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PLANNING FOR TOMORROW – REFINED YORK REGION 2031 FORECAST AND LAND BUDGET

The Planning and Economic Development Committee recommends the following:

- 1. The deputation by Daryl Keleher, Resident, Toronto, be received;**
- 2. The presentation by Paul Bottomley, Manager, Growth Management Economy and Information Research, be received; and**
- 3. The recommendations contained in the following report dated July 29, 2008, from the Commissioner of Planning and Development Services, be adopted:**

1. RECOMMENDATIONS

It is recommended that:

1. The attached forecast and land budget be used as a basis for consultation with local municipalities, the public, and other stakeholders.
2. The Regional Clerk distribute this staff report to the Ministry of Public Infrastructure Renewal (PIR), the Ministry of Municipal Affairs and Housing, and the local municipalities for information purposes.

2. PURPOSE

The purpose of the report is to update the population and employment forecasts and current land supply as part of York Region's 'Planning for Tomorrow' initiative. This report provides a region-wide overview of the land budget implications and provides the basis for further discussion with local municipal staff, the province, public agencies, school boards, etc. More detailed information on the specific methodologies used in the calculation of the forecasts and land supply will be presented as an additional report to Committee in the coming months.

3. BACKGROUND

Upper and Single Tier Municipalities are required to conform to *Places to Grow*

The Province prepared a *Growth Plan* for the Greater Golden Horseshoe (GGH) under the *Places to Grow Act*, 2005. The Plan guides decisions on a wide range of issues including transportation planning, land-use planning, urban form, housing, natural heritage and resource protection.

The Plan contains population and employment forecasts to 2031 for the GGH and sets out policy directions that focuses growth on intensification in built up areas, urban growth centres, intensification corridors, major transit stations and Brownfield and Greyfield sites. These areas will provide the focus for transit and infrastructure investment to support growth. In order to achieve the *Growth Plan*'s intensification goals, 40% of all residential development annually is to occur within a municipality's built-up area by 2015 and each year thereafter.

The updated 2031 forecasts in the *Growth Plan* for York Region include a population of 1.5 million and employment of 780,000. York Region's current forecasts contained in the Regional Official Plan include a population of 1.28 million and 696,000 jobs by 2026. This is 224,000 more people and 105,000 more jobs than has been approved in the current York Region Official Plan.

Conforming to *Places to Grow* requires that a number of factors be considered including planning for the additional population and employment with the appropriate population and employment densities, planning for at least 40% of our growth through intensification and using land budget calculation techniques that are consistent with an agreed upon approach across the Greater Toronto Area and Hamilton (GTAH).

Staff developed five separate forecast scenarios

York Region staff developed five forecast scenarios examining varying levels of intensification including a 30%, 40%, 50% and no urban expansion scenario for Councils' consideration. In addition, the 40% intensification scenario was continued to 2051, illustrating the complete Greenfield build out of York Region.

These scenarios formed the basis for extensive public consultation including two rounds of public meetings, local municipal discussions, media interaction and a series of workshops and stakeholder focus groups.

Council directed staff to develop a preferred scenario based on a minimum 40% intensification target

Staff coordinated a comprehensive comparative analysis of the five available growth scenarios moving towards the development of a preferred scenario. The analysis for each scenario considered their relative impact on Human Services, Water and Wastewater, Transportation, Natural Heritage and the 25 year fiscal requirements in York Region. Based on this analysis, a recommended preferred scenario was identified and endorsed by Council in June 2008. The preferred scenario is based on a minimum 40% intensification for residential growth.

4. ANALYSIS AND OPTIONS

4.1 OVERVIEW

Population and Households

- York Region is anticipated to add an additional 577,000 people and 234,000 units from 2006 to 2031. In 2031, York Region's population will be at 1.5 million residents.
- The proportion of single family detached dwellings is anticipated to decline from 79% of the total housing stock to 62% in 2031.
- Of the required 87,000 intensification units, over 50,000 already have some level of approval.
- The number of persons per household across York Region is forecasted to decline from 3.22 in 2006 to 2.82 in 2031.
- All local municipalities are forecasted to play a role in accommodating the population growth and intensification.
- The population and employment forecasts have been refined as a result of consultation with local municipalities.

Employment

- York Region's employment is anticipated to grow from 462,000 in 2006 to approximately 799,000 by 2031, slightly higher than the Provincial forecast of 780,000 jobs.
- Attracting and accommodating this level of employment growth is a major challenge in York Region that requires the preservation of large physical areas of strategically located lands for employment uses.
- Employment growth is anticipated to occur in all of York Region's local municipalities.
- The largest percentage of the employment growth in York Region to 2031 will be focused in the southern municipalities of Vaughan, Markham and Richmond Hill.

- However, the distribution of growth is anticipated to shift significantly, with the municipalities of East Gwillimbury and Georgina playing a more prominent role in accommodating future employment growth.
- The current distribution of employment by category includes 44% employment lands, 42% population related and 14% major office. Over the next 25 years, the proportion of major office and employment land employment is anticipated to increase.
- Based on the preferred scenario, employment growth occurs most rapidly between 2006 and 2021 with slower growth recorded in subsequent years.

Land Budget Requirements

- The level of growth forecasted in the next 25 years in York Region will have significant land requirements for both population and employment.
- Each local municipality currently has designated lands for both residential and employment uses. However, additional approvals will be necessary in the Region in order to accommodate the forecast growth.
- The residential ground-related supply in the Region ranges from 9.0 years (based on historical demand) to 14.5 years (based on forecast demand).
- In the southern three municipalities of Markham, Richmond Hill and Vaughan, the supply of ground-related units ranges from 5.3 years to 11.5 years.
- In the northern six municipalities of Aurora, East Gwillimbury, Georgina, King, Newmarket and Whitchurch-Stouffville, the supply of ground-related units ranges from 18.9 years to 25.9 years.
- There is a 8.5 year supply of readily available vacant employment lands (excluding encumbered & industries on private services).
- Based on the preferred scenario, approximately 3,400 additional developable hectares of Whitebelt land is required to accommodate the additional population and employment in York Region by 2031.
- Given that planning approvals for new communities can take up to 10 years or more, it is important to proceed with urban boundary expansions given the risk that the ground-related supply could run out in just over five years in Southern York Region.
- Whitebelt lands with all development approvals could be required as early as 2013.
- Careful monitoring of assumptions in the preferred forecast is required. Small shifts in these assumptions could have significant implications for land supply shortages, a loss of strategic lands for employment uses, and fiscal impacts.

4.2 POPULATION AND HOUSEHOLD FORECAST

York Region anticipated to add 577,600 people and 234,100 households by 2031

As of mid-year 2006, York Region was home to an estimated 929,900 residents in 275,500 households. This resident population is expected to increase to 1,507,500 people

and 509,700 households by 2031. This rate of growth represents an increase of 577,600 people and 234,100 households over 25 years. This growth will be accommodated within designated Greenfield areas, the intensification of existing urban areas and through additional designations in the Whitebelt.

Population anticipated to increase in all local municipalities

All local municipalities will accommodate a share of the forecasted growth. However, the degree of growth within each local municipality will depend on one or several of the following factors:

- Current designated supply
- Intensification potential (Centres and Corridors)
- Whitebelt lands
- Planned densities

As such, municipalities with a larger designated supply of lands will play a greater role in satisfying short to medium term demand, whereas municipalities with extensive Whitebelt lands will play a larger role in satisfying long term needs (refer to *Attachment 1* for a map illustrating the growth distribution by local municipality).

The preferred scenario population figures have been distributed to the local municipalities, based on extensive consultation with local municipal staff. Previous versions of the forecast numbers for each local municipality were widely distributed in early 2007, and since that time the forecasts have been revised slightly. The revised figures are illustrated in *Table 1* below:

Table 1: York Region Total Population by Local Municipality (2006 to 2031)

Municipality	Total Population 2006	Total Population 2031	Population Growth 2006-31	2006-31 Share of Growth (%)	2006-31 Avg Annual Increase (%)
Aurora	49,600	70,400	20,800	2%	1.4%
East Gwillimbury	21,900	88,000	66,100	11%	5.7%
Georgina	44,500	70,700	26,200	5%	1.9%
King	20,300	35,100	14,800	3%	2.2%
Markham	272,500	423,500	151,000	26%	1.8%
Newmarket	77,400	97,300	19,900	3%	0.9%
Richmond Hill	169,500	242,800	73,300	13%	1.4%
Vaughan	248,800	418,800	170,000	29%	2.1%
Whitchurch-Stouffville	25,400	60,800	35,400	6%	3.6%
York Region	929,900	1,507,400	577,500	100%	2.0%

Within York Region, population growth will occur in three areas;

- *Intensification Areas*: Areas defined as “built-up” as of June 2006 by the Province,
- *Designated Greenfield Areas*: Areas that are currently designated “Urban Area” or “Towns and Villages” in the Regional Official Plan and are outside of the Intensification Areas, and
- *Whitebelt Areas*: Areas that are not currently designated “Urban Area” or “Towns and Villages” and are outside of the Greenbelt and Oak Ridges Moraine.

Figure 1 below illustrates how much growth will occur in each area:

Figure 1: York Region Household Growth 2006 to 2031

Designated Greenfield 49% (113,573 Units)	Intensification 37%* (87,436 Units)	Whitebelt** 14% (33,100 Units)
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*Note: The total 37% includes a ramp-up period from existing levels to 40% by 2015. 40% is maintained from 2015 to 2031.

**Note: Refer to page 15 for Whitebelt land requirements.

Majority of intensification requirement already accounted for

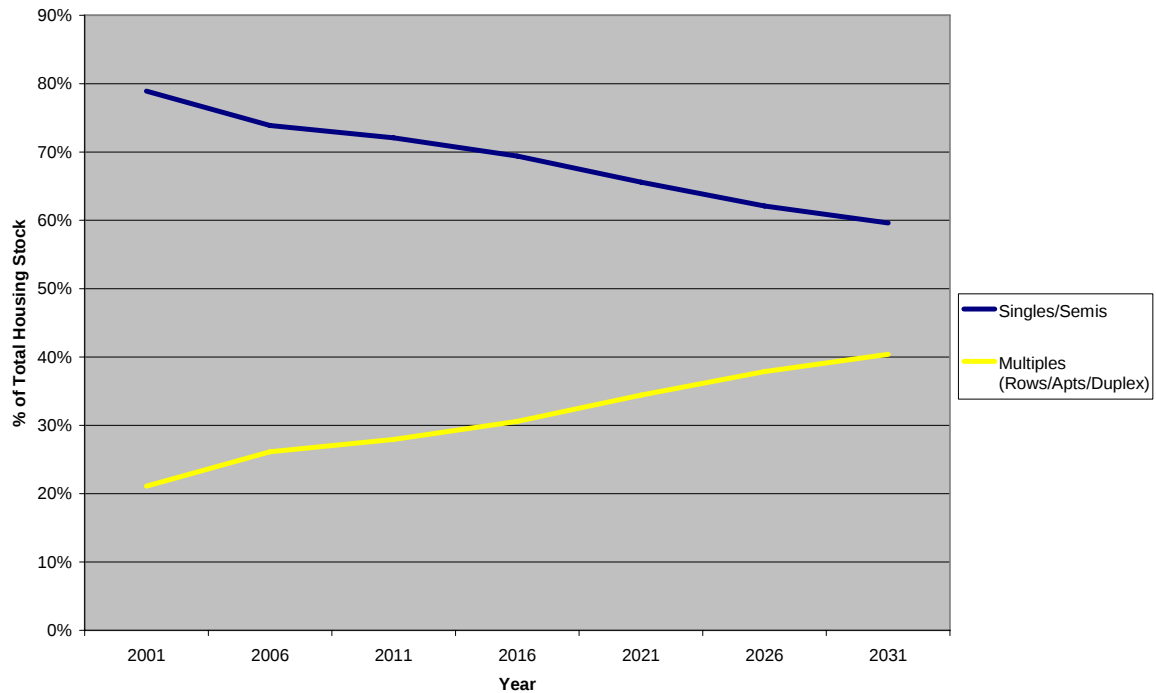
The preferred scenario is based on the assumption that 40% of all new residential growth across the Region from 2015 and beyond will be accommodated through intensification. As illustrated in *Figure 1* (above), 37% of the growth between 2006 and 2031 will be within intensification areas. The slightly lower level of intensification is the result of a gradual increase from the existing levels of intensification to 40% by 2015 and maintaining 40% for each year thereafter to 2031. However, the level and location of intensification by local municipality will be further refined in local municipal intensification strategies. Of the required 87,400 units, over 50,000 of those units already have some level of approval (includes existing applications, build-out of communities within the built boundary, Regional Centres and Corridors).

Shift to more compact housing mix

Over the next 25 years, the housing mix in York Region is anticipated to shift towards a more compact built form. As illustrated in *Figure 2*, by 2031, the proportion of single- and semi-detached dwellings is anticipated to decline from 79% of the total housing stock to 60%. Meanwhile, the proportion of multiple units (rows, apartments and duplexes) will increase over next 25 years and beyond. The shift towards a more compact urban

form is the result of demographic trends such as an aging population, smaller household sizes and more people living alone, in combination with a policy environment that promotes transit supportive compact urban form.

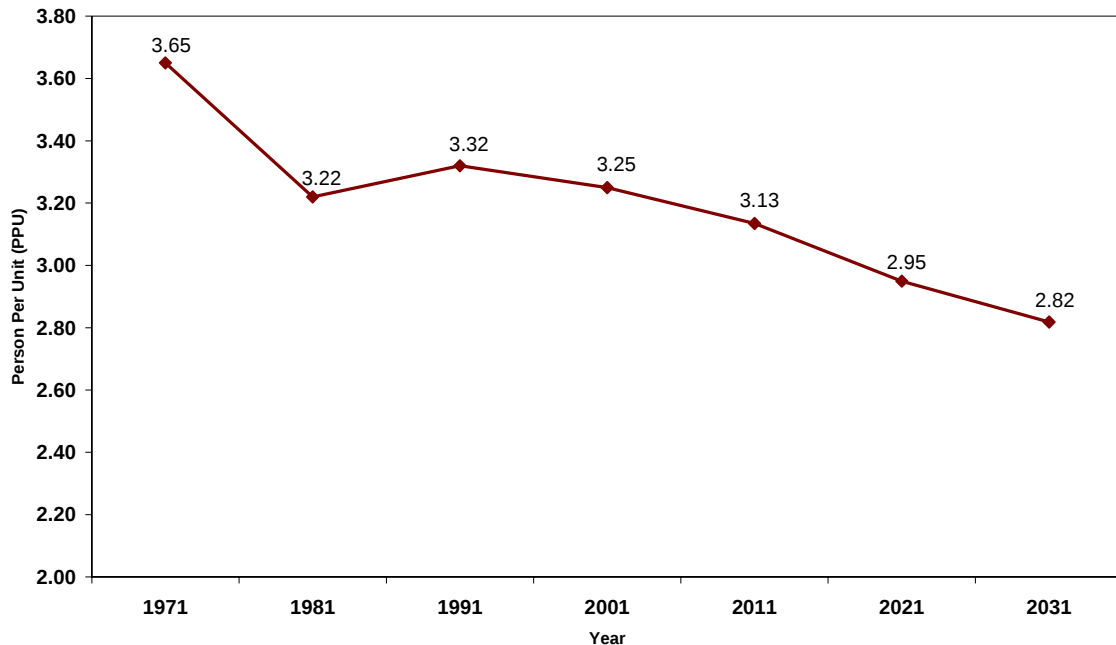
Figure 2: York Region Total Housing Mix 2001 to 2031



The average number of persons per unit is anticipated to decline

The average number of persons per unit in York Region is anticipated to decline from 3.22 in 2006 to 2.82 in 2031 (see *Figure 3*). This decrease in persons per unit is consistent with the anticipated shift towards a more compact housing mix. The decline reflects various factors such as an aging 'Baby Boomer' population that is approaching retirement and a trend towards generally smaller household sizes (i.e. single parents, lower birth rates, more people living alone and an increase in 'empty nesters').

Figure 3: York Region Average Persons Per Unit 1971 to 2031



The anticipated reduction in the number of persons per unit (PPU) is a key assumption in the population forecast. A slight adjustment in the forecast PPU can result in significant differences in the forecast population as the PPU is applied to the forecast household growth to generate population. Staff will be monitoring PPU trends carefully at each census period and revising the forecast appropriately.

4.3 EMPLOYMENT FORECAST

Adding 336,000 Jobs in York Region by 2031 will be a challenge

Based on York Region's Employment Survey, there were approximately 462,000 jobs in York Region as of mid-year 2006. These jobs are within a variety of industry sectors with the largest proportion of employment in service-producing sectors. By 2031, approximately 799,000 people will be employed in York Region. This represents an increase of 336,000 jobs or 13,500 jobs per year over 25 years. The forecasted employment growth is approximately 20,000 jobs higher than the *Places to Grow* target and reflects York Region's continued efforts to create and maintain a strong and balanced relationship between residents and jobs for each community.

Attracting and accommodating this level of employment growth is a major challenge in York Region. This requires the preservation of large geographic areas of strategically located lands for employment uses. A long term perspective to planning for employment

is a key factor in protecting these lands, particularly lands that are strategically located adjacent to major existing or proposed infrastructure such as 400 series highways. Despite the challenges, this is an opportunity for York Region to attract high quality sustainable employment that will help to maintain a high quality of life for the Region's residents.

Employment is divided into three categories

For the purposes of the forecast, York Region employment has been divided into three distinct land use categories: Major Office, Population Related and Employment Land Employment. A brief description of these three employment categories is provided below:

Major Office Employment

Major office employment is defined as employment occurring in office buildings of 1,860 square metres (20,000 sq.ft.) or larger. Finance, insurance and real estate activities and business services are typical examples of this type of office employment. City or town halls, police stations, hospitals and school board offices are not included in this category and are classified as population related employment. Major office employment can occur virtually anywhere within an urban area and typically does not require large vacant Greenfield land areas. Ideally, major office employment growth should be focused along Regional centres and corridors to better leverage infrastructure investment and promote transit use in the Region.

Population Related Employment

Population related employment consists primarily of employment which serves the local population such as retail services, education services, municipal government services, social and community services, medical services and local office uses (local banks, local legal and accounting offices etc). This employment tends to evolve according to the location of the resident population.

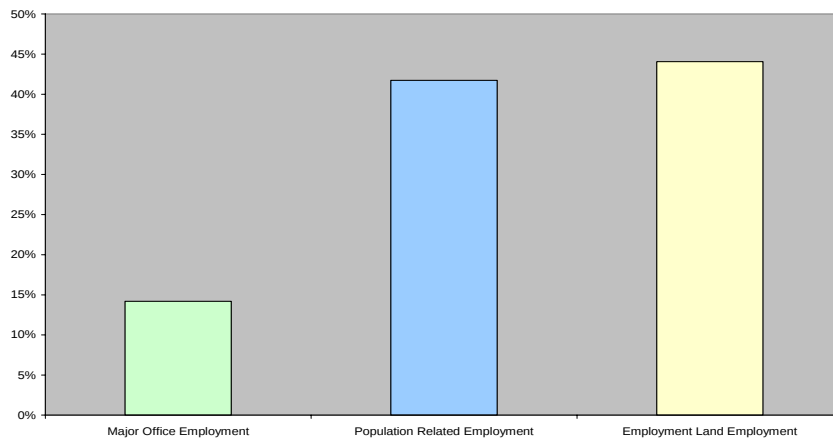
Employment Land Employment

Employment land employment occurs in industrial or employment areas and includes such activities as manufacturing, research and development, wholesale, warehousing, distribution, ancillary uses etc., and does not include employment already classified in the other two categories. Employment land employment includes a number of industry sectors and includes a portion of ancillary uses such as small scale office and retail uses. This type of employment generally requires new vacant land for development.

Based on the York Region Employment Survey, the current distribution of employment by category includes 44% employment lands (including ancillary uses), 42% population related and 14% major office (refer to *Figure 4*). Over the next 25 years, employment

totals are forecast to increase in all employment categories. However, the rate of growth of both major office and employment land employment is anticipated to exceed the growth in population-related employment.

Figure 4: York Region Employment by Category 2006

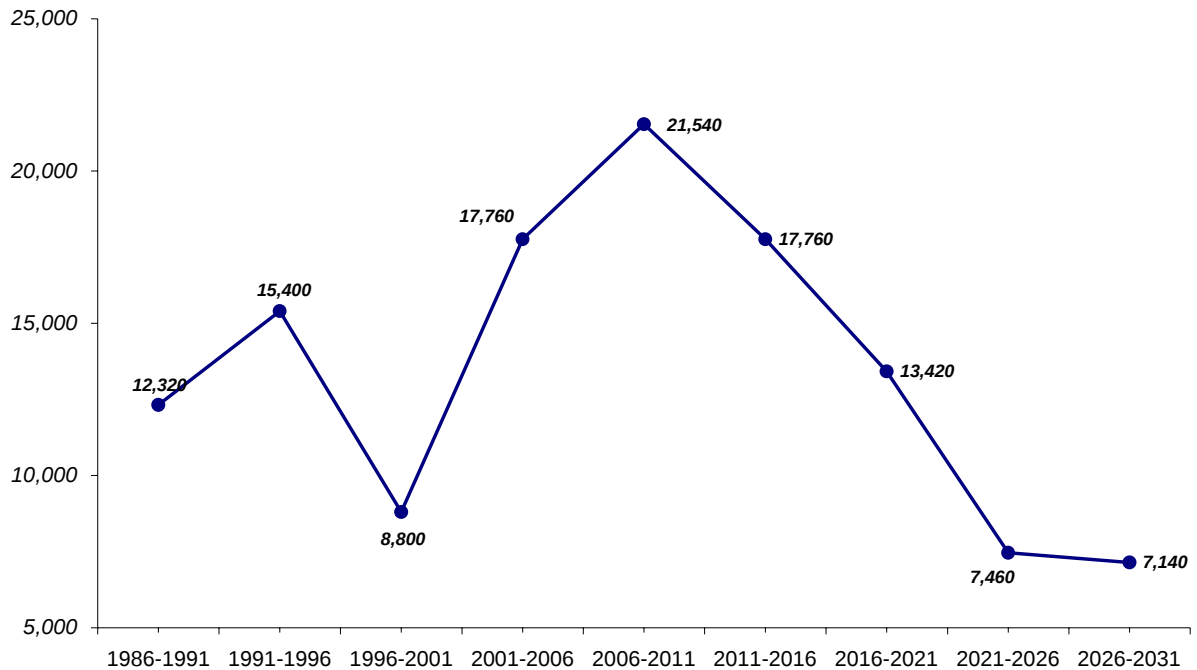


Employment growth is strongest between 2006 and 2021

Based on the preferred scenario, employment growth occurs most rapidly between 2006 and 2021, with slower growth recorded in subsequent years. This is the result of stronger labour force growth occurring during the next 15 years. The retirement of the baby boom generation, a declining population growth rate and the aging of society results in a significantly slower rate of growth post 2021.

Since 1998, York Region has produced between 15,000 and 20,000 jobs per year. At the peak of the anticipated employment growth in 2011, York Region will add 20,000 to 22,000 jobs per year. Beyond 2021, the employment growth rate moderates to approximately 7,000 to 10,000 new jobs per year (*Figure 5*).

**Figure 5: York Region Annual Employment Growth by 5 year Period
1986 to 2031**



Employment anticipated to increase in all local municipalities

Employment growth is anticipated to occur in all of York Region's local municipalities. However, the level of growth for each local municipality is dependent on a number of factors such as:

- The current supply of available designated lands.
- Intensification potential within Regional Centres and Corridors.
- The availability of 'Whitebelt lands' for future development.
- The existing and planned employment densities.

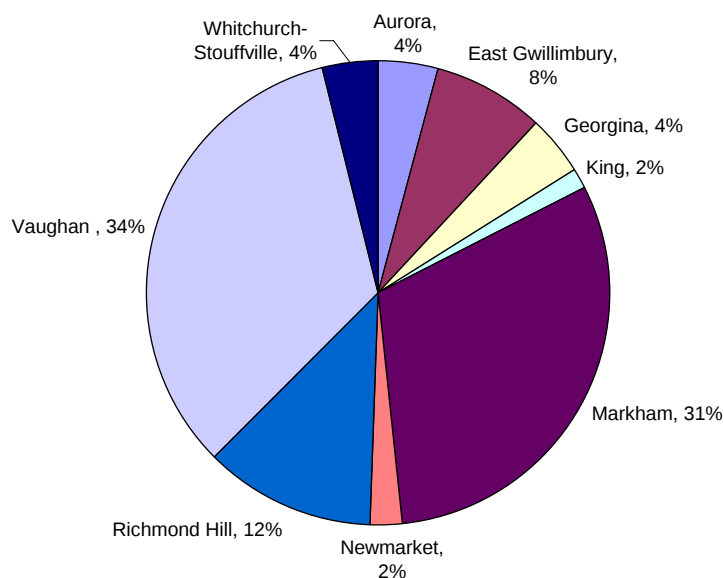
As illustrated in *Table 2* and *Figure 6*, the largest percentage of the employment growth in York Region to 2031 will be focused in the southern municipalities of Vaughan, Markham and Richmond Hill. The ongoing challenge in York Region will be attracting the amount of job growth required to maintain a strong balance between population and employment.

Table 2: Total Employment by Local Municipality (2006 to 2031)

Municipality	Total Employment 2006	Total Employment 2031	Employment Growth 2006-31	2006-31 Share of Growth (%)	2006-31 Avg Annual Increase (%)
Aurora	20,300	34,700	14,400	4%	2.2%
East Gwillimbury	5,900	31,800	25,900	8%	7.0%
Georgina	8,000	21,700	13,700	4%	4.1%
King	7,100	12,100	5,000	2%	2.2%
Markham	144,800	248,500	103,700	31%	2.2%
Newmarket	42,100	49,700	7,600	2%	0.7%
Richmond Hill	61,100	100,600	39,500	12%	2.0%
Vaughan	162,200	275,900	113,700	34%	2.1%
Whitchurch-Stouffville	10,900	23,700	12,800	4%	3.2%
York Region	462,400	798,700	336,300	100%	2.2%

Over the forecast period, the distribution of growth throughout the Region is anticipated to shift significantly. The municipalities of East Gwillimbury and Georgina will play a more prominent role in accommodating future employment growth. These two municipalities currently account for approximately a 2% share of employment land employment growth. During the last five year period of the forecast (2026 to 2031), approximately 43% of employment land employment growth in York Region is forecast to locate within either East Gwillimbury or Georgina.

Figure 6: Local Municipal Shares of Total Employment Growth 2006 to 2031



4.4 YORK REGION LAND REQUIREMENTS

The level of growth forecasted in the next 25 years in York Region will have significant land requirements for both population and employment. Each local municipality currently has designated lands for both residential and employment uses. However, additional approvals will be necessary in the Region in order to accommodate the forecast growth. A number of local municipalities can accommodate no additional Greenfield growth beyond what is available within the existing urban areas. As these municipalities mature they will rely on increased levels of intensification to accommodate growth.

Population and employment growth will require additional land approvals

The forecasted demand for additional population and employment growth will have significant land requirements beyond the existing designated land supply. The majority of this growth will occur in three distinct 'Whitebelt' areas that are not currently designated which are outside of both the Oak Ridges Moraine and the Greenbelt. These areas are generally in the northern portion of both Vaughan and Markham as well as in East Gwillimbury (refer to *Attachment 2*). These municipalities will accommodate a larger proportion of the residential and employment growth to 2031 and beyond.

The current designated supply of vacant lands will accommodate residential growth from 9 to 14.5 years, and employment growth 8.5 to 14 years.

Vacant Residential Supply Highlights

A residential supply analysis as of mid-year 2008 was undertaken by staff. The 2005 vacant residential unit supply inventory (PEDC Report No. 2, 2006) was updated to mid-year 2006 to match the forecast base year, and then to mid-year 2008 using Canadian Mortgage and Housing Corporation (CMHC) data. This updated inventory includes additional designations since 2005 (i.e. Leitchcroft in Markham, 2C lands in Aurora) as well as verification of potential supply in existing secondary plan areas. There is a total potential supply of approximately 123,000 vacant residential units within approved urban areas in York Region as of June 30, 2008.

There are two significantly different housing markets; the ground-related market attracts a different type of demographic than the multiple housing market. The ground-related unit supply has been analyzed based on the preferred forecast scenario demand, as well as using a 10-year historical average completion rate (1997-2006) from CMHC. The ground-related supply includes single-detached, semi-detached, and row units. The preferred scenario demand equates to approximately 6,100 ground-related units per year. The CMHC rates are based on approximately 9,500 ground-related units completed per year from 1997 to 2006, reflecting a strong housing market over that period.

There is a total potential ground-related supply of approximately 87,900 units in York Region. This regional ground-related supply total includes over 8,000 units in Queensville that are currently encumbered pending the Highway 404 extension and the expansion of wastewater services into the area, and approximately 4,500 ground-related units in the surrounding communities of Sharon and Holland Landing also depending on the provision of wastewater services. Refer to *Attachment 3* for a detailed breakdown of residential supply by local municipality.

Based on the preferred forecast scenario demand, there is approximately 14.5 years of ground-related supply region-wide as of mid-year 2008 (*Table 3*). Based on the 10-year average CMHC completion rate for ground-related units in York Region, as of 2008 there is approximately 9 years supply. Regional Official Plan policies state that the Region should maintain a minimum 10 year supply of land designated for housing.

Table 3: York Region Residential Forecast Supply Analysis

Supply Detail	Unit Supply 2008	Current Years Supply (2008)	
		Forecast Demand	Historical Demand ¹
Total Ground-Related Supply ²	87,900	14.5	9.0
Southern York Region ³	44,400	11.5	5.3
Northern York Region ⁴	43,500	18.9	25.9

Source: York Region Planning & Development Services Department, 2008.

¹Based on 10-year average Canadian Mortgage and Housing Completion Rates

²Ground-related supply includes singles, semis and rows

³Southern municipalities include Markham, Richmond Hill, Vaughan

⁴Northern municipalities include Aurora, East Gwillimbury, Georgina, King, Newmarket, Whitchurch-Stouffville

There is significant variation of residential supply at the local level. In the southern three municipalities of Markham, Richmond Hill and Vaughan, the preferred forecast demand indicates approximately 11.5 years of ground-related supply (*Table 3*). Using a 10-year average CMHC completion rate for the southern three municipalities indicates just over 5 years supply as of mid-year 2008. Conversely, in the municipalities north of the moraine the forecast demand indicates nearly 19 years supply of ground-related units (or nearly 26 years at CMHC rates).

Even when accounting for the 40% intensification requirement, York Region falls short of the 2031 forecast, requiring approval for an additional 33,100 units. The shortfall is almost exclusively in ground-related units (94%, or 31,200 units).

Generally, planning approvals for new communities can take upwards of 10 years or more. If current demand for ground-related housing in Southern York Region is maintained, additional residential lands could be required in just over five years. Given

that Whitebelt lands with all development approvals could be required as early as 2013, it is therefore important to proceed with urban boundary expansions.

Vacant Employment Land Supply Highlights

The 2006 York Region Vacant Employment Land Inventory reported a supply of 2,894 net hectares of vacant employment land. This supply includes IPS lands (industries on private services that cannot accommodate regular employment land densities) and encumbered lands (in West Vaughan and Queensville that are not readily available for development due to infrastructure constraints). (Note: The term net area refers to developable parcels excluding infrastructure, open space and environmental features.) Removing the encumbered and IPS lands from the inventory leaves a total of 1,893 net hectares of land available for development. This is illustrated in *Table 4* below:

Table 4: York Region Vacant Employment Lands 2006

Municipality	Total		Encumbered		Industry on Private Services		Net Total	
	Hectares	Acres	Hectares	Acres	Hectares	Acres	Hectares	Acres
Aurora	137	337	0	0	0	0	137	337
East Gwillimbury	340	841	182	450	45	112	113	279
Georgina	108	268	0	0	46	113	63	155
King	96	237	0	0	4	9	93	228
Markham	479	1,183	0	0	0	0	479	1,183
Newmarket	59	147	0	0	0	0	59	147
Richmond Hill	210	519	0	0	0	0	210	519
Vaughan	1,269	3,136	628	1,552	0	0	641	1,584
Whitchurch-Stouffville	196	483	0	0	97	239	99	244
York Region	2,894	7,151	810	2,002	191	472	1,893	4,677

Source: York Region Planning and Development Services Department, October 2007.

Since mid-year 2006, the inventory has been updated to account for approximately 144 hectares of vacant employment land that will be required for future major office uses and for some minor modifications to the 2006 inventory figures. In addition, approximately 201 net hectares of land that have been added to the inventory due to additional designations. These include the Keswick Business Park and the Aurora 2C lands. As a result, there are 1,950 net hectares of available vacant employment lands in York Region (excluding the encumbered and IPS lands).

Table 5: York Region Employment Land Supply

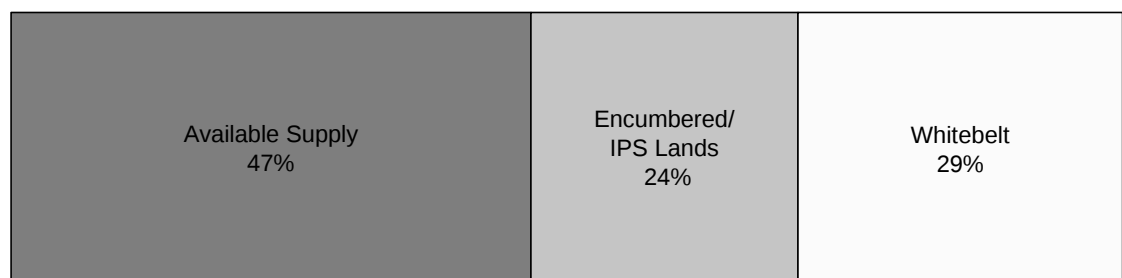
Available York Region Supply*	1,950 Hectares
Forecasted Demand (50 jobs/Net Ha)	182 Hectares per year
Years Supply (2006)	10.5 years
Years Supply (2008)	8.5 years

**Note: Available supply excludes Encumbered & IPS lands*

Source: York Region Planning and Development Services, 2008

Over the last 5 years, York Region's employment land absorption rates have averaged approximately 125 net hectares per year. However, the preferred scenario forecasts increased employment land absorption, averaging approximately 182 hectares per year over the first 15 years of the forecast. Based on this forecasted employment land absorption rate, there is an 8.5 year supply of employment lands (excluding encumbered and IPS lands) (as shown in *Table 5* above). The inclusion of encumbered and IPS lands adds an additional 5.5 years of supply in York Region (Note: This absorption rate assumes that serviced employment lands will be built at a 50 jobs per net hectare density, while IPS lands will be built at 15 jobs per net hectare). More detailed employment land supply analysis by local municipality will be provided in upcoming reports in the fall or 2008.

**Figure 7: York Region Employment Land Growth
2006 to 2031**



Inaccessible lands

When determining land supply needs it is important to consider lands that may appear vacant, but are inaccessible for development. The availability of lands can be affected by a number of market forces that are difficult to predict such as non-participating land owners that are not interested in using their lands for the planned function and owners that offer design, build, lease agreements rather than offer ownership opportunities. These market driven factors are difficult to predict and can mean that a portion of the supply of vacant land (both residential and employment) is unavailable for development.

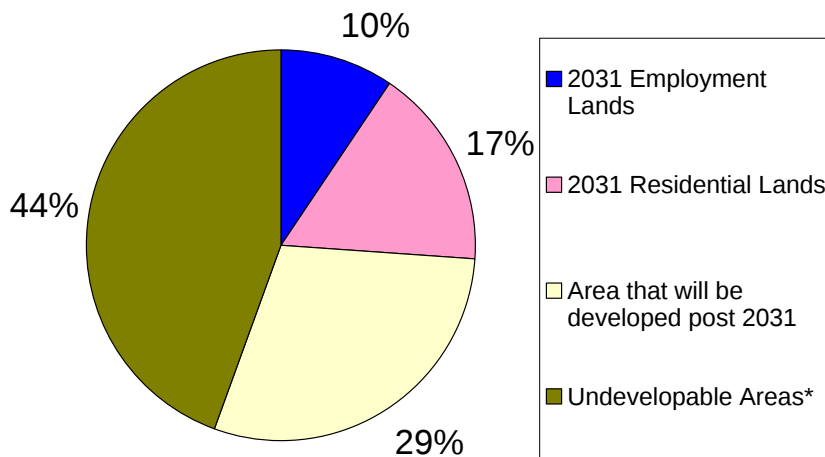
Whitebelt Lands Required to Accommodate Growth

The total area of York Region's Whitebelt lands is approximately 12,800 hectares. Approximately 44% of this area is undevelopable due to existing green areas (i.e. greenbelt and natural heritage) and other uses (i.e. regional roads, cemeteries, golf courses, estate lots, etc.), resulting in approximately 7,090 hectares of developable area. The Whitebelt lands are located within three distinct areas: Vaughan & King, Markham & Whitchurch-Stouffville, and East Gwillimbury (refer to *Attachment 2* for Whitebelt areas and growth distribution). A small portion of Richmond Hill (i.e. North Leslie) is also considered Whitebelt lands. This area was assumed to be required for development by 2031 in addition to the Whitebelt lands identified and discussed in this section.

An analysis of residential and employment land requirements was completed to determine the need for additional designations in the Whitebelt areas. In the residential analysis, the total household growth to 2031 was compared to approved Greenfield and intensification growth to generate a residential land requirement in the Whitebelt. For employment, employment land employment growth to 2031 was compared to the current vacant employment land potential to generate employment land requirements in the Whitebelt. This analysis was completed within the context of the 50 people and jobs per hectare target outlined in *Places to Grow* and may require further refinement.

Based on this analysis, approximately 3,400 additional developable hectares of land in the Whitebelt will be required for residential and employment uses to 2031. These lands account for approximately half of the total developable area in the Whitebelt. *Figure 8* provides more detail on the Whitebelt land requirement for 2031. Further detail on the forecast methodology and land budget will be available in upcoming reports in the fall of 2008.

Figure 8: York Region Whitebelt Lands



*Includes Green areas (greenbelt & natural heritage) and other uses (regional roads, cemeteries, golf courses, estate lots, etc.)

4.5 RISK MANAGEMENT

The preferred forecast is based on several key assumptions, including a strong shift to intensification units, a declining PPU (average persons per unit), a decreasing demand for single-detached and semi-detached units (ground-related), and a continued demand for employment land based on the Region's existing economic structure.

For example, if the ground-related market is higher than the forecast, this will have implications for the land budget and the amount of Whitebelt lands required. Similarly, there may be a shift to more land extensive warehousing and distribution type employment uses that would impact the amount of employment land required.

Therefore, there is a need to carefully monitor the forecasts, and make adjustments when necessary. These risks could potentially have serious implications with regard to land supply shortages, a loss of strategic lands for employment uses, as well as fiscal impacts for the Region related to the Development Charges revenue stream.

4.6 NEXT STEPS

York Region staff has scheduled a series of public meetings to consult with the public on the revised forecasts in September 2008. In total, five public meetings have been scheduled in various municipalities across York Region. The dates and location of the meetings are as follows:

September 17 th , 2008	Town of Markham
September 18 th , 2008	City of Vaughan
September 23 rd , 2008	Town of East Gwillimbury
September 24 th , 2008	Town of Richmond Hill
September 25 th , 2008	Town of Newmarket

The feedback from the series of public meetings will be reported to Committee in the fall of 2008. Presentations to local municipal Councils have also been scheduled in various municipalities as requested.

Staff will also continue to evaluate the preferred scenario through continued dialogue with local municipal staff and a more detailed analysis of the impact on human services, water and wastewater, transportation, natural heritage and the 25 year fiscal requirements in York Region. In early 2009, staff will be initiating a series of Regional Official Plan amendments to conform to *Places to Grow* and address land budget requirements.

4.7 RELATIONSHIP TO VISION 2026

Vision 2026 is York Region's strategic plan for the future that establishes the overall vision and direction for Regional Council and the Region's employees. Examining

growth trends on population, economic and employment growth in the GTA are essential elements for monitoring progress on the eight goal areas of Vision 2026 and for ensuring the programs and policies designed to achieve these goals are effectively implemented.

Population, household and employment forecasts are the basis for many corporate strategic planning initiatives including transportation planning, sewer and water infrastructure, growth management, human services, housing needs and development charges.

5. FINANCIAL IMPLICATIONS

With the amount of growth anticipated to occur in the Region over the next 25 years, investment in transportation, water and wastewater infrastructure, and human services is required. The Region is currently undertaking an assessment of the fiscal and economic implications and risks on the preferred scenario. There is a level of fiscal risk based on the forecast assumptions, related to the development charges revenue stream. Careful ongoing monitoring of financial implications will be necessary.

6. LOCAL MUNICIPAL IMPACT

The forecasts in this report have been prepared in consultation with local municipalities and agencies. Over the past two years, a series of technical meetings with local municipal staff have been held to refine the forecasts. The Region's growth management work is currently being undertaken in conjunction with local municipal growth management work. Discussions are ongoing with additional collaboration and forecast refinement anticipated in the coming months. When the forecasts are finalized, the local municipalities will use the proposed forecasts for long term planning initiatives, including growth management studies, capital infrastructure projects and social and health service programs.

7. CONCLUSION

Over the next 25 years, a significant amount of growth is forecast in York Region. The addition of approximately 577,000 people and 336,000 jobs will have considerable implications in terms of future land requirement. The current supply of available ground-related residential land is limited. In the southern three municipalities of Vaughan, Markham and Richmond Hill, the supply of available ground-related vacant residential land ranges from 5.3 years (based on historical demand) to 11.5 years (based on forecast demand). Currently, there is an available region-wide employment land supply of approximately 8.5 years. There is a need for additional employment land designations to

2031 and a need to preserve strategically located lands well beyond the 2031 planning horizon.

The preferred forecast is based on assumptions that require careful monitoring. Small shifts in these assumptions could have significant implications for land supply shortages, a loss of strategic lands for employment uses, and fiscal impacts.

Based on this analysis, staff will be proposing a series of Regional Official Plan amendments to conform to *Places to Grow*. These amendments will include urban boundary expansions and the designation of additional lands in the Whitebelt required to meet the 2031 forecasts.

The forecasts and land budget analysis presented in this report will be the basis for public consultation in September 2008. Staff will report back to Council on the feedback from the consultation process and present more detailed forecast and land budget analysis at the local municipal level in the coming months.

For more information on this report, please contact Paul Bottomley, Manager of Growth Management, Economy & Information Research at 905-830-4444, Ext. 1530 or John Waller, Director of Long Range and Strategic Planning at Ext. 1525.

The Senior Management Group has reviewed this report.

(The three attachments referred to in this clause are included with this report.)