



EMPLOYMENT LAND SUPPLY ANALYSIS

2021 - 2046

City of Brockville, ON

December 2021

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INTRODUCTION

The City of Brockville is completing the review of its Official Plan. The current Official Plan was adopted by City Council in 2010 and approved by the Minister of Municipal Affairs and Housing in February 2012.

As part of this review, the Official Plan update is recommending a planning horizon of twenty-five years or to the year 2046. This means the City must assess its land supply for both housing and employment to ensure there is a sufficient supply of land for the planned growth to 2046.

The Provincial Policy Statement (2020) identifies that municipalities must plan for growth and also identifies the requirements for growth. The following policies of the Provincial Policy Statement (2020) are relevant to this requirement of planning for growth:

1.1.2 Sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 25 years, informed by provincial guidelines. Within settlement areas, sufficient land shall be made available through intensification and redevelopment and, if necessary, designated growth areas.

1.1.3.8 A planning authority may identify a settlement area or allow the expansion of a settlement area boundary only at the time of a comprehensive review and only where it has been demonstrated that:

- a) sufficient opportunities to accommodate growth and to satisfy market demand are not available through intensification, redevelopment and designated growth areas to accommodate the projected needs over the identified planning horizon;*
- b) the infrastructure and public service facilities which are planned or available are suitable for the development over the long term, are financially viable over their life cycle, and protect public health and safety and the natural environment;*
- c) in prime agricultural areas:
 - 1. the lands do not comprise specialty crop areas;*
 - 2. alternative locations have been evaluated, and
 - i. there are no reasonable alternatives which avoid prime agricultural areas; and*
 - ii. there are no reasonable alternatives on lower priority agricultural lands in prime agricultural areas;***
- d) the new or expanding settlement area is in compliance with the minimum distance separation formulae; and*
- e) impacts from new or expanding settlement areas on agricultural operations which are adjacent or close to the settlement area are mitigated to the extent feasible.*

In undertaking a comprehensive review, the level of detail of the assessment should correspond with the complexity and scale of the settlement boundary expansion or development proposal.

This report addresses Policy 1.1.2 of the Provincial Policy Statement (2020) – determining land supply needs for the planning horizon to 2046 for employment land. A separate report has been prepared for residential land supply. Further reports will be provided identifying options for growth and will address PPS Policy 1.1.3.8 as well as the requirements of the City of Brockville Official Plan (Policy 3.2.3 regarding expansion of settlement areas) to analyze options for the location of any settlement area expansion to achieve the forecasted growth.

EMPLOYMENT FORECASTS

Population and employment forecasting was completed by *metroeconomics* for this Official Plan update. The summary analysis by *metroeconomics* can be found in Appendix A to this report. The City of Brockville is within the larger Brockville Census Agglomeration which includes the City of Brockville, August Township and Elizabethtown-Kitley Township. Analysis was completed recognizing this relationship and establishing forecasts to the year 2046 for employment for the City of Brockville.

The analysis of population has established a forecasted growth for the City of Brockville from 13,690 in 2021 to 2046 of 15,285 jobs in total employment or by 1,596. The forecasted employment growth is provided by Census Year with the following results for total employment.

| Year | Forecasted Employment (# of Jobs) |
|------|-----------------------------------|
| 2021 | 13,690 |
| 2026 | 14,106 |
| 2031 | 14,534 |
| 2036 | 14,895 |
| 2041 | 15,223 |
| 2046 | 15,285 |

Employment forecasting is categorized into major type of employment using the North American Industry Classification System (NAICS) to distribute the forecasted employment growth to major sectors. This is done to establish the categories of employment which are then used for analysis of available land supply to determine if there is sufficient land supply to achieve the forecasted employment growth.

The major employment sectors are:

- Employment
- Population Related Employment
- Office/Institutional

FORECASTING LAND SUPPLY NEEDS - EMPLOYMENT

The forecast of land supply needs for employment is completed through a series of steps of analysis. These are:

- a) Forecast employment (# of jobs) to 2046,
- b) Forecast land area to accommodate forecasted employment,
- c) Determine existing employment supply,
- d) Determine employment need and land needed to support employment growth,
- e) Determine conformity to the Provincial Policy Statement requirements for planning for growth.

EMPLOYMENT LAND NEED

Employment land need is determined by completing the following steps:

1. Forecasting employment growth by major employment sectors.
2. Applying sector specific job ratios to determine forecasted land supply needed for each major employment sector.

Major Employment Sector Forecast – 2046

metroeconomics began by carrying out a Location Quotient (LQ) assessment of the jobs provided by employers by industry within the CA. This procedure – which is undertaken to assess which industries are driving the local economy of the area – compares jobs by place-of-work (POW) per capita in the CA to the same ratios Ontario-wide. Where the CA's ratios exceed the provincial average it is concluded they are in excess of normal local population-serving needs. They therefore must be either providing goods which are exported out of the region or providing services to temporary residents or visitors to the region. This process is said to determine which jobs are Export Based (EB) and which are Community Based (CB). In this procedure all jobs in agriculture, mining and manufacturing are assumed to be Export Based.

Employers provided 15,880 jobs in total within the Brockville CA in 2016 of which 4,265 were found to be EB jobs (or 27 percent of the total). The 4,265 break down by industry as follows:

- Manufacturing 2,100
- Health and social services 1,079
- Agriculture 535
- Retail trade 336
- “other” (that is, not professional) business services 188
- Mining, oil and gas 25
- Construction 2

Based on the Ontario-wide projections we expect manufacturing and agriculture jobs will hold steady or decline in the future while health care and retail trade jobs will grow. On balance Brockville's EB jobs will increase modestly in the years ahead.

The Supply of Labour in the Brockville Census Agglomeration Area (CA)

The population of the CA as of 2020 is older than that of the average Ontario community. The CA's population is almost evenly split between people under 50 years of age (49 percent) and people 50 and over (51 percent). For Ontario as a whole the shares are 62 percent under 50 and 32 percent over 50. The Baby Boom generation as of 2021 between the ages of 55 and 75. So the Brockville CA's population is heavily weighted toward this group.

Every community in Canada faces the need to replace retiring Baby Boomers between now and the mid-2030s. Because of their relative prevalence retiring Boomers pose a greater challenge for the Brockville area than for most of Ontario. As the Boomers gradually retire over the next two decades they will need to be replaced. The solution: attract migrants to the area to fill the jobs as they are vacated by the Boomers. Canada's national immigration targets have already been adjusted upwards recognizing all parts of the country must deal with this phenomenon. The immigration targets will remain higher than normal for some time.

The upshot: the population of the Brockville CA will increase in the decades ahead as its economic base jobs grow due to modest economic expansion and because the retiring-Boomer issue means they must be replaced. These factors together mean the CA's population will grow in the decades ahead thus reversing the relative standstill prevailing since the mid-1980s.

metroeconomics' projection system – described in detail in the Appendix – takes account of these interwoven economic and demographic factors. Stated simply: EB jobs grow, Boomers retire, people migrate to the area to satisfy labour market needs. Most Boomers retire locally so the in-migration increases the population. The increased population increases the need for private and public sector services which, in turn, leads to further in-migration . . . etc.

Where people and jobs are permitted to locate within the Brockville CA in the future are less questions to be answered by demographic and economic models and more to be answered by planning best practices and policies.

Table –Major Employment Sector Growth: 2021 to 2046

| Sector | Forecasted Jobs – 2021 | Forecasted Jobs – 2046 | Growth 2021-2046 |
|-----------------------------|------------------------|------------------------|------------------|
| Employment Land | 3,540 | 3,953 | 413 |
| Population Related | 5,901 | 6,589 | 688 |
| Office/Institutional | 4,249 | 4,774 | 495 |
| | | | |
| TOTAL | 13,690 | 15,285 | 1,596 |

Employment – Land Supply Forecast

Forecasting employment land needs is based on the analysis by sector using sector specific methods. Each sector method is described below.

Employment Land

Employment Land analysis is completed using a jobs per hectare based on experience in Ontario communities. These jobs are typically found in industrial areas and business parks. Employment land density for these types of employers can range between 15-35 jobs per hectare dependent on the industry. For this analysis, a density of 25 jobs per hectare is utilized.

Based on a forecasted increase of 413 jobs in employment land areas, this results in the need for an additional 16.5 hectares of employment land over the forecast period.

Population Related Land

Population related employment consists of those jobs that are to serve the resident population and are generally related to services for residents of Brockville.

The method to determine the population related land supply is as follows:

1. Determine the number of forecasted jobs.
2. Apply a standard square foot per employee multiplied by the number of jobs. For this analysis, the square foot per employee is 400 which was obtained from the City's Development Charges Background Study.
3. Population related employment typically is found in buildings and developments that have a percentage of the land for parking, loading and landscaping. The land utilized for this is estimated at 35% of the site which is applied to increase the overall land supply.
4. The final determination of land is calculated using the addition of Steps 2 and 3.

Table – Population Related Employment Land Calculation

| Step | Quantum |
|--|---------|
| Forecasted Jobs | 688 |
| | |
| Square Foot / Employee (@ 400) | 275,100 |
| | |
| Add development factor to address parking/loading | 96,285 |
| | |
| Total Square Footage | 371,385 |
| | |
| Conversion to Hectares | 3 ha |
| | |

The required land to support the population related employment to 2046 is 3 hectares.

Office/Institutional Land

Office employment is based on sectors that typically occupy offices and includes education, health, social services, and government.

The method to determine the population related land supply is as follows:

1. Determine the number of forecasted jobs.
2. Apply a standard square foot per employee multiplied by the number of jobs. For this analysis, the square foot per employee is 700 which was obtained from the City’s Development Charges Background Study.
3. Population related employment typically is found in buildings and developments that have a percentage of the land for parking, loading and landscaping in business park areas as well as in downtown Brockville. The land utilized for this is estimated at 25% of the site which is applied to increase the overall land supply.
4. The final determination of land is calculated using the addition of Steps 2 and 3.

Table – Office/Institutional Employment Land Calculation

| Step | Quantum |
|------------------------|---------|
| Forecasted Jobs | 495 |

| | |
|--|---------|
| | |
| Square Foot / Employee (@ 700) | 346626 |
| | |
| Add development factor to address parking/loading | 121,319 |
| | |
| Total Square Footage | 467,945 |
| | |
| Conversion to Hectares | 4 |
| | |

The required land to support the office/institutional employment to 2046 is 4 hectares.

EXISTING EMPLOYMENT SUPPLY

Employment Land Supply analysis of vacant employment land has been completed by the City of Brockville with the information provided in the Appendix. The supply is shown in the following table.

Table – Vacant Land Supply

| Sector | Vacant Land (Ha) |
|---------------------------|-------------------------|
| Employment | 203.37 |
| | |
| Population Related | 39.82 |
| | |
| Institutional | 9.82 |
| | |

The City of Brockville does not categorize land for office. However, office employment is provided in the Mixed-Use Node (Population Related Employment) as well as in the Institutional Land Category. These two categories together are the available land supply for Office/Institutional.

LAND NEEDED FOR EMPLOYMENT GROWTH

The overall analysis of forecasted housing units needed compared to the available supply yields the following results.

Table – Net Results of Employment Land Required

| Category | Forecasted Land Required (ha) | Available Supply (ha) | Additional Land Needed |
|-----------------------------|-------------------------------|-----------------------|------------------------|
| Employment | 16.5 | 186.93 | 0 |
| Population Related | 3 | 39.82 | 0 |
| Office/Institutional | 4 | 9.82 | 0 |

PROVINCIAL POLICY STATEMENT (2020) CONFORMITY

The Provincial Policy Statement requires the City of Brockville to confirm the supply of employment land is sufficient to meeting needs for the forecast period – 2046.

The following are the relevant policies from the Provincial Policy Statement.

1.3.1 Planning authorities shall promote economic development and competitiveness by:

- a) providing for an appropriate mix and range of employment, institutional, and broader mixed uses to meet long-term needs;*
- b) providing opportunities for a diversified economic base, including maintaining a range and choice of suitable sites for employment uses which support a wide range of economic activities and ancillary uses, and take into account the needs of existing and future businesses;*
- c) facilitating the conditions for economic investment by identifying strategic sites for investment, monitoring the availability and suitability of employment sites, including market-ready sites, and seeking to address potential barriers to investment;*
- d) encouraging compact, mixed-use development that incorporates compatible employment uses to support liveable and resilient communities, with consideration of housing policy 1.4; and*
- e) ensuring the necessary infrastructure is provided to support current and projected needs.*

1.3.2.1 Planning authorities shall plan for, protect and preserve employment areas for current and future uses and ensure that the necessary infrastructure is provided to support current and projected needs.

1.3.2.2 At the time of the official plan review or update, planning authorities should assess employment areas identified in local official plans to ensure that this designation is appropriate to the planned function of the employment area.

Employment areas planned for industrial and manufacturing uses shall provide for separation or mitigation from sensitive land uses to maintain the long-term operational and economic viability of the planned uses and function of these areas.

The City of Brockville completed an Employment Land Strategy and Official Plan update to implement the Strategy in 2019. The current Official Plan identifies areas for future employment that achieve the PPS (2020) requirements through:

- Designation of employment areas in the Official Plan through land use designations and policies that implement the PPS (2020) requirements related to protection of the employment lands and separation of employment lands from sensitive land uses;
- Includes commercial and mixed-use designations and sufficient land to support the forecasted growth in population related employment;
- Incorporates office employment in existing Institutional areas and downtown Brockville.

A separate report on Land Supply Options has been prepared as part of this Official Plan Review. The Land Supply Options Report identifies options for the needed residential growth. No lands are identified for employment land conversion as part of the Land Supply Options Report. Although there is a strong supply of employment land in Brockville, conversion of any employment land is not recommended in order to protect the supply for the long term and to ensure no incompatible land uses are introduced in the vicinity of the employment areas. This approach is consistent with PPS (2020) policy recognizes the importance of the long-term protection of employment areas. The current employment areas are within the existing settlement area boundary in Brockville.

Based on this analysis, no additional land is needed for employment to the forecast year of 2046. Further, the analysis of employment conforms to the PPS (2020).

APPENDIX 1 – FORECAST METHODOLOGY

Economic and Community Base Jobs

Employment by industry in any given area can be decomposed into economic base jobs (those that drive the overall economy) and community base jobs (those that serve the local population). The population growth of an area typically depends on its potential for growth in economic base employment while an area's growth in community base employment depends on its population growth. In recognition of this interdependence between population and employment growth *metroeconomics* developed a community-based projection system that takes account of the economic and demographic factors influencing an area's growth potential. The system takes these factors into account as follows:

- the economic base of the community is identified through the de-composition of local jobs on a place of work basis by industry into those that are *economic base* jobs and those that are *community base* jobs; this is achieved using a location quotient process.
- economic base industries produce goods and services consumed primarily by businesses or people outside of the local community; these industries – also called export-based industries – produce agriculture, mining, or manufactured products for consumption elsewhere or provide tourism or higher-order education/health care services to visitors/temporary residents.
- the potential for growth of a local community's economic base jobs is identified through assessing how many such jobs exist today and how many might exist in the future drawing on *metroeconomics'* extensive forecasts of economic base industrial job trends nation-wide and province-wide.
- an assessment is also made of the potential for residents to commute to jobs in nearby employment locations drawing on existing patterns and on *metroeconomics'* base case forecasts of such jobs by sub-provincial area across the country.
- the potential for job growth within the local area and for job growth in nearby locations determines the potential for job growth among residents.
- the *metroeconomics* system ties this resident job growth potential to the demographic side of the community; if potential job growth among residents exceeds the current supply of workers (based on an age and gender assessment of the current population, age specific rates of labour force participation, the level of unemployment, and the need to replace retiring workers), in-migration occurs; thus job growth potential determines population growth potential recognizing each new job-holding resident typically brings along one or two dependents.
- the system further considers the fact that each new resident jobholder increases the need for workers who service the local population – the community base jobs – and that these additional community base jobs, in turn, create the need for more workers, more residents, etc.
- growth in employed residents, in other words, drives the community's net in-migration requirements which, along with standard assumptions regarding fertility and mortality rates, provide the parameters needed to develop local area population projections by age and gender.

- projected economic base jobs by industry are added to projected community base jobs by industry to determine the total number of jobs by place of work that will exist in the community in the decades ahead.

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The Location Quotient procedure is carried out as follows:

- All jobs in agriculture and forestry, in mining and oil and gas extraction, and in manufacturing are economic base jobs as most of their production is consumed by businesses and people outside of the area.
- For all other industries, the number of jobs per 1,000 residents in the area is compared to that ratio across the relevant province. Where the ratio in an industry in the area exceeds that of the province it is assumed the excess jobs in the area are providing services to people or businesses outside of the area. These excess jobs are defined as export-based service jobs and their output as exportable services.

APPENDIX 2 – EMPLOYMENT LAND SUPPLY BY MAJOR CATEGORY

Employment Land

| | Description | Roll Number | Area (Acres) | Zone | |
|------------------------|--|-----------------|--------------|-----------------|--|
| Employment Land | | | | | |
| 1 | Northwest Industrial Park / Employment Lands City Owned | 080203007514707 | 22.10 | E2-5 | |
| 2 | Northwest Industrial Park / Employment Lands City Owned | 080203007504010 | 41.00 | E2-5 | |
| 3 | Northwest Industrial Park / Employment Lands City Owned | 080203007501900 | 26.34 | EP, E2-5 & RU-1 | |
| 4 | Northwest Industrial Park / Employment Lands City Owned | 080203007502000 | 7.80 | H3-E2-5, EP | |
| 5 | Brockville Highland Golf Ltd. / Employment Lands | 080203007501500 | 23.67 | RU | |
| 6 | Brockville Highland Golf Ltd. / Employment Lands | 080203007501600 | 15.00 | RU | |
| 7 | Brockville Highland Golf Ltd. / Employment Lands | 080203007501700 | 11.61 | RU | |
| 8 | Brockville Highland Golf Ltd. / Employment Lands | 080203007501800 | 11.00 | RU | |
| 9 | Canarm | 080201003017000 | 4.16 | C6 | |
| 10 | Toronto Oil | 080201003017230 | 2.11 | E1 | |
| 11 | Gay-Lea | 080201003044800 | 17.71 | E1 | |
| 12 | RANKIR Holdings Inc. | 080203007030303 | 11.58 | E2 | |
| 13 | Trustee Stonewater Properties Brockville Inc. | 080203007026000 | 40.89 | E2 | |

| | | | | | |
|-------------------------|-----------------------------------|-----------------|---------------|-------|--|
| 14 | APEX Logistics Inc. | 080203007029500 | 22.00 | E2-3 | |
| 15 | A & B GREEN ACRES INC. | 080201003018700 | 21.42 | H1-E1 | |
| 16 | 1622506 Ontario Inc | 080201003045834 | 2.00 | E1 | |
| 17 | 1602620 Ontario Ltd | 080201003045803 | 10.96 | E1 | |
| 18 | CITY OF BROCKVILLE | | 8.97 | E1 | |
| 19 | CITY OF BROCKVILLE | | 11.60 | E1 | |
| 20 | GT Wholesale Limited | 080201003017228 | 11.34 | E1 | |
| 21 | 2678210 Ontario Inc. | 080201003045500 | 129.08 | E1 | |
| 22 | Travis Price | 080201003042700 | 4.79 | H1-E1 | |
| 23 | Ball | 080201003042800 | 5.00 | H1-E1 | |
| 24 | City of Brockville | 080201003044801 | 5.20 | E1 | |
| Total, Acres | | | 467.33 | | |
| Total, Ha | | | 186.93 | | |

Population Related Land

| Population Related Land | | | | | |
|-------------------------|--|---------------------------------|-------|---------------|--|
| 1 | Parkedale Inc. COPLEY Properties Parkedale Ave | 080203007512560 | 1.26 | C3 | |
| 2 | Parkedale Inc. COPLEY Properties Parkedale Ave | 080203007512570 | 1.71 | C3 | |
| 3 | R & DQ Enterprises Ltd (AVID) Kent Blvd. | 080203007512540 | 0.90 | C3-5 | |
| 4 | 1064898 Ont LTD C/O Highland Golf Course | 080203007501501 | 8.33 | H1-C3 | |
| 5 | Highland Golf Course Limited | 080203007501400 | 3.50 | H1-C3 | |
| 6 | Hydro One Networks Inc. - Assessment and Taxation | 080203007501301 | 0.82 | H1-C3 | |
| 7 | King & King | 080203007501300 | 1.90 | H1-C3 | |
| 8 | Perrin | 080203007501200 | 0.98 | H1-C3 | |
| 9 | Perrin | 80203007503200 & 80203007503200 | 13.67 | H1-C3 | |
| 10 | Burnbrae Holdings Ltd. / 121414 Canada Ltd. | 080203007513702 | 2.37 | H4-C3 | |
| 11 | Burnbrae Holdings Ltd. / 121414 Canada Ltd. | 080203007513701 | 5.54 | H1-C3 & EP | |
| 12 | 534499 Ontario Limited | 080203007515700 | 6.33 | H1-C4 | |
| 13 | Burnbrae Holdings Ltd. / 121414 Canada Ltd. | 080203007514700 | 5.63 | RU | |
| 14 | Hotel Brockville Crossroads Properties Inc. | 080203007517504 | 1.59 | C2-14 | |
| 15 | Dodge Enterprises Inc. | 080202005201900 | 1.90 | C2 | |
| 16 | Lanark Leeds Community & Primary Health Care | 080201003046400 | 6.67 | H5-C2-15 & EP | |

| | | | | | |
|----|--|-----------------|------|--------|--|
| 17 | Sandhu Dental Group | 080201003017213 | 2.24 | C6 | |
| 18 | Brooks | 080201002025100 | 6.42 | C2-6 | |
| 19 | Imperial Oil Limited | 080202003507000 | 0.39 | MD | |
| 20 | Hillhorst & Hall | 080202003509700 | 0.12 | MD | |
| 21 | Hillhorst & Hall | 080202003509600 | 0.22 | MD | |
| 22 | Hillhorst & Hall | 080202003518800 | 0.27 | MW | |
| 23 | Hillhorst & Hall | 080202003518700 | 1.00 | MW | |
| 24 | Hillhorst & Hall | 080202003518600 | 0.13 | MW | |
| 25 | 1112076 Ontario Limited | 080202003503700 | 0.06 | MW | |
| 26 | Shawn Boyce | 080202003503900 | 0.08 | MW | |
| 27 | Shawn Boyce | 080202003504000 | 0.08 | MW | |
| 28 | McKercher Bros. Ltd. (Brockville) | 080203006500705 | 0.46 | T-MD-1 | |
| 29 | Sean White | 080202004554300 | 0.46 | C2-2 | |
| 30 | 11951289 Canada Incorporated | 080202004533000 | 1.57 | C2 | |
| 31 | Imperial Oil Limited | 080203007026400 | 0.33 | C4-3 | |
| 32 | Metro Ontario Inc. | 080203007512520 | 1.40 | C3 | |

| | | | | | |
|------------------------|----------------------------------|-----------------|--------------|---------|--|
| 33 | 2746382 Ontario Inc. | 080202005116900 | 14.51 | MC | |
| 34 | Lexicon Masonry Canada Co | 080203007570000 | 2.00 | H1-C2-5 | |
| 35 | Juliada Holdings Inc. | 080202005314000 | 2.00 | H1-C1 | |
| 36 | Windent Inc. in trust | 080202005200903 | 1.57 | C2-13 | |
| Total, Acres | | | 98.41 | | |
| Total, Hectares | | | 39.82 | | |

Office/Institutional Land

| Office/Institutional Land | | | | | |
|---------------------------|--|-----------------|--------------|-------|--|
| 1 | Upper Canada District School Board (UCDSB) | 080203006005029 | 14.33 | I1 | |
| 2 | 653973 Ontario Ltd | 080202005340101 | 9.38 | H1-I1 | |
| Total Acres | | | 23.71 | | |
| Total Ha | | | 9.82 | | |