

Technical Advisory Group (TAG)

United Counties of Leeds and Grenville Growth Management Strategy



November 10, 2025 (Revised on December 8, 2025)

HEMSON

Our Focus Today Is...

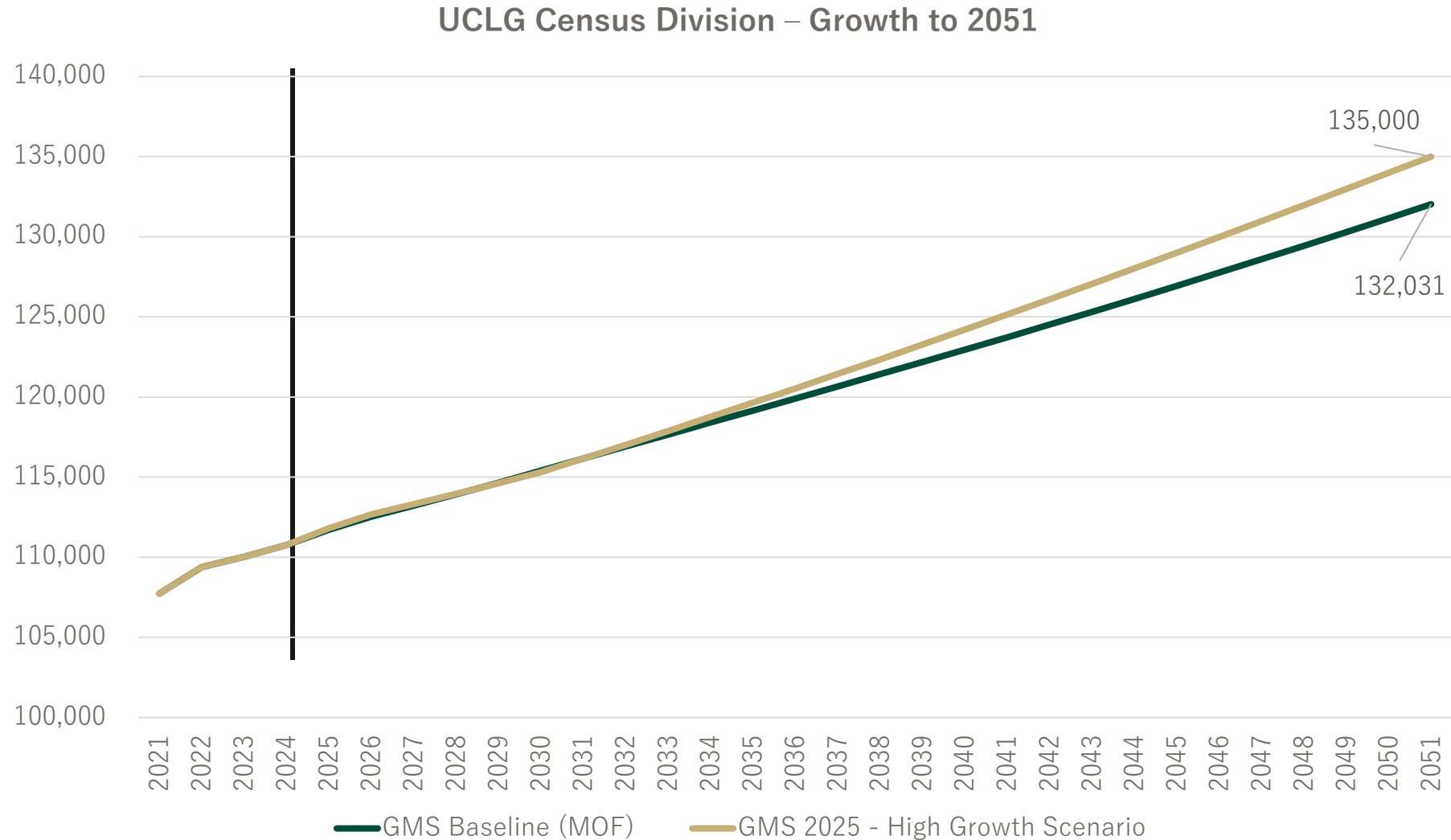
- Recap of Census Division growth
- Local municipal growth forecasts to 2051
 - Population
 - Households and housing
 - Employment
- Residential and employment land needs
- Next Steps

Recap of Counties-wide Forecasts

Recap: GMS Forecast Scenarios

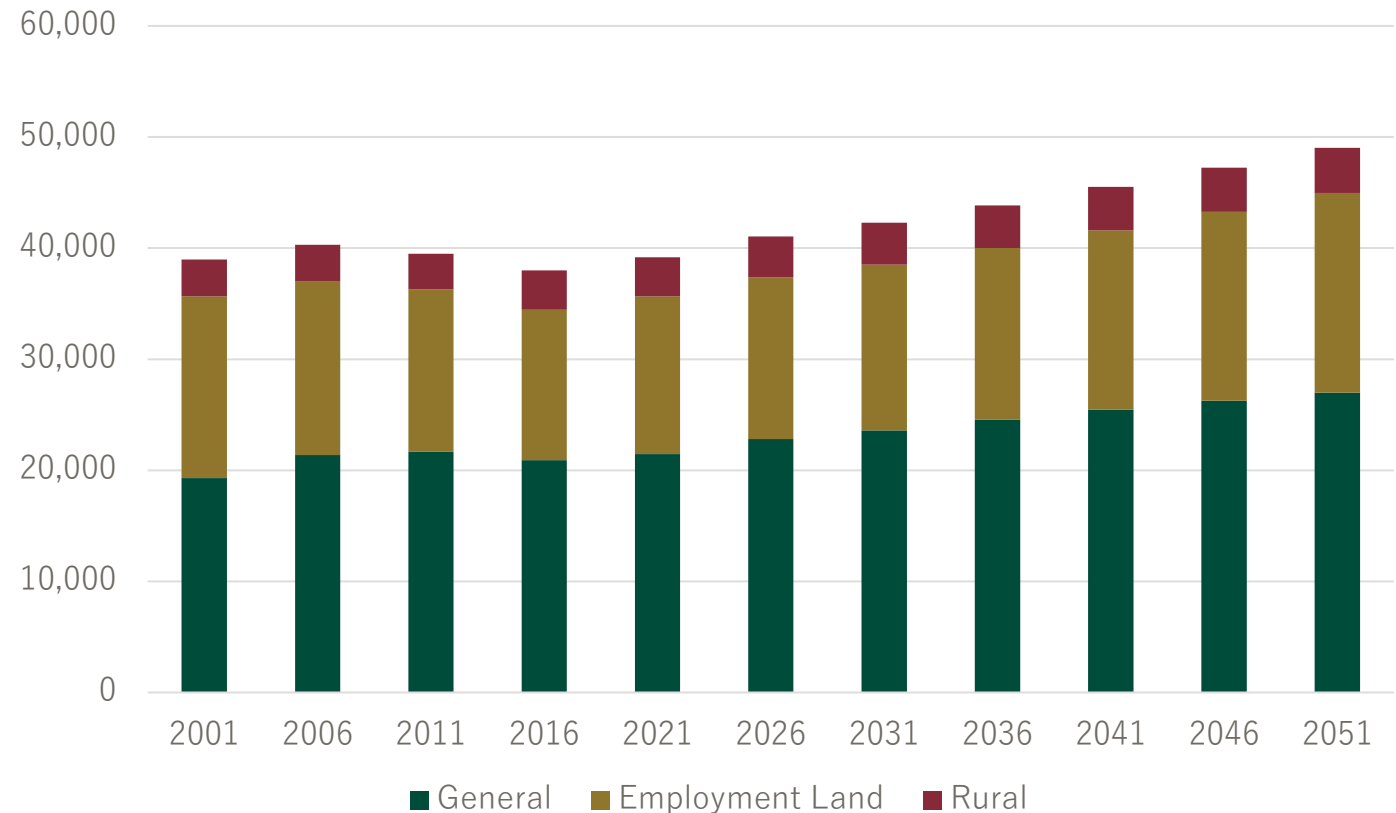
Annual Population Growth 2021-2051

- GMS Baseline (Ministry of Finance): 810
- GMS High Growth Scenario: 910



Recap: GMS Employment Forecast

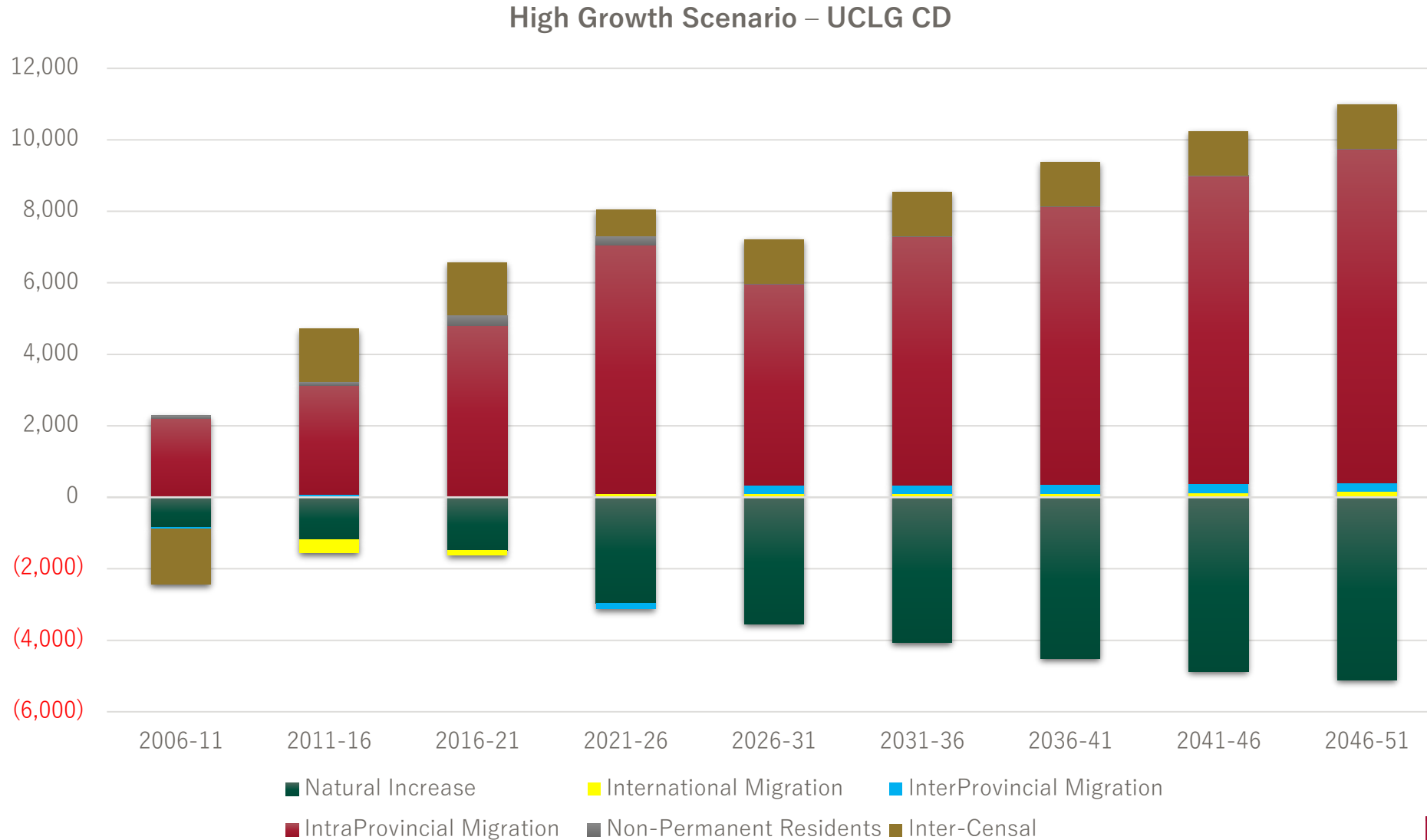
- “General” employment will continue to be the driver of employment growth
- Steady employment land employment growth
- Rural employment to generally maintain share of overall employment



Understand Implications of the “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
 - Other factors at play in order to secure range of jobs locally for complete communities

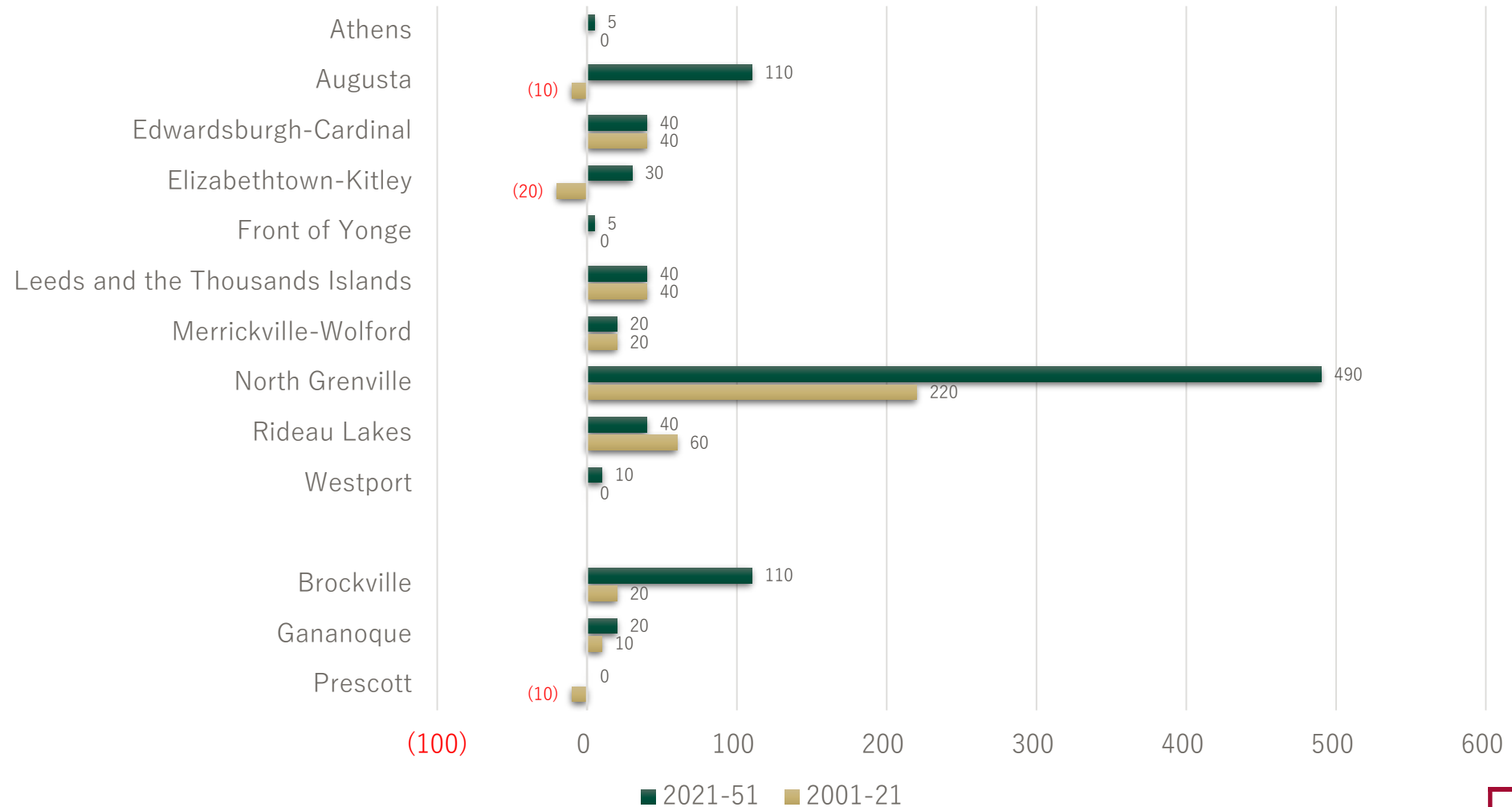
Recap: Components of Population Growth in the CD



Growth by Local Municipality

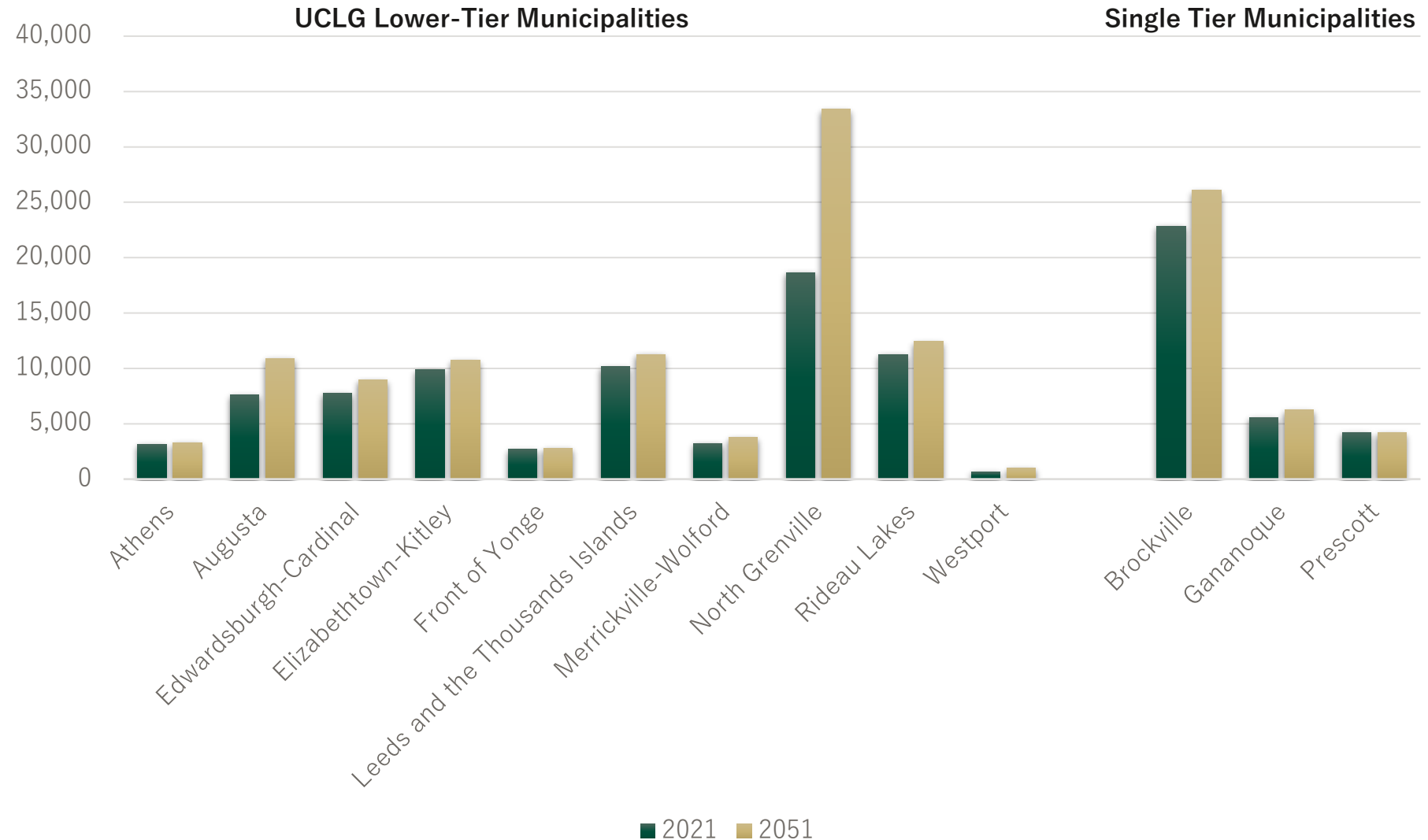
UCLG CD Population Growth

Average Annual Population Growth – Historical vs Forecast



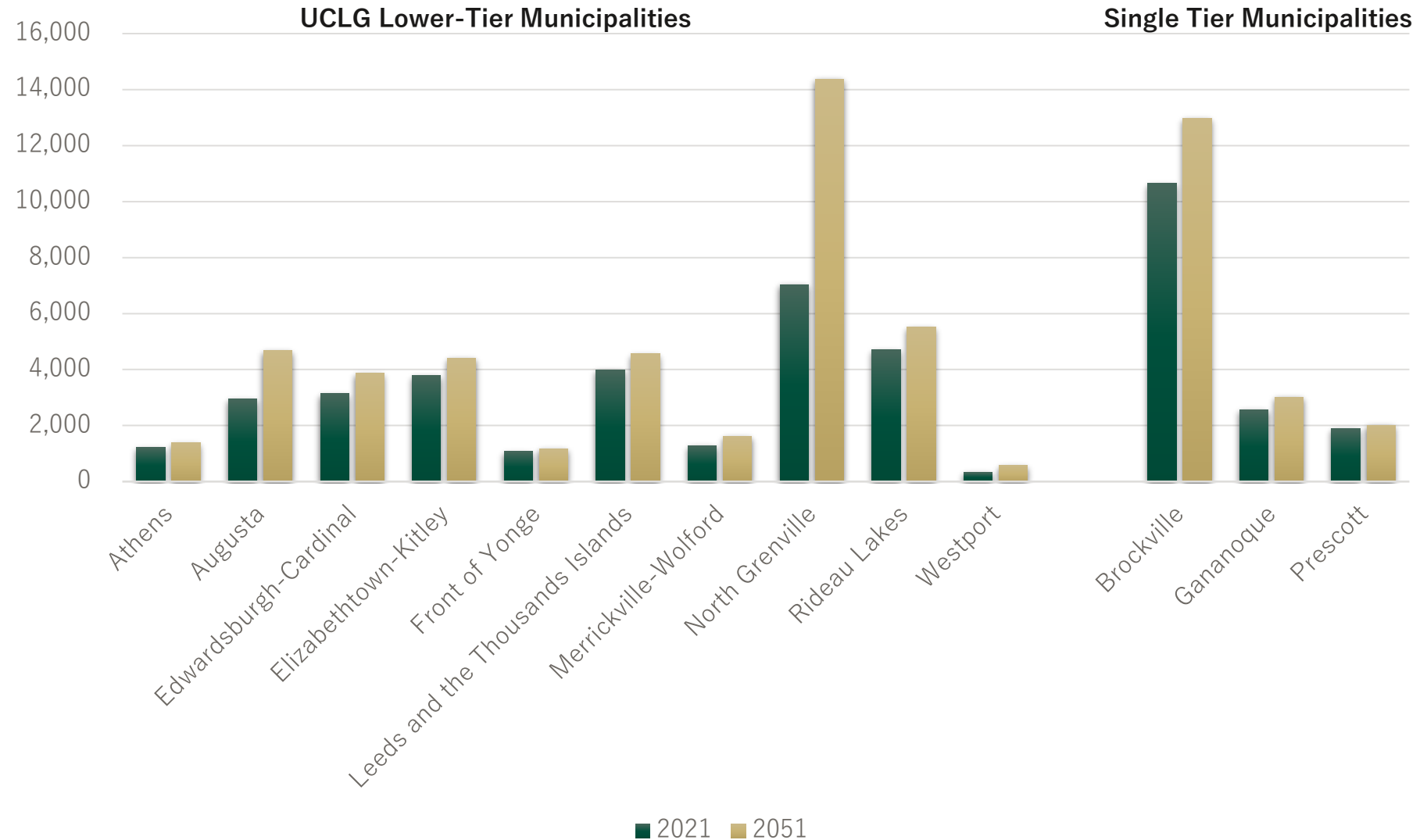
UCLG Census Division Population Allocations

Municipality	Population Growth, 2021-51	Share of CD Growth
Athens	140	1%
Augusta	3,250	12%
Edwardsburgh-Cardinal	1,150	4%
Elizabethtown-Kitley	860	3%
Front of Yonge	100	0%
Leeds and the Thousands Islands	1,110	4%
Merrickville-Wolford	520	2%
North Grenville	14,740	54%
Rideau Lakes	1,170	4%
Westport	350	1%
Brockville	3,230	12%
Gananoque	690	3%
Prescott	(40)	0%



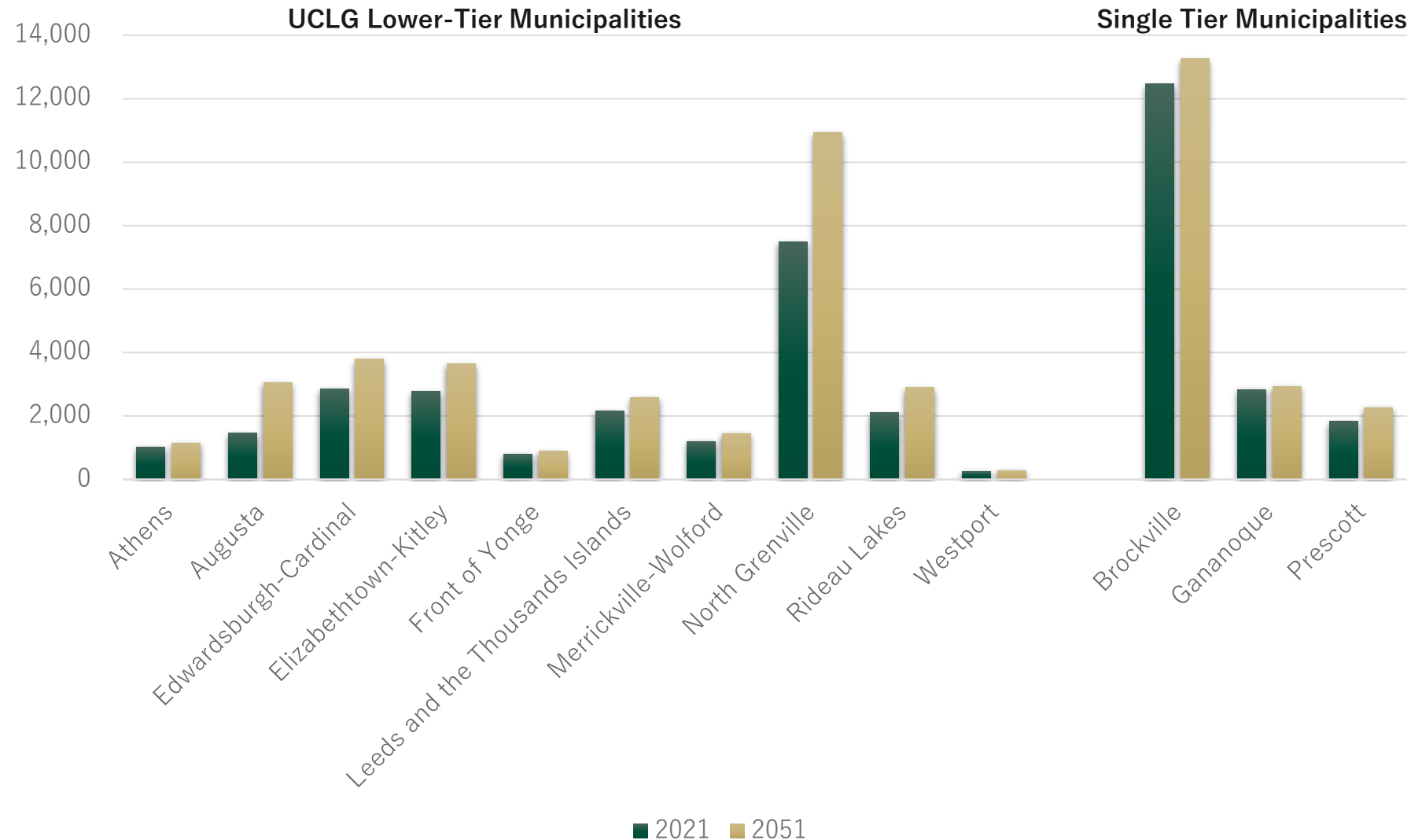
UCLG Census Division Household Allocations

Municipality	Household Growth, 2021-51	Share of CD Growth
Athens	160	1%
Augusta	1,730	11%
Edwardsburgh-Cardinal	730	5%
Elizabethtown-Kitley	620	4%
Front of Yonge	90	1%
Leeds and the Thousands Islands	570	4%
Merrickville-Wolford	330	2%
North Grenville	7,330	47%
Rideau Lakes	820	5%
Westport	250	2%
Brockville	2,330	15%
Gananoque	450	3%
Prescott	120	1%



UCLG Census Division Employment Allocations

Municipality	Employment Growth, 2021-51	Share of CD Growth
Athens	130	1%
Augusta	1,590	16%
Edwardsburgh-Cardinal	930	9%
Elizabethtown-Kitley	870	9%
Front of Yonge	90	1%
Leeds and the Thousands Islands	420	4%
Merrickville-Wolford	250	3%
North Grenville	3,450	35%
Rideau Lakes	800	8%
Westport	20	0%
Brockville	800	8%
Gananoque	100	1%
Prescott	440	4%



Residential Land Needs Assessment

- Housing growth is allocated to:
 - Intensification in urban settlement areas
 - Designated Greenfield Areas in urban settlement areas
 - Rural settlement areas
- Base year is 2021:
 - However, building permits issued between 2021 and year-to-date 2025 have been accounted for in the short-term forecast
- Development pipeline and vacant land supply have been developed through County and Municipal data sources

Proposed Updates to the Projection Methodology Guideline

- Draft Guideline sets out two approaches for allocating a municipality's share of projected growth within its Census Division
 - **Method A** – allocation based on a municipality's current share of the Census Division population
 - **Method B** – allocation based on a municipality's share of population growth within the Census Division over the most recent 10-year period (ideally a consecutive five-year interval)

MOF Projection vs County Forecast

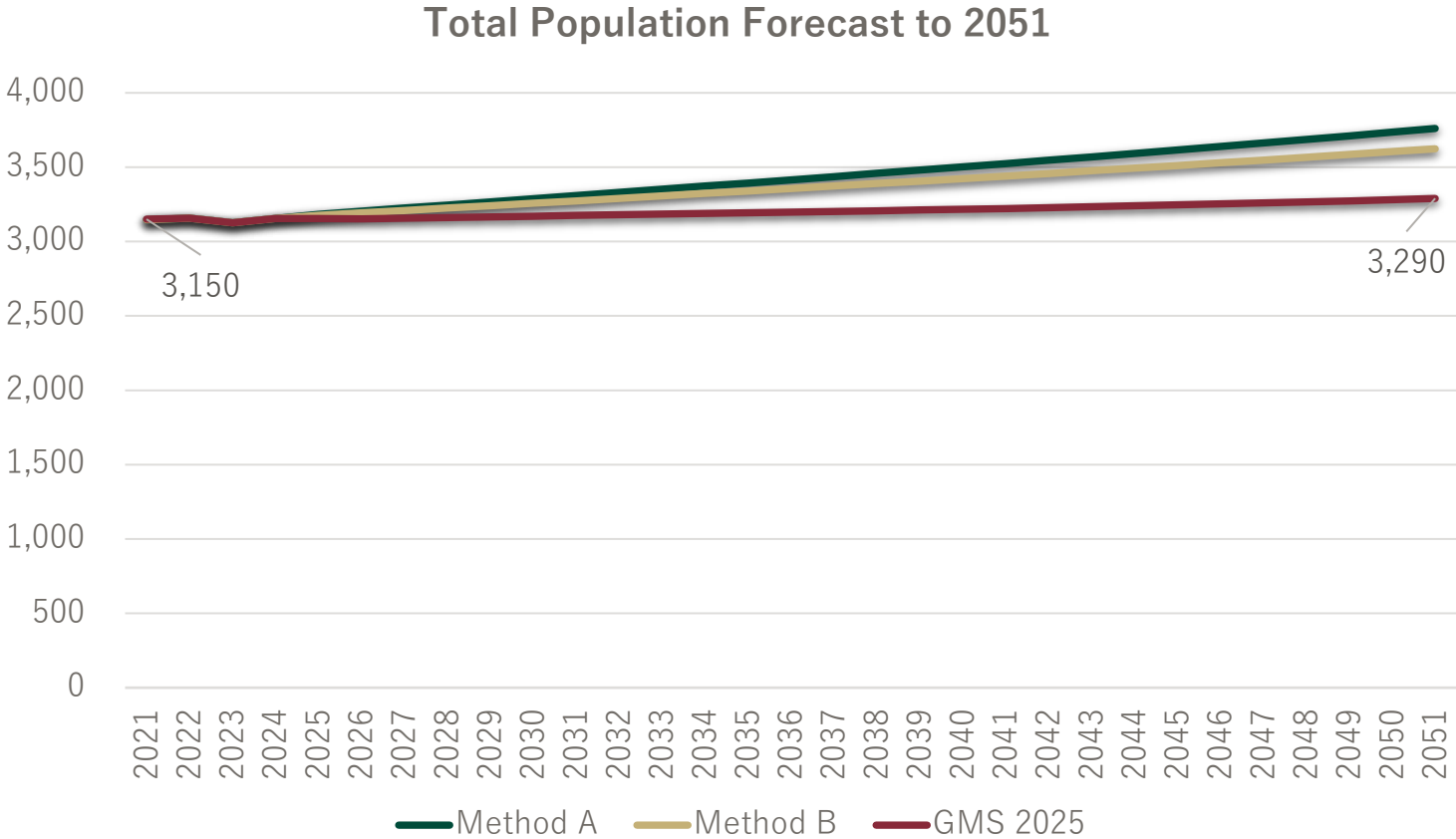
Projections and forecasts: A projection extrapolates present trends (e.g., fertility, mortality, and migration) to a future state (e.g., population) based on the assumption that the trends would continue. A projection is neutral and does not consider how changes in assumptions or potential uncertainty 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

Municipal Allocation: Athens

Between 2021 and 2051
Athens will:

- 1. Add 140 net new residents
- 2. Develop 160 new residential units
- 3. Add 130 net new jobs



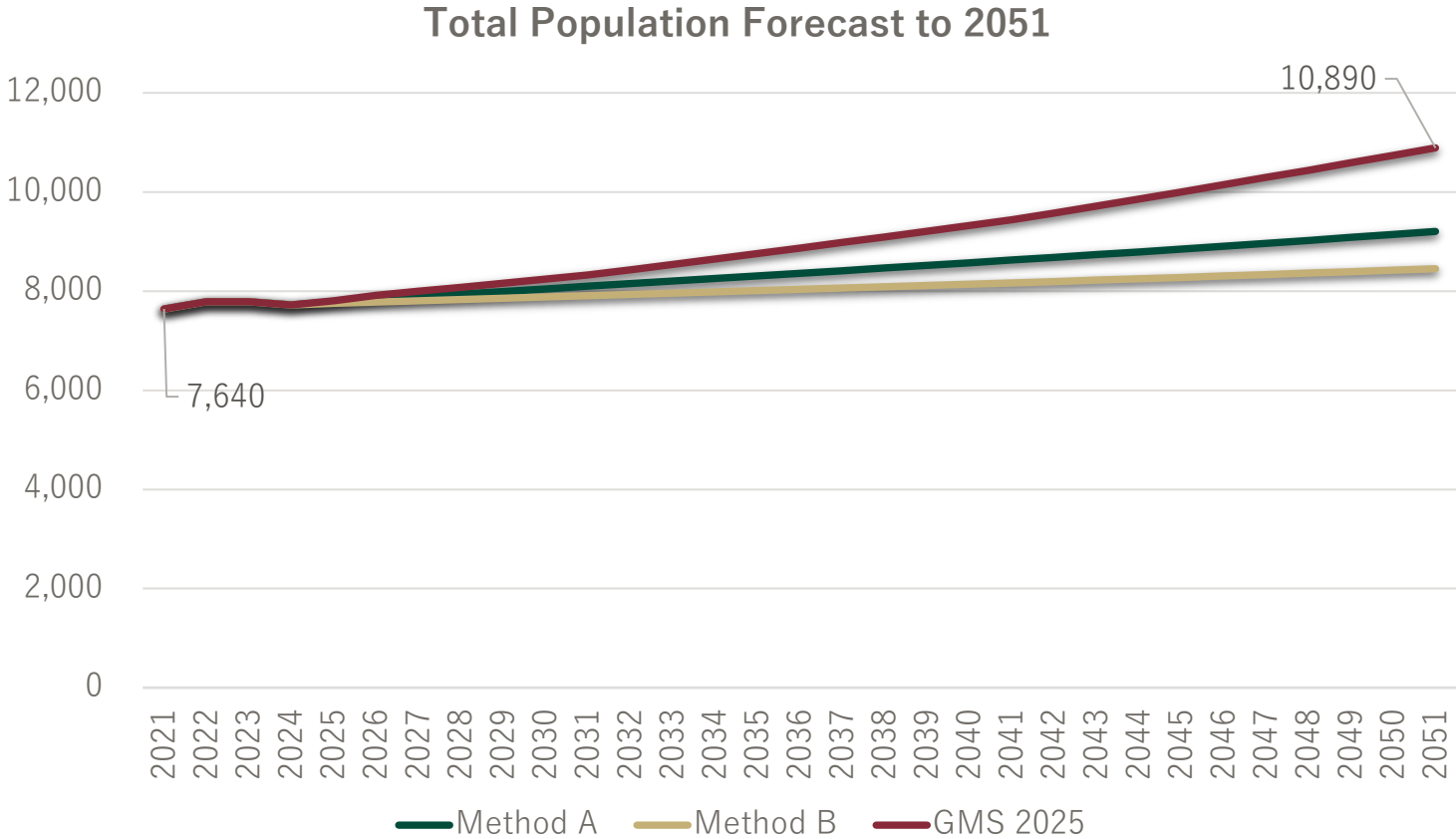
Residential Land Needs: Athens

Athens	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	141	0	4	145
<i>Rural</i>	<i>48</i>	<i>0</i>	<i>0</i>	<i>48</i>
<i>Intensification within Settlement Areas</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
<i>Greenfield Land within Settlement Areas</i>	<i>93</i>	<i>0</i>	<i>4</i>	<i>97</i>
Settlement Area Land Need (units)	93	0	4	97
Settlement Area Land Need (gross ha)	6.20	0.00	0.13	6.33
Settlement Area Land Supply (gross ha)				26.49
Surplus/Deficit - Settlement Area Supply				20.16

Municipal Allocation: Augusta

Between 2021 and 2051
Augusta will:

- 1. Add 3,250 net new residents
- 2. Develop 1,730 new residential units
- 3. Add 1,590 net new jobs



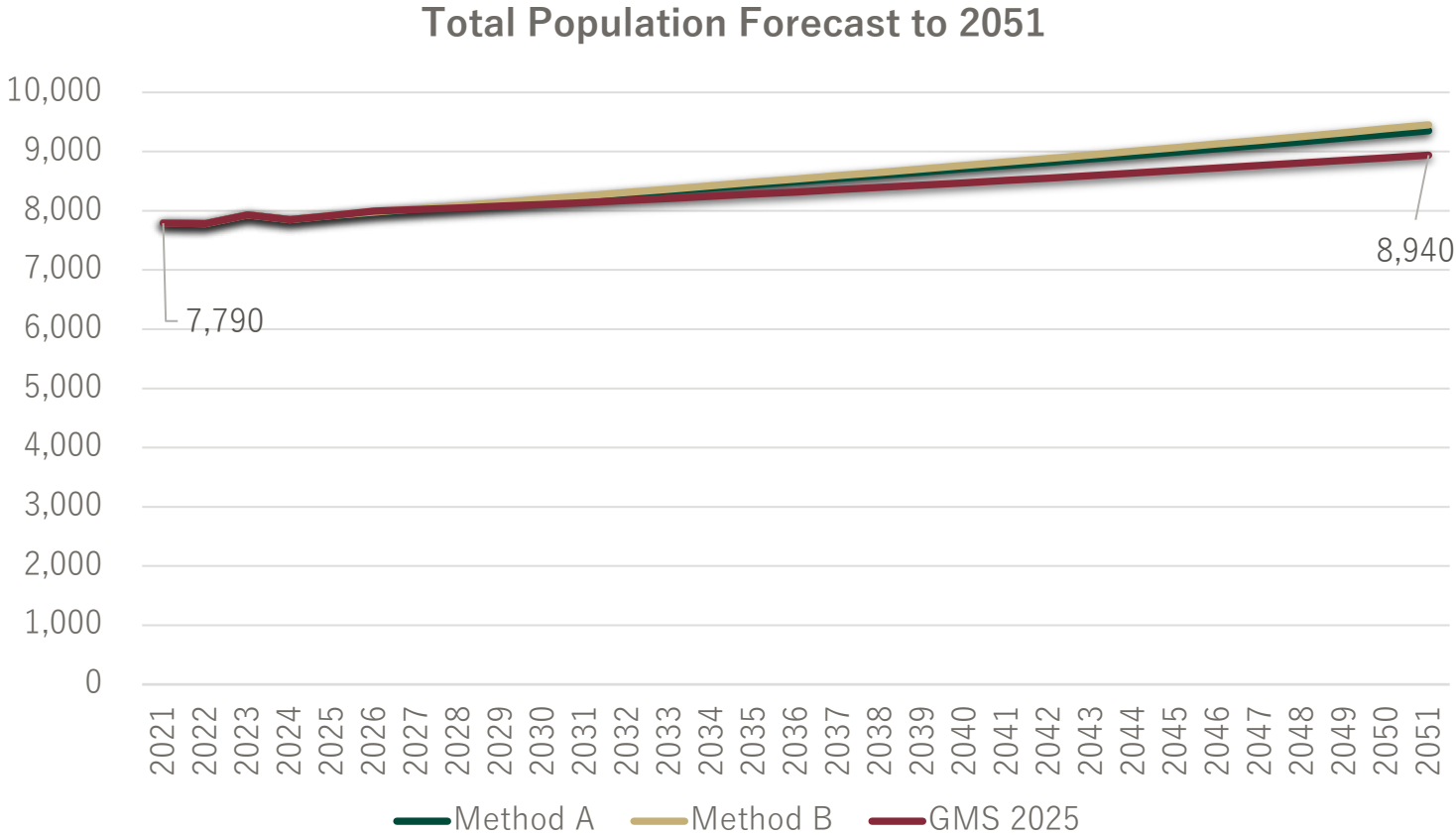
Residential Land Needs: Augusta

Augusta	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	1,062	192	303	1,557
<i>Rural</i>	<i>260</i>	<i>0</i>	<i>0</i>	<i>260</i>
<i>Intensification within Settlement Areas</i>	<i>13</i>	<i>117</i>	<i>130</i>	<i>260</i>
<i>Greenfield Land within Settlement Areas</i>	<i>790</i>	<i>75</i>	<i>173</i>	<i>1,038</i>
Settlement Area Land Need (units)	790	75	173	1,038
Settlement Area Land Need (gross ha)	52.64	4.18	5.78	62.59
Settlement Area Land Supply (gross ha)				159.50
Surplus/Deficit - Settlement Area Supply				96.91

Municipal Allocation: Edwardsburgh-Cardinal

Between 2021 and 2051
Edwardsburgh-Cardinal will:

- 1. Add 1,150 net new residents
- 2. Develop 730 new residential units
- 3. Add 930 net new jobs



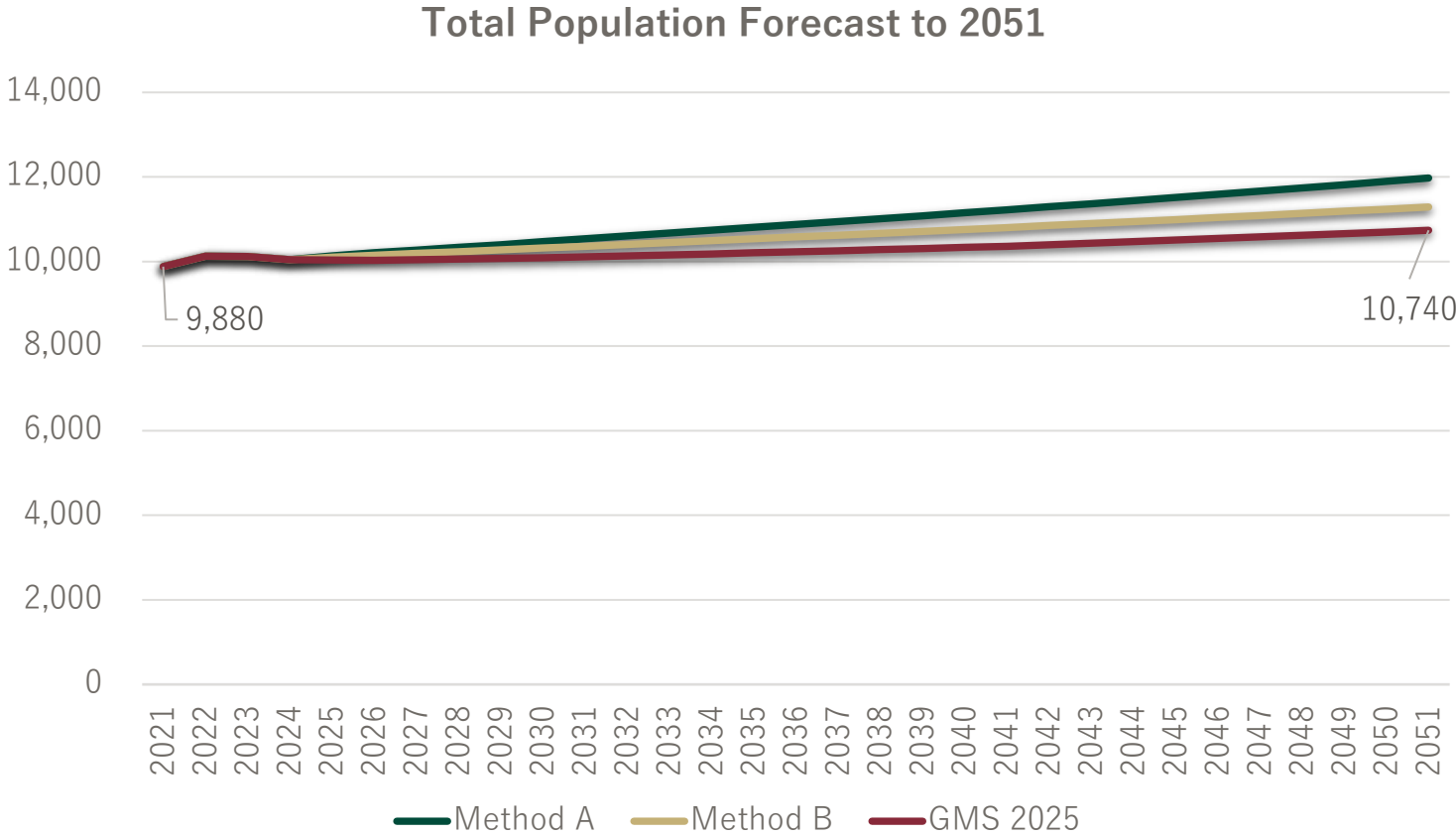
Residential Land Needs: Edwardsburgh-Cardinal

Edwardsburgh-Cardinal	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	471	5	161	637
<i>Rural</i>	<i>91</i>	<i>0</i>	<i>0</i>	<i>91</i>
<i>Intensification within Settlement Areas</i>	<i>11</i>	<i>5</i>	<i>94</i>	<i>110</i>
<i>Greenfield Land within Settlement Areas</i>	<i>369</i>	<i>0</i>	<i>67</i>	<i>436</i>
Settlement Area Land Need (units)	369	0	67	436
Settlement Area Land Need (gross ha)	24.59	0.00	2.25	26.84
Settlement Area Land Supply (gross ha)				89.02
Surplus/Deficit - Settlement Area Supply				62.18

Municipal Allocation: Elizabethtown-Kitley

Between 2021 and 2051
Elizabethtown-Kitley will:

1. Add 860 net new residents
2. Develop 620 new residential units
3. Add 870 net new jobs



Residential Land Needs: Elizabethtown-Kitley

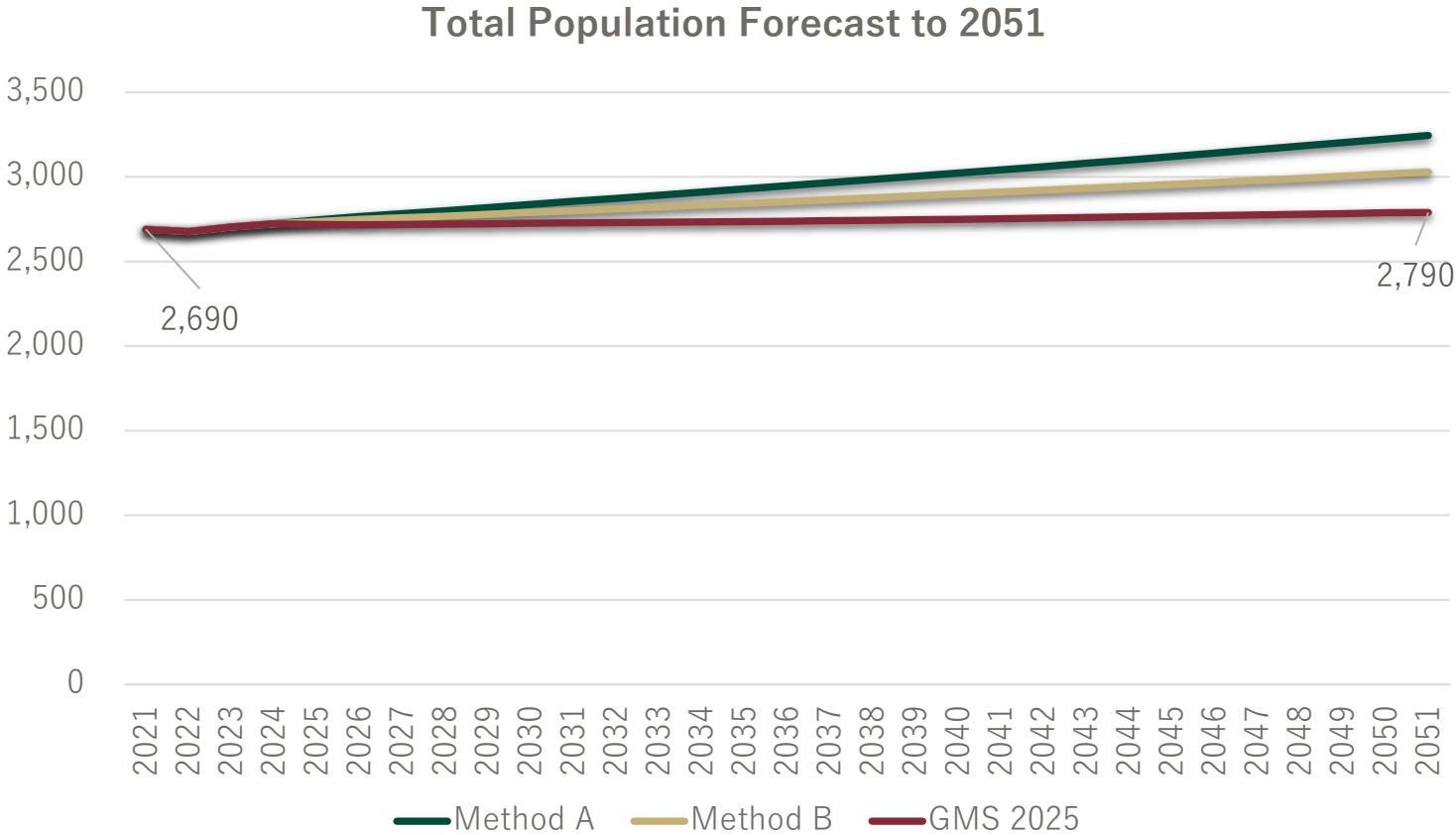
Elizabethtown-Kitley	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	513	5	0	518
<i>Rural</i>	<i>279</i>	<i>0</i>	<i>0</i>	<i>310</i>
<i>Intensification within Settlement Areas</i>	<i>88</i>	<i>5</i>	<i>0</i>	<i>93</i>
<i>Greenfield Land within Settlement Areas</i>	<i>146</i>	<i>0</i>	<i>0</i>	<i>146</i>
Settlement Area Land Need (units)	146	0	0	146
Settlement Area Land Need (gross ha)	9.73	0.00	0.00	9.73
Settlement Area Land Supply (gross ha)				33.76
Surplus/Deficit - Settlement Area Supply				24.03

Note: For this table, Settlement Area includes development in the Special Campus Mixed-Use Lands.

Municipal Allocation: Front of Yonge

Between 2021 and 2051
Front of Yonge will:

- 1. Add 100 net new residents
- 2. Develop 90 new residential units
- 3. Add 90 net new jobs



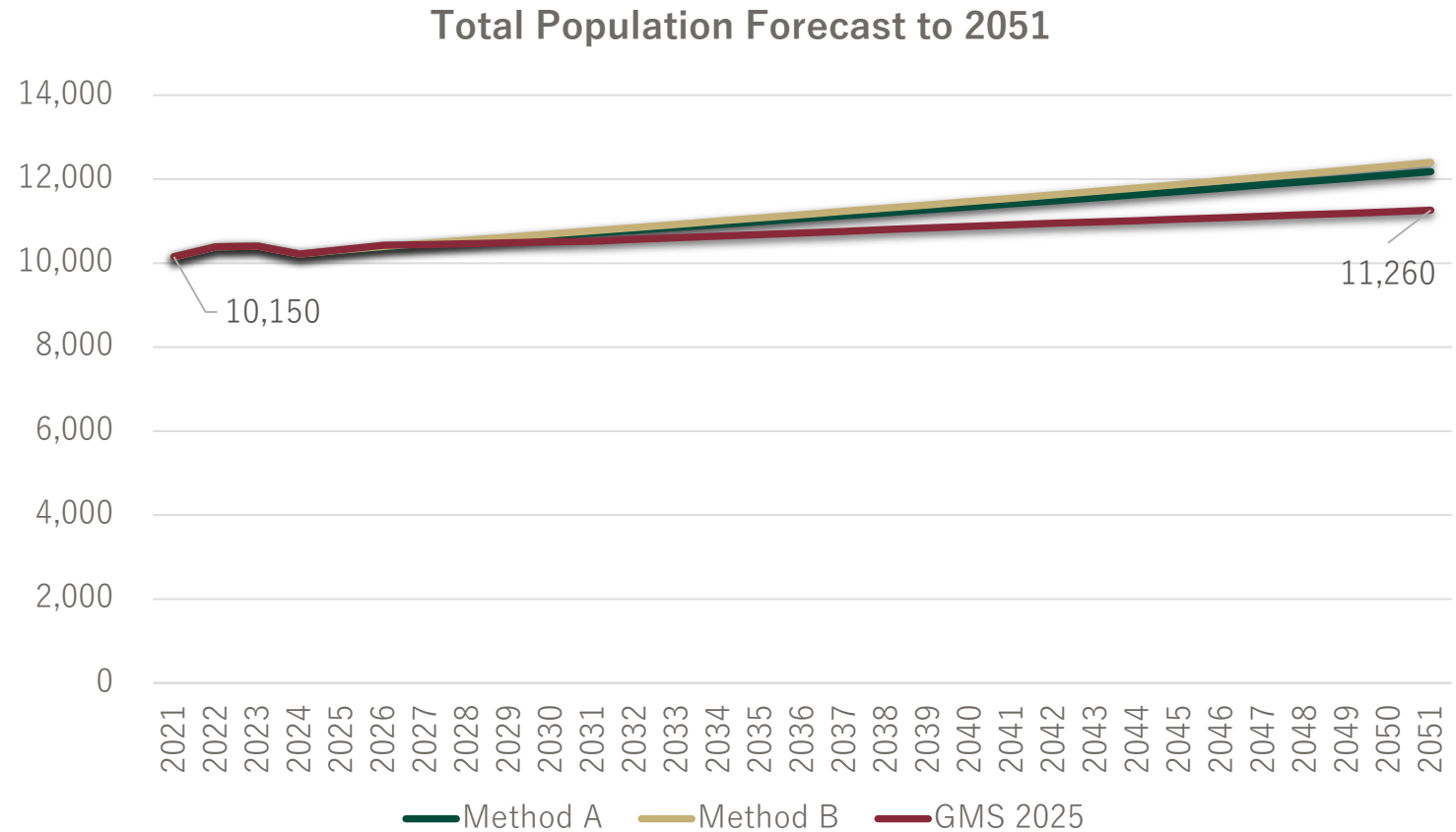
Residential Land Needs: Front of Yonge

Front of Yonge	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	74	0	0	74
<i>Rural</i>	<i>45</i>	<i>0</i>	<i>0</i>	<i>45</i>
<i>Intensification within Settlement Areas</i>	<i>14</i>	<i>0</i>	<i>0</i>	<i>14</i>
<i>Greenfield Land within Settlement Areas</i>	<i>16</i>	<i>0</i>	<i>0</i>	<i>16</i>
Settlement Area Land Need (units)	16	0	0	16
Settlement Area Land Need (gross ha)	1.03	0.00	0.00	1.03
Settlement Area Land Supply (gross ha)				14.12
Surplus/Deficit - Settlement Area Supply				13.08

Municipal Allocation: Leeds and the Thousands Islands

Between 2021 and 2051
Leeds and the Thousands Islands will:

1. Add 1,110 net new residents
2. Develop 570 new residential units
3. Add 420 net new jobs



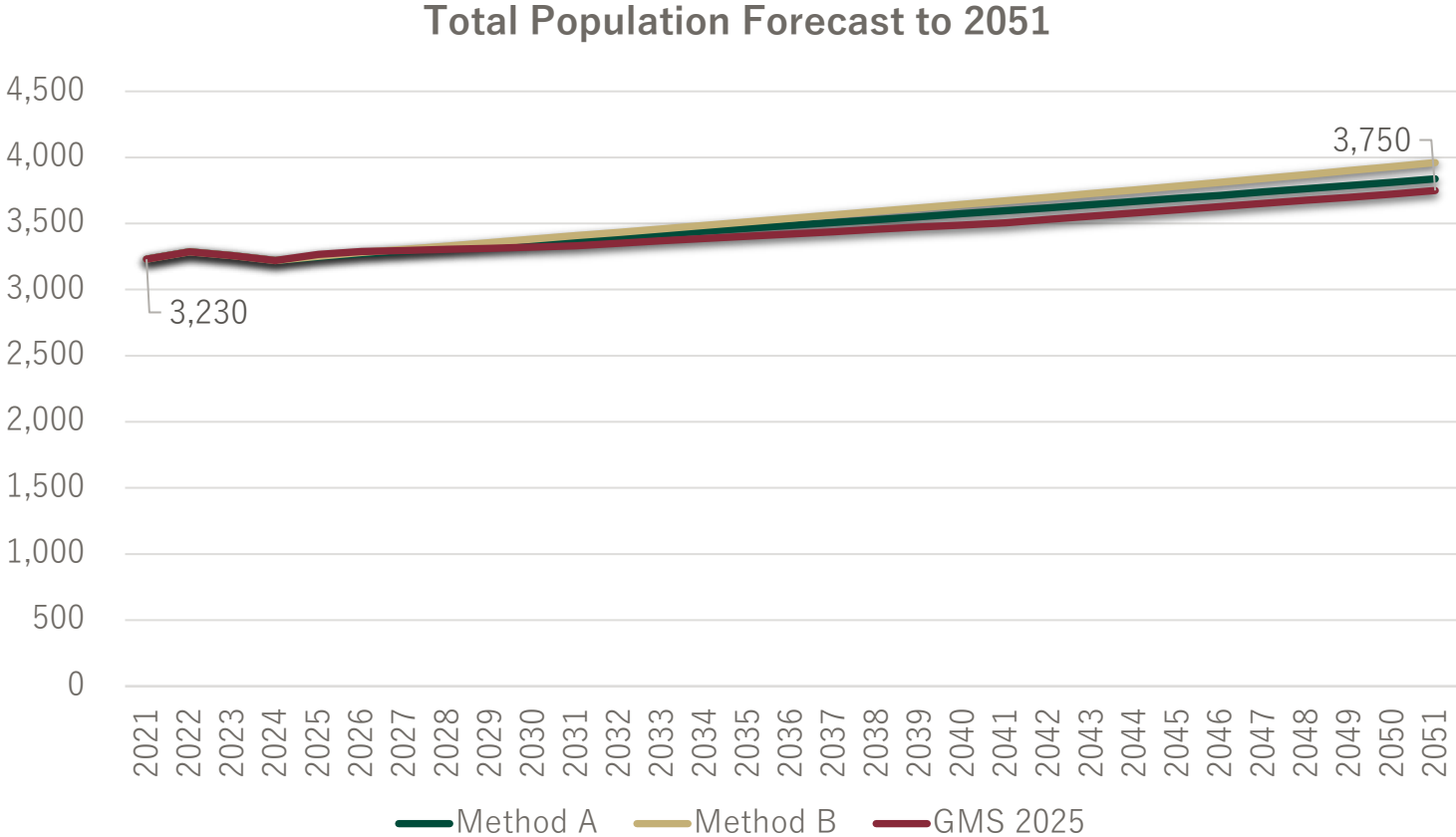
Residential Land Needs: Leeds and the Thousands Islands

Leeds and the Thousand Islands	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	416	5	5	426
<i>Rural</i>	<i>171</i>	<i>0</i>	<i>0</i>	<i>171</i>
<i>Intensification within Settlement Areas</i>	<i>76</i>	<i>5</i>	<i>5</i>	<i>86</i>
<i>Greenfield Land within Settlement Areas</i>	<i>169</i>	<i>0</i>	<i>0</i>	<i>170</i>
Settlement Area Land Need (units)	169	0	0	170
Settlement Area Land Need (gross ha)	11.29	0.00	0.00	11.30
Settlement Area Land Supply (gross ha)				50.10
Surplus/Deficit - Settlement Area Supply				38.81

Municipal Allocation: Merrickville-Wolford

Between 2021 and 2051
Merrickville-Wolford will:

- 1. Add 520 net new residents
- 2. Develop 330 new residential units
- 3. Add 250 net new jobs



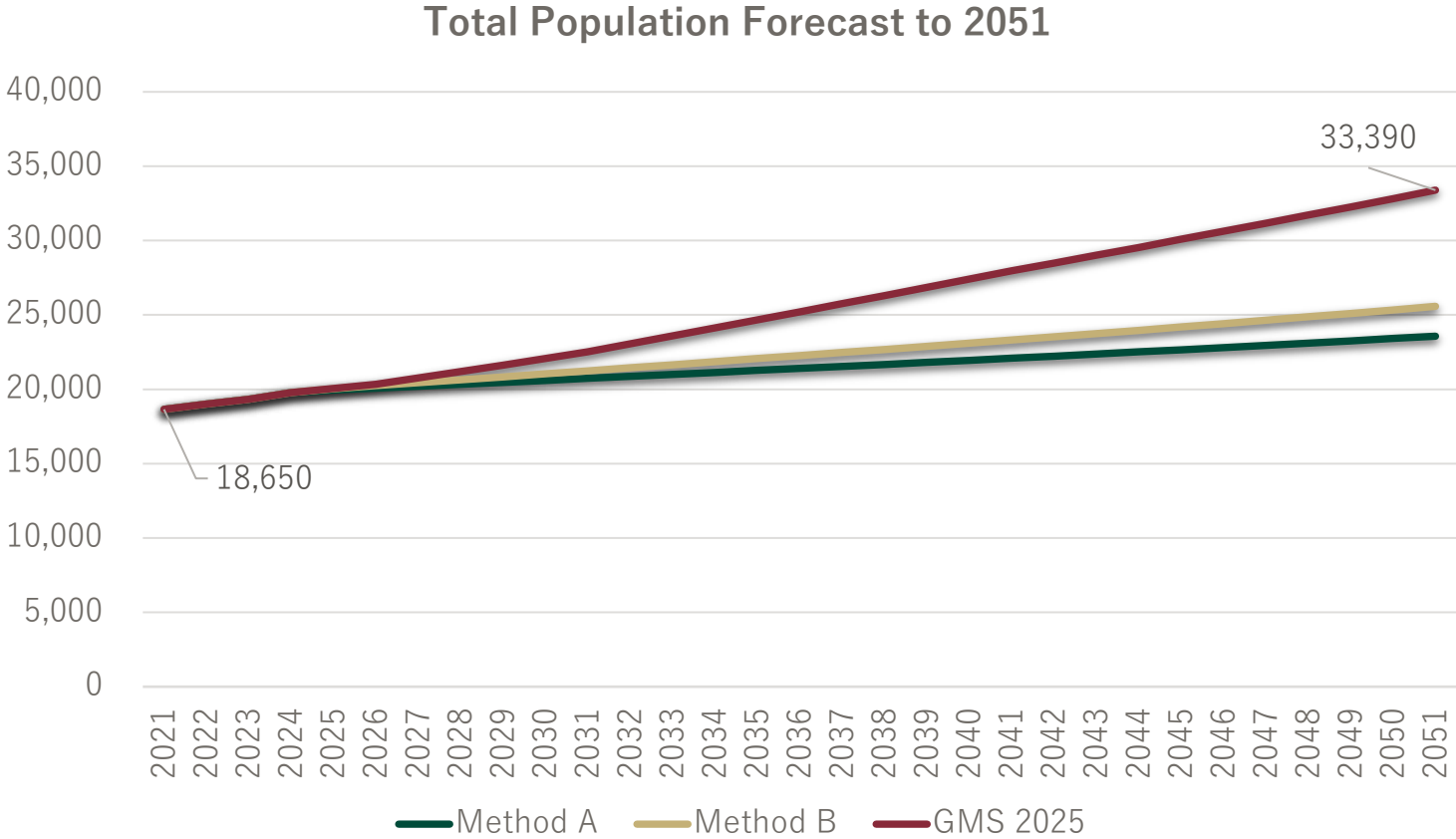
Residential Land Needs: Merrickville-Wolford

Merrickville-Wolford	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	193	12	47	252
<i>Rural</i>	<i>132</i>	<i>0</i>	<i>0</i>	<i>132</i>
<i>Intensification within Settlement Areas</i>	<i>0</i>	<i>12</i>	<i>37</i>	<i>50</i>
<i>Greenfield Land within Settlement Areas</i>	<i>61</i>	<i>0</i>	<i>10</i>	<i>71</i>
Settlement Area Land Need (units)	61	0	10	71
Settlement Area Land Need (gross ha)	4.04	0.00	0.33	4.37
Settlement Area Land Supply (gross ha)				59.12
Surplus/Deficit - Settlement Area Supply				54.75

Municipal Allocation: North Grenville

Between 2021 and 2051
North Grenville will:

- 1. Add 14,740 net new residents
- 2. Develop 7,330 new residential units
- 3. Add 3,450 net new jobs



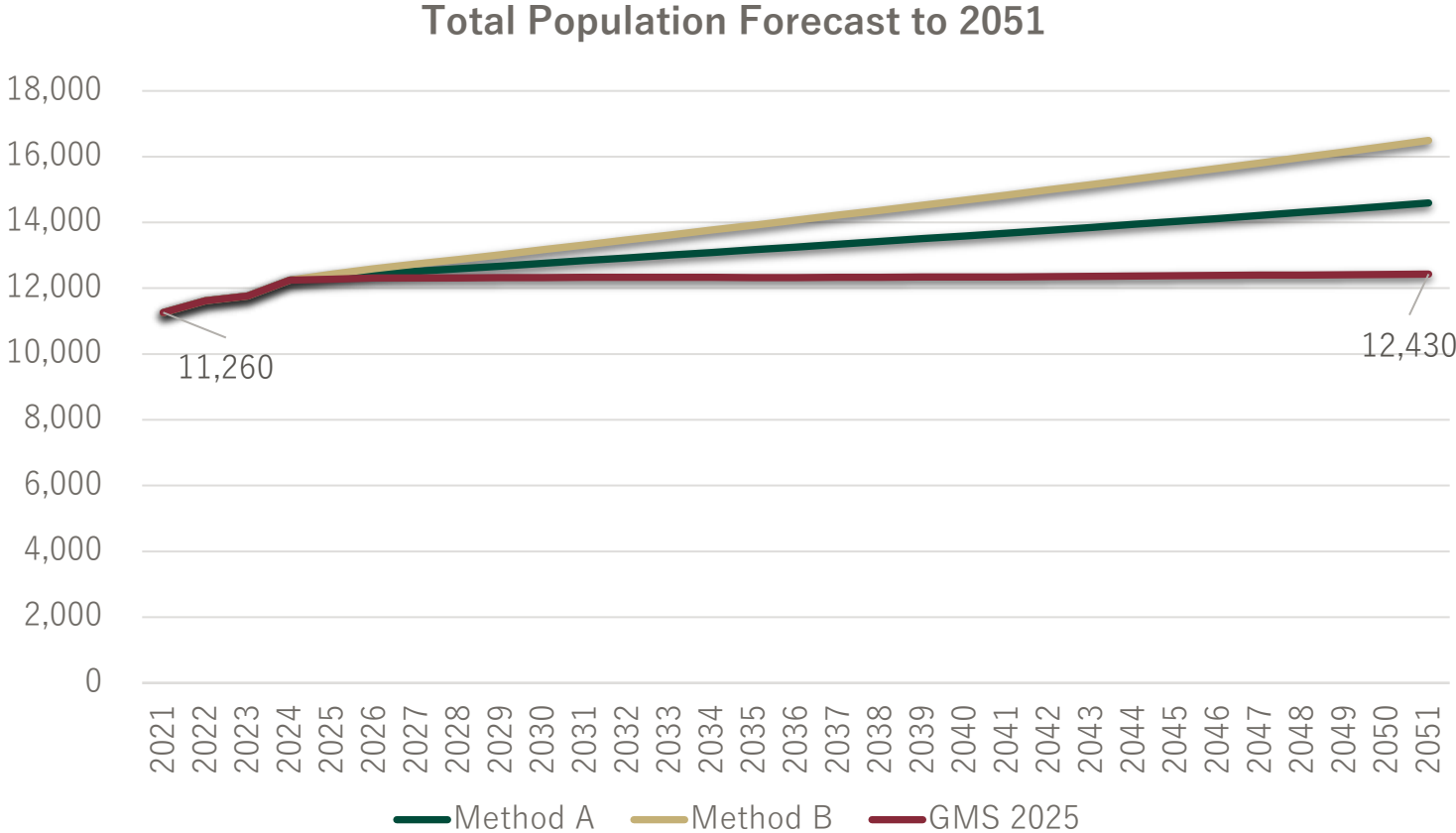
Residential Land Needs: North Grenville

North Grenville	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	3,308	1,429	1,707	6,444
<i>Rural</i>	<i>165</i>	<i>18</i>	<i>0</i>	<i>183</i>
<i>Intensification within Settlement Areas</i>	<i>0</i>	<i>440</i>	<i>660</i>	<i>1,100</i>
<i>Greenfield Land within Settlement Areas</i>	<i>3,143</i>	<i>971</i>	<i>1,047</i>	<i>5,161</i>
Settlement Area Land Need (units)	3,143	971	1,047	5,161
Settlement Area Land Need (gross ha)	209.54	53.94	34.91	298.39
Settlement Area Land Supply (gross ha)				52.45
Surplus/Deficit - Settlement Area Supply				(245.94)

Municipal Allocation: Rideau Lakes

Between 2021 and 2051
Rideau Lakes will:

- 1. Add 1,170 net new residents
- 2. Develop 820 new residential units
- 3. Add 800 net new jobs



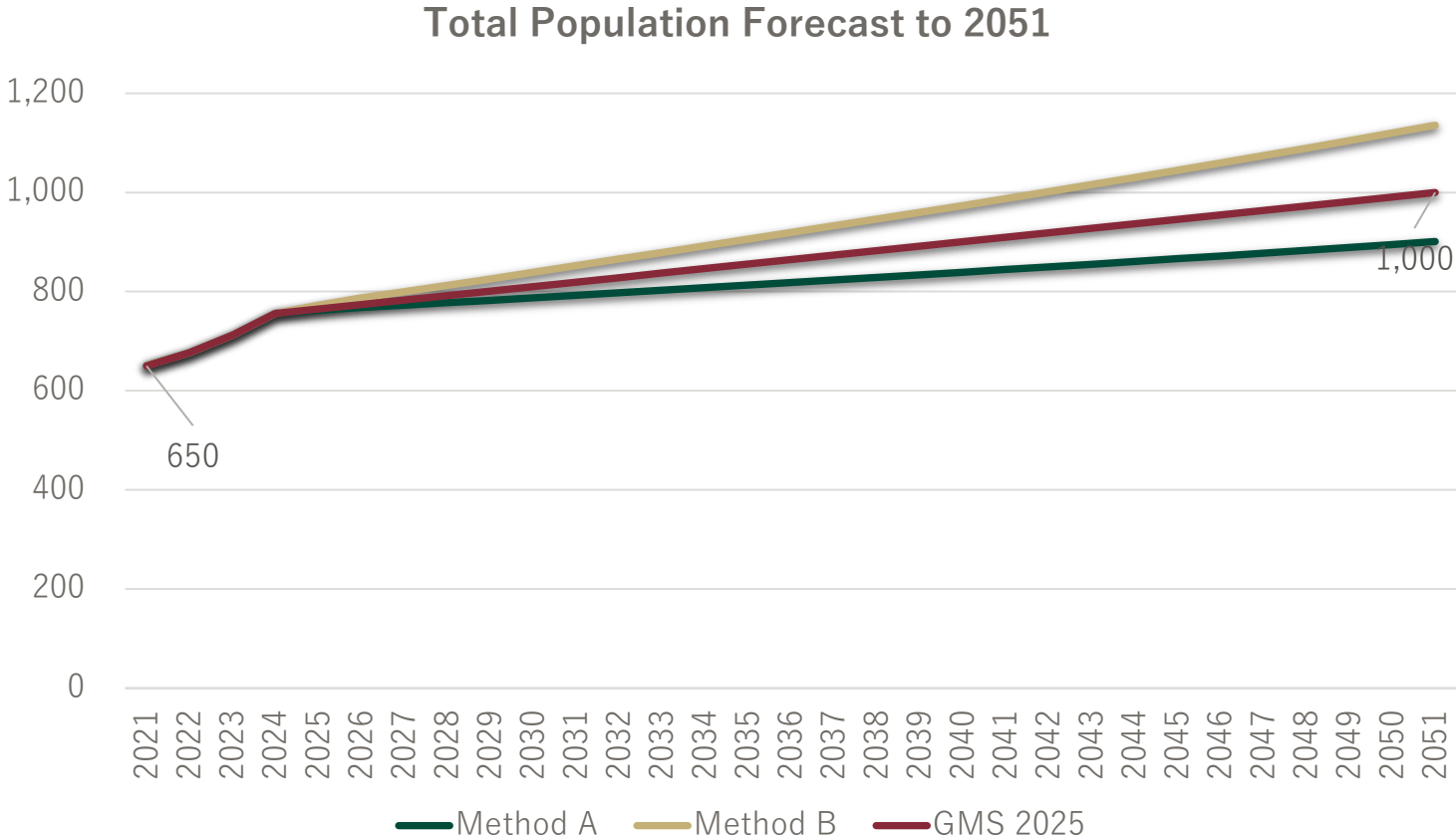
Residential Land Needs: Rideau Lakes

Rideau Lakes	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	484	54	26	564
<i>Rural</i>	<i>410</i>	<i>0</i>	<i>0</i>	<i>410</i>
<i>Intensification within Settlement Areas</i>	<i>43</i>	<i>54</i>	<i>26</i>	<i>123</i>
<i>Greenfield Land within Settlement Areas</i>	<i>31</i>	<i>0</i>	<i>0</i>	<i>31</i>
Settlement Area Land Need (units)	31	0	0	31
Settlement Area Land Need (gross ha)	2.06	0.00	0.00	2.07
Settlement Area Land Supply (gross ha)				56.43
Surplus/Deficit - Settlement Area Supply				54.36

Municipal Allocation: Westport

Between 2021 and 2051
Westport will:

- 1. Add 350 net new residents
- 2. Develop 250 new residential units
- 3. Add 20 net new jobs



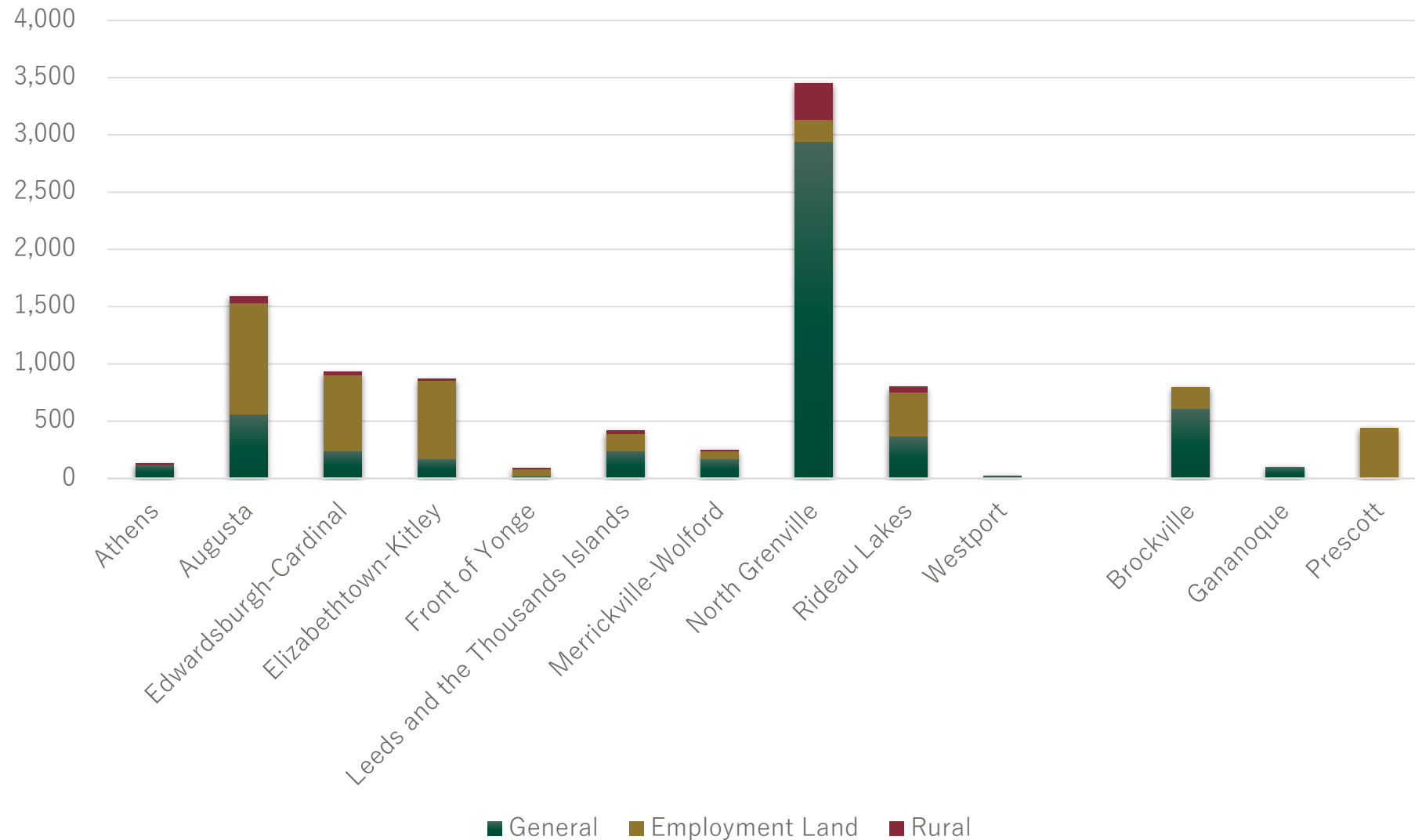
Residential Land Needs: Westport

Westport	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	138	50	0	188
<i>Rural</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
<i>Intensification within Settlement Areas</i>	<i>19</i>	<i>19</i>	<i>0</i>	<i>38</i>
<i>Greenfield Land within Settlement Areas</i>	<i>119</i>	<i>31</i>	<i>0</i>	<i>151</i>
Settlement Area Land Need (units)	119	31	0	151
Settlement Area Land Need (gross ha)	7.95	1.74	0.00	9.69
Settlement Area Land Supply (gross ha)				11.73
Surplus/Deficit - Settlement Area Supply				2.04

Summary of Residential Allocations and Land Needs

- With the exception of North Grenville, all member municipalities currently have enough residential land to accommodate the forecasted growth
- North Grenville will require a settlement area boundary expansion, probably around Kemptville

Employment Allocations by Local Municipality



Employment Land Needs

- UCLG have sufficient designated employment lands to accommodate the growth forecast
- Growth Management Strategy directs growth to:
 - County Employment Areas, including the Elizabeth-Kitley Township owned Business Park
 - Separated Cities
 - County Settlement Areas

Employment Land Allocation

- County Employment Areas: 2,500 net new jobs
 - Augusta: 970
 - Elizabethtown-Kitley: 680
 - Edwardsburgh-Cardinal: 650
 - North Grenville: 200
- Settlement Areas: 650 net new jobs
- Separated Cities: 630 net new jobs

Next Steps

- Circulate presentation for comments
- Finalize growth allocations and land needs
- Present findings to Council
- Prepare and provide report