

Technical Advisory Group (TAG)

# United Counties of Leeds and Grenville Growth Management Strategy



September 10, 2025

HEMSON

# Key Study Objectives

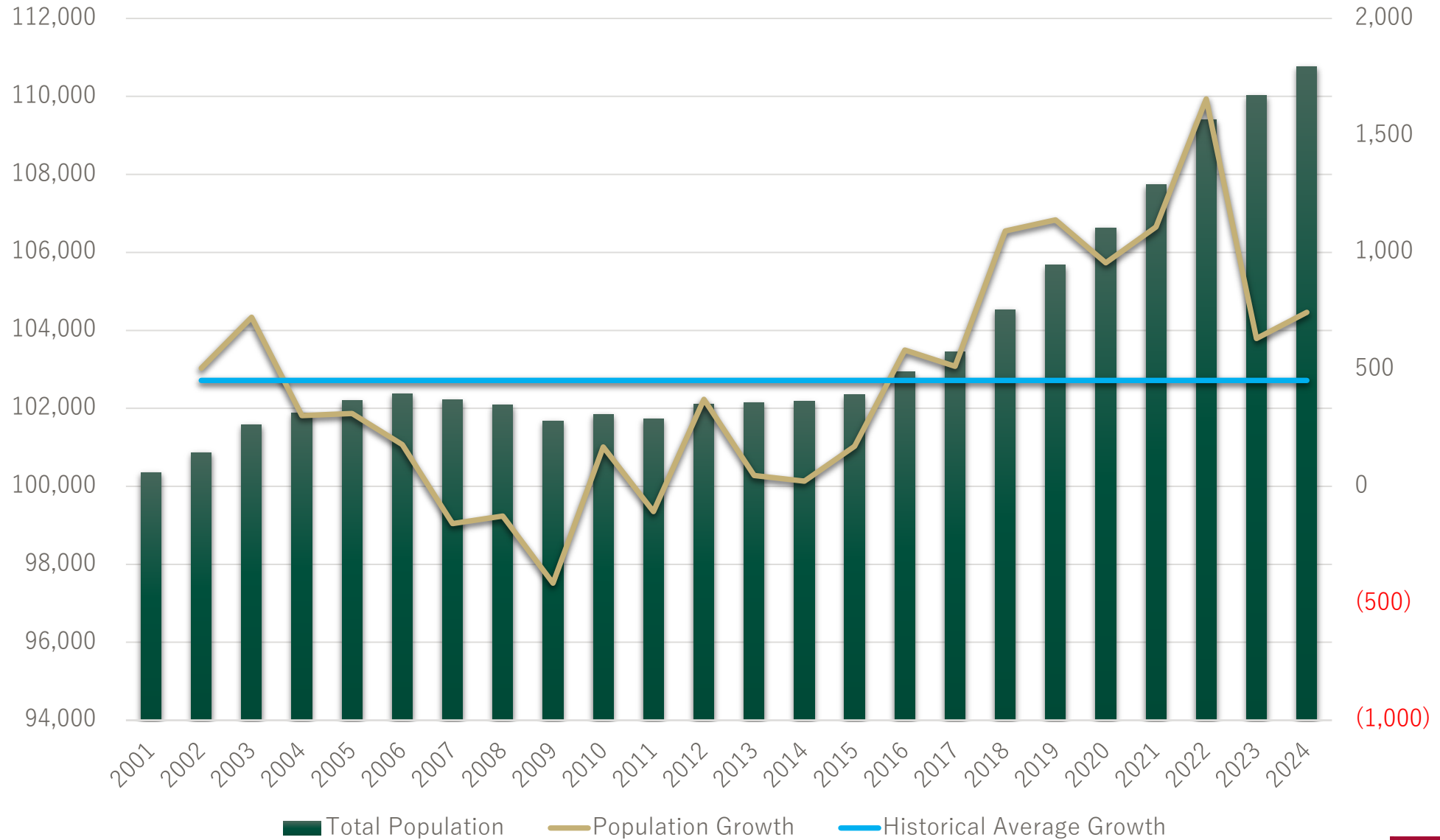
- Prepare Counties-wide growth forecasts of population, households and employment
- Undertake a land-needs assessment
- Allocate Counties-wide growth to local municipalities
- Consult with local municipalities and stakeholder
- Develop applicable policy



# Our Focus Today is the UCLG Census Division (CD)

- Growth Trends
- Policy Framework
  - Ministry of Finance Population Projections (August 2025)
  - Proposed Update to Provincial Projection Methodology Guideline
- UCLG Forecast of Population, Household, Housing and Employment
  - Key Demographic Characteristics
  - Employment Activity
- Next Steps

# Census Division Growth Since 2001

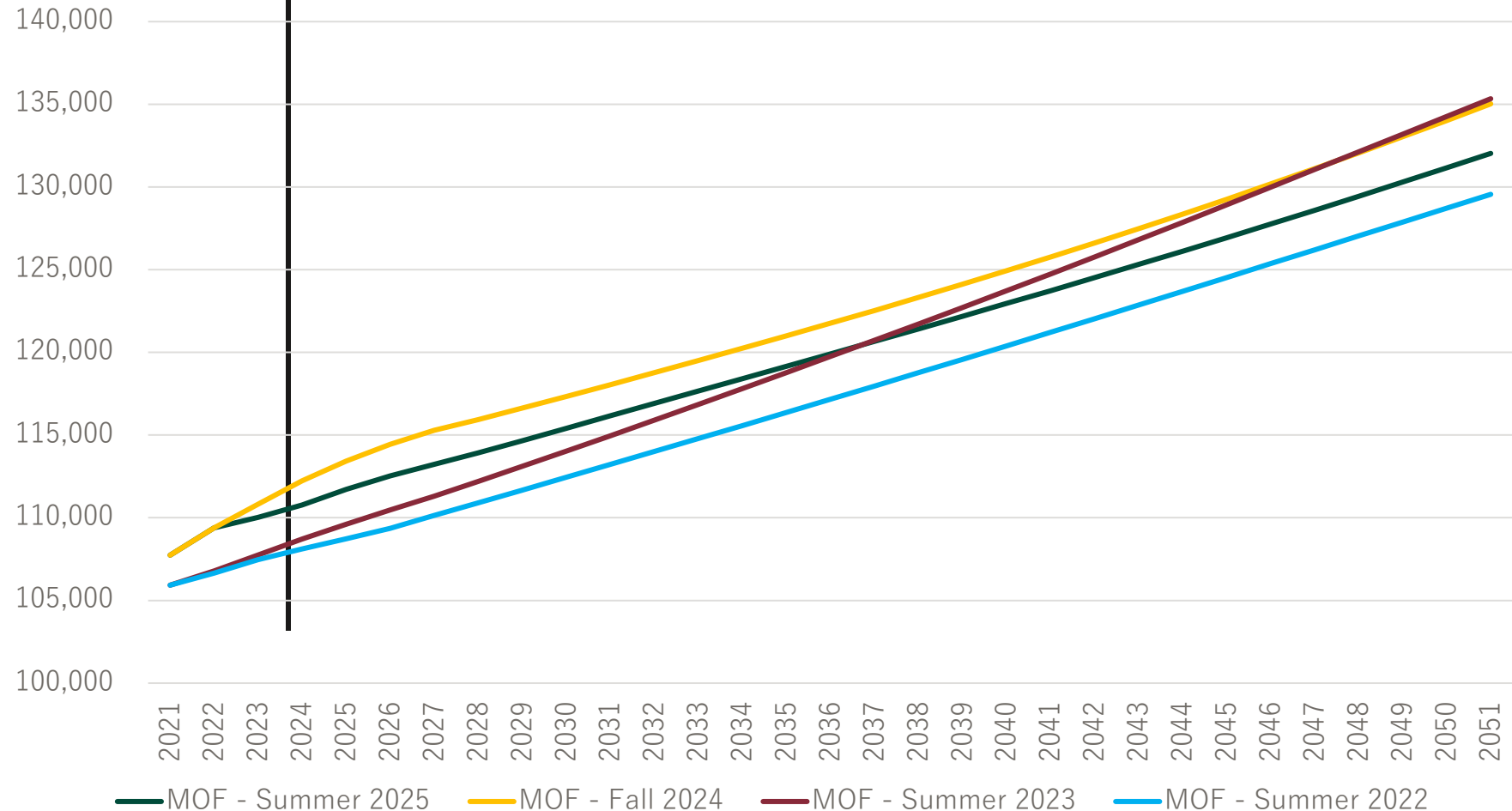


# This Assignment Addresses *Long-Term Growth*

## Annual Population Growth 2021-2051

- MOF 2022: 790
- MOF 2023: 980
- MOF 2024: 910
- MOF 2025: 810

UCLG Census Division – Population 2021-2051



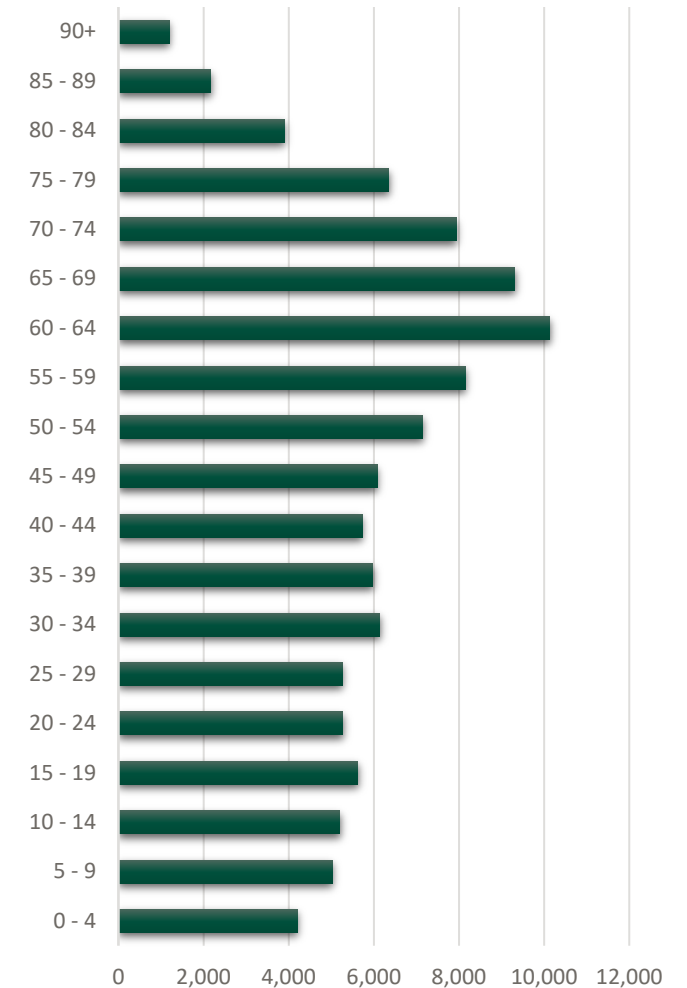
# Provincial Population Outlook

- Population growth in Ontario is projected to slow
- Province-wide trends in Statistics Canada's Quarterly Demographic Estimates (released June 2025):
  - Immigration remains high, but much lower than in recent years
  - Ontario's population fell by more than 5,000 from Q1 to Q2 2025
  - Non-permanent residents in Ontario declined by more than 30,000 people from Q1 to Q2 2025—mainly people holding a study permit only

# MOF Population Projections Summer 2025

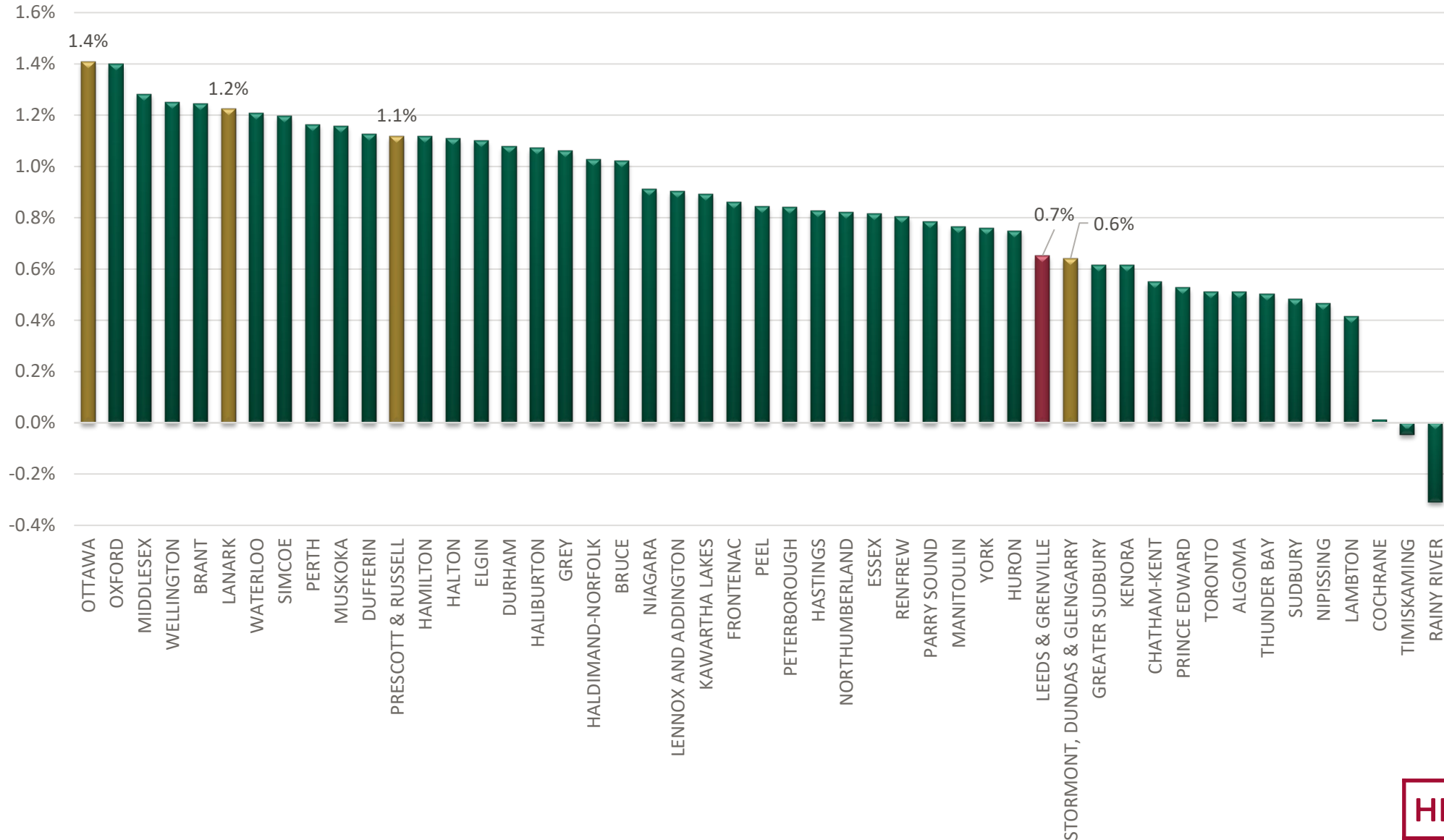
- Ontario's 2051 population projection is now 20,542,000
  - 262,000 fewer people than the Interim Update, Spring 2025
  - 1,580,000 fewer people than the Fall 2024 projection
- Growth in UCLG Census Division projected to:
  - Increase by an average of 0.7% annually to 2051
  - Slow in the short-term
  - Continue after 2040, notwithstanding an ageing population

UCLG CD - 2024 Age Structure



# MOF Population Projections Summer 2025

Average Annual Growth Rate



# Proposed Updates to the Projection Methodology Guideline

- New population and employment forecasts to be implemented at the time of their next OP update
- Municipalities to plan to meet projected needs for at least 20 years, but not more than 30
- **Municipalities shall use the most recent MOF projections published**
- Consider updating their forecasts near the release of the most recent census
- A coordinated, integrated and comprehensive approach should be used when dealing with planning matters within municipalities, across lower, single and/or upper-tier municipal boundaries, and with other orders of government, agencies, boards, and Service Managers

# MOF Projection vs GMS Forecast

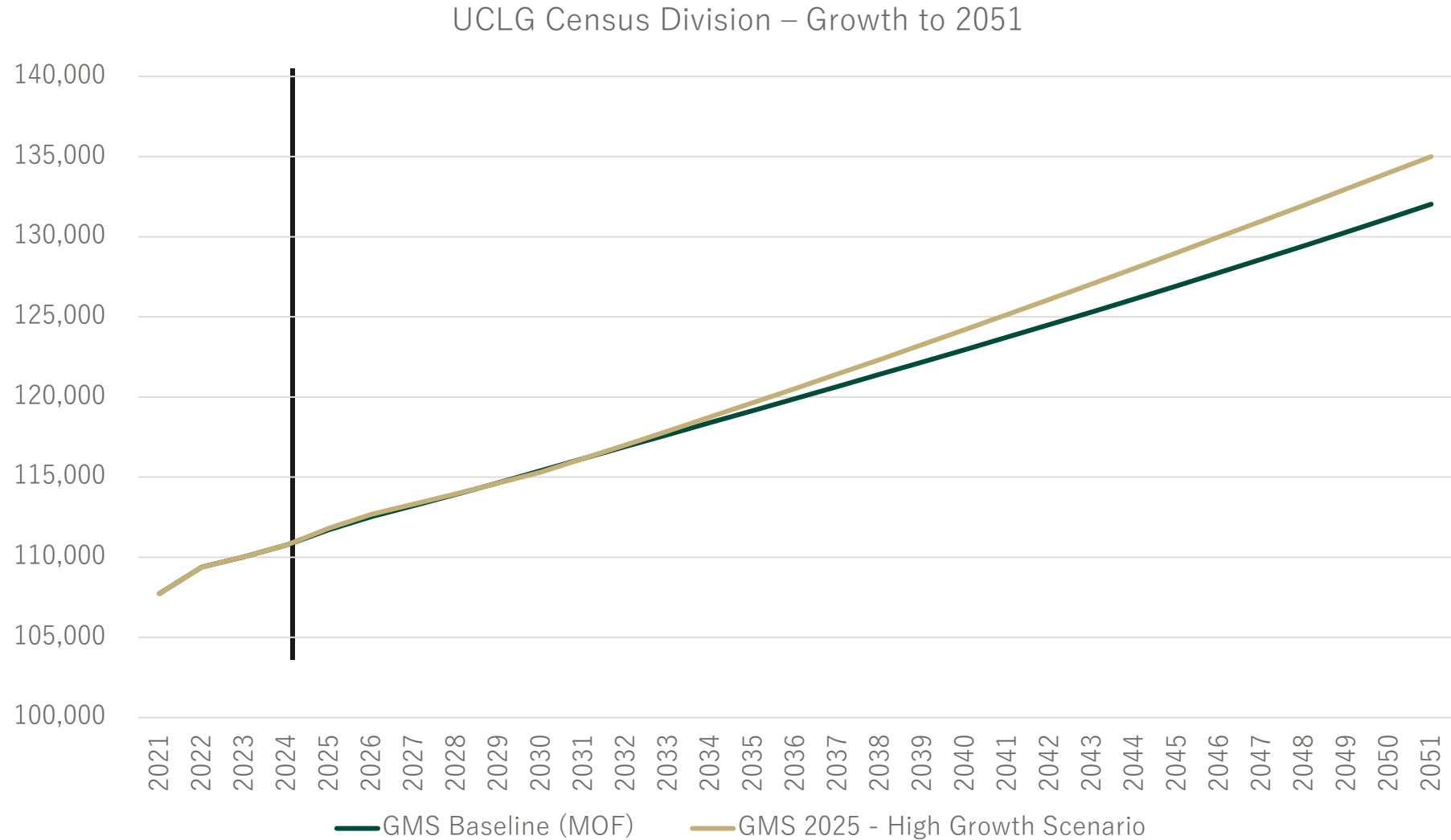
**Projections and forecasts:** A projection extrapolates present trends (e.g., fertility, mortality, and migration) to a future state (e.g., population) based on the assumption that the trends would continue. A projection is neutral and does not consider how changes in assumptions or potential uncertainty in the continuation of past trends would impact the future. By contrast, a forecast is a best estimate to predict a future state (e.g., population, employment) that builds on present trends and considers the potential impacts that changing variables and assumptions may have.

Pg. 5 of the Proposed Updates to the Projection Methodology Guideline

# Growth Management Strategy Population Forecast Scenarios

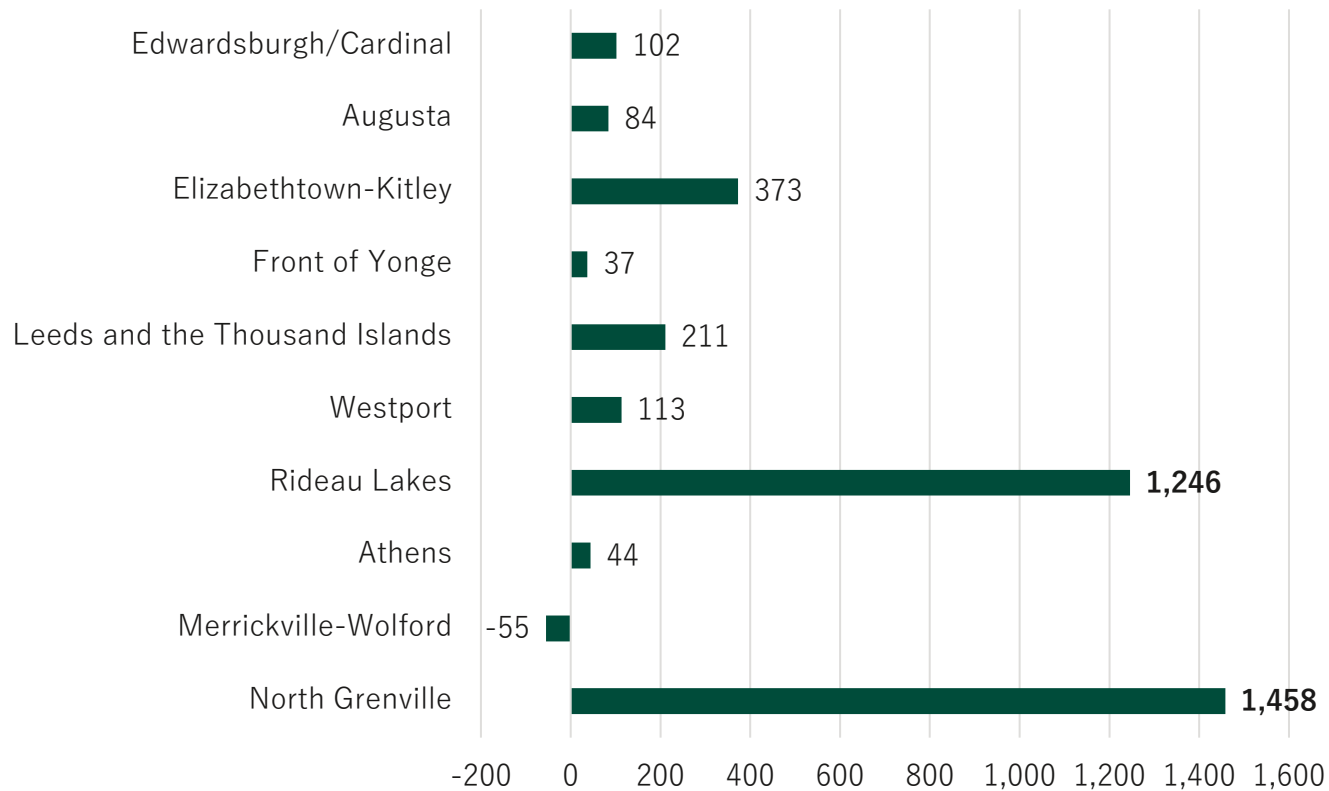
## Annual Population Growth 2021-2051

- **GMS Baseline (MOF): 810**
- **GMS High Growth Scenario: 910**

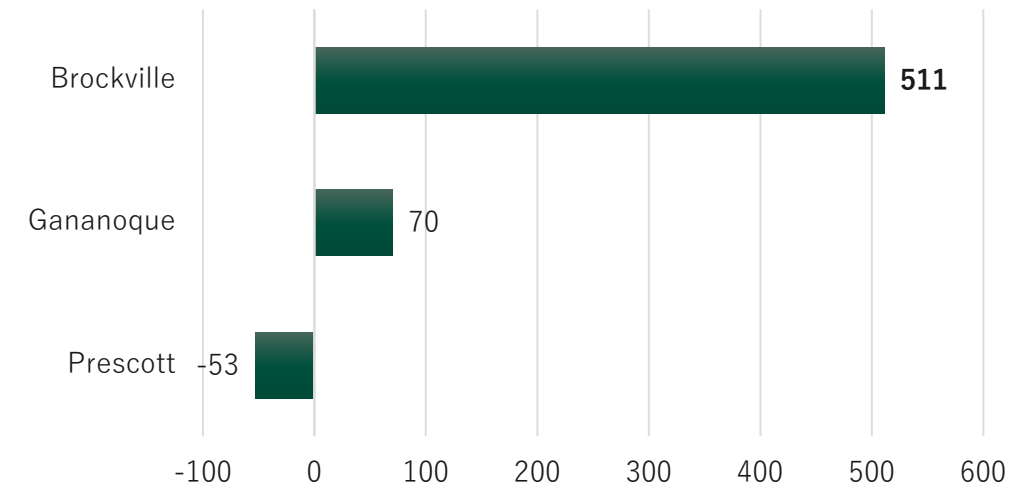


# Recent Population Growth (2020-2024) is Concentrated in a few Municipalities

Population Growth by Lower Tier Municipality



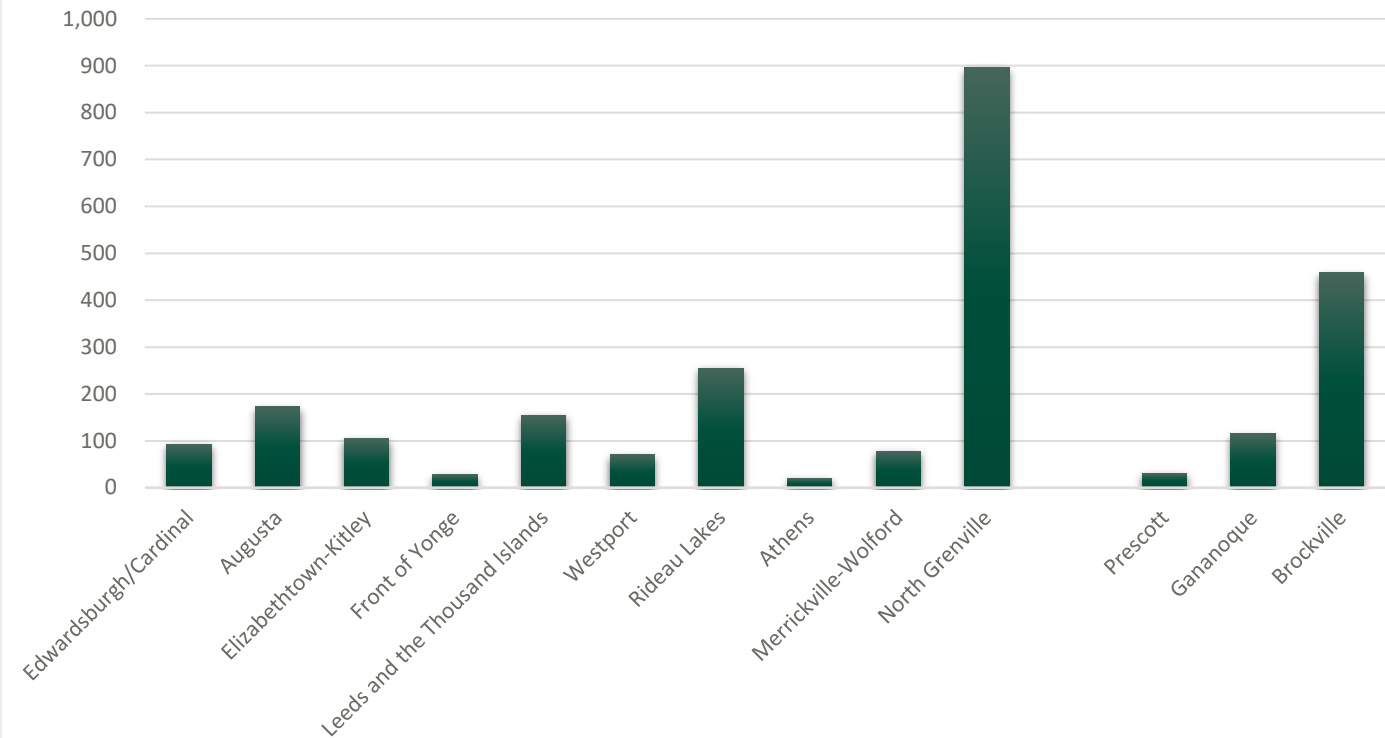
Population Growth by Separated Municipality



# Recent Building Activity

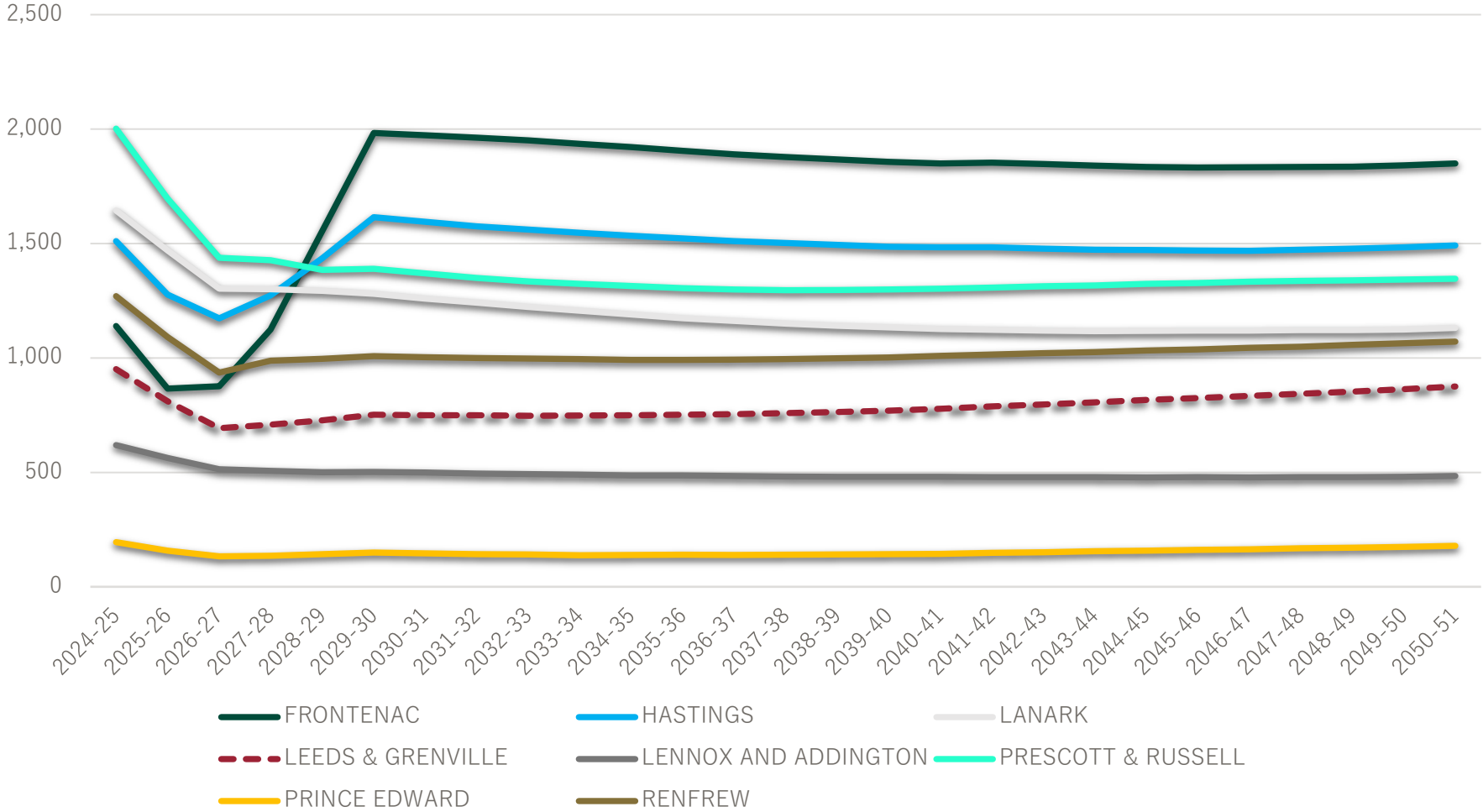
- Permits for new units since last Census have surpassed the 2016-2021 period
  - 2,478 permits (56% singles/semis; 19% rows; 25% apartments)
    - 36% in North Grenville
    - 19% in Brockville
    - 10% in Rideau Lakes
    - 7% in Augusta
    - 28% in remaining municipalities
  - 75% of all apartments in North Grenville and Brockville

Residential Building Permits Issued, 2021-2025 (May)

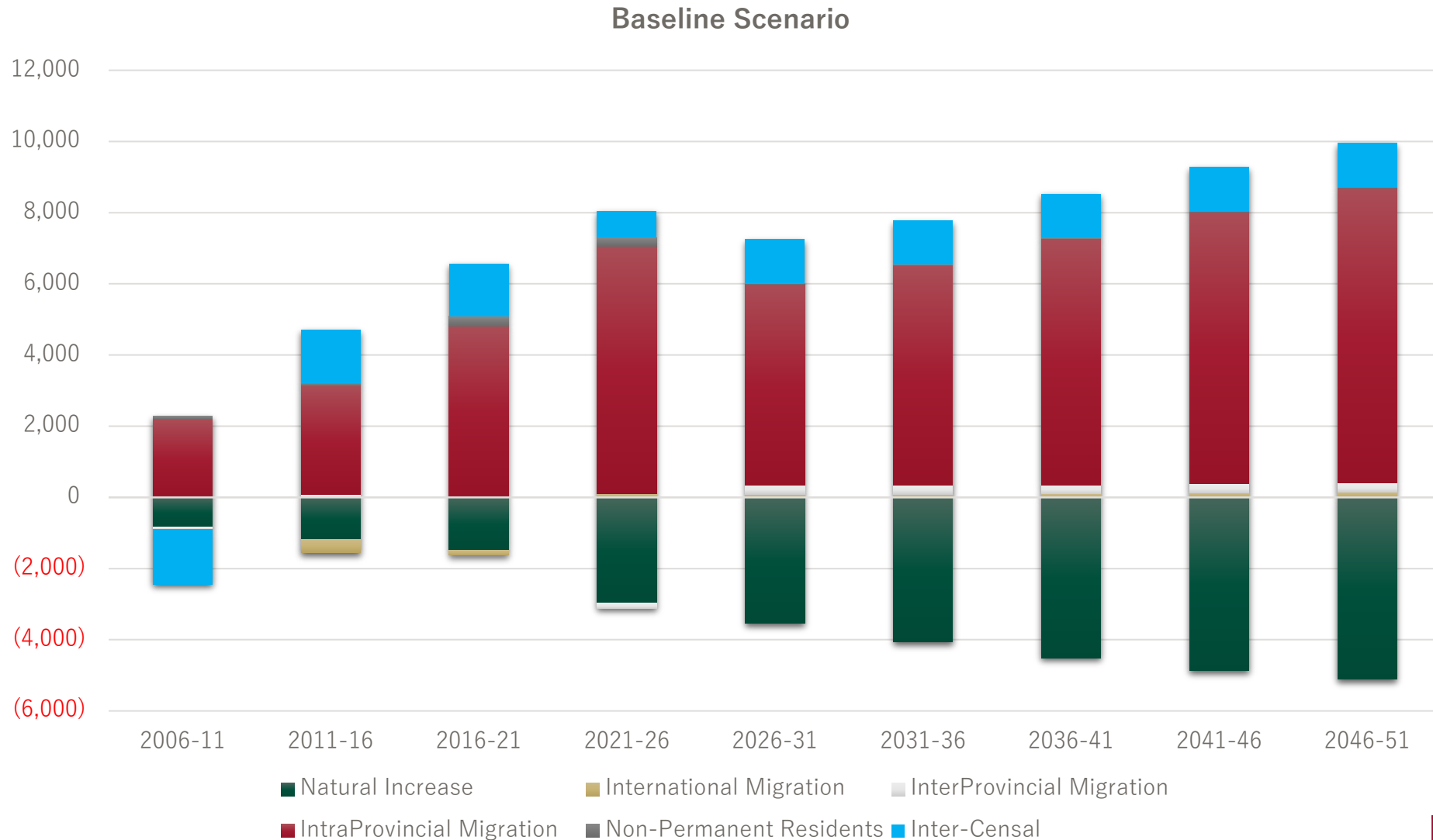


# Short-Term Growth Will Slow, But Not Stall

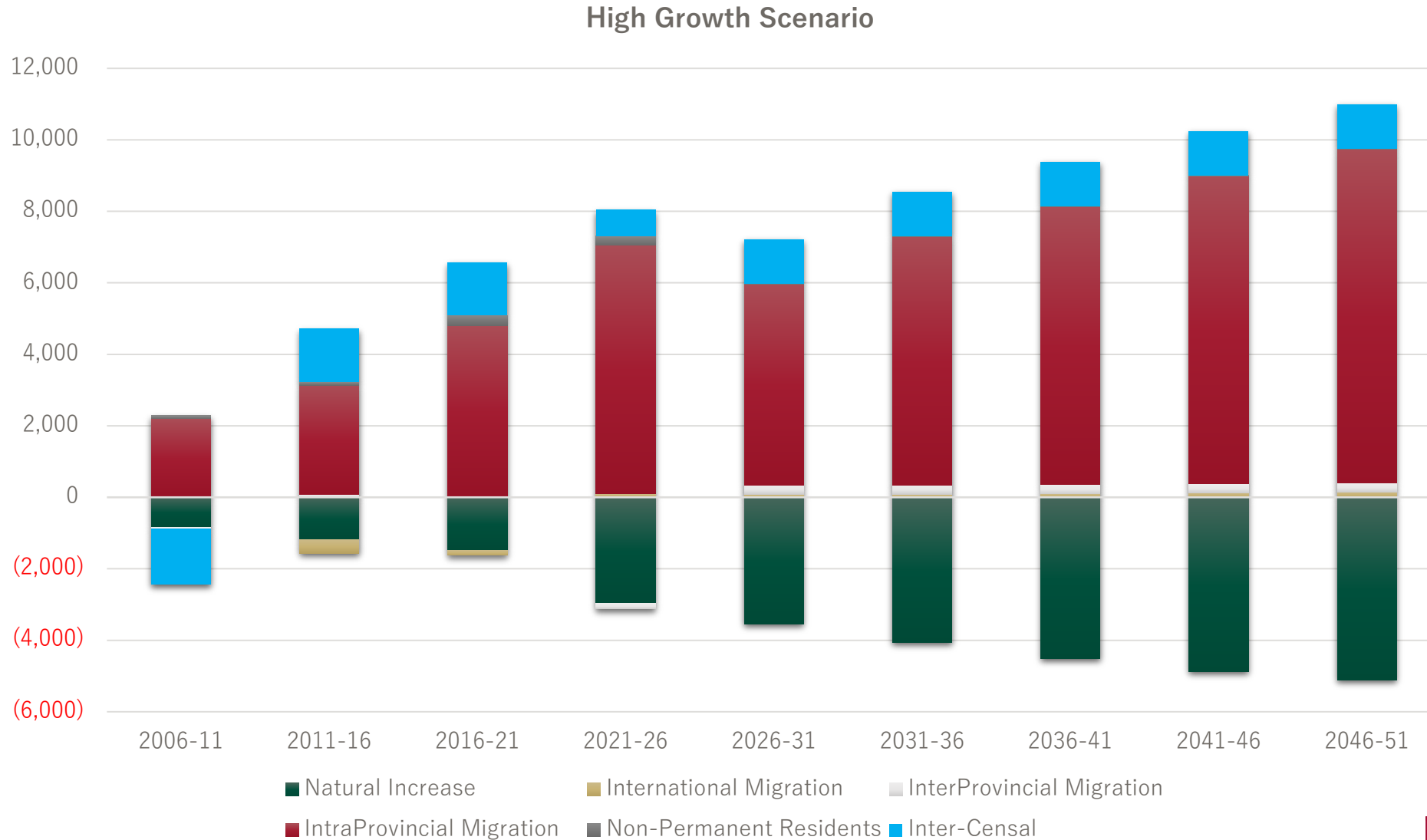
Summer 2025 MOF Projections: Annual Growth to 2051



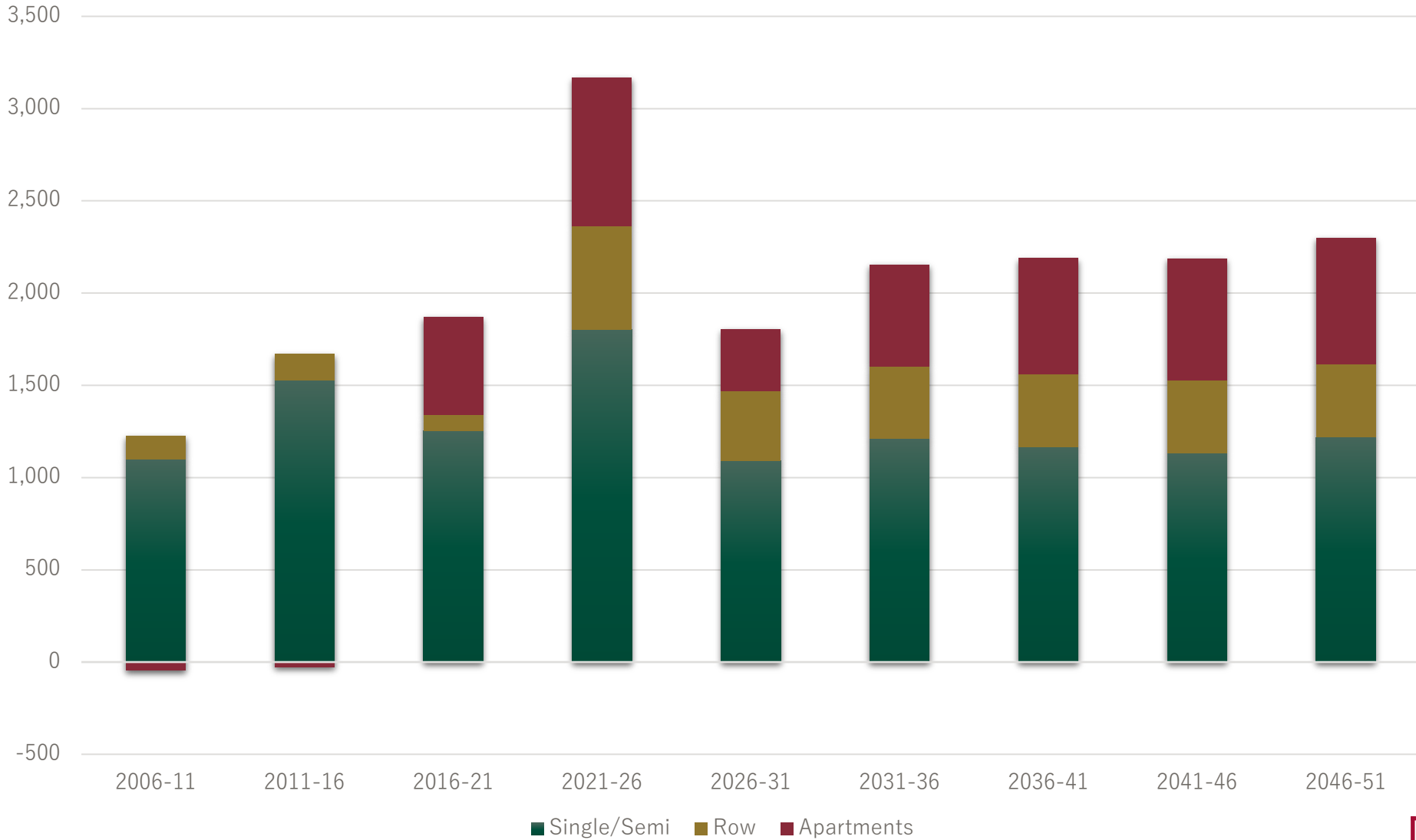
# Components of Population Growth – UCLG CD



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# Housing Forecast – UCLG CD Baseline Scenario



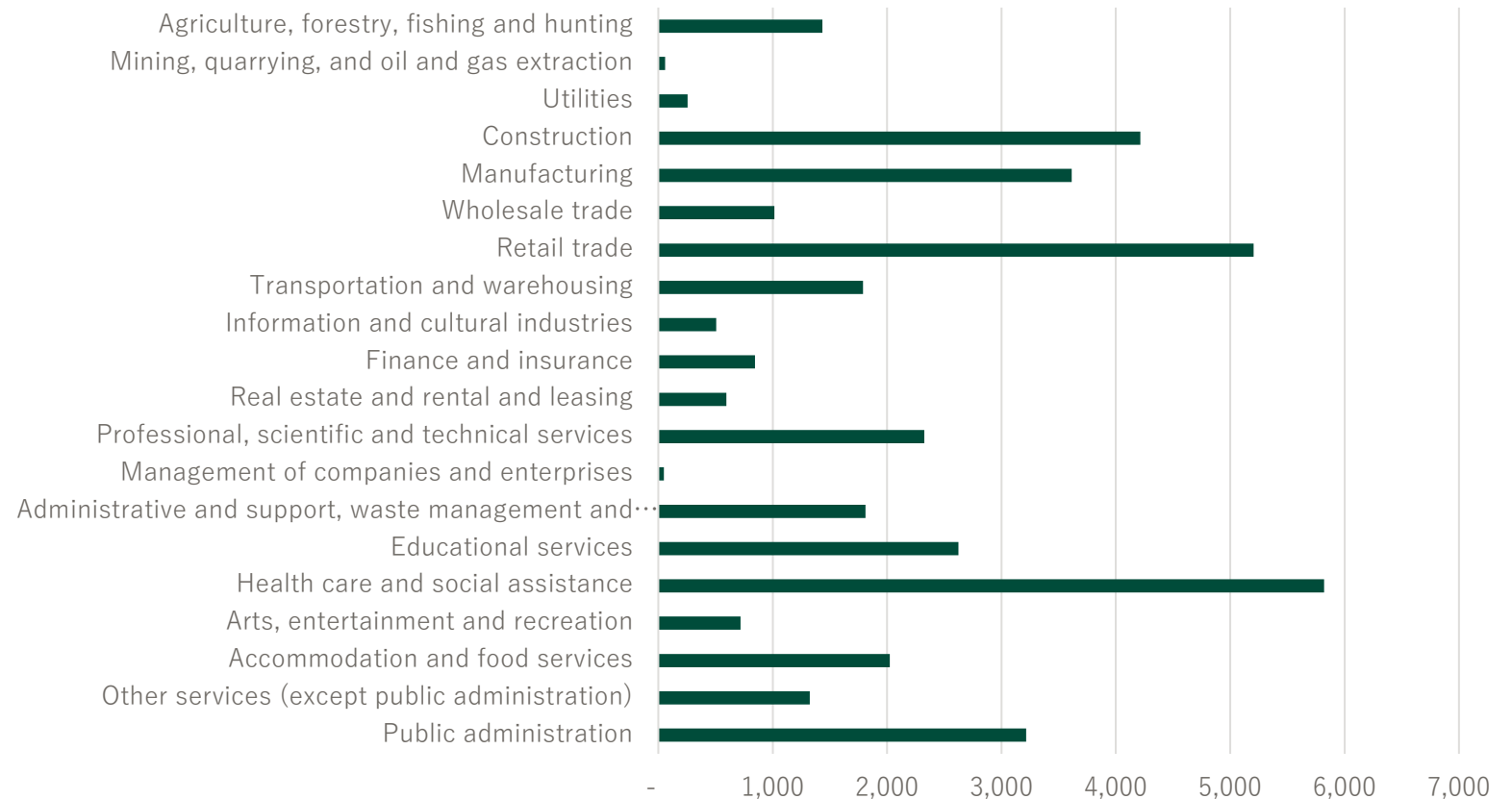
# Employment – Land Use Categories

Employment Category	Economic Sectors	Implications for Planning and Allocation
Population-related <b>(NB. Now referred to as “General Employment”)</b>	Primarily serves local residents (permanent and seasonal): retail, accommodation, food, education, health care, local government, and work-at-home jobs	Generally planned for through community plans focused on residential areas.
Employment area	Manufacturing and related industries	Accommodated primarily in low-rise industrial-type buildings, mostly in business parks and industrial areas.
Rural	Agriculture, small-scale manufacturing and construction, tourism, recreation	Located outside urban land designated for industrial or commercial use

# Diverse Employment Base in CD—Many Institutions, Manufacturers, & Retail Trade in Brockville

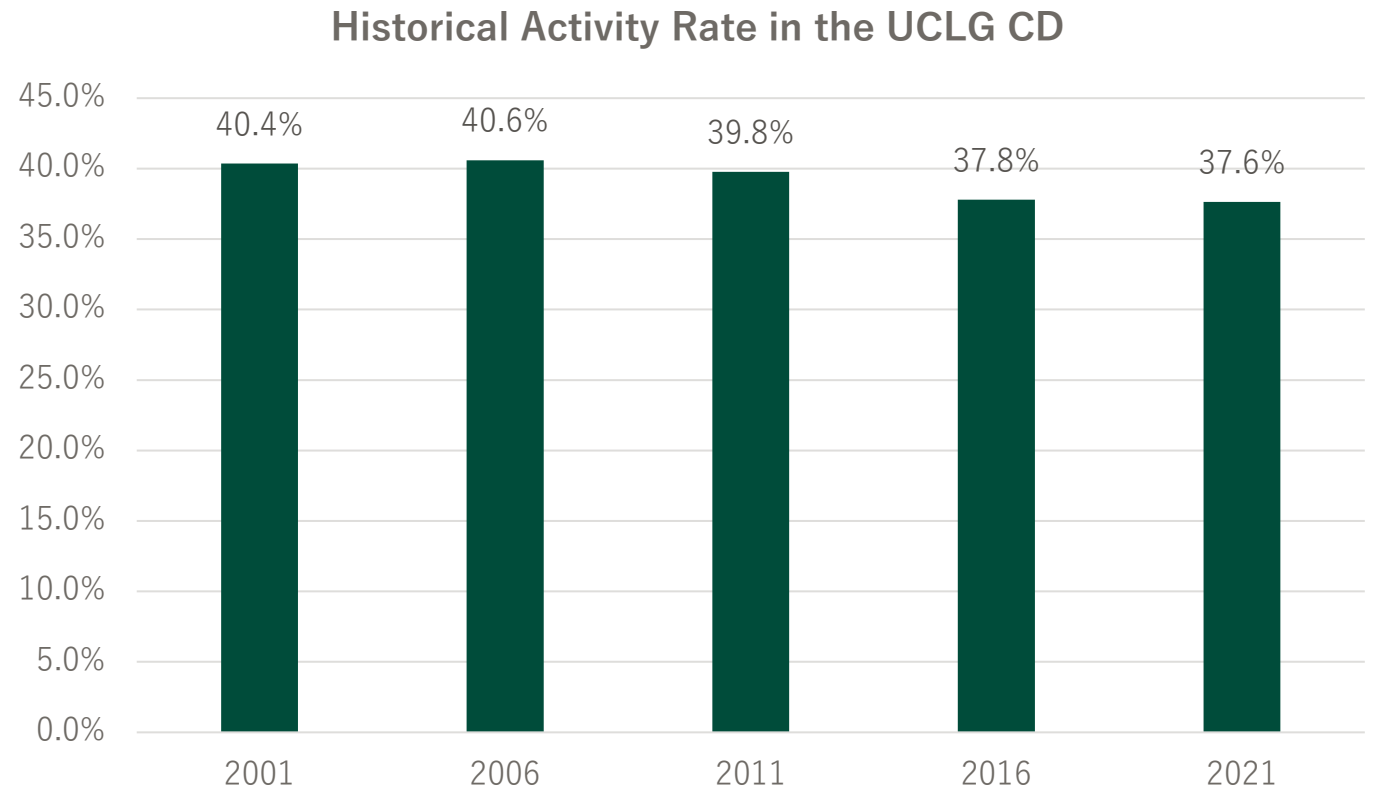
- Retail Trade primarily located in Brockville and North Grenville
- Brockville General Hospital
- Construction employment generally dispersed throughout the Counties

UCLG CD – 2021 Place of Work Employment



# Employment – Historical Activity Rate

- Activity rate an indicator of “completeness” of a community
  - Calculated by dividing the total place of work employment by the Census population
- 2021 data is unreliable as the Census was undertaken during the pandemic



# Commuting Flows in the Census Division

- In 2021:
  - 9,500 residents of Census Division out-commute
    - 3,370 to City of Ottawa
    - 2,235 to Lanark County
      - 1,515 to Smiths Falls
  - 3,700 people in-commute
    - 1,130 people from City of Ottawa
    - 840 from Frontenac County
    - 780 from Stormont, Dundas and Glengarry
- North Grenville
  - 2,000 live and work in North Grenville
  - 300 leave to work elsewhere in the Census Division
  - 2,375 commute outside the Census Division (2,000 to Ottawa)

# Employment Considerations

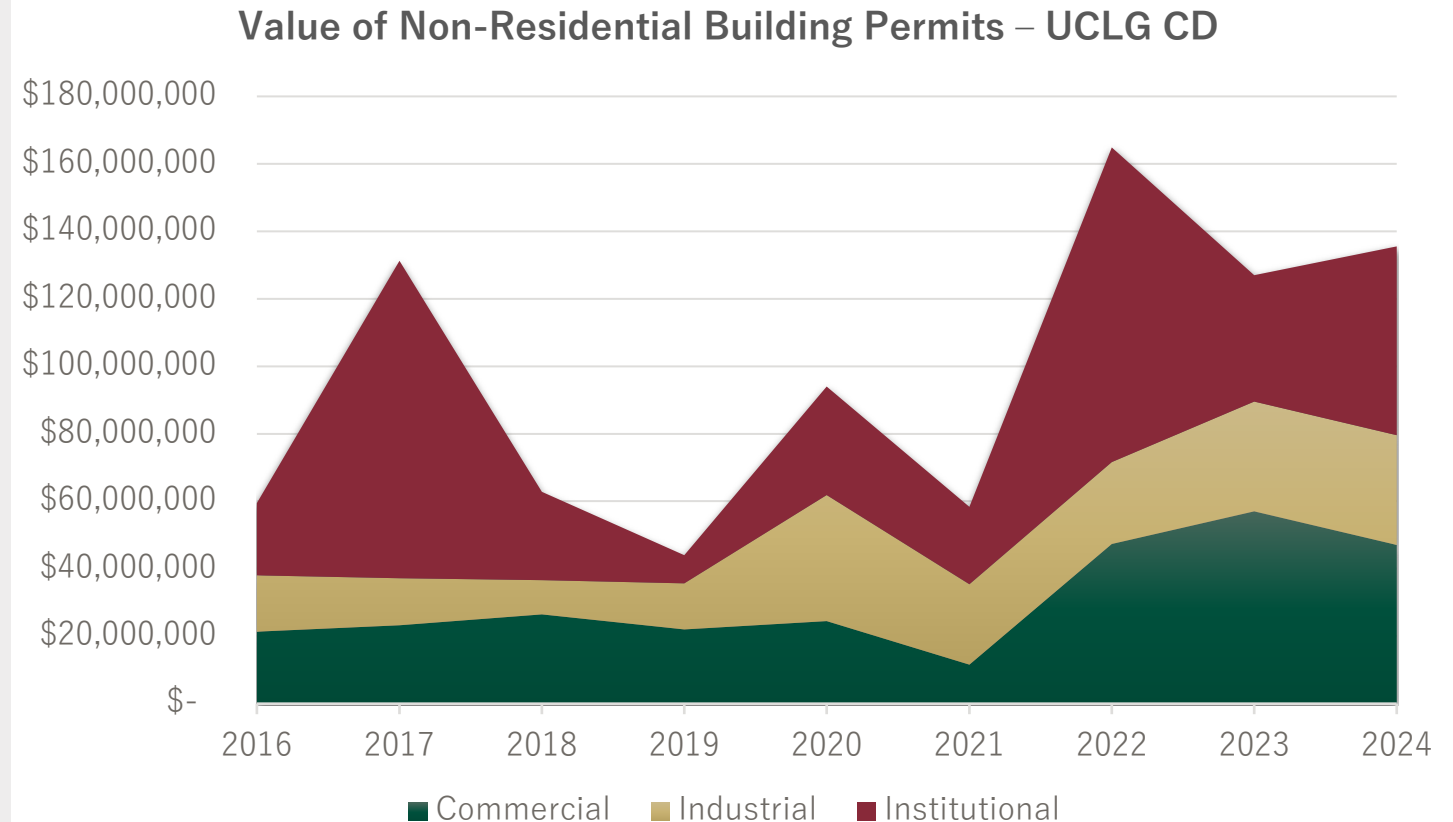
- Current forecast based on:
  - Increased level of “general employment” due to higher population forecast
  - Increased share of rural employment—to discuss
  - Regionally significant employment areas are the location for future employment land employment

# Status/Role of Business Parks and Industrial Lands

- Augusta Industrial Park
- Brockville: John G. Broome Business Park and Western Industrial Park
- Edwardsburgh-Cardinal: Johnstown Industrial Park
- Elizabethtown-Kitley Business Park; Coons Road Industrial Park
- North Grenville Industrial land
- Prescott North End Industrial Park

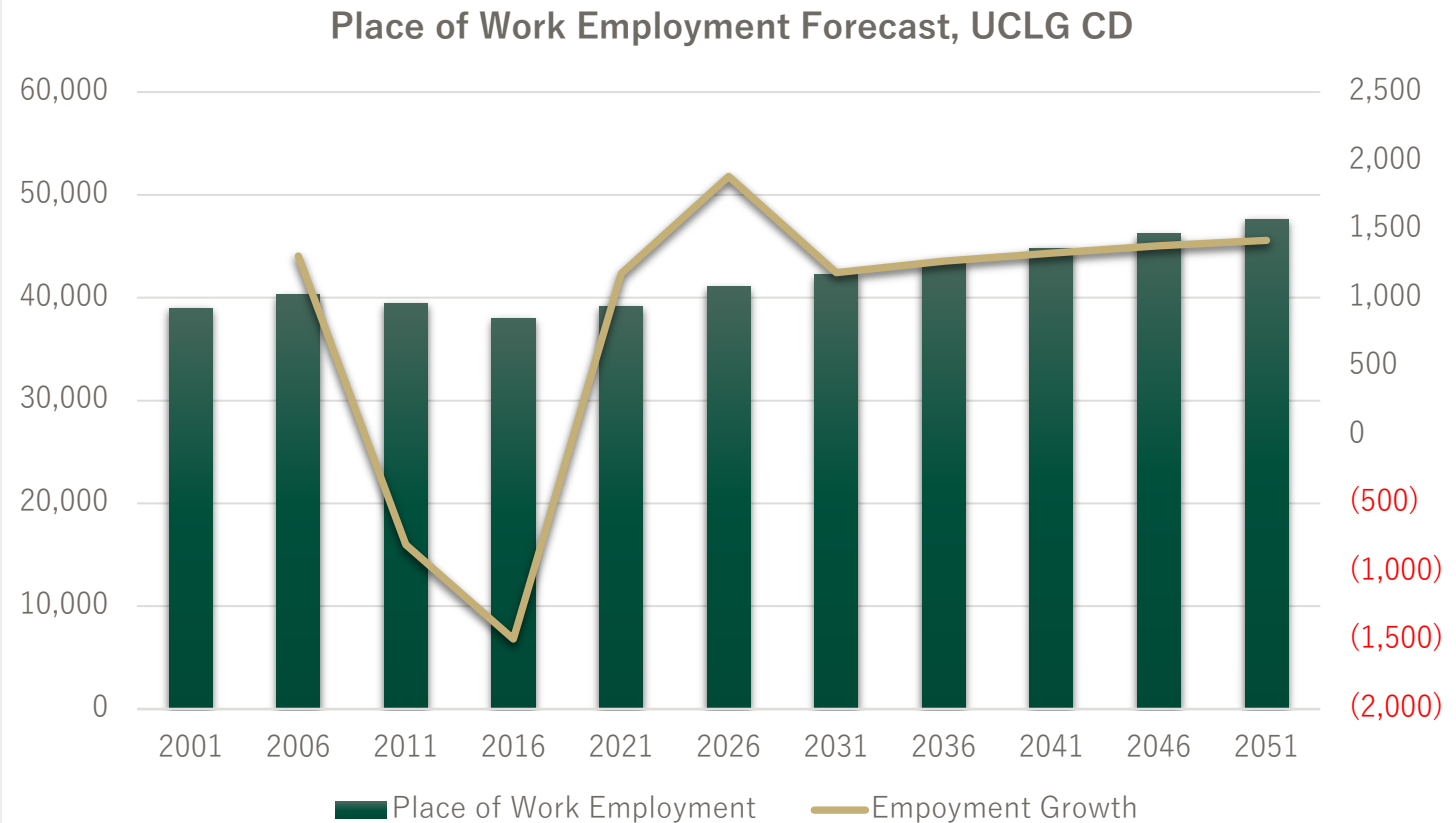
# Employment – Recent Building Permits

- Increased level of commercial building permits since 2022
- PPS 2024 narrows the definition of "employment area" to emphasize manufacturing, warehousing, and related uses



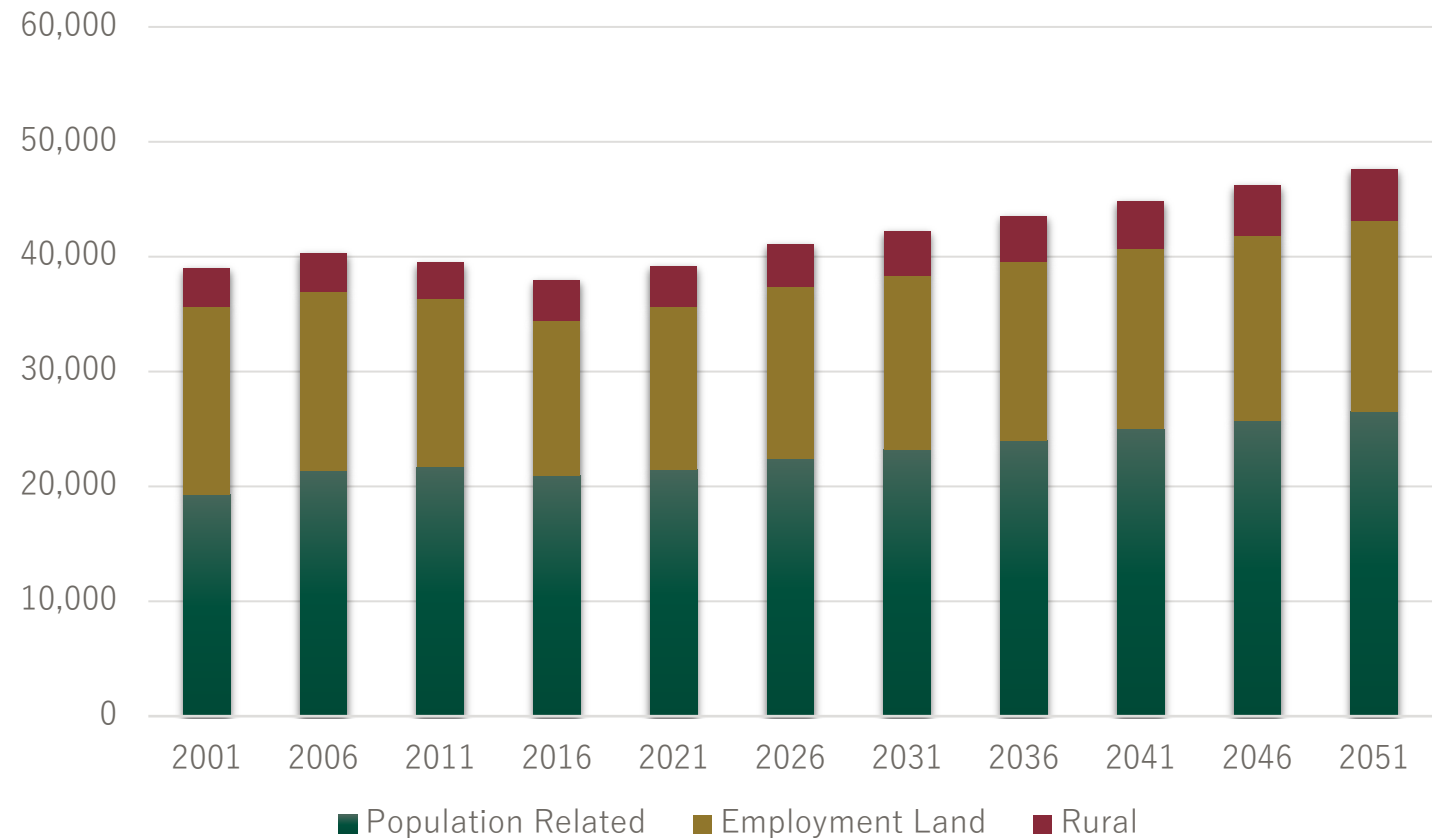
# Employment – Current Outlook

- 2021 employment count is unreliable
- 2026 represents accelerated growth, primarily population related



# Employment – Forecast by Land Use Category

- General (population-related) employment will continue to be the driver of employment growth
- Steady employment land employment growth
- Rural employment to slightly increase in share of overall employment



# Summary of County-Wide Employment Forecast

- Total employment to grow at ~1% annually
- 60% of all employment growth will be general employment
  - ~30% employment land; ~10% rural

UCLG CD	2021 Base	2051 Forecast	2021-2051 Growth
General Employment	21,500	26,500	5,000
Employment Land	14,200	16,600	2,400
Rural	3,500	4,500	1,000
<b>Total Employment</b>	<b>39,200</b>	<b>47,600</b>	<b>8,400</b>

# Understanding the Implications of a “High Growth” Scenario

- Premised on continued high intra-provincial migration
  - Housing affordability
  - Growth plans of other municipalities surrounding Ottawa (e.g. Township of Russell)
  - Ability of Ottawa to accommodate greater range and mix of housing
- Employment growth
  - General employment will be higher under high scenarios
  - Other factors at play in order to secure range of jobs locally for complete communities (e.g. employment land supply)

# Next Steps

- One-on-one meetings with area municipalities
- Finalize UCLG CD Forecast Scenarios to 2051
- Municipal Allocations
- Land Needs Assessment – Residential and Employment
  - Proposed Provincial guidelines
  - Settlement Area Boundary Expansions
  - Policy review