housing opportunities as of mid-2019. Since 2019, the largest intensification project included Elora Mills (Little Folks Development) with approximately 130 housing units.

In addition to vacant land designated for residential use, the County has approximately 14 ha of land designated as Future Development within the B.U.A. with the potential to accommodate between 80 and 340 housing units, as summarized in Figure 2-8. The housing unit potential in the B.U.A., identified in Figure 2-7, excludes secondary units/accessory units, redevelopment and infill opportunities on developed lands. Further details including tables and maps of the vacant designated land supply are provided in Appendices A and B.



Figure 2-7
County of Wellington B.U.A.
Housing Supply Potential on Vacant Designated Residential Lands, 2019



Note: Supply is as of mid-2019. Supply has been rounded.
Source: Derived from the County of Wellington Land Supply Inventory and summarized by Watson & Associates Economists Ltd.

Figure 2-8
County of Wellington B.U.A.
Housing Supply Potential on Vacant Designated Future Development Lands, 2019

Urban Centre	Vacant Future Development Land Area in B.U.A., ha	Low Potential Housing Units	High Potential Housing Units
Arthur	2	10	180
Mount Forest	2	20	80
Drayton	1	10	50
Palmerston	1	10	30
Total	6	50	340

Notes: Low Potential based on 45% gross to net land area and 30 units per ha; and High Potential based on 45% gross to net and 65 units per ha.

Source: Watson & Associates Economists Ltd.

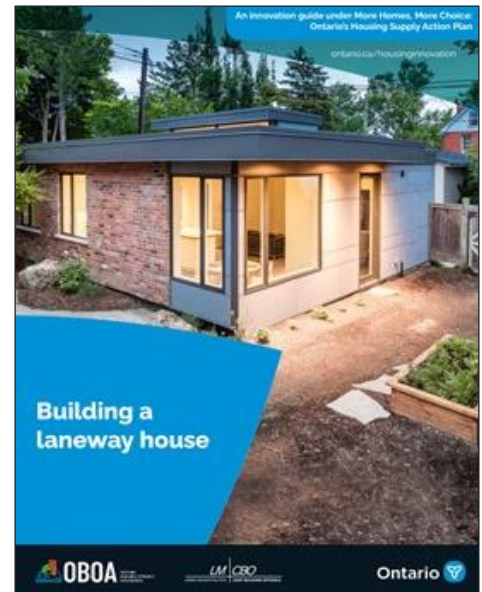


2.2.6.1 Additional Residential Unit Opportunities

Opportunities to accommodate future housing growth through A.R.U., including second units (e.g., units in basement or attic), laneway houses and accessory units (e.g., garage conversions to residential units) represent a key opportunity to increase housing supply and support intensification. The More Homes, More Choice: Ontario's Housing Supply Action Plan, 2019 and Bill 108, *More Homes, More Choice Act, 2019* emphasize affordable housing as a key priority for the Province. In accordance with the Act, municipalities are required to establish O.P. policies and zoning by-law provisions allowing second units in detached, semi-detached and row houses, as well as in ancillary structures.

In 2020, the County of Wellington updated the County's O.P. policies for A.R.U. through O.P.A. 112 to comply with section 16 (3) of the *Planning Act*. Revised O.P. policies now allow an A.R.U. in the eligible primary dwelling unit, as well as in an ancillary building to an eligible primary dwelling unit (subject to meeting criteria). The County's O.P. now allows up to two A.R.U.s, in addition to the primary dwelling unit, on eligible properties.^[1] Prior to O.P.A. 112, the County's O.P.A. 99 introduced secondary units; however, these were limited to an additional unit within a primary residence or a unit in a building ancillary to an eligible primary residence.

Wellington County's mature neighbourhoods are characterized by a significant share of low-density housing, conducive to the development of secondary units. A.R.U.s. offer an effective means to achieve intensification. As summarized in Figure 2-9, annual A.R.U. activity in the County has increased from 18 units annually over the 2011 to 2015 period, to 37 units annually over the 2016 to 2021



Building a Laneway House, An Innovation Guide Under More Homes, More Choices Ontario's Housing Supply Action Plan.



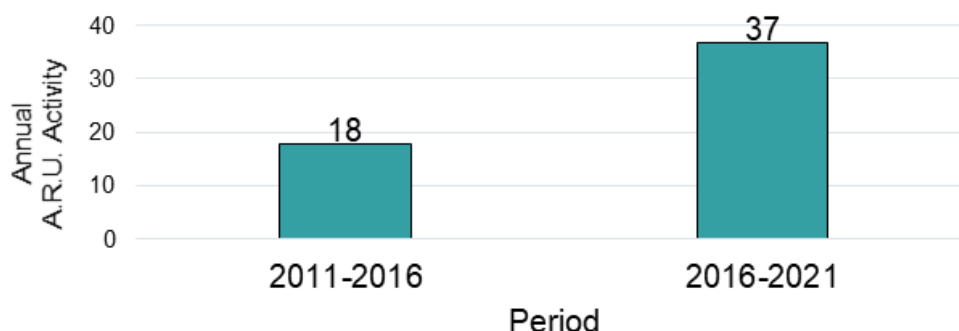
Adding a Second Unit in an Existing House, An Innovation Guide Under More Homes, More Choices Ontario's Housing Supply Action Plan.

^[1] County of Wellington Official Plan, policy 4.4.6., p. 40.



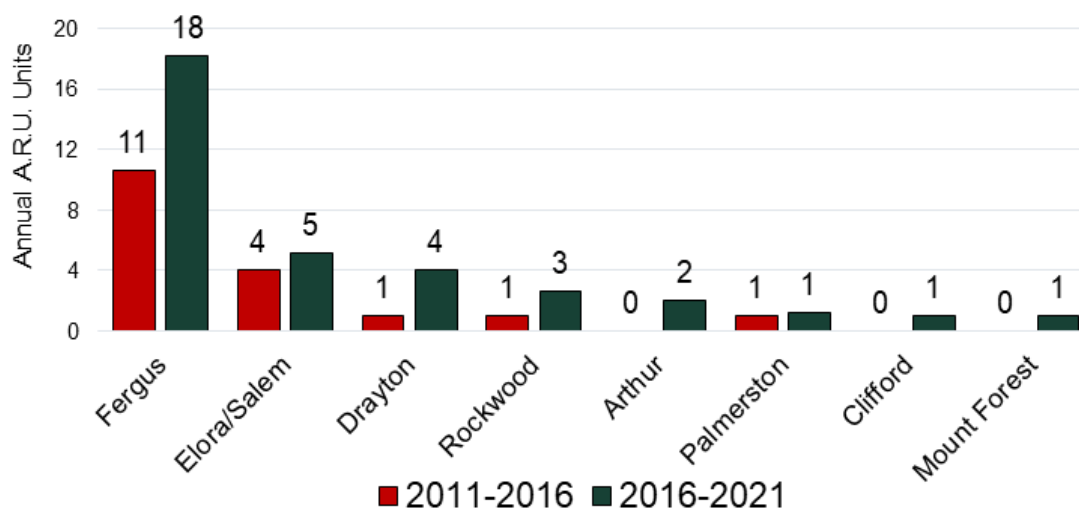
period. A.R.U. activity has primarily occurred in the County's urban centres. Figure 2-10 provides a summary of the A.R.U. activity in urban centres of the County.

Figure 2-9
County of Wellington
Annual Additional Residential Unit Housing Activity
2011 to 2021



Source: Derived from the County of Wellington data, excludes Garden Suites by Watson & Associates Economists Ltd.

Figure 2-10
County of Wellington
Annual Additional Residential Unit Activity by Urban Centre, 2011 to 2021

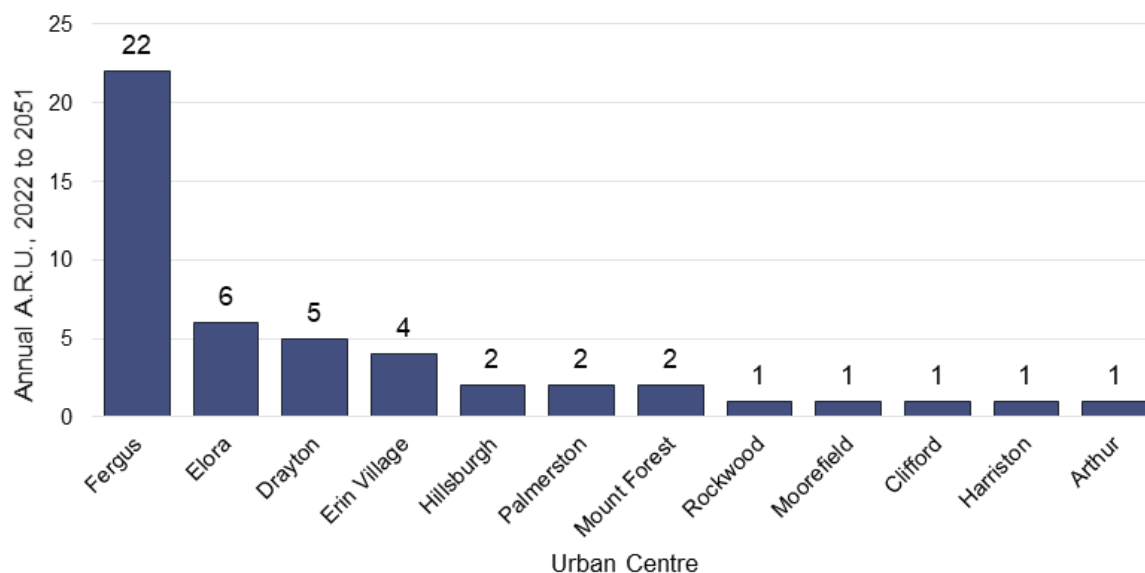


Note: Only Urban Centres with an A.R.U. activity averaging 1 unit annually included.
Source: Derived from County of Wellington data, excludes Garden Suites by Watson & Associates Economists Ltd.



An A.R.U. housing forecast has been prepared based on a review of recent A.R.U. activity in the County by Urban Centre. It is anticipated that the County will accommodate 48 A.R.U.s. annually in its Urban Centres over the 2022 to 2051 period. Most of the growth (at least 80% or 40 units annually) is anticipated to be accommodated in the B.U.A. It is important to note that A.R.U.s. have a high-density occupancy but are a grade-related housing form. For the purposes of forecasting land needs presented herein, all A.R.U.s are captured as high density. Figure 2-11 provides an A.R.U. forecast by Urban Centre. The A.R.U. forecast generally assumes that approximately 2% to 5% of the housing stock in the Urban Centres at 2051 will accommodate A.R.U.s.

Figure 2-11
County of Wellington
Annual Additional Residential Unit Forecast
by Urban Centre, 2022 to 2051



Note: Forecast is for B.U.A. and D.G.A. Refer to Appendix A for further details by policy area.
Source: Watson & Associates Economists Ltd.

2.2.6.2 Summary of Intensification Housing Potential in the B.U.A.

It is estimated that the County has the potential to accommodate **3,000 to 3,300 housing units** in the County's B.U.A. based on A.R.U. potential and vacant designated lands as of mid-2019. The estimated potential excludes redevelopment on existing



developed residential or mixed-use sites. Refer to Appendix A for a detailed table of the housing potential supply in the B.U.A. by Urban Centre.

2.2.7 Forecast Intensification Target by Area Municipality, 2022 to 2051

As previously noted, the County has a current residential intensification target of 20%. To achieve an intensification target of 20%, the County would need to accommodate 4,300 housing units within the B.U.A. over the 2022 to 2051 period. Based on a review of housing intensification potential, it is estimated that the County would need to exhaust all its intensification potential on vacant designated lands, as the potential for A.R.U. and opportunities on vacant designated lands total up to 3,200 units (adjusted estimate for the 2022 to 2051 period).^[1] It is important to recognize that not all sites identified in the B.U.A. may be available or developed over the planning horizon. As previously discussed, cultural heritage, floodplain and servicing issues have the potential to limit residential intensification opportunities on vacant lands and through redevelopment sites for some Urban Centres. Accordingly, it is recommended that the County request a lower residential intensification target of 15%.^[2]

A residential intensification target of 15% will require that the County accommodate at least 3,200 new housing units within B.U.A.s. between 2022 and 2051. This would likely require a modest amount of redevelopment, beyond what has been identified on vacant lands and through A.R.U. opportunities to recognize that not all vacant lands within the B.U.A. will likely be developed over the planning horizon.

Figure 2-12 summarizes the County of Wellington housing intensification targets by Area Municipality. The Township of Centre Wellington and the Township of Wellington North are anticipated to achieve an intensification rate of 20%, followed by Minto at 15%, Mapleton and Guelph-Eramosa at 12% and Erin at 7%. As previously noted, the Township of Puslinch does not have a B.U.A. Figure 2-13 provides the annual housing forecast within the B.U.A. by Area Municipality. As summarized, Centre Wellington is anticipated to accommodate 61 new housing units annually within the B.U.A., followed by Wellington North at 19 new housing units annually. Erin, Minto and Mapleton are anticipated to accommodate seven to 12 new housing units annually. Guelph-Eramosa,

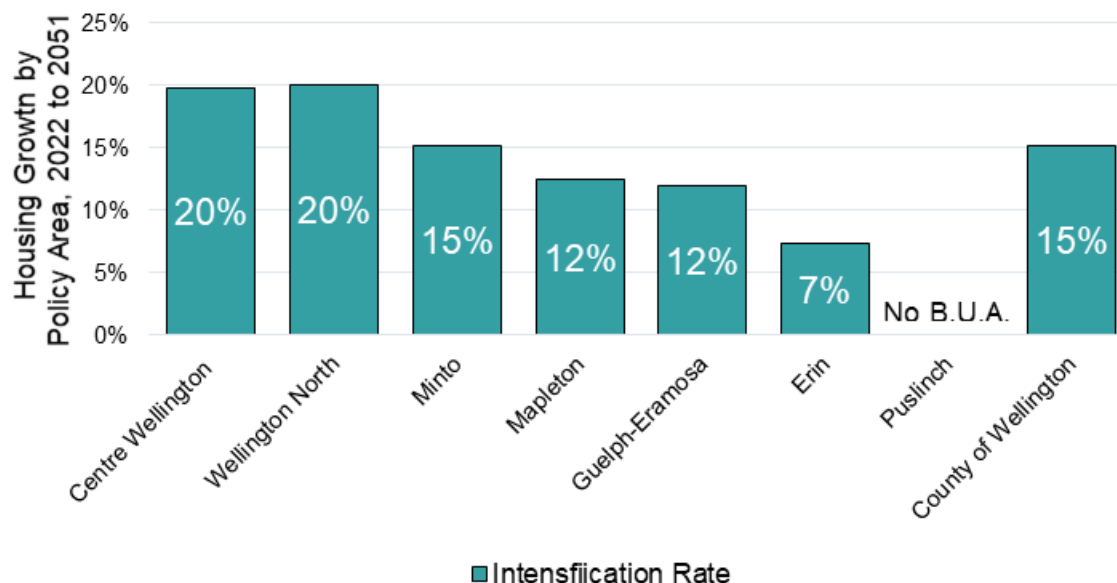
^[1] County of Wellington Official Plan, policy 4.4.6., p. 40.

^[2] Housing supply data was compiled as of mid-2019. Supply has been adjusted to reflect large redevelopment in Elora and updated A.R.U. activity.



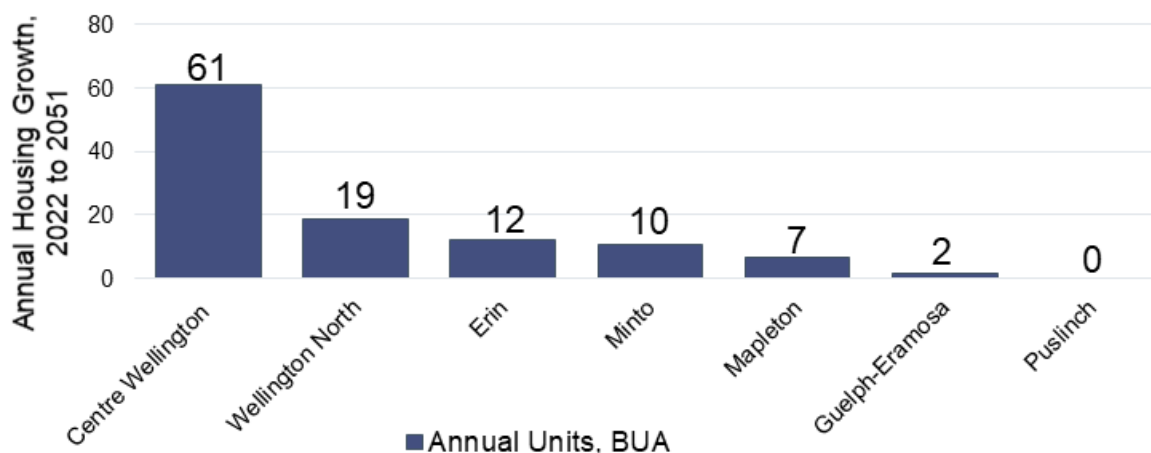
due to servicing constraints, is anticipated to accommodate only two new housing units annually within the B.U.A.

Figure 2-12
County of Wellington
Residential Housing Intensification Target by Area Municipality, 2022 to 2051



Source: Watson & Associates Economists Ltd.

Figure 2-13
County of Wellington
Annual Residential Intensification by Area Municipality, 2022 to 2051



Source: Watson & Associates Economists Ltd.



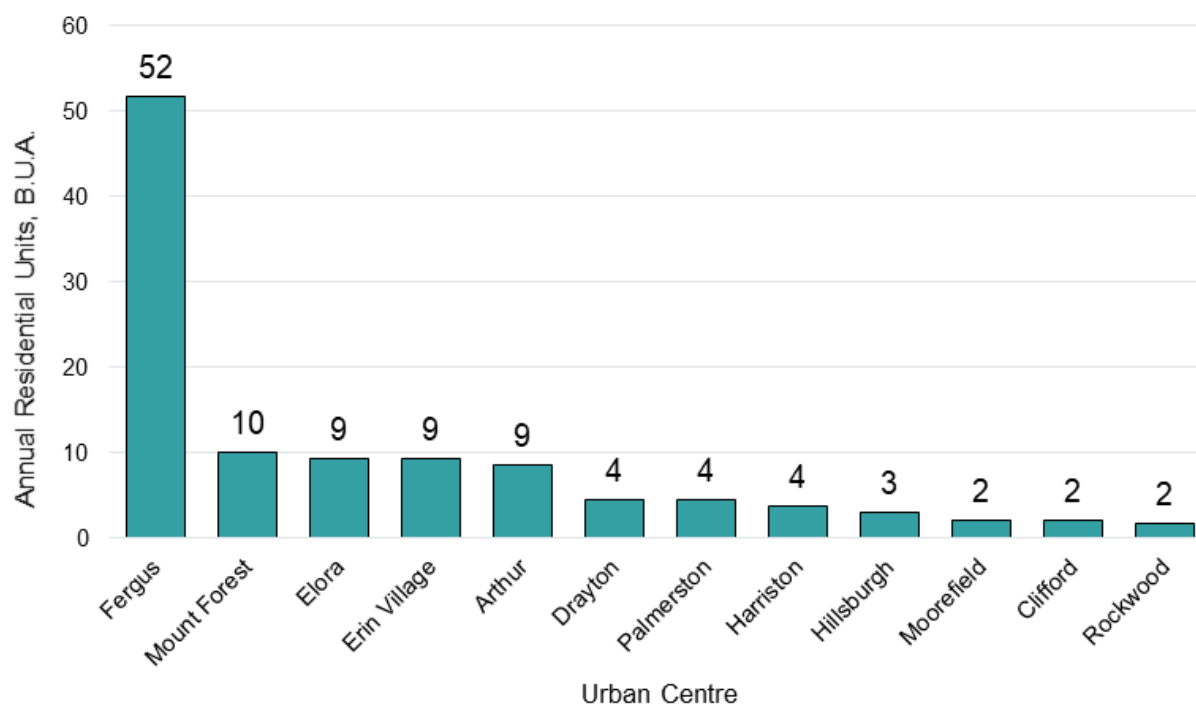
2.2.7.1 Intensification Forecast by Urban Centre, 2022 to 2051

Figures 2-14 and 2-15 summarize the County's housing intensification forecast by Urban Centre. Key highlights include:

- It is estimated that the Fergus Urban Centre will accommodate just under half (47%) the housing growth within the County's B.U.A. over the 2022 to 2051 forecast period. Of the County's Urban Centres, Fergus has the largest B.U.A. in terms of geographic land area. In addition to infill opportunities on vacant designated lands and through A.R.U.s, Fergus is anticipated to accommodate intensification within the B.U.A. through redevelopment and/or mixed-use development.
- Following the Fergus Urban Centre, the Urban Centres of Mount Forest, Erin Village, Elora and Arthur are anticipated to each accommodate 8% to 9% of the County's growth in the B.U.A. Vacant designated lands within these B.U.A.s have the potential to accommodate high-density housing growth as well as at-grade housing options (single detached/semi-detached and townhouses). Furthermore, it is estimated that A.R.U. opportunities can accommodate a share of the intensification potential within the B.U.A.s in these Urban Centres.
- The Urban Centres of Drayton and Palmerston are anticipated to each accommodate 4% of the County's growth in the B.U.A.s. Most of the housing intensification is anticipated to be accommodated through A.R.U. opportunities given the limited geographic size of the B.U.A.s and limited vacant designated lands within the B.U.A.s. As previously discussed, Drayton and Palmerston also have regulated floodplain constraints in the B.U.A.s.
- The remaining Urban Centres (Harriston, Clifford, Hillsburgh, Moorefield and Rockwood) are anticipated to accommodate less than 4% of the County's housing growth in the B.U.A.s. Except for the Clifford Urban Centre, which can accommodate a share of housing growth within the B.U.A. on vacant designated lands, the geographic areas of the B.U.A.s within these remaining Urban Centres are small and have limited opportunities for intensification. In addition, as previously discussed, Harriston and Rockwood have constraints to accommodate further growth (regulated floodplain constraints in Harriston and municipal servicing constraints in Rockwood).



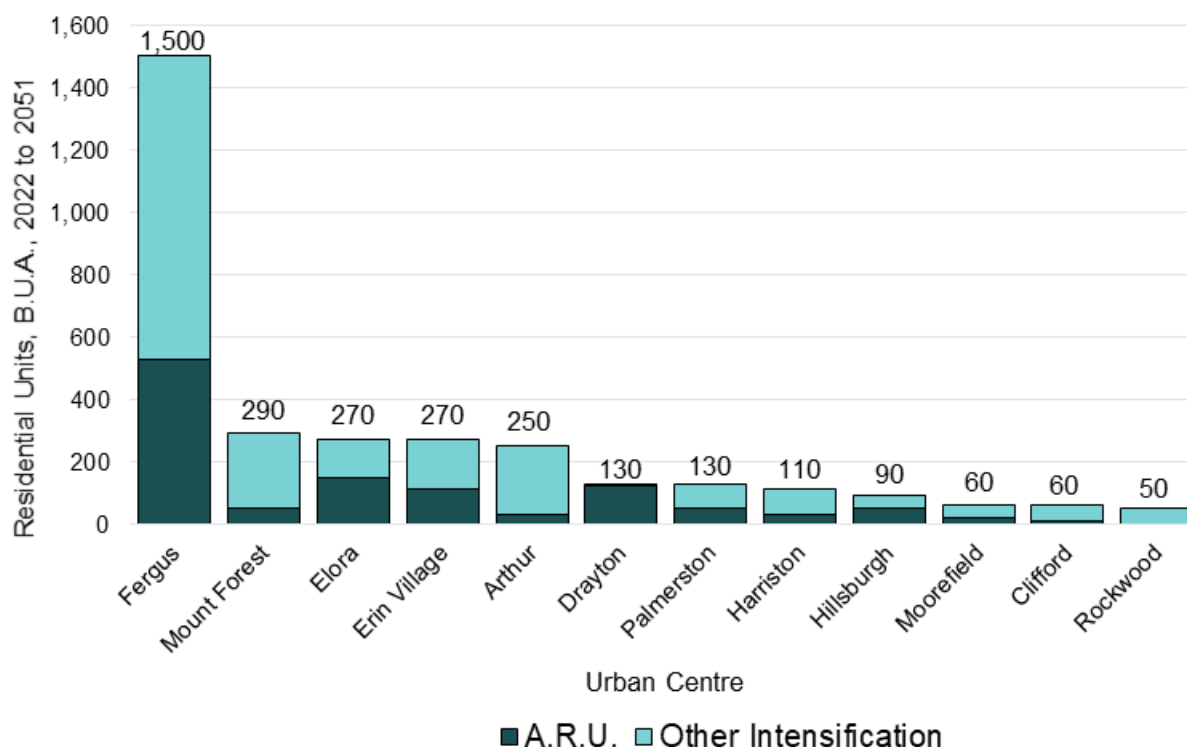
Figure 2-14
County of Wellington
Annual Housing Forecast in B.U.A. by Urban Centre
2022 to 2051



Source: Watson & Associates Economists Ltd.



Figure 2-15
County of Wellington
Total Housing Forecast in B.U.A. by Urban Centre
2022 to 2051



Source: Watson & Associates Economists Ltd.

Appendices A and B provide further details on the residential intensification, including supply maps and demand tables.

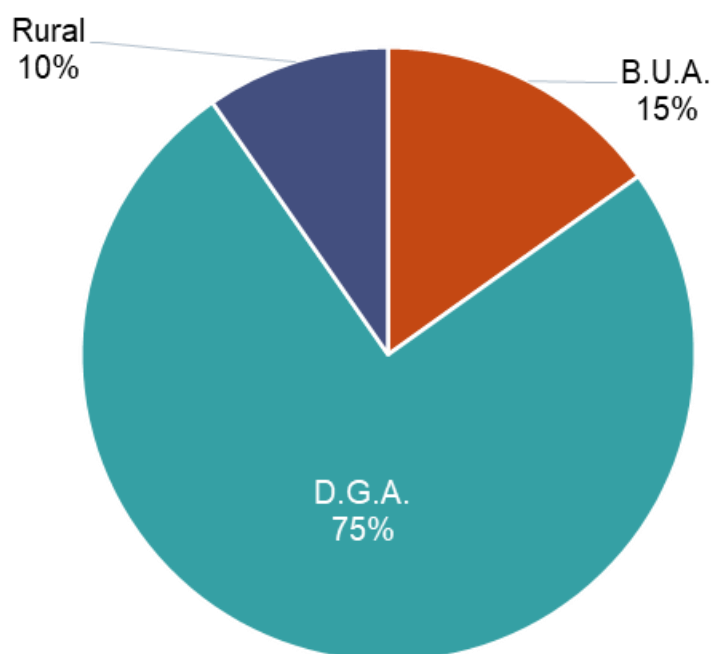
2.3 Population and Housing Allocation by Policy Area

2.3.1 Housing Forecast by Policy Area, 2022 to 2051

As previously discussed in section 2.2, it is forecast that the County's B.U.A. lands will accommodate 15% of forecast housing growth in Wellington County over the 2022 to 2051 forecast period. As summarized in Figure 2-16, the D.G.A. is anticipated to accommodate 75% of forecast housing growth, while the Rural Area is anticipated to accommodate the remaining 10% of future housing demand. Appendix A provides details on the residential housing forecast to 2051 by policy area.



Figure 2-16
County of Wellington
Housing Forecast by Policy Area
2022 to 2051



Source: Watson & Associates Economists Ltd.

2.3.2 Population Forecast by Policy Area at 2051

The County is anticipated to reach a population of 55,200 in the D.G.A. by 2051, followed by a population of 53,000 in the Rural Area and a 51,700 population in the B.U.A. The D.G.A. is estimated to have an existing population of 7,300 as of mid-2019 (approximately 2,600 housing units). Over the 2020 to 2051 period, the D.G.A. is anticipated to add 49,000 persons, or approximately 1,600 persons annually.

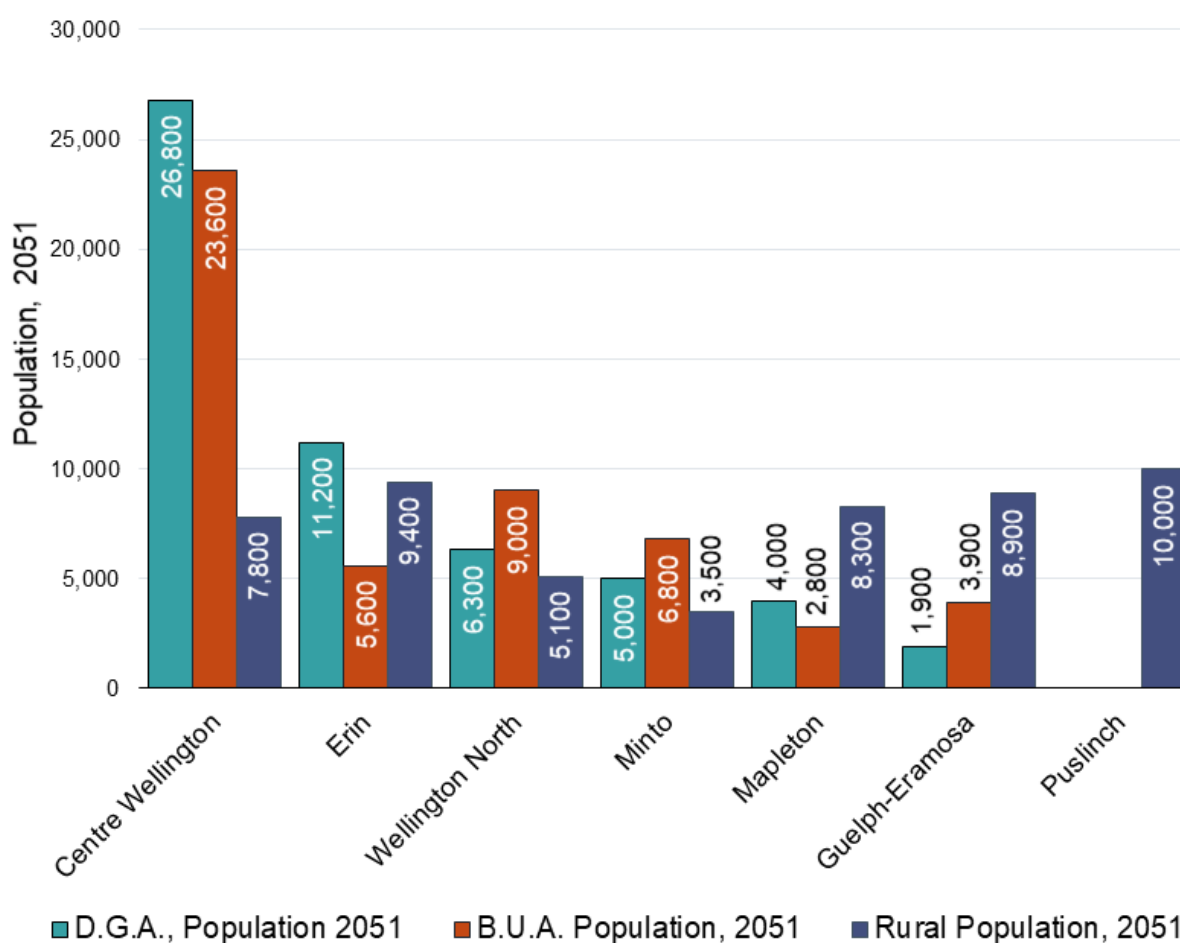
Figure 2-17 provides a summary of the forecast 2051 population by policy area (B.U.A., D.G.A. and Rural Area) and by Area Municipality. Key findings include the following:

- By 2051, the largest share of population within Centre Wellington and Erin is anticipated to be concentrated in the D.G.A. (46% and 43% of respectively).
- In contrast, for Wellington North and Minto most of the population by 2051 is anticipated to be concentrated in the B.U.A.



- For Mapleton, the population base continues to be concentrated in the Rural Area, however, steady population growth is anticipated on D.G.A. lands.
- Guelph-Eramosa's population base is anticipated to remain concentrated in the Rural Area by 2051.
- Puslinch does not have a B.U.A. and D.G.A. and, as result, the entire population base is located within the Rural Area.

Figure 2-17
County of Wellington
Population Forecast by Policy Area, 2051



Source: Watson & Associates Economists Ltd.

Appendix A provides details on the population forecast to 2051 by policy area.

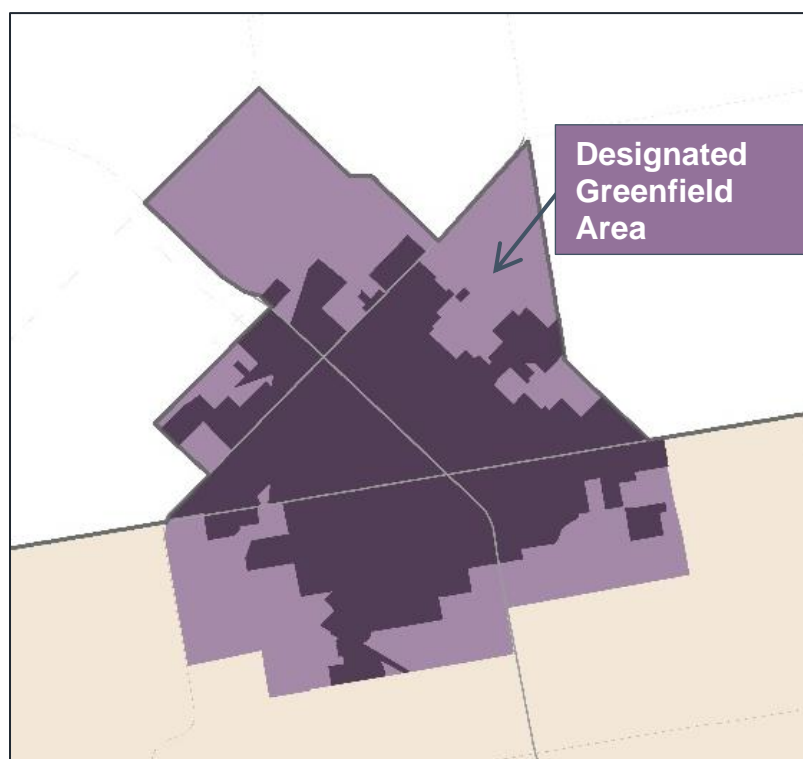


2.4 Designated Greenfield Area Land Supply

2.4.1 What is the D.G.A.?

The D.G.A. is defined as the area outside the delineated built boundary within the urban boundary of an Urban Settlement Area. As previously discussed, the built boundary was delineated by the Province based on the extent of lands in an Urban Settlement Area that were primarily developed as of 2006. Using the Mount Forest Urban Centre as an example, Figure 2-18 identifies the D.G.A.

Figure 2-18
County of Wellington
D.G.A. Example (Mount Forest Urban Centre)



Source: County of Wellington Planning Department.

The D.G.A. is further refined based on Community Area and Employment Area, as previously discussed. The Community Area includes all lands within the settlement boundary excluding Employment Areas. The Community Area land needs are based on the D.G.A. land area, excluding Employment Areas.



2.4.2 D.G.A. Land Supply Methodology

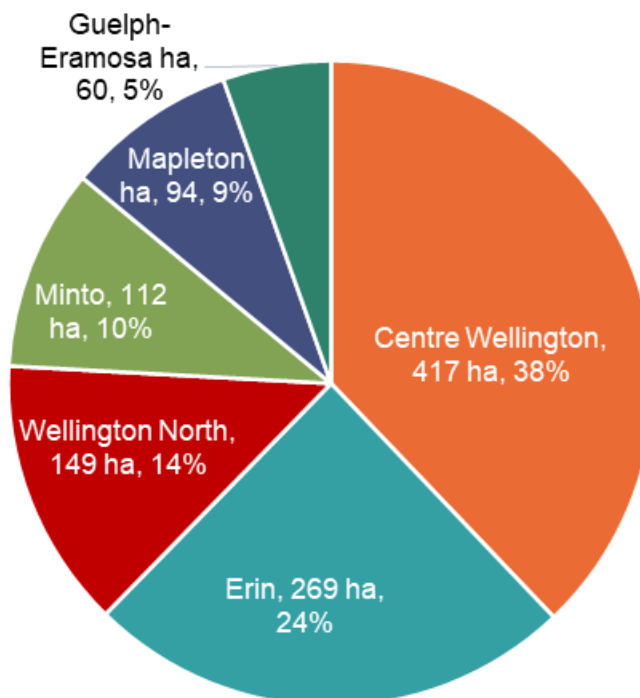
The provincial L.N.A. methodology requires an assessment of land needs be carried out based on the calculation of the total D.G.A. gross developable land area in accordance with the Growth Plan, 2019. The first step in calculating the D.G.A. land supply is to identify the total gross developable land within the Community Area D.G.A., as well as lands that support the function of this area, including non-residential lands, e.g., lands that accommodate population-related employment (P.R.E.), local roads, parks/trails, recreational lands/facilities and local infrastructure (e.g., stormwater ponds). Environmental features identified in the County's mapping are excluded from the land supply. Other exclusions include the land area accommodating highways, utility corridors and cemeteries, as these land features support the broader area. County of Wellington geographic information systems (G.I.S.) data was utilized to calculate the land supply.

It is important to recognize that the D.G.A. land supply includes developed and vacant lands and, therefore, requires an analysis to determine the total amount of population and jobs the D.G.A. can accommodate at its fully developed state or by 2051. The people-and-jobs density is a key component in determining the yield of population and employment the D.G.A. can support by 2051.

The County has approximately 1,100 ha of D.G.A. lands that are currently designated in the O.P. for residential and P.R.E. uses (excludes lands designated as Future Development in the O.P.). Of this total, approximately 38% of the land supply is within the Township of Centre Wellington, as summarized in Figure 2-19. The Town of Erin represents just over a quarter of the D.G.A. land supply, followed by the Township of Wellington North at 14% and the Town of Minto at 10%. The Township of Mapleton and Guelph-Eramosa represent 9% and 5%, respectively, of the County's D.G.A. land supply.



Figure 2-19
County of Wellington
D.G.A. Land Supply by Area Municipality



Source: Watson & Associates Economists Ltd.

Mapping of the D.G.A. lands is provided in Appendix C.

2.4.3 D.G.A. Land Supply by Status

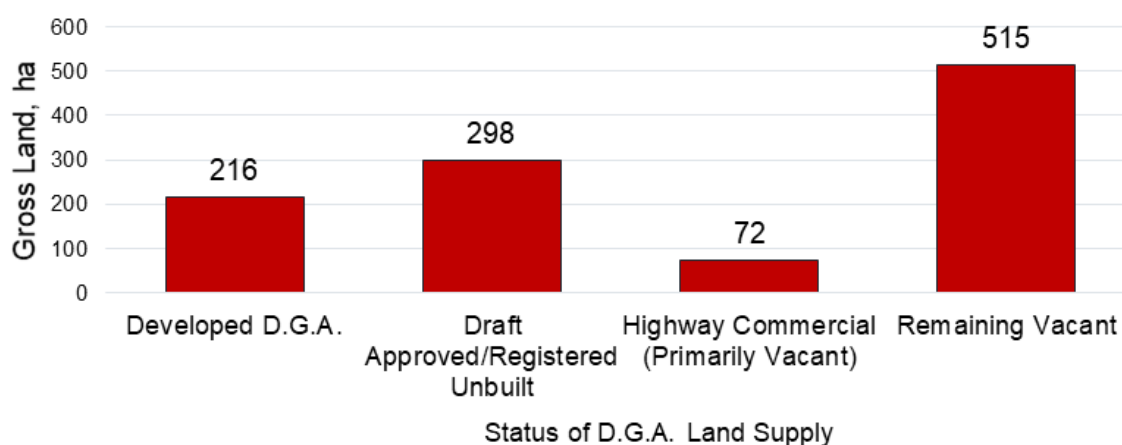
Figure 2-20 provides a summary of the D.G.A. land supply by status, while Appendix C provides detailed mapping of the D.G.A., identifying the approximate land area of the D.G.A. in large blocks. This analysis was carried out in mid-2019, based on a comprehensive review of building permit data and active residential development applications. Again, it is important to note that the L.N.A. is based on total designated land area and total people and jobs at 2051; therefore, updating the base to reflect new growth and development is not necessary. This analysis is used primarily to understand population and employment density.

As identified in Figure 2-20, approximately 216 ha or 20% of the D.G.A. is developed, while 297 ha or 28% of the land area is anticipated to accommodate approved/draft approved developments in the short term. The remaining D.G.A. lands include Highway



Commercial sites (primarily vacant) and remaining vacant D.G.A. lands, which provide an opportunity to achieve the average density levels across the D.G.A.

Figure 2-20
County of Wellington
D.G.A. Land Supply as of Mid-2019



Note: Net of applicable take-outs in accordance with the Growth Plan, 2019.
Source: Watson & Associates Economists Ltd.

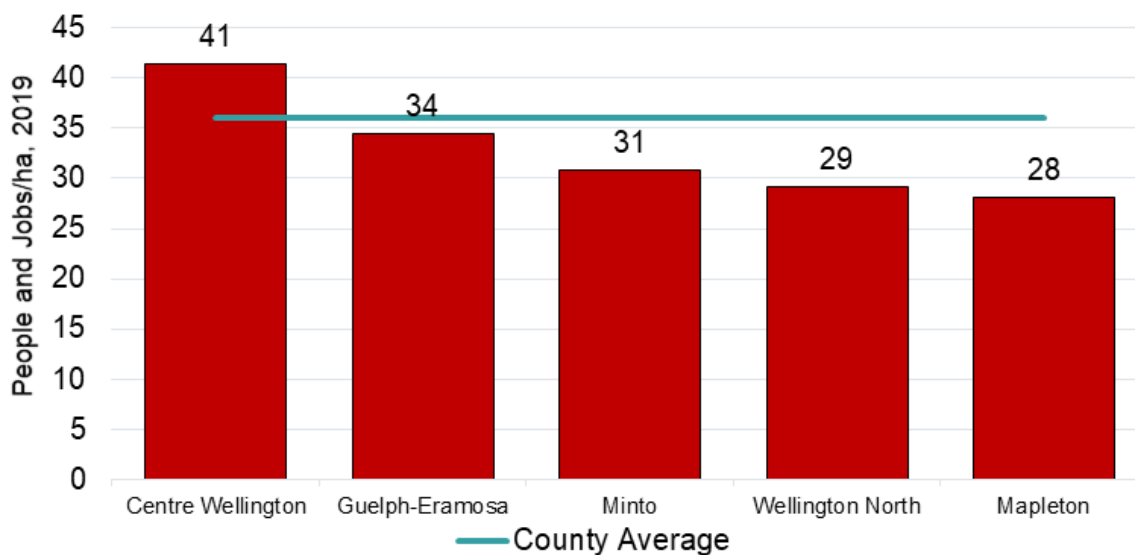
2.4.4 Developed D.G.A. Lands

2.4.4.1 Average D.G.A. Community Area Density by Area Municipality and Urban Centre

As previously mentioned, approximately 216 gross ha of D.G.A. lands within the County are developed. Developed D.G.A. lands accommodate approximately 7,800 people and jobs and generate an average density of 36 people and jobs/gross ha. Average density ranges from 28 to 41 people and jobs/ha in the D.G.A. by Area Municipality, as summarized in Figure 5-21a. Centre Wellington, with an average 41 people and jobs/ha, is the only Area Municipality in the County achieving a people and jobs density higher than the Growth Plan, 2019 target of 40 people and jobs/ha. Figure 5-21b provides a summary by Urban Centre. Fergus has the highest density at 42 people and jobs/ha. Average density levels in the remaining Urban Centres range from 28 people and jobs/ha to 40 people and jobs/ha. Due to limited residential development on developed D.G.A. lands, an average density is not provided for the Urban Centres of Erin Village and Hillsburgh in the Town of Erin. Appendix C provides further details on the developed D.G.A., including population, housing, employment and land area.



Figure 2-21a
County of Wellington
D.G.A. Community Area Density as of Mid-2019 by Area Municipality

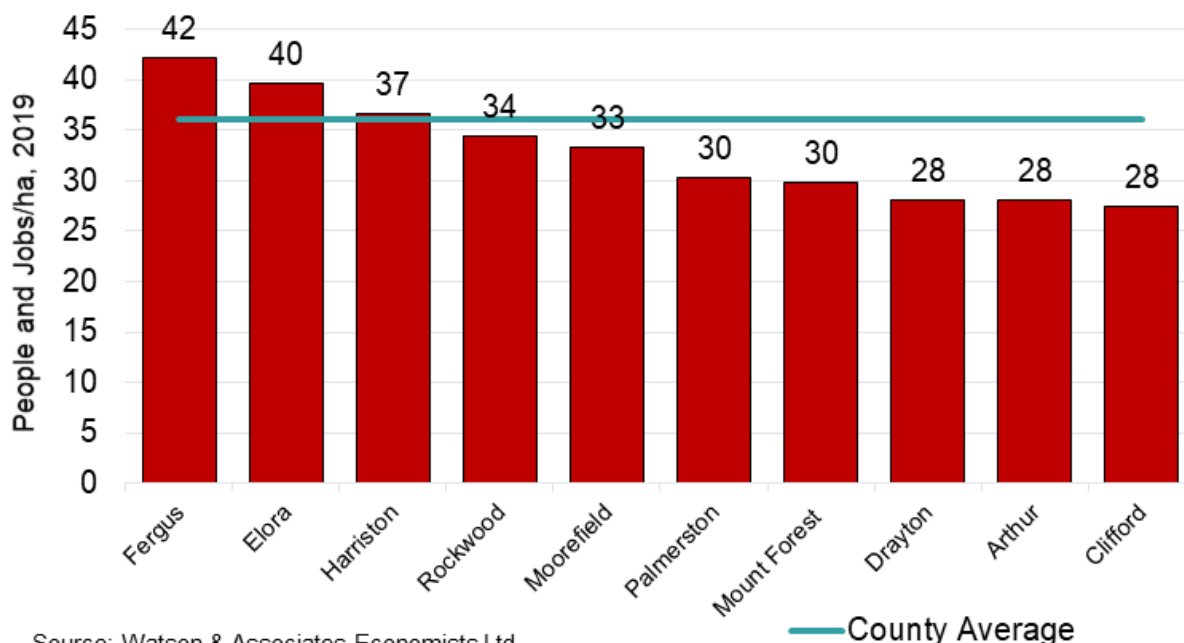


Note: Due to the sparse development and a large recreational site in the D.G.A., the Town of Erin is excluded.

Source: Watson & Associates Economists Ltd.



Figure 2-21b
County of Wellington
D.G.A. Community Area Density as of Mid-2019 by Urban Centre



2.4.4.2 Average D.G.A. Community Area Density Examples

Figure 2-22 provides an example of a residential new development within D.G.A. lands in Fergus with a high density (42 people and jobs/ha). As illustrated, the neighbourhood offers a wide range of housing options, including apartments (39%), townhouses (32%) and single detached units (29%). The neighbourhood includes a stormwater pond, parks and trails which are included in the density calculation. This neighbourhood yields an average density of 25 housing units per gross ha.



Figure 2-22
County of Wellington
Fergus – Tower St. S./McQueen Blvd.
D.G.A. Density Example



Source: Watson & Associates Economists Ltd. Imagery Source: Google Earth.

Figure 2-23 provides another example of a low-density residential development on D.G.A. lands in Arthur with an average density of 26 people and jobs/ha. As illustrated, this neighbourhood offers single detached dwellings exclusively on large lots. This neighbourhood yields an average density of 9 housing units per gross ha.

These examples are generally characteristic with the density range of new neighbourhoods across the greenfield areas within the County's Urban Centres. As discussed later in this chapter, it is anticipated over the planning horizon that housing options within Urban Centres will broaden by structure type and built form contributing towards higher average housing and population densities.



Figure 2-23
County of Wellington
Arthur – Carroll St./Schmidt Dr.
D.G.A. Density Example



Source: Watson & Associates Economists Ltd. Imagery Source: Google Earth.

2.4.4.3 County of Wellington O.P. Density Policies

The County of Wellington O.P. requires that new developments achieve an overall greenfield density target of 40 persons and jobs/ha. A policy framework is provided in the O.P. to encourage increase densities and a broader mix of housing, including encouraging the introduction of medium-density housing types in new subdivisions. The County requires that development in the D.G.A. strive to attain at least 16 units per gross ha (6.5 units per gross acre) in newly developing subdivisions. Furthermore, the County encourages approved but undeveloped plans of subdivision to consider revisions that add additional housing units in appropriate locations.^[1]

Currently, Wellington County is averaging approximately 13 housing units per gross ha on developed D.G.A. lands. On a net land area basis, which includes only the land area of residential lots, the average housing density is 21 units per net ha for low-density

^[1] County of Wellington O.P., policy 4.4.4, p. 39.



housing units and 37 units per net ha for medium-density housing. Due to the limited number of built high-density developments in the D.G.A., a current average housing density is not available.

As summarized in Figure 2-24, the Fergus Urban Centre has the highest current housing density at 15 units per gross ha, which results in an overall average density of 42 people and jobs/ha. Within Fergus, D.G.A. developments range from 10 units to 27 units per gross ha. Developments with the highest units per ha are typically developments with a greater share of high-density units and/or a relatively smaller share of land dedicated to public space (e.g., parks). It is important to recognize that the gross developable land area of the D.G.A. may include a range of other uses and features that influence the density, including parkland and trails, schools, commercial development, local roads and internal infrastructure.

Appendix E provides background information on the housing units per ha and Community Area land needs assessment assumptions. It is important to recognize that D.G.A. developments to date in Wellington County have primarily consisted of residential uses with limited other Community Area uses. Over the forecast period, it is anticipated that other Community Area uses, including institutional and commercial uses will be required in the D.G.A. and as result will bring down the average of units per gross ha, despite a higher people and jobs density anticipated. Furthermore, the current developed D.G.A. is more representative of D.G.A. development activity in Fergus, Elora and Rockwood urban centres. Area Municipalities in the northern Municipalities (Mapleton, Wellington North and Minto) which generally have a lower density are anticipated to represent a larger share of D.G.A. development over the forecast horizon and have a greater weighting over the County's density average.



Figure 2-24
County of Wellington
Average Housing Units Per Gross ha by Urban Centre, as of 2019

Urban Centre	Housing Units	Land Area, ha	People and Jobs Density	Units Per Gross ha
Fergus	1,200	80	42	15
Elora	410	32	40	13
Moorefield	4	0.3	33	13
Clifford	50	4	28	13
Harriston	40	3	37	13
Palmerston	80	7	30	12
Rockwood	530	47	34	11
Drayton	160	15	28	11
Erin Village	10	1	30	10
Arthur	70	8	28	9
Mount Forest	120	14	30	9
Total	2,670	210	37	13

Note: Hillsburgh is excluded since the developed D.G.A. includes primarily recreational lands.
Source: Watson & Associates Economists Ltd.

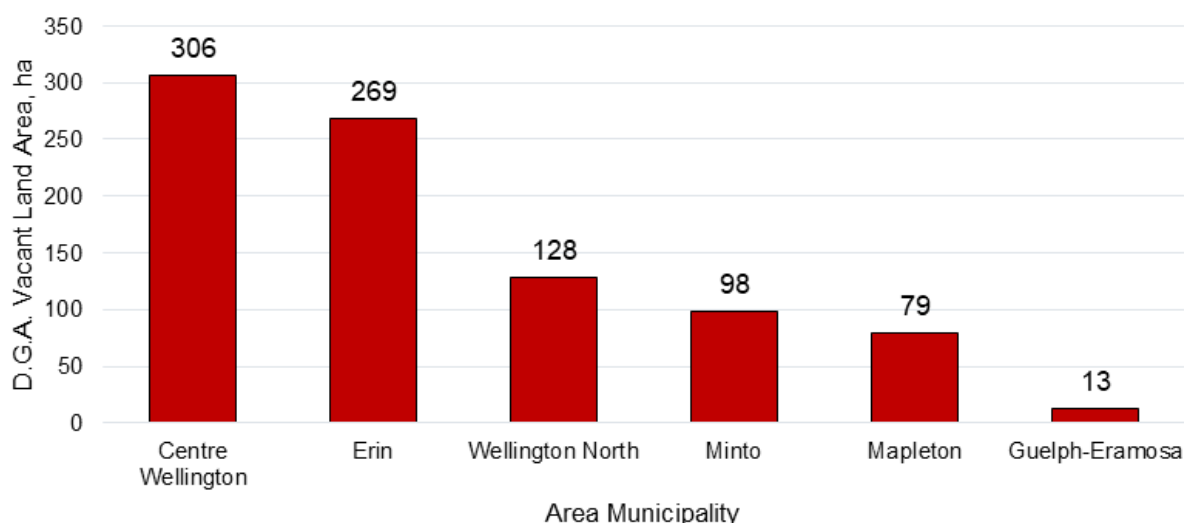
2.4.5 Vacant D.G.A. Lands

As summarized in Figure 2-25, the County has approximately 893 ha of vacant D.G.A. Community Area lands. The Township of Centre Wellington represents just over a third (34%) of the County's vacant D.G.A. land supply, followed by the Town of Erin at 30% and the Township of Wellington North at 14%. The Town of Minto and the Township of Mapleton represent 11% and 9% of the County's vacant D.G.A. land supply. The D.G.A. in Guelph-Eramosa (Rockwood Urban Centre) is nearly built out with only 13 ha of vacant D.G.A. land remaining and represents a very small portion of the vacant D.G.A. land supply in the County.

As previously discussed, the majority of the D.G.A. land in the Town of Erin is vacant, as there are only a few lots developed as of mid-2019. Except for Guelph-Eramosa, less than a third of the D.G.A. land area in each Area Municipality is developed.



Figure 2-25
County of Wellington
Vacant D.G.A. Lands as of Mid-2019 by Area Municipality



Source: Watson & Associates Economists Ltd.

2.4.6 Approved Development in the D.G.A.

As of mid-2019, it is estimated that approved developments in the D.G.A. have the potential to accommodate approximately 4,300 housing units. The housing mix of approved developments in the D.G.A. is comprised of 63% low-density units, 28% medium-density units and 9% high-density units. Refer to Appendix C, for a summary of the housing potential for approved (draft approved and registered unbuilt) housing developments in the D.G.A. by Urban Centre.

Over the 2019 to 2051 forecast period, it is anticipated the D.G.A. will accommodate approximately 17,100 housing units that will provide a range of housing options within the County's Urban Centres. As a result, approximately 12,800 housing units are required in addition to the housing unit supply potential identified in approved housing developments, as summarized in Figure 2-26. These housing units will be accommodated on remaining designated vacant lands, redesignated Future Development lands and on S.A.B.E. lands, if required.



Figure 2-26
County of Wellington
D.G.A. Comparison of Draft Approved/Registered Unbuilt Housing Forecast
and D.G.A. Housing Forecast to 2051

Approved Supply and Forecast	Low-Density Housing Units	Medium-Density Housing Units	High-Density Housing Units	Total Housing Units
Draft Approved/Registered Unbuilt	2,720	1,200	380	4,290
D.G.A. Forecast, 2019 to 2051	12,300	3,540	1,240	17,090
Additional D.G.A. Units Required	9,580	2,340	860	12,800

Note: Figure has been rounded.

Source: Watson & Associates Economists Ltd.

Based on a review of development and approved/draft approved D.G.A. lands, the County is anticipated to reach an average density of 40 people and jobs/ha, as summarized in Figure 2-27. This represents approximately 47% of the total D.G.A. land area. Developed and approved D.G.A. lands are anticipated to accommodate approximately 7,000 housing units and a people and jobs base of 20,400 by 2051. Appendix C provides further details on the draft approved/registered unbuilt housing activity.

Figure 2-27
County of Wellington
D.G.A. Density – Developed and Approved

Developed and Draft Approved/Registered Unbuilt	Low-Density Units	Medium-Density Units	High-Density Units	Total Housing Units	People and Jobs	Land Area, ha	People and Jobs Density
Developed as of 2019	1,858	536	273	2,670	7,800	216	36
Draft Approved/Registered Unbuilt	2,720	1,200	380	4,290	12,600	298	42
Developed and Draft Approved/Registered Unbuilt	4,578	1,736	653	6,960	20,400	514	40

Note: Totals may not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



2.4.7 Future Development Lands

In addition to designated residential and highway commercial lands in the D.G.A., the County has the opportunity to redesignate lands currently identified as Future Development in the County's O.P. for Community Area or Employment Area use.

Future Development lands are lands that may not be required over the planning period, or the specific nature of the intended land uses requires further review. The purpose of the Future Development designation, as noted in the County's O.P., is to provide the orderly future development of unbuilt areas in the Urban Centre, which requires an O.P.A., including a proper site plan or concept, and that municipal services can be accommodated to the area prior to the approval of development.^[1] The County's M.C.R. is an opportunity to review the County's designated land supply comprehensively. Summarized below is policy 8.10.4, which sets out the redesignation requirements of Future Development areas in the County of Wellington O.P.:

“Development within the Future Development areas will be limited and restricted to ensure that premature provision of municipal services will not be required. Redesignation of these lands may be considered if it is proven that additional land for development purposes is required. A comprehensive review of the need and impacts of developing this land on the surrounding area shall be undertaken with regard for the following:

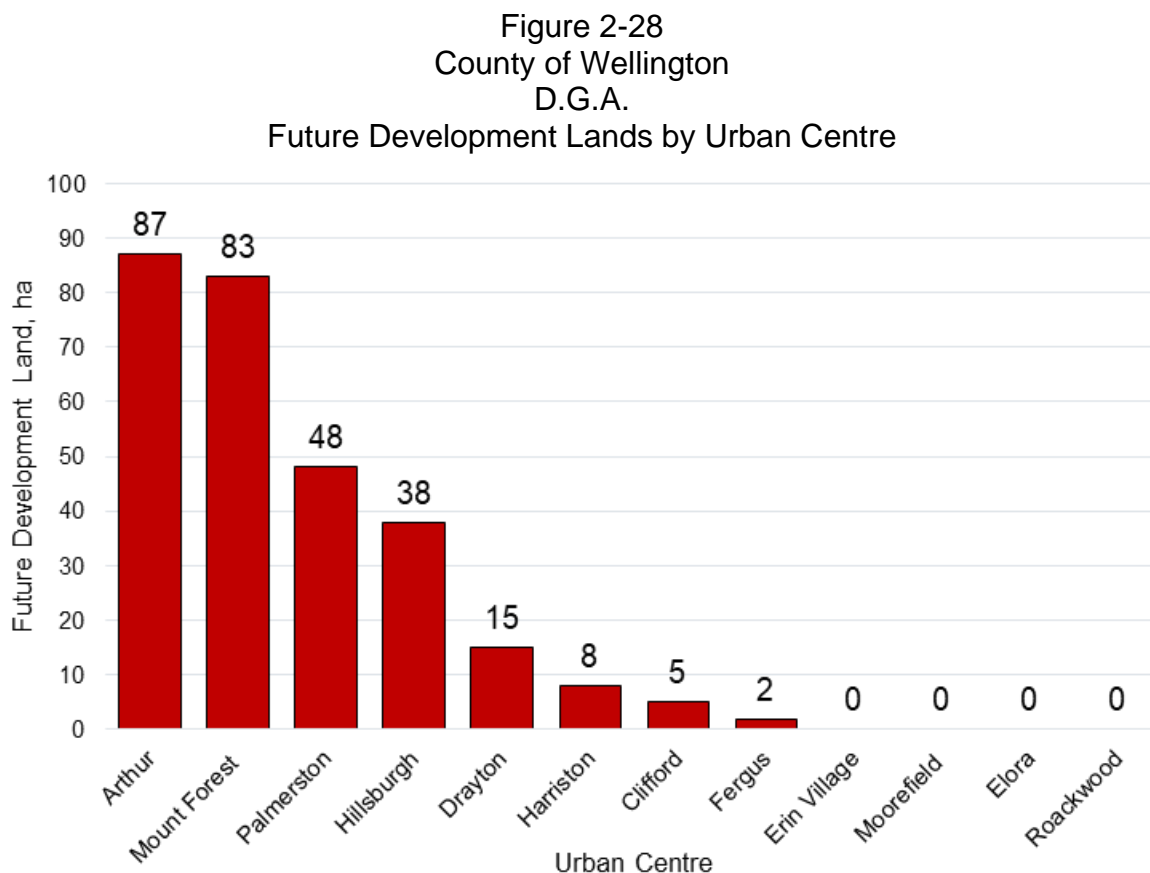
- a) that a need for additional land is demonstrated by the fact that approximately three quarters of the land designated for development by this Plan are already developed;
- b) that services of all kinds are or can be reasonably and economically provided to the proposed development;
- c) that adequate development plans which indicate the type of development and facilities to be provided (such as, streets, schools, parks and shopping facilities) are or will be made available to the municipality;
- d) that the proposed development is contiguous to and is a logical extension of existing development; and
- e) any required impact studies have been completed.”^[2]

^[1] County of Wellington Official Plan, policy 8.10.2, p. 113.

^[2] Ibid., policy 8.10.4, p. 113.



The County has approximately 286 ha of Future Development lands in the Urban Centres. The majority of these lands is concentrated in the Urban Centres of Arthur, Mount Forest, Hillsburgh and Palmerston, as summarized in Figure 2-28. Mapping of Future Development lands by Urban Centre is provided in Appendix C.



Note: Adjustments have been made to the supply to account for sites that are constrained and/or likely undevelopable over the planning horizon. Future Development lands in South Fergus are captured in the designated land inventory for the purposes of the L.N.A. based on the proposed land use designations in the Township of Centre Wellington O.P.

Source: County of Wellington Vacant Land Inventory.

For the purposes of this L.N.A., Future Development lands are factored in the Community Area land needs assessment (except for approximately 2 ha in Fergus) upon the assessment of the designated lands in the Urban Centres. If additional designated lands are required in the Urban Centres' Community Area, future development lands are applied first to accommodate shortfall of Community Area designated land area. An S.A.B.E. is considered for Community Area uses if there is



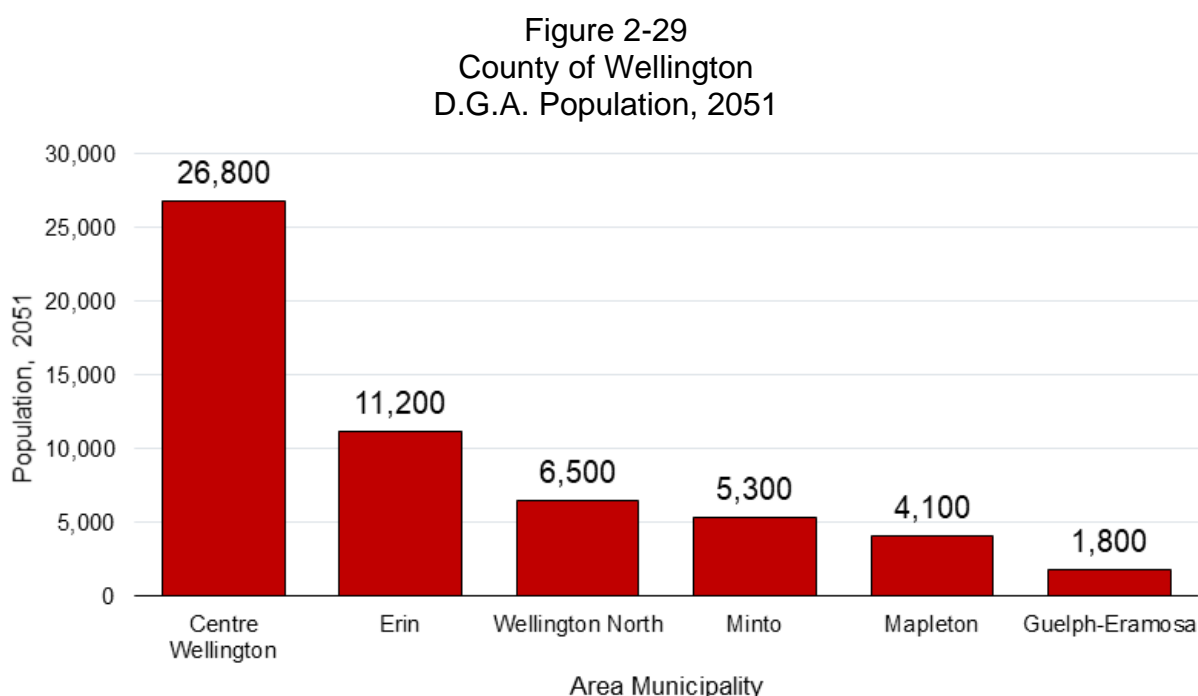
not enough Future Development lands to accommodate the shortfall of designated lands in the Community Area.

2.5 D.G.A. Land Needs

2.5.1 Summary of D.G.A. Population and Housing Growth to 2051

Figures 2-29 and 2-30 summarize the population and housing forecast for the D.G.A. by Area Municipality. Key highlights include:

- The D.G.A. is anticipated to add 48,500 persons by 2051 and is anticipated to reach a total population of 55,700 and 19,800 households; and
- Just under one-half (48%) of the County's D.G.A. population base is anticipated to be accommodated within the Township of Centre Wellington.



Source: Watson & Associates Economists Ltd.



Figure 2-30
County of Wellington
D.G.A. Population and Housing to 2051

Area Municipality	D.G.A. Population Growth, 2019 to 2051	D.G.A., Population 2051	D.G.A. Units., Housing 2051	P.P.U.
Centre Wellington	22,400	26,800	9,460	2.83
Erin	11,200	11,200	3,990	2.81
Wellington North	5,900	6,500	2,190	2.97
Minto	4,900	5,300	1,810	2.93
Mapleton	3,700	4,100	1,490	2.75
Guelph-Eramosa	400	1,800	860	2.09
Total	48,500	55,700	19,800	2.81

Source: Watson & Associates Economists Ltd.

2.5.2 Community Area Employment in the D.G.A.

Over the forecast period, it is assumed that one P.R.E. job is required for approximately every six residents in the D.G.A. Compared to the B.U.A., fewer P.R.E. jobs relative to the population base are anticipated on D.G.A. lands. Work at home employment is forecast to represent a larger component of P.R.E. in the D.G.A. compared to the B.U.A. The D.G.A. currently has a small commercial and institutional base (less than 200 jobs) on which to build. Based on a review of commercial site opportunities within the B.U.A., there are significant opportunities for new commercial development on vacant sites, as well as an opportunity for intensification. The majority of P.R.E. has been allocated to the B.U.A. at approximately 73%. The Town of Erin is anticipated to accommodate more employment in the D.G.A. relative to population size, primarily due to projected need for additional commercial and institutional employment growth in Hillsburgh. This is discussed further in Chapter 3. By 2051, it is forecast that approximately 9,100 jobs will be accommodated within the D.G.A.



Figure 2-31
County of Wellington
D.G.A. Employment to 2051

Area Municipality	D.G.A., Population 2051	P.R.E. Jobs	P.R.E. Ratio (Residents per 1 P.R.E. Job)
Centre Wellington	26,800	4,200	6.4
Erin	11,200	2,300	4.9
Wellington North	6,500	1,000	6.5
Minto	5,300	833	6.4
Mapleton	4,100	500	8.2
Guelph-Eramosa	1,800	300	6.0
Total	55,700	9,100	6.1

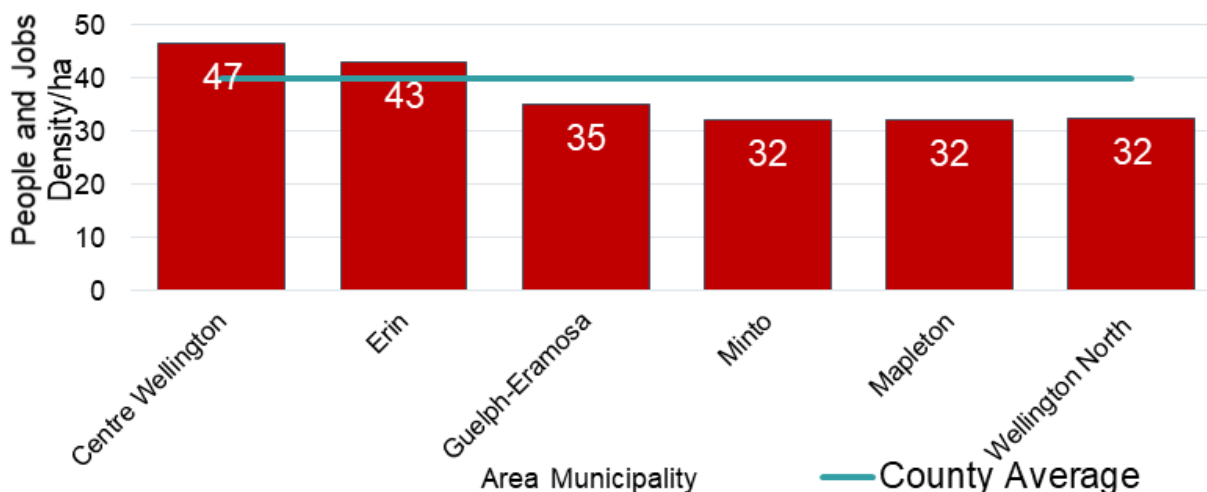
Source: Watson & Associates Economists Ltd.

2.5.3 D.G.A. Community Area Density Targets

As previously discussed, D.G.A. lands in Wellington County are anticipated to average 40 people and jobs/ha by 2051. The density is expected to range across the County from 32 people and jobs/ha to 47 people and jobs/ha. Density targets by Area Municipality have been established in consideration of existing density, average density of approved/draft approved developments, forecast housing mix and potential density on vacant D.G.A. lands. Figures 2-32 and 2-33 provide a summary of forecast D.G.A. density by Area Municipality and Urban Centre, respectively.

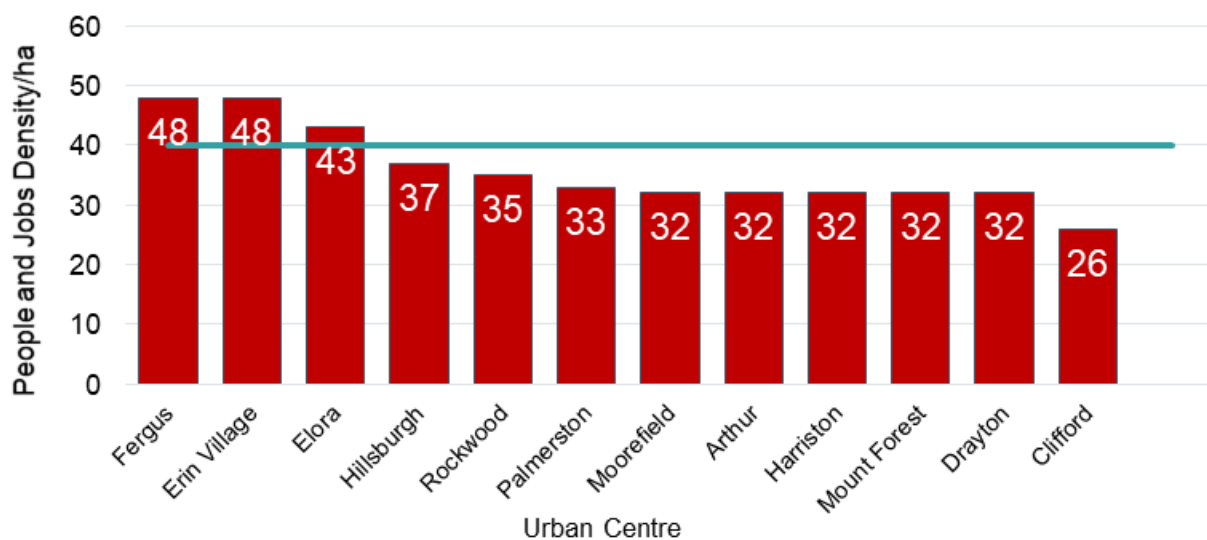


Figure 2-32
County of Wellington
D.G.A. People and Jobs Density by Area Municipality, 2051



Source: Watson & Associates Economists Ltd.

Figure 2-33
County of Wellington
D.G.A. People and Jobs Density by Urban Centre, 2051



Source: Watson & Associates Economists Ltd.



2.5.4 D.G.A. Land Needs to 2051

Figure 2-34 identifies the Community Area land needs by Area Municipality. Key highlights include the following:

- As summarized in Figure 2-34, the County is anticipated to accommodate a population and employment base in the D.G.A. of 64,800 people and jobs by 2051.
- As previously discussed, the County is anticipated to achieve a density of 40 people and jobs/ha by 2051.
- The D.G.A. has a supply of 1,107 gross ha of developable land, which is less than the land requirement of 1,602 gross ha to accommodate 64,800 people and jobs. As a result, the County is estimated to have a shortfall of Community Area land of approximately 495 gross ha.
- Except for Guelph-Eramosa, all Area Municipalities require additional designated lands to accommodate the Community Area population and jobs forecast to 2051.

Figure 2-34
County of Wellington
Urban Community Area Land Needs to 2051

Area Municipality	People and Jobs, 2051	People and Jobs Density/ha	Community Area Land Demand, ha	Designated Lands, ha	Additional Lands Required, ha
Centre Wellington	31,000	47	664	417	(247)
Erin	13,500	43	313	275	(38)
Wellington North	7,500	32	232	149	(83)
Mapleton	4,600	32	143	94	(49)
Minto	6,100	32	190	112	(78)
Guelph-Eramosa	2,100	35	60	60	(0)
Total	64,800	40	1,602	1,107	(495)

Source: Watson & Associates Economists Ltd.

Figure 2-35 identifies the Community Area land needs opportunities to accommodate the shortfall of Community Area lands. Key highlights include the following:



- As summarized in Figure 2-35, Future Development lands can accommodate up to 205 ha of Community Area land needs (subject to local demand) within the following Area Municipalities:
 - Town of Erin (38 ha)
 - Township of Mapleton (15 ha)
 - Town of Minto (61 ha)
 - Township of Wellington North (83 ha).
- The Township of Wellington North has approximately 87 ha of Future Development land that is not required for Community Area lands and/or Employment Area lands (Employment Area lands needs are discussed in Chapter 4).
- An additional 299 ha of Community Area land is required in the County to accommodate population and employment to 2051 through settlement area boundary expansions within the following Area Municipalities:
 - Centre Wellington (247 ha);
 - Mapleton (34 ha); and
 - Town of Minto (18 ha).

Figure 2-35
County of Wellington
Urban Community Area Land Needs to 2051

Area Municipality	Additional Lands Required, ha	Future Development Lands, ha	Settlement Area Boundary Expansion Lands Required, ha	Excess Lands, ha
Centre Wellington	(247)	0	247	0
Erin	(38)	38	0	0
Wellington North	(83)	170	0	87
Mapleton	(49)	15	34	0
Minto	(78)	61	18	0
Guelph-Eramosa	(0)	0	0	0
Total	(495)	284	299	87

Source: Watson & Associates Economists Ltd.



It is important to note that the South Fergus Secondary Plan (Township of Centre Wellington) is underway (not yet approved) and that the density for Fergus may be potentially upwardly adjusted during Phase 3 of the County of Wellington M.C.R. based on the completed South Fergus Secondary Plan. An adjustment to the density in Fergus may reduced the land need requirements for Centre Wellington, specifically Fergus Urban Centre.

Appendix D provides further details on the land needs requirements by Urban Centre and Area Municipality, while Appendix E provides additional details on housing units per ha and Community Area land needs assessment assumptions.

2.5.5 Community Area Lands – Settlement Area Boundary Expansion Lands (S.A.B.E.)

2.5.5.1 What is an S.A.B.E.?

A settlement boundary is a delineated area in the County's O.P. for each settlement area. To expand an existing settlement area, an adjustment to the settlement boundary is required. Any adjustments to the settlement boundary need to be updated in the County's O.P. as part of an M.C.R. In accordance with the Growth Plan, 2019, a small S.A.B.E. of 40 ha or less can occur outside an M.C.R., as previously discussed in Chapter 1. Ultimately, an S.A.B.E. requires the completion of an assessment, including supporting studies, which will be reviewed by the Province as part of the M.C.R. This will be carried out in Phase 3 of the County of Wellington M.C.R.

The Growth Plan, 2019 provides direction for where and when S.A.B.E.s are permitted. This includes policies directing expansions to areas with sufficient planned or existing infrastructure capacity and public service facilities to bring lands into the Urban System. S.A.B.E.s should avoid Prime Agricultural Areas and the Natural Heritage System for the Growth Plan where possible in both the Urban and Rural Systems.

The approach in assessing an S.A.B.E. for the Urban System and Rural System differs. Generally, the Growth Plan, 2019 permits only minor S.A.B.E. requests within the Rural System, which includes rounding out existing residential developments and expansions for Rural Employment Area for existing businesses. Within the Urban System, the Growth Plan, 2019 requires an S.A.B.E. be based on a detailed assessment once it has



been established that there is a need for such an expansion.^[1] According to the P.P.S., 2020, the level of detail of the S.A.B.E. assessment should correspond with the complexity and scale of the S.A.B.E. or development proposal.^[2] Further details on the policy requirements for Urban and Rural S.A.B.E.s are provided below.

2.5.5.2 Urban S.A.B.E.

According to the Growth Plan, 2019, an S.A.B.E. for additional lands within the Urban System needs to be justified through an L.N.A. Once a need has been established, the S.A.B.E. is then reviewed based on the feasibility of the proposed expansion, and the most appropriate location for the proposed expansion will be identified based on the comprehensive application of the policies of the Growth Plan, 2019, including the following requirements:

- Sufficient opportunities to accommodate growth are provided (i.e., land configuration supports an optimal net developable area and ratio);
- Adjacent land uses are compatible;
- Infrastructure in the area is available, planned or can be provided;
- Expansion near key hydrologic areas and environmental features is avoided where possible;
- An agriculture assessment if on prime agriculture lands is conducted; and
- There is compliance with minimum distance separation (M.D.S.) formulae if in proximity to agriculture operations.^[3]

2.5.5.3 Rural S.A.B.E.

Rural S.A.B.E. requirements for residential lands are limited to minor rounding of hamlet boundaries. An adjustment to the boundary of hamlets for residential development requires a site-specific review based on planning rationale. Similar to the urban S.A.B.E., a rural S.A.B.E. also requires an agricultural assessment if on prime agriculture lands and compliance with M.D.S. formulae if in proximity to agriculture operations.

^[1] A Place to Grow: Growth plan for the Greater Golden Horseshoe, 2019, Policy 2.2.8 and Policy 2.2.9, pp. 25 to 27.

^[2] Provincial Policy Statement, 2020, Policy 1.1.3.8, p. 10.

^[3] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, Policy 2.2.9.3, p. 25.



2.5.5.4 S.A.B.E. Requirements for Wellington County to 2051

As previously discussed, the County of Wellington requires an additional 299 ha within the County's urban settlement areas (Employment Area land needs are discussed in Chapter 4) to accommodate Community Area uses (residential and population-related employment uses). The Township of Centre Wellington has the largest need for additional Community Area lands of approximately 247 ha, while the Township of Mapleton and the Town of Minto require 34 ha and 18 ha, respectively. It is important to note that the potential to redesignate Future Development lands has already been factored in the land needs analysis. Phase 3 of the County of Wellington M.C.R. will explore location options to expand the urban boundary for the urban centres of Fergus, Elora, Drayton, Moorefield and Palmerston.

2.5.6 Community Area Lands – Excess Lands

2.5.6.1 What are Excess Lands?

According to the Growth Plan, 2019, excess lands are “vacant, unbuilt but developable lands within settlement areas but outside of delineated built-up areas that have been designated in an official plan for development but are in excess of what is needed to accommodate forecasted growth to the horizon of this Plan.”^[1]

It is important to recognize that Excess Lands do not involve a redesignation or change in settlement boundary. The land supply will be reviewed again at least a few times over the next 30 years. While Excess Lands do not have to be redesignated, municipalities are required to identify these lands in the O.P. (i.e., as an overlay).

2.5.6.2 Excess Lands in Wellington County

As previously discussed, the Township of Wellington North has approximately 87 ha of Future Development land that is not required for Community Area lands and Employment Area lands (Employment Area land needs are discussed in Chapter 4).

Phase 3 of the M.C.R. will identify locations and explore planning policies to address excess lands in Wellington North through consultation with the Township. Based on preliminary findings and discussions with the Township of Wellington North staff, it is anticipated that approximately 61 ha of Future Development lands in Arthur and 29 ha

^[1] Growth Plan, 2019, p. 70.



of Future Development lands will be identified as excess (totalling 87 ha). As discussed later in Chapter 4, approximately 42 ha of Employment Area lands in Mount Forest will also need to be identified as Excess Lands.

2.6 Community Area Recommendations

This chapter provides a detailed assessment of the County's recommended housing intensification target, D.G.A. density target and D.G.A. Community Area land needs to the year 2051. Based on this assessment the following recommendations are provided.

It is recommended that the County request an alternative residential intensification target of 15% (instead of the Growth Plan, 2019 requirement of 20%) based on a review of future opportunities and existing constraints within the B.U.A. Key constraints for achieving a higher intensification include floodplain hazards, heritage considerations and the limited size of the B.U.A. within Urban Centres to support intensification. The Township of Centre Wellington and the Township of Wellington North have been identified as the only Area Municipalities within the County with the opportunity to achieve a housing intensification rate of 20%. The remaining Area Municipalities are recommended to target an intensification rate of up to 15%, as summarized in Appendix A.

The recommended D.G.A. density target for Wellington County is 40 people and jobs/ha. It is recommended that a higher D.G.A. density is targeted for the Township of Centre Wellington (47 people and jobs/ha) and the Town of Erin (43 people and jobs/ha). These two Area Municipalities are anticipated to accommodate a large portion of the County's D.G.A. population growth to 2051. The remaining Area Municipalities are anticipated to achieve a lower average D.G.A. density by 2051 ranging between 32 and 35 people and jobs/ha.

It is anticipated that the County's Urban Centres will play an increasing role in broadening future housing options available within the County with respect to housing by structure type, as discussed in the County of Wellington Phase 1 M.C.R. Report. Based on the comprehensive analysis carried out herein, it has been determined that the County has an overall shortfall of designated Community Area land of approximately 501 gross ha to 2051. The County will need to redesignate approximately 290 ha of Future Development to Community Area uses and expand Urban Settlement Area boundaries to accommodate 299 ha of identified Community Area lands. Recognizing



differences in local urban land supply and demand across the County, it is recommended that approximately 87 ha of Future Development lands in Wellington North are identified as Excess Lands.

As discussed further in Chapter 5, it is recommended based on a review of potential Employment Area conversion sites that three sites be converted to non-employment use in Centre Wellington. **As a result, the Community Area lands are reduced from 247 ha to 238 ha. Within Centre Wellington the Community Area land needs are reduced from 247 ha to 238 ha.**

Phase 3 of the County of Wellington M.C.R. will explore the following for Community Areas:

- Future Development lands of 195 ha to be redesignated to Community Area land (e.g., residential, mixed-used, commercial, etc.);
- Location options for 290 ha of S.A.B.E. based on the results of this Phase 2 study;
- Location options for 87 ha of identified Excess Lands in Wellington North (lands that are currently designated as Future Development) and the development of a policy approach to manage these lands in the County O.P. (i.e., excess lands policy overlay); and
- Additional policy considerations.

It is important to note that the Fergus South Secondary Plan (Township of Centre Wellington) is underway (not yet approved) and that the density for Fergus may be potentially upwardly adjusted during Phase 3 of the County of Wellington M.C.R. based on the completed Fergus South Secondary Plan. An adjustment to the density in Fergus may reduced the land need requirements for Centre Wellington, specifically Fergus Urban Centre.



Chapter 3

Community Area Employment Analysis



3. Community Area Employment Analysis

P.R.E. uses in Community Areas represent an important component in building complete communities by providing residents access to retail goods and services as well as a range of employment opportunities. This chapter provides a discussion regarding opportunities for urban non-residential development within the County of Wellington's Community Areas. A summary of the requirements for commercial lands is provided.

3.1 Introduction

3.1.1 Planning for Community Employment in Community Areas

In accordance with the provincial L.N.A. methodology guidelines, Community Areas are defined as urban lands where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment lands employment (E.L.E.) jobs.^[1] In accordance with the L.N.A. methodology guidelines, Community Areas represent Urban Settlement Areas that are fully serviced (water and wastewater servicing). Within the County of Wellington, these settlement areas are referred to as Primary Urban Centres.

The L.N.A. methodology does not provide specific requirements for the planning of P.R.E. uses in Community Areas. The general policy thrust of the Growth Plan, 2019, however, is to plan for “complete communities” with a focus on supporting mixed uses, which integrate residential and non-residential uses where appropriate. A key distinction with planning for employment in Community Areas as opposed to Employment Areas is that employment is highly integrated within Community Areas, while Employment Areas provide the opportunity to buffer employment uses that have a lower degree of compatibility with the rest of the settlement area.

Recent trends in the retail sector support policy direction for complete communities, as market demand for large tracts of single-purpose, non-residential uses such as retail big-box uses is softening. E-commerce is impacting the form of commercial uses with a greater focus on smaller commercial units (less than 2,000 sq.m/22,000 sq.ft.) that

^[1] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). August 2020.



serve the daily needs of nearby residents (e.g., food stores, restaurants, personal services and drug stores), as well as commercial uses that provide experiences. It is important to recognize, however, that “bricks and mortar” retail is still the most effective means of consumer distribution. The continued growth in e-commerce is requiring retailers to remodel their supply chains and retail networks through micro-distribution centres. Micro-distribution centres involve utilizing small, highly automated storage facilities located close to the end consumer to reduce the cost and time it takes to deliver goods. A key focus is on leveraging existing retail stores to accommodate the “last mile” of e-commerce logistics. From a planning perspective this has the potential to undermine planning objectives of place-making and active transportation, as these retail uses increase the warehousing/storage function of a site and add drive-thru or curb-side lanes. On the other hand, retail sites supporting e-commerce redirect delivery vehicles away from residential and mixed-use neighbourhoods.

3.1.2 What is Population-Related Employment?

P.R.E. is accommodated throughout Wellington County’s Community Areas and to a lesser extent in the County’s Employment Areas. P.R.E. represents the majority of employment accommodated in the Community Areas. P.R.E. typically includes the following employment sectors:

- Personal services, retail and tourism;
- Health care, public administration and educational services; and
- Office sectors.



Figure 3-1
County of Wellington
Examples of P.R.E. Uses Across the County

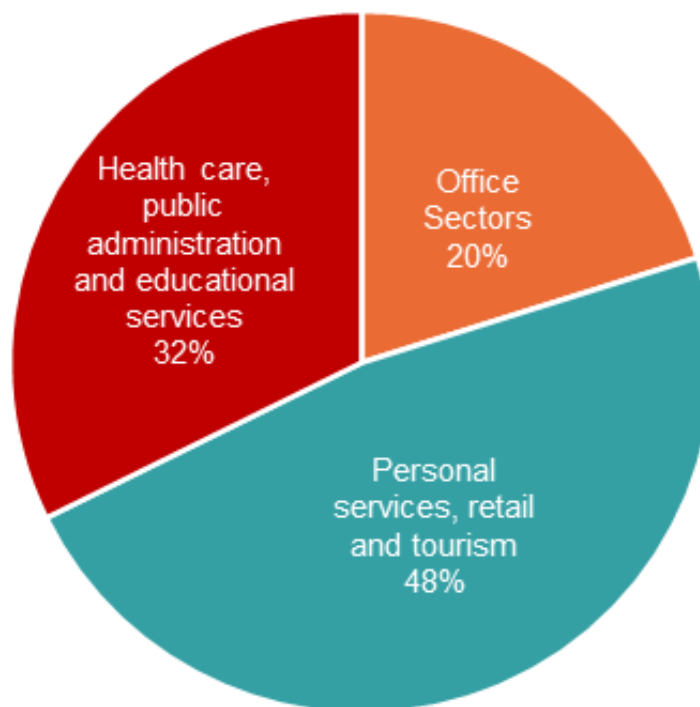


Notes: Images include a library/medical centre in Arthur; professional offices in Hillsburgh; retail uses in Fergus; a school in Rockwood; the downtown area in Erin Village; and a theatre in Drayton.

Figure 3-2 provides a summary of P.R.E. by sector in Wellington County as of 2016. As summarized, approximately 48% of P.R.E. consists of personal services, retail and tourism which is typically accommodated in retail buildings, followed by 32% in health care, public administration and educational services and 20% in the office sectors.



Figure 3-2
County of Wellington
Population-Related Employment Sectors by Type, 2016



Notes: Employment has been grouped into categories that include health care, public administration and educational services: NAICS 91, 61 and 62; personal services, retail and tourism: NAICS 71, 81, 72 and 44-45; and Office Sectors: NAICS, 51, 52, 53 and 55. Source: Based on Statistics Canada 2016 Census, Place of Work data by Watson & Associates Economists Ltd. No Fixed Place of Work employment is included.

P.R.E. opportunities are driven by population growth; however, P.R.E. opportunities are also influenced by the location and role of the municipality within a regional context, which varies across the G.G.H. The P.R.E. base in Wellington County varies by Urban Centre. Generally, all Urban Centres primarily serve the local population, while residents in some of the Urban Centres are dependent on other Urban Centres in the County or in other municipalities for higher-order P.R.E. uses (e.g., hospitals, regional shopping centres and post-secondary institutions). Several of the County's Urban Centres also support tourism. The County of Wellington has approximately one P.R.E. job per five residents, while the County's Urban Centre has approximately one job per three residents. Overall, the County has a large P.R.E. base relative to its population base. The County's Urban Centres function as service and commercial centres for



nearly half the County's population (approximately 47%) which is rural and outside an Urban Centre. Urban Centres also support communities outside the County (e.g., Mount Forest serving population in Grey County), while some Urban Centres are influenced by competitive service and commercial options in nearby larger Urban Centres outside the County (e.g., due to location, Rockwood is influenced by options in the City of Guelph).



Images: C.B.D.s in Elora and Fergus. Tourism is an important component of the local economy in Elora and Fergus.

In general, P.R.E. is typically located in the areas discussed below.

- Downtown cores, which include the traditional main street of the County's Urban Centres, accommodate a range of commercial services and office uses, as well as support the tourism industry with unique shops and restaurants.
- Highway Commercial sites, where the majority of the County's larger retail uses are accommodated, typically accommodate grocery stores, hardware and home improvement stores, gas stations, building materials stores, automotive dealerships and fast-food restaurants.
- Institutional sites, which are not always clustered, include schools, daycares, medical facilities, places of worship, public facilities and administration and are accommodated in residential or commercial areas.
- The County's Employment Areas accommodate a small share of P.R.E. and represent 18% of the employment in Employment Areas. P.R.E. uses in Employment Areas generally include automotive service and repair, office uses and restaurants. The Grand River Racetrack/Casino in Elora is within an



Employment Area; excluding this site, the portion of P.R.E. in Employment Areas is 8%.

- Work at home employment comprises a large share of P.R.E., approximately one out of every 14 residents in the County works from home as of 2016. While this P.R.E. use does not involve additional land, it does contribute towards the people and jobs density (upward impact).

3.1.3 County of Wellington O.P. Policies

The County has the following designations for P.R.E. uses in the Community Areas, as identified in the County's O.P.:

- Central Business District (C.B.D.); and
- Highway Commercial.

In addition, the Township of Centre Wellington has identified in its local O.P. a mixed-use designation for Secondary Plans and special policy areas indicating that “an integration of commercial and residential land uses is a critical component of achieving better places to live.”^[1]

The County's Residential Transition designation, which is primarily residential, surrounds the C.B.D. designation and is permitted to accommodate a select range of P.R.E. uses, including professional offices, clinics, personal services, day care centres, nursery schools, as well as churches and service clubs. It is noted in the O.P. that these uses do not generate the same level of vehicular and pedestrian traffic as retail facilities for shopping, dining and overnight accommodation.^[2]

The County's Residential designation permits non-residential uses such as schools, churches, clinics, local convenience stores, neighbourhood parks and other public facilities and may be subject to the appropriate zoning by-law regulations and the policies of the O.P.^[3]

^[1] Township of Centre Wellington O.P., p. 51.

^[2] County of Wellington O.P., policy 5.5.1., p. 105.

^[3] Ibid., policy 8.3.3., p. 100.



Central Business District Designation

The C.B.D. of the Urban Centre is identified in the O.P. as a strong focus for business, administrative, and cultural activities and remains the primary gathering place combining both commerce and social functions. Policies in the County O.P. support creating the C.B.D. as a compact and pedestrian-focused area of the Urban Centre. To protect the character of the C.B.D., lower intensity P.R.E. uses that require large on-site parking facilities, on-site storage, and are oriented to vehicular traffic are directed to Highway Commercial sites.^[1] Residential development is permitted within this designation provided that retail, office or service commercial uses are located at street level.^[2]

Highway Commercial Designation

The predominant use of land within areas designated Highway Commercial includes commercial uses that serve the travelling public or uses not considered compatible within the C.B.D. of the Urban Centre.^[3] Similar to the C.B.D. designation, residential development is permitted within this designation provided that retail, office or service commercial uses are located at street level.^[4]

The County O.P. includes policies to protect Highway Commercial lands, which are provided under the same conversion policy framework as lands designated Industrial (Employment Area).^[5] As discussed in the County of Wellington Phase 1 M.C.R. Report, it is recommended that the County exclude Highway Commercial lands in Employment Area protection policies since Highway Commercial permits major retail and residential uses.

Best practices in planning for commercial uses across Ontario have generally moved away from stand-alone commercial designations and towards a mixed-use commercial designation. While municipalities are encouraging mixed uses on commercial sites,

^[1] County of Wellington O.P., policy 8.4, p. 103.

^[2] Ibid., policy 8.4.3, p. 104.

^[3] Ibid., policy 8.6.1, p. 106.

^[4] Ibid., policy 8.6.3, p. 107.

^[5] Ibid., policy 4.2.2, p. 35.



there is a need to ensure that the sites accommodate a good balance of non-residential and residential uses. The following are considerations for commercial O.P. policies:

- The County should consider modifying the Highway Commercial designation to a Mixed-Use Corridor designation to allow for flexibility in the marketplace to respond to future trends and to integrate non-commercial uses onto mixed-use sites, as well as to allow the ability to address individual site-specific circumstances.^[1] This allows for stand-alone commercial uses that already exist in many of the Urban Centres, as well as mixed-use opportunities. There is a need to consider setting minimum thresholds for commercial uses to ensure that mixed-use sites support complete community principles, as well as ensuring that existing commercial sites are transitioned with a balanced mix of uses while supporting complete community principles.
 - Minimum commercial thresholds may include the requirement that commercial sites should retain at least 25% of the existing commercial floor space within the mixed-use development. Mixed-use developments on vacant sites should require a floor space index minimum of 0.15 for commercial uses.^[2]
- Wellington County should consider policies to ensure there is an adequate supply of commercial lands by requiring that proposals for mixed-use development include a Commercial Functional Study prepared by the applicant. This study would provide an assessment of the commercial need, the development impact on the commercial structure and how the mixed-use development would be best integrated in the existing community.^[3]

^[1] The City of Guelph Official Plan Amendment No. 69 has similar commercial policies which were informed by the City's Commercial Policy Review.

^[2] The City of Guelph Official Plan Amendment No. 69 has similar commercial policies which were informed by the City's Commercial Policy Review.

^[3] The City of Guelph O.P.A. No. 69 has a similar policy. Other municipalities, including the City of Hamilton, have set minimum commercial floor space minimums on designated mixed-use sites and require market studies for developments that propose a low threshold for commercial floor space.



3.2 Employment Forecast Allocation to Community Area

3.2.1 Community Area Employment Forecast by Policy Area

Figure 3-3 summarizes the Community Area employment forecast by D.G.A. and B.U.A. by 2051 for each Area Municipality. It is anticipated that the B.U.A. will represent 73% of Community Area employment by 2051 and the D.G.A. will accommodate just over a quarter (27%) of Community Area employment. The D.G.A. is anticipated to accommodate one job per six residents in the D.G.A. by 2051, while the B.U.A. is expected to continue to accommodate the largest concentration of Community Area employment with one job per two residents by 2051. It is anticipated that existing P.R.E. sites in the B.U.A. (e.g., retail, school and other institutional sites) will support expansions and infill development. The Town of Erin is the only Area Municipality where it is anticipated that Community Area employment will be larger in the D.G.A. than in the B.U.A., largely due to the amount of D.G.A. growth and the limited supply of commercial and institutional sites outside the C.B.D. to support intensification.

Figure 3-3
County of Wellington
Urban Centres
Community Area Employment Forecast by Policy Area, 2051

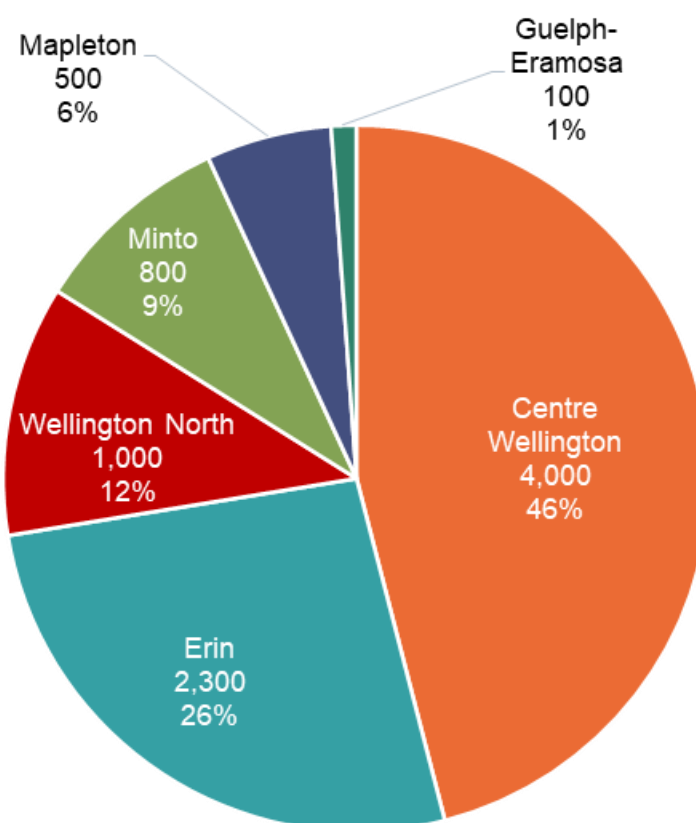
Area Municipality (Urban Centres)	D.G.A. Jobs	B.U.A. Jobs	Urban Centre Community Area Jobs	Residents per 1 Job in D.G.A.	Residents per 1 Job in B.U.A.
Centre Wellington	4,200	13,100	17,300	6.4	1.8
Erin	2,300	1,100	3,400	4.9	5.1
Wellington North	1,000	4,300	5,300	6.5	2.0
Minto	800	2,400	3,200	6.4	2.7
Mapleton	500	2,400	2,900	8.2	1.1
Guelph-Eramosa	300	1,500	1,800	6.0	2.7
Total	9,100	24,800	33,900	6.1	2.1

Source: Watson & Associates Economists Ltd.



Over the 2020 to 2051 period, it is anticipated that the D.G.A. will accommodate 8,300 Community Area jobs. The existing Community Area employment in the D.G.A., as of 2019, represents a small component of the D.G.A. base. Approximately 40% of the employment in the D.G.A. is anticipated to be comprised of work at home employment. The remaining 60% of the Community Area in the D.G.A. will comprise commercial and, to lesser extent, institutional uses. Figure 3-4 provides a summary of the Community Area growth increment over the 2020 to 2051 period by Area Municipality. Community Area employment is largely influenced by population growth, in particular the work at home component. Following this section, a review of commercial opportunities is provided by Area Municipality which explores the commercial dynamics of the County's Urban Centres.

Figure 3-4
County of Wellington
Urban Centres
D.G.A. Community Area Employment Forecast by Area Municipality, 2020 to 2051



Source: Watson & Associates Economists Ltd.

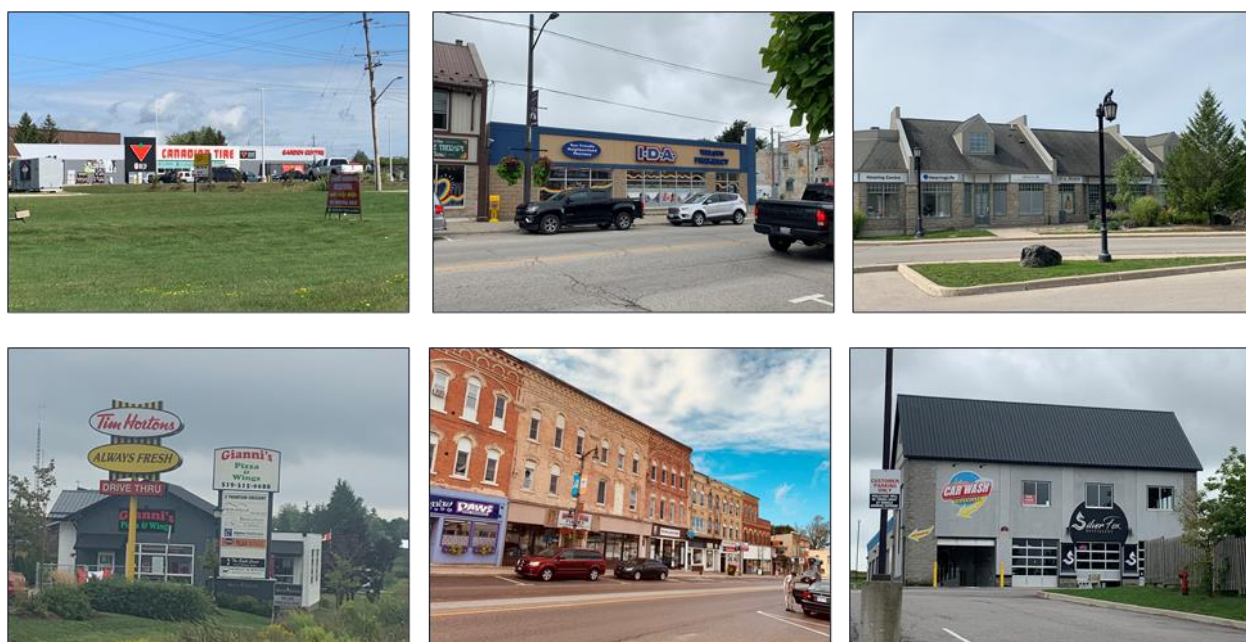


3.3 Commercial Overview

3.3.1 Existing Commercial Service and Retail Base, 2020

The County has approximately 3.1 million sq.ft. (289,000 sq.m) of commercial service and retail building floor space in the Urban Centres as of 2020. The inventory includes all purpose-built retail space as well as office space. Figure 3-5 provides examples of commercial uses included in the inventory.

Figure 3-5
County of Wellington
Examples of Commercial Service and Retail Uses Included in Inventory



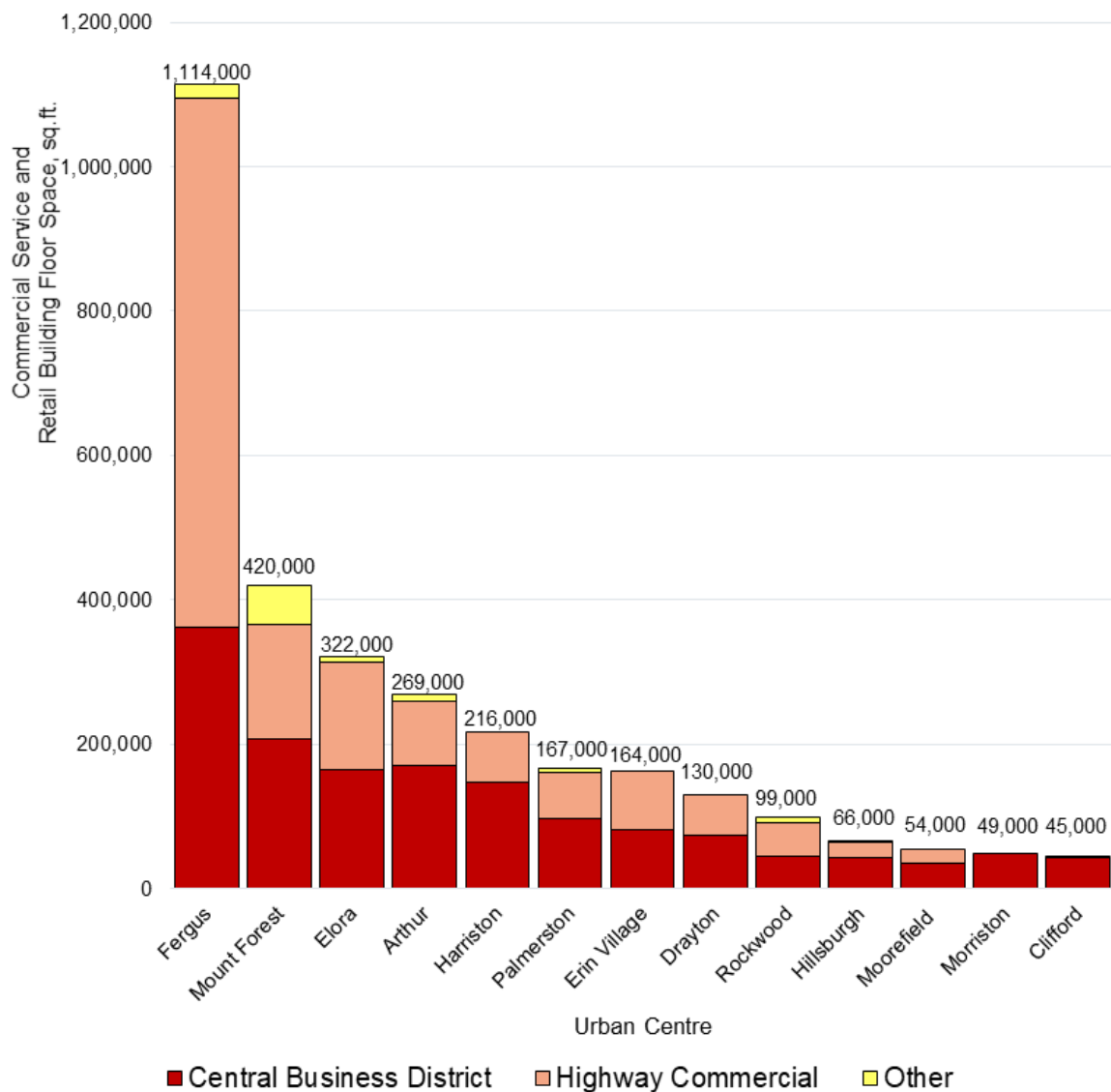
Images of the range of commercial uses: major retailer (Mount Forest), downtown retail anchor (Arthur), offices (Fergus), fast-food outlet (Erin); downtown retailers (Mount Forest) and a car wash and distillery outlet (Arthur).

Figure 3-6 provides a summary of the commercial service and retail space by Urban Centre. All Primary Urban Centres, as well as Morriston, a Secondary Urban Centre (within the Rural System), are included in Figure 3-5 for comparison. Aberfoyle, also a Secondary Urban Centre, is not included in the figure. The Aberfoyle commercial base includes an antique mall, automotive repair shop, ancillary pet store, two restaurants and two décor stores (totalling less than 40,000 sq.ft./4,200 sq.m). Highway-oriented uses in Aberfoyle are on Rural Employment Area lands near Highway 401. The C.B.D.s



in the Urban Centres accommodate just under half (49%) of the commercial service and retail building floor space as of 2020. Approximately 48% is accommodated in the Highway Commercial designation, while the remaining small portion is accommodated within other designations.

Figure 3-6
County of Wellington
Urban Centres Commercial Services and Retail Building Floor Space (sq.ft.) as of 2020



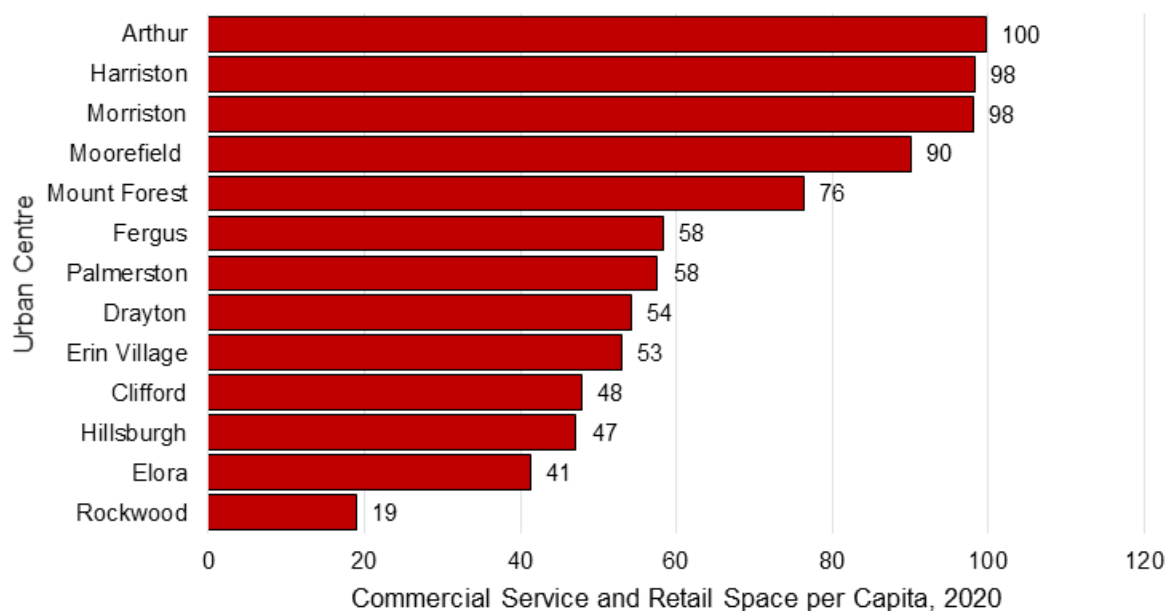
Source: Watson & Associates Economists Ltd. based on site visits in mid-2020 and desktop review.



3.3.2 Commercial and Service Space Per Capita

The County's Urban Centres have approximately 57 sq.ft. (5 sq.m) of commercial service and retail building floor space per resident. The County has more commercial service and retail space relative to population compared to other markets in the G.G.H. As previously discussed, this is largely due to the function of the Urban Centres in serving visitors to the area, the large rural population in the County, as well as neighbouring communities outside the County. As summarized in Figure 3-7, Arthur, Harriston, Morriston and Moorefield each have a large commercial base relative to the population of the Urban Centre. The high commercial service and retail space per capita in Arthur is a concern, since the Arthur Urban Centre has a commercial service and retail space vacancy above a healthy range (estimated at 14%; a healthy vacancy rate is between 5% to 8%). The Rockwood Urban Centre has a small commercial and service base relative to its population base, largely due to its proximity to the City of Guelph and the limited supply of commercial lands available.

Figure 3-7
County of Wellington
Urban Centres
Commercial Service and Retail Space Per Capita, 2020



Source: Watson & Associates Economists Ltd.



3.3.3 Central Business Districts

Wellington County's C.B.D.s accommodate 1.5 million sq.ft. (140,500 sq.m) of commercial service and retail space and approximately 3,800 jobs as of 2020. The C.B.D.s are considered the centre of the Urban Centres and contribute towards place-making and the identity of the County's urban areas.



Images of C.B.D.s in Arthur, Fergus, and Erin Village.

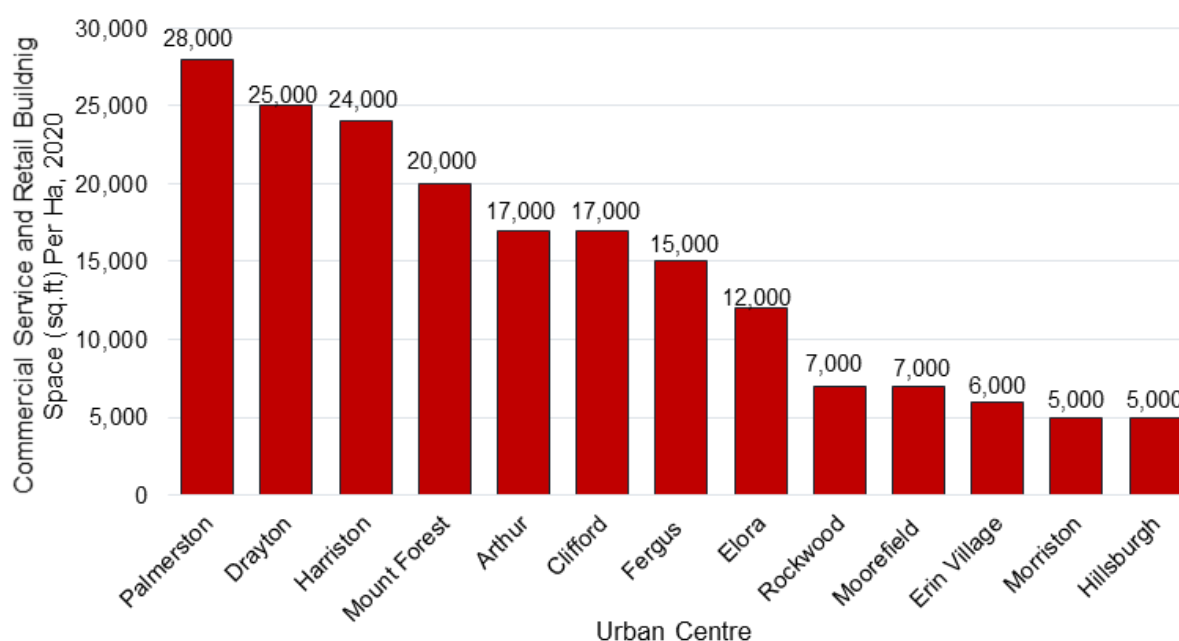
The Fergus C.B.D. represents nearly a quarter of the County's C.B.D. employment base. Figure 3-9 provides a summary of the commercial service and retail building floor space relative to the land area (per ha) of the C.B.D.s by Urban Centre. This provides a high-level analysis of the intensity of each C.B.D. related to non-residential space and identifies potential opportunities for intensification. Overall, the C.B.D.s in the County accommodate 13,000 sq.ft. (1,200 sq.m) per ha. As summarized in Figure 3-7, the C.B.D.s in Palmerston, Drayton and Arthur have the highest intensity of commercial service and retail space in the County. This is largely due to the fact that these C.B.D.s comprise predominantly commercial uses, while other C.B.D.s accommodate a residential component. On the opposite spectrum, Rockwood, Erin Village, Moorefield, Morriston and Hillsburgh each have a very low intensity of commercial service and retail space in their respective C.B.D.s. These C.B.D.s have underutilized commercial properties and building uses with low building floor space ratios.

Erin Village has a large retail plaza (anchored by Valumart), a gas station and some empty lots in the C.B.D. which contribute towards a low intensity of commercial space in the C.B.D. The C.B.D. in Erin Village is slightly larger in terms of land area than the C.B.D. in Elora; however, it accommodates less than half the commercial service and retail space than Elora. Similarly, C.B.D. lands in Hillsburgh primarily comprise residential lots, a small strip of retail buildings and a large food store.



The majority of C.B.D. lands in Moorefield are underutilized, in particular the lands to the west that currently include an industrial building. The Morriston C.B.D. includes large, underutilized lots to the northern extent of the C.B.D., including a commuter parking lot. It is recognized that since Morriston is within the Rural System with no servicing, intensification opportunities are more limited.

Figure 3-9
County of Wellington
Central Business Districts
Commercial Service and Retail Floor Space Per ha



Source: Watson & Associates Economists Ltd.

3.3.4 Highway Commercial Vacant Land Supply

The County has approximately 177 gross ha (289 acres)^[1] of vacant commercial lands as of mid-2019 within Urban Centres (includes the lands in South Fergus Secondary Plan that are identified as commercial in local plans, but not designated in the O.P.). Based on an analysis prepared by the County of Wellington, it is estimated that the net

^[1] In accordance with the Growth Plan, the land area is net of environmental features. The land area does not include an adjustment for the developable land area, net of roads and other internal infrastructure.



developable land area is 78 net ha (195 net acres), and excludes properties likely not to be developed over the planning horizon because they are land-locked, constrained due to servicing, or there are other factors which limit their developability.^[1] As summarized in Figure 3-10, vacant commercial lands within Urban Centres have the capacity to accommodate up to 4,300 employees and 2.1 million sq.ft. (196,700 sq.m) of commercial service and retail space.

Figure 3-10
County of Wellington
Highway Commercial Land Supply by Urban Centre
Employment and Commercial Service and Retail Space Capacity as of Mid-2019

Urban Centre	Total Gross, ha (Net of Environmental Features)	Total Net Developable Land Area, ha	Estimated Employment Capacity	Estimated Commercial Floor Space Capacity (sq.ft.)
Fergus	70	27.0	1,480	725,000
Erin Village	32	17.0	910	446,000
Elora	25	13.0	690	338,000
Mount Forest	16	9.0	490	240,000
Clifford	13	5.0	300	147,000
Moorefield	8	4.0	240	118,000
Palmerston	8	3.0	160	78,000
Harriston	1	0.4	20	10,000
Drayton	2	0.2	10	5,000
Rockwood	1	0.2	10	5,000
Arthur	2	0.3	10	5,000
Hillsburgh	0	0.0	0	0
Total	178	79.0	4,320	2,117,000

Note: Estimated Commercial and Retail Employment capacity based on 55 jobs/ha. Estimated Commercial Service and Retail Building Floor Space Capacity (sq.ft.) based on 490 sq.ft. per employee and assumes 25% building coverage.

Source: Land supply based on data from the County of Wellington as of mid-2019. Demand forecast by Watson & Associates Economists Ltd.

^[1] The net developable available land area is estimated at 97 ha, reported by the County of Wellington, Committee Report, March 12, 2020, Land Inventories, PD-2020-01.



3.3.5 Urban Commercial Employment Land Demand and Land Requirements to 2051

Over the forecast horizon, it is anticipated that commercial service and retail space per capita will decline largely due to the on-going impacts of e-commerce. It is forecast that for every net additional person added to an Urban Centre, the County will require an average of 39 sq.ft. of commercial service and retail space. As previously discussed, the County's Urban Centres currently accommodate approximately 57 sq.ft. of commercial service and retail space per resident. By 2051, this is anticipated to decline to 49 sq.ft. per resident, as commercial growth is anticipated to increase at a slower rate than population growth. As summarized in Figure 3-11, a range in commercial service and retail space per capita was utilized based on local dynamics (e.g., existing occupied space and estimated trade area).

Over the 2020 to 2051 period, the County will require at least 2.2 million sq.ft. (200,000 sq.m) of commercial service and retail floor space to serve the population growth anticipated. It is estimated that approximately 20% of the commercial demand would be accommodated through intensification on existing commercial sites in the B.U.A. and D.G.A. A higher intensification rate is assumed for the Arthur Urban Centre since there is approximately 30,000 sq.ft. (2,800 sq.m) of vacant commercial service and retail space that could be potentially occupied.

Appendix F provides further details on the commercial supply.



Figure 3-11
County of Wellington
Commercial Employment and Gross Leasable Area (G.L.A.) Floor Space (sq.ft.)
Demand by Urban Centre, 2020 to 2051

Urban Centre	Population Growth, 2020 to 2051	Target Commercial Service and Retail Space per Capita	Adjusted for Intensification, Commercial Service and Retail Space, G.L.A.	Commercial Service and Retail Employment on New Lands
Fergus	18,100	40	579,000	1,200
Erin Village	7,600	45	274,000	600
Elora	6,400	40	205,000	400
Hillsburgh	5,800	40	186,000	400
Mount Forest	5,100	40	163,000	300
Palmerston	4,000	40	128,000	300
Drayton	2,000	40	64,000	100
Moorefield	1,900	30	46,000	100
Arthur	2,100	20	29,000	100
Harriston	1,300	20	21,000	<100
Clifford	500	30	12,000	<100
Rockwood	700	20	5,000	<100
Total	55,500	39	1,712,000	3,500

Note: It is assumed that 20% of commercial demand will be accommodated through intensification.

Source: Watson & Associates Economists Ltd.

Based on a review of commercial service and retail demand and designated commercial lands supply, it is forecast that the County has a 9-ha surplus of commercial lands at the County-wide level; however, there are local shortfalls, as summarized in Figure 3-12.

The Hillsburgh Urban Centre currently does not have any designated Highway Commercial lands. Over the forecast period, it is anticipated that Hillsburgh will require at least 7 ha of commercial land which may be accommodated through the redesignation of Future Development lands. Palmerston, Drayton and Arthur also have



small additional commercial land requirements which may be accommodated through the redesignation of Future Development lands.

While Fergus has a small surplus of commercial land (5 ha), any changes to the South Fergus Secondary Plan with respect to commercial land may have an impact on commercial needs. Without the South Fergus Secondary Plan lands, Fergus has a shortfall of commercial lands. While an S.A.B.E. may provide opportunities for the inclusion of commercial service and retail uses, effort should be made to expand existing corridors instead of establishing new nodes and corridors.

Figure 3-12
County of Wellington
Commercial Land Demand and Land Requirements
by Urban Centre, 2020 to 2051

Urban Centre	Commercial Land Demand, ha	Commercial Land Supply	Additional Commercial Land Required (Shortfall)/Surplus
Hillsburgh	7	0.0	(7.3)
Palmerston	5	2.8	(2.6)
Drayton	2	0.2	(1.6)
Arthur	2	0.3	(1.6)
Harriston	Less than 1 ha	0.4	0.0
Clifford	Less than 1 ha	5.5	0.0
Rockwood	Less than 1 ha	0.2	0.0
Moorefield	2	4.4	2.5
Mount Forest	5	8.8	3.4
Fergus	22	26.9	5.0
Elora	7	12.6	5.4
Erin Village	11	16.6	5.7
Total	64	79.0	9.0

Source: Watson & Associates Economists Ltd.



3.4 Community Area Commercial Land Need Recommendations

The County's Urban Centres function as important service and retail centres, serving the large rural population base of the County, as well as communities beyond the County. It is estimated Wellington County has approximately 57 sq.ft. of commercial service and retail space per resident. Compared to other markets in the G.G.H., the County has more commercial service and retail space relative to population. Over the 2020 to 2051 period, it is estimated that the County's commercial service and retail space per capita will decline largely due to e-commerce. Furthermore, it is anticipated that approximately 20% of commercial demand will be accommodated through intensification.

Within the County, it is forecast that Hillsburgh has the largest need for additional commercial land (7 ha), while Drayton, Palmerston and Arthur require 2 to 3 ha. Additional commercial land requirements could be accommodated through the redesignation of Future Development lands. New designated commercial lands should be added in strategic areas that strengthen and complement the existing commercial structure. Phase 3 of the Wellington County M.C.R. study will explore the location of additional commercial lands.

As discussed, while Fergus has a small surplus of commercial land (5 ha), any changes to the South Fergus Secondary Plan with respect to commercial land may have an impact on commercial needs. Without the South Fergus Secondary Plan lands, Fergus has a shortfall of commercial lands. While an S.A.B.E. may provide opportunities for the inclusion of commercial service and retail uses, effort should be made to expand existing corridors instead of establishing new nodes and corridors.



Chapter 4

Employment Area Analysis and Land Needs Assessment



4. Employment Area Analysis and Land Needs Assessment

This chapter provides a detailed discussion regarding opportunities for Employment Areas in the County of Wellington by Area Municipality. A long-term land needs assessment is provided for Urban Employment Areas and Rural Employment Areas to the year 2051.

4.1 Introduction

4.1.1 *What are Employment Areas?*

Employment Areas (also known as industrial areas) typically include a broad range of designated lands, including light, medium and heavy industrial lands, business parks and rural industrial lands. Employment Areas 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 County's Employment Areas. Figure 4-1 provides examples of land uses that are permitted within the County's Employment Areas.

Employment Areas form a vital component of Wellington'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 County's largest private-sector employers. Through the development of its industrial land base, the County 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 Wellington County 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 County.



Figure 4-1
County of Wellington
Examples of Employment Area Uses in Wellington County



Images include a trucking operation in Aberfoyle; construction use in Mount Forest; manufacturing use in Mount Forest; a multi-tenant building in Fergus; an industrial mill in Palmerston; and an industrial facility with service bays in Drayton.

4.1.2 Planning for Employment in Employment Areas

As previously discussed in the Phase 1 M.C.R. report, structural changes in the economy are modifying the character of economic activities in Employment Areas and impacting their built form and character. Recognizing these recent structural changes in the regional economy, there is a need for the County to ensure that the amount, type, and location of Wellington's established and planned Employment Areas are well aligned with anticipated market demand. This requires that near-term (i.e., shovel-ready lands) and longer-term land needs are adequately addressed. It also requires that the County's Employment Areas be uniquely planned and designed to accommodate a range of traditional industrial sectors related to manufacturing, Goods Movement, construction and utilities, as well as appropriate commercial and employment-supportive uses.



4.1.2.1 Planning for Integrated Industrial Uses

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.

To address the broad needs of industry, a range of Employment Areas by site size, access, designation/zoning, and surrounding land use is required which will provide significant land area to accommodate mid- to large-scale uses with opportunities for surface parking and future expansion potential. Given the unique operational requirements and industrial focus of these facilities, such uses often cannot be accommodated in commercial or mixed-use settings. In industrial/business parks, integrated industrial facilities are often positioned at gateway locations (i.e., at major highway interchanges) with direct highway access/exposure as well as good connectivity to arterial roads.

4.1.2.2 Planning for Goods Movement Sectors

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. Across North America, the Goods Movement industry is continuously evolving at a rapid pace responding to growing consumer demand as well as increased expectations with respect to speed of delivery. As discussed below, e-commerce and technological improvements represent the biggest drivers of change in the Goods Movement industry, driven by the rapid growth of mobile technology.

4.1.2.3 Planning for Knowledge-Based Sectors

As previously noted, recent market demand on employment lands has been increasingly driven by growth in knowledge-based or creative class economies, including employment sectors such as advanced manufacturing, professional, scientific and technical services, finance and insurance, real estate, information and culture, health care and social assistance, and educational services. As these sectors continue to grow, major office, flex office and multi-purpose facilities encompassing office and



non-office uses are becoming increasingly dominant built forms within Employment Areas.

Both businesses and employees in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores place-making as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and encourage job growth, provided that other necessary infrastructure requirements are met. This is particularly relevant in compact, pedestrian-oriented, mixed-used environments that integrate office commercial, residential and other community uses with public open spaces. Employment Areas should also offer competitive attributes and supportive infrastructure, urban amenities and synergies to attract the growing knowledge-based sector.

4.1.2.4 Planning for Employment-Supportive Uses

The inclusion of serviced commercial and employment-supportive uses relates to the desire to create more complete business parks or industrial areas, as well as to address transitional uses between industrial uses and adjacent Community Areas. Ultimately, the primary intention of employment-supportive uses in Employment Areas should be to serve the needs of employers and employees within the Employment Areas as opposed to the broader population. Although these uses are typically not land extensive, their inclusion in industrial areas could draw clientele from beyond the local area – particularly for services like health care, government, educational institutions or restaurants/drinking places – which could create unintended conflicts within the industrial area/business park. Accordingly, there is a balance needed in the accommodation of employment-supportive uses in Employment Areas, given the potential impacts these uses may have on the County.

4.1.2.5 Major Retail in Employment Areas

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, which in turn may negatively impact the future prospects of an area for industrial development. Although 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.

4.1.2.6 Planning for Rural Employment

While provincial policies require municipalities to direct most of the population and employment growth to settlement areas, a key provincial policy thrust is to support the viability of Rural Areas. As identified in the P.P.S., 2020, opportunities to support a diversified rural economy should be promoted by protecting agricultural and other resource-related uses and directing non-related development to areas where it will minimize constraints on these uses.

Rural Employment Areas are used by municipalities to facilitate the development of rural industrial activities, including those related to the agricultural sector. Rural Employment Areas also provide for the cluster of rural activities that support diversification across the agriculture system. Supporting the agriculture sector within the local municipality is not limited to the Rural Area and should also include opportunities for activities in the urban area that provide connections with the agricultural sector, such as food processing, agriculture research and development, as well as other value-added agriculture commercial activities.

Wellington County has a large base of employment in the Rural Area, including agricultural research facilities and Employment Areas that accommodate dry industrial uses. It is anticipated that the County will continue to accommodate employment opportunities in the Rural Area, as discussed in the County of Wellington Phase 1 M.C.R. Report.

4.1.3 County of Wellington O.P. Policies

The County of Wellington O.P. has two designations for Employment Areas – Rural Employment Areas and Industrial. Provided below is a brief overview of the designations.

Industrial Designation

All lands designated “Industrial” in the County’s O.P. are in settlement areas with full municipal servicing (water/wastewater servicing). These Employment Areas are considered Urban Employment Areas. Permitted uses within the Industrial designation



include manufacturing, processing, fabricating, assembly, warehousing and repair establishments. Public and private services and utilities, transport facilities, storage yards and a municipal sewage treatment plant may also be permitted. Office uses are permitted, as well as certain commercial uses requiring large sites that may not be suitable in a commercial area due to their operation. Such uses may include heavy equipment sales and services, factory or wholesale outlets, mini-warehouses, and truck or auto repair shops.^[1]

Rural Employment Areas

Rural Employment Areas are clusters of “dry” industrial and limited commercial uses that do not use significant amounts of water in their operation and do not produce significant amounts of effluent, consistent with rural servicing levels which rely on private water and sewage systems.^[2] Furthermore, dry industrial and commercial uses requiring large lots, major road access or proximity to rural resources are permitted in Rural Employment Areas. Examples of Rural Employment Areas include the Wallenstein Industrial Area in Mapleton, Teviotdale Industrial Area in Minto and Kerr Industrial Park in Puslinch. All Employment Areas in Guelph-Eramosa and Puslinch are Rural Employment Areas.

4.2 Employment Area Overview

4.2.1 Characteristics of Wellington County’s Employment Areas

4.2.1.1 Land Area of Designated Employment Areas

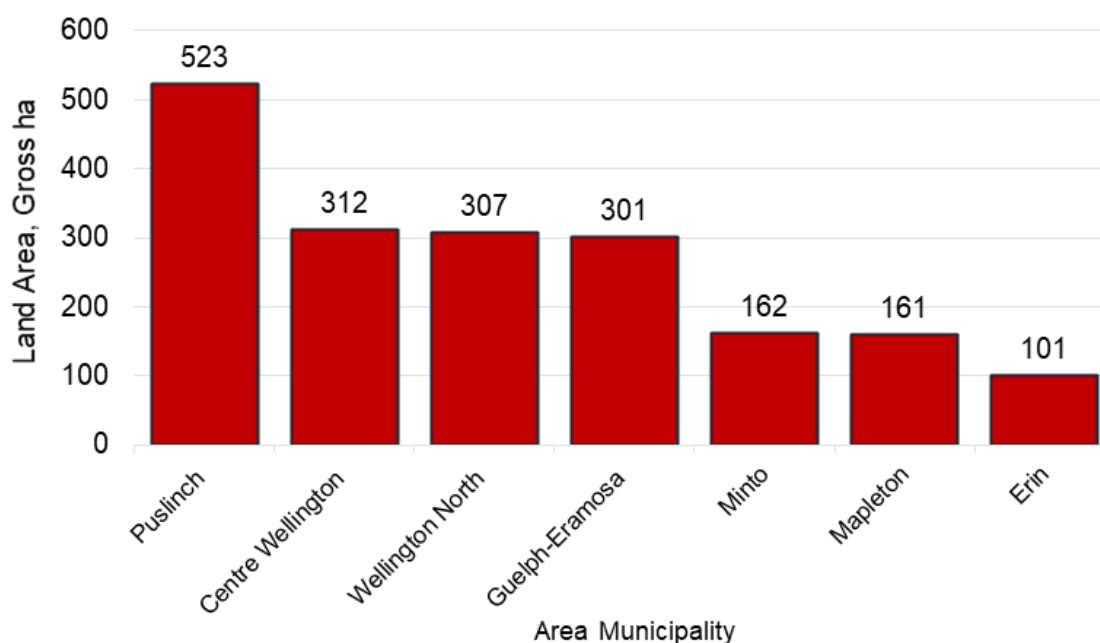
Wellington County has approximately 1,900 ha (4,700 acres) of designated Employment Area lands, including local roads and other internal infrastructure. Figure 4-1 summarizes the County’s designated Employment Areas by Area Municipality. The Township of Puslinch has the largest supply of designated Employment Areas in the County.

^[1] County of Wellington O.P., Policy 8.7.3, p. 108.

^[2] Ibid., Policy 6.8.1, p. 89.



Figure 4-1
County of Wellington
Designated Employment Areas by Area Municipality



Source: Based on County of Wellington Employment Area land supply and summarized by Watson & Associates Economists Ltd.

Urban Employment Areas represent 46% of the designated land supply, while Rural Employment Areas represent 54%. As previously noted, Guelph-Eramosa and Puslinch only offer Rural Employment Area lands, while the remaining Area Municipalities accommodate both Rural Employment Area and Urban Employment Areas. It is estimated that just under half (48%) of the designated Employment Area in the County is developed as of mid-2019.

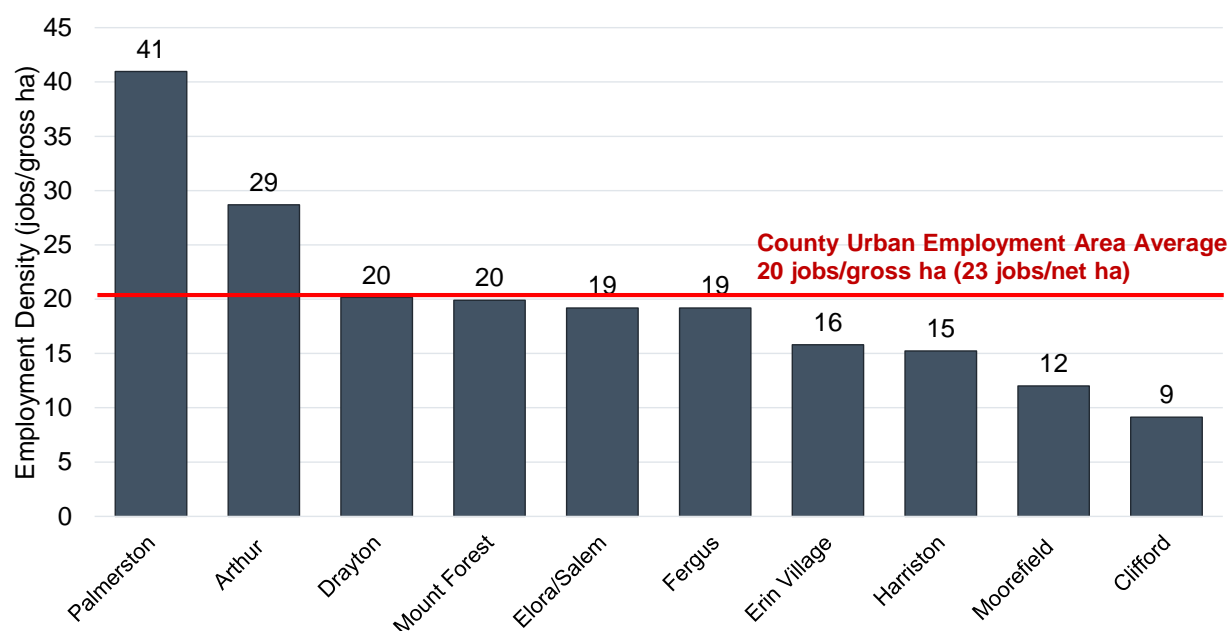
4.2.1.2 Urban Employment Area Density

As summarized in Figure 4-2, the average County employment density on Urban Employment Areas is 20 jobs/gross ha (23 jobs/net ha). The density of Urban Employment Areas ranges from 9 jobs/gross ha in Clifford to 41 jobs/gross ha in Palmerston. The average employment density is high in Palmerston primarily due to TG Minto, a large auto parts manufacturer and one of the County's largest employers. The average density is also high in Arthur largely due to another auto parts



manufacturer (Musashi Auto Parts Inc.). Employment Areas in the County comprise a range of industrial sectors.

Figure 4-2
County of Wellington
Urban Employment Areas Average Employment Density, 2019



Note: Gross density is based on developed parcels and internal infrastructure (e.g., local roads and stormwater ponds).

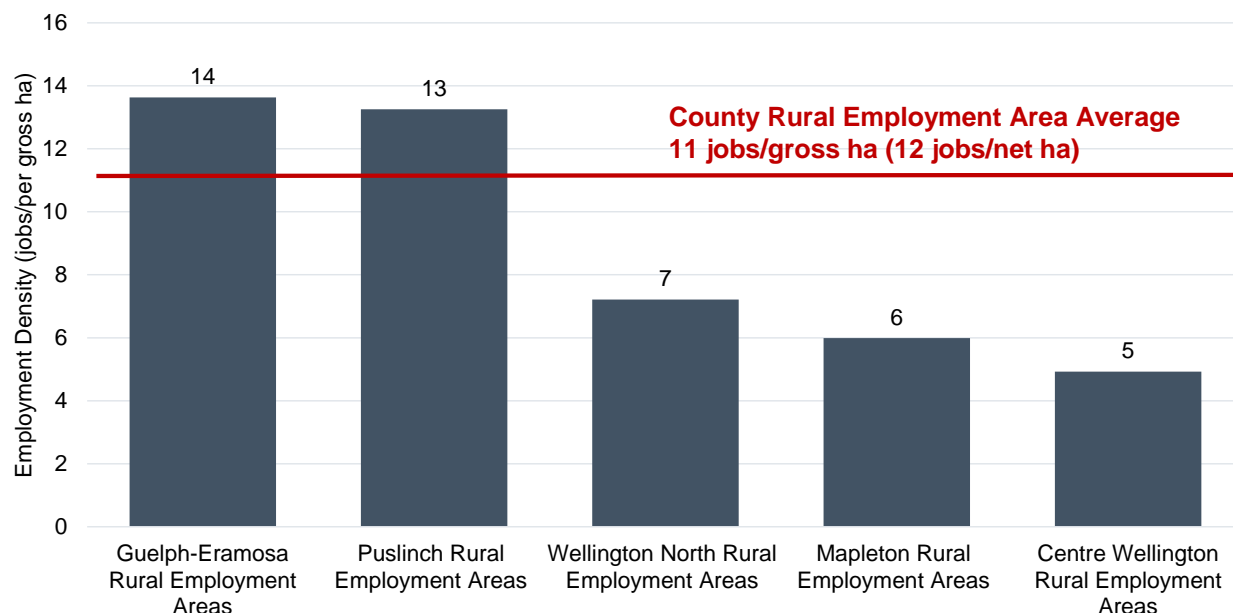
Source: Watson & Associates Economists Ltd.

4.2.1.3 Rural Employment Area Density

The County's average density in Rural Employment Areas is 11 jobs/gross ha (12 jobs/net ha). The Rural Employment Areas in Puslinch and Guelph-Eramosa have the highest employment densities in the Rural Area, as summarized in Figure 4-3. As discussed in the County of Wellington Phase 1 M.C.R. Report, due to its proximity to 401 Highway, Puslinch accommodates a large share of the County's logistics and warehousing sectors. Other Rural Employment Areas include the Wallenstein Industrial Lands in Mapleton which accommodates a manufacturer and agri-industrial businesses.



Figure 4-3
County of Wellington
Rural Employment Areas Average Employment Density, 2019



Gross density is based on developed parcels and internal infrastructure (e.g., local roads and stormwater ponds).

Source: Watson & Associates Economists Ltd.

Appendix G provides an Employment Area density sample for Rural Employment Areas and Urban Employment Areas as of 2020 by Area Municipality and Urban Centre.

4.2.2 Historical Employment Area Land Absorption

4.2.2.1 Land Absorption in Urban Employment Areas

Over the 2011 to 2019 period, Urban Employment Areas absorbed 12 ha (30 acres) of vacant Employment Area lands annually. As summarized in Figure 4-4, absorption was primarily concentrated in Centre Wellington, with approximately 57% of the Employment Area lands absorbed. Notable recent developments include Wellington Perforated in Fergus (distributor of perforated metal), Pintar Manufacturing Corp. (paint materials manufacturer), a new multi-tenant industrial building in Mount Forest, and Tucker Industries (industrial automation specialists) in Palmerston. Employment Areas in Fergus, Mount Forest, Palmerston and Drayton have been active over the past few years with numerous expansions and additions to existing businesses in the County's



Urban Employment Areas, including additional investments from the County's largest employers.

Figure 4-4
County of Wellington
Annual Urban Employment Area
Land Absorption, 2011 to 2019



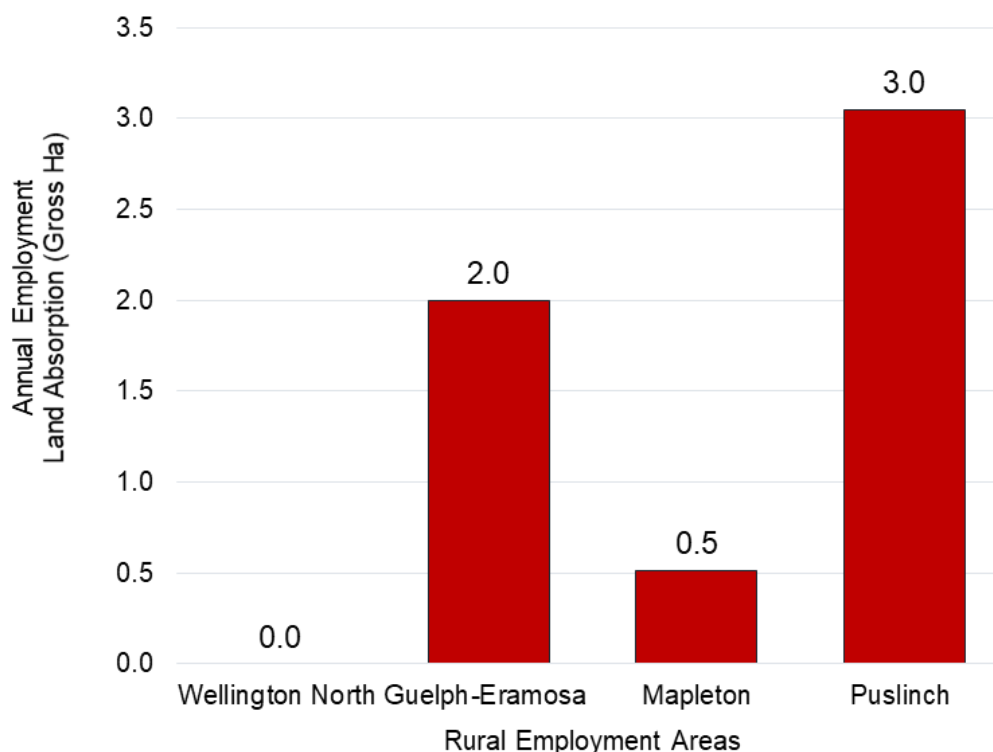
Source: Based on County of Wellington data and review by Watson & Associates Economists Ltd.

4.2.2.2 Land Absorption Rural Employment Areas

Over the 2011 to 2019 period, Rural Employment Areas absorbed 6 ha (15 acres) of vacant Employment Area lands annually. As summarized in Figure 4-5, absorption has primarily been concentrated across Rural Employment Areas in Guelph-Eramosa and Puslinch. Recent land absorption in Puslinch's Rural Employment Areas has primarily included businesses related to logistics/warehousing and construction, while Guelph-Eramosa accommodated a range of industrial uses. Rural Employment Areas in Mapleton absorbed 0.5 ha of Employment Area lands annually. Mapleton has also accommodated several industrial expansions on Rural Employment Area lands, as well as in the Rural Area.



Figure 4-5
County of Wellington
Rural Employment Area
Annual Land Absorption, 2011 to 2019



Source: Based on County of Wellington data and review by Watson & Associates Economists Ltd.

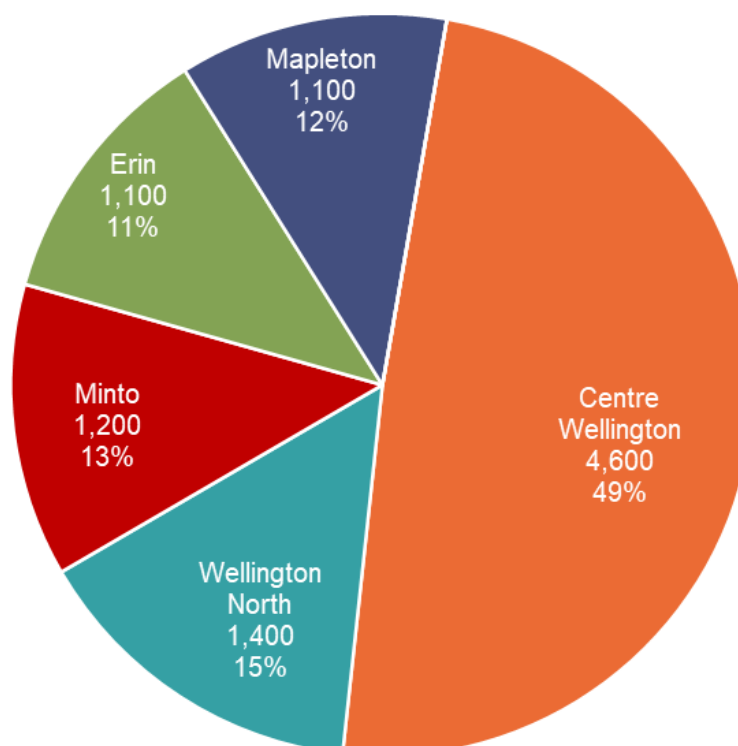
4.3 Employment Area Growth Forecast

4.3.1 Urban Employment Area Growth Forecast

Over the 2020 to 2051 period, Urban Employment Areas are forecast to accommodate 32% of the County's employment growth, representing approximately 9,300 jobs. As summarized in Figure 4-2, approximately 49% of County-wide Employment Area growth is anticipated to be accommodated in Centre Wellington, followed by 15% in Wellington North Employment Areas. Erin, Mapleton and Minto are anticipated to each accommodate between 1,000 and 1,200 Urban Employment Area jobs over the 2020 to 2051 period.



Figure 4-6
County of Wellington
Urban Employment Area Growth Forecast
by Area Municipality, 2020 to 2051



Source: Watson & Associates Economists Ltd.

Employment growth accommodated in Urban Employment Areas is expected to comprise primarily E.L.E. at 80%, while a smaller portion of employment growth will include P.R.E. at 20%. As previously noted, P.R.E. uses in Urban Employment Areas include office uses and employment-supportive uses. The County of Wellington Phase 1 M.C.R. Report provides further details regarding the focus of employment by land use category.

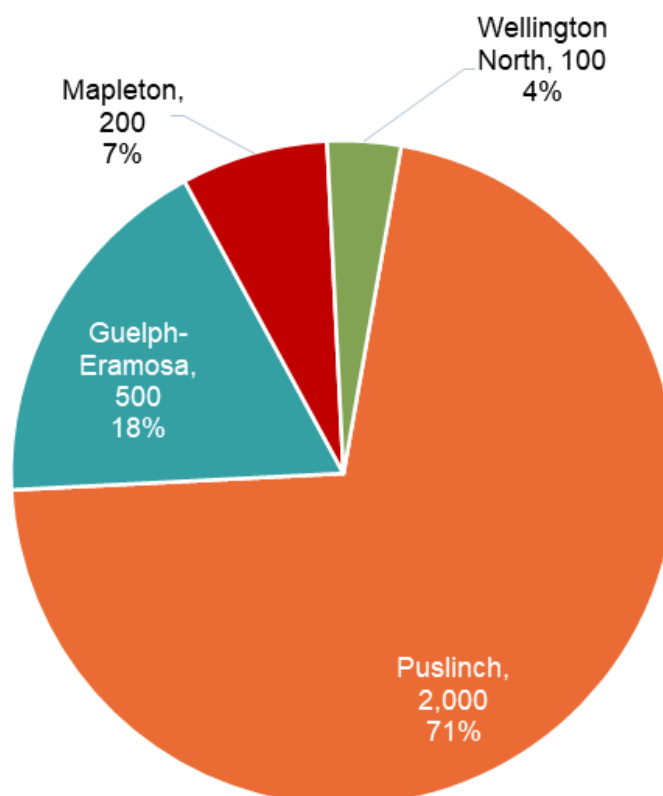
4.3.2 Rural Employment Area Forecast

Rural Employment Areas are anticipated to accommodate 10% of the County's employment growth over the 2020 to 2051 forecast period, representing approximately 2,800 jobs. Most of this growth is allocated to the Township of Puslinch, as summarized



in Figure 4-7. Employment growth accommodated in Rural Employment Areas is expected to comprise primarily E.L.E. at 96%, while a small portion of growth will include P.R.E. at 4%.

Figure 4-7
County of Wellington
Rural Employment Area Growth Forecast
by Area Municipality, 2020 to 2051



Source: Watson & Associates Economists Ltd.

4.4 Employment Area Land Supply

4.4.1 Employment Area Land Supply Inventory Approach

In generating a current employment land inventory for Wellington County, all parcels designated in the County's O.P. as "Industrial" and "Rural Employment Area" have been reviewed. The vacant supply data was prepared by the County of Wellington planning



staff as of mid-2019.^[1] The supply has been reviewed by Watson and adjustments were made where necessary (e.g., the land supply for Minto was revised based on O.P.A. 117 to adjust the urban boundaries of three Urban Centres in Minto). Furthermore, Watson has provided a calculation of the Employment Area land supply based on the Growth Plan, 2019 gross land area definition, which includes internal infrastructure such as local roads and stormwater ponds as well all other developable land area. The land supply excludes environmental features, highways, utilities corridors and cemeteries. As noted, the supply analysis was completed in accordance with provincial L.N.A. requirements.

As part of the analysis and in accordance with the provincial L.N.A. methodology, Watson has applied a land vacancy factor of 20%. This allowance is a necessary downward adjustment to land supply, in order to reflect the fact that it is unlikely 100% of any large area of employment lands will be absorbed in the foreseeable future. There are various reasons for this occurring, including:

- parcels have become landlocked or difficult to access, with poor road visibility;
- parcels are held off the market for speculative reasons, such as selective marketing, expansion of an adjacent site, long-term land banking or proposed land use conversion;
- parcels are unusually expensive to service;
- sites are inefficient in size/shape; and
- sites have physical constraints (i.e., poor soil conditions and sites which have unattractive surroundings or potential land use conflicts).

While not a requirement of the Growth Plan, 2019 and the provincial L.N.A. methodology, Watson has provided a Rural Employment Area land needs and absorption forecast. Appendix G provides detailed tables and mapping of the designated and vacant Urban Employment Area and Rural Employment Area supply as of 2019.

^[1] Employment lands status based on status as of July 1, 2019.



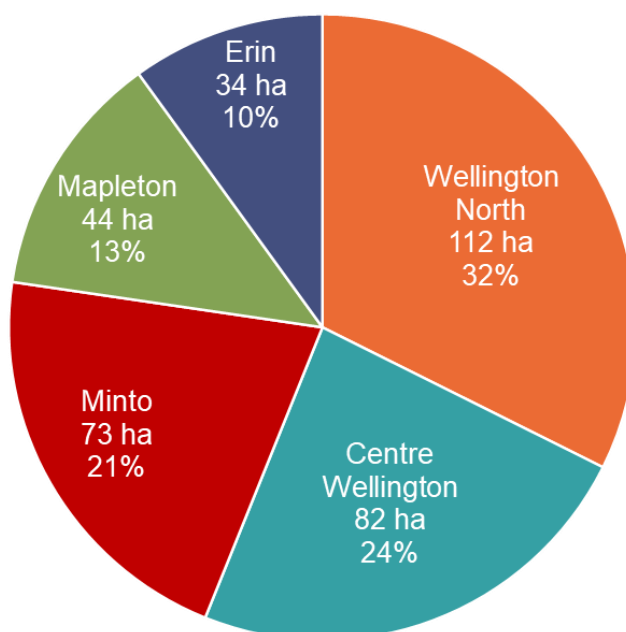
4.5 Urban Employment Area Land Needs to 2051

4.5.1 Employment Area Land Supply, 2019

As of 2019, the County had approximately 431 gross ha of vacant designated lands within its Urban Employment Areas. As previously noted, Watson has applied a land vacancy factor of 20% (downward adjustment) to the vacant land supply. Adjusted for land vacancy, the County's vacant Urban Employment Area land supply is approximately 345 gross ha (supply has been reduced by 86 ha).

As summarized in Figure 4-8, Wellington North has the largest supply of vacant Employment Area land representing one-third (112 ha), followed by Centre Wellington at 82 ha and Minto at 73 ha. Erin and Mapleton, respectively, have 34 ha and 44 ha of vacant Employment Area land.

Figure 4-8
County of Wellington
Urban Employment Areas
Designated Employment Area Supply, 2019



Source: Vacant is based on “designated land area” data provided by the County of Wellington. Adjustments were made to the Town of Minto data based on background information provided by the County on settlement boundary adjustments. Employment land needs utilizes the vacant land supply for Employment Area lands.



4.5.2 Urban Employment Demand to 2051

It is anticipated that the County will accommodate approximately 9,300 additional jobs on Urban Employment Areas over the 2020 to 2051 period. A density of 18 jobs/ha has been utilized, which is slightly lower than the existing density of 20 jobs/ha, to reflect land local and regional trends, as well as the outlook for more land extensive industries such as logistics and warehousing and increased automation in manufacturing. The Urban Employment Area land demand unadjusted for intensification is 514 ha.

Recognizing the opportunity for intensification, it is anticipated that up to 10% of the land demand in Employment Areas will be accommodated through intensification. Intensification may include expansion of existing buildings/operations, infill and redevelopment opportunities. Potential intensification opportunities reduce the uptake of new vacant Employment Area lands from 544 ha to 463 ha.

Figure 4-9
County of Wellington
Urban Employment Areas
Designated Employment Area Supply, 2019

Municipality	Urban Employment Area Growth, 2020 to 2051 A	Density (jobs/gross ha) B	Land Demand, 2020 to 2051 (Gross ha) C = A / B	Land Demand Accommodated Through Intensification (10%), ha D = C x 10%	Land Demand, 2020 to 2051 Adjusted for Intensification E = C - D
Centre Wellington	4,560	18	253	25	228
Wellington North	1,390	18	77	8	70
Erin	1,050	18	58	6	53
Mapleton	1,060	18	59	6	53
Minto	1,190	18	66	7	60
Total Urban Employment Areas	9,250	18	514	51	463

Source: Watson & Associates Economists Ltd.

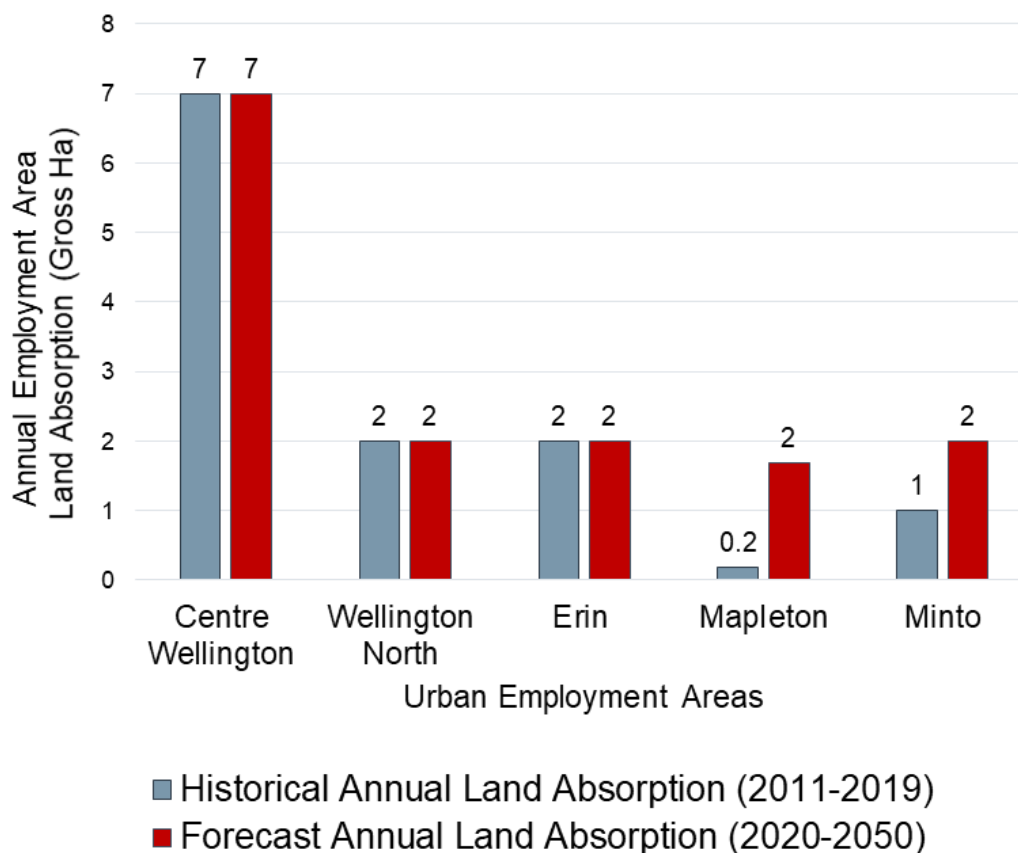
4.5.3 Forecast Urban Employment Area Land Absorption to 2051

Figure 4-10 provides a summary of the Urban Employment Area land absorption forecast to 2051. As illustrated, over the 2020 to 2051 forecast period, Urban



Employment Area land absorption levels are anticipated to be similar to historical levels for most Area Municipalities.

Figure 4-10
County of Wellington
Urban Employment Areas
Annual Urban Employment Area Land Absorption, 2020 to 2051



Source: Watson & Associates Economists Ltd.

4.5.4 Urban Employment Area Land Needs to 2051

Figure 4-11 summarizes the Urban Employment Land Needs to 2051. Key observations include the following:



Shortfall of Urban Employment Area lands to 2051

- Centre Wellington: shortfall of 146 ha
- Erin: shortfall of 23 ha
- Mapleton: shortfall of 9 ha

Surplus of Urban Employment Area lands to 2051

- Wellington North: surplus of 42 ha
- Minto: surplus of 14 ha

Figure 4-11
County of Wellington
Urban Employment Areas
Urban Employment Area Land Needs, 2020 to 2051

Municipality	Land Demand, 2020 to 2051 Adjusted for Intensification	Adjusted Land Supply (Gross ha)	Urban Employment Area Land Needs (Gross ha)
Centre Wellington	228	82	-146
Wellington North	70	112	42
Erin	53	30	-23
Mapleton	53	44	-9
Minto	60	73	14
Total Urban Employment Areas	463	345	-122

Note: Erin land supply includes 5.7 gross ha of deferred lands (Erin O.P.A. 12) that would need to be re-designated as Industrial.

Source: Watson & Associates Economists Ltd.

4.5.5 Urban Employment Area Land Excess

Wellington North has a surplus of 42 ha of Employment Area lands; Minto has a smaller surplus of 14 ha of Employment Area lands.

Phase 3 of the M.C.R. will identify location options and explore planning policies to address excess lands in Wellington North through consultation with the Township.

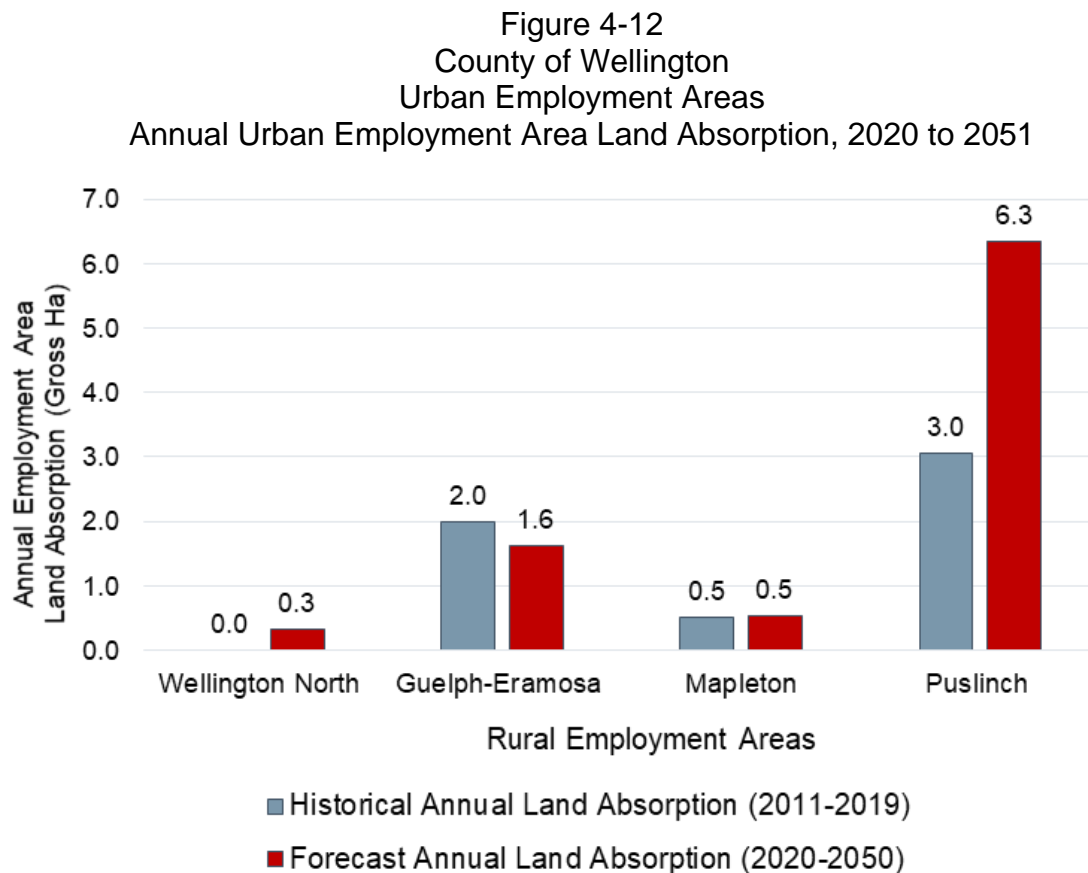


Based on preliminary findings and discussions with Township staff, it is anticipated that up to 42 ha of excess Employment Area land could be identified in Mount Forest.

4.6 Rural Employment Area Land Needs to 2051

4.6.1 Forecast Rural Employment Area Land Absorption to 2051

As previously discussed, over the 2020 to 2051 period, Rural Employment Areas are anticipated to accommodate 2,800 jobs. Based on an employment density of 10 jobs/ha, which is slightly lower than historical density levels (11 jobs/ha), forecast land demand for Rural Employment Areas is 278 ha or 9 ha annually. Figure 4-12 provides a summary of the Rural Employment Area Land absorption forecast to 2051. As illustrated, forecast land absorption levels are anticipated to be higher than historical levels for Puslinch and slightly lower for the other Area Municipalities.



Source: Watson & Associates Economists Ltd.



4.6.2 Rural Employment Area Land Requirements to 2051

As summarized in Figure 4-13, Puslinch has a shortfall of approximately 30 ha of Rural Employment Area lands to accommodate forecast employment growth to 2051.

Mapleton has a sufficient supply of Rural Employment Area lands to accommodate the Rural Employment Area forecast, while Wellington North and Guelph-Eramosa have a surplus. It should be noted that identifying excess Rural Employment Areas is not required for Rural Areas. The County of Wellington Phase 3 M.C.R. Report will explore options in accommodating the shortfall of Rural Employment Area lands in Puslinch.

Figure 4-13
County of Wellington
Rural Employment Areas
Rural Employment Area Land Needs to 2051

Municipality	Employment Growth, 2020 to 2051	Employment Density (jobs/ha)	Employment Demand, ha	Vacant Land Supply, ha (adjusted for 20% Land Vacancy)	Land Required (Shortfall)/ Surplus, ha
Centre Wellington	0	10	0	0	0
Wellington North	100	10	10	45	35
Guelph-Eramosa	510	10	51	279	227
Erin	0	10	0	0	0
Mapleton	170	10	17	21	4
Minto	0	10	0	0	0
Puslinch	2,000	10	200	170	(30)
Total Rural Employment Area	2,780	10	278	514	236

Source: Watson & Associates Economists Ltd.

4.7 Urban and Rural Employment Area Recommendations

This chapter provided an assessment of the County's long-term Urban and Rural Employment Area land needs. It is important to recognize that the Growth Plan, 2019 approaches Settlement Area Boundary Expansions differently for the Urban and Rural



Areas. An assessment of the Rural Employment Area has been provided to the County and its Area Municipalities for planning purposes.

The recommended Urban Employment Area density target for Wellington County is 18 jobs/ha. A lower density target of 10 jobs/ha should be considered for the Rural Employment Areas in the County. The density targets recognize a trend towards lower densities reflective of land extensive industries (Goods Movement), as well as an increase in automation in the manufacturing sector.

It is anticipated that Employment Areas will continue to be an important component of the County's economic base, as discussed in the County of Wellington Phase 1 M.C.R. Report. Based on the comprehensive analysis carried out herein, it has been determined that the County has an overall shortfall of approximately 178 gross ha of designated Urban Employment Areas to 2051. Accordingly, the County will need to expand its Urban Settlement Area boundaries to accommodate additional Employment Area lands in Centre Wellington, Mapleton and Erin. Recognizing differences in local urban land supply and demand across the County, it is recommended that all or a significant portion of the 42-ha surplus of Employment Area lands in Wellington North be identified as Excess Lands. The Town of Minto has a surplus of 14 ha of Employment Area lands.

As discussed further in Chapter 5, it is recommended based on a review of potential Employment Area conversion sites that three sites be converted to non-employment use in Centre Wellington. **As a result, the Employment Area lands are increased from 178 ha to 192 ha. Within Centre Wellington the Community Area land needs are reduced from 146 ha to 160 ha.**

Phase 3 of the County of Wellington M.C.R. will explore the following for Employment Areas:

- Location options for 192 ha of an S.A.B.E. based on the results of this Phase 2 study;
- Location options for 42 ha of identified Excess Lands in Wellington North (lands that are currently designated as industrial);
- The development of a policy approach to manage Excess Lands in the County O.P. (i.e., Excess Lands policy overlay);



- Addressing Rural Employment Area land needs of approximately 30 ha within the Township of Puslinch; and
- Additional policy considerations.



Chapter 5

Urban Employment Area Conversion Review



5. Urban Employment Area Conversion Review

5.1 What is an Employment Area Conversion?

Changes to the designation of a site identified in the County's O.P. as "Industrial" to allow for uses not permitted for that designation, including residential, mixed and specific commercial uses, is considered an Employment Area land conversion. The conversion of Employment Area lands generally occurs during the M.C.R. process as there is a need to understand the broader impacts of the conversion under the policy framework of the Growth Plan, 2019 and the P.P.S., 2020, as well as local site-specific considerations. As part of this M.C.R., Employment Area conversion requests have been reviewed and evaluated.^[1] Based on this review, recommendations have been made with respect to six site areas within the Urban Employment Areas where conversion requests have been submitted.

5.2 Policy Context

The Growth Plan, 2019 and the P.P.S., 2020 provide a policy framework to review Employment Area conversion to non-employment use. According to Growth Plan, 2019 policy 2.2.5.9,

"the conversion of lands within employment areas to non-employment uses may be permitted only through a municipal comprehensive review where it is demonstrated that:

- a) there is a need for the conversion;
- b) the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
- c) the municipality will maintain sufficient employment lands to accommodate forecasted employment growth to the horizon of this Plan;
- d) the proposed uses would not adversely affect the overall viability of the employment area or the achievement of the minimum

^[1] Refer to sections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.



intensification and density targets in this Plan, as well as the other policies of this Plan; and

- e) there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.”^[1]

5.3 Approach

As part of its M.C.R. process, the County of Wellington invited landowners to submit requests for properties that are currently designated for employment to be converted to permit non-employment uses. Submissions were due to the County by May 3, 2021. All requests have been reviewed and evaluated against the County's developed criteria for Employment Area conversion, which is based on provincial policies and County of Wellington objectives (refer to Appendix H for conversion criteria). As indicated to landowners, there is no guarantee that requests will result in a staff recommendation and/or Council's decision to convert employment lands to non-employment uses.

In total, the County has received four formal submissions to convert specific Employment Area sites to non-employment uses. In addition, based on discussions with the County and Area Municipalities, two other Employment Area sites, one in Fergus and one in Mount Forest, were reviewed to explore merits of conversion to non-employment uses. In total 79 ha of designated Employment Area lands were reviewed. Sites include vacant as well as developed lands within Employment Areas. As previously mentioned, these lands have been evaluated based on the provincial framework, as well as local criteria and principles drawing on the following:

- A review of best practices across the G.G.H.;
- Relevant provincial planning policies and supporting documents related to the Growth Plan, 2019 and the P.P.S., 2020; and
- The evolving nature of Employment Areas within the County of Wellington with respect to land use, economy and transportation.

5.3.1 Criteria Evaluation

Building on the provincial policy framework and County principles for Employment Areas, local conversion criteria has been established as part of the evaluation of

^[1] Growth Plan, 2019, policy 2.2.5.9, p. 20.



Employment Area land conversions. This local evaluation framework has been designed to address the local site characteristics of Employment Areas within Wellington County with respect to site size, physical constraints, access, connectivity and configuration, land use compatibility issues, economic viability infrastructure and local municipal interests. A key emphasis of the localized criteria relates to the quality of Employment Area lands. This approach recognizes that in certain circumstances an Employment Area conversion may be recommended in the face of a localized or County-wide Employment Area land needs shortfall by 2051, if determined that the local site attributes of the subject lands do not support a feasible long-term outcome for industrial-type development. Again, it is noted that these principles were developed using policy directions and guidance from the P.P.S., 2020 and the Growth Plan, 2019, and reference best practices in protecting, planning, and developing employment lands. Provided below are the localized criteria:

5.3.2 Localized Conversion Criteria

- 1) The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.

The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers, and minimum separation standards within both rural and urban settings.

- 2) The site should not be adjacent to or in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).
- 3) The site should be located outside or on the fringe of an assembly of Employment Areas.
- 4) The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints, etc.
- 5) Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.



- 6) The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.
- 7) The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.
- 8) The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.
- 9) The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.
- 10) The conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.
- 11) The conversion request demonstrates total job yield of the site can be maintained or improved.

5.4 Employment Area Conversion Requests Reviewed

Figure 5-1 summarizes the Employment Area land conversion requests received and reviewed as part of this M.C.R. In total, six sites were reviewed representing approximately 64 ha which includes vacant and developed sites. As previously discussed in Chapter 4, there is a surplus of urban Community Area and Employment Area lands in Wellington North and a shortfall of urban Community and Employment Area lands in Centre Wellington. Notwithstanding the land need results of the Centre Wellington and Wellington North's urban land supply, it is important that all vacant lands which form part of the County's Employment Area inventory are available, serviceable and marketable over the long-term planning horizon. If it is determined that a site is not feasible for Employment Area land development and the conversion of such a site supports the County's local planning principles, such lands will be considered for conversion regardless of long-term Community Area and Employment Area land need.



Figure 5-1
County of Wellington
Conversion Request Sites Reviewed

Site	Site Location	Employment Area	Land Area, ha	Conversion Request
Site 1	22 Park Road (B.U.A.)	Elora South Employment Lands	1.3 ha (1 parcel)	Highway Commercial
Site 2	6408, 6410, 6420 and 6430 Beatty Line (D.G.A.)	Beatty Line and Hill Employment Area	8.8 ha (4 parcels)	Highway Commercial and Mixed-Use
Site 3	East of Beatty Line and South of Garafraxa Street (B.U.A.)	Beatty Line and Hill Employment Area	24 ha (18 parcels)	Mixed-Use
Site 4	350 Foster Street (B.U.A.)	Mount Forest Northwest Employment Lands	0.4 ha (1 parcel)	Residential
Site 5	East of Highway 6 and North of Sligo Road (D.G.A.)	Mount Forest Northeast Employment Lands	21 ha (2 portions of 1 parcel)	Residential and Highway Commercial (small portion)
Site 6	510 Eliza Street (D.G.A.)	Arthur Industrial Lands	8 ha (1 parcel)	Residential and Highway Commercial
Total County of Wellington	-	-	64 ha	-

Source: Watson & Associates Economists Ltd.

5.5 Employment Area Conversion Review

5.5.1 Site 1 – 22 Park Road, South Elora Employment Area (Centre Wellington)

This site of approximately 0.7 ha is a part of the South Elora Employment Area in the Elora Urban Centre. The applicant is seeking the conversion of this site from Employment Area uses to Highway Commercial Uses. Figure 5-2 provides a map of the location of the site within the South Elora Employment Lands.



5.5.1.1 *Employment Area Conversion Site Assessment*

1) There is a need for the conversion.

As previously discussed, there is a need to accommodate additional Community Area and Employment Area lands in Elora. The site is in the B.U.A. and does not directly impact D.G.A. Community Area land needs. The proposed use is Highway Commercial and would increase the commercial land supply. Based on the Commercial Land Needs analysis in Chapter 3, Elora has a small surplus of commercial lands to 2051 of approximately 5 ha.

2) The lands are not required over the horizon of the Plan (2051) for employment purposes for which they are designated.

Elora and Fergus require all vacant Designated Employment Area lands over the horizon of the Growth Plan, 2019. Any changes to the designated land supply may require an adjustment to the S.A.B.E. requirements.

3) The municipality will maintain sufficient employment lands to accommodate forecasted growth to the horizon of the Growth Plan.

Due to the site's size (less than 1 ha), the site does not have a significant impact on Employment Area land needs. The conversion of the subject site to a non-employment use would not impede the development potential of the Elora South employment lands in Elora.

4) The proposed use would not adversely affect the overall viability of the Employment Area.

The conversion of the subject site would not have an impact on existing Employment Area uses as the site is adjacent to vacant and developed commercial uses. Employment Area uses along Park Road include permitted commercial uses in the Employment Area designation. Stirling Marathon Appliances, a major employer, is in proximity; however, it is situated on a large site across the street from the site.



5) The achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Growth Plan.

The proposed development concept would not undermine density and intensification targets.

6) There are existing or planned infrastructure and public service facilities to accommodate the proposed use(s).

The site would expand upon the Wellington Road 7 commercial corridor in Elora.

7) The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.

The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers, and minimum separation standards within both the rural and urban setting.

The site is adjacent to vacant and developed commercial uses and would not introduce a new use to the area.

8) The site should not be adjacent to or in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).

The site is situated on an internal road, Park Road. There are plans for a road extension of this collector road, as identified in the Township of Centre Wellington Transportation Master Plan, January 2019, to 1 Line which would improve accessibility to the Employment Area uses in the area, by allowing an alternative access outside the Employment Area and better connection to Wellington Road 7. Wellington Road 7, a major road that serves the Employment Area is identified as a preferred truck by-pass route in the Township of Centre Wellington Transportation Master Plan; however, this road is also an important road for commerce, as it supports traffic from the Elements Casino Grand River.



9) The site should be located outside or on the fringe of an assembly of Employment Areas.

The subject site is located within an Employment Area and forms a small portion of the Employment Area.

10) The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints, etc.

Provided below is a summary of the site characteristics:

- The subject site is a parcel that is less than 1 ha in size and is considered a small parcel.
- The subject site is surrounded by established and vacant commercial uses.
- Due to size and adjacent uses, the site offers limited opportunities for Employment Area uses.
- The site, as a Highway Commercial site, would integrate within the commercial corridor of the area.

11) Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.

The site is located within an established portion of the Employment Area.

12) The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.

The subject site represents a small parcel and has no risks impacting the viability of the vacant Employment Area supply in Elora.

13) The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public



service facilities, location along a major arterial and the opportunity to support a range of housing options.

The subject site is not located on a brownfield site.

- 14) The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.**

The site would contribute towards the supply of commercial lands in an already established commercial corridor.

- 15) The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.**

The subject site is not located near a neighbouring municipal or County jurisdiction.

- 16) The conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.**

The site is adjacent to commercial uses and a vacant commercial site. The site would not introduce a new commercial area.

- 17) The conversion request demonstrates total job yield of the site can be maintained or improved.**

The development concept as a commercial site would generate jobs.

5.5.1.2 Employment Area Conversion Site Recommendation

It is recommended that the County convert the site to Highway Commercial Use, with no permissions for residential uses (Highway Commercial generally permits residential uses subject to a criteria and zoning). The proposed use would integrate well within the established commercial corridor and would have a minimal impact on the Employment Area land supply and adjacent uses.



Based on this recommendation, the land needs are impacted as follows:

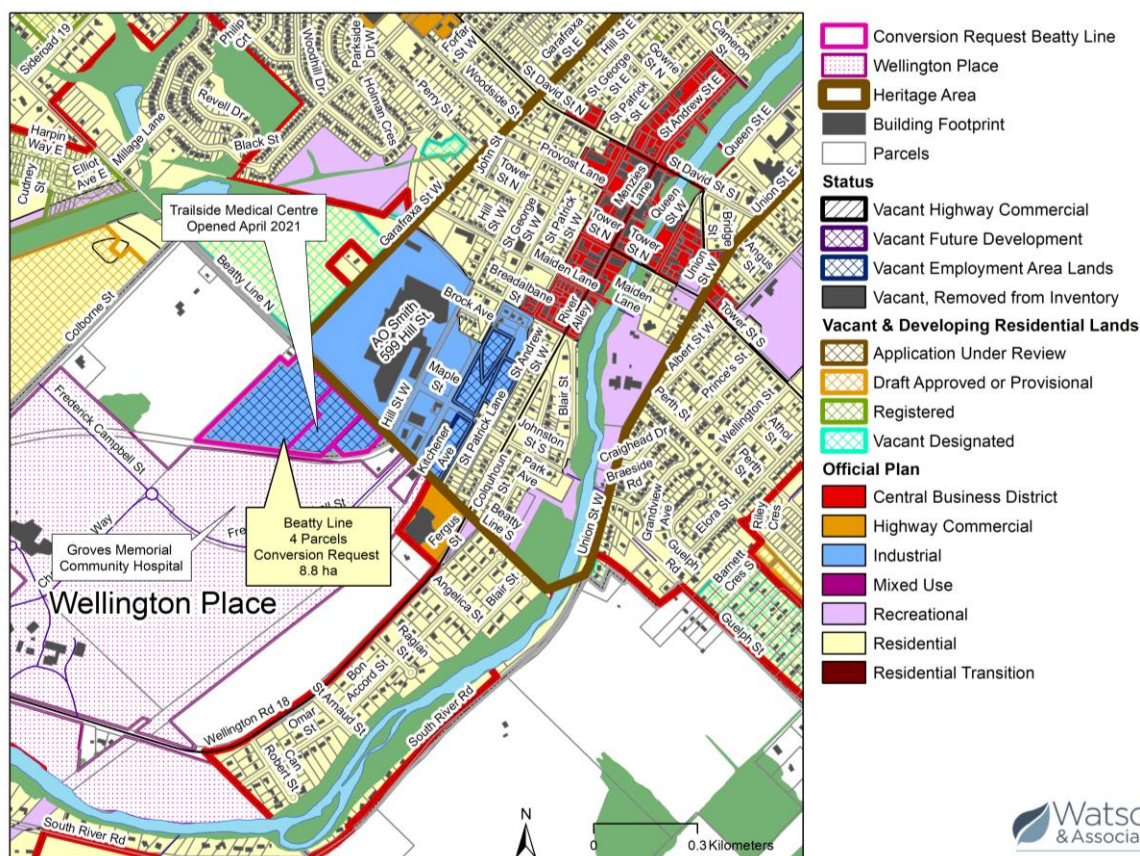
- Employment Area: Requires an additional 1 ha of Employment Area S.A.B.E.
- Community Area: Contributes towards commercial supply opportunities in the B.U.A. No impact on Community Area land needs.

5.5.2 Site 2 – 6408, 6410, 6420 and 6430 Beatty Line, Fergus Beatty Line and Hill Employment Area

The site area is approximately 9 ha and is a part of the Beatty Line and Hill Employment Area in the Fergus Urban Centre. The site comprises four parcels, including the recently developed Trailside Medical Centre, which opened in April 2021. The conversion request for this area was initiated by one of the property owners. The Township of Centre Wellington has requested a study of the entire area as part of the review. Figure 5-4 is a map showing the site's location within the Employment Area.



Figure 5-4
County of Wellington
Fergus Urban Centre – Beatty Line and Hill Employment Area
Employment Area Land Conversion Request



While the site is within the D.G.A., the developed portion of the Beatty Line and Hill Employment Area to the east is a mature Employment Area. To the south of the Employment Area is the Wellington Place special policy area which is outside the urban boundary of Fergus and Elora. Wellington Place currently includes the new Groves Memorial Community Hospital and is planned as a major institutional node for Centre Wellington. Further south of the site is a commercial area, St. Andrews West Mall. To the north of the site are vacant lands outside the urban boundary. The area surrounding the developed portion of the Beatty Line and Hill Employment Area consists of the Fergus C.B.D. and mature residential neighbourhoods which are within the Heritage Area overlay in the Township of Centre Wellington O.P.



5.5.2.1 *Employment Area Conversion Site Assessment*

1) There is a need for the conversion.

As previously discussed, there is a need to accommodate additional Community Area and Employment Area lands in Fergus. The site is in the D.G.A. and would impact D.G.A. Community Area land needs by reducing the need for an S.A.B.E. for the Community Area by 9 ha. The proposed use is Highway Commercial and mixed use, and the site would also have the potential to increase the commercial land supply. Based on the Commercial Land Needs analysis in Chapter 3, Fergus has a small surplus of commercial lands to 2051 of approximately 5 ha; however, any changes to the South Fergus Secondary Plan in terms of commercial supply potential may result in a commercial land need for Fergus.

Conversion of the site to a non-Employment Area use would reduce the Employment Area land supply by 9 ha and require an additional 9 ha be added to the Employment Area lands for Centre Wellington. It is important to note that the site already includes a developed use, the Trailside Medical Centre which is a permitted use within the Industrial O.P. designation. The Employment Area land supply is as of July 2019 and the medical centre site is considered vacant in the Employment Area supply.

2) The lands are not required over the horizon of the Plan (2051) for employment purposes for which they are designated.

Elora and Fergus require all vacant designated Employment Area lands over the horizon of the Growth Plan, 2019. Any changes to the designated land supply may require an adjustment to the S.A.B.E. requirements.

3) The municipality will maintain sufficient employment lands to accommodate forecasted growth to the horizon of the Growth Plan.

Due to the location of the site, adding an additional 9 ha S.A.B.E. for Employment Area land and reducing the Community Area land needs by 9 ha for an S.A.B.E. is considered a better utilization of lands within the Fergus Urban Centre.



4) The proposed use would not adversely affect the overall viability of the Employment Area.

The conversion of the subject site would not have an impact on existing Employment Area uses. Existing Employment Area uses are not adjacent to the site and the site is already surrounded by a sensitive use, a major institutional node.

5) The achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Growth Plan.

The proposed use would not undermine density and intensification targets. While the site is within the D.G.A., it has the potential to accommodate residential uses and mixed uses near established commercial and institutional nodes, and due to location may accommodate a range of housing options (low-, medium- and high-density housing).

6) There are existing or planned infrastructure and public service facilities to accommodate the proposed use(s).

The site is surrounded by public amenities and provides the opportunity to add residential and mixed-uses to an area that already has established amenities.

7) The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.

The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers, and minimum separation standards within both the rural and urban setting.

There are already sensitive uses in the area, including a developing institutional node with a hospital.

8) The site should not be adjacent to or in proximity to major transportation corridors (e.g., highways, Goods Movement network, cross jurisdictional



connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).

The site is not near a highway and is situated in an area that is largely functioning as a Community Area.

9) The site should be located outside or on the fringe of an assembly of Employment Areas.

The site is located in an Employment Area. On the other side of the road, opposite Beatty Line, is a mature industrial area with one large industrial use and several commercial uses.

10) The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints, etc.

Provided below is a summary of the site characteristics:

- The site area is approximately 9 ha, and a portion of the site is already developed for a medical centre; however, the size of the remaining parcels may provide an opportunity for a small industrial operation.
- The site area is not in proximity to a highway; employment uses, existing employee and trucking traffic would have to access roads within the C.B.D. or surrounding residential areas.
- There are already sensitive uses in the area; an institutional node with a hospital limits the range of employment uses.

11) Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.

This portion of the Employment Area has not yet established an Employment Area presence. As previously noted, recent uses include a medical centre.



12) The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.

The conversion of the subject site would require that additional urban lands are added to the Township of Centre Wellington to account for the loss of Employment Area lands at this location. Converting these lands would provide an opportunity to strategically add Community Area lands in areas that support complete community principles, while increasing the opportunity to add an equivalent Employment Area land supply at a preferred location through increasing the municipality's S.A.B.E. requirements for Employment Areas.

13) The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.

The westerly parcel is a brownfield site as it is the location of a former landfill.

14) The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.

The site would contribute towards the function of the neighbouring C.B.D. and Wellington Place by providing uses that are complementary to the area.

15) The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.

The subject site is not located near a neighbouring municipal or County jurisdiction.



16) The conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.

This site will not comprise the planned commercial structure. It is recommended that a mixed-use designation be considered for this area to complement existing uses.

17) The conversion request demonstrates total job yield of the site can be maintained or improved.

The conversion may provide an opportunity to increase job yield if designated for mixed uses or highway commercial uses.

5.5.2.2 Employment Area Conversion Site Recommendation

It is recommended that the County convert the site to a mixed-use or highway commercial designation, with opportunities for residential and commercial uses. The proposed conversion would provide the opportunity to integrate into the surrounding area and provide a complementary function. Based on this recommendation, the land needs are impacted as follows:

- Employment Area: Requires an additional 9 ha of Employment Area S.A.B.E.
- Community Area: Reduces land needs requirement by 9 ha for Community Area

5.5.3 Site 3 – East of Beatty Line/Garafraxa Street – Fergus Beatty Line and Hill Employment Area

The site area is approximately 24 ha and is a part of the Beatty Line and Hill Employment Area in the Fergus Urban Centre. The site was included based on discussions with the Township of Centre Wellington and County of Wellington planning staff. The site includes 18 parcels:

- Parcels with industrial uses: 3 (land area: 16.2 ha)
- Parcels with commercial services use: 4 (land area: 1.8 ha)
- Parcels with residential uses: 5 (land area: 0.6 ha)
- Parcels used for parking: 1 (land area: 1.6 ha)
- Parcel that are vacant: 5 (land area: 3.8 ha)



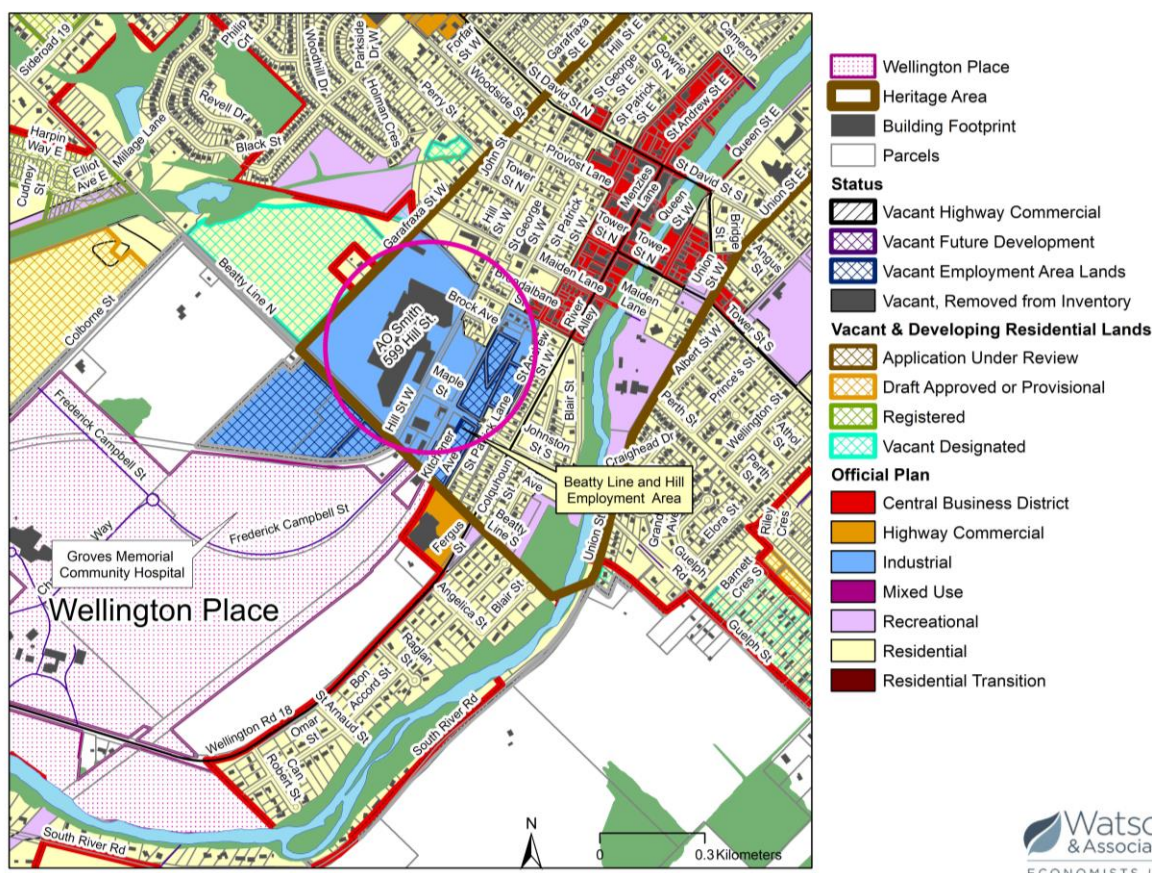
The largest use in the Employment Area site includes AO Smith (599 Hill Street), an industrial use operating in a heritage building. The land area of the site at 599 Hill Street is approximately 13 ha and also utilizes a parking lot of approximately 1.6 ha. The remaining uses include small commercial and industrial uses. In addition, a small portion includes residential uses that are part of a mature neighbourhood.

The site is in the B.U.A. and within the Heritage Area overlay identified in the Township of Centre Wellington O.P. Furthermore, the Township has identified 599 Hill Street (AO Smith) as a priority site (as of 2019), designated under a Community Improvement Plan (C.I.P.) eligible for Tax Increment Equivalent Grants.^[1]

^[1] Township of Centre Wellington, Priority Sites Designated under the Community Improvement Plan Eligible for Tax Increment Equivalent Grants, Township of Centre Wellington website: <https://www.centrewellington.ca/en/doing-business/resources/Documents/EconomicDevelopment/Priority-sites---2019-report.pdf>, accessed February 28, 2022.



Figure 5-5
County of Wellington
Fergus Urban Centre – Beatty Line and Hill Employment Area
Employment Area Land Conversion Review



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5.5.3.1 Employment Area Conversion Site Assessment

1) There is a need for the conversion.

As previously discussed, there is a need to accommodate additional Community Area and Employment Area lands in Centre Wellington. The site is in the B.U.A. and the conversion of this site to non-employment uses would contribute towards the commercial and intensification housing supply potential. The conversion of the site to non-employment would have a small impact on employment land needs as the site only includes approximately 4 ha of vacant land.

Based on a discussion with Township of Centre Wellington and County of Wellington planning staff, this review is intended to assess whether this site



should be encouraged to transition from Employment Area uses to Community Area uses over the long-term horizon (to 2051).

2) The lands are not required over the horizon of the Plan (2051) for employment purposes for which they are designated.

Elora and Fergus require all vacant designated Employment Area lands over the horizon of the Growth Plan, 2019. Any changes to the designated land supply may require an adjustment to the S.A.B.E. requirements.

3) The municipality will maintain sufficient employment lands to accommodate forecasted growth to the horizon of the Growth Plan.

The conversion of the site will require an additional 4 ha of S.A.B.E. for the Employment Area within Centre Wellington.

4) The proposed use would not adversely affect the overall viability of the Employment Area.

The site includes a large operating industrial use. Transitional policies should be provided to ensure that existing operating businesses are protected.

5) The achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Growth Plan.

The proposed use would support the intensification target by increasing intensification opportunities for the Township. The site has the potential to accommodate residential uses and mixed uses near established commercial and institutional nodes, and due to its location may accommodate a range of housing options (low-, medium- and high-density housing).

6) There are existing or planned infrastructure and public service facilities to accommodate the proposed use(s).

The site is surrounded by public amenities and provides the opportunity to add residential and mixed uses to an area that already has established amenities.



7) The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.

The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers, and minimum separation standards within both the rural and urban settings.

The northern portion of the site (AO Smith, 599 Hill Street) is a large lot and is buffered. The southern portion of the site is more integrated with Community Area lands, limiting the range of industrial uses.

8) The site should not be adjacent to or in proximity to major transportation corridors (e.g., highways, goods movement network, cross jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).

The site is not near a highway, and it is situated in an area that is largely functioning as a Community Area.

9) The site should be located outside or on the fringe of an assembly of Employment Areas.

The site area is not on the fringe of an assembly of an Employment Area.

10) The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints etc.

Provided below is a summary of the site characteristics:

- The site is surrounded by a mature Community Area within a Heritage Area O.P. overlay.
- The site is not in proximity to a highway and employment uses; employee and trucking traffic would have to access roads within the C.B.D. or surrounding residential areas.



- The remaining vacant lands total 4 ha and due to size and location would not accommodate a broad range of industrial uses.
- The large industrial use in the Employment Area is in a building with identified heritage interest and would have limitations on redevelopment for industrial uses.
- There are already sensitive uses in the area to the south and east.

11) Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.

The site is mature Employment Area.

12) The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.

The site would require that the County add additional Employment Areas to the S.A.B.E. requirements. Converting these lands would make it possible to strategically add housing and mixed-use intensification opportunities in the area, which supports complete community principles, while increasing the chance to add the equivalent Employment Area land supply at a preferred location through expanding the S.A.B.E. requirements for Employment Areas.

13) The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.

The Township of Centre Wellington has identified this site as a priority site within a C.I.P. eligible for Tax Increment Equivalent Grants.



- 14) The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.**

The site would contribute towards the function of the neighbouring C.B.D. and Wellington Place by providing uses that are complementary to the area.

- 15) The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.**

The subject site is not located near a neighbouring municipal or County jurisdiction.

- 16) The conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.**

It is recommended that a special policy be considered for this site that would allow opportunities for this area to transition to mixed-uses that complement surrounding existing uses.

- 17) The conversion request demonstrates total job yield of the site can be maintained or improved.**

The conversion may provide an opportunity to increase job yield if designated for mixed use.

5.5.3.2 Employment Area Conversion Site Recommendation

It is recommended that the County and Township consider a special policy that would allow this Employment Area to transition to uses that would complement the surrounding area. Based on this recommendation, the land needs are impacted as follows:

- Employment Area: Requires an additional 4 ha of Employment Area S.A.B.E.
- Community Area: Increases intensification opportunities

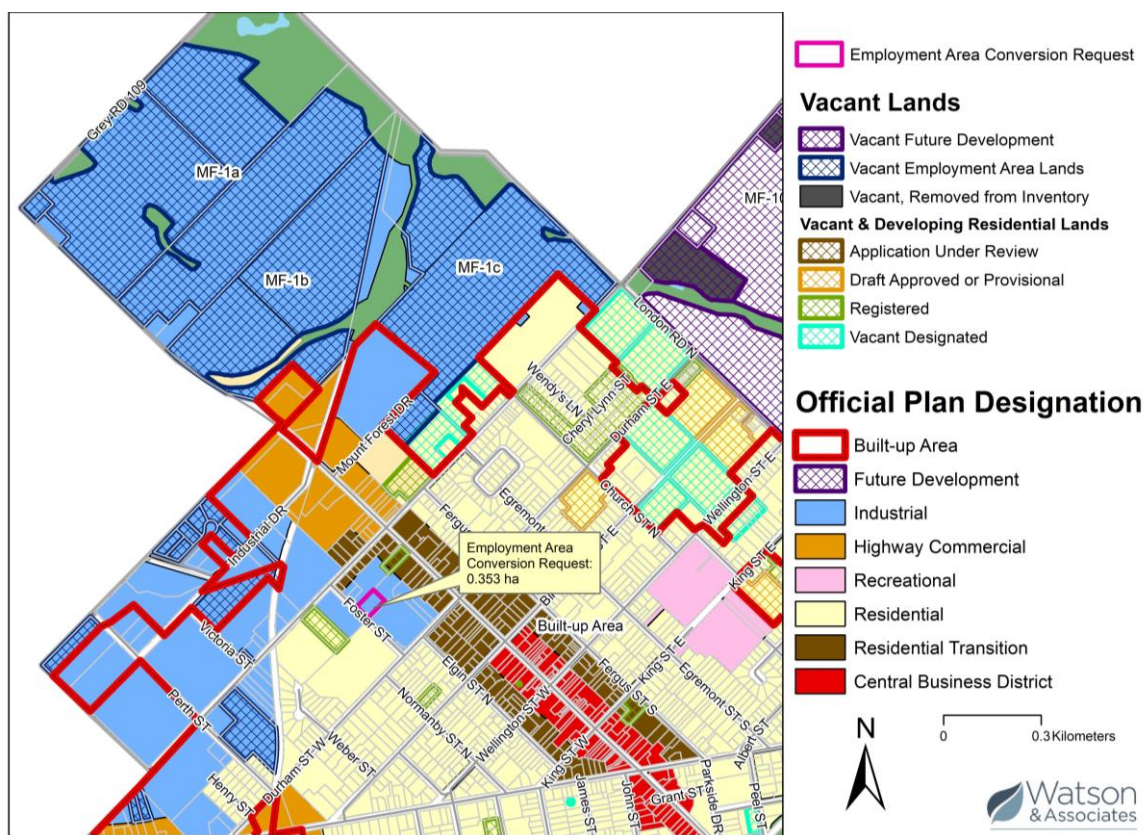


5.5.4 Site 4 – 350 Foster Street – Mount Forest Northwest Employment Area

This site area of approximately 0.4 ha forms part of the Northwest Employment Area in the Mount Forest Urban Centre. The applicant is seeking the conversion of this site from Employment Area uses to residential uses. The site is currently used as a bowling alley. Figure 5-6 provides a map showing the location of the site within the Mount Forest Northwest Employment Area.

The area is a mature industrial area and includes some large industrial uses that have a lower compatibility with residential uses, including a waste management depot site and the Township's Public Works Yard/Facility. The area also includes a fire station which generates additional noise and truck traffic to the area.

Figure 5-6
County of Wellington
Mount Forest Urban Centre – Northwest Employment Lands
Employment Area Land Conversion Requests





5.5.4.1 *Employment Area Conversion Site Assessment*

1) There is a need for the conversion.

As previously discussed, there is a need to accommodate additional Community Area lands in Mount Forest (56 ha); however, that need can be accommodated through redesignation of a portion of the Future Development lands. Mount Forest has a surplus of Employment Area lands of approximately 42 ha.

As discussed in Chapter 2, approximately 27 ha of Future Development lands and approximately 42 ha of Employment Area lands in Mount Forest will need to be identified as Excess Lands.

2) The lands are not required over the horizon of the Plan (2051) for employment purposes for which they are designated.

The Township has a surplus of 42 gross ha of Employment Area land.

3) The municipality will maintain sufficient employment lands to accommodate forecasted growth to the horizon of the Growth Plan.

The site has a small land area (less than 1 ha) and does not have a significant impact on the supply of available land.

4) The proposed use would not adversely affect the overall viability of the Employment Area.

The conversion of the site would risk the erosion of the Employment Area as the site is surrounded by industrial uses.

5) The achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Growth Plan.

The proposed use is in the B.U.A. and would contribute towards intensification opportunities.

6) There are existing or planned infrastructure and public service facilities to accommodate the proposed use(s).

The site is in proximity to Community Area amenities.



7) The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.

The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers, and minimum separation standards within both the rural and urban settings.

The conversion of the subject site would introduce residential uses in an area that has industrial uses which would not be buffered from the residential uses. As discussed, the industrial area has a waste management depot site, fire station and the Township's Public Works Yard/Facility which have a lower degree of compatibility.

8) The site should not be adjacent to or in proximity to major transportation corridors (e.g., highways, goods movement network, cross jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).

The site is within a mature Employment Area but is not located on a major transportation corridor.

9) The site should be located outside or on the fringe of an assembly of Employment Areas.

The subject site is in the centre of the Employment Area.

10) The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints etc.

Provided below is a summary of the site characteristics:

- The subject site is a parcel less than 1 ha in size and is considered a small parcel.
- While the site's opportunity as an Employment Area is more limited due to size, it is situated in the centre of the Employment Area and has the risk of eroding the function of the Employment Area.



- 11) Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.**

The site is located in a mature Employment Area.

- 12) The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.**

The subject site represents a small parcel; however, it risks impacting the viability of the vacant Employment Area uses in Mount Forest.

- 13) The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.**

The subject site is not located on a brownfield site.

- 14) The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.**

Maintaining the site as an Employment Area site would ensure the viability of the Employment Area and its large employment uses.

- 15) The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.**

The subject site is not located near a neighbouring municipal or County jurisdiction.



- 16) The conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.**

Not applicable.

- 17) The conversion request demonstrates total job yield of the site can be maintained or improved.**

The development concept is proposed as a residential use and would not generate jobs.

5.5.4.2 Employment Area Conversion Site Recommendation

It is recommended that the County maintain this site as Employment Area lands. The proposed conversion would introduce residential uses and would lead to potential compatibility issues with the surrounding industrial base.

5.5.5 Site 5 – E. of Highway 6 and North of Sligo Road – Mount Forest Northeast Employment Area

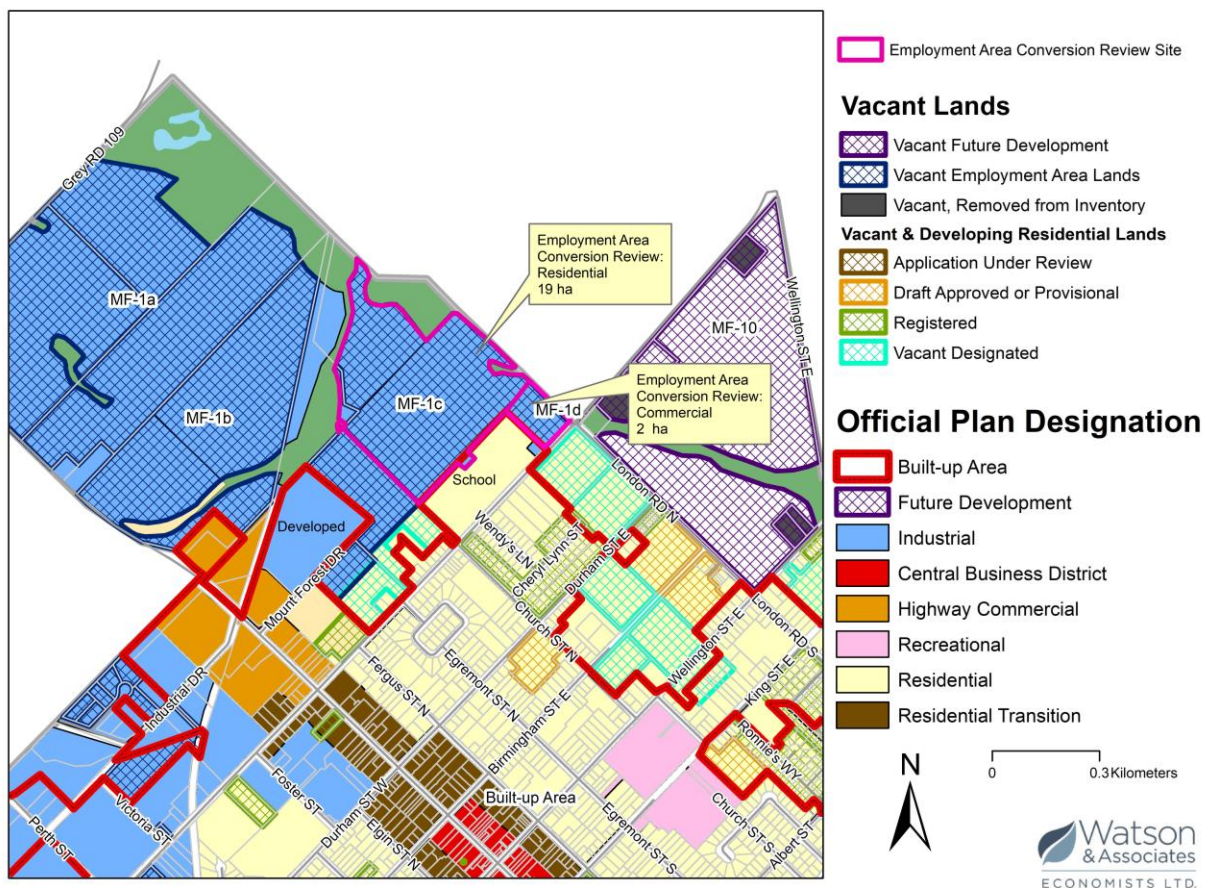
This site area of approximately 21 ha is a part of the Northeast Employment Area in the Mount Forest Urban Centre. The site includes a large vacant parcel. This site has been identified in the Township of Wellington North Growth Plan as a potential conversion to residential and commercial uses. Based on the request by Township Council and staff, as well as the landowner, this site has been included in the conversion review. It should be noted that the site area identified in the Township of Wellington North Plan is larger and includes approximately 27 ha of vacant and developed Employment Area lands. Based on discussions with Township staff, the conversion review area has been refined to include the vacant Employment Area lands east of the Church Street extension (Irwin Lytle Drive), while the landowner has further requested the lands forming the northern extent of the site be included (area surrounded by environmental features).

Figure 5-7 provides a map showing the location of the site within the Mount Forest Northeast Employment Area. It should be noted that a secondary school, Wellington Heights High School, which opened in 2004, is located at 405 Sligo Road East, adjacent to a portion of the vacant lands. A secondary school is considered a sensitive use



(large institutional use) and requires adequate buffering from Employment Area uses. The size of the parcel provides the opportunity to ensure adequate buffering with the secondary school. Furthermore, the site has access to London Road, to the east, and Mount Forest Road, to the west, which will ensure that trucking traffic is directed away from the secondary school and the residential area. West of the site, on Mount Forest Drive, is a large active industrial use: Vintex, a large manufacturing operation.

Figure 5-7
County of Wellington
Mount Forest Urban Centre – Northeast Employment Lands
Employment Area Land Conversion Requests





5.5.5.1 *Employment Area Conversion Site Assessment*

1) There is a need for the conversion.

As previously discussed, there is a need to accommodate additional Community Area lands in Mount Forest (56 ha); however, that need can be accommodated through redesignation of a portion of the Future Development lands. Mount Forest has a surplus of approximately 42 ha of Employment Area lands.

As discussed in Chapter 2, approximately 27 ha of Future Development lands and approximately 42 ha of Employment Area lands in Mount Forest will need to be identified as Excess Lands.

2) The lands are not required over the horizon of the Plan (2051) for employment purposes for which they are designated.

The Township has a surplus of 42 gross ha of Employment Area lands.

3) The municipality will maintain sufficient employment lands to accommodate forecasted growth to the horizon of the Growth Plan.

The site is a large tract of Employment Area and represents a large portion of the vacant land supply in Mount Forest.

4) The proposed use would not adversely affect the overall viability of the Employment Area.

The conversion of the site would risk the viability of remaining Employment Area vacant lands outside the conversion site area.

5) The achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Growth Plan.

The proposed use is in the D.G.A. and would impact the L.N.A.

6) There are existing or planned infrastructure and public service facilities to accommodate the proposed use(s).

The site is in proximity to Community Area amenities, including commercial uses and a secondary school.



7) The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.

The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers, and minimum separation standards within both the rural and urban setting.

The conversion of the subject site would introduce residential uses in an area that represents a large supply of the Township's Employment Area lands.

The vacant lands to the north are well buffered from Community Area uses. Furthermore, there is already an industrial presence in the Employment Area and within the broader area on the West Grey side of Highway 6.

It should be noted that a secondary school, Wellington Heights High School, which opened in 2004, is located at 405 Sligo Road East, adjacent to a portion of the vacant lands. A secondary school is considered a sensitive use (large institutional use) and requires adequate buffering from Employment Area uses. The size of the parcel provides the opportunity to ensure adequate buffering with the secondary school and transition from Employment Area uses. Furthermore, the site has access to London Road, to the east, and Mount Forest Road, to the west, which will ensure that trucking traffic is directed away from the secondary school and residential area.

8) The site should not be adjacent to or in proximity to major transportation corridors (e.g., highways, goods movement network, cross jurisdictional connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).

The site is in proximity to the Highway 6 corridor and situated in the northern edge of Mount Forest, allowing for the efficient movement of goods.

9) The site should be located outside or on the fringe of an assembly of Employment Areas.

The site is within an Employment Area.



10) The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints, etc.

Provided below is a summary of the site characteristics:

- The site is a large parcel and has a wide range of opportunities for Employment Area uses.
- The site has access to Highway 6, allowing for the efficient movement of goods.

11) Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.

The site is located in an established Employment Area.

12) The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.

The site area represents a large portion of the Township's employment land supply.

13) The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.

The subject site is not located on a brownfield site.

14) The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.

Maintaining the site as an Employment Area site would ensure the viability of the Employment Area and its large employment uses.



15) The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.

The proposed conversion is not anticipated to have an impact on the neighbouring municipal or County jurisdiction.

16) The conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.

Approximately 2 ha (recommended portion) of the Employment Area conversion to Community Area is identified as Highway Commercial in the Township of Wellington North Community Growth Plan. While this portion is recommended for conversion, Community Area uses should include mixed or residential uses. Converting the site to commercial use would establish a new commercial area outside the existing commercial structure of Mount Forest.

17) The conversion request demonstrates total job yield of the site can be maintained or improved.

The proposed conversion includes a small portion of the site identified for Highway Commercial use which may provide employment opportunities.

5.5.5.2 Employment Area Conversion Site Recommendation

It is recommended that the County maintain the large portion of the site area north of the secondary school as Employment Area lands (previously identified as MF-1c in Figure 5-7) of approximately 19 ha. The proposed conversion would introduce residential uses and would impact the viability of the County's remaining vacant Employment Area lands in the Mount Forest Northeast Employment Area. The County's Employment Area lands in the Mount Forest Northeast Employment Area offer an opportunity to attract a wide range of Employment Area uses that have access to Highway 6 and are removed from residential uses. It is important to note that the lands along Highway 6 in West Grey already have an industrial presence.

It is recommended the County consider converting a small portion of the site east of the secondary school (previously identified as MF-1c in Figure 5-7) of approximately 2 ha for commercial or mixed uses. Given the proximity to the secondary school, this portion



of the site provides limited opportunity for buffering. The recommendation to remove this portion of the site area would provide a more defined Employment Area edge.

5.5.6 Site 6 – 510 Eliza Street, Arthur Employment Area

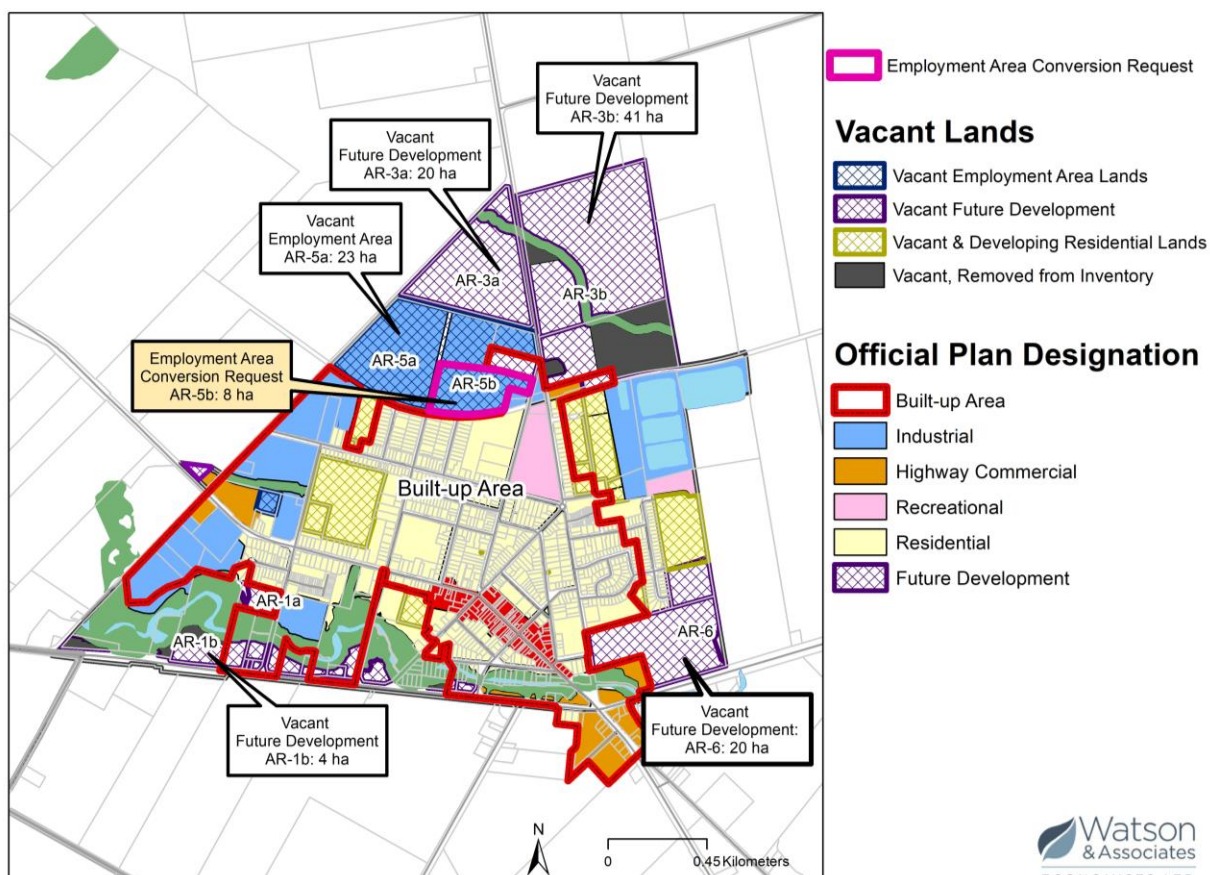
The site area is approximately 8 ha.^[1] The applicant is seeking the conversion of this site from Employment Area uses to residential uses. Figure 5-8 provides a map showing the location of the site within the Arthur Employment Area.

South of the subject site is the former CN railway line which also forms the northern boundary of the B.U.A. for the Arthur Urban Centre. The local road network in Arthur is primarily undeveloped north of the CN railway line. Wells Road, Tucker Street and Eliza Street, which extends to County Road 14, provide access to the site area. Musashi Auto Parts, one of the County's largest employers, is located to the southwest of the subject site on the developed portion of the Employment Area. To the north, adjacent to the subject site, there are large tracts of vacant Employment Area and designated Future Development lands. Primarily rural lands are to the east of the subject site, including one residential lot, two auto service shops (i.e., Jim's Auto Service and Cotton Auto Service), a farm and a Township of Wellington North Public Works garage. To the immediate south of the subject site, there is a residential neighbourhood and a secondary school.

^[1] Based on revised Employment Area conversion request and development concept plan discussed in letter from GSP Group to the County of Wellington, dated May 3, 2022.



Figure 5-8
County of Wellington
Arthur Urban Centre – Arthur Industrial Lands
Employment Area Land Conversion Request



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5.5.6.1 Employment Area Conversion Site Assessment

1) There is a need for the conversion.

As discussed in Chapter 2, there is a need to accommodate additional Community Area lands in Arthur (26 ha); however, that need can be accommodated through redesignation of Future Development lands. The Future Development lands in southeast Arthur are situated in an area that has been identified as the next stage of development in Arthur for servicing in the Township of Wellington North Growth Plan. Furthermore, these lands form a



logical extension to the residential lands in the Arthur Urban Centre, as they are adjacent to developing residential lands.

2) The lands are not required over the horizon of the Plan (2051) for employment purposes for which they are designated.

Based on the findings of the Employment Area analysis, it is recommended that approximately 42 gross ha of vacant Employment Area lands in Mount Forest are identified as Excess Lands, while the 32 ha of vacant Employment Area lands in Arthur remain available for Employment Area opportunities. The supply of vacant Employment Area lands in Arthur contributes towards supporting a range of location and site options for prospective and existing businesses in the Township.

3) The municipality will maintain sufficient employment lands to accommodate forecasted growth to the horizon of the Growth Plan.

The subject site represents nearly a third of the vacant Employment Area lands available in Arthur; it is located adjacent to the remaining vacant Employment Area lands in Arthur. The conversion of the subject site to a non-employment use would impede the development potential of the Township's Employment Areas in several ways. First, it would direct sensitive and potentially incompatible residential land uses adjacent to the remaining Employment Area. Second, it would create further pressure to convert the remaining vacant Employment Area to a non-employment use, as it would be suggested that the broader Employment Area is now transitioning to Community Area. Lastly, and more broadly, the conversion of the subject site would set a precedent for further Employment Area conversions in the future throughout the Township and Wellington County.

4) The proposed use would not adversely affect the overall viability of the Employment Area.

The conversion of the subject site would not have an impact on existing Employment Area uses at the current time, as the site is not surrounded by developed Employment Area lands. As discussed, however, the conversion of the site to non-employment uses would impact the viability of the remaining



vacant Employment Area lands in Arthur. The conversion would risk the opportunity for Arthur to attract Employment Area uses over the next 30 years.

5) The achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Growth Plan.

The proposed development concept would not undermine density and intensification targets.

6) There are existing or planned infrastructure and public service facilities to accommodate the proposed use(s).

The development would introduce residential lands northward in Arthur and potentially “leapfrog” over future development sites, which have currently been identified by the Township as the next logical phase for residential/mixed-use development. The subject site is located north of the former CN railway line and the local road network is primarily undeveloped in that area. As discussed, utilizing Future Development lands in the southeast of Arthur would contribute towards completing residential neighbourhoods.

It is recognized that there is a secondary school and arena in proximity to the subject site.

7) The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.

The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers, and minimum separation standards within both the rural and urban setting.

The development of residential uses on the subject site would limit Employment Area opportunities on the adjacent Employment Area lands located directly to the north and potentially to the west. SNC Lavalin prepared an Air and Noise Review (dated January 22, 2022) for the County of Wellington of the North Arthur



Development ^[1] based on the previous development concept that included a larger land area of approximately 14 ha. The SNC memo noted the following:

- The future viability of the industrial zoned lands will be significantly reduced due to the proximity of the subject site development.
- The compatibility of the development with future industrial uses in the area will be limited to minor or small facilities due to the proximity of the development and the potential for air and noise compatibility issues.
- Compatibility can be achieved if limitations and mitigations are utilized; however, the range of development opportunities will be greatly reduced, and mitigation costs and responsibility would likely be held by future industries.^[2]

Since the SNC Air and Noise Review, a revised development concept has been prepared which includes less Employment Area land considered for conversion from Employment Area to residential (8 ha instead of 14 ha). Based on the revised development concept and the concerns noted in the SNC memo, BCX Environmental Consulting prepared an addendum to the Land Use Compatibility Study – Air Quality: North Arthur Development Inc. that was prepared for the applicant. The BCX Environmental Consulting report notes that only a portion of Employment Area lands to the north and a small portion of lands to the west would be impacted by the conversion of lands to residential on the proposed conversion site. This lands would limited to Class 1 industrial uses. ^[3]

8) The site should not be adjacent to or in proximity to major transportation corridors (e.g., highways, goods movement network, cross jurisdictional

^[1] County of Wellington - Third Party Air and Noise Review of North Arthur Development located at 510 Eliza Street, Arthur, Ontario, prepared by SNC Lavalin, January 22, 2022.

^[2] Ibid.

^[3] Based on BCX Environmental Consulting, Addendum to Land Use Compatibility Study – Air Quality – Proposed Residential Development in Arthur, Ontario, dated May 2, 2022.



connections) and goods movement infrastructure (e.g., airports, intermodal yards, and rail).

Based on the revised development concept, the development area would be accessed from Tucker Street to the east and a future residential street to the north. The revised concept would not direct residential traffic to the Employment Area.

9) The site should be located outside or on the fringe of an assembly of Employment Areas.

The subject site is located within an Employment Area and forms a large portion of the Employment Area.

10) The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints etc.

Provided below is a summary of the site characteristics:

- The subject site is a parcel approximately 8 ha in size and is considered a large parcel.
- The subject site has access to and frontage on Eliza Street, a major road within Arthur.
- The site is generally flat with limited environmental features and the opportunity for a range of severance options.
- The former CN railway line south of the site acts as a buffer separating the residential uses to the south and potential industrial uses on the subject site.

11) Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.

The subject site forms a large tract of vacant Employment Area lands. The Employment Area has not yet established a presence in the area. Development in general has historically been limited in Arthur due to municipal servicing constraints (e.g., water/wastewater servicing).



12) The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.

Given the location of the subject property, the conversion of this site to a non-employment use would negatively impact the viability of the entire vacant and developed Employment Area in Arthur. As noted in the County of Wellington O.P., "all Urban Centres are expected to contribute to the supply of serviced industrial land by designating and zoning industrial areas well in advance of development."^[1]

13) The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.

The subject site is not located on a brownfield site.

14) The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.

The subject site has been identified as Stage 3 for development in Arthur in the Township's Growth Plan. The Township has prioritized other sites for housing growth, in particular the lands in the south.

While the development proposal for the subject site provides additional housing options to Arthur, it is our understanding that currently there are potential servicing (e.g., water/wastewater) limitations for this area. From a planning perspective, Future Development lands in the southeast of Arthur, identified as Stage 2 for development in the Township's Growth Plan, would be a more logical extension of existing residential uses.

^[1] County of Wellington Official Plan, policy 7.5.10, p. 95.



15) The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.

The subject site is not located near a neighbouring municipal or County jurisdiction.

16) The conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.

The revised development concept (Phase 1) does not include non-residential uses.

17) The conversion request demonstrates total job yield of the site can be maintained or improved.

The proposed conversion would not generate a significant number of jobs.

5.5.6.2 Employment Area Conversion Site Recommendation

It is recommended that the County maintain this site as Employment Area lands. The proposed Employment Area conversion would introduce land use incompatibility issues to the adjacent designated Employment Area lands which would limit the viability of the remaining Employment Area from developing. In conclusion, the conversion of the subject site to a non-employment use would potentially undermine efforts in attracting industrial-type development opportunities to Arthur over the next 30 years.



5.6 Recommendations

Figures 5-9 and 5-10 provide a summary of the conversion recommendations, as well as potential impact on the land needs for the Township of Centre Wellington and the Township of Wellington North. As summarized in Figure 5-9, it is recommended that the County consider several sites within Employment Areas for conversion to non-employment uses within the Township of Centre Wellington. This would require adding 14 ha of land to the S.A.B.E. requirements for Employment Areas and reducing the County's Community Area S.A.B.E. requirements by 9 ha.

As summarized in Figure 5-10, it is recommended that the County maintain Site 4 and Site 6 as Employment Area. It is recommended that the County maintain most of Site 5 as Employment Area (19 ha) and convert approximately 2 ha for Community Area uses.



Figure 5-9
County of Wellington
Township of Centre Wellington
Summary of Recommendations

Site	Employment Area	Land Area, ha	Conversion Request	Recommendation	Impact on Land Needs, ha
Site 1: 22 Park Road (B.U.A.)	Elora South Employment Lands	1.3 ha (1 parcel)	Highway Commercial	Conversion to Highway Commercial	Employment Area S.A.B.E.: Add: 0.7 ha Community Area: Intensification Potential
Site 2: 6408, 6410, 6420 and 6430 Beatty Line (D.G.A.)	Beatty Line and Hill Employment Area	8.8 ha (4 parcels)	Highway Commercial and Mixed Use	Conversion to Highway Commercial or Mixed-Use	Employment Area S.A.B.E.: Add: 9 ha Community Area S.A.B.E.: Reduce: 9 ha
Site 3: East of Beatty Line and South of Garafraxa Street (B.U.A.)	Beatty Line and Hill Employment Area	24 ha (18 parcels)	Mixed Use	Consideration of a Special Policy to Support Transition of the Area	Employment Area S.A.B.E.: Add: 4 ha Community Area: Intensification Potential
Centre Wellington	-	34 ha	-	-	Addition of 14 ha to Employment Area S.A.B.E. Reduction of 9 ha to Community Area S.A.B.E.

Source: Watson & Associates Economists Ltd.



Figure 5-10
County of Wellington
Township of Wellington North
Summary of Recommendations

Site	Employment Area	Land Area, ha	Conversion Request	Recommendation
Site 4: 350 Foster Street (B.U.A.)	Mount Forest Northwest Employment Lands	0.4 ha (1 parcel)	Residential	Maintain as Employment Area lands
Site 5: East of Highway 6 and North of Sligo Road (D.G.A.)	Mount Forest Northeast Employment Lands	21 ha (1 parcel and 2 portions)	Residential	Maintain 19 ha as Employment Area lands and convert 2 ha of Employment Area lands with frontage on Sligo Road (east of Secondary School)
Site 6: 510 Eliza Street (D.G.A.)	Arthur Industrial Lands	8 ha	Residential	Maintain as Employment Area lands
Wellington North Total	-	29 ha	-	Reduces Employment Area Excess Lands by 2 ha Reduces redesignation of Future Development lands by 2 ha

Source: Watson & Associates Economists Ltd.



Chapter 6

Conclusions



6. Conclusions

The following conclusions are provided with respect to the residential and non-residential growth trends and corresponding urban land needs by Area Municipality in Wellington County to the year 2051.

Residential Intensification Target

It is anticipated that most of the County's Urban Centres will play an increasing role in accommodating a broadening range of future housing options by structure type, density and tenure (ownership and rental), as discussed in the County of Wellington Phase 1 M.C.R. Report. Notwithstanding this potential for increased housing options within the County's urban areas, the results of this M.C.R. identify that the County's current housing intensification target is not considered to be realistic based on historical development trends, anticipated demand and available housing supply opportunities within the B.U.A. across the County. During the 2022 to 2051 planning horizon, a 15% County-wide residential intensification target is recommended as an alternative intensification target for Wellington County.

Community Area and Employment Area Land Needs

Based on the comprehensive analysis carried out herein, it has been determined that the County has an overall shortfall of designated Community Area land totalling approximately 501 gross ha to 2051. To accommodate this identified shortfall, the County will need to redesignate approximately 195 ha of Future Development lands to Community Area uses and expand Urban Settlement Area boundaries by an additional 290 ha (adjusted to reflect recommended conversions as discussed in Chapter 5). Recognizing differences in local urban land supply and demand across the County, it is recommended that approximately 87 ha of Future Development lands in Wellington North are identified as Excess Lands.

Accommodating commercial lands is a component of the Community Area land need consideration. Based on the commercial analysis, most of the Community Area land needs identified are determined to accommodate primarily residential uses. Within the County, it is forecast that Hillsburgh has the largest need for additional commercial land (7 ha), while Drayton, Palmerston and Arthur require 2 to 3 ha. These commercial land requirements could be accommodated through the redesignation of Future



Development lands. New designated commercial lands should be added in strategic areas that strengthen and complement the existing commercial structure. While Fergus has a small surplus of commercial land (5 ha), any changes to the South Fergus Secondary Plan with respect to commercial land may have an impact on commercial needs.

Employment Areas will continue to be an important component of the County's economic base, as discussed in the County of Wellington Phase 1 M.C.R. Report. Based on the comprehensive analysis carried out herein, it has been determined that the County has an overall shortfall of approximately 192 gross ha of designated Employment Areas to accommodate employment growth to 2051 (adjusted to reflect recommended conversions). Accordingly, the County will need to expand its Urban Settlement Area boundaries to accommodate additional Employment Area lands in Centre Wellington, Mapleton and Erin. Recognizing differences in local urban land supply and demand across the County, it is recommended that all, or a significant portion, of the 42-ha surplus of Employment Area lands in Wellington North be identified as Excess Lands. The Town of Minto has a surplus of 14 ha of Employment Area lands.

Rural Employment Area Land Needs

It is important to recognize that the Growth Plan, 2019 approaches S.A.B.E.s differently for the Urban and Rural Areas. An assessment of the Rural Employment Area has been provided to the County and its Area Municipalities for planning purposes. It has been identified that the Township of Puslinch has a shortfall of approximately 30 ha of Rural Employment Area lands to accommodate employment growth to 2051.

Employment Area Conversion Review

This report reviewed six Employment Area land conversions comprehensively and three site areas within the Township of Wellington Centre were recommended for conversions and have the following impact on land needs:

- An additional 14 ha of Employment lands are required for S.A.B.E. Accordingly, Centre Wellington land requirements for Employment Area lands increase from 146 ha to 160 ha.
- Community Area S.A.B.E. requirements for Centre Wellington are reduced by 9 ha from 247 ha to 238 ha.



- Two of the recommended Employment Area conversion sites are in the B.U.A. and increase the commercial/mixed and housing intensification potential for Centre Wellington. These lands are approximately 25 ha in land area. The largest site area is 24 ha and is situated in the Beatty Line and Hill Employment Area. It is recommended that this site is identified as a special policy area to recognize the transitioning nature of this site from an Employment Area to a mixed-use area. The site currently includes one large industrial use in a heritage building and primarily commercial uses that are permitted under the Industrial designation.

Three sites in the Township of Wellington North were comprehensively reviewed. It is recommended that most of these lands remain as Employment Area. A small portion of an Employment Area site, east of Highway 6 and North of Sligo Road in Mount Forest, totalling 2 ha, is recommended for conversion to Community Area due to its location next to a sensitive use (secondary school) and the lack of area to accommodate an adequate buffer. This adjustment to the Employment Area in Mount Forest would provide a more defined Employment Area edge.

Figure 6-1 provides a summary of the Community Area and Employment Area lands needs by Area Municipality.



Figure 6-1
County of Wellington
Summary of Land Needs, Adjusted for Recommended Employment Area Conversions

Area Municipality	Redesignation of Future Development Lands to Community Area	Community Area S.A.B.E., ha	Community Area Excess, ha	Urban Employment Area S.A.B.E., ha	Rural Employment Area Needs, ha	Urban Employment Area Excess, ha
Centre Wellington	-	238	-	160	-	-
Mapleton	15	34	-	9	-	-
Minto	61	18	-	-	-	-
Wellington North	81	-	89	-	-	40
Puslinch	-	-	-	-	30	-
Guelph-Eramosa	-	-	-	-	-	-
Erin	38	-	-	23	-	-
County of Wellington	195	290	89	192	30	40

Note: Adjusted for recommended Employment Area to Community Area conversions in the Township of Wellington North (2 ha) and the Township of Centre Wellington (14 ha). Conversion of sites in the Township of Centre Wellington includes 5 ha in the B.U.A. and 9 ha in D.G.A. Lands in the B.U.A. provide intensification opportunities and do not reduce Community Area land needs.

Source: Watson & Associates Economists Ltd.

The County of Wellington Phase 3 M.C.R. Report will explore the following:

Community Area

- Future Development lands of approximately 195 ha to be redesignated to Community Area land (e.g., residential, mixed-used, commercial, etc.);
- Location options for 290 ha of S.A.B.E. (adjusted based on conversion recommendations) based on the results of this Phase 2 study;
- Location options for 89 ha of identified Excess Lands in Wellington North (lands that are currently designated as Future Development) and the development of a policy approach to manage these lands in the County O.P. (i.e., Excess Lands policy overlay); and
- Additional policy considerations.



Employment Area

- Location options for 192 ha of an S.A.B.E. (upwardly adjusted based on recommended Employment Area conversions) based on the results of this Phase 2 study;
- Location options for 42 ha of identified Excess Lands in Wellington North (lands that are currently designated as Industrial);
- The development of a policy approach to manage Excess Lands in the County O.P. (i.e., Excess Lands policy overlay); and
- Additional policy considerations.

As part of the Phase 3 M.C.R. Report or separate study, the County will explore the following:

Rural Area

- Addressing Rural Employment Area land needs of approximately 30 ha within the Township of Puslinch; and
Review rural residential development potential in secondary urban centres (Aberfoyle and Morriston), hamlets and through severances in the secondary agricultural area.



Appendix A

Housing Forecast by Policy Area and Intensification Rates



Appendix A: Housing Forecast by Policy Area and Intensification Rates

Figure A-1
Housing Forecast by Policy Area and Intensification Rates, 2022 to 2051

Table 1: Township of Centre Wellington

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	130	290	1,350	1,770
Designated Greenfield Area	4,920	1,760	280	6,960
Rural	230	0	0	230
Total	5,280	2,050	1,630	8,960
Built-up Area	2%	14%	83%	20%
Designated Greenfield Area	93%	86%	17%	78%
Rural	4%	0%	0%	3%
Total	100%	100%	100%	100%
Annual Housing Growth				
Built-up Area	4	10	47	61
Designated Greenfield Area	170	61	10	240
Rural	8	0	0	8
Total	182	71	56	309

Table 2: Town of Erin

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	90	90	180	360
Designated Greenfield Area	2,770	600	560	3,930
Rural	610	0	0	610
Total	3,470	690	740	4,900
Built-up Area	3%	13%	24%	7%
Designated Greenfield Area	80%	87%	76%	80%
Rural	18%	0%	0%	12%
Total	100%	100%	100%	100%
Annual Housing Growth				
Built-up Area	3	3	6	12
Designated Greenfield Area	96	21	19	136
Rural	21	0	0	21
Total	120	24	26	169

Note: Figures have been rounded. May not add up precisely when compared to other figures.
Source: Watson & Associates Economists Ltd.



Figure A-1 (Cont'd)
Housing Forecast by Policy Area and Intensification Rates, 2022 to 2051

Table 3: Township of Guelph-Eramosa

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	40	0	0	40
Designated Greenfield Area	160	30	60	250
Rural	120	0	0	120
Total	320	30	60	410
Built-up Area	13%	0%	0%	10%
Designated Greenfield Area	50%	100%	100%	61%
Rural	38%	0%	0%	29%
Total	100%	100%	100%	100%
Annual Housing Growth				
Built-up Area	1	0	0	1
Designated Greenfield Area	6	1	2	9
Rural	4	0	0	4
Total	11	1	2	14

Table 4: Township of Mapleton

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	60	20	110	190
Designated Greenfield Area	870	270	90	1,230
Rural	110	0	0	110
Total	1,040	290	200	1,530
Built-up Area	6%	7%	55%	12%
Designated Greenfield Area	84%	93%	45%	80%
Rural	11%	0%	0%	7%
Total	100%	100%	100%	100%
Annual Housing Growth				
Built-up Area	2	1	4	7
Designated Greenfield Area	30	9	3	42
Rural	4	0	0	4
Total	36	10	7	53

Note: Figures have been rounded. May not add up precisely when compared to other figures.

Source: Watson & Associates Economists Ltd.



Figure A-1 (Cont'd)
Housing Forecast by Policy Area and Intensification Rates, 2022 to 2051

Table 5: Township of Wellington North

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	220	50	270	540
Designated Greenfield Area	1,520	400	70	1,990
Rural	220	0	0	220
Total	1,960	450	340	2,750
Built-up Area	11%	11%	79%	20%
Designated Greenfield Area	78%	89%	21%	72%
Rural	11%	0%	0%	8%
Total	100%	100%	100%	100%
Annual Housing Growth				
Built-up Area	8	2	9	19
Designated Greenfield Area	52	14	2	69
Rural	8	0	0	8
Total	68	16	12	95

Table 6: Town of Minto

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	160	60	90	310
Designated Greenfield Area	1,190	300	100	1,590
Rural	110	0	0	110
Total	1,460	360	190	2,010
Built-up Area	11%	17%	47%	15%
Designated Greenfield Area	82%	83%	53%	79%
Rural	8%	0%	0%	5%
Total	100%	100%	100%	100%
Annual Housing Growth				
Built-up Area	6	2	3	11
Designated Greenfield Area	41	10	3	55
Rural	4	0	0	4
Total	50	12	7	69

Note: Figures have been rounded. May not add up precisely when compared to other figures.

Source: Watson & Associates Economists Ltd.



Figure A-1 (Cont'd)
Housing Forecast by Policy Area and Intensification Rates, 2022 to 2051

Table 7: Township of Puslinch

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	0	0	0	0
Designated Greenfield Area	0	0	0	0
Rural	650	0	0	650
Total	650	0	0	650
Built-up Area	0%	0%	0%	0%
Designated Greenfield Area	0%	0%	0%	0%
Rural	100%	0%	0%	100%
Total	100%	0%	0%	100%
Annual Housing Growth				
Built-up Area	0	0	0	0
Designated Greenfield Area	0	0	0	0
Rural	22	0	0	22
Total	22	0	0	22

Table 8: County of Wellington

Policy Area	Low Density	Medium Density	High Density	Total Units
Built-up Area	700	510	2,000	3,210
Designated Greenfield Area	11,430	3,360	1,160	15,950
Rural	2,050	0	0	2,050
Total	14,180	3,870	3,160	21,210
Built-up Area	5%	13%	63%	15%
Designated Greenfield Area	81%	87%	37%	75.2%
Rural	14%	0%	0%	9.7%
Total	100%	100%	100%	100%
Annual Housing Growth				
Built-up Area	24	18	69	111
Designated Greenfield Area	394	116	40	550
Rural	71	0	0	71
Total	489	133	109	731

Note: Figures have been rounded. May not add up precisely when compared to other figures.
Source: Watson & Associates Economists Ltd.



Figure A-2
Housing Forecast by Urban Centre and Intensification Rates, 2022 to 2051

Table 1: Township of Centre Wellington

Centre Wellington	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Elora	270	1,990	0	2,260	12%	3%
Fergus	1,500	4,970	0	6,470	23%	17%
Urban Centre	1,770	6,960	0	8,730	20%	20%
Rural	0	0	230	230	0%	0%
Total Centre Wellington	1,770	6,960	230	8,960	20%	20%

Table 2: Town of Erin

Erin	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Erin Village	270	2,340	0	2,610	10%	6%
Hillsburgh	90	1,590	0	1,680	5%	2%
Urban Centre	360	3,930	0	4,290	8%	7%
Rural	0	0	610	610	0%	0%
Total Erin	360	3,930	610	4,900	7%	7%

Table 3: Township of Guelph-Eramosa

Guelph-Eramosa	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Rockwood	50	250	0	300	17%	12%
Urban Centre	50	250	0	300	17%	12%
Rural	0	0	130	130	0%	0%
Total Guelph-Eramosa	50	250	130	430	12%	12%

Table 4: Township of Mapleton

Mapleton	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Drayton	130	590	0	720	18%	8%
Moorefield	60	640	0	700	9%	4%
Urban Centre	190	1,230	0	1,420	13%	12%
Rural	0	0	110	110	0%	0%
Total Mapleton	190	1,230	110	1,530	12%	12%

Note: Figures have been rounded. May not add up precisely when compared to other figures.
Source: Watson & Associates Economists Ltd.



Figure A-2 (Cont'd)
Housing Forecast by Urban Centre and Intensification Rates, 2022 to 2051

Table 5: Township of Wellington North

Wellington North	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Arthur	250	530	0	780	32%	9%
Mount Forest	290	1,470	0	1,760	16%	11%
Urban Centre	540	2,000	0	2,540	21%	20%
Rural	0	0	220	220	0%	0%
Total Wellington North	540	2,000	220	2,760	20%	20%

Table 6: Town of Minto

Minto	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Palmerston	130	1,160	0	1,290	10%	6%
Harriston	110	330	0	440	25%	5%
Clifford	60	110	0	170	35%	3%
Urban Centre	300	1,600	0	1,900	16%	15%
Rural	0	0	110	110	0%	0%
Total Minto	300	1,600	110	2,010	15%	15%

Table 7: Township of Puslinch

Puslinch	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Urban Centre	0	0	0	0	0%	0%
Rural	0	0	650	650	0%	0%
Total Guelph-Eramosa	0	0	650	650	0%	0%

Table 8: County of Wellington

Wellington County	B.U.A.	D.G.A.	Rural	Total Units	B.U.A. as % of Urban Centre Growth	B.U.A. as % Municipality Growth
Urban Centre	3,210	15,970	0	19,180	17%	15%
Rural	0	0	2,060	2,060	0%	0%
Wellington County	3,210	15,970	2,060	21,240	15%	15%

Note: Figures have been rounded. May not add up precisely when compared to other figures.

Source: Watson & Associates Economists Ltd.



Figure A-3
Housing Supply Potential and Demand within the B.U.A. by Urban Centre
Township of Wellington North

Table 1: Arthur Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	130	50	90	270
Housing Supply Potential as of Mid-2019	130	50	70	250
Additional Residential Unit Potential			30	30
Total Housing Supply with Additional Residential Units	130	50	100	280
Additional Units Required: Surplus/(Shortfall)	0	0	10	10

Table 2: Mount Forest Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	100	60	170	330
Housing Supply Potential as of Mid-2019	70	60	130	260
Additional Residential Unit Potential			60	60
Total Housing Supply with Additional Residential Units	70	60	190	320
Additional Units Required: Surplus/(Shortfall)	-30	0	20	-10

Notes: Figures have been rounded. Shortfall in Mount Forest can be accommodated on approximately 2 ha of Future Development lands within the B.U.A.

Source: Watson & Associates Economists Ltd. Housing supply potential based on County of Wellington land supply inventory as of mid-2019 and includes potential on all vacant designated residential lands.



Figure A-3 (Cont'd)
Housing Supply Potential and Demand within the B.U.A. by Urban Centre
Town of Minto

Table 3: Harriston Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	60	50	20	130
Housing Supply Potential as of Mid-2019	60	50	0	110
Additional Residential Unit Potential			30	30
Total Housing Supply with Additional Residential Units	60	50	30	140
Additional Units Required: Surplus/(Shortfall)	0	0	10	10

Table 4: Palmerston Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	80	4	60	140
Housing Supply Potential as of Mid-2019	80	4	0	84
Additional Residential Unit Potential			60	60
Total Housing Supply with Additional Residential Units	80	4	60	140
Additional Units Required: Surplus/(Shortfall)	0	0	0	0

Table 5: Clifford Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	30	20	20	70
Housing Supply Potential as of Mid-2019	100	20	5	125
Additional Residential Unit Potential			15	15
Total Housing Supply with Additional Residential Units	100	20	20	140
Additional Units Required: Surplus/(Shortfall)	70	0	0	70

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd. Housing supply potential based on County of Wellington land supply inventory as of mid-2019 and includes potential on all vacant designated residential lands.



Figure A-3 (Cont'd)
Housing Supply Potential and Demand within the B.U.A. by Urban Centre
Township of Mapleton

Table 6: Drayton Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	5	4	90	100
Housing Supply Potential as of Mid-2019	5	4	0	10
Additional Residential Unit Potential			130	130
Total Housing Supply with Additional Residential Units	5	4	130	140
Additional Units Required: Surplus/(Shortfall)	0	0	40	40

Table 7: Moorefield Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	40	10	20	70
Housing Supply Potential as of Mid-2019	40	0	0	40
Additional Residential Unit Potential			20	20
Total Housing Supply with Additional Residential Units	40	0	20	60
Additional Units Required: Surplus/(Shortfall)	0	-10	0	-10

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd. Housing supply potential based on County of Wellington land supply inventory as of mid-2019 and includes potential on all vacant designated residential lands.



Figure A-3 (Cont'd)
Housing Supply Potential and Demand within the B.U.A. by Urban Centre
Township of Wellington North

Table 8: Fergus Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	70	280	1,250	1,600
Housing Supply Potential as of Mid-2019	70	0	0	70
Additional Residential Unit Potential			580	580
Total Housing Supply with Additional Residential Units	70	0	580	650
Additional Units Required: Surplus/(Shortfall)	0	-280	-670	-950

Table 9: Elora Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	120	40	250	410
Housing Supply Potential as of Mid-2019	120	40	130	290
Additional Residential Unit Potential			160	160
Total Housing Supply with Additional Residential Units	120	40	290	450
Additional Units Required: Surplus/(Shortfall)	0	0	40	40

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd. Housing supply potential based on County of Wellington land supply inventory as of mid-2019 and includes potential on all vacant designated residential lands.



Figure A-3 (Cont'd)
Housing Supply Potential and Demand within the B.U.A. by Urban Centre
Town of Erin

Table 10: Erin Village Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	40	80	160	280
Housing Supply Potential as of Mid-2019	160	120	20	300
Additional Residential Unit Potential			120	120
Total Housing Supply with Additional Residential Units	160	120	140	420
Additional Units Required: Surplus/(Shortfall)	120	40	-20	140

Table 11: Hillsburgh Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	60	10	30	100
Housing Supply Potential as of Mid-2019	70	20	10	100
Additional Residential Unit Potential			60	60
Total Housing Supply with Additional Residential Units	70	20	70	160
Additional Units Required: Surplus/(Shortfall)	10	10	40	60

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd. Housing supply potential based on County of Wellington land supply inventory as of mid-2019 and includes potential on all vacant designated residential lands.



Figure A-4
Housing Supply Potential and Demand within the B.U.A. by Urban Centre
Township of Guelph-Eramosa

Table 12: Rockwood Urban Centre

Built-up Area	Low	Medium	High	Total
2019-2051	40	0	3	43
Housing Supply Potential as of Mid-2019	40	0	3	43
Additional Residential Unit Potential			0	0
Total Housing Supply with Additional Residential Units	40	0	3	43
Additional Units Required: Surplus/(Shortfall)	0	0	0	0

Figure A-5
Housing Supply Potential and Demand within the B.U.A. by Urban Centre
County of Wellington

Built-up Area	Low	Medium	High	Total
2019-2051	780	610	2,160	3,550
Housing Supply Potential as of Mid-2019	950	370	370	1,690
Additional Residential Unit Potential			1,270	1,270
Total Housing Supply with Additional Residential Units	950	370	1,640	2,960
Additional Units Required: Surplus/(Shortfall)	170	-240	-520	-590

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd. Housing supply potential based on County of Wellington land supply inventory as of mid-2019 and includes potential on all vacant designated residential lands.



Figure A-6
County of Wellington
Annual Additional Residential Unit Forecast
by Urban Centre, 2022 to 2051

Urban Centre	Historical, 2016 to 2021	Annual Forecast, 2022 to 2051	Total A.R.U., 2022 to 2051	Total A.R.U. in B.U.A., 2022 to 2051
Fergus (Centre Wellington)	18	22	640	530
Elora (Centre Wellington)	5	6	180	150
Erin Village (Erin)	0	4	130	110
Hillsburgh (Erin)	0	2	60	50
Rockwood (Guelph-Eramosa)	3	1	40	0
Drayton (Mapleton)	4	5	140	120
Moorefield (Mapleton)	0	1	20	20
Palmerston (Minto)	1	2	60	50
Clifford (Minto)	1	1	20	10
Harriston (Minto)	0	1	40	30
Mount Forest (Wellington North)	1	2	60	50
Arthur (Wellington North)	2	1	40	30
Total Urban Centres	35	48	1,430	1,150

Source: Watson & Associates Economists Ltd. Historical based on data from the County of Wellington.



Figure A-7
County of Wellington
Population Forecast by Policy Area and Area Municipality, 2051

Area Municipality	D.G.A., Population 2051	B.U.A. Population, 2051	Rural Population, 2051	Total Population, 2051
Centre Wellington	26,800	23,600	7,800	58,200
Erin	11,200	5,600	9,400	26,200
Wellington North	6,300	9,000	5,100	20,400
Minto	5,000	6,800	3,500	15,300
Mapleton	4,000	2,800	8,300	15,100
Guelph-Eramosa	1,900	3,900	8,900	14,700
Puslinch	0	0	10,000	10,000
Wellington County	55,000	52,000	53,000	160,000

Source: Watson & Associates Economists Ltd. Figures have been rounded.

Figure A-8
County of Wellington
D.G.A. Population, Housing and Employment Forecast, 2051

Area Municipality	D.G.A., Population 2051	D.G.A. Units., 2051	P.P.U.	P.R.E. Jobs, 2051	P.R.E. Ratio
Centre Wellington	26,800	9,450	2.84	4,200	6.4
Erin	11,200	3,990	2.81	2,300	4.9
Wellington North	6,300	2,170	2.90	1,100	5.7
Minto	5,000	1,730	2.89	800	6.3
Mapleton	4,000	1,490	2.68	500	8.0
Guelph-Eramosa	1,900	660	2.88	200	9.5
D.G.A. County Total	55,200	19,490	2.83	9,100	6.1

Source: Watson & Associates Economists Ltd.



Appendix B

Tables and Maps of Housing Supply Potential



Appendix B: Tables and Maps of Housing Supply Potential

Figure B-1
County of Wellington
Potential Housing Supply in the B.U.A. by Urban Centre
All Vacant Designated Residential Lands as of Mid-2019

Urban Centre	Low Density Housing	Medium Density Housing	High Density Housing	Total Housing Units
Erin	159	115	22	296
Elora-Salem	116	36	133	285
Mount Forest	73	60	127	260
Arthur	125	52	66	243
Clifford	101	22	6	129
Harriston	58	47	0	105
Hillsburgh	70	19	10	99
Palmerston	83	4	0	87
Fergus	72	0	0	72
Rockwood	33	0	26	59
Moorefield	38	0	0	38
Drayton	5	4	0	9
Total Urban Centres	933	359	390	1,682
%	55%	21%	23%	100%

Source: Based on data obtained from the County of Wellington land inventory.



Figure B-2
County of Wellington
D.G.A. Summary of Draft Approved/Registered Unbuilt Housing Supply Potential by
Urban Centre, Mid-2019

Urban Centre	Low Density Housing Units	Medium Density Housing Units	High Density Housing Units	Total Housing Unit Supply Potential
Fergus	1,205	355	244	1,804
Elora-Salem	469	394	0	863
Mount Forest	367	176	12	555
Harriston	180	76	24	280
Drayton	130	104	34	268
Arthur	106	28	25	159
Palmerston	89	38	26	153
Hillsburgh	71	19	10	100
Rockwood	69	0	0	69
Clifford	25	8	0	33
Erin*	6	0	0	6
Total Units	2,717	1,198	375	4,290
Housing Mix (%)	63%	28%	9%	100%

Notes: *In January 2021, 1,525 housing units were approved for lands in northeast Erin at an LPAT hearing (Case: PL171265) which are not reflected in the housing supply.

Source: County of Wellington Residential Housing Supply Inventory, mid-2019.



Figure B-3
County of Wellington
Urban and Rural Housing Potential Supply Mapping Package

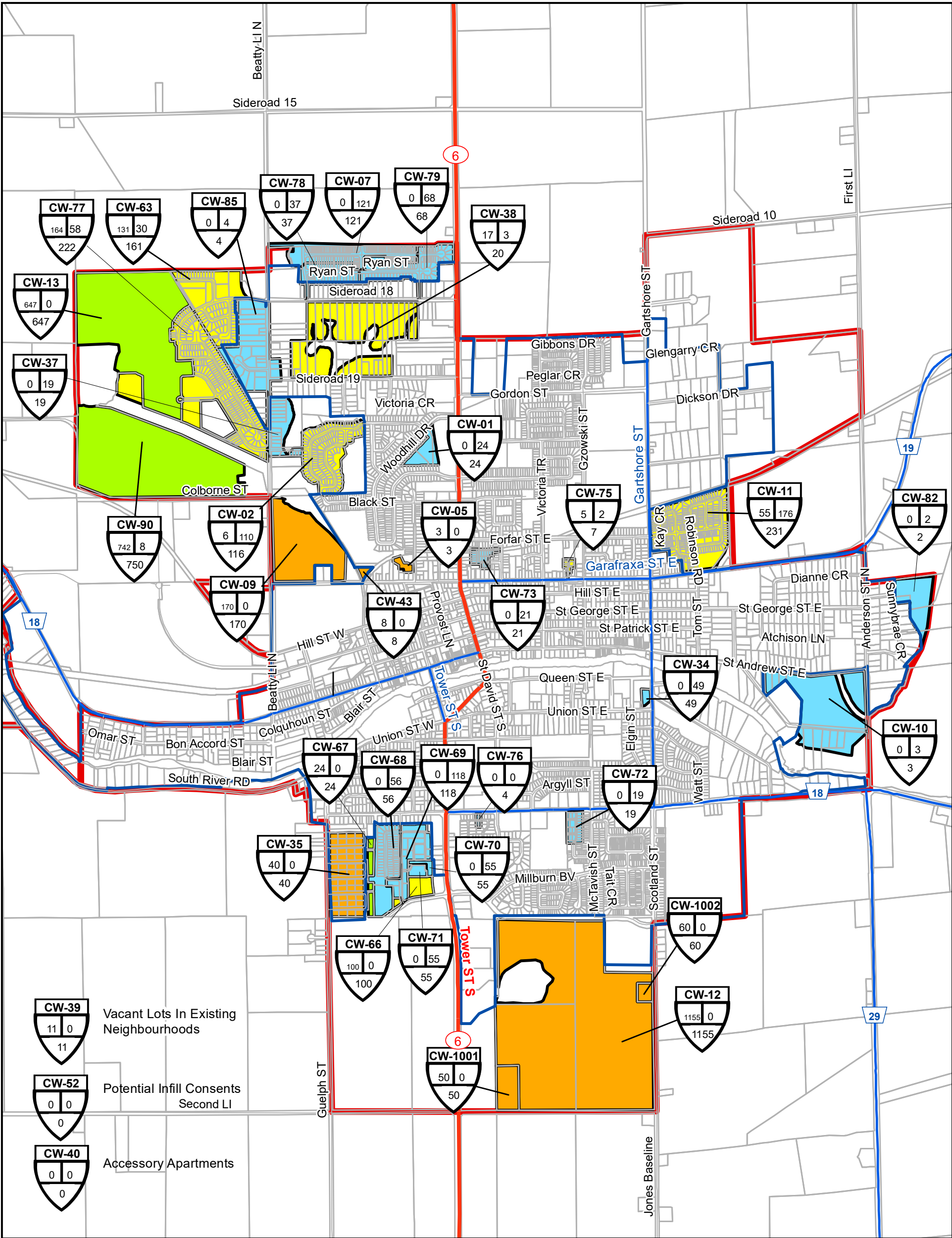
Centre Wellington Residential Supply Maps

As of July 1, 2019

CENTRE WELLINGTON LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

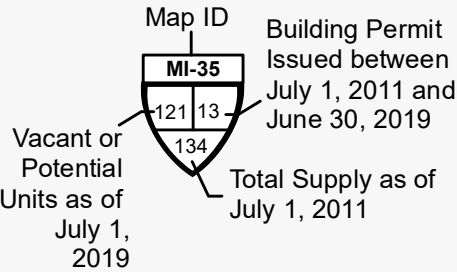
	Vacant & Potential Supply				
Area	Registered	Draft Approved or Provisional	Applications Under Review	Vacant Designated	TOTAL UNITS
URBAN CENTRES	568	2350	410	1699	5027
Elora-Salem	79	937	410	213	1639
Fergus	489	1413		1486	3388
OUTSIDE URBAN CENTRES	47	41	69	160	317
Belwood	5			140	145
Countryside	39				39
Ennotville				15	15
Inverhaugh	3		69	5	77
Rural Estate		41			41
MUNICIPAL TOTAL	615	2391	479	1859	5344

- NOTES:
1. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR)
 2. The figures contained in the table do not include lands designated future development.

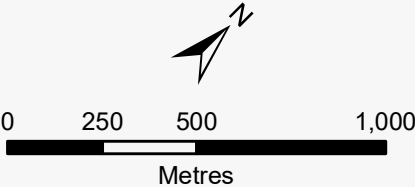


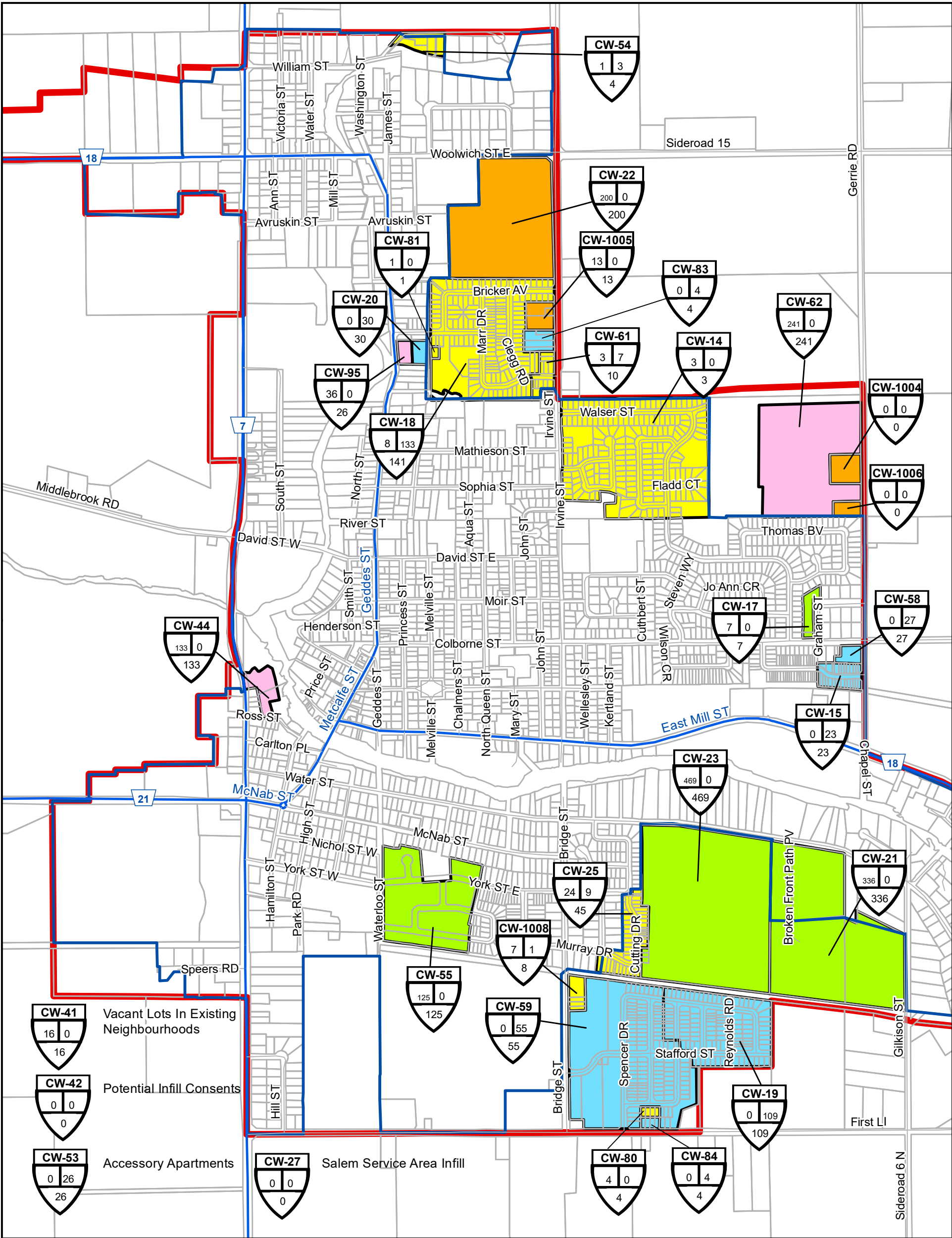
Residential Supply Category

- Built Boundary
- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011



Fergus
Residential Supply Inventory
with Built Boundary





Built Boundary

Vacant Designated

Application Under Review

Draft Approved Or Provisional

Registered

Built Out Since 2011

Map ID

MI-35

121 13

134

Vacant or Potential Units as of July 1, 2019

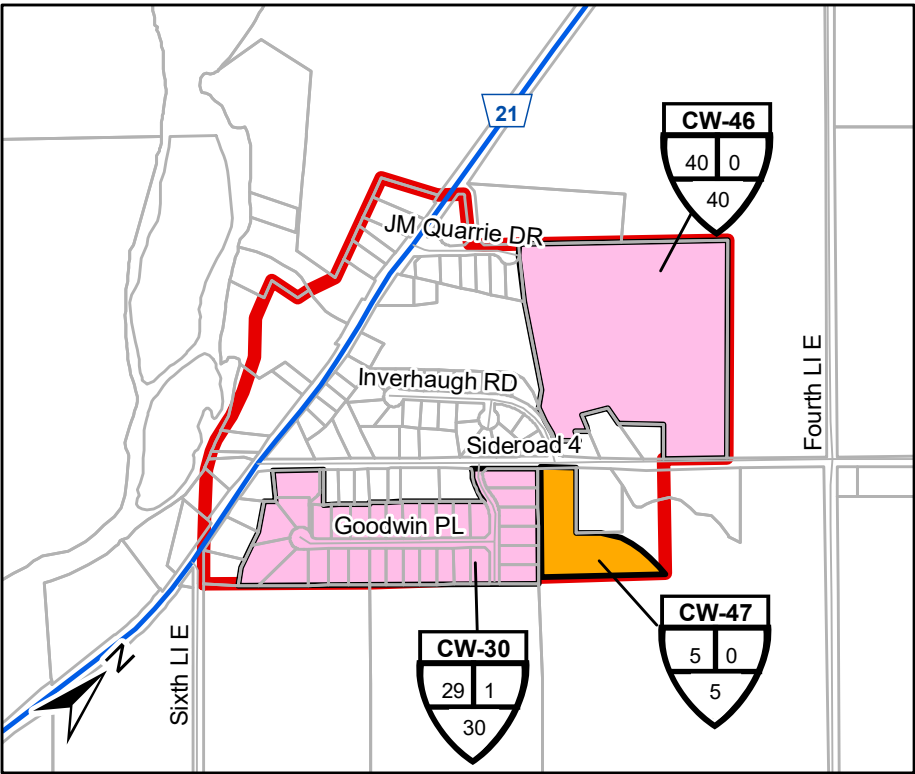
Building Permit Issued between July 1, 2011 and June 30, 2019

Total Supply as of July 1, 2011

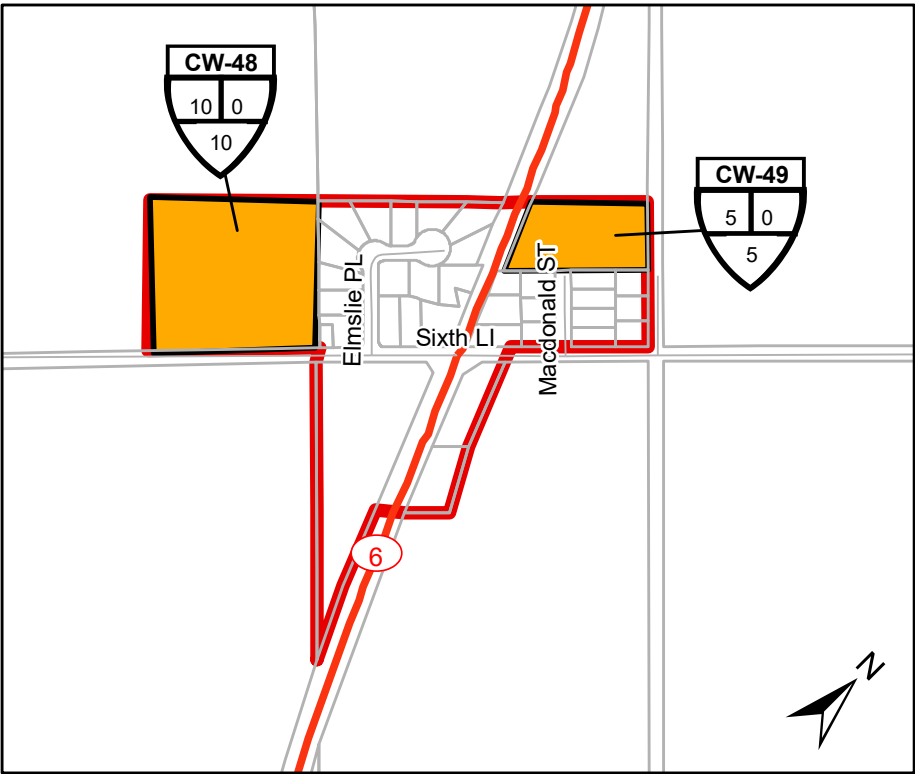
Elora/Salem Residential Supply Inventory with Built Boundary

F:\LIS\Projects\2019\CentreWellingtonSupplyAnalysis\Elora_ResidentialSupply.mxd

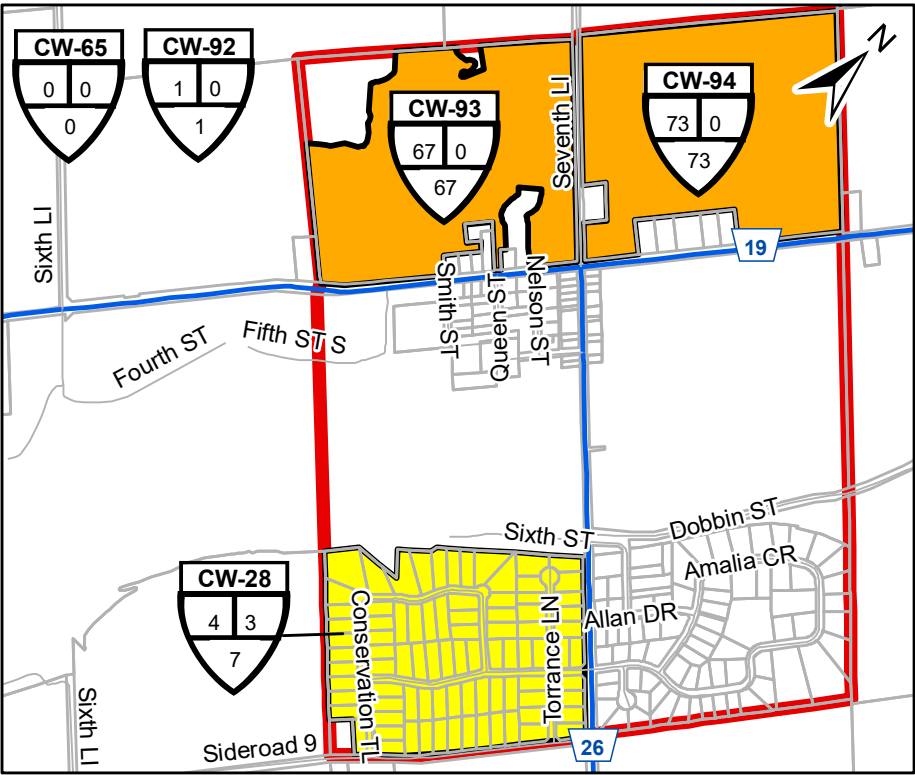
Last Edit: Tuesday, February 4, 2020



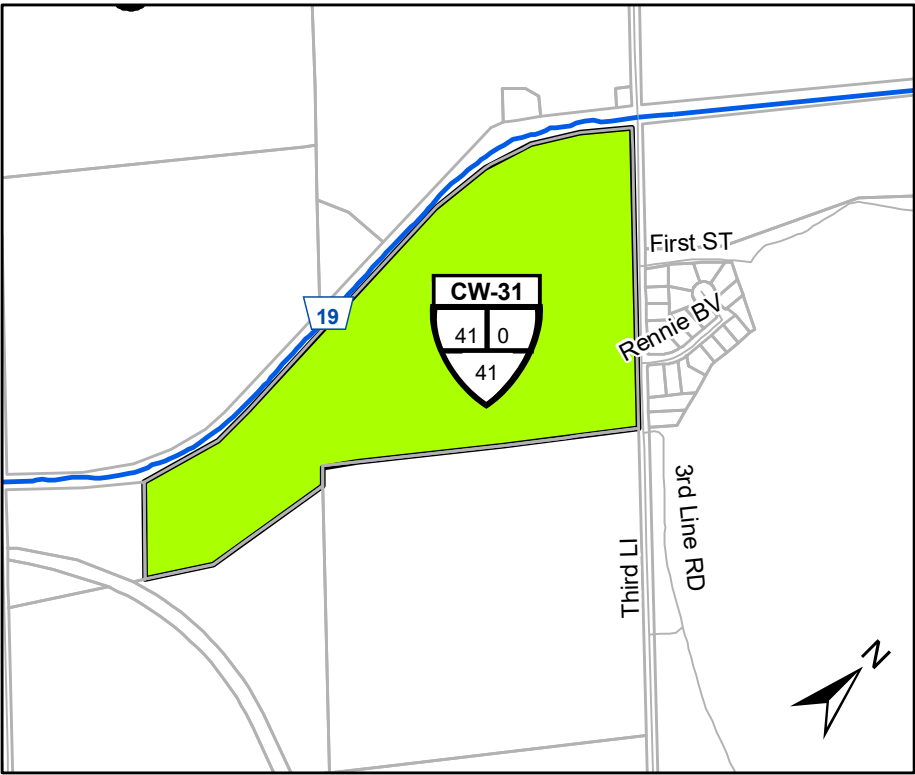
Vacant lots (CW-91), Weadick (CW-30), Inverhaugh Pasture Edge Farm (CW-46), Inverhaugh McMorris (CW-47)



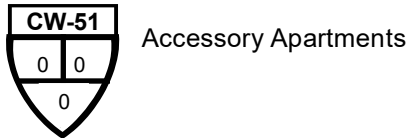
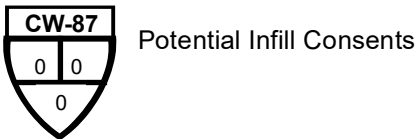
Ennotville West (CW-48), Ennotville East (CW-49)



Highland Lake (CW-28), Belwood North Infilling (CW-45), Vacant Lots (CW-92) Accessory Apartments (CW-65), Belwood Vacant Lots (CW-93), Belwood Vacant Lots (CW-94)

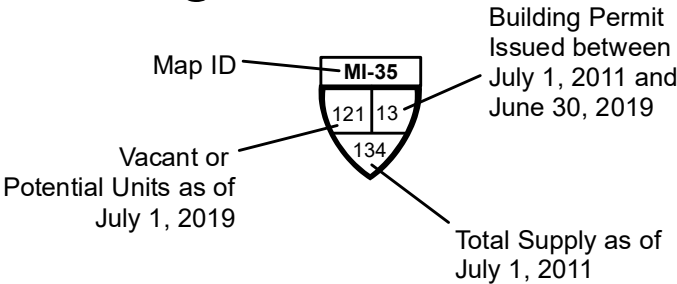


Fairview Golf Estates



Township of Centre Wellington Rural Residential Supply Inventory

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- ### Residential Supply Inventory
- Built Boundary
 - Vacant Designated
 - Application Under Review
 - Draft Approved Or Provisional
 - Registered
 - Built Out Since 2011

Erin

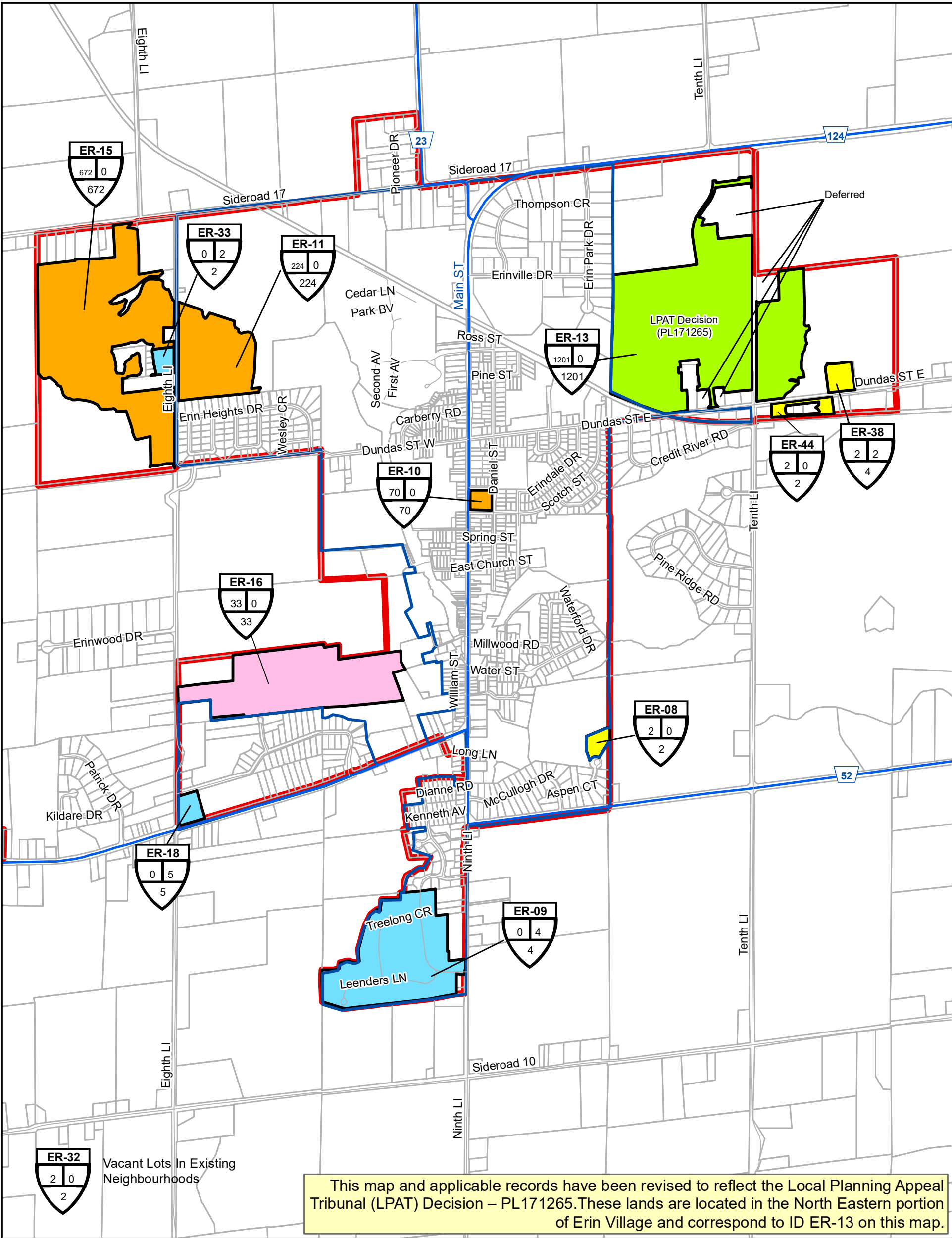
Residential Supply Maps

As of July 1, 2019

ERIN LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

Vacant & Potential Supply					
Area	Registered	Draft Approved or Provisional	Applications Under Review	Vacant Designated	TOTAL UNITS
URBAN CENTRES	12	1297	676	1814	3799
Erin Village	8	1201	33	966	2208
Hillsburgh	4	96	643	848	1591
OUTSIDE URBAN CENTRES	108	61	0	208	377
Brisbane	1			43	44
Ballinafad	9				9
Cedar Valley					0
Countryside	97			149	246
Crewson's Corner					0
Ospringe	1	60		8	69
Rural Estate		1		8	9
MUNICIPAL TOTAL	120	1358	676	2022	4176

- NOTES:
1. The unit yields identified on the maps and in the summary table assume full municipal servicing to lands within the urban centres of Hillsburgh and Erin and are provided for information purposes.
 2. It is Important to note that the potential supply of units exceeds the total potential growth for the Town of Erin to 2041 as determined through OPA 99. The Town of Erin is required to amend its official plan to confirm the future growth forecasts to be assigned to Hillsburgh and Erin within the ranges of projected growth specified in Table 7 of the County Official Plan.
 3. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR).
 4. The figures contained in the table do not include lands designated future development.
 5. These figures have been revised to reflect LPAT Decision PL171265 which was issued post-July 2019



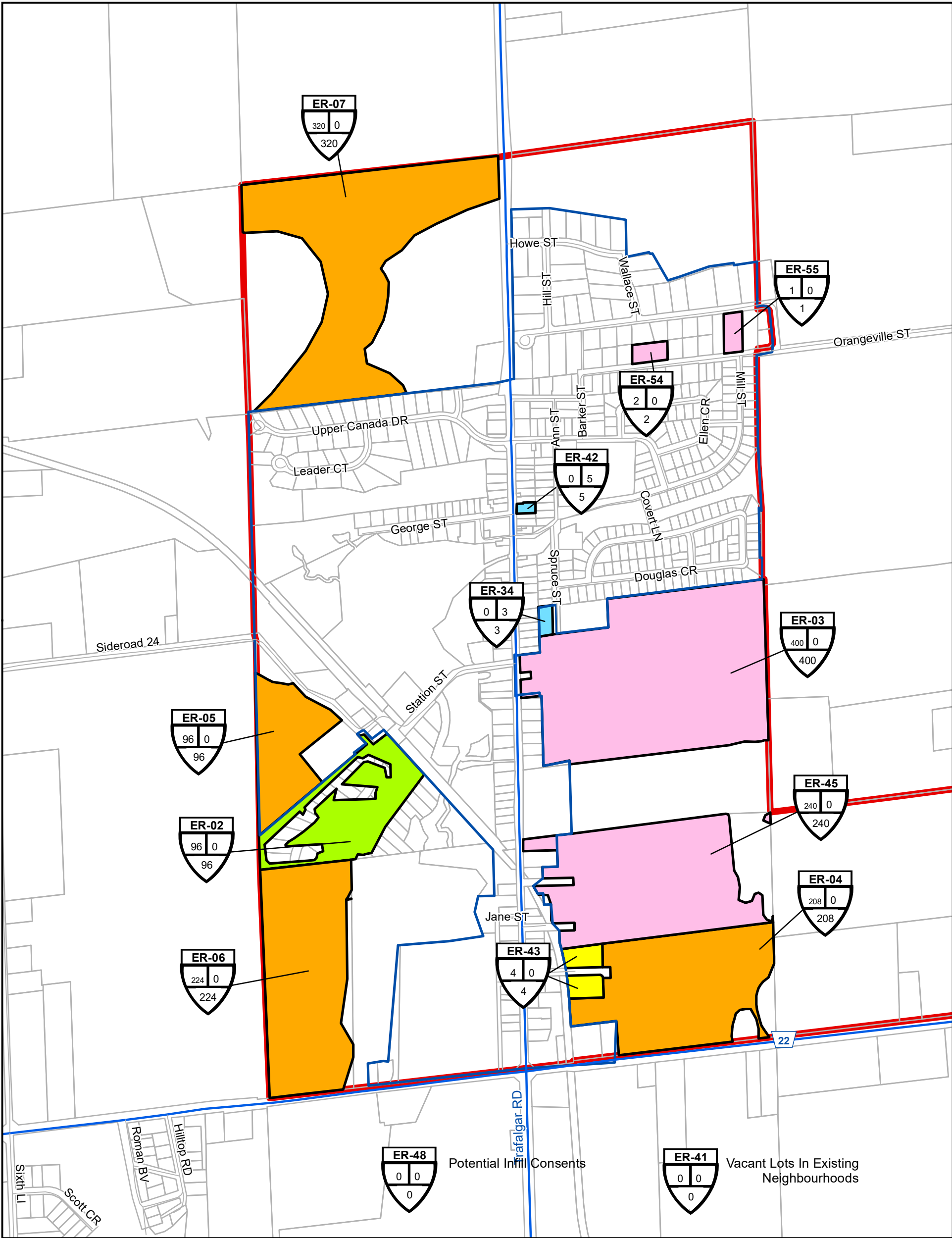
Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Map ID
MI-35
121 13
134
Vacant or Potential Units as of July 1, 2019
Building Permit Issued between July 1, 2011 and June 30, 2019
Total Supply as of July 1, 2011

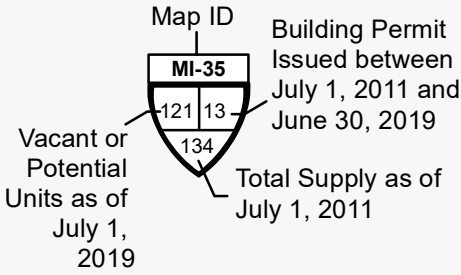
**Village of Erin
Residential Supply Inventory
with Built Boundary**

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Metres

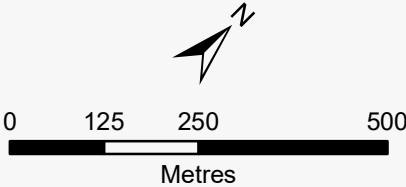


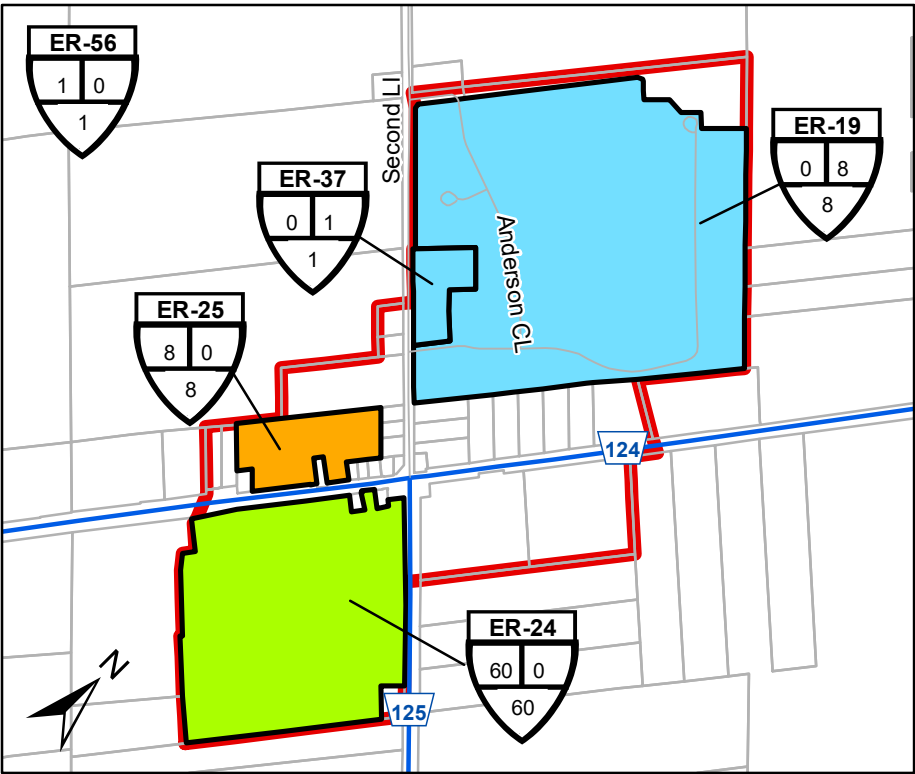
Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

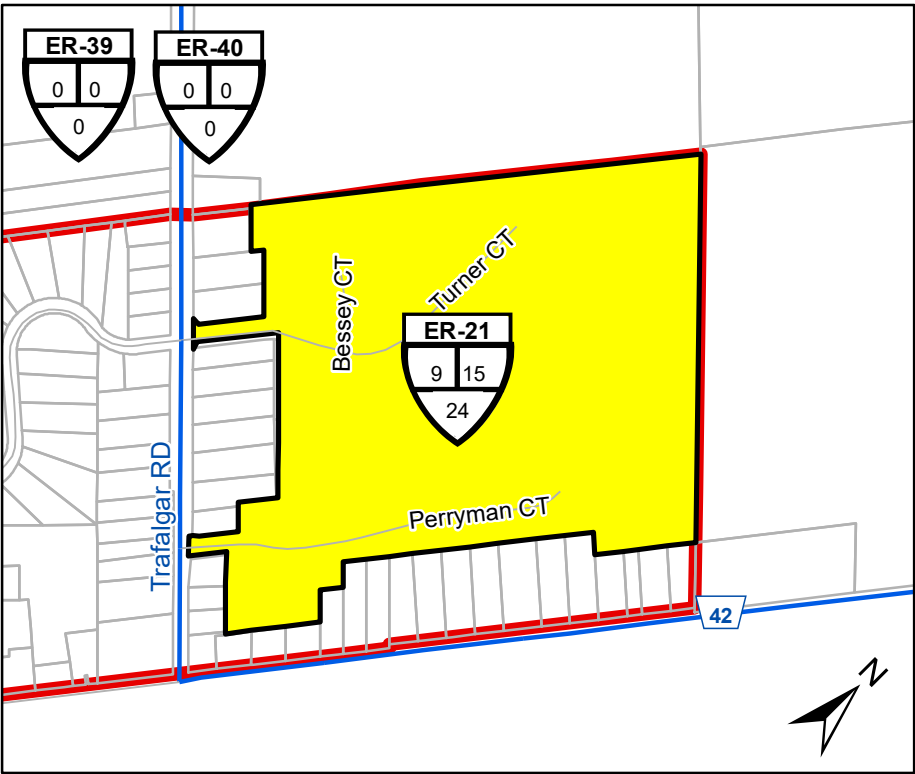


Hillsburgh
Residential Supply Inventory
with Built Boundary

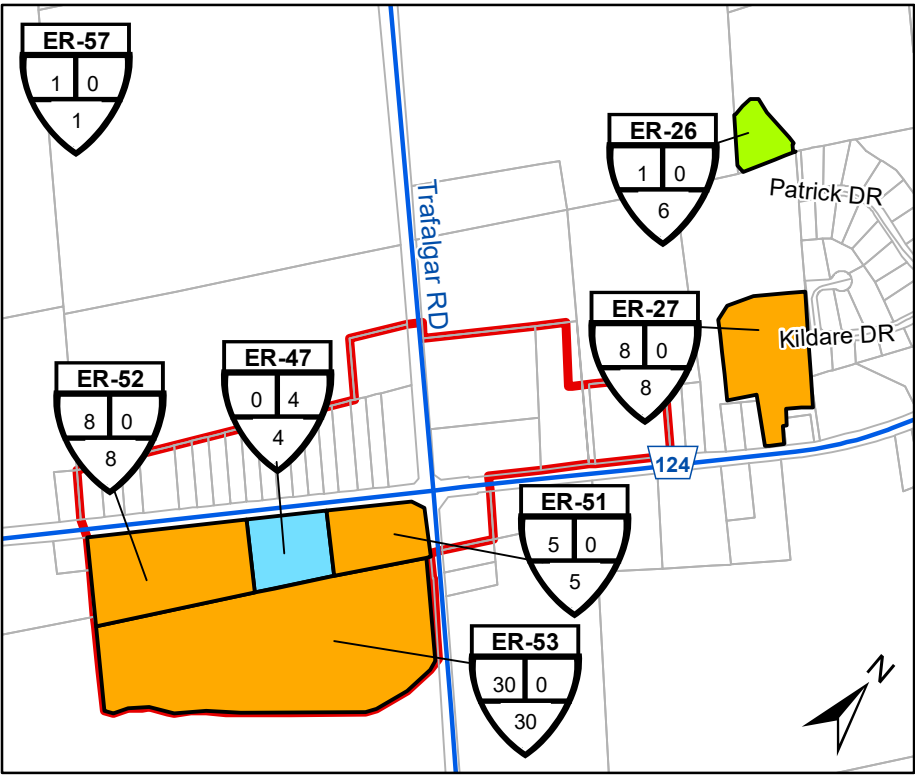




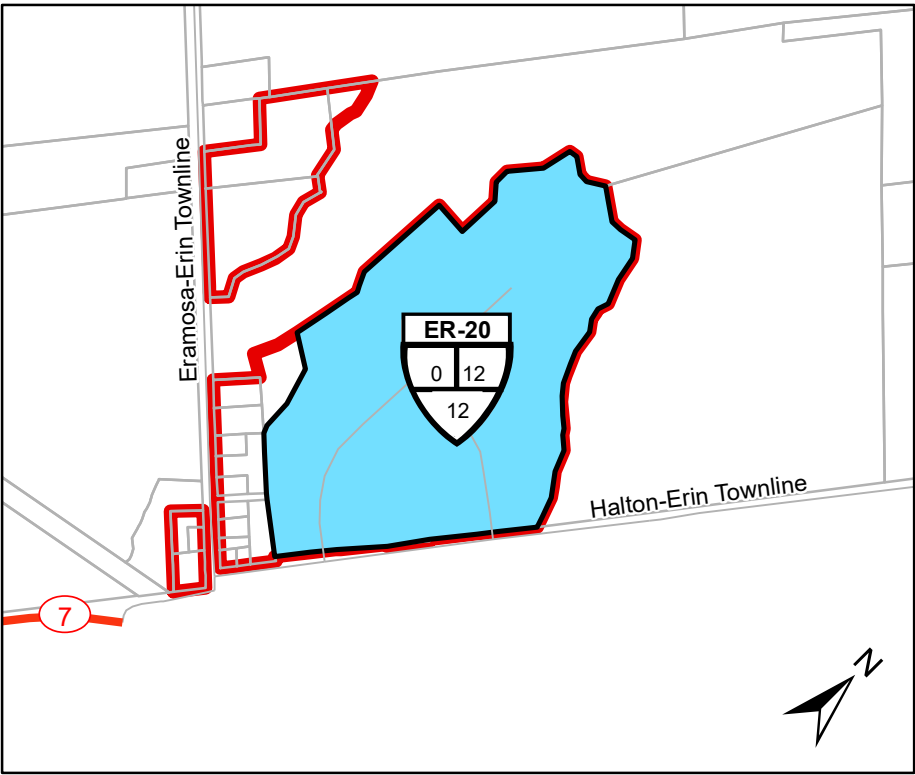
Madison Lake Estates (ER-19), Thomasfield Homes LTD (ER-24), Ospringle NW (ER-25), Vacant Lots in Ospringle (ER-56) and Second Line Vacant Lots (ER-37)



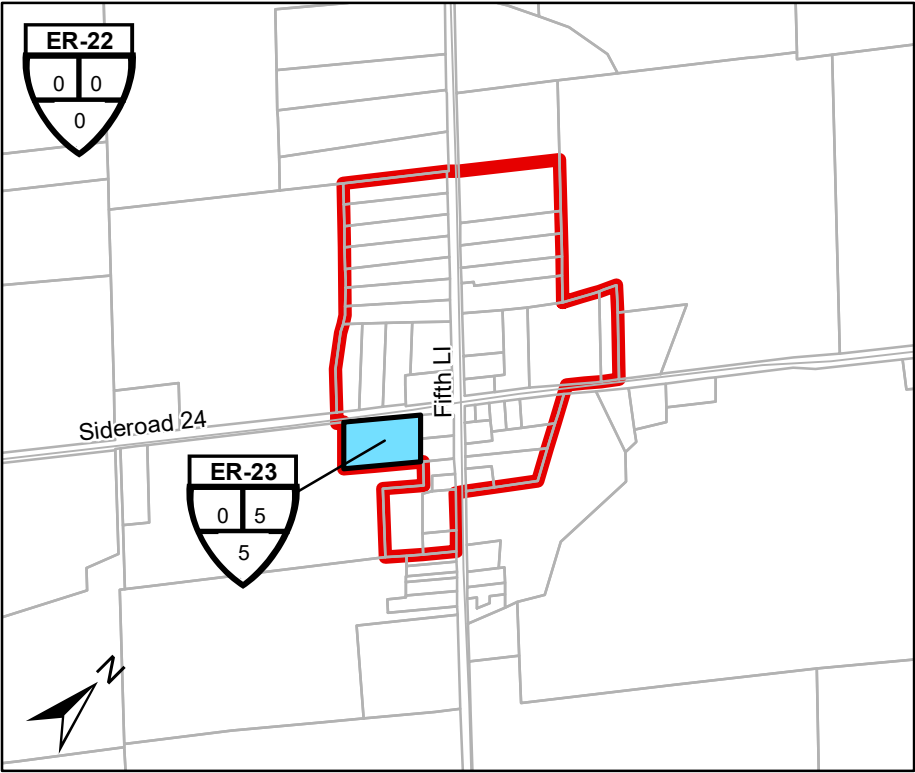
Silvercreek Meadows (ER-21), Vacant Lots in Ballinafad (ER-39) and Accessory Apartments in Ballinafad (ER-40)



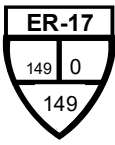
Sopinka/Reed (ER-26), Van Miller (ER-27), 124 Severances (ER-47), John Cook Sevs 124 & 25 (ER-51), John Cook Sevs 124 (ER-52), David Cook (ER-53) and Vacant Lots in Brisbane (ER-57)



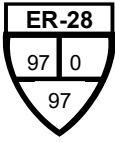
Crewson's Ridge (ER-20)



Cedar Valley Severances Along SR 24 (ER-23) and Cedar Valley Vacant Lots (ER-22)



Potential Infill Consents



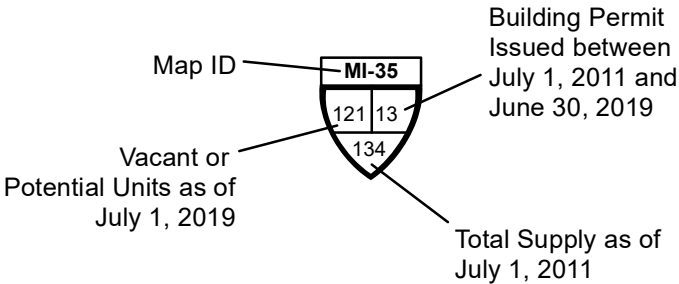
Vacant Lots In Existing Neighbourhoods



Accessory Apartments

Town of Erin Rural Residential Supply Inventory

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Residential Supply

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Guelph-Eramosa Residential Supply Maps

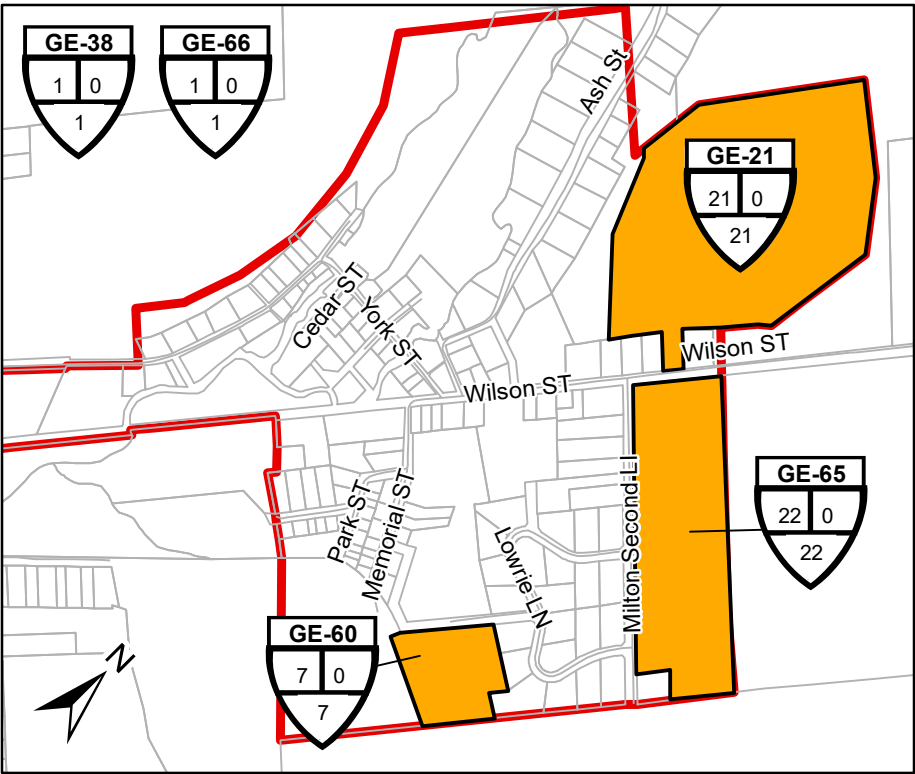
As of July 1, 2019

GUELPH-ERAMOSA LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

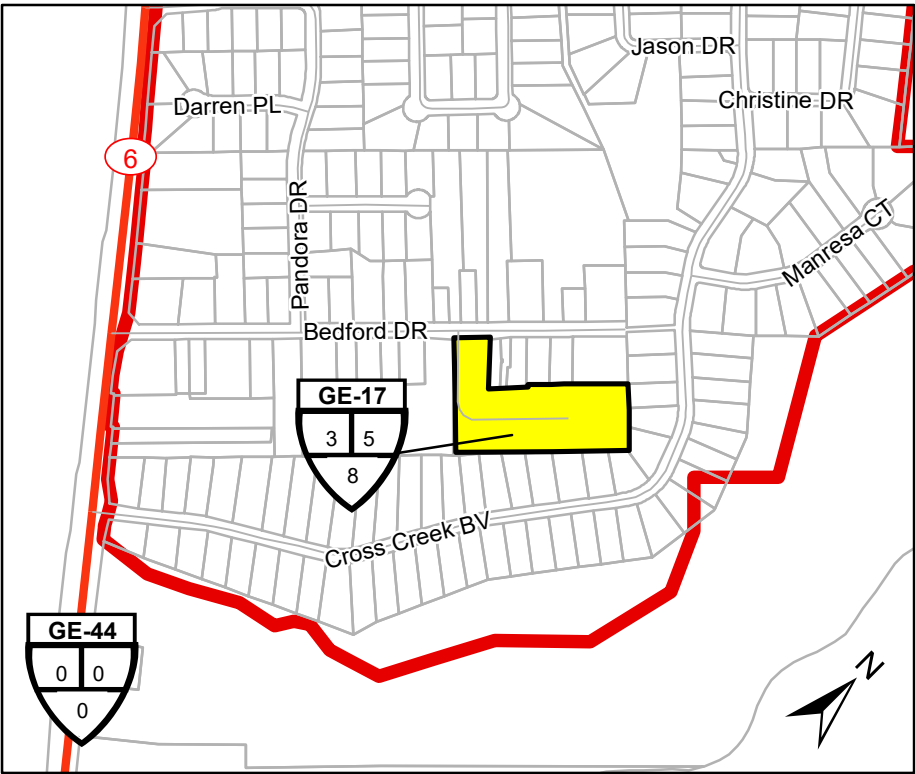
Vacant & Potential Supply					
Area	Draft				TOTAL UNITS
	Registered	Approved or Provisional	Applications Under Review	Vacant Designated	
URBAN CENTRES	87	12	111	13	223
Rockwood	87	12	111	13	223
OUTSIDE URBAN CENTRES	70	5	0	104	179
Ariss	18	0	0	31	49
Countryside	41	0	0	0	41
Eden Mills	1	0	0	51	52
Everton	2	5	0	3	10
Hamilton Drive	3	0	0	0	3
Hartfield	4	0	0	4	8
Marden	0	0	0	4	4
Oustic	0	0	0	2	2
Promenade Park	1	0	0	0	1
Shadow Beach	0	0	0	9	9
MUNICIPAL TOTAL	157	17	111	117	402

NOTES:

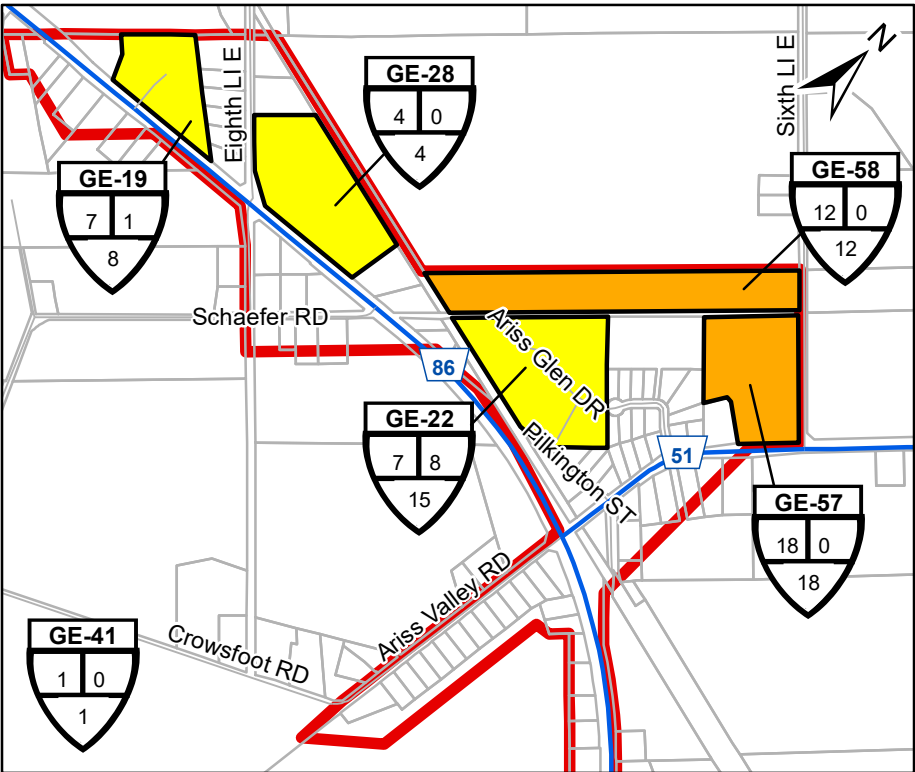
- 1. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR).
- 2. The figures contained in the table do not include lands designated future development.



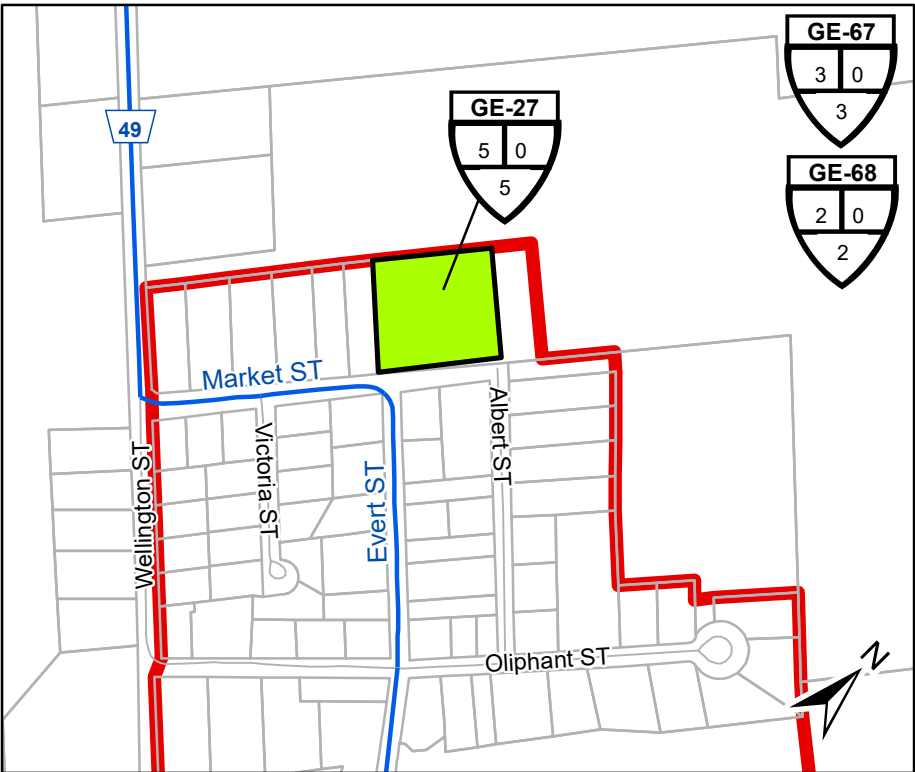
Eden Mills Fontanatos (GE-21), Vacant Land Eden Mills (GE-65), Unnamed Eden Mills (GE-60), Eden Mills Potential Consents (GE-66) and Eden Mills Vacant Lots (GE-38)



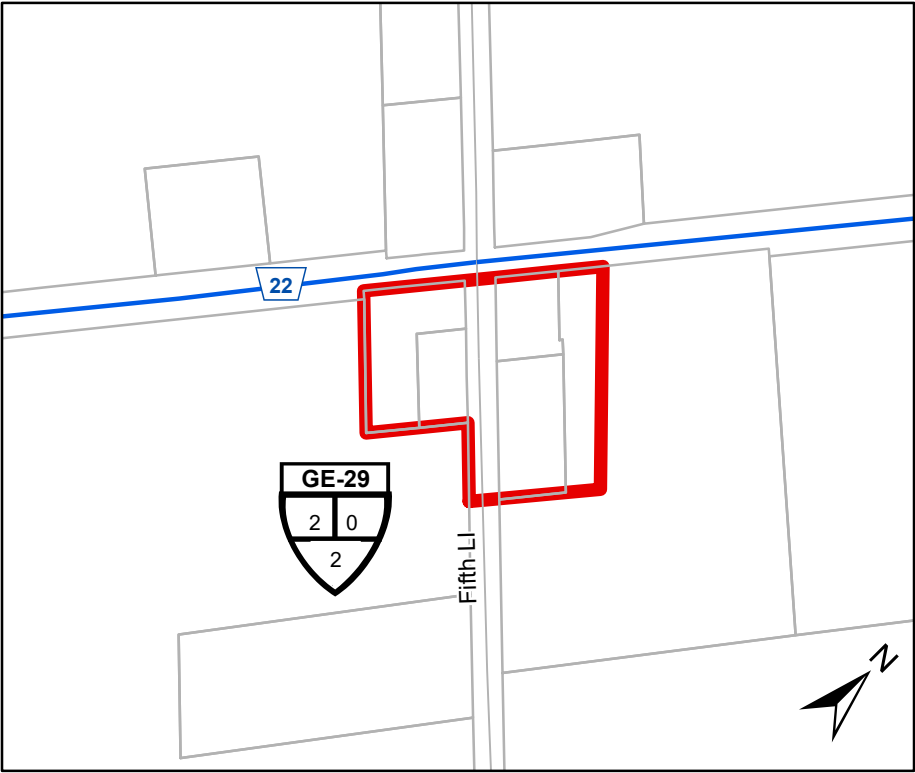
Martone (GE-17) and Hamilton Drive Vacant Lots (GE-44)



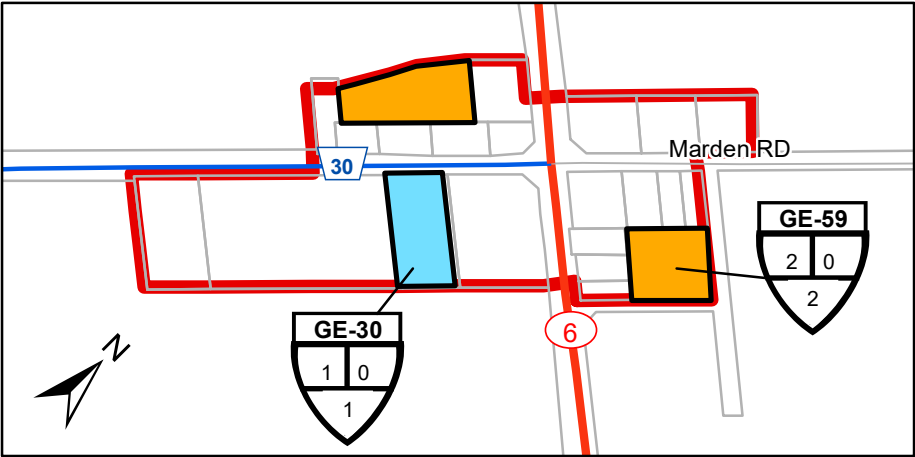
Elsig Estates (GE-19), Usher's Creek (GE-22), Ariss NE 86 and 8th Line (GE-28), Ariss Sixth Line (GE-57), Ariss Brohman Lands (GE-58) and Ariss Infilling (GE-41)



Eilers (GE-27), Potential Infill (GE-67) and Vacant Lots (GE-68)



Oustic Infilling (GE-29)



Marden (GE-30), Marden Vacant Lots (GE-59)



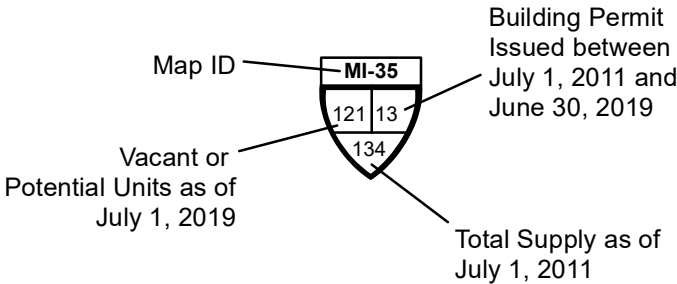
GE-25 Potential Infill Consents



GE-26 Vacant Lots In Existing Neighbourhoods

Township of Guelph-Eramosa Rural Residential Supply Inventory

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Legend

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Mapleton Residential Supply Maps

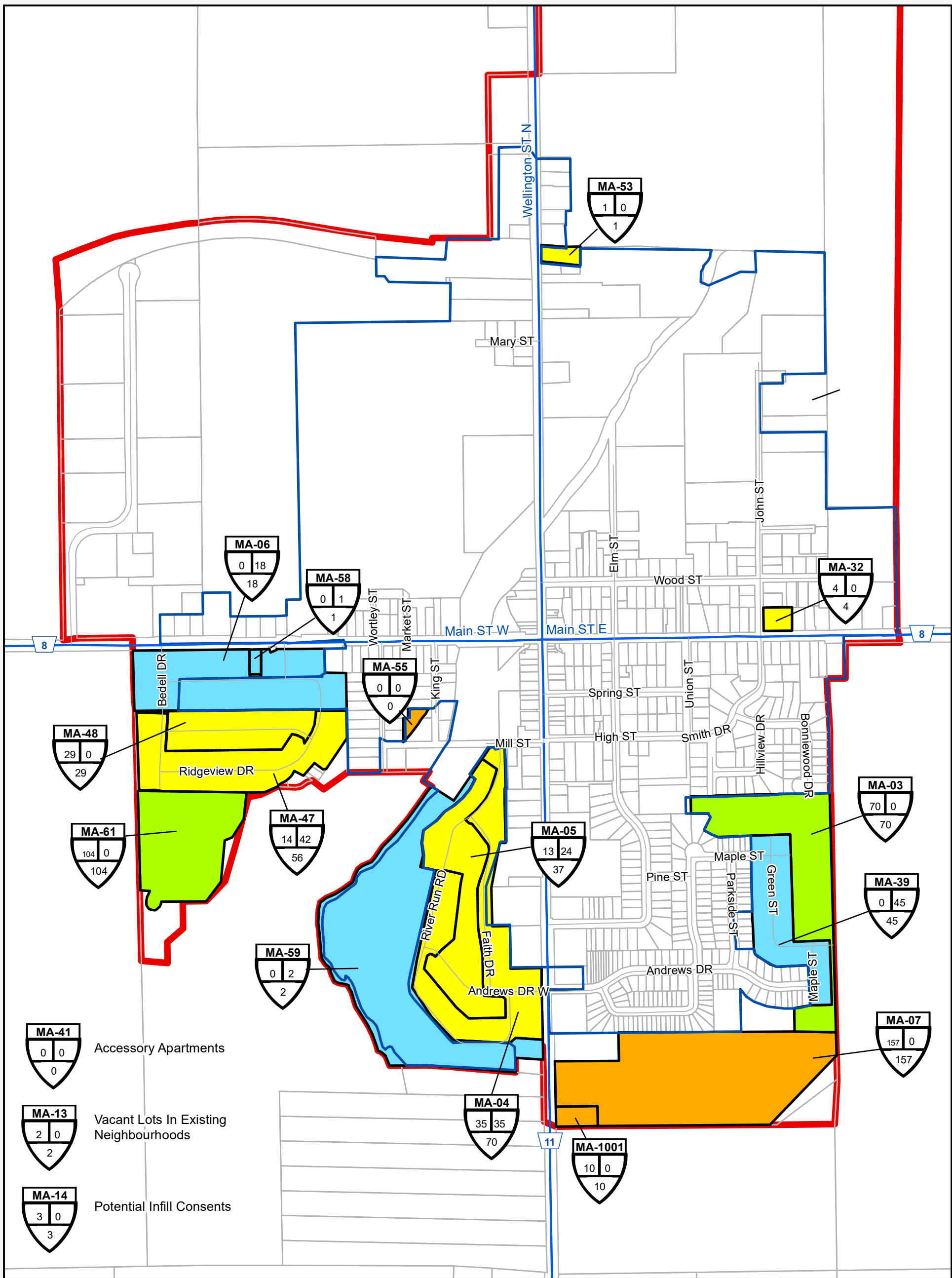
As of July 1, 2019

MAPLETON LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

Area	Vacant & Potential Supply				TOTAL UNITS
	Registered	Draft Approved or Provisional	Applications Under Review	Vacant Designated	
URBAN CENTRES	108	174	0	696	978
Drayton	98	174	0	170	442
Moorefield	10	0	0	526	536
OUTSIDE URBAN CENTRES	101	34	0	0	135
Alma	3	0	0	0	3
Glen Allan	4	0	0	0	4
Lot 16, Con 12 Maryboro	0	0	0	0	0
Rothsay	9	0	0	0	9
Countryside	69	0	0	0	69
Rural Estate	16	34	0	0	50
MUNICIPAL TOTAL	209	208	0	696	1113

NOTES:

- 1. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR).
- 2. The figures contained in the table do not include lands designated future development.



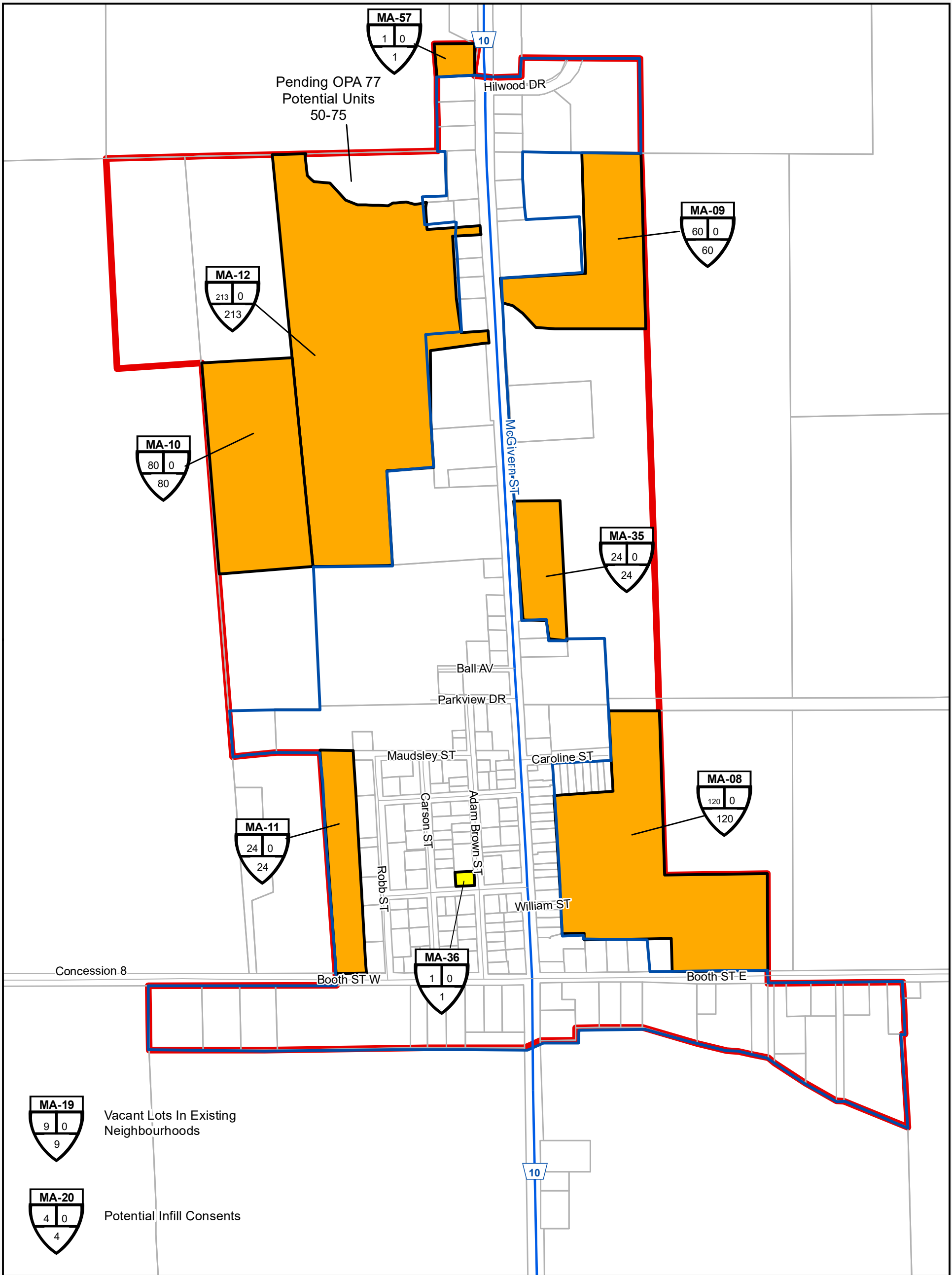
Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Map ID
MI-35
Building Permit Issued between July 1, 2011 and June 30, 2016
Vacant or Potential Units as of July 1, 2016
Total Supply as of July 1, 2011

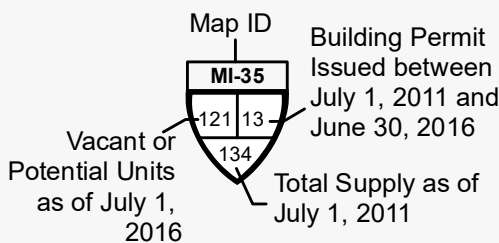
Drayton Residential Supply Inventory with Built Boundary

0 125 250 500
Metres

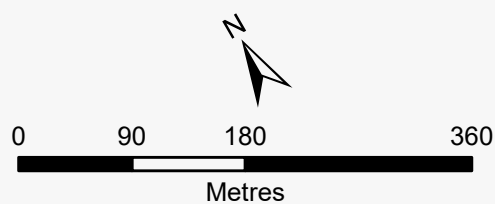


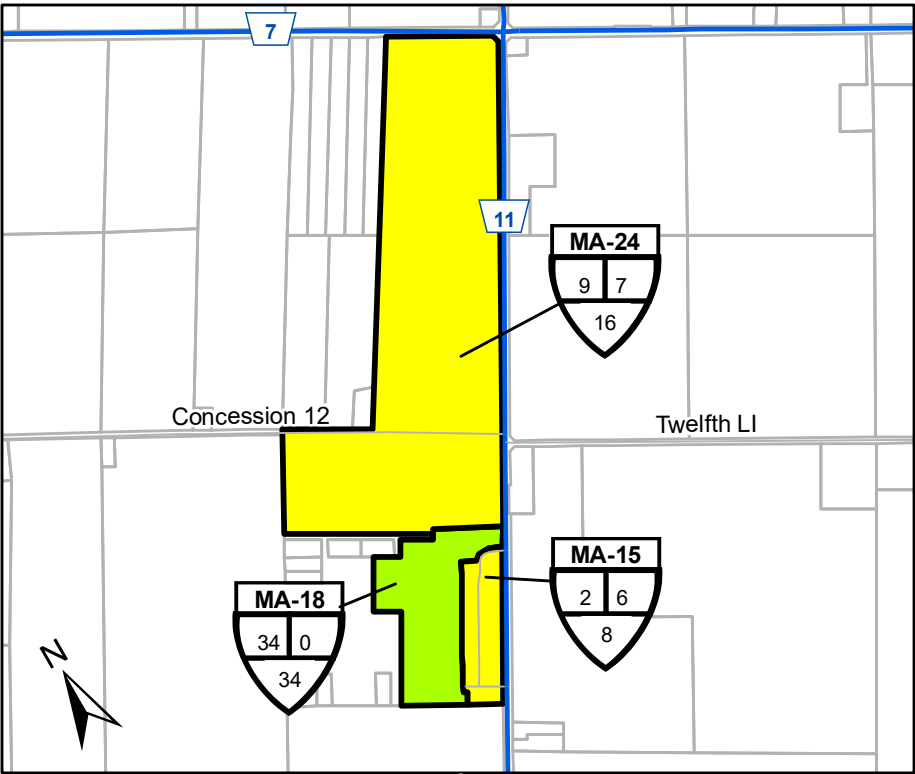
Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

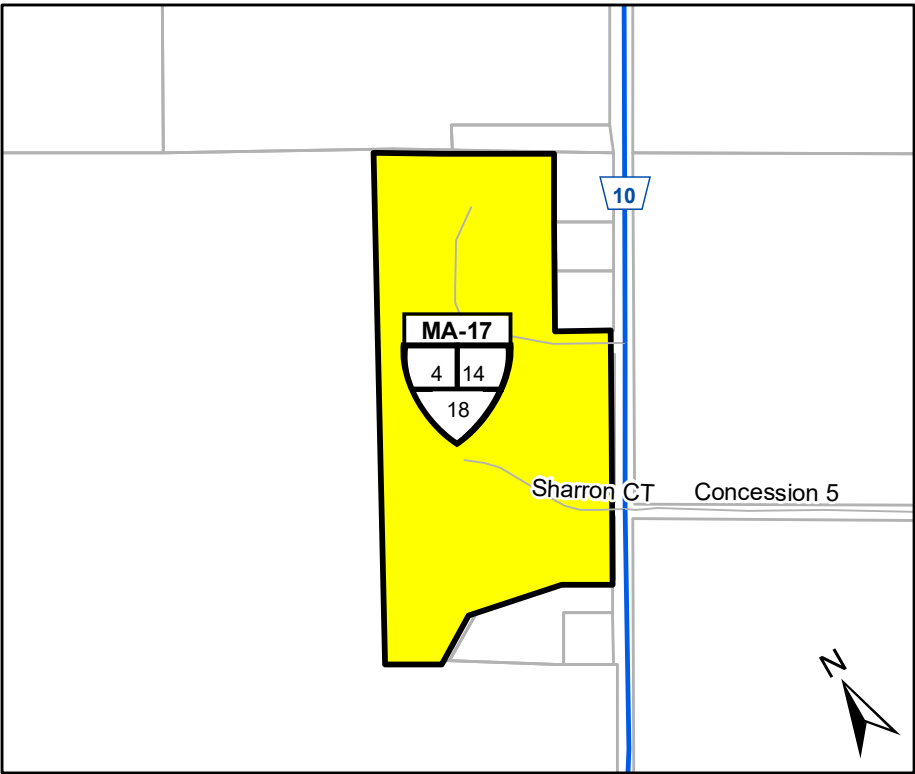


Moorefield Residential Supply Inventory with Built Boundary

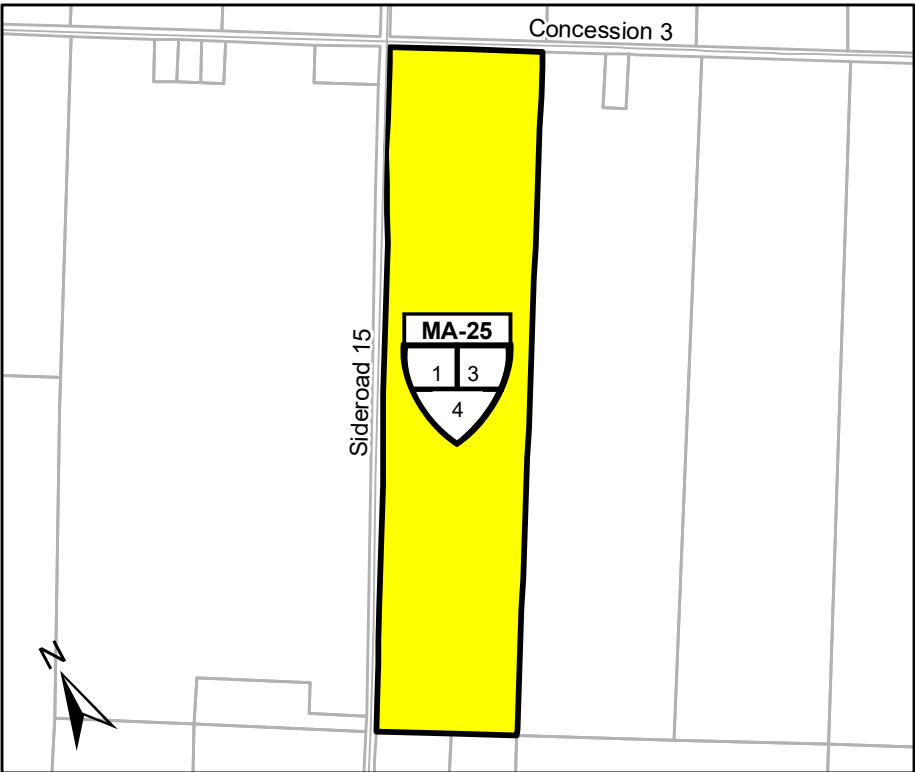




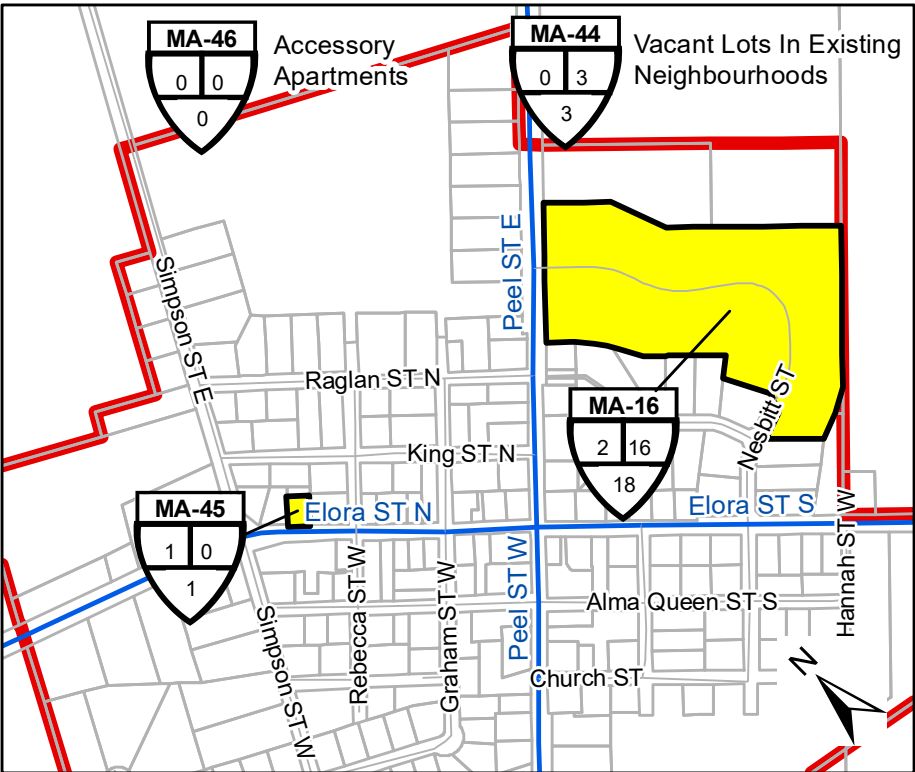
Riverview Heights - Phase 1 (MA-15) & Phase 2 (MA-18), Lot 18 Con 11-12 Maryborough (MA-24)



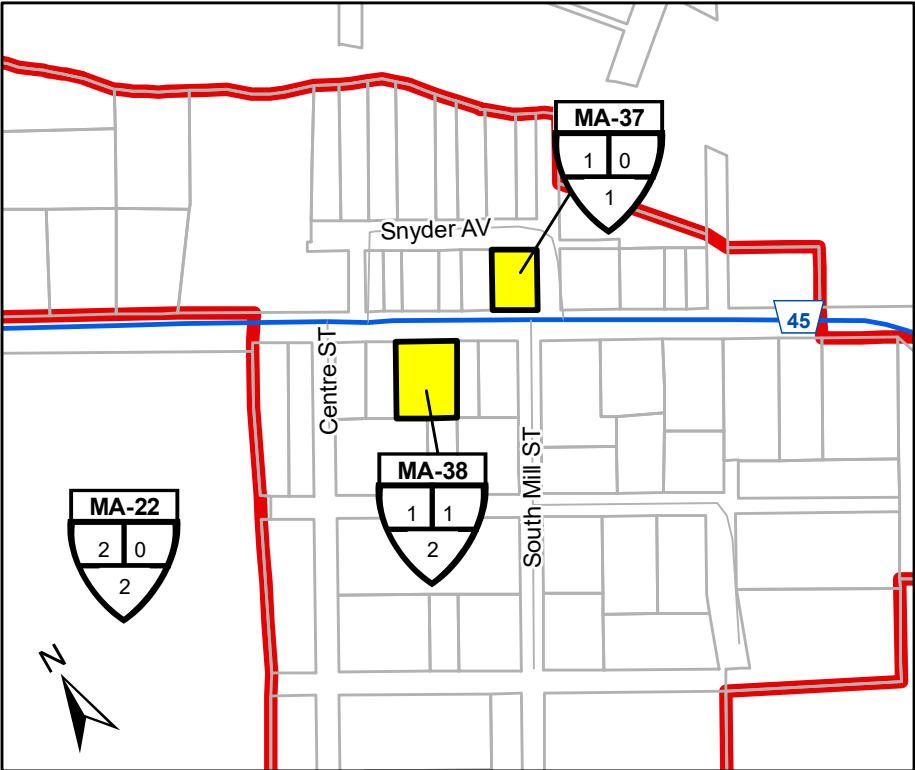
Wyndot Estates



Lot 16 Con 2 Maryborough



Alma Community Hall (MA-45) and Alma Crossing (MA-16)



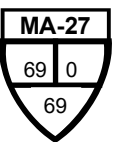
Donkers North (MA-37), Donkers North (MA-38) and Glen Allan Vacant Lots (MA-22)



Potential Rural Consents



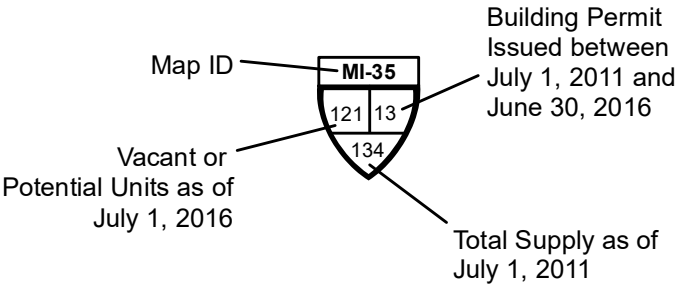
Rural Accessory Apartments



Vacant Rural Lots

Township of Mapleton Rural Residential Supply Inventory

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Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Mapleton Residential Supply Maps

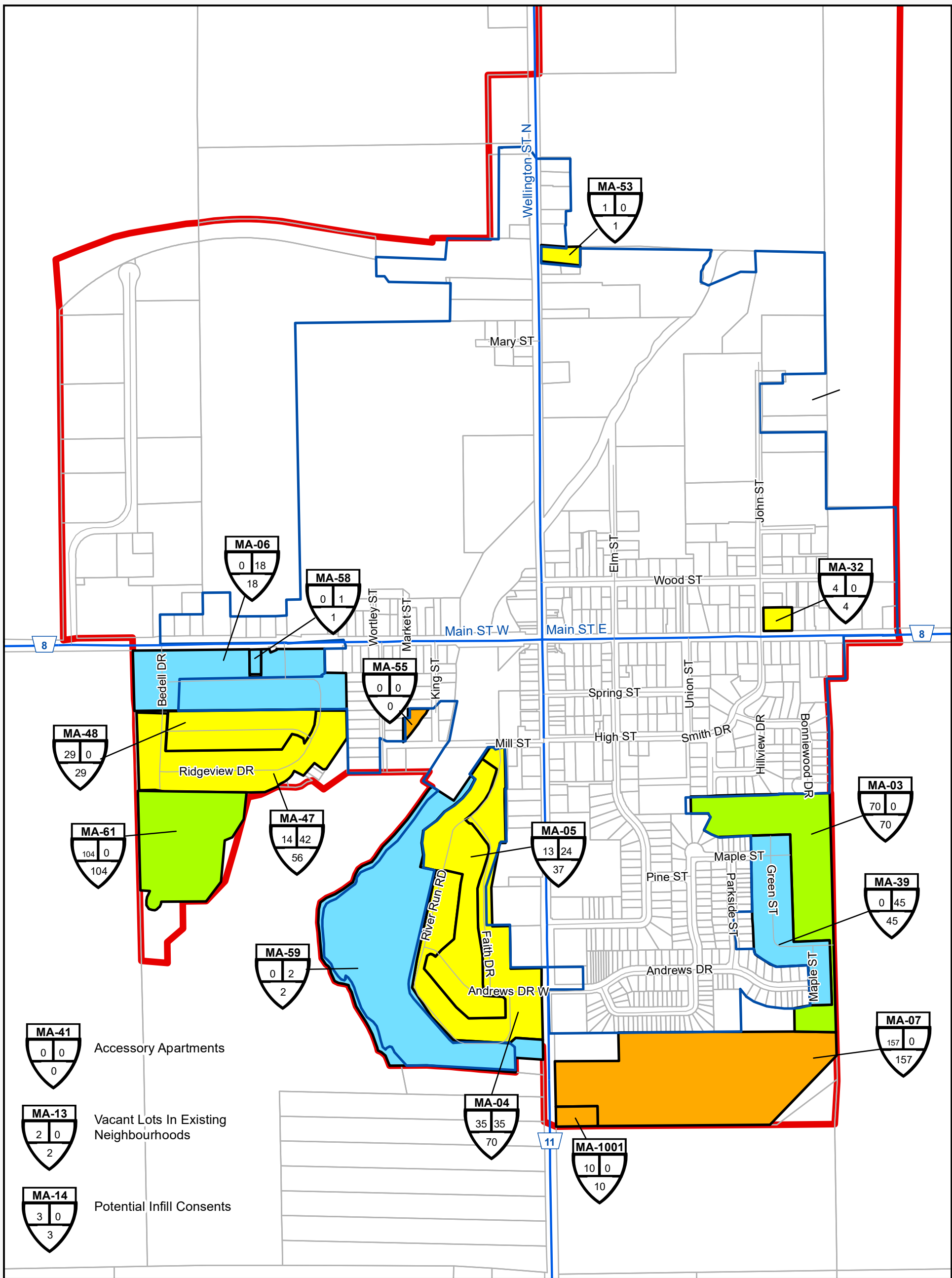
As of July 1, 2019

MAPLETON LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

Area	Vacant & Potential Supply				TOTAL UNITS
	Registered	Draft Approved or Provisional	Applications Under Review	Vacant Designated	
URBAN CENTRES	108	174	0	696	978
Drayton	98	174	0	170	442
Moorefield	10	0	0	526	536
OUTSIDE URBAN CENTRES	101	34	0	0	135
Alma	3	0	0	0	3
Glen Allan	4	0	0	0	4
Lot 16, Con 12 Maryboro	0	0	0	0	0
Rothsay	9	0	0	0	9
Countryside	69	0	0	0	69
Rural Estate	16	34	0	0	50
MUNICIPAL TOTAL	209	208	0	696	1113

NOTES:

- 1. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR).
- 2. The figures contained in the table do not include lands designated future development.



Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

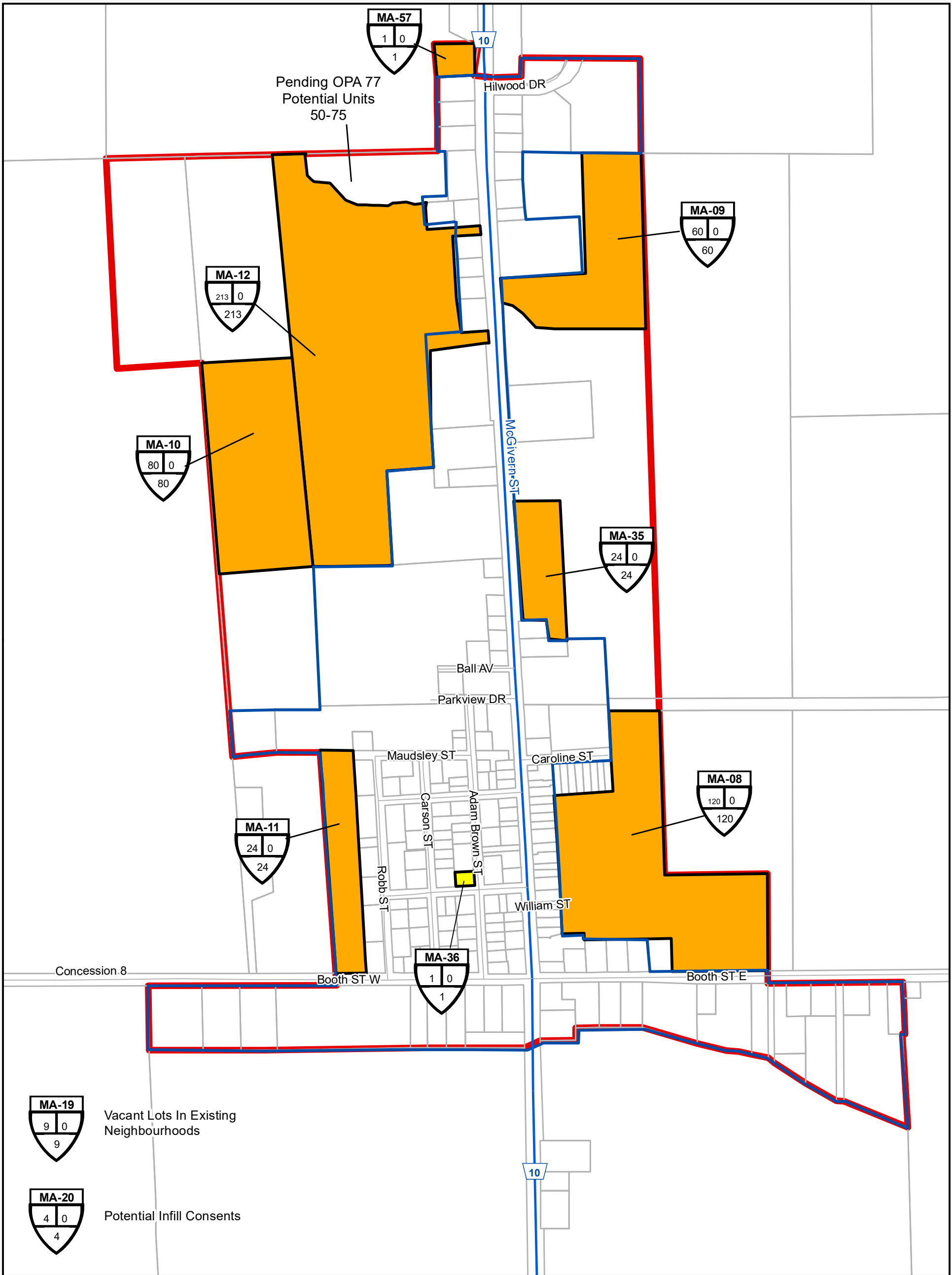
Map ID

Map ID	Vacant or Potential Units as of July 1, 2016	Total Supply as of July 1, 2011
MI-35	121	13
	134	

Building Permit Issued between July 1, 2011 and June 30, 2016

Drayton Residential Supply Inventory with Built Boundary

0 125 250 500 Metres



Residential Supply Category

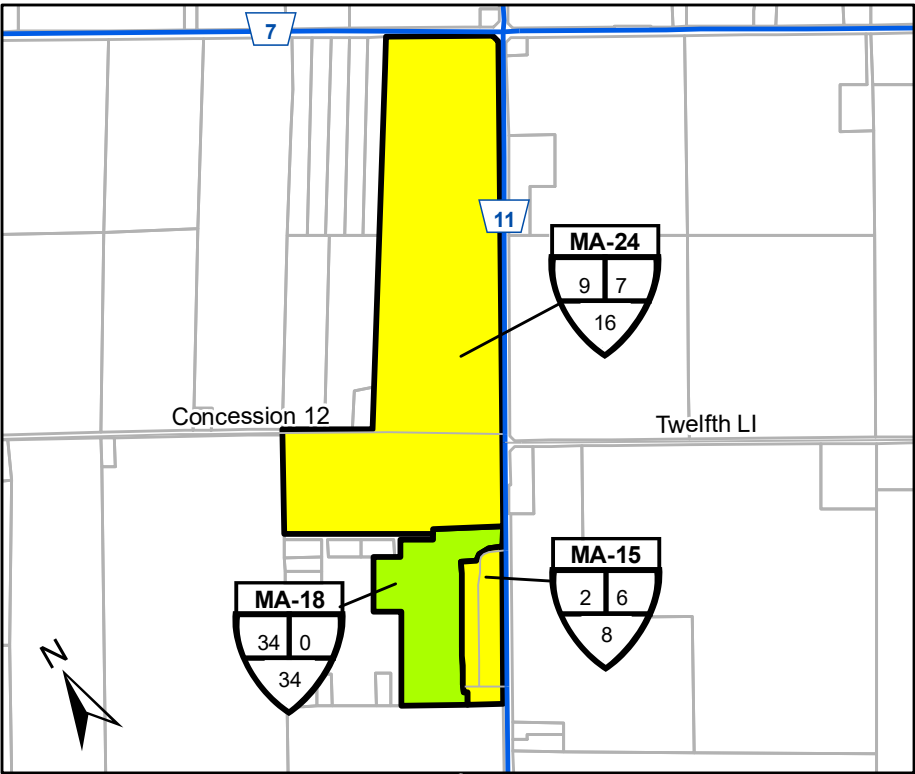
- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Map ID
MI-35
Building Permit Issued between July 1, 2011 and June 30, 2016
Vacant or Potential Units as of July 1, 2016
Total Supply as of July 1, 2011

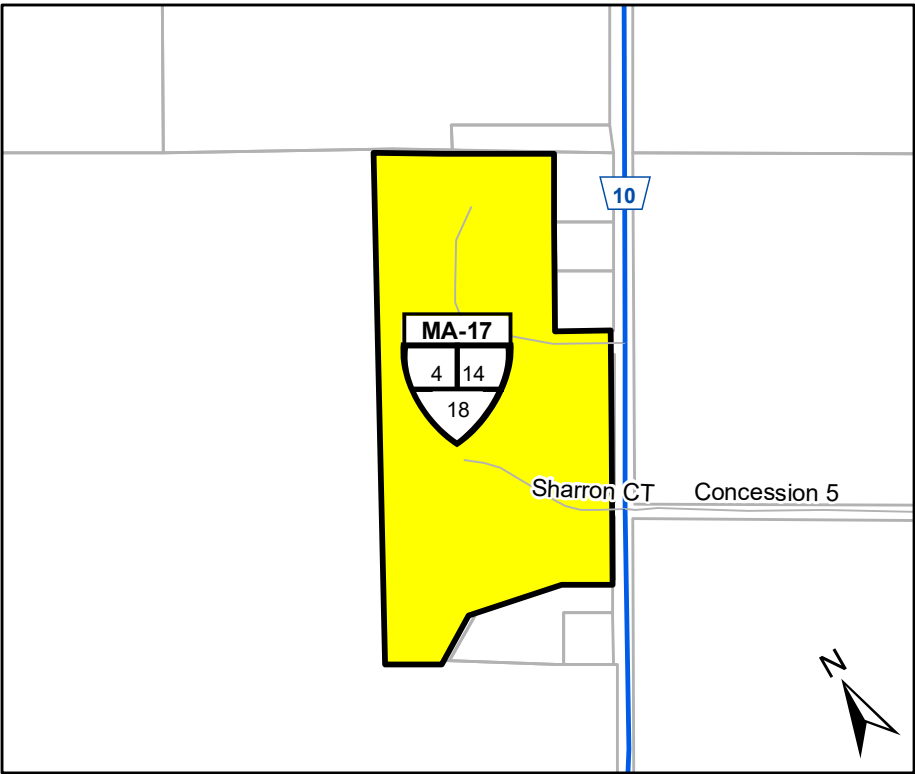
**Moorefield
Residential Supply Inventory
with Built Boundary**

0 90 180 360
Metres

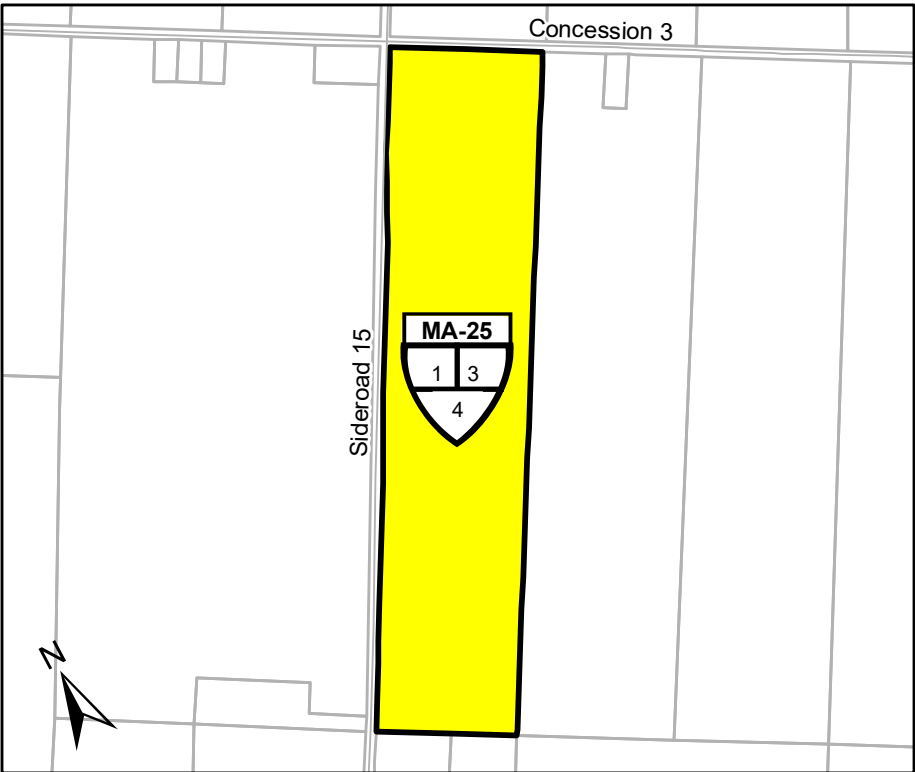
Last Edit: Tuesday, November 5, 2019



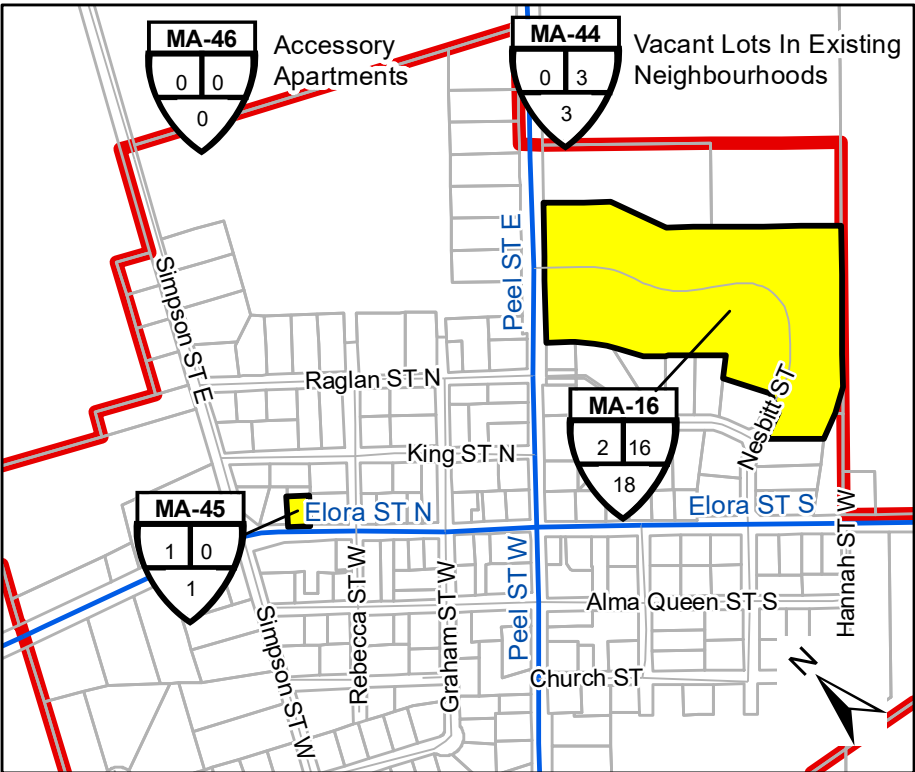
Riverview Heights - Phase 1 (MA-15) & Phase 2 (MA-18), Lot 18 Con 11-12 Maryborough (MA-24)



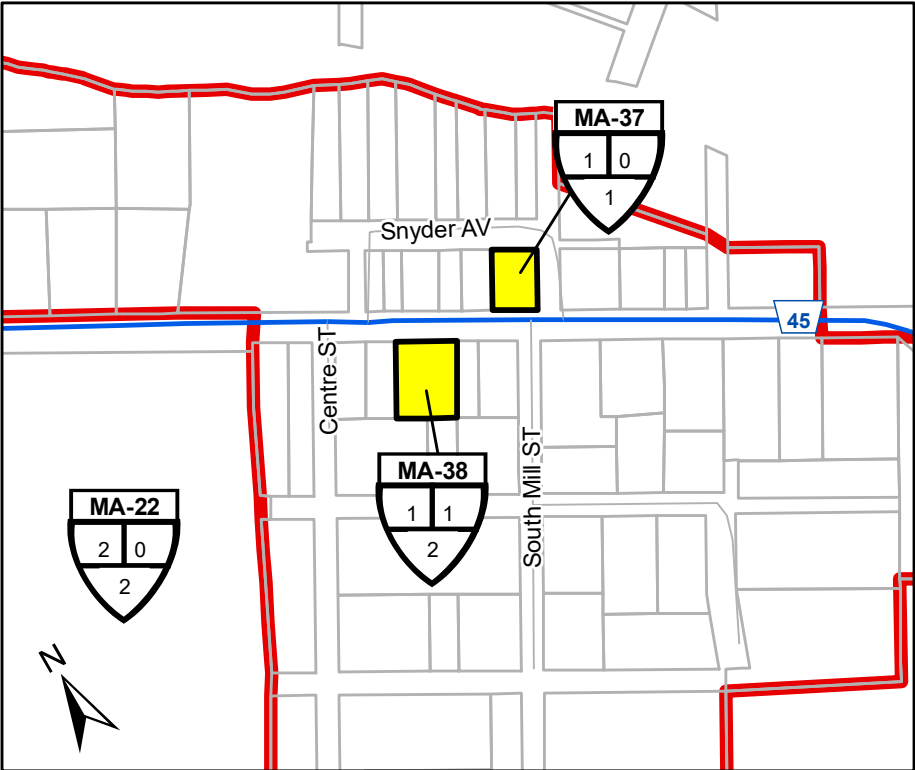
Wyndot Estates



Lot 16 Con 2 Maryborough



Alma Community Hall (MA-45) and Alma Crossing (MA-16)



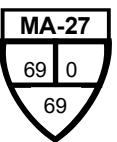
Donkers North (MA-37), Donkers North (MA-38) and Glen Allan Vacant Lots (MA-22)



Potential Rural Consents



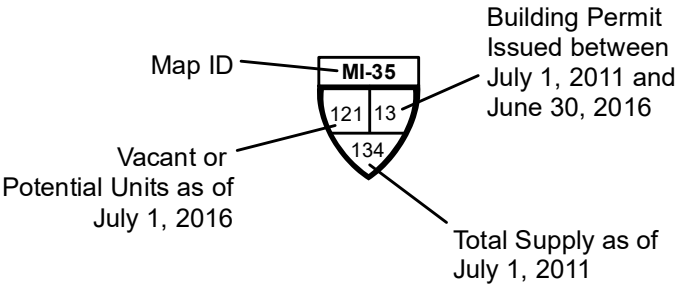
Rural Accessory Apartments



Vacant Rural Lots

Township of Mapleton Rural Residential Supply Inventory

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Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Minto

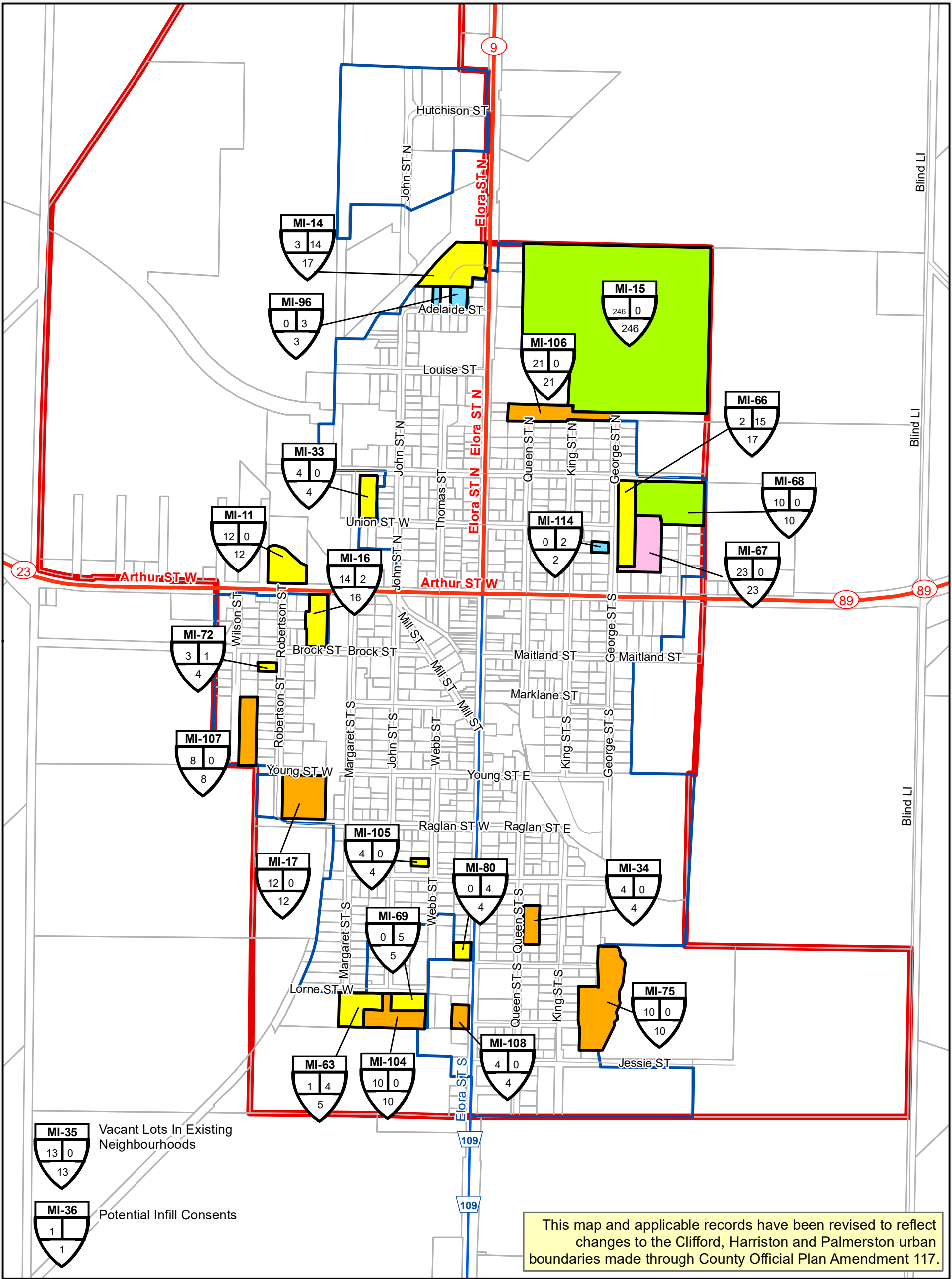
Residential Supply Maps

As of July 1, 2019

MINTO LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

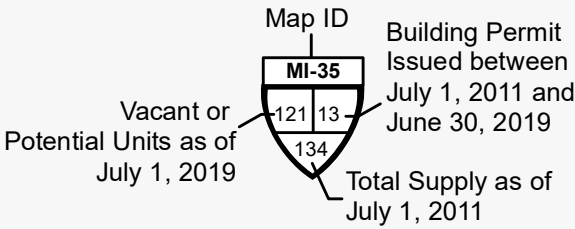
Vacant & Potential Supply					
Area	Registered	Draft Approved or Provisional	Applications Under Review	Vacant Designated	TOTAL UNITS
URBAN CENTRES	139	399	23	626	1187
Clifford	55	0	0	174	229
Harriston	56	256	23	70	405
Palmerston	28	143	0	382	553
OUTSIDE URBAN CENTRES	59	0	0	71	130
Countryside	51	0	0	22	73
Drew	1	0	0	5	6
Rural Estate	7	0	0	15	22
Teviotdale	0	0	0	29	29
MUNICIPAL TOTAL	198	399	23	697	1317

- NOTES:
1. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR).
 2. The figures contained in the table do not include lands designated future development.
 3. These figures have been revised to reflect the changes to the Clifford, Harriston and Palmerston urban boundaries made through OPA 117 which was issued post-July 2019.

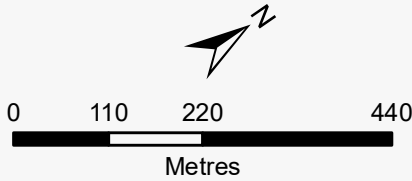


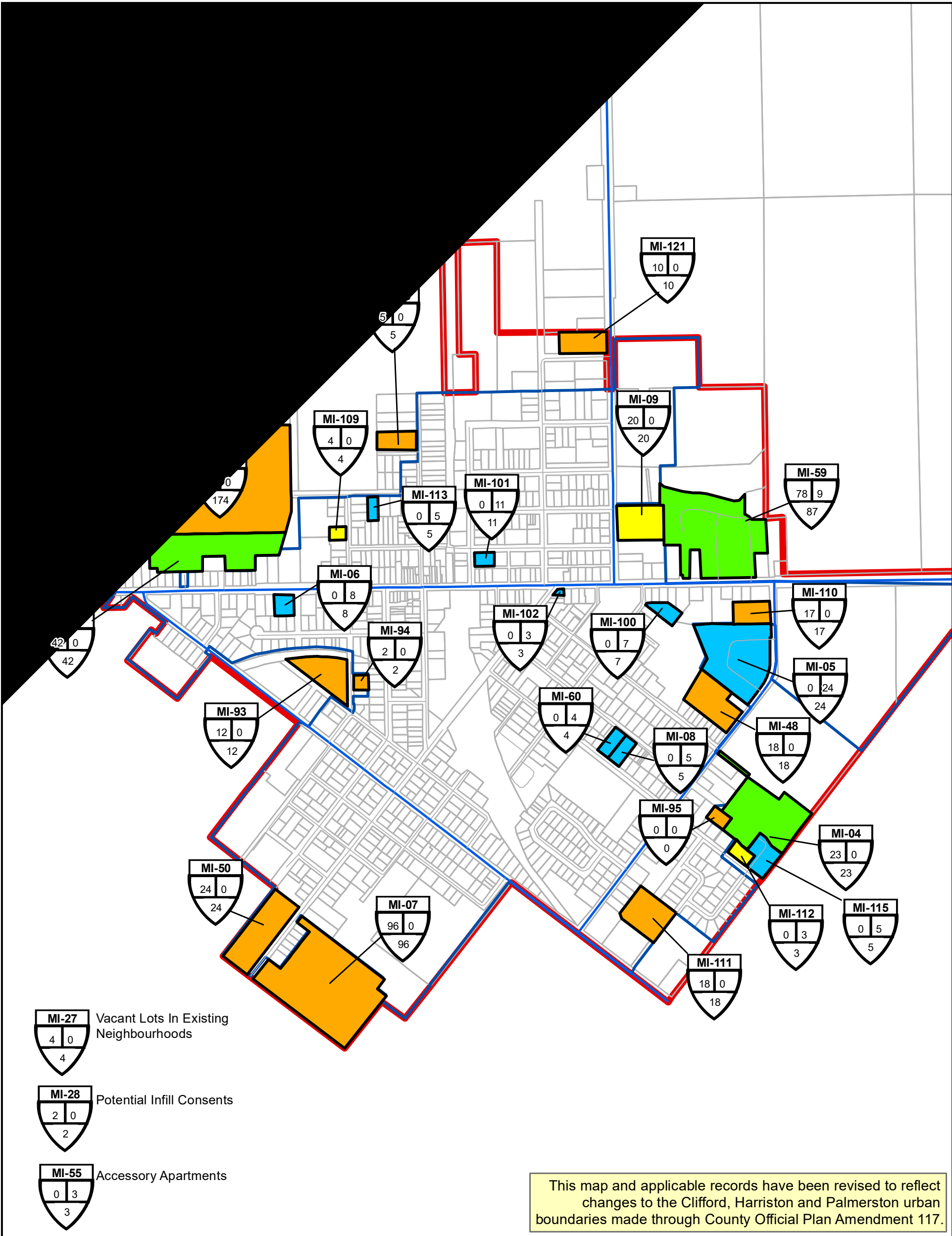
Residential Supply Category

- Vacant Designated
- Application-Under-Review
- Draft-Approved
- Registered
- Built Out Since 2011
- Built Boundary



Harriston
Residential Supply Inventory
with Built Boundary





Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved
- Registered
- Built Out Since July 2011
- Built Boundary

Map ID

MI-35

121 13
134

Vacant or Potential Units as of July 1, 2019

Building Permit Issued between July 1, 2011 and June 30, 2019

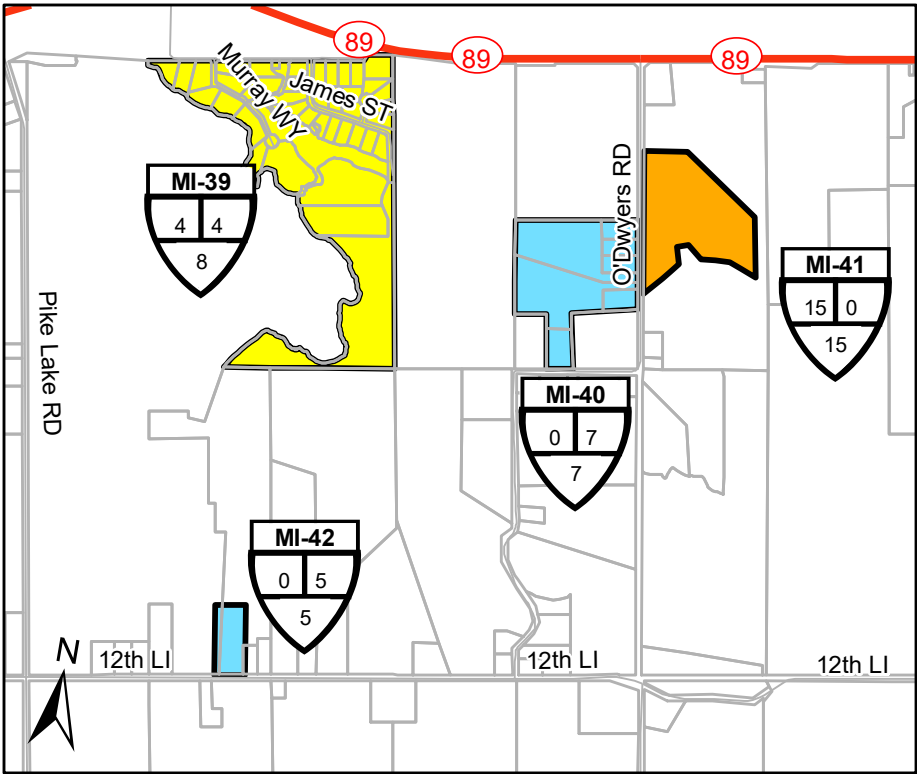
Total Supply as of July 1, 2011

Palmerston Residential Supply Inventory with Built Boundary

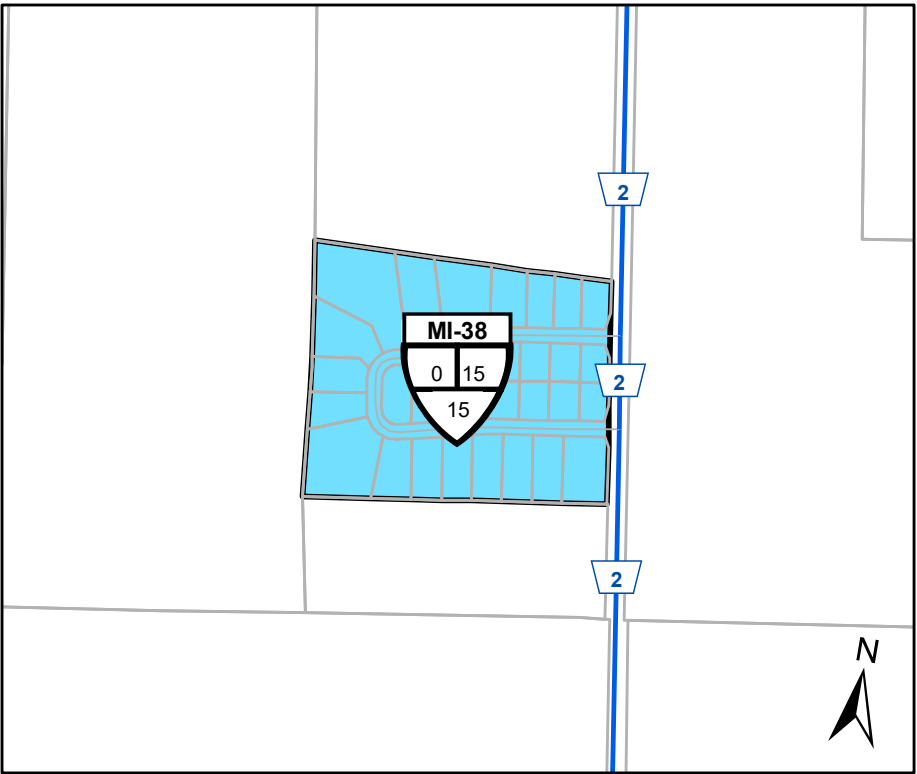
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0 125 250 500

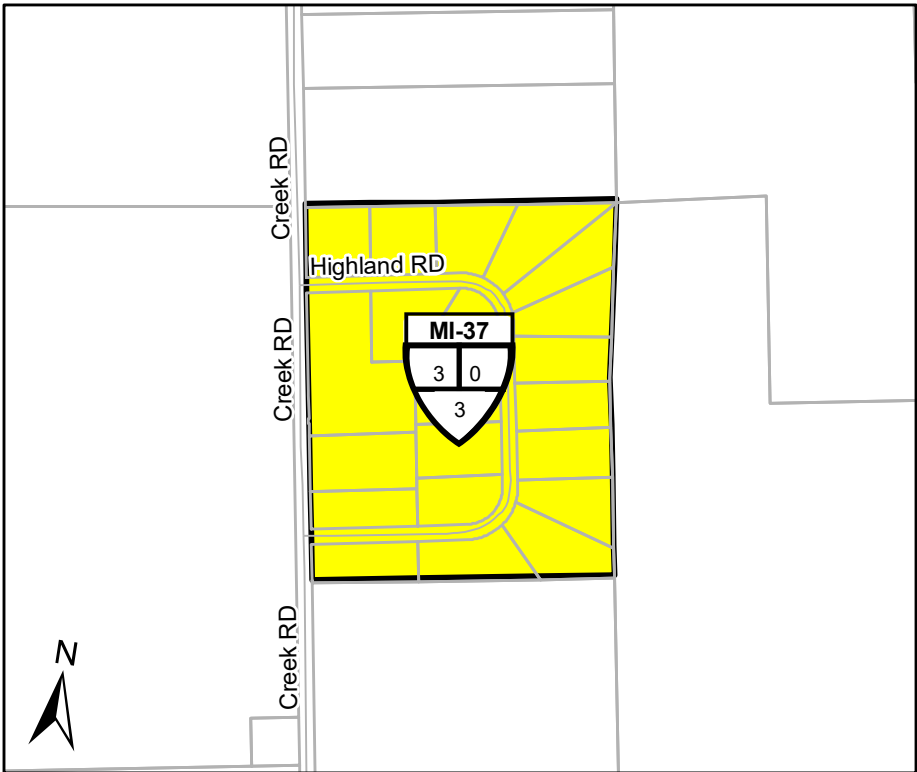
Metres



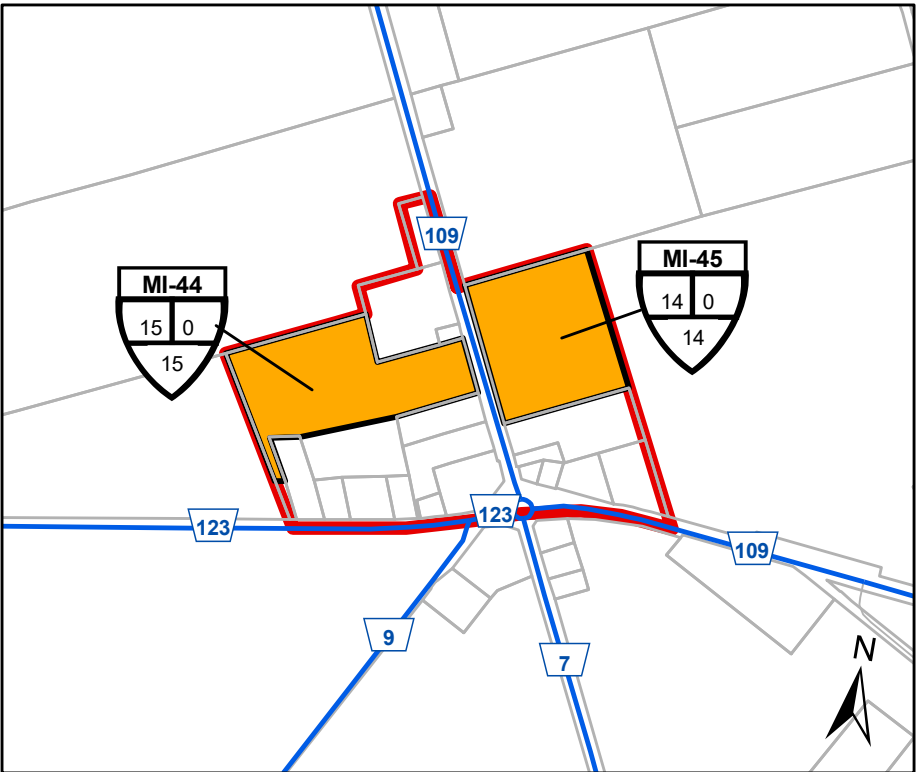
Minto Pines (MI-39), Cherry (MI-40), Thomson (MI-41), Pike Lake Expansion (MI-42)



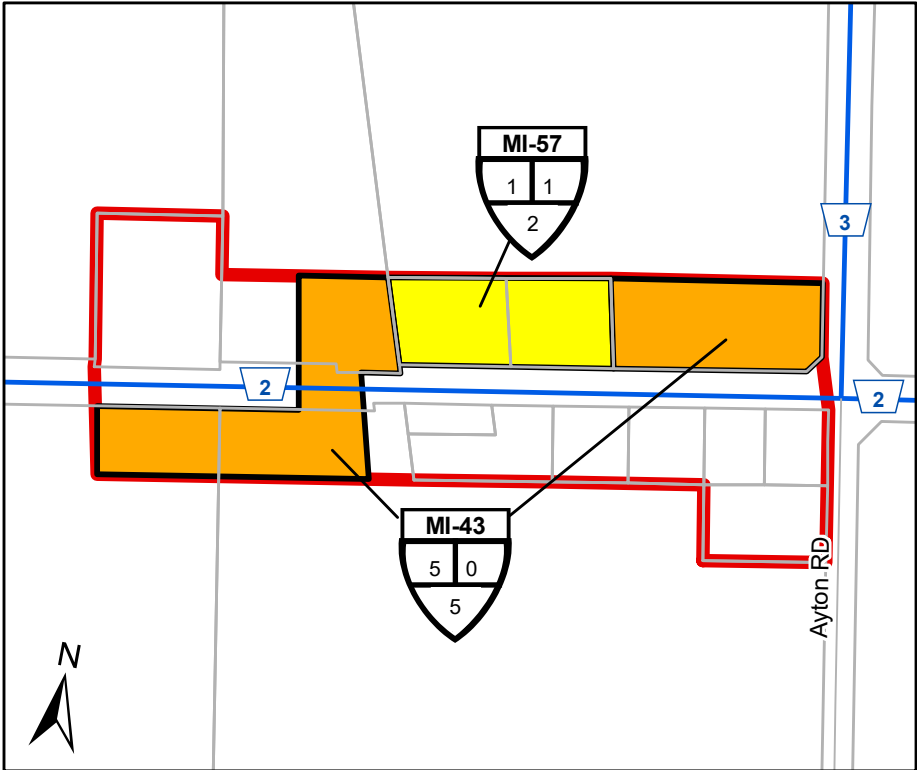
Country Lanes



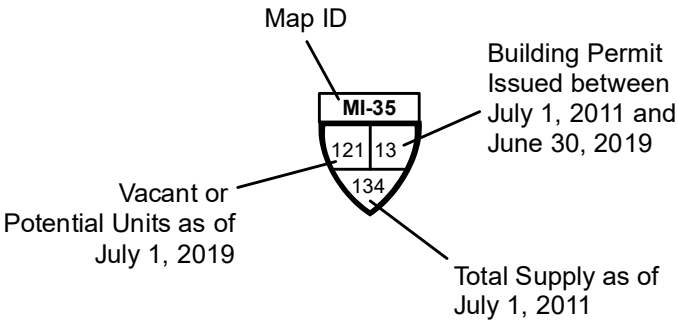
Minto Highlands



Teviodale West (MI-44) and Teviotdale East (MI-45)



Drew (MI-43 & MI-57)



Town of Minto Rural Residential Supply Inventory

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- Built Boundary
- Vacant Designated
- Application Under Review
- Draft Approved or Provisional
- Registered
- Built Out Since 2011

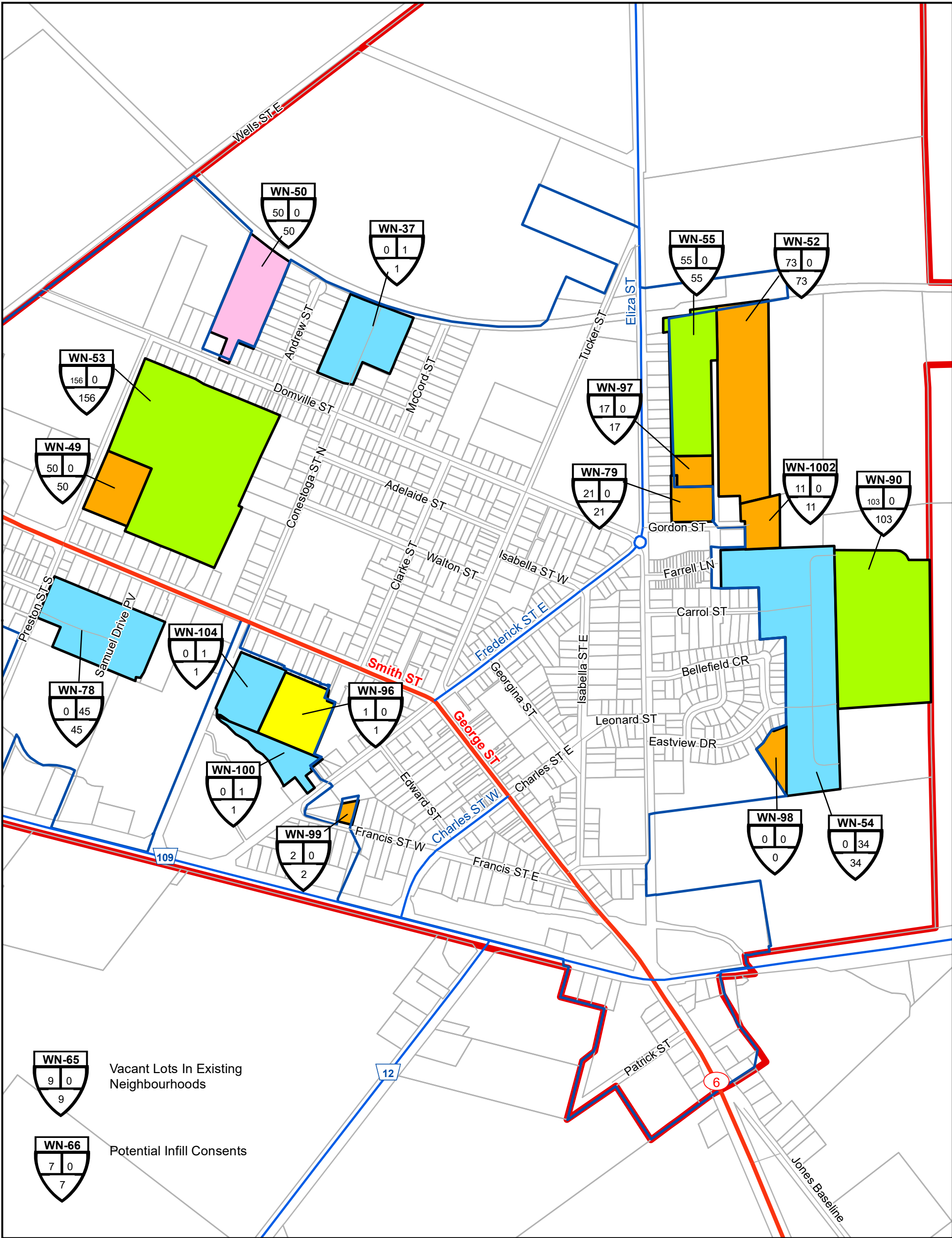
Wellington North Residential Supply Maps

As of July 1, 2019

WELLINGTON NORTH LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

Area	Vacant & Potential Supply				TOTAL UNITS
	Registered	Draft Approved or Provisional	Applications Under Review	Vacant Designated	
URBAN CENTRES	231	850	50	694	1825
Arthur	10	314	50	181	555
Mount Forest	221	536	0	513	1270
OUTSIDE URBAN CENTRES	80	59	0	28	167
Damascus	2	0	0	18	20
Kenilworth	1	19	0	0	20
Lifestyle Community	0	40	0	0	40
Riverstown	0	0	0	10	10
Countryside	73	0	0	0	73
Rural Estate	4	0	0	0	4
MUNICIPAL TOTAL	311	909	50	722	1992

- NOTES:
1. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR)
 2. The figures contained in the table do not include lands designated future development.



Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Map ID

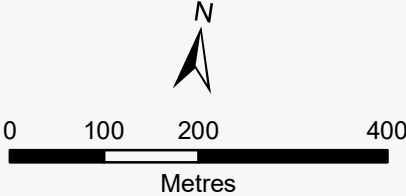
MI-35

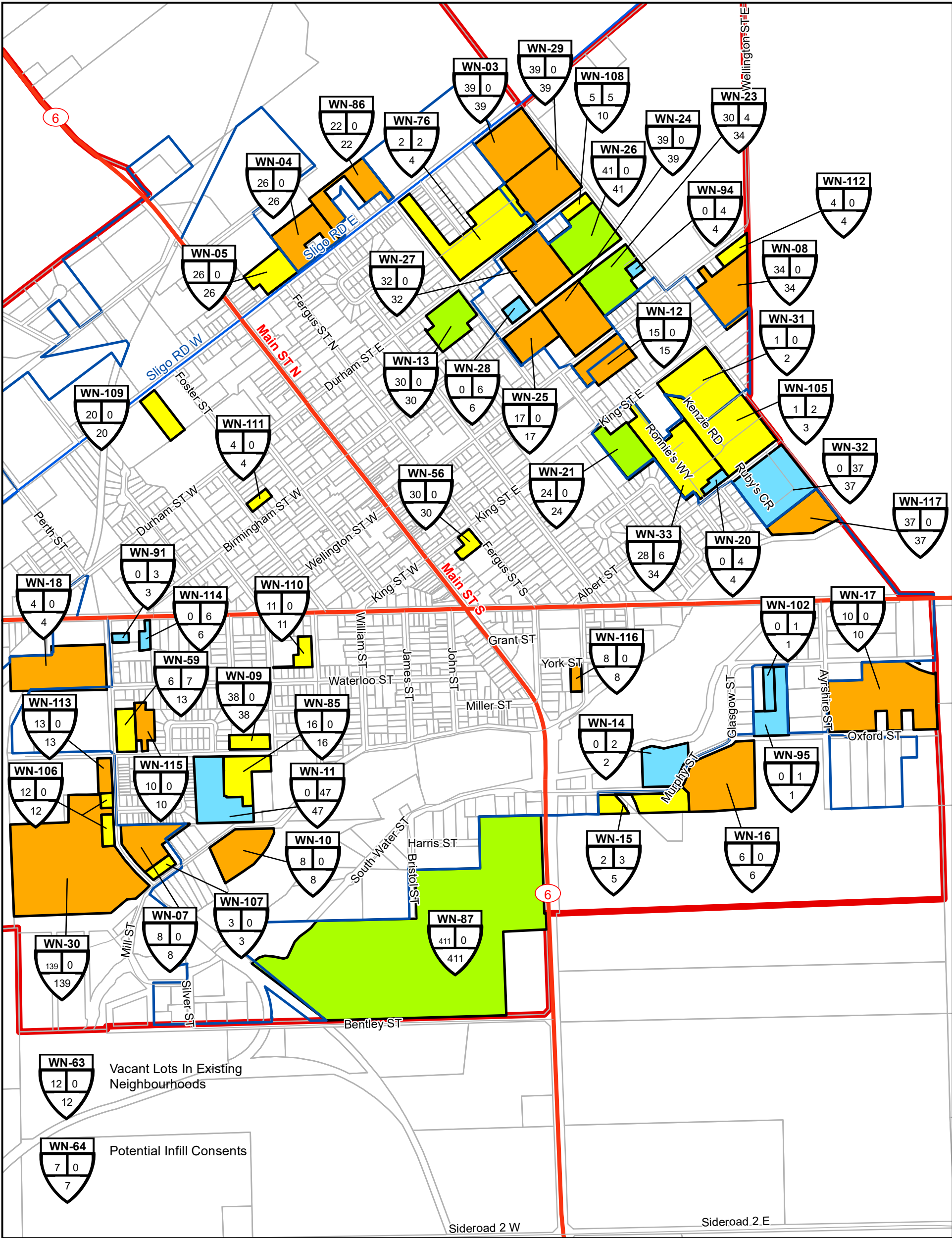
Building Permit Issued between July 1, 2011 and June 30, 2019

Vacant or Potential Units as of July 1, 2019

Total Supply as of July 1, 2011

Arthur
Residential Supply Inventory
with Built Boundary





Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Map ID

MI-35

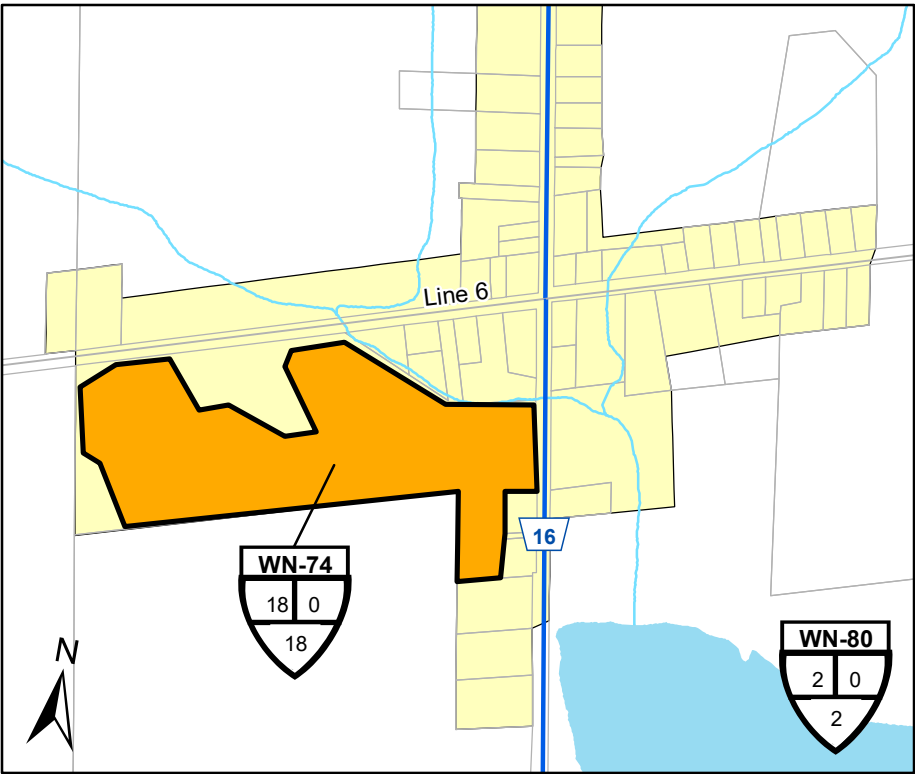
Building Permit Issued between July 1, 2011 and June 30, 2016

Total Supply as of July 1, 2011

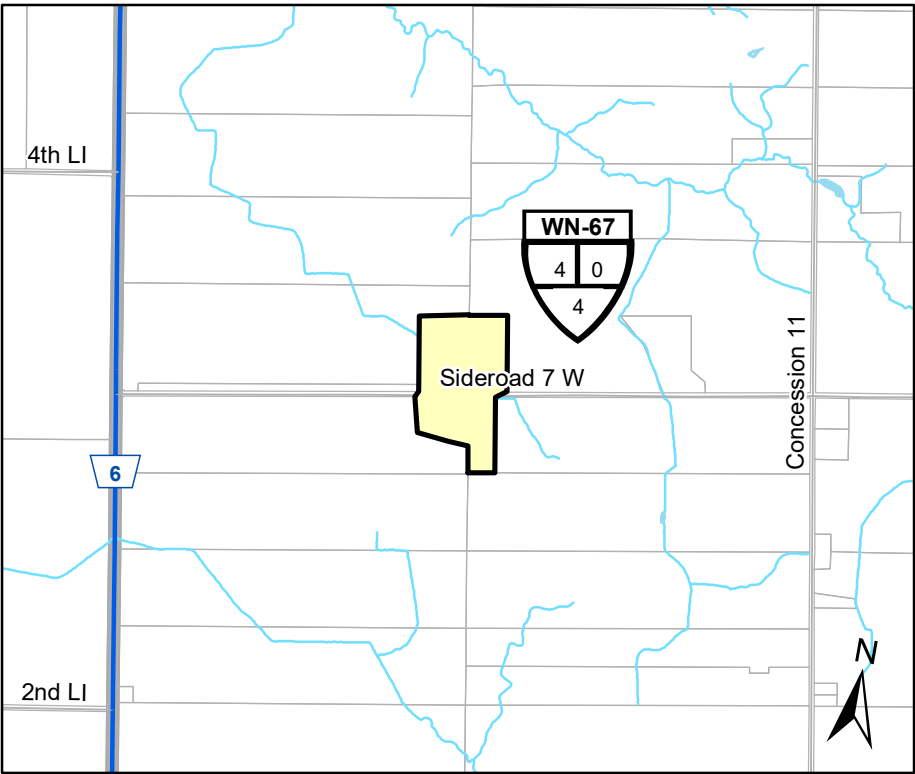
Vacant or Potential Units as of July 1, 2016

Mount Forest Residential Supply Inventory with Built Boundary

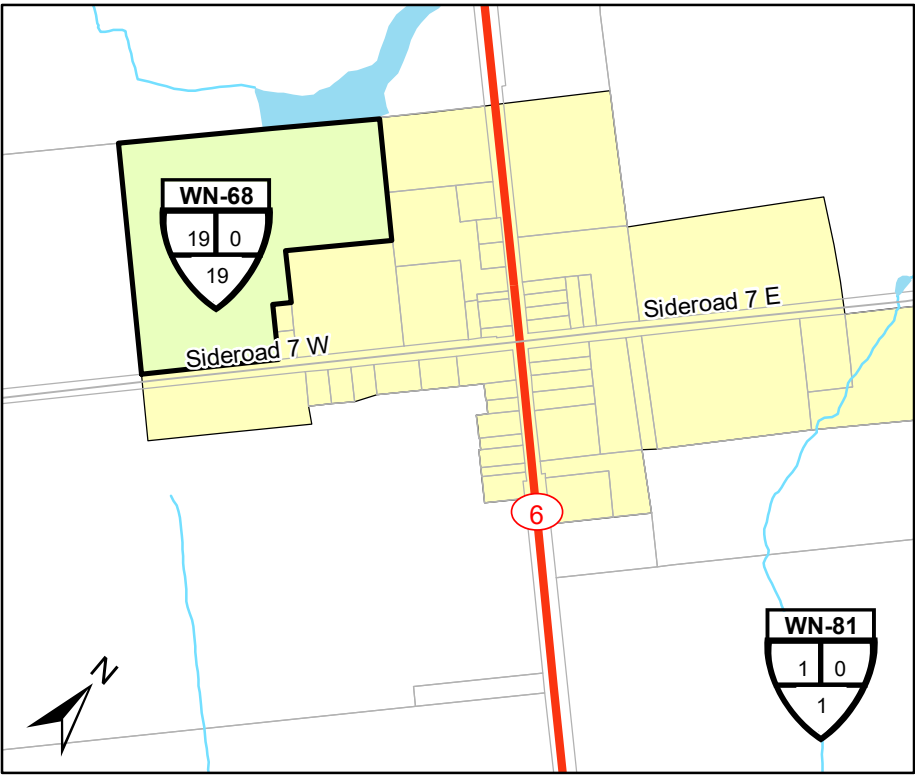
0 137.5 275 550 Metres



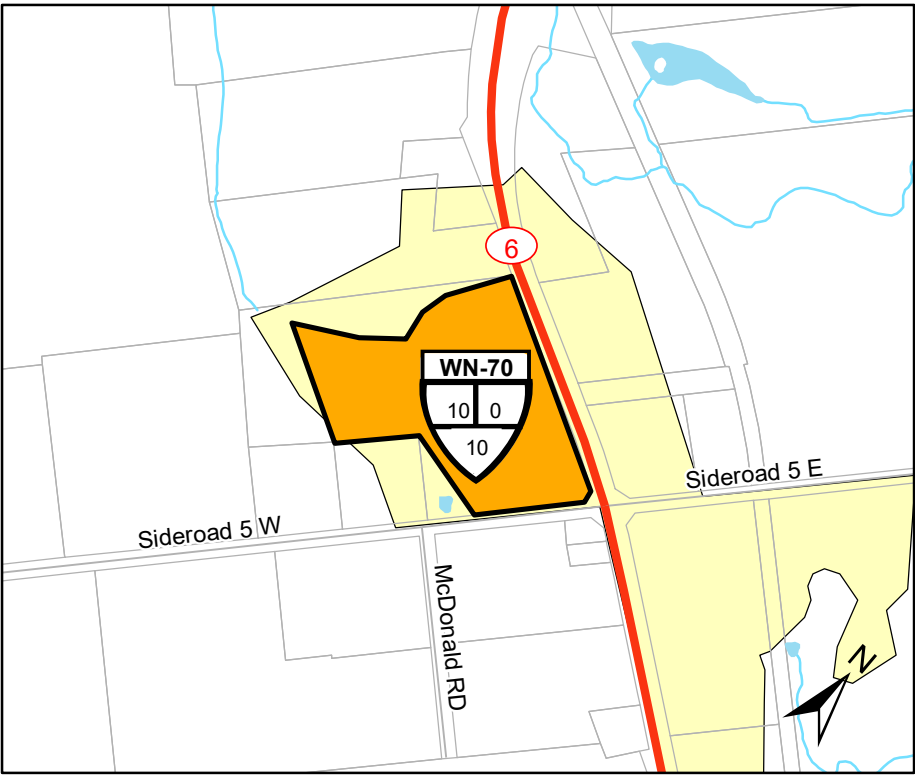
Damascus - Giles (WN-74) and Damascus Infilling (WN-80)



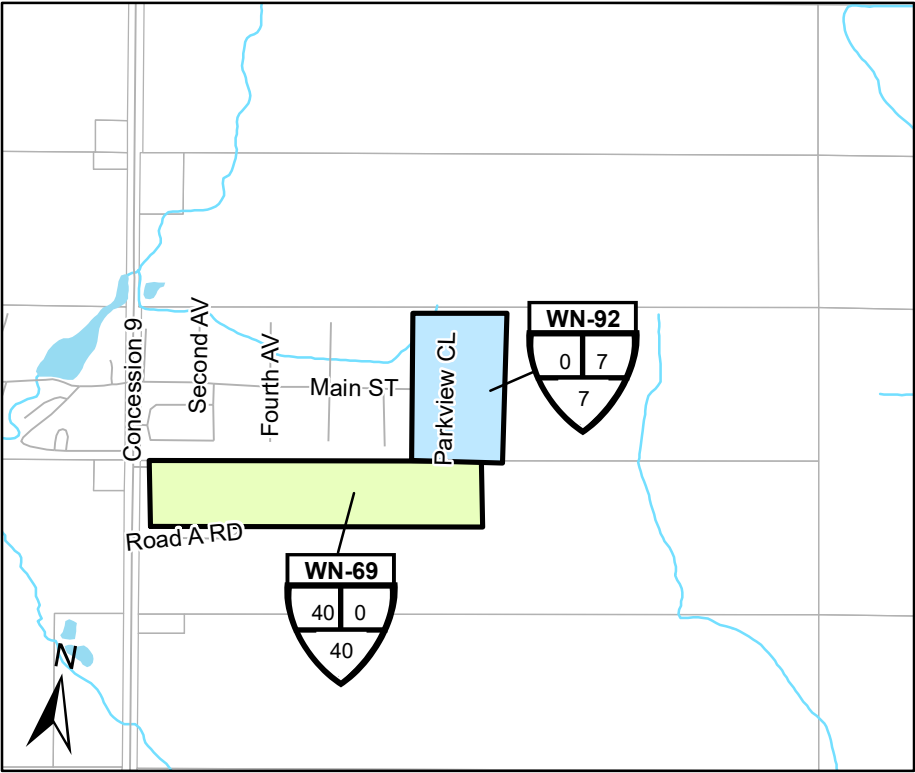
Rural Cluster on SR7



Glad-Pat (WN-68), Kenilworth Vacant Lots (WN-81)



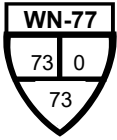
Riverstown



Conestoga Estates (WN-92) and Wellington Acres (WN-69)



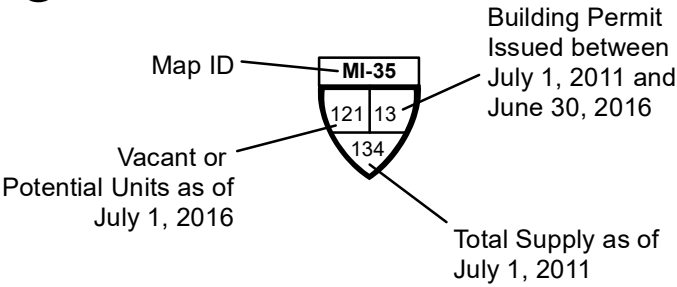
Potential Infill Consents



Vacant Lots In Existing Neighbourhoods

Township of Wellington North Rural Residential Supply Inventory

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Building Permit Issued between July 1, 2011 and June 30, 2016

- Residential Supply**
- Vacant Designated
 - Application under review
 - Draft Approved or Provisional
 - Registered
 - Built Out Since July 2011

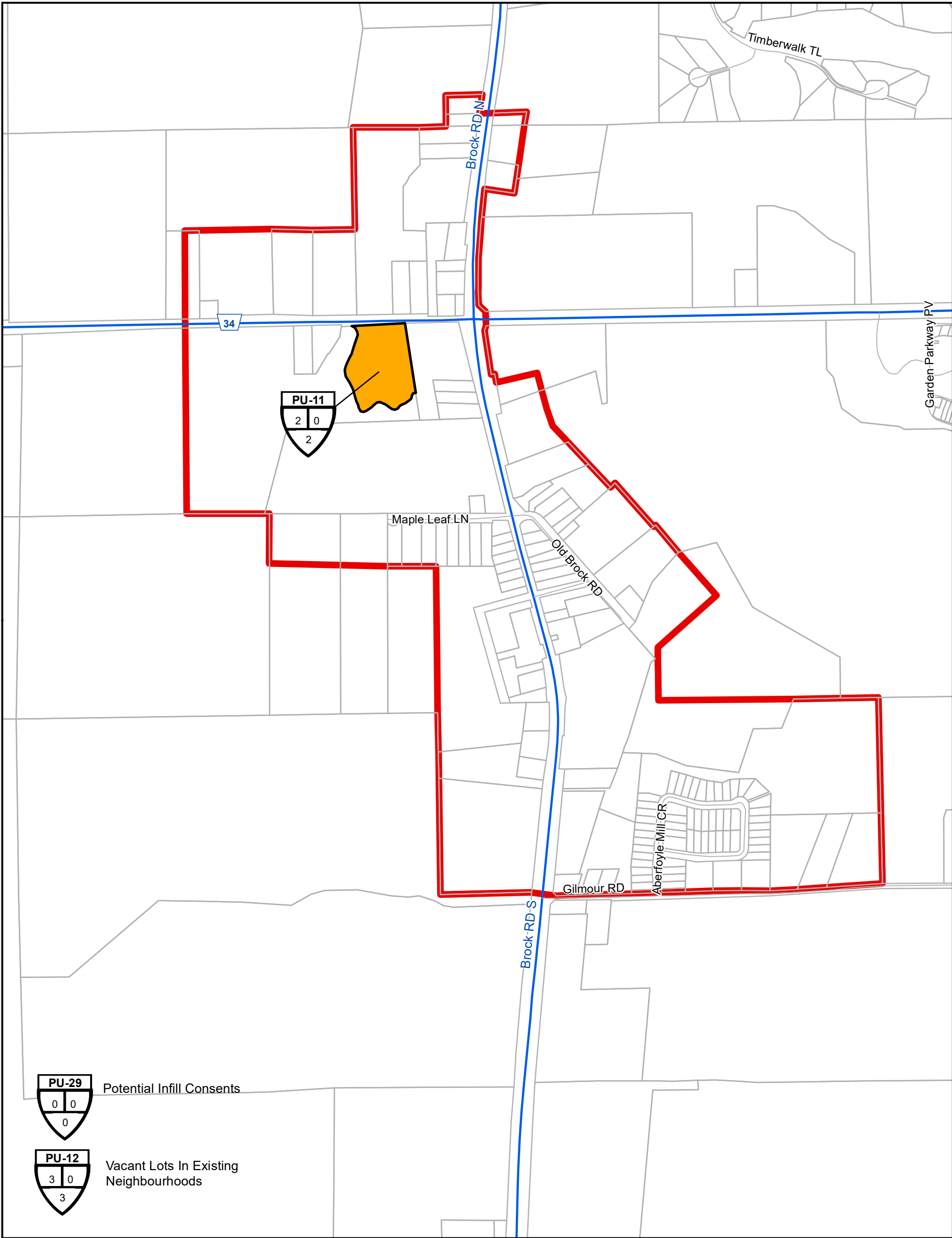
Puslinch Residential Supply Maps

As of July 1, 2019

PUSLINCH LAND BUDGET
LONG TERM RESIDENTIAL UNIT SUPPLY By Category (as of July 2019)

	Vacant & Potential Supply				
Area	Registered	Draft Approved or Provisional	Applications Under Review	Vacant Designated	TOTAL UNITS
URBAN CENTRES	16	0	0	33	49
Aberfoyle	3	0	0	2	5
Morrison	13	0	0	31	44
OUTSIDE URBAN CENTRES	229	0	0	153	382
Arkell	3	0	0	0	3
Countryside	116	0	0	153	269
Lifestyle Community	71	0	0	0	71
Rural Estate	39	0	0	0	39
MUNICIPAL TOTAL	245	0	0	186	431

- NOTES:
1. The figures contained in the table and maps are subject to change during the Municipal Comprehensive Review (MCR).
 2. The figures contained in the table do not include lands designated future development.



Residential Supply Category

- Vacant Designated
- Application Under Review
- Draft Approved Or Provisional
- Registered
- Built Out Since 2011
- Built Boundary

Map ID

MI-35

121

13

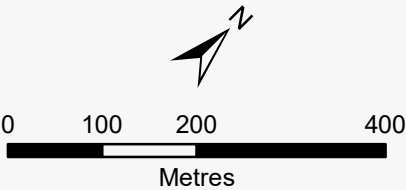
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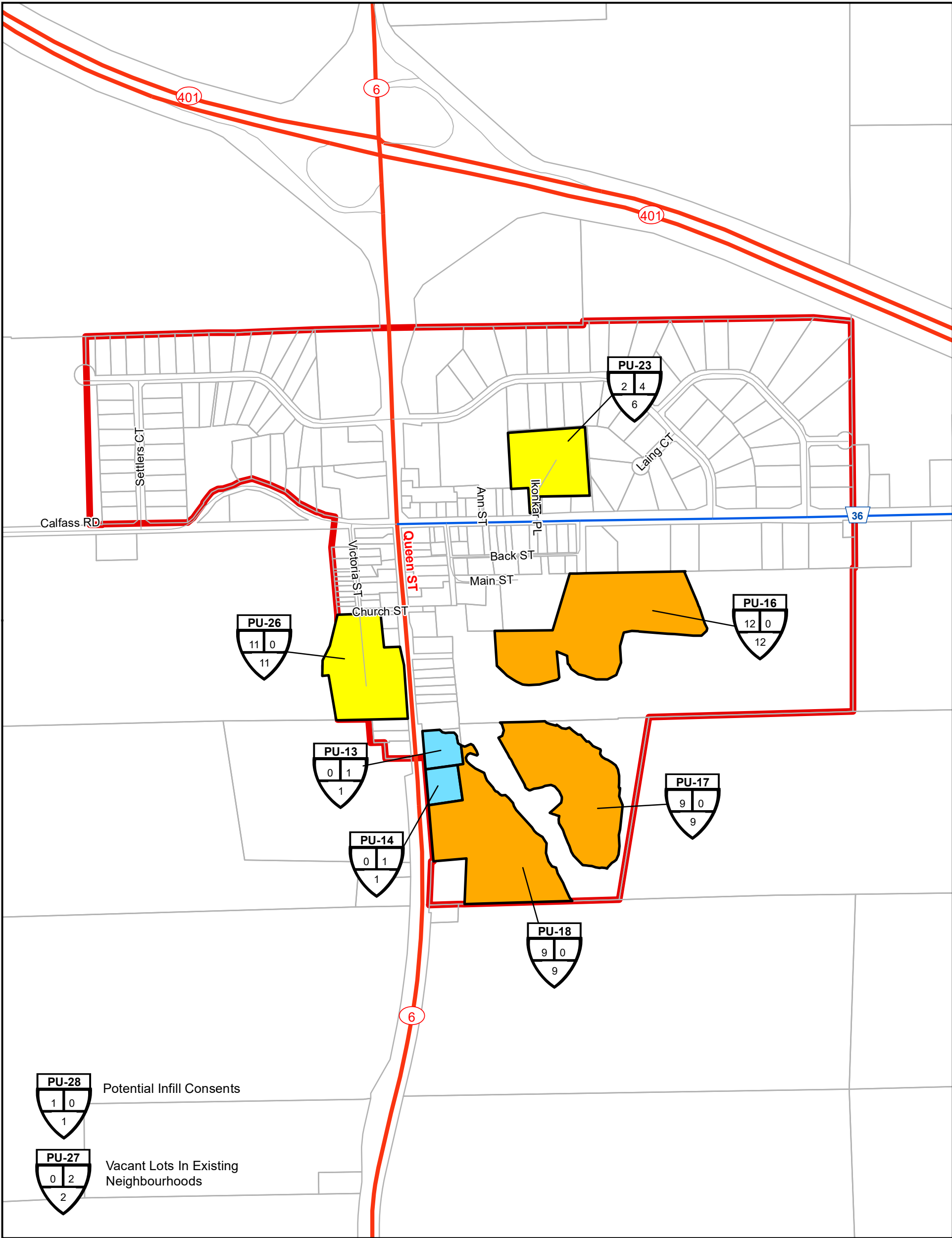
Vacant or Potential Units as of July 1, 2019

Building Permit Issued between July 1, 2011 and June 30, 2019

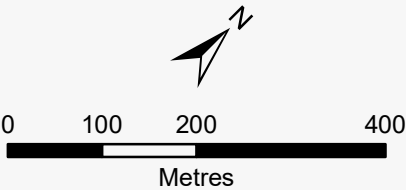
Total Supply as of July 1, 2011

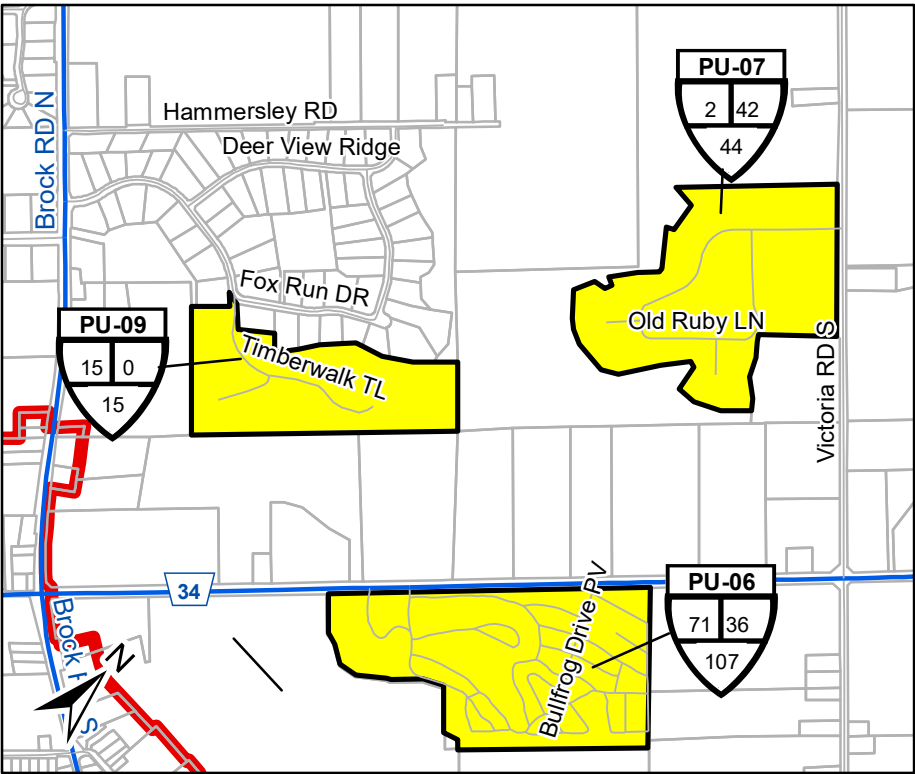
Aberfoyle Residential Supply Inventory with Built Boundary



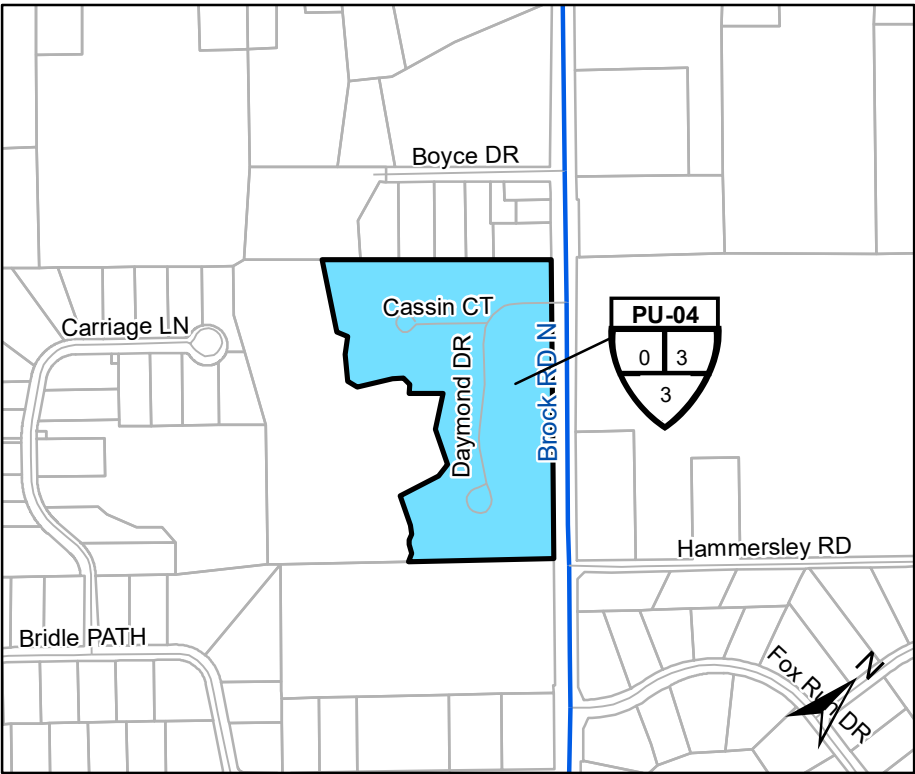


Morriston Residential Supply Inventory with Built Boundary

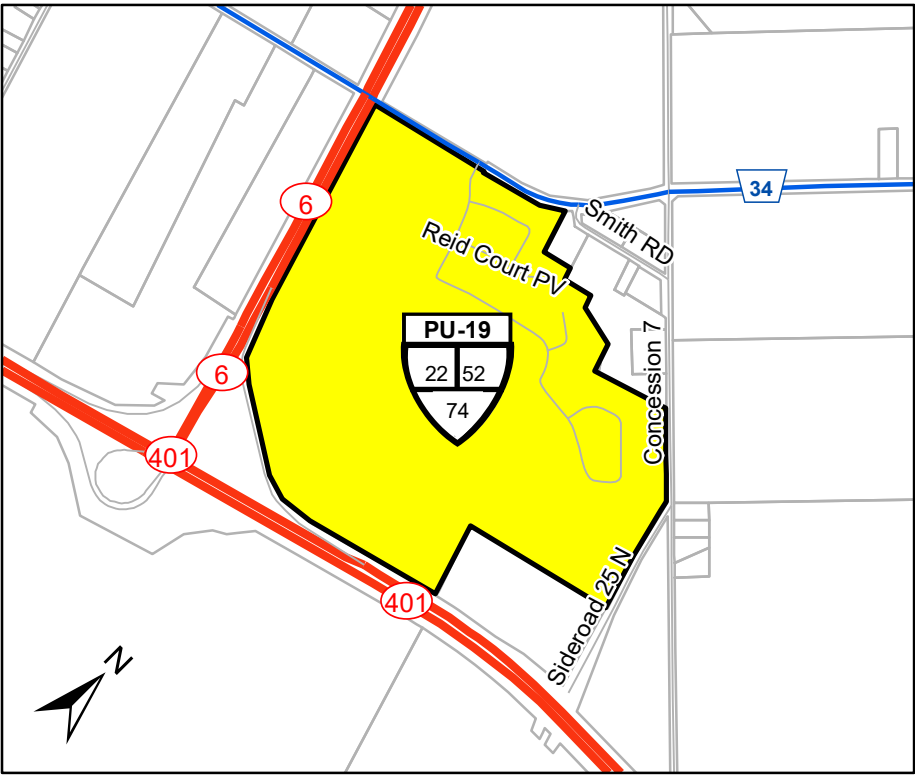




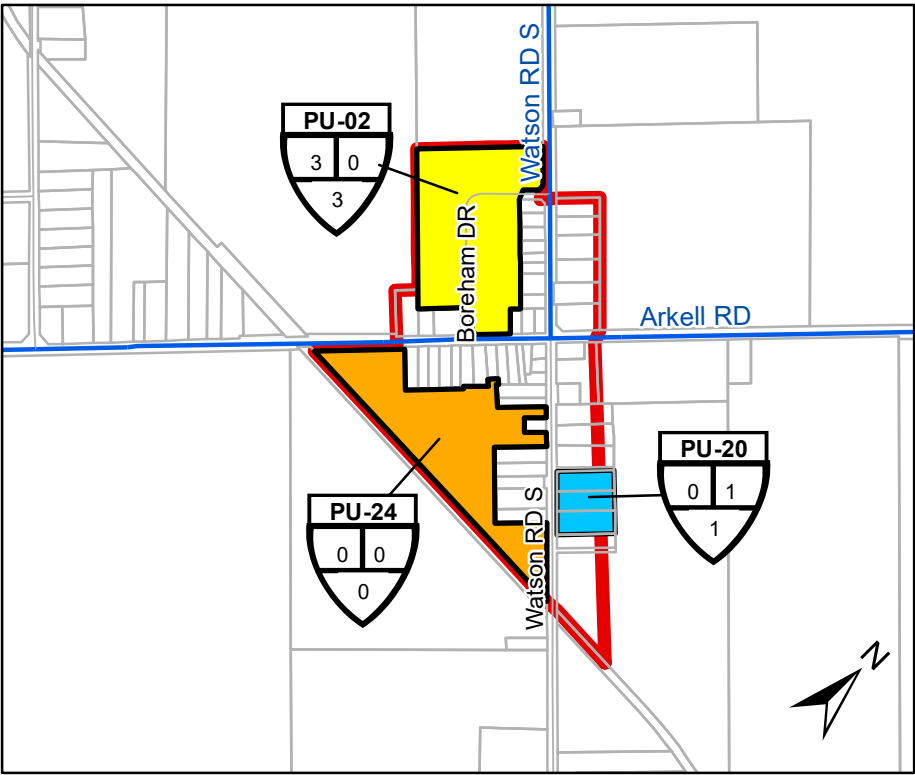
Audrey Meadows (PU-07), Mini Lakes (PU-06), Fox Run Phase 2(PU-09)



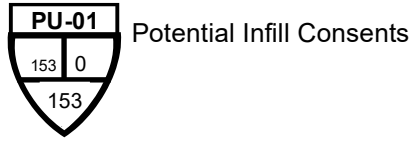
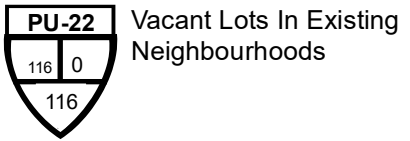
Aberfoyle Creek Phase 3



Heritage Lake

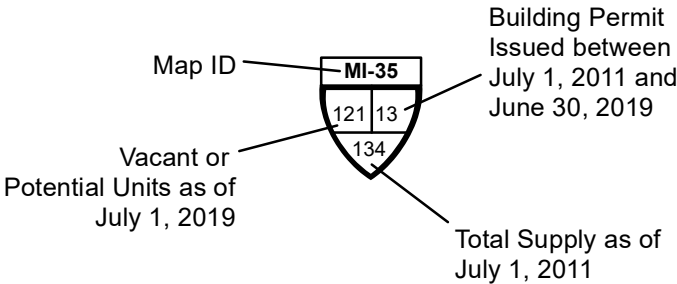


Arkell Estates (PU-02), Arkell - Guthrie (PU-24) and Kukovica Potential Severances (PU-20)



Township of Puslinch Rural Residential Supply Inventory

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Residential Supply Category

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- Registered
- Built Out Since 2011
- Built Boundary



Appendix C

Designated Greenfield Area Land Supply



Appendix C: D.G.A. Land Supply

Figure C-1
County of Wellington
D.G.A. Developed Lands as of Mid-2019 by Area Municipality

Area Municipality	Population	Housing Units	Land Area, ha	Jobs	People and Jobs	People and Jobs Density	Units Per Gross Ha
Centre Wellington	4,400	1,600	112	220	4,620	41	14
Guelph-Eramosa	1,450	530	47	170	1,620	34	11
Mapleton	410	170	15	20	430	28	11
Minto	400	160	14	30	430	31	11
Wellington North	600	160	22	30	630	29	7
Erin	50	20	7	0	50	8	3
Total County	7,300	2,640	216	470	7,800	36	12

Figure C-2
County of Wellington
D.G.A. Developed Lands as of Mid-2019 by Urban Centre

Urban Centre	Population	Housing Units	Land Area, ha	Jobs	People and Jobs	People and Jobs Density
Fergus	3,200	1,197	80	160	3,360	42
Elora	1,200	407	32	60	1,260	40
Rockwood	1,450	528	47	170	1,620	34
Drayton	400	165	15	20	420	28
Moorefield	10	4	0.3	0	10	33
Palmerston	200	77	7	10	210	30
Clifford	100	45	4	10	110	28
Harriston	100	37	3	10	110	37
Arthur	200	34	8	10	210	28
Mount Forest	400	124	14	20	420	30
Erin Village	30	10	1	0	30	30
Hillsburgh	20	5	6	0	20	4
Total	7,300	2,640	216	470	7,800	36

Note: May not add up precisely due to rounding. Due to sparse development and recreational lands in the Town of Erin, the density is low.

Source: Watson & Associates Economists Ltd. Based on County of Wellington residential building permit activity and parcel fabric. Sites identified as developed based on building permit data and aerial imagery. Recreational, internal infrastructure and commercial/institutional development included in land area.



Figure C-3
County of Wellington
D.G.A. Land Supply, Land Area, Gross ha as of 2019

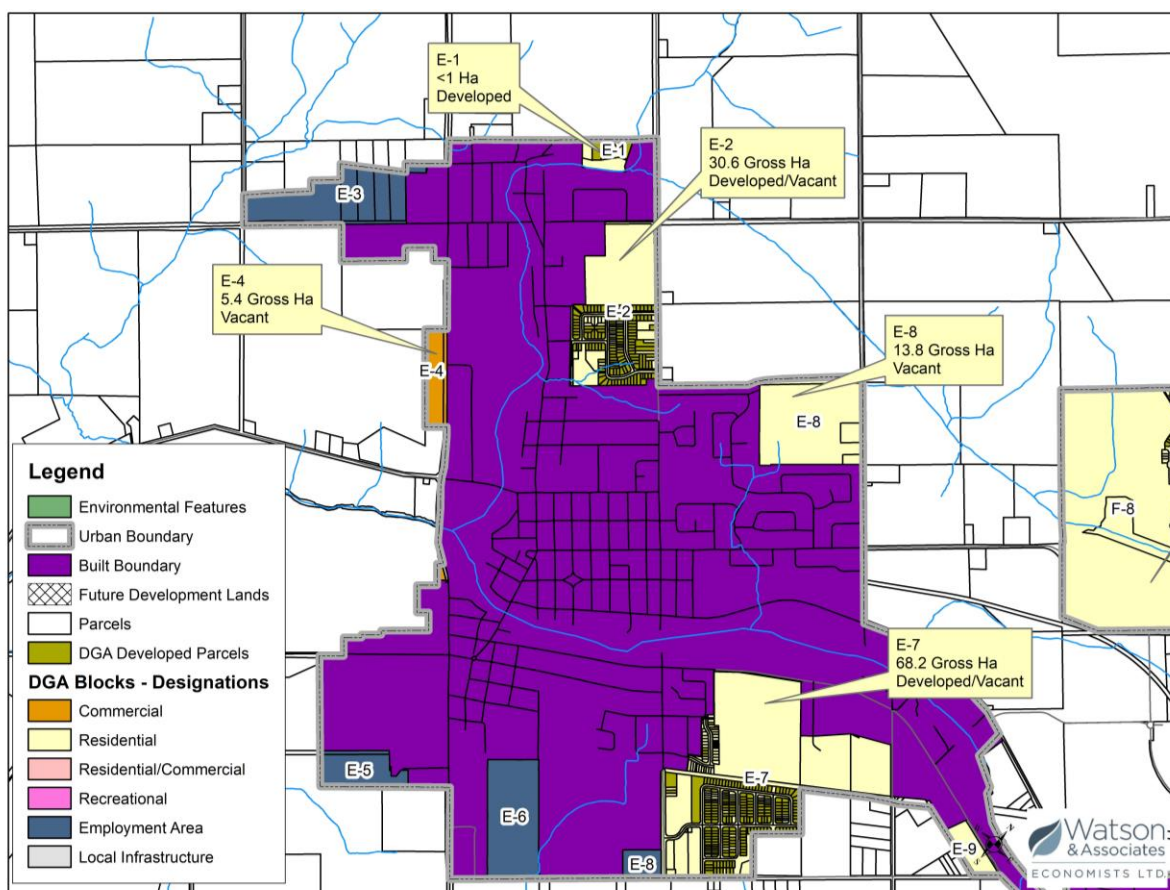
Area Municipality	Developed Designated	Vacant Designated	Total Designated	Future Development	Total D.G.A.
Centre Wellington	112	306	417	0	417
Erin	7	268	275	38	313
Wellington North	22	128	149	170	319
Minto	14	98	112	61	173
Mapleton	15	79	94	15	110
Guelph-Eramosa	47	13	60	0	60
Total	216	886	1,107	284	1,392

Source: Watson & Associates Economists Ltd.

The following maps provide details of the D.G.A. lands supply at the Urban Centre level.



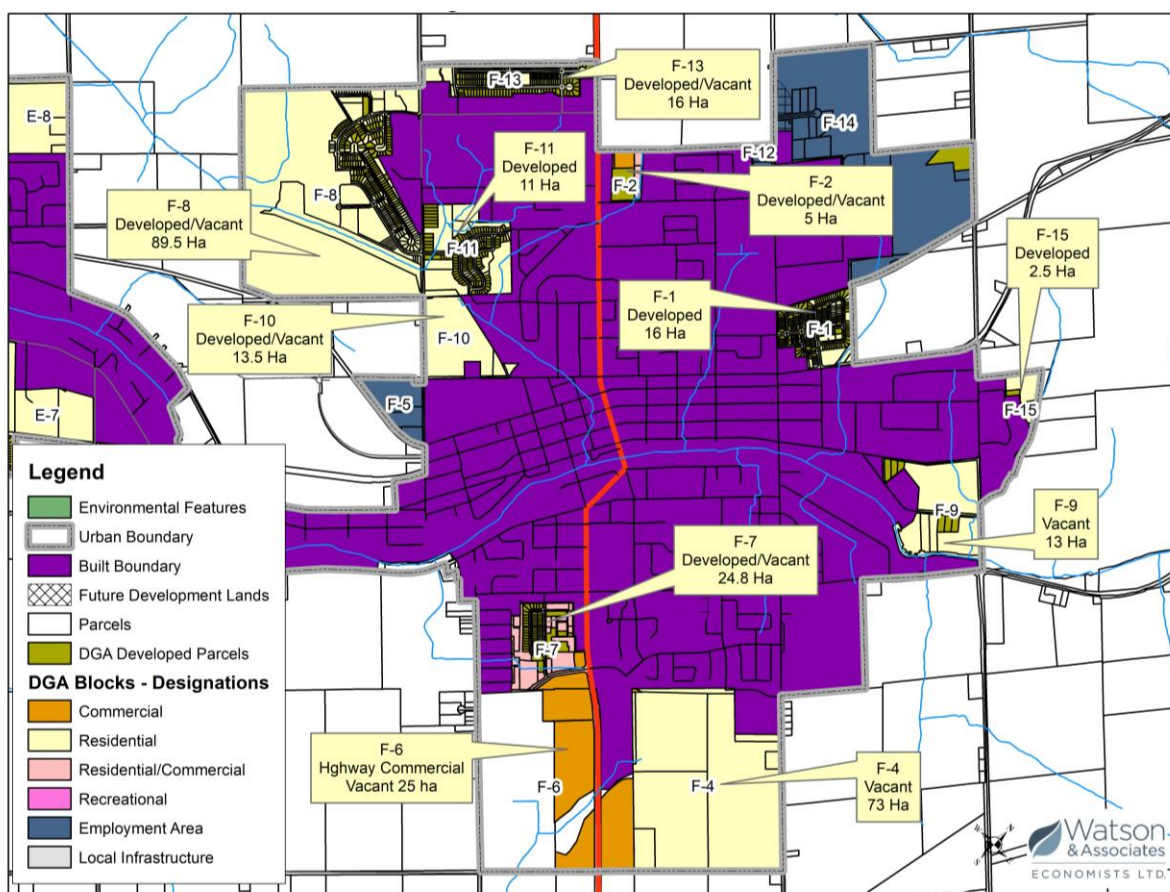
Figure C-4
County of Wellington
Elora Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 123 Gross ha
Future Development in D.G.A. = 0
Note: Employment Area excluded in D.G.A. land area.



Figure C-5
County of Wellington
Fergus Urban Centre
D.G.A. Land Supply



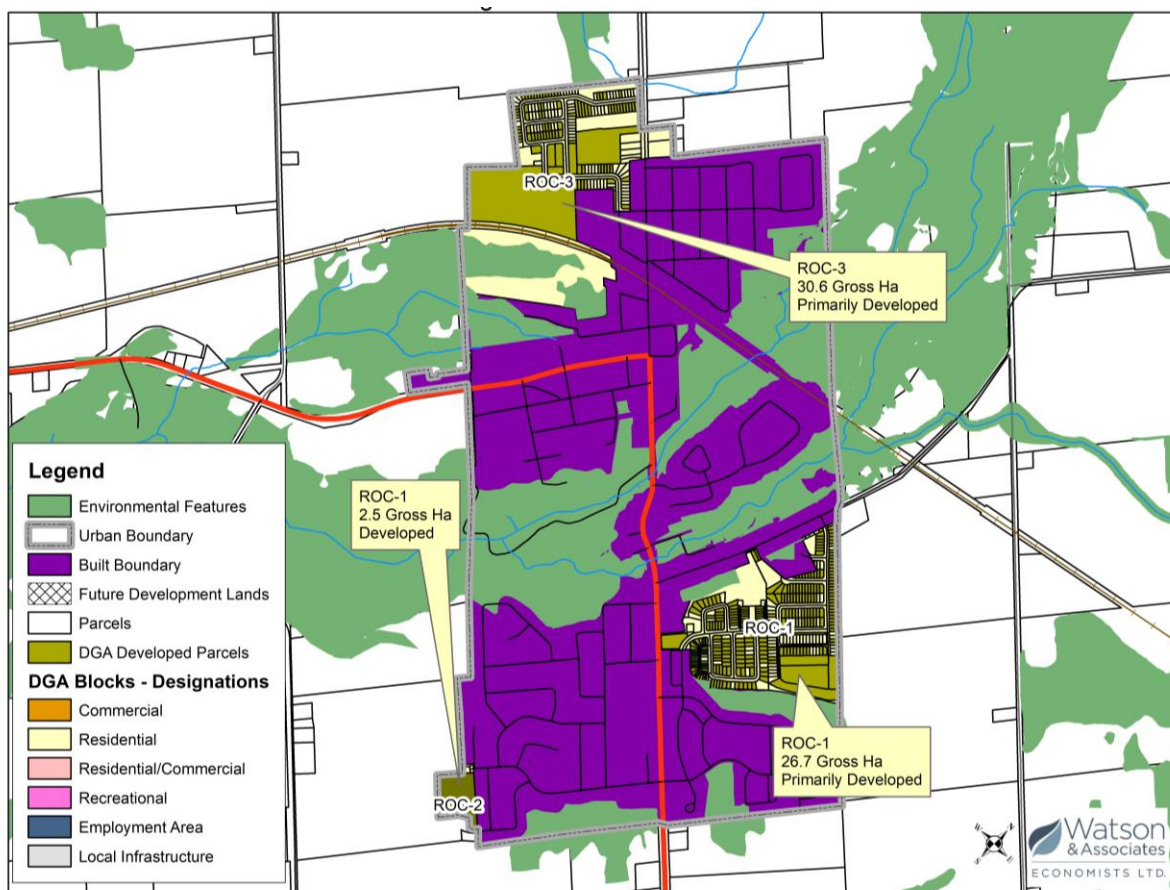
D.G.A. Land Area = 295 Gross ha (note South Fergus Secondary Plan included)

Future Development in D.G.A. = 2 Gross ha

Note: Employment Area excluded in D.G.A. land area.



Figure C-6
County of Wellington
Rockwood Urban Centre
D.G.A. Land Supply



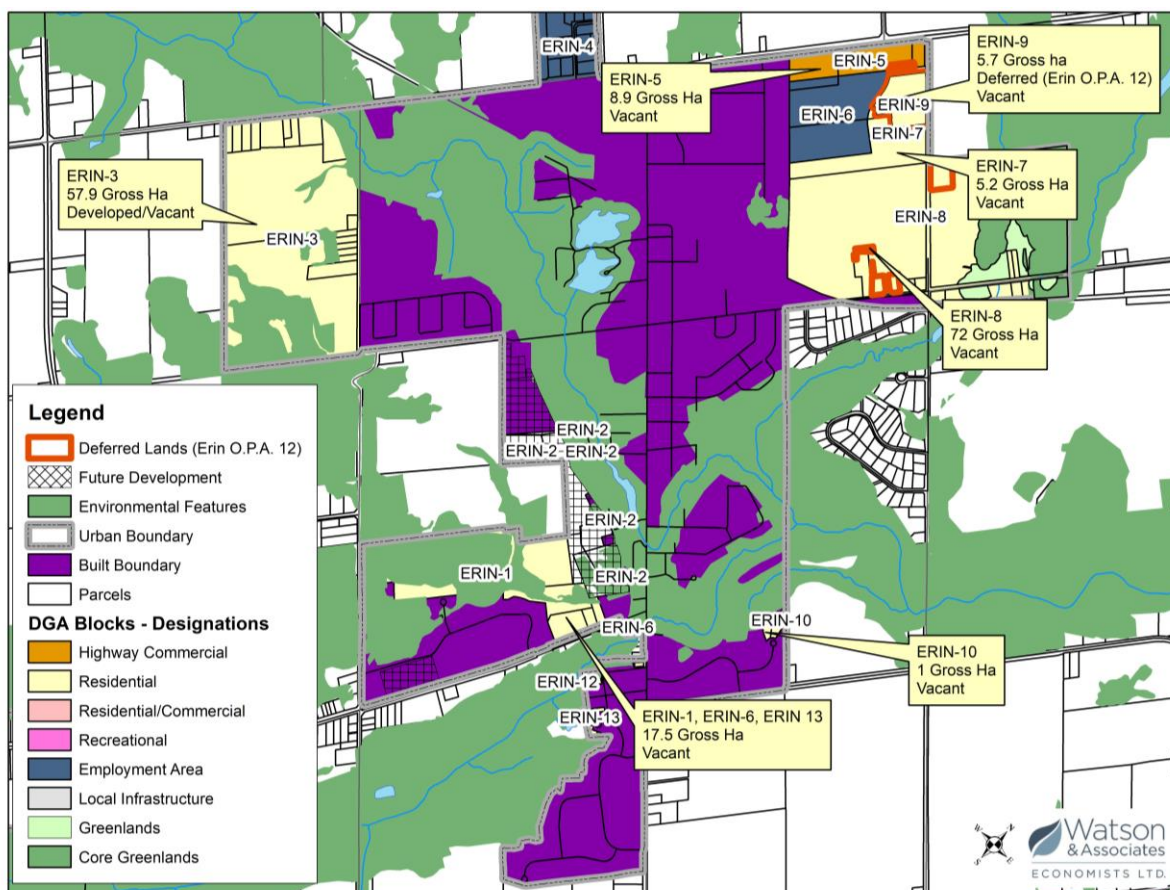
D.G.A. Land Area = 60 Gross ha

Future Development in D.G.A. = 0

Note: Employment Area excluded in D.G.A. land area.



Figure C-7
County of Wellington
Erin Village Urban Centre
D.G.A. Land Supply



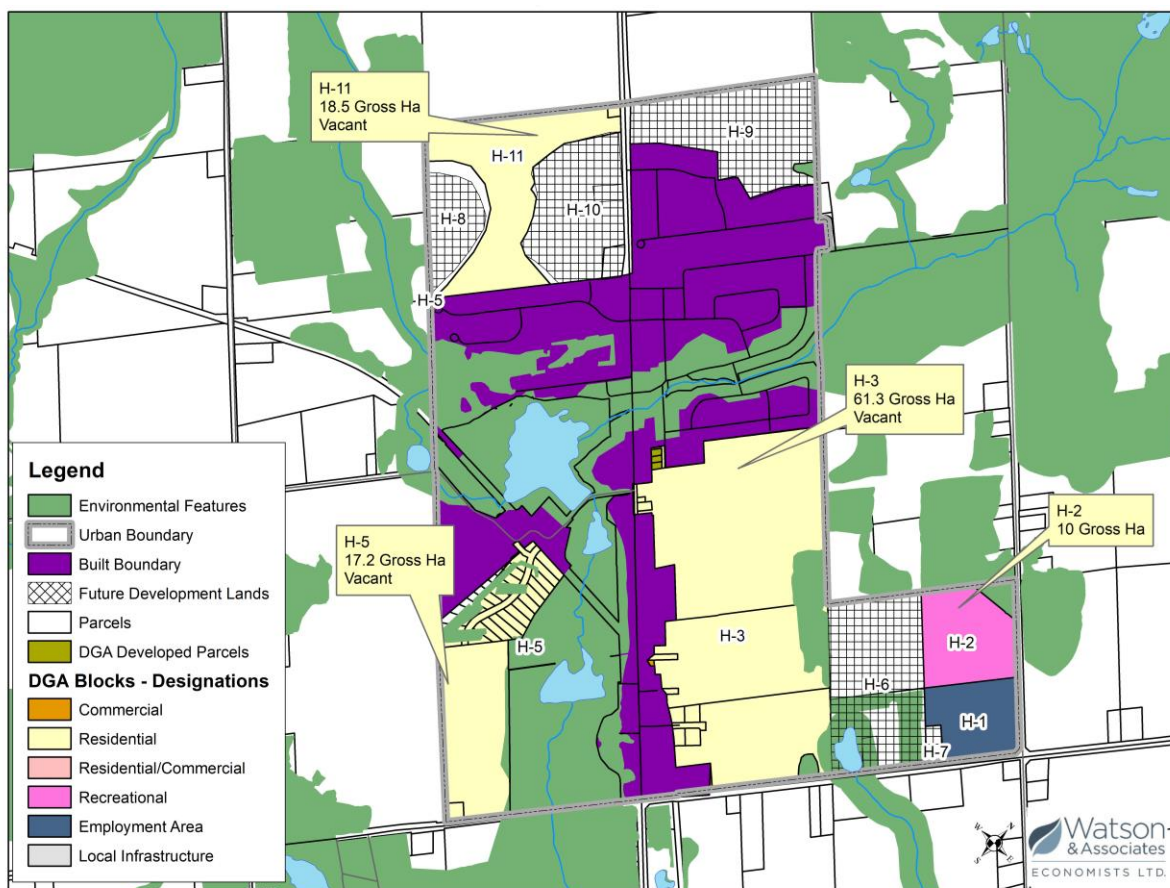
D.G.A. Land Area = 168 Gross ha (includes Erin O.P.A. 12 deferred lands)

Future Development in D.G.A. = 0 ha

Note: Employment Area excluded in D.G.A. land area.



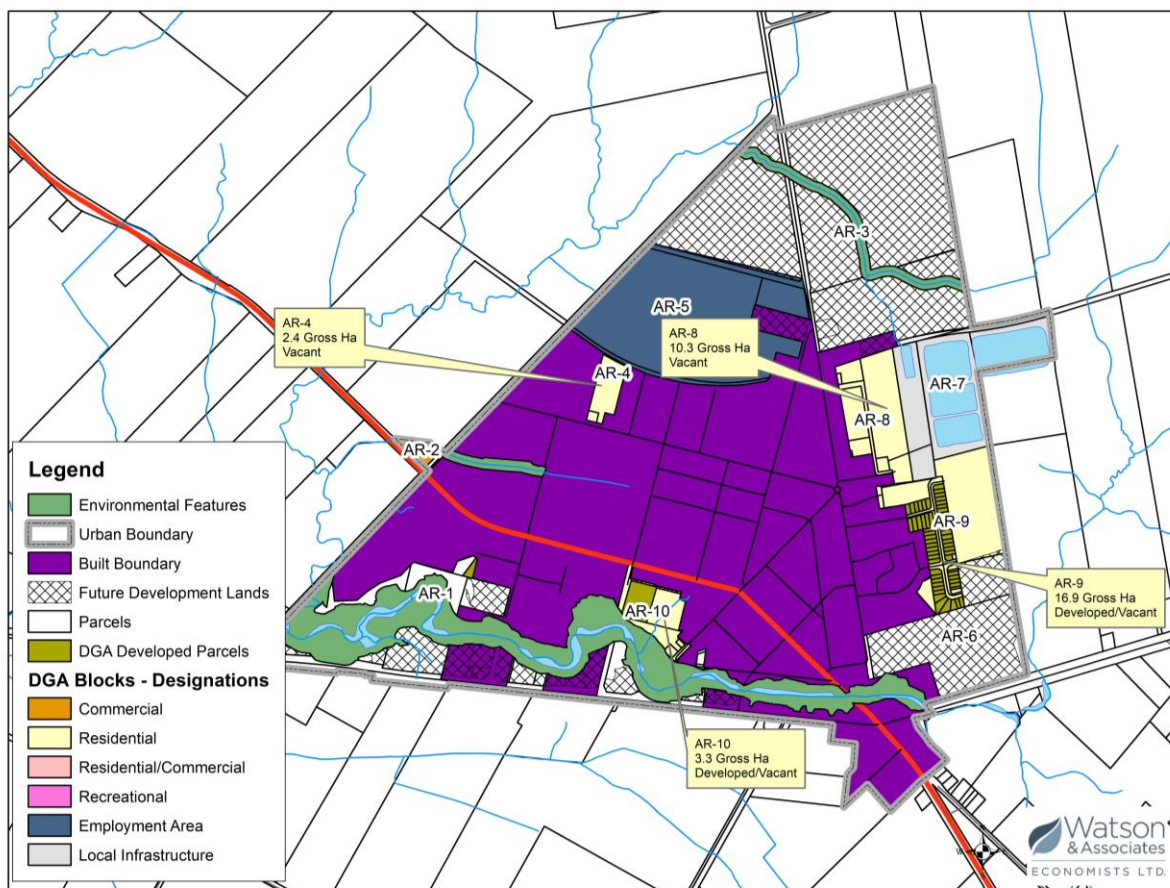
Figure C-8
County of Wellington
Hillsburgh Village Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 107 Gross ha
Future Development in D.G.A. = 38 Gross ha
Note: Employment Area excluded in D.G.A. land area.



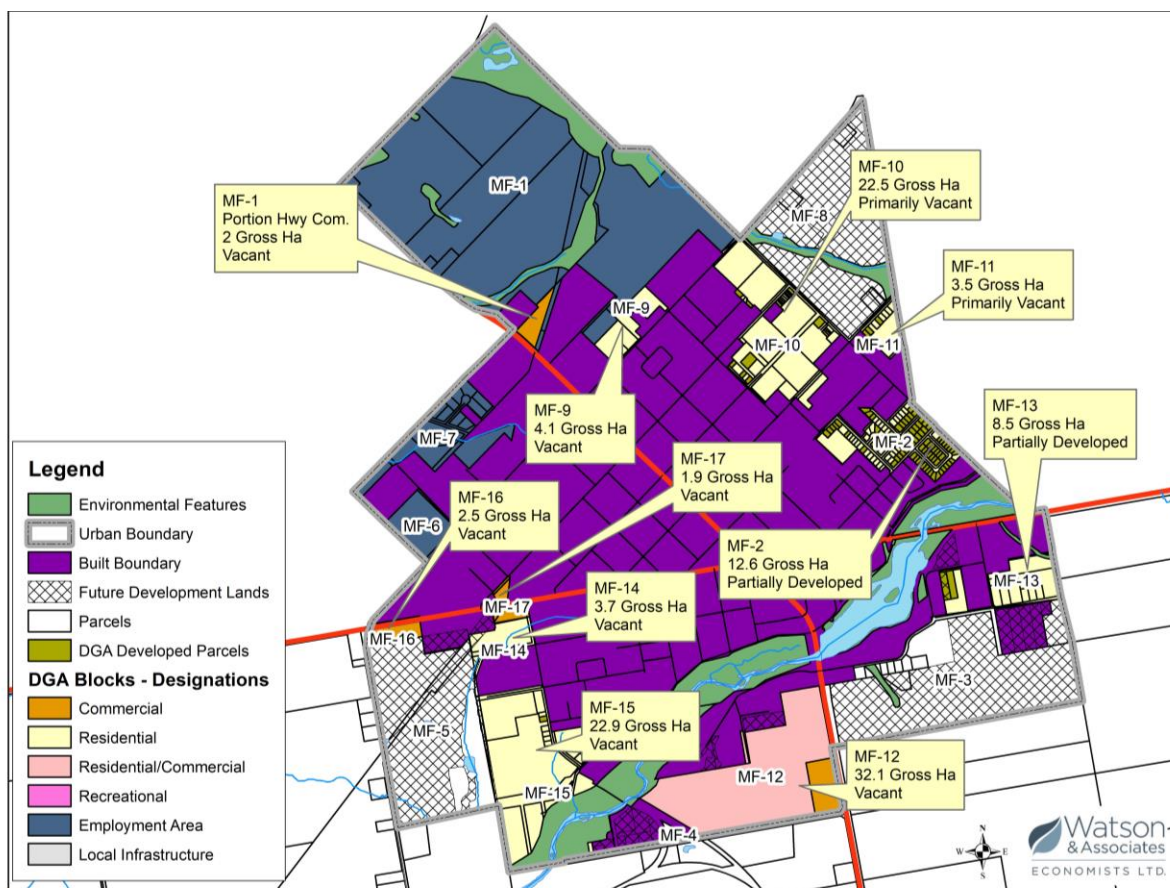
Figure C-9
County of Wellington
Arthur Village Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 33 Gross ha
Future Development in D.G.A. = 87 Gross ha
Note: Employment Area excluded in D.G.A. land area.



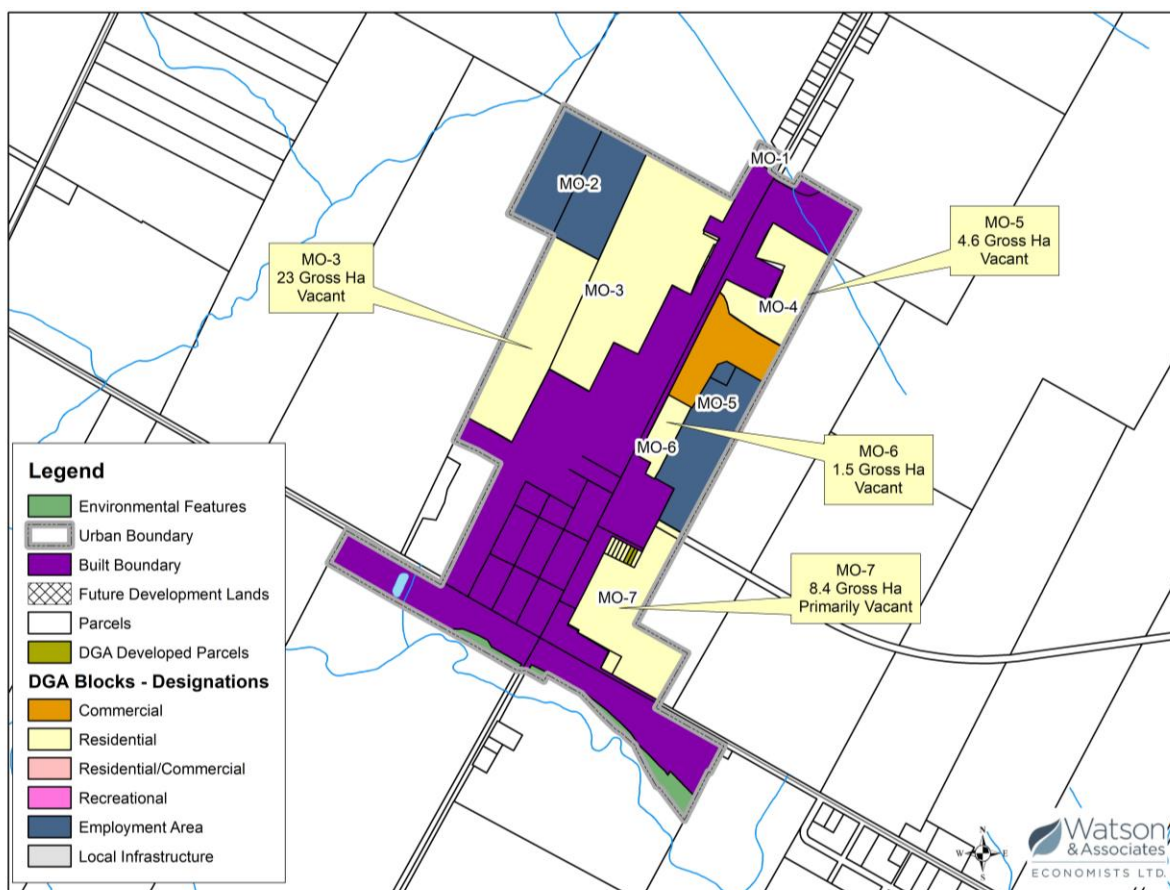
Figure C-10
County of Wellington
Mount Forest Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 116 Gross ha
Future Development in D.G.A. = 83 Gross ha
Note: Employment Area excluded in D.G.A. land area.



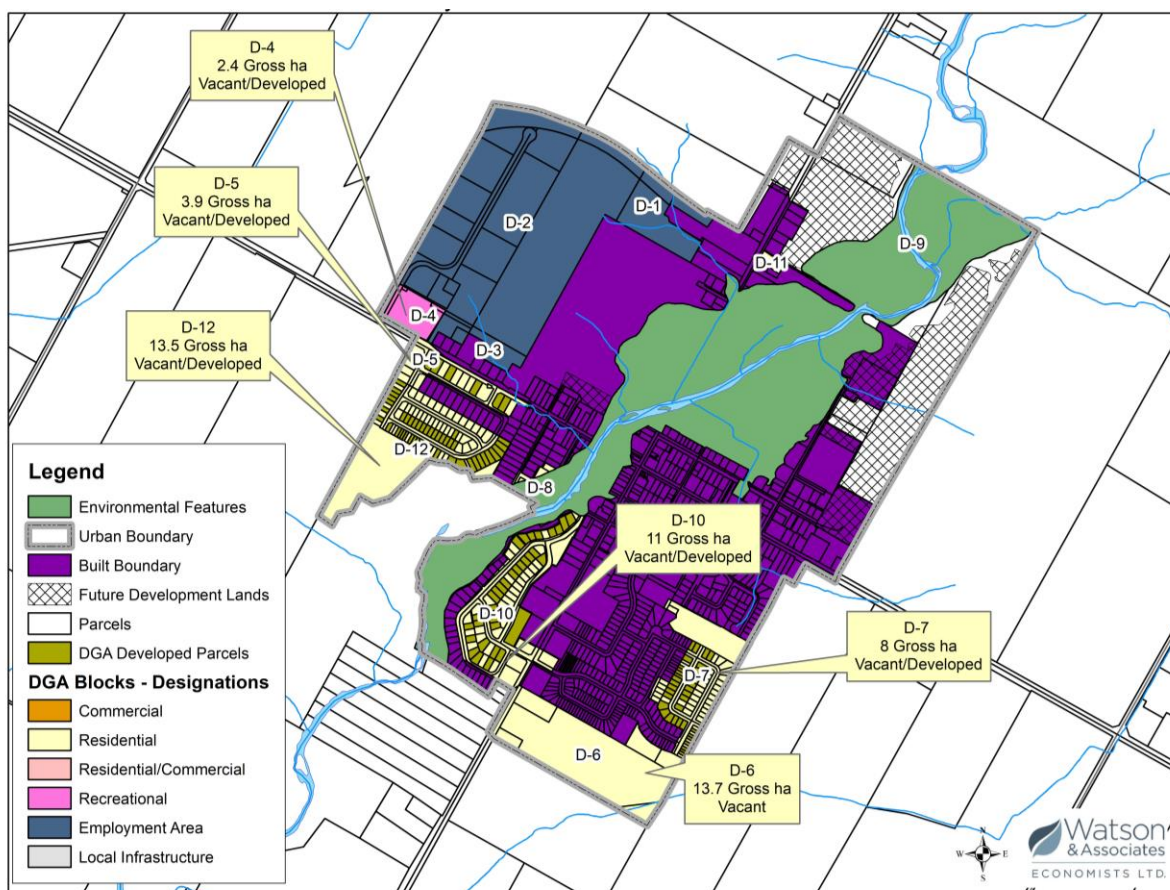
Figure C-11
County of Wellington
Moorefield Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 42 Gross ha
Future Development in D.G.A. = 0 Gross ha
Note: Employment Area excluded in D.G.A. land area.



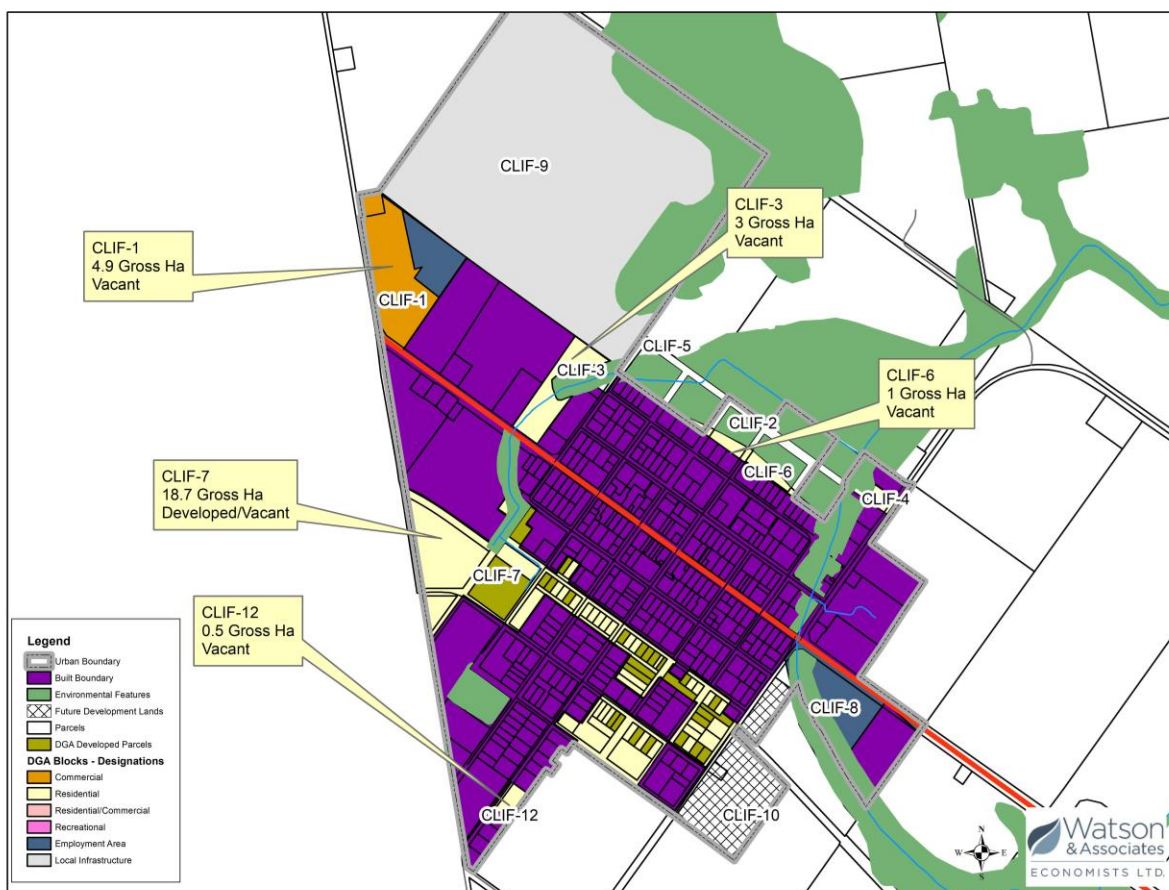
Figure C-12
County of Wellington
Drayton Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 53 Gross ha
Future Development in D.G.A. = 15 Gross ha
Note: Employment Area excluded in D.G.A. land area.



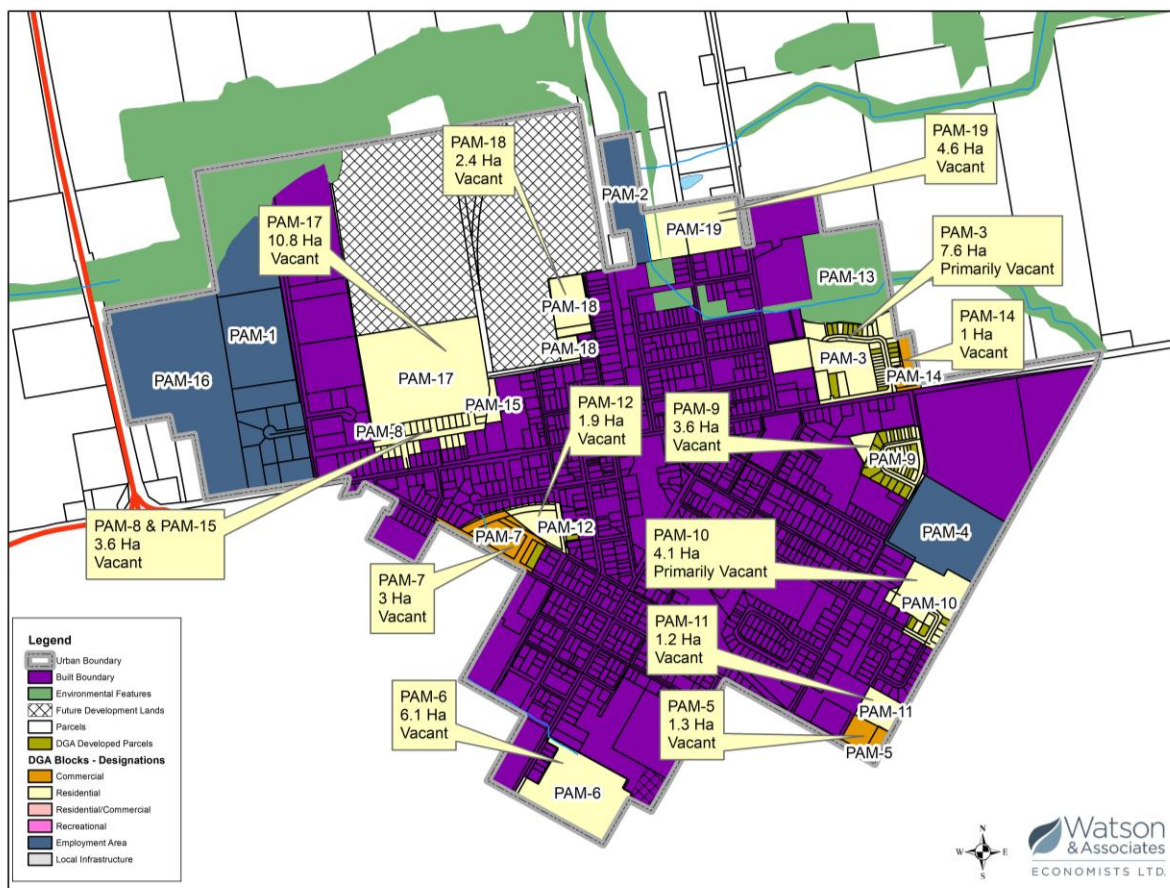
Figure C-13
County of Wellington
Clifford Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 26 Gross ha
Future Development in D.G.A. = 5 Gross ha
Note: Employment Area excluded in D.G.A. land area.



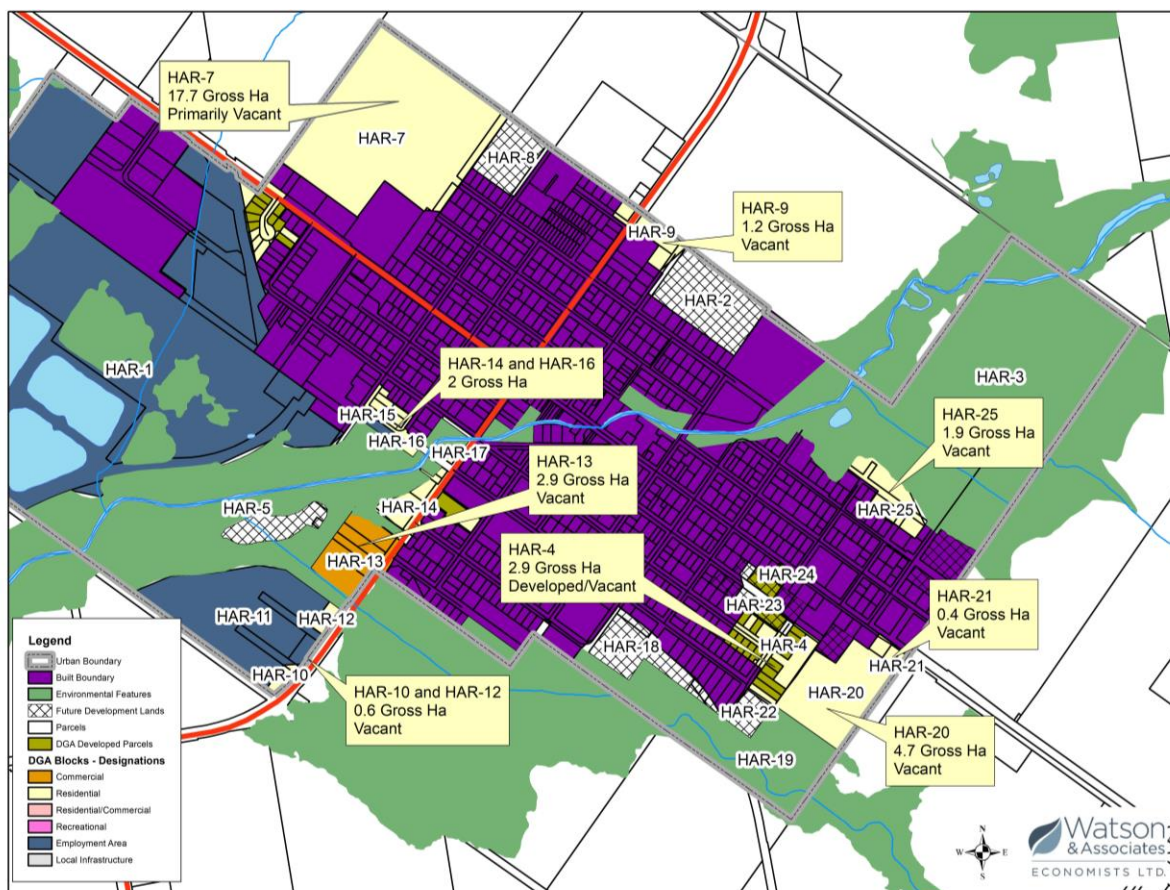
Figure C-14
County of Wellington
Palmerston Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 51 Gross ha
Future Development in D.G.A. = 48 Gross ha
Note: Employment Area excluded in D.G.A. land area.



Figure C-15
County of Wellington
Harriston Urban Centre
D.G.A. Land Supply



D.G.A. Land Area = 34 Gross ha
Future Development in D.G.A. = 8 Gross ha
Note: Employment Area excluded in D.G.A. land area.



Appendix D

D.G.A. Forecast and Community Area Land Needs Tables



Appendix D: D.G.A. Forecast and Land Community Area Land Needs Tables

Figure D-1
County of Wellington
D.G.A. Population, Housing and Employment Forecast at 2051

Area Municipality	D.G.A., Population 2051	D.G.A. Housing Units., 2051	Persons Per Unit (P.P.U.)	P.R.E. Jobs	P.R.E. Ratio (Residents per 1 P.R.E. Job)
Centre Wellington	26,800	9,460	2.83	4,200	6.4
Erin	11,200	3,990	2.81	2,300	4.9
Wellington North	6,500	2,190	2.97	1,000	6.5
Minto	5,300	1,810	2.93	800	6.4
Mapleton	4,100	1,490	2.75	500	8.2
Guelph-Eramosa	2,400	860	2.79	300	8.0
Total	56,300	19,800	2.84	9,100	6.2

Source: Watson & Associates Economists Ltd.

Figure D-2
Township of Wellington North
D.G.A. Community Area Land Needs to 2051

	Arthur	Mount Forest	Urban Area
Designated Greenfield Area			
Population, 2051	1,700	4,800	6,500
Housing Units, 2051	610	1,620	2,230
Community Area DGA Jobs, 2051	200	800	1,000
<i>Community Area DGA Jobs Ratio (DGA Residents per 1 job)</i>	5	6	6
DGA People and Jobs, 2051	1,900	5,600	7,500
People and Jobs Density (people and jobs/gross ha)	32	32	32
Total DGA Land Demand, gross ha	59	173	232
Designated Greenfield Area Land Supply, gross ha	33	116	149
Land Needs, gross ha	-26	-56	-83
Future Development Lands, gross ha	87	83	170
Excess/(Expansion Required)	60	27	87

Source: Watson & Associates Economists Ltd.



Figure D-3
Town of Minto
D.G.A. Community Area Land Needs to 2051

	Harriston	Palmerston	Clifford	Urban Area
Designated Greenfield Area				
Population, 2051	1,100	3,800	400	5,300
Housing Units, 2051	400	1,260	150	1,810
Community Area DGA Jobs, 2051	100	600	133	833
<i>Community Area DGA Jobs Ratio (DGA Residents per 1 job)</i>	11	6	3	7
DGA People and Jobs, 2051	1,200	4,400	533	6,133
People and Jobs Density (people and jobs/gross ha)	32	33	26	32
Total DGA Land Demand, gross ha	38	133	21	191
Designated Greenfield Area Land Supply, gross ha	34	51	26	112
Land Needs, gross ha	-3	-81	6	-79
Future Development Lands, gross ha	8	48	5	61
Excess/(Expansion Required)	5	-33	10	-18

Source: Watson & Associates Economists Ltd.

Figure D-4
Township of Mapleton
D.G.A. Community Area Land Needs to 2051

	Drayton	Moorefield	Urban Area
Designated Greenfield Area			
Population, 2051	2,300	1,800	4,100
Housing Units, 2051	870	620	1,490
Community Area DGA Jobs, 2051	300	200	500
<i>Community Area DGA Jobs Ratio (DGA Residents per 1 job)</i>	8	9	8
DGA People and Jobs, 2051	2,600	2,000	4,600
People and Jobs Density (people and jobs/gross ha)	32	32	32
Total DGA Land Demand, gross ha	81	62	143
Designated Greenfield Area Land Supply, gross ha	53	42	94
Land Needs, gross ha	-29	-20	-49
Future Development Lands, gross ha	15	0	15
Excess/(Expansion Required)	-13	-20	-33

Source: Watson & Associates Economists Ltd.



Figure D-5
Township of Centre Wellington
D.G.A. Community Area Land Needs to 2051

	Fergus	Elora	Urban Area
Designated Greenfield Area			
Population, 2051	19,800	7,000	26,800
Housing Units, 2051	7,010	2,450	9,460
Community Area DGA Jobs, 2051	2,900	1,300	4,200
<i>Community Area DGA Jobs Ratio (DGA Residents per 1 job)</i>	7	5	6
DGA People and Jobs, 2051	22,700	8,300	31,000
People and Jobs Density (people and jobs/gross ha)	48	43	47
Total DGA Land Demand, gross ha	471	193	664
Designated Greenfield Area Land Supply, gross ha	295	123	417
Land Needs, gross ha	-177	-70	-247
Future Development Lands, gross ha	0	0	0
Excess/(Expansion Required)	-177	-70	-247

Note: Unadjusted for Employment Area conversions. Adjusted for Employment Area conversions to Community Area land need: 238 ha.

Source: Watson & Associates Economists Ltd.



Figure D-6
Town of Erin
D.G.A. Community Area Land Needs to 2051

	Erin Village	Hillsburgh	Urban Area
Urban Area			
Population, 2051	10,700	6,100	16,800
Housing Units, 2051	3,770	2,180	5,950
Designated Greenfield Area			
Population, 2051	6,900	4,300	11,200
Housing Units, 2051	2,440	1,550	3,990
Community Area DGA Jobs, 2051	1,200	1,100	2,300
<i>Community Area DGA Jobs Ratio (DGA Residents per 1 job)</i>	6	4	5
DGA People and Jobs, 2051	8,100	5,400	13,500
People and Jobs Density (people and jobs/gross ha)	48	37	43
Total DGA Land Demand, gross ha	168	145	314
Designated Greenfield Area Land Supply, gross ha	168	107	275
Land Needs, gross ha	0	-38	-38
Future Development Lands, gross ha	0	38	38
Excess/(Expansion Required)	0	0	0

Source: Watson & Associates Economists Ltd.



Figure D-7
Township of Guelph-Eramosa
D.G.A. Community Area Land Needs to 2051

	Rockwood
Designated Greenfield Area	
Population, 2051	1,800
Housing Units, 2051	860
Community Area DGA Jobs, 2051	300
<i>Community Area DGA Jobs Ratio (DGA Residents per 1 job)</i>	8
DGA People and Jobs, 2051	2,100
People and Jobs Density (people and jobs/gross ha)	35
Total DGA Land Demand, gross ha	60
Designated Greenfield Area Land Supply, gross ha	60
Land Needs, gross ha	0
Future Development Lands, gross ha	0
Excess/(Expansion Required)	0

Source: Watson & Associates Economists Ltd.



Figure D-8
County of Wellington
D.G.A. Community Area Land Needs to 2051

	Urban Centres Total
Urban Area	
Population, 2051	106,900
Housing Units, 2051	40,170
Designated Greenfield Area	
Population, 2051	55,700
Housing Units, 2051	19,840
Community Area DGA Jobs, 2051	9,100
<i>Community Area DGA Jobs Ratio (DGA Residents per 1 job)</i>	6
DGA People and Jobs, 2051	64,800
People and Jobs Density (people and jobs/gross ha)	40
Total DGA Land Demand, gross ha	1,604
Designated Greenfield Area Land Supply, gross ha	1,107
Land Needs, gross ha	-496
Future Development Lands, gross ha	285
Excess/(Expansion Required)	-212

Source: Watson & Associates Economists Ltd.

- Expansion at the County-wide level is net change to urban area and factors in Excess Lands.



Appendix E

D.G.A. Housing Units Per ha and Community Land Needs Assumptions



Appendix E: D.G.A. Housing Units Per ha and Community Land Needs Assumptions

- Figure E-1 provides average units per ha based on the following people and jobs: 32 people and jobs/ha (the forecast average density for Minto, Mapleton and Wellington North) and 47 people and jobs/ha (the forecast average density for Centre Wellington) and 40 people and jobs/ha, the forecast County-wide average.
- An average density on a gross area basis is provided in Figure E-1. The gross land area includes other Community Area uses, including local roads and internal infrastructure, parks and open space and non-residential space (e.g., schools, commercial and other employment supportive uses). The residential area was calculated based on an average units per net ha assumption (as shown below) and an additional provision of 45% was applied for other Community Area uses. The “gross-up” factor varies slightly by Area Municipality depending on need for non-residential lands.

Figure E-1
County of Wellington
D.G.A. Housing Units Per ha and Community Land Needs Assumptions

Units Per Net ha	Density: 32 People and Jobs Per ha	Density: 47 People and Jobs Per ha	Density: 40 People and Jobs Per ha
Low Density, Units Per Net ha	15	22	19
Medium Density, Units Per Net ha	30	40	36
High Density, Units Per Net ha	60	70	67
Average Units per Net ha	17	26	23
Gross Factor and to Account for Other Community Land Use (Units per net ha divided by 1.8) Additional 45% Added to Land Area			
Average Housing Units Per Gross ha	9	14	12

Source: Watson & Associates Economists Ltd.



County of Wellington Community Area D.G.A. Land Needs Assumptions

Figure E-2
County of Wellington
Community Area Land Needs Assessment Assumptions, 2019 to 2051

Components of Gross Developable Area (Growth Plan) ^[1]	Ha	%
Residential (lots)	756	55%
Commercial & Institutional	117	8%
Open Space (parks and stormwater)	180	13%
Roads (excludes highways)	334	24%
Total Gross Developable Area (Growth Plan)¹	1,387	100%

^[1] Gross Developable is based on the Growth Plan, 2019 and excludes the following: natural features; highways; railways; utilities corridors and cemeteries.

D.G.A. Population and Housing, 2019 to 2051	Housing Units	%	P.P.U.	Population	Add Undercount 3%
Single detached and Semi-detached	12,305	72%	3.10	38,100	39,200
Townhouses, Row Houses	3,540	21%	1.99	7,100	7,300
Apartments (including Stacked Townhouses)	1,241	7%	1.72	2,100	2,200
Total	17,086	100%	2.77	47,300	48,700

D.G.A. Employment, 2019 to 2051	
Commercial & Institutional, ha	117
Commercial & Institutional Employment Density (blended average) (jobs/ha)	41
Commercial/Institutional Jobs	4,820
Work at Home Employment, 1 job per 14 residents	3,480
Total D.G.A. Employment	8,300

Density	People and Jobs	Housing Units	Area (ha)	Units per ha	People and Jobs per ha
Gross Area (excluding Growth Plan take-outs and natural features)	57,000	17,086	1,387	12	41
Net Residential Area	57,000	17,086	756	23	75

Density at 2051	Area (ha)	People and Jobs	People and Jobs per ha
Developed D.G.A. as of 2019	216	7,800	36
New D.G.A. Development (Vacant/S.A.B.E.)	1,387	57,000	41
Total D.G.A., County of Wellington	1,603	64,800	40

Source: Watson & Associates Economists Ltd.



Figure E-3
D.G.A. Housing Units Per ha and Community Land Needs Assumptions
Tables 1 to 7

Table 1
County of Wellington
D.G.A. Community Area Land Needs, 2019 to 2051

Designated Greenfield Area		Low	Medium	High	Total
Housing Unit Forecast, 2019-2051	A	12,305	3,543	1,238	17,086
Housing Units Per Net ha	B	19	36	67	23
Net Residential land Area Required	$C = A / B$	638	100	18	756
Gross Factor and to Account for Other Community Land Use/Local Infrastructure	D				1.8
Other Community Area Uses / Local Infrastructure, % of Land Area	%				45%
Community Area, Gross Land Area ha	$E = C \times D$				1,387
Gross Units Per Ha	$F = A / E$				12
Vacant D.G.A. Lands, Including Future Development, Gross ha	G				1,175
Excess / (Expansion Required), gross ha	$H = G - E$				-212

Source: Watson & Associates Economists Ltd.



Table 2
Township of Wellington North
D.G.A. Community Area Land Needs, 2019 to 2051

Designated Greenfield Area		Low	Medium	High	Total
Housing Unit Forecast, 2019-2051	A	1,558	376	103	2,037
Housing Units Per Net ha	B	15	30	60	17
Net Residential land Area Required	$C = A / B$	104	13	2	118
Gross Factor and to Account for Other Community Land Use/Local Infrastructure	D				1.8
Other Community Area Uses / Local Infrastructure, % of Land Area	%				44%
Community Area, Gross Land Area ha	$E = C \times D$				210
Gross Units Per Ha	$F = A / E$				10
Vacant D.G.A. Lands, Including Future Development, Gross ha	G				297
Excess / (Expansion Required), gross ha	$H = G - E$				87

Source: Watson & Associates Economists Ltd.

Table 3
Town of Minto
D.G.A. Community Area Land Needs, 2019 to 2051

Designated Greenfield Area		Low	Medium	High	Total
Housing Unit Forecast, 2019-2051	A	1,232	312	103	1,647
Housing Units Per Net ha	B	15	30	60	17
Net Residential land Area Required	$C = A / B$	82	11	2	94
Gross Factor and to Account for Other Community Land Use/Local Infrastructure	D				1.9
Other Community Area Uses / Local Infrastructure, % of Land Area	%				47%
Community Area, Gross Land Area ha	$E = C \times D$				177
Gross Units Per Ha	$F = A / E$				9
Vacant D.G.A. Lands, Including Future Development, Gross ha	G				159
Excess / (Expansion Required), gross ha	$H = G - E$				-18

Source: Watson & Associates Economists Ltd.



Table 4
Township of Mapleton
D.G.A. Community Area Land Needs, 2019 to 2051

Designated Greenfield Area		Low	Medium	High	Total
Housing Unit Forecast, 2019-2051	A	902	272	80	1,254
Housing Units Per Net ha	B	15	30	60	18
Net Residential land Area Required	$C = A / B$	60	9	1	71
Gross Factor and to Account for Other Community Land Use/Local Infrastructure	D				1.8
Other Community Area Uses / Local Infrastructure, % of Land Area	%				45%
Community Area, Gross Land Area ha	$E = C \times D$				128
Gross Units Per Ha	$F = A / E$				10
Vacant D.G.A. Lands, Including Future Development, Gross ha	G				95
Excess / (Expansion Required), gross ha	$H = G - E$				-33

Source: Watson & Associates Economists Ltd.



Table 5
Township of Centre Wellington
D.G.A. Community Area Land Needs, 2019 to 2051

Designated Greenfield Area		Low	Medium	High	Total
Housing Unit Forecast, 2019-2051	A	5,572	1,949	329	7,850
Housing Units Per Net ha	B	22	40	70	26
Net Residential land Area Required	$C = A / B$	253	49	5	307
Gross Factor and to Account for Other Community Land Use/Local Infrastructure	D				1.8
Other Community Area Uses / Local Infrastructure, % of Land Area	%				44%
Community Area, Gross Land Area ha	$E = C \times D$				552
Gross Units Per Ha	$F = A / E$				14
Vacant D.G.A. Lands, Including Future Development, Gross ha	G				305
Excess / (Expansion Required), gross ha	$H = G - E$				-247

Note: Unadjusted for Employment Area conversions to Community Area use.
Source: Watson & Associates Economists Ltd.



Table 6
Town of Erin
D.G.A. Community Area Land Needs, 2019 to 2051

Designated Greenfield Area		Low	Medium	High	Total
Housing Unit Forecast, 2019-2051	A	2,805	600	566	3,971
Housing Units Per Net ha	B	22	35	70	26
Net Residential land Area Required	$C = A / B$	128	17	8	153
Gross Factor and to Account for Other Community Land Use/Local Infrastructure	D				2.0
Other Community Area Uses / Local Infrastructure, % of Land Area	%				50%
Community Area, Gross Land Area ha	$E = C \times D$				306
Gross Units Per Ha	$F = A / E$				13
Vacant D.G.A. Lands, Including Future Development, Gross ha	G				306
Excess / (Expansion Required), gross ha	$H = G - E$				0

Source: Watson & Associates Economists Ltd.



Table 7
Township of Guelph-Eramosa
D.G.A. Community Area Land Needs, 2019 to 2051

Designated Greenfield Area		Low	Medium	High	Total
Housing Unit Forecast, 2019-2051	A	236	34	57	327
Housing Units Per Net ha	B	22	33	65	26
Net Residential land Area Required	$C = A / B$	11	1	1	13
Gross Factor and to Account for Other Community Land Use/Local Infrastructure	D				1.0
Other Community Area Uses / Local Infrastructure, % of Land Area	%				3%
Community Area, Gross Land Area ha	$E = C \times D$				13
Gross Units Per Ha	$F = A / E$				25
Vacant D.G.A. Lands, Including Future Development, Gross ha	G				13
Excess / (Expansion Required), gross ha	$H = G - E$				0

Source: Watson & Associates Economists Ltd.



Appendix F

Commercial Land Supply and Demand Tables and Mapping



Appendix F: Commercial Land Supply and Demand Tables and Mapping

Figure F-1
County of Wellington
Commercial Service and Retail Building Floor Space (Gross Leasable Area), sq.ft.
As of Mid-2020

Urban Centre	Total sq.ft.	Central Business District, sq.ft.	Highway Commercial, sq.ft.	Other, sq.ft.
Fergus	1,114,000	360,800	734,300	18,500
Mount Forest	420,000	206,100	159,200	54,200
Elora	322,000	165,200	147,400	8,100
Arthur	269,000	169,500	89,200	10,500
Harriston	216,000	145,900	70,200	0
Palmerston	167,000	96,100	63,900	6,900
Erin Village	164,000	81,100	81,100	0
Drayton	130,000	73,600	56,600	0
Rockwood	99,000	44,700	45,500	8,800
Hillsburgh	66,000	43,200	20,100	2,200
Moorefield	54,000	34,000	20,000	0
Morrison	49,000	49,000	0	0
Clifford	45,000	42,600	2,500	0
Total	3,115,000	1,511,800	1,490,000	109,200

Note: Other includes commercial service and retail uses on sites not designated Central Business District or Highway Commercial.

Source: Watson & Associates Economists Ltd.



Figure F-2
County of Wellington
Vacant Highway Commercial Land Supply as of July 2019

Urban Centre	Total Gross, ha (Net of Environmental Features)	Total Net Developable Land Area, ha	Estimated Employment Capacity	Estimated Commercial Floor Space Capacity (sq.ft.)
Fergus	70	27	1,480	725,000
Erin Village	32	17	910	446,000
Elora	25	13	690	338,000
Mount Forest	16	9	490	240,000
Clifford	13	5	300	147,000
Moorefield	8	4	240	118,000
Palmerston	8	3	160	78,000
Harriston	1	0.4	20	10,000
Drayton	2	0.2	10	5,000
Rockwood	1	0.2	10	5,000
Arthur	2	0.3	10	5,000
Hillsburgh	0	0.0	0	0
Total	178	79	4,320	2,117,000

Note: Estimated Commercial and Retail Employment capacity based on 55 jobs/ha. Estimated Commercial Service and Retail Building Floor Space Capacity (sq.ft.) based on 490 sq.ft. per employee and assumes 25% building coverage.

Source: Land supply based on data from the County of Wellington as of mid-2019. Demand forecast by Watson & Associates Economists Ltd.



Figure F-3
Fergus Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

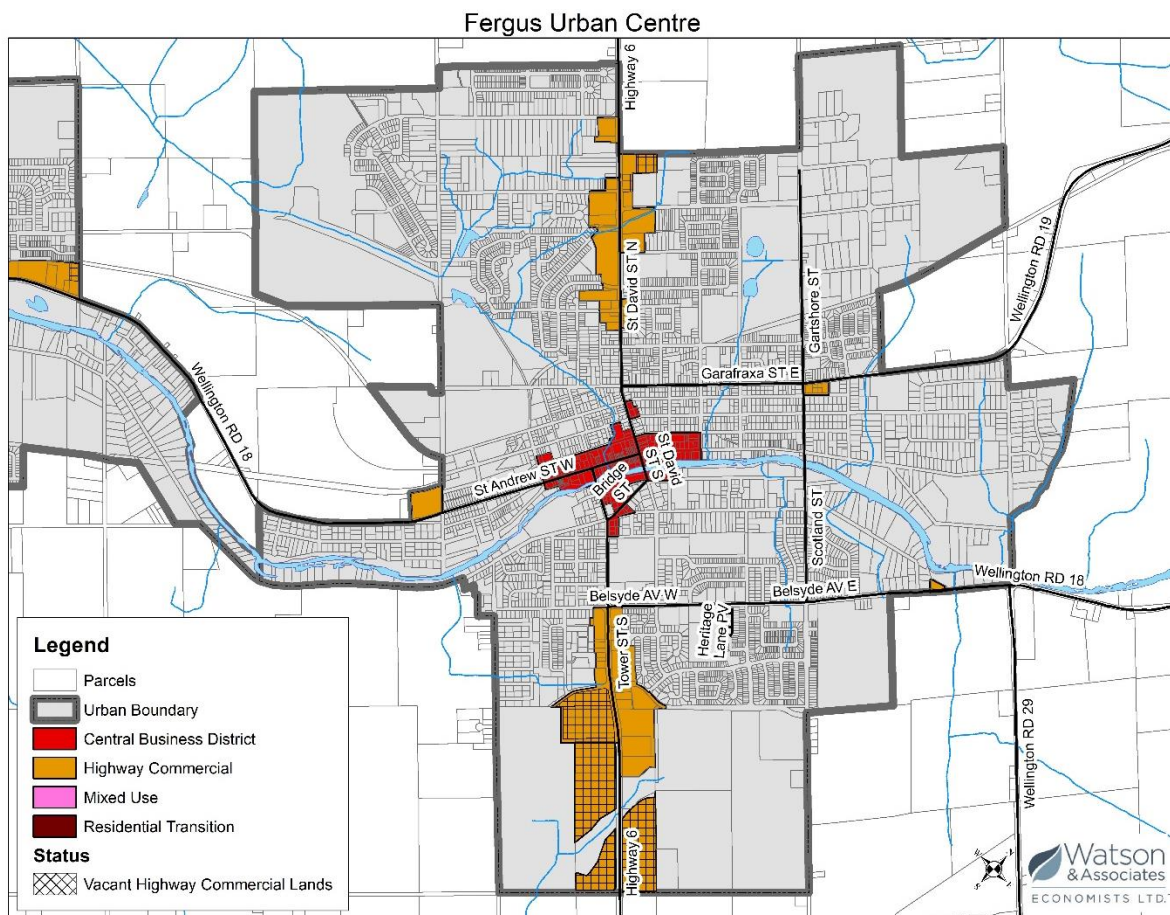




Figure F-4
Elora Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

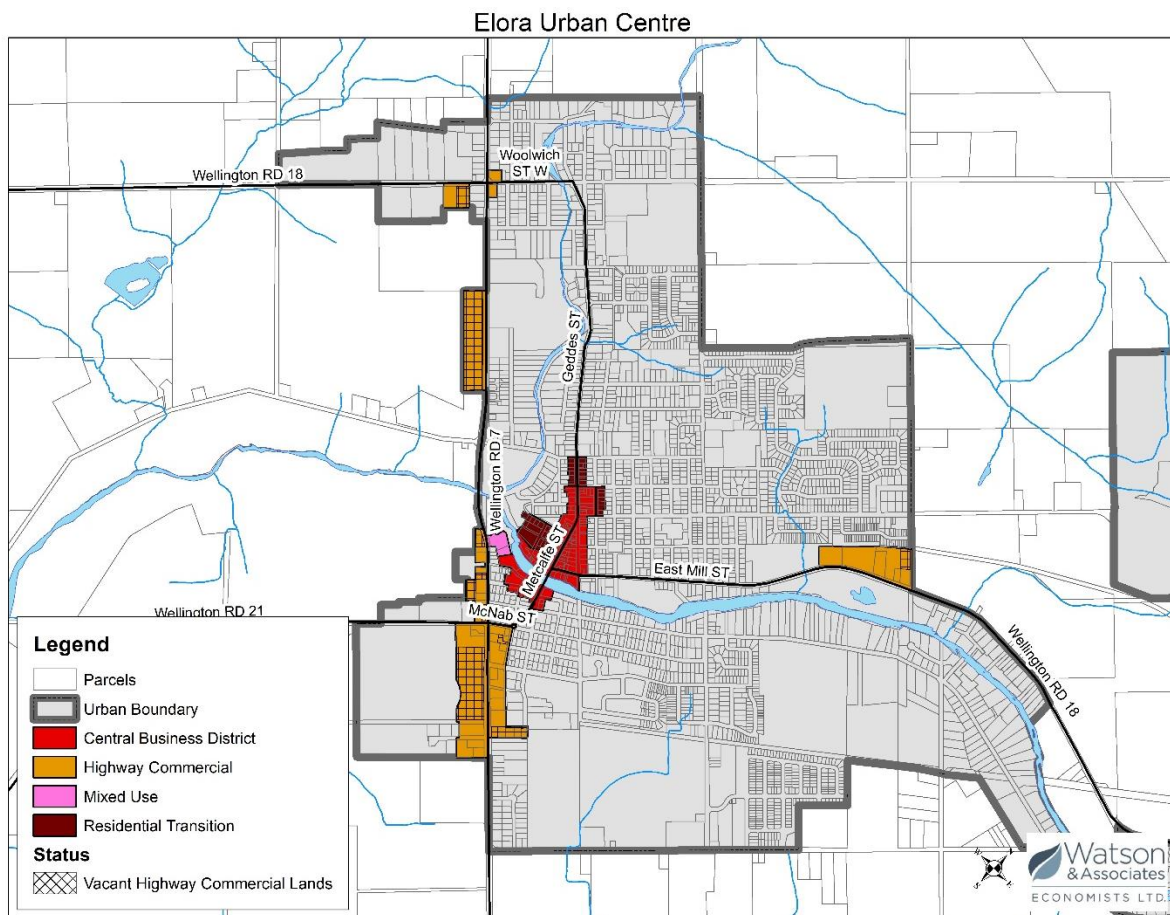




Figure F-5
Rockwood Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

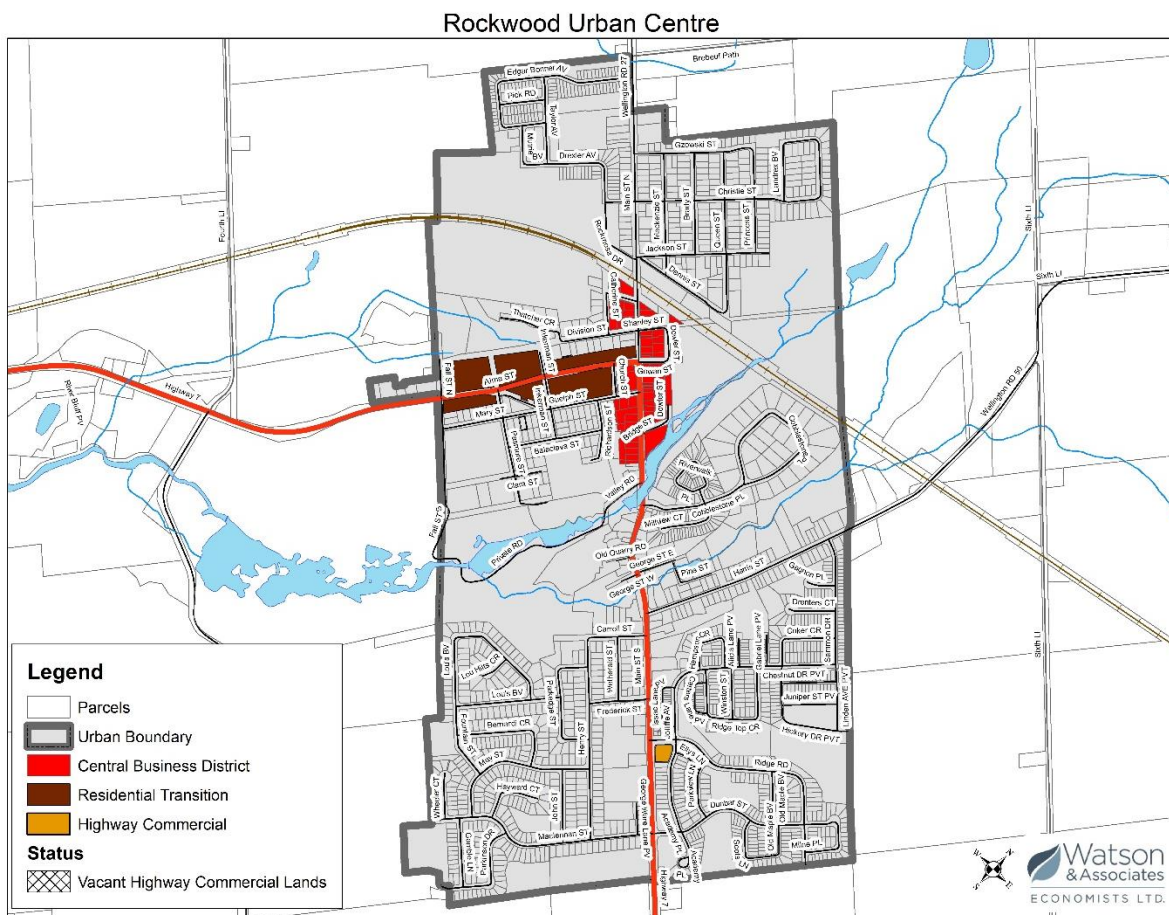




Figure F-6
Erin Village Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

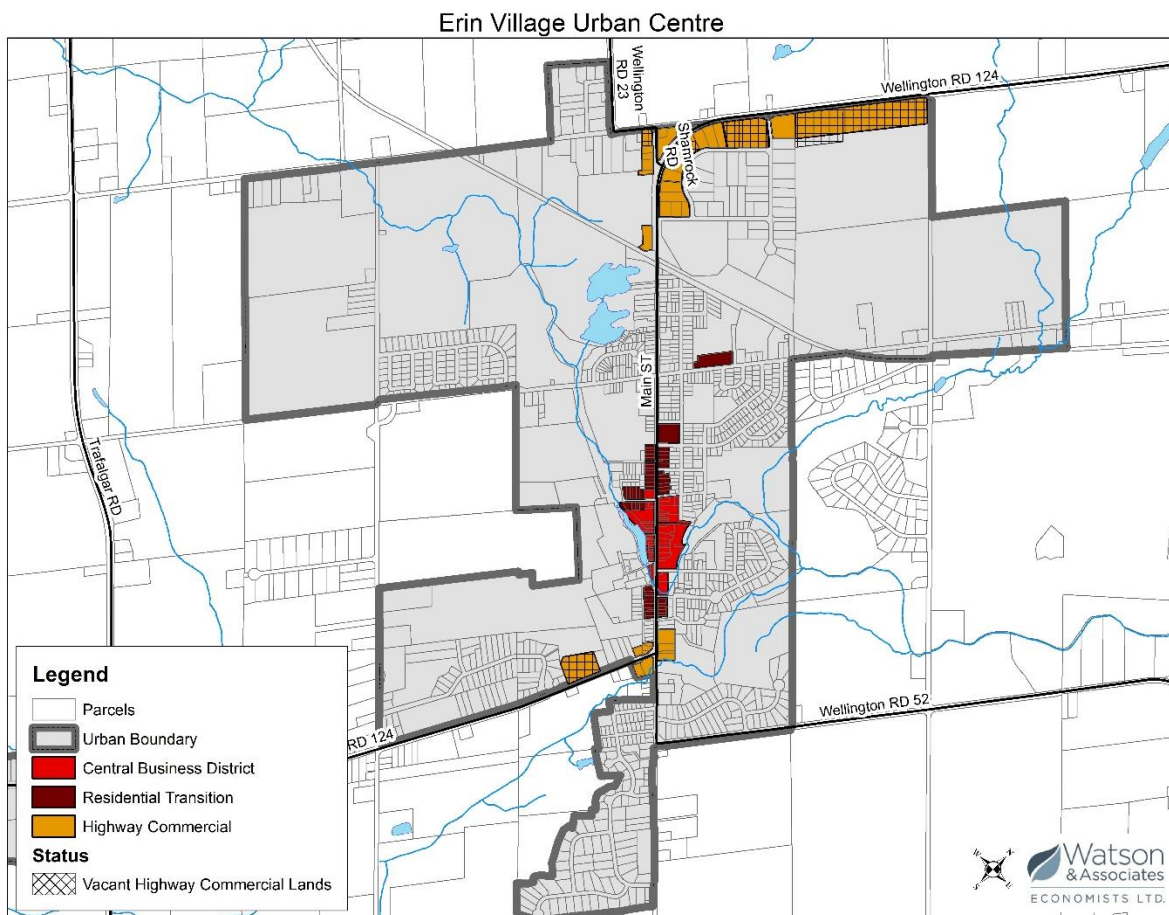




Figure F-7
Hillsburgh Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

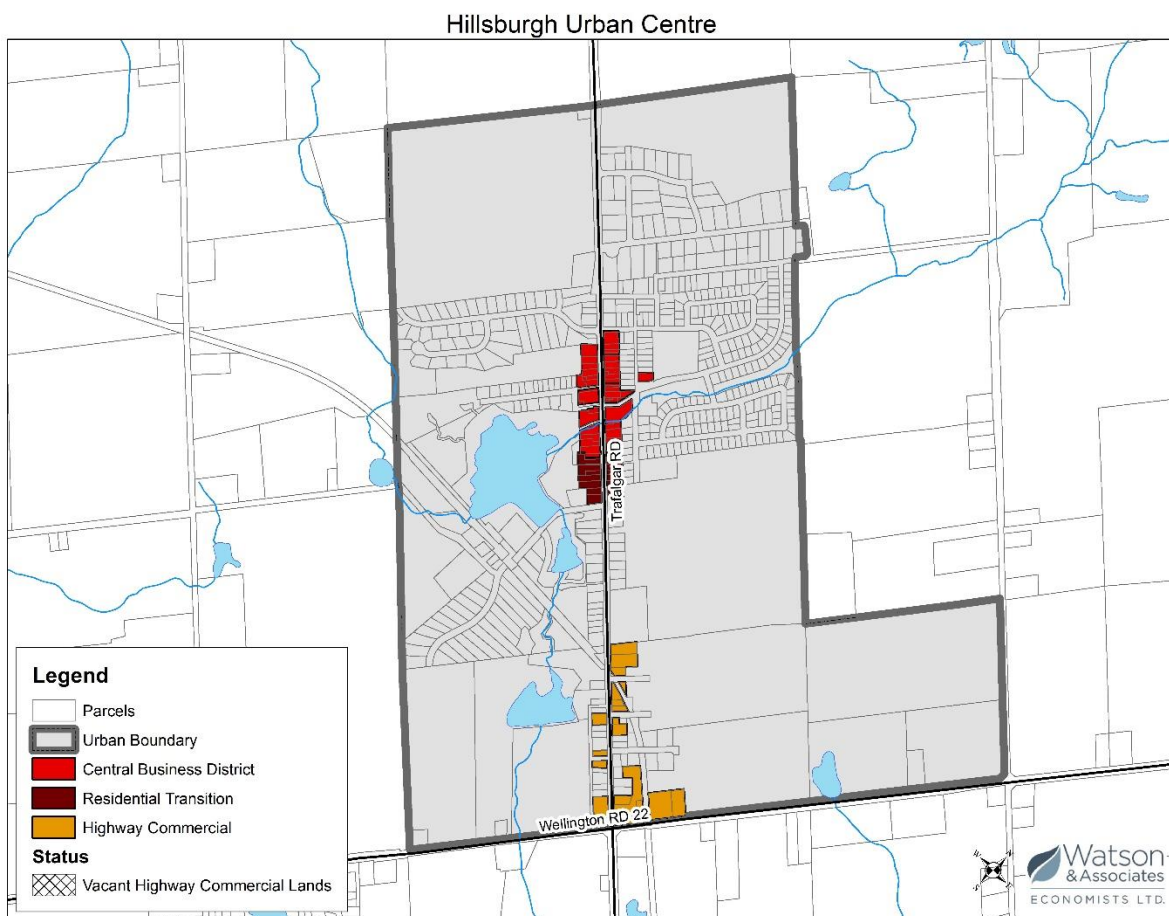




Figure F-8
Drayton Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

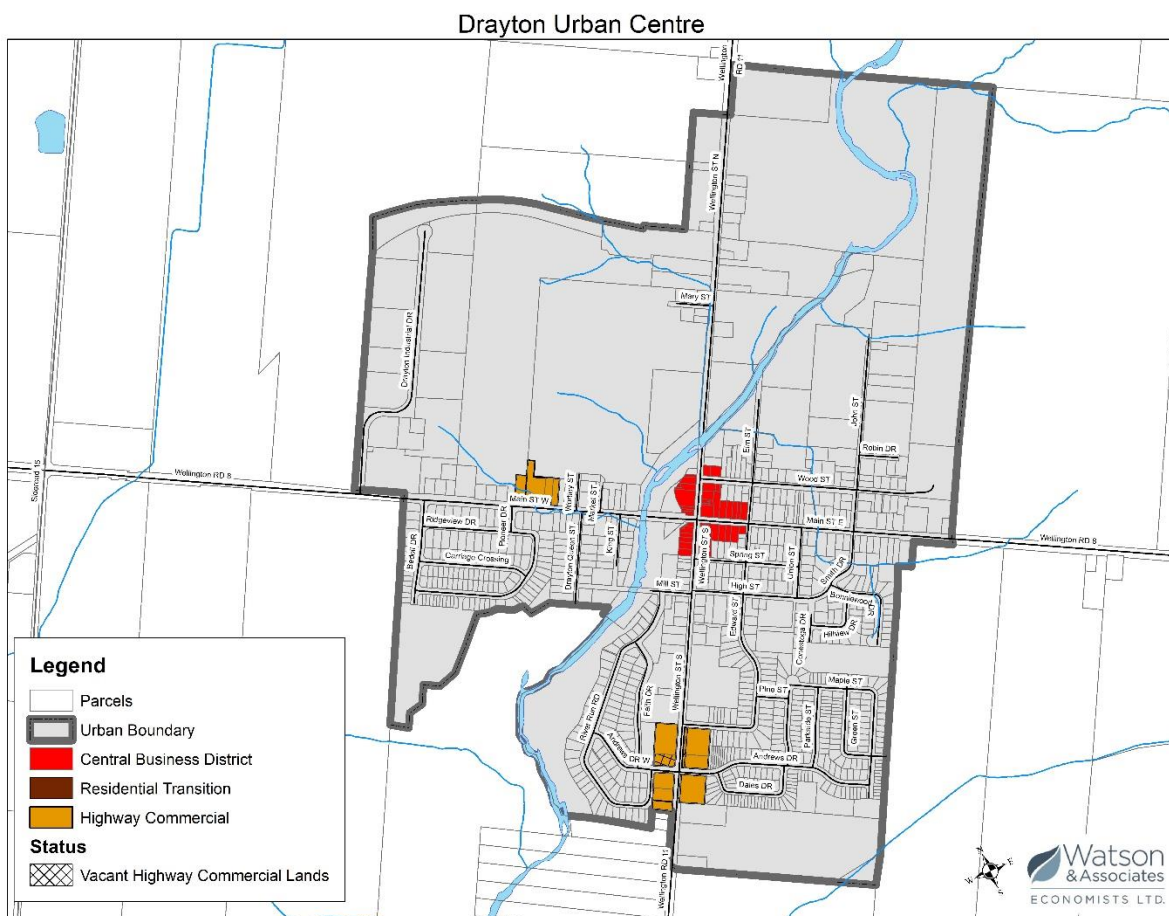




Figure F-10
Arthur Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

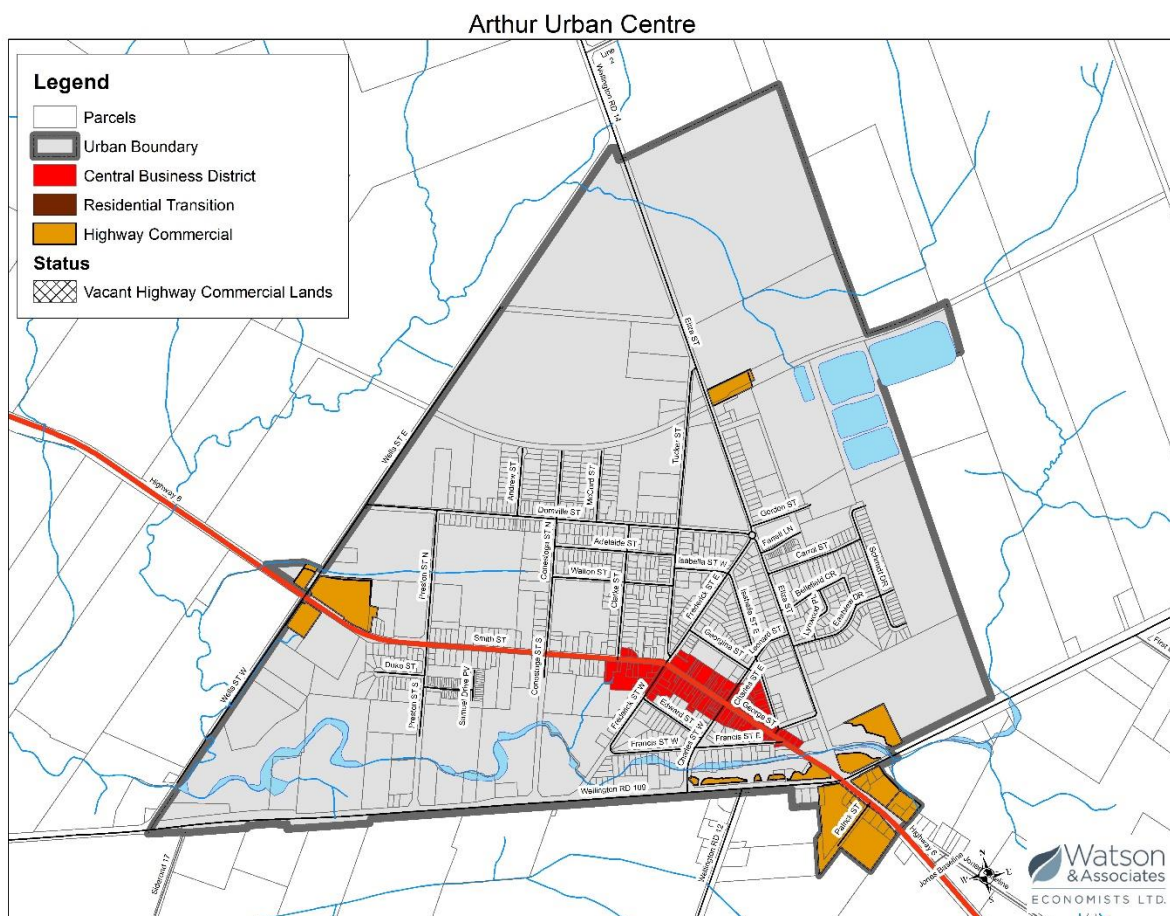




Figure F-11
Mount Forest Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

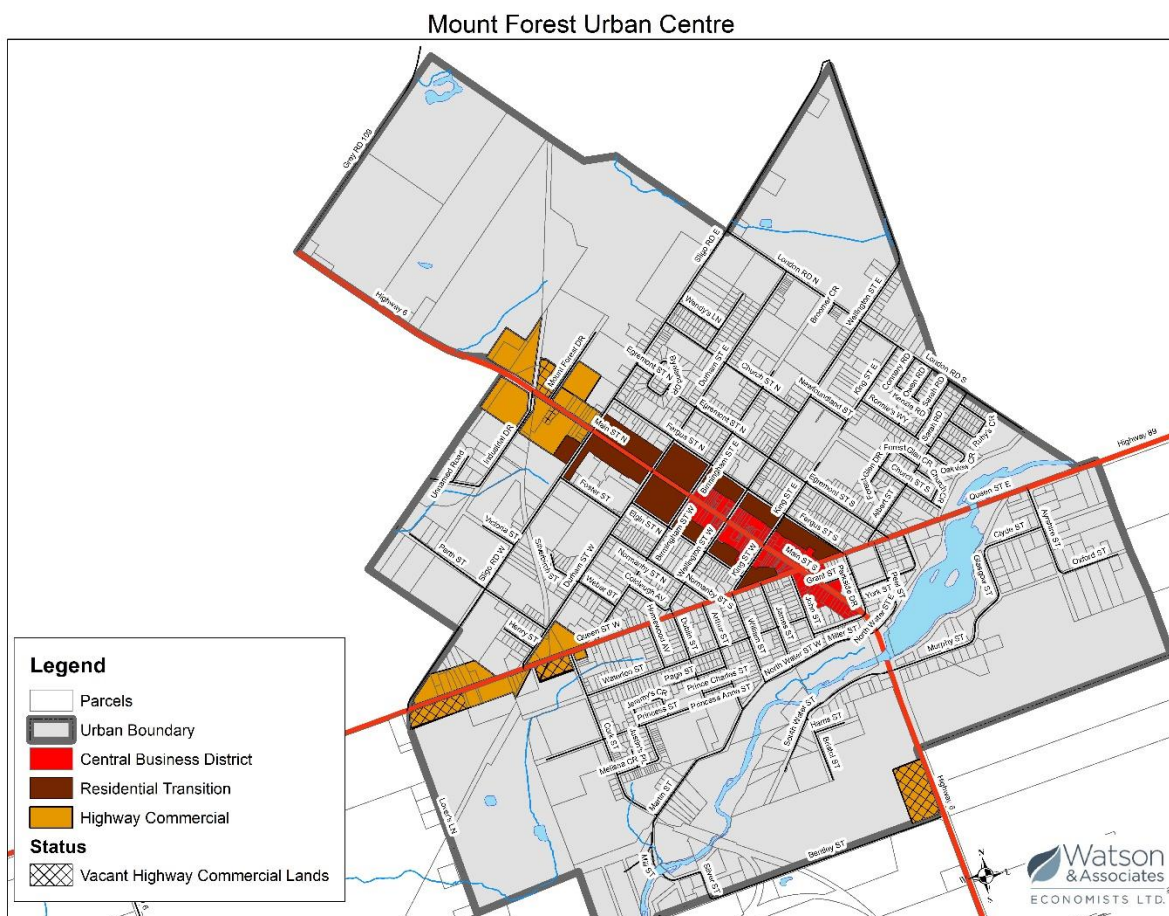




Figure F-12
Palmerston Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

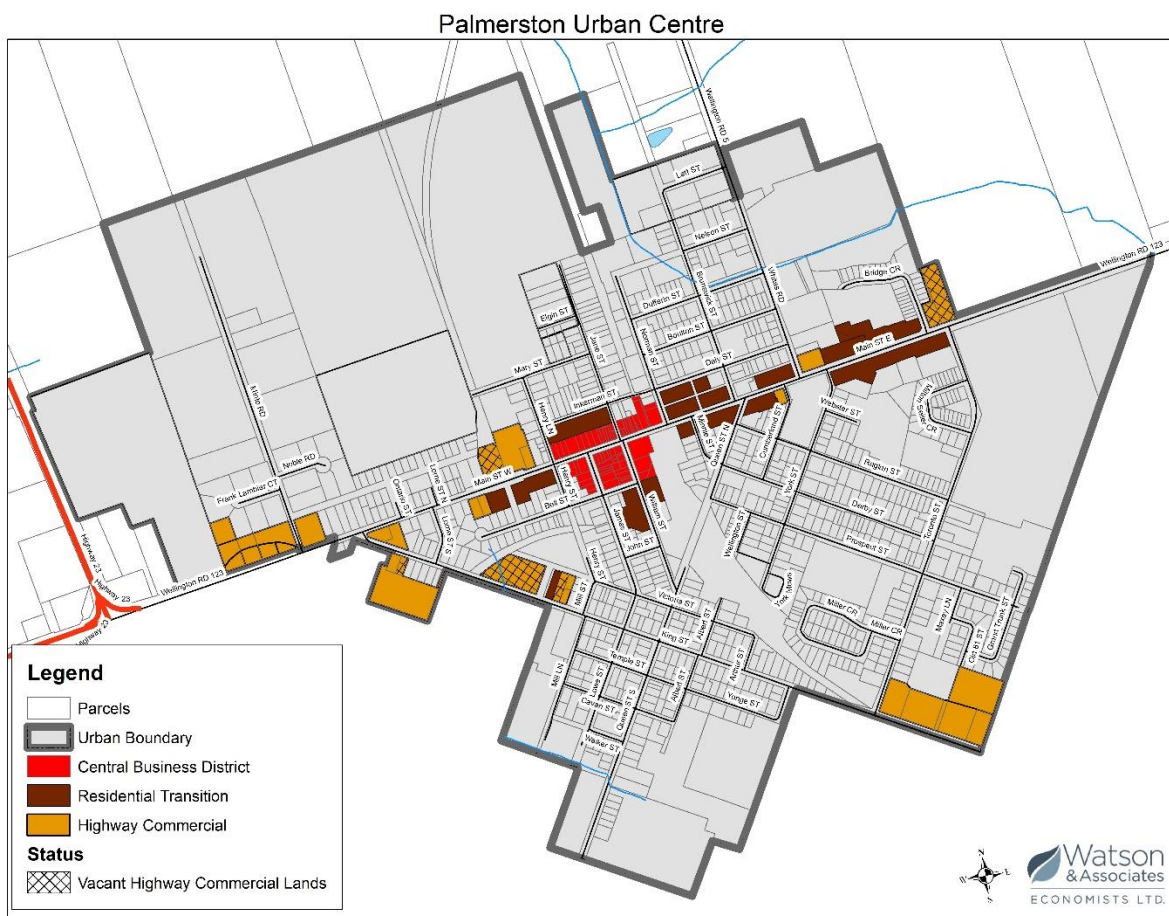




Figure F-13
Harriston Urban Centre
Vacant Highway Commercial Land Supply as of July 2019

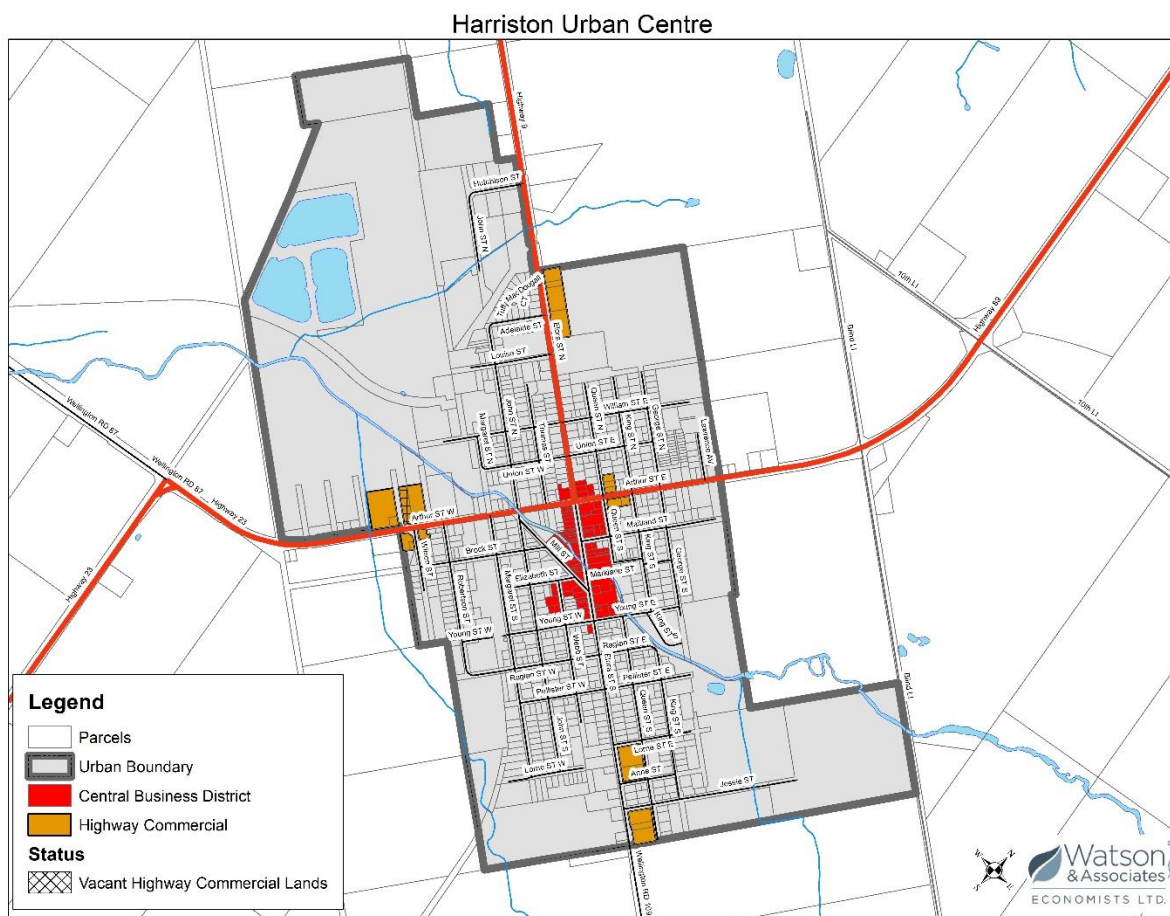
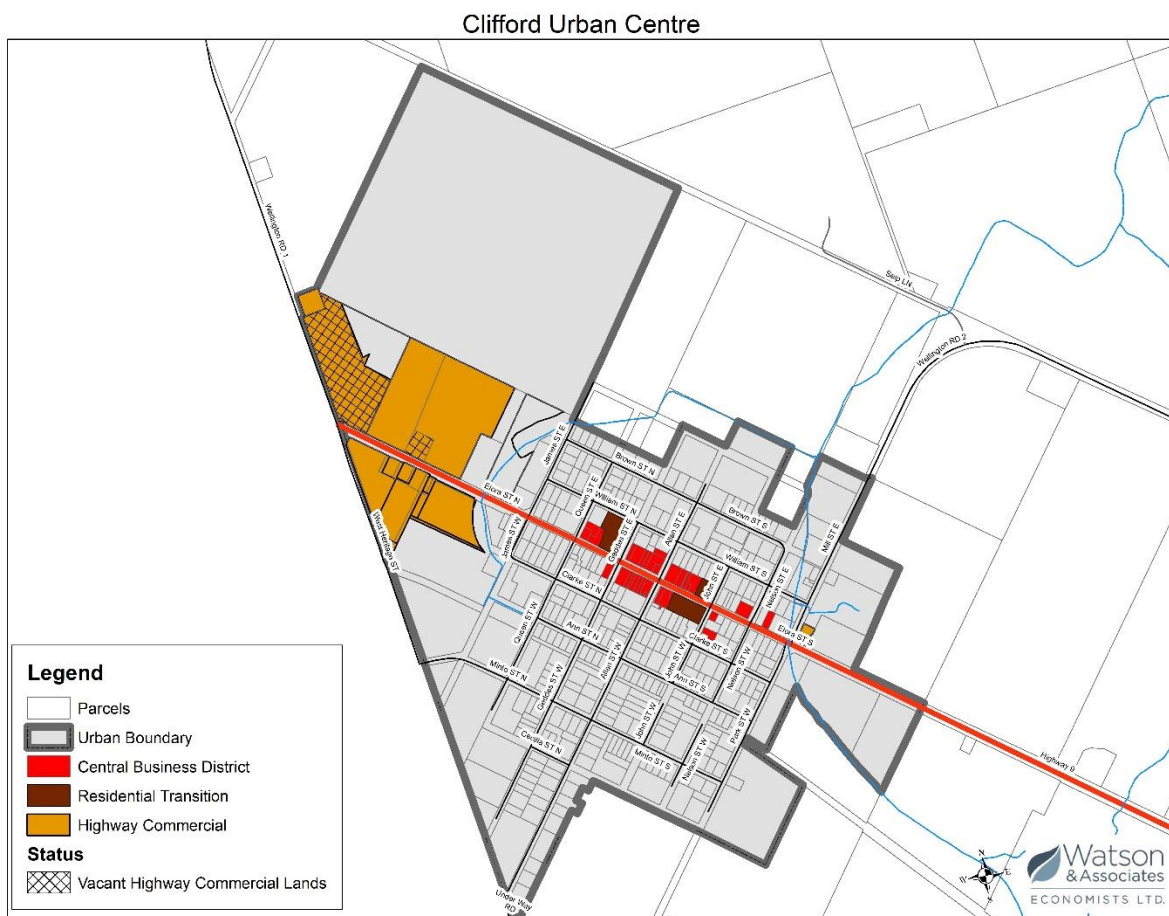




Figure F-14
Clifford Urban Centre
Vacant Highway Commercial Land Supply as of July 2019





Appendix G

Employment Area Land Supply and Density Figures



Appendix G: Employment Area Land Supply and Density Figures

Figure G-1
County of Wellington
Urban Employment Areas
Employment Area Vacant Land Supply as of July 2019

Municipality	Urban Employment Area Land Supply (Gross ha)	Land Vacancy Adjustment (20%)	Adjusted Land Supply (Gross ha)
Centre Wellington	102	20	82
Wellington North	140	28	112
Erin	37	7	30
Mapleton	55	11	44
Minto	92	18	73
Total Urban Employment Areas	431	86	345

Note: Erin land supply excludes 5.7 gross ha of deferred lands (Erin O.P.A. 12).

Source: Derived from County of Wellington supply data by Watson & Associates Economists Ltd.



Figure G-2
County of Wellington
Rural Employment Areas
Employment Area Vacant Land Supply as of July 2019

Municipality	Rural Employment Area Land Supply (Gross ha)	Land Vacancy Adjustment (20%)	Adjusted Land Supply (Gross ha)
Centre Wellington	0	0	0
Wellington North	54	9	45
Guelph-Eramosa	335	56	279
Erin	0	0	0
Mapleton	25	4	21
Minto	0	0	0
Puslinch	204	34	170
Total Rural Employment Area	618	104	514

Source: Derived from County of Wellington supply data by Watson & Associates Economists Ltd.



Figure G-3
County of Wellington
Urban Employment Areas
Employment Area Density Sample, Net ha

Municipality	Urban Employment Areas	Total Developed Land Area, Net Ha			Developed Parcels (Count)	Employment Area Density Sample					Estimated Urban Employment Area Employment ³	Estimated ELE within Employment Areas
		Industrial Uses ¹	Commercial and Institutional Uses ²	Total		Land Area, Net ha	Parcels in Sample (Count)	Employees	Density (jobs/net ha)	Sample as % of Developed Land Area		
		A	B	C = A + B	D	E	F	G	H = G / E	I = E / C	J = H x D	K
Centre Wellington	Elora	53	37	90	29	60	12	1,055	18	67%	1,580	1,260
	Fergus	82	16	98	67	65	43	1,415	22	67%	2,105	1,850
	Centre Wellington	134	53	188	96	125	55	2,470	20	67%	3,690	3,110
Wellington North	Mount Forest	36	8	44	39	33	20	735	23	74%	995	850
	Arthur	24	0.4	25	10	25	10	805	33	100%	805	760
	Wellington North	60	8	69	49	57	30	1,540	27	83%	1,850	1,610
Mapleton	Drayton	19	0	19	10	5	3	115	24	25%	460	460
	Moorefield	3	0	3	3	2	2	30	14	63%	50	50
	Mapleton	23	0	23	13	7	5	145	21	31%	510	510
Minto	Clifford	5	0	5	4	5	3	50	10	97%	50	50
	Harriston	13	4	17	17	7	4	120	17	41%	285	260
	Palmerston	23	0.4	23	21	19	8	835	45	80%	940	850
	Minto	41	4	45	42	30	15	1,005	33	68%	1,480	1,160
Erin	Erin	58	2	60	44	37	26	655	18	62%	1,050	950
	Erin	58	2	60	44	37	26	655	18	62%	1,050	950
Total Wellington County Urban Employment Areas		316	67	384	244	257	131	5,815	23	67%	8,580	7,340
		82%	18%	100%								86%

Source: Watson & Associates Economists Ltd. Employment data used in sample based on InfoCanada business directory database as of August 2020.

¹Includes industrial-type buildings.

²Includes commercial-type buildings (e.g. Grand River Racetrack/Casino in Elora, municipal buildings, offices, restaurants, gas stations and other retail-type buildings).

³Employment on parcels not include in the sample for Palmerston based on 23 jobs/net ha based due to the remaining parcels are estimated to have a lower density than sample.



Figure G-4
County of Wellington
Rural Employment Areas
Employment Area Density Sample, Net ha

Rural Employment Areas	Developed Land Area, Ha			Number of Parcels (Count)	Density (jobs/net ha)	Estimated Employment
	Industrial Uses	Commercial & Institutional Uses	Total			
Centre Wellington						
Guelph Utility Pole Industrial Lands	9	0.0	9	1	6	55
Middlebrook Road (Vacant Water Bottling Plant)	2	0.0	2	1	0	0
sub-Total Centre Wellington Rural Employment Areas	11	0	11	2	5	55
Guelph/Eramosa						
Crewson's Corner Industrial Area	28	0.0	28	17	10	280
Highway 7 Employment Area	2	0.0	2	5	10	20
Mann Construction Lands	12	0.0	12	4	7	90
North of Hartfield	0	8.2	8	3	26	210
Wellington Road 124 Industrial Area	60	6.2	66	33	16	1,060
sub-Total Guelph/Eramosa Rural Employment Areas	102	14	116	62	14	1,660
Mapleton						
Industrial Lands in Alma	0	0.7	1	1	7	5
Mapleton Rural Industrial Area	9	0.0	9	5	10	90
Rothsay - Purina Lands	38	0.0	38	1	3	100
South Teviotdale Rural Employment Area	2	0.0	2	2	23	45
Wallenstein Industrial Lands	14	0.0	14	3	12	160
sub-Total Mapleton Rural Employment Areas	63	1	64	12	6	400
Puslinch						
Employment Lands North of McLean Road	20	0.0	20	4	10	200
Kerr Industrial Park	75	1.6	76	29	15	1,140
Maltby Road at Highway 6 (Victoria Park Golf Course)	0	7.7	8	1	3	20
Nicholas Beaver Industrial Park	70	5.7	75	29	15	1,130
sub-Total Puslinch Rural Employment Areas	164	15	179	63	14	2,490
Wellington North						
All Treat Lands	27	0.0	27	1	3	80
Copernicus Lands	3	0.0	3	1	13	45
Riverstown Industrial Park	25	0.4	26	12	10	260
Wellington Road 109 Rural Employment Lands	4	1.8	6	4	15	90
sub-Total Wellington North Rural Employment Areas	61	2	63	18	8	475
Total Rural Employment Areas	400	32	432	157	12	5,080
	93%	7%	100%			

Source: Watson & Associates Economists Ltd.



Figure G-5
Fergus Urban Centre
Employment Areas

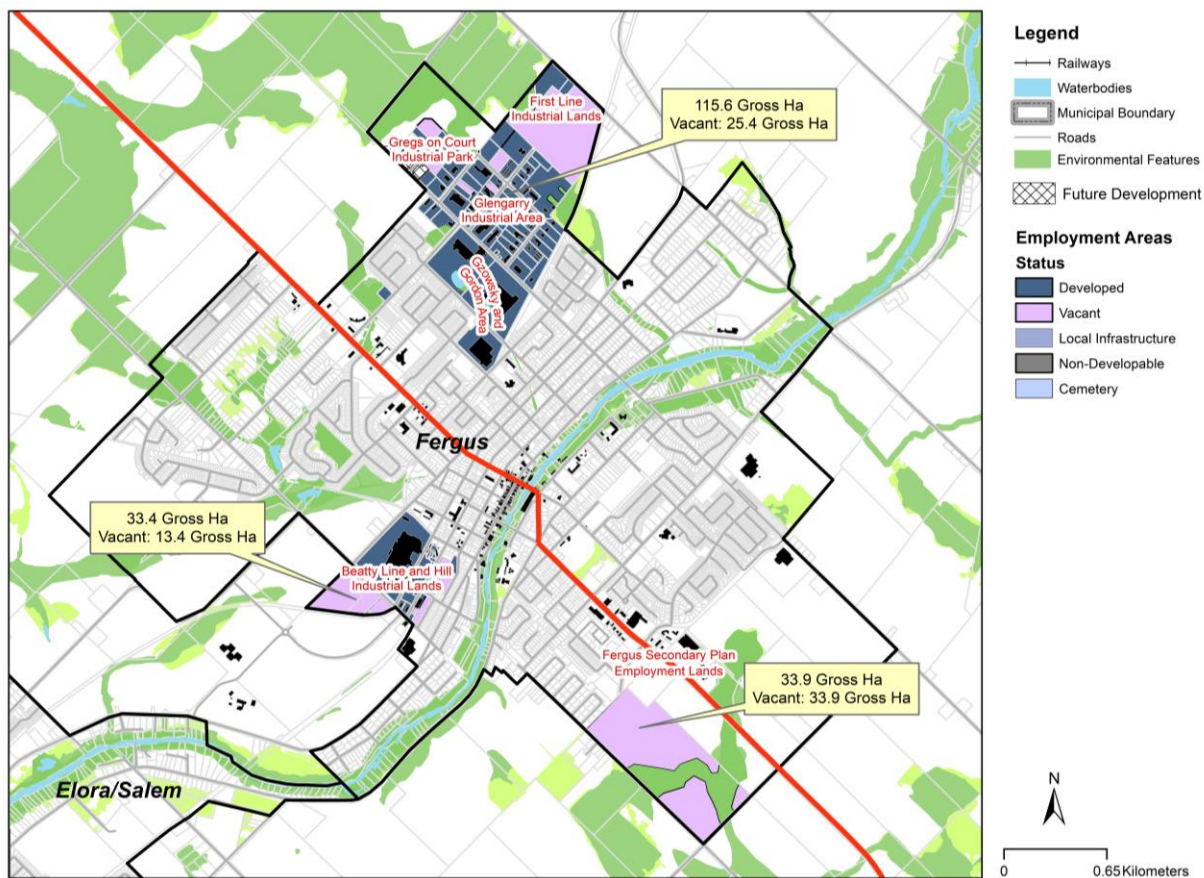




Figure G-6
Elora Urban Centre
Employment Areas

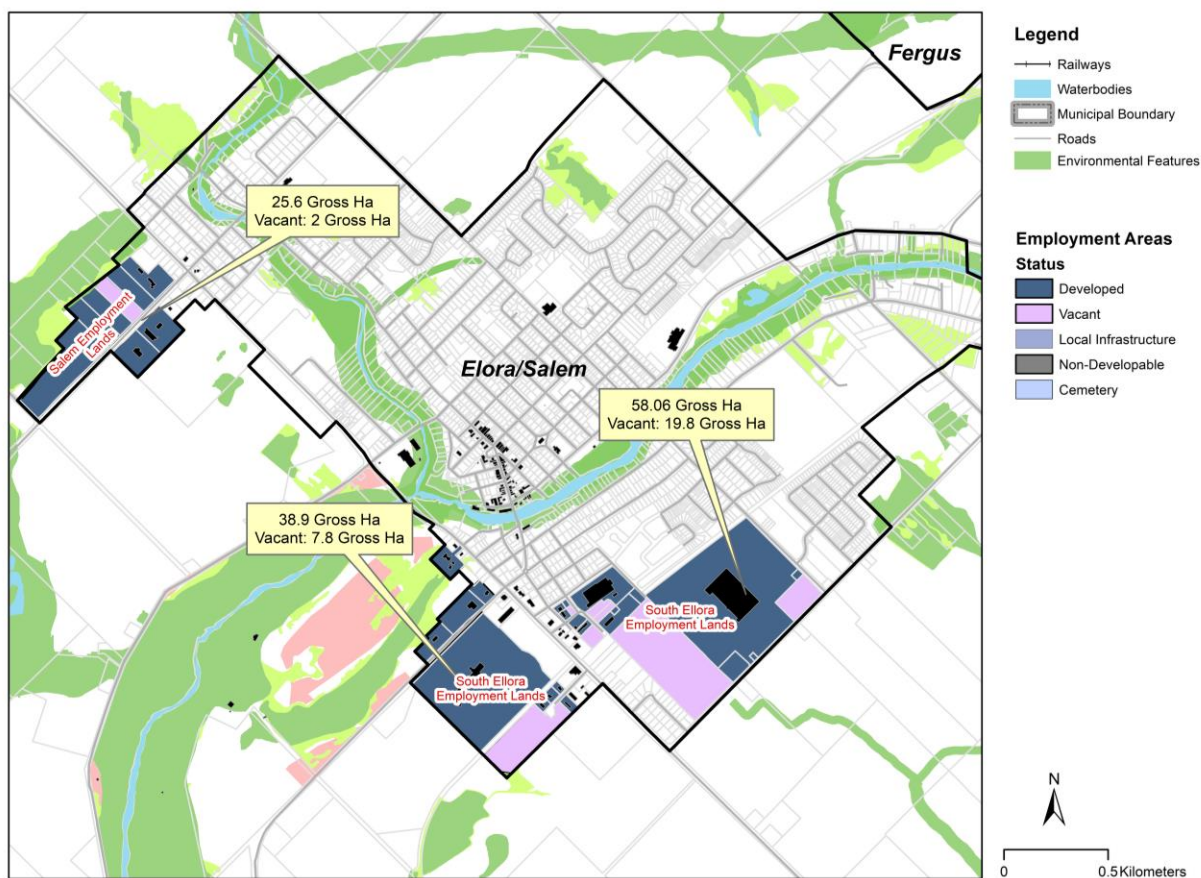




Figure G-7
Hillsburgh Urban Centre
Employment Areas

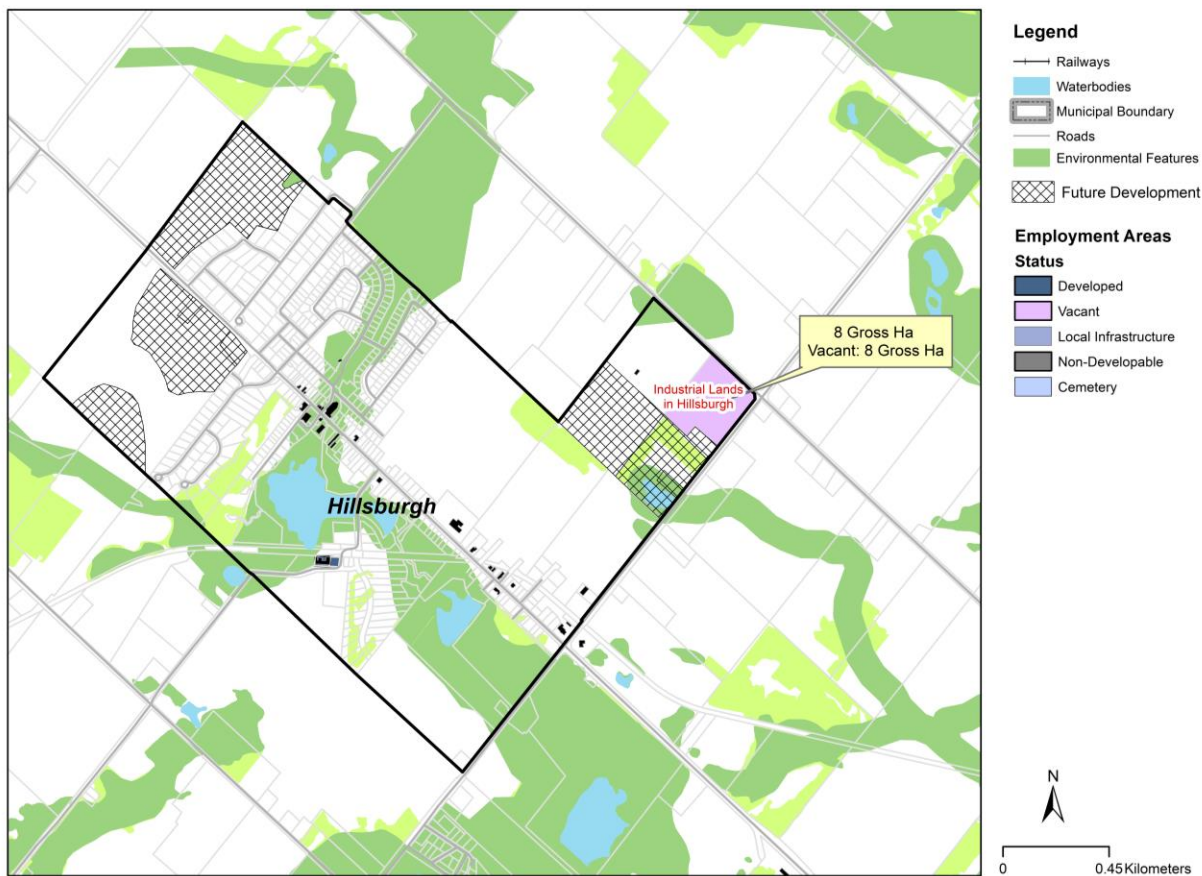




Figure G-8
Erin Village Urban Centre
Employment Areas

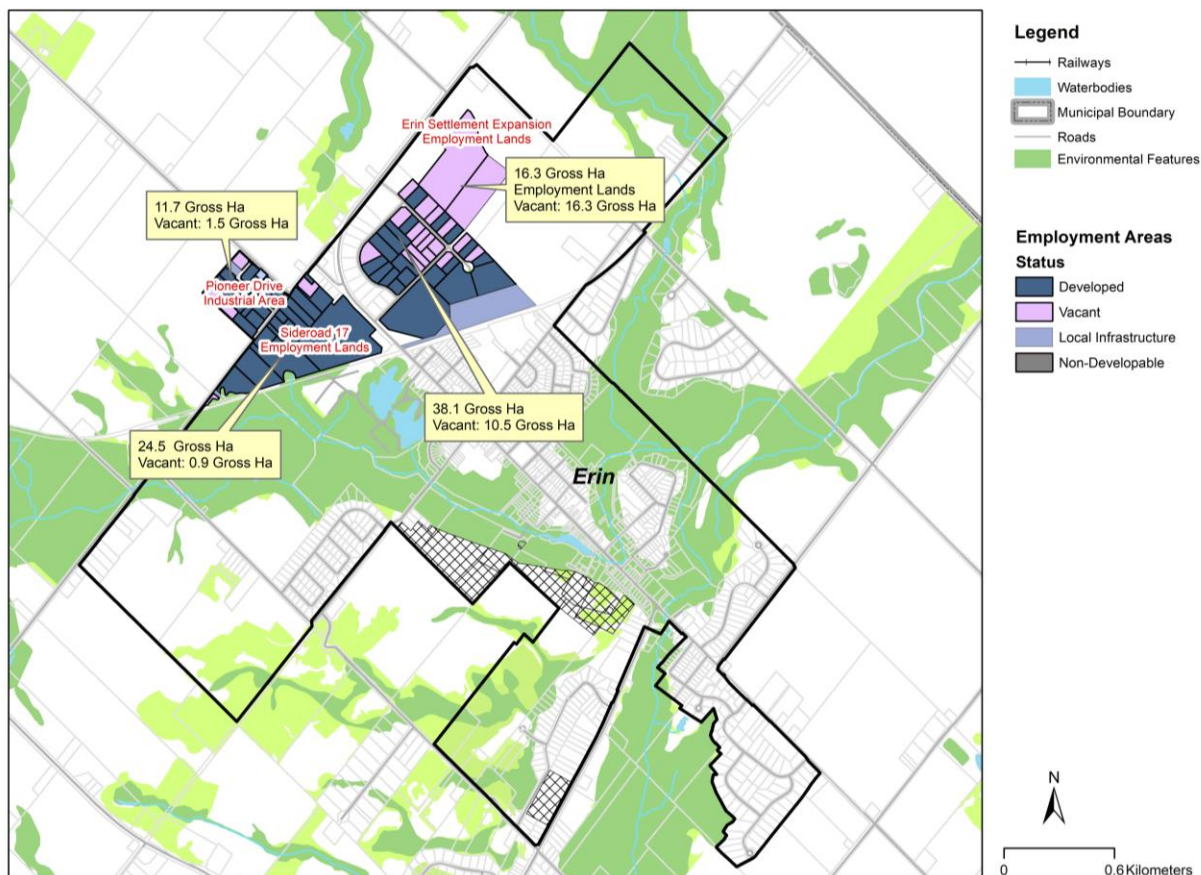




Figure G-9
Mount Forest Urban Centre
Employment Areas

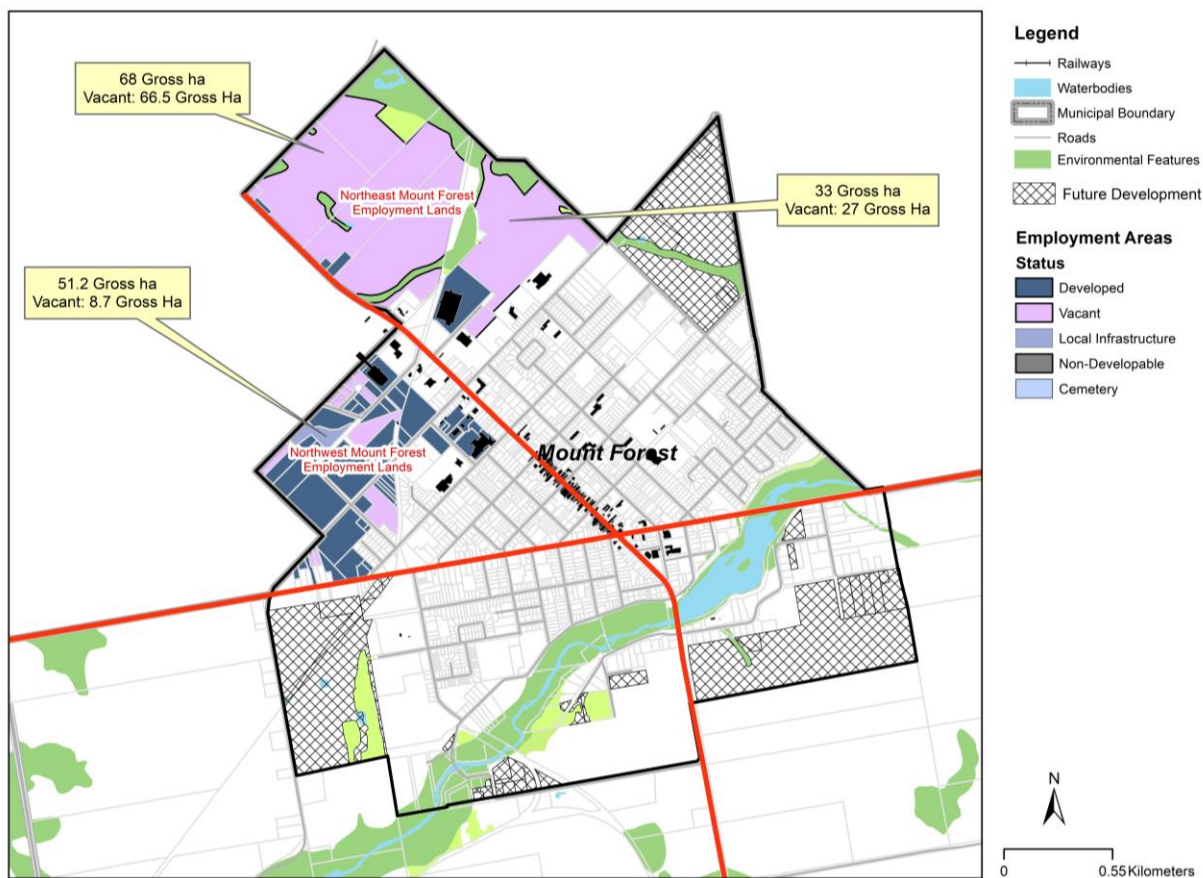




Figure G-10
Arthur Urban Centre
Employment Areas

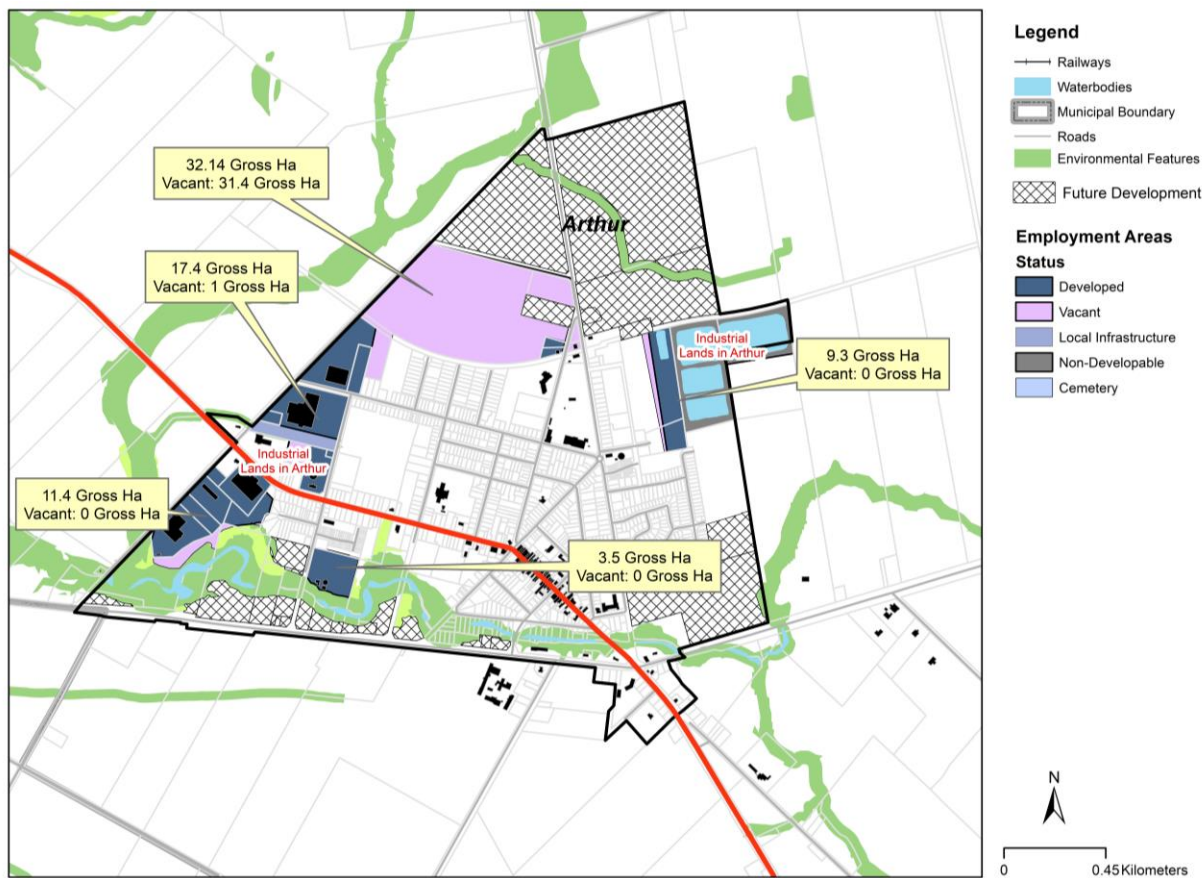




Figure G-11
Drayton Urban Centre
Employment Areas

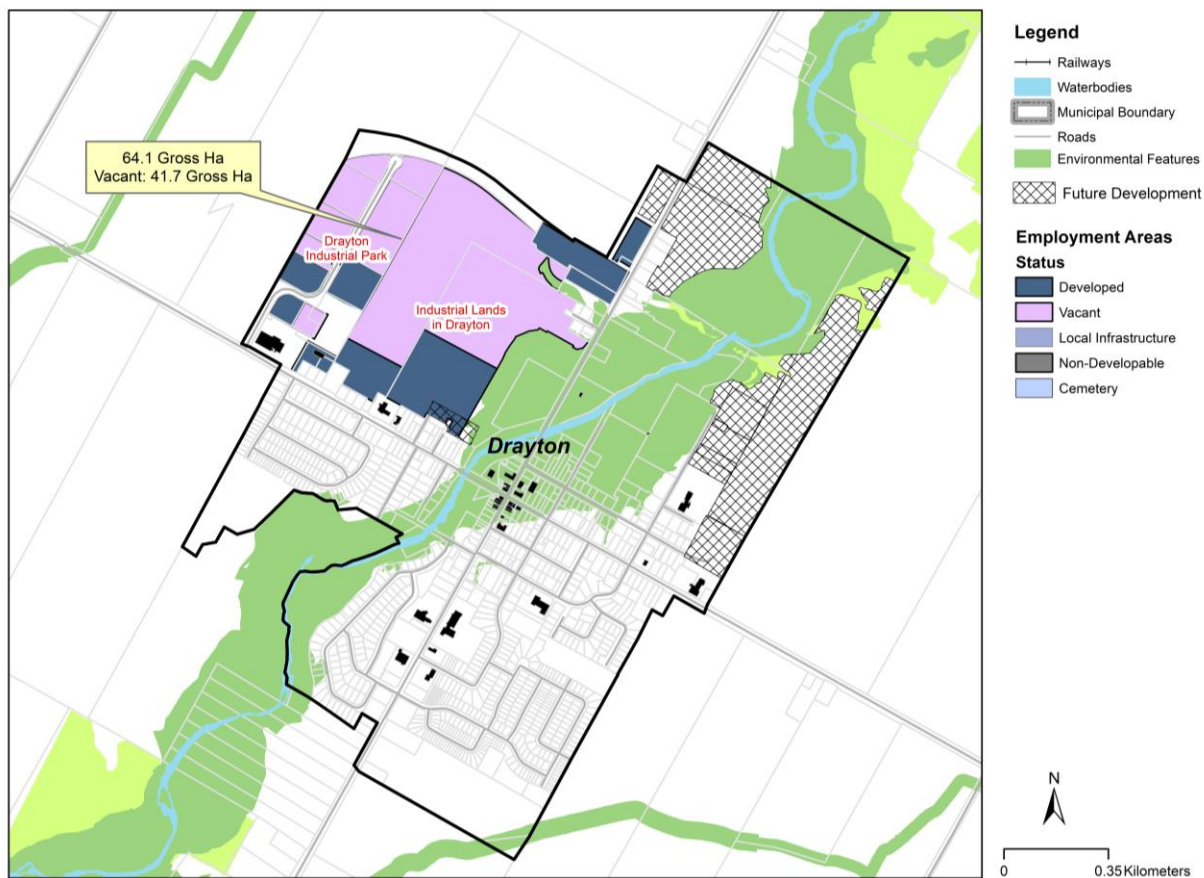




Figure G-12
Moorefield Urban Centre
Employment Areas

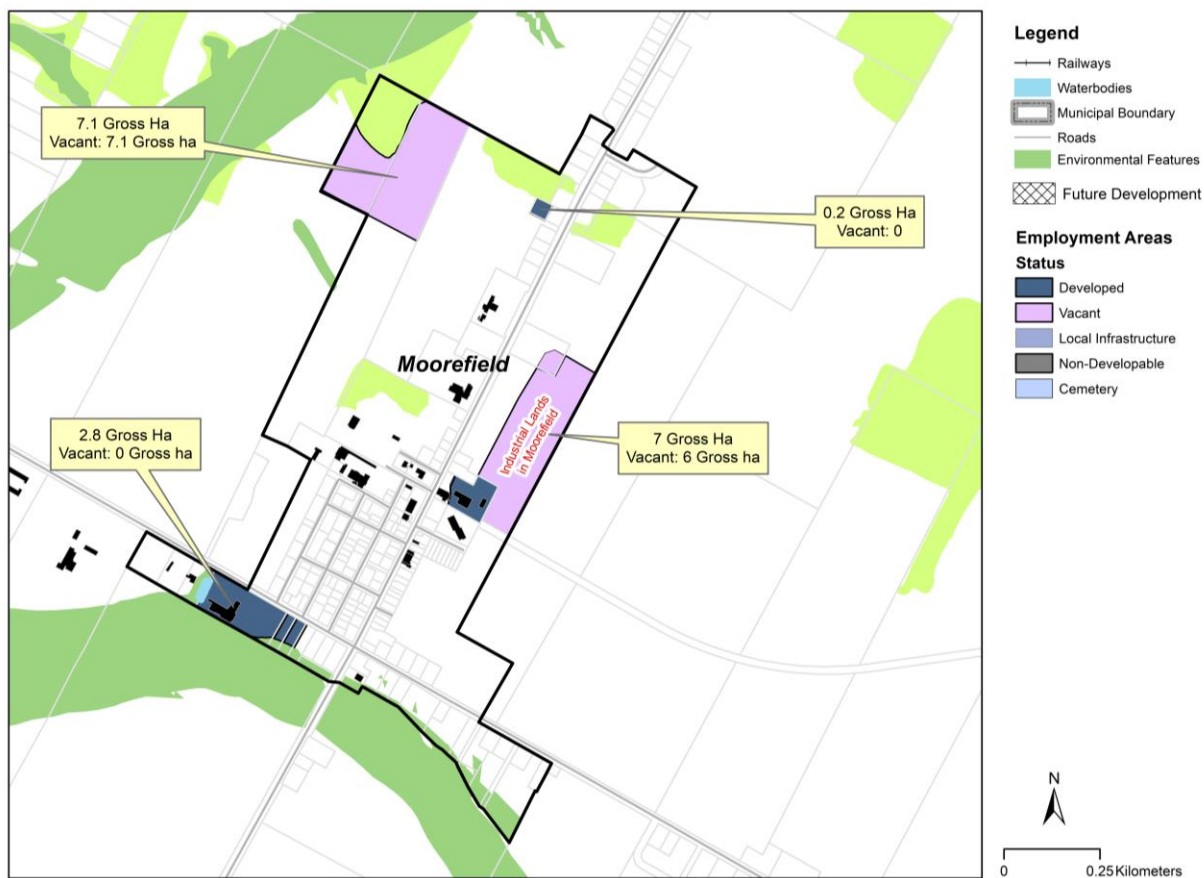




Figure G-13
Clifford Urban Centre
Employment Areas

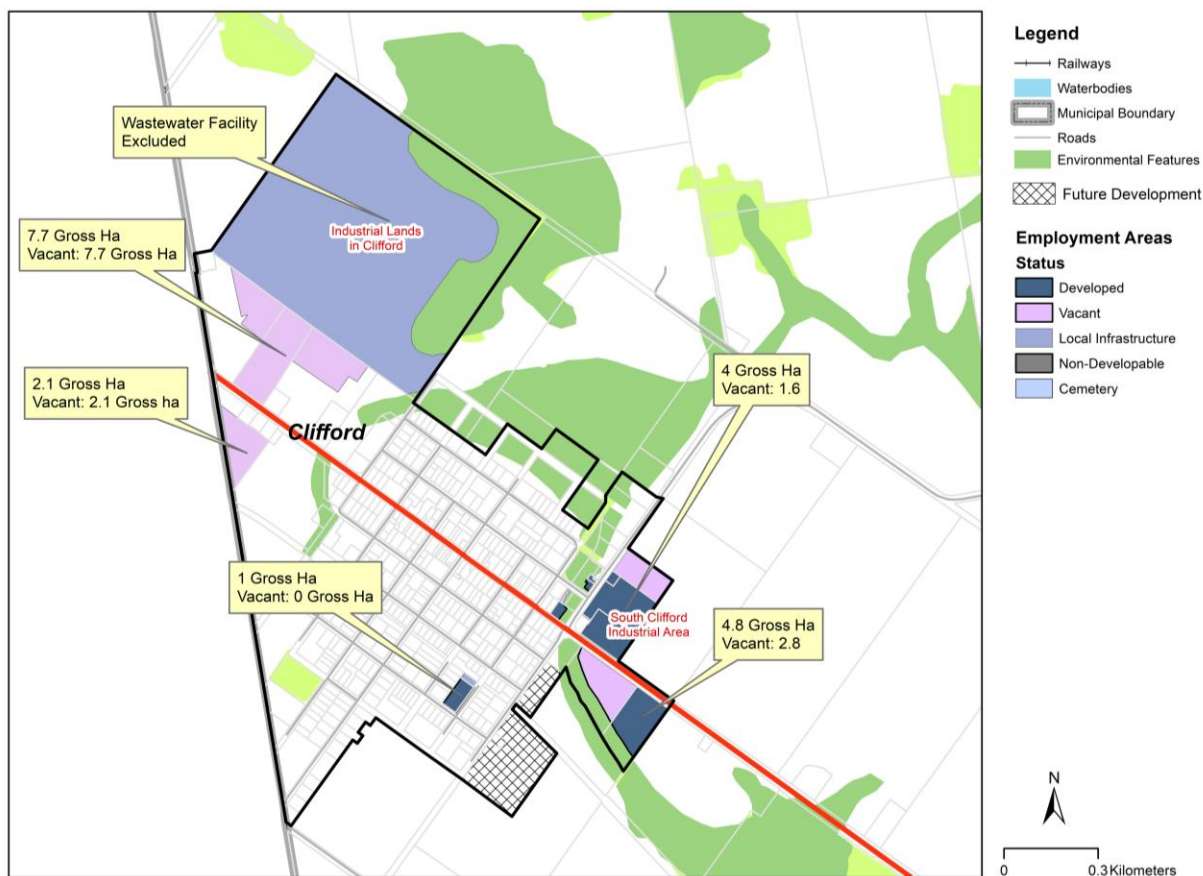




Figure G-14
Palmerston Urban Centre
Employment Areas

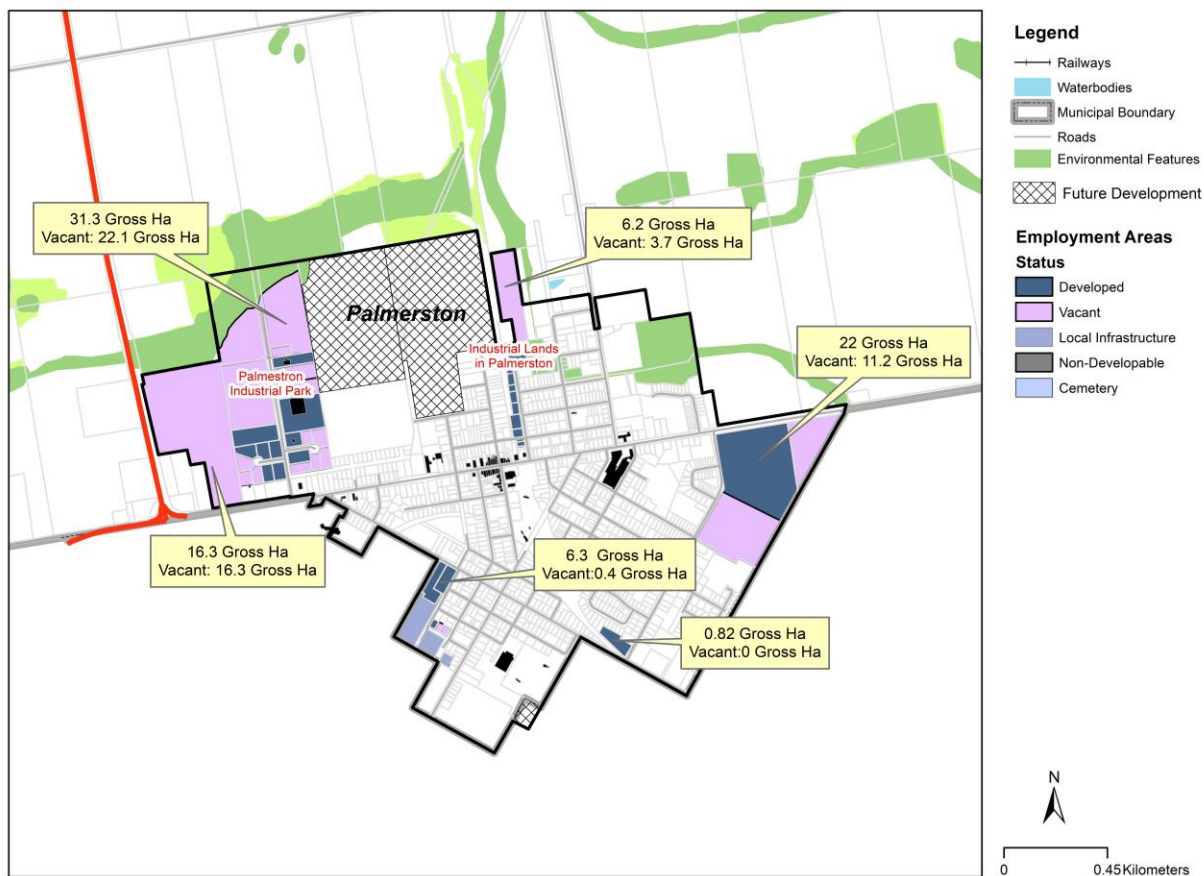




Figure G-15
Harriston Urban Centre
Employment Areas

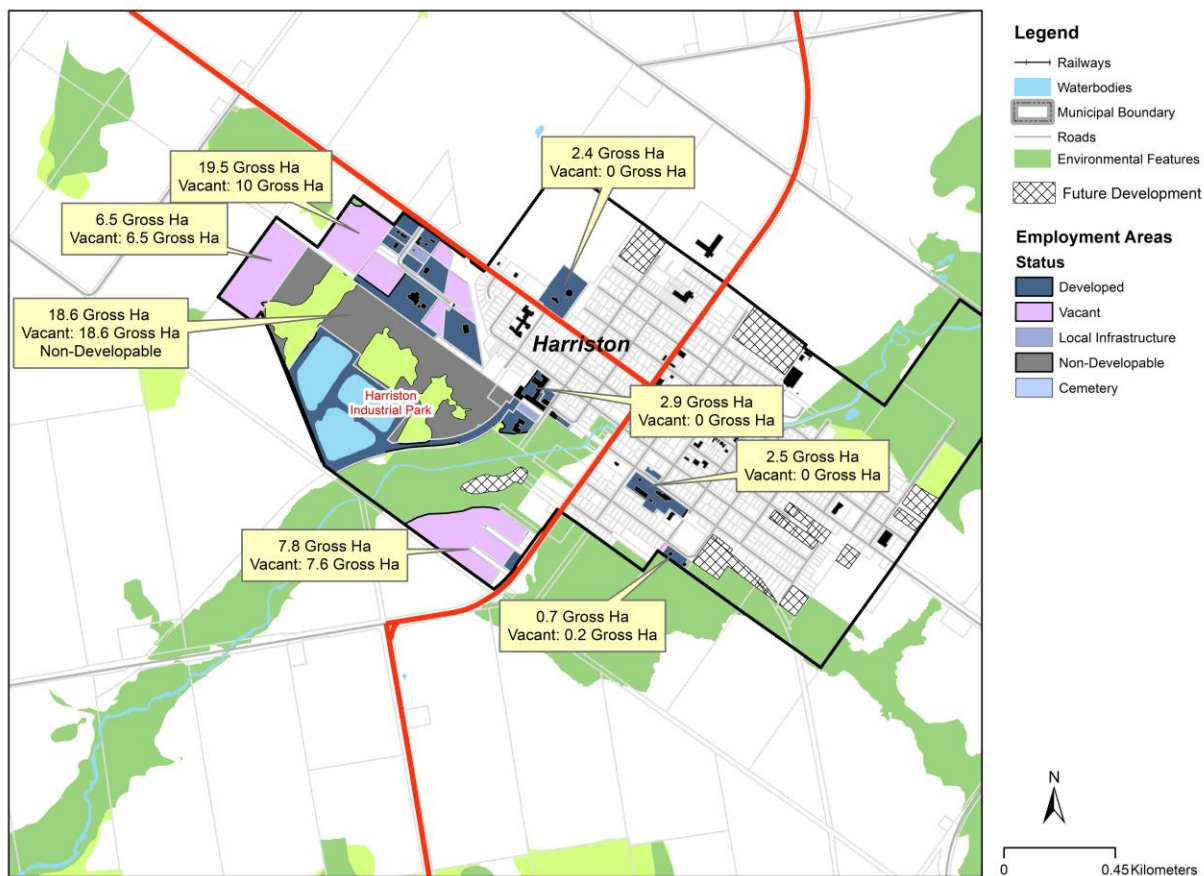




Figure G-16
Puslinch
Rural Employment Areas

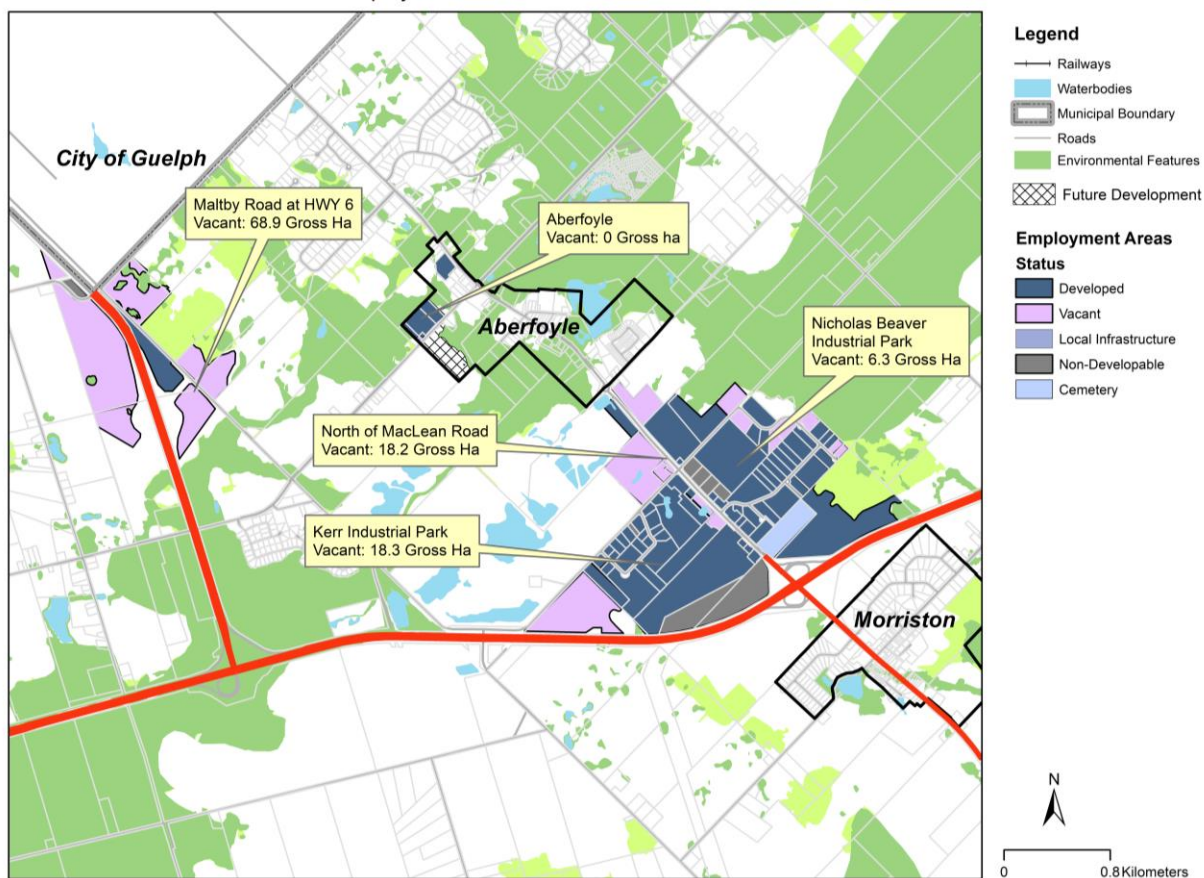




Figure G-17
Guelph-Eramosa
Wellington Rd. 124 Industrial Area
Rural Employment Areas

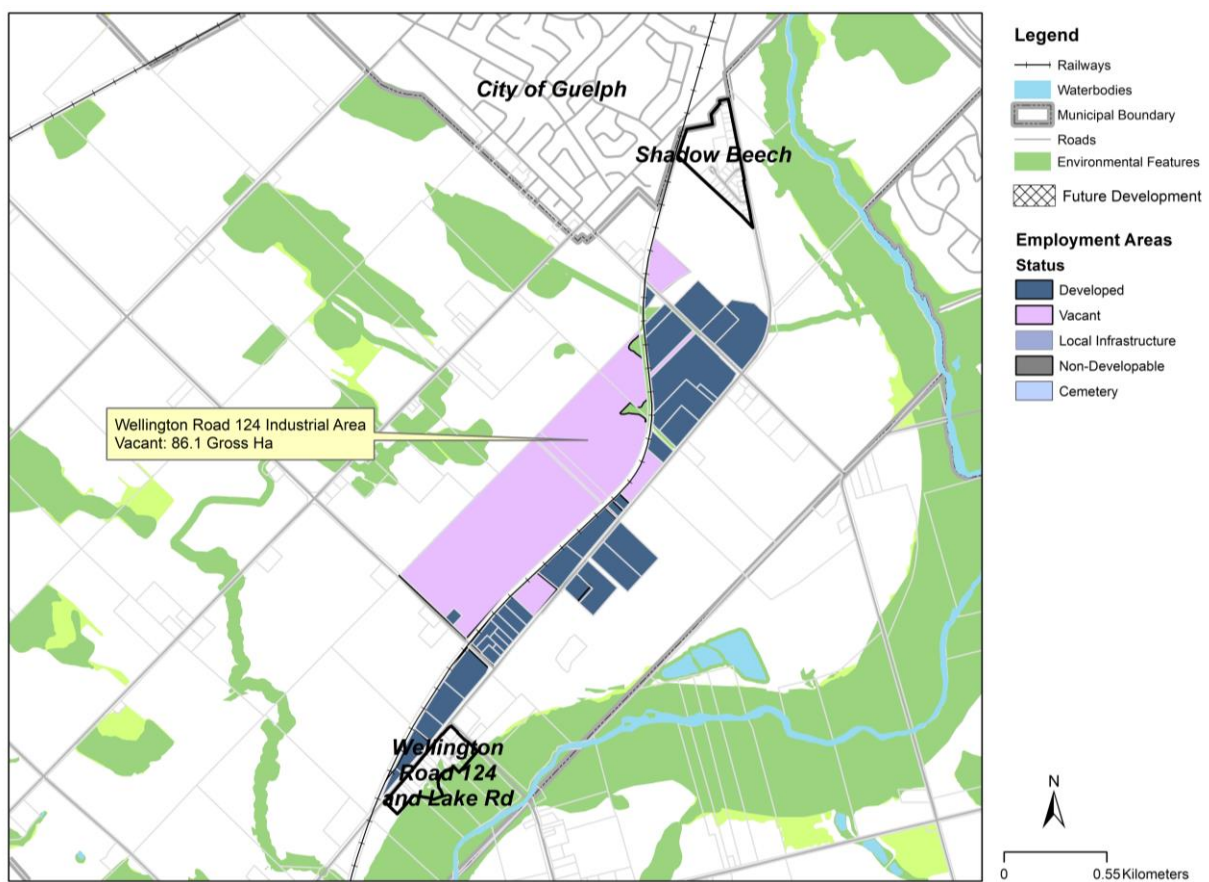




Figure G-18
Guelph-Eramosa
Crewson's Corner Industrial Area
Rural Employment Areas

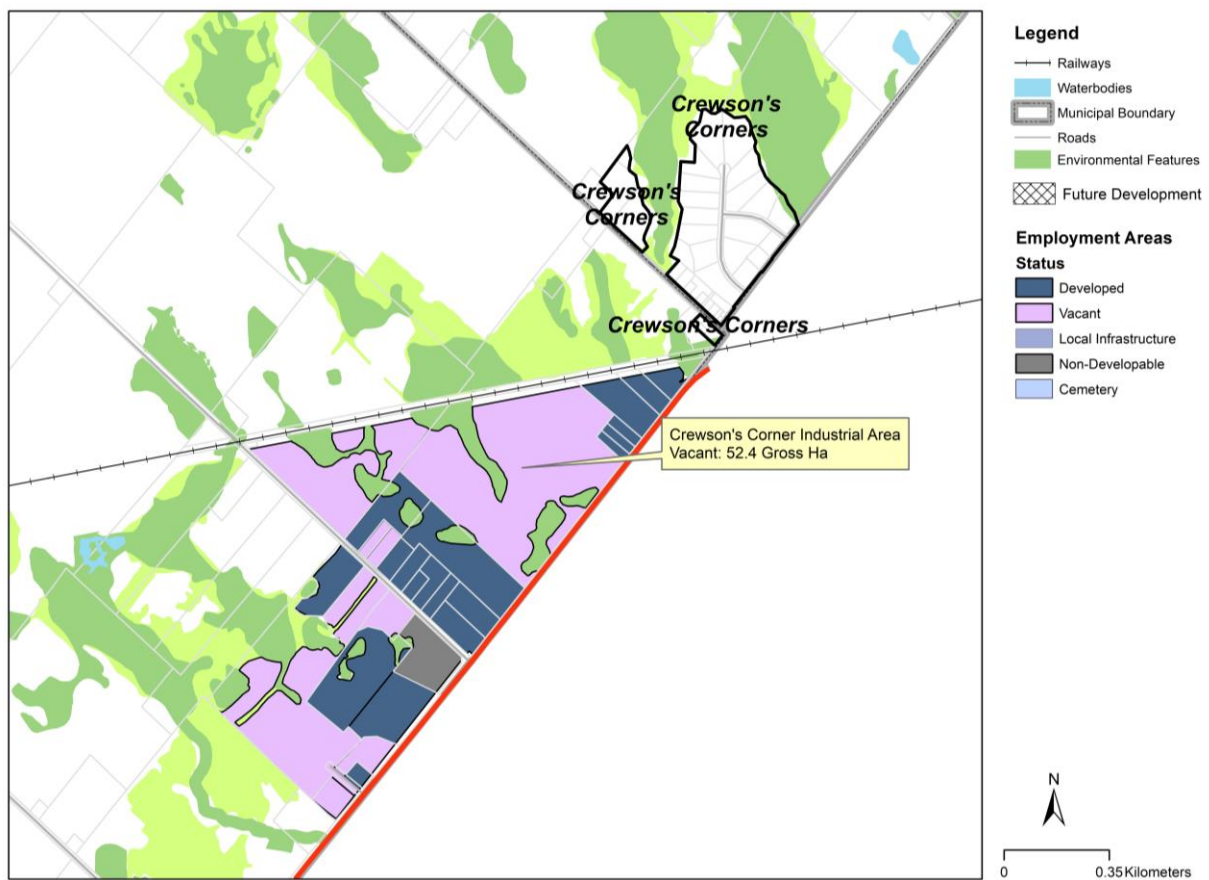
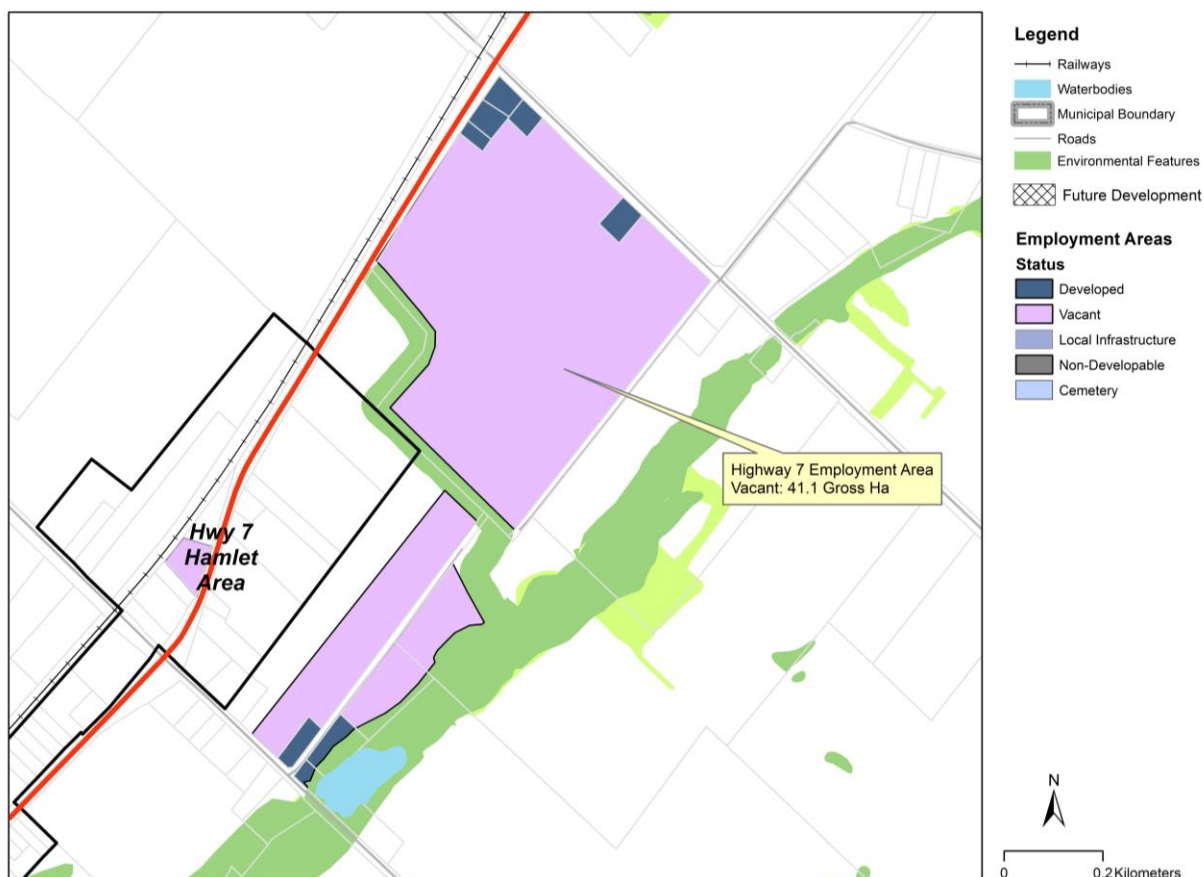




Figure G-19
Guelph-Eramosa
Highway 7 Employment Area
Rural Employment Areas





Appendix H

County of Wellington

Employment Area Conversion

Criteria



County of Wellington

PLANWELL Employment Area Conversion Submission Guide

The County of Wellington is undergoing a Municipal Comprehensive Review (MCR) to fulfil the requirements of the Provincial Growth Plan for the Greater Golden Horseshoe, 2019. As part of the MCR, the County will consider if any Employment Areas warrant conversion to a non – employment use. While the County will consider Employment Area conversions, the overall intent is to protect these areas for employment uses over the long term.

Lands eligible for consideration of an Employment Area conversion include lands within the Urban Industrial designation. Interested parties should review the applicable Official Plan land use schedules to see if their property is within an eligible Employment Area designation. Both the Town of Erin and Township of Centre Wellington have Local Official Plans that are applicable to their urban centres.

Policies and Criteria for Conversion

The Growth Plan provides a policy framework that protects Employment Areas and ensures that there is an adequate supply of land within them to accommodate growth and economic prosperity in the Greater Golden Horseshoe. Therefore, the policies of the Growth Plan only permit conversions of Employment Lands to non-employment uses through an MCR. Employment Area conversion requests will be assessed using Growth Plan and localized criteria outlined in the table below.

Submission Requirements

Submissions for Employment Area conversions will follow the format outlined in this document to ensure a fair and consistent review of each conversion request the County receives. Please file Employment Area conversion requests by **May 3rd, 2021 at 4:00 pm**. These requests will be submitted electronically to planwell@wellington.ca or by mail to the attention of the County of Wellington Planning Department at 74 Woolwich Street Guelph ON, N1H3T9, 3rd Floor, Planning.

All submissions for Employment Area conversions will provide a justification report which contains the following information:

- Property owner name and contact information including e-mail and phone number
- Property address and/or legal description
- A map of the property showing which lands are being requested for conversion
- Existing Official Plan designation
- Existing Zoning for the property
- Size of property in hectares and acres and frontage
- Description of the proposed non-employment use for the site
- Proximity of site to major goods moving facilities (as defined by the Growth Plan)
- The servicing status of the property (indicate if municipal water and/or sanitary sewer is available)
- Details of how the conversion request addresses each of the applicable Growth Plan and localized County criteria detailed in the table below
- Concluding statements which summarize the merits of the application

Next Steps

The information outlined under the submission requirements will provide County Staff with suitable information to begin reviewing the merits of specific conversion requests. Staff will review all requests and provide a report to Planning Committee on the results of our analysis.

Please note that the County is continuing work on other components of the MCR, including an Employment Strategy and Land Needs Assessment. Information from these studies is required prior to any decisions being made on Employment Area conversions. Any recommended conversions will form part of an Official Plan amendment that will be brought forward at the conclusion of the MCR process.

Additional Information

For additional guidance in the preparation of an Employment Area conversion request applicants should review Planning Committee report PD2021-06 for additional details about Employment Area conversions in the context of Wellington County. This information can be found at www.wellington.ca/planwell.

The County of Wellington cannot guarantee the privacy and confidentiality of the contents of a conversion proposal since any or all materials may form part of a report to Planning Committee and Council.

County of Wellington Contacts

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County of Wellington Employment Area Conversion Criteria

Criteria #	Description
Growth Plan Employment Area Conversion Criteria: Request must pass each Growth Plan Criteria in order to proceed to the additional County of Wellington localized criteria.	
1	There is a need for the conversion
2	The lands are not required over the horizon of the Plan (2051) for employment purposes for which they are designated
3	The municipality will maintain sufficient employment lands to accommodate forecasted growth to the horizon of the Growth Plan
4	The proposed use would not adversely affect the overall viability of the employment area.
5	The achievement of the minimum intensification and density targets in the Growth Plan, as well as the other policies of the Growth Plan
6	There are existing or planned infrastructure and public service facilities to accommodate the proposed use(s).
County of Wellington Localized Employment Area Conversion Criteria	
7	<p>The proposed conversion to non-employment uses is compatible within surrounding land uses and/or could be mitigated from potential land use conflict.</p> <p>The conversion has considered the Ministry of Environment and Climate Change Land Use Planning guidelines (D-series guidelines) which provides direction with respect to identifying sensitive uses, appropriate buffers and minimum separation standards within both the rural and urban setting.</p>
8	The site should not be adjacent to or in proximity to major transportation corridors (e.g. highways, goods movement network, cross jurisdictional connections) and goods movement infrastructure (e.g. Airports, intermodal yards, and rail).
9	The site should be located outside or on the fringe of an assembly of Employment Areas.
10	The site offers limited market supply potential for employment area development due to size, configuration, access, physical conditions, servicing constraints etc.
11	Newly designated or developing Employment Areas are generally not considered for conversion requests because they are still establishing their marketability, viability and/or presence.
12	The conversion of the proposed site to non-employment uses would not compromise the County's overall supply of large employment sites.
13	The conversion request is supporting the long-term prosperity of the County through the redevelopment of a brownfield site that is no longer viable for Employment Area purposes but viable for other uses. This site will retain the employment and job potential of the Employment Area or has characteristics of a Strategic Growth Area, including proximity to public service facilities, location along a major arterial and the opportunity to support a range of housing options.
14	The conversion request to a non-employment use would better serve the desires of the community and not conflict with County and/or municipal interests and is supported by member municipal council.
15	The conversion of the site would not present negative cross-jurisdictional impacts that could not be overcome.
16	Conversion of the site to a commercial use will not compromise the planned commercial structure and is adjacent to a highway commercial use.
17	The conversion request demonstrates total job yield of the site can be maintained or improved.