urban Metrics

6585 Highway 6

Land Needs Assessment

Centre Wellington, Ontario

Prepared for **1052367 Ontario Ltd.**

August 13, 2026

urban
Metrics

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August 13, 2026

Mr. James Krouse
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6585 Highway 6
Centre Wellington, ON
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RE: 6585 Highway 6 – Land Needs Assessment (Centre Wellington, Ontario)

urbanMetrics inc. (urbanMetrics) is pleased to submit this Land Needs Assessment (LNA) in support of bringing your property, an approximately 29.3-hectare parcel (the "Subject Site"), into the Fergus Settlement Area boundary.

The proposed development concept includes a variety of residential, institutional, and other land uses as part of the extension of the Fergus Community Area.

As part of the municipal approval process, the Township requires an LNA to demonstrate that the conversion is both market-warranted and supports policy-based need to achieve the Township's forecast housing requirements. This report demonstrates that the Subject Site is required to contribute to the Township's long-term community-area land needs. Based on prevailing and anticipated market conditions, Centre Wellington has insufficient community land area to accommodate the projected growth targets to 2051.

Any questions about the contents of this report can be directed to the undersigned.

Respectfully Submitted,

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Executive Summary

- The landowner is proposing an amendment to the County Official Plan and Local Official Plan to bring an approximately 29.3-hectare parcel into the Fergus Settlement Area and develop a 701-unit residential community, including a future school site, parkland, and natural heritage areas.
- urbanMetrics Inc. was retained by 1052367 Ontario Ltd., on behalf of the owner, to prepare this Land Needs Assessment (LNA) demonstrating that a proposed Settlement Area Boundary Expansion (SABE) is warranted to add the required lands needed to meet Centre Wellington's projected housing needs to 2051.
- This assessment follows the Province's Proposed Projection Methodology Guideline (PPMG, March 30, 2026), translating the Ontario Ministry of Finance ("MoF") population projections for Wellington Census Division into municipal household demand and greenfield land requirements.
- The MoF projections for Wellington Census Division direct Centre Wellington and the other lower-tier municipalities to plan for a higher level of population growth than previously anticipated.
- This LNA demonstrates that, applying the County and Township's own population projection of 58,200 residents in 2051, additional Community Area Land is required to meet projected unit demand over the period.
- Applying headship rates and unit type preferences from the 2021 Census, adjusted for market trends and other factors, the Township is estimated to require 11,031 new units to meet demand for the 2021 to 2051 period.
- After accounting for completions since 2021, the existing development pipeline, and intensification within the Built-Up Area, residual greenfield demand is estimated at approximately 6,971 units, further equating to an estimated land need of approximately 581.1 gross hectares.
- Available designated greenfield land is estimated at between 390.6 hectares and 410.1 hectares, leaving a deficit of between 171.0 and 190.5 hectares to support growth to the 2051 time horizon.
- The Subject Site is a logical, compact, and contiguous extension of the Fergus Settlement Area that can be efficiently serviced, and preserves on-site natural heritage features, supporting a SABE consistent with PPS 2024 and applicable County and Township policy.

1 Introduction

urbanMetrics Inc. was retained by 1052367 Ontario Ltd., to provide a Land Needs Assessment ("LNA") in support of a Settlement Area Boundary Expansion ("SABE") in the Community of Fergus, Township of Centre Wellington (the "Township" or "Centre Wellington").1052367 Ontario Ltd. is-the owner of the lands generally comprised of: part of Lot 17 Concession 15 between Highway 6 and Beatty Line, known municipally as 6585 Highway 6 ("the Subject Site") that are proposed for inclusion within the Fergus Settlement Area Boundary.

This LNA is provided to evaluate the need for additional community area lands in the Township as required by the Township of Centre Wellington as part of a privately initiated request to expand the Settlement Area Boundary.

1.1 Study Purpose

According to the Provincial Planning Statement 2024 ("PPS 2024"), an application for a privately initiated SABE can be permitted if the proponent demonstrates a need for additional land to accommodate projected residential growth.

This required justification is set out in policies established by the Province of Ontario, the Wellington County Official Plan ("County OP"), and the Township of Centre Wellington Official Plan ("Township OP").[1]

The purpose of this study is to evaluate whether the inclusion and development of the Subject Site into the Fergus Settlement Area Boundary is appropriate and determine if an increase in residential unit supply is warranted as part of a proposed SABE to meet housing forecast targets for the year 2051.

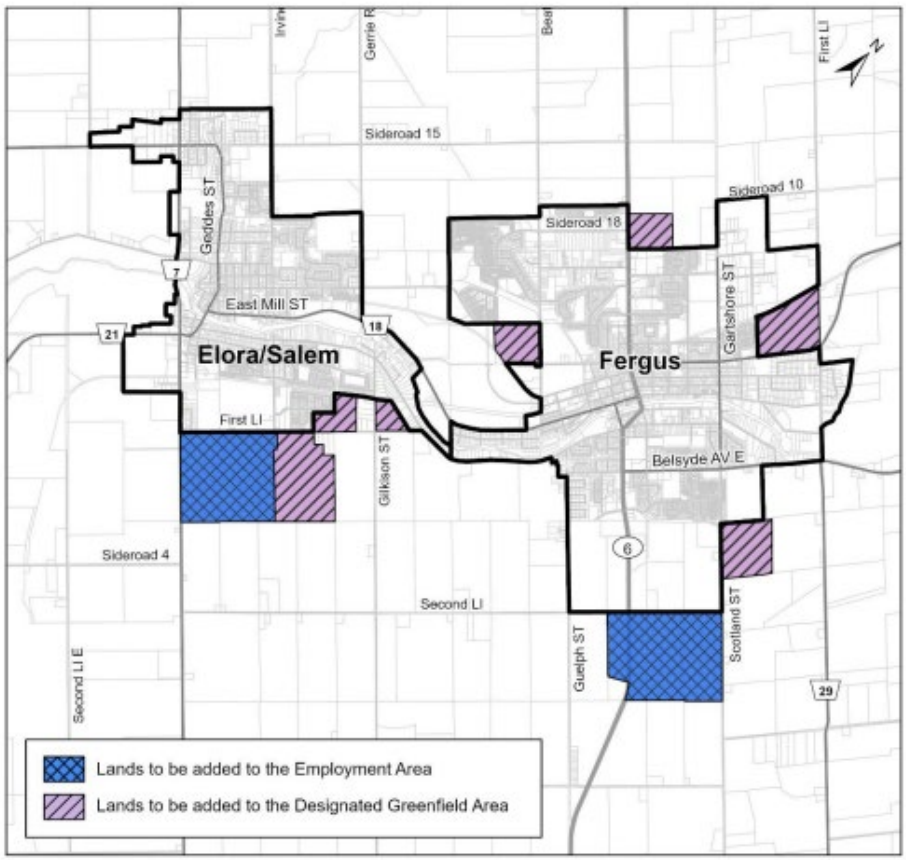
1.2 Policy Context

The boundaries of the Settlement Areas within Centre Wellington have been expanded multiple times in recent years as growth projections and applicable provincial policy have shifted. Most recently, Wellington County Official Plan Amendment 126 ("OPA 126") added additional community area and employment area lands to the Elora/Salem and Fergus Settlement Area Boundaries, as shown in Figure 1-1. These lands were calculated based on a people and jobs per hectare

[1] Appendix 2

target and, as such, include consideration for non-residential land uses such as institutional and local commercial uses, alongside infrastructure rights of way and other non-developable areas.

Figure 1-1: OPA 126 Urban Boundary Expansion



Source: Schedule A-1 OPA 126 (April 24, 2025)

The background work undertaken throughout the OPA 126 process denoted priority to lands brought forward for consideration for a boundary expansion that were immediately adjacent to the existing Settlement Area Boundary and which generally supported the efficient delivery and operation of municipal infrastructure. These new lands also mitigated fragmentation of the agricultural land base, aligning with technical background studies demonstrating compliance via minimum distance separation ("MDS") requirements and the findings of agricultural impact assessments ("AIA").

Wellington County Official Plan Amendment 120 ("OPA 120") provides additional context as it establishes the baseline growth projections that underpin the

County's Official Plan. Table 2 of OPA 120 sets out Centre Wellington's 2051 population estimate of 58,200 residents.

1.3 Methodology

At the time of writing, there are two relevant provincial methodological guidelines for projecting municipal land needs: The 1995 Projection Methodology Guideline ("1995 Methodology") and the 2026 Proposed Projection Methodology Guideline ("PPMG").

While these guidelines are separated by more than 30 years, they share many similarities and several differences. Most notably, the 1995 Methodology was approved in the year of its release, whereas the PPMG is still subject to full approval by the province after multiple consultations via the Environmental Registry of Ontario in 2025 and 2026 and last released on March 30, 2026.

In practice, the most significant difference is that the 1995 Methodology translates projected population into housing units at the Census Division ("CD") or Upper Tier Municipal level, then allocates those units to the Census Subdivision ("CSD") level based on several economic, policy, and geographical factors. The PPMG allocates population from the Census Division level to the CSD level before this population is translated into housing units.

The PPMG is intended to standardize the process by which Ontario municipalities convert Ministry of Finance ("MOF") population projections into municipal-level population forecasts, housing needs assessments, and ultimately land needs calculations consistent with the Provincial Planning Statement 2024 ("PPS 2024").

Consistency with the final approved version of the projection guideline will be important in evaluating privately initiated settlement area boundary expansion applications, as it establishes that the identified land need is derived from a methodology aligned with the current provincial policy framework. It should also be noted that both methodological guidelines are intended to be implemented as frameworks supported by supplementary analysis and professional opinion.

This urbanMetrics Land Needs Assessment follows the framework established by the Province's Proposed Projection Methodology Guideline ("PPMG").

At the time of undertaking this report, the PPMG is still a draft document, and revisions to this analysis may be applicable in the future should the methodology in the final version of the guidelines differ materially from the current draft PPMG.

The Draft PPMG Framework & urbanMetrics' LNA Methodology

The PPMG outlines four sequential steps that correspond to the structure of this report. The subsequent steps outlined in the PPMG relate to an Employment Area Assessment, which is not included in the proposed development and, as such, is not within the scope of this study. The methodology based on the PPMG's guidance and applied herein can generally be summarized as follows:

- First, the MoF's population projections for the applicable Census Division (CD), in this case, Wellington CD, are identified and used as the starting point for all subsequent analysis.
- Second, those CD-level projections are disaggregated to the Census Subdivision (CSD), or municipal level, using at least two allocation methods: a population-share method and a growth-share method. The higher of the two results is used as the municipal projection input.
- Third, age-specific headship rates derived from the 2021 Census are applied to the age-cohort population projections to generate total household demand by dwelling type.
- Finally, housing unit demand is converted to land area requirements using unit-per-hectare density assumptions, grossed up to account for internal roads, stormwater management, and other non-developable features in future subdivision plans.
- These four land-related assumptions are then used to arrive at a gross developable land need, which is compared with the estimated supply of gross developable community area land to arrive at a surplus or deficit.

These steps form the basis of this Land Needs Assessment.

1.4 The Proposed Development Concept

The development concept proposed by the applicant would introduce approximately 29.3 hectares of new land into the Fergus Settlement Area boundary. This includes approximately 5 additional hectares for a future Secondary School and 3 hectares of NHS land. Subtracting the NHS block; the total area proposed for inclusion is approximately 26.3 hectares.[2]

[2] Exclusive of the natural heritage system lands (3.01 hectares).

A more detailed breakdown of the proposed land uses is shown in Figure 1-2 on the next page.

Figure 1-2: Subject Site Proposed Land Use Breakdown

Category	Type	Hectares
Residential	Single-Family & Towns	4.81
Residential	Street & Stacked Towns	4.21
Residential	Stacked Town/Low Rise Apartment	2.01
Residential	Apartments	2.47
Mixed Use	Mixed Use/Commercial	1.60
Other	SWM	1.21
Other	Walking Path	0.09
Other	Roads	4.09
Other	Park	0.82
Institutional	School	4.96
Gross Developable Subtotal		26.3
NHS	Natural Heritage	3.01
Total		29.3

SOURCE: 1052367 Ontario Ltd. Concept Plan, August 2026. Numbers may not sum due to rounding.

The approximately 26.3 gross developable hectares of land will accommodate an estimated 701 proposed units consisting of: 151 single-family & town units, 191 street towns, 101 stacked towns/low-rise apartment units, 204 apartment units, and 54 units in the mixed-use block. The breakdown of these units and their associated estimated future target population is shown in Figure 1-3. Using the persons per unit type ratios from the Township's 2025 Development Charges Background Study, the inclusion of the Subject Site could support a future population of approximately 1,600 residents. The corresponding proposed site concept plan is shown in Figure 1-4 on the next page.

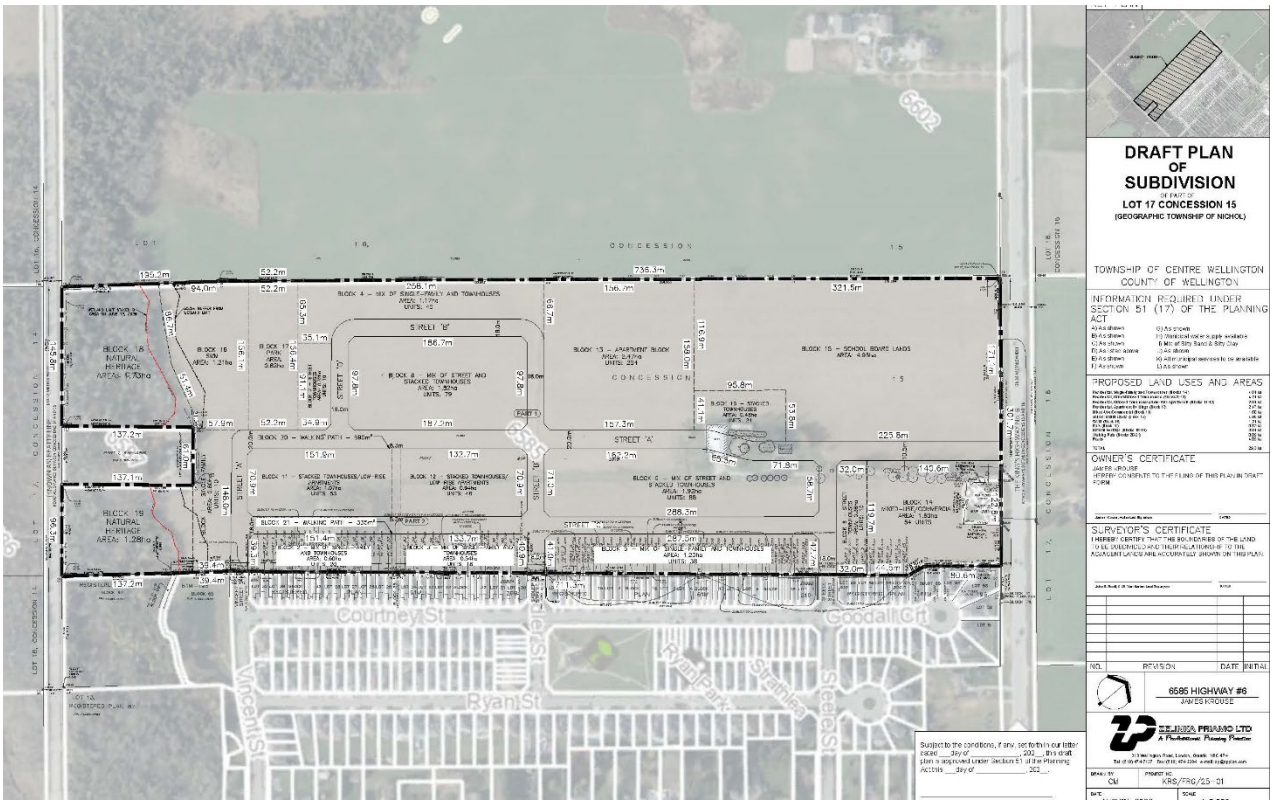
It is important to note that the concept plan referenced herein is provided as illustrative in nature and represents one potential development scenario for the Subject Site. This concept has been prepared for analytical purposes only and should not be interpreted as a finalized development plan for the Subject Site. Rather, it is intended to demonstrate the Site's potential to accommodate a diverse mix of housing typologies and programming, to support future residential supply growth and the achievement of a complete community aligning to the Township's and County's OP policies.

Figure 1-3: Proposed Unit Counts & Potential Population

Unit Type	Units	PPU	Population
Single-Family & Townhouses	151 units	2.92	441
Street Townhouses	191 units	2.38	455
Stacked Townhouses & Low-Rise Apartments	101 units	2.38	240
Apartment Buildings	204 units	1.8	367
Mixed Use/Commercial	54 units	1.8	97
Total	701 units		1,600

SOURCE: 1052367 Ontario Ltd., Concept Plan, August 2026; Persons per unit ratios from Centre Wellington DCBS (December 19, 2025).

Figure 1-4: Concept Plan



SOURCE: 1052367 Ontario Ltd., Concept Plan, August 2026

2 Population Projection

2.1 Ministry of Finance Forecast

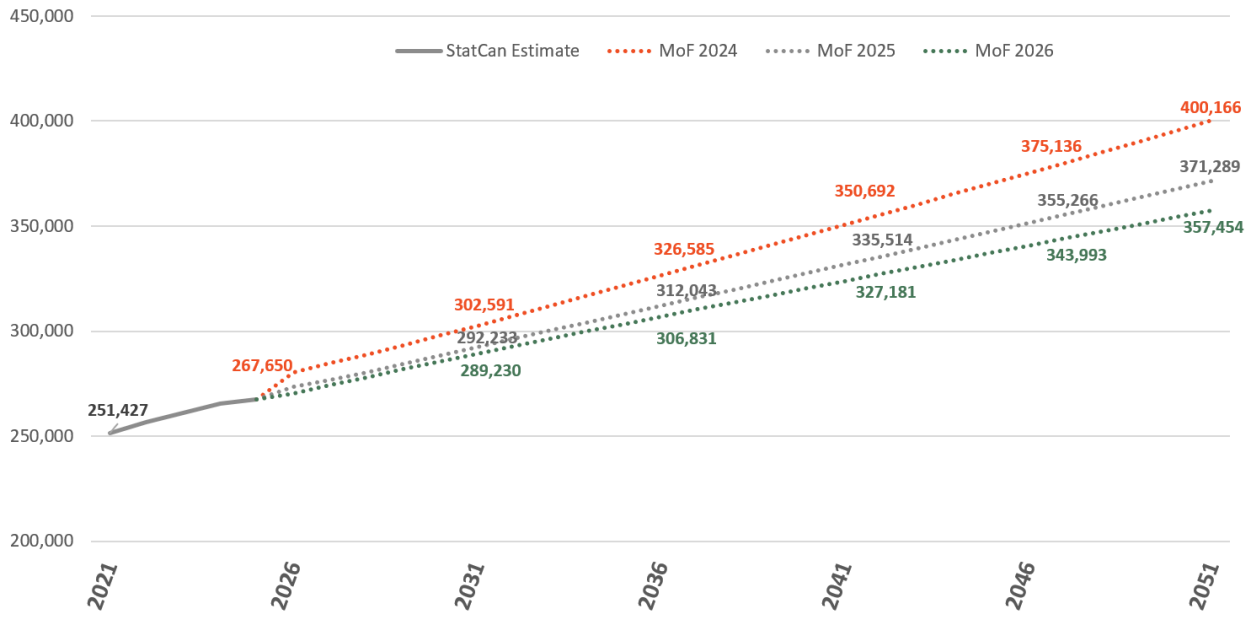
Statistics Canada estimates the population of the Wellington Census Division (CD) at approximately 267,650 in 2025; this serves as the baseline population estimate for the CD. The future population is estimated by projections prepared annually by the MoF. The PPS 2024 directs planning authorities to use these MoF projections as the basis for the planning of long-term growth. Three annual projections for the Census Division have been released since the PPS 2024 came into force. As with many of the policies in the PPS 2024, these population projections represent minimum standards.

These three projections vary based on a range of factors, including macroeconomic conditions, demographics, and immigration. Considering recent broader shifts in macroeconomic trends, as well as modifications in federal and provincial policy directives between 2024 and 2026, this has resulted in significant variation among the three projections released thus far. Given this variation, and the absence of clear direction in the PPS as to which year to use, urbanMetrics considers it necessary to consider all three forecasts in assessing population outcomes for the 2051-time horizon.

Figure 2-1 to follow illustrates the variability amongst the last three editions of population projections for the Wellington CD relative to a time horizon for the year 2051. Amongst these three editions, population levels by 2051 range from a low target of 357,454 people to a high target of 400,166 people, depending on which edition is used. As a result, total growth projected to the 2051 horizon and calculated relative to a 2025 Statistics Canada population estimate of approximately 267,650, ranges between approximately 89,000 and 132,500 people (Figure 2-1) over a 27-year interval.

Moving forward in this report, uMi assumes the 2025 projection scenario of a total 2051 population in the Wellington CD of 371,289 (rounded to 371,300), serving as a de facto “medium” scenario between the 2024 and 2026 projections, as the reference scenario used herein.

Figure 2-1: Census Division Population Projections



SOURCE: Statistics Canada 17-10-0152-01 (2021-2025), and Ministry of Finance Population Projections

2.2 Past Growth in Wellington Census Division

As stated, applying the 2025 MoF projection of 371,289 residents in 2051 (rounded to 371,300 people) results in growth of:

- approximately 119,862 residents (rounded to 119,900 people) from a 2021 Census population level of 251,427 people and
- 103,639 residents (rounded to 103,600 people) from the 2025 Stats Can population estimate (267,650 people).

To allocate projected total growth between 2025 and 2051 in the Wellington CD (103,600 people) across its constituent Census Subdivisions (CSDs), we have evaluated historical population growth trends. Figure 2-2 shows historical population growth in the Wellington CD's eight constituent CSDs.

As shown in Figure 2-2, overall the CD has grown by approximately 18.7% from 2015 to 2025, led primarily by the City of Guelph, Centre Wellington, and Wellington North. Centre Wellington's population increased at the highest relative rate of all municipalities, by approximately 21.7%, from 28,412 to 34,565, an absolute increase of 6,153 people.

Figure 2-2: Historical Population Growth in Wellington CD - by CSD (2015-2025)

Municipality	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Growth
Guelph	132,822	136,540	138,873	141,703	144,765	148,246	150,277	153,216	156,386	159,396	160,760	21.0%
Centre Wellington	**28,412**	**29,017**	**29,791**	**30,617**	**31,063**	**31,514**	**32,325**	**33,098**	**33,555**	**34,139**	**34,565**	**21.7%**
Guelph/Eramosa	13,656	13,063	13,845	14,018	14,042	14,175	14,461	14,832	14,712	14,879	14,870	8.9%
Wellington North	12,102	12,247	12,368	12,490	12,630	12,668	12,922	13,285	13,781	13,952	14,407	19.0%
Erin	11,407	11,771	11,879	12,079	12,274	12,358	12,439	12,659	12,634	12,783	12,924	13.3%
Mapleton	10,780	10,819	10,990	11,141	11,287	11,268	11,302	11,538	11,587	11,577	11,518	6.8%
Minto	8,812	8,906	9,133	9,257	9,303	9,369	9,469	9,643	9,825	9,980	10,029	13.8%
Puslinch	7,541	7,514	7,526	7,764	7,910	8,116	8,232	8,483	8,709	8,718	8,577	13.7%
Total	225,532	229,877	234,405	239,069	243,274	247,714	251,427	256,754	261,189	265,424	267,650	18.7%

SOURCE: Statistics Canada. Table 17-10-0155-01

2.3 Growth Allocation

As outlined in Section 1.3, the PPMG outlines two approaches to allocating population growth, a population share method and a growth share method, identified herein as Method A and Method B, respectively. These two methods are contrasted in the following subsections.

Method A: Population Share

Figure 2-3 summarizes each local municipality's annual share of the Wellington CD's population over the 2015 to 2025 period. As shown, the City of Guelph and the Township of Centre Wellington remain the most populous CSDs in Wellington CD, together accounting for approximately 72.4% of the 2025 population, with Centre Wellington averaging 12.8% of the CD's population over the period.

Figure 2-3: Annual Share of Wellington CD Population (2015-2025)

Municipality	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Average
Guelph	58.9%	59.4%	59.2%	59.3%	59.5%	59.8%	59.8%	59.7%	59.9%	60.1%	60.1%	59.6%
Centre Wellington	**12.6%**	**12.6%**	**12.7%**	**12.8%**	**12.8%**	**12.7%**	**12.9%**	**12.9%**	**12.8%**	**12.9%**	**12.9%**	**12.8%**
Guelph/Eramosa	6.1%	5.7%	5.9%	5.9%	5.8%	5.7%	5.8%	5.8%	5.6%	5.6%	5.6%	5.8%
Wellington North	5.4%	5.3%	5.3%	5.2%	5.2%	5.1%	5.1%	5.2%	5.3%	5.3%	5.4%	5.2%
Erin	5.1%	5.1%	5.1%	5.1%	5.0%	5.0%	4.9%	4.9%	4.8%	4.8%	4.8%	5.0%
Mapleton	4.8%	4.7%	4.7%	4.7%	4.6%	4.5%	4.5%	4.5%	4.4%	4.4%	4.3%	4.6%
Minto	3.9%	3.9%	3.9%	3.9%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.7%	3.8%
Puslinch	3.3%	3.3%	3.2%	3.2%	3.3%	3.3%	3.3%	3.3%	3.3%	3.3%	3.2%	3.3%
Total	**225,532**	**229,877**	**234,405**	**239,069**	**243,274**	**247,714**	**251,427**	**256,754**	**261,189**	**265,424**	**267,650**	

SOURCE: Statistics Canada. Table 17-10-0155-01

Method B: Growth Share

Figure 2-4 summarizes the changes in the distribution of population growth across the municipalities comprising the Wellington CD over the preceding 5-year intervals[3]. As shown, since 2020 Centre Wellington has historically accounted for between 13.9% and 14.9% of the Wellington CD's 5-year average growth, the most of any municipality except for the City of Guelph.

Also of significance, this estimated share peaked between the previous two census periods from 2016-2021, with Centre Wellington accounting for 14.9% of total Census Division growth. This trend appears to be on track to recur, demonstrated by the 2025 rate, the year before the next Census, where Centre Wellington has accounted for 15.3% of the Wellington CD's total growth over the period from 2021 to 2025. Across the entire period from 2016 to 2025, Centre Wellington accounted for approximately 14.7% of total CD population growth.

Figure 2-4: 5-Year Share of CD Population Growth by CSD (2020-2025)

Municipality	2016 to 2020	2017 to 2021	2018 to 2022	2019 to 2023	2020 to 2024	2021 to 2025	Total 2016 to 2025
Guelph	65.6%	67.0%	65.1%	64.9%	63.0%	64.6%	64.1%
Centre Wellington	**14.0%**	**14.9%**	**14.0%**	**13.9%**	**14.8%**	**13.8%**	**14.7%**
Guelph/Eramosa	6.2%	3.6%	4.6%	3.7%	4.0%	2.5%	4.8%
Wellington North	2.4%	3.3%	4.5%	6.4%	7.3%	9.2%	5.7%
Erin	3.3%	3.3%	3.3%	2.0%	2.4%	3.0%	3.1%
Mapleton	2.5%	1.8%	2.2%	1.7%	1.7%	1.3%	1.9%
Minto	2.6%	2.0%	2.2%	2.9%	3.5%	3.5%	3.0%
Puslinch	3.4%	4.1%	4.1%	4.5%	3.4%	2.1%	2.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: Statistics Canada. Table 17-10-0155-01

2.4 Allocation to Centre-Wellington

The PPMG directs that growth be allocated among the lower-tier municipalities based on the higher of the historical population share (Method A – 12.8%) and the 5-year growth share (Method B – 14.7%). Applying this approach to distribute the projected approximately 103,600 new residents among the eight CSDs results in a baseline growth allocation of approximately 15,200 new residents to Centre

[3] Represents the rolling average share of growth over the preceding 5 year period, inclusive. I.e. from 2021 through 2025.

Wellington between 2025 and 2051. The growth share-based allocations by municipality forming Wellington County are shown in Figure 2-5 to follow.

Figure 2-5: Baseline Applied Growth Share Approach

Municipality	Growth Share	Growth	2051 Population
Guelph	64.1%	66,500	227,250
Centre Wellington	**14.7%**	**15,200**	**49,750**
Guelph/Eramosa	4.8%	5,000	19,850
Wellington North	5.7%	5,900	20,300
Erin	3.1%	3,200	16,100
Mapleton	1.9%	1,900	13,400
Minto	3.0%	3,100	13,150
Puslinch	2.8%	2,900	11,500
Total Growth		**103,700**	**371,300**

SOURCE: urbanMetrics Inc. Numbers may not add due to rounding.

In addition, the PPMG also directs that adjustments be considered to account for factors such as regional coordination, deviations from market demand, and other extenuating circumstances.

Regarding Wellington CD's growth, potential limits on the City of Guelph's ability to accommodate its population allocation are anticipated to affect the rest of the municipalities within Wellington CD. This scenario justifies consideration of allocations beyond a binary choice between Method A (12.9%) and Method B (14.7%). These capacity limitations and uMi's assumed corresponding adjustments are discussed in greater detail in the next subsection.

Growth Limitations – City of Guelph

The City of Guelph's 2021 Growth Management Strategy ("Guelph GMS") guided the City's Official Plan to implement an approach to accommodate its future growth by prioritizing intensification and higher-density unit-type development patterns. The LNA completed as part of this Guelph GMS identifies sufficient greenfield and intensification opportunities to accommodate a 2051 population of 208,000 residents. This is recognized in Policy 3.2.1 of the City of Guelph Official Plan.

Looking ahead to 2051, a City of Guelph population of 208,000 would equate to approximately 55.9% of the projected 2051 Wellington CD population, significantly less than a 59.9% population share (Method B approach), the latest calculated distribution rate of population growth identified for Guelph in the preceding Figure 2-4. Applying the calculated 2025 growth share (Method B) to Guelph would equate to a population of approximately 227,250, as shown in Figure 2-5.

As such, the gap left between Guelph's 2051 planned population of 208,000 and its allocation of 227,250 in the previous step results in a need to plan for the "spillover" of an additional approximately 19,200 residents to the other municipalities in the Wellington CD in excess of their growth share calculated in Figure 2-5.

These approximately 19,200 residents represent some 18.5% of total projected growth in the Wellington CD and approximately 8% of Guelph's baseline 2051 allocation. Allocating this spillover demand among the municipalities of Wellington County in line with the previously established growth shares, approximately 40.8% of Guelph's "spillover" growth of 19,200 would be allocated to Centre Wellington, and the remainder allocated to the other six local municipalities.

The following Figure 2-6 shows the adjusted 2051 population distribution based on the revised allocations that consider the 208,000 resident capacity limitation in the City of Guelph.

Figure 2-6: Adjusted 2051 Growth Share Allocations

Municipality	Base Growth Allocation	Allocation of Guelph Spillover	Additional Growth	Total Growth	Adjusted 2051 Population
Centre Wellington	**15,200**	**40.8%**	**7,800**	**23,000**	**57,600**
Guelph/Eramosa	5,000	13.4%	2,600	7,600	22,500
Wellington North	5,900	15.8%	3,000	8,900	23,300
Erin	3,200	8.6%	1,600	4,800	17,700
Mapleton	1,900	5.1%	1,000	2,900	14,400
Minto	3,100	8.3%	1,600	4,700	14,700
Puslinch	2,900	7.8%	1,500	4,400	13,000
Wellington CD (excluding Guelph)	**37,200**	**100%**	**19,100**	**56,300**	**163,200**

SOURCE: urbanMetrics from Ontario Ministry of Finance Fall 2025 Population Projections & Statistics Canada

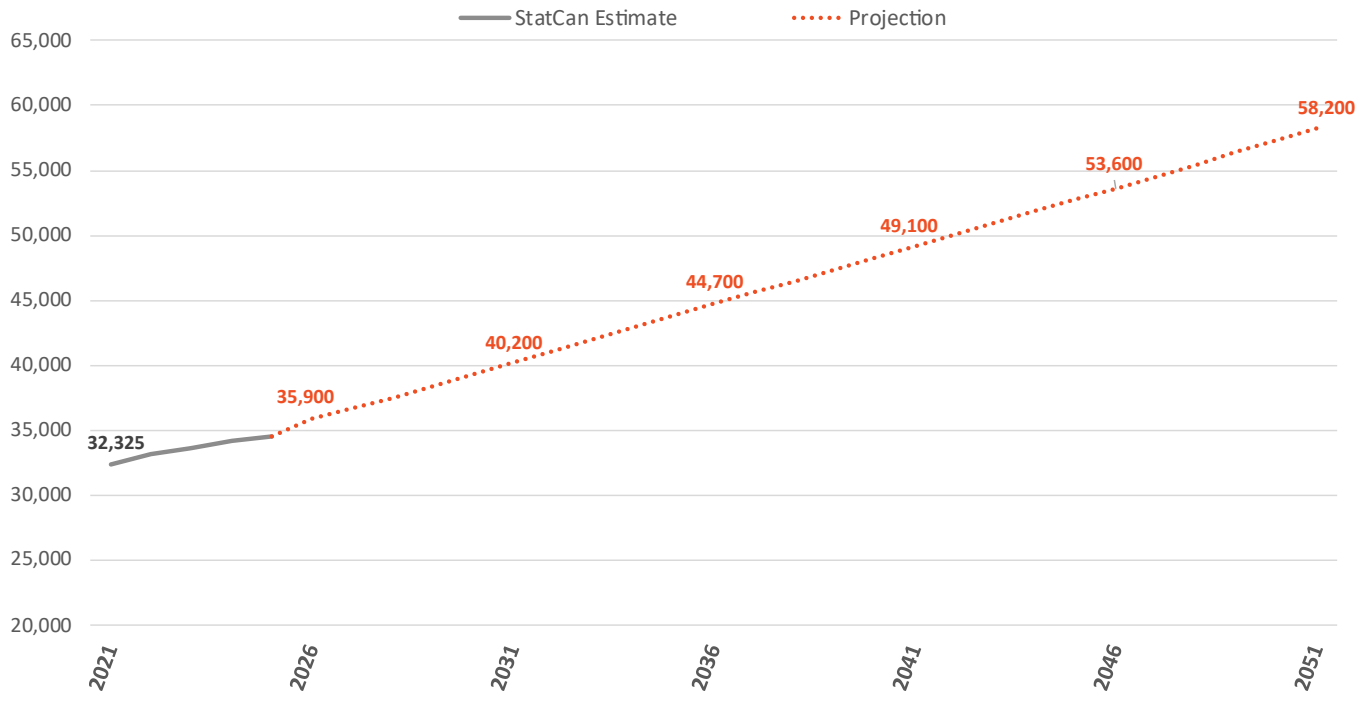
Implications for Centre Wellington

As a result of the estimated spillover of Guelph's population allocation beyond its 2051 planned population, under the revised growth share calculation, Centre

Wellington would be allocated growth of 23,000 residents between 2025 and 2051.

It should be noted that this projection generally aligns with the Township's OPA 120 allocation of a population of 58,200 in 2051. Moving forward, we have maintained this population projection of approximately 58,200 residents, as shown in Figure 2-7.

Figure 2-7: Centre-Wellington Population Allocation

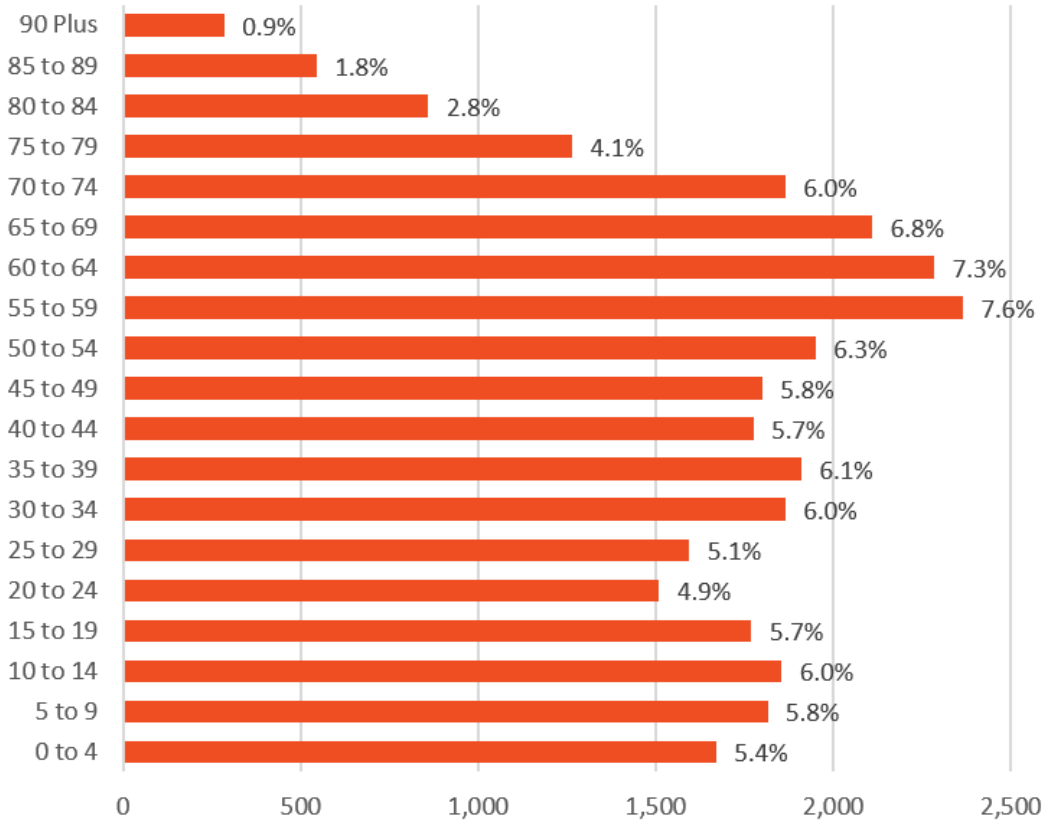


SOURCE: Statistics Canada 17-10-0152-01 (2021-2025), and Fall 2025 Ministry of Finance Population Projections (2026-2051)

Age Cohort Projections

This total population projection is translated into a household projection by 5-year age cohort for Centre Wellington, using the 2021 Census 5-year age cohort breakdown. This breakdown of the population into 5-year age cohorts is shown in Figure 2-9 and represents the 2051 population target shares for each cohort used in this analysis.

Figure 2-8: Share of Baseline Population by 5-Year Age Cohort



SOURCE: Statistics Canada 2021 Census Profile

3 Housing Forecast

3.1 New Households Created

To translate the projected growth scenarios into household growth, a headship or household formation rate is applied. These rates, derived from 2021 census housing data, are presented in 5-year age cohorts to illustrate how likely a given resident is to be the "household maintainer" by age. In 2021, the overall headship rate, the proportion of the total population that serves as a household maintainer, was approximately 39.0%. This is slightly higher than the Wellington CD average of approximately 38.6%, indicating a largely similar likelihood that residents will form households in Centre Wellington as in other Wellington CD municipalities.

Figure 3-1: Headship Rates (2021 Census) - Centre-Wellington

Age Group	Household Maintainers	Total Population	Headship Rate
14 and Under	0	5,335	0.00%
15 to 19	0	1,650	0.00%
20 to 24	135	1,595	8.46%
25 to 29	500	1,615	30.96%
30 to 34	845	1,865	45.31%
35 to 39	1,035	1,935	53.49%
40 to 44	875	1,750	50.00%
45 to 49	970	1,785	54.34%
50 to 54	1,100	1,990	55.28%
55 to 59	1,325	2,325	56.99%
60 to 64	1,200	2,250	53.33%
65 to 69	1,150	1,960	58.67%
70 to 74	1,085	1,885	57.56%
75 to 79	745	1,195	62.34%
80 to 84	485	805	60.25%
85 to 89	325	445	73.03%
90 Plus	165	265	62.26%
Total (All Ages)	11,975	30,645	39.08%
Total (15+)	11,970	25,310	

SOURCE: urbanMetrics Inc., based on Statistics Canada & Ministry of Finance. Population may differ from other Statistics Canada reported populations.

As is typical across Ontario, headship rates in Centre Wellington rise steeply from the 20-24 cohort through the 55 to 59 cohort, reflecting a progression of life-stage

household formation patterns. Younger adults tend to form households, families grow, and seniors are increasingly likely to live independently.

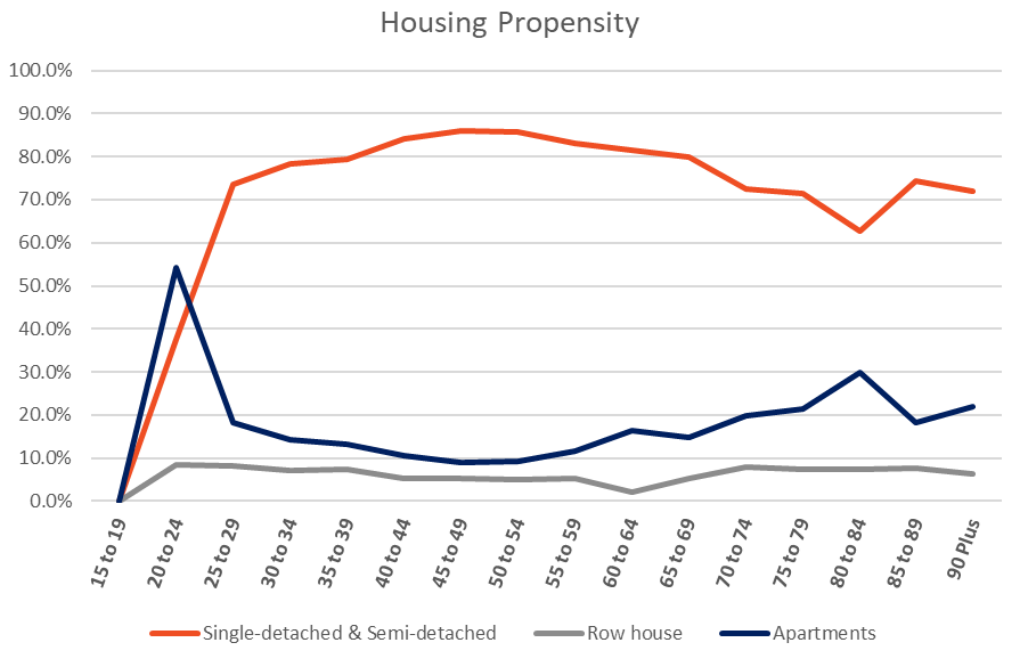
It should also be noted that students living in residences, retirees living in senior living or old-age homes, and other forms of institutional households are not included in these calculations.

3.2 Unit Type Propensities

To provide a more detailed assessment of the land required to support housing and align with residents' household preferences, total household growth is multiplied by a housing-type propensity factor for each five-year age cohort. This factor is calculated using additional Statistics Canada data that identifies how likely a household maintainer is to live in a specific type of house.

In line with typical standards, urbanMetrics has aggregated these unit types into three built form categories: Single & Semi-detached (low density), Row & Townhomes (medium density) and Apartments (high-density), which also includes units identified by Statistics Canada as "other". The present unit type propensities of Centre Wellington residents by 5-year age cohort are illustrated in Figure 3-2 below.

Figure 3-2: Housing Type Propensity - Centre Wellington



SOURCE: Statistics Canada Custom Data Tabulation from 2021 Census

There is very little historical representation of medium-density housing forms, such as row houses and townhomes, consistent with the strong preference for single and semi-detached housing types in municipalities with a significant rural character such as Centre Wellington. As such, these unit types are generally under-represented in the housing forecast. The dataset used to derive the housing need-by-type projection in the next section is available in Appendix A5.

3.3 Unit Demand Forecast

Figure 3-3 illustrates total household demand in Centre Wellington by dwelling type for five-year intervals from 2021 to 2051. Total occupied households are projected to grow from a baseline of approximately 11,830 in 2021 to approximately 22,310 by 2051 — a net increase of approximately 10,480 units over the planning horizon.

Figure 3-3: Household Forecast by Dwelling Type - Centre Wellington to 2051

Year	Single & Semi-detached	Row House	Apartments	Total
2021	9,315	700	1,815	11,830
2026	10,685	791	2,077	13,553
2031	12,007	891	2,337	15,235
2036	13,401	996	2,610	17,008
2041	14,776	1,099	2,881	18,756
2046	16,164	1,204	3,153	20,521
2051	17,570	1,310	3,430	22,310
2021-2051 Growth	**8,255**	**610**	**1,615**	**10,480**

SOURCE: urbanMetrics Inc., based on Statistics Canada & Ministry of Finance

The PPMG directs land needs assessments to base demand projections on market-based housing-type preferences and provides guidance towards applying headship rates calculated using Statistics Canada data to project market demand by unit type.

However, based on the historically low concentration of medium- and high-density housing formats in the municipality, applying row house headship rates will maintain a modest level of projected row house demand. This is further discussed in upcoming sections.

Adjustment for Non-Permanent Residences

Considering that market-based demand for households by unit type will be required to support the degree of population growth identified, this total is adjusted to account for a share of units that will be occupied as non-primary residences.

Statistics Canada identifies these units as "not occupied by usual residents". These include second homes, where people may split their time between two locations but must designate a single permanent residence, and vacation homes, where people may spend significantly less time than at their primary residence.

Historically, Statistics Canada has identified approximately 6.1% of units in Centre Wellington in this category (rounded to 6%). For the purpose of this LNA, we have applied a slightly more conservative 5% adjustment to net new household growth as an unoccupied-unit adjustment to reflect that this historical trend could decline going forward, while maintaining the presence of these units to ensure the future housing supply is sufficient to support both permanent residents and additional units not occupied by usual residents.

This results in an adjustment to the number of households required in 2051 under the High Scenario to 22,861, a difference of approximately 551 additional units (Figure 3-4). As shown, this also expands the volume of household growth derived over the period from 10,480 units (Figure 3-3) to 11,031 units.

Figure 3-4: Non-Permanent Residence Unit Demand Adjustment

	Single & Semi-detached	Row House	Apartments	Total
Household Growth 2021 to 2051	8,255	610	1,615	10,480
5% Unoccupied Unit Factor	434	32	85	551
Gross Household Growth - 2021-2051	8,689	642	1,700	11,031
Adjusted 2051 Household Requirement	18,004	1,342	3,515	22,861

SOURCE: urbanMetrics Inc., based on Statistics Canada

Adjustments to Headship-Based Unit Type Preferences

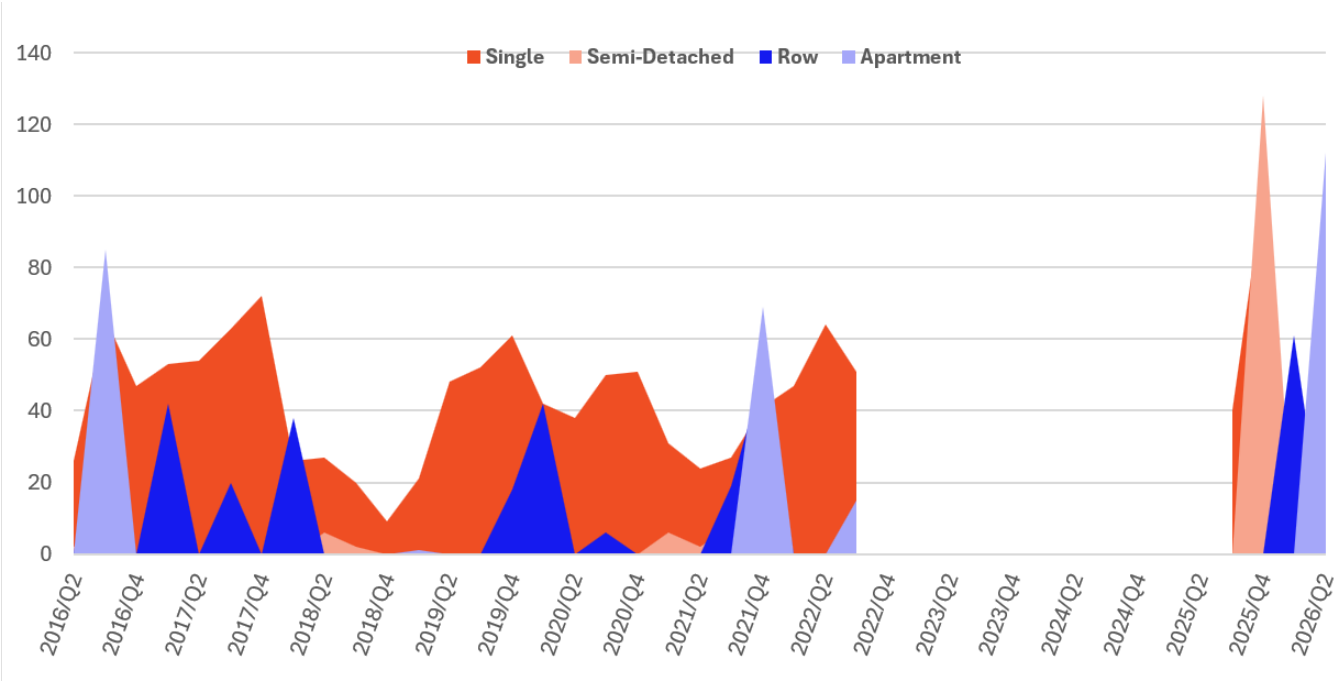
As mentioned previously, the application of headship rates calculated using the 2021 Census to arrive at market demand integrates the underlying assumption that unit-type preferences are aligned to the housing stock at the time of the 2021 Census.

However, this foundational assumption can potentially under-represent the amount of housing stock delivered without adequately considering both trends in the construction industry and how the affordability of different unit types has and is likely to change over time. As a result, it ignores the dynamics of any demand substitution given its reliance on trends from the 2021 Census and any changes moving forward.

In some circumstances, town and row home units can be delivered at more attainable price points than single- and semi-detached homes, allowing a portion of single- and semi-detached demand to be met through row and other medium-density unit types. In this context, it is reasonable to expect that a portion of the identified single- and semi-detached demand will be met through additional row-house construction beyond what is projected by directly applying unit-type propensities based on 2021 Census data.

Figure 3-5 on the subsequent page illustrates how the types of units being delivered in Centre Wellington, as reported by CMHC, have shifted from the second quarter of 2016 through the end of the second quarter of 2026. As shown, while single-family units continue to represent a significant proportion of total completions, development activity in semi-detached, row, and apartment units has increased.

Figure 3-5: CMHC-Tracked Completions by Unit Type in Centre Wellington



SOURCE: CMHC Starts & Completions Survey. No data reported for 2022 Q4 through 2025 Q2.

It should be noted that structures sometimes referred to as stacked townhouses and some other built forms, such as duplexes or triplexes, where one or more units in a single structure are not directly ground-related, are classified as apartments by CMHC. As a result, many of the apartment units identified in Figure 3-5 have taken the form of stacked townhouses and other unit types sometimes identified as "medium density".

The growing prevalence of medium and higher density units is also visible in the current development application pipeline in Centre Wellington. urbanMetrics' review of the approved and under review applications listed on the Township's website at the time of writing identified that approximately 57% of units being proposed were row, townhome, apartment, or other accessory units, as shown in Figure 3-6 below[4].Additional information on these development applications is available in Appendix A6.

The historical unit mix, visualized in Figure 3-5 is also shown, with approximately 69% of CMHC reported completions since the second quarter of 2017 taking the form of Single and Semi-detached units, 17% Row and Town units, and 13% Apartment units.

Figure 3-6: Unit Mix Comparisons

	Single/Semi		Row/Town		Apartment		Total
Current Development Pipeline	601	43%	471	34%	327	23%	1,399
CMHC Completions Since 2017 Q3	1,024	69%	254	17%	197	13%	1,475

SOURCE: Current Development Pipeline from County of Wellington Development Applications accessed 8-12-2026[5], CMHC Completions Since 2017 Q3[6].Numbers may not add due to rounding.

Adjusted Demand by Unit Type

In urbanMetrics' professional opinion, a market-based assessment of housing demand should consider both historical preferences for different unit types and shifting consumer preferences, construction realities, and the relative affordability that can come with more efficient unit types.

On this basis, we have adjusted the gross household demand shown in Figure 3-4 based on the analysis in the previous subsection to reflect the growing prevalence of medium and higher density units and to take a more conservative approach to

4 Not including applications "on hold", proposed boundary expansions or employment land removals.
5 Not including applications "on hold", proposed boundary expansions or employment land removals.
6 Not adjusted for unreported data between 2022 and 2025.

modelling the land required to accommodate a given population These adjustments are shown in Figure 3-7 and are considered to represent a more reasonable mix of housing that is responsive to market demand, considers affordability, and provides a range of housing types.

Figure 3-7: Adjustments to Demand by Unit Type

	Single & Semi-detached	Row House	Apartments	Total
Gross Household Demand	8,689	642	1,700	11,031
Unit Share	78.8%	5.8%	15.4%	100%
Market Trend Adjusted Share	60.0%	25.0%	15.0%	100%
Unit Shift	-2,071	2,116	-45	0
Adjusted Household Demand	**6,619**	**2,758**	**1,655**	**11,031**

SOURCE: urbanMetrics Inc., considering CMHC completions survey.

As shown above, expanding the consideration of market demand to better reflect changing trends and preferences results in a 2,071-unit reduction of single and semi-detached units, and a corresponding increase of 2,116 row units and a modest reduction of 45 apartment units, largely due to rounding the percentages in the unit mix for simplicity. The resulting adjusted household demand projections are 6,619 single and semi-detached units, 2,758 row units, and 1,655 apartment units.

4 Land Needs Assessment

To calculate the amount of housing supply required to be planned for over the period up to 2051, several adjustments must be made to the market-based calculation of gross household demand of 11,031 units (shown in Figure 3-7) calculated in the previous section. These adjustments include:

- Adjustments for units already completed between the baseline year of 2021 and current 2026 estimates.
- Adjustments for policy-based intensification targets.

4.1 Adjustments for Unit Completions & Active Developments

The gross unit demand figure is first reduced by the number of housing completions recorded from 2021 to the present day, as these units have already contributed to meeting demand for the 2021 to 2051 period.

The Canada Mortgage and Housing Corporation ("CMHC") tracked 1,097 completions in Centre-Wellington from the third quarter of 2021, the time of the 2021 Census, to the second quarter of 2026.[7] This data has gaps for a significant portion of this period. To ensure that contributions to the housing supply in Centre Wellington are not under-represented in this analysis, we have estimated the number of completions during periods with no reported data, assuming that average quarterly completions by unit type from 2017 to 2022 continued during those periods. Incorporating these assumptions, the revised estimate of 1,422 completions comprised 904 single- and semi-detached units, 223 row units, and 296 apartment units.[8]

In addition to these completed units, a review of recently approved and currently active development applications in Centre Wellington that are not subject to an appeal or other known caveat identified a further 601 single and semi-detached units, 471 row home units, and 327 apartment units.

[7] The baseline year in this analysis and the Township LNA.
[8] 2021 to present housing completions based on CMHC Housing Completion Data, adjusted for data omissions.

Subtracting these units from the gross demand estimate of 11,031 results in an adjusted estimate of 8,210 units now needed to support remaining population growth to 2051, as shown in Figure 4-1 on the following page.

Figure 4-1: Adjustment for Unit Completions

	Single & Semi-detached	Row House	Apartments	Total
Gross Household Demand	6,619	2,758	1,655	11,031
(-) Unit Completions 2021-2026	904	223	296	1,422
(-) Under Review & Approved Applications	601	471	327	1,399
Residual Demand	**5,113**	**2,064**	**1,032**	**8,210**

SOURCE: urbanMetrics Inc. from CMHC Starts & Completions Survey Q3 2021 – Q2 2026

4.2 Intensification

With the demand for housing to 2051 reduced by already completed units, units expected to be accommodated within the Built-Up Area (BUA), referred to as intensification units, are also removed. These units are subtracted from the land needs calculation to reflect that they will be located within the existing Built-Up Area (BUA) and will not contribute to any future demand for greenfield land.

Section 3.3.1 of the Wellington County OP sets a County-wide minimum intensification target of 15% and a 20% target for Centre Wellington.

During the background studies completed in the development of OPA 126, the Township of Centre Wellington retained Watson & Associates Economists Ltd. to complete an LNA prepared at the Township level. This LNA, and subsequent revisions to the draft documents, evaluated intensification rates as high as 30%.

Ultimately, the County and Township processes concluded with OPA 126 and its associated boundary expansions, which included reducing the County-wide intensification target to 15%.

Contrasting this intensification target with the identified availability of land to accommodate lower-density unit types highlights a conflict between achieving the intensification target and providing a market-based housing mix, as pursuing this target will restrict Centre Wellington's potential to accommodate lower-density ground-related unit types.

This is especially noteworthy in the current market context, where delivering higher-density projects at prices that are attainable for most Ontario homebuyers

is extremely challenging. In our opinion, pursuing a 20% or higher intensification target in Centre Wellington will result in a significant undersupply of ground-related units that align with market demand and, potentially, an undersupply of housing in general.

As a result, for the purpose of this LNA, we have assumed a more moderate intensification target of 15% that remains relatively high to reflect the Township's desire to promote intensification and compact built forms while allowing for a more reasonable mix of future housing supply that is more aligned with market demand. It should be noted that this intensification rate would still require approximately 56 units to be completed annually within the BUA between 2026 and 2051.

Further, in our opinion, it should not be assumed that all unit types are equally likely to be delivered within the BUA, and the evaluation of potential intensification should account for how much land each unit type occupies and how well it aligns with the potential intensification opportunities in the BUA.

As a result, we have assumed that, to work towards this intensification target, less land-intensive unit types are more likely to develop and will be more feasible to develop in the BUA, while also acknowledging that units of all types will be accommodated in greenfield developments, to some extent.

Assigning units to the BUA as outlined in Figure 4-2 results in an approximately 15% intensification rate, and approximately 1,238 units expected to be delivered in the BUA, consisting of approximately 51 singles/semis, 258 row homes, and 929 apartments of all types.

The remainder of the units represent greenfield unit demand and consist of 5,062 singles/semis, 1,806 row homes, and 103 apartments, totalling some 6,972 units to be developed within the Designated Greenfield Areas ("DGA") of the Township (Figure 4-2).

Figure 4-2: Intensification in the BUA

	Single & Semi-detached	Row House	Apartments	Total
Residual Demand	5,113	2,064	1,032	8,210
(-) Units Provided Through Intensification	51	258	929	1,238
Percent of Units in BUA	*1.0%*	*12.5%*	*90.0%*	*15%*
Greenfield Unit Demand	**5,062**	**1,806**	**103**	**6,972**

SOURCE: urbanMetrics Inc.

4.3 Greenfield Unit Demand

Greenfield Units in the Pipeline

The previous section establishes demand for units in the greenfield area that contribute to land need. Units already built in the DGA since the beginning of the projection period in 2021, and greenfield units currently proposed or approved as active developments within the DGA or OPA 126 added lands have also been accounted for in Figure 4-1.

The corresponding land supply associated with these developments is subtracted from the available supply in the upcoming supply section, ensuring that both the demand for and supply of greenfield units and land are reflected.

4.4 Greenfield Land Need

The DGA residual unit demand from Figure 4-2 is then translated into its land equivalent. To determine the amount of land required to accommodate these units, unit densities are applied to each unit type. The County and Township policy framework presents a range of densities by unit type potentially relevant to long-term planning.

The County Official Plan Section 4.4.4 identifies a target of 16 units per gross hectare in newly developing subdivisions, while defining gross hectares as including roads, parks, and stormwater management blocks, but excluding natural heritage features, floodplains, other defined land use designations, cemeteries, and lands used for utility and transportation rights of way.

The Township's Official Plan identifies a variety of density factors in different areas of the community, including:

- minimum factor of 22 units per net hectare in some Neighbourhood Residential Areas (PA1-15 Neighbourhood Residential c) on page 58).
- minimum density of 30 units per gross residential hectare for multiple residential (PA1-15 Multiple Residential b) on page 59).
- 16 units per gross hectare in newly developing subdivisions (C.5.6.2.9 (i). on page 18).
- Maximum densities of 35 units per hectare for rows and townhouses and 75 units per hectare for apartments on areas designated Residential (D.2.5 1) on page 39).

The Township OP does not clearly state whether some of these figures are net developable or gross; in addition, it also does not explicitly identify what is included or excluded from this estimate. However, references that do not state whether the factor is net or gross refer directly to lands with a specific residential designation and, as such, would be reasonable to assume they exclude infrastructure and other land use designations, effectively representing a net density.

As a result, we have applied these densities to align with the County OP definition and to include roads, parks, and stormwater blocks in the context of a plan of subdivision, but do not include undevelopable areas, infrastructure, or other land uses.

Applying these benchmarks results in a net residential land need totalling 276.7 hectares. To determine the gross land need, including all the other land-absorbing factors identified above, a net-to-gross ratio of 50% is applied. The resulting 553.5 hectares is further adjusted by a 5% long-term market vacancy factor. This adjustment builds in the development reality that not all designated land, or even approved plans, automatically proceed as expected over a given time horizon.

After this adjustment, a total of 581.1 gross hectares of land are identified as needed to accommodate projected housing demand to 2051 (Figure 4-3) in Centre Wellington.

Figure 4-3: Estimated Greenfield Land Need

	Single & Semi-detached	Row House	Apartments	Total
Residual Greenfield Unit Demand	5,062	1,806	103	6,972
(/) units per net developable hectare	22	40	70	25.2
Developable Land Need	**230.1 ha**	**45.2 ha**	**1.5 ha**	**276.7 ha**
(+) Net to Gross Developable Ratio				50%
				553.5 ha
(+) 5% Market Vacancy Factor				**27.7 ha**
Gross Land Need				**581.1 ha**

SOURCE: urbanMetrics Inc., rounded to the nearest hectare (ha). Total net density of 24.9 is a derived calculation.

5 Land Supply Assessment

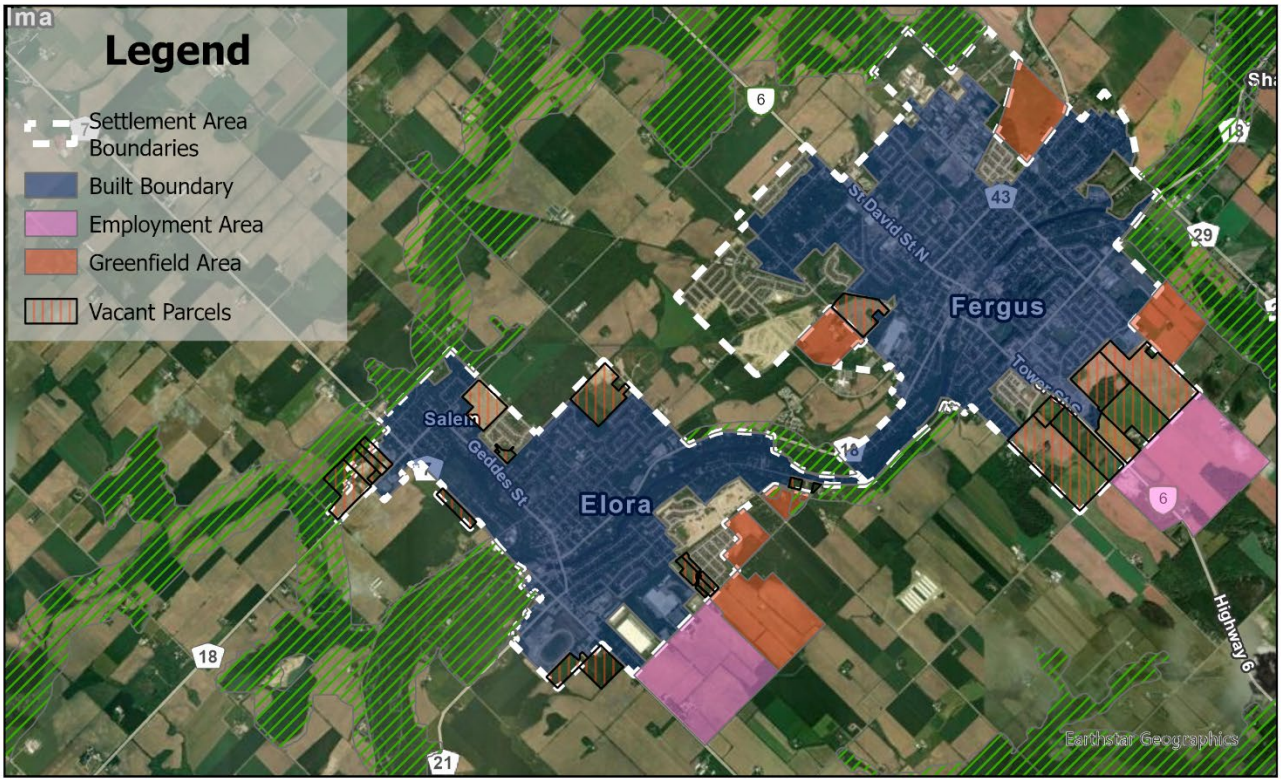
5.1 Land Supply Baseline

The Township of Centre Wellington and County of Wellington both provide land supply maps or inventories. However, the last comprehensive update for the Township was completed in July 2019, and subsequent land development reports issued by the County do not provide sufficient detail to bring the Township's 2019 Supply Estimate up to July 2026. If an update to the Township's July 2019 Residential Land Supply is issued, it is reasonable to review the land supply information herein in the context of new data from the Township or County.

In the absence of this information, we have conducted a spatial analysis using GIS data from the Township and the County of Wellington to estimate the supply of land available to meet projected unit demand and the associated land need.

Using this data, the Fergus and Elora/Salem Settlement Areas were calculated to have a total of 443.5 hectares of vacant land supply to accommodate greenfield growth. These identified parcels are shown in orange in Figure 5-1 on the next page.

Figure 5-1: Land Supply Baseline Estimate



SOURCE: urbanMetrics Inc. from County of Wellington Open Data, Township of Centre Wellington GIS Services, Ontario GeoHub, ESRI Canada & TomTom

5.2 Land Supply Adjustments

Using GIS analysis and supplementary desktop research, we have estimated the current land supply that remains available for greenfield residential development in the Fergus and Elora/Salem Settlement Areas. This estimate has been made by removing lands that were visually identified as having been built on in the period between 2021 and 2026 to date, and applications currently subject to a development approval or active application within a current designated greenfield area as identified by the Township's active development applications portal.

As shown in Figure 5-2, several of the previously identified orange parcels subject to development applications (denoted by the coloured circles) are removed from the supply shown in Figure 5-1.[9] A full list of development applications is included in Appendix A6.

[9] 75 Woolwich Street East, 6490 First Line, 8076 Wellington Road 19

Figure 5-2: Land Supply Adjusted for Completions & Active Applications

SOURCE: urbanMetrics Inc. from County of Wellington Open Data, Township of Centre Wellington GIS Services, Ontario GeoHub, ESRI Canada & TomTom

After accounting for land absorbed by completed or ongoing development and allowing for a 5% margin of error when applying desktop-based spatial analysis to land supply estimates, between 390.6 and 410.1 hectares of developable land are available to support greenfield development. These calculations are summarized in Figure 5-3 below.

Figure 5-3: Land Supply Calculations Summary Table

	Land Area
Estimated Remaining Pre OPA 126 Lands	241.9 ha
Estimated Remaining OPA 126 Expansion Lands	148.7 ha
Total Estimated Available Lands	390.6 ha
5% Variance for Measurement Accuracy	19.5 ha
Estimated Land Supply	**410.1 ha**

SOURCE: urbanMetrics Inc.

6 Conclusion

The following key conclusions summarize the calculations driving the need for additional land in Centre Wellington.

- Projected population growth in Centre Wellington between 2021 and 2051 is estimated to require approximately 10,480 new units overall. This total supply is increased to 11,031 to account for the estimated portion of supply comprising units occupied by non-permanent residents.
- This amended supply estimate is then further distributed between unit types after accounting for recent development trends and projected market demand moving forward, resulting in a projected unit mix of 6,619 single and semi-detached units, 2,758 row units, and 1,655 apartment units.
- After subtracting unit completions between 2021 and mid-2026 and the approved or under-review development pipeline on designated residential lands within the Township, the 11,031 total unit supply estimate is reduced to a requirement for 8,210 additional units.
- This 8,210-unit total is further adjusted by 15% to account for a policy-based intensification target, assuming that higher-density unit types are more likely to be developed within the BUA. As a result, the remaining greenfield unit demand is estimated to be 6,972 units requiring approximately 581.1 gross hectares of land.
- A GIS-based calculation identified a supply of 443.5 gross hectares of available land. Of this identified land, approximately 52.9 hectares are identified as having already been developed or subject to an active development application or approval. The remaining supply is estimated at 390.6 gross hectares.
- Applying a 5% adjustment to allow for any potential variance in desktop-based spatial analysis results in a current estimated supply of between 390.6 and 410.1 hectares of remaining available greenfield land for future community area development.

Therefore, based on the methodology outlined in this Land Needs Analysis, a shortfall of between 171.0 and 190.5 gross hectares of community area land exists in Centre Wellington required to support the municipality's own projection of growth to 2051, and the requirement would increase under higher population forecasts.

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A2 Policy Tests

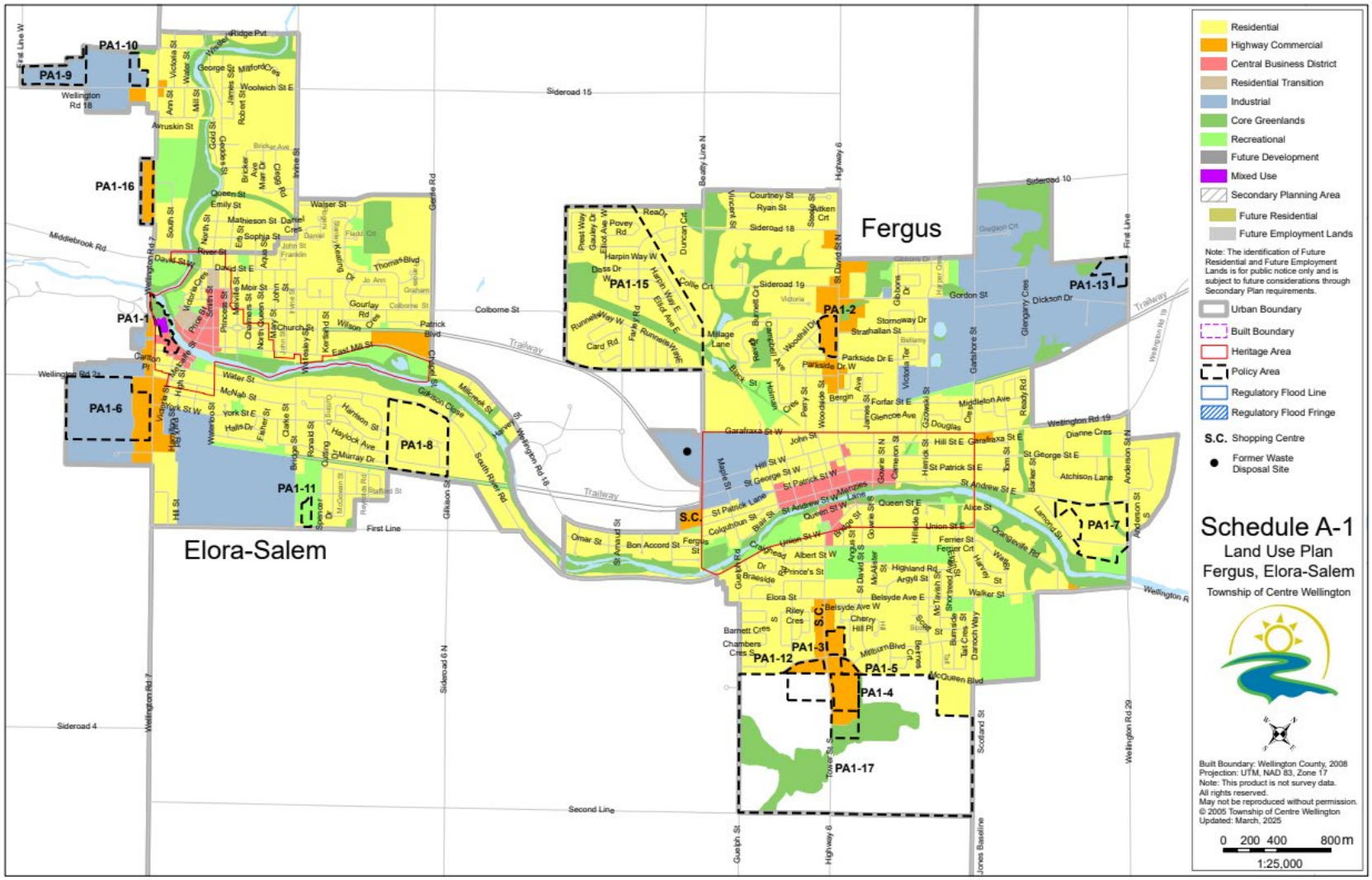
Provincial Planning Statement 2024, 2.3.2

1. New Settlement Areas and Settlement Area Boundary Expansions 1. In identifying a new settlement area or allowing a settlement area boundary expansion, planning authorities shall consider the following:

> *a) the need to designate and plan for additional land to accommodate an appropriate range and mix of land uses;*
>
> *b) if there is sufficient capacity in existing or planned infrastructure and public service facilities;*
>
> *c) whether the applicable lands comprise specialty crop areas;*
>
> *d) the evaluation of alternative locations which avoid prime agricultural areas and, where avoidance is not possible, consider reasonable alternatives on lower priority agricultural lands in prime agricultural areas;*
>
> *e) whether the new or expanded settlement area complies with the minimum distance separation formulae;*
>
> *f) whether impacts on the agricultural system are avoided, or where avoidance is not possible, minimized and mitigated to the extent feasible as determined through an agricultural impact assessment or equivalent analysis, based on provincial guidance; and*
>
> *g) the new or expanded settlement area provides for the phased progression of urban development.*

2. Notwithstanding policy 2.3.2.1.b), planning authorities may identify a new settlement area only where it has been demonstrated that the infrastructure and public service facilities to support development are planned or available

A3 Appendix 3: Land Use Plan 2025



Source: Centre Wellington Official Plan Schedule 'A-1' – Land Use Plan, March, 2025

urban Metrics

A4 Land Supply Adjustments

Vacant Parcels

fid*	geom*	ParcelID	RollNUm15	Address	StreetName	Municipality	OBJECTID	Shape_Area	Shape_Length	Shape_Area_Ha	Status
77	Polygon	1E+08	232600002008950	<Null>	<Null>	Centre Wellington	35949	157.474854	54.504066	0.015747485	
3976	Polygon	11120910	232600002008990	19	Stafford ST	Centre Wellington	32807	472.47168	86.282143	0.047247168	
15932	Polygon	8.13E+09	232600002214100	10	Salem ST	Centre Wellington	26020	1102.643555	135.265506	0.110264356	
27187	Polygon	1.2E+08	232600002010792	441	South River RD	Centre Wellington	40606	4816.773682	315.608332	0.481677368	
28578	Polygon	1112098	232600002008910	11	Stafford ST	Centre Wellington	32805	5822.950684	368.328532	0.582295068	
29216	Polygon	805084	232600001600116	7446	Wellington RD 18	Centre Wellington	31960	9048.986816	398.006479	0.904898682	
29940	Polygon	8.13E+09	232600002010700	411	South River RD	Centre Wellington	24489	12252.72827	444.31809	1.225272827	
31203	Polygon	1112092	232600002008522	18	Stafford ST	Centre Wellington	32799	10943.74341	577.789348	1.094374341	
31327	Polygon	11120911	232600002008992	23	Stafford ST	Centre Wellington	32808	14304.68433	595.284484	1.430468433	
31384	Polygon	1112099	232600002008940	15	Stafford ST	Centre Wellington	32806	13727.48535	605.023923	1.372748535	
32078	Polygon	11909150	232600002212665	51	Stumpf ST	Centre Wellington	32923	17370.68189	731.737405	1.737068189	
32507	Polygon	1112091	232600002008672	14	Stafford ST	Centre Wellington	32798	30349.14258	827.233008	3.034914258	
32996	Polygon	311103	232600002003600	901	Highway 6	Centre Wellington	33033	51020.40918	924.75681	5.102040918	
33072	Polygon	805083	232600001600115	7448	Wellington RD 18	Centre Wellington	31959	30486.75098	945.192913	3.048675098	
33105	Polygon	805082	232600001600100	7450	Wellington RD 18	Centre Wellington	31958	32893.71484	955.185003	3.289371484	
33564	Polygon	805085	232600001600117	7444	Wellington RD 18	Centre Wellington	31961	52311.4541	1089.416365	5.23114541	
33730	Polygon	8.13E+09	232600001714750	350	Wellington RD 7	Centre Wellington	27041	44592.6167	1158.240013	4.45926167	
33899	Polygon	8.13E+09	232600001701410	<Null>	<Null>	Centre Wellington	27086	62359.99072	1242.042267	6.235999072	
33996	Polygon	8.13E+09	232600001701300	6448	Wellington RD 7	Centre Wellington	26911	101176.6414	1274.885187	10.11766414	
34322	Polygon	8.13E+09	232600000114800	1100	Tower ST S	Centre Wellington	27572	94984.36719	1430.248045	9.498436719	
34525	Polygon	8.13E+09	232600002204075	75	Woolwich ST E	Centre Wellington	26164	124142.8777	1494.806025	12.41428777	Application
35020	Polygon	8.13E+09	232600000601700	605	Garafraxa ST W	Centre Wellington	31534	138135.9089	1704.143109	13.81359089	
35085	Polygon	8.13E+09	232600001600125	7438	Wellington RD 18	Centre Wellington	26545	139619.0186	1740.330659	13.96190186	
35115	Polygon	8.13E+09	232600002003550	200	McQueen BV	Centre Wellington	29084	185325.9158	1754.376603	18.53259158	
35860	Polygon	8.13E+09	232600002003500	7872	Second LI	Centre Wellington	27464	211272.8865	1979.097492	21.12728865	
35985	Polygon	8.13E+09	232600002100400	6560	Gerrie RD	Centre Wellington	25472	191156.5925	2032.513347	19.11565925	
36148	Polygon	8.13E+09	232600002003610	963	Tower ST S	Centre Wellington	33018	193256.4587	2144.001409	19.32564587	
38388	Polygon	8.13E+09	232600002003700	936	Guelph ST	Centre Wellington	31491	428823.7256	2922.444927	42.88237256	
38582	Polygon	8.13E+09	232600002003450	925	Scotland ST	Centre Wellington	28771	341219.8169	3009.662899	34.12198169	

OPA 126 Additions

FID	Shape*	UrbanID	Name	Type	MuniID	Shape_Leng	Area	Gross Area_ha	Status
1	Polygon	2326002	Elora/Salem	Greenfield Area	2326	1817.055508	155714.1	15.57140879	
2	Polygon	2326002	Elora/Salem	Greenfield Area	2326	1318.983417	96605.72	9.660572478	
3	Polygon	2326002	Elora/Salem	Greenfield Area	2326	5547.31612	641955.7	64.19557109	
5	Polygon	2326001	Fergus	Greenfield Area	2326	13438.1141	228911.7	22.89116786	
6	Polygon	2326001	Fergus	Greenfield Area	2326	13438.1141	361519.2	36.15192085	
7	Polygon	2326001	Fergus	Greenfield Area	2326	13438.1141	407672	40.7672015	Development Application
0	Polygon	2326002	Elora/Salem	Employment Area	2326	5547.31612	1094005	109.4004565	Employment Area
4	Polygon	2326001	Fergus	Employment Area	2326	0	1260846	126.0846035	Employment Area

A5 Headship Rate Calculations

Centre Wellington		Total - Age of	15 to 19 years	20 to 24 years	25 to 29 years	30 to 34 years	35 to 39 years	40 to 44 years	45 to 49 years	50 to 54 years	55 to 59 years	60 to 64 years	65 to 69 years	70 to 74 years	75 to 79 years	80 to 84 years	85 to 89 years	90 to 94 years	95 to 99 years	100 years
Total - Tenure	Total - Structural type of dwelling	11975	0	135	500	845	1035	875	970	1100	1325	1200	1150	1085	745	485	325	165	30	0
	Single-detached house	8685	0	40	305	610	765	675	775	870	1035	900	860	730	500	260	235	105	20	0
	Apartment in a building that has five or more storeys	105	0	0	0	10	10	0	0	0	0	0	10	15	35	0	10	0	0	0
	Other attached dwelling	3090	0	95	195	220	250	195	185	220	290	290	270	330	200	205	80	55	10	0
	Apartment or flat in a duplex	175	0	0	20	10	15	10	10	20	10	15	15	25	0	25	0	0	0	0
	Apartment in a building that has fewer than five storeys	1575	0	75	75	100	110	85	75	80	140	185	145	175	125	120	40	35	0	0
	Other single-attached house	20	0	0	0	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0
	Row house	710	0	10	40	60	75	45	55	50	70	25	60	85	50	45	25	10	0	0
	Semi-detached house	605	0	0	60	50	50	45	40	70	60	60	55	45	20	20	15	10	0	0
	Movable dwelling	90	0	0	0	0	10	0	10	10	0	0	0	15	15	15	0	0	0	0
Owner	Total - Structural type of dwelling	9645	0	25	300	665	835	730	790	900	1170	990	965	880	585	365	280	135	30	0
	Single-detached house	8085	0	15	230	525	695	645	720	795	1005	860	815	710	470	255	225	95	20	0
	Apartment in a building that has five or more storeys	45	0	0	0	15	10	0	0	0	0	0	0	0	10	0	0	0	0	0
	Other attached dwelling	1435	0	10	70	130	120	80	60	100	165	120	135	155	95	95	60	35	10	0
	Apartment or flat in a duplex	50	0	0	0	0	0	10	0	0	0	0	10	10	0	0	0	0	0	0
	Apartment in a building that has fewer than five storeys	420	0	0	10	30	30	0	10	15	50	50	40	70	40	40	20	20	0	0
	Other single-attached house	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Row house	575	0	0	30	50	60	35	40	40	60	25	50	70	40	35	25	0	0	0
	Semi-detached house	385	0	0	30	40	30	30	10	40	50	45	35	10	15	15	10	0	0	0
	Movable dwelling	80	0	0	0	0	0	0	10	0	0	10	10	10	15	15	0	0	0	0
Renter	Total - Structural type of dwelling	2325	0	105	200	185	200	145	180	200	155	210	185	205	160	120	40	30	0	0
	Single-detached house	605	0	20	75	90	65	25	55	70	35	40	35	20	35	0	10	0	0	0
	Apartment in a building that has five or more storeys	60	0	0	0	0	0	0	0	0	0	0	15	10	20	0	15	0	0	0
	Other attached dwelling	1650	0	85	120	95	125	115	125	120	120	165	135	170	105	110	25	25	0	0
	Apartment or flat in a duplex	130	0	0	10	0	10	0	10	15	10	10	0	15	0	25	0	0	0	0
	Apartment in a building that has fewer than five storeys	1160	0	65	70	75	85	80	65	70	95	135	105	110	90	75	25	15	0	0
	Other single-attached house	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Row house	140	0	10	10	10	15	10	10	15	10	0	10	15	15	0	0	10	0	0
	Semi-detached house	220	0	10	25	0	20	20	30	25	10	20	20	40	0	10	0	0	0	0
	Movable dwelling	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Dwelling provided by the loc	Total - Structural type of dwelling	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Single-detached house	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Apartment in a building that has five or more storeys	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Other attached dwelling	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Apartment or flat in a duplex	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Apartment in a building that has fewer than five storeys	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Other single-attached house	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Row house	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Semi-detached house	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Movable dwelling	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Categories	Total (All Ages)	Total (15+)	14 and Under	15 to 19	20 to 24	25 to 29	30 to 34	35 to 39	40 to 44	45 to 49	50 to 54	55 to 59	60 to 64	65 to 69	70 to 74	75 to 79	80 to 84	85 to 89	90 Plus
Household Maintainers	11,975	11,970	5	0	135	500	845	1,035	875	970	1,100	1,325	1,200	1,150	1,085	745	485	325	165
Total Population	30,645	25,310	5,335	1,650	1,595	1,615	1,865	1,935	1,750	1,785	1,990	2,325	2,250	1,960	1,885	1,195	805	445	265
Headship Rate	39.1%	47.3%	0.1%	0.0%	8.5%	31.0%	45.3%	53.5%	50.0%	54.3%	55.3%	57.0%	53.3%	58.7%	57.6%	62.3%	60.2%	73.0%	62.3%

urban Metrics

A6 Development Applications

File Number(s)	Street Address / Location	Municipality	Application Status	Type of Application	Single/Semi-Detached Units	Row/Townhome Units	Apartment/Accessory Uni	Notes
OP-2025-06	7581 Nichol Road 15 (Lot 16, Con. 12) & 6574 Gerrie Road (Part Lot 17, Con. 12)	Centre Wellington	Appealed (OLT-25-000679)	Official Plan Amendment (urban boundary expansion, ~79.04 ha)	583	663	118	Total concept-plan units approx. 1,364; concept-level figures only, not yet a subdivision application. Applicant: Elora Sands Development Inc. / 1389461 Ontario Ltd.
OP-2025-05	6586 Beatty Line N; Lot 17, Concession 14, Nichol	Centre Wellington	Appealed (OLT-25-000900)	Official Plan Amendment (urban boundary expansion, ~43.2 ha)	Not specified	Not specified	Not specified	Concept-plan stage only; Conceptual Block Plan allocates 13.5 ha to single-detached and 4.3 ha to townhouse blocks but gives no unit counts. Detailed counts expected in a future Zoning By-law Amendment / Draft Plan of Subdivision. Applicant: Sorbara/Tribute Brubacher Holdings.
OP-2025-07, 23T-25004	6581 Highway 6; Lot 17, Concession 16, Nichol, Fergus	Centre Wellington	Appealed (OLT-25-000949 and OLT-25-000952)	Official Plan Amendment (urban boundary expansion, ~20.03 ha) + Draft Plan of Subdivision	130	266	139	Total approx. 535 units. Applicant: Polocorp Inc. Originally omitted from this table in error; added on follow-up.
OP-2025-08	6704 Beatty Line N; 6684-6688 Beatty Line N; 7692 Sideroad 15; 7715 Sideroad 15	Centre Wellington	Appealed (OLT-25-000958)	Official Plan Amendment (urban boundary expansion, ~226.03 ha)	Not specified	Not specified	Not specified	No unit-type breakdown available; report estimates approx. 6,856 residential population at 36 persons/ha and approx. 16 units/gross ha, but does not break out unit types. Applicant: Tribute (Fergus Oaks) Ltd.
23T-25003	968 St. David Street North; Part Lot 18, Concession 16, Nichol Township (Fergus South)	Centre Wellington	Appealed to OLT	Draft Plan of Subdivision	88	118	116	Total approx. 323 units including existing house. Applicant: Fergus South Inc.
23T-25006	Part Lot 16, Concession 11 (Elora Sands)	Centre Wellington	Appealed to OLT	Draft Plan of Subdivision	388	203	100	Adjacent to/near the same concession lot as 23T-22005 (Cachet/Clayton). Applicant: Elora Sands Development Inc.
23T-18002	Part of Lots 17 & 18, Concession 12 (Elora)	Centre Wellington	Draft Approved (April 9, 2024)	Draft Plan of Subdivision	102	83	59	Total 244 units confirmed via decision PDF (Blocks 102-106). Applicant: Ainley Subdivision.
23CD-21003	Elora/Salem	Centre Wellington	Draft Approved (February 16, 2024)	Draft Plan of Condominium (Common Element -> Standard, Phased)	20	0	0	20 total units confirmed by PDF; unit-type mix not specified. Applicant: Haylock Farm Ltd.
23CD-24003	36 Rea Drive, Fergus (Part of Block 19, Reg. Plan 61M-227)	Centre Wellington	Draft Approved (February 27, 2025)	Draft Plan of Condominium (Common Elements)	0	14	0	4 visitor parking spaces. Applicant: James Keating Construction Ltd.
23CD-22003	961 St. David Street N	Centre Wellington	Draft Approved (June 18, 2024)	Draft Plan of Condominium (Vacant Land)	13	37	0	Total 50 units; 1.402 ha site.
23CD-23004	465 Garafraxa Street W	Centre Wellington	Draft Approved (October 21, 2025)	Draft Plan of Condominium (Standard)	0	32	0	32 units across 3 stacked townhouse buildings. Applicant: Habitat for Humanity Guelph-Wellington.
23T-22001	Part Lots 9, 10 & 11, Concession 3 (Fergus Golf Club lands)	Centre Wellington	Draft Approved (October 5, 2023)	Draft Plan of Subdivision + Draft Plan of Condominium	118	0	0	PDF confirms 118 single-detached dwellings exclusively, in two blocks north/south of Wellington Rd 19. Applicant: Fergus Developments Inc.
23T-22005	Part Lot 16, Concession 11 (Clayton)	Centre Wellington	Draft Approved (OLT decision, May 22, 2025)	Draft Plan of Subdivision	155	131	0	Applicant: Cachet Developments (Elora) Inc.
23CD-26001	Block 40, Reg. Plan 61M-252, Elora	Centre Wellington	On Hold	Draft Plan of Condominium (Vacant Land, 4-building)	0	0	181	Four 4-storey apartment buildings; 256 exclusive parking spaces. Applicant: Granite Homes South River Inc.
23CD-21002	Elora/Salem area (Hedley Lane)	Centre Wellington	Phase Registered (Phase 1, Plan 286, November 1, 2023)	Draft Plan of Condominium (Standard, Phased)	0	31	0	7 visitor parking spaces; common element amenity area. Applicant: Granite Homes (Haylock Farm Ltd).
23CD-23001	111 Gregson Court, West Garafraxa	Centre Wellington	Phase Registered (Plan 290)	Draft Plan of Condominium (Standard, Phased)	0	0	0	NON-RESIDENTIAL: 10 industrial/commercial condominium units (Timberworx). Excluded from residential unit totals.
23CD-21001	99 Farley Drive, Fergus	Centre Wellington	Registered (Plan 287, May 23, 2024)	Draft Plan of Condominium (Standard)	0	0	86	
23CD-20203	112 Sideroad 19, Fergus	Centre Wellington	Registered (Plan 295, September 12, 2024)	Draft Plan of Condominium (Vacant Land)	16	0	0	Includes common elements road and open space block.
23CD-22002	6523 Wellington Road 7, Elora	Centre Wellington	Registered (Plan 297, November 6, 2024)	Draft Plan of Condominium (Standard)	0	0	137	176 parking stalls, 153 lockers.
23CD-23005	Block 39, Reg. Plan 61M-252, Centre Wellington	Centre Wellington	Registered (Plan 298; initial Nov 15, 2024; Phase 1 Sep 24, 2025)	Draft Plan of Condominium (Standard, Phased)	0	31	0	11 initial + 20 phase-1 townhouse units. Applicant: Granite Homes South River Inc.
23T-18005	Inverhaugh	Centre Wellington	Registered (Plan 61M-264, January 16, 2025)	Draft Plan of Subdivision	40	0	0	No planning justification/staff report linked on page. Applicant: Elora Ridge Developments.
23CD-24004	940 St. David Street N, Fergus	Centre Wellington	Registered (WCP 304, September 16, 2025)	Draft Plan of Condominium (Standard)	0	112	0	2-bedroom stacked townhouse units. Applicant: Sherwood Homes South Ltd.
23CD-20202	Beatty Line North, Fergus	Centre Wellington	Under Review	Draft Plan of Condominium (Vacant Land, Common Elements Road)	30	0	0	Applicant: Jennark Homes.
23CD-23003	820 St. David Street, Fergus	Centre Wellington	Under Review	Draft Plan of Condominium (Standard)	0	0	45	5-storey mixed-use building; unit-type breakdown within apartment count not specified. Applicant: Asdin Hospitality Ltd.
23T-23005	Part Lot 12, Concession 7, Belwood	Centre Wellington	Under Review	Draft Plan of Subdivision	107	0	0	PDF confirms 100% single-detached, 107 units. Applicant: BelCal Inc.
OP-2025-09	650 Victoria Terrace; Part Park Lot 14 & 15, Plan 55, Fergus	Centre Wellington	Under Review - Not Considered	Official Plan Amendment (Employment Area to Delineated Build-up Area, mixed residential/commercial)	0	192	0	Also includes 11 commercial units (not counted above); density stated as 41 units/ha; not paired with a Draft Plan of Subdivision file. Applicant: 2566201 Ontario Inc.

urban Metrics

A7 CMHC Completions Data

Since 2021 Q3 (Census) - adjusted for no data reported in Erin and Centre Wellington					% of Total Unit Type				% Mix Within Local Municipality			
	Single & Semi	Row	Apartment	Total	Single & Semi	Row	Apartment	Total	Single & Semi	Row	Apartment	Total
Guelph	462	391	2,050	2,903	22.7%	54.2%	73.6%	52.3%	15.9%	13.5%	70.6%	100.0%
Centre Wellington	904	223	296	1422	44.4%	30.8%	10.6%	25.6%	63.6%	15.7%	20.8%	100.0%
Guelph Eramosa	82	0	20	102	4.0%	0.0%	0.7%	1.8%	80.4%	0.0%	19.6%	100.0%
Puslinch	136	0	1	137	6.7%	0.0%	0.0%	2.5%	99.3%	0.0%	0.7%	100.0%
Erin	148	0	1	149	7.3%	0.0%	0.0%	2.7%	99.3%	0.0%	0.7%	100.0%
Subtotal	1,732	614	2,367	4,713	85.0%	85.0%	85.0%	85.0%				
stimate - Rest of Wellington CD	306	108	418	832	15.0%	15.0%	15.0%	15.0%				
Total	2,038	722	2,785	5,545	100%	100%	100%	100%				

urban Metrics

	Centre Wellington				
	Single	Semi	Row	Apartment	Total
2012/Q1	16	0	5	0	21
2012/Q2	18	6	4	53	81
2012/Q3	24	2	4	0	30
2012/Q4	20	2	4	0	26
2013/Q1	20	0	0	0	20
2013/Q2	18	2	9	7	36
2013/Q3	26	0	4	1	31
2013/Q4	19	0	24	2	45
2014/Q1	8	4	3	0	15
2014/Q2	14	0	0	0	14
2014/Q3	23	0	3	0	26
2014/Q4	31	0	4	0	35
2015/Q1	20	2	0	0	22
2015/Q2	10	0	0	0	10
2015/Q3	11	0	4	105	120
2015/Q4	10	0	0	0	10
2016/Q1	6	0	7	51	64
2016/Q2	26	2	0	0	28
2016/Q3	66	6	52	85	209
2016/Q4	47	0	0	0	47
2017/Q1	53	0	42	0	95
2017/Q2	54	0	0	0	54
2017/Q3	63	0	20	0	83
2017/Q4	72	0	0	0	72
2018/Q1	26	0	38	0	64
2018/Q2	27	6	0	0	33
2018/Q3	20	2	0	0	22
2018/Q4	9	0	0	0	9
2019/Q1	21	0	0	1	22
2019/Q2	48	0	0	0	48
2019/Q3	52	0	0	0	52
2019/Q4	61	0	18	0	79
2020/Q1	42	0	42	0	84
2020/Q2	38	0	0	0	38
2020/Q3	50	2	6	0	58
2020/Q4	51	0	0	0	51
2021/Q1	31	6	0	0	37
2021/Q2	24	2	0	0	26
2021/Q3	27	8	19	0	54
2021/Q4	41	2	50	69	162
2022/Q1	47	0	0	0	47
2022/Q2	64	0	0	0	64
2022/Q3	51	0	0	15	66
2022/Q4	0	0	0	0	0
2023/Q1	0	0	0	0	0
2023/Q2	0	0	0	0	0
2023/Q3	0	0	0	0	0
2023/Q4	0	0	0	0	0
2024/Q1	0	0	0	0	0
2024/Q2	0	0	0	0	0
2024/Q3	0	0	0	0	0
2024/Q4	0	0	0	0	0
2025/Q1	0	0	0	0	0
2025/Q2	0	0	0	0	0
2025/Q3	40	0	0	0	40
2025/Q4	101	128	0	0	229
2026/Q1	10	2	61	0	73
2026/Q2	8	2	0	112	122
Since 2021 Q3	389	142	130	196	857
Quarterly Average Pre 2022 Q4	33	1	8	9	51
Assumed Missing	359	14	93	100	565
Estimated Total Since 2021 Q3	748	156	223	296	1,422

urban Metrics