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# NIAGARA OFFICIAL PLAN

## Revised Land Needs Assessment Summary

Results subject to refinement in draft Official Plan.

Niagara Region  
August 2021

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**GROWING REGION**



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## Land Needs Assessment Overview

The Land Needs Assessment (“LNA”) is a technical, Region-led process that determines the amount of land required for each local municipality based on the Provincially-allocated overall growth to 2051.

Specifically, the Region must calculate the amount of designated land each local municipality requires to accommodate population, housing and employment forecasts provided in *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (“Growth Plan”).

The Minister of Municipal Affairs and Housing, as directed by the *Growth Plan*, released the *Land Needs Assessment Methodology for the Greater Golden Horseshoe* (the “*Methodology*”) in August 2020. The Region is required to use the *Methodology* in combination with the policies of the *Growth Plan* to determine the amount of land required to accommodate forecasted growth.

The *Methodology* is used to calculate two separate land needs, one for *Community Area* and one for the *Employment Area*.

Conducting the LNA is an iterative process and requires substantial direction and input from background strategies associated with the Niagara Official Plan (“NOP”) as well as consultation with the public, local municipalities and Province.

An earlier Draft LNA Summary was released in May 2021 for the purpose of consultation and refinement. Feedback was received from local municipalities, consultants and the public. Commentary was generally supportive; feedback was made on allocations, methodology assumptions, existing intensification potential and affordable housing.

Advancement of related to NOP strategies and Niagara 2051, a joint working group made up of the Transportation Master Plan, Water/Wastewater Master Servicing Plan and Development Charge has also occurred since the release of the May 2021 LNA.

The Revised LNA presented in this report is based on the feedback received on the May 2021 draft and updates from associated NOP strategies and Niagara 2051.

**The LNA results provided here are for the purpose of informing the Settlement Area Boundary Review and the Transportation Master Plan, Water/Wastewater Master Servicing Plan and Development Charge Background Study associated with Niagara 2051. The LNA may be further refined through the consolidated Official Plan process later this year.**

## How to Read this Report

This report follows the Provincial *Methodology* process and provides a summary for each component outlined within it. The report does not represent the final land needs assessment; that will be included as a companion to the Official Plan in 2022.

The Revised LNA is based on consultation with the Province, local municipalities, stakeholders, public and Niagara 2051 working group. Details on specific revisions and rationale are provided throughout the report.

The LNA results presented here should not change significantly over the remainder of the Official Plan program. However, advancement and/or refinement to associated Official Plan Strategies may change the output of the LNA.

The Province is the approval authority on the LNA and requires consultation be done prior to submitting the final LNA. The Province has provided feedback on the May 2021 Draft LNA and will continue to be consulted while the LNA is finalized.

The Final LNA will be submitted with the consolidated draft Official Plan for Provincial review and approval.

A **Glossary of Terms** is provided at the end of this summary to provide clarity on frequently used terms and terms from Provincial policy.

## Public Consultation and Engagement

The Municipal Comprehensive Review (now called the Niagara Official Plan) was first initiated in 2014 and has been through significant consultation and continuous evolution.

The following summary identifies milestone consultation efforts made so far which covered growth allocations and land needs assessment.

Project Phase	Date	Description
<b>Niagara 2041: Growth Options</b>	November 17, 2015	Public Information Center: Town of Grimsby
	November 18, 2015	Public Information Centre: City of Port Colborne
	November 19, 2015	Public Information Centre: City of St. Catharines
<b>Council approved Phase 1 and 2 Report (PDS 15-2016)</b>		
<b>Niagara 2041: Preferred Growth Option</b>	June 15, 2016	Public Information Centre: Town of Fort Erie
	June 16, 2016	Public Information Centre: Township of West Lincoln
	June 22, 2016	Public Information Centre: City of Welland
	November 30, 2016	Public Information Centre: City of Niagara Falls
	December 6, 2016	Public Information Centre: City of Thorold
	December 7, 2016	Public Information Centre: Town of Niagara-on-the-Lake
	December 8, 2016	Public Information Centre: Town of Lincoln

<b>Project Phase</b>	<b>Date</b>	<b>Description</b>
<b>Preferred Growth Option Forecast approved for Development Charges Study (PDS 37-2016)</b>		
<b>2017 Provincial Plan Review and Release of Growth Plan (2018)</b>		
<b>Regional Council deem Pre-2017 Growth Plan MCR complete and Growth Management work transitioned into new Niagara Official Plan (PDS 21-2018)</b>		
<b>Niagara Official Plan: Employment Strategy</b>	October 10, 2019	Industry Stakeholder Session: Town of Niagara-on-the-Lake
<b>Niagara Official Plan: Growth Strategy</b>	November 6, 2019	Public Information Centre: City of Thorold
	November 7, 2019	Public Information Centre: City of Niagara Falls
	November 13, 2019	Public Information Centre: Town of Grimsby
	November 14, 2019	Public Information Centre: Town of Fort Erie
<b>Niagara Official Plan: Employment Strategy</b>	February 25, 2020	Industry Stakeholder Session: Town of Niagara-on-the-Lake
<b>Release of Growth Plan (2020) and Revised Land Needs Assessment Methodology</b>		
<b>Settlement Area Boundary Review Program: Growth Plan Forecasts and Land Needs Assessment Update presented to Council (PDS 29-2020)</b>		
<b>Niagara Official Plan: Growth Management and Employment Surveys</b>	September – October, 2020	Online surveys related to Growth Management and Employment directions and options
<b>Niagara Official Plan: Land Needs, Growth Allocations and Settlement Area Boundary Adjustment</b>	October 7, 2020	Virtual Public Information Centre

<b>Project Phase</b>	<b>Date</b>	<b>Description</b>
<b>Niagara Official Plan: Employment Strategy</b>	October 8, 2020	Virtual Public Information Centre
<b>Niagara Official Plan Consolidated Policy Report (PDS 17-2021). Appendix 1 to Report PDS 17-2021 provides a detailed list of all Official Plan consultation efforts.</b>		
<b>Niagara Official Plan: Growing Region</b>	June 9, 2021	Virtual Public Information Centre
<b>Niagara Official Plan: Vibrant Region</b>	June 10, 2021	Virtual Public Information Centre
<b>Niagara Official Plan: Competitive Region</b>	June 16, 2021	Virtual Public Information Centre
<b>Niagara Official Plan: Connected Region</b>	June 17, 2021	Virtual Public Information Centre
<b>Niagara Official Plan: Sustainable Region</b>	June 23, 2021	Virtual Public Information Centre
<b>Feedback on Niagara Official Plan Consolidated Report, and associated materials, was requested by July 2, 2021</b>		

## Summary of Updates since the Draft May 2021 Land Needs Assessment

On May 20, 2021, Regional Council received PDS 17-2021, Niagara Official Plan Consolidated Policy Report. The report provided a comprehensive update on the NOP process and draft materials for consultation with local municipalities, stakeholders and public.

Staff asked for feedback by July 2, 2021, so it could be considered as part of this report, among other things. Feedback has been carefully considered and is described later in this report.

The May 2021 report provided a Draft LNA, based on a Regional forecast of 674,000 people and 272,000 jobs throughout Niagara's 12 municipalities. Forecasts were distributed based on the Preferred Growth Option, established through Niagara 2041 (Niagara 2041: Preferred Growth Option (Hemson, 2019)), with revisions made based on the extended planning horizon and emerging development trends. Municipal specific forecasts, housing mix and employment mix were all extended to 2051 and provided in PDS 17-2021 Appendix 3, Growth Allocation Update to 2051 prepared by Hemson ("*2051 Growth Update Memo*", 2021). Updated forecasts and assessment were based on the 2020 Growth Plan and associated Provincial LNA Methodology (the "*Methodology*").

The May 2021 Forecasts provided information to address housing mix within each municipality, as well as areas within them (Delineated Built-up Area, Designated Greenfield Area and Rural Area). This was done as a component of 2020 Provincial LNA Methodology and meant to show how the forecasts are representing market-based demand for housing and support affordable housing.

The Region retained a consultant to review core housing needs, which is driven primarily by affordability in Niagara. This was reported in PDS 17-2021 Appendix 5.2, Niagara Region Housing Affordability and Growth Plan 2051 (CANCEA, 2021). CANCEA concluded that achieving the *minimum* Growth Plan forecast would keep the Region's core housing need at 13%. More growth – particularly more medium and higher density housing – is needed to better address core housing need (i.e. affordability).

Before and after the May Joint Report release, the Region met individually with planning staff at each local municipality to discuss growth forecasts, among other things. The Region also held five public meetings and dozens of meetings with



interested parties about its forecasts, land needs, and boundary matters. The need to address housing affordability was raised consistently in these meetings.

Additionally, the Region has progressed on the Transportation Master Plan (“TMP”), the Water and Wastewater Master Plan (“WMP”) and its Development Charge Background Study and By-law update (“DCS”). This process is collectively called “Niagara 2051”. It involves a working group of staff across many departments and public consultation events held in the spring 2021. More is planned in 2021 and 2022.

Since the release of the May 2021 forecasts, the Region carefully considered individual feedback received. Staff also conducted a further review of individual growth areas and existing and proposed development applications. Additional progress on the background work to the Natural Environment System has been made since May 2021.

On this basis, Staff identified two categories of change that have modified the LNA from what was presented in May 2021. The first is that additional population and intensification growth be planned for Lincoln and Welland. The second is that adjustments be made to better integrate the Natural Environment Option 3B/3C in to the growth forecasts.

The Growth Plan (2020) allows Niagara to use alternative growth forecasts beyond those identified in Growth Plan Schedule 3. The forecasts provided here are referenced as the “Made-in-Niagara Forecast” since they represent an alternative growth forecast that works better for the Region.

Through the comments received, and additional analysis done by the Region, Staff determined that the draft May 2021 Forecasts for the Lincoln and Welland were likely to be achieved earlier than set out in the 2051 planning period. Higher forecasts are required to ensure alignment with infrastructure investment and to achieve market based demand.

In both Lincoln and Welland, the areas identified for development (beyond the preliminary forecast) are within existing urban, built up areas with development and redevelopment potential. These locations are considered intensification opportunities and will support a broader, more affordable housing mix through this development/redevelopment.

As a result of the increased population forecasts in these municipalities, and the Region overall, these municipalities will achieve a higher intensification rate. In

other words, more development is proposed within the existing boundaries. There is no impact to Community Area (residential/mixed use) land need from this adjustment.

The Made-in-Niagara Forecast and increased intensification rates do not result in additional land through boundary expansions.

The proposed additional intensification for Lincoln and Welland is important to reflect the planned infrastructure to sustain the growth. The Region seeks to proactively plan to accommodate growth and to ensure communities are more sustainable, better connected, healthy and safe. The addition will also better address core housing needs identified by CANCEA.

Recently, at the May 20, 2021 Regional Council meeting, Council directed Staff to prepare policies and mapping for both Natural Environment System (NES) Option 3B and 3C, with a decision on the preferred NES Option to be made at a later time. The finalization of criteria and methodology has begun, and policies and mapping is under way, with reporting later this year. Consultation with the local municipalities on mapping and policy development is ongoing.

Since May 2021, the Region has refined the analysis of developable area based on the NES Options. The most current information for Options 3B and 3C identified a need to remove non-developable lands from the land needs assessment calculation.

In other words, more land should be protected than identified in the May 2021 Forecast; in turn, less land is available for development.

This results in a greater *overall need* for land (since less is available for development). This means a small increase of land is needed for the Community Area (i.e. residential and mixed use) and a modest increase in land needed for Employment Areas (i.e. mostly industrial areas).

Through consultation with the Province, the Region has also been advised that the LNA should result in a single number for land need; a blended number where Community Area land need and Employment Area land need are combined.

In the May 2021 LNA, the Region's net overall land need was 440 hectares. From the above-noted changes, the Region's current overall net land need is 705 hectares.

Additional context and information is provided throughout this document, with particular focus on those component that were revised from the May 2021 LNA.

## Community Area Land Needs Assessment

*Community Area* is defined as the Urban Area, minus *Employment Areas*, and is made up of both the *Delineated Built-Up Area* (as defined and mapped by the Province in 2006) and the Designated Greenfield Area (DGA).

The *Community Area* part of the Land Needs Assessment seeks to quantify the amount (in hectares) of DGA lands that is needed to accommodate the required growth forecasts to 2051.

The *Community Area* Land Needs Assessment is comprised of six components. Below is a discussion of those components and the results.

### Component 1: Population Forecasts

The starting point is the population projection by age group for the Region. This comes from *Growth Plan* Schedule 3, which provides a *minimum* forecast 2051 population of 674,000 for Niagara Region.

Through the work described above, the Region is advancing an alternative growth forecast, referred to as the “Made-in-Niagara Forecast”. This better reflects the growth potential in Niagara’s communities and current work on the NES.

**For the reasons set out in this report, the Made-in-Niagara Forecast uses a population of 694,000.**

### Component 2: Housing Need

The Region has done significant forecasting work, over several years, and based on input from many stakeholders. Most recently, its forecasting work was set out in Report, PDS 17-2021 Appendix 3, Growth Allocation Update to 2051 prepared by Hemson (“*2051 Growth Update Memo*”, 2021).

The *Methodology* requires population to be converted into housing units based on household formation rates. Household formation rates are based on the likelihood or tendency of age groups to live in households.

Niagara’s household formation rates are anticipated to increase between 2016 (the base Census year) and 2051. A contributing factor is Niagara’s aging demographic,

which will continue to grow to 2051, with a significant increase in households maintained by people 75 years of age and older.

The 2051 housing forecast has been updated to reflect the Made-in-Niagara Forecast, based on the assumptions and age cohorts identified in the *2051 Growth Update Memo*.

**Table 1** identifies a need for **296,750 households** based on the 2051 population forecast of 694,000.

Table 1: 2016 and 2051 Occupied Households by Age of Household Maintainer

Age	Headship Rate	Occupied Households		2016-2051 Growth	2016-2051 Growth %
		2016	2051		
15 - 19	1.7%	430	566	136	31.7%
20 - 24	14.5%	4,000	5,066	1,066	26.6%
25 - 29	35.2%	8,640	12,768	4,128	47.8%
30 - 34	48.7%	11,435	17,566	6,131	53.6%
35 - 39	52.9%	12,385	19,461	7,076	57.1%
40 - 44	54.1%	13,825	20,130	6,305	45.6%
45 - 49	57.4%	16,365	22,220	5,855	35.8%
50 - 54	57.7%	19,920	24,897	4,977	25.0%
55 - 59	58.6%	20,050	25,948	5,898	29.4%
60 - 64	58.9%	18,845	25,093	6,248	33.2%
65 - 69	61.2%	18,015	25,711	7,696	42.7%
70 - 74	61.7%	13,675	24,331	10,656	77.9%
75 - 79	65.3%	10,480	24,207	13,727	131.0%
80 - 84	66.5%	8,190	21,747	13,557	165.5%
84 - 89	60.7%	5,185	15,991	10,806	208.4%
90 +	46.3%	2,390	11,048	8,658	362.3%
Total	48.2% (2016)	183,830	296,750	112,920	61.4%
	50.8% (2051)				

The forecast population age structure and household formation information is further used to determine households by housing type. The *Methodology* requires housing forecast by four housing types; single/semi-detached, row houses, accessory dwelling and apartment.

As referenced in the *2051 Growth Update Memo*, the starting point for household forecast by housing type was a market-based demand. Market-based demand is a key consideration within the LNA process and, along with housing affordability, is one of the main drivers in establishing housing mix and land need requirements.

The Made-in-Niagara Forecast is driven by an increase of medium and high density housing within existing urban areas. The resulting housing mix, compared to the mix presented in *2051 Growth Update Memo*, is slightly lower for single and semi-detached homes and greater for other housing types. However, there is an overall increase in all housing unit types and is based predominantly on recent development application trends and inquires. Therefore, while the housing mix has changed slightly, it remains reflective of market demand, supports additional intensification, and better aligns with recommendations from CANCEA regarding affordability and core housing need.

**Table 2** provides a summary of household forecast by housing type between 2021 and 2051.

Table 1: Household Forecast by Housing Type - 2021 to 2051

<b>Household Forecast by Housing Type: 2021 to 2051</b>					
<b>Niagara Region</b>	<b>Single/Semi-Detached</b>	<b>Row House</b>	<b>Accessory Dwelling</b>	<b>Apartment Building</b>	<b>Total</b>
<b>Units</b>	44,318	27,404	3,390	27,653	102,765
<b>Share</b>	43%	27%	3%	27%	100%

### **Component 3: Allocation of Housing Need to Local Municipalities**

Allocation of Housing Need to local municipalities is based on input from local municipalities and public and private stakeholders.

Draft allocation covering the period between 2016 and 2041 was completed through Niagara 2041 (see PDS 37-2016) and formed the basis for completion of the pre-2017 Municipal Comprehensive Review (see PDS 21-2018).

Municipal allocations were revised and extended to the 2051 planning horizon through the *2051 Growth Update Memo*, based on the need to reflect market demand for housing and informed by associated Official Plan strategies, including Watershed, Housing and Employment Strategies.

After release of the May 2021 Forecasts, consultation and collaboration continued with local municipalities, internal Niagara 2051 working group and the public.. Through this work, it was identified that municipal allocations of population growth to the Town of Lincoln and City of Welland were not reflective of growth expectations and anticipated 2051 infrastructure demand.

On this basis, staff increased the population forecast to 694,000 people – an increase of 10,000 to each of Lincoln and Welland. The increase of 20,000 population results in an additional 9,000 housing units to 2051.

All housing units are located within the existing built boundary, support intensification and contribute to the mix of housing needed to improve housing affordability.

### **Housing Affordability**

The Housing Report (CANCEA, 2021) provided in PDS 17-2021 (Appendix 5.2), sets out that the Region's core housing need (including, affordability) will get worse if we continue growth at the existing level. Achieving the minimum forecasts set out the *Growth Plan* will keep the core housing need level at about 13%. To reduce core housing need, even more housing is needed.

Importantly, core housing need can be addressed by providing a greater share of higher density housing types. Row/townhouse and apartment units have a lower average number of people per unit compared to single and semi-detached units. Therefore, increasing the supply of higher density units leads to more housing options and reduced core housing need.

The Made-in-Niagara Forecast supports higher population growth and an increased amount of medium and high density housing. Therefore, this forecast will better address core housing need.

The LNA considers a market-based housing mix and its relationship to the planned housing mix. This is a requirement of the *Methodology*. A market-based approach is useful to identify an appropriate variety of housing units to be built to meet the needs of Niagara's population.

The Greenbelt specialty crop designation, present in northern Niagara municipalities, prohibits expansion of Settlement Areas boundaries. In the communities of Grimsby, Lincoln, St. Catharines and Niagara-on-the-Lake, growth is proposed within existing Settlement Areas through intensification of the Built-Up Area – requiring a greater proportion of higher density housing types.

Municipalities outside of the *Greenbelt Plan* area have a relatively lower intensification rate and, therefore, a higher proportion of lower density housing types. The balance between these two geographies is important for supporting market-based demand for housing and protection of specialty crop lands within the Greenbelt Plan area.

**Table 3** provides municipal-level housing allocations by housing type.

Table 3: Housing Unit Growth by Type and Municipality, 2021 to 2051

<b>Housing Unit Growth by Type and Municipality, 2021 to 2051</b>				
<b>Municipality</b>	<b>Single/Semi</b>	<b>Row</b>	<b>Apartment</b>	<b>Total</b>
Fort Erie	4,060	2,700	600	7,360
Grimsby	130	1,340	3,120	4,590
Lincoln	1,590	2,530	5,695	9,815
Niagara Falls	11,980	5,090	3,140	20,210
Niagara-on-the-Lake	3,060	915	630	4,600
Pelham	2,380	1,070	680	4,130
Port Colborne	1,690	430	180	2,300
St. Catharines	3,040	4,500	12,230	19,770
Thorold	3,900	2,390	160	6,450
Wainfleet	450	0	10	460
Welland	6,010	4,050	4,290	13,930
West Lincoln	6,030	2,390	310	8,730
<b>Niagara Region</b>	<b>44,320</b>	<b>27,405</b>	<b>31,040</b>	<b>102,765</b>

#### **Component 4: Housing Supply Potential by Policy Area**

The *Methodology* requires municipalities to plan for growth within three policy areas:

1. Delineated Built-Up Area
2. Designated Greenfield Area
3. Rural Area

Development within the *delineated built-up area* is referred to as Intensification. The *delineated built-up area* was established by the Province in 2008 and was further refined through Niagara 2031, the Region’s Growth Management Strategy that implemented the policies of the 2006 Growth Plan.

The *Growth Plan* requires 50% of future household growth in Niagara to be directed to the *delineated built-up area*. This is an increase from 40% in the Region’s current Official Plan, which was the intensification target in the 2006 Growth Plan.

The Region seeks to exceed this requirement. The analysis conducted through the Regional Structure Strategy (PDS 17-2021 Appendix 4.2) identified a Regional Intensification Rate of 56%.

Recent work – based on public consultation and the Niagara 2051 servicing review – suggests Niagara can have an even higher intensification rate. As previously noted, the additional population for Lincoln and Welland is entirely planned within the delineated built-up area. No changes are needed to Strategic Growth Areas (SGA) or settlement boundaries from what was set out in the Regional Structure Strategy, as identified in PDS 17-2021, Appendix 4.2.

**The outcome of this recent work reflects an intensification target of 60%.**

This target is well above the minimum 50% target identified in the *Growth Plan*.

The *Designated Greenfield Area* (“DGA”) is the remainder of the designated urban area outside of the *delineated built-up area*.

The *Growth Plan* sets out that the Region must plan for a minimum density target of 50 people and jobs per hectare within the DGA. This target is incorporated in the LNA.

The Rural Area is considered all areas outside of Urban Settlement Areas, and includes the Agricultural System and Rural Settlements (Hamlets). Rural housing need will be addressed in the final Land Needs Assessment. The Rural Land Needs Assessment is discussed in detail later in this report.

Housing forecasts by municipality, within the three policy areas, is based on an assessment of intensification opportunities, including SGA’s, and development potential within the DGA. Intensification rates, established through the Regional Structure, are based on a combination of consultation with local municipalities and an assessment of the capacity for growth within the *delineated built-up area*.

**Table 4** provides household forecast by policy area for each municipality and identifies the overall intensification rate of 60%.



Table 4: Housing Forecast by Policy Area and Municipality, 2021 to 2051

Shares of Household Growth by Policy Area Niagara Region by Local Municipality, 2021-2051				
Municipality	Built Up Area	DGA	Rural	Total
Fort Erie	50%	49.5%	0.5%	100%
Grimsby	98%	2.5%	0.5%	100%
Lincoln	90%	9.5%	0.5%	100%
Niagara Falls	50%	49.5%	0.5%	100%
Niagara-on-the-Lake	25%	74.5%	0.5%	100%
Pelham	25%	74.5%	0.5%	100%
Port Colborne	30%	69.6%	0.5%	100%
St. Catharines	95%	4.5%	0.5%	100%
Thorold	25%	74.5%	0.5%	100%
Wainfleet	0%	0%	100.0%	100%
Welland	75%	24.5%	0.5%	100%
West Lincoln	13%	86.5%	0.5%	100%
<b>Niagara Region</b>	<b>60%</b>	<b>39%</b>	<b>1%</b>	<b>100.0%</b>

As with Component 3, the *Methodology* requires housing forecasts within each of the policy areas to be broken out into housing type. The distribution of housing type within each policy area must be based on an achievable housing mix and consider market-demand.

Within the *delineated built-up area*, the housing mix is predominately higher density forms of housing including row and apartment housing. In contrast, the housing forecast within the DGA and Rural area is predominately ground-related, with 73% of units anticipated to be single or semi-detached.

**Table 5** and **Table 6** provide housing unit forecasts by municipality within the *delineated built-up area* and DGA.

The Township of Wainfleet is excluded from both tables as Wainfleet does not have an Urban Settlement Area and all forecast housing growth will occur within the *Rural Area*, in Rural Settlements and on other agricultural lands. Additional detail is provided in the Rural Settlement Area Assessment section.

Table 2: Housing Forecast by Unit Type, Delineated Built-Up Area, 2021 to 2051

<b>Delineated Built-Up Area Housing Unit Growth, 2021 to 2051</b>				
<b>Municipality</b>	<b>Single/Semi</b>	<b>Row</b>	<b>Apartment</b>	<b>Total</b>
<b>Fort Erie</b>	1,520	1,620	540	3,680
<b>Grimsby</b>	110	1,330	3,060	4,500
<b>Lincoln</b>	1,430	1,920	5,545	8,895
<b>Niagara Falls</b>	4,220	3,050	2,830	10,100
<b>Niagara-on-the-Lake</b>	238	350	563	1,150
<b>Pelham</b>	350	500	180	1,030
<b>Port Colborne</b>	400	130	160	690
<b>St. Catharines</b>	2,480	4,370	11,930	18,780
<b>Thorold</b>	580	890	140	1,610
<b>Welland</b>	2,920	3,330	4,190	10,440
<b>West Lincoln</b>	760	120	250	1,130
<b>Niagara Region</b>	<b>15,008</b>	<b>17,610</b>	<b>29,388</b>	<b>62,005</b>

Table 3: Housing Forecast by Unit Type, DGA, 2021 to 2051

<b>Designated Greenfield Area Housing Unit Growth, 2021 to 2051</b>				
<b>Municipality</b>	<b>Single/Semi</b>	<b>Row</b>	<b>Apartment</b>	<b>Total</b>
<b>Fort Erie</b>	2,500	1,080	60	3,640
<b>Grimsby</b>	0	10	60	70
<b>Lincoln</b>	140	610	150	900
<b>Niagara Falls</b>	7,660	2,040	310	10,010
<b>Niagara-on-the-Lake</b>	2,800	564	66	3,430
<b>Pelham</b>	2,010	570	500	3,080
<b>Port Colborne</b>	1,280	300	20	1,600
<b>St. Catharines</b>	460	130	300	890
<b>Thorold</b>	3,290	1,500	20	4,810
<b>Welland</b>	2,630	720	100	3,450
<b>West Lincoln</b>	5,230	2,270	60	7,560
<b>Niagara Region</b>	<b>28,000</b>	<b>9,794</b>	<b>1,646</b>	<b>39,440</b>

**Component 5: Community Area Jobs**

The *Methodology* requires *Community Area* jobs be allocated within the DGA portion of the *Community Area* to calculate the total number of residents and jobs occurring within it.

*Community Area* jobs are predominately within the Major Office and Population-Related Employment categories. For the purposes of the *Community Area* assessment, *Community Area* jobs are further distinguished between the *delineated built-up area* and *designated greenfield area*.

*Community Area* jobs were calculated based on existing development proposals, land use permissions, and factoring in Work At Home employment.

### Work At Home

Work at Home employment is incorporated into the Land Needs Assessment impacts *Community* and *Employment Area* Land needs.

Since the onset of the Covid-19 pandemic to the time of preparing this LNA Summary, many jobs have shifted to a Work at Home setting, although the Region does not have specific data quantifying such a shift.

At the time of writing, the Region and other experts are unsure the long-term impacts for Work at Home. For the preparation of the LNA, this is an important consideration for how Work at Home may impact the calculation of different Employment Types.

In Niagara, the majority of *Employment Areas* are considered Core and Dynamic (as defined in the Employment Strategy, **Appendix 10.2**). Jobs within these areas are largely categorized as Employment Land Employment and occur onsite. Therefore, moving Employment Land Employment jobs out of *Employment Areas* would result in an erroneous reduction in *Employment Area* land requirements.

Alternatively, Major Office and Population-Related Employment jobs are those that are most likely to be Work at Home. In other words, those are the types of jobs that may see long-term Work from Home changes. That type of job is predominantly located within the *Community Area*.

The approach taken in the LNA is to maintain similar Work at Home rates, generally consistent with pre-Covid-19 pandemic conditions. This ensures the greatest flexibility within *Employment Areas* and maintains a sufficient supply of lands in the event there is not a significant long-term shift to Work at Home.

In this way, the Region is being conservative in its LNA. Work from Home trends will be carefully monitored and, if warranted, future Official Plan changes will be advanced to address those trends.

**Table 7** provides an estimated number of jobs within the DGA portion of the Community Area for each urban municipality.

Table 4: DGA Community Area Job Forecast, 2021 to 2051

<b>DGA Community Area Job Forecast, 2021-2051</b>	
<b>Municipality</b>	<b>Total</b>
<b>Fort Erie</b>	247
<b>Grimsby</b>	5
<b>Lincoln</b>	744
<b>Niagara Falls</b>	1,065
<b>Niagara-on-the-Lake</b>	1,091
<b>Pelham</b>	559
<b>Port Colborne</b>	362
<b>St. Catharines</b>	1,555
<b>Thorold</b>	532
<b>Welland</b>	266
<b>West Lincoln</b>	1,998
<b>Niagara Region</b>	<b>8,424</b>

### **Component 6: Need for Additional Land**

The final component of the *Community Area* LNA brings together the forecast housing units and employment within the DGA to establish an overall land need based on achieving the minimum density target of 50 people and jobs per hectare.

To determine land need, the forecast housing units in **Table 6** are compared to the planned units (units that are within either a draft or registered Plan of Subdivision) within each municipality. The surplus, or shortfall, of units is converted into residents based on the Persons Per Unit rate<sup>1</sup> for each unit type.

<sup>1</sup> The Person Per Unit (PPU) rate is based on the 2017 Niagara Region Development Charges Background Study. This Study provides a PPU of 2.91 for single/semi-detached, 2.12 for row and 1.62 for apartment. PPU rates may be revised based on forthcoming Development Charges Study work undertaken later in 2021.

Finally, DGA Community Area job forecasts in **Table 7** are added to establish an overall people and jobs target for the DGA.

The overall population and employment target is converted to a land need in hectares based on the minimum density target of 50 people and jobs per hectare.<sup>2</sup>

**Table 8** provides the *Community Area* Land Needs Assessment results.

Table 5: Overall Community Area Land Need, 2021 to 2051

<b>DGA Community Area Land Need, 2021-2051</b>				
<b>Municipality</b>	<b>Population and Employment Growth within the Unplanned DGA</b>	<b>Area Required (ha)</b>	<b>Area Designated<sup>3</sup> (ha)</b>	<b>Additional Land Need (ha)*</b>
<b>Fort Erie</b>	8,170	165	60	105
<b>Grimsby</b>	120	5	0	5
<b>Lincoln</b>	2,410	25	25	0
<b>Niagara Falls</b>	23,470	470	195	270
<b>Niagara-on-the-Lake</b>	9,935	80	75	5
<b>Pelham</b>	3,215	65	25	40
<b>Port Colborne</b>	4,615	90	250	(160)
<b>St. Catharines</b>	3,655	75	60	15
<b>Thorold</b>	4,830	95	250	(155)
<b>Welland</b>	5,770	115	115	0
<b>West Lincoln</b>	20,545	410	40	370
<b>Niagara Region</b>	<b>86,735</b>	<b>1,590</b>	<b>1,095</b>	<b>495</b>

Note: Above numbers have been rounded to the nearest 5.

<sup>2</sup> The density target of 50 people and jobs per hectare excludes Lincoln, which has a vacant DGA target of 100 people and jobs per hectare due to the land use permissions within the Major Transit Station Area and Niagara-on-the-Lake, which has a target of 125 people and jobs per hectare relating to the Glendale District Plan.

<sup>3</sup> The Area Designated is the gross developable land, within the Designated Greenfield Area, free of non-developable features identified within the *Growth Plan*. The Natural Environment System (NES) area removed is based on draft analysis associated with NES Option 3B/3C as of July 2021.

## Community Area Land Needs Summary

Niagara's 12 local municipalities can be placed into two general categories as it pertains to the Made-in-Niagara Forecast results for Community Area:

### 1. Additional Community Area Land Required

The Town of Fort Erie, City of Niagara Falls and Township of West Lincoln needs more community area land to accommodate the 2051 forecast. The Town of Pelham has a small need for community area land.

### 2. No Additional Community Area Land Required

The Town of Grimsby, Town of Lincoln, Town of Niagara-on-the-Lake, City of St. Catharines, and City of Welland generally have a sufficient supply of designated lands to accommodate the 2051 forecast.

The City of Thorold and City of Port Colborne have a surplus of designated lands to 2051.

## Additional Considerations and Revisions

The *Methodology* allows for final adjustments to be made to *Community Area Land Needs*, including a minor increase to land in the event of any expansions, to create a logical boundary.

The *Methodology* also allows for refinements based on constrained lands due to infrastructure and servicing. Determining servicing constraints will be important in assessing lands that may be considered constrained, rather than surplus.

Finally, revisions to associated strategies will require updates to the Land Needs Assessment. Work on the Natural Environmental System (NES) is ongoing and draft mapping and policies will be released in Fall 2021. Updates to the NES may require minor adjustments to the LNA.

If an *Employment Area* boundary is changed, it will directly impact the *Community Area* land need. If the *Employment Area* is within the BUA, the result may be an increase to Intensification Rate. If the *Employment Area* is within the DGA, the result would be a decrease in *Community Area* land needs.

The final Land Needs Assessment will be a combined overall number of community area and employment area. That requires endorsement by Council and will be provided to the Province for approval.

## Employment Area Land Needs Assessment

### Component 1: Employment Forecasts

Similar to the *Community Area* assessment, the starting point for determining the overall *Employment Area* land need is the employment forecast set out in *Growth Plan* Schedule 3. The *Growth Plan* requires Niagara Region to plan for a minimum employment base of **272,000 jobs** by 2051.

The *Methodology* requires the employment forecast to be allocated to local municipalities and be categorized by employment type, including Major Office, Population-Related Employment, Employment Land Employment and Rural based employment. These employment types are defined within the **Glossary of Terms** section at the end of this report.

*2051 Growth Update Memo* sets out the distribution of employment forecasts for Niagara Region.

**Table 9** provides an overview of employment growth by municipality, by employment type, from 2021 to 2051.

Table 6: Niagara Region Employment Growth, 2021 to 2051, by Employment Type

<b>Total Employment Growth by Employment Type, 2021-2051</b>					
<b>Municipality</b>	<b>Major Office</b>	<b>Population-Related Employment</b>	<b>Employment Land Employment</b>	<b>Rural Employment</b>	<b>Total Employment</b>
<b>Fort Erie</b>	140	2,890	3,430	440	6,900
<b>Grimsby</b>	380	2,070	1,130	390	3,970
<b>Lincoln</b>	100	1,580	1,390	1,500	4,570
<b>Niagara Falls</b>	1,150	15,550	2,770	850	20,320
<b>Niagara-on-the-Lake</b>	350	3,040	290	1,480	5,160
<b>Pelham</b>	10	1,600	0	710	2,320
<b>Port Colborne</b>	0	750	350	540	1,640
<b>St. Catharines</b>	4,970	10,780	2,880	590	19,220
<b>Thorold</b>	250	2,540	580	170	3,540
<b>Wainfleet</b>	0	0	0	420	420
<b>Welland</b>	360	4,610	5,300	480	10,750
<b>West Lincoln</b>	160	3,580	1,760	520	6,020
<b>Niagara Region</b>	<b>7,870</b>	<b>48,990</b>	<b>19,880</b>	<b>8,090</b>	<b>84,830</b>

Source: Hemson Consulting, Niagara Region Municipal Comprehensive Review – Growth Allocation Update to 2051

## **Component 2: Employment Allocation**

The *Methodology* requires municipalities to further refine forecasts by allocating employment to the *Community, Employment, and Rural Areas*.

Employment that is expected to occur outside of urban settlement area boundaries is allocated to the *rural area*. The *Methodology* sets out that a small share of employment land employment and population-related employment should be allocated to the *rural area*. This is particularly important in Niagara where certain local municipalities have existing industrial, manufacturing and greenhouse operations within the *rural area*.

The remaining, non-rural jobs are allocated to *Community Area and Employment Areas* within settlement areas. Within Niagara, the vast majority of population-



related employment is based within the *Community Area*; only about 5%<sup>4</sup> occurring within *Employment Areas*.

Major office growth is also predominately within the *Community Area*, Urban Growth Centre and Major Transit Station Areas. However, some major office currently exists within some *Employment Areas* and some growth is expected to occur within those areas accordingly.

Finally, the vast majority of employment land employment job growth will occur within the remaining *Employment Areas*.

**Table 10** provides a summary of employment forecasts by location.

Table 7: Employment Growth by Type and Municipality, 2021 to 2051

<b>Employment Growth by Policy Area, 2021-2051</b>			
<b>Municipality</b>	<b>Community Area</b>	<b>Employment Area</b>	<b>Rural Area</b>
<b>Fort Erie</b>	2,787	3,610	503
<b>Grimsby</b>	2,136	1,412	422
<b>Lincoln</b>	1,535	1,241	1,794
<b>Niagara Falls</b>	15,786	3,501	1,033
<b>Niagara-on-the-Lake</b>	2,250	1,397	1,513
<b>Pelham</b>	1,594	0	726
<b>Port Colborne</b>	705	384	551
<b>St. Catharines</b>	14,253	4,269	727
<b>Thorold</b>	2,005	1,311	230
<b>Wainfleet</b>	0	0	420
<b>Welland</b>	4,513	5,658	579
<b>West Lincoln</b>	3,445	2,001	573
<b>Niagara Region</b>	<b>51,009</b>	<b>24,784</b>	<b>9,072</b>

### **Component 3: Employment Area Capacity**

The *Methodology* requires employment potential within existing Employment Areas be determined.

<sup>4</sup> 5% is an average. This varies by municipality, particularly those with Knowledge and Innovation Employment Areas as they have a higher share of population-related employment compared to Core and Dynamic Employment Areas.

This is calculated based on the vacant *Employment Area* employment lands and densities identified within the Employment Strategy.

The Employment Policy Paper (PDS 17-2021, Appendix 10.2) provides a breakdown of occupied and vacant lands, as well as associated densities, for each of the 34 Employment Areas across the Region.

**Table 11** provides a summary of existing capacity within Employment Areas, by municipality.

Table 8: Existing Employment Area Potential for Additional Employment

Existing Employment Area Potential	
Municipality	Additional Employment Potential
Fort Erie	1,264
Grimsby	1,679
Lincoln	500
Niagara Falls	3,079
Niagara-on-the-Lake	3,421
Pelham	0
Port Colborne	1,538
St. Catharines	2,663
Thorold	2,128
Wainfleet	0
Welland	4,552
West Lincoln	885
<b>Niagara Region</b>	<b>21,709</b>

#### Component 4: Need for Additional Employment Area Land

The final step in determining the *Employment Area* land need is to compare the forecast growth (**Table 10**) with the job growth potential within existing *Employment Areas* (**Table 11**). The difference between the forecast and the potential is divided by the municipal level vacant *Employment Area* land density target.

The vacant density target is based on the sub-grouping of employment type determined through the Employment Policy Paper. Generally, Core Employment Areas, with traditional/heavier employment type uses, have the lowest vacant land density target. Knowledge and Innovation Employment Areas, with more major office type uses, have the highest density target. Dynamic Employment Areas can have a mix of traditional and lighter employment type uses and have densities that fall in between Core and Knowledge and Innovation.

## Employment Area Densities

Changes to any Employment Area density target within the Employment Strategy will directly impact the Existing Employment Area Potential in **Table 11** and Vacant Employment Area Density Target in **Table 12**. This will either increase or decrease the associated amount of Employment Area land required to meet 2051 forecasts.

**Table 12** provides a summary of the Employment Area Land Needs.

Table 9: Employment Area Land Need, by Municipality, 2021 to 2051

Employment Area Land Need by Municipality, 2021-2051			
Municipality	Unaccommodated Employment Growth	Vacant Employment Area Density Target (Jobs/ha)	Employment Area Land Need (ha)*
Fort Erie	2,345	15	155
Grimsby	(265)	50	(5)
Lincoln	740	45	15
Niagara Falls	420	35	10
Niagara-on-the-Lake	(2,025)	95	(20)
Pelham	0	0	0
Port Colborne	(1,155)	30	(40)
St. Catharines	1,605	50	30
Thorold	(815)	25	(35)
Wainfleet	0	0	0
Welland	1,105	25	45
West Lincoln	1,115	25	45
<b>Niagara Region</b>	<b>3,075</b>	<b>32</b>	<b>210</b>

Note: Above numbers have been rounded to the nearest 5.

### Employment Area Land Needs Summary

The result of the *Employment Area* component of the LNA suggests the Town of Fort Erie, City of Welland and Township of West Lincoln do not have sufficient supply of *Employment Area* to accommodate the forecast growth to 2051.

As noted earlier in this Summary, since May 2021, NES work identified that additional vacant lands need to be removed from the developable area calculated in the land needs assessment. This removal of land was most predominant for employment areas in certain municipalities with a greater vacant employment area land surplus. Specifically, this had the largest impact in Port Colborne and Thorold.

In the current LNA, the surplus has been reduced significantly for these municipalities.

Overall the Region has a need for 210 Hectares of Employment Area.

## Rural Land Needs Assessment

As directed by the Provincial Land Needs Assessment Methodology, an additional assessment was undertaken for Rural Settlement Areas.

Niagara has a modest population and employment base outside of urban settlement areas. Limited growth is anticipated to continue within rural areas and rural settlement areas. Between 2021 and 2051, the *2051 Growth Update Memo* forecast an additional 900 housing units and 8,090 jobs will occur within the rural area.

The Rural Settlement Area assessment determines where the forecast growth will occur within the rural areas and if additional land is required within rural settlement area boundaries (also known as Hamlets).

The Rural Land Needs Assessment has been restricted to municipalities where Rural Settlement Areas currently exist and are outside of the Greenbelt Plan Area. In other words, the analysis only considers the potential for additional Rural Settlement Area lands where supported by Provincial policies.

**Table 13** provides a summary of housing and employment forecasts within both the Rural Area and the proportion to be directed to Rural Settlement Areas. Distribution of units and employment to Rural Settlement Areas is based on historic trends and policy direction within associated Local Official Plans.

Table 13: Rural Area and Rural Settlement Area Forecasts

Rural Area and Rural Settlement Area Forecasts: 2021 to 2051				
Municipality	Rural Area Housing Forecast	Rural Area Employment Forecast	% Rural Employment to Rural Settlement Areas	% Units to Rural Settlement Areas
Fort Erie	40	500	0%	10%
Port Colborne	10	550	100%	100%
Wainfleet	420	460	50%	60%
West Lincoln	40	570	100%	50%

Consultation is ongoing with local municipalities to determine the capacity of existing Rural Settlement Areas, vacant lands and NES mapping. The above Rural Land Needs Assessment may be refined as part of that consultation and included

with the new Niagara Official Plan. It will include a summary of need within Rural Settlement Areas.

## Land Needs Assessment Results

This Land Needs Assessment provides a total amount of land required to support the Made-in-Niagara 2051 forecasts.

The Province requires the Region provide a cumulative need of Community Area and Employment Area assessments. **Niagara Region requires a cumulative need of 705 hectares of additional developable urban lands to support a minimum of 694,000 people and 274,000 jobs by 2051.**

## Conclusion

This LNA Summary provides a revised draft assessment of how *Community Area* and *Employment Area* land need is calculated.

The *Growth Plan* requires that the Province approve the Region's final LNA. The Region has been consulting with the Province on the draft LNA and will continue to communicate until a final assessment is presented to Council as part of the Niagara Official Plan in 2022.

In preparing this document, careful consideration was given to input from the public, agency and local area municipalities, as outlined above. The Region will continue to consult and make minor refinements in preparing the final LNA as part of the new Official Plan. The next round of public consultation is planned for fall 2021.

Regional staff will seek endorsement in principle of these Forecasts. After that, substantive changes are not planned. However, refinements to the overall need, or distribution between municipalities, may be required. The overall land need should generally remain. This is to ensure consistent recommendations can be advanced for settlement boundaries changes and the Niagara 2051 servicing strategies.

## Glossary of Terms

**Community Area:** Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land employment jobs. Community areas include delineated built-up areas and designated greenfield areas (Provincial Land Needs Assessment Methodology).

**Delineated Built-Up Area:** 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 in the Growth Plan (Growth Plan).

**Designated Greenfield Area:** Lands within *settlement areas* (not including *rural settlements*) but outside of *delineated built-up areas* that have been designated in an official plan for development and are required to accommodate forecasted growth to the horizon of this Plan. *Designated greenfield areas* do not include *excess lands* (Growth Plan).

**Employment Area:** Areas where most of the employment land employment jobs are (i.e. employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the employment area. Employment areas may be located in both delineated built-up areas and designated greenfield areas (Provincial Land Needs Assessment Methodology).

**Employment Land Employment:** all employment in urban industrial-type employment areas, excluding major office. As well, large retail concentrations and major institutions that lie within employment areas are excluded from the Employment Land Employment category (2020 Growth Plan).

**Excess lands:** Vacant, unbuilt but developable lands within settlement areas but outside of delineated built-up areas that have been designated in an official plan for development but are in excess of what is needed to accommodate forecasted growth to the horizon of this Plan (Growth Plan).

**Headship Rate:** The headship rate is defined as the ratio of the number of household heads or household maintainers to the population 15 years of age and older (Government of Canada).

**Intensification:** The development of a property, site or area at a higher density than currently exists through:

- a. *redevelopment*, including the reuse of *brownfield sites*;
- b. the development of vacant and/or underutilized lots within previously developed areas;
- c. infill development; and
- d. the expansion or conversion of existing buildings (PPS, 2020).

**Major Office:** Freestanding office buildings of approximately 4,000 square metres of floor space or greater, or with approximately 200 jobs or more (Growth Plan).

**Population-Related Employment:** Population-Related Employment is all employment within urban community areas, except major office, and is mainly commercial retail, institutional and urban work at home employment. Major concentrations of retail or large institutions excluded from Employment Land Employment are also part of Population-Related Employment (2051 Growth Update).

**Rural Area:** Rural Area, for the purposes of the Land Needs Assessment, refers to all lands outside of urban Settlement Area Boundaries. The Rural Area includes Rural Settlements, Prime Agricultural Lands and Rural Lands.

**Rural Employment:** all employment occurring within the rural geography with the few exceptions for major industrial uses or larger rural industrial areas. Work at home employment is typically a substantial proportion of the rural employment base (Hemson Consulting, Niagara Region Municipal Comprehensive Review – Growth Allocation Update to 2051).