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Appendix 3 - PDS 41-2021 2051 Land Needs Assessment

Niagara Region
December 2021

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 to accommodate 2051 forecasts.

Specifically, the Region must calculate the amount of designated land each area 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, area municipalities and Province.

Two earlier Draft LNA Summaries were released in May and August 2021 for the purpose of consultation and refinement. Feedback was received from area municipalities, stakeholders and the public. Commentary was generally supportive and refinements have been made to allocations and methodology assumptions to better align with municipal planning strategies.

A Made-in-Niagara Forecast was established in August 2021 that identified a 2051 population forecast of 694,000 people and 272,000 jobs. The Made-in-Niagara Forecast and associated draft LNA were endorsed-in-principle.

Since endorsement-in-principle in August 2021, some further changes are proposed to the LNA. These are detailed throughout the remainder of this document.

One area of change is the identification of 315 hectares of current urban lands that are constrained as a result of infrastructure and economic factors.

These lands are not removed from the urban area, rather, the revised LNA identifies an adjustment needed to discount the land supply available to accommodate forecasted growth.

The Regional Land Needs Assessment has determined that 830 hectares of additional developable land is required to achieve the minimum forecasts associated with the Made-in-Niagara forecast.

The Settlement Area Boundary Expansions set out in report PDS 41-2021 would fulfill all land needed. In other words, the Region would require no additional land.

How to Read this Report

This report follows the Provincial *Methodology* process and provides a summary for each component outlined within it. The report represents the final land needs assessment associated with the Niagara Official Plan.

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

The LNA results presented here are based on staff recommendations for Settlement Area Boundary Expansions. Adjustments to the LNA will be required if Regional Council endorses alternative boundaries related to Urban Settlement Areas, Rural Settlement Areas and/or Employment Areas.

The Province is the approval authority on the LNA and requires consultation be done prior to submitting the final LNA. The Province provided feedback on the May and August 2021 Draft LNA. This version will be provided to the Province for comment.

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

Consultation

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
Niagara 2041: Growth Options	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
Council approved MCR Phase 1 and 2 Report (PDS 15-2016)		
Niagara 2041: Preferred Growth Option	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

Project Phase	Date	Description
	December 8, 2016	Public Information Centre: Town of Lincoln
Preferred Growth Option Forecast approved for Development Charges Study (PDS 37-2016)		
2017 Provincial Plan Review and Release of Growth Plan (2018)		
Regional Council deem Pre-2017 Growth Plan MCR complete and Growth Management work transitioned into new Niagara Official Plan (PDS 21-2018)		
Niagara Official Plan: Employment Strategy	October 10, 2019	Industry Stakeholder Session: Town of Niagara- on-the-Lake
Niagara Official Plan: Growth Strategy	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
Niagara Official Plan: Employment Strategy	February 25, 2020	Industry Stakeholder Session: Town of Niagara- on-the-Lake
Release of Growth Plan (2020) and Revised Land Needs Assessment Methodology		
Settlement Area Boundary Review Program: Growth Plan Forecasts and Land Needs Assessment Update presented to Council (PDS 29-2020)		
Niagara Official Plan: Growth Management and Employment Surveys	September – October, 2020	Online surveys related to Growth Management and

Project Phase	Date	Description
		Employment directions and options
Niagara Official Plan: Land Needs, Growth Allocations and Settlement Area Boundary Adjustment	October 7, 2020	Virtual Public Information Centre
Niagara Official Plan: Employment Strategy	October 8, 2020	Virtual Public Information Centre
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.		
Niagara Official Plan: Growing Region	June 9, 2021	Virtual Public Information Centre
Niagara Official Plan: Vibrant Region	June 10, 2021	Virtual Public Information Centre
Niagara Official Plan: Competitive Region	June 16, 2021	Virtual Public Information Centre
Niagara Official Plan: Connected Region	June 17, 2021	Virtual Public Information Centre
Niagara Official Plan: Sustainable Region	June 23, 2021	Virtual Public Information Centre
Land Needs Assessment Feedback and Settlement Area Boundary Request Deadline	July 2, 2021	Online Submissions
Made-in-Niagara Forecast and August draft LNA was endorsed-in-principle (PDS 33-2021)		

Project Phase	Date	Description
Niagara Official Plan: Settlement Area Boundary Review Mapping Tool	August – October, 2021	Online Mapping Tool
Employment Conversions, within Employment Areas, were not supported by Council (PDS 39-2021)		

Evolution of the Land Needs Assessment

The first draft of the LNA, released in May 2021, was based on the Growth Plan 2051 forecast of 674,000 people and 272,000 jobs for Niagara Region.

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 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”).

Initial 2051 forecasts were consulted on with area municipalities, stakeholders and the public. Additional analysis was conducted by the Niagara 2051 working group, a Regional interdepartmental group supporting the Water and Wastewater Master Servicing Plan, Transportation Master Plan and Development Charges Bylaw.

Based on the consultation and Niagara 2051 review, it was determined that an alternative 2051 growth forecast was needed for Niagara. The Growth Plan (2020) allows Niagara to use an alternative growth forecast beyond those identified in Growth Plan Schedule 3.

It was determined that, in both Lincoln and Welland, population forecasts needed to increase by 10,000 people to reflect planned development and support infrastructure improvement. The additional growth was identified within existing urban, built up areas with development and redevelopment potential.

The Made-in-Niagara Forecast was endorsed, in principle, in August 2021 and establishes an alternative growth target of 694,000 people and 272,000 jobs for 2051.

PDS 33-2021 noted adjustments to the forecasts were likely, prior to finalizing, to reflect any recommended employment conversions and other matters, included adjustments that are identified within the Provincial Land Needs Assessment Methodology.

The following section discusses refinements to the Made-in-Niagara forecasts and draft LNA.

Refinement of Allocations Resulting from Greenbelt Restrictions

The August 2021 LNA identified the need for additional Community and Employment Area lands in several Greenbelt Plan municipalities, where expansion is prohibited.

As a result, employment forecasts have been reallocated, in a minor way, to remove the need for new settlement area lands in the Greenbelt Plan Area. Employment has been shifted to municipalities where employment growth can be supported through existing infrastructure or part of larger expansion areas.

Employment has been shifted from St. Catharines and Lincoln and redistributed to Fort Erie, Grimsby, Niagara-on-the-Lake and Thorold. The overall Regional mix of employment growth by type (Office/Major Office, Employment Land Employment, Population Related Employment and Rural Employment) remains unchanged.

Both St. Catharines and Niagara-on-the-Lake had an identified need of minor Community Area expansions in the draft assessment. This growth, however, can be accommodated within existing Designated Greenfield Areas without the need for reallocation of population and housing forecasts.

Table 1 provides a summary of revised 2051 population, housing and employment forecasts.

Table 1: 2051 Municipal Population, Housing and Employment Forecasts

Municipality	2051 Population Forecast	2051 Households Forecast	2051 Employment Forecast
Fort Erie	48,050	21,510	18,430
Grimsby	37,000	16,070	14,960
Lincoln	45,660	19,405	15,220
Niagara Falls	141,650	58,740	58,110
Niagara-on-the-Lake	28,900	12,500	17,610
Pelham	28,830	11,280	7,140
Port Colborne	23,230	10,500	7,550
St. Catharines	171,890	78,320	79,350
Thorold	39,690	15,660	12,510
Wainfleet	7,730	3,040	1,830
Welland	83,000	37,540	28,790
West Lincoln	38,370	14,060	10,480
Niagara Region	694,000	298,645	272,000

Community and Employment Area Density Assumptions

Based on consultation with municipalities and stakeholders, minor refinements have been made to density assumptions within both the Community and Employment Area calculations of the LNA.

Regarding Community Area, the Region has an existing policy for Designated Greenfield Area (DGA) to be planned at a density of 50 people and jobs per hectare. This target is measured across the entirety of the Region's DGA. The Regional Structure Strategy has determined 50 people and jobs per hectare remains an appropriate target in the Niagara Official Plan.

While the overall target remains 50 people and jobs per hectare across Niagara, the Provincial Land Needs Assessment Methodology requires an analysis of planned DGA lands be considered through the Community Area analysis.

As a result, the Community Area assessment has been refined to reflect the planned density of vacant and future DGA lands within each municipality.

Table 2 provides an overview of municipal DGA density assumptions for the purpose of the LNA.

Table 2: Municipal Designated Greenfield Density Targets to 2051

Municipality	Municipal DGA Density Target (People and Jobs Per Hectare)	Planned DGA Density on Vacant Lands (People and Jobs Per Hectare)
Fort Erie	50	50
Grimsby	50	50
Lincoln	50	100
Niagara Falls	50	50
Niagara-on-the-Lake	50	125
Pelham	50	50
Port Colborne	50	50
St. Catharines	50	60
Thorold	50	50
Welland	50	50
West Lincoln	50	55
Niagara Region	50	50

The Town of Fort Erie had an increase in Employment Area density relating to the increase in Employment Land Employment jobs that could not be supported within Greenbelt Plan Municipalities.

The Town of Niagara-on-the-Lake Employment Area density target was lowered to account for additional Employment Land Employment jobs within the Glendale Employment Area, which had previously been targeted for a higher share of office-style employment.

The Employment Area density in the City of Niagara Falls and Township of West Lincoln was lowered after consultation with those municipalities and based on work related to the Niagara Falls Employment Strategy and the Smithville Master Community Plan, respectively.

Table 3 provides an overview of Employment Area density target revisions between the draft and final LNA.

Table 3: Employment Area Density Targets to 2051

Municipality	August Draft Vacant Employment Area Density (Jobs Per Hectare)	Revised Vacant Employment Area Density (Jobs Per Hectare)
Fort Erie	15	20
Grimsby	50	50
Lincoln	45	45
Niagara Falls	35	25
Niagara-on-the-Lake	95	80
Pelham	0	0
Port Colborne	30	30
St. Catharines	50	50
Thorold	25	25
Welland	25	25
West Lincoln	25	20
Niagara Region	32	30

Employment Area Boundaries

Similar to Employment Area densities, Employment Areas in the City of Niagara Falls and Township of West Lincoln have been refined based on input from municipal planning strategies.

The Niagara Falls Employment Strategy identified a larger Employment Area boundary for the Montrose Road Industrial Area. The updated boundary is based on the re-designation of adjacent lands to the previously identified Employment Area (PDS 17-2021, Appendix 10.2, page 106). The adjacent lands are to be re-designated from Tourist Commercial to Employment and brought into the Employment Area. The additional area is 40 hectares of developable lands.

As a result, there is no longer a land need for additional Employment Area lands in Niagara Falls, as previously identified in the August 2021 draft LNA before the above-noted employment area was adjusted.

By adding additional Employment Area in Niagara Falls, Community Area lands have been reduced by 40 hectares. Thus, an additional 40 ha of Community Area are needed. This is added to the previously-identified need of 270 Ha, for a total of 310 Ha.

In West Lincoln, the Smithville Community Master Plan identified a preferred Employment Area boundary.

The recommended boundary includes the removal of a 5 ha parcel that was previously included in error.

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* 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, as identified in the following section of the report.

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.

The Growth Plan (2020) allows Niagara to use alternative growth forecasts beyond those identified in *Growth Plan* Schedule 3. An alternative growth forecast can only be advanced by a Region or single-tier government.

The Region has identified an alternative growth forecast, referred to as the “Made-in-Niagara Forecast”, of **694,000** people. The Made-in-Niagara Forecast was endorsed, in principle, by Regional Council in August 2021.

The Made-in-Niagara forecast is based on collaboration with area municipalities and Niagara 2051 working group. Through detailed evaluation of growth opportunities within Niagara, it was determined that the Growth Plan Schedule 3 forecast was below what is likely to occur in Niagara and an alternative forecast is required to ensure infrastructure (roads and pipes) are sized properly for development to 2051.

Component 2: Housing Need

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 increase through 2051, with a significant shift 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* (Appendix 1).

Formation rates identified in the *2051 Growth Update Memo* were extrapolated from the *Growth Plan* Schedule 3 forecast for the Made-in-Niagara forecast.

Table 4 identifies a need for **296,750 households** based on the 2051 population forecast of 694,000.

Table 4: 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	565	135	31.7%
20 - 24	14.5%	4,000	5,065	1,065	26.6%
25 - 29	35.2%	8,640	12,770	4,130	47.8%
30 - 34	48.7%	11,435	17,565	6,130	53.6%
35 - 39	52.9%	12,385	19,460	7,075	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	24,895	4,975	25.0%
55 - 59	58.6%	20,050	25,950	5,900	29.4%
60 - 64	58.9%	18,845	25,095	6,250	33.2%
65 - 69	61.2%	18,015	25,710	7,695	42.7%
70 - 74	61.7%	13,675	24,330	10,655	77.9%
75 - 79	65.3%	10,480	24,205	13,725	131.0%
80 - 84	66.5%	8,190	21,745	13,555	165.5%
84 - 89	60.7%	5,185	15,990	10,805	208.4%
90 +	46.3%	2,390	11,050	8,660	362.3%
Total	50.8% (2051)	183,830	296,750	112,920	61.4%

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 5 provides a summary of household forecast by housing type between 2021 and 2051.

Table 5: Household Forecast by Housing Type - 2021 to 2051

Household Forecast by Housing Type: 2021 to 2051					
Niagara Region	Single/Semi-Detached	Row House	Accessory Dwelling	Apartment Building	Total
Units	44,318	27,405	3,390	27,655	102,765
Share	43%	27%	3%	27%	100%

Component 3: Allocation of Housing Need to Area Municipalities

Allocation of Housing Need to area municipalities is based on input from area 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 area 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, the alternative Made-in-Niagara forecast was identified. The forecast represents an increase of 20,000 people and 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 6 provides municipal-level housing allocations by housing type.

Table 6: Housing Unit Growth by Type and Municipality, 2021 to 2051

Housing Unit Growth by Type and Municipality, 2021 to 2051				
Municipality	Single/Semi	Row	Apartment	Total
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	3,058	914	628	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	14,350
West Lincoln	6,030	2,390	310	8,730
Niagara Region	44,318	27,404	31,043	102,765

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 and has set an intensification rate of 60% based on the Regional Structure Strategy.

Within the DGA, the Growth Plan requires a density of 50 people and jobs per hectare. The Region has confirmed this is an appropriate target within Niagara.

To accommodate the 60% intensification rate and DGA density target, the Regional Structure has identified a series of Strategic Growth Areas (SGAs).

SGAs are lands within Urban Areas that are the focus for more significant intensification and higher-density uses. Introduced as part of the recent updates to the Growth Plan, SGAs identified by Provincial policy include:

- Urban Growth Centres;
- Major Transit Station Areas; and
- Other Strategic Growth Areas, which in Niagara, include Regional Growth Centres and District Plan Areas.

The Region will plan for growth and development in SGAs through the preparation of Secondary Plans and will work with municipalities with SGAs to ensure minimum targets are being achieved in local Official Plans and Zoning By-laws.

Urban Growth Centre: Downtown St. Catharines

The *Growth Plan* maps one Urban Growth Centres in Niagara: Downtown St. Catharines. This designation is for areas of existing or emerging downtown that are to be the focus of a substantial amount of growth and development, as well as focal area for investment in regional public service facilities, commercial uses, recreational uses, and major employment centres.

The *Growth Plan* requires that Downtown St. Catharines be planned to achieve a minimum density target of 150 residents and jobs combined per hectare by the year 2031. The existing density in the Downtown St. Catharines Urban Growth Centre is approximately 100 residents and jobs per hectare.

As described further in the next section, the Region also considers the Downtown St. Catharines Bus Station as a Major Transit Station Area. The bus terminal is located within the Urban Growth Centre, supports the Downtown as a civic, commercial, and recreational destination, and will play a role in future planning within the Urban Growth Centre.

Major Transit Station Areas

Major Transit Station Areas are defined by the *Growth Plan* as the area including and around any existing or planned *higher order transit* station or stop within a *settlement area*; or the area including and around a major bus depot in an urban core. *Major transit station areas* generally are defined as the area within an approximate 500 to 800 metre radius of a transit station, representing about a 10-minute walk.

Major Transit Station Areas encompass the lands around any existing or planned higher order transit station or stop within an Urban Area. For Niagara, these include the planned GO Transit Stations in the Town of Grimsby, City of St. Catharines, and City of Niagara Falls, and the future proposed GO Transit Station in the Town of Lincoln. Also included is the Downtown St. Catharines Bus Station, as noted above.

Growth Plan policies for Major Transit Station Areas only apply to areas located along an identified “priority transit corridor”. Currently, the Region’s GO Transit Stations are not identified along this corridor. As such, the *Growth Plan* has limited policy direction for Niagara’s MTSA’s.

The Region, in partnership with its area municipalities, proactively approved Secondary Plans for each station area to position and plan for higher densities similar to those identified as being on a priority transit corridor.

MTSA’s in Niagara include a mix of *delineated built-up area*, DGA and Employment Area.

Regional Growth Centres

The *Growth Plan* allows municipalities to determine the location and extent of other SGAs. Unlike the Urban Growth Centre and MTSA’s, other SGAs do not have specific *Growth Plan* policy sections that guide the form, density, and land use types permitted. These are referred to as “Other SGAs” or “Regional Growth Centres” interchangeably.

Other SGAs will be proactively planned to evolve in manner that shares the same principles of other areas that anticipate more robust growth. The Region will direct a significant amount of Niagara’s population and employment forecast to these areas even where those SGAs do not have the highest order transit the same density thresholds as others.

Currently identified is the Regional Growth Centre of Downtown Welland. A minimum density target of 125 people and jobs per hectare is assigned.

Further to the discussion on the MTSAs, the same consideration is needed for connection to the Downtown Welland Regional Growth Centre. The Regional Growth Centre needs to strengthen its public transit connections by extending or offering new transit services. This will be a critical link in providing access throughout the communities and the Region in general. Enhanced access to transit can improve opportunities for housing choice and access to employment opportunities, as well as Regional destinations of broader interest and reliance.

Secondary Plans will provide a vision to guide growth within these areas. The process can proactively support infill, growth and intensification opportunities, urban design to support compatibility and technical studies prepared in support of infrastructure and transportation capacity. This proactive process will ensure that the lands within the SGA are development-ready.

In addition to Downtown Welland, Other Strategic Growth Areas include the District Plan Areas of Brock and Glendale. Both these areas have been identified and planned through the District Plan process to provide specific direction for growth and development to transition into complete communities. Both areas will offer frequent transit service in the form of transit hubs to connect different routes and modes of transit. They will play an important role in connecting local, inter-municipal and inter-regional transit level services.

The Glendale District Plan is a blend of DGA and Employment Area.

The Regional Structure policies also contemplate Future Strategic Growth Areas for the Niagara Official Plan. South Niagara Falls around the proposed South Niagara Hospital is one of these areas. This future SGA will follow a comprehensive process to determine the boundary and identify a density target.

Table 7 identifies the density related to each SGA category:

Table 7: Strategic Growth Area Planned Density

Municipality	Minimum Density Target
Downtown St. Catharines Urban Growth Centre	150 people & jobs per hectare to 2031
GO Transit Station Areas in St. Catharines, Lincoln, Niagara Falls, and Grimsby	125 people & jobs per hectare to 2051
Downtown Welland Regional Growth Centre	125 people & jobs per hectare to 2051
Brock and Glendale Niagara District Plans	100 people & jobs per hectare to 2051

Table 8 provides household forecast by policy area for each municipality and identifies the overall intensification rate of 60%.

Table 8: Housing Forecast by Policy Area and Municipality, 2021 to 2051

Shares of Household Growth by Policy Area Niagara Region by Area 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%
Niagara Region	60%	39%	1%	100%

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 9 and **Table 10** 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 9: Housing Forecast by Unit Type, Delineated Built-Up Area, 2021 to 2051

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

Table 10: Housing Forecast by Unit Type, DGA, 2021 to 2051

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

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 office/*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*. *Major office* is focused with the St. Catharines *Urban Growth Centre*, with some growth allocated to *Major Transit Station Areas*.

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, PDS 17-2021: 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 11 provides an estimated number of jobs to be added within the DGA portion of the Community Area for each urban municipality between 2021 and 2051.

Table 11: DGA Community Area Job Forecast, 2021 to 2051

DGA Community Area Job Forecast, 2021-2051	
Municipality	Total
Fort Erie	245
Grimsby	5
Lincoln	745
Niagara Falls	1,065
Niagara-on-the-Lake	1,090
Pelham	560
Port Colborne	360
St. Catharines	1,555
Thorold	530
Welland	265
West Lincoln	2,000
Niagara Region	8,425

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.

To determine land need, the forecast housing units in **Table 10** 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 rate¹ for each unit type.

The DGA Community Area job forecasts from **Table 11** 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 planned density target for each municipality, identified in **Table 2**.

The Community Area land need based on the difference between area required and area designated.

Table 12 provides the *Community Area* population and employment forecasts to 2051.

¹ 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 2022.

Table 12: Overall Community Area Land Need, 2021 to 2051 (before Final Adjustment)

DGA Community Area Land Need, 2021-2051				
Municipality	Population and Employment Growth within the Unplanned DGA	Area Required (ha)	Area Designated² (ha)	Additional Land Need Before Final Adjustment (ha)*
Fort Erie	8,170	165	60	105
Grimsby	0	0	0	0
Lincoln	2,410	25	25	0
Niagara Falls	23,470	470	160	310
Niagara-on-the-Lake	9,870	80	75	0
Pelham	3,215	65	25	40
Port Colborne	4,615	90	250	-160
St. Catharines	3,655	60	60	0
Thorold	4,830	95	250	-155
Welland	5,770	115	115	0
West Lincoln	20,545	375	40	330
Niagara Region	86,550	1,540	1,095	470

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

Community Area Land Needs Summary

Niagara’s 12 area municipalities can be placed into two general categories related to the Community Area assessment:

1. Additional Community Area Land Required

² 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 area removed is based on Option 3B as recommended by the Natural Environment Strategy.

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

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 Welland³ 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. These lands are discussed further in the following section.

Additional Considerations and Revisions

The *Methodology* includes a specific final step for “Adjustments” that are supported through the assessment.

The following is considered an Adjustment:

- The area for settlement area boundary expansion is adjusted upwards in a minor way, if necessary, to ensure logical boundaries of settlement areas. This will generally be an arterial or concession road or other man-made or natural definable feature. The intent is to establish logical settlement area boundaries and avoid partial neighbourhoods or irregular servicing boundary. Such adjustments would require slight increases to the forecast assumed in implementing the assessment, and;
- Adjustments to land need may be made in order to account for:
 - a. Constrained land within the settlement area that requires additional infrastructure (e.g. servicing, transit, highways);

³ The City of Welland undertook a pre-MCR urban boundary expansion. The forecasts and lands need assessment are reflective of the updated Welland urban boundary. No additional Community Area land is needed within the City of Welland for development to 2051.

- b. Lands that may not develop within the horizon of the Plan due to other factors such as landowner choice to not develop for the purposes they are designated for;
- c. The length of the planning process to make lands ready for development; and,
- d. Other economic (e.g. provision for major businesses) and demographic (e.g. increases in immigration and emigration) considerations not anticipated in growth scenarios used in the initial municipal analysis.

The revised LNA identifies 315 hectares of existing Community Area land that meets this Final Adjustment criteria.

Specifically, 210 hectares of existing Community Area lands are immediately adjacent to active or planned aggregate operations. These lands may not be available for development within the planning horizon, depending on the life span of the aggregate operation and studies associated with development applications.

Another 105 hectares have infrastructure limitations in the planning horizon. These lands are not serviced at this time and would require extensive expansion of infrastructure and comprehensive land use planning.

The location of these adjustment lands are in Port Colborne and Thorold. These lands are not removed from the urban area, nor are any special land use designations proposed. Rather, the revised LNA identifies an adjustment needed to discount the land supply available to accommodate forecasted growth.

Table 13 provides a summary of Community Area land needs and Final Adjustments.

Table 13: Community Area Land Need and Final Adjustments.

Land Need Category	Municipality	Area (ha)
Community Area Expansion	Fort Erie	105
	Niagara Falls	310
	Pelham/Thorold	40
	West Lincoln	330
Land Need Adjustment	Port Colborne	-160
	Thorold	-155

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 area 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 14 provides an overview of employment growth by municipality, by employment type, from 2021 to 2051.

Table 14: Niagara Region Employment Growth, 2021 to 2051, by Employment Type

Total Employment Growth by Employment Type, 2021-2051					
Municipality	Office/ Major Office	Population- Related Employment	Employment Land Employment	Rural Employ- ment	Total Employ- ment
Fort Erie	140	2,890	4,430	440	7,900
Grimsby	380	2,070	1,430	390	4,270
Lincoln	100	1,580	650	1,500	3,830
Niagara Falls	1,150	15,550	2,770	850	20,320
Niagara-on-the-Lake	1,000	3,040	290	1,480	5,810
Pelham	10	1,600	0	710	2,320
Port Colborne	0	750	350	540	1,640
St. Catharines	4,320	10,780	1,880	590	17,570
Thorold	250	2,540	1,020	170	3,980
Wainfleet	0	0	0	420	420
Welland	360	4,610	5,300	480	10,750
West Lincoln	160	3,580	1,760	520	6,020
Niagara Region	7,870	48,990	19,880	8,090	84,830

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 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%⁴ occurring within *Employment Areas*.

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

Table 15 provides an overview of employment allocations by municipality, employment type and geography. Forecasts are provided as proportions.

Table 15: Employment Growth by Category and Location, 2021 to 2051

Office Growth by Geography, 2021-2051			
Municipality	Community Area	Employment Area	Rural Area
Fort Erie	0.50	0.50	0.00
Grimsby	0.50	0.50	0.00
Lincoln	0.50	0.50	0.00
Niagara Falls	0.80	0.20	0.00
Niagara-on-the-Lake	0.00	1.00	0.00
Pelham	1.00	0.00	0.00
Port Colborne	0.50	0.50	0.00
St. Catharines	0.90	0.10	0.00
Thorold	0.50	0.50	0.00
Wainfleet	0.00	0.00	1.00
Welland	0.50	0.50	0.00
West Lincoln	0.50	0.50	0.00
Population-Related Employment Growth by Policy Area, 2021-2051			
Municipality	Community Area	Employment Area	Rural Area
Fort Erie	0.94	0.05	0.01
Grimsby	0.94	0.05	0.01

⁴ 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.

Lincoln	0.94	0.05	0.01
Niagara Falls	0.94	0.05	0.01
Niagara-on-the-Lake	0.74	0.25	0.01
Pelham	0.99	0.00	0.01
Port Colborne	0.94	0.05	0.01
St. Catharines	0.94	0.05	0.01
Thorold	0.74	0.25	0.01
Wainfleet	0.00	0.00	1.00
Welland	0.94	0.05	0.01
West Lincoln	0.94	0.05	0.01
Employment Land Employment Growth by Policy Area, 2021-2051			
Municipality	Community Area	Employment Area	Rural Area
Fort Erie	0.00	0.99	0.01
Grimsby	0.00	0.99	0.01
Lincoln	0.00	0.80	0.20
Niagara Falls	0.09	0.90	0.01
Niagara-on-the-Lake	0.00	0.99	0.01
Pelham	0.50	0.00	0.50
Port Colborne	0.00	0.99	0.01
St. Catharines	0.05	0.95	0.01
Thorold	0.00	0.95	0.05
Wainfleet	0.00	0.00	1.00
Welland	0.00	0.99	0.01
West Lincoln	0.00	0.99	0.01
Rural Employment Growth by Policy Area, 2021-2051			
Municipality	Community Area	Employment Area	Rural Area
Fort Erie	0.00	0.00	1.00
Grimsby	0.00	0.00	1.00
Lincoln	0.00	0.00	1.00
Niagara Falls	0.00	0.00	1.00
Niagara-on-the-Lake	0.00	0.00	1.00
Pelham	0.00	0.00	1.00
Port Colborne	0.00	0.00	1.00
St. Catharines	0.00	0.00	1.00
Thorold	0.00	0.00	1.00
Wainfleet	0.00	0.00	1.00

Welland	0.00	0.00	1.00
West Lincoln	0.00	0.00	1.00

Table 16 provides a summary of employment forecasts by location.

Table 16: Employment Growth by Type and Municipality, 2021 to 2051

Employment Growth by Policy Area, 2021-2051			
Municipality	Community Area	Employment Area	Rural Area
Fort Erie	2,785	4,600	515
Grimsby	2,135	1,710	425
Lincoln	1,535	650	1,645
Niagara Falls	15,785	3,500	1,035
Niagara-on-the-Lake	2,250	2,045	1,515
Pelham	1,595	0	725
Port Colborne	705	385	550
St. Catharines	14,115	2,755	715
Thorold	2,005	1,730	245
Wainfleet	0	0	420
Welland	4,515	5,660	580
West Lincoln	3,445	2,000	575
Niagara Region	50,870	25,035	8,945

Component 3: Employment Area Capacity

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

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

Table 17 provides a summary of existing capacity within each municipal Employment Area.

Employment Growth Potential by Municipality and Employment Area, 2021-2051				
Municipality	Employment Area ID	Vacant Land Supply (ha)	Vacant Land Density Target (jobs/ha)	Existing Employment Area Capacity
Fort Erie	FE-1 Stevensville Industrial Cell	9	15	135
	FE-2 International Peace Bridge Trade Hub	46	20	915
	FE-3 Bridgeburg Rail Zone	11	20	215
Grimsby	GRM-1 West Niagara QEW Corridor	17	60	1,035
	GRM-2 Casablanca-East QEW Corridor	10	55	535
	GRM-3 Main Street East Employment District	3	40	110
Lincoln	LIN-1 Beamsville GO Precinct	12	45	535
	LIN-2 King Street at Bartlett Junction	0	0	0
Niagara Falls	NF-1 Highway 405 Employment Area	8	20	150

Employment Growth Potential by Municipality and Employment Area, 2021-2051				
Municipality	Employment Area ID	Vacant Land Supply (ha)	Vacant Land Density Target (jobs/ha)	Existing Employment Area Capacity
	NF-2 North Niagara Falls Secure Storage Employment Area	22	30	660
	NF-3 QEW / 420 Employment Area	1	50	25
	NF-4 QEW Centre Employment Area	2	65	140
	NF-5 Montrose Road Industrial Area	108	20	2,160
	NF-6 Dorchester Road Employment Area	0	0	0
	NF-7 Stanley Avenue Business Park	10	25	260
	Niagara-on-the-Lake	NOTL-1 Virgil Business Park	5	45
NOTL-2 Glendale Momentum District		34	80	2,685

Employment Growth Potential by Municipality and Employment Area, 2021-2051				
Municipality	Employment Area ID	Vacant Land Supply (ha)	Vacant Land Density Target (jobs/ha)	Existing Employment Area Capacity
Port Colborne	PC-1 Port Colborne West Transshipment Terminal	15	25	380
	PC-2 Port Colborne East Transshipment Terminal	39	30	1,160
St. Catharines	STC-1 Port Weller Employment Area	25	40	1,020
	STC-2 Hannover Employment Area	3	100	250
	STC-3 Hiscott Employment Area	0	0	0
	STC-4 Bunting / Welland / Eastchester / Cushman Road Employment Area	14	45	640
	STC-5 West End Employment Area	8	80	645
	STC-6 Glendale Avenue East	2	45	105

Employment Growth Potential by Municipality and Employment Area, 2021-2051				
Municipality	Employment Area ID	Vacant Land Supply (ha)	Vacant Land Density Target (jobs/ha)	Existing Employment Area Capacity
	Employment Area			
Thorold	THO-1 Brock District University Innovation Park	6	95	610
	THO-2 McCleary Highway 58 Industrial Park	11	25	275
	THO-3 Thorold Tunnel Crossing	1	25	30
	THO-4 Thorold South Allanburg Industrial Park	48	25	1,210
Welland	WEL-1 North Woodlawn Hospitality Node	21	45	930
	WEL-2 South Woodlawn Industrial Niche	37	15	550
	WEL-3 Highway 140 Canalside Artery	122	25	3,045
	WEL-4 Flatwater Rally	1	25	30

Employment Growth Potential by Municipality and Employment Area, 2021-2051				
Municipality	Employment Area ID	Vacant Land Supply (ha)	Vacant Land Density Target (jobs/ha)	Existing Employment Area Capacity
	Employment Area			
West Lincoln	WL-1 Smithville Industrial District	30	20	600

Table 18 provides an aggregated assessment of municipal Employment Area capacity.

Table 18: Existing Employment Area Potential for Additional Employment

Employment Area Potential Within Existing Areas	
Municipality	Additional Employment Potential
Fort Erie	1,265
Grimsby	1,680
Lincoln	500
Niagara Falls	3,395
Niagara-on-the-Lake	2,915
Pelham	0
Port Colborne	1,540
St. Catharines	2,665
Thorold	2,130
Wainfleet	0
Welland	4,550
West Lincoln	600
Niagara Region	21,235

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 16**) with the job growth potential within existing *Employment Areas* (**Table 18**). 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 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.

Table 19 provides a summary of the Employment Area Land Needs.

Table 19: 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	3,335	20	175
Grimsby	30	50	0
Lincoln	150	45	0
Niagara Falls	105	25	0
Niagara-on-the-Lake	-870	80	-10
Pelham	0	0	0
Port Colborne	-1,155	30	-40
St. Catharines	95	50	0
Thorold	-400	25	-15
Wainfleet	0	0	0
Welland	1,105	25	45
West Lincoln	1,400	20	70
Niagara Region	3,800	30	225

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 and Township of West Lincoln do not have sufficient supply of *Employment Area* to accommodate the forecast growth to 2051. There was a small need identified in Welland and a small oversupply in Port Colborne.

The Region has a need for an additional 245 hectares of developable Employment Area lands. **Table 20** provides a summary of where additional Employment Area lands will be distributed in Niagara.

Table 20: Employment Area needs by municipality to 2051

Land Need Category	Municipality	Area (ha)
Employment Area Expansion	Fort Erie	175
	West Lincoln	70

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 21 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 21: 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	60%	50%
West Lincoln	40	570	60%	100%

Residential land need within Rural Settlement Areas was determined by converting the housing growth to area (hectares).

In Niagara, residential lots within Rural Settlement Areas must be a minimum of 1 hectare in size. However, lots may be reduced to 1 acre based on studies. To determine the developable lot size for the Rural Settlement Area assessment, staff analyzed the vacant land supply within hamlets and the surrounding lot fabric of existing development.

It was determined that new residential lots within Rural Settlement Areas will have an average lot size of 0.6 hectares or 1.5 acres.

Table 22 provides an overview of residential land needs within Rural Settlement Areas.

Table 22: Rural Settlement Area Forecasts (Housing), 2021 to 2051

Rural Settlement Area Forecasts: Housing 2021 to 2051		
Municipality	Housing Forecast	Residential Need (ha)
Fort Erie	0	0
Port Colborne	10	6
Wainfleet	210	140
West Lincoln	40	25

Rural Employment land need within Rural Settlement Areas was determined by converting employment growth to area (hectares).

Employment densities were calculated based on existing businesses identified through the Niagara Employment Inventory.

Table 23 provides an overview of employment land needs within Rural Settlement Areas.

Table 23: Rural Settlement Area Forecasts (Employment), 2021 to 2051

Rural Settlement Area Forecasts: Employment 2021 to 2051			
Municipality	Employment Forecast	Employment Density (jobs per hectare)	Employment Need (ha)
Fort Erie	50	35	0
Port Colborne	550	10	55
Wainfleet	275	15	20
West Lincoln	335	10	35

Finally, the overall land need for Rural Settlement Areas was determined by adding the residential and employment land needs, and subtracting existing supply.

Table 24 provides an overview of Rural Settlement Area land needs.

Table 24: Rural Settlement Area Land Needs to 2051

Rural Settlement Area Land Needs			
Municipality	Residential and Employment Land Need (ha)	Existing Supply (ha)	Land Need (ha)
Fort Erie	0	0	0
Port Colborne	60	80	-20
Wainfleet	160	85	75
West Lincoln	60	20	40

Based on the Rural Settlement Area assessment, an additional 75 hectares is needed within Wainfleet and 40 hectares within West Lincoln.

Land Needs Assessment Results

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

The Land Needs Assessment has determined that **830 hectares** of additional developable land is required to achieve the minimum forecasts associated with the Made-in-Niagara forecast.

Table 25 provides a summary of each Land Need category and overall Regional Land Need.

Table 25: Niagara 2051 Land Needs Requirement by Category

Land Need Category	Expansion Land Need (ha)
Community Area	785
Employment Area	245
Rural Settlement Area	110
Land Need Adjustment	-315
Regional Land Need	830

Table 26 summarizes how the Land Needs will be accommodated across Niagara, and reflects the areas recommended within the Settlement Area Boundary Review.

Table 26: Land Need by Category and Municipality

Land Need Category	Municipality	Area (ha)
Community Area Expansion	Fort Erie	105
	Niagara Falls	310
	Pelham/Thorold	40
	West Lincoln	330
Employment Area Expansion	Fort Erie	175
	West Lincoln	70
Rural Settlement Expansion	Wainfleet	75
	West Lincoln	40
Land Need Adjustment	Port Colborne	-160
	Thorold	-155

The Settlement Area Boundary Review and associated expansions recommendations establish Settlement Area Boundaries that can accommodate the Made-in-Niagara Forecast.

Approval of the recommended Settlement Area Boundary Expansions would result in a Niagara 2051 land need of zero hectares of additional land.

Conclusion

This LNA Summary represents the land needs requirements for 2051.

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 the final assessment is approved.

In preparing this document, careful consideration was given to input from the public, agency and area municipalities.

Appendix 1.1 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).