

MEMORANDUM

To: Jeffrey Schelling, Office of the Provincial Land and Development Facilitator

From: Stefan Krzeczunowicz, Michael Skelly

Date: December 6, 2024

Re: Joint Land Needs Analysis and Study – Summary of Stage 2 Findings

EXECUTIVE SUMMARY

This Joint Land Needs Analysis and Study evaluates land requirements for the City of Barrie and the Townships of Oro-Medonte and Springwater to accommodate growth to 2051, focusing on Employment Areas and Community Areas.

i. Employment Areas

- Barrie likely has sufficient Employment Area land to meet long-term demand through 2051, though a short-term gap exists in shovel-ready parcels. The City is prioritizing infrastructure expansion in South Barrie to address this issue. Annexation of additional lands would not resolve the immediate shortfall due to multi-year timelines for land use and infrastructure planning and development.
- South Barrie lands hold a competitive advantage over proposed boundary adjustment lands in Oro-Medonte and Springwater due to superior infrastructure, proximity to hubs, and fewer constraints.
- The need for Provincial investments, including highways and interchanges, underscores the necessity of infrastructure preceding the development of employment areas to accommodate industrial growth along the Highway 400 corridor.
- Both Oro-Medonte and Springwater have sufficient long-term Employment Area land to 2051. However, accelerated housing growth in Springwater's Midhurst Secondary Plan area may necessitate expedited designation of additional employment lands to maintain balanced community development.

ii. Community Areas

- Community Areas are centred around housing and the supporting infrastructure, services, and local retail employment necessary to sustain residential communities. Oro-Medonte and Springwater have sufficient Community Area land supply to meet their respective growth forecasts to 2051.
- While Barrie's need for Employment Area expansion is limited, the City will be facing challenges to accommodate its forecast residential growth within its existing Designated Greenfield Areas due to unachievable density assumptions. Addressing Community Area shortfalls is critical to meet forecasted housing demand.
- Future municipal boundary expansions, if required, should integrate both Community and Employment Area needs to foster balanced growth and complete communities and recognise the longer-term planning horizons to consider in such processes (i.e. beyond 2051). Comprehensive community planning is required.

iii. Options for Land Needs

- **Option 1 – Maintain Municipal Boundaries:** Growth would slow in Barrie, with some growth shifting to Oro-Medonte and Springwater, likely requiring regional coordination and servicing agreements. Slower growth in Barrie may be expected from the mid-2030s (residential) and mid-2040s (employment).
- **Option 2 – Adjust Municipal Boundaries:** Annexation of land to Barrie would address Community Area needs, requiring detailed evaluation of servicing, fiscal impacts, and environmental considerations. Under this option, provision should be made to address future Employment Area needs pre- and post-2051.

iv. Next Steps

Stage 3 of the Joint Land Needs Study, should it proceed, would analyze options based on:

- Infrastructure feasibility to service study area lands
- Short and long-term financial impacts
- Environmental considerations
- Alignment with long-term growth objectives of local municipalities and the County

The Stage 3 work would ensure a proactive approach to accommodating regional growth while promoting sustainable, balanced communities.

1. INTRODUCTION

The City of Barrie, the Township of Oro-Medonte, the Township of Springwater, and the County of Simcoe are engaged in facilitated discussions to develop mutually acceptable growth management solutions within their jurisdictions. To support this effort, the Minister of Municipal Affairs and Housing has tasked the Office of the Provincial Land and Development Facilitator with assisting the discussions to ensure alignment with Provincial priorities, including the creation of housing and opportunities for employment in the vicinity of Barrie/Springwater and Oro-Medonte/Barrie.

As part of this initiative, a Joint Land Needs Analysis and Study has been commissioned to assess the need for additional Employment Areas and/or Community Areas within the municipalities, focusing on a defined study area along the boundary of the City of Barrie and the Townships of Oro-Medonte and Springwater (see Map 1). The study will also evaluate options for accommodating potential growth. The findings will inform future facilitation efforts and decision-making.

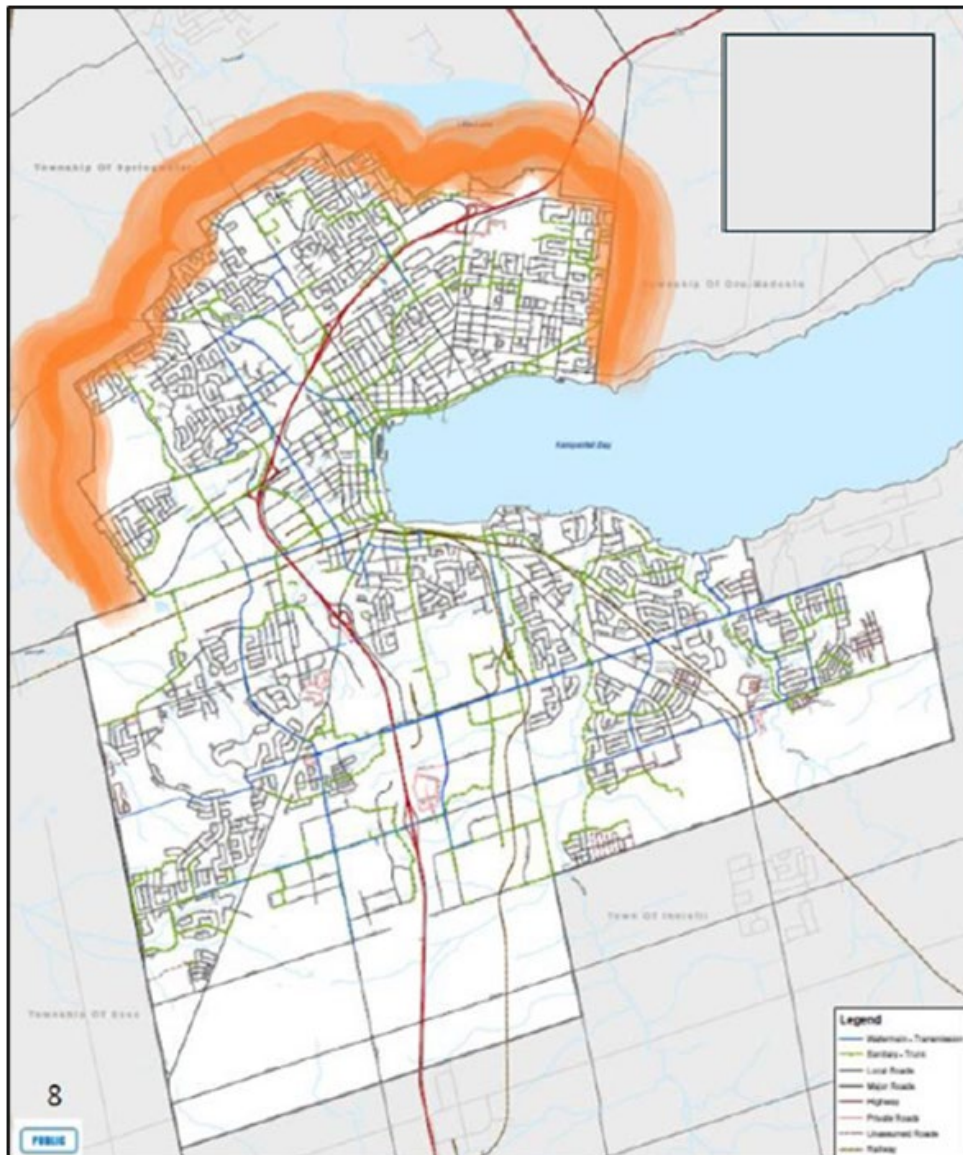
The study addresses two categories of land needs:

- **Community Areas:** centred around housing and the supporting infrastructure, services, and local retail employment necessary to sustain residential communities. Community areas include both Delineated Built-Up Areas and Designated Greenfield Areas, as set out in municipal official plans.
- **Employment Areas:** designated exclusively for employment-related activities, such as business parks and industrial areas. In the study area, employment areas are delineated in the official plans of the City of Barrie and County of Simcoe.

To conduct the Joint Land Needs Analysis, the County of Simcoe, through a Request for Evaluated Quotation (RFEQ) process and on behalf of the four participating municipalities, has retained Hemson Consulting. The study aims to address two key questions:

1. Do the City of Barrie and Townships of Oro-Medonte and Springwater require additional Employment Areas and/or Community Areas to accommodate growth to 2051?
2. If additional land is needed, what broad options are available within the study area to accommodate this growth?

Map 1 – Joint Land Needs Analysis Study Area



Source: City of Barrie, Township of Oro-Medonte, Township of Springwater, and County of Simcoe

The work plan for the Joint Land Needs Analysis, as outlined in the RFEQ, is divided into five stages.

- **Stage 1** focused on confirming the scope of work and finalizing the work plan in collaboration with the participating municipalities and the Provincial Land and Development Facilitator.
- **Stage 2** involves conducting a land needs assessment within the study area to evaluate the potential need for additional Employment Areas and/or Community Areas to accommodate forecasted growth to 2051.

This memorandum summarizes the findings from Stage 2, and outlines recommended next steps to advance the study.

The study has been a highly collaborative process, involving extensive consultation with elected officials and municipal CAOs and senior staff specializing in planning, infrastructure, and economic development from the four participating municipalities. The consultation schedule is outlined in Table 1. All meetings have been chaired by the Office of the Provincial Land and Development Facilitator.

Table 1 – Joint Land Needs Analysis and Study Consultation Schedule

Municipality	Date	Topic
All	November 14	Stage 2 findings
City of Barrie	August 27	Study parameters
	September 10	Infrastructure & planning staff
	October 3	Initial findings
Township of Oro-Medonte	August 28	Study parameters
	October 10	Initial findings
Township of Springwater	September 6	Study parameters
	October 16	Initial findings
County of Simcoe	September 3	Study parameters
	October 24	Initial findings

2. STUDY AREA GROWTH CONTEXT

The Census Division comprising the County of Simcoe and Cities of Barrie and Orillia presents unique challenges for regional planning.¹ The region is far larger than other areas in the Greater Golden Horseshoe and has the second-highest number of municipalities among Ontario Census Divisions. It faces complex growth dynamics, substantial growth pressures, and a diverse economy and settlement pattern. The County jurisdiction surrounds the two fast-growing separated cities of Barrie and Orillia, yet the opportunities for co-ordinated growth planning are limited by the lack of a formal regional planning framework.

The area in and around Barrie, particularly to the south, has been among the fastest growing regions in Ontario and Canada. It is forecast to accommodate significant population and employment growth to 2051. Ensuring an adequate long-term supply of land for both residential and employment purposes is crucial for the economic and social prosperity of all municipalities in the area.

i. Background Reports and Data Sources

This report reviews the Municipal Comprehensive Reviews (MCR) undertaken by the County of Simcoe and the City of Barrie between 2019 to 2022. MCRs were specific planning processes designed to bring municipal official plans into conformity with *A Place to Grow. Growth Plan for the Greater Golden Horseshoe* (Growth Plan), which was the prevailing Provincial plan at the time. Since then, the Growth Plan has been replaced by the *Provincial Planning Statement, 2024* (new PPS), which took effect on October 24, 2024. Under the new PPS, MCRs are no longer mandated, although the information generated by previous MCRs remains informative and relevant.

The MCRs established the overall framework for development and environmental management within the County and City, paving the way for more detailed local planning initiatives. These reviews were based on specific targets and forecasts, including minimum population and employment forecasts by 2051, minimum targets for housing intensification within a defined Built Up Area, and minimum densities of people and jobs within a defined Designated Greenfield Area.

¹ The Simcoe Census Division is the geographic area covering Simcoe County and the Cities of Barrie and Orillia. It is almost equivalent to the Simcoe Sub-Area previously defined in the Growth Plan but includes the First Nations reserves of Christian Island 30 and 30A and Mnjikaning First Nation (Rama First Nation).

- **Delineated built up area (BUA)** – all lands within a delineated built boundary. That is, lands within the limits of the developed urban area as defined by the Minister in consultation with affected municipalities for the purpose of measuring the minimum intensification target according to the Growth Plan.
- **Designated greenfield area (DGA or greenfield)** – lands within settlement areas (not including rural settlements) but outside delineated built up areas that have been designated in an official plan for development and are required to accommodate forecasted growth to 2051.

The MCRs involved detailed technical studies, including Land Needs Assessments (LNAs) conducted using a prescribed methodology to evaluate land needs to 2051.² These LNAs have been reviewed in light of recent development trends and updated data.

Key data sources for growth forecasts and LNAs include:

- Statistics Canada's 2016 and 2021 Census data;
- Statistics Canada's *Annual Demographic Estimates* (up to 2023);
- Canadian Mortgage Housing Corporation (CMHC) housing market data; and
- information set out in the MCR background reports including local building permit data, residential, employment and mixed-use land supply data, and development expectations for growth areas.

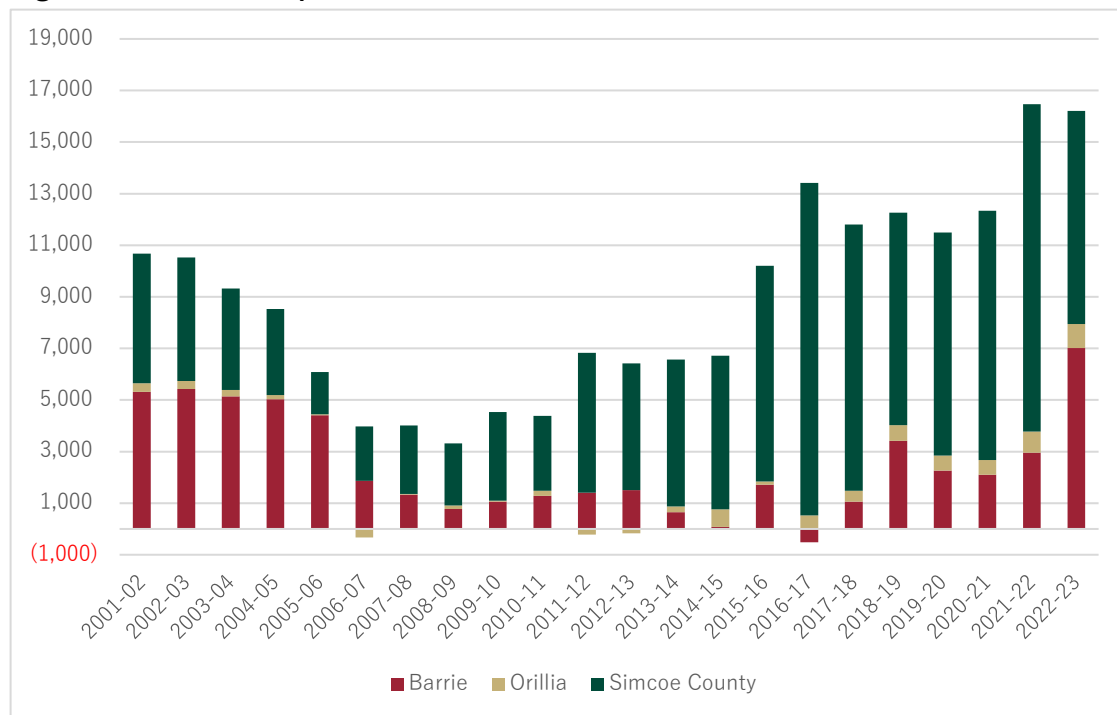
ii. Population Growth and Housing Market Dynamics

Growth in the study area is primarily driven by migration from the Greater Toronto Area (GTA). Key trends, as shown in Figures 1 and 2, include:

- **Pre-2006 Growth Boom:** Barrie was one of Canada's fastest growing urban communities, accommodating most growth in the Census Division and adding about 2,000 housing units per year during the late 1990s and early 2000s. Most of these units were single detached homes, reflecting the predominant housing demand of the time.

² *Land Needs Assessment Methodology for the Greater Golden Horseshoe, 2020*, released in accordance with Growth Plan policy 5.2.2.1 c).

Figure 1: Historical Population Growth in Simcoe Census Division



Source: Statistics Canada, Annual Demographic Estimates

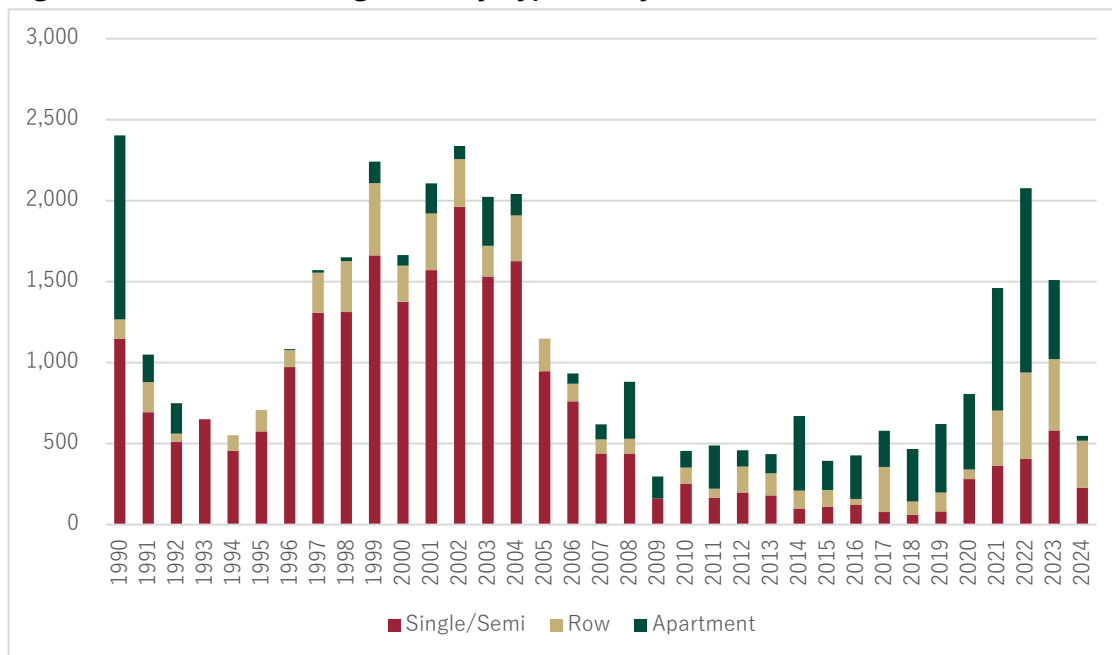
- **Post-2006 Slowdown:** By 2006-2007, Barrie had largely exhausted its supply of greenfield land, leading to a marked slowdown in growth. The 2008-2009 recession further curtailed housing development across the entire Census Division.
- **Post-Recession Shifts:** Growth in Barrie stalled during the recovery period, primarily due to ongoing greenfield land supply constraints. Regional housing demand shifted to surrounding County municipalities, which experienced dramatic population increases during this period.
- **Recent Developments:** The opening of new greenfield lands in Barrie's Salem and Hewitts Secondary Plan areas spurred renewed housing and population growth within the City and somewhat shifted growth away from surrounding County municipalities.³ Much of Barrie and the County's growth is from people moving from the GTA, so COVID-19 and the rise of remote work between 2020 and 2022 further accelerated population growth across the region. The extent to which growth rates will settle post-pandemic remains uncertain, particularly with recent Federal announcements to reduce national targets for permanent and, importantly, non-permanent residents and the recent housing affordability crunch (Figure 2 shows

³ Although annexed in 2010, servicing only started to become available in these areas within the last 5 years,

the effects of the housing affordability on housing construction in Barrie in 2023 and early 2024).

There has been a noticeable shift in the type of housing being constructed in Barrie (Figure 2). The early wave of Barrie's growth, prior to 2006, was dominated by single detached homes. A more balanced mix of housing types in recent years, including a higher proportion of rowhouses and apartments, reflects shifts in market demand and land-use policies.

Figure 2: Historical Housing Starts by Type in City of Barrie



Source: CMHC, Housing Starts

The interplay between Barrie's land supply and surrounding municipalities highlights the finite nature of regional housing demand: when Barrie's land supply decreases, housing construction increases in County municipalities, and vice versa.

Barrie maintains strategic advantages as a regional service center, offering key amenities such as hospitals and post-secondary institutions. These factors make it particularly attractive to specific segments of the housing market, including older adults seeking apartments in Barrie for downsizing and students attending higher education and job training institutions. However, urban settlement areas in the County are increasingly planning to accommodate retirees, offering more housing options for older adults to downsize within their communities. This evolving dynamic may challenge Barrie's current competitive edge in the regional apartment market in the coming years.

iii. Employment Growth and the Local Economy

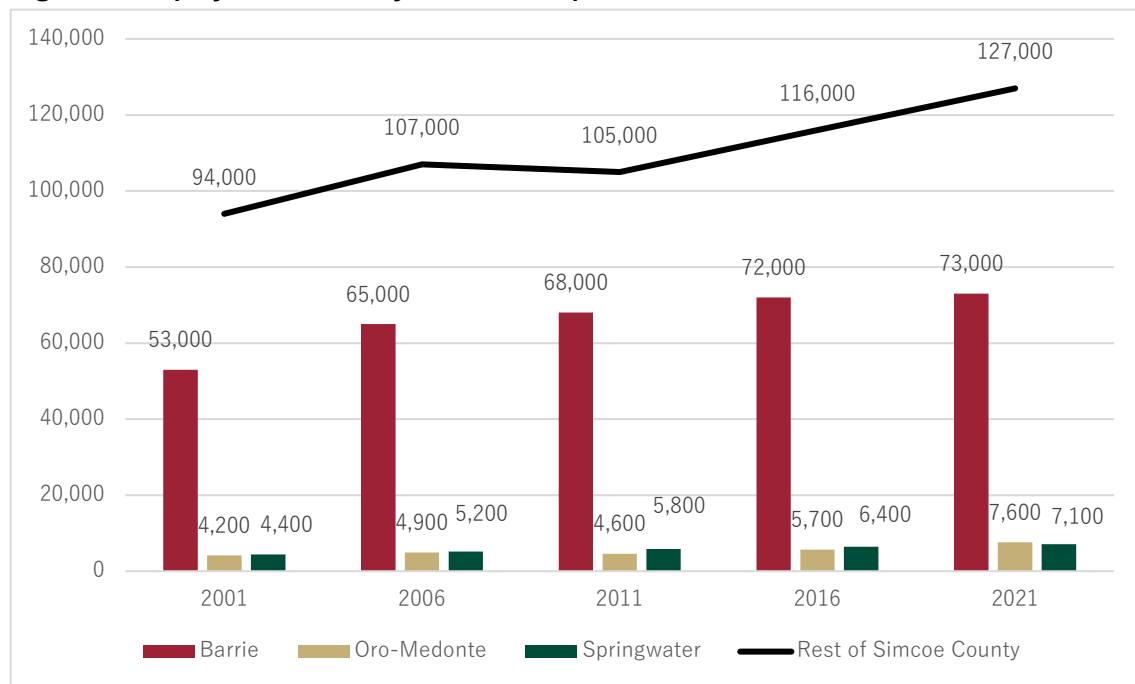
Regional growth management is not solely about planning for population growth and housing; it also involves strategic planning for employment lands. Well-located employment lands are crucial for maximizing job opportunities and enabling residents of the study area to work closer to home. This aligns with the goal of creating “complete communities”, a vision supported by the County and City Official Plans, which anticipate employment growing at a faster rate than population over the next 25 years in most areas.

Simcoe’s proximity to the GTA, connected via Highway 400, positions it uniquely for economic development. Highway 400, arguably Ontario’s second most critical highway, serves as the principal corridor linking Southern and Northern Ontario, as well as western trade routes. This key infrastructure not only facilitates commuter mobility to York Region and Barrie but also supports the development of strategic employment lands, both north and south of the City.

The Simcoe Census Division has experienced steady job growth since the mid-1980s, despite being influenced by global and regional economic forces. Like much of Ontario, employment declined sharply during the 2008–2009 recession (see Figure 3). While the initial jobs recovery was quite swift in 2010 and 2011, the first several years of the post-2011 employment expansion was relatively slow.

The pandemic caused a sharp but short-lived economic shock in the region, with employment losses amounting to 10% of the County workforce and 8% of Barrie’s workforce in 2019-2020. Despite these losses, the region’s total employment has generally rebounded to pre-pandemic levels with its recovery trajectory reflecting broader provincial trends.

Figure 3: Employment in Study Area Municipalities



Source: Statistics Canada, Census 2001-2021

Employment growth continues to occur in sectors of the local economy that store or distribute goods or provide support services (such as professional, scientific and technical services, and real estate) along with manufacturing and various population-serving activities such as retail trade. Many of these activities require (or prefer) single storey facilities on large, segregated industrial or business park sites, preferably with municipal and water and wastewater services. Such land extensive sites offer easy access to major transportation routes, the opportunity to build large buildings for storing goods and equipment, and the necessary road design for turning and unloading trucks.

Employment Areas accommodate these types of activity, primarily in low-rise industrial-type buildings. These activities have distinct locational needs, including:

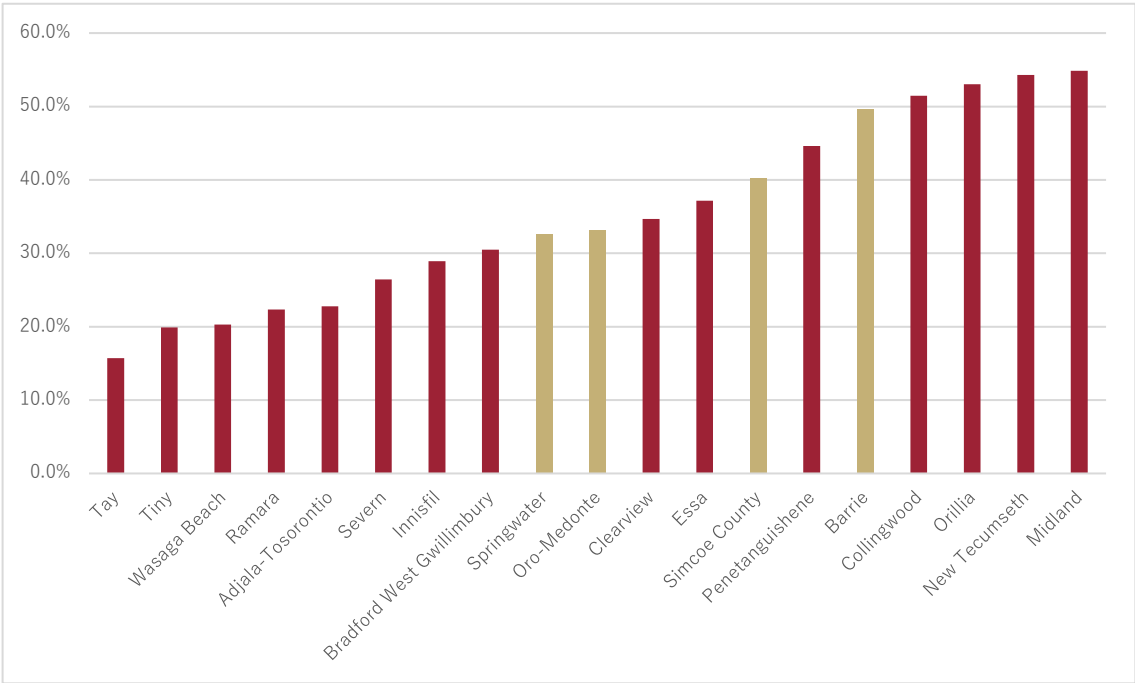
- proximity to major highways and transportation corridors for market access,
- availability of a local labor pool,
- large, flat land parcels suitable for development,
- opportunities for business clustering to promote synergies within related industries, and
- separate from sensitive uses that may be affected by operations.

In this regard, Employment Areas located near Highway 400 offer excellent connectivity and logistical advantages.

A key planning objective of the County and City Official Plans is to develop “complete communities.” These are communities where residents can work close to home, reducing reliance on extended commuting. One common measure of completeness is the activity rate, which represents the ratio of jobs to residents in a municipality. However, this metric can be influenced by municipal geography. High activity rates are typically seen in highly urbanized municipalities like Collingwood (54%) and Barrie (50%). Low activity rates are found in rural municipalities with few urban centers, such as Springwater (33%) and Oro-Medonte (33%). Additionally, activity rates can be disproportionately high in areas with large employers, such as New Tecumseth (60%), home to the Honda plant, and Penetanguishene (52%), host to the Waypoint Centre for Mental Health and the Central North Correctional Centre (see Figure 4).

An activity rate of about 50% generally represents a balance between jobs in a community and the number of residents of a community that are employed.

Figure 4: 2021 Activity Rates for Municipalities in the Simcoe Census Division



Source: Statistics Canada, 2021 Census

3. BARRIE'S EMPLOYMENT AREA LAND NEEDS

The City of Barrie's LNA was set out in three reports issued between 2019 and 2021 as part of the City's MCR. This section reviews the findings of those reports and evaluates Barrie's long-term Employment Area land supply.

i. LNA Report 1 – Long-Term Urban Land Needs Study to 2041 (May 2019)

The first report, the Long-Term Urban Land Needs Study released in May 2019, identified a need for an additional 116 hectares of Employment Area by 2041, as shown in Table 2.

Table 2: City of Barrie Employment Area Land Need – May 2019

Determination of Employment Area Land Need	
Employment Area Jobs Forecast at 2041	44,780
Jobs Accommodated in Existing Employment Areas at 2041	40,700
Jobs Requiring New Employment Area at 2041	4,080
Target Density of New Employment Area	35 jobs per gross developable ha
New Employment Area Land Need	116 ha

Source: MCR, Long-Term Urban Land Needs Study, City Barrie, prepared by Watson & Associates with Dillon Consulting Limited and Tate Economic Research Inc., May 21, 2019

The additional 116 hectares were proposed to be accommodated within 273 hectares of Designated Special Rural Area lands along Highway 400 at Barrie's southern edge. These lands, though within the City's municipal boundary, were outside the urban boundary at the time. They have since been brought into the City's settlement area (see Map 2).

In general, the methodology and assumptions in the 2019 study align with the Province's LNA Methodology of that period. However:

- **Employment Density Assumptions:** The target density of 35 jobs per hectare for new Employment Areas in the Designated Special Rural Area is nearly 60% higher than Barrie's observed density of 22 jobs per hectare in 2018. It is also 13% higher than the City's Official Plan target of a minimum of 31 jobs per hectare for new development (Policy 2.3.5.g). While the report justifies this higher density based on densities associated with recently developed employment uses, known developments in the near-term, and a wider range of uses on new Employment

Areas (including multi-tenant and some major office uses), it lacks specific examples of developments to sustain this assumption.⁴

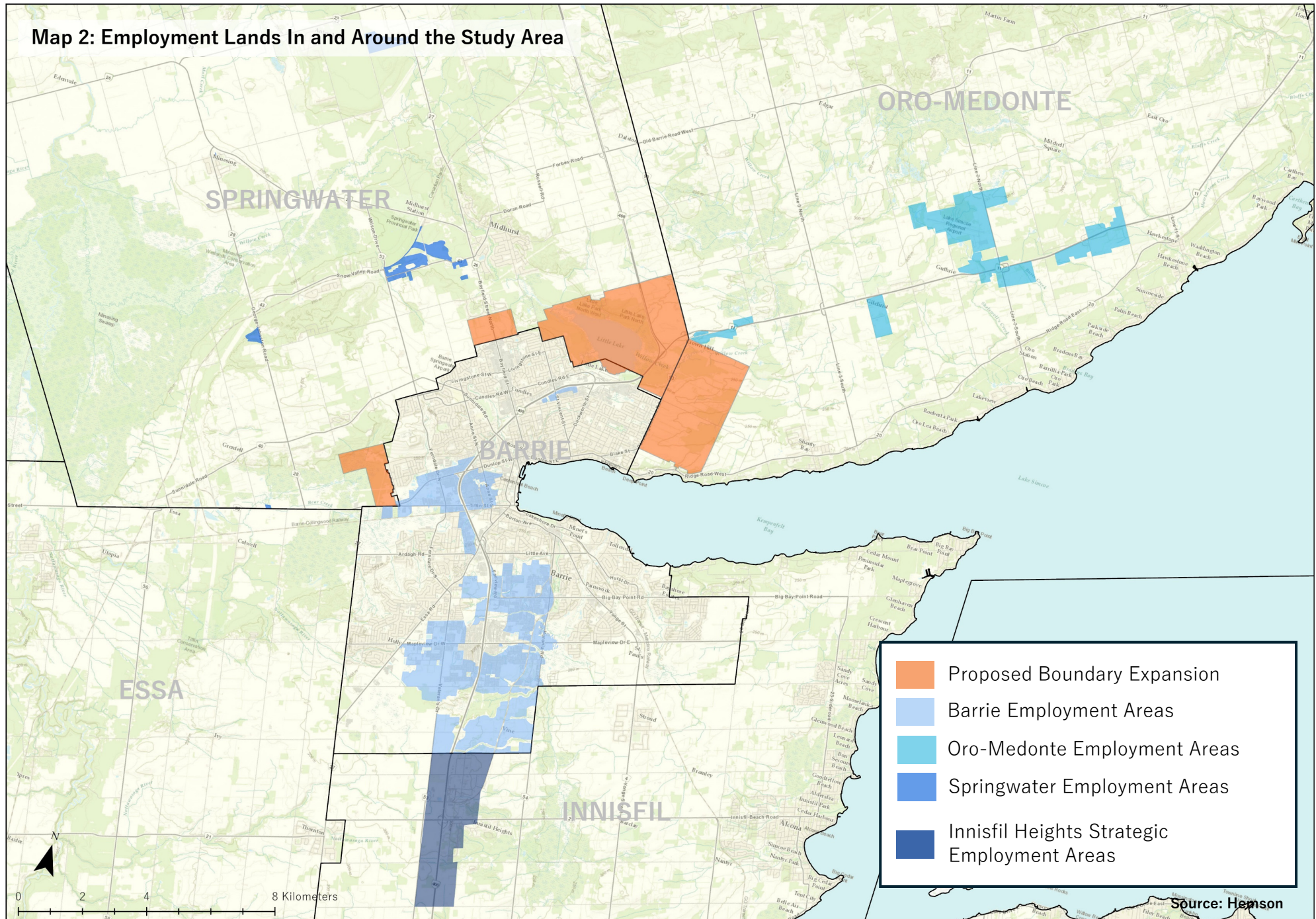
- **Employment Intensification:** The report assumes 8% of Employment Area jobs will be accommodated through intensification on existing underutilized lands, a reasonable estimate given recently observed development trends in Barrie and a review of potential intensification sites in the City. However, by 2051, this level of intensification is expected to amount to less than 5% of the City's total employment base, consistent with patterns observed in larger Employment Areas in the GTA.

ii. LNA Report 2 – Addendum Long-Term Urban Land Needs to 2041 (May 2020)

The second report, released in May 2020 (Addendum Report), responded to Employment Area conversions that reduced the land supply by 53 gross hectares. This change increased the Employment Area land need to 170 gross hectares by 2041. The assumptions from the 2019 report otherwise remained unchanged.

⁴ The report appears to have applied the Official Plan density target for growth on vacant employment lands within the City's existing urban boundary. However, the higher target was used only for lands within the Designated Special Rural Area. It is important to note that the 35 jobs per hectare target represents a "gross density" measurement, which accounts for all developable land, including both privately-owned parcels and public-owned lands (e.g. local roads and utilities), but excluding environmental features. When converted to a "net density", which considers only the area of private lots, the equivalent would be approximately 41 jobs per net hectare.

Map 2: Employment Lands In and Around the Study Area



iii. LNA Report 3 – Final Land Needs Assessment to 2051 (May 2021)

In 2021, the Province extended the forecast horizon of the Provincial *Growth Plan for the Greater Golden Horseshoe* (Growth Plan) from 2041 to 2051. As a result, Barrie's employment forecast increased from 129,000 jobs in 2041 to 150,000 jobs in 2051. In response, the City prepared a final LNA report in 2021 (2021 Memorandum). Of the 21,000 additional jobs forecast, 580 were allocated to existing Community Areas, 14,940 jobs were deemed "population-related" and assigned to Community Areas, and 5,481 were allocated to Employment Areas.

The remaining Employment Area jobs were assigned to 145 hectares of vacant land in the Designated Special Rural Area, using same density target of 35 jobs per hectare. This allocation aligns with assumptions in previous reports but raises the following issues:

- **Unclear Land Supply Calculation:** The transition from 273 hectares of Designated Special Rural Area in earlier reports to 145 hectares in the final 2021 Memorandum is not fully explained. Subtracting the 170-hectare Employment Area land need (from the 2020 Addendum) would leave 103 hectares, not 145 hectares.
- **Population-Related Job Ratios:** The assumed ratio of population-related jobs to population growth to 2051 is approximately 1 job per 3 residents, higher than the typical ratio of 1 job per 4-5 residents in mid-size cities like Barrie. This higher ratio may reflect increased major office employment from 2041 to 2051 but requires further analysis.
- **No Adjustment for Long-Term Vacancy:** The LNA does not appear to account for long-term vacancy in Employment Areas. Most municipalities assume approximately 5% of employment lands will remain vacant due to various constraints (e.g. small size, awkward configuration). Applying this adjustment in Barrie would increase the Employment Area land need beyond what the LNA identifies for 2051.

On balance, while certain assumptions in Barrie's LNA could be revised, such adjustments would likely result in only a minor increase in the City's Employment Area land need over the next 25 years. The LNA methodology and findings are fundamentally reasonable and defensible. However, given the high densities assumed for new and existing vacant Employment Areas and the apparent lack of a long-term vacancy adjustment, the calculated Employment Area land need likely represents the minimum required to meet Barrie's employment growth forecasts to 2051.

iv. Review of Barrie’s Employment Area Land Supply

The Employment Area land supply assessed in the City’s LNA was initially estimated as of January 2018, with adjustments made for approved employment land conversions. To update this, Hemson conducted a desktop analysis, supplemented by site visits to all vacant land parcels, providing a revised estimate as of mid-year 2024 (see Map 3 and Appendix A). All parcels designated for Employment were identified from the City’s Official Plan. Vacant parcels were identified using MPAC property codes and ortho-photography.

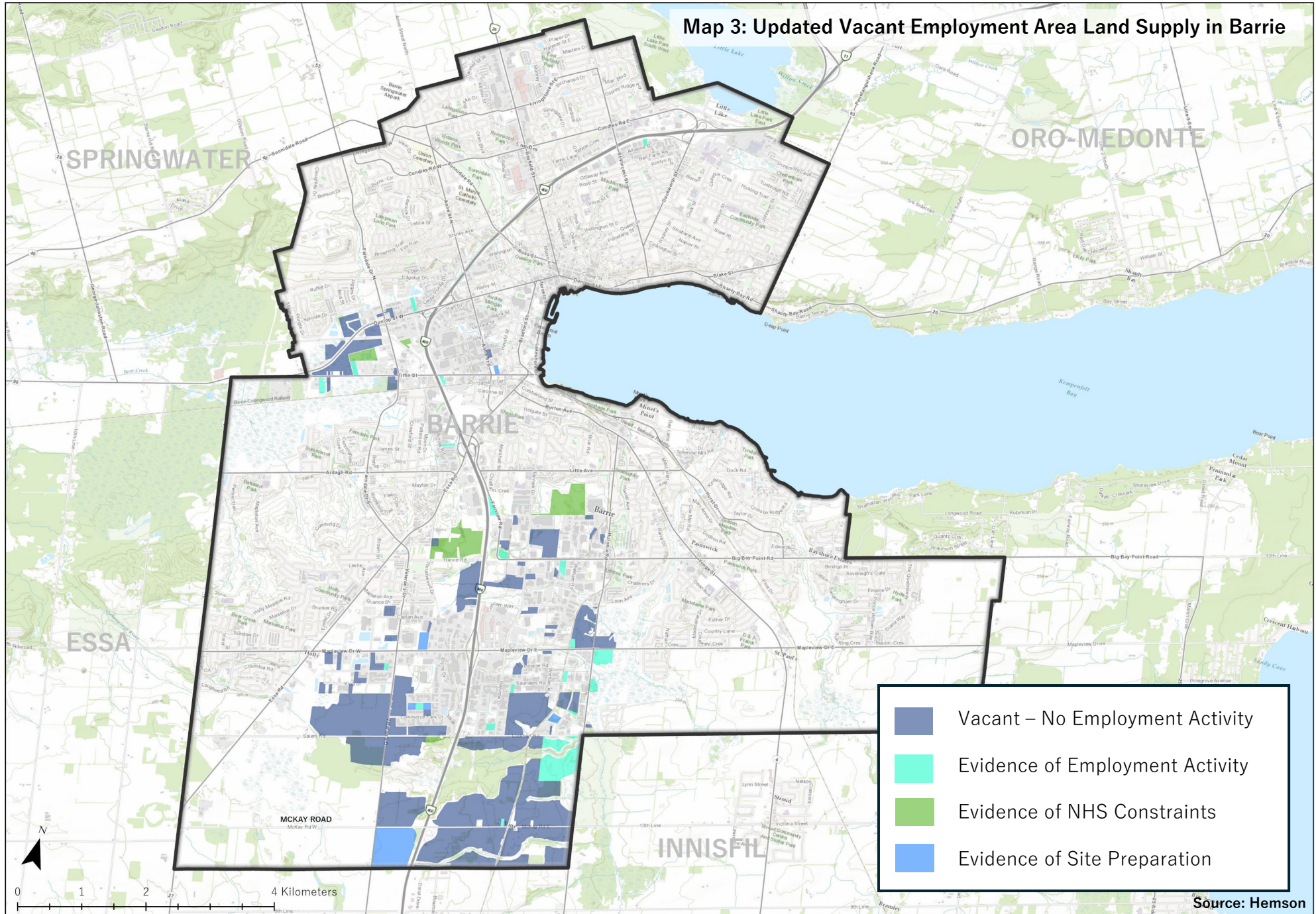
The updated estimate identifies a total Employment Area land supply of 793 hectares, slightly higher than the City’s 2018 LNA estimate. This analysis excludes parcels smaller than 0.5 hectares and identifies potentially constrained areas based on topographical or environmental features, which account for approximately 7% of the total supply. Table 3 summarizes these findings.

Table 3: City of Barrie Employment Area Land Supply Estimates (gross ha)

City of Barrie LNA Estimates – 2018	Hemson 2024 Estimates
▪ Vacant designated employment land – 472 ha (adjusted for conversions) ▪ Estimated additional employment land need to 2041 – 170 ha ▪ Additional land need to 2051 – 145 ha	▪ Vacant – No employment activity – 627 ha ▪ Vacant – Evidence of employment activity – 59 ha ▪ Vacant – Topographical or NHS constraints – 59 ha ▪ Vacant – Evidence of site preparation – 48 ha
Total vacant employment land: 787 ha	Total vacant employment land: 793 ha

Source: MCR, Long-Term Urban Land Needs Study, City Barrie, prepared by Watson & Associates with Dillon Consulting Limited and Tate Economic Research Inc., May 21, 2019; Addendum Report May 19, 2020 and Dillon Consulting Memo, May 5, 2021; Hemson Consulting (2024).

Map 3: Updated Vacant Employment Area Land Supply in Barrie



Source: Hemson

While accurate estimates of employment growth on designated Employment Areas since 2018 are challenging due to disruptions in data collection during the COVID-19 pandemic, the 2023 updated employment land supply appears sufficient to meet forecasted demand to 2051. More specifically:

- **Shovel-Ready Employment Lands:** The 2019 Long-Term Urban Land Needs Study estimated that 276 gross hectares (53%) of the City’s designated Employment Areas were “shovel ready” with available water and wastewater servicing as of January 1, 2018. However, by 2021, the City identified a shortage of larger shovel-ready parcels (10+ acres).⁵ This lack of supply prompted the implementation of an Employment Land Strategy aimed at expediting servicing to five key areas with the highest potential to address the shortfall. While efforts to accelerate servicing are still ongoing, City staff maintain that, while long-term supply of designated Employment Area is theoretically sufficient, there remains a shortage of short-term supply of larger, serviced land parcels that are market-ready. Anecdotal evidence suggests that businesses seeking to locate in Barrie, as well as existing employers planning expansions, face limited options due to the lack of adequately serviced and available land parcels.
- **South Barrie Employment Lands:** A significant portion of the City’s vacant employment lands is located in South Barrie, south of Maplevue Drive, including areas in the Salem Secondary Plan area and lands within Barrie’s former urban boundary. These areas offer flat topography, good access to Highway 400 once an interchange is built, and flexibility in parcel sizes and configurations. There are environmentally constrained areas within the South Barrie lands. However, they do not restrict the ability to provide for the clustering of multiple land parcels of 10+ acres under a range of configurations.

Servicing for these lands is planned through the City’s infrastructure master plans, with City-wide development charges and an area-specific development charge already in place to pay for required water, wastewater, transportation and other growth-related infrastructure.

The servicing delay for the Salem lands appears to be primarily linked to wastewater infrastructure and the need for a funding agreement with local

⁵ Staff Report, “Barrie Employment Lands Strategy and Considerations”, April 19, 2021, p.2 (“there is a lack of available supply on the market”).

developers. In 2021, a funding agreement was reportedly reached,⁶ enabling the approval of a “big pipe” that designed to allow for the build-out of the Salem area over the next 10 to 15 years. Additionally, developers in the area were working on constructing a pumping station to accelerate development timelines, potentially reducing the anticipated seven-year wait for the big pipe’s completion. These reports suggest that servicing for the Salem lands would likely be well underway by the late 2020s. Furthermore, based on the timing outlined in the City’s DC Study, the area is expected to be fully serviced well in advance of 2041.

- **Opportunities for Clustering:** South Barrie’s Employment Areas, including those in the secondary plan areas as well as the lands added through the former Designated Special Rural Lands, provide the City with the best opportunity for a “full service” employment cluster, including large industrial developments with highway and rail access. Site visits in August 2024 reveal that there are properties in the area of McKay Road and Highway 400 that are currently being marketed for industrial development.
- **Strategic Importance of Highway 400 Corridor:** The Highway 400 corridor plays a critical role in supporting economic growth, with key employment areas strategically located along its route. Just south of Barrie lies the Innisfil Heights Strategic Settlement Employment Area (see Map 2), an established and expanding employment hub identified as a Strategic Settlement Employment Area in the Growth Plan and County Official Plan. This designation reflects the Province and County’s recognition of its strategic significance for economic development. According to the Growth Plan, Strategic Settlement Employment Areas are defined as areas “...to be planned and protected for employment uses that require large lots of land and depend upon efficient movement of goods and access to Highway 400.”

The Innisfil Heights employment lands complement the South Barrie employment lands; together they offer a diverse range of options for businesses requiring good connectivity to suppliers and markets in the GTA and beyond. Further south on Highway 400, centred at County Road 88, is the Bradford West Gwillimbury Strategic Settlement Employment Area, also identified in the Growth Plan and County Official Plan. This designation further underscores the Province and County’s emphasis on the Highway 400 corridor as a critical economic zone for supporting industrial and commercial activities reliant on efficient transportation and logistics networks.

⁶ “South-end Barrie land poised for huge development once home to International Plowing Match”, *Innisfil Today*, July 30, 2021.

- **Future Opportunities:** Planned improvements, such as the McKay Road interchange at Highway 400, slated for 2034, will further enhance South Barrie's attractiveness as an employment hub, enabling large industrial developments and improved connectivity.

In conclusion:

- Barrie's long-term Employment Area land supply is adequate to meet demand to 2051, with a sufficient serviced supply to address medium and long-term needs. Although the City's LNA appears to have slightly underestimated the long-term Employment Area land need, additional supply to accommodate long-term vacancy and parcel choice in the market can be reviewed every 10 years while extending the planning horizon out another 10 years.
- Barrie has a short-term gap in market-ready employment lands. While the City identified 276 hectares of serviced land in 2018 as sufficient to meet immediate needs, it has acknowledged a critical shortage of large, shovel-ready parcels suitable for non-residential development. To resolve this constraint, Barrie is implementing a targeted plan to accelerate the extension of linear infrastructure in key areas within South Barrie, focusing on unlocking larger parcels for market use.
- While acquiring additional lands outside Barrie for employment purposes might seem like a solution, this approach would not address the short-term supply issue. Activating additional lands for employment activity would involve lengthy timelines for planning, servicing, and development, rendering it ineffective as an immediate solution.
- Although there is some uncertainty as to the exact timing of servicing of all of the South Barrie Employment Areas, Council has demonstrated its clear intent, through the Employment Lands Strategy, master plans and DC studies, to extend full services prior to 2041 and as early as the next 5-10 years.
- The designation of Innisfil Heights and Bradford employment lands as Strategic Settlement Employment Areas, coupled with significant Provincial transportation investments in Highway 413, the Bradford By-Pass, and construction of Highway 400 interchanges (including one slated for the South Barrie employment lands), underscores the Provincial commitment to fostering industrial growth along the Highway 400 corridor between Barrie and the GTA.

4. ORO-MEDONTE'S EMPLOYMENT AREA LAND NEEDS

By leveraging the strategic advantages of the area around the Lake Simcoe Regional Airport area, the Township of Oro-Medonte can position itself as a key hub for economic activity within the County. This section reviews the LNA prepared for the Township as part of the County of Simcoe MCR.

i. Future Development of Employment Areas in the Township

Under the County MCR, all currently designated Employment Areas in the Township are projected to be fully developed by 2051. Among these, the parcels surrounding the Lake Simcoe Regional Airport are the most desirable from a site selection perspective due to their strategic location and designation as an Economic Employment District in the County Official Plan. It is expected that the airport-adjacent parcels will develop at higher densities compared to other employment lands in the Township. Across all vacant Employment Areas, an overall density of 19 jobs per hectare is anticipated; this assumption is premised on all areas remaining without municipal servicing over the period to 2051. Should servicing be extended to these Employment Areas, the Township's job growth potential would be higher. Under the County OP, the Township's activity rate is forecast to increase from 33% to 36% by 2051.

Table 4 provides a breakdown of the different types of vacant employment lands within the Township and outlines the corresponding job growth forecasts associated with these parcels.

Table 4: Oro-Medonte Employment Area Supply-Demand Summary

Long-Term Land Supply (ha)	62.1
Provincial Economic Employment District (ha)	64.4
Total Land Supply (ha)	126.6
Assumed Employment Area Density (jobs/ha)	19
Employment Area Capacity (jobs)	2,359
Employment Area Employment Growth, 2021–2051 (jobs)	2,359
Sufficiency of Supply (ha)	(0.0)

Source: Simcoe County MCR

Oro-Medonte has other designated Employment Areas along Highway 11 (see Map 4). Together with the airport area, these areas offer significant advantages. First, the Township's Official Plan permits manufacturing, warehousing and distribution, research and development facilities, transportation terminals and other uses, allowing for a broad range of economic activity. Second, the area around the airport hosts significant industrial projects such as an automotive business park and motorsport club under development comprising 500,000 square feet of industrial space related to automotive research, engineering and development. This development was facilitated by a Minister's Zoning Order. Finally, the Township has more than 125 hectares of employment land along the Highway 11 corridor.

ii. Review of Suitability of Boundary Adjustment Lands in Oro-Medonte for Employment Area Uses

Barrie has proposed to expand its urban boundary to include lands in Oro-Medonte, northeast of the City, to address Employment Area needs. The proposed boundary adjustment area encompasses approximately 772 gross hectares, as shown in Map 5 (the "boundary adjustment lands"). The rationale for this proposal includes assertions that:

- Barrie has an insufficient supply of vacant serviced industrial lands within its current municipal boundary; and
- Barrie is well-positioned to provide water, wastewater and transportation infrastructure for the boundary adjustment area.

This section analyzes these assertions.

A Township staff report of February 14, 2024⁷ identifies key characteristics of the proposed boundary adjustment lands:

- **Land designations:** Approximately 40% of the area has a Greenlands designation in the Township Official Plan with the remainder split between agricultural and rural designations. The Greenlands contain watercourses and floodplains regulated by the Nottawasaga Valley Conservation Authority. The southwest quadrant of the area is subject to Policy 2.6.11 in the Township Official Plan which provides

⁷ Township of Oro-Medonte Report No. DS2024-017, February 14, 2024, City of Barrie Proposed Boundary Expansion.

Map 4: Designated Employment Areas in Oro-Medonte

Oro-Medonte Land Use Designations

- Employment Areas

0 1 2 4 Kilometers

Source: Hemson

Oro-Medonte Land Use Designations

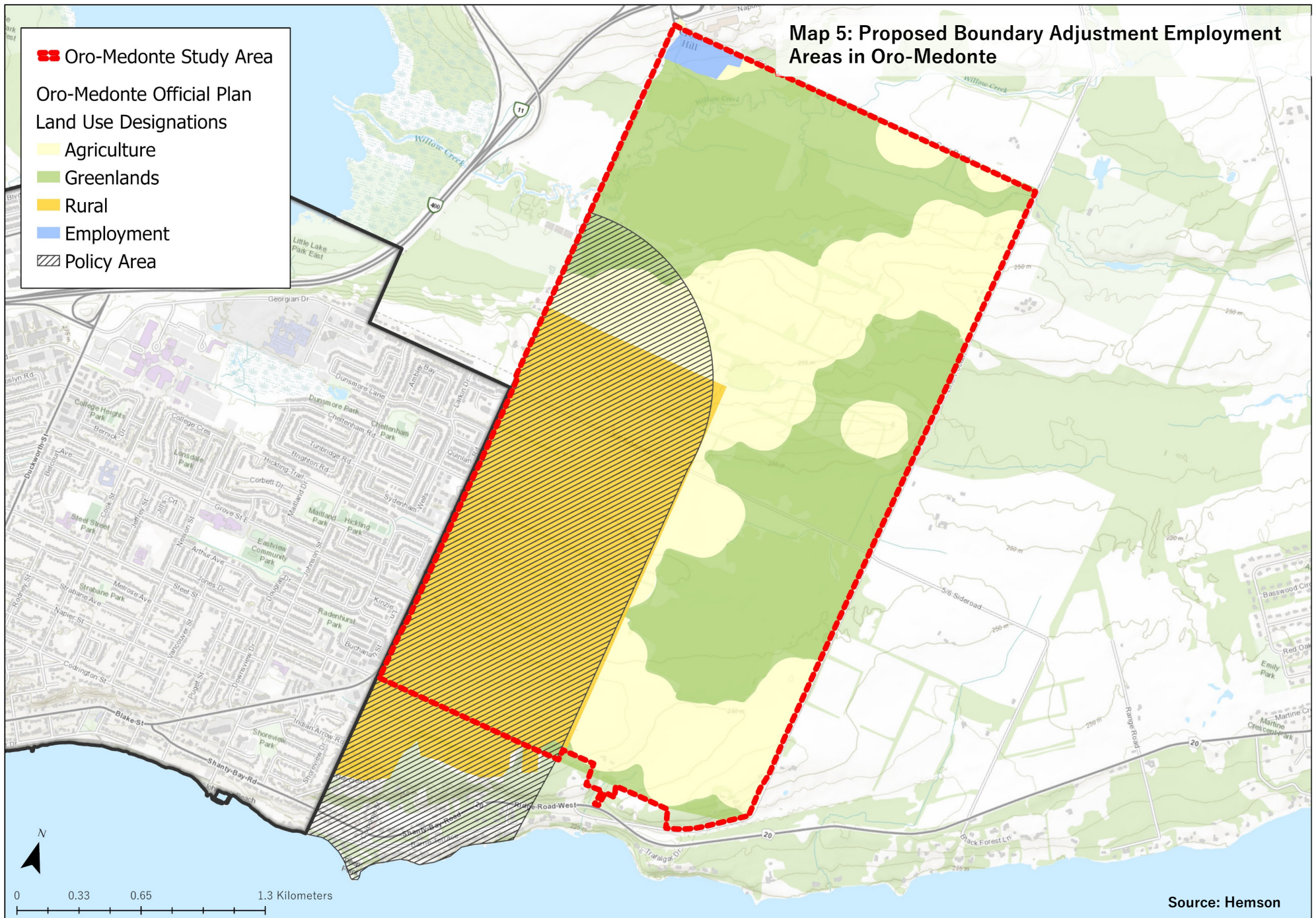
■ Employment Areas

Source: Hemson

- agricultural policies for areas adjacent to urban development in neighbouring municipalities.
- **Existing uses:** A small area (5 hectares) at the northern edge of the boundary adjustment lands is designated for employment uses as part of the Township's designated Employment Areas along Highway 11 and is occupied by the Napoleon Logistics Centre. The agricultural lands are actively farmed. Other existing uses include a winery, with associated event centre, and a place of worship.
- **Adjacent uses:** The lands are bordered by:
 - residential development to the west in the City of Barrie, along Penetanguishene Road;
 - waterfront residential development to the south;
 - one of the Township's Employment Areas to the northwest; and
 - rural and agricultural uses to the north and east, including a golf course.

There are several key challenges with developing the proposed boundary adjustment lands as an Employment Area:

- **Distance from existing employment hubs:** the lands are far from Barrie's main Employment Areas, which are concentrated in the southern and central parts of the City.
- **Truck traffic and infrastructure concerns:** Development would increase truck traffic through existing interchanges at Penetanguishene Road and Highway 11 and potentially also through a limited access point to Highway 11 at Line 1S. Potentially significant interchange upgrades may be required because of the sharp turning circle of the Highway 11 off ramps, the T-junction where the ramps meet Penetanguishene Road, the presence of a church and cemetery adjoining the T-junction, and the presence of a road tunnel for Penetanguishene Road under the highway at this location.
- **Environmental constraints:** While the topography of the proposed boundary adjustment lands is relatively level with some modest rolling hills, as stated above a



large share of the identified lands would be undevelopable, about 40% of the total area.

- **Lack of Servicing:** Like any rural land proposed for urban development, there is currently no municipal water or wastewater servicing available, although there is municipal servicing available at Penetanguishene Road in the City of Barrie. Moreover, roads are at a rural level of service and would require upgrading for urban type uses and heavy truck traffic.

iii. Comparison of Boundary Adjustment Lands and South Barrie

A high-level assessment of the proposed Oro-Medonte boundary adjustment lands versus South Barrie employment lands (Table 5) highlights the following:

- **South Barrie advantages:** Proximity to established Employment Areas, better infrastructure, and alignment with planned economic activities make South Barrie superior for employment land development.
- **Oro-Medonte limitations:** The boundary adjustment lands face significant barriers, including undevelopable areas, distance from major employment clusters, and potential land-use conflicts with adjacent residential areas.

Table 5: Comparison of Site Selection Factors for Employment Land Users

Factor	Proposed Oro-Medonte Boundary Adjustment Lands	South Barrie Employment Lands
Access to labour – within Barrie and across Simcoe County	✓	✓
Proximity to other established Employment Areas – supplier links		✓
Does the location complement planned employment uses nearby?		✓
Proximity to a strategic economic Employment Area		✓
Does the location serve businesses in a rural area, benefitting from separation/distance from urban lands	✓	
Direct/proximate access to Highway 400		✓
Visibility on arterial highways		✓
Accessibility to transportation infrastructure such as rail lines or an airport	✓	

Factor	Proposed Oro-Medonte Boundary Adjustment Lands	South Barrie Employment Lands
Area large enough to provide opportunities for significant contiguous blocks of land	✓	✓
Area can accommodate land-extensive users	✓	✓
Existing uses that can be leveraged for spin-off impacts		✓
Lack of physical features that could preclude/inhibit development		✓
Can land use conflicts be managed/avoided		✓
Location conducive to attracting target employment sectors		✓
Opportunity for servicing	✓	✓

Source: Criteria developed from Cushman and Wakefield, Decision-Making Factors – from Economic Strategy – Real Estate Market and Site Selection Perspectives, prepared for the County of Simcoe, March 2022

5. SPRINGWATER'S EMPLOYMENT AREA LAND NEEDS

This section reviews the Employment Area LNA prepared for the Township of Springwater as part of the Simcoe MCR.

i. Future Development of Employment Areas in the Township

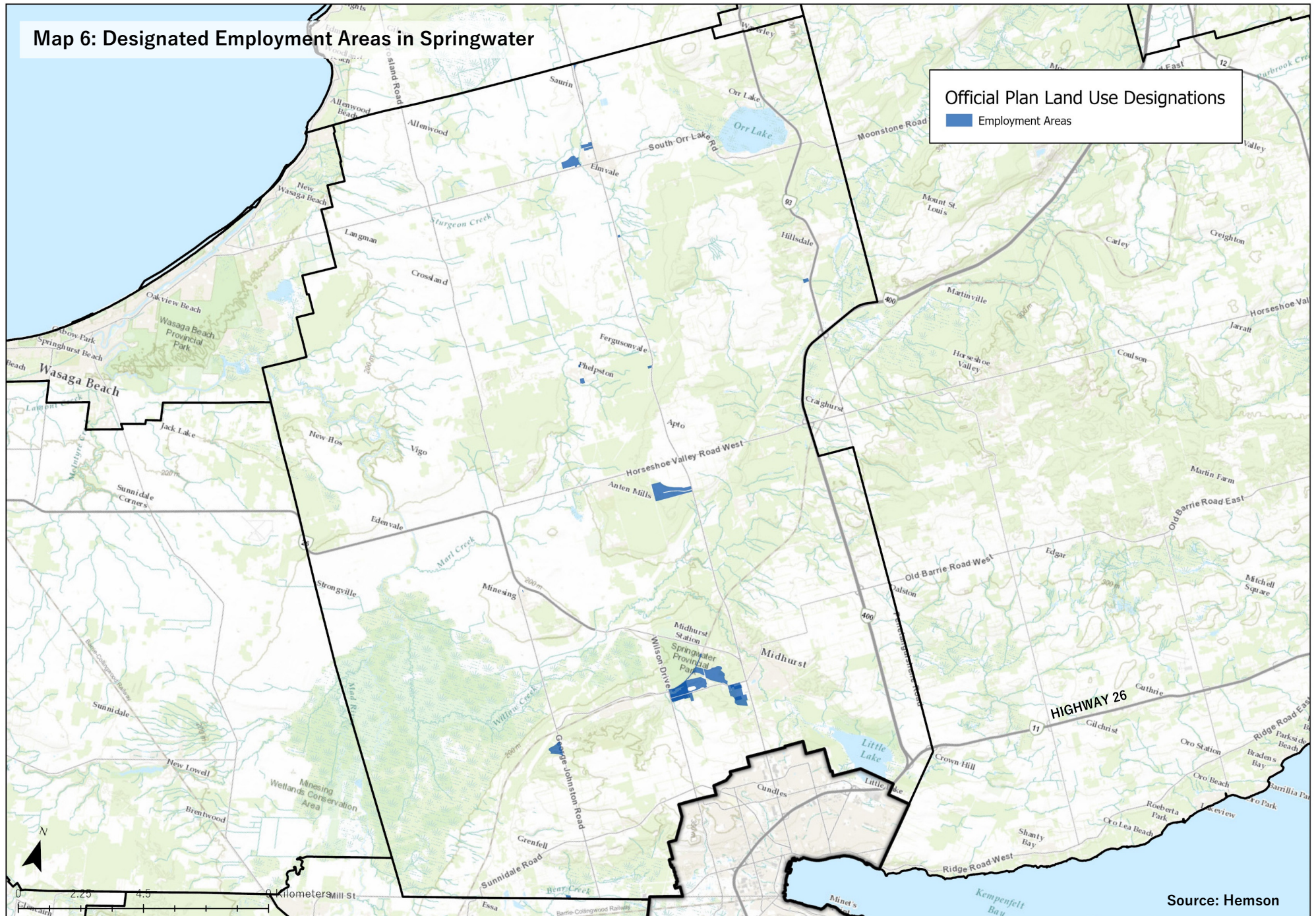
The Township has a limited supply of designated Employment Areas, with some located outside settlement areas. Table 6 illustrates that the Township has 55 hectares of vacant Employment Area land, which is projected to be fully developed at low urban densities by 2051, as outlined in the County MCR.

Table 6: Springwater Employment Area Supply-Demand Summary

Long-Term Land Supply (ha)	55.0
Total Land Supply (ha)	55.0
Assumed Employment Land Density (jobs/ha)	20
Employment Land Capacity (jobs)	1,100
Employment Land Employment Growth, 2021 - 2051 (jobs)	1,101
Sufficiency of Supply (ha)	(0.1)

Source: Simcoe County MCR

Map 6: Designated Employment Areas in Springwater



Map 6 shows the location of the Township's Employment Areas, including those within the Midhurst Secondary Plan area. Unlike Oro-Medonte, these areas are generally small and scattered throughout the Township, primarily serving local needs. Employment in these areas typically focusses on agriculture, aggregates, small scale manufacturing and construction and, in some areas, tourism and recreation. Outside the Midhurst Secondary Plan area and Elmvale, these Employment Areas lack existing or planned servicing for industrial or commercial use, which is expected to result in low employment growth over the next 25 years.

A key regional economic corridor for the Township and County of Simcoe, along Highway 26, links the City of Barrie with urban centres along the Lake Huron shoreline, including Collingwood and Wasaga Beach. This corridor passes through the Township but is not well supported by Employment Areas within Springwater. While there is an employment cluster along Highway 26, west of Midhurst, it primarily consists of municipal offices (County and Township) and other public facilities.

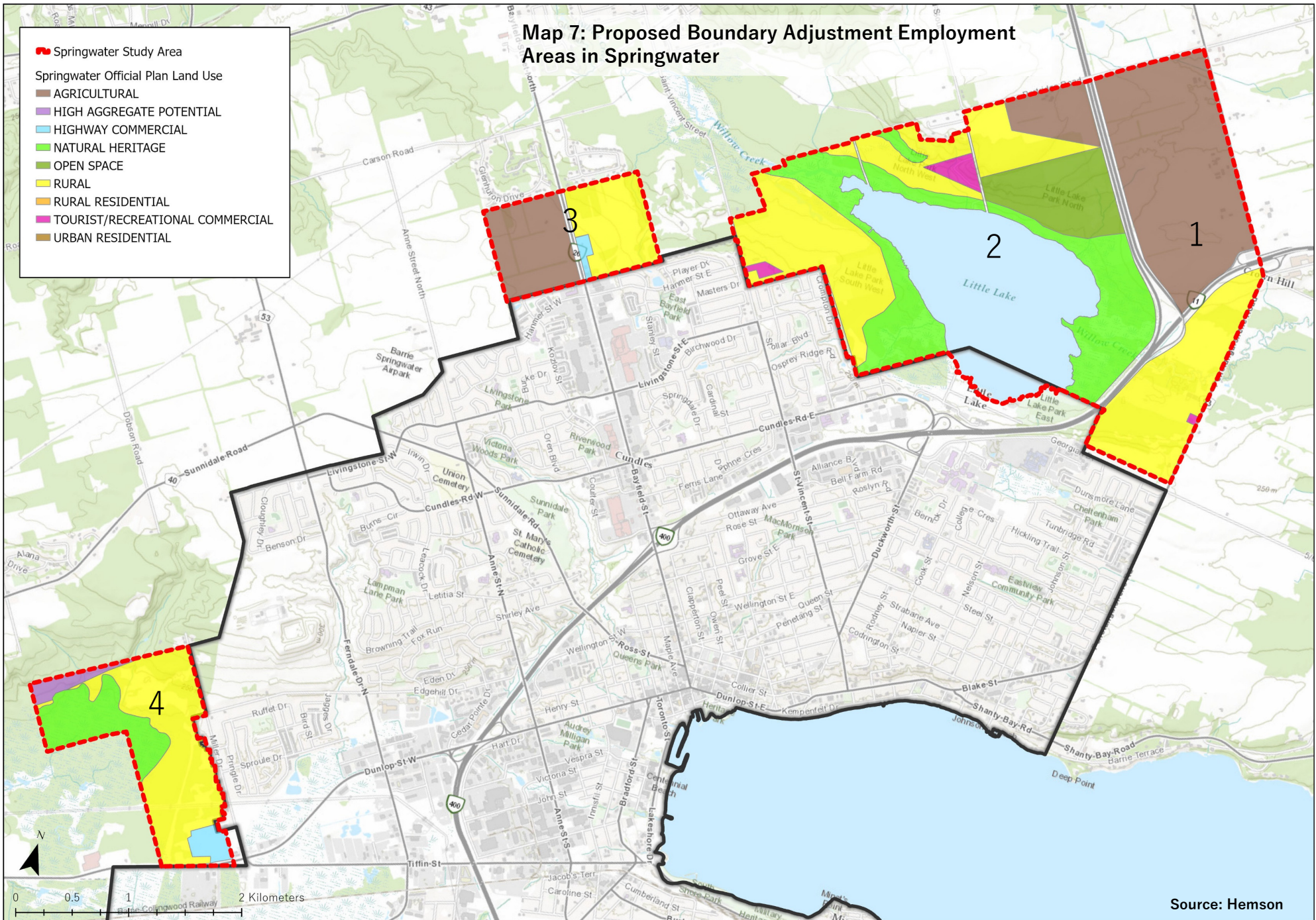
According to the County Official Plan, the Township's activity rate is projected to decline from 33% in 2021 to 28% in 2051, even with the full build out of the current Employment Area supply. Notably, the County Official Plan does not assume full build out of the Midhurst Secondary Plan area. Should housing growth Midhurst proceed at a faster pace than envisioned by the County Official Plan, the Township's activity rate could decrease significantly over the next 25 years.

To address this potential shortfall, the Township would need to expedite the designation of additional Employment Areas. This step is critical to ensuring that emerging communities in Springwater, particularly those in the Midhurst Secondary Plan area, develop as "complete communities" with a balanced mix of residential and employment opportunities.

ii. Review of Suitability of Boundary Adjustment Lands in Springwater for Employment Area Uses

A recent proposal suggests adjusting Barrie's urban boundary to include lands in Springwater, located north and west of the City, to address Employment Area needs. The proposed adjustment area comprises approximately 1,324 gross hectares, divided into four sub-areas for analysis (see Map 7). Below is a high-level assessment of the suitability of these lands for Employment Area uses.

Map 7: Proposed Boundary Adjustment Employment Areas in Springwater



Source: Hemson

- **Land use designations:** A significant portion of Area 2 (approximately 40%) is occupied by natural heritage and open spaces around Little Lake, limiting the potential for large, contiguous employment parcels. Area 4 contains a notable natural heritage area, posing similar development constraints. The remaining Areas 1 and 3 are mainly designated for agricultural and rural land uses under the Springwater Official Plan.
- **Existing uses:** In addition to agricultural activity, mainly arable farming, other existing land uses include scattered rural residential uses, golf courses (Areas 1 and 2), Little Lake Park North (Area 2), and various rural commercial uses (Area 4).
- **Adjacent uses:** Area 1 is bordered by urban residential uses in Barrie (south), rural lands in Oro-Medonte (east), Highway 400 (west), and rural lands (north). Non-environmental lands in Area 2 are adjacent to rural lands (north) and urban residential areas uses in Barrie (west). Area 3 is adjacent to rural lands (north and west), urban residential lands in Barrie (south), and commercial uses along Bayfield Road. Finally, Area 4 adjoins rural residential lands (north), environmental lands (west and south), and urban residential lands in Barrie, including a waste and recycling depot (east).

There are several challenges associated with developing the proposed boundary adjustment lands in Springwater for Employment Area uses:

- **Distance from existing employment hubs:** Areas 1, 2 and 3 are located far from Barrie's main Employment Area hubs in south and central Barrie. Part of Area 4 is closer in proximity to existing Employment Areas.
- **Compatibility:** Area 3 is broadly situated between densely urbanized settlement areas—existing residential neighbourhoods in Barrie and developing residential areas in the Midhurst Secondary Plan. At full build out, an Employment Area here would likely conflict with surrounding residential uses.
- **Topographical constraints:** Area 1, while strategically located at the intersection of Highways 400 and 11, features rolling topography which could complicate site development and servicing. The other areas generally exhibit flat terrain, favourable for development.
- **Servicing and infrastructure:** All areas currently lack municipal water and wastewater infrastructure and an urban road network, both within the areas and connecting the areas to the highway corridors, to support truck traffic. Servicing to Area 1 may be particularly challenging given the need to cross highways.

As such, Areas 1 to 3 face significant constraints, including natural heritage limitations, compatibility issues with surrounding uses, and infrastructure challenges. Area 4 is closer to existing employment areas in Barrie and has better access to Highway 400, making it more viable for Employment Area expansion. The site selection factors for Employment Area users in each area are summarized in Table 7.

Table 7: Comparison of Site Selection Factors for Employment Area Users – Proposed Expansion Lands in Springwater

Factor	Area 1	Area 2	Area 3	Area 4
Access to labour – within Barrie and across Simcoe County	✓	✓	✓	✓
Proximity to other established Employment Areas – supplier links				✓
Does the location complement planned employment uses nearby?				✓
Proximity to a Strategic Economic Employment Area				
Does the location serve businesses in a rural area, benefitting from separation/distance from urban lands	✓	✓	✓	✓
Direct/proximate access to Highway 400	✓			
Visibility on arterial highways	✓			
Accessibility to transportation infrastructure such as rail lines or an airport	✓			
Area large enough to provide opportunities for significant contiguous blocks of land	✓			✓
Area can accommodate land-extensive users	✓			
Existing uses that can be leveraged for spin-off impacts				
Lack of physical features that could preclude/inhibit development			✓	✓
Can land use conflicts be managed/avoided				✓
Location conducive to attracting target employment sectors				✓

Source: Criteria developed from Cushman and Wakefield, Decision-Making Factors – from Economic Strategy – Real Estate Market and Site Selection Perspectives, prepared for the County of Simcoe, March 2022

To address the gap in Employment Areas relative to the anticipated housing growth, and to support the development of “complete communities” in the Township’s settlement areas, Township Council has authorized several initiatives, including a Master Transportation Plan, Water and Wastewater Master Plan, Parks Master Plan, and most notably, a Land Use Growth Management Plan. Each of these Master Plan studies is currently underway. The intent, among others, is to establish a strong employment lands sector recognizing the value of Highway 26, Highway 400, and County Road 27 as key assets running through the Township.

6. COMMUNITY AREA LAND NEEDS ASSESSMENT

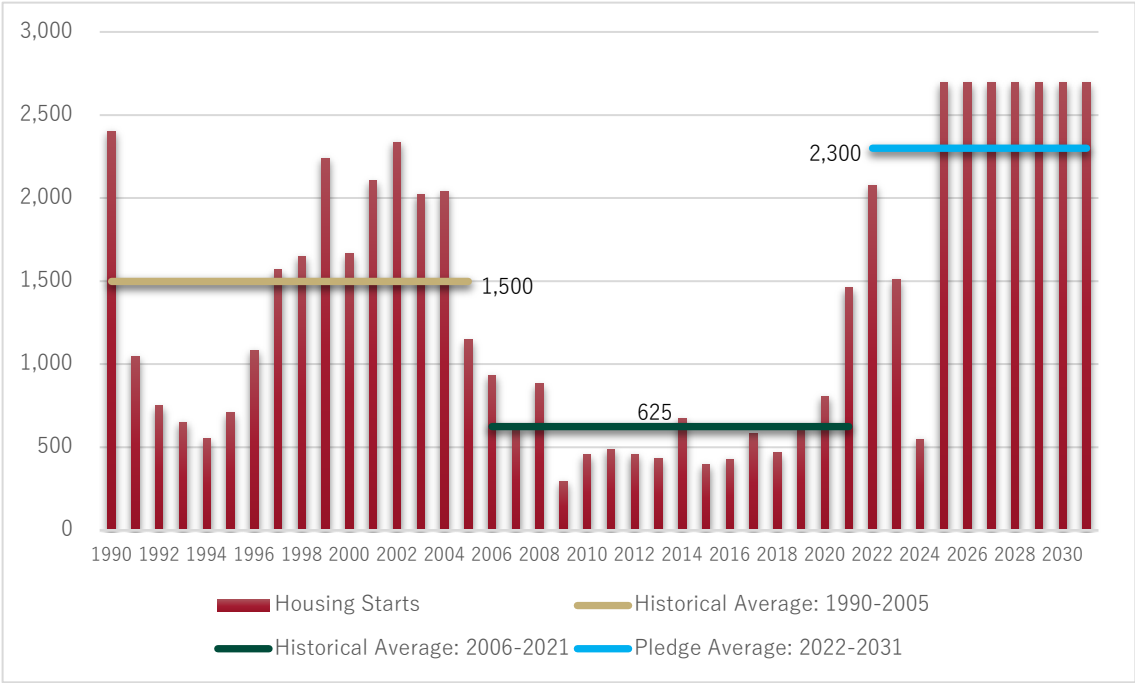
This section summarizes key findings related to Community Area land needs to 2051 for the City of Barrie, the Township of Oro-Medonte and the Township of Springwater. Community Area land needs includes population-related employment uses, such as local retail, services, and institutional uses.

In a typical greenfield residential development, approximately 50% of the developable land area (i.e. excluding undevelopable natural heritage areas) is occupied by private residential lots. The remaining land accommodates infrastructure and community uses, such as local roadways, parks, schools, stormwater management facilities, places of worship, and local retail and services.

i. Barrie’s Rate of Housing Growth Will Need to Increase to Meet the City’s Housing Pledge and the Long-Term Forecast

Following the completion of Barrie’s MCR, the Province established ambitious housing targets for large and fast-growing municipalities, contributing to support the Provincial goal of 1.5 million new homes by 2031. In early 2023, the City pledged to deliver 23,000 housing units by 2031, which will require a substantial increase in housing construction over the next seven years. Figure 5 illustrates historical housing starts alongside the level of housing growth required to meet Barrie’s housing pledge.

Figure 5: Barrie Housing Starts – Historical and Projected

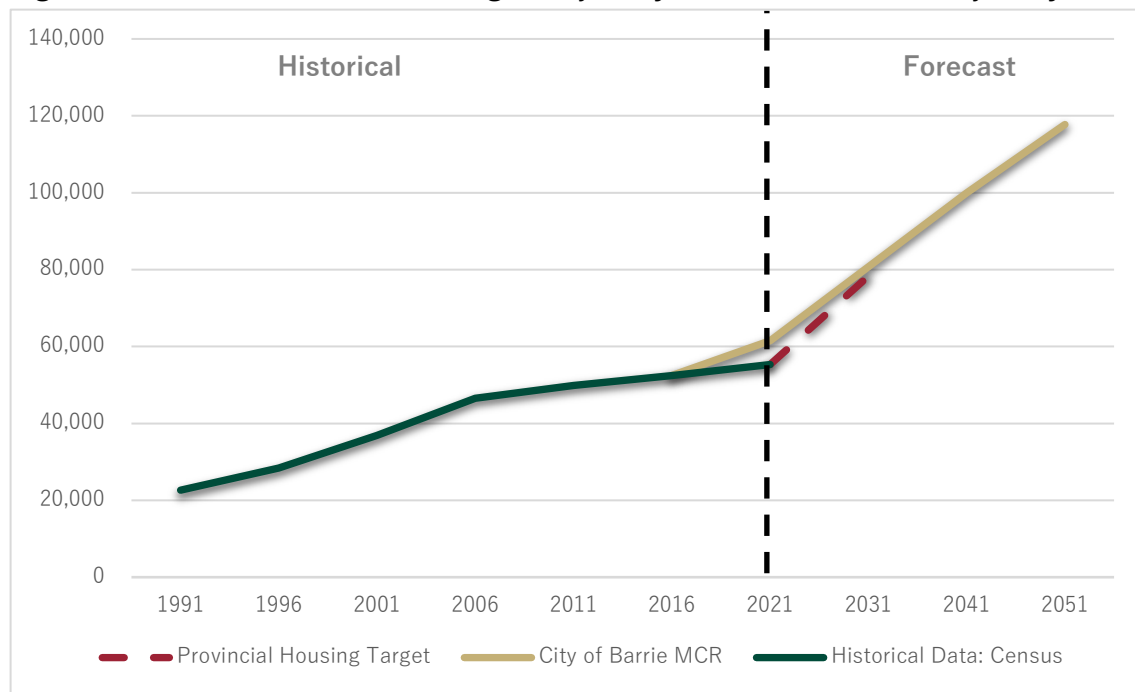


Source: CMHC, Housing Starts; Hemson Consulting

Achieving this target requires an average of 2,500 housing starts per year for seven consecutive years, far exceeding any single year’s peak housing starts during Barrie’s growth surge in the late 1990s and early 2000s. It is also more than four times the recent historical annual average of 600 units between 2006 and 2021.

Beyond the 2031 housing target, Barrie’s housing growth rate must also increase to align with the long-term forecast to 2051 set out in its Official Plan. Figure 6 compares historical housing growth in Barrie since 1991 with the growth trajectory required to meet the 2051 forecast and the accelerated growth rate needed for the 2031 housing target.

Figure 6: Historical Growth, 2031 Target Trajectory, and 2051 Forecast Trajectory



Source: Hemson Consulting

The data highlights the significant challenges Barrie faces in scaling its housing development, in all areas of the City, to meet both short- and long-term objectives. Accelerated housing growth is required not only to fulfill housing pledge commitments but also to ensure community development that aligns with Barrie's Official Plan vision.

ii. Barrie Community Area Land Needs

Barrie's MCR, summarized in a series of reports from 2019 to 2021, provided a residential forecast to accommodate the projected 2051 population of 298,000, as set out in the former Provincial Growth Plan.

a) Forecast Housing Units in Barrie to 2051

The MCR projected that Barrie would require a total of approximately 117,700 housing units by 2051. Using a forecast 2021 housing base of 61,500 units, this implied growth of 56,200 units over 30 years. However, the 2021 Census reported Barrie's actual occupied housing unit base at 55,300 units, lower than forecasted.

Consequently, the adjusted housing growth required from 2021 to 2051 is 62,400 units (see Table 8). Based on the City's Official Plan intensification target, half of this growth (31,200 units) is to occur within the Built-up Area (BUA), with the remaining half in the City's

Designated Greenfield Area (DGA). This requires annual growth of approximately 1,050 units per year in both the BUA and DGA to 2051.

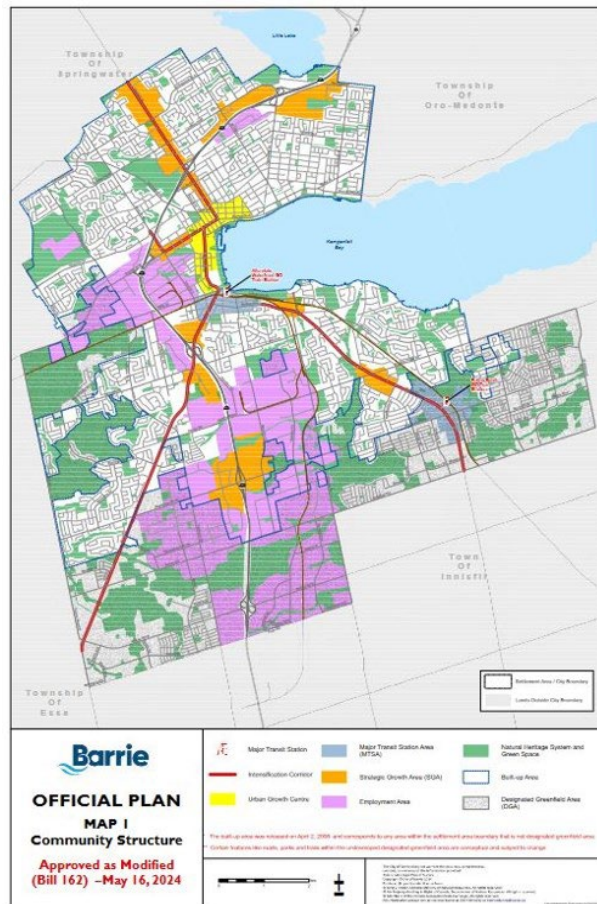
Table 8: Barrie Updated Housing Needs to 2051

	MCR Forecast	Adjusted Forecast	Adjusted Annual Average
2021 Housing Base	61,500	55,300	
2051 Housing Forecast	117,700		
Growth (2021-2051)	56,200	62,400	2,100
BUA (50%)		31,200	1,050
DGA (50%)		31,200	1,050

b) Barrie's Intensification Target: Ambitious But Achievable

The City has established a land use planning framework to support residential growth through intensification and is investing in the necessary municipal infrastructure. The Official Plan focuses growth within Strategic Growth Areas, including an Urban Growth Centre, intensification nodes and corridors, and a Major Transit Station Area within the BUA (see Map 8).

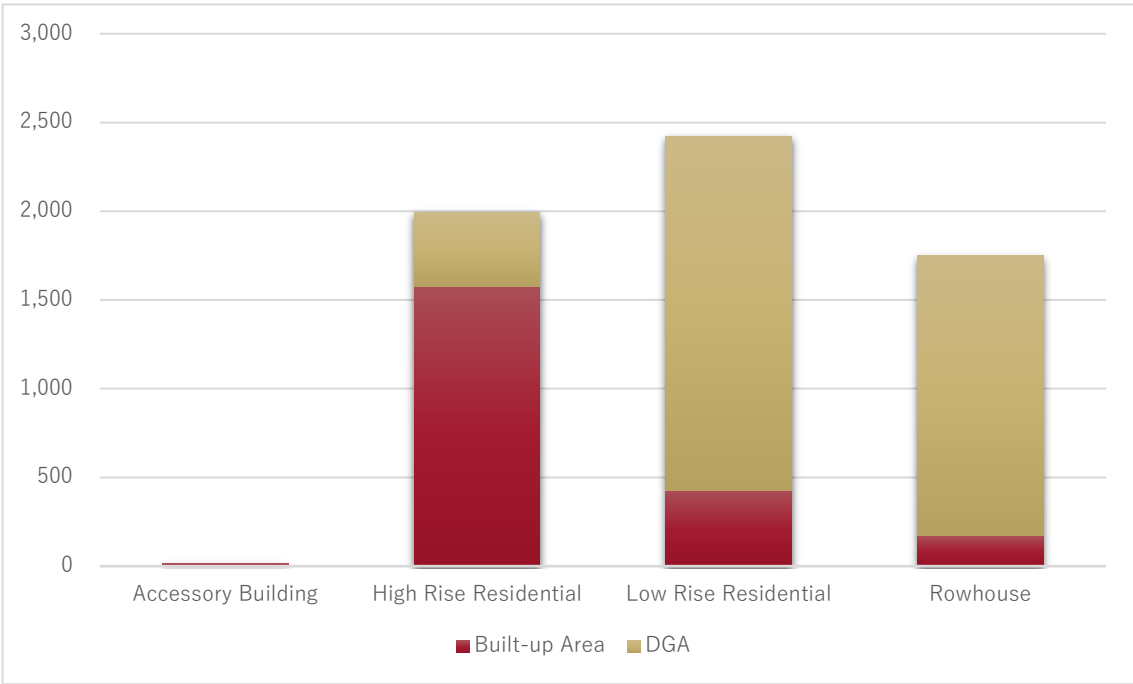
The City's MCR background studies identified a theoretical supply potential of 38,400 units in the BUA. Recent Provincial policy changes, such as those enabling Additional Residential Units (ARUs), are expected to further support higher levels of growth through modest infill and second unit development.



Despite this, Barrie's intensification rate has averaged approximately 35% between 2019 and August 2024, below the 50% target in the Official Plan. Most intensification units have been higher-rise apartments (see Figure 7). Development activity indicates that high density residential demand is growing, with 1,642 apartment units under construction

across the City and another 10,267 units under application in the BUA. Going forward, the number and share of intensification housing units will need to increase to meet the 50% intensification target while also keeping pace with higher overall housing growth forecasts.

Figure 7: Barrie Building Permits for New Units in BUA and DGA, 2019-Aug 2024



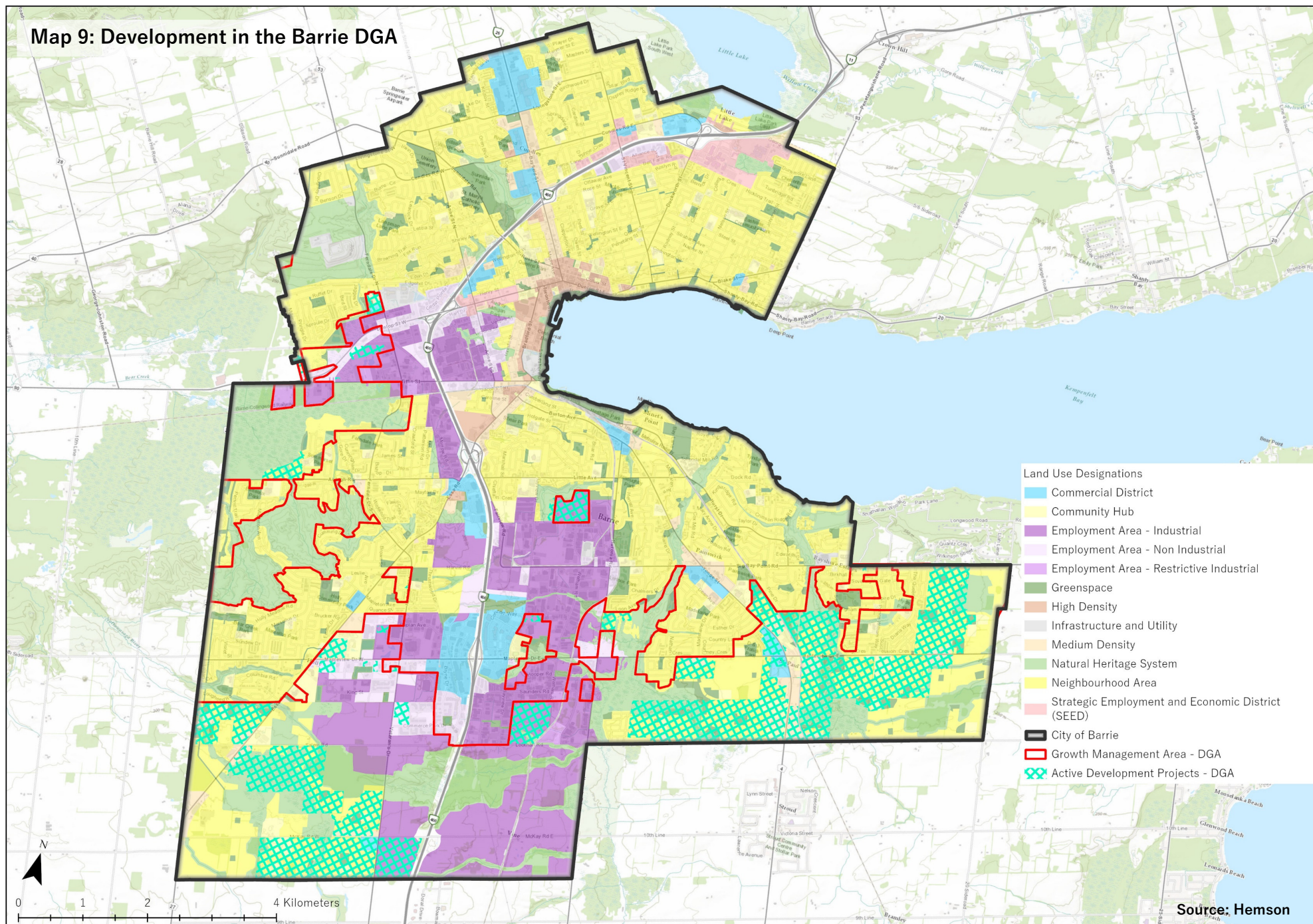
Source: Statistics Canada, Building Permits; Hemson Consulting

c) Higher Density Development Required in Barrie’s DGA

Barrie’s DGA is located mainly in the southern part of the City and includes a Major Transit Station Area. A significant portion of the DGA is under development application, providing evidence of how the DGA might build out over time (see Map 9). As noted above, the DGA is forecast to accommodate 31,200 units between 2021 to 2031. Development activity in the DGA, as of 2024, includes:

- 4,000 units that have been completed to date, of which 11% are apartments;
- 13,000 units that are under application, of which 45% are apartments; and consequently
- 14,200 units that remain to be accommodated on remaining vacant DGA lands.

Map 9: Development in the Barrie DGA

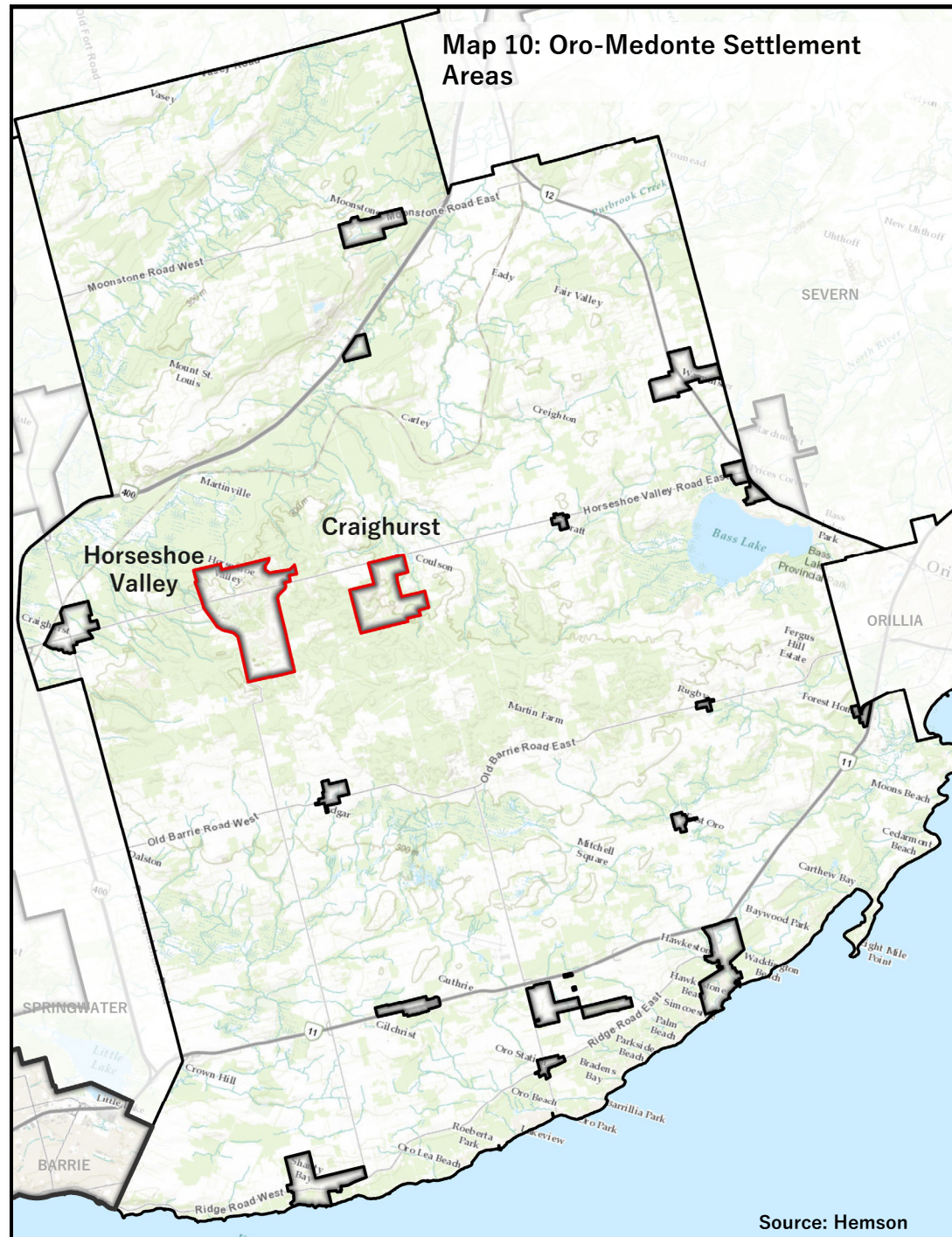


To meet this remaining 14,200 target, there are 351 hectares of vacant developable Community Area lands in the DGA with no current applications. Accommodating 14,200 units on these lands would require an average density of 40 units per hectare, significantly higher than typical greenfield densities. Preliminary analysis indicates that more than 80% of these units would need to be apartments and row houses, leading to one of the densest greenfield areas of the GTA. This is in addition to the already substantial number of apartment units required in the BUA to meet the City's intensification target. Consequently, apartments would increasingly be the predominant form of available new housing across all areas of Barrie, creating a housing supply that would be insufficient to meet demand for a diverse range and mix of unit types, particularly in the DGA.

iii. Oro-Medonte Community Area Land Need

The County MCR forecasts that Oro-Medonte will require an additional 2,340 housing units between 2021 to 2051. No additional Community Area land needs are anticipated within this timeframe. Currently, 97% of the Township's housing stock consists of single and semi-detached units. The County forecasts that future housing growth will continue to focus on low density forms, with 92% of new units expected to be single and semi-detached homes, while 8% will be higher density units. While this represents a slight shift toward more compact development, the County forecasts do not envision a transformation from the Township's current rural settlement structure to a highly urbanized form.

Under Oro-Medonte's Official Plan, the majority of growth is planned to occur within the settlement areas of Craighurst and Horseshoe Valley, where municipal water and wastewater services are available (see Map 10). Limited growth is planned in rural settlements and through development of rural lots of record. The Official Plan does not contemplate the creation of new settlement areas.

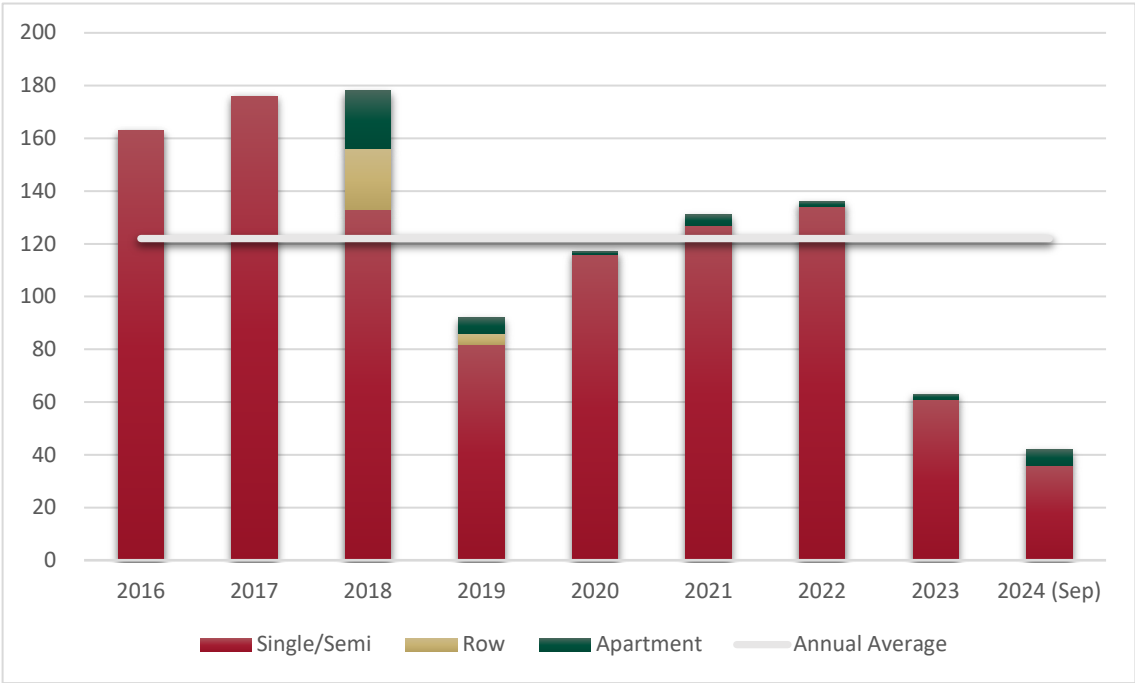


The County MCR shows that the Township’s available land supply is primarily allocated to low-density development (single-detached and semi-detached units). Most of the vacant lands already have active development applications, leaving limited potential for future growth on lands without current applications.

The County MCR indicates that Oro-Medonte will experience higher levels of population growth leading up to 2031, followed by a moderate slowdown through 2051. This trend aligns with other rural municipalities in the northern part of the County. Figure 8 compares historical housing growth in Oro-Medonte, as indicated by building permit data, with the County MCR forecast:

- Between 2016 and 2018, annual growth exceeded 160 permits per year, reflecting a temporary surge.
- Recent growth aligns more closely with the County’s forecasted average of 80 units per year from 2021 to 2051.

Figure 8: Oro-Medonte Building Permits for New Units



Source: Statistics Canada, Building Permits

In conclusion, while Oro-Medonte is currently able to accommodate forecasted growth:

- most vacant lands already have development applications, leaving minimal room for future development beyond these applications;

- the majority of the Township’s land supply is allocated to low-density housing types, which cannot accommodate a large-scale shift in housing options to urban medium density or “missing middle” housing;
- to address population growth beyond 2051, the Township may need to identify additional community areas or re-evaluate existing land use policies.

iv. Springwater Community Area Land Needs

The Township of Springwater has a significant surplus of designated Community Area lands, comprising both lands currently under development applications and vacant lands without applications. Table 9 demonstrates that Springwater can accommodate more than 11,000 units on its designated Community Area lands.

Table 9: Springwater Community Area DGA Land Supply (2021)

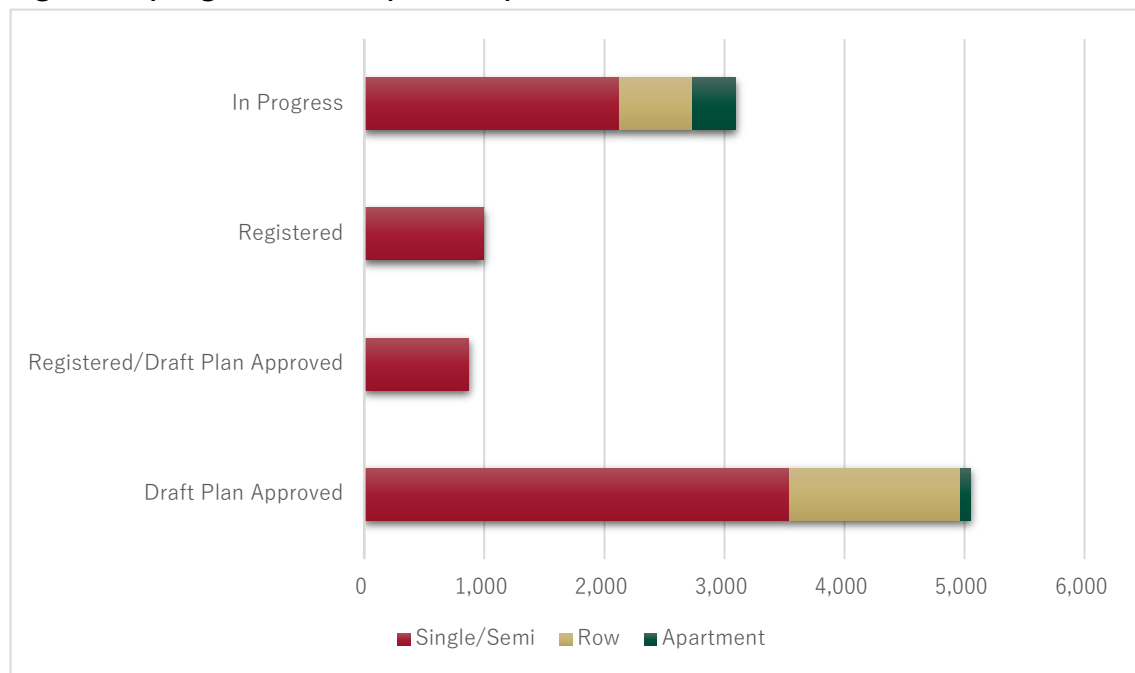
Supply Potential	Single/Semi	Row	Apartment	Total
In planning process	4,740	1,270	80	6,090
Vacant land (no applications)	3,910	1,050	70	5,020
Total	8,640	2,320	150	11,120

Source: Simcoe County MCR

Since the completion of the County MCR, many parcels classified as “vacant” are now subject to development applications. Recent data from the Township indicates that more than 10,000 units are currently in the development pipeline, which exceeds the County’s projected 5,130 unit growth for Springwater from 2021-2051.

The Township’s current development applications reflect slightly higher densities than anticipated in the County MCR. Applications comprise 75% single and semi-detached units, 20% row houses, and 5% apartments, compared to the MCR’s forecast of 82% single/semi-detached, 16% rows, and 2% apartments. This shift toward higher-density development is indicative of evolving housing market trends and policy objectives.

Figure 9: Springwater Development Pipeline



Source: Township of Springwater planning data

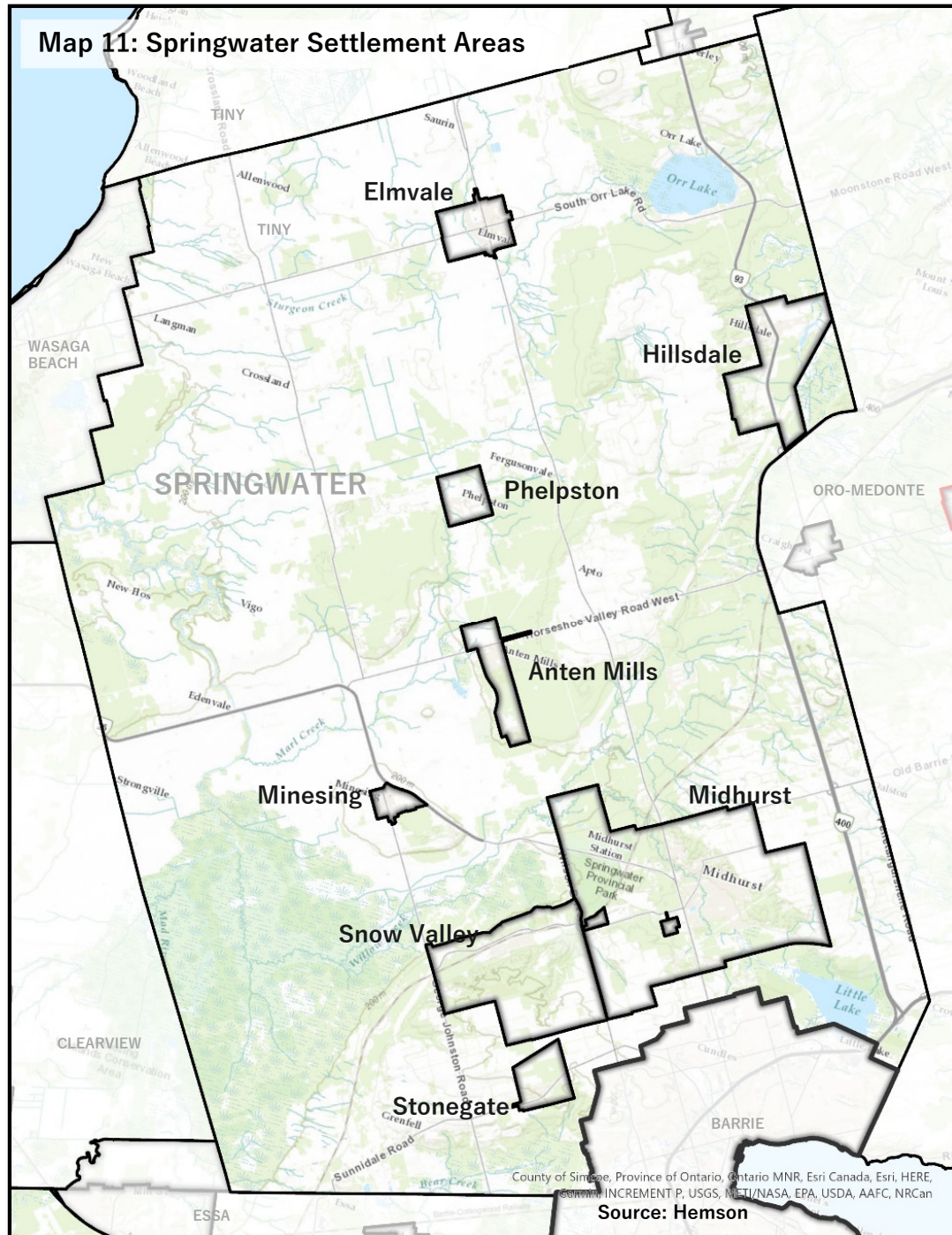
In addition to the DGA, Springwater's rural settlements and rural areas have significant residential growth potential, with a theoretical supply for 5,430 units.

Springwater has nine settlement areas, with Midhurst, Elmvale, and Hillsdale expected to accommodate the majority of future residential growth (see Map 11). The Midhurst Secondary Plan Area is planned as a significant "complete community" that will integrate residential, commercial, institutional, and employment uses, with a projected population of approximately 29,000 at full build out. Development is concentrated around three proposed neighborhoods around the existing Midhurst settlement area.

There is considerable uncertainty about the rate of housing growth expected in Midhurst, in part because of the transformational nature of the Midhurst Secondary Plan. Large scale water and wastewater treatment capacity is expected to become available in the area in the next two years and the Township is actively constructing a range of municipal facilities for new residents of the area.

Figure 10 shows historical housing starts in Springwater since 1990 compared to the County Official Plan's forecast growth. Recent development in the settlement areas of Centre Vespra and Snow Valley, to the immediate north of Barrie, is responsible for the higher growth in Springwater in recent years. This level of recent growth is generally aligned with the County Official Plan forecast average of 161 units per year (except for 2022, which saw an unusual peak of nearly 450 housing starts).

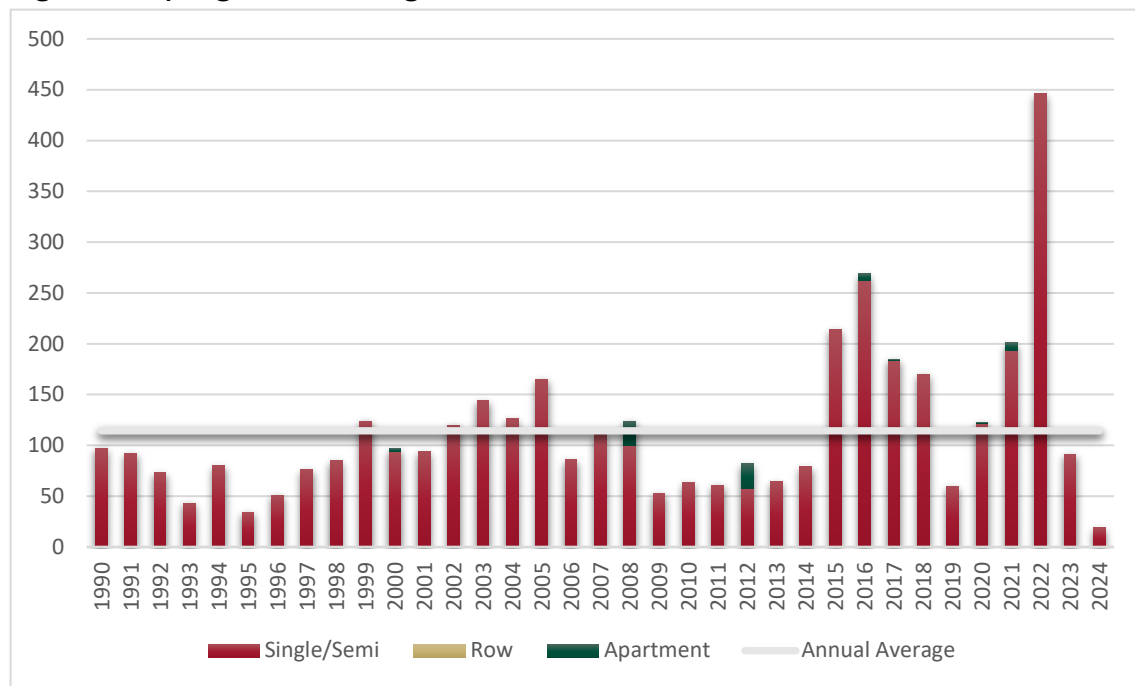
Map 11: Springwater Settlement Areas



County of Simcoe, Province of Ontario, Ontario MNR, Esri Canada, Esri, HERE, Garmin, INCREMENT P, USGS, NIT/NASA, EPA, USDA, AAFC, NRCAN

Source: Hemson

Figure 10: Springwater Housing Starts⁸



Source: CMHC, Housing Starts

Springwater is currently undertaking a Growth Management Strategy, which may propose a higher growth forecast to 2051 than the current County Official Plan forecast. A higher forecast will need to carefully consider Springwater's role in accommodating *regional* housing demand. However, even under an elevated forecast, Springwater's existing residential land supply is likely sufficient to meet anticipated demand to 2051. This surplus ensures that the Township can respond to future growth demands while maintaining flexibility in planning and development. In summary, Springwater's Community Area supply is more than sufficient to accommodate its own housing needs as set out in the County Official Plan, and also has the potential to accommodate a significant share of the regional housing demand.

v. Community Area Land Need Conclusions

The Townships of Oro-Medonte and Springwater have sufficient Community Area land supply to meet their respective growth forecasts to 2051. Conversely, the City of Barrie faces challenges in accommodating its forecast growth within its existing DGA lands.

To meet its forecasted growth, Barrie would need to achieve a very high residential density of 40 units per developable hectare on its remaining vacant DGA lands without current planning applications. This density equates to approximately 100 residents and jobs per

⁸ The data trends shown in this graph is consistent with trends in residential building permit data.

hectare, significantly exceeding Barrie's DGA target density of 79 residents and jobs per hectare and the target densities of other municipalities in Simcoe County and the GTA (see Table 10).

Table 10: DGA Density Targets in Simcoe and the GTA

Municipality	Residents and Jobs Per Ha	Municipality	Residents and Jobs Per Ha
York Region		Halton Region	62
Aurora	55	Burlington	76
East Gwillimbury	60	Oakville	70
Markham	70	Milton	59
Richmond Hill	70	Halton Hills	53
Vaughan	70	Simcoe County	
Whitchurch-Stouffville	55	Springwater	45
New Community Areas	65	Essa	45
Peel Region	70	Innisfil	55
Brampton	71	New Tecumseth	55
Caledon	67.5	Bradford West Gwillimbury	55
Durham Region	53	Orillia	50

Source: Municipal Official Plans

Given the unlikelihood of achieving the required density to accommodate forecasted growth, two scenarios have been developed to estimate additional Community Area land needs (see Table 11).

Table 11: Barrie Designated Greenfield Area Estimated Land Need

	Scenario 1 Barrie Planned Density	Scenario 2 Typical Suburban Density
Forecast DGA housing units 2021-2051	31,200 units	31,200 units
Units in building permits & applications	17,000 units	13,600 units
Remaining units to be accommodated	14,200 units	17,600 units
Vacant DGA lands (no current applications)	351 ha	351 ha
Assumed density	23 units per ha	18 units per ha
Potential unit yield	8,100	6,300
Unaccommodated housing units	6,100	11,300
Assumed density	23 units per ha	18 units per ha
Estimated land need	265 ha	630 ha

- **Scenario 1: Barrie Planned Density:** assumes 23 units per developable hectare, based on observed densities in current DGA planning applications. Scenario 1 results in an additional Community Area land need of approximately 265 hectares.
- **Scenario 2: Typical Suburban Density:** assumes 18 units per developable hectare, reflecting densities being planned for many suburban GTA communities. Scenario 2 results in an additional Community Area land need of approximately 630 hectares.

7. CONCLUSIONS AND OPTIONS FOR ADDRESSING LAND NEEDS

The case for additional land for Barrie for only Employment Area uses is relatively weak, as there is sufficient vacant supply to accommodate forecast employment growth to 2051. It is noted, however, that this land is planned for much higher employment densities than are occurring in Barrie today. Moreover, Barrie's shortage of shovel-ready lands cannot be resolved through land annexation, which is typically a multi-year process.

However, Barrie will likely face shortfalls in its Community Area land supply to meet residential demand under current DGA densities. Addressing this gap could require either building homes at unrealistic densities in the DGA or expanding municipal boundaries to access additional land.

When evaluating the expansion of municipal boundaries as a potential solution to address land needs, it is important to consider incorporating both Employment Area and Community Area lands over. This integrated approach ensures a long-term perspective for developing complete communities that balance residential, commercial, and employment opportunities. It also recognises the longer-term planning horizons to consider in such processes (i.e. beyond 2051).

Table 12 below outlines the potential Employment Area land needs corresponding to the two Community Area land need scenarios previously identified. The Employment Area estimates are based on the approximate ratio of Community Area to Employment Area lands observed in the Salem and Hewitt's Secondary Plans.

Table 12: Potential Community and Employment Land Need

	Community Land Need	Employment Land Need	Total
Scenario 1 – Barrie Planned Density	265 ha	125 ha	390 ha
Scenario 2 – Typical Suburban Density	630 ha	300 ha	930 ha

i. Options for Addressing Barrie's Land Needs

Two broad approaches are identified for addressing Barrie's land needs:

- **Option 1 – Maintain Municipal Boundaries:** Under this approach, growth not accommodated within Barrie would be absorbed by surrounding municipalities, such as Oro-Medonte and Springwater. With no change to municipal boundaries, a denser form of residential growth would continue in Barrie and growth would slow, possibly as early as the mid-2030s, with employment growth slowing in the mid-2040s. This approach will likely require servicing agreements between Barrie and neighbouring municipalities, potentially leading to the creation of a regional governance model to coordinate infrastructure delivery.
- **Option 2 – Adjust Municipal Boundaries:** This approach involves annexation of lands to the City of Barrie to accommodate Community Area and future Employment Area land needs. This would require a comprehensive analysis of potential annexation configurations, servicing requirements, fiscal impacts, and other land use considerations.

Additional Employment Areas specifically for the Township of Springwater may also need to be considered under both options.

If there is agreement to move forward with Stage 3 of the Joint Land Needs Study, criteria for evaluating both options will be established, considering:

- Infrastructure feasibility: water, wastewater, electrical, and gas services
- Short and long-term financial impacts: effects on municipal budgets, tax revenue, etc.
- Environmental considerations: impact on natural features and agricultural lands
- Land-use planning: alignment with long-term growth and economic development objectives.

A comprehensive assessment of this kind will guide collective decisions on addressing land needs for all participating municipalities while fostering regional collaboration.

APPENDIX A

CITY OF BARRIE

REVIEW OF VACANT EMPLOYMENT LAND SUPPLY

REVIEW OF VACANT LAND SUPPLY (AUGUST 2024)

The following site identifiers are shown in the map overleaf.

Site 1166 – Parcel is located in a rural area; however, there are homes under construction on the opposite side of Veteran Drive.

Site 1168 – A portion of the site is visible from the highway, but this area is surrounded by dense tree cover, which is not part of the site and may obscure visibility.

Site 1184 – Most of the site is not visible; however, a small portion extends toward the highway. Depending on how the site is arranged, it could potentially be visible.

Site 1177 – The site includes rows of trees, one of which contains a small creek. The creek is located at the edge of the site and is unlikely to pose significant issues.

Site 1165 – Site contains large piles of gravel and rocks.

Site 1201 – Large power lines run through a portion of the site.

Site 1182 – A large factory building is visible from McKay Road.

Site 1182 – A creek flows into the site and is surrounded by trees. There is also significant tree coverage throughout the site.

Site 1186 – There is a creek that ends and falls slightly into the site and there are trees present throughout.

Site 1181 – A creek runs through the southern portion of the site. The terrain is uneven, with hills and patches of trees and shrubs scattered across the area. A couple of houses are also present on the site.

Site 1179 – Site features a creek running through it, with hilly and uneven terrain.

Site 1193 – A creek runs through the site, with significant forest and vegetation cover. Construction is evident in the rear portion, away from McKay Rd.

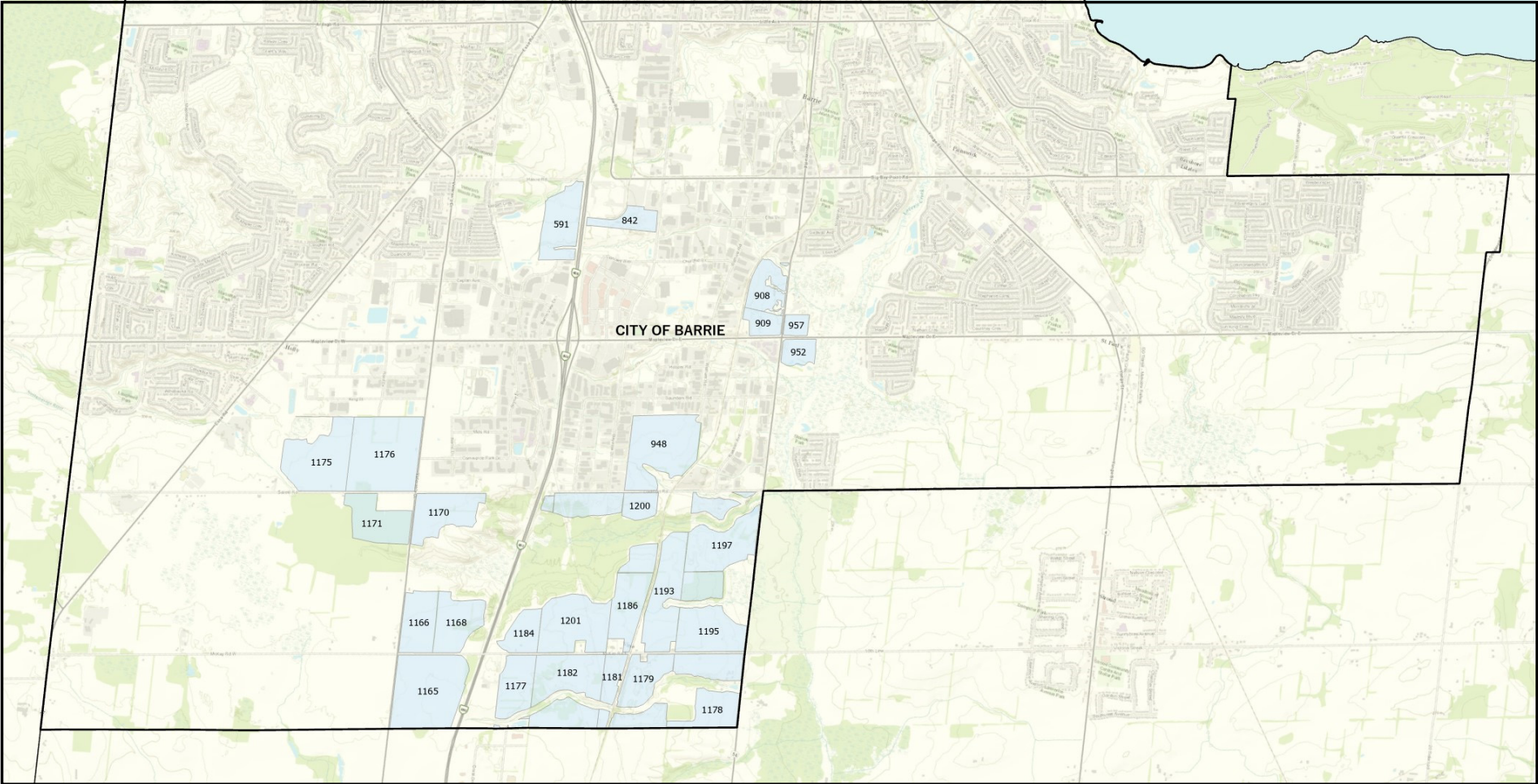
Site 909 – There is an abandoned house on the far west side, which may belong to Site 910.

Site 952 – Site is already occupied by Barrie's Family Golf Experience.

Site 948 – There is a creek present.

- Site 1200** – A large dip near the south end of the site may pose construction challenges.
- Site 1171** – Development may be difficult due to the dense forest cover.
- Site 1170** – Site features rolling topography throughout the area.
- Site 842** – Potential visibility from Hwy 400 exists on a narrow strip of land that connects to the highway.
- Site 842** – Site surrounded by numerous businesses, including a complex at 370 Bayview Drive (e.g. Life labs) and other nearby complexes (e.g. FedEx)
- Site 842** – On the west side, near the parking lot off Bayview Drive, there is a large hill of gravel and other sediments.
- Site 591** – A creek runs through the site.
- Site 1197** – The site includes a functional golf course.
- Site 1197** – There are also a couple of ponds on this site.

APPENDIX MAP 1: LOCATION OF EMPLOYMENT PARCELS



Factor	MAP ID NUMBER																											
	1165	1166	1168	1184	1177	1201	1182	1186	1181	1179	1193	1195	908	909	957	952	948	1200	1175	1176	1171	1170	842	591	1197	1178		
Access to labour – within Barrie and across Simcoe County																												
Proximity to other established Employment Areas – supplier links																												
Does the location serve businesses in a rural area, benefitting from separation/distance from urban lands		See Note																										
Direct/proximate access to Highway 400								See Note																				
Visibility on arterial highways			See Note	See Note																			See Note					
Accessibility to transportation infrastructure such as rail lines or an airport																												
Area large enough to provide opportunities for significant contiguous blocks of land																												
Area can accommodate land-extensive users																												
Existing uses that can be leveraged for spin-off impacts							See Note									See Note							See Note		See Note			
Lack of physical features that could preclude/inhibit development																												
Can land use conflicts be managed/avoided	See Note				See Note	See Note	See Note	See Note	See Note	See Note	See Note			See Note			See Note	See Note			See Note	See Note	See Note	See Note				
Location conducive to attracting target employment sectors																												

Parcel meets criteria
 Parcel could potentially meet criteria
 Parcel does not meet criteria