



Employment Strategy Report Town of Caledon

Draft Report

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Watson & Associates Economists Ltd.
905-272-3600
info@watsonecon.ca

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
B.U.A.	Built-up Area
C.I.P.	Community Improvement Plan
C.M.A.	Census Metropolitan Area
D.G.A.	Designated Greenfield Area
E.L.E.	Employment Lands Employment
G.D.P.	Gross Domestic Product
G.F.A.	Gross Floor Area
G.G.H.	Greater Golden Horseshoe
G.L.A.	Gross Leasable Area
G.T.H.A.	Greater Toronto and Hamilton Area
L.N.A.	Land Needs Assessment
M.C.R.	Municipal Comprehensive Review
M.O.E.	Major Office Employment
M.T.S.A.	Major Transit Station Area
O.P.	Official Plan
O.P.A.	Official Plan Amendment
O.M.A.F.R.A.	Ontario Ministry of Agriculture, Food and Rural Affairs



List of Acronyms and Abbreviations (Cont'd)

R.O.P.	Regional Official Plan
P.M.I.	Purchasing Managers' Index
P.P.S., 2020	Provincial Policy Statement, 2020
P.R.E.	Population-Related Employment
P.S.E.Z.	Provincially Significant Employment Zones
R.O.P.	Regional Official Plan
S.A.B.E.	Settlement Area Boundary Expansion
S.G.U.	Small Geographic Unit
T.P.I.A.	Toronto Pearson International Airport
U.G.C.	Urban Growth Centre
W.H.O.	World Health Organization



Executive Summary



Executive Summary

Terms of Reference

The Town of Caledon is creating a new Official Plan (O.P.) – a road map for the next 30-plus years. The O.P. is a long-range document designed to manage planned change and the physical development of the Town over the 2051 planning horizon. The primary objective of the Caledon Employment Strategy is to provide a long-term vision that supports a broad spectrum of employment uses over the long-term horizon of the Town's O.P., while ensuring that the Town continues to develop its Employment Areas, commercial areas, Mixed-use Areas and Rural Areas in a competitive and sustainable manner. The Caledon Employment Strategy provides a comprehensive assessment of current local and regional conditions regarding industrial, office, retail, institutional and rural employment sectors, anticipated non-residential real estate market trends, as well as market opportunities and disrupters that are anticipated to influence employment growth across the Town of Caledon over the next three decades.

Background

In 2013, the Region of Peel initiated a review of its Regional Official Plan (R.O.P.). An R.O.P. represents a Municipal Comprehensive Review (M.C.R.) under section 26 of the *Planning Act*. The Region of Peel's R.O.P. is required to be consistent with the Provincial Policy Statement, 2020 (P.P.S., 2020), and to conform with the Growth Plan for the Greater Golden Horseshoe, 2019, as amended (Growth Plan, 2019).^[1] Working within this provincial policy framework, the Region of Peel M.C.R. includes a comprehensive analysis of long-term population, housing, and employment growth, as well as associated urban land needs within Community Areas (lands that accommodate residential, mixed-use and population-related employment) and Employment Areas (areas that accommodate industrial type development, office development and employment-supportive uses).

In accordance with the results of the Region of Peel M.C.R, the Town is forecast to reach a population of 300,000 and an employment base of 125,000 by 2051. This

^[1] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020, Ontario, hereinafter referred to as the Growth Plan.



represents a significant increase of 220,000 people and 93,500 jobs over the next 30 years.^[2]

To accommodate forecast population and employment growth over the next 30 years, the Town of Caledon is anticipated to require approximately 4,400 ha (10,870 acres) of additional urban land: 1,530 ha (3,780 acres) for Employment Areas, and 2,870 ha (7,090 acres) for Community Areas through a Settlement Area Boundary Expansion. This requires the Town to establish a clear long-term vision that is supported by a policy framework for its existing and new Community Areas, Employment Areas and Rural Areas. Building on, and consistent with the results of the Region of Peel M.C.R., a key purpose of this Employment Strategy report is to provide planning and economic development policy directions that will assist the Town of Caledon in effectively managing growth and economic development with its Employment Areas, commercial areas, Mixed-use Areas and Rural Areas to the year 2051 through the implementation of its new O.P.

Overview of Regional Economic and Real Estate Trends

Future employment growth within the Region of Peel and the Town of Caledon is strongly correlated with the growth outlook and competitiveness of the broader Greater Toronto and Hamilton Area (G.T.H.A.) economy. The G.T.H.A. region represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The G.T.H.A. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region.

Within this broad regional context, the Town of Caledon offers local attributes that appeal to prospective international, national and local firms as well as new residents across all major demographic groups. These local attributes include, but are not limited to, the Towns' proximity to major transportation infrastructure, distance to major employment markets, access to labour, urban land expansion potential for new housing and businesses, recreational amenities and access to the countryside, vibrant settlement areas, a low crime rate, and a high quality of life. Given the Town's appeal

^[2] Region of Peel, 2051 Land Needs Assessment Report, presented to the Region of Planning & Growth Management Committee on October 7, 2021. Population forecast has been adjusted for the net Census undercount.



to both new residents and business as well as the Town's ability to accommodate urban growth pressures largely in existing and planned greenfield areas, the Town's share of Peel Region population and employment growth is anticipated to significantly increase over the next three decades.

With respect to long-term employment trends, the Town is anticipated to steadily grow across a range of established and emerging export-based sectors (i.e. industrial and office uses) as well as population-serving employment sectors (i.e. retail and institutional uses, including work at home). Looking forward, market demand on employment lands is anticipated to be increasingly driven by growth in the "knowledge-based" or "creative class" economies, including employment sectors such as advanced manufacturing, professional, scientific and technical services, finance, insurance, real estate, information and culture, health, and education. Many of these sectors are also expected to experience strong growth prospects at the broader regional level. With an increasing emphasis on these knowledge-based sectors, prestige industrial, office, flex office and multi-purpose facilities encompassing office, non-office and employment-supportive uses will become an increasingly dominant built form across the Town's Employment Areas.

The Goods Movement sector has become a dominant sector in the Town of Caledon, representing a large uptake of Employment Area lands absorbed over the past several years. Continued economic growth and diversification within the Goods Movement sector provides an opportunity to further expand the depth of this sector in Caledon across employment uses such as Major Office Employment, other office, research and training facilities, manufacturing and assembly as well as other employment-supportive sectors. While recent growth has been concentrated in the Goods Movement sector in Caledon, the Town has a diverse employment base to build upon across its urban and rural areas.

The nature of traditional industrial processes is also rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. For example, emerging advanced manufacturing and clean technology sectors often have siting, space and built-form requirements that are significantly different from traditional manufacturing. Anticipating and responding to the evolving needs of industry will be necessary for the Town to better position itself for sustained growth, particularly in faster growing emerging industrial sectors. Recognizing these recent structural changes in the macro-economy, there has been a shift in planning philosophy that calls for



developing Employment Areas to provide for a wider range of amenities and employment-supportive uses that complement both knowledge-based and traditional industrial sectors.

On-going structural changes in the macro-economy and disruptive forces, which are being further accelerated by COVID-19, complicate the Town's economic growth outlook. It is important for the Town to continue to navigate through these macro-economic factors to address how these trends are influencing local economic opportunities and challenges. At the Regional and local levels, the Region of Peel and the Town of Caledon have considerable control and ability to position the Region and the Town in a positive manner. One key area where Caledon can positively influence the future competitiveness of its economic base relates to the structure and quality of its Employment Areas, commercial areas and Mixed-Use Areas. Further, supporting employment diversification in the Town's Rural Area will contribute toward the vitality of the rural and urban economies across the Town.

Planning for Growth in Employment Areas

A major factor influencing the future competitiveness of the Town's economic base relates to the structure, quality and "readiness" of its Employment Areas. Currently, the Town has a very limited supply of Employment Area lands available for development (i.e., available for sale/lease) that are fully municipally serviced. It is anticipated that the Town will completely deplete its remaining supply of serviced Employment Area lands within the few years if new Employment Areas are not added to the Town's Employment Area land supply. Efforts by the Town and the Region should focus on expediting the serviced supply of designated Employment Area lands within the Town of Caledon. The Town is currently undertaking an industrial business case study which ensure the protection of land supply for future investment/development in key industrial sectors identified in the Economic Development Strategy.^[3] Sectors identified in the Economic Development Strategy include: advanced manufacturing, agri-food processing/science and knowledge based sectors. As discussed in the Economic Development Strategy report, the Town needs to control the development of lands for the purpose of logistics/warehouse or Goods Movement sector. The Goods Movement Sector has significantly depleted the supply of land available for the key sectors that the Town of

^[3] An Economic Strategy for the Town of Caledon, 2020-2030, prepared by MDB Insights, February 2020



Caledon would like to attract. The Goods Movement Sector has absorbed and significantly depleted the supply of land available for the key sectors that the Town of Caledon would like to attract.

Fundamental to the long-term planning and economic development objectives of the O.P. is an adequate supply and market choice of employment lands over the next 30 years and beyond within well-defined, designated Employment Areas. Generally, these areas should be located in proximity to Goods Movement infrastructure and/or along transportation corridors. Other attributes, such as access to high-order transit, proximity to employment-supportive uses as well as connectivity to Community Areas, are also critical for certain Employment Areas, particularly those that focus on knowledge and innovation.

Working with the Region of Peel, the Town should proactively plan for new Employment Area lands to the year 2051, as identified through the Region of Peel's M.C.R. The Region's M.C.R. process, which includes a detailed Employment Area land needs assessment, occurs every 10 years. According to the Growth Plan, 2019, municipalities may plan for the long-term protection of Employment Areas provided lands are not designated beyond the horizon of the Plan (i.e., 2051).^[4] Accordingly, it is recommended that the Town identify lands that should be reserved as future urban Employment Areas beyond the 2051 planning horizon that are strategically located in proximity to planned Employment Areas, major transportation corridors and/or Goods Movement infrastructure. This would provide Town direction regarding the protection of future lands for Employment Area development where the need for such lands cannot be justified at this time through the Region of Peel M.C.R. process to the year 2051.

Planning for Growth in Commercial and Mixed-Use Areas

A major objective of provincial, Regional and local planning policy is that municipalities ensure land is available to accommodate a range and mix of land uses to 2051 to support mixed-use developments that embrace “complete community” principles such as: encouraging pedestrian movement, increasing employment density, and establishing a sense of place. Striking a balance in supporting mixed-use development and ensuring an adequate supply of non-residential lands in Community Areas will be a

^[4] Growth Plan, 2019, p. 8.



key challenge for the Town going forward, especially with increasing pressure to accommodate residential development.

Over the next 30 years, it is anticipated that approximately 40% of the Town's employment growth will be accommodated within the Community Area (including downtown, other designated commercial and institutional lands, and Community Area Settlement Area Boundary Expansion lands). Based on the detailed review of commercial land supply and demand provided herein, the Town will require approximately 162 ha (400 acres) of additional commercial land within the Community Area Settlement Area Boundary Expansion lands (i.e., Community Area expansion lands).

These recommended commercial expansion lands are projected to accommodate approximately 472,900 sq.m (5.1 million sq.ft.) of commercial building space required to support Town-wide population growth. The built-form and type of commercial employment over the next 30 years is anticipated to evolve based on changes in consumer behaviour and disruption, largely through e-commerce and technology. Given the rise of e-commerce and other disruptors anticipated over the forecast horizon, policy enhancements to the Town's commercial and mixed-use areas will be required to ensure that the Town's Community Area base grows with population.

Through the M.C.R. the Region of Peel has identified two Major Transit Station Areas (M.T.S.A.s) in the Town of Caledon, including:

- **Mayfield West Transit Hub (Planned M.T.S.A.)** – located in the Mayfield West settlement (Phase 2, Stage 2 area) on vacant commercial lands; and
- **Caledon GO Transit Station (Primary M.T.S.A.)** – located just north of the Bolton settlement area and characterized as a dry industrial area.

The Town's M.T.S.A.s provide an opportunity to anchor major office and provide connectivity to the Town's existing and new Employment Areas and Community Areas. Workers in knowledge-intensive industries increasingly require accessible and dynamic work environments that promote interaction and innovation. This underscores "placemaking" as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments which integrate retail, office commercial,



residential, and other community uses with public open spaces. It should be recognized that such physical qualities are typically what drives successful office real estate markets over the long term.

Planning for Growth in Rural Areas

While provincial policies require municipalities to direct the majority of population and employment growth to settlement areas, a key provincial policy thrust is to support the viability of Rural Areas. It is recognized that the Town's agricultural base and natural heritage system are core economic assets and represent a regional draw to the Town from a tourism and economic development perspective. The Town's diverse agricultural sector provides a competitive advantage over other larger urban centres within the G.T.H.A. with respect to the commercialization of value-added agricultural goods and services. Further, the Town's agricultural industry in the Rural Area provides an opportunity to support employment opportunities in the Urban Area, such as employment in food processing, training and agriculture research and development. As such, the Town's O.P. should include policies that promote innovation and entrepreneurship in the agriculture sector and explore potential synergies related to economic development in the Town's urban and rural areas.

Next Steps

As previously mentioned, the Town is preparing a new O.P. to bring the local O.P. into conformity with provincial and Region of Peel policies, and to incorporate the local vision and guiding principles in the O.P. policies. As part of the O.P. process, the Town has prepared a series of background studies which focus on key growth management topics and planning policy themes. The new O.P. will include updated policies and schedules that are informed from recommendations provided in these studies, including this Employment Strategy study. Further, the recommendations provided in the Employment Strategy. will provide guidance in planning for employment in Secondary Plans and other site-specific plans.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

The Town of Caledon is creating a new Official Plan (O.P.) – a road map for the next 30 plus years. The O.P. is a long-range document that is designed to manage planned change and the physical development of the Town over the 2051 planning horizon. As part of the Town of Caledon Official Plan Review (O.P.R.) process, the Town retained Watson & Associates Economists Ltd. (Watson) in 2020 to prepare an Employment Strategy. The primary objective of the Caledon Employment Strategy is to provide a long-term vision that supports a broad spectrum of employment uses over the long-term horizon of the Town's O.P., while ensuring that the Town continues to develop its Employment Areas, commercial areas, Mixed-use Areas and Rural Areas in a competitive and sustainable manner. The Caledon Employment Strategy provides a comprehensive assessment of current local and regional conditions regarding the industrial, office, retail, institutional and rural employment sectors, anticipated non-residential real estate market trends, as well as market opportunities and disrupters that are anticipated to influence employment growth across the Town of Caledon through 2051.

In 2013, the Region of Peel initiated a review of its Regional Official Plan (R.O.P.). An O.P.R., represents a Municipal Comprehensive Review (M.C.R.) under section 26 of the *Planning Act*. The Region of Peel's R.O.P. is required to be consistent with the Provincial Policy Statement, 2020 (P.P.S., 2020), and to conform with the Growth Plan for the Greater Golden Horseshoe, 2019, as amended (Growth Plan, 2019).^[5] Working within this provincial policy framework, the Region of Peel's M.C.R. includes a comprehensive analysis of long-term population, housing, and employment growth, as well as associated urban land needs within Community Areas (lands that accommodate residential, mixed-use and population-related employment) and Employment Areas (areas that accommodate industrial type development, office development and employment-supportive uses).

^[5] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020, Ontario, hereinafter referred to as the Growth Plan.



Building on, and consistent with the results of the Region of Peel's M.C.R., a key purpose of this Employment Strategy report is to provide planning and economic development policy directions that will assist the Town of Caledon in effectively managing growth and economic development with its Employment Areas, commercial areas, Mixed-use Areas and Rural Areas to the year 2051 through the implementation of its new O.P.

1.2 Context

The Town faces a number of opportunities and challenges with respect to planning for employment, in light of the evolving structural changes in the economy and disruptive factors. Long-term employment growth within the Town is anticipated to be driven by demand from a broad range of established and emerging sectors with increasing focus on the knowledge-based economy. Ultimately, this will continue to influence the manner in which the Town plans for its Employment Areas, commercial areas, Mixed-use Areas and Rural Areas.

In accordance with the results of the Region of Peel's M.C.R, the Town is forecast to reach a population of 300,000 and an employment base of 125,000 by 2051. This represents a significant increase of 220,000 people and 93,500 jobs over the next 30 years.^[6] To accommodate forecast population and employment growth over the next 30 years Town of Caledon is anticipated to require approximately 4,400 ha of additional urban land; 1,530 ha for Employment Areas and 2,870 ha for Community Areas through a Settlement Area Boundary Expansion. This emphasizes the need to comprehensively assess the Town's long-term employment growth and non-residential land needs in an integrated, phased and strategic manner. This also requires the need for the Town to establish a clear long-term vision and planning policy framework for its existing and new Employment Areas, commercial areas and Mixed-use Areas, as well as its Rural Areas. This policy framework must anticipate the evolving nature of the local and regional economy and reflect the diverse needs of industry and businesses of all types and sizes over the long term. Looking forward the Town will need to consider land use policy that support a diverse range of sectors and consider policies that direct logistics warehouses (Goods Movement sector) to appropriate locations, as well as policies that encourage

^[6] Region of Peel, 2051 Land Needs Assessment Report, presented to the Region of Planning & Growth Management Committee on October 7, 2021. Population forecast has been adjusted for the net Census undercount.



higher employment densities (such as integrated office and warehouse developments and multiple storeys) and better utilization of lands for these developments. Planning and economic development policies related to the Town's non-residential areas must also offer a degree of flexibility and nimbleness that allows for relatively rapid responses to unforeseen changes, which can be a critical competitive advantage relative to surrounding markets.

1.3 Study Components

Key components of the study include:

- Overview of existing policy framework regarding Employment Areas and non-residential lands in the Town of Caledon;
- Review of macro-economic and regional employment trends influencing non-residential development patterns in the Town of Caledon;
- Discussion of the Town's economic structure and future growth opportunities by established and emerging employment sectors;
- Review of the Region of Peel's employment forecast and land needs analysis, including an assessment of employment opportunities within the Town's new and existing Employment Area, Community Areas and Rural Areas;
- Discussion of the potential opportunities for employment uses within the Town's Major Transit Station Areas (M.T.S.A.s); and Strategic policy recommendations related to the accommodation of non-residential uses.



Chapter 2

Planning and Policy Context



2. Planning and Policy Context

This chapter provides an overview of the relevant provincial, Regional and Town policies that apply to long-term growth management and economic competitiveness in the Town of Caledon. These documents, referenced herein, provide the policy framework for the Town of Caledon Employment Strategy.

2.1 Provincial Policy Context

Two key provincial policy documents that apply to planning for employment use are the P.P.S., 2020 and the Growth Plan, 2019. Collectively, these documents outline provincial land-use planning interests and provide high-level policy direction for Greater Golden Horseshoe (G.G.H.) municipalities.

2.1.1 *Provincial Policy Statement, 2020*

The P.P.S., 2020 provides policy direction on matters of provincial interest relating to land-use planning and development. It is issued under the authority of section 3 of the *Planning Act* and requires that all planning decisions “shall be consistent with” the P.P.S., 2020 (*Planning Act*, R.S.O. 1990, P. 13, s. 3).

The P.P.S., 2020 came into effect on May 1, 2020, replacing the 2014 P.P.S. As per the P.P.S., 2020, Ontario municipalities are required to have enough urban land supply, including Employment Areas, to meet projected needs for a planning horizon of 25 years.^[7] This change largely relates to the goal of the P.P.S., 2020 to support the economy and job creation, in addition to providing greater predictability to the land-use planning system. As set out in section 1.3.2.7. of the P.P.S., 2020, Employment Areas can be planned for beyond this horizon provided they are not designated beyond the planning horizon.

The P.P.S., 2020 recognizes the significant economic contribution of Employment Areas, and the importance of protecting and preserving them. As such, it provides details on how municipalities should plan for employment. The P.P.S., 2020 policies

^[7] Section 1.1.2. of the P.P.S., 2020 notes that where an alternate time period has been established for specific areas of the Province as a result of a provincial planning exercise or a provincial plan, that time frame may be used for municipalities within the area. As per the Growth Plan, 2019, the long-term planning horizon is 2051.



suggest preparing and readying Employment Areas by identifying strategic sites, monitoring the availability and suitability of employment sites with a focus on market-ready sites, and actively seeking to address potential barriers to investment (policy 1.3.2). The policy further outlines that, during an O.P. review or update, planning authorities assess Employment Areas in local O.P.s to ensure the designation is appropriate for the planning function of the Employment Area (policy 1.3.2.2).

2.1.2 Provincial Growth Plan for the Greater Golden Horseshoe

The Growth Plan, 2019 provides growth forecasts for single- and upper-tier municipalities and provides policy direction on a range of matters including population and employment growth, land use, housing, economic competitiveness, infrastructure, and transportation. Relevant aspects of the Growth Plan, 2019 for this study include the following:

Population and Employment Forecasts

- Schedule 3 of the Growth Plan, 2019 provides population and employment forecasts for upper-tier and single-tier G.G.H. municipalities that are considered minimum forecasts.
- The Region of Peel's population and its employment base is forecast to reach a minimum of 2,280,000 and 1,070,000, respectively, by 2051.^[8]

Managing and Directing Growth

- Growth will be directed to settlement areas; within settlement areas it will be focused on strategic growth areas, locations where higher-order transit exists or is planned, and areas with existing or planned public services facilities.
- Municipalities should develop as complete communities with a diverse mix of land uses, including employment and residential, with convenient access to local stores, services and public service facilities.
- Population and employment growth are to be accommodated by reducing dependence on the automobile through the development of mixed-use, transit-supportive, pedestrian-friendly urban environments.

^[8] Growth Plan, 2019, Schedule 3.



- Municipalities should preserve lands within settlement areas in the vicinity of major highway interchanges, ports, rail yards and airports for manufacturing and associated retail, office, and ancillary facilities where appropriate.
- Existing industrial uses and office parks in Employment Areas are to be protected from non-compatible land uses, which includes prohibiting residential uses, and the encroachment of sensitive land uses, major retail uses, or major office uses on industrial, manufacturing, or other similar uses is to be avoided (or mitigated).
- Municipalities are directed to identify and designate Employment Areas lands within settlement areas adjacent to or near major Goods Movement facilities and corridors including major highway interchanges.

Economic Development and Competitiveness

- The Growth Plan, 2019, through policy 2.2.5.1, emphasizes the significance of promoting the economic development and competitiveness of the G.G.H. by:
 - Making more efficient use of existing Employment Areas including higher employment density and utilization of vacant and underutilized Employment Area lands;
 - Ensuring that sufficient Employment Area land is available in appropriate locations for a range of employment to accommodate employment growth anticipated through to the long-term planning horizon;
 - Planning for better transit connections to locations with high employment densities; and
 - Integrating and aligning land-use planning and economic development goals and strategies.

Employment Density

- According to the Growth Plan, 2019, upper- and single-tier municipalities, in consultation with lower-tier municipalities, will each establish minimum density targets for all Employment Areas within settlement areas. The density targets are to reflect the current and anticipated type and scale of employment that characterizes the Employment Area to which the target applies. Minimum employment density targets also reflect opportunities for the intensification of Employment Areas on sites.



Settlement Area Boundary Expansions

- Settlement Area Boundary Expansion of urban settlement areas are generally to occur through an M.C.R. based on a series of criteria.
- Settlement Area Boundary Expansion of up to 40 ha can occur outside a M.C.R. based on criteria set out in the Growth Plan, 2019.^[9]
- Existing Employment Areas outside of settlement areas on Rural Lands (generally referred to as Rural Employment Areas) that were designated for employment uses in an O.P. that was approved and in effect as of June 16, 2006, may accommodate expansions. Expansions to these existing Employment Areas may be permitted only if necessary to support the immediate needs of existing businesses and if compatible with the surrounding uses.^[10]
- In accordance with the Growth Plan, 2019, Settlement Area Boundary Expansion within the Greenbelt Area can expand if identified as a Town/Village in the Greenbelt Plan and the proposed expansion is modest in size, representing a five per cent increase in the geographic size for the settlement area and up to a maximum size of 10 hectares.^[11]

Conversions

- The Growth Plan, 2019 provides a framework for conversions of employment lands to non-employment uses. Conversions of employment lands to non-employment uses may be permitted only through a Region-initiated M.C.R., based on the following criteria:
 - There is a need for the conversion;
 - The lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
 - Proposed uses do not adversely affect the viability of the Employment Area, intensification/density targets, or other Growth Plan, 2019 policies;
 - Proposed uses can be accommodated through existing or planned infrastructure;

^[9] Growth Plan, 2019, Policy 2.2.8.5, p. 27.

^[10] Growth Plan, 2019, Policy 2.2.9.5, p. 28.

^[11] Growth Plan, 2019, Policy 2.2.8., p. 26.



- As part of the Growth Plan, 2019, the Province will allow for employment land conversions in advance of an M.C.R.^[12] based on the following conditions:
 - A need for the conversion has been determined;
 - The lands are not required over the planning horizon for the employment purposes for which they are designated;
 - Proposed uses do not adversely affect the viability of the Employment Area, intensification/density targets, or other Growth Plan, 2019 policies;
 - Proposed uses can be accommodated through existing or planned infrastructure;
 - The proposed land use must maintain a “significant number” of jobs on the subject lands (established through a development criteria); and
 - The conversion is not part of a Provincially Significant Employment Zone unless the part of the Employment Area is located within an M.T.S.A.^[13]

Provincially Significant Employment Zones (P.S.E.Z.)

- The Province has identified key Employment Areas as Provincially Significant Employment Zones (P.S.E.Z.) for the purposes of long-term planning for job creation and economic development.
- Policy 2.2.5.10 of the Growth Plan, 2019 outlines that Employment Areas defined by the Minister to be P.S.E.Z. may still be converted to non-employment uses, however, only through an M.C.R. and where the requirements of policy 2.2.5.9 are met (i.e., there is a need for the conversion, the lands are not required over the planning horizon for the employment purposes for which they are designated, etc.).
- There is one P.S.E.Z. within the Town of Caledon. P.S.E.Z. #15, which comprises Employment Areas along the Highway 50/Highway 427 corridor in Caledon, Vaughan, Brampton and Toronto. It is important to note that the

^[12] The policy permits the employment land conversion in advance of the M.C.R. to be privately initiated.

^[13] Growth Plan, 2019, section 2.2.5.



majority of designated Employment Areas within the Bolton settlement area are identified as P.S.E.Z. and are protected from conversions outside an M.C.R.

Figure 2-1
Provincially Significant Employment Areas
Town of Caledon and Surrounding Area



Source: Ministry of Municipal Affairs and Housing, interactive mapping of Provincially Significant Employment Zones, August 23, 2021.

Strategic Growth Areas – Urban Growth Centres and Major Transit Station Areas

- Urban Growth Centres are recognized in the Growth Plan, 2019 as regional focal points for accommodating population and employment growth. The Growth Plan, 2019 does not identify any Urban Growth Centres within the Town of Caledon.
- The Growth Plan, 2019 defines M.T.S.A.s as “the area including and around any existing or planned high order transit station or stop within a settlement area, or the area including and around a major bus depot in an urban core. M.T.S.A.s are



generally defined as the area within an approximate 500 to 800 metre radius of a transit station, representing a 10-minute walk.”^[14]

- The Region of Peel through the M.C.R. has identified two M.T.S.A.s in the Town of Caledon, as shown in Figure 2-2:
 - Mayfield West Transit Hub (Planned M.T.S.A.); and
 - Caledon GO Transit Station (Primary M.T.S.A.).
- The Caledon GO Transit Station is proposed (draft O.P. policy) as a Primary M.T.S.A. A Primary M.T.S.A. is an area that has existing or planned transit-supportive built-forms that can meet or exceed the minimum transit-supportive density target, while a secondary M.T.S.A. has a land-use pattern and built form that may require an alternative density target.^[15]
- The Mayfield West Transit Hub is a planned M.T.S.A. Planned M.T.S.A.s, as identified in the Region of Peel’s R.O.P., are not yet delineated but will be when infrastructure planning and investment and/or land-use changes unlock potential.^[16]
- It is important to recognize that the proposed M.T.S.A.s in Caledon are not identified in the Growth Plan, 2019 as being located on a priority transit corridor.^[17] Only M.T.S.A.s that are on a priority transit corridor (Growth Plan, 2019, Schedule 5) are subject to the M.T.S.A. density policies identified in the Growth Plan, 2019.
- Through the M.C.R., the Region of Peel has identified a planned minimum density of 150 people and jobs/ha for the M.T.S.A. in Bolton (Caledon GO). No density has been set for the Mayfield location.

^[14] Growth Plan, 2019, definitions, p. 75.

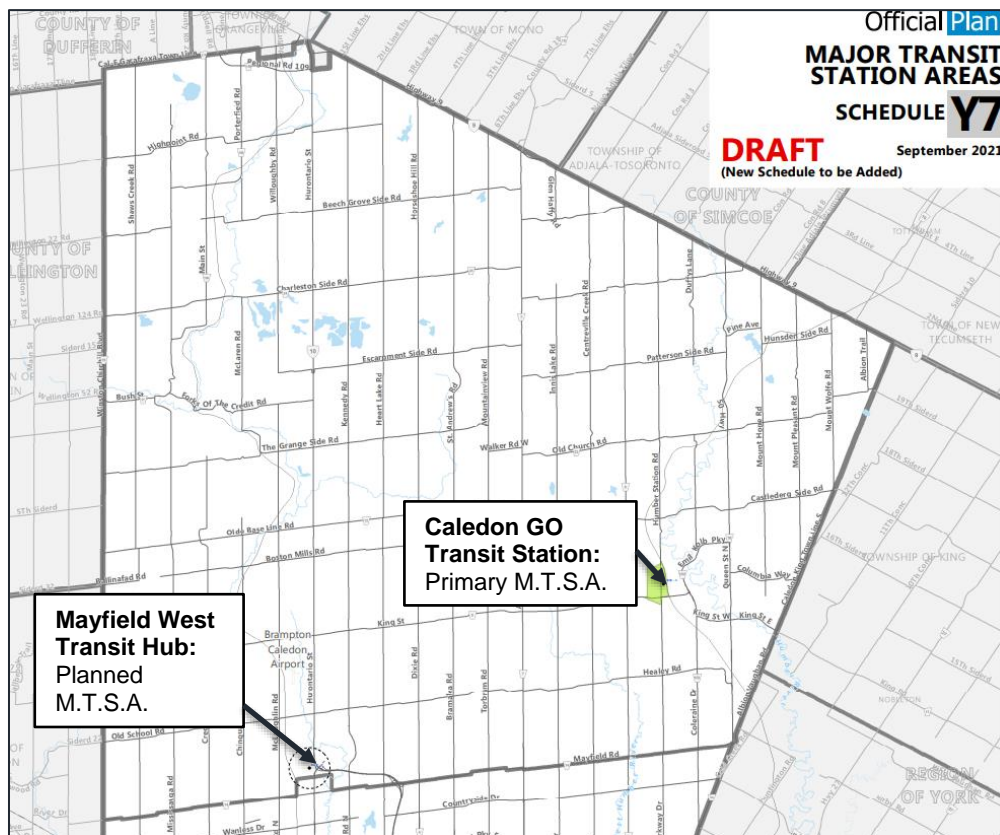
^[15] R.O.P. draft M.T.S.A. policy 5.6.19.6, p. 205, October 1, 2021.

^[16] Ibid.

^[17] Growth Plan, 2019, policy 2.2.4, p. 17.



Figure 2-2
Town of Caledon
Map of Draft Region of Peel M.T.S.A.s



Source: Region of Peel, Draft Official Plan, Major Transit Station Areas. Schedule Y7, September 2021.

2.1.3 Greenbelt Plan, 2017

The current Greenbelt Plan came into effect on July 1, 2017, and together with the Oak Ridges Moraine Conservation Plan and the Niagara Escarpment Plan, identifies where urbanization should be avoided to protect the agricultural land base and the area's ecological and hydrological features. It is important to note that the Growth Plan, 2019 also contains policies on managing and protecting land within the Greenbelt Area.

The Greenbelt Area comprises "Protected Countryside" (including "Natural Heritage System" and "Towns/Villages"), "Urban River Valleys," "Niagara Escarpment Plan Area" and the "Oak Ridges Moraine Area." The Greenbelt Protected Countryside Area,



together with the Oak Ridges Moraine Area covers a very large portion of the Town of Caledon's land base.

The Town Structure in the Town of Caledon, classified into three main components:

- **The Greenbelt Area** – protected from urban development and includes Protected Countryside, Natural Heritage System, Niagara Escarpment Plan Area and Oak Ridges Conservation Plan Area;
- **Agriculture/Rural Area (“Whitebelt Area”)** – Rural Lands outside the Greenbelt that may accommodate urban expansion (subject to Growth Plan, 2019 policies); and
- **Settlement Area** – lands to accommodate development (subject to Growth Plan, 2019 policies).

Most of the Town's villages and hamlets are located within the Greenbelt Area. Settlements identified in the Greenbelt Plan as “hamlets” and “rural settlement area” in the Oak Ridges Moraine are considered Rural Settlement Areas in the Growth Plan, 2019. The Growth Plan identifies Rural Settlement Areas as existing hamlets or similar existing small settlement areas that are long established and identified in O.P.s. These communities are serviced by individual private on-site water and/or private wastewater systems, contain a limited supply of undeveloped lands that are designated for development, and are subject to O.P. policies that limit growth. Growth within Rural Settlement Areas includes infill and minor rounding of existing development. While adjustments to the boundaries of Rural Settlement Areas can be made during the M.C.R., Rural Settlement Areas in the Greenbelt are prohibited from expanding the settlement boundaries.

In addition to Rural Settlement Areas within the Greenbelt, Caledon East which is identified as an Urban Settlement Area in the Growth Plan, 2019 (identified as Rural Service Centre in the Town's O.P.) is surrounded by Greenbelt Protected Countryside. According to the Growth Plan, 2019, settlement areas within this area can expand if identified as a Town/Village in the Greenbelt Plan and the proposed expansion is modest in size, representing a five per cent increase in the geographic size for the settlement area and up to a maximum size of 10 hectares. Further, residential



development would not be permitted on more than 50 per cent of the lands that would be added to the settlement area.^[18]

As noted in the Greenbelt Plan (2017) Peel 2041 Discussion Paper (November 2019), the Region of Peel will need to update its R.O.P. to conform with the provincial Greenbelt Plan policies. The Discussion Paper has identified revisions to R.O.P. policies and new policies required to bring the R.O.P. into conformity.

2.1.3.1 Non-Residential Opportunities in the Greenbelt Area

The Greenbelt Plan, 2017 provides direction on accommodating employment and non-residential development. The following are key highlights:

- The Greenbelt Plan recognizes that the rural lands support a range of recreational, tourism, institutional (including cemetery) and resource-based commercial/industrial uses.
- All types, sizes and intensities of agricultural uses and normal farm practices are permitted on agriculture lands, including in Prime Agriculture Areas. All agriculture-related uses and on-farm diversified uses are permitted in Prime Agriculture Areas based on the provincial Guidelines on Permitted Uses in Ontario's Prime Agricultural Areas.
- Non-agriculture development opportunities in the Greenbelt Area are largely to be directed to Settlement Areas (outside "Protected Countryside"), existing non-residential development sites and on lands not identified within Prime Agriculture Areas.
- Proposals for development of non-agricultural uses on rural lands (in the Protected Countryside) must demonstrate that the use, location and servicing type is appropriate on rural lands. Further, the development must demonstrate that there are no negative impacts on the key natural heritage features and hydrologic features and functions.^[19]
- Major development within the Greenbelt Protected Countryside and within key hydrologic area is subject to additional policies. Within the context of the Greenbelt Plan, major development includes development exceeding or consisting of one of the following: creation of four dwelling units; 500 sq.m of

^[18] Growth Plan, 2019, policy 2.2.8., p. 26.

^[19] Greenbelt Plan, 2017, policy 4.1.1, p. 37.



non-residential building space; and major recreational uses that require large-scale modification to terrain, vegetation, or both, and those that usually also require large-scale buildings or structures (e.g., golf courses, serviced playing fields, serviced campgrounds and ski hills).^[20]

- Municipalities can elect to include further restrictions on the scale and uses within the Greenbelt.

2.2 Provincial Land Needs Assessment

The Minister formally issued the final L.N.A. methodology on August 28, 2020, in accordance with policy 5.2.2.1 c) of the Growth Plan, 2019.^[21] Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019 to assess the quantity of land required to accommodate forecast growth.

The L.N.A. methodology identifies that the results of a land needs assessment can only be implemented through an upper-tier or single-tier M.C.R. As previously stated, an M.C.R. is a new O.P. or an O.P.A. initiated by an upper- or single-tier municipality under section 26 of the *Planning Act*, which comprehensively applies the policies and schedules in the Growth Plan, 2019.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas within the urban system including **Community Areas** and **Employment Areas**. It is important to recognize that the provincial L.N.A. methodology focuses on the urban system, where there are settlement areas with servicing and urban amenities that support the growth management policies of the Growth Plan, 2019.

Provided below is a summary of the two areas that are reviewed for land requirements.

“Community Areas: Areas where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some employment land employment jobs. Community areas include delineated built-up areas

^[20] Greenbelt Plan, 2017, policy 4.1.1, p. 37.

^[21] A Place to Grow: Growth plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.



[B.U.A.] and the designated greenfield area [D.G.A.] (excluding employment areas).

Employment Areas: Areas where most of the employment land employment (employment in industrial-type buildings) jobs are, as well as some office jobs and some population-related jobs, particularly those providing services to the employment area. Employment areas (including prime employment areas) may be located in both delineated built-up areas [B.U.A.] and the designated greenfield area [D.G.A.].”

2.3 Region of Peel M.C.R. and O.P.

The Peel R.O.P. provides policy directions on strategic matters to guide growth and development to the City of Mississauga, the City of Brampton, and the Town of Caledon. The document was approved by Regional Council in October 1996, and the last consolidation was made in September 2021. The Peel R.O.P. is currently under review as part of the Region’s M.C.R. to bring regional policies in conformity with provincial policies, including the Growth Plan, 2019, the Greenbelt Plan, 2017 and the P.P.S., 2020.^[22]

Key highlights of the findings of the Region’s M.C.R. to date are provided below. Appendix A provides forecast tables for further information.

2.3.1 *Population and Employment Forecast Allocations to 2051*

As previously discussed, the Growth Plan, 2019 requires that the Region of Peel plan for a minimum population and employment base of 2,280,000 and 1,070,000, respectively, by 2051. As part of the M.C.R., the Region completed a detailed allocation of population, housing and employment growth by Area Municipality, as well as by policy area (D.G.A.; B.U.A.; Urban Employment Area; and Rural Area) and by small geographic unit (S.G.U.).

The allocation of the employment forecast by Area Municipality is provided in Figure 2-3. The Town of Caledon is anticipated to reach a population of 300,000 and an employment base of 125,000 by 2051. Caledon is anticipated to accommodate 28% of the Region’s employment growth over the 2021 to 2051 period.

^[22] Region of Peel Official Plan, Office Consolidation September 2021.



Figure 2-3
Region of Peel
Employment Growth Forecast by Area Municipality, 2021 to 2051

Area Municipality	2021 Employment	2051 Employment	2021-2051 Employment
City of Mississauga	493,300	590,000	100,600
City of Brampton	210,400	355,000	144,600
Town of Caledon	31,700	125,000	93,300
Region of Peel	735,400	1,070,000	338,500

Source: Derived from the Region of Peel, Peel M.C.R. 2051 forecasts.

The analysis in this report builds on the employment forecast allocation to the Town of Caledon, as well as the allocation by policy area. Further, Peel Region M.C.R. figures including the population forecast are provided in Appendix A.

2.3.2 2051 Density Targets for Community Area and Employment Area Settlement Area Boundary Expansion Lands

2.3.2.1 Designated Greenfield Area Community Area

The Growth Plan, 2019 requires that the Region of Peel plan for a minimum density of 50 people and jobs/ha in the Designated Greenfield Area (D.G.A.). The Region's M.C.R. has identified an average minimum D.G.A. density of 70 people and jobs/ha across all D.G.A. lands in Peel with a variation in the average density by Area Municipality. The Region of Peel is planning for an average of 67.5 people and jobs/ha within the Town of Caledon's D.G.A. ^[23]

^[23] Region of Peel, M.C.R., Land Needs Assessment, based on addendum L.N.A. information received by the Town of Caledon.



The Region of Peel has identified the need for an urban Community Area Settlement Area Boundary Expansion to accommodate a population of 175,000 and 19,000 jobs to support the population on 2,870 ha in the Town of Caledon over the planning horizon.^[24]

2.3.2.2 *Employment Area*

As previously mentioned, the Growth Plan, 2019 does not identify a minimum Employment Area density target. The Region of Peel is planning for a density of approximately 24.8 jobs/ha for Employment Area Settlement Area Boundary Expansion lands in Caledon.^[25]

The Region of Peel has identified an urban Employment Area Settlement Area Boundary Expansion to accommodate 38,000 Employment Area jobs on 1,530 ha in the Town of Caledon over the planning horizon.^[26]

2.4 Local Planning Context

2.4.1 *Town of Caledon Official Plan*

As part of the M.C.R. and the Town's O.P. review process, Caledon is required to confirm its O.P. with the current version of Peel's Regional Official Plan. As previously discussed, the Growth Plan, 2019 requires municipalities to update their respective O.P.s to a 2051 horizon, including a review and evaluation of the minimum density and intensification targets as well as Schedule 3 population and employment forecast allocations, as part of the M.C.R. process.

In the Town of Caledon's current O.P. (Consolidation 2018), there is a hierarchy of settlements for growth and development.

^[24] Peel 2051 Regional Official Plan Review, Draft Proposed O.P. with Amendments, 5.6.20.14., p. 213.

^[25] Region of Peel, M.C.R., Land Needs Assessment, based on addendum information received by the Town of Caledon.

^[26] Ibid.



Rural Service Centres

These areas are compact, well-integrated rural towns on fully piped water and sewer services.^[27] Rural Service Centres are identified as Mayfield West, Bolton, and Caledon East. These areas are designated as primary growth areas and, as a result, most new residential and employment growth will be directed towards these areas.

Villages

Villages are primarily residential communities that are generally focused on a historic main street or crossroad. These areas contain one or more of the following municipal services: swimming pool, arena, library, fire hall, or community hall. There are two primary functions of villages. First, they provide an alternative lifestyle to Rural Service Centres, Hamlets, and Rural Lands. Second, they provide local convenience goods and services within the Village and to the surrounding area that complement the wider range of goods and services available in the Rural Service Centres. In Caledon, the settlements of Alton, Caledon Village, Cheltenham, Inglewood, Mono Mills, and Palgrave are designated as Villages.

Hamlets

Hamlets are small residential communities that are usually a cluster of houses around a small historic settlement. These areas are expected to accommodate minimal growth over the planning horizon. Hamlets typically rely on Villages and Rural Service Centres for services. In Caledon, Albion, Belfountain, Campbell's Cross, Cataract, Claude, Melville, Mono Road, Terra Cotta, and Wildfield are identified as Hamlets.

Industrial/Commercial Centres

These areas are generally small, mixed-use settlements that provide a small supportive function to Rural Services Centre for industrial and commercial development. The Industrial/Commercial Centres in Caledon are Sandhill, Tullamore and Victoria.

For the purposes of the Employment Strategy, employment growth will largely be directed to Rural Service Centres and Industrial/Commercial Centres, as this will utilize

^[27] Town of Caledon Official Plan (Consolidation 2018) section 4.1.1.3.1.



the existing transportation linkages and labour pool and capitalize on the proximity to markets such as Brampton and Vaughan.^[28]

^[28] Town of Caledon Official Plan (2018) section 5.5.1.



Chapter 3

Overview of Macro-Economics and Regional Non-Residential Real Estate Trends



3. Overview of Macro-Economics and Regional Non-Residential Real Estate Trends

In examining Caledon's employment lands, it is essential to understand the broader influences and factors that affect the regional economy as a whole. This Chapter examines recent macro-economic trends influencing labour force and employment trends at the world-wide, provincial, G.T.H.A., and Peel Region levels.

3.1 Global and National Economic Trends

Following steady economic growth since the world economy rebounded from the 2008/2009 financial crisis, the world changed dramatically in 2020. The December 2019 outbreak of coronavirus disease (COVID-19) was officially declared a global pandemic by the World Health Organization (W.H.O.) on March 12, 2020 and has inflicted rising economic and human costs throughout the world. In response to the threat of further escalation associated with the spread of the virus, governments around the world have implemented quarantine and physical distancing practices in what has been referred to as the "Great Lockdown."

The downward impact of these containment measures on global economic output, commodity prices, and consumer spending has been significant. Economic sectors such as travel and tourism, accommodation and energy have been hit particularly hard, largely due to containment measures. On the other hand, many other employment sectors (particularly knowledge-based sectors) that have been more adaptable to the current remote work environment have been less negatively impacted, and in some cases have prospered. Furthermore, required modifications to social behavior (i.e., physical distancing) and increased work-at-home requirements resulting from government-induced containment measures and increased health risks have resulted in significant economic disruption, largely related to changes in consumer demand and consumption patterns. Lastly, escalating tensions and constraints related to international trade have also begun to raise questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

Currently the level of sustained economic impact related to this "exogenous shock" to the global and Canadian economies is largely uncertain. As policy responses and vaccine efforts have been rolled out to pave the road for economic recovery, the rapid



spread and threat of new variants have increased the uncertainty as to when the pandemic can be overcome. Notwithstanding this, the global economy is on a path towards recovery, but it is generally clear that the longer the COVID-19 pandemic persists on an international scale, the longer the global recovery will take. After the global economy contracted by 3.1% in 2020, which represents a much more significant economic contraction than what was experienced during height of the 2008/2009 financial crisis, the latest International Monetary Fund (I.M.F.) World Economic Outlook is forecasting the global economy will grow 5.9% in 2021 and 4.9% in 2022. The volume of world trade (good and services) is forecast to rebound by 9.7% in 2021 and 6.7% in 2022 after experiencing a decline of 8.2% in 2020. Economic output for the advanced economies is anticipated to be back on its pre-pandemic growth path in 2022 and to exceed it by 0.9% by 2024.^[29]

For Canada's largest trading partner, the United States (U.S.), economic output was estimated to contract by 3.4% in 2020 and is expected to rebound by 6.0% in 2021 and 5.2% in 2022. The recovery of the U.S. economy will, in part, depend on the U.S. administration's response to dealing with the virus domestically, in conjunction with their approach to on-going international trade, protectionist policies and labour force supply. With respect to the national economy, Canada is expected to follow a similar path as the U.S., with output declining overall by 5.3% in 2020, and a projection to grow sharply by 5.7% in 2021 and 4.9% in 2022.

The long-term global and Canadian economic outlook is positive, but it is important to recognize that there are headwinds to be cautious of going forward. Global supply shortages of goods due to trade disruptions and labour shortages, pent-up demand from consumers, and increased commodity prices are resulting in multi-decade-high inflation rates.^[30] Record levels of public-sector debt due to pandemic response measures, and increasing household debt loads resulting from soaring housing prices in many areas of Canada are also a concern. Interest rate hikes are expected to help keep inflation levels in check, with Canada's inflation rate floating around 5% since late 2021, a level not seen since 2003.^[31] Subject to the influence of national and global

^[29] International Monetary Fund. World Economic Outlook, Recovery During a Pandemic, Health Concerns, Supply Disruptions, and Price Pressures. October 2021.

^[30] Ibid.

^[31] Financial Post, RBC Chief executive calls for 'rapid action' on interest rates to tame inflation. January 12, 2022.



monetary policy, high inflation levels and interest rate increases could result in potential setbacks in the recovery path towards a stable economy.

Due to the social and economic modifications previously stated, COVID-19 has accelerated changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. These trends are anticipated to have a direct influence on commercial and industrial real estate needs over both the near and longer terms. In light of these anticipated trends, it is important to consider the manner in which these impacts are likely to influence the nature of employment by type, as well as by place of work.

3.2 Planning within the Context of an Evolving National and Provincial Economic Outlook

3.2.1 Ontario Economic Outlook within the Canadian Context

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by gross domestic product (G.D.P.) output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector. This has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn. It is noted that these G.D.P. declines in the manufacturing sector had started to show signs of stabilization in the past several years, prior to the recent global recession of 2020.

Over the past decade, the Ontario economy experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding from 2013 to 2018, as illustrated in Figure 3-4. This economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar and the gradual strengthening of the U.S. economy.^[32] Growth in 2019 eased to 1.6%, largely as a result of a tightening labour market and slowing global economic growth.^[33]

^[32] Valued at approximately \$0.80 U.S. as of January 13, 2022.

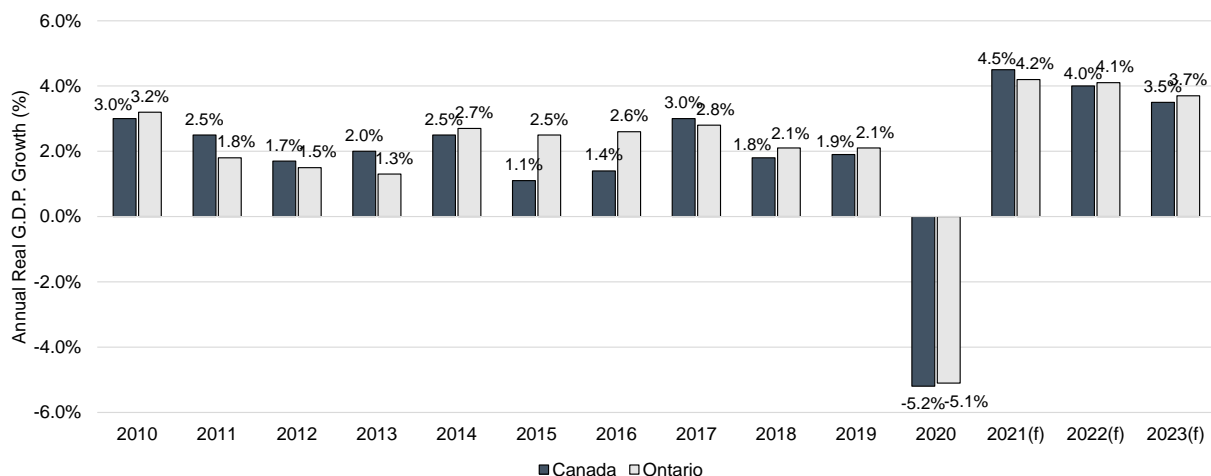
^[33] BMO Provincial Outlook, Spring 2019.



While the recent performance of the Ontario economy has remained relatively strong over the past several years through to early 2020, the COVID-19 pandemic posed significant economic impacts to the national and provincial economies. As illustrated in Figure 3-1, the Ontario economy is estimated to have contracted by 5.1% in 2020 before rebounding by 4.2% in 2021. BMO Capital Markets has forecast the Ontario economy will continue its momentum, growing by 4.1% in 2022 and 3.7% in 2023, while the overall Canadian economy is expected to grow by 4.0% in 2022 and 3.5% in 2023.

Increasing household debt loads caused by rising house prices in Ontario also continues to pose a risk to the overall economy, which is important to recognize when considering forecast labour force and employment growth trends. The sharp rise in Ontario's housing prices over the past decade, particularly in the Greater Toronto and Hamilton Area (G.T.H.A.), has contributed to record consumer debt loads and severely eroded housing affordability.

Figure 3-1
Province of Ontario and Canada
Annual Real G.D.P. Growth, Historical (2007 to 2020) and Forecast (2021 to 2022)



Note: 2021 to 2023 figures are forecast by BMO Capital Markets Economics.

Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, January 2022, by Watson & Associates Economists Ltd.



3.2.2 Emerging Industry Sector and Labour Force Trends

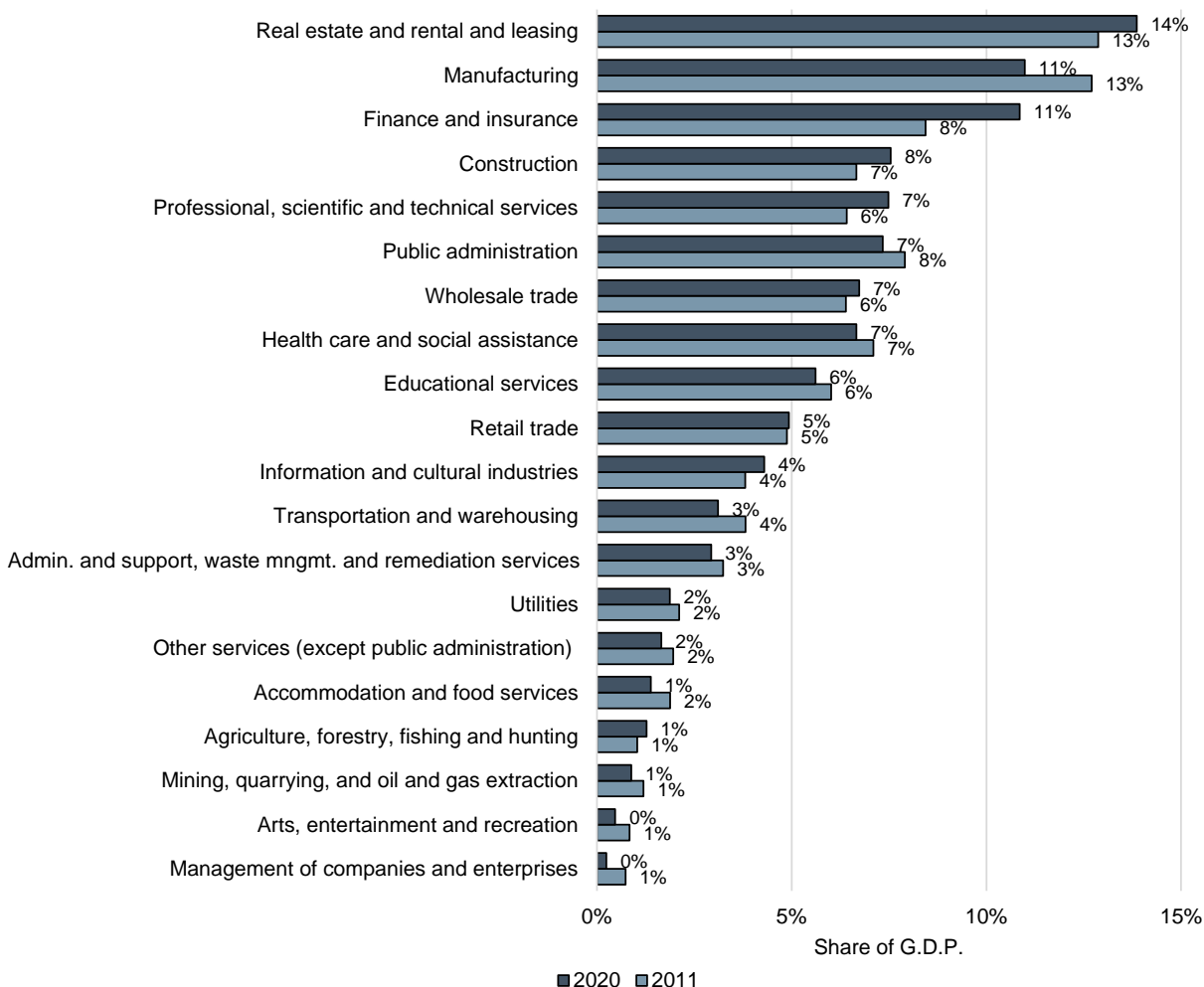
3.2.2.1 Ontario's Shifting Economic Structure

As previously mentioned, Ontario's economy is transitioning from goods to services production. As illustrated in Figure 3-2, the trend towards more knowledge-intensive and creative forms of economic activity is evident across many sectors within both the broader national and provincial economies as well as within the G.T.H.A. economy. Employment sectors that are anticipated to lead Ontario with respect to economic output and employment growth include financial services, information technology, business services, health care and social services, government, advanced manufacturing, energy, information and cultural industries, education, training and research, agri-business and tourism.^[34]

^[34] It is important to note that the manufacturing industry experienced a G.D.P. decline in 2020 due to the negative effects of COVID-19 and has been recovering, as illustrated in section 3.2.2.3.



Figure 3-2
Province of Ontario G.D.P. Growth by Industry, 2011 and 2020



Source: Derived from Statistics Canada G.D.P. by industry (chained to 2012 dollars) data, CANSIM Table 36-10-0402-010 by Watson & Associates Economists Ltd., 2021.

3.2.2.2 Regional Labour Force Trends

Figure 3-3 summarizes total labour force and unemployment rate trends for the Toronto Census Metropolitan Area (C.M.A.). Labour force data is not available for Peel Region post-2016, but it is captured in the broader Toronto C.M.A. Key observations include:

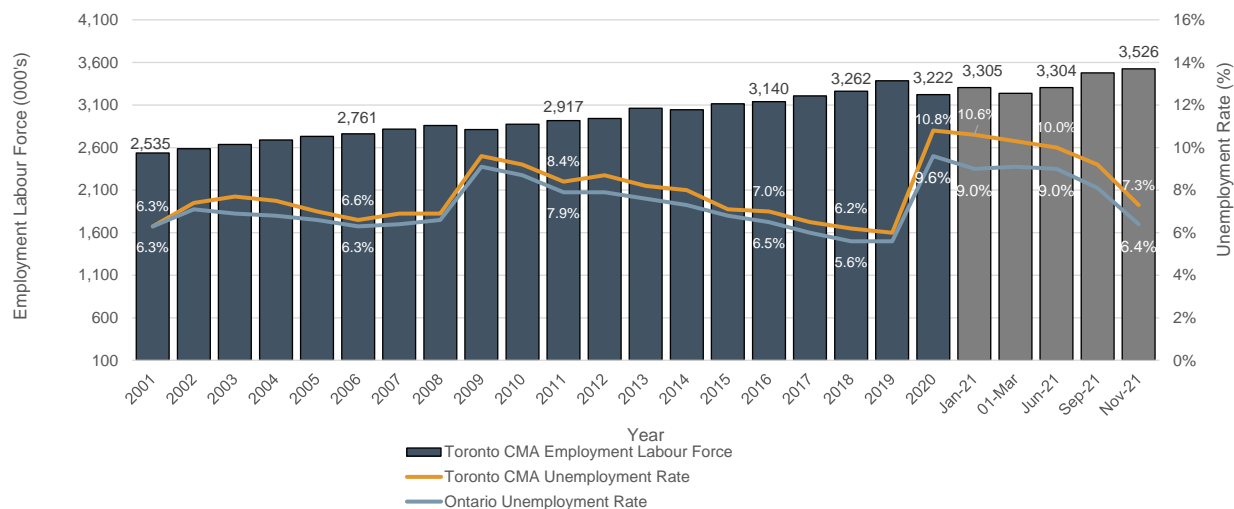
- The total labour force within the Toronto C.M.A. grew from 2.5 million in 2001 to 3.2 million in 2019, an increase of approximately 700,000. From 2001 to 2016,



the total labour force grew at a steady annual rate of 1.4%. Between 2016 and 2020, the labour force market slowed down, growing at an annual growth rate of 0.6%;

- Between 2001 and 2020, the unemployment rate in the Toronto C.M.A. peaked at 9.6% in 2009, coinciding with the 2008/2009 global economic recession, followed by a steady decline to a historical low of 6.0% in 2019;
- Despite the strong recent historical performance of the Toronto C.M.A. labour market, the unemployment rate peaked in 2020 at 10.8%% as a result of the COVID-19 pandemic;
- The unemployment rate has since declined and as of November 2021, it has decreased to 7.3%. According to Statistics Canada, the increase in unemployment due to the COVID-19 pandemic has been driven by temporary layoffs, indicating that much of the labour force is expected to return to their former place of work as restrictions are gradually eased.^[35]

Figure 3-3
Toronto C.M.A.
Total Labour Force and Unemployment Rate Trends, 2001 to 2021 Y.T.D.



Note: Statistics Canada Labour Force Survey and Census Labour Force statistics may differ.
Source: Toronto Census Metropolitan Area employed labour force and unemployment rate from Statistics Canada Table 14-10-0385-01, Province of Ontario unemployment rate from Statistics Canada Table 14-10-0082-01. Derived by Watson & Associates Economists Ltd., 2021.

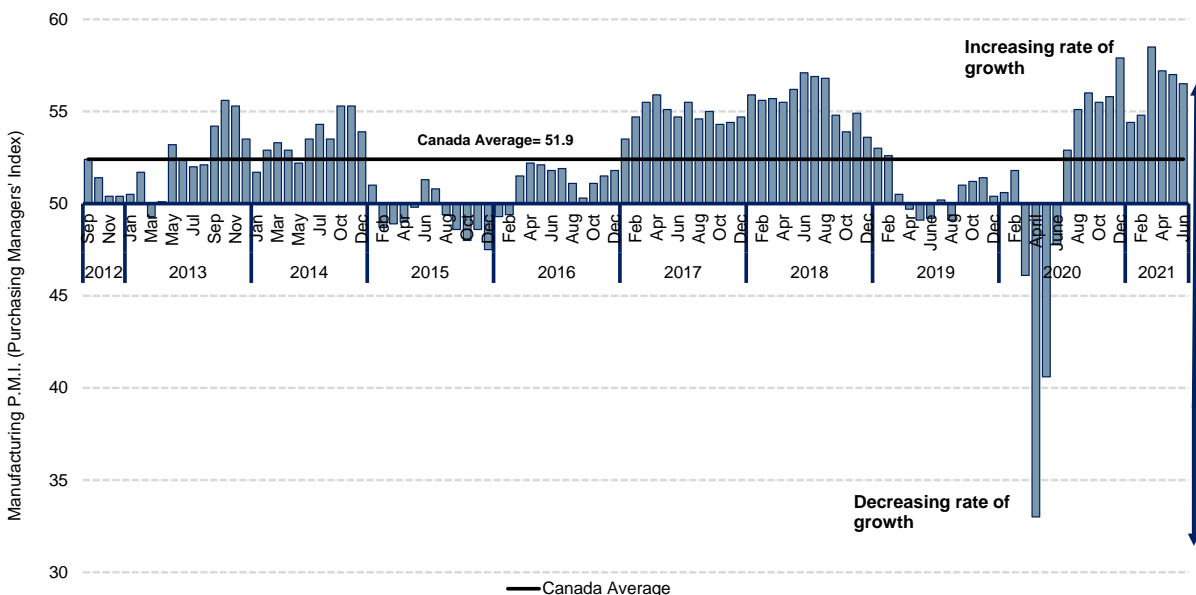
^[35] Statistics Canada, The Daily, Labour Force Survey, April 2020.



3.2.2.3 Outlook for the Manufacturing Sector

The Purchasing Managers' Index (P.M.I.) is a prevailing economic indicator for economic trends in the manufacturing and services sectors, which is based on purchasing managers' market condition outlook, and serves as a key measure of the direction of the manufacturing sector on a monthly basis. The P.M.I. is a number that ranges between 1 and 100. A P.M.I. value greater than 50 represents an expansion relative to the previous month, while a P.M.I. value less than 50 represents a contraction. Figure 3-4 summarizes the P.M.I. for Canada between 2012 and 2020 (April). As illustrated in Figure 3-4, the P.M.I. largely exhibited moderate to strong expansion between 2012 and 2018, except for 2015 as well as briefly in 2013 and early 2016. In contrast, the P.M.I. was noticeably below the historical average in 2019. As of March and April 2020, the P.M.I. indicated steep contractions in manufacturing and services-sector activity due to the negative effects of COVID-19 on the global economy, international trade, and the general demand for goods and services. This, however, has been followed by steady economic expansion in the manufacturing sector since July 2020.

Figure 3-4
Purchasing Managers' Index for Canada, 2001 to 2021 Y.T.D.

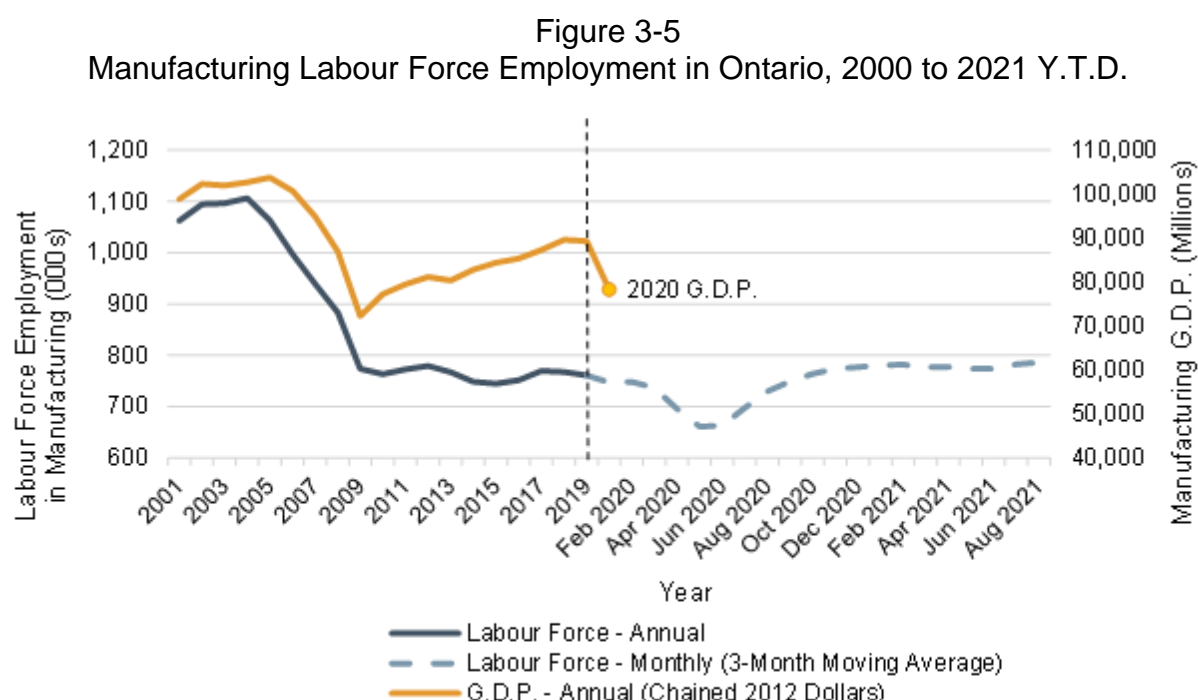


Note: Above 50.0 indicates growth from previous month, 50.0 indicates no change from previous month, and values below 50.0 indicate a decline from previous month.

Source: HIS Markit Canada, Canada P.M.I. Index, June 2012-June 2021 summarized by Watson & Associates Economists Ltd., 2021.



Figure 3-5 compares recent trends in manufacturing G.D.P. against recent labour force growth in the manufacturing sector. As summarized in Figure 3-5 **Error! Reference source not found.**, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009 with respect to labour force and G.D.P. Between 2009 and 2019, however, provincial labour force levels in the manufacturing sector stabilized, while G.D.P. output steadily increased. While showing modest growth since 2016, labour force levels in the manufacturing sector declined in early 2020 due to the impacts of COVID-19 but showed a sharp rebound between June 2020 and August 2020.



Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, and monthly data from Table 14-10-0091-01. Annual G.D.P. data from Statistics Canada Table 36-10-0402-01 by Watson & Associates Economists Ltd., 2021.

3.2.2.4 *Evolving Trends in Manufacturing*

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate a high rate of labour-force growth across the Province over the coming decades, as globalization has led to increased outsourcing of manufacturing processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, the nature of industrial



processes is rapidly shifting, becoming more capital/technology intensive and automated, with lower labour requirements. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive. As a result of increased efficiencies in the manufacturing sector, G.D.P. has increased relative to generally flat labour force trends as G.D.P. output per employee rises.

It is also important to recognize that emerging industrial sectors have siting, space and built-form requirements that are significantly different from traditional manufacturing operations. This may include integrated operations combining office, research and development, warehousing and logistics, and on-site manufacturing in a “campus-style” setting. Anticipating and responding to the evolving needs of industry will be necessary for the Town to better position itself for sustained growth, particularly in the advanced manufacturing sector and other emerging knowledge-based industries.

3.2.2.5 E-Commerce as a Major Disruptor for the Retail and Logistics Sector

Retail e-commerce sales have risen steadily, with the proportion of online sales to total retail trade rising from 2.4% in 2016 to 6.3% percent in 2020.^[36] Since May 2020, there has been subsequent temporary lockdowns. It is anticipated that e-commerce levels will eventually drop with the gradual re-opening of stores, restaurants and other service commercial uses in Canada post the COVID-19 pandemic. Further, the digital impact of retail sales is even greater with mobile purchasing platforms (e.g., uberEats, Skip the Dishes) that support retail sales of local retailers by providing alternative platforms for purchasing products and services. The rise of e-commerce has reduced the demand for retail square footage, in particular retail space for goods-based retailers.^[37]

Increasing growth in e-commerce is also having a significant impact on employment growth and land demand related to the logistics sector. Delivery expectations within this sector are increasing on an annual basis. As delivery times decrease, it is anticipated

^[36] Derived from Statistics Canada. Table 20-10-0072-01 Retail e-commerce sales.

^[37] Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores, home improvement stores and stores selling general merchandise, apparel and furniture.



that demand for regional fulfilment centres will increase. Further, it is estimated that 25% to 30% of online merchandise is returned which is also driving the need for reverse logistics and return centres.

3.2.2.6 Potential Impacts of Technology on Commercial Services

Digital and mobile technologies are making it easier to access goods and services on-demand which has led to alternative platforms to purchase products and services. Among these platforms are those that support the sharing economy which provides opportunities for individuals to earn an income by leveraging under-utilized assets. These platforms are providing customers with an alternative to traditional buy/selling platforms, including those in hospitality (e.g., hotels and taxis) and in office leasing (office sharing). It is anticipated that further advancements in the sharing economy will have increasingly negative impact on the need for non-residential building space and continued growth in precarious employment. Other alternative purchasing platforms are providing income earning opportunities for individuals to perform services of tasks that are typically not outsourced by households (e.g., assembling furniture, small household repairs, picking up food at fast food restaurants, meal preparation, grocery pick-up and delivery).

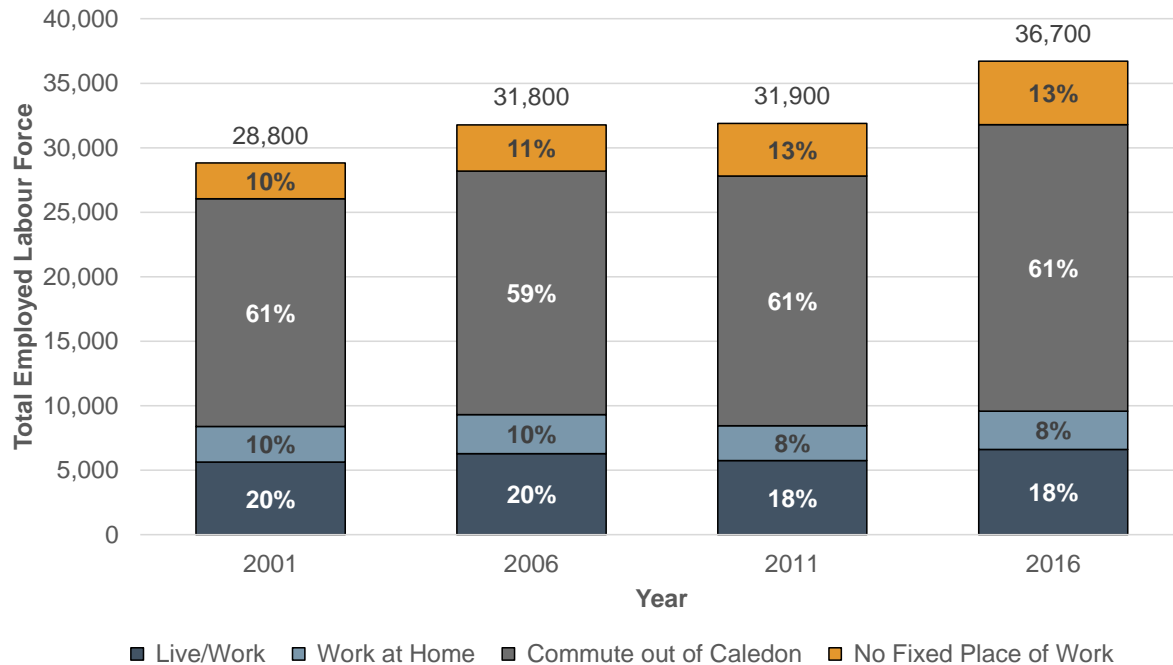
3.2.2.7 Rising Shares of Off-Site and Work at Home Employment

Over the 2001 to 2016 period, the percentage of Caledon's labour force defined as having a usual place of work has steadily increased. The share of work at home employment, however, has experienced a slight decrease falling from 10% in 2001 to 8% in 2016. This is offset by a gradual increase in the share of off-site employment, also referred to as employees with no fixed place of work (N.F.P.O.W.), as summarized below in Figure 3-6.^[38]

^[38] Statistics Canada defines employees with no fixed place of work as “persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”



Figure 3-6
Town of Caledon
Employed Labour Force by Place of Work, 2001 to 2016



Source: Data derived from Statistics Canada Census Profiles by Watson & Associates Economists Ltd., 2021.

Within the Town of Caledon, the rising share of labour related to N.F.P.O.W. has been primarily driven by steady growth in the transportation and construction sectors which are typically characterized as having a higher percentage of off-site employees. Technological innovation and improved broadband regional telecommunications have also been, and will continue to be, key drivers of economic expansion in knowledge-based sectors as well as the steady rise of the gig economy.^[39] One of the priorities that has been identified in the Town's Economic Development Strategy is enhancing investment readiness, and one of the action items that has been identified is to advocate for expansions and upgrades to the Town's broadband infrastructure with an initial focus on improving connectivity in the Town's Employment Areas.^[40] Looking forward, continued advances in technology and telecommunications (e.g., 5G

^[39] The gig economy is characterized by flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform.

^[40] Caledon 2020-2030 – An Economic Development Strategy for the Town of Caledon.



technology) are anticipated to further enable remote work patterns and ultimately increase the relative share of off-site employment over the long term. Over the coming decades, work at home and N.F.P.O.W. employment is generally expected to steadily increase as a result of these trends. Demographics and socio-economics also play a role in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in Peel Region and the Town of Caledon will utilize technology to allow them to supplement their income in more flexible ways in contrast to traditional work patterns.

3.2.3 Planning for the New Economy

3.2.3.1 Planning for Industrial Sectors

Recognizing the recent structural changes in the regional economy, there is a need for the Town of Caledon to ensure that the amount, type, and location of its established and planned Employment Areas are well aligned with anticipated market demand. This requires that near-term (i.e., shovel-ready lands) and longer-term Employment Area land needs are adequately addressed. Further, it is important that municipalities provide a policy framework to encourage industrial activities and developments that support resilience to climate change and sustainability.

It is also important that the Town's Employment Areas are planned and designed to accommodate a broad range of established industrial sectors related to advanced manufacturing, Goods Movement, construction, utilities, other emerging industrial sectors, as well as employment-supportive uses. Employment Areas should also offer competitive attributes and supportive infrastructure, urban amenities and synergies to attract the growing knowledge-based sector. Two key real estate trends that influence the planning of Employment Areas in today's economy are explored below.

Integrated Development in the Advanced Manufacturing Sector

Many of the growing sub-sectors in advanced manufacturing, such as energy, automotive, technology and clean tech, require integrated operations on larger sites in a "campus-style" setting. These integrated facilities often accommodate a combination of office, research and development, warehousing and logistics, and on-site manufacturing.



To address the broad needs of industry, a range of Employment Areas by site size, access, designation/zoning, and surrounding land use are required which provide significant land area to accommodate mid- to large-scale uses with opportunities surface parking and future expansion potential. On average, employment density levels for integrated office/distribution and training facilities are much lower than standalone Major Office developments. Given the unique operational requirements of these facilities, such uses often cannot be accommodated in downtown or mixed-use office settings. In industrial/business parks, prestige industrial uses are often positioned at gateway locations (i.e., at major highway interchanges) with direct highway access/exposure as well as good connectivity to arterial roads.

Growing Demand in the Goods Movement Sector

Increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas. Across North America, the Goods Movement industry is continuously evolving at a rapid pace responding to growing consumer demand as well as increased expectations with respect to speed of delivery. As discussed below, e-commerce and technological improvements represent the biggest drivers of change in the Goods Movement industry, driven by the rapid growth of mobile technology.

3.2.3.2 Planning for Knowledge-Based Sectors

As previously noted, recent employment growth has been increasingly driven by growth in the knowledge-based or creative class economies, including employment sectors such as advanced manufacturing, professional, scientific and technical services, finance and insurance, real estate, information and culture, health care and social assistance, and education. With an increasing emphasis on these knowledge-based sectors, Major Office, flex office and multi-purpose facilities encompassing office and non-office uses are becoming increasingly dominant built forms.

Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores “place making” as an increasingly recognized and important concept in creating diverse



and vibrant workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met. This is particularly relevant in compact, pedestrian-oriented, mixed-used environments that integrate office commercial, residential and other community uses with public open spaces. To address the broad needs of industry, a range of employment and commercial areas by site size, access, designation/zoning and surrounding land use should be considered within both Employment Areas and Community Areas. The Town should plan to accommodate prestige employment uses and major office uses in areas that back onto environmental open spaces and linkages to trail systems to allow for unique place-making opportunities.

3.2.3.3 Planning for Population-Related Employment Opportunities

Provincial, Regional and local planning policies require the Town of Caledon to plan for “complete communities” that are compact, well-connected places with a clustering of a diverse mix of land-uses; this includes a range of housing types, shops, services, local access to food, schools and day care facilities, employment, greenspaces, parks and pathways. Complete communities support active transportation and provide opportunities to support existing or future transit.

Recent trends in the retail sector support policy direction for complete communities, as market demand for large tracts of single-purpose non-residential uses, such as retail big-box uses is softening. E-commerce is impacting the form of commercial uses with a greater focus on smaller commercial units (less than 2,000 sq.m/22,000 sq.ft.) that serve the daily needs of nearby residents (e.g., food stores, restaurants, personal services and drug stores), as well as commercial uses that provide experiences. It is important to recognize, however, that “bricks and mortar” retail is still the most effective means of consumer distribution. The continued growth in e-commerce is requiring retailers to remodel their supply chains and retail networks through micro-distribution centres. Micro-distribution centres involve utilizing small, highly automated storage facilities close to the end consumer to reduce the cost and time it takes to deliver goods. A key focus is leveraging existing retail stores to accommodate the “last mile” of e-commerce logistics. From a planning perspective this has the potential to undermine planning objectives of place-marking and active transportation, as these retail uses increase warehousing/storage function of site and add drive-thru or curb-side lanes. On the other hand, retail sites supporting e-commerce redirect delivery vehicles away from residential and mixed-use neighbourhoods.



3.2.3.4 *Planning for Rural Opportunities*

While provincial policies require municipalities to direct the majority of population and employment growth to settlement areas, a key provincial policy thrust is to support the viability of rural areas. Further, as noted in the P.P.S., 2020, opportunities to support a diversified rural economy should be promoted by protecting agricultural and other resource-related uses and directing non-related development to areas where it will minimize constraints on these uses.

Rural employment generally comprise activities related to agriculture, resources and recreation/tourism. The agriculture sector is seen as a key growth sector within the province due to its opportunity to accommodate diversification and value-added products and services. Further, the vibrance of the agriculture sector is critical in securing the Province's food supply. The agriculture sector of the future is envisioned to be a sector that embraces technology and environmental sustainability; supports a broader range of related activities; and provides better connections with the surrounding urban economy. Rural Employment Areas are used by municipalities to facilitate the development of rural industrial activities, including those which are related to the agricultural sector. Rural Employment Areas also provide for the cluster of rural activities that support diversification across the agriculture system. Supporting the agriculture sector within the local municipality is not limited to the rural area and also should include opportunities for activities in the urban area that provide connections with the agricultural sector, such as food processing and agriculture research and development.

The P.P.S., 2020 supports on-farm diversified uses which allows farms to explore options for generating income to help support agriculture for the long term. Diversification is key for the agriculture sector for economic reasons, but also to provides resiliency from increased unpredictability in weather conditions due to climate change. The ability to supplement income of agricultural operations provides resilience to farmers during tough conditions. The policies in the P.P.S., 2020 allow for on-farm diversified provided that the uses are on a farm and follow the provincial and local criteria.^[41] According to O.M.A.F.R.A. Guidelines on Permitted Uses in Ontario's Primary Agriculture Areas, on-farm diversified uses are required to be a secondary function related to the primary function of the farm, limited in area and includes

^[41] Provincial Policy Statement, 2020, policy 2.3.3.1.



industries such as home occupations, agri-tourism and uses that produce value-added agricultural products.^[42]

3.3 Non-Residential Real Estate Market Trends and Economic Growth Outlook within the Broader Regional Economy

3.3.1 *Canada's Economic Powerhouse – Greater Toronto Hamilton Area (G.T.H.A.)*

In many respects, the Region of Peel's long-term population and economic growth potential is largely tied to the success of the G.T.H.A. economy as a whole. This region represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The G.T.H.A. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region.

With a robust economy and diverse mix of export-based employment sectors, the G.T.H.A. is highly attractive on an international level to new businesses and investors. The G.T.H.A. also has a strong appeal given the area's regional infrastructure (i.e., Toronto Pearson International Airport (T.P.I.A.), other regional airports, provincial highways, inter-modal facilities), access to labour force, post-secondary institutions and proximity to the U.S. border. In turn, this continues to support steady population and housing growth within the City of Toronto and the G.T.H.A. "905" municipalities, largely driven by immigration as well as and inter and intra-provincial net migration (i.e., in migration from other provinces as well as from other municipalities in Ontario).

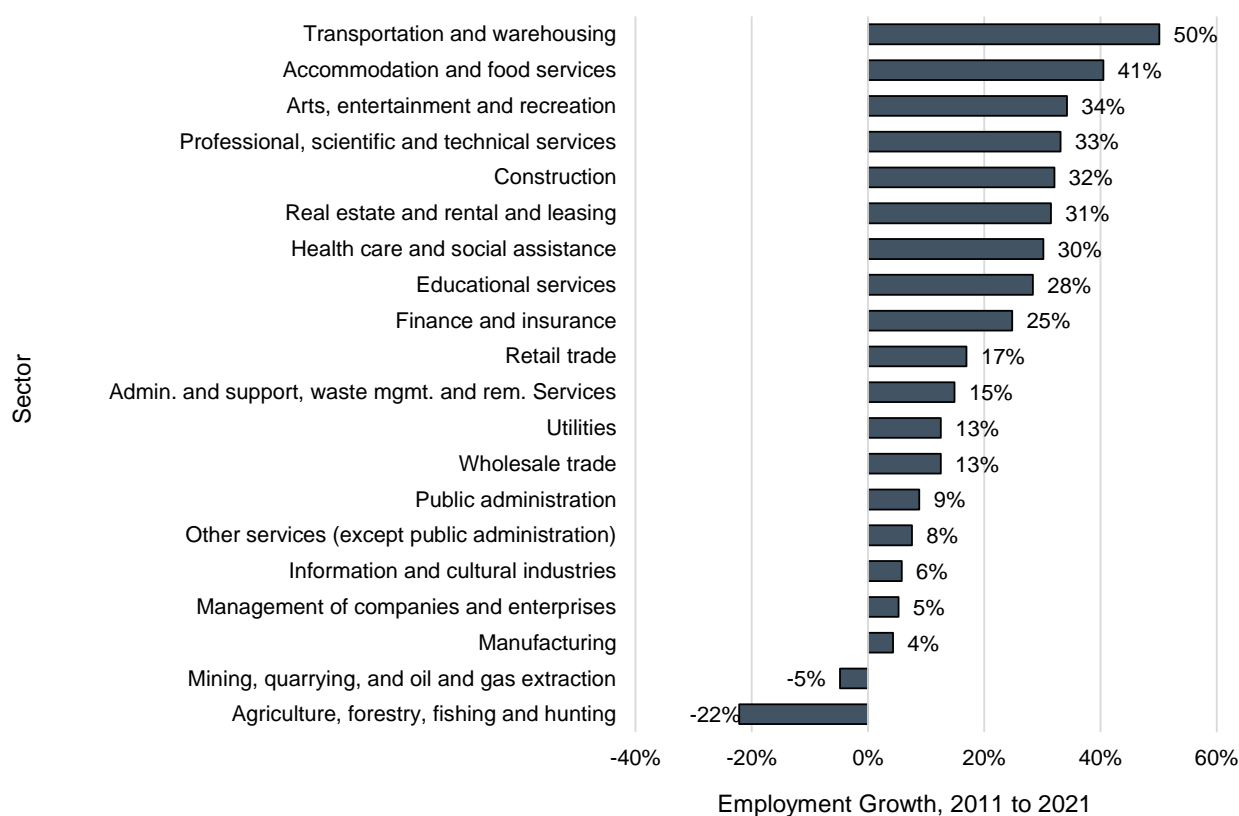
The diverse and highly competitive G.T.H.A. economy has fueled a steady level of employment growth over the past decade in almost all major sectors of the good producing and service providing sectors of the economy. Within the service sector, economic growth has been particularly strong for small- to medium-scale knowledge-based businesses that are focused on innovation and entrepreneurship. With respect to the retail sector, employment growth has been strongest in the accommodation and food services segment.

^[42] Guidelines on Permitted Uses in Ontario's Prime Agriculture Areas, Publication 851.



Similar to the provincial economy as a whole, the nature of the G.T.H.A. economy is changing. Over the past decade, the composition of the G.T.H.A.'s employment has gradually shifted from a goods-producing economy to a services-producing economy, as summarized in Figure 3-7. This shift has led by employment growth in a range of “knowledge-based” and “creative-class economy” sectors including arts entertainment and recreation, health care and social services, real estate and rental leasing, professional, scientific and technical services; education services and financial services; and information and cultural industries as illustrated in Figure 3-7.^[43]

Figure 3-7
G.T.H.A. Employment Growth by Sector, 2011 to 2021



Note: Figures include employed and self-employed jobs.

Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2021.

^[43] Richard Florida, *The Rise of the Creative Class*. 2002



The G.T.H.A. has also experienced significant employment growth in the Goods Movement sector over the past decade comprised of transportation/warehousing and wholesale trade.^[44] This sector is highly concentrated within the Region of Peel, and to a lesser extent, York and Halton Region, largely due to the proximity of these municipalities to the T.P.I.A. Other regional infrastructure attributes, including access to 400-series highways as well as existing and planned intermodal facilities in Brampton, Vaughan and Milton, have and will continue to play a key role in driving demand within this sector across the G.T.H.A. As previously discussed, increased outsourcing of manufacturing production to emerging global markets continues to drive the need for new consolidated, land extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally in greenfield Employment Areas.

Figure 3-8
Greater Toronto Hamilton Area
Employment Trends by Major Sector, 2011 to 2021



Note: Includes employed and self-employed jobs.

Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2021.

^[44] For the purpose of this study, the Goods Movement Sector is defined as sectors including Wholesale Trade as well as Transportation and Warehousing as defined by the North American Industry Classification System (N.A.I.C.S) coding system. Businesses that have a secondary function related to Goods Movement are not included.



3.3.2 Long-Term Population and Employment Growth Outlook Greater Toronto and Hamilton Area

Over the next two decades, considerable new residential and non-residential growth is anticipated across the G.T.H.A. In accordance with the Provincial Growth Plan,^[45] the population of the G.T.H.A. is forecast to increase from 7.18 million in 2016 to 11.17 million in 2051, an increase of close to 4 million persons. The area is also forecast to add approximately 1.8 million jobs over the same time period. This represents a substantial increase in population and employment relative to other North American metropolitan regions of comparable population. The strong growth potential anticipated for the G.T.H.A. is largely tied to the strength and diversity of the area's industry clusters.

Overall, there is a diminishing employment land supply relative to demand in the large G.T.H.A. markets, including the City of Vaughan, City of Mississauga, and the City of Brampton. As the more mature areas of the G.T.H.A. gradually build out, increasing outward growth pressure will be placed on the remaining vacant greenfield Employment Areas of the G.T.H.A. This is particularly important for municipalities such as the Town of Caledon, which is anticipated to accommodate significant new development within its greenfield Employment Areas over the coming decades, combined with modest intensification within its established Employment Areas.

3.4 Recent Trends in Industrial/Office Development Activity for the G.T.H.A.

The supply of industrial and office commercial space across the G.T.H.A. is significant, having the third and sixth largest inventories, respectively, in North America.^[46] The following provides commentary on the characteristics of the G.T.H.A. industrial and

^[45] Growth Plan for the Greater Golden Horseshoe, May 2017. Ontario Ministry of Municipal Affairs.

^[46] Source: Derived from Cushman & Wakefield Toronto Industrial Market Beat and U.S. Industrial Market Beat Snapshot, Q3 2017 and Cushman & Wakefield Toronto Office Market Beat and U.S. Office Market Beat Snapshot, Q3 2017 by Watson & Associates Economists Ltd.



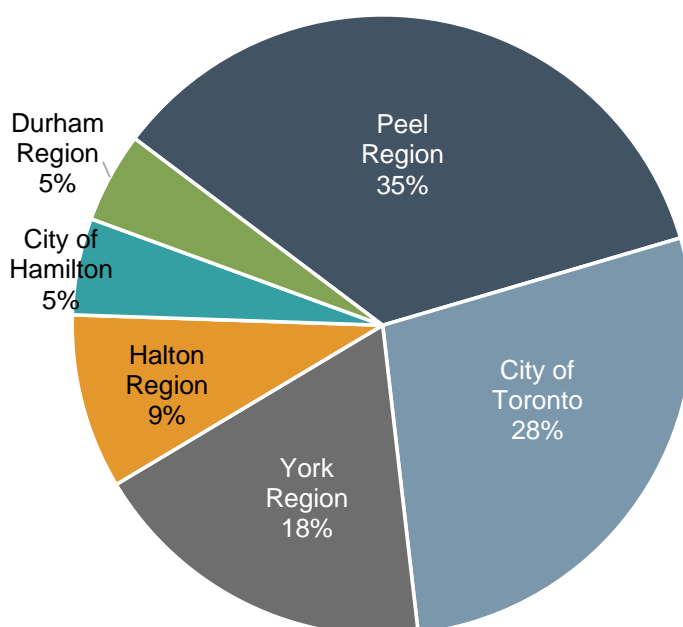
office market as well as recent development trends by upper-tier/single-tier municipality within this geographic area.

3.4.1 Overview of Industrial Real Estate Market

The industrial market in the G.T.H.A. is comprised of 869 million sq.ft. (81 million sq.m) of industrial space, as expressed in gross floor area (G.F.A.), with nearly two-thirds located in Peel Region and the City of Toronto, as illustrated in Figure 3-9.

Comparatively, Peel Region has an existing industrial base of 306 million sq.ft. (28 million sq.m.) of G.F.A., which comprises 35% of the G.T.H.A.'s total inventory.

Figure 3-9
Share of G.T.H.A. Industrial G.F.A. Inventory
by Upper/Single Tier Municipality



Source: Data derived from Q3 2021 Toronto Industrial Market Report by Colliers, summarized by Watson & Associates Economists Ltd., 2021.

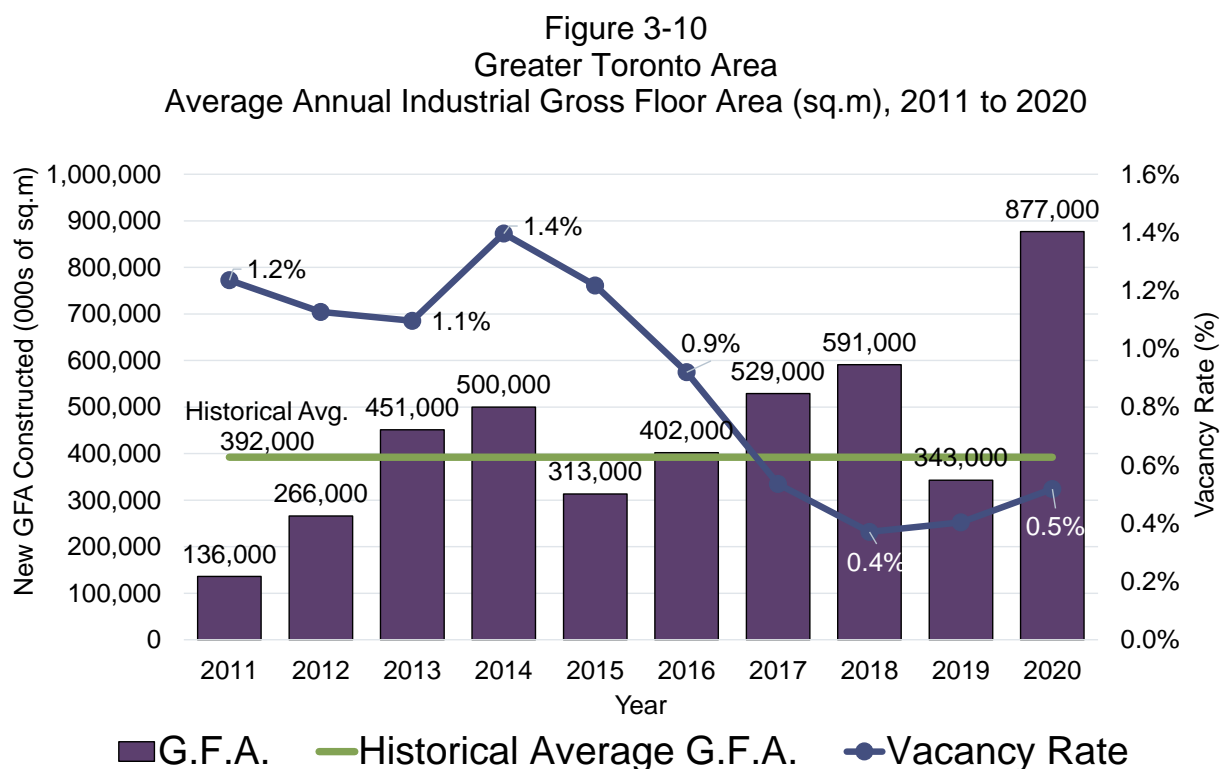
With respect to industrial building development, the G.T.H.A. has averaged 4.7 million sq.ft. (441,000 sq.m) of G.F.A. annually over the 2011 to 2020 period (refer to Figure 3-10). The G.T.H.A. experienced a sharp drop in industrial development activity after the 2008/2009 global economic recession, and has been steadily rebounding over the last decade. Since 2011, annual industrial development activity has increased from 1.5



million sq.ft. (136,000 sq.m) to a high of 9.8 million sq.ft. (917,000 sq.m) as of the third quarter in 2021. Coinciding with the increase in industrial development activity since 2011, G.T.H.A. industrial vacancy rates have steadily declined between 2011 and 2020, which now sit a near historic lows 0.5% in 2020, as summarized in Figure 3-10.

Relatively low industrial vacancy rates currently experienced across the G.T.A. are indicative of a relatively strong industrial market which is facing supply challenges.

Over the past five years, industrial development has been largely oriented to large-scale industrial buildings housing wholesale trade, transportation/warehousing and multi-tenant industrial condominiums, accommodating a range of industrial and non-industrial uses. As remaining vacant industrial sites continue to develop across the G.T.H.A, future development opportunities for new large-scale industrial development within this region are steadily diminishing, particularly in the largest urban centres of the G.T.H.A.



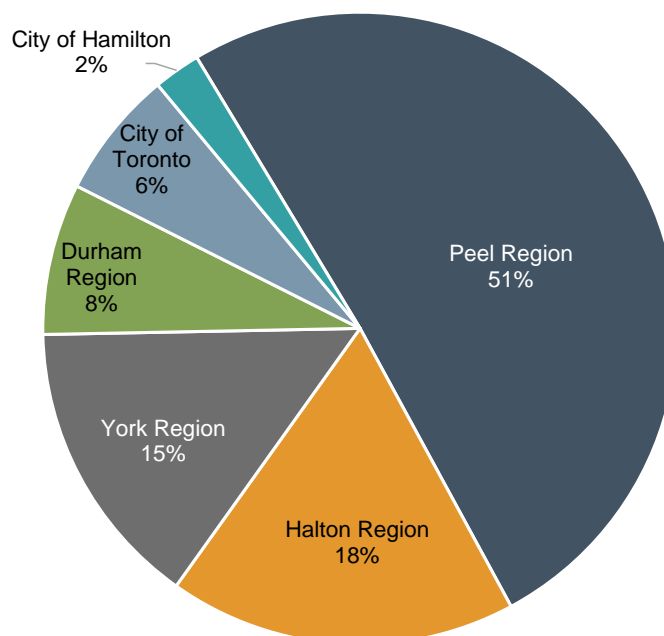
Source: Data from Colliers International compiled by Watson & Associates Economists Ltd., 2021.

Over the 2011 to 2020 period, Peel Region accommodated over half (51%) the G.T.H.A.'s industrial development, as illustrated in Figure 3-11. In comparison, Halton



Region accounted for 18%, York Region 15%, Durham Region 8%, City of Toronto 6%, and the City of Hamilton 2%. The majority of recent industrial development in the G.T.H.A. has been focused largely along the Highway 401 corridor in Mississauga, Brampton and Milton, and in the Highway 400/407 area of Vaughan.

Figure 3-11
G.T.H.A. Industrial Development by Geographic Area,
2011 to 2020



Source: Data from Colliers International compiled by Watson & Associates Economists Ltd., 2021.

3.4.2 Overview of Office Real Estate Market

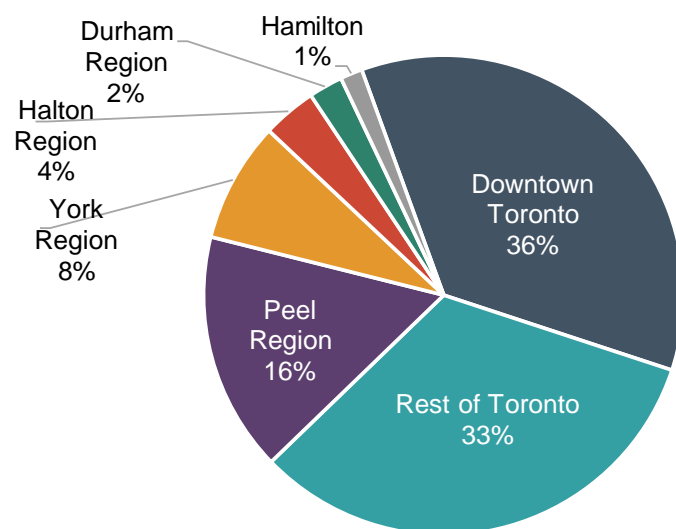
With respect to the office market, the G.T.H.A. contains 256 million sq.ft. (24 million sq.m) of office space.^[47] Of this total, over two-thirds (69%) are located within the City of Toronto, with over half located in the downtown core, as illustrated in Figure 3-8. Outside the City of Toronto, Major Office clusters are located in the 905 area, including Peel Region (Mississauga Airport Corporate Centre, City Centre and Meadowvale),

^[47] Derived from Colliers International 2020 data, except data for the City of Hamilton which was derived from CBRE Office Vacancy & Rental Rate Table Hamilton Q3 2019.



York Region (Highways 404 and 407 in Markham and Richmond Hill, and the Highway 400 Corridor in Vaughan), and Halton Region (Q.E.W. Corridor in Burlington and Oakville). Outside of the City of Toronto, Peel Region's share of the G.T.H.A. Major Office market is the second largest, however only representing 16% of total building G.F.A.

Figure 3-12
Share of G.T.H.A. Major Office G.F.A. Inventory
by Upper/Single-Tier Municipality



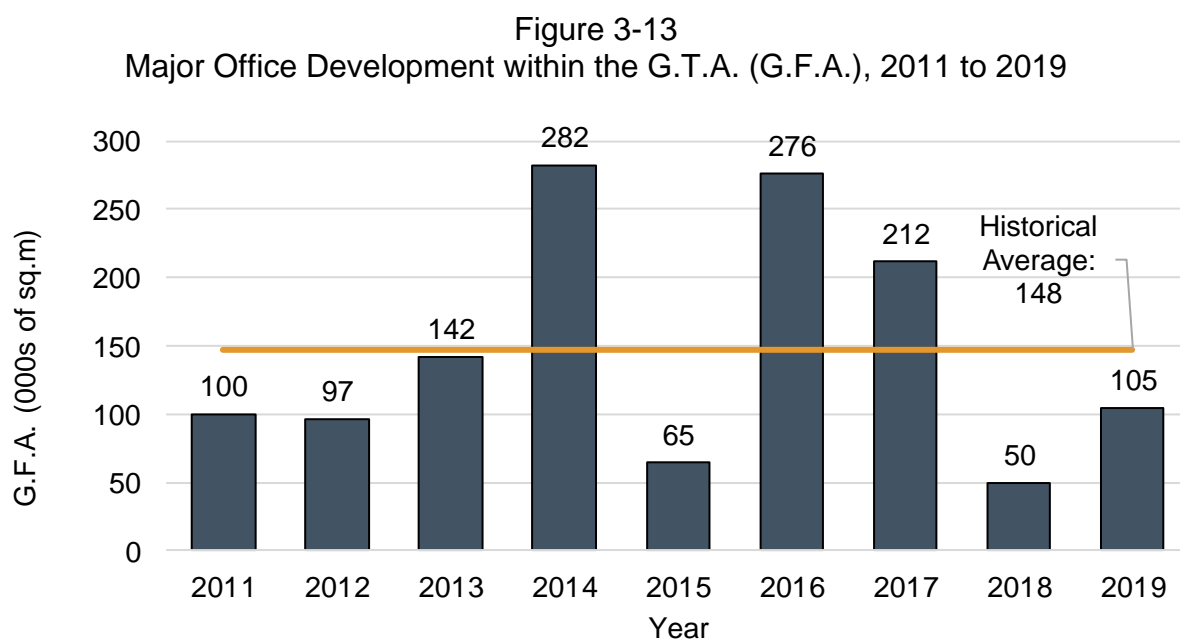
Source: Data from Colliers International with exception of Hamilton from CBRE compiled by Watson & Associates Economists Ltd., 2020.

Over the 2011 to 2019 period, Major Office development activity in the G.T.H.A. has averaged 1.6 million sq.ft. (148,000 sq.m) per year,^[48] as summarized in Figure 3-13. Major office development has exhibited relatively strong growth throughout the past decade. Major office development over the past decade has been concentrated within the Toronto downtown core, as well as in Vaughan, Markham, Mississauga along the Highway 401 corridor, and the Q.E.W. corridor in Oakville. Over this period, office development activity in the G.T.H.A. has shifted increasingly to downtown Toronto at the expense of suburban locations.

^[48] Based on building completions market data from Colliers International. Excludes City of Hamilton for which data was unavailable.



Historically, the vast majority of suburban office development has been accommodated within Employment Areas; however, market prospects for conventional standalone suburban office development within Employment Areas is gradually diminishing, as demand shifts to more urban and mixed-use environments. Demand for office space within Employment Areas is increasingly single-tenant and integrated with multi-purpose facilities (e.g., R&D, training centres, wholesale trade) often in campus-type settings. Further, there are growing opportunities for office development within innovation districts located on employment lands which have direct synergies with knowledge-based clusters, as well as health and educational infrastructure.



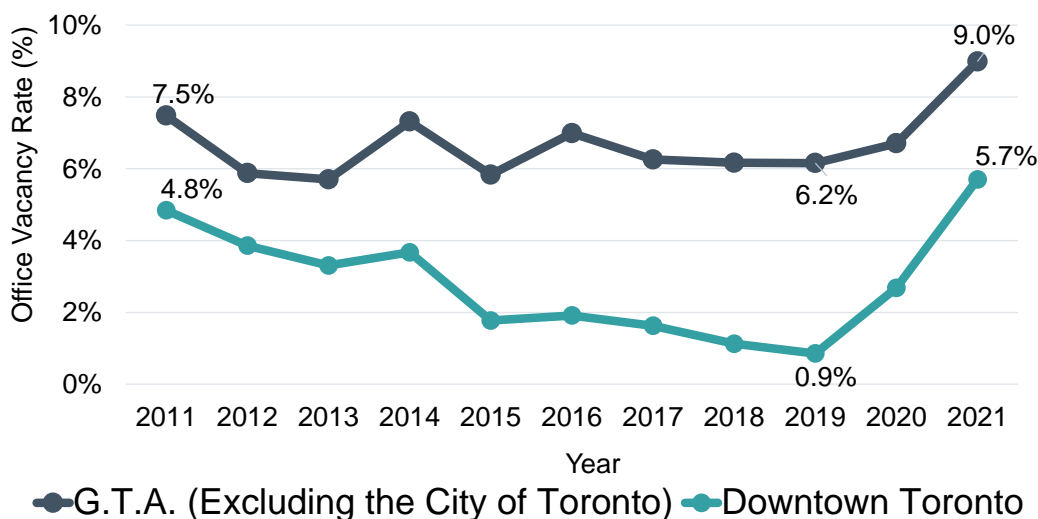
Source: Data from Colliers International compiled by Watson & Associates Economists Ltd., 2020.

The Major Office vacancy rate in the G.T.A. averages 5.7% in Downtown Toronto and 9.0% in the rest of the G.T.A.^[49] The rise in remote working/work at home in office-based sectors during the pandemic has had an impact on vacancy rate, particularly in urban locations. Pre-pandemic office vacancy rates in Downtown Toronto were at an all-time low less than 1.0% in 2019. Vacancy rates in the rest of the G.T.A. have averaged been between 6.0% and the 9.0% between 2011 and 2021.

^[49] Derived from Colliers International 2020 data, except data for the City of Hamilton which was derived from CBRE Office Vacancy & Rental Rate Table Hamilton Q3 2019.



Figure 3-14
Peel Region and G.T.A.
Class-A Office Vacancy Rates
2011 to 2019



Source: Derived from Colliers International data by Watson & Associates Economists Ltd., 2021.
Note - 2021 reflects data from Q1 and Q2.

3.5 Addressing Region of Peel Economic Opportunities

Similar to the G.T.H.A. as whole, the Region has also experienced strong employment growth in a number of other servicing-providing and goods-producing sectors, such as transportation and warehousing; administrative support, waste management and remediation services; construction; management of companies and enterprises; health care and social assistance; accommodation and food services; and professional, scientific and technical services to name a few. The Goods Movement sector forms an integral part of Peel Region's existing employment base and experienced more employment over the past decade than any other employment sector in Peel Region.

To assess the relative strength of business growth within Peel Region, Figure 3-16 examines employment growth by industry sector over the 2011 to 2019 period in the Region, relative to Ontario. The employment growth rate in Ontario from 2011 to 2019 is applied to 2011 employment in Peel Region to generate what the expected employment in Peel Region in 2019 would be if it grew at the same rate as Ontario. The actual employment is compared to expected employment in 2019, resulting in a negative or positive value. This comparative share analysis helps identify how much

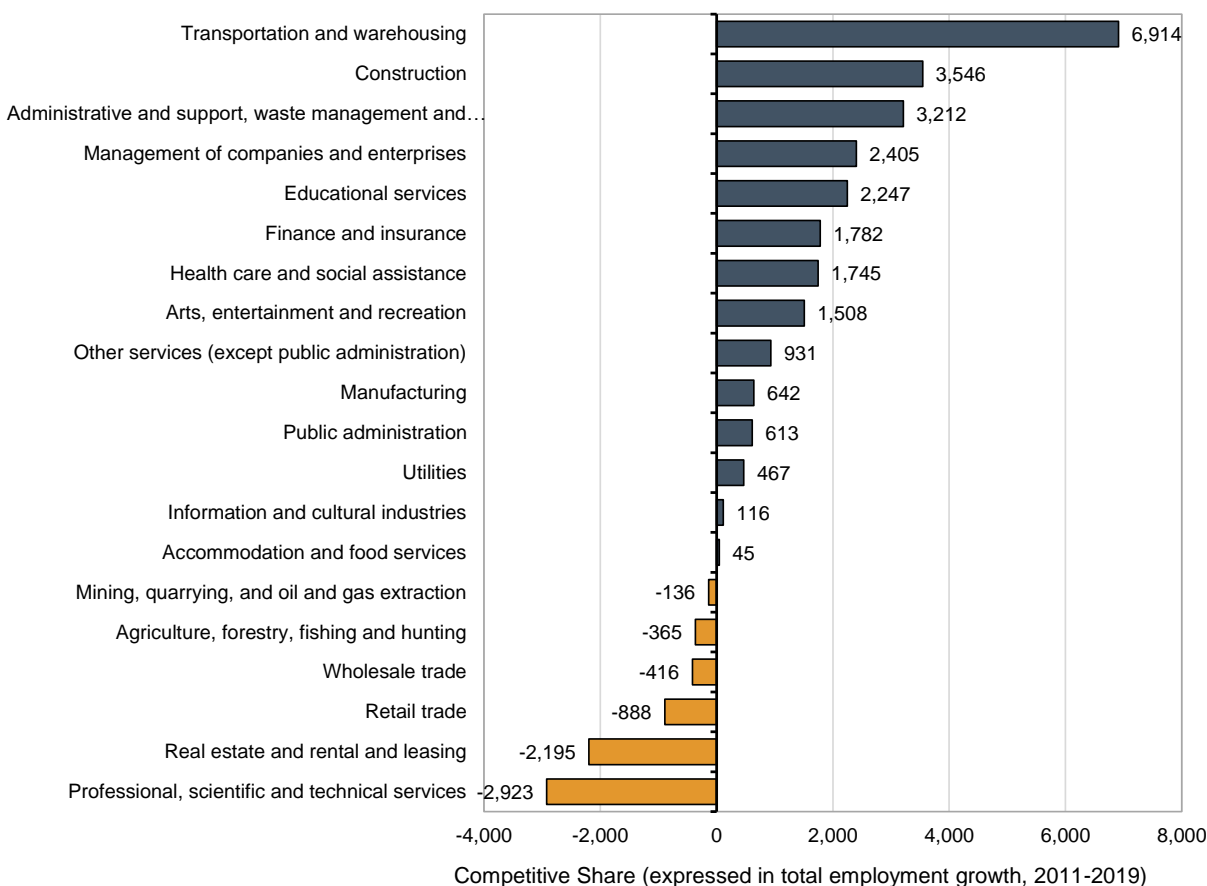


faster or slower employment is growing in Peel Region relative to Ontario as a whole, by sector. Industry sectors that generate a strong positive value suggest areas where Peel Region potentially has a competitive advantage relative to the surrounding market with respect to business growth. On the other hand, industry sectors that exhibit a negative value suggest areas where Peel Region may be at a competitive disadvantage to its neighbouring municipalities.

As illustrated in Figure 3-15, a number of sectors have exhibited a significantly stronger rate of employment growth relative to the province. Within the goods-producing related sector which is part of the export-oriented economy, transportation and warehousing has shown the highest rate of employment growth of any industry relative to Ontario, while manufacturing has shown moderately higher growth. Other sectors with higher rates of growth include construction, administration and support, waste management, and remediation services, management of companies and enterprises, educational services, finance and insurance health care and social assistance and arts, entertainment and recreation. Over the same period, Peel Region has experienced a relatively slower rate of employment growth within wholesale trade, retail trade, real estate and rental and leasing, and professional, scientific and technical services when compared to the rest of Ontario.



Figure 3-15
Peel Region Competitive Share Growth Analysis Relative to Ontario, 2011 to 2019



Source: Derived from EMSI data (employees only) by Watson & Associates Economists Ltd., 2020.

3.6 Recent Land Absorption Trends in Employment Areas Across the Region of Peel

3.6.1 Employment Absorption Trends on Employment Lands in Peel Region, 2010 to 2019

Employment land absorption levels^[50] in Peel Region have averaged approximately 103 net ha (255 net acres) per year over the past decade, as summarized in Figure 3-16. Approximately 23% of employment land absorption in Peel Region has occurred within

^[50] Land area associated with new construction based on non-residential building activity permits issued throughout Employment Areas across Peel Region.



the Town of Caledon. Absorption within Caledon has been primarily concentrated in Goods Movement Sector, representing over two-thirds of the land absorbed.

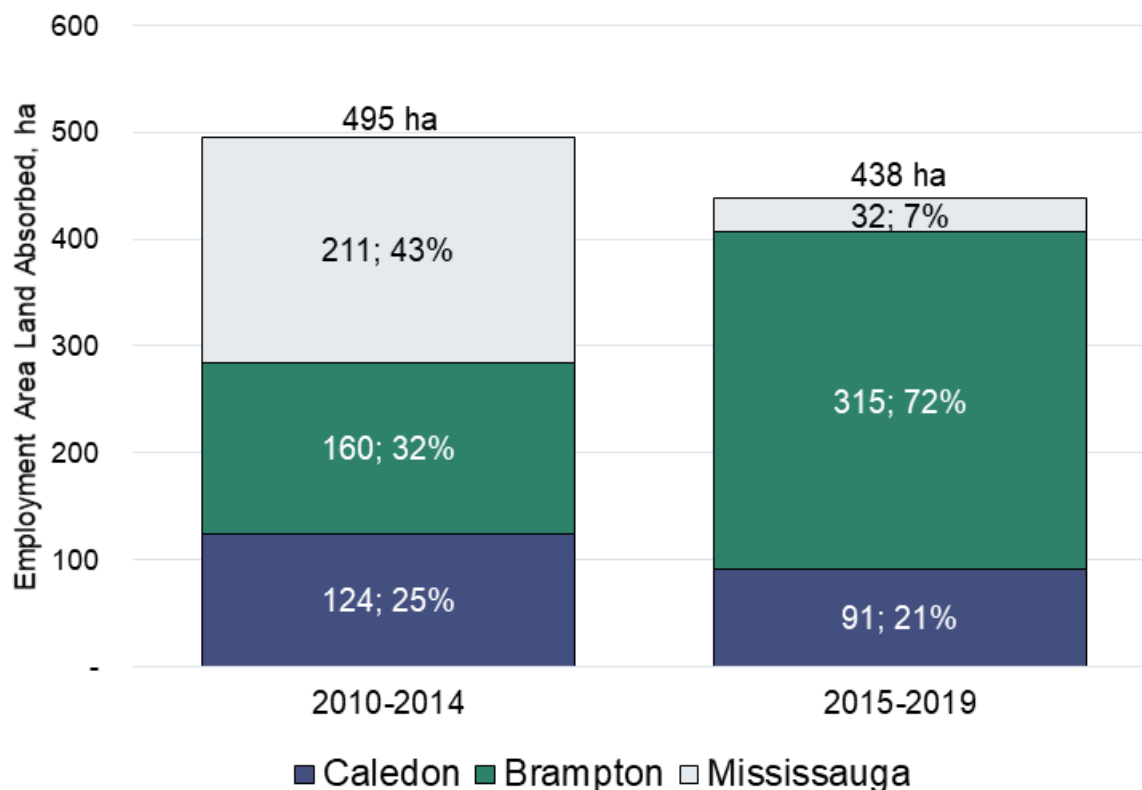
As summarized in Figure 3-16, Peel Region's absorption levels have decreased from an average of 495 ha (1,223 acres) over the 2010 to 2014 period, to 438 ha (1,082 acres) per year over the 2015 to 2019 period. It is important to note that 2013 year represented the year with the highest absorption in Caledon, representing the majority of Employment Area land absorption (80%) over the 2010 to 2013 period.

Given the diminishing supply of vacant employment lands, land absorption levels in the City of Mississauga have substantially declined from an average of 211 ha (521 acres) annually over the 2010 to 2014 to 32 ha (79 acres) annually. While absorption levels are low in the City of Mississauga, Mississauga has been successful in accommodating intensification and infill in Employment Areas. The City of Brampton has significantly increased its average annual land absorption from 160 ha (395 acres) annually to 315 ha (778 acres), largely due to the accommodating the extensive land requirements of the Goods Movement sector. It is important to recognize that the City of Brampton's employment land supply is rapidly diminishing, with only 850 gross ha (2,100 gross acres) of vacant employment lands remaining as May 2021 which represent 17% of the City's Designated Employment Area land supply.^[51]

^[51] Region of Peel, Peel2041+ Vacant and Underutilized Inventory, May 2021 Draft.
<https://pub-peelregion.escribemeetings.com/filestream.ashx?DocumentId=14734>



Figure 3-16
Region of Peel
Employment Area Lands Absorption
2010 to 2014 and 2015 to 2019



Source: Watson & Associates Economists Ltd.

3.7 Observations

Future employment growth within the Town of Caledon is strongly correlated with the growth outlook and competitiveness of the broader G.T.H.A. economy. Caledon offers the regional attributes that largely appeal to prospective international and local firms as well as new residents. The Goods Movement Sector has become a dominant sector in the Town of Caledon, representing a large uptake of Employment Area lands absorbed over the past few years. While recent growth has been concentrated in the Goods Movement Sector in Caledon, the Town has a diverse employment base to build upon in both the urban and rural areas as discussed further in Chapter 4. The Goods Movement Sector itself provides an opportunity to expand the depth of this sector, including opportunities for Major Office and institutional uses to support this growing sector.



Over the next several decades, the Town is anticipated to steadily grow across technology driven, export-based sectors as well as population serving employment sectors, as further discussed in the Report. In several cases, many of these sectors are also expected to experience strong growth prospects at the broader regional level, while other sectors, such as the Goods Movement Sector, are more anticipated to be concentrated within Peel Region.

On-going structural changes in the macro-economy and disruptive forces, which are being further accelerated by COVID-19, further complicate the Town's economic growth outlook. It is important for the Town to continue to navigate through these macro-economic factors to address how these trends are influencing local economic opportunities and challenges. At the local level, the Town has considerable control and ability to position itself in a positive manner. One key area where Caledon can positively influence the future competitiveness of its economic base relates to the structure and quality of its Employment Areas, commercial areas and Mixed-Use Areas. Further, supporting employment diversification in the Town's Rural Area will contribute toward the vitality of the rural and urban economy within the Town.



Chapter 4

Town of Caledon Employment Economic Structure and Employment Growth Forecast



4. Caledon Economic Structure and Employment Growth Forecast

This chapter provides a brief overview of Caledon's economic structure, identifying the Town's key employment sectors as well as local employment trends. Following this overview, a summary of the Town's long-term employment forecast to 2051 is provided. A sectoral analysis of the Town's long-term forecast is included to give further context to the Town's growth forecast. The chapter concludes with a summary of the key findings of stakeholder interviews which were held in 2021, to provide further perspectives regarding the opportunities and challenges facing Caledon in terms of economic development and competitiveness over the longer term.

4.1 Town of Caledon Economic Structure

The Town of Caledon's economic structure includes a diverse range of employment sectors which are located within the Town's urban and rural areas. Caledon's employment base as of 2021 is estimated at 32,000 jobs. Employment in Caledon is accommodated in three general employment categories: Employment Lands Employment (E.L.E.); Population-Related Employment (P.R.E.); and Rural-Based Employment (R.B.E.). Over the longer term, Caledon is also anticipated to accommodate Major Office Employment (M.O.E.). The current M.O.E. base is estimated at 200 jobs and includes employment in mid-rise office buildings in Bolton (e.g., Goodfellow Professional Building). Provided below is an overview of the Town's employment sectors and a forecast by employment sector to 2051. Appendix B provides further details on the Town's employment sectors.

4.1.1 *Employment Lands Employment Sectors*

Employment Lands Employment (E.L.E.) represents 57% of the Town's employment base. E.L.E. includes industrial-type uses typically accommodated in Employment Areas that are protected from sensitive uses, such as major retail and residential uses. E.L.E. includes the following sectors:

- Utilities, construction, administration and support, waste management and remediation services;



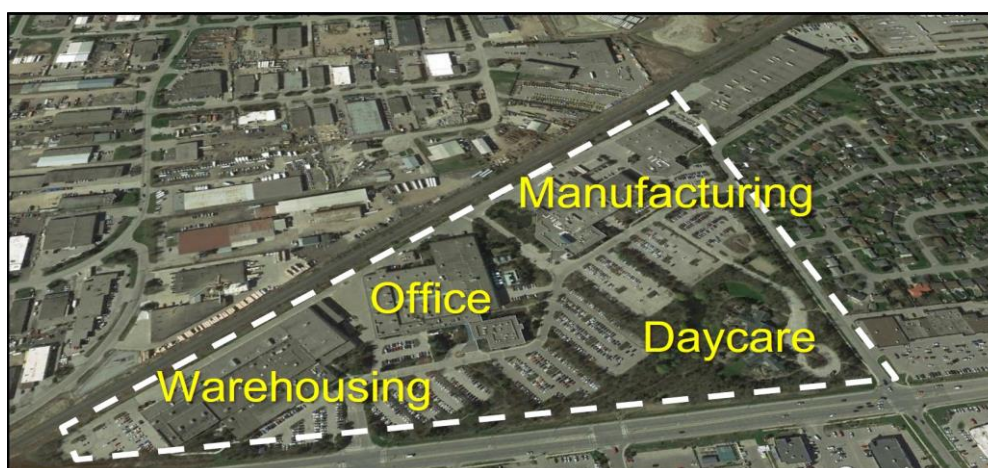
- Manufacturing; and
- Goods Movement.

4.1.1.1 *Manufacturing*

The largest manufacturing employers in Caledon include Husky Injection Molding Systems (machinery manufacturer), MARS Canada Inc. (food product manufacturer) and Sardo Foods (food product manufacturer). This sector is largely concentrated in the Town's Employment Areas. The Town's manufacturing base includes a high concentration of manufacturing sub-sectors that are also growing at a provincial level, including:

- Food manufacturing;
- Machinery manufacturing;
- Fabricated metal product manufacturing; and
- Plastics and rubber products manufacturing.

As previously discussed in Chapter 3, emerging export-based subsectors have site, space and built-form requirements that are significantly different from traditional manufacturing. This may include integrated operations combining office, research and development, warehousing and logistics, and on-site manufacturing in a “campus-style” setting (similar to Husky Injection Molding Systems in Bolton). Anticipating and responding to the evolving needs of industry is necessary for the Town to better position itself for sustained growth.



Husky Injection Molding Systems Campus, 500 Queen St. S., Bolton – Integrated operations in Bolton. Site is on the edge of the Employment Area which offers a good transition to the Community Area and Employment Area.



4.1.1.2 Utilities, Construction and Administration Support and Waste Management

This employment sector includes a wide range of employment uses that facilitate the servicing, construction and maintenance of residential and non-residential properties. This employment sector is Caledon's largest employment sector and represents a large share of the Town's no fixed place of work (N.F.P.O.W.) employment. The following are sub-sectors within the construction sector that have a high employment concentration in Caledon compared to the Province:

- Construction of buildings;
- Heavy and civil engineering construction; and
- Specialty trade contractors.

While the sector typically operates out of low-order employment sites, there is an opportunity to further develop this sector with higher-order employment uses, such as Major Office to support this sector.

4.1.1.3 Goods Movement

Within this sector, the Truck Transportation sub-sector represents a third of the total existing employment base. The Goods Movement sector in Caledon is starting to diversify with growth in a range of wholesale trade sub-sectors, as well as new developments that integrate logistics and corporate office functions. For example, The Beer Store recently built a new distribution centre and corporate office in Bolton (12258 Coleraine Drive). This development resulted in the relocation of its office staff from an office building in the City of Mississauga (5900 Explorer Drive) to its new Bolton location.

It is important to recognize that the Goods Movement sector also supports the function of other businesses. The opening of the UPS courier depot in Mayfield West, a large G.T.H.A. facility, is an important global integrator that provides businesses such as manufacturers and contractors with a global distribution network.

As previously discussed in Chapter 3, there continues to be growing demand to accommodate the Goods Movement sector throughout the G.T.H.A., and more broadly across southern Ontario. With over 145,000 jobs directly associated with this sector, Peel Region has the largest and most concentrated Goods Movement cluster in the



G.T.H.A. As such, this sector is a major contributor to the Region's employment base, economic output and tax assessment base.

As the Region's supply of vacant greenfield employment lands continues to diminish in the City of Brampton, a greater share of employment is anticipated for the Town of Caledon (just over one-third of the total Peel Region Goods Movement employment growth forecast).

As noted in the Town of Caledon Economic Development Strategy (February 2020) prepared by MDB Insights, given the nature of this sector (low employment density and high traffic volumes associated with the development), this sector should be effectively managed in Caledon, rather than actively targeted.^[52] Efforts should be focused on expanding the breadth of this sector to include a range of employment opportunities (e.g., office support uses) and ensuring that the sector does not undermine the efforts to attract a broad range of employment opportunities in Caledon. The Goods Movement sector may provide opportunities for higher order employment activities in Caledon, including stand-alone corporate offices.

The following Goods Movement sub-sectors each have a high employment concentration in Caledon compared to the Province:

- Building material and supplies merchant wholesalers;
- Machinery, equipment and supplies merchant wholesalers;
- Truck transportation;
- Support activities for transportation; and
- Warehousing and storage.



Mayfield West, 12424 Dixie Rd. - UPS Depot.



Mississauga, 2727 Meadowpine Blvd. – Purolator Head Office, higher-order Goods Movement development.



Bolton, 12258 Coleraine Dr. – The Beer Store Corporate Office and Distribution Centre.

^[52] An Economic Strategy for the Town of Caledon, 2020-2030, prepared by MDB Insights, February 2020, p. 19.



4.1.2 Population-Related Employment Sectors

Population-Related Employment (P.R.E.), including work at home employment, represents 25% of the Town's employment and includes a range of employment sectors that primarily support the local and regional population base. These uses are primarily accommodated in the Urban Community Area and Rural Area, and to a lesser extent, in Employment Areas. The following are P.R.E. sectors:

- Personal services, retail and tourism;
- Health care, public administration and educational services; and
- Office sectors.

The Town of Caledon has approximately 1 P.R.E. job per 10 residents which is considered high and suggests that the Town has a small P.R.E. base relative to its population base. Caledon P.R.E. is primarily oriented towards serving the local population base and residents are dependent on travelling to surrounding municipalities for higher order P.R.E. uses, including health care (hospitals and health care specialists), post-secondary institutions, government services (provincial and federal agencies) and a wider range of regional serving retail uses (shopping centres).

P.R.E. is accommodated in the Urban and Rural Areas. The Rural Area accommodates P.R.E. largely through the growing tourism sector. Given the significant Urban Area population growth anticipated for the Town of Caledon, the Town will need to plan for a greater amount and range of P.R.E. uses.



Bolton, 18 King St E., Royal Courtyards. Caledon's largest concentration of small offices.



Alton Village, Alton Mills, a heritage building supporting the growing arts and creative economy in Caledon.



Bolton, Highway 50, Retail Big-Box uses. Caledon's largest cluster of large retail uses.



4.1.3 R.B.E. Sectors

R.B.E. sectors represent approximately 17% of the Town's employment base and include the following sub-sectors:

- Agriculture; and
- Resources (e.g., aggregates).

The rural-based sectors each play an important role in supporting the Town of Caledon's economy, cultural heritage, and environmental stewardship. Further, rural-based sectors provide economic opportunities in the Greenbelt Area. Approximately 46% of the Town's land base is currently used for farming.^[53] The agriculture base in Caledon is comprised of major crops such as soybeans, hay and mixed grains, as well as agriculture activities that include dairy, beef cattle and horse/equine production. Over time, Caledon's agricultural landscape has shifted away from livestock-based sectors, such as dairy, beef and hog farming, and towards crops including grains and oilseeds, hay, and field vegetables.^[54]

4.2 Employment Growth Trends by Employment Sector

As previously discussed in Chapter 3, the Town of Caledon is a part of a Region with a robust economy and diverse mix of export-based employment sectors. Situated at the northwestern edge of the G.T.H.A. with good connectivity to transportation networks, the Town of Caledon continues to benefit from its strategic location within the G.T.H.A. Over the past two decades (2001 to 2021), the population of Caledon grew by 2.1% annually (net increase of 26,800 persons). It is encouraging to note that the annual employment growth rate in Caledon was 2.7% annually (net increase of 13,300 jobs), growing at a faster pace than its population base over the same period. As a comparison, the employment base in the Region of Peel grew at an annual rate of 1.6% annually over the 2001 to 2021 period.

Figure 4-1 provides a summary of employment growth by employment sectors over the 2001 to 2021 period in Caledon. Key highlights include:

^[53] Town of Caledon, Agriculture Trends Study prepared by Wilton Consulting Group, February 22, 2021.

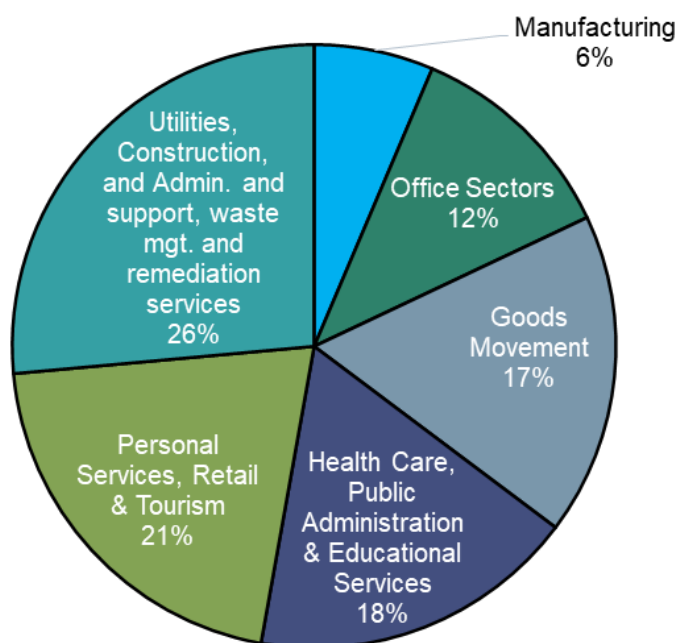
^[54] Ibid., p. 21.



- A large share of employment growth was concentrated in utilities, construction and administration, support and waste management at 26% of the Town's employment growth, followed by personal services, retail and tourism at 21%;
- Health care, public administration and educational services accounted for 18% of the Town's employment growth, largely comprised of growth in health care employment;
- Goods Movement employment increased by 2,300 jobs over the past 20 years; most of the employment growth (80%) was concentrated in the last 10 years (2011 to 2021);
- Office sector employment represented 12% of the Town's employment growth, largely led by growth in professional, scientific, and technical services primarily housed in small offices; and
- The manufacturing sector represented a small share (6%) of the Town's employment growth; however, it is important to recognize that the manufacturing sector in Ontario experienced a decline in employment during the 2008/2009 economic downturn. As a comparison, manufacturing employment decreased by 16,800 jobs over the 2001 to 2021 period within the rest of Peel Region (City of Mississauga and City of Brampton).



Figure 4-1
Town of Caledon
Employment Growth by Sector,
2001 to 2021



Source: Watson & Associates Economists Ltd. derived from Statistics Canada 2001 and 2016 data; Town of Caledon Employment Survey, 2018; and Region of Peel M.C.R. 2051 Forecasts.

4.3 Town-Wide Employment Forecast to 2051

Figure 4-2 summarizes the long-term employment forecast for the Town of Caledon based on the Region of Peel M.C.R. 2051 forecast and allocation for the Town of Caledon (dated September 2021). Caledon is anticipated to accommodate 28% of the Region of Peel's employment growth over the next 30 years. Figure 4-2 includes the total employment and the employment activity rate in comparison to recent historical trends. Key observations are provided below:

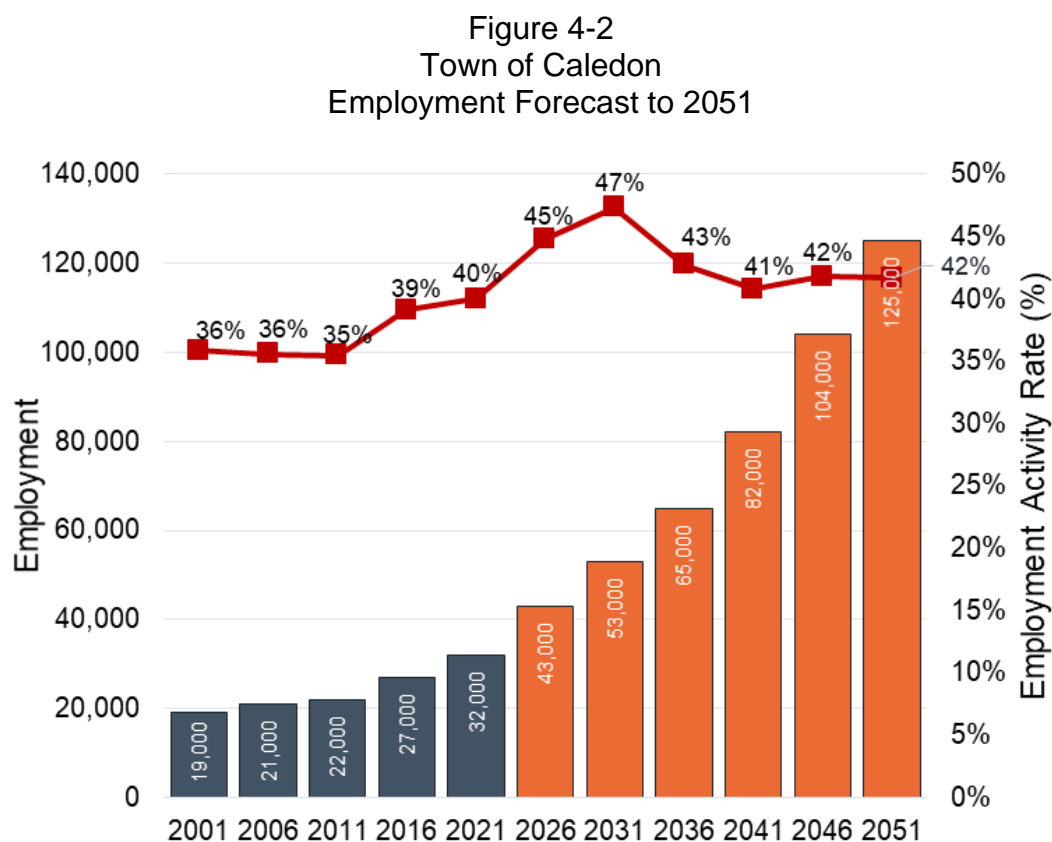
- By 2051, the Town's employment base is forecast to reach approximately 125,000. This represents an increase of approximately 94,000 jobs from 2021, or an annual employment growth rate of 4.7%.



- Since 2011, the Town of Caledon's employment activity rate (ratio of local employees to population) has increased from 35% to 40% which indicates that the Town's employment base is growing at a faster rate than the population base.
- By 2031, the Town's employment activity rate is forecast to increase to 47%. During the post-2031 period, the Town's employment activity rate is forecast to gradually decrease to 42% largely due to the aging of the population and labour force base.

4.3.1 Employment Growth by Employment Sector to 2051

Figure 4-3 provides a summary of the Town's historical employment growth by employment sector (2001 to 2021) compared to the anticipated forecast by employment sector over the 2021 to 2051 period. The sectoral forecast builds on the Region of Peel's employment forecast by land-use category.



Source: Based on Region of Peel M.C.R. 2051 forecasts, summarized by Watson & Associates Economists Ltd.



4.3.1.1 *Employment Lands Employment Sectors*

Strong growth is anticipated in employment sectors that typically comprise Employment Lands Employment-type uses (utilities, construction, administration and support, waste management and remediation services; manufacturing; and Goods Movement).

- Building upon the Town's existing manufacturing clusters (e.g., food manufacturing; machinery, manufacturing; fabricated metal product manufacturing; and plastics and rubber products manufacturing), as well as other emerging advanced manufacturing sectors, the manufacturing sector is forecast to increase by 15,600 jobs (520 jobs annually).
- Collectively, industrial employment sectors which fall under utilities, construction, administration and support, waste management and remediation services are anticipated to add 19,600 jobs (650 jobs annually).
- Goods Movement is anticipated to add 16,200 jobs (540 jobs annually). Additional jobs within this sector are largely anticipated to be accommodated in new logistics, warehousing and transportation facilities. Employment growth opportunities within this sector also exist related to Major Office Employment (e.g., office of a logistics company).

4.3.1.2 *Population-Related Employment Sectors*

Caledon's population is anticipated to increase at an annual growth rate of 4.5%. In order to accommodate a robust rate of population growth, the Town will require a significant increase in employment accommodated in retail and institutional-type buildings, referred to as Population-Related Employment (P.R.E.).

- The personal services, retail and tourism sector is forecast to provide 19,600 jobs over the forecast and primarily consists of employment in retail-type buildings. As previously discussed, it is anticipated that growth will be more oriented towards smaller format retail; however, there will be a need to accommodate retail uses that require larger sites.
- Collectively, health care, public administration and educational services sectors are forecast to provide 11,600 jobs over the forecast. These sectors will be fueled by the aging of the existing population as well as growth in new residents that are attracted to the Town. A range of building types support these sectors,



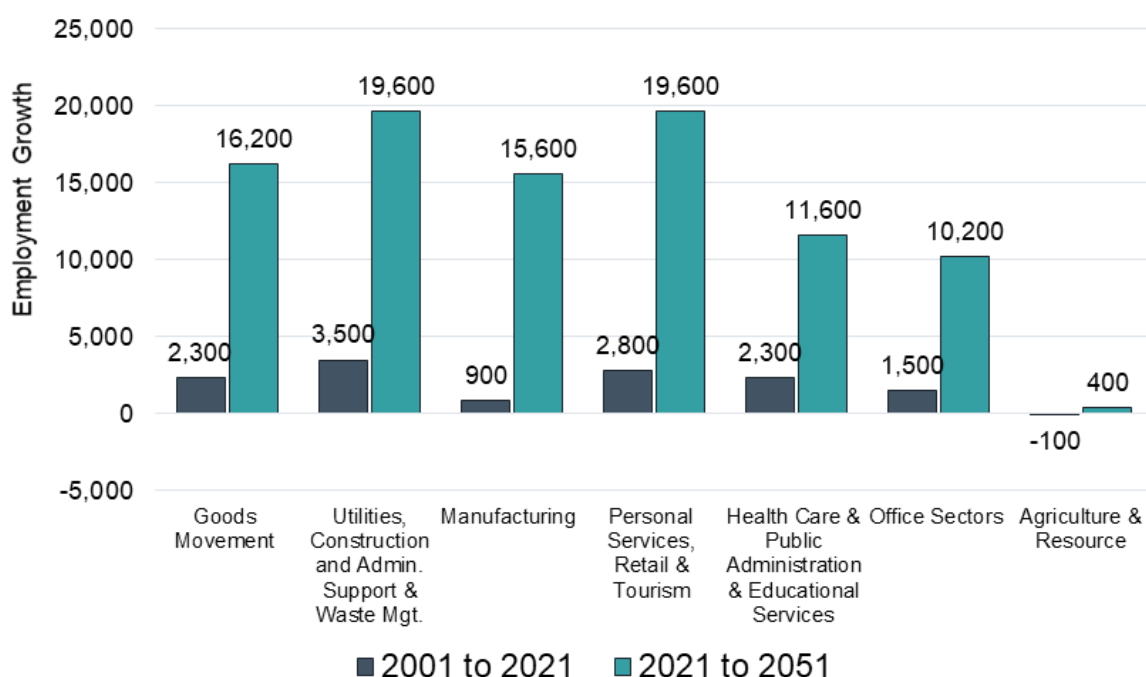
including the need for large institutional uses (e.g., schools, large health care facilities and nursing homes).

- Office sectors are core employment components of Major Office Employment; however, office sectors are also accommodated in retail and small-scale office buildings and multi-tenant buildings in Employment Areas. It is anticipated that the Town will accommodate 10,200 office sector jobs over the forecast horizon.

4.3.1.3 R.B.E. Sectors

The Town is anticipated to accommodate 400 R.B.E. jobs in agriculture and resources over the next 30 years. Over the forecast it is anticipated that the agriculture sector will continue to diversify. Further discussion of R.B.E.-sector opportunities is provided in Chapter 8.

Figure 4-3
Town of Caledon
Employment Forecast by Sector,
2001 to 2021 and 2021 to 2051



Source: Watson & Associates Economists Ltd. derived from Statistics Canada 2001 and 2016 data; Town of Caledon Employment Survey, 2018; and Region of Peel M.C.R. 2051 Forecasts.



4.3.2 Employment Growth Forecast by Employment Category

Building on the Region of Peel M.C.R. 2051 forecast for the Town of Caledon, Figure 4-3 summarizes the annual long-term employment forecast from 2021 to 2051 by employment land-use category, including Employment Lands Employment, Population-Related Employment (including work at home), Major Office Employment, and Rural Based Employment. As previously discussed, these categories are organized by a general built-form for planning purposes. For example, while the Goods Movement is generally an industrial-type employment use, referred to as Employment Lands Employment, this sector can also be accommodated in Major Office Employment. Key highlights are included below.

4.3.2.1 Employment Lands Employment (E.L.E.)

E.L.E. is anticipated to comprise 38% of the employment, representing 47,800 additional employees annually over the next 30 years. On an annual basis, E.L.E. is anticipated to add 1,600 employees, representing an annual growth rate of 4.4%. The majority of E.L.E. growth is anticipated to be accommodated in Employment Areas and will have a significant impact on the Town's employment land absorption levels, as discussed later in Chapter 5.

4.3.2.2 Population-Related Employment

Population-Related Employment (P.R.E.) is anticipated to comprise 30% of the Town's employment growth, representing 28,300 additional employees over the next 30 years. An additional 8,000 work at home jobs are anticipated over the horizon, increasing the share of P.R.E. growth for the Town to 39%. Work at home employment is anticipated to be driven by the rise in opportunity for remote work, as well as opportunities for employment in the Rural Area. The rest of P.R.E. is anticipated to be driven by population growth and to a lesser extent, commercial uses related to the tourism sector, as well as multi-tenant office and institutional uses.

Over the forecast period, the P.R.E. ratio, the number of residents per 1 P.R.E. job, is anticipated to decrease from 10 residents per 1 P.R.E. job in 2021 to 7 residents per 1 P.R.E. by 2051. As previously discussed, the Town has a small P.R.E. base relative to its population base. The anticipated amount of P.R.E. growth supports planning policies regarding complete communities by providing residents with a broader range of commercial and institutional uses locally. The Community Area Settlement Area



Boundary Expansion (new communities) are collectively anticipated to provide a P.R.E. ratio of 9 residents per 1 P.R.E. job. This higher P.R.E. ratio reflects that less jobs will be allocated to new communities relative to population growth (i.e., more growth directed to existing commercial, institutional and mixed-use areas). As a comparison, the P.R.E. ratio in the City of Brampton is currently 7 residents per 1 P.R.E. job as of 2021.

4.3.2.3 Major Office Employment

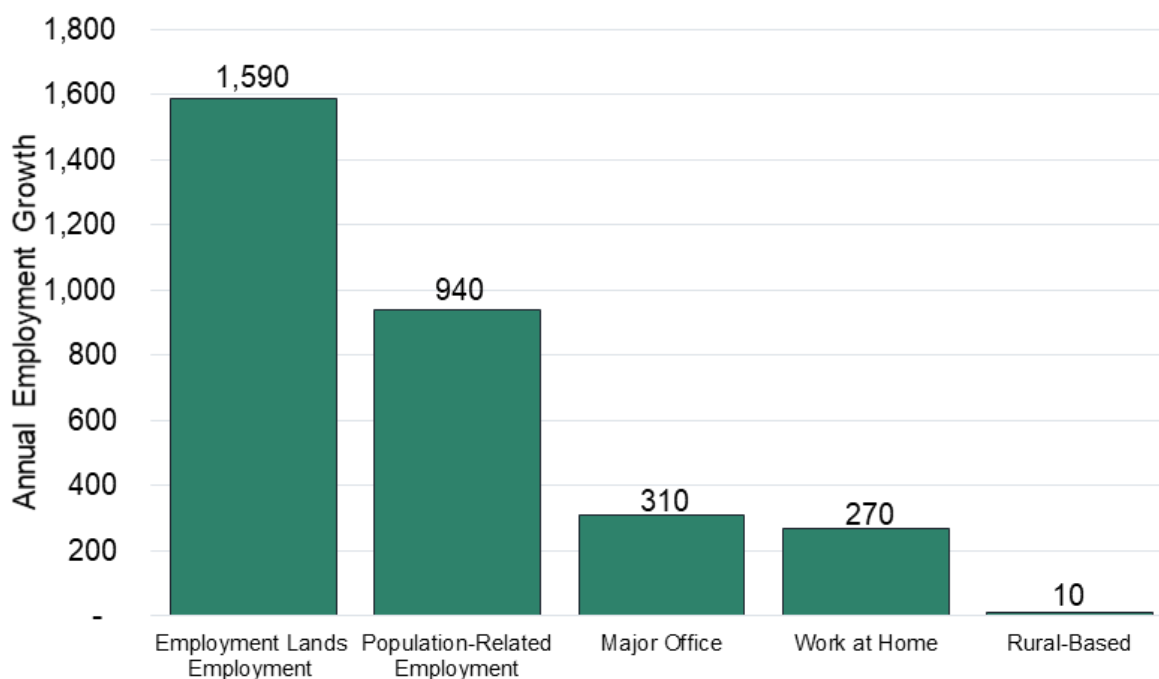
As previously discussed, Major Office Employment (M.O.E.) includes employment in office buildings 2,000 sq.m (22,000 sq.ft.) in size. Over the forecast period, the Town is anticipated to add 9,200 M.O.E. employees, or 310 employees annually. To achieve this level of M.O.E. will require that the Town actively plan and target office employment. Several municipalities across the G.T.H.A. have been actively preparing strategies and studies to attract M.O.E.

4.3.2.4 Rural-Based Employment

Rural-Based Employment (R.B.E.) is anticipated to remain stable despite an anticipated decline of the land base within the Rural System to accommodate urban growth expansion. R.B.E. includes employment related to agriculture, resources and other uses requiring a rural setting.



Figure 4-4
Town of Caledon
Annual Employment Forecast by
Employment Category



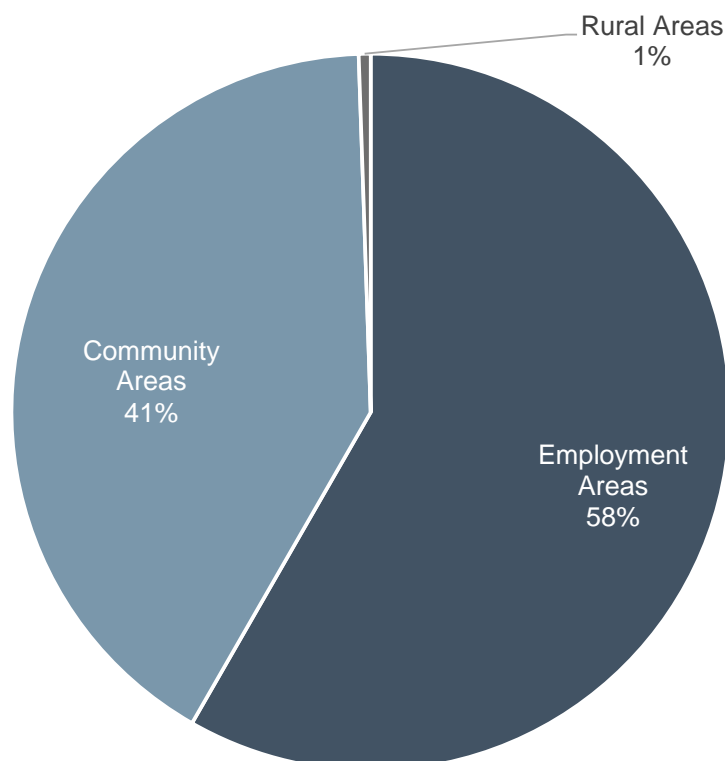
Source: Based on Region of Peel M.C.R. 2051 forecasts, summarized by Watson & Associates Economists Ltd.

4.4 Employment Growth Forecast by Area

Figure 4-5 provides a summary of employment growth by policy area over the 2021 to 2051 period. As summarized, approximately 58% of the Town's employment growth is allocated to Employment Areas while 41% is allocated to Community Areas. The Rural Area is anticipated to accommodate 1% of the Town's employment growth.



Figure 4-5
Town of Caledon
Employment Growth Forecast by Area
2021 to 2051



Source: Based on Region of Peel M.C.R. 2051 forecasts, summarized by Watson & Associates Economists Ltd.

4.5 Stakeholder Perspectives on Employment Opportunities in Caledon

Interviews with a diverse cross-section of stakeholders representing interests across a range of employment sectors were undertaken during the fall of 2021 to better understand the current state of the Town's employment base and future economic opportunities.^[55] A summary of these interviews has been organized in a S.W.O.C.

^[55] Seven stakeholders were interviewed by Watson & Associates Economists Ltd. with an approximately 1-hour discussion, in October. Individuals included real estate



(Strengths, Weaknesses, Opportunities and Challenges) analysis and is provided below.

Employment Areas

Strengths and Opportunities:

- The Town is situated on the northern edge of the G.T.H.A. market with accessibility to major highways, two intermodal facilities and the Toronto Pearson International Airport. Its strategic location has been an important element in the Town's growth and success.
- The rapidly depleting supply of greenfield lands within the City of Mississauga and the City of Brampton makes Caledon an attractive option.
- The Town and the broader Peel Region have existing industrial businesses upon which to build. Existing businesses looking to expand generally prefer expansion options close to their existing operations. Within Peel Region, the City of Mississauga, has a large industrial base in mature Employment Areas, but has relatively limited opportunities for expansion of land-extensive industrial uses.
- The proposed G.T.A. West highway through Caledon will improve access to the Town's existing and planned Employment Areas, also improving access for the labour force.

Goods Movement Sector

Strengths and Opportunities:

- The Goods Movement sector is becoming more complex in the G.T.H.A.
 - Peel Region represents a hub for the Goods Movement sector in the G.T.H.A. due to its proximity to key points of entry (e.g., intermodal facilities, Toronto Pearson International Airport and highways). There is an increasing need for office employment in Peel Region to coordinate the movement of goods. This may involve an opportunity for more office space in existing distribution centres and/or the development of integrated facilities with office and warehousing functions.

representatives in the office and industrial sectors; agriculture business owner; and staff from the Town's Corporate Partnerships and Events department.



- The next building wave of logistics development in Caledon is to support the “middle mile” logistics which involves the movement of goods from regional distribution centres to last mile fulfillment centres. These facilities tend to include third-party logistics facilities with a building size of between 75,000 sq.ft. and 200,000 sq.ft.

Manufacturing

Strengths and Opportunities:

- There is significant demand to accommodate the food and beverage industry (such as food processing) in the G.T.H.A. Caledon provides the general locational requirements for this industry.
- There is a demand to accommodate the cannabis industry in southern Ontario and Caledon provides access to a large labour pool, availability of agriculture land and the infrastructure to support the industry (including Employment Areas, Goods Movement businesses and transportation infrastructure).

Weaknesses and Challenges:

- The Goods Movement sector is willing to pay more for employment land sites in Caledon and is driving up prices for land and supporting speculative purchases.

Knowledge-Based Sector

Strengths and Opportunities:

- GO Transit service provides an amenity to residents, as well as businesses operating in Caledon.
- Transit improvements in Peel Region, including the Hurontario LRT (currently underway) will better integrate the Region with alternative transit options for the labour force, as well as provide better connections to post-secondary institutions.
- Opportunity exists to accommodate the life sciences sector in the G.T.H.A. in small and medium flex-industrial space that cannot be accommodated in dense urban environments, such as downtown Toronto. This includes laboratory research and testing facilities.
- The office concept of “hub and spoke” may gain traction in the G.T.H.A. for large companies and have relevance for urban centres on the edge of the G.T.H.A.,



such as Caledon. The “hub and spoke” office model is based on a smaller central office in a large urban centre and satellite offices in surrounding urban centres that provide alternative work locations for employees.

Weaknesses and Challenges:

- The Town does not have a post-secondary institution or hospital to anchor the knowledge-based sector.
- Currently there is no established office node in the Town to attract office (downtown Bolton is a heritage district).

Rural Area

Strengths and Opportunities:

- Caledon’s large rural base provides opportunities to accommodate research and development related to the agricultural sector. Wellington County was provided as an example of a market with an active agriculture research and development sector (e.g., Ontario Nutrilab Inc. near Fergus which conducts animal testing research for the pet food industry; Alma Aquaculture Research Station; and Elora Research Farms to name a few).
- Caledon’s recreational amenities provide an immense opportunity to expand the tourism sector. Key anchors include the TPG at Toronto Osprey Valley and Caledon Equestrian Park.
- Alton Village has become a centre for creative class industries. The success of this Village could be applied to the Town’s other Villages.
- The Town needs to explore options for dealing with decommissioned aggregate pits in the Town. These sites may provide revitalization opportunities that may support other uses.
- Opportunity exists for the Town to provide more planning direction on uses permitted in the Greenbelt Area and identify opportunities that facilitate growth in tourism.

Weaknesses and Challenges:

- The Greenbelt Area limits opportunities for development in areas that could facilitate growth in tourism.



Chapter 5

Urban Employment Area Opportunities



5. Employment Area Opportunities

This chapter provides a detailed discussion regarding opportunities for existing and future Employment Areas in the Town of Caledon by geographic area. A long-term vision has also been provided based on a review of the local physical, infrastructure and real estate market attributes as well as long-term planning and economic development policy objectives for each of these Employment Areas.

5.1 What are Employment Areas?

Employment Areas (also known as industrial areas) typically include a broad range of designated lands, including light, medium and heavy industrial lands, business parks and rural industrial lands. Employment Areas accommodate primarily export-based employment, including a wide range of industrial uses (e.g., manufacturing, distribution/logistics, transportation services), as well as specific commercial and institutional uses (e.g., office, service, ancillary/accessory retail) which generally support the industrial/business function of the Town's Employment Areas.

Employment Areas form a vital component of Caledon's land-use structure and are an integral part of the local economic development potential of the economic region. They are also home to many of the Town's largest private-sector employers. Through the development of its industrial land base, the Town is better positioned to build more balanced, complete, and competitive communities. Development typically accommodated on employment lands generates relatively strong economic multipliers (i.e., spin-off effects) that benefit the Town of Caledon directly and indirectly. In addition, employment lands development typically generates high-quality employment opportunities which can improve local socio-economic conditions (i.e., live/work opportunities). Furthermore, achieving non-residential growth adds to a community's assessment base, which can help support competitive property taxes and stronger municipal service levels. Industrial land development also tends to produce more positive net fiscal benefits for the community than other types of development (e.g., residential and retail). Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the Town of Caledon and the surrounding economic region.



5.2 Existing Caledon Employment Area O.P. Policy Framework

5.2.1 *Employment Area Definition*

The Town of Caledon O.P. defines Employment Areas as “lands designated for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices and associated retail and ancillary facilities.”^[56] The Town’s definition is similar to the Employment Area definition in the P.P.S., 2020 which has remained unchanged since the previous P.P.S. According to the O.P., Employment Area growth will be primarily focused to the Rural Service Centres of Bolton and Mayfield West and the Industrial/Commercial Centre of Tullamore. The Victoria Industrial Area and Sandhill Industrial Area are identified as additional opportunities that are appropriate for the level of services available.^[57]

5.2.2 *Employment Area Land Utilization*

5.2.2.1 *Employment Area Density*

The Town’s O.P. currently does not have a target Employment Area density. It is noted in the O.P. that the Town is required to achieve the Region of Peel D.G.A. density target of 50 people and jobs per hectare for all D.G.A. lands, including Employment Areas. The Town’s D.G.A. density target is based on a previous Growth Plan where Employment Areas were included in the D.G.A. density target.^[58]

5.2.2.2 *Intensification in Employment Areas*

The Town’s O.P. currently does not contain policies on encouraging intensification in Employment Areas, such as development on utilization lands or through infill development.

5.2.2.3 *Employment Area Land Conversions*

The Town’s O.P. provides a conversion framework based on the P.P.S., 2020, which is set out in section 5.5.3.12 of the Town of Caledon O.P.^[59] The Town requires updates

^[56] Town of Caledon Official Plan (2018), p. 6-35.

^[57] Ibid., policy 5.5.3.1, p. 5-47.

^[58] Ibid., policy 5.5.3.5, p. 5-47.

^[59] Town of Caledon Official Plan (2018), policy 5.5.3.12, p. 5-48.



to its Employment Area land conversion policies. The Town's O.P. should also recognize Provincially Significant Employment Zones (P.S.E.Z.), which includes most of the Bolton Employment Area.

5.2.3 *Employment Area Designations*

The Town has three main designations for Employment Areas as identified in the Town's O.P.:

- Prestige Industrial;
- General Industrial; and
- Dry Industrial.

In addition, the Town has a series of Secondary Plans for Employment Areas that direct development on Employment Area lands, including phases in the Bolton Employment Area and new Employment Areas in Mayfield West and Tullamore. Provided below is a summary of the Town of Caledon's current O.P. Employment Area designations.

5.2.3.1 *Prestige Industrial*

The Prestige Industrial designation requires development on lands with full municipal water and sewer services geared to clean industry as well as office uses on landscaped lots in a park-like setting.^[60] Employment lands with a prominent visual exposure and lands adjacent to major roads and highway routes are encouraged to be developed for prestige industrial uses.^[61] It is further noted that Employment Areas that abut the City of Brampton or Mayfield Road shall be developed as Prestige Industrial with buffering, berming, landscaping and site design.^[62]

Permitted uses in the Prestige Industrial designation include a range of uses such as manufacturing, light industrial, warehousing and wholesale operations, offices and day care facilities. Complementary retail uses such as recreational and utilities facilities are permitted if they do not distract from the function of the Employment Area. Business Parks and Office Parks are encouraged to be located within the Prestige Industrial designation. Automotive uses are not permitted within the Prestige Industrial

^[60] Ibid., 5.5.3.21, p. 5-49.

^[61] Ibid., 5.5.3.16, p. 5-49.

^[62] Town of Caledon Official Plan (2018), policy 5.5.3.17, p. 5-49.



designation.^[63] The Town's Tullamore Secondary Plan does not permit cold storage uses and trucking terminals within the Prestige Industrial designation.^[64]

5.2.3.2 General Industrial

The General Industrial designation requires development on lands with full municipal water and sewer services where the “predominant use” of the land includes a range of industrial uses, such as manufacturing, warehousing and wholesale operations, light industrial uses (e.g., research and development, laboratories and computer/data processing), transportation terminals, contractor's yards, ancillary office uses, accessory outdoor storage and specific automotive uses. Complementary uses such as recreation facilities and public uses and utilities that do not distract from the function of the Employment Area are permitted.^[65]

5.2.3.3 Dry Industrial

The Dry Industrial designation accommodates industrial-type uses on lands with private sanitary sewage and water services, or partial regional piped services. Permitted uses are those that do not require large amounts of water, such as warehousing and wholesale operations; transportation terminals; contractor's yard; open storage; automotive uses, excluding motor vehicle sales, rental or leasing agencies. Manufacturing is a permitted use on dry industrial uses.^[66]

5.2.4 Commercial and Employment-Supportive Uses in Employment Areas

According to the Town's O.P., commercial uses are permitted in Employment Areas provided that:

- The commercial use is accessory to an employment use;
- The commercial use only serves the industrial area, such as a bank or restaurant; or

^[63] Ibid., policy 5.5.4.1, p. 5-50.

^[64] Ibid., Tullamore Secondary Plan, policy 5.5.4.1, p. 7-117.

^[65] Ibid., policy 5.5.5.1, p. 5-51.

^[66] Ibid., policy 5.5.6, p. 5-52.



- The commercial use is not a major retail use.^[67]

The O.P. requires that commercial uses in the Employment Area are to be direct to an internal location in an Employment Area and not adjacent to a provincial highway or arterial road.^[68] This is contrary to common practices in planning for Employment Areas. Generally, directing commercial uses in an Employment Area on the periphery or at a gateway location with access to a major arterial is a common practice in planning Employment Areas.

The Tullamore Secondary Plan provides additional provisions for commercial uses, including permitting commercial uses at a gateway location to the Employment Area. Commercial uses are permitted at the gateway area to the Employment Area which is situated at the intersection of Airport Road and Mayfield Road. According to the Tullamore Secondary Plan:

“...recognizing the transitional nature of the Tullamore Industrial/Commercial Centre at the gateway to Caledon, a wider range of retail and service commercial uses may be permitted to accommodate contemporary retail formats to adequately service the area.”^[69]

5.3 Profile of Employment Areas in the Town of Caledon

5.3.1 *Employment Area Overview*

5.3.1.1 *Existing Designated Employment Areas*

It is estimated that the Town's Employment Areas accommodate 17,500 employees, representing 55% of the Town's employment base as of 2021. The Town of Caledon has five existing designated Employment Areas as listed below.

Rural Service Centre Employment Areas (full-serviced Employment Areas)

- Bolton Employment Area, including the following extensions:
 - Coleraine West Employment Area Secondary Plan
 - South Simpson Industrial Area Secondary Plan

^[67] Ibid., 7.15.7.1.4, p. 7-257.

^[68] Ibid., 5.5.3.10, p. 5-48.

^[69] Ibid., Tullamore Secondary Plan, 7.8.2, p. 7-115.



- Mayfield West Employment Area, including the following Strategic Employment Node:
 - Hurontario Employment Area (West of Hurontario Street and Highway 410)

Industrial/Commercial Centres Employment Areas (currently partially serviced, but planned for full services)

- Tullamore Industrial Area
- Victoria Industrial Area

Industrial/Commercial Centres (currently unserviced and no services prior to 2051)

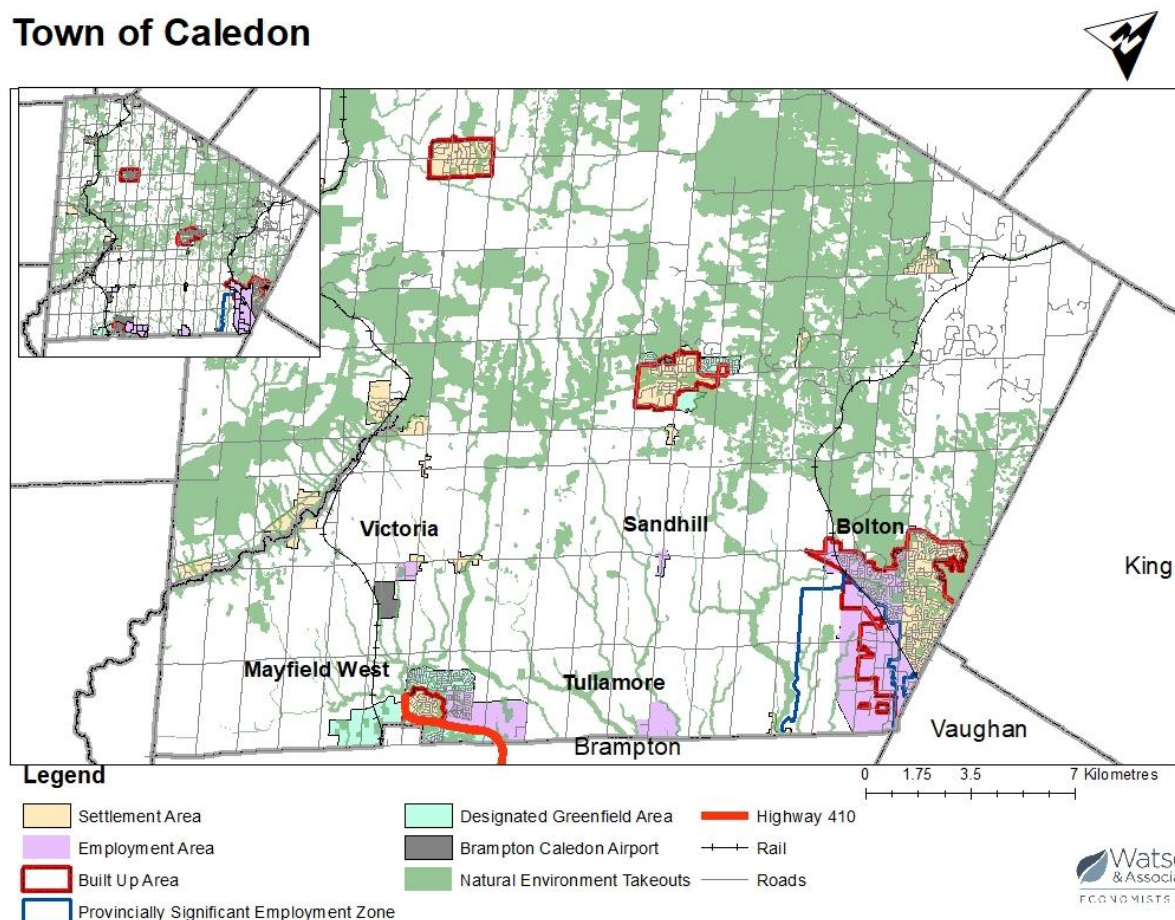
- Sandhill Industrial Area

Figure 5-1 geographically illustrates the location of the Town's Employment Areas. To provide context of the total Employment Area land supply, the Sandhill Industrial Area is provided in this section of the report. Employment opportunities within Sandhill are provided in Chapter 7 as part of the discussion on Rural Employment Area opportunities.



Figure 5-1
Town of Caledon
Map of Existing Designated Employment Areas in Caledon

Town of Caledon



5.3.1.2 Strategic Employment Areas

The Town has two Employment Areas in Mayfield West that have targeted employment growth:

- **Hurontario Employment Area** is a strategic node of approximately 15 ha (37 acres) adjacent to and west of Hurontario Street and Highway 410. As an entrance to the Town of Caledon and as a gateway to Mayfield West, this area is planned as a high-quality business/office park in accordance with O.P. policies and the applicable design guidelines.^[70] The site is in proximity to the proposed

^[70] Town of Caledon Official Plan (2018), 7.14.13, p. 7-241.



Mayfield West Transit Hub M.T.S.A. In addition, the O.P. has set an employment target of 1,160 jobs for the Hurontario Employment Area which is approximately 77 jobs/ha.^[71]

- **Academic/Research Campus** is a site designated in the Town's O.P. to accommodate a post-secondary education institution such as a community college or university (i.e., Major Institutional use). The site is approximately 21 ha. Research and development facilities, laboratories and corporate offices that are accessory to research and development facilities are also permitted.^[72]

The designation is reviewed every five years to assess the prospect of a post-secondary education institution. If the Town concludes that there is no prospect of a post-secondary education institution and a feasibility study demonstrates to Council's satisfaction that there is little prospect of a post-secondary education institution locating in the Academic/Research Campus designation, then the lands in this designation may be developed in accordance with the Prestige Industrial designation without amendment to the Town's O.P.^[73] It is noted that these lands are included within the Town's Community Area land supply.

Figure 5-2 provides a map of these strategic Employment Areas.

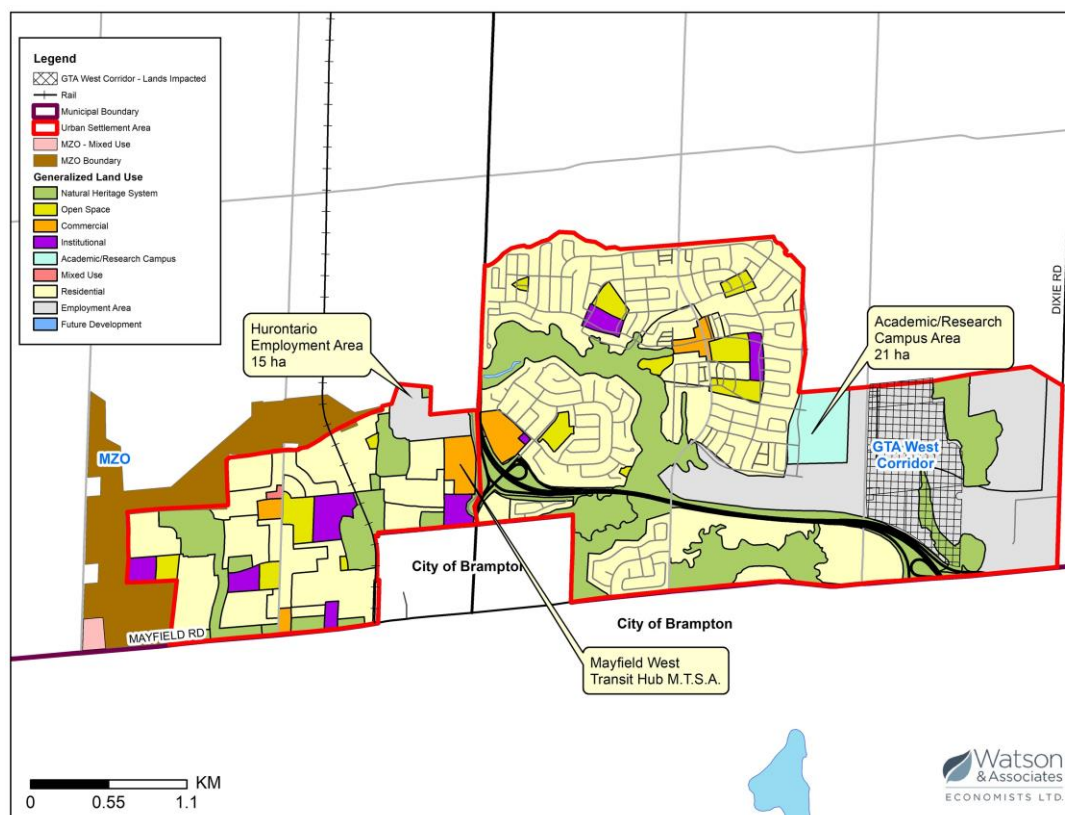
^[71] Town of Caledon Official Plan (2018), Mayfield West Secondary Plan, Stage 2, Table 7.6, p. 7-227.

^[72] Ibid., policy 7.12.3.2, p. 7-170.

^[73] Ibid., policy 7.12.12.4.2, p. 7-194.



Figure 5-2
Town of Caledon
Mayfield West
Strategic Employment Sites



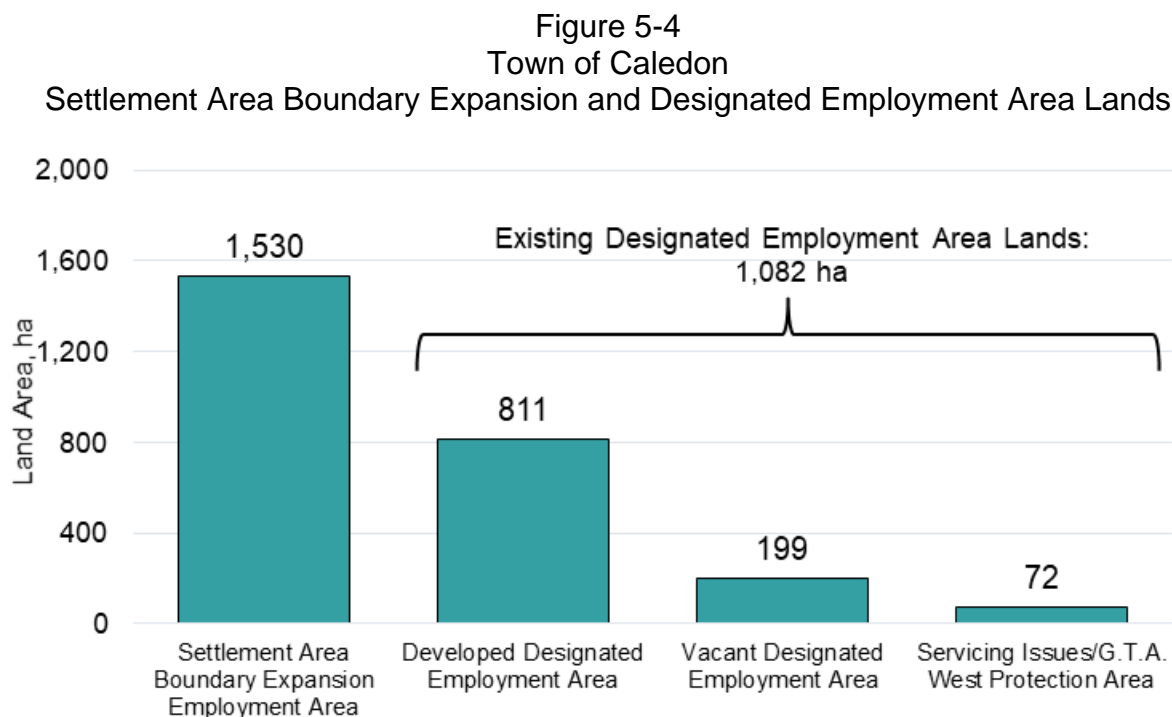
5.3.1.3 G.T.A. West Corridor (Highway 413)

The G.T.A. West Corridor, also referred to as Highway 413, is a proposed 400-series highway that would run through the Town of Caledon and span from Halton Hills to the City of Vaughan, as illustrated in Figure 5-3. The highway would provide connections to a series of highways in the northwest area of the G.T.A., including the 401, 407, 427 and 400 highways. The locational advantages of the Town with respect to the attraction of employment will be further enhanced with additional highway access to the area. It is important to note that while the highway would enhance the potential of Employment Area development in the Town, approximately 58 ha of designated vacant Employment Area lands in Mayfield West are protected for the G.T.A. West Corridor. These lands were previously identified in Figure 5-2.



5.3.1.4 Designated Employment Area and Settlement Area Boundary Expansion

Figure 5-4 provides a summary of existing vacant and developed lands, as well as the proposed Settlement Area Boundary Expansion land area. The Town of Caledon is planning for approximately 2,600 ha of Employment Area lands; approximately 41% is already designated and 59% is Settlement Area Boundary Expansion (S.A.B.E.). Vacant lands that are already designated total just under 200 ha. Approximately 72 ha of Employment Area lands are excluded from the inventory. Employment Area lands excluded from the inventory are within the identified within the G.T.A. West highway corridor by the Province (approximately 58 ha) and lands with servicing challenges in Bolton (approximately 17 ha). The land supply is further discussed in section 5.4.



Source: Watson & Associates Economists Ltd.

5.3.1.5 Developed Employment Area Lands

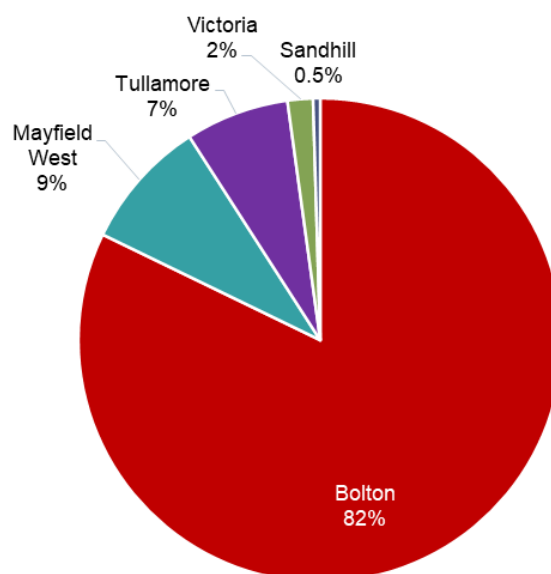
A total of 811 net ha (2,004 net acres) of Employment Area lands were developed within the Town of Caledon as of mid-year 2020. As summarized in Figure 5-5, most of the Town's developed employment lands are located within the Bolton Employment Area, accounting for 82% of the Town's development Employment Area land supply, followed



by the Mayfield West Employment Area at 9% and the Tullamore Employment Area at 7%. Victoria and Sandhill represent a small share of the developed Employment Area land.

The average Employment Area density on Employment Areas in Caledon is estimated at 14 jobs per gross ha (includes internal roads and infrastructure in accordance with the Growth Plan, 2019) or 20 jobs per net ha (excluding internal road and infrastructure).^[75]

Figure 5-5
Town of Caledon
Developed Employment Area Lands
by Employment Area as of Mid-2020



Source: Watson & Associates Economists Ltd.

5.3.2 Employment Sectors in the Bolton Employment Area

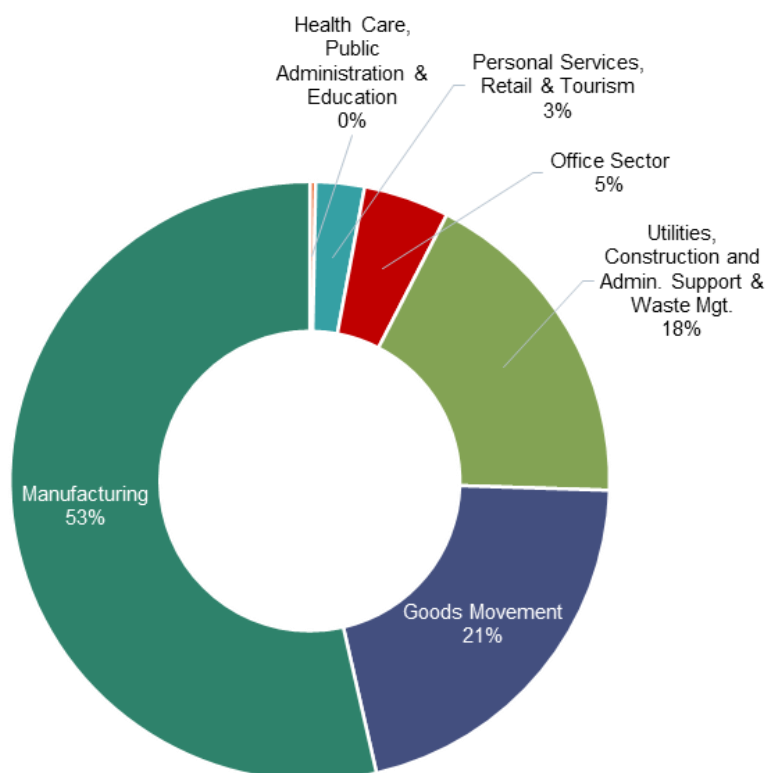
Figure 5-6 provides a summary of the employment base in the Bolton Employment Area, based on Town of Caledon employment as of 2018. As previously discussed, the Bolton Employment Area represents 82% of the Town's developed Employment Area land base.

^[75] Based on a review by Watson & Associates Economists Ltd.



As summarized in Figure 5-5, the manufacturing sector represents a large portion of the Town's employment in the Bolton Employment Area, approximately 53% of the employment base. Bolton has several established manufacturing clusters, including food manufacturing; machinery manufacturing; fabricated metal product manufacturing; and plastics and rubber products manufacturing. The Goods Movement sector is the second largest sector accommodated in the Bolton Employment Area, representing 21% of the employment based in the Employment Areas, followed by utilities, construction, administration and support, waste management and remediation services at 18%. Other non-industrial sectors represent approximately 8% of the employment base in the Bolton Employment Area.^[76]

Figure 5-6
Town of Caledon
Employment Areas
Employment by Sector, 2018



Source: Watson & Associates Economists Ltd. based on the Town of Caledon Employment Survey, 2018.

^[76] Based on the Town of Caledon Employment Survey, 2018.



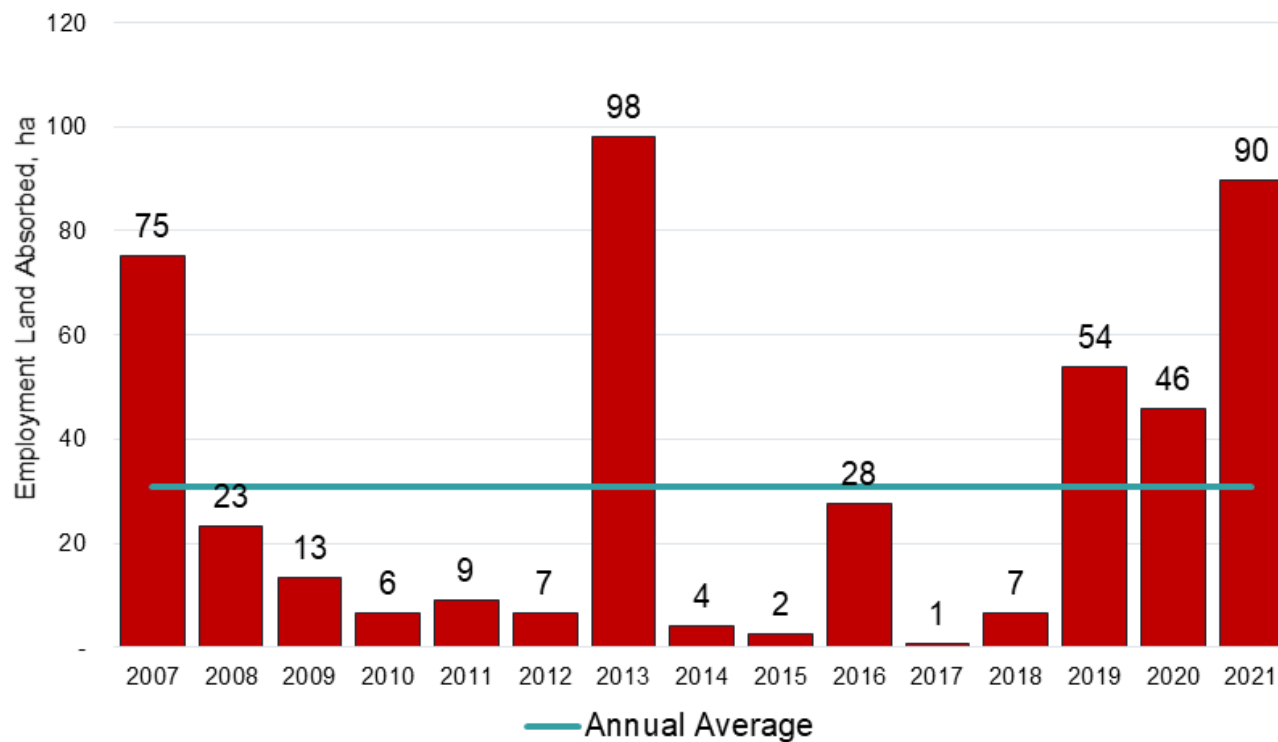
5.3.3 Employment Area Lands Absorption

Figures 5-7 and 5-8 provide a summary of historical Employment Area land absorption within the Town of Caledon from 2007 to 2021. Key findings are provided below.

- From 2007 to 2012, Employment Area land absorption averaged 22 ha (54 acres) annually and has significantly increased since 2013. Over the 2013 to 2021 period, Employment Area land absorption averaged 37 ha (91 acres) annually.
- Major Employment Area developments on Employment Area lands have represented a large share of the lands absorbed, including Canadian Tire Distribution Centre (73 ha); 12300 Coleraine Drive (74 ha); 100 Pillsworth Avenue – Home Depot (13 ha); Amazon Fulfillment Centre (25 ha); and the UPS Depot (35 ha). Collectively these developments represent just under at half of the Employment Area lands absorbed over the 2007 to 2021 period.
- As summarized in Figure 5-8, over the 2013 to 2021 period, approximately 80% of the Employment Area land absorbed has primarily accommodated the Goods Movement sector, while the remaining 20% has comprised a wide-range of employment sectors.



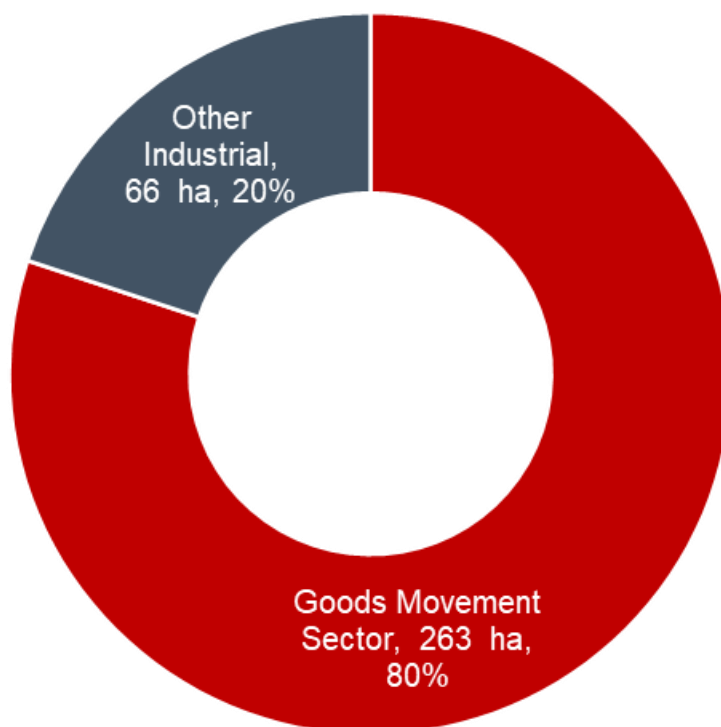
Figure 5-7
Town of Caledon
Employment Areas
Employment Area Land Absorption, ha
2007 to 2021



Source: Town of Caledon Economic Development, land absorption tracking data. Summarized by Watson & Associates Economists Ltd.



Figure 5-8
Town of Caledon
Employment Areas
Employment Area Land Absorption by Type
2013 to 2021



Source: Town of Caledon Economic Development, land absorption tracking data. Summarized by Watson & Associates Economists Ltd.



5.4 Existing Designated Employment Area Land Supply

As of mid-2020, the Town had approximately 199 ha of vacant lands designated as Employment Area.^[77] It is important to note since the compilation of the inventory, it is estimated by the Town's Economic Development staff that 89 ha (222 acres) of Employment Area lands was absorbed in 2021 based on building permit issuance data. This included a large site of 74 ha (183 acres) at 12300 Coleraine Drive.

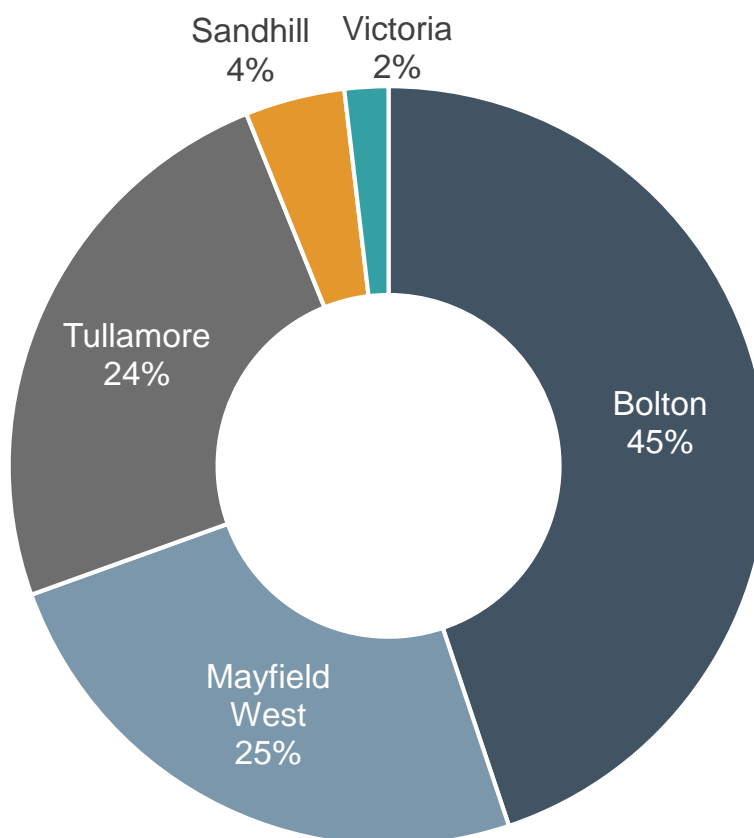
The inventory excludes Employment Area lands within the identified within the G.T.A. West highway corridor by the Province (approximately 58 ha) and lands with servicing challenges in Bolton (approximately 17 ha) by 2051. Figure 5-9 provides a summary of the vacant Employment Area lands by area. As summarized, approximately 45% of the vacant employment land supply is within Bolton, followed by Mayfield West at 25% and Tullamore at 24%. The remaining 6% of the vacant Employment Area land supply is located within Victoria and Sandhill.

As summarized in Figure 5-10, over a third of the Town's existing vacant Employment Area has active development applications, including those with approved and proposed development applications.

^[77] The Region of Peel has estimated the vacant Employment Area land supply in the Town of Caledon at 282 ha; however, Peel Region's vacant land supply estimate includes the lands identified within the G.T.A. West Corridor Area (lands in Mayfield West between Heart Lake Road and Dixie Road). Information is based on mapping and tables provided in the Region of Peel 2051 Land Needs Assessment Report, August 2021.



Figure 5-9
Town of Caledon
Employment Areas
Vacant Designated Employment Area Land Supply by Area, Mid-2020



Source: Watson & Associates Economists Ltd.

Figure 5-10
Town of Caledon
Employment Areas
Vacant Designated Employment Area Land Supply, Mid-2020

Status	Land Area, ha
Development Anticipated (Approved/Proposed)	77
Vacant No Application	122
Total Vacant	199

Source: Watson & Associates Economists Ltd.



Additional maps and figures regarding the Town's vacant and developed land supply are provided in Appendix C.

5.5 Urban Employment Area Land Needs to 2051

Through its M.C.R., the Region of Peel has identified an Urban Employment Area land need of approximately 1,530 ha for the Town of Caledon. These additional lands are required to provide for 38,000 Employment Area jobs which cannot be accommodated within the Town's designated Employment Areas over the 2051 planning horizon.^[78]

Figure 5-11 provides a summary of the land needs analysis prepared by the Region of Peel. As summarized, approximately 30% of the Town's urban employment growth is anticipated to be accommodated on lands that are already designated in the Town of Caledon, including development on vacant lands and through intensification. The Region of Peel has identified a target density of 24.8 jobs/ha associated with the 1,530 gross ha Employment Area expansion lands (Settlement Area Boundary Expansion (S.A.B.E.)).

Figure 5-11
Town of Caledon
Employment Area Land Needs to 2051

Urban Employment Area Land Needs	Caledon	%
2021-2051 Employment Area Growth	54,530	
Employment Growth on Designated Lands	16,500	30%
Employment Growth Not Accommodated on Designated Lands	38,030	70%
Density on Settlement Area Boundary Expansion Lands (jobs/gross ha)	24.8	
Settlement Area Boundary Expansion Lands Required, ha	1,530	

Source: Derived from the Region of Peel M.C.R. Land Needs Assessment Report based on an addendum to the L.N.A. received by the Town of Caledon.

Summarized by Watson & Associates Economists Ltd.

^[78] Based on tables provided in the Region of Peel 2051 Land Needs Assessment Report, August 2021.



The Peel Region forecast anticipates a significant amount of employment growth across a broad spectrum of employment uses and over the long-term planning horizon. Section 5.7, herein, provides further direction with respect to the general timing of development, target sectors and opportunities and challenges for each of the Town's existing and planned Employment Areas. Development phasing is to be coordinated with the Region to ensure that new Employment Areas are planned and phased in accordance with anticipated market demand and timing of provincial, regional and local infrastructure investments.

Settlement Area Boundary Expansion – New Employment Areas

The Region of Peel has prepared draft mapping of the Focus Study Areas (F.S.A.s) for the proposed Settlement Area Boundary Expansion Employment Area of 1,530 in the Town of Caledon. These lands are currently designated as primarily Prime Agriculture and are outside the Greenbelt (referred to as “whitebelt” lands). The F.S.A.s generally include areas surrounding the following existing settlements that are outside the Greenbelt:

- Bolton – to the east and north;
- Mayfield West – surrounding;
- Tullamore – to the east, west and north; and
- Victoria/Campbell's Cross – surrounding.

An area in the southwest of Caledon near Mayfield Road and Mississauga Road is also identified. As part of the Settlement Area Boundary Expansion, the Region in collaboration with the Town of Caledon will be required to identify the boundaries of the new Community Areas and new Employment Areas.

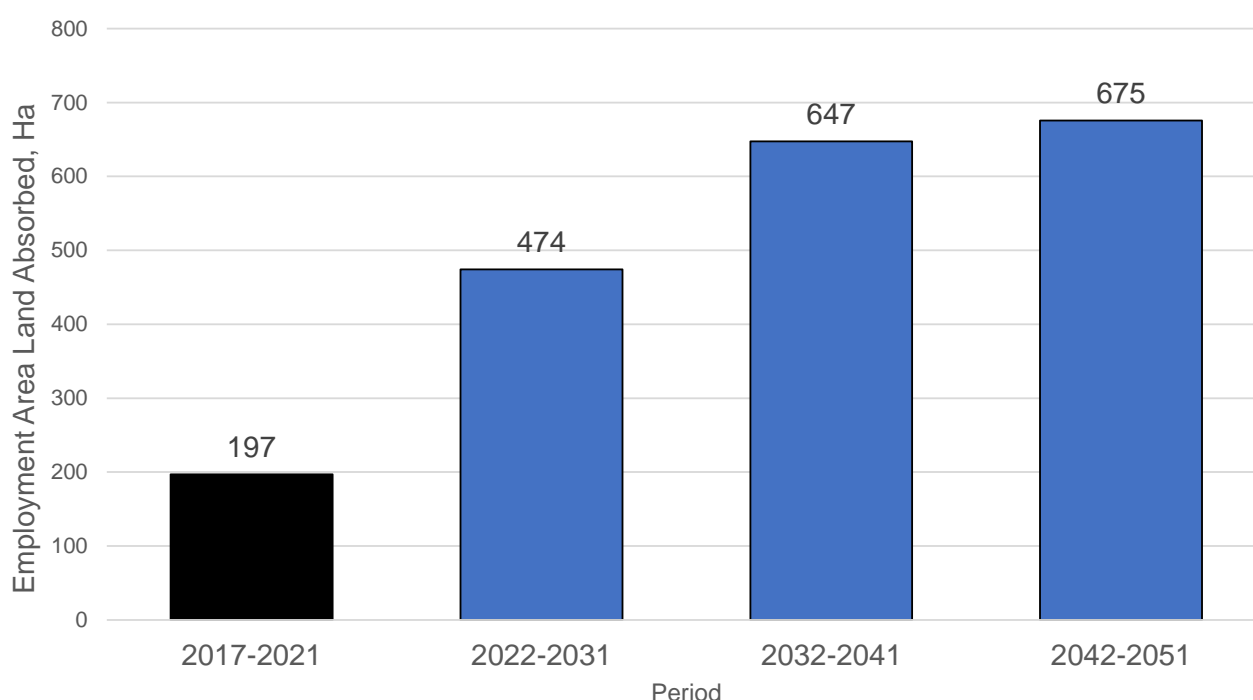
5.6 Employment Area Land Absorption to 2051

Based on the long-term Employment Area land needs identified for the Town of Caledon through the Region of Peel M.C.R., the Town is anticipated to absorb approximately 60 ha of Employment Area land annually over the next 30 years. This assumes that approximately 17% of the Town's Employment Area growth will be accommodated through intensification. Figure 5-12 provides a summary of the Employment Area absorption forecast in five-year increments. It is anticipated that the Town will completely deplete its remaining supply of serviced Employment Area lands



within the next five years if new Employment Areas are not added to the Town's Employment Area land supply. Efforts by the Town and the Region should focus on expediting the serviced supply of designated Employment Area lands within the Town of Caledon. The Town is currently undertaking an Industrial Business Case Study which will explore potential opportunities to increase the Town's available supply of "shovel-ready" industrial lands.

Figure 5-12
Town of Caledon
Forecast Employment Area Land Absorption to 2051
10-Year Periods



Source: Watson & Associates Economists Ltd. based on the Region of Peel M.C.R. L.N.A.

As previously discussed, the Goods Movement sector is an integral part of the economy in Peel Region. Figure 5-13 provides a summary of forecast employment growth related to the Goods Movement sector in Peel from 2021 to 2051. This forecast has



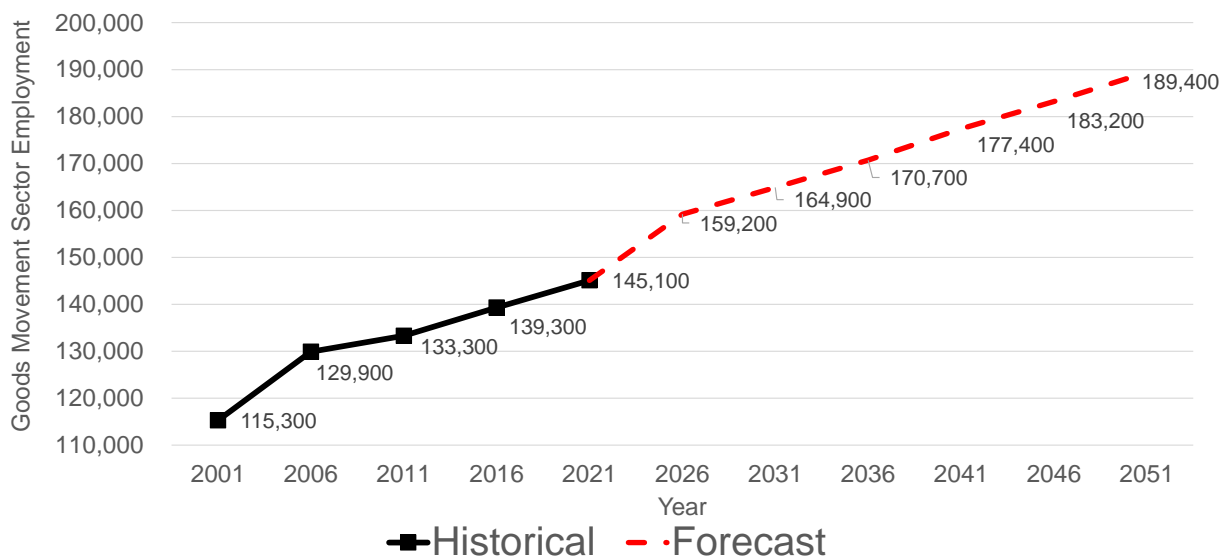
been prepared as part of this report, building on the Goods Movement Discussion Paper prepared for the Region of Peel in 2015.^[79] Key highlights include the following:

- With over 145,000 jobs directly associated with this sector, Peel Region has the largest and most concentrated Goods Movement cluster in the G.T.H.A. As such, this sector is a major contributor to the Region's employment base, economic output and tax assessment base.
- In 2021 the Goods Movement sector represented approximately 20% of the total employment base in Peel Region. By 2051 the Goods Movement sector is forecast to increase by over 44,000 jobs, representing approximately 13% of total forecast employment growth in Peel Region.
- As the Region's supply of vacant greenfield employment lands continues to diminish in the City of Brampton, a greater share of employment is anticipated for the Town of Caledon. It is estimated that the Town of Caledon will accommodate approximately 37% of total Peel Region Goods Movement employment growth, representing approximately 16,200 jobs.

^[79] Region of Peel, Goods Movement Employment Density Discussion Paper, prepared by Watson & Associates Economists Ltd., WSP and Meridian Planning, October 21, 2015.

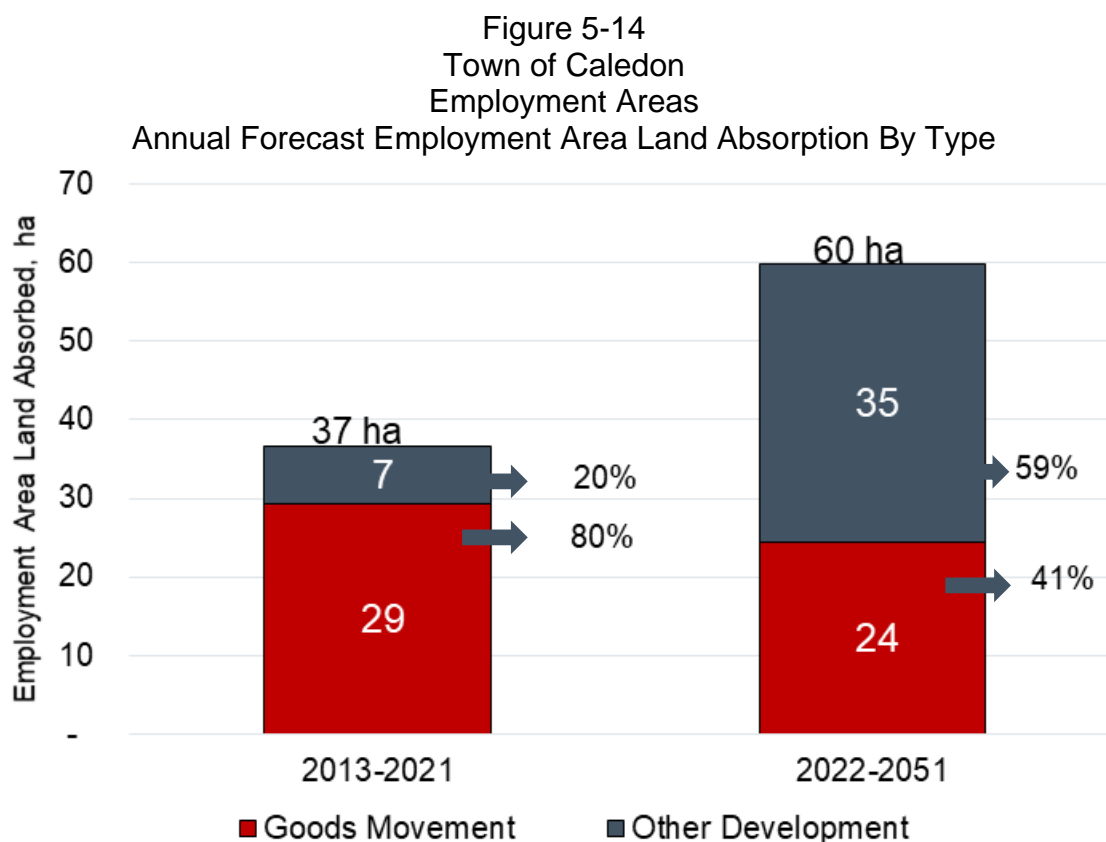


Figure 5-13
Region of Peel
Goods Movement Sector Forecast to 2051



Source: 2001 to 2016 based on Statistics Canada data. 2021 is an estimate based on a review of background by the Region of Peel and the Town of Caledon Employment Survey. 2021 to 2051 is a forecast by Watson & Associates Economists Ltd.

While the Town of Caledon is anticipated to take just over a third of the Region of Peel's Goods Movement employment over the next 30 years, it is expected that the Town will also accommodate a large share of other jobs in Employment Areas. As summarized in Figure 5-14, the Goods Movement sector is anticipated to represent approximately 41% of the Employment Area land absorbed, while the largest share (59%) will comprise Employment Area land absorbed for non-Goods-Movement development uses. It is important to recognize that a significant increase in annual Employment Area land absorption is anticipated for the Town of Caledon associated with non-Goods-Movement development uses compared to historical trends. More specifically, annual Employment Area land absorption associated with non-Goods-Movement development is forecast to increase significantly from 7 ha over the 2013 to 2021 period to 35 ha over the 2022 to 2051 period.



Source: Watson & Associates Economists Ltd.

5.7 Employment Sector Opportunities by Employment Area

5.7.1 Vision and Target Sectors for Employment Areas

The following section provides a summary of potential employment opportunities for each Employment Area in the Town based on locational and market attributes, as well as policy objectives.

5.7.1.1 Mayfield West Employment Areas

Overview

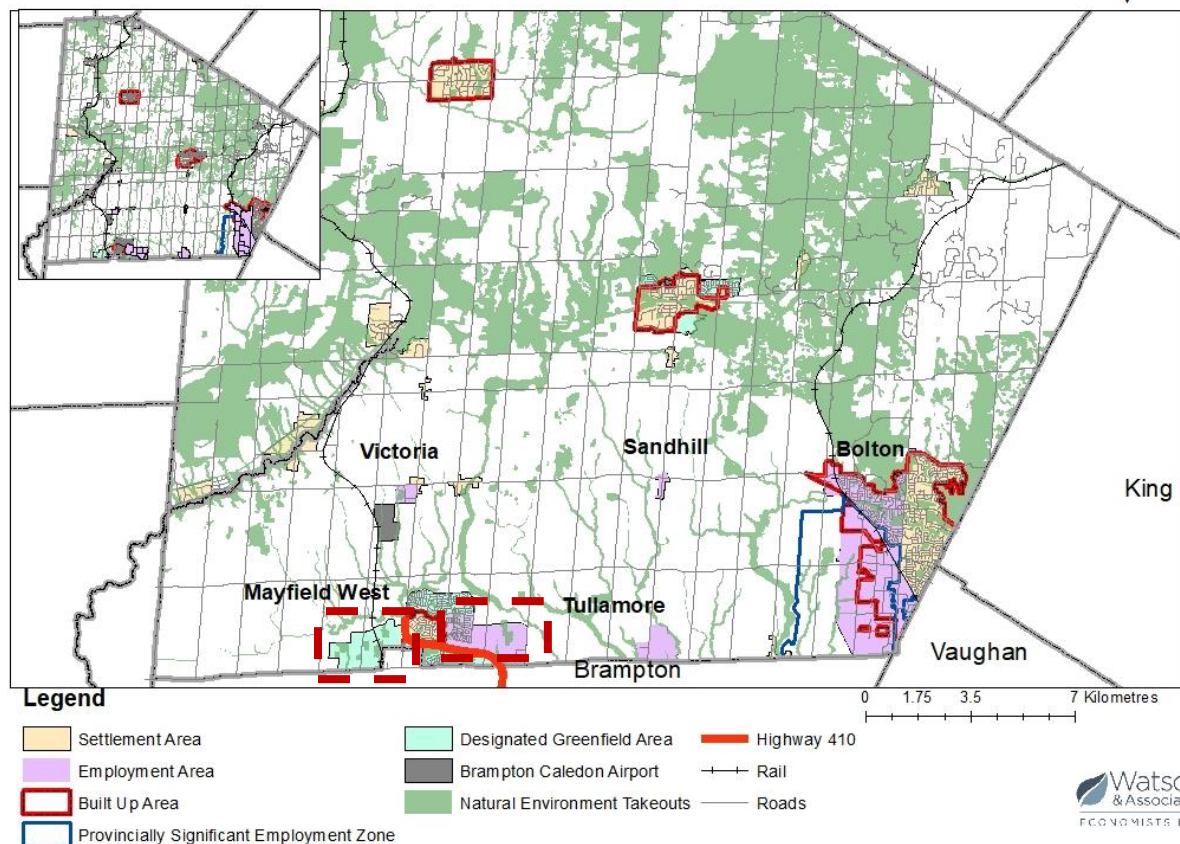
This Employment Area provides opportunities for near-term and longer-term employment uses due to its access and visibility to the existing Highway 410 and the proposed Highway 413. Furthermore, given the geographic location of Mayfield West in south Caledon, directly north of the City of Brampton, this area is better positioned than



some other future Employment Areas in the Town for future servicing. Due to the physical configuration of Mayfield West, Highway 410 bisects the overall Employment Area into two parts, one east and one west of the Mayfield West community. Figure 5-16a provides a map of Mayfield West, including the location of existing Employment Areas and the general location of future Employment Areas within the context of the Town's other existing designated Employment Areas. The dotted lines illustrated on the map identified the general focus area for Settlement Area Boundary Expansion Employment Area and not the extent of the Employment Area Settlement Area Boundary Expansion.

Figure 5-16a
Town of Caledon
Location of Mayfield West Employment Areas
Overview Map

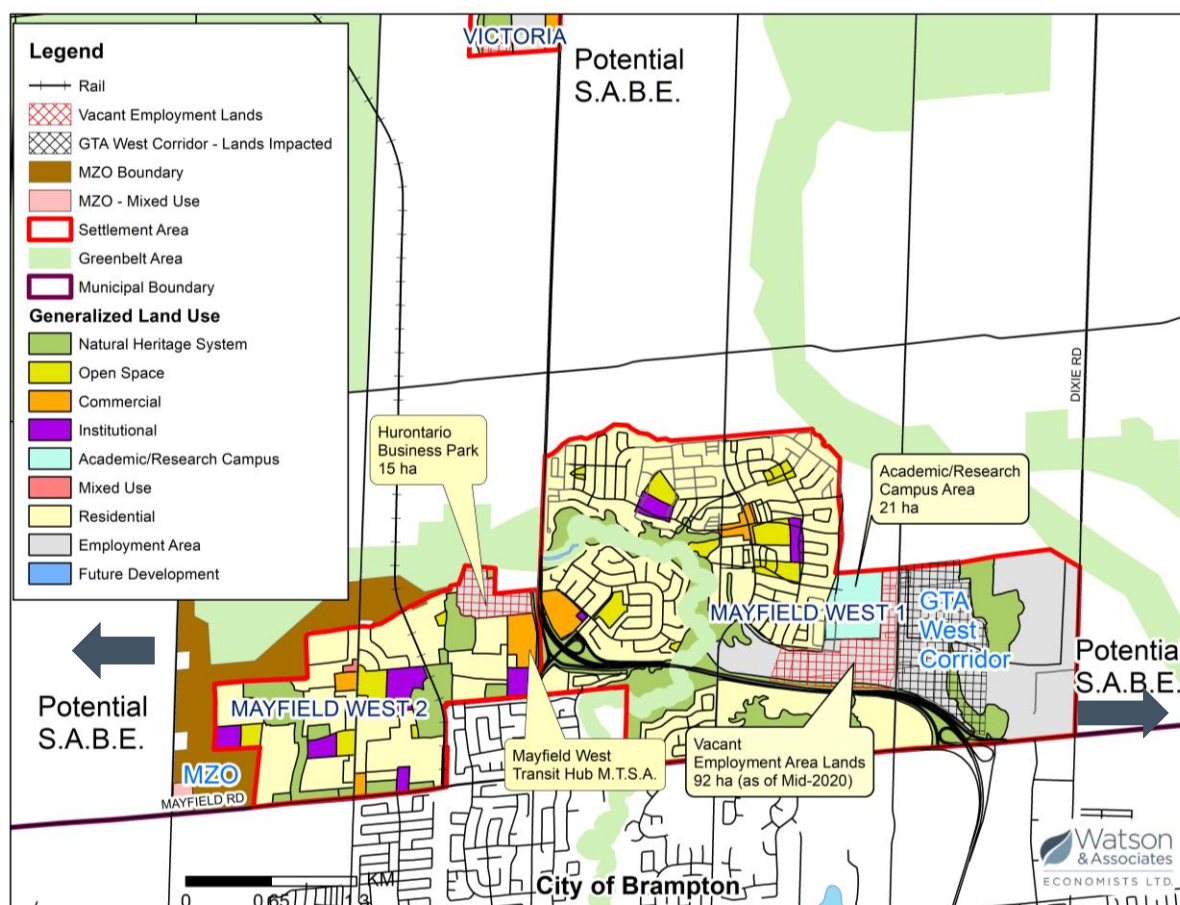
Town of Caledon





As previously discussed, Mayfield West has two strategic employment sites – Hurontario Business Park and Academic/Research Campus. The proposed Mayfield West Transit Hub M.T.S.A. provides an opportunity to integrate this area with the rest of Peel Region and the broader G.T.H.A., as identified on Figure 5-16b. The Victoria Employment Area is located just north of Mayfield West and is also identified as Employment Area Settlement Area Boundary Expansion (S.A.B.E.) lands.

Figure 5-16b
Town of Caledon
Mayfield West
Existing Designated and Potential Settlement Area Boundary Expansion

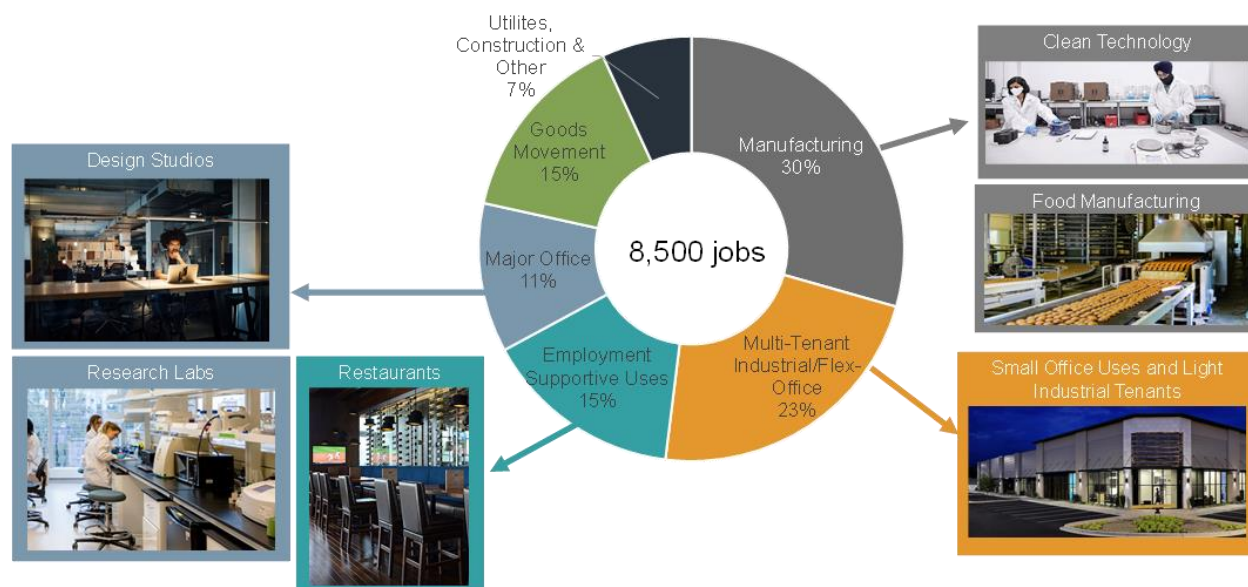


As summarized in Figure 5-16c, it is anticipated that Mayfield West will attract a range of sectors and uses. More specifically:



- Major Office, multi-tenant/flex office and employment-supportive uses are anticipated to be accommodated in Hurontario Business Park (approximately 1,100 jobs) which is located in proximity to the Mayfield West Transit Hub and Highway 410.
- With access to the proposed G.T.A. West Corridor (Highway 413), the vacant designated Employment Area lands and potential Settlement Area Boundary Expansion lands to the east are anticipated to accommodate manufacturing uses, and to a lesser extent utilities, construction and other buildings. Lands near Highway 413 should be strategy protected for uses that require access to Goods Movement corridors.
- Potential Settlement Area Boundary Expansion lands to the west are recommended to be better integrated into the Mayfield West Stage 2 and M.Z.O. (Minster's Zoning Order) lands for residential uses.

Figure 5-16c
Town of Caledon
Mayfield West Employment Areas
Employment Growth Allocation by Type, 2021 to 2051





5.7.1.2 Bolton Employment Areas

Overview

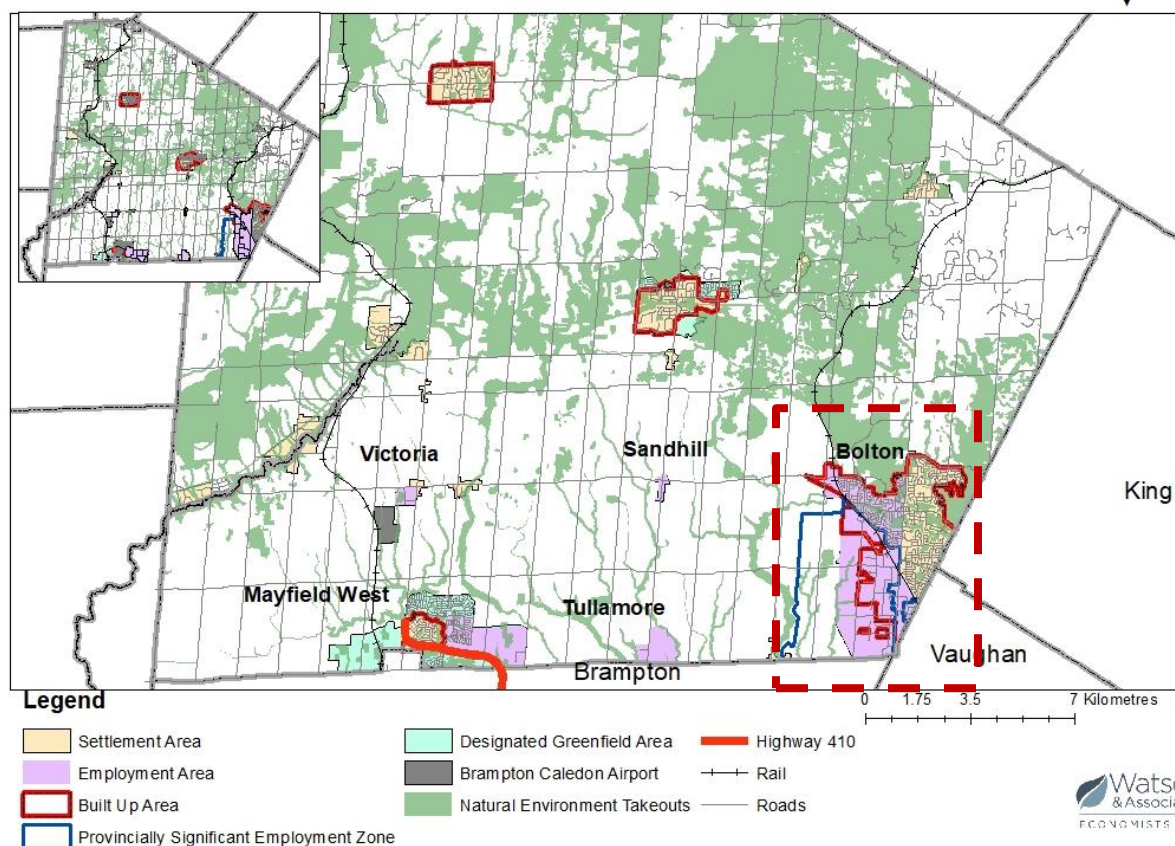
The Bolton Employment Area is an existing and well-established Employment Area. The most recent phase of the Employment Area, Coleraine West Employment Area, has been successful in attracting development related to the Goods Movement sector. A large portion of these lands within this new Employment Area phase are already developed and plans are underway for development on several properties.

The Bolton Employment Area is in proximity to major transportation infrastructure such as major highways, intermodal facilities, and Toronto Pearson International Airport. The majority of the lands in Bolton are located in P.S.E.Z. 15 which spans through Caledon, Vaughan, and Toronto. Over the forecast period, it is expected that the Bolton Employment Area will be the primary location for office uses given its proximity to Bolton and regional transit opportunities such as GO Transit.



Figure 5-17a
Town of Caledon
Location of Bolton Employment Areas
Overview Map

Town of Caledon



As previously discussed, there is a proposed M.T.S.A. in Bolton near the northwestern fringe of the urban boundary. The M.T.S.A. is a greenfield site and is removed from an established non-residential or mixed-use node, such as the downtown. A portion of the M.T.S.A. is located within the Bolton Employment Area. The existing designated Employment Areas surrounding this site and potential opportunities for Employment Area Settlement Area Boundary Expansion provide an opportunity to accommodate high-density employment uses, such as Major Office. Settlement Area Boundary Expansion opportunities in the south would be dependent on the location of new Community Areas but may provide opportunities for manufacturing and other general industrial uses building on the synergies of Bolton's established manufacturing clusters. It is assumed that any potential Settlement Area Boundary Expansion lands in the



northeast (irregular configuration, as show on map in Figure 5-17) would not accommodate employment given the location of existing Community Area uses.

Figure 5-17b
Town of Caledon
Bolton Employment Areas
Existing Designated and Potential Settlement Area Boundary Expansion

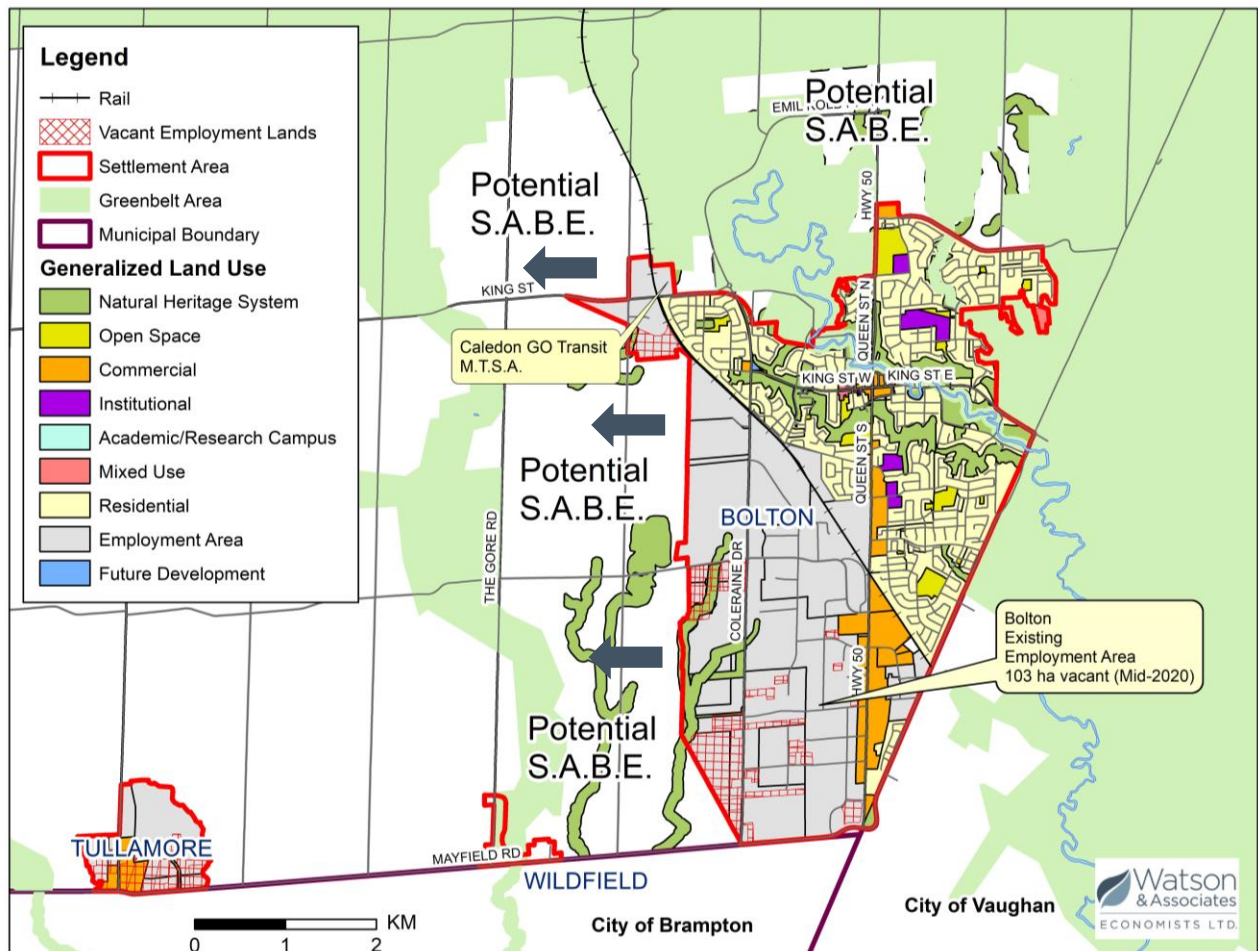
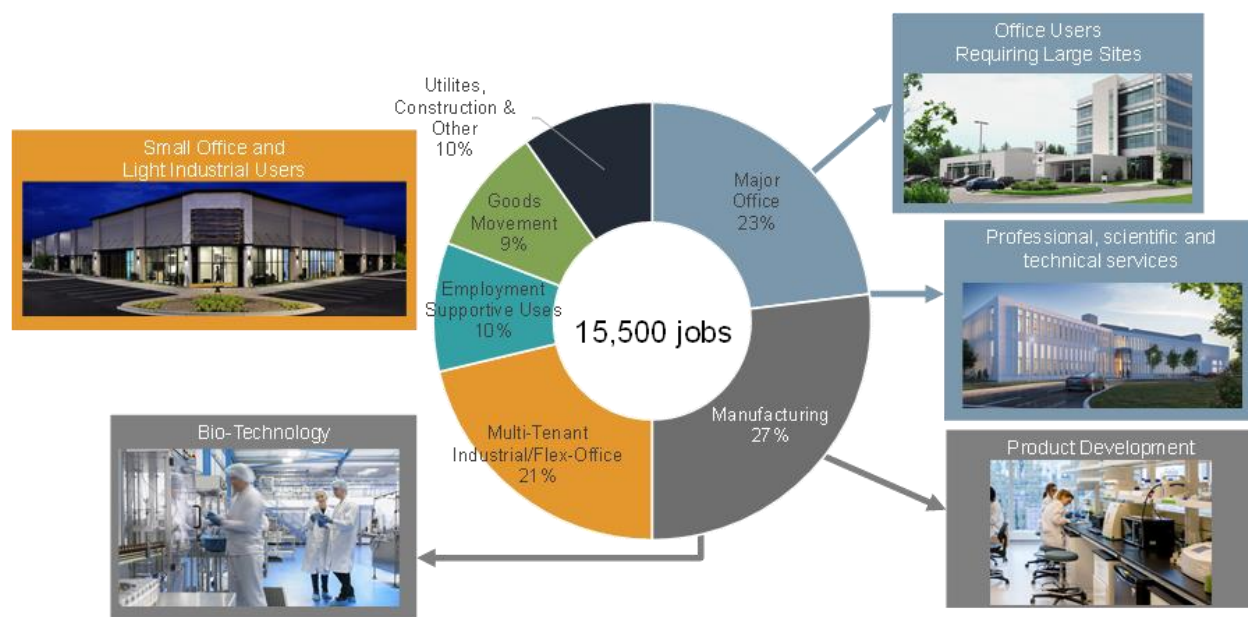


Figure 5-17c provides a summary of potential uses and sectors that could be accommodated in Bolton Employment Area. Bolton is anticipated to accommodate a greater share of Major Office uses and Prestige uses as well as a large manufacturing share given its existing base of manufacturers.



Figure 5-17c
Town of Caledon
Bolton Employment Areas
Employment Growth Allocation by Type, 2021 to 2051



5.7.1.3 Tullamore Employment Areas

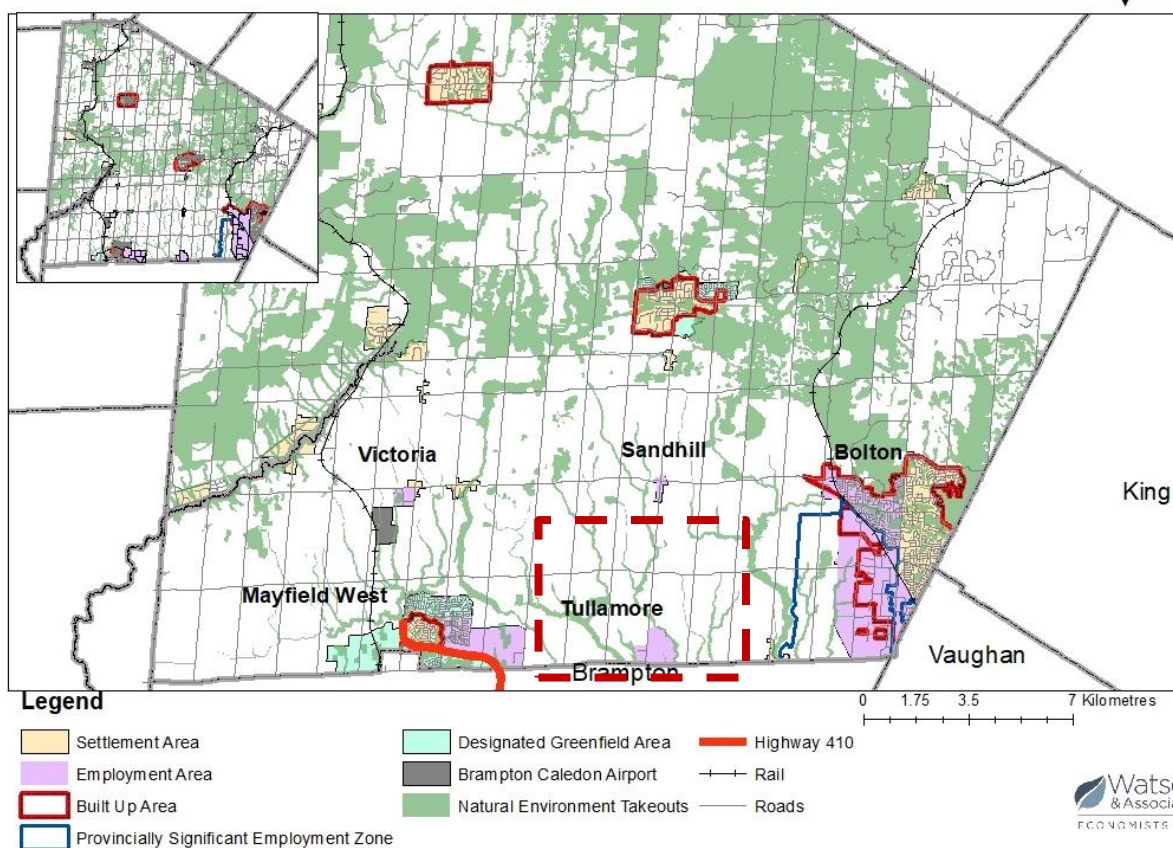
Overview

Tullamore currently has a small established industrial base in addition to some active agricultural operations in the area. The completion of the G.T.A. West Corridor (Highway 413) could be a significant catalyst for future employment demand in the area. Tullamore is currently well buffered from existing urban Community Area uses to the north, west and east. Planning consideration is required with respect to land-use compatibility between the Tullamore Employment Area and existing urban lands to the south in the City of Brampton. Airport Road and Mayfield Road are major regional roads in the area. Mayfield Road provides access to Highway 410.



Figure 5-18a
Town of Caledon
Location of Tullamore Employment Areas
Overview Map

Town of Caledon



As illustrated in Figure 5-18b, Tullamore is surrounded by a vast existing rural area with good connectivity to Goods Movement corridors. The Tullamore area provides an opportunity to support the Region's Goods Movement sector, as well as to mitigate the impacts of Goods Movement in the Town's Community Areas by clustering Goods Movement uses in this Employment Area. Settlement Area Boundary Expansion opportunities for Community Areas between Mayfield West and Bolton should consider the protection of the Goods Movement corridors as Employment Areas.



Figure 5-18b
Town of Caledon
Tullamore Employment Areas
Existing Designated and Potential Settlement Area Boundary Expansion

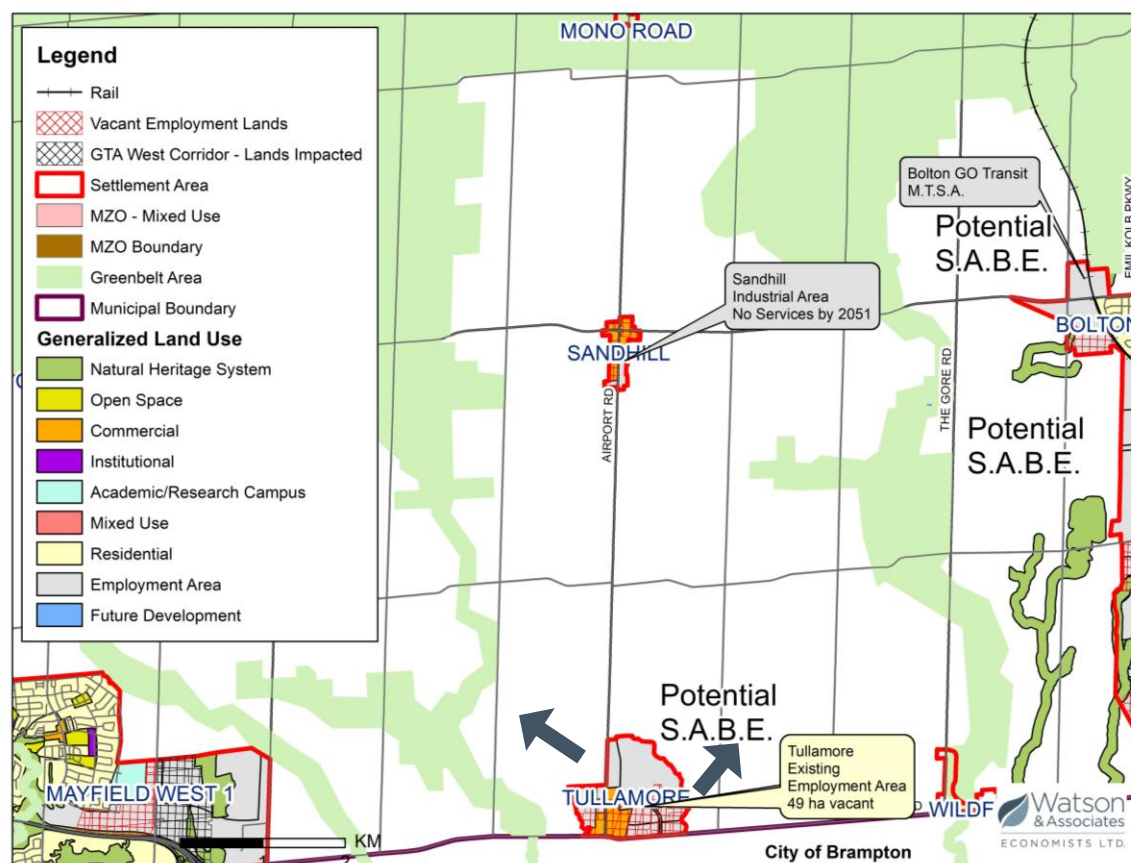
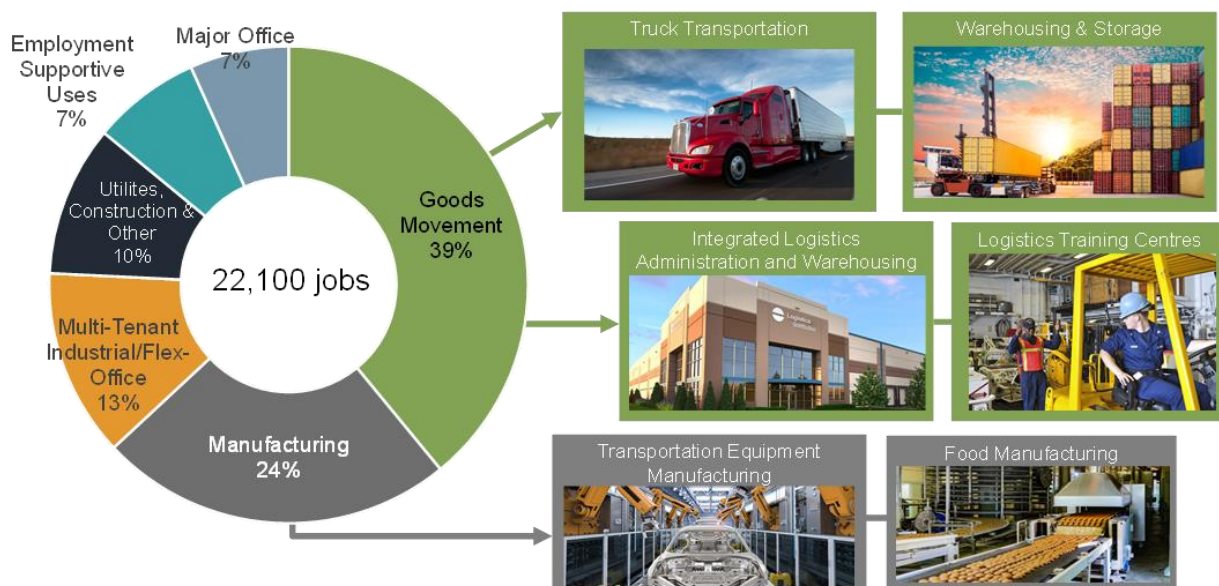


Figure 5-18c provides a summary of potential uses and sectors that could be accommodated in the Tullamore Employment Area. Tullamore is anticipated to accommodate a greater share of Goods Movement sector employment, including a greater depth of uses within this sector, such as integrated office and logistics and major office uses related to the Goods Movement sector. Tullamore is also anticipated to accommodate manufacturing, multi-tenant industrial/flex office, employment-supportive uses (related to Goods Movement), utilities, construction and other buildings.



Figure 5-18c
Town of Caledon
Tullamore Employment Areas
Employment Growth Allocation by Type, 2021 to 2051



5.7.1.4 Victoria/Brampton-Caledon Airport Employment Area

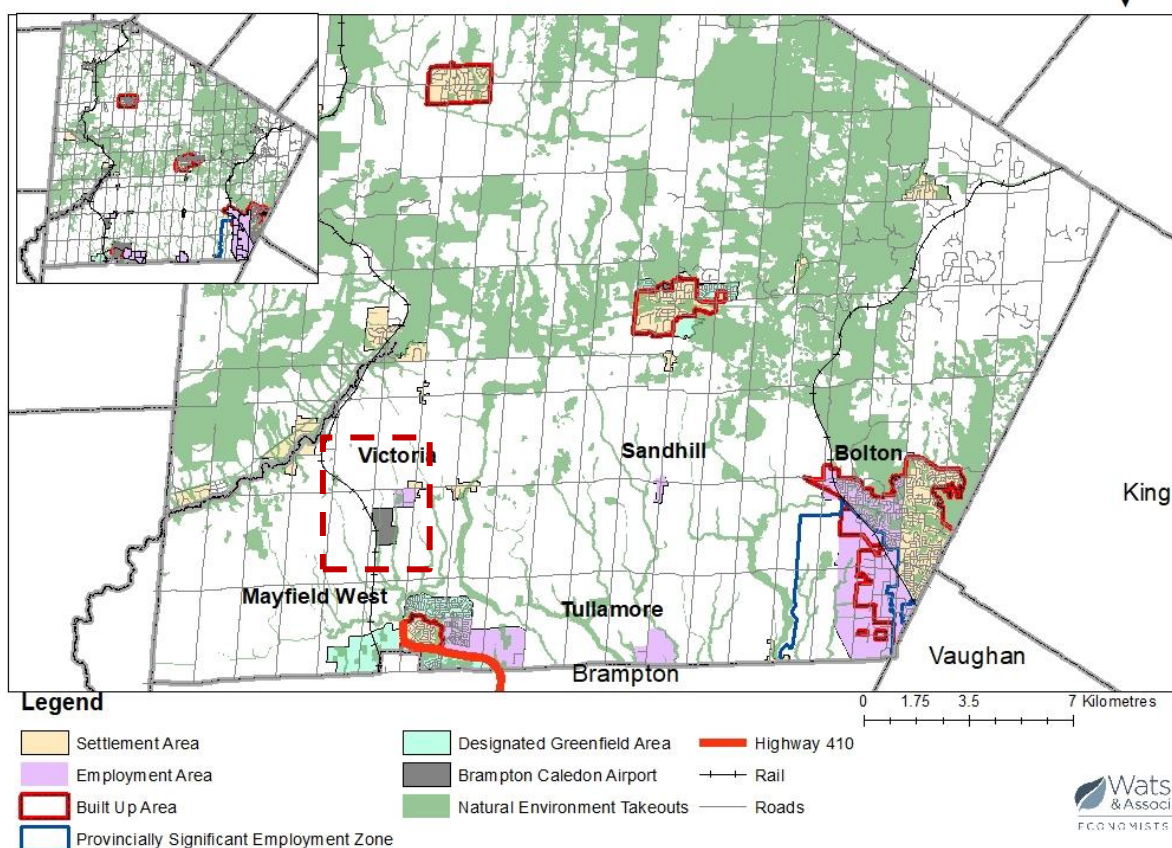
Overview

Victoria/Brampton-Caledon Airport Employment Area is located north of Mayfield West and is bounded by the Greenbelt on the north, east, and west sides. The area is characterized by its flat topography and as a result would be suitable for land extensive employment uses. In addition, this Employment Area has the Brampton-Caledon Airport, which has the potential to attract airport-related employment uses to the area including the aerospace sector.



Figure 5-19a
Town of Caledon
Location of Victoria/Brampton-Caledon Airport Employment Area
Overview Map

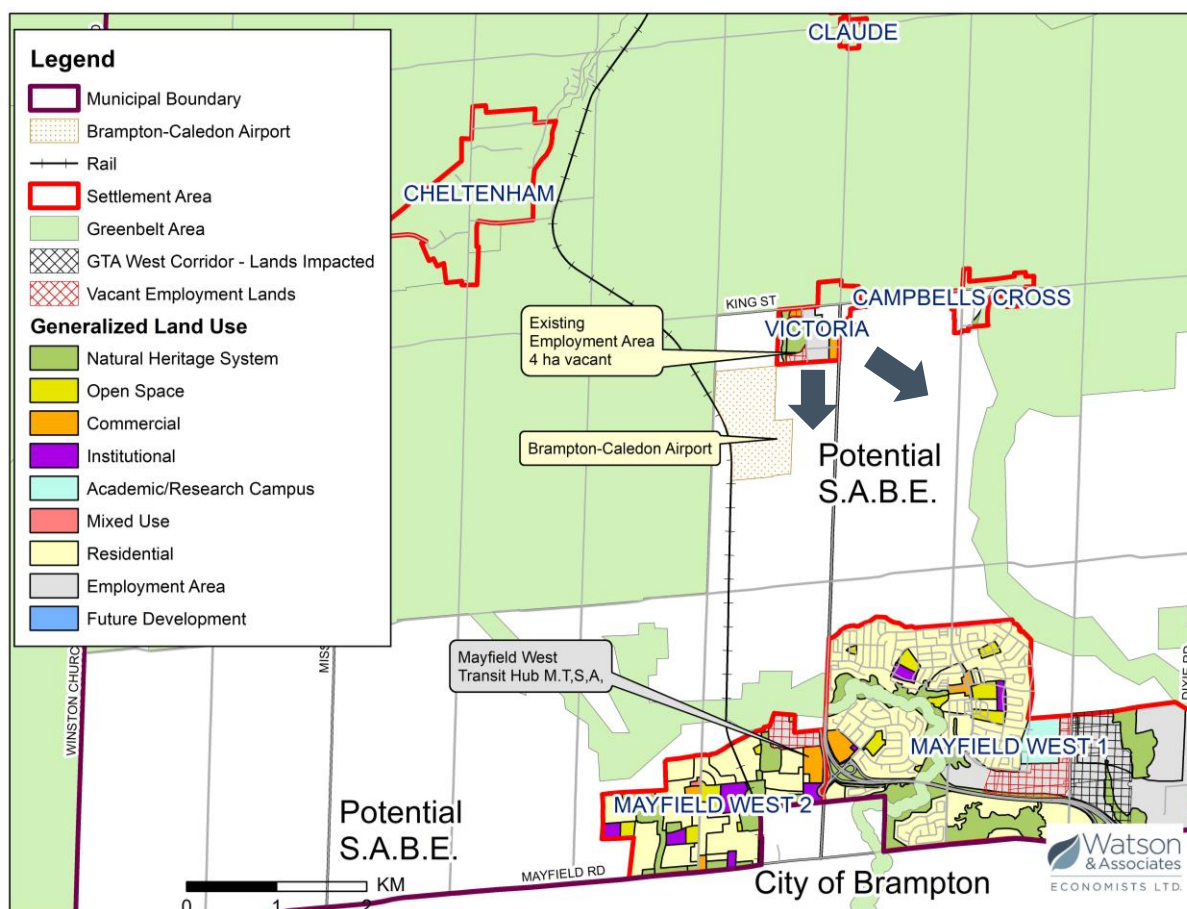
Town of Caledon



The Victoria/Brampton-Caledon Airport Employment Area currently has a limited supply of designated vacant Employment Area lands (approximately 4 ha). Settlement Area Boundary Expansion options can only occur south of King Street due to the Greenbelt. There is an opportunity to build synergies with Employment Areas in Mayfield West given their proximity. Planning for Community Areas in this area should consider protecting Hurontario Street as a Goods Movement corridor. Hurontario Street provides this area with access to regional and provincial highways, in particular Highway 410.



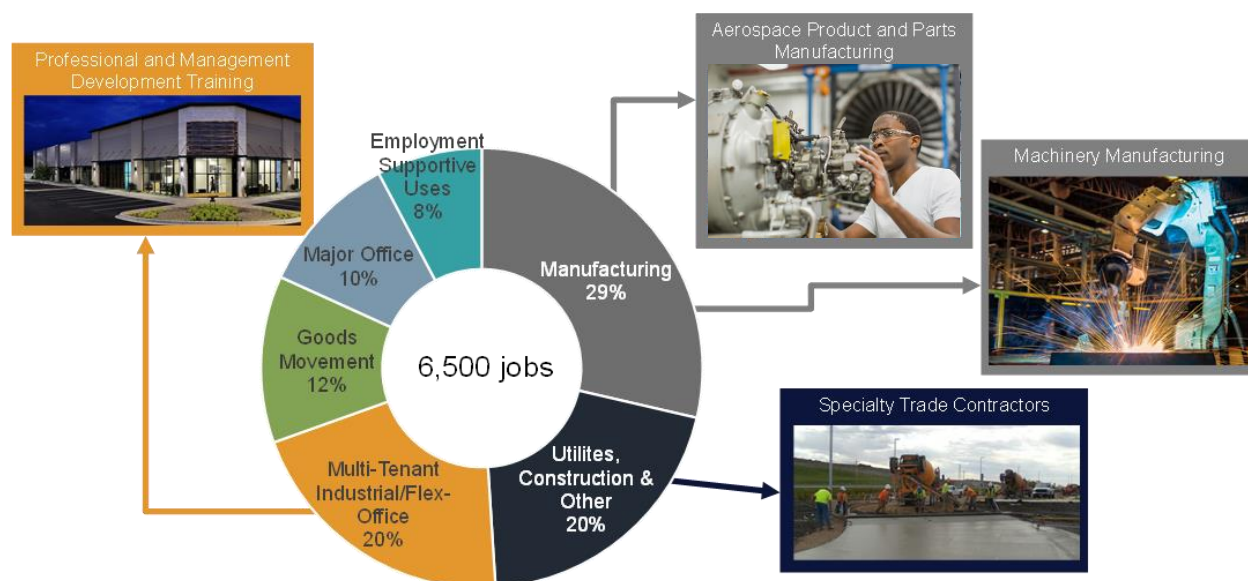
Figure 5-19b
Town of Caledon
Victoria/Brampton-Caledon Airport Employment Area
Existing Designated and Potential Settlement Area Boundary Expansion



The Victoria/Brampton-Caledon Airport Employment Area is envisioned to function as an Employment Area that attracts uses which are synergistic to the airport. This area may require economic development and planning initiatives to facilitate targeted growth. Figure 5-17c provides a summary of potential uses and sectors that could be accommodated in the Victoria/Brampton-Caledon Airport Employment Area.



Figure 5-19c
Town of Caledon
Victoria/Brampton-Caledon Airport Employment Area
Employment Growth Allocation by Type, 2021 to 2051



5.7.1.5 Mississauga Road/Mayfield Road Employment Area

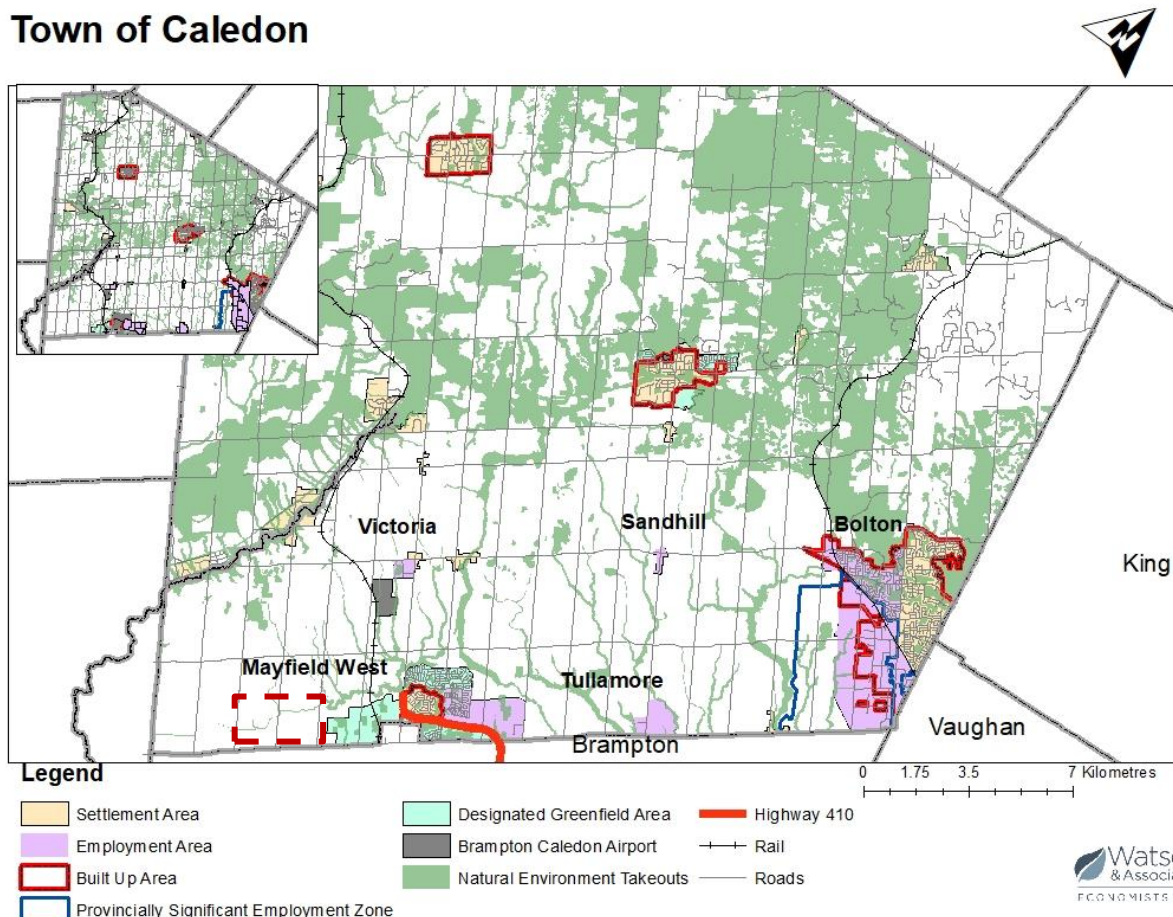
Overview

This Employment Area is adjacent to the Mayfield West Employment Area. It is a relatively small Employment Area with an existing canola research facility (Corteva Agriscience) at Mississauga Road and Mayfield Road.



Figure 5-20a
Town of Caledon
Location of Mississauga Road/Mayfield Road Employment Area
(West of Mayfield West)
Overview Map

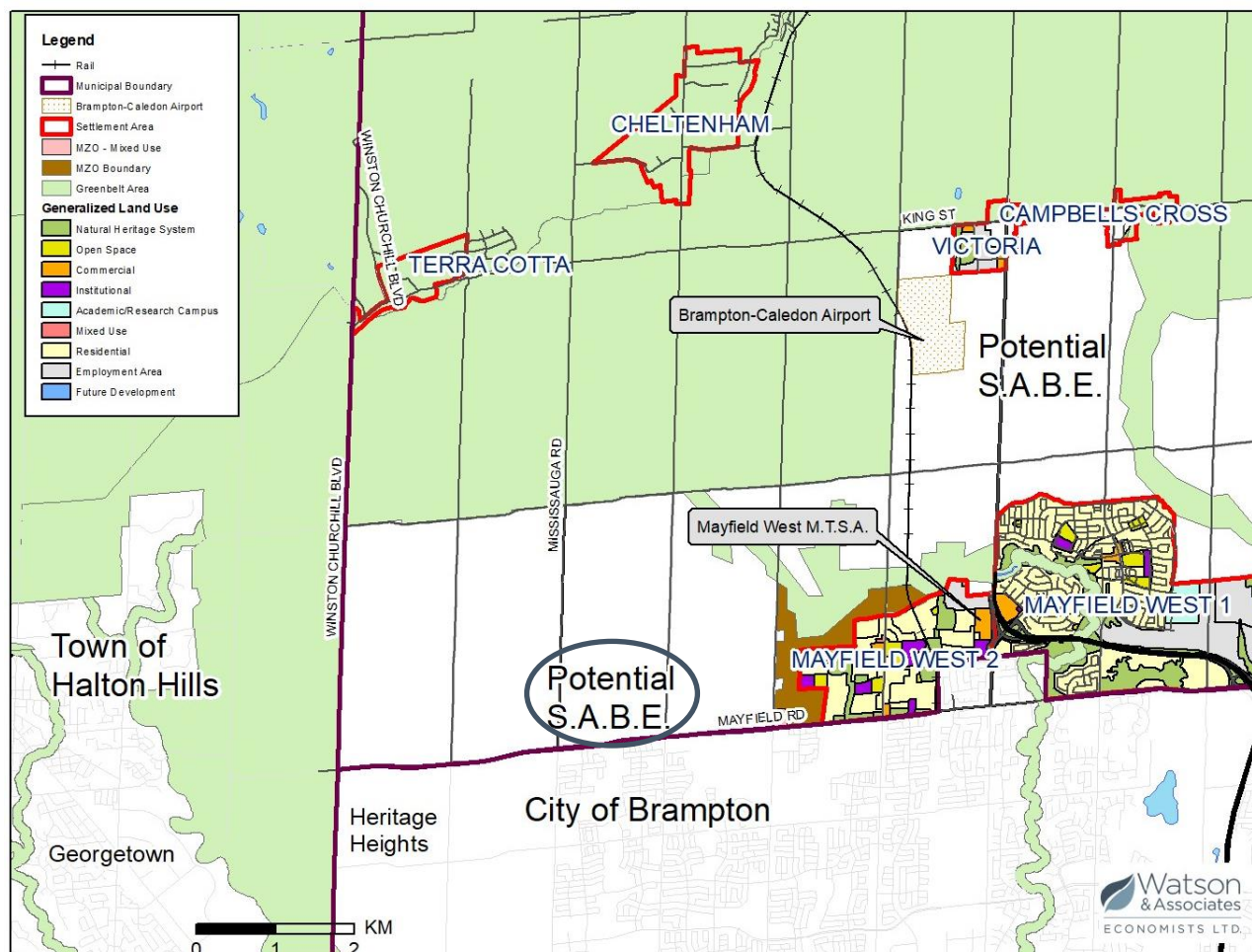
Town of Caledon



This Employment Area is surrounded by a vast rural area to the north and west. To the south of this area is the City of Brampton and to the west is the Town of Halton Hills. As such, the Town will need to consider cross-jurisdictional issues when planning for Employment Area uses in this location. Within Halton Hills, there are no plans for urban uses adjacent to the Town of Caledon boundary. Employment Area uses in Halton Hills are planned to be situated along Winston Churchill Boulevard south of Georgetown which is further south and adjacent to the City of Brampton.



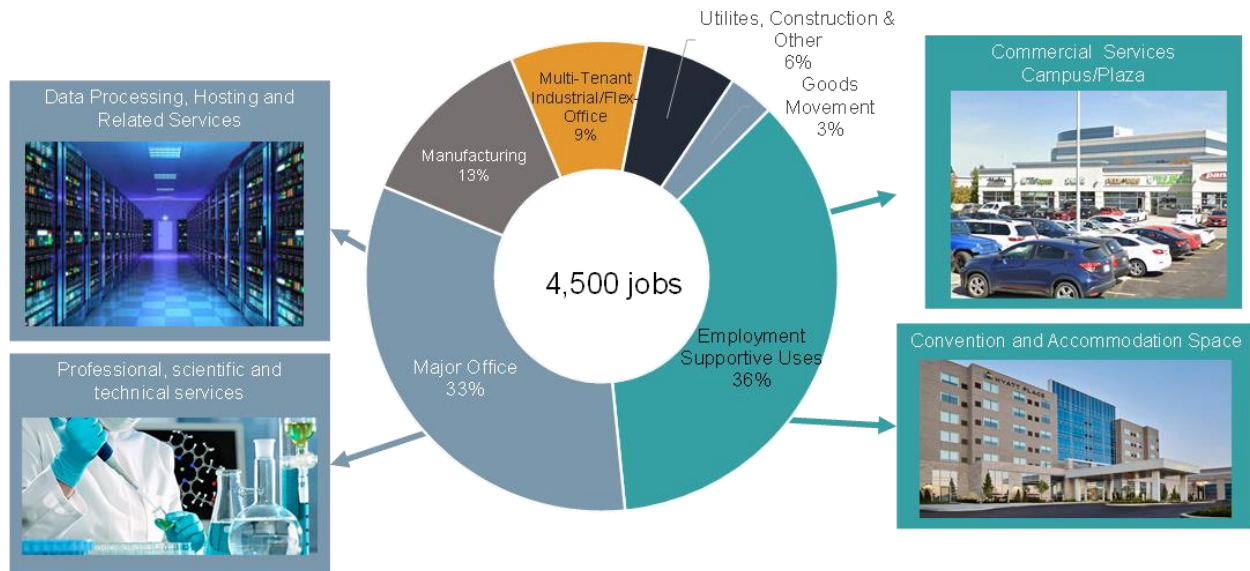
Figure 5-20b
Town of Caledon
Mississauga Road/Mayfield Road Employment Area
Existing Designated and Potential Settlement Area Boundary Expansion



This area is envisioned to complement and provide an integration with the Heritage Heights community in Brampton by providing a range of prestige and light industrial uses. There is an opportunity to consider high employment density uses, such as Major Office along Mayfield Road, as such uses would benefit from City of Brampton transit options and be well suited with the residential, mixed-use and office uses planned for Heritage Heights.



Figure 5-20c
Town of Caledon
Mississauga Road/Mayfield West Road Employment Area
Employment Growth Allocation by Type, 2021 to 2051



5.8 Employment Opportunities in Employment Areas

In accordance with the Region of Peel M.C.R., the Town of Caledon Employment Areas are anticipated to accommodate 54,500 jobs over the next 30 years across a broad range of employment sectors and land uses.

Building on the long-term vision provided for each of the Town's Employment Areas, Figures 5-21 and 5-22 summarize the employment growth forecast by sector for the Town's Employment Areas over the 2021 to 2051 planning horizon. Key findings include:

- Industrial uses in manufacturing buildings are anticipated to account for 27% (14,500 jobs) of employment growth in Employment Areas. Jobs within this sector are expected to be accommodated within established and emerging manufacturing clusters.
- Industrial uses in the Goods Movement sector are anticipated to account for 21% (11,400 jobs) of employment growth in Employment Areas. Employment growth within this sector is anticipated across a range of building types that currently exist today in Caledon, such as fulfillment centres, distribution centres,

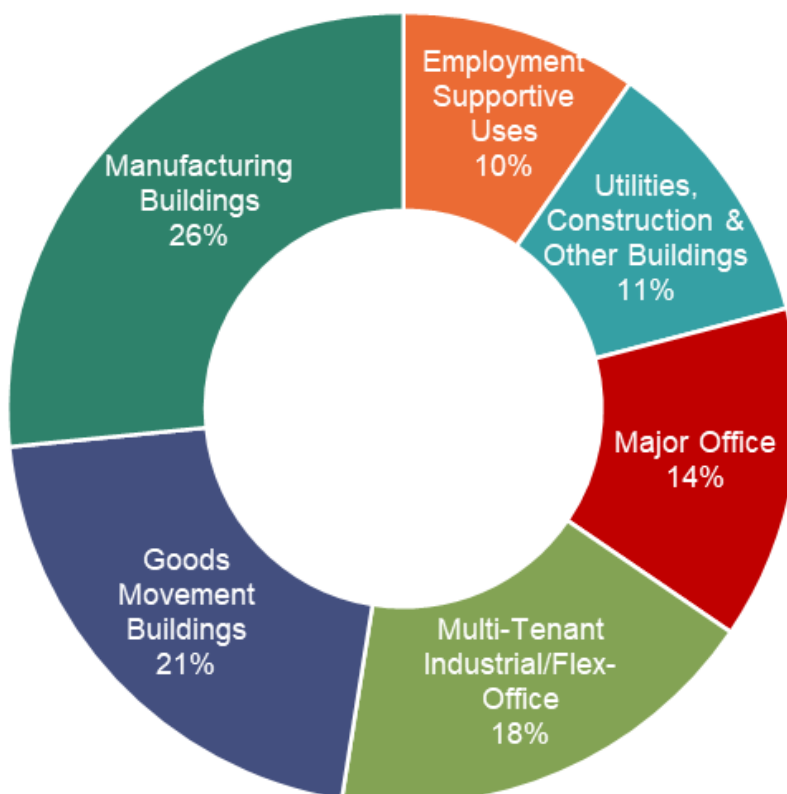


trucking terminals, as well as emerging built forms including integrated office and logistics, research and training facilities.

- Multi-tenant/flex industrial buildings are anticipated to represent 18% (9,800 jobs) of employment growth in Employment Areas. Employment growth within multi-tenant/flex industrial buildings is anticipated in small to medium-sized businesses across a range of office and industrial sectors.
- Major Office buildings are forecast to comprise 14% (7,400 jobs) of employment growth in Employment Areas, associated with head or regional corporate offices which require sites not appropriate for dense urban environments.
- Utilities, construction and other buildings are forecast to comprise 11% (6,100 jobs) of employment growth in Employment Areas. Industrial-type buildings within these sectors accommodate and support a range of businesses related to construction and trades that require office space for administration, industrial shops and outdoor storage.
- Lastly, employment-supportive uses are anticipated to account for 10% (5,300 jobs) of employment in Employment Areas. Employment-supportive uses largely represent commercial buildings that support the function of Employment Areas and include a range of uses such as restaurants, hotels, business-to-business outlets (i.e., tool and equipment rentals), fitness centres and convention centres.



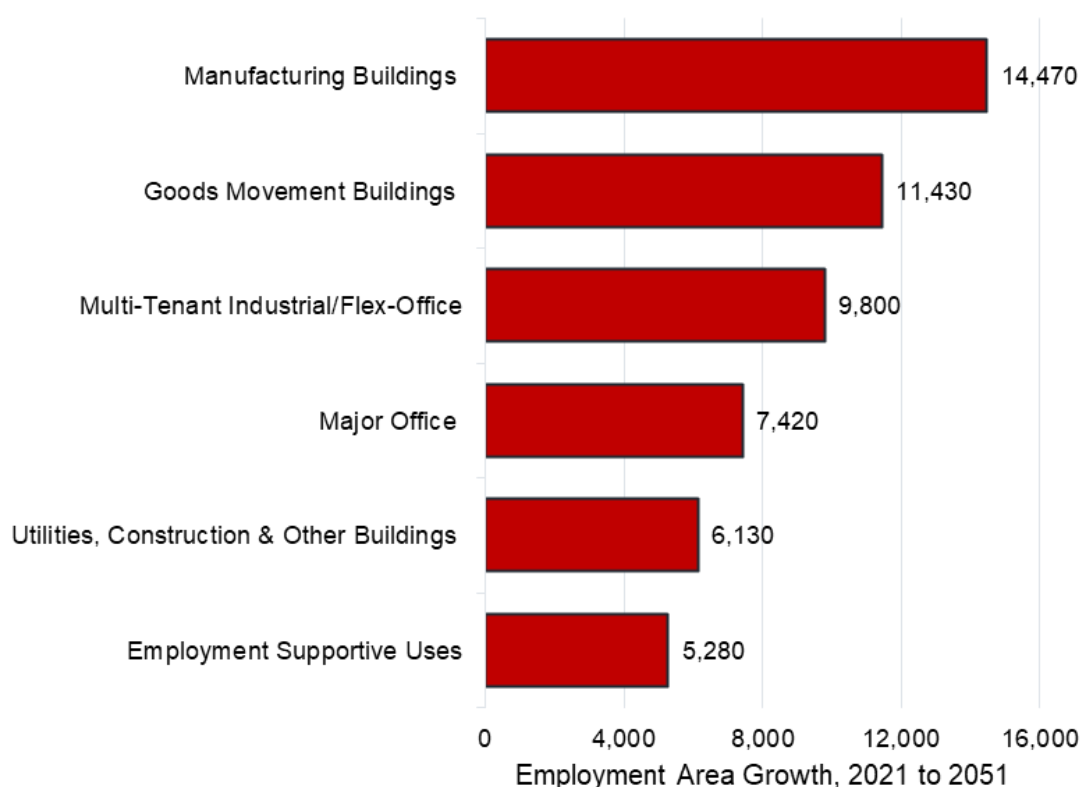
Figure 5-21
Town of Caledon
Share of Employment Area Growth by Type, 2021 to 2051



Source: Watson & Associates Economists Ltd.



Figure 5-22
Town of Caledon
Forecast Employment Area Growth by Type,
2021 to 2051



Source: Watson & Associates Economists Ltd. based on the Region of Peel M.C.R. 2051 forecasts.

5.9 Employment Area Designated Land Required

This section provides an overview of the Employment Area designations required to support the development of the Town's export-based employment sectors. Chapter 8 provides further recommendations to enhance the competitive position and maximize the diversity of employment within the Town's existing and planned Employment Areas.

Knowledge and Innovation Employment Areas are clusters of higher density employment uses, including office parks, and select institutional. Institutional uses, such as post-secondary facilities, university and government research stations/facilities, and research-based medical facilities are permitted if they are considered an anchor for



employment sectors and other supportive uses that are focused on technology and innovation. Knowledge and Innovation Employment Areas are anticipated to represent a small share of the Employment Area land base (less than 5%). The siting of Knowledge and Innovation Employment Areas is recommended in areas that provide connectivity to the broader community and offer synergies with Major Institutional uses (e.g., post-secondary campuses and health care precincts) in proximity to Employment Areas. Knowledge and Innovation Employment Areas will strive to attract uses that have a high-quality urban design.

In accordance with Region of Peel and provincial Employment Area policies, residential uses are not permitted. It is recommended that office and innovation employment environments that include residential uses should be directed to the Community Area in transit-supported areas, such as M.T.S.A.s. Major Institutional uses, including post-secondary campuses, should also be directed to Community Areas with access to existing or planned regional transit services and opportunities for on-site student housing.

Prestige Employment Areas are dynamic clusters of lighter industrial uses with a broader mix of employment uses including integrated office and industrial uses, Major Office and employment-supportive uses. These Employment Areas are dynamic environments that are planned to respond to the structural changes occurring in the economy, including supporting employment uses. These areas should offer strong connectivity to the broader community and should be situated at gateway locations in Employment Areas, with direct access and exposure to arterial roads. Prestige Employment Areas would limit the amount of logistics, warehousing and other associated transportation operations to prestigious developments which are typically integrated with office uses (e.g., distribution centre and corporate office). It is recommended that trucking terminals, with the primary function of facilitating trucking activity, be prohibited. Similar to Knowledge and Innovation Employment Areas, Prestige Employment Areas will strive to attract uses that have a high-quality urban design. It is recommended that institutional uses such as research facilities, industrial trade schools and training facilities be permitted in Prestige Employment Areas if they are directly integral to the function of the Employment Area and do not accommodate sensitive uses.

General Employment Areas are clusters of traditional employment uses that include manufacturing, construction, warehousing and transportation uses. To ensure that the



General Employment designation contributes towards the diversity of the Town's Employment Area base, General Employment Areas are recommended to include thresholds regarding the amount of warehousing and transportation uses permitted. Setting an appropriate threshold and identifying appropriate locations for warehousing and transportation uses could be explored through the Secondary Plan process, as well as through a Town-wide Trucking Strategy. Further, building on existing policies in the Town's O.P., the requirement of a Traffic Impact Study for proposed developments during the site plan review could be expanded to include areas that are designated as General Employment.

Stand-alone Major Office uses are recommended to be prohibited from the General Employment Area designation. Employment-supportive uses are recommended to be limited to ancillary uses only and uses requiring on-site storage (e.g., equipment rentals and heavy-duty mechanic services). Institutional uses such as industrial trade schools and training facilities are recommended to be permitted if they are directly related to the function of the Employment Area and do not accommodate sensitive uses.

Goods Movement District is a cluster of employment uses accommodating and supporting the movement of goods. These types of uses need larger separation distances from residential uses and require good access to arterial roads and 400-series/controlled access highway interchanges. The location and extent of the Goods Movement District are recommended to be informed by a Trucking Strategy that would identify transportation routes to support the flow of goods. It is recommended that the Goods Movement District would permit Major Office uses and employment-supportive uses, preferably at gateway locations that support the Goods Movement sector. Institutional uses such as research facilities, industrial trade schools and training facilities are recommended to be permitted if they are directly related to the function of the Employment Area (e.g., logistics research institutes, forklift training facilities and heavy-duty mechanic trade schools) and do not accommodate sensitive uses.

It is not the intention of this designation to limit other industrial uses that would be permitted in the General Employment Area designation, such as manufacturing and construction uses. The Goods Movement District designation is recommended to allow for a greater intensity of Goods Movement employment supported by safe and efficient trucking routes to the Employment Area.

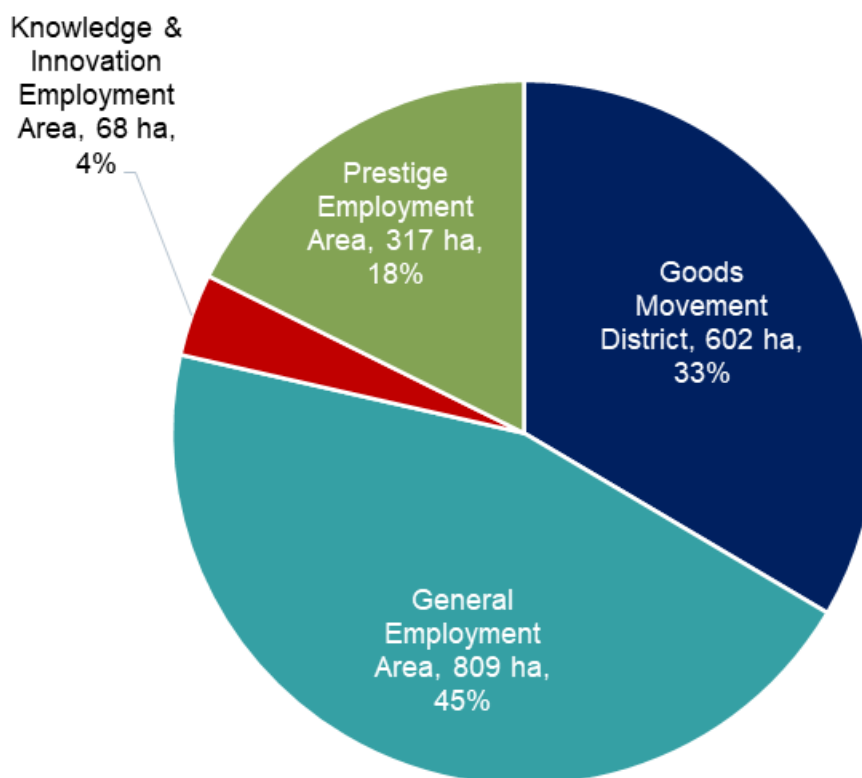


5.9.1 Designated Employment Area Requirements for Development on Vacant Designated Lands and in the Settlement Area Boundary Expansion

Figure 5-23 provides a summary of the land requirements for Employment Area Settlement Area Boundary Expansion (totalling 1,530 ha) and remaining vacant lands by proposed land-use designation. It is anticipated that half the designated lands will be required for General Industrial uses that will primarily accommodate manufacturing, utilities/construction, and to a lesser extent Goods Movement (approximately 45% of the land area) and employment-supportive uses. The proposed Goods Movement District land-use designation is anticipated to represent approximately 45% of the Employment Area Settlement Area Boundary Expansion. The Goods Movement District will accommodate over two-thirds of Goods Movement sector land requirements, as well as other General Employment uses. It is important to note while the primary function of the Goods Movement Sector to accommodate the Goods Movement sector requirements, it is also anticipated that the Goods Movement District will also accommodate at least 3,300 jobs from other sectors. Prestige Employment Areas are anticipated to require approximately 18% of the designated Employment Area, comprised of Major Office, multi-tenant/flex-industrial, employment-supportive uses, as well as a small portion of other industrial uses. Knowledge & Innovation Employment Areas are anticipated to represent 4% of the land area with a focus on accommodating Major Office, employment-supportive uses and a portion of multi-tenant/flex industrial buildings. Further details regarding these assumptions, including land area, employment and density, are provided in Appendix B.



Figure 5-23
Town of Caledon
Settlement Area Boundary Expansion Employment Areas
Forecast Employment Demand by Designation



Source: Watson & Associates Economists Ltd.

5.10 Observations

The Town faces a number of opportunities and challenges with respect to the management and growth of its existing and future Employment Areas, in light of the evolving structural changes in the economy and disruptive factors which continue to influence the nature of development in industrial areas. One of these challenges relates to macro-economic trends over which the Town has limited control. This includes the relative strength of the global economy, international trade policy and the competitiveness of the Canadian economic base relative to other established and emerging global markets.



In contrast to the above, Caledon has considerable control and ability to position itself in a positive manner when considering the Town's regional competitive ranking. This requires the Town to continue marketing itself as a hub for innovation, equipped with the human capital that is required to encourage on-going innovation, entrepreneurship, small business development and local investment retention.

A major factor for the future competitiveness of the Town's economic base relates to the structure, quality and "readiness" of its employment lands. As previously discussed, Caledon has been allocated a significant amount of employment growth by the Region of Peel through its M.C.R. process. This will require a considerable amount of new Employment Area lands to be designated, planned and serviced in a timely manner in accordance with near-term and longer-term industrial and commercial development priorities.

Currently, the Town has a very limited amount of Employment Area lands available for development that are fully serviced and available for development today, or over a short-term time frame (i.e., one to three years). It is anticipated that the Town will completely deplete its remaining supply of serviced Employment Area lands within the next five years if new Employment Areas are not added to the Town's Employment Area land supply. Efforts by the Town should focus on expediting the serviced supply of new Employment Area lands with the Region of Peel. The Town is currently undertaking an industrial business case study which ensure the protection of land supply for future investment/development in key industrial sectors identified in the Economic Development Strategy.^[80] Sectors identified in the Economic Development Strategy include: advanced manufacturing, agri-food processing/science and knowledge based sectors. As discussed in the Economic Development Strategy report, the Town needs to control the acquisition, planning development of lands that are being developed for the purpose of logistics/warehouse or Goods Movement sector. The Goods Movement Sector has absorbed and significantly depleted the supply of land available for the key sectors that the Town of Caledon would like to attract.

Working with the Region of Peel, the Town should proactively plan for new Employment Area lands to the year 2051, as identified through the Peel Region M.C.R. The Region's M.C.R. process, which includes a detailed Employment Area land needs

^[80] An Economic Strategy for the Town of Caledon, 2020-2030, prepared by MDB Insights, February 2020



assessment, occurs every 10 years. According to the Growth Plan, 2019, municipalities may plan for the long-term protection of Employment Areas provided lands are not designated beyond the horizon of the Plan (i.e., 2051).^[81] Accordingly, it is recommended that the Town identify lands that should be reserved as future urban Employment Areas beyond the 2051 planning horizon which are strategically located in proximity to planned Employment Areas, major transportation corridors and/or Goods Movement infrastructure. This would provide Town direction regarding the protection of future lands for Employment Area development where the need for such lands cannot be justified at this time through the Region of Peel M.C.R. process to the year 2051. Chapter 8 provides further policy recommendations in this regard.

As discussed, a key to Caledon's long-term success relates to its ability to anticipate, plan for, and balance employment growth within its Employment Areas across a broad range of employment sectors and land uses. A key objective of this study is to provide a broad vision and clear "road map" with the respect to the development of the Town's Employment Areas which builds on Caledon's local strengths and capitalizes on anticipated local industrial growth opportunities identified over the long term. Building on the insights provided herein, Chapter 8 provides a series of planning and economic development policy recommendations with respect to the development of the Town's Employment Areas.

^[81] Growth Plan, 2019, p. 8.



Chapter 6

Population-Related Employment and Major Office Opportunities in Urban Community Areas



6. Population-Related Employment and Major Office Opportunities in Urban Community Areas

Population-Related Employment (P.R.E.) uses in Community Areas represent an important component in building complete communities by providing access to retail goods and services to residents, as well as a range of employment opportunities for residents. This chapter provides a discussion on opportunities for urban non-residential development within the Town of Caledon's Community Areas. Further, a summary of the land requirements for P.R.E. lands (retail, office, institution and mixed-use) and a long-term vision for planning for P.R.E. uses is provided.

This chapter also discusses Major Office Employment (M.O.E.) opportunities in the Town's Community Areas. While M.O.E. currently represents a small base of employment in the Town, this sector is anticipated to accommodate approximately 2,000 jobs in the Urban Community Area by 2051. As discussed in this chapter, the Town's M.T.S.A.s are expected to anchor future M.O.E. growth in the Town's Community Areas.

6.1 Introduction

6.1.1 *Planning for Commercial Employment in Community Areas*

In accordance with the provincial L.N.A. methodology guidelines, Community Areas are defined as urban lands where the vast majority of housing required to accommodate forecast population will be located, as well as the majority of population-related jobs, most office jobs and some Employment Lands Employment jobs.^[82] In accordance with the provincial L.N.A. methodology guidelines, Community Areas represent Urban Settlement Areas that are fully serviced (water and wastewater servicing). Within the Town of Caledon, the following settlement areas are defined as Community Areas:

- Bolton;
- Mayfield West; and
- Caledon East.

^[82] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). August 2020.



The Town of Caledon O.P. (2018) identifies Bolton, Mayfield West and Caledon East as Rural Service Centres. These settlement areas are planned as compact, well-integrated, rural towns that provide the widest range of goods and services to residents within these centres as well as residents throughout the larger geographic area of the Town.^[83]

The Growth Plan, 2019 requires that municipalities plan for two major components within Community Areas: the Built-up Area (B.U.A.) and the Designated Greenfield Area (D.G.A.). The settlement areas of Bolton, Mayfield West and Caledon East have a delineated B.U.A. and D.G.A. Caledon Village has a B.U.A., but does not have a D.G.A. Within the B.U.A., municipalities may have strategic growth areas identified by the Province and by the upper-tier municipality, including M.T.S.A.s and Urban Growth Centres (U.G.C.s). Municipalities may also identify further strategic growth areas to direct intensification. Caledon has two M.T.S.A.s identified by the Region of Peel: the Mayfield West Transit Hub M.T.S.A. and the Caledon GO Transit M.T.S.A. It should be noted that R.O.P.A. 30 brought agricultural lands into the settlement boundary which also make up part of the Caledon GO M.T.S.A.

The provincial L.N.A. does not provide specific requirements for the planning of Population-Related Employment uses in Community Areas. The general policy thrust of the Growth Plan, 2019, however, is to plan for “complete communities” with a focus on supporting mixed uses which integrate residential and non-residential uses where appropriate. A key distinction with planning for employment in Community Areas as opposed to Employment Areas is that employment is highly integrated within Community Areas, while Employment Areas provide the opportunity to buffer employment uses that have a lower degree of compatibility with the rest of the settlement area.

6.1.2 What is Population-Related Employment?

Population-Related Employment (P.R.E.) is accommodated throughout the Town’s Community Areas, and to a lesser extent, through the Town’s Employment Areas. P.R.E. represents the majority of employment accommodated in the Community Areas. P.R.E. typically includes the following employment sectors:

- Personal services, retail and tourism;

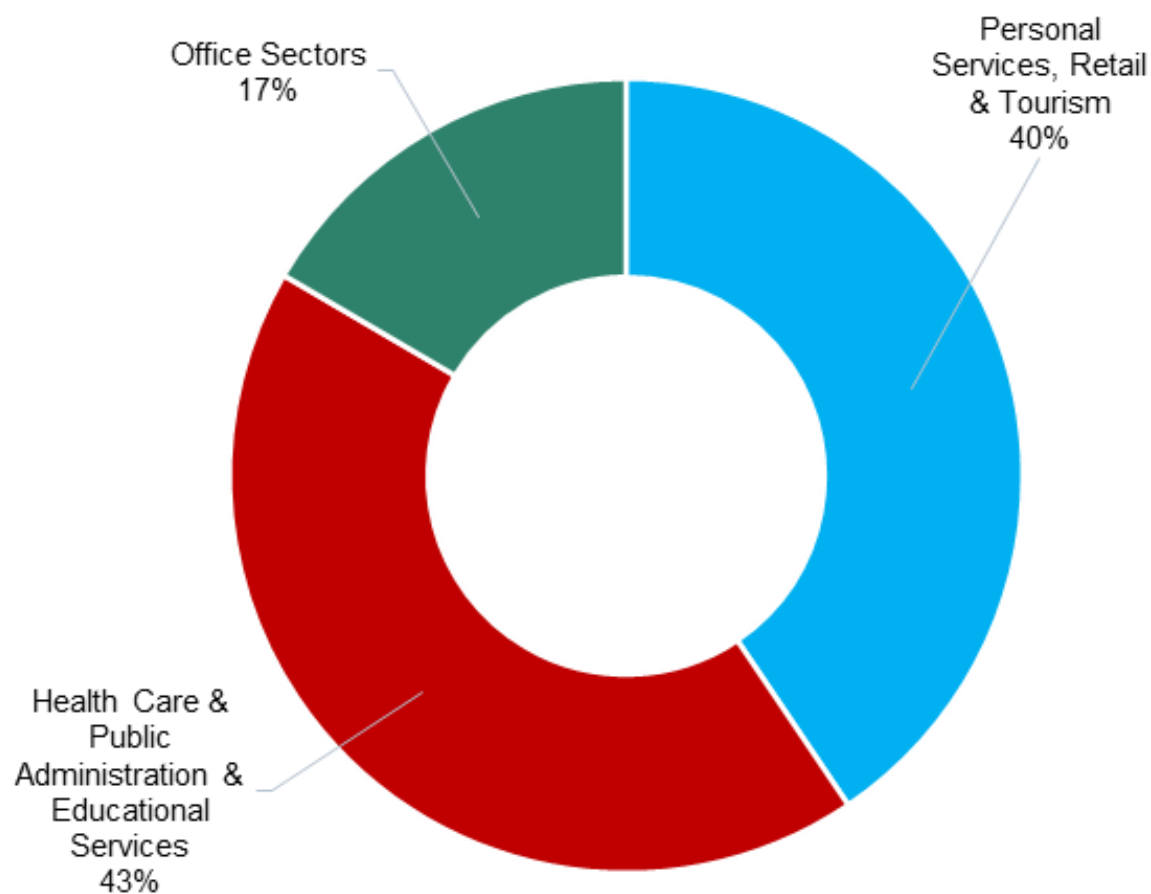
^[83] Town of Caledon Official Plan (2018), policy 5.10.3.2, p. 5-89.



- Health care, public administration and educational services; and
- Office sectors.

Figure 6-1 provides a summary of P.R.E. by sector in Caledon as of 2021. As summarized, approximately 43% of P.R.E. is comprised of health care, public administration and health care service, followed by 40% in personal services, retail and tourism and 17% in the office sectors.

Figure 6-1
Town of Caledon
Urban Community Areas
Population-Related Employment Sectors, 2021



Source: Watson & Associates Economists Ltd. Excludes P.R.E. in Employment Areas and Rural Area.



P.R.E. opportunities are largely driven by population growth; however, P.R.E. opportunities are also influenced by the location and role of the municipality within a regional context, which varies across the G.G.H. As previously discussed in Chapter 4, the P.R.E. base in Caledon currently serves the local population, while residents are dependent on other municipalities for higher-order P.R.E. uses (e.g., hospitals, regional shopping centres and post-secondary institutions). The Town of Caledon has approximately 1 P.R.E. job per 10 residents, which is considered low and suggests that the Town has a small P.R.E. base relative to its population base.

Population-Related Employment Lands

For the purposes of this report, Population-Related Employment (P.R.E.) lands refer to lands with a mixed-use, commercial, or institutional land-use designation. P.R.E. lands (also known as commercial and institutional lands) in Community Areas accommodate a broad range of P.R.E. sectors. A proportion of neighbourhood-serving P.R.E. uses, such as home businesses, schools, and neighbourhood retail stores, can locate on residentially designated lands, subject to planning policies which address their site-specific suitability. The majority of P.R.E. jobs, however, are accommodated in residential mixed-use, commercial, and institutional designations.

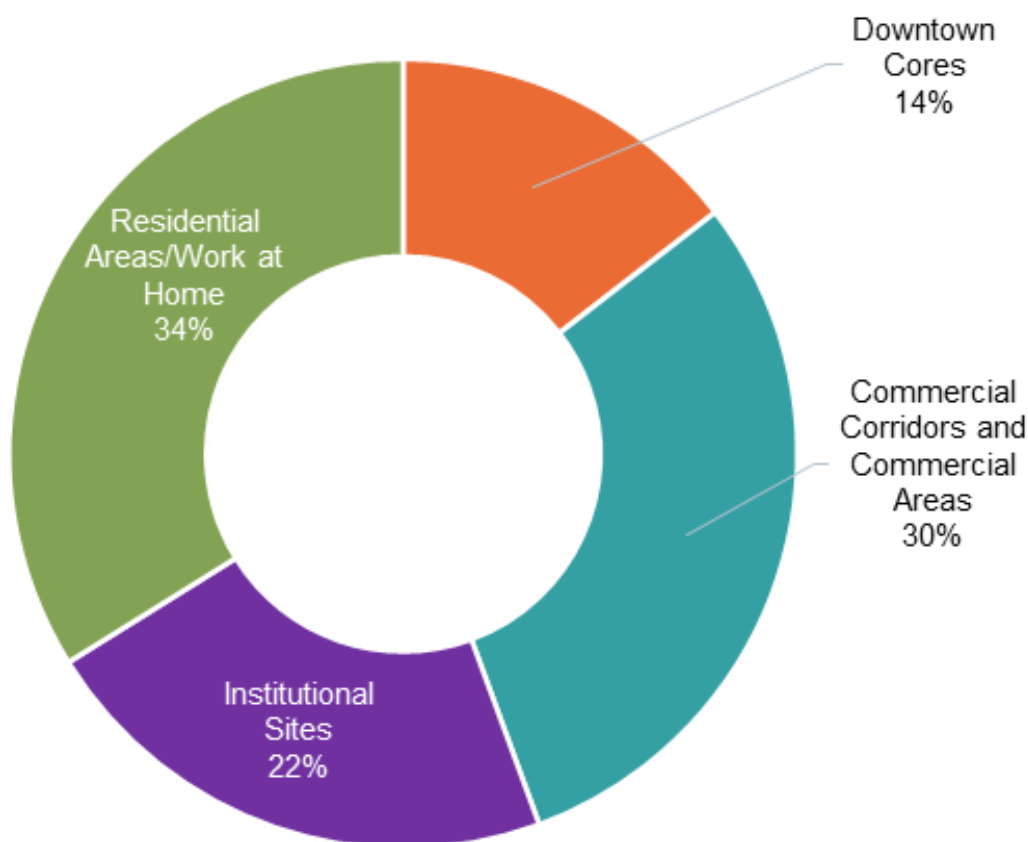
Figure 6-2 provides a summary of the distribution of employment by location in the Town's Community Areas. In general, these forms of P.R.E. are typically located in the areas discussed below.

- Commercial corridors and commercial areas, where the majority of the Town's larger retail uses are accommodated, represent 30% of the P.R.E. base in the Community Areas. These areas also accommodate office and small-scale institutional uses (daycares and medical/dental offices).
- Residential areas and work at home employment represent over a third of the employment in the Community Areas.
- Institutional sites, including schools, daycares, medical facilities, places of worship, public facilities and administration accommodate 22% of the Town's P.R.E. in the Community Areas. Major Institutional uses such as elementary and secondary schools and the Town's public facilities and administration offices comprise more than half of the employment on institutional sites.
- Downtown cores, which include downtown Bolton and the traditional main street of Caledon East, represent a small share of the employment in the Community



Areas at 14%. The downtown cores have the largest concentration of the Town's office base.

Figure 6-2
Town of Caledon
Urban Community Area
Population-Related Employment by Location, 2021



Source: Watson & Associates Economists Ltd. Excludes P.R.E. in Employment Areas and Rural Area.

6.1.3 What is Major Office Employment?

Major Office Employment (M.O.E.) includes employment in office buildings 2,000 sq.m (22,000 sq.ft.) or greater. As discussed in Chapter 4, M.O.E. represents a very small portion of the Town's existing employment base (200 jobs) and is typically accommodated in mid-rise office buildings in Bolton (e.g., Goodfellow Professional Building). The Growth Plan, 2019 directs M.O.E. to U.G.C.s, M.T.S.A.s or other



strategic growth areas with existing or planned frequent transit service.^[84] Employment Areas, however, also provide opportunities to accommodate M.O.E. within business parks and corporate office campuses, where such uses cannot be easily accommodated within more dense mixed-use urban settings. Increasingly, M.O.E. or office uses are integrated within buildings or integrated on sites with other industrial-type uses in Employment Areas. Planning for M.O.E. in the Town of Caledon over the near term should be focused in Employment Areas and Downtown Areas. Over the longer term, the Town's M.T.S.A.s also represent an opportunity to accommodate additional M.O.E.

6.2 Existing Caledon Population-Related Lands O.P. Policy Framework

6.2.1 *Population-Related Employment (P.R.E.) Designations*

The Town has the following designations for P.R.E. uses in the Community Areas as identified in the Town's O.P.:

- Highway Commercial;
- Local Commercial;
- Community Shopping Centre Commercial; and
- Institutional.

In addition to the above commercial and institutional designations, the Town's O.P. has the following site-specific commercial and institutional designations:

- Commercial – Medical Centre;
- Commercial – Financial Office; and
- Academic/Research Campus.

Further, the Town has a series of Secondary Plans that direct the type and form of non-residential development.

The Town should also consider a mixed-use designation for new communities and arterial commercial areas targeted for transformation. The Town should consider the

^[84] Growth Plan, 2019, policy 2.2.5.2, p. 19.



recommendation provided in the Town of Caledon Queen Street Corridor, Bolton Study Report (March 25, 2019) of exploring opportunities for higher density commercial and higher density residential activity along Highway 50 between McEwan Drive and George Bolton Parkway to support a new commercial core.^[85]

In planning for commercial uses, policies for commercial designations should focus on reducing the dependency on automotive trips and design for public transit and active transportation, including accommodating bus lay-by lanes, covered walkways, dedicated bike lanes and bike rack/storage areas in commercial areas. It is noted by Town planning staff that current parking requirements in zoning have caused loss of commercial development in urban cores.

Provided below is a brief summary of the Town of Caledon's current O.P. designations which accommodate P.R.E. uses in Community Areas.

6.2.1.1 Highway Commercial

Highway Commercial includes commercial areas that provide for a wide range of commercial service and retail facilities. These areas are required to be located at key points along major highways and arterials for accessibility and visibility. Highway Commercial uses include tourist accommodations, automotive services, recreation facilities, restaurants, and other similar uses. Within the Rural Service Centres, this designation includes the Bolton Highway 50 Commercial Area. This designation is also provided in the Industrial/Commercial Service Centres of Tullamore, Victoria and Sandhill.^[86]

6.2.1.2 General Commercial

General Commercial includes the core areas (e.g., downtown Bolton and Caledon East) and other specific sites within the Rural Service Centres. General Commercial permits a wide range of retail and service activities, including accommodation, apparel, automotive, clinic, convenience store, department store, furniture, grocery, hardware, office, personal service, pharmacy, professional/office commercial services, restaurant

^[85] Refer to Chapter 8, section 8.5.3.

^[86] Town of Caledon Official Plan (2018), policy 5.4.4, p. 5-41.



and other similar uses. This designation is also supported by general policies and design guidelines to protect the character and function of the area.^[87]

6.2.1.3 Community Shopping Centre Commercial

Community Shopping Centre Commercial applies to large sites or districts in the Rural Service Centres where a wide range of retail, service, and office commercial uses are concentrated and form an integrated shopping complex. Community Shopping Centre Commercial permits a wide range of retail, service, and office commercial uses, similar to General Commercial uses. Development within the Community Shopping Centre Commercial area is encouraged to include a community service component, such as day care, library, theatre or similar service facilities. Commercial uses such as motor vehicle sales, rental or leasing agencies, accommodation, and ancillary residential uses, are discouraged from locating in areas with this designation. Lands with this designation are subject to general design guidelines to support function of the commercial uses.^[88]

This designation accommodates most of the current commercial base in Caledon East, Bolton and Mayfield West.

6.2.1.4 Local Commercial

Local Commercial includes small-scale commercial sites in residential areas within Rural Service Centres that provide a limited range of goods and services. Local Commercial Uses consist of a limited range of commercial uses that are designed to serve the day-to-day needs of the surrounding neighbourhood. The permitted commercial uses include convenience stores, dry cleaners and beauty/barber shops. Ancillary residential uses are discouraged on lands with this designation.^[89]

6.2.1.5 Institutional

The Town's institutional designation accommodates schools, hospitals, medical offices, government buildings, libraries, senior citizens homes, day care centres, cemeteries and places of worship. It is noted in the O.P. that existing Institutional uses not designated on Schedule A, Land Use Plan due to scale are to be recognized as

^[87] Ibid.

^[88] Town of Caledon Official Plan (2018), policy 5.4.4, p. 5-41.

^[89] Ibid., policy 5.4.7, p. 5-42.



conforming uses. Further, Major Institutional development is encouraged in the M.T.S.A.s and areas with existing frequent transit service or existing or planned higher order transit service.^[90]

6.2.1.6 Commercial – Medical Centre

The Commercial – Medical Centre designation accommodates a clinic as its core use with accessory uses, which allows for some limited accessory uses including a dining-room restaurant, a pharmacy and a medical laboratory. The Medical Centre designation is intended to complement the function of the designated Bolton Community Shopping Centre Commercial Area and Bolton Highway 50 Commercial Area.^[91]

6.2.1.7 Commercial – Financial Office

The Commercial – Financial Office designation permits a bank as its core use and may include accessory office uses directly related to the operation of the principal use.^[92]

6.2.1.8 Academic/Research Campus

As previously discussed in Chapter 5, the Town has designated lands in Mayfield West as Academic/Research Campus which are intended to accommodate a post-secondary education institution such as a community college or university. This designation is to be reviewed regularly (every five years) based on the opportunity to accommodate a major institution (college or university) and may convert to Prestige Industrial Use without amendment if there is little prospect of a major institution and the conversion is supported by council direction.^[93]

This designation is considered as part of the Community Area employment opportunity given the potential to accommodate significant P.R.E. growth.

6.2.2 General Commercial Policies

The Town's O.P. includes general commercial policies to direct and manage commercial growth. Provided below is a summary of key policies.

^[90] Ibid., p. 5-55.

^[91] Ibid., policy 5.4.10, p. 5-44.

^[92] Town of Caledon Official Plan (2018), policy 5.4.11, p. 5-44.

^[93] Ibid., policy 7.12.12.4, p. 7-193.



Commercial Impact Study

A Commercial Impact Study is required for the lifting of holding provisions on lands zoned Holding Zone – Commercial and for the development of a major new commercial designation proposed in any settlement area.^[94] The policy provides a list of requirements to be considered in the Commercial Impact Study.

As discussed later in Chapter 8, it is recommended that the Town consider expanding this policy to assist planning staff in reviewing development applications that seek to change or expand the provisions of an already designated commercial site to accommodate mixed-use, including residential uses. This study would provide an assessment of the commercial need, the development impact on the commercial structure and how the mixed-use development would be best integrated in the existing community. The objective is to balance the need to accommodate vibrant mixed-used developments while protecting the Town's commercial structure.

Commercial Design Guidelines

The Town's O.P. provides policies to protect the architectural heritage of the Town's urban areas. The Town's urban design guidelines provide further direction on design that supports the form and function of commercial sites. According to the Town of Caledon O.P., any buildings, structures or lands which are within a designated commercial area, or proposed for commercial use, may be reviewed by Heritage Caledon for their historic, architectural, aesthetic or scenic interest.^[95]

6.3 Population-Related Employment and Major Office Opportunities in the Community Areas

6.3.1 Community Area Growth Forecast to 2051

The Community Areas are anticipated to accommodate 39,000 jobs over the 2021 to 2051 period. As previously discussed in Chapter 4, the Community Areas are anticipated to accommodate 41% of the Town's employment growth to 2051. The Region of Peel has identified approximately 19,000 Community Area jobs to be

^[94] Ibid., 5.4.3.11, p. 5-38.

^[95] Town of Caledon Official Plan (2018), policy 5.4.3.13, p. 5-39.



accommodated on Community Area Settlement Area Boundary Expansion lands in Caledon.

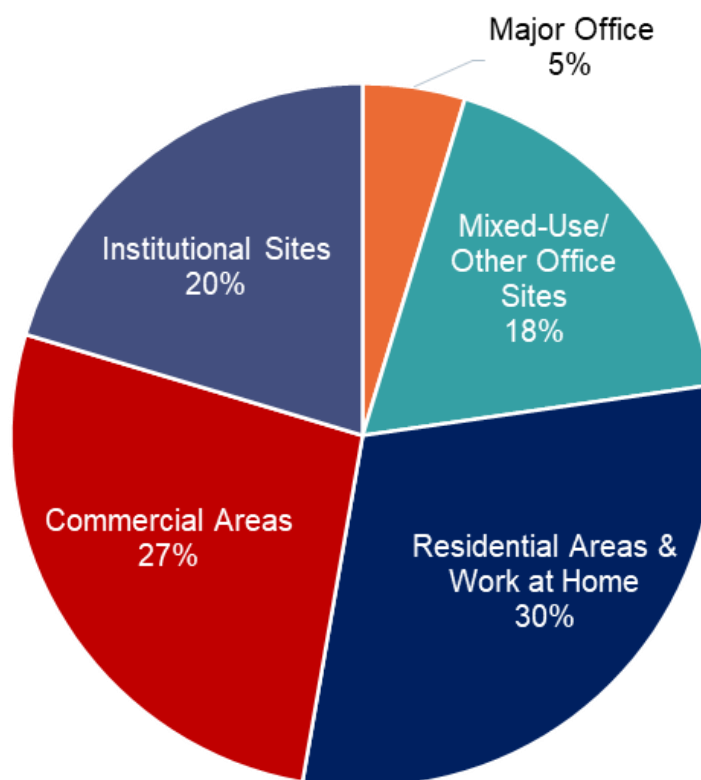
Figure 6-3 provides a summary of the anticipated Community Area employment by type in the Town of Caledon. Key findings are provided below:

- Employment in residential areas and work at home is anticipated to accommodate 30% of Community Area employment.
- Commercial areas that accommodate a range of retail and commercial services and some institutional service uses are anticipated to accommodate 27% of Community Area employment. Employment in the commercial areas will require an adequate supply of designated lands at strategic locations with good visibility and access throughout the Town's Community Areas.
- Collectivity, Major Office and mixed-use/other office uses are anticipated to accommodate 23% of Community Area employment. Planning for office employment will require consideration of locations that have access to planned transit services.
- Institutional sites such as schools, medical facilities, public facilities and places of worship are anticipated to accommodate 20% of Community Area employment.

Over the forecast period, the Population-Related Employment (P.R.E.) ratio (number of residents per 1 P.R.E. job) is anticipated to decrease from 10 residents per 1 P.R.E. job in 2021 to 7 residents per 1 P.R.E. by 2051.



Figure 6-3
Town of Caledon
Community Area Forecast by Type, 2021 to 2051



Source: Watson & Associates Economists Ltd. based on the Region of Peel M.C.R. 2051 Forecast.

Further details on the employment forecast by type is provided in Appendix D.

6.4 Town of Caledon Commercial Structure and Existing Conditions

This section provides a brief overview of the commercial structure and existing conditions of the commercial areas in the Town of Caledon as of 2020.

6.4.1 *Total Purpose-Built Retail and Commercial Service Space by Urban Settlement Area*

It is estimated that the Town's commercial areas accommodate approximately 179,500 sq.m (1.9 million sq.ft.) of gross leasable area retail and commercial service space as of



2020. The Town has a commercial buildings vacancy rate of approximately 3% which is considered below a vacancy rate that supports a healthy and balanced retail market.^[96] Typically, a retail vacancy rate of between 5% and 8% is considered a balanced market. The Town of Caledon has approximately 2.3 sq.m (25 sq.ft.) of retail and commercial space per capita as of 2020.

Figure 6-4 provides a summary of the 2020 Town-wide retail and commercial service base by retail category. Key highlights are provided below.

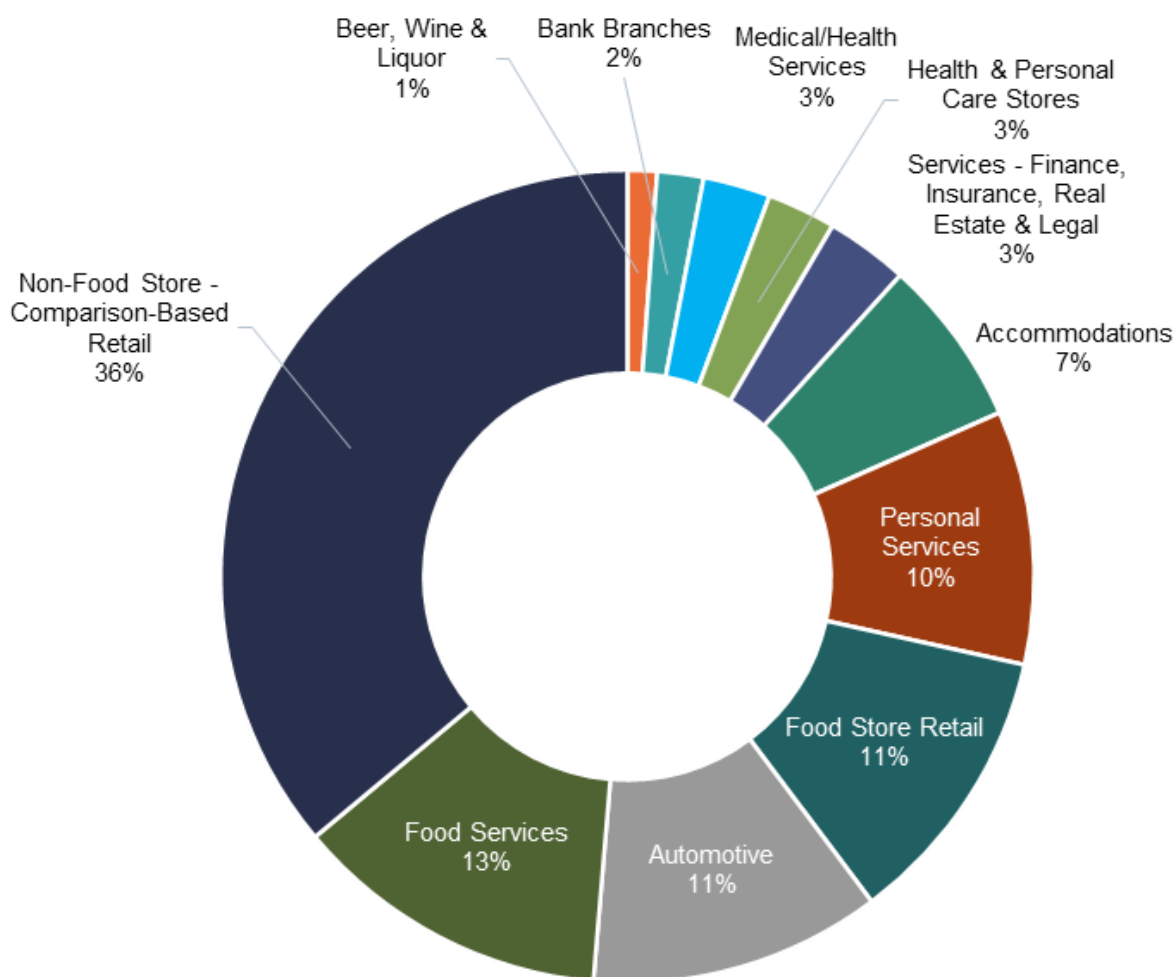
- Approximately 36% of the retail and commercial service base is comprised of building space that accommodates non-food-store retail; retail that is comparison based. Retail in this category includes big-box retailers, such as Walmart, Home Depot, SportChek, Staples and Winners. This retail category is most impacted by growth in e-commerce. Over the forecast, it is anticipated that this category will represent a smaller share of the Town's retail and commercial service base.
- Food services, including fast-food restaurants, cafes and other restaurants, represent 13% of the Town's commercial building space and are anticipated to represent a large share of the Town's growing retail and commercial building space needs. The food service sector will continue to evolve with opportunities to expand its reach with digital platforms (such as uberEats).
- Automotive uses, such as gas stations, car washes, automotive service stations and automotive dealerships, represent 11% of the retail and commercial building space, which is considered high in the G.T.H.A. but is reflective of numerous service stations throughout the Town serving motorists along area highways. Over the forecast period, it is anticipated that the share of building space in this category will decline given policies that discourage commercial development in the Rural Area.
- Food store uses represents 11% of the Town's retail and commercial building space. The share of retail and commercial building space associated with this retail category is anticipated to increase over the long-term forecast period. While food store retailers are improving e-commerce services, "bricks and mortar" is increasing being used to support e-commerce fulfillment.
- The remaining sectors are service oriented and represent just under a third of the Town's retail and commercial service base. Over the forecast period, this

^[96] Based on fieldwork conducted by Watson & Associates Economists Ltd. in March 2020.



category is anticipated to experience a significant increase in growth supported by an aging population and an increase in new families to the area. This sector is anticipated to be less impacted by e-commerce relative to many of the Town's other retail and commercial sub-sectors.

Figure 6-4
Town of Caledon
Retail and Commercial Service
Building Space (Gross Leasable Area) by Type, 2020



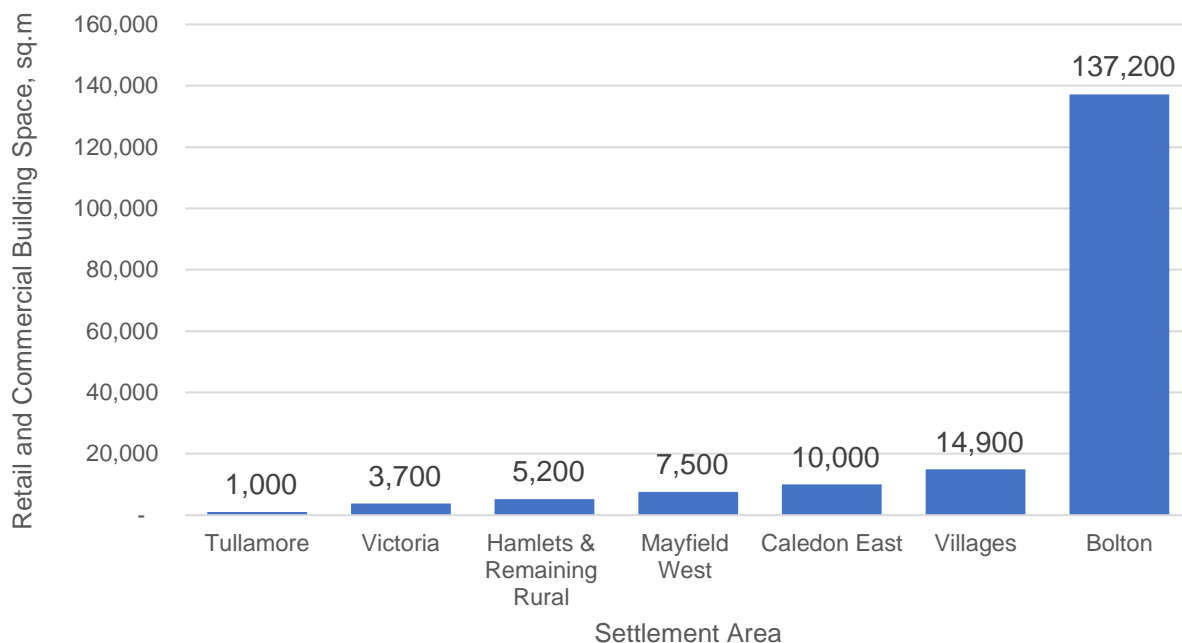
Source: Watson & Associates Economists Ltd., 2020.

In comparison, retail and commercial service space in the Town of Caledon is considered low compared to other communities in the G.T.H.A., reflecting a commercial



base primarily serving a local population base. Provided below in Figure 6-5 is a summary of the Town's retail and commercial service building space by settlement area. Most of the Town's retail and commercial space is located in the Bolton settlement area totalling 137,200 sq.m (approximately 1.5 million sq.ft.) in Gross Leasable Area. The Rural Service Centres collectively accommodate 91% of the Town's retail and commercial service building space.

Figure 6-5
Town of Caledon
Retail and Commercial Service
Building Space (Gross Leasable Area) by Area (sq.m) as of March 2020



Source: Watson & Associates Economists Ltd., 2020.

The Rural Service Centres accommodate 3.1 sq.m (33 sq.ft.) per capita of retail and commercial service space as of 2020.^[97] Mayfield West accommodates a very low per capita ratio of 0.5 sq.m (5 sq.ft.), while Bolton accommodates a ratio of 4.6 sq.m (50 sq.ft.) per capita of retail and commercial space. Caledon East accommodates 1.9 sq.m (20 sq.ft.) per capita of retail and commercial space.

^[97] Town-wide per capita ratio is 2.3 sq.m (25 sq.ft.) as previously discussed.



Appendix D provides further details on the Town's built retail and commercial service Gross Leasable Area. space.

6.4.2 Commercial Areas in Rural Service Centres

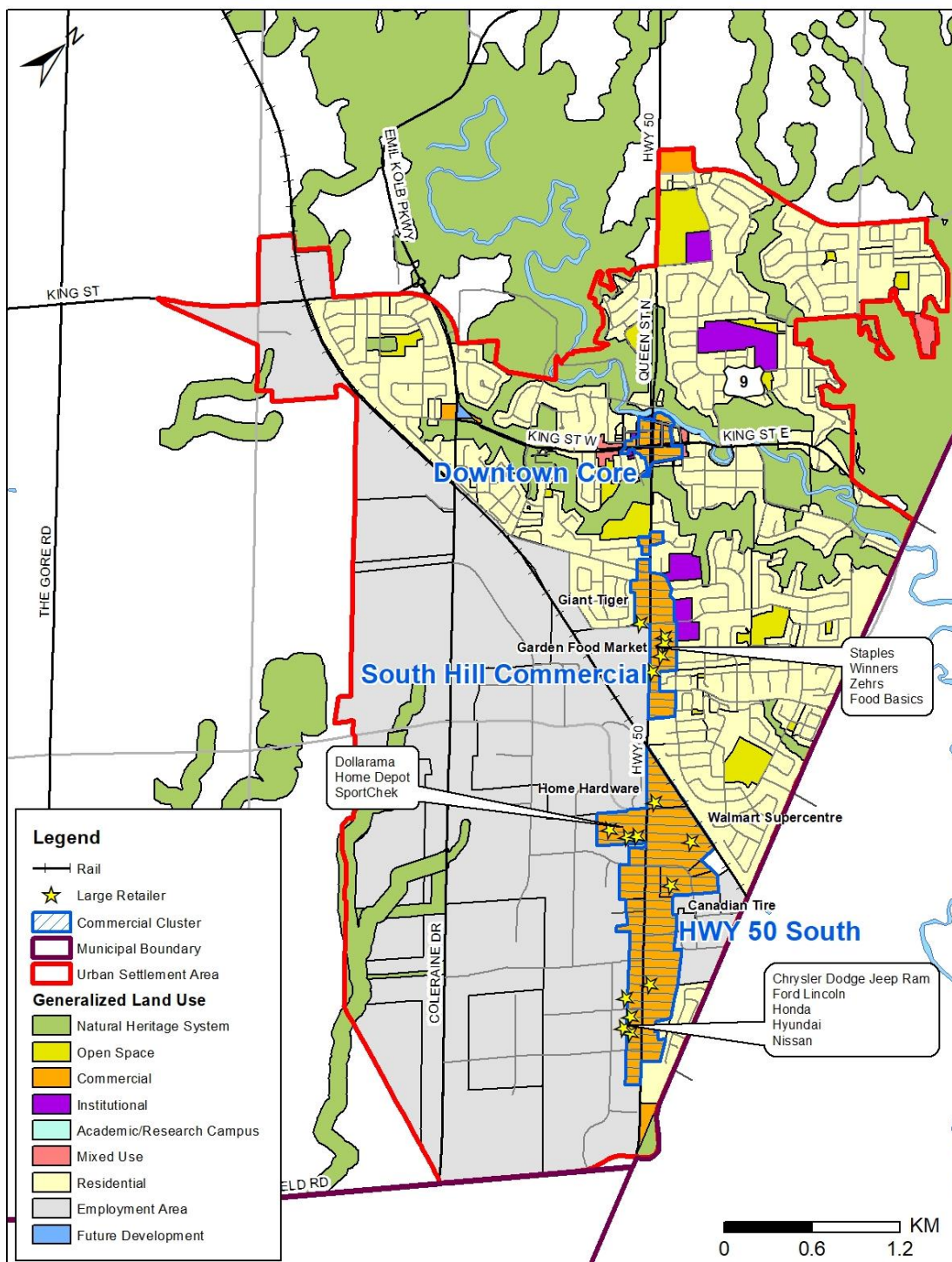
Bolton Rural Service Centre

Figure 6-6 geographically illustrates the location of the commercial areas in Bolton. In total, there are three commercial areas in Bolton:

- **Downtown Core** includes approximately 12,200 sq.m (131,000 sq.ft.) of retail and commercial building space. The downtown core has the largest selection of independent retailers in Bolton, primarily oriented towards service uses. The Bolton Downtown Core is identified as a Heritage District in the Town's O.P. A key commercial anchor in the core includes the Royal Courts Complex which includes a large concentration of office uses.
- **Bolton South Hill Commercial** includes approximately 35,800 sq.m (385,000 sq.ft.) of retail and commercial building space. The commercial area is anchored by three grocery stores and the Bolton Mall.
- **Bolton Highway 50 Commercial Area** includes approximately 89,200 sq.m (960,000 sq.ft.) of retail and commercial building space. The commercial area is anchored by big-box retailers, including Walmart, Home Depot and Canadian Tire. The commercial area includes other large retail uses such as a hotel and automotive dealerships.



Figure 6-6
Town of Caledon
Bolton Settlement Area Commercial Areas

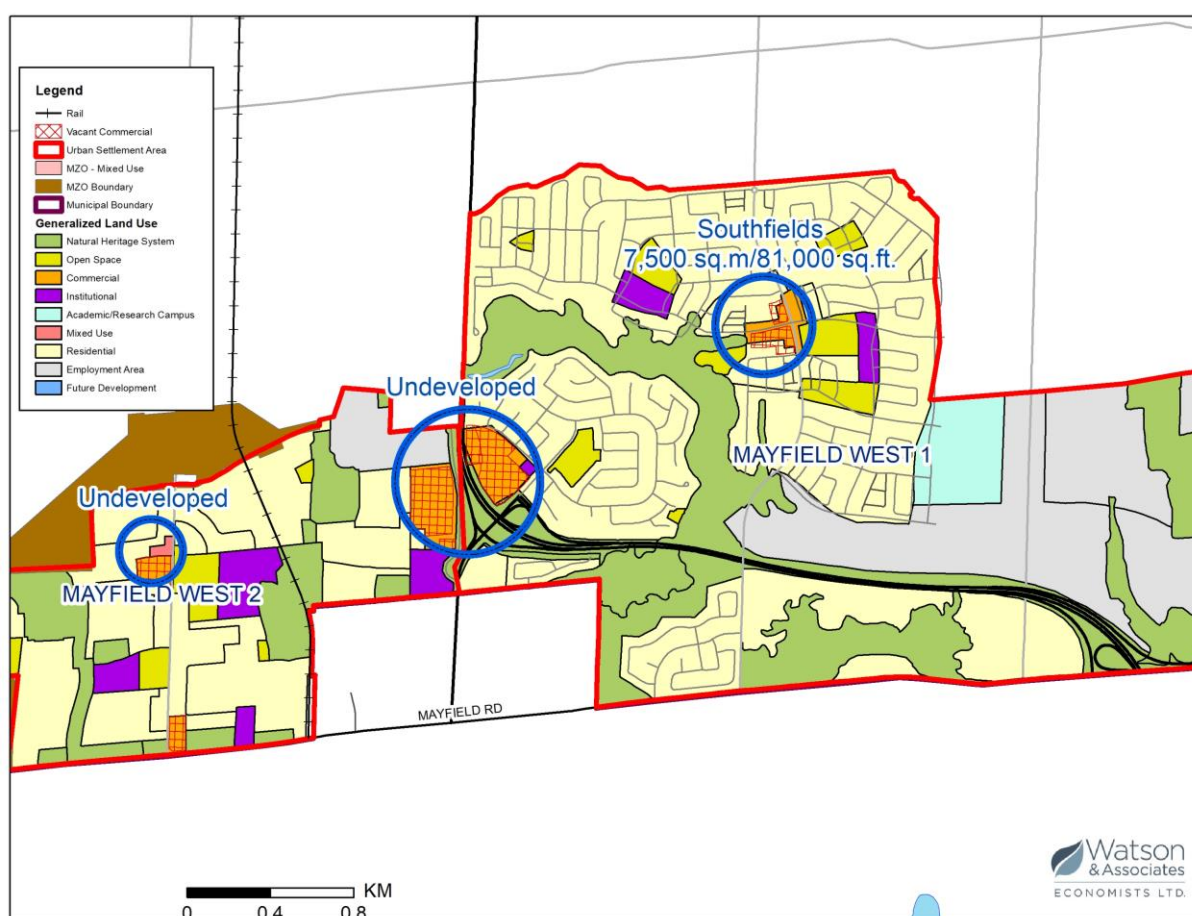




Mayfield West Rural Service Centre

Figure 6-7 geographically illustrates the location of the commercial areas in Mayfield West. There are three commercial areas in Mayfield West; however, only one commercial area has developed commercial uses which is known as Southfields Village Centre. Southfields Village Centre is a mixed-use greenfield commercial area of approximately 7,500 sq.m (81,000 sq.ft).

Figure 6-7
Town of Caledon
Mayfield West Commercial Areas



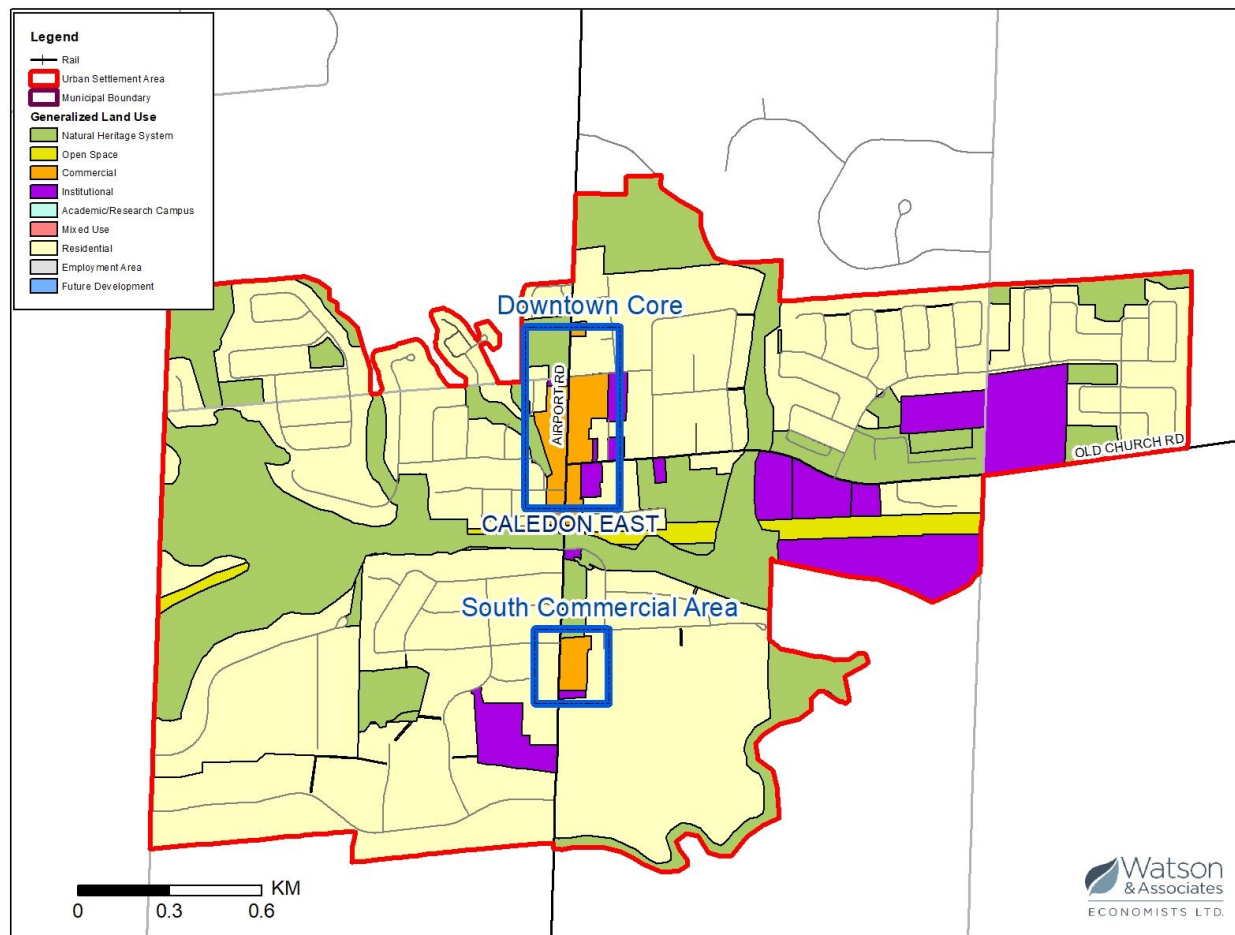
Caledon East Rural Service Centre

Figure 6-8 geographically illustrates the location of the commercial areas in Caledon East. There are two commercial areas in Caledon East, including the Downtown Core and the South Commercial Area. Caledon East has approximately 10,000 sq.m



(108,000 sq.ft.) of retail and commercial space. Most of the retail base is comprised of small retailers.

Figure 6-8
Town of Caledon
Caledon East Commercial Areas



6.5 Vacant Commercial and Institutional Land Supply

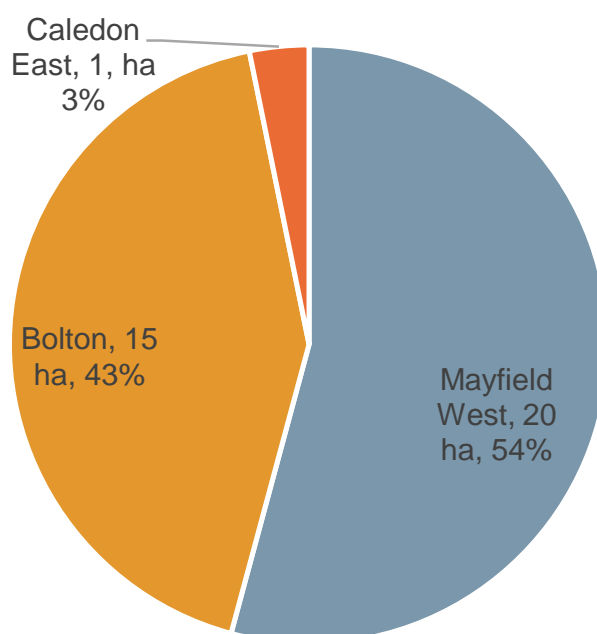
6.5.1 Vacant Commercial Land Supply

Figure 6-9 summarizes the vacant commercial supply in the Rural Service Centres in Caledon. As of 2020, the Rural Service Centres had approximately 36 ha (89 acres) of vacant designated commercial land supply in Community Areas. Based on an employment density of 54 jobs/ha, the Town's vacant commercial lands have the capacity to accommodate 1,900 P.R.E. jobs. The Town's average existing commercial



density in Community Areas is 47 jobs per ha. A higher average commercial density is anticipated over the long-term planning horizon associated with a greater share of commercial services and office uses which tend to have higher densities.

Figure 6-9
Town of Caledon
Rural Service Centres
Vacant Designated Commercial Land Supply, 2020



Source: Watson & Associates Economists Ltd.

A review of the intensification potential on commercial lands was carried out for Bolton and Caledon East, as these two Community Areas have an existing commercial base in the B.U.A. Overall, the commercial areas in Bolton have an average building coverage of 25% (ratio of building space to land area), while the commercial areas in Caledon East have an average building coverage of 24%. The Town's commercial base is generally utilized to typical industry standards. The Highway 50 South Commercial Area in Bolton, which is comprised of automotive-oriented commercial uses, may provide some opportunities for intensification and redevelopment. Opportunities for commercial intensification across the Town's Community Areas is modest relative to the amount of commercial growth anticipated for the Town over the next 30 years. Appendix E provides mapping of vacant and developed commercial lands.



6.5.2 Vacant Institutional Land Supply

Mayfield West is the only Rural Service Centre with vacant institutional land. As of 2020, Mayfield West had approximately 33 ha (82 acres) of vacant institutional lands which included the Academic/Research Campus of approximately 21 ha (52 acres). Appendix E provides mapping of vacant and developed institutional lands.

6.6 Commercial Land Needs

6.6.1 Commercial Building Space Gross Leasable Area Demand

By 2051, it is anticipated that the Town will require approximately 472,900 sq.m (5.1 million sq.ft.) of commercial building space to accommodate commercial development required to support population growth. Forecast commercial building space is based on a 2.2 sq.m (23 sq.ft.) per capita need for retail and commercial space associated with approximately 217,400 new residents over the 2021 to 2051 planning horizon for Bolton, Mayfield West, Caledon East and the Community Area Settlement Area Boundary Expansion lands.^[98] As previously discussed, the Rural Service Centres currently accommodate 3.1 sq.m (33 sq.ft.) per capita of retail and commercial service space as of 2020. A decline in the per capita retail and commercial service space is anticipated, given the impact of e-commerce as well as a shift towards commercial services, which have a downward impact on the need for commercial Gross Leasable Area.

Figure 6-10 provides a forecast of the commercial building space Gross Leasable Area to 2051 by Rural Service Centre for the Town of Caledon in accordance with the results of the P.R.E. forecast developed as part of the Peel Region M.C.R. Key highlights include:

- Community Area expansion lands are forecast to accommodate approximately 405,300 sq.m (4.4 million sq.ft.) of retail and commercial space over the 2021 to 2051 forecast period. New communities will require a range of commercial site opportunities.

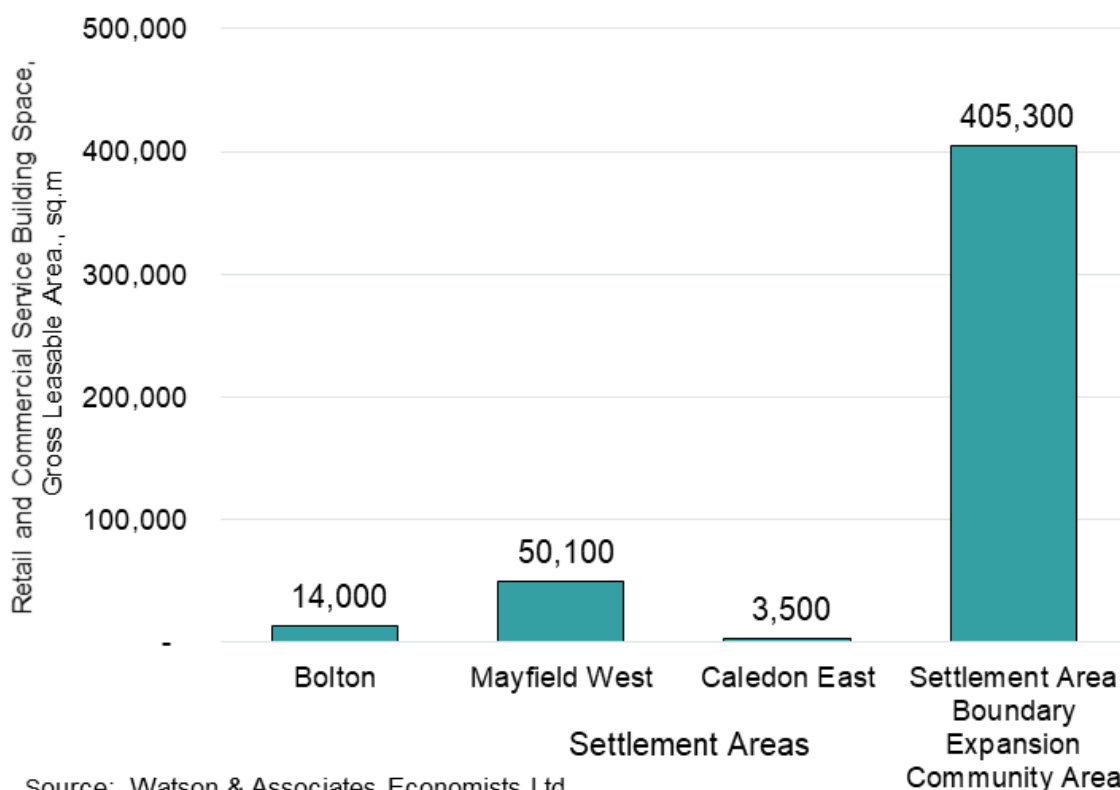
^[98] The Region of Peel Settlement Area Expansion (S.A.B.E.) Study – Employment and Commercial Opportunities Technical Study (p.19) recommended the use of 20 to 25 sq.ft. per capita for commercial building space for S.A.B.E. lands.



- Mayfield West is forecast to accommodate approximately 50,100 sq.m (539,000 sq.ft.) of retail and commercial space. Mayfield West is anticipated to increase its existing per capita retail and commercial space ratio from 0.5 sq.m (5 sq.ft.) per capita to 1.4 sq.m (15 sq.ft.) per capita.
- Bolton is anticipated to accommodate approximately 14,000 sq.m (151,000 sq.ft.) of retail and commercial space. It is assumed that proposed Community Area expansion lands near the existing Bolton Settlement will also serve local residents.
- Caledon East is anticipated to accommodate approximately 3,500 sq.m (38,000 sq.ft.) of retail and commercial space. The forecast assumes a buildout of the settlement area's existing commercial supply. As previously discussed, Caledon East is surrounded by the Greenbelt and has a fixed urban boundary.



Figure 6-10
Town of Caledon
Rural Service Centres
Commercial Building Space Gross Leasable Area (G.L.A.) Demand (sq.m)
2021 to 2051



Source: Watson & Associates Economists Ltd.

6.6.2 Commercial Land Needs to 2051

Figure 6-11 summarizes commercial land needs to 2051 by Rural Service Centre based on a review of commercial land demand and available commercial land supply by area. Total commercial land needs associated with the 2,870 ha (7,090 acre) Community Area Settlement Area Boundary Expansion for the Town of Caledon is also summarized in Figure 6-11.

The existing settlement areas of Mayfield West and Caledon East are anticipated to build out their supply of vacant designated commercial lands, while a 10 ha (25 acre) surplus of commercial lands has been identified for the existing Bolton settlement area. To accommodate demand for retail and commercial employment uses within the Community Area Settlement Area Boundary Expansion (S.A.B.E.), a 162 ha (400 acre) commercial land need has been identified.



Figure 6-11
Town of Caledon
Rural Service Centres
Commercial Area Land Requirements to 2051

Settlement Area	Population Growth, 2021 to 2051	Per Capita Retail & Commercial Service Space (sq.m)	Retail & Commercial Service Space Demand (sq.m), 2021 to 2051	Building Coverage	Commercial Land Demand, ha	Designated Land Supply, ha	Commercial Land Needs, ha to 2051
Bolton	3,100	4.5	14,000	25%	6	15	
Mayfield West	36,000	1.4	50,100	25%	20	20	
Caledon East	3,800	0.9	3,500	25%	1	1	
S.A.B.E. Community Area	174,500	2.3	405,300	25%	162	0	162
Total	217,400	2.2	472,900	25%	189	36	162

Source: Watson & Associates Economists Ltd.

Further details of commercial demand forecast are provided in Appendix D.

6.7 Major Transit Station (M.T.S.A.) Analysis

6.7.1 What is a M.T.S.A?

According to the Growth Plan, 2019, an M.T.S.A. is 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. M.T.S.A.s are generally defined as a 500- to 800-metre radius of a transit station.^[99]

In accordance with the Growth Plan, 2019, M.T.S.A.s are also subject to minimum density targets if they are on priority transit corridors (e.g., 160 residents and jobs per ha for stations served by light rail transit or bus rapid transit, and 150 residents and jobs per ha for those that are served by the GO Transit rail network). Municipalities are required to set a density target for M.T.S.A.s that are not on a priority line. It is important to recognize that the density requirements for M.T.S.A.s are based on buildout and not by a time horizon.

^[99] Growth Plan, 2019, p. 74.



6.7.2 Region of Peel M.T.S.A.s.

In Peel Region, several M.T.S.A.s are identified as priority transit corridors on Schedule 5 of the Growth Plan, 2019. This includes the Hurontario Light Rail Transit (L.R.T.), three GO rail lines (Milton GO, Kitchener GO, and Lakeshore West GO), five Bus Rapid Transit (B.R.T.) lines (403 B.R.T. Mississauga Transitway, Dundas B.R.T., Queen Street B.R.T., 407 B.R.T., and Lakeshore B.R.T.), and five Transit Hub areas.

The Region of Peel through the M.C.R. has identified two M.T.S.A.s in the Town of Caledon, as shown in Figure 6-12:

- Mayfield West Transit Hub (planned M.T.S.A.) – located in the Mayfield West settlement (Phase 2, Stage 2 area) on vacant commercial lands; and
- Caledon GO Transit Station (Primary M.T.S.A.) – located just north of the Bolton settlement area and characterized as a dry industrial area.

It is important to recognize that the proposed M.T.S.A.s in Caledon are not identified in the Growth Plan, 2019 as being located on a priority transit corridor.^[100] Only M.T.S.A.s that are on a priority transit corridor (Growth Plan, 2019, Schedule 5) are subject to the M.T.S.A. density policies identified in the Growth Plan, 2019.

The Caledon GO Transit Station is proposed (draft O.P. policy) as a Primary M.T.S.A. It should be noted that R.O.P.A. 30 brought agricultural lands into the settlement boundary which also make up part of the Caledon GO M.T.S.A. A Primary M.T.S.A. is an area that has existing or planned transit-supportive built forms that can meet or exceed the minimum transit-supportive density target, while a secondary M.T.S.A. has a land-use pattern and built form that may require an alternative density target.^[101]

The Mayfield West Transit Hub is a planned M.T.S.A. Planned M.T.S.A.s, as identified in the Region of Peel's R.O.P., are not yet delineated but will be when infrastructure planning and investment and/or land-use changes unlock potential.^[102]

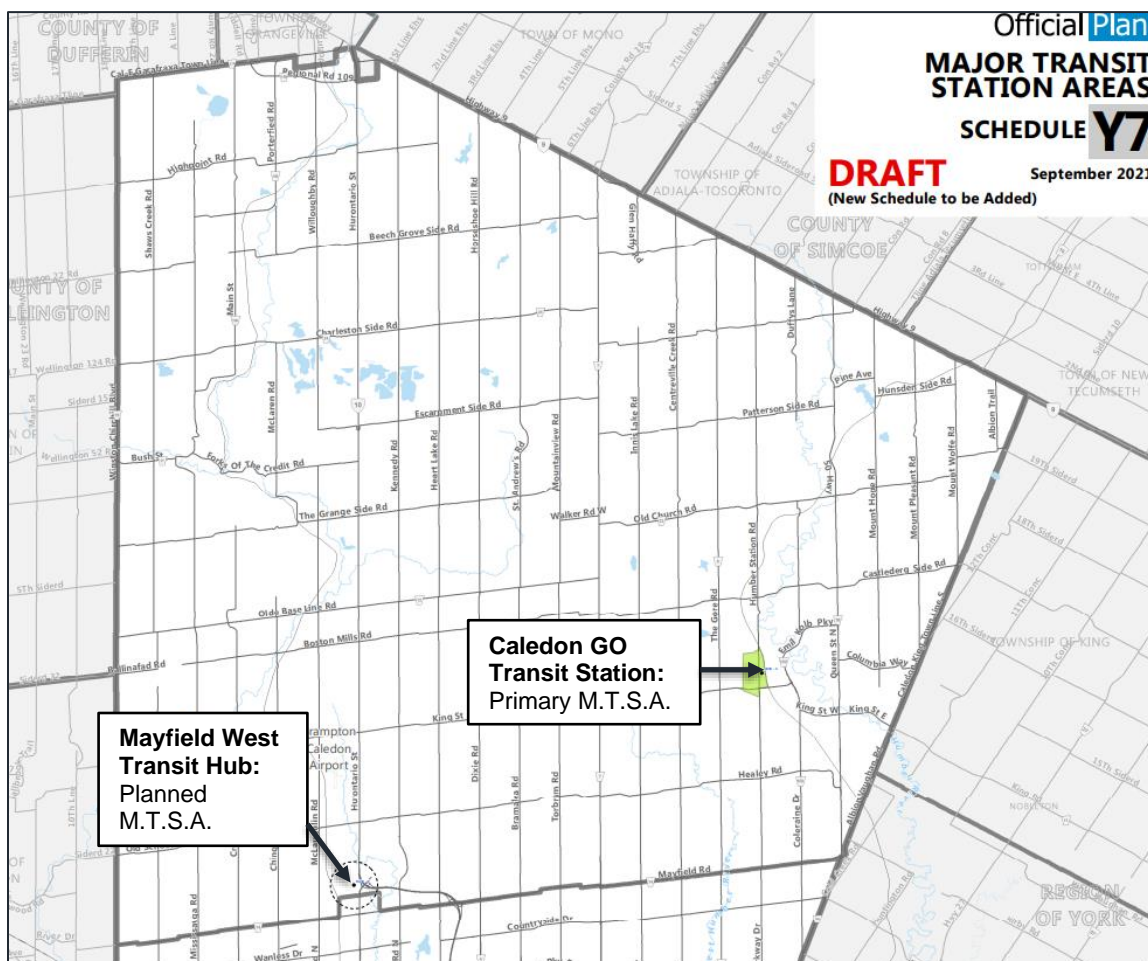
^[100] Growth Plan, 2019, policy 2.2.4, p. 17.

^[101] R.O.P. draft M.T.S.A. policy 5.6.19.6, p. 205, October 1, 2021.

^[102] R.O.P. draft M.T.S.A. policy 5.6.19.6, p. 205, October 1, 2021.



Figure 6-12
Town of Caledon
Map of Draft Region of Peel M.T.S.A.s



Source: Region of Peel, Draft O.P., M.T.S.A. Schedule Y7, September 2021.

6.7.3 Town of Caledon M.T.S.A. Assessment

6.7.3.1 Caledon GO Station M.T.S.A.

Overview

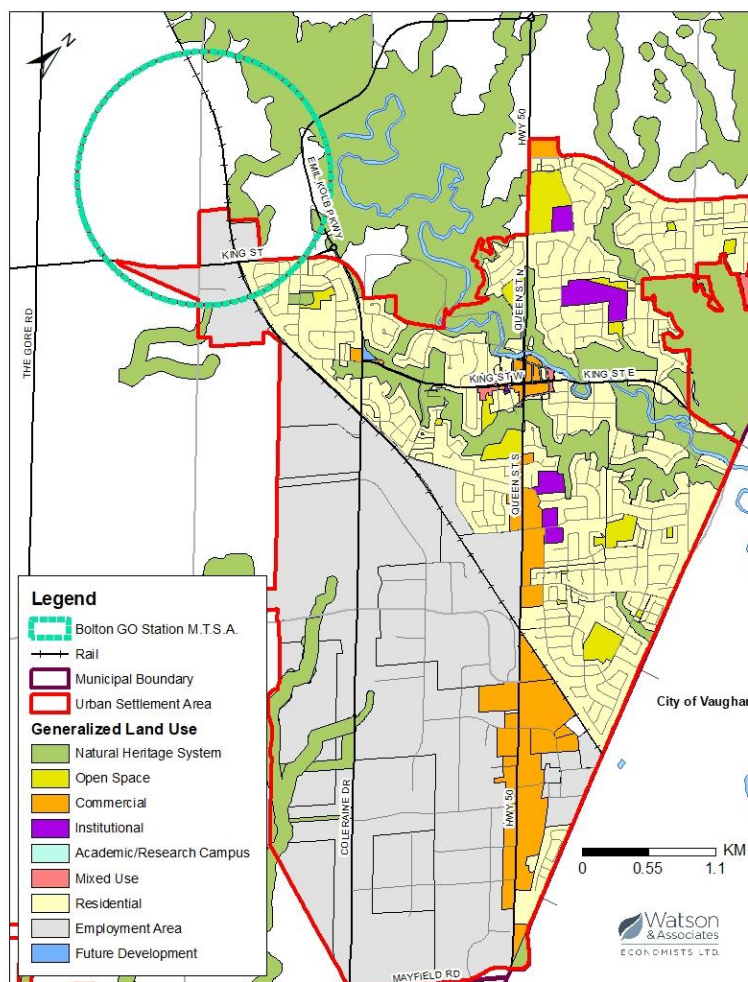
As geographically illustrated in Figure 6-13, the Caledon GO Station M.T.S.A. is primarily vacant and is situated within an Employment Area. As previously discussed, it should be noted that R.O.P.A. 30 brought agricultural lands into the settlement boundary which also make up part of the Caledon GO M.T.S.A. The M.T.S.A. boundary



captures a few small- to medium-scaled industrial users at the intersection of King Street and Humber Station Road and a portion of an established residential neighbourhood, as shown in the land-use map below. Industrial uses in this area are primarily for truck storage with some construction wholesale suppliers. The M.T.S.A. is removed from a high-density Employment Area, such as an office node or downtown core. There is an opportunity to leverage the M.T.S.A. for potential expansion of both Employment Areas and Community Areas.

It is important to note that ROPA 30 brought agricultural lands into the settlement boundary which also make up part of the M.T.S.A.

Figure 6-13
Town of Caledon
Caledon GO Station M.T.S.A.





People and Jobs Target and Capacity

As of 2021, there is a combined total of 630 people and jobs within this M.T.S.A. The land area of the M.T.S.A. is approximately 88 gross ha. As a result, the overall density as of 2021 is 7 people and jobs per ha. In order for the Caledon GO Station M.T.S.A. to achieve a minimum of 150 people and jobs per hectare, there would need to be approximately 14,100 people and jobs in the area. Based on the Region's M.C.R. forecast by small geographic unit (S.G.U.), a combined total of 7,960 people and jobs has been forecast for this area by 2051, which generates an overall density of 91 people and jobs per ha. It should be noted that the Town is planning a forecast under the BRES plan that will be higher and will accommodate significant population and jobs. The BRES Framework Plan is being developed at much higher density and population than what is forecast by the Region of Peel by S.G.U.

Future Opportunities

The Caledon GO M.T.S.A. offers opportunities to connect with other areas of Bolton. For example, the M.T.S.A. is adjacent to the Macville Community Secondary Plan area to the west, and directly south of the M.T.S.A. is the well-established Bolton Employment Area. As previously discussed, there is an opportunity to leverage the M.T.S.A. as a gateway site for new Employment Areas and Community Area lands.

In March of 2021, Ontario Land Tribunal approved R.O.P.A. 30 for the Macville Community Secondary Plan which brings these lands into the Bolton Rural Service Centre Settlement Area Boundary. The Macville Community Secondary Plan includes plans for a mixed-use residential area that is transit supportive. The Macville Community Secondary Plan is expected to achieve a minimum population of 10,900 and 1,100 jobs, generating an overall density of 70 people and jobs per ha. In 2018, Metrolinx updated the Regional Transportation Plan, and reviewed the list of transportation projects. As a result of this update, the Caledon GO rail line is being reprioritized to beyond 2041.^[103]

It is recommended that the Town protect the remaining lands within the M.T.S.A. for future opportunities including major office employment. It is recognized, given the

^[103] Town of Caledon Staff Report 2021-021: Caledon GO Rail Line Status Update.



development of Macville, that the M.T.S.A. may not reach a minimum of 150 people and jobs per ha by 2051.

6.7.4 Mayfield West Transit Hub M.T.S.A.

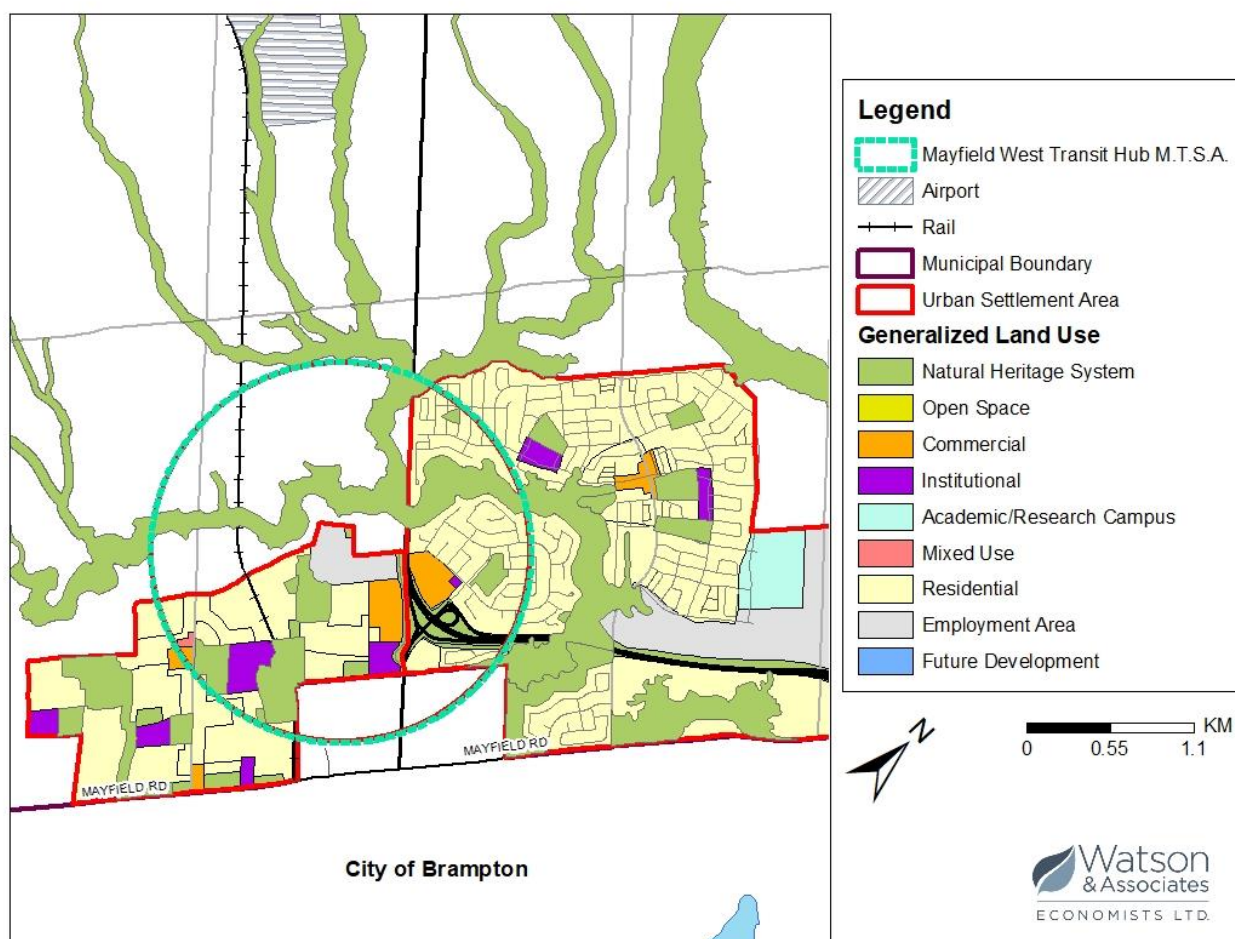
6.7.4.1 Existing Conditions

Overview

As geographically illustrated in Figure 6-14, the Mayfield Transit Hub M.T.S.A. is primarily vacant and is situated on lands designated as Commercial. The area surrounding the M.T.S.A. is primarily undeveloped and is part of the Mayfield Phase 2 Stage 2 Secondary Plan. Currently, this area captures existing residential neighbourhoods that surround Highway 410 and Hurontario Road. There is limited non-residential uses in the immediate area, except for the Brampton Christian School at the north end of the M.T.S.A. and the Church of Archangelo Michael and St. Tekla to the south.



Figure 6-14
Town of Caledon
Mayfield West Transit Hub



People and Jobs Target and Capacity

In order to achieve an overall targeted density of a minimum of 150 people and jobs per ha, the Mayfield West Transit Hub will need to accommodate approximately 11,000 people and jobs (based on approximately 71 ha). Based on the Region's M.C.R. forecast by S.G.U., this area is expected to accommodate 8,600 people and jobs by 2051, which represents an annual average growth of 170 people and jobs per year for the next 30 years.



Future Opportunities

The Mayfield West Transit Hub M.T.S.A. is situated along the southern border of Caledon and Brampton. The purpose of the transit hub is to act as an interchange that allows passengers to connect to multiple modes of transportation. In Mayfield West, the M.T.S.A. has potential connections to the Hurontario B.R.T., which connects to Brampton and Mississauga, in addition to limited pedestrian and cycling infrastructure which is currently available. This M.T.S.A. has the potential to function as an anchor to the Hurontario Employment Area, located immediately to the east, which is envisioned to accommodate high-density employment uses.

6.7.5 *Planning for Employment in Caledon's M.T.S.A.s*

Workers in knowledge-intensive industries increasingly require accessible and dynamic work environments that promote interaction and innovation. This underscores placemaking as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments which integrate retail, office commercial, residential, and other community uses with public open spaces. The success of M.T.S.A.s are highly dependent on their ability to provide places that offer access to both skilled and unskilled labour, vibrant spaces and places for employees, and synergies between businesses.

6.8 Observations

A major provincial policy objective of the Growth Plan, 2019 is that municipalities ensure land is available to accommodate a range and mix of land use to 2051. Designated Population-Related Employment lands within the Community Areas contribute towards providing a diverse range of employment options and commercial services for residents of Caledon. Over the next 30 years, it is anticipated that 41% of the Town's employment will be accommodated within the Community Areas (includes downtown, other designated commercial and institutional lands and Community Area Settlement Area Boundary Expansion). The built form and type of commercial employment over the next 30 years is anticipated to evolve based on changes in consumer behaviour and disruption, largely through e-commerce and technology. Given the rise of e-commerce and other disruptors anticipated over the forecast horizon, policy enhancements to the



Town's commercial structure and other Population-Related Employment lands will be required to ensure that the Town's Community Area base grows with population.

A major thrust in provincial policy is to support mixed-use developments that embrace “complete community” principles such as: encouraging pedestrian movement, increasing employment density and establishing a sense of place. Striking a balance in supporting mixed-use development and ensuring an adequate supply of non-residential lands in the Community Areas will be a key challenge for the Town going forward, especially with increasing pressure to accommodate residential development.

Over the next 30 years, it is anticipated that the Town will require approximately 472,900 sq.m (5.1 million sq.ft.) of commercial building space to accommodate commercial development required to support population growth. This forecast of commercial building space is based on 2.2 sq.m (23 sq.ft.) per capita of retail and commercial space for approximately 217,400 new residents identified between 2021 and 2051 for Bolton, Mayfield West, Caledon East as well as the Community Area Settlement Area Boundary Expansion lands.

Based on the detailed review of supply and demand provided herein, the Town will require approximately 162 ha (400 acres) of commercial land within the Community Area Settlement Area Boundary Expansion lands. The existing settlement areas of Mayfield West and Caledon East are anticipated to build out their supply of vacant designated commercial lands, while a 10 ha (25 acre) surplus of commercial lands has been identified for the existing Bolton settlement area.

The Town's M.T.S.A.s provide an opportunity to anchor major office and provide connectivity to the Town's existing and new Employment Areas and Community Areas. Workers in knowledge-intensive industries increasingly require accessible and dynamic work environments that promote interaction and innovation. This underscores placemaking as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments that integrate retail, office commercial, residential, and other community uses with public open spaces. It should be recognized that such physical qualities are typically what drives successful office real estate markets over the long term.



Chapter 7

Rural Area Opportunities



7. Rural Area Opportunities

The Rural Area in Caledon is largely made up of the Greenbelt Area, natural features, and primary resource lands used for agriculture and aggregate extraction. Villages and Hamlets are concentrations of residential and commercial uses within the Rural Area and are identified as Rural Settlement Areas in the Growth Plan, 2019. The Rural Area in Caledon has partial municipal services (water/wastewater) or private/communal services. This chapter provides an overview of the employment base in the Rural Area and identifies potential employment opportunities over the planning horizon.

7.1 Rural System Components

The Rural System in Caledon is comprised of the following components:

- **Villages:** Inglewood, Cheltenham, Mono Mills, Alton, Palgrave and Caledon Village.
- **Hamlets:** Albion, Belfountain, Campbell's Cross, Cataract, Claude, Melville, Mono Road, Terra Cotta, and Wildfield.
- **Industrial/Commercial Centres:** Sandhill, Tullamore and Victoria. Tullamore and Victoria are proposed to be included in the Urban System as part of the Region of Peel's M.C.R. with full water/wastewater servicing. All forecasts exclude Tullamore and Victoria from the Rural System. Peel Region has not identified Sandhill for potential water/wastewater servicing over the planning horizon (i.e., by 2051).
- **Rural Lands:** Lands within the Rural Area outside Villages, Hamlets and Industrial/Commercial Centres.

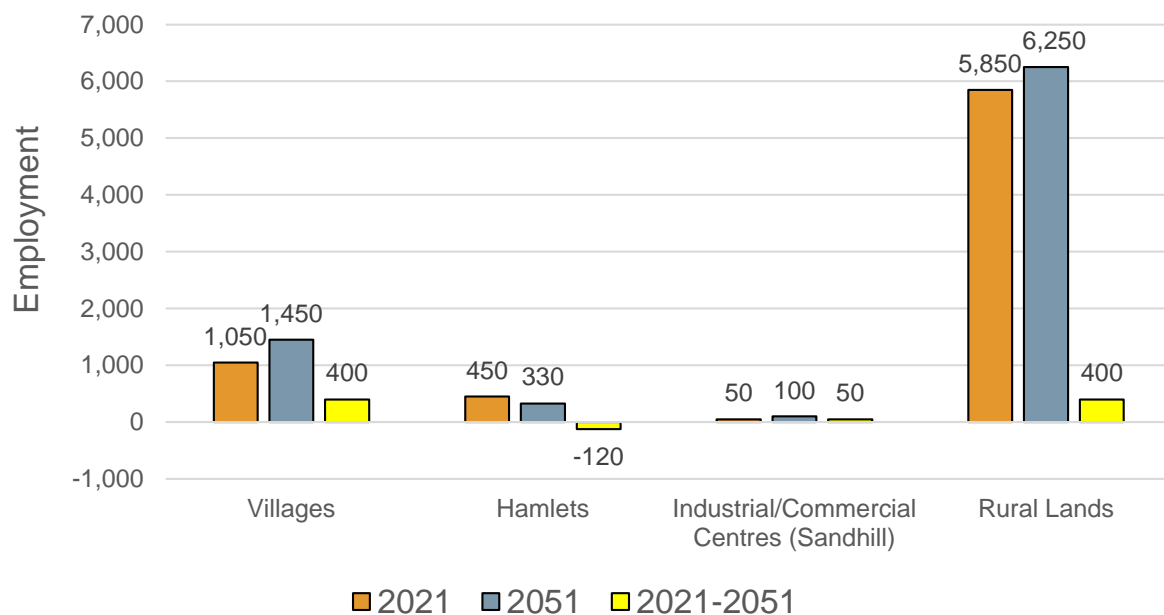
7.2 Rural Growth Forecast

As previously discussed, the Rural Area is anticipated to accommodate a small portion of the Town's employment growth (approximately 1%). In accordance with provincial policies (Growth Plan, 2019; Greenbelt Plan, 2017; and P.P.S., 2020), the majority of the Town's employment growth allocation prepared by Peel Region is directed to areas with existing and/or proposed water/wastewater servicing. Further it is important to note that employment growth represents a net increase, recognizing there may be changes in the existing employment base.



Figure 7-1 provides a summary of existing and anticipated employment over the 2021 to 2051 forecast period. As summarized in Figure 7-1, Rural Lands that provide agricultural, resources, and recreational employment opportunities represent the largest share of employment in the Rural Area. Growth is anticipated to be split between the Town's Villages and Rural Lands. A decline in employment is anticipated within the Hamlets. Most of the employment growth in the villages is allocated to the Villages of Cheltenham and Alton and provides work at home employment and population-related employment. Over the forecast period, industrial/commercial centres, which includes Sandhill, are anticipated to represent a modest share of the Rural Area employment growth. Rural Lands largely comprising agricultural, resources and recreational employment opportunities are forecast to moderately increase over the forecast period, despite the anticipated reduction of rural land to accommodate urban expansion.

Figure 7-1
Town of Caledon
Rural Area
Employment Growth by Location
2021 to 2051



Source: Based on the Region of Peel M.C.R. Forecasts 2051. Summarized by Watson & Associates Economists Ltd.



7.2.1 Rural Employment Opportunities

7.2.1.1 Population-Related Employment (P.R.E.) Opportunities

The Town's Villages provide clusters of commercial and institutional employment activity. The commercial base serves the local population of the Village and surrounding countryside, as well as visitors to the area. Future growth opportunities are supported by a Community Improvement Plan (C.I.P.) for all six of the Town's Villages. A C.I.P. is an important tool under the *Planning Act* that can be used by municipalities to advance goals of enhancing economic vitality and supporting key planning objectives for commercial properties, such as creating a sense of place.

It is estimated the Villages have approximately 14,900 sq.m (160,000 sq.ft.) of commercial building space as of 2021. Provided below is a brief overview of the commercial base of the Villages and a discussion of future opportunities.

Alton

Alton has a thriving creative sector anchored by the Alton Mills Arts Centre, which includes craft shops, studio space units and galleries. Alton has a commercial base of approximately 6,500 sq.m (70,000 sq.ft.) comprised of tourism and local serving retail uses. In addition, the Village has an elementary school, library, fire station, inn, spa and plastic surgery clinic. The Village is located in proximity to the TPC Osprey Valley golf resort which hosts the renowned PGA Tour in Canada. Alton is well positioned to support the Town's tourism market. A map of the developed and vacant commercial and institutional supply in Alton Village is provided in Appendix E.



Alton Village, Alton Mills, a heritage building supporting the growing arts and creative economy in Caledon.

Cheltenham

Cheltenham is small Village surrounded by several natural attractions, including the Cheltenham Badlands. The Caledon Brick Works, a historical landmark, is located just outside the Village. Cheltenham has a general store, inn and a community centre. Employment growth is anticipated to comprise work at home employment and other P.R.E.



Caledon Village

Caledon Village is situated at the juncture of two busy roads in the Rural Area, Highway 10 and Highway 24. Highway 24 is used by the surrounding aggregate industries which generates additional traffic to the area. Caledon Village's commercial base attracts two customer segments – travelling motorists and a local population base. The total commercial base is estimated at 4,600 sq.m (50,000 sq.ft.) of commercial building space. The highway-oriented commercial uses (McDonald's, Tim Hortons and a gas station) are situated at the Village's main intersection, in stark contrast to the historical character of the Village. Over the planning horizon, Caledon Village is anticipated to continue to grow its P.R.E. base. It is recommended that the Town consider policies to limit highway-oriented commercial uses in order to protect the character of the area. A map of the developed and vacant commercial and institutional land supply in Caledon Village is provided in Appendix E.

Mono Mills

Similar to Caledon Village, Mono Mills is in a busy traffic area. Situated at the juncture of Airport Road and Highway 9, Mono Mills accommodates a highway-oriented commercial base (gas stations and restaurants). Over the planning horizon, Mono Mills is anticipated to slightly increase its employment base primarily related to work at home employment opportunities.

Inglewood

Inglewood is a small Village surrounded by natural attractions. The Village has a commercial base with a few retail businesses operating out of historical storefronts. Outside the Village, there are several commercial businesses along Highway 10 that serve travelling motorists. The Village's employment base is anticipated to remain stable with limited employment growth expected.



Palgrave Village

Palgrave Village provides a small commercial and institutional base to the surrounding residents in Palgrave Estates. The urban centre of Tottenham is located just north of



the Village, which provides shopping opportunities for residents. The commercial and institutional base of Palgrave Village is anticipated to remain stable over the forecast.

Hamlets and Remaining Rural Area

The Town's Hamlets provide a limited range of commercial and institutional locations. The employment base is primarily comprised of work at home employment. As previously discussed, over the forecast, the employment base of the Town's Hamlets is anticipated to decline slightly.

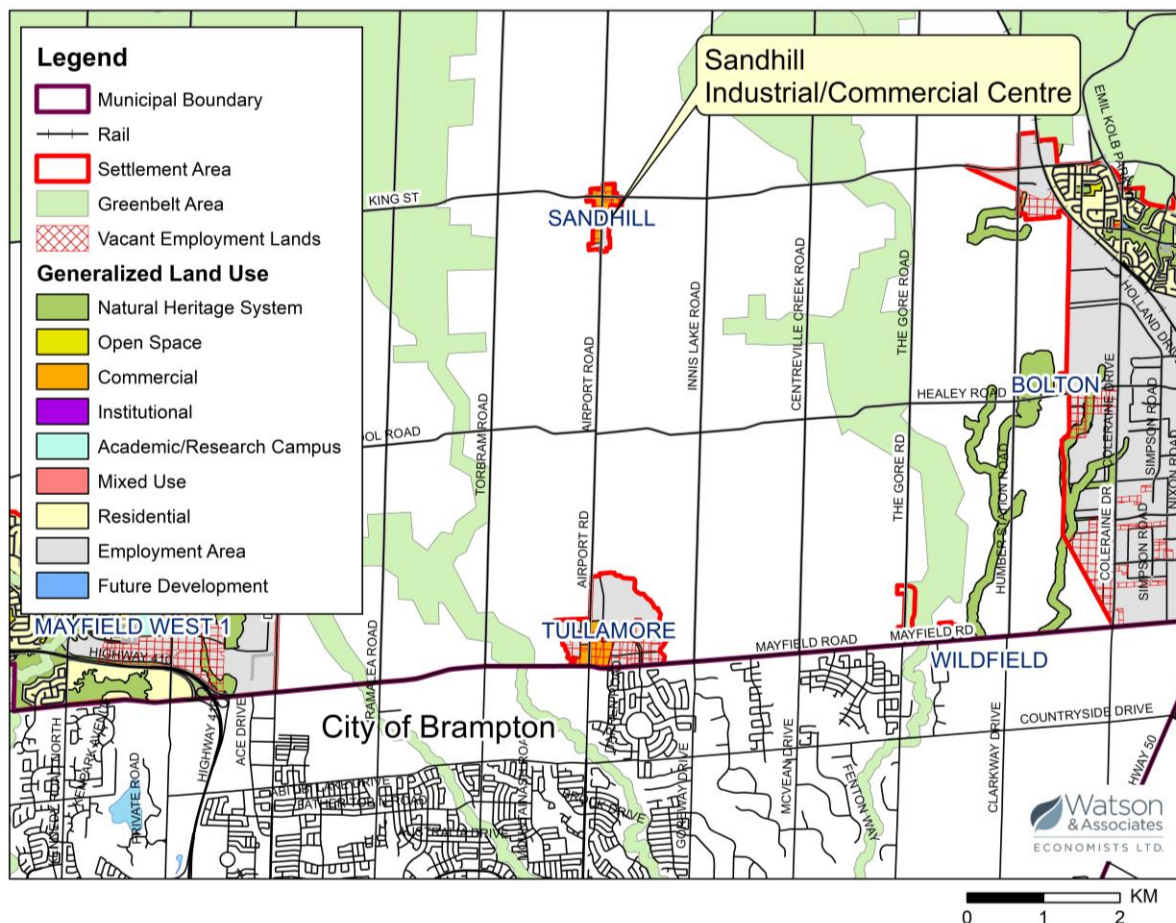
The remaining Rural Area has approximately 5,100 sq.m (55,000 sq.ft.) of commercial space scattered across a vast area primarily serving highway-oriented traffic. Over the forecast horizon, employment growth on Rural Lands is anticipated to be comprised of employment related to agriculture, resources and recreation.

7.2.1.2 Sandhill Employment Area

The Sandhill Employment Area is a dry Employment Area covering a land area of 19 ha. The Employment Area includes a cluster of industrial-type uses as well as commercial uses, including a hardware store and gas stations. As illustrated in Figure 7-2, the Employment Area is situated at the juncture of two major regional highways (Highway 7 (Airport Road) and Highway 9), north of the City of Brampton. The site is surrounded by Rural Lands with some rural residential uses.



Figure 7-2
Town of Caledon
Location of Sandhill Employment Area



The Employment Area offers approximately 8 ha of vacant land, as well as an opportunity for redevelopment of 6 ha of land designated as industrial/commercial centre that currently accommodates rural residential uses. Given its location north of the existing and planned Tullamore Employment Area, the Sandhill Employment Area is anticipated to provide opportunities for employment uses that cannot be accommodated within the Urban Settlement Areas, such as construction laydown yards, transportation depots and other uses requiring minimal site development and municipal servicing. A map of the developed and vacant Employment Area supply in Sandhill is provided in Appendix C.



7.2.1.3 Rural Lands

Agriculture Lands

As previously discussed, the Town's Rural Lands include agricultural, resource and recreational lands. A large portion of these lands are located in the Greenbelt Area, which is protected from large-scale urban development in accordance with provincial policies.

The agriculture system represents the core component of the Town's Rural Lands. It is estimated that approximately 48% of the Town's land base is currently farmed.^[104] These lands play a key role in supporting the Town of Caledon's economy, cultural heritage, and the environmental stewardship of the countryside.

The Town's diverse agricultural sector provides a competitive advantage over other larger urban centres within the G.T.H.A. with respect to the commercialization of value-added agricultural goods and services within the Town's Employment Areas and commercial areas. As discussed in the Town's Agricultural Study, more than half (55%) of farmers in the Town are over the age of 55 and the number of farms has declined over the past decade. In order to maintain this sector, the Town will need to promote this sector by providing a policy framework that supports the vitality of this sector, including opportunities for diversification. It is important to recognize that supporting food security is an important provincial policy objective. As noted in the Town's Agriculture Study, the United Nations projects that the world population will reach 10 billion by 2050, and we will need to produce 56% more food to feed the world's population. Further, the need for more food production is even greater when considering the increase in urbanization around the world and climate change challenges that threaten food production. It is further noted in that study that Ontario has the potential to grow 50% of the food it currently imports. Communities like Caledon play an important role in ensuring that Ontario can continue to offer its residents fresh and affordable food products.^[105]

^[104] The Town of Caledon, *The Road to 2051: An agriculture trends study for planning policy in the Town of Caledon*, February 2021, prepared by Wilton Consulting Group, p. iii.

^[105] Ibid.



Over the forecast, it is assumed that diversification opportunities in the agriculture sector, as well as innovations in agriculture, will provide a level of stability for this sector over the long term. Chapter 8 provides a series of policy recommendations building on policy direction in the Town's Agriculture Study. Further, the Town's agricultural sector in the Rural Area provides an opportunity to better integrate this sector to support employment opportunities in the Urban Area, such as employment in food processing, training and agriculture research and development. The diverse agriculture sector in Caledon provides a competitive advantage over other larger urban centres within the G.T.H.A. with respect to commercialization of value-added agricultural goods and services within the Town's Employment Areas and commercial areas.

Recreational Lands

The Town already has several large recreational attractions to build upon in the Rural Area, including: the TPC Toronto at Osprey Valley (Golf Course); the Caledon Ski Club; and the Caledon Equestrian Park. Supporting the growth in rural tourism is one of the top priorities identified in the Town's Economic Development Strategy. While the Town has a large recreational base to build upon and is further enhanced with the natural features of the Rural Area, it is important to recognize that most of the Town's rural recreational lands are in the Greenbelt. Further, there is a need to ensure that the Town takes a sustainable tourism approach to protect the human and environmental landscape. The Greenbelt Plan, 2017 as previously discussed, supports non-agricultural development opportunities in the Rural Area; however, there are some restrictions on the level of development that can occur.

7.3 Observations

The Town's Rural Area, including its Villages and Hamlets provide a setting to accommodate unique employment opportunities within Peel Region and the broader G.T.H.A. Employment opportunities within the Rural Area that enhance and integrate the Town's agricultural, natural and built heritage features should be prioritized over other development types within the Rural Area. Chapter 8 provides a series of policy recommendations for the Rural Area that support the vitality of the Rural Area, as well as opportunities that integrate the rural and urban economy of the Town.



Chapter 8

Policy Recommendations



8. Policy Recommendations

The primary objective of the Caledon Employment Strategy is to provide a long-term vision that supports a broad spectrum of employment uses over the long-term horizon of the Town's O.P., while ensuring that the Town continues to develop its Employment Areas, commercial areas, Mixed-use Areas and Rural Areas in a competitive and sustainable manner. In general, the Town's Employment Areas and commercial areas should be developed in a manner that allows the Town to build on its past successes, while further enhancing its economic base through continued growth across a diverse range of employment sectors within the context of evolving macro-economic trends.

Fundamental to the broad objectives of the Employment Strategy with respect to the development of industrial type, commercial and employment-supportive uses is an adequate supply and market choice of urban lands over the next 30 years and beyond within well-defined, designated Employment Areas. Generally, these areas should be located in proximity to Goods Movement infrastructure and/or along transportation corridors. Other attributes, such as access to high-order transit, proximity to employment-supportive uses as well as connectivity to Community Areas are also critical for certain Employment Areas, particularly those which focus on knowledge and innovation.

Within the Rural Area, it is recognized that the Town's agricultural base and natural heritage system are core economic assets and represent a regional draw to the Town from a tourism and economic development perspective. The Town's diverse agricultural sector provides a competitive advantage over other larger urban centres within the G.T.H.A. with respect to the commercialization of value-added agricultural goods and services within the Town's Employment Areas and commercial areas. As such, the Town's O.P. should include policies which promote innovation and entrepreneurship in the agriculture sector and explore potential synergies related to economic development in the Town's urban and rural areas.

The purpose of this chapter is to provide O.P. policy direction and recommendations that will assist the Town of Caledon in effectively managing growth and economic development with its Employment Areas, commercial areas, Mixed-use Areas and Rural Areas to 2051. Employment policies are divided into broad key themes, as shown in Figure 8-1. For each Employment theme, a sub-theme is provided with key policy recommendations and action items provided which support local economic and planning



objectives within the development framework of regional and provincial policies. Each Employment theme is outlined within the context of current issues and opportunities, as well as the actions and strategic recommendations for the Town of Caledon.

Figure 8-1
Planning for Employment
Key Themes Policy Recommendations



Source: Watson & Associates Economists Ltd., 2021.



8.1 Planning for Urban Employment Areas in an Evolving Economy

8.1.1 *Ensure that Employment Areas are Well Adapted to Structural Changes Occurring in the Evolving Macroeconomy*

Opportunities and Challenges:

Structural changes occurring in the macroeconomy (i.e., continued shift from goods producing to services producing sectors) pose potential challenges and opportunities for future growth on employment lands in Caledon. Given evolving trends in the G.G.H. economy towards knowledge-based sectors, Caledon will need to encourage and accommodate a wide range of business service and office uses, as well as employment-supportive uses in Employment Areas, where appropriate.



Hereford St., Churchill Business Park, Brampton – Prestige Employment. Gateway to Employment Area.



Roybridge Gate, Vaughan – Designated Employment Commercial Mixed Use in O.P. Danavation Technologies Corp. office and other small and medium offices.



12258 Coleraine Dr., Bolton – The Beer Store Corporate Office and Distribution Centre (integrated). Head office operations relocated to Bolton from Mississauga.

Recommendations:

- Recognize the importance of employment lands in accommodating knowledge-based sectors in addition to traditional industrial sectors.
- Ensure Employment Areas are planned to accommodate opportunities for knowledge-based sectors, as well as a range of office uses and integrated uses which can be appropriately sited within Employment Areas (e.g., a site with integrated distribution and corporate office uses).
- Ensure that Employment Areas provide opportunities for prestige uses, within one or more of Caledon's new Employment Areas. Building design standards, high-quality landscaping and urban amenities are key characteristics of prestige Employment Areas. It is important to note that prestige Employment Area uses



attract not only office uses, but also lighter industrial uses that do not require outdoor site storage or truck parking facilities.

- The Town should plan to accommodate prestige employment uses and major office uses in areas that back onto environmental open spaces and linkages to trail systems to allow for unique place-making opportunities. The Town should plan to accommodate prestige employment uses in areas that back onto open space and parks, as well as strategically positioned at gateway locations that are amenity rich, pedestrian oriented and located within proximity to the Town's growing labour force (refer to section 8.2.2 for further details).

8.1.2 Explore Opportunities for Intensification of Employment Areas within Urban Settlement Areas

Opportunities and Challenges:

Future redevelopment, expansion and infill opportunities will remain as the Town's Employment Areas continue to mature and evolve. Intensification potential on occupied and underutilized employment lands is not well understood given uncertainties regarding the future intentions of existing landowners.

Recommendations:

- Promote and facilitate intensification/infill opportunities in existing Employment Areas.
- Explore opportunities for infill and redevelopment in mature industrial areas.
- Work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assessing feasibility of development.
- Explore redevelopment opportunities on brownfield industrial sites.
- Explore public-private partnerships that would encourage intensification and infill development opportunities within Employment Areas.



8.2 Support Employment Diversification in Employment Areas

8.2.1 *Support the Town's Economic Development Objectives*

Opportunities and Challenges:

Ensure that the Town's Employment Strategy is aligned with the priorities of the Town of Caledon 2021-2031 Economic Development Strategy to strengthen its importance and consistency.

Recommendations:

- Support priority business sectors, including advanced manufacturing, agriculture (including value-added agri-business), tourism (including arts and culture) and elements of the knowledge-based and creative class economy.
- Protect and designate appropriately sized lots for the attraction and retention of priority business and community uses, including advanced manufacturing, food and beverage facilities, office, public health, and post-secondary campuses.
- Explore opportunities for municipal involvement in Employment Area development, including marketing and initiatives that target future investment/development in key industrial sectors identified in the Economic Development Strategy.

8.2.2 *Provide a Wide Spectrum of Employment Area Designations*

Opportunities and Challenges:

Currently the Town of Caledon does not provide a wide spectrum of Employment Area designations. Summarized below and outlined in Figure 8-2 are a range of Employment Area designations that the Town should consider incorporating into its O.P. that supports Economic Development objectives, and the attraction of key industrial sectors as identifies through Town of Caledon's Economic Development Strategy.

Knowledge and Innovation Employment Areas are clusters of higher density employment uses, including office parks, and select institutional. Institutional uses, such as post-secondary facilities (such as institutes supporting industry, e.g., Institute of Food Processing, etc.), university and government research stations/facilities, and research-based medical facilities are permitted if they are considered an anchor in



encouraging employment sectors and other supportive uses that are focused on technology and innovation. Knowledge and Innovation Employment Areas are anticipated to represent a small share of the Employment Area land base (less than 5%). Knowledge and Innovation Employment Areas are recommended to be situated in areas with connectivity to the broader community and offer opportunities for synergies with Major Institutional Uses (e.g., post-secondary campuses and health care precincts) in proximity to Employment Areas. Knowledge and Innovation Employment Areas will strive to attract uses that have a high-quality urban design by implementing urban design guidelines.

Examples of Employment Areas in the G.G.H. similar to Knowledge and Innovation Employment Areas based on the above permitted uses, include the following:

- **City of Hamilton:** Designated in the O.P. as Business Park, the West Hamilton Innovation Park/McMaster Innovation Park is a 64 hectare (158 acres) regional technology node that functions as a centre of innovation for corporate, academic and government research in science and technology. The Employment Area is located 1.5 KM from the McMaster University Campus which is considered a shadow anchor.
- **Niagara Region:** Knowledge and Innovation Employment Areas is a draft Regional O.P. designation for prestige Employment Areas in Niagara-on-Lake, St. Catharines and Thorold that is supported by nearby major institutional uses and are clusters of uses with a higher employment density.
- **Municipality of Clarington:** Courtice Waterfront and Energy Park is a prestige Employment Area focused on innovation related to the energy sector. The Employment Area is 129 hectares (318 acres) and is anchored by the Darlington Energy Complex and the Durham York Energy Centre. The Employment Area is guided by a Secondary Plan with urban design requirements and a range of prestige employment sub-designations.

In accordance with Region of Peel and provincial Employment Area policies, residential uses are not permitted. It is recommended that office and innovation employment environments that include residential uses should be directed to the Community Area in transit-supported areas, such as the M.T.S.A.s. Major Institutional uses, including post-secondary campuses should also be directed to the Community Areas with access to existing or planned regional transit services and opportunities for student housing on-site.



Prestige Employment Areas are dynamic clusters of lighter industrial uses with a broader mix of employment uses including integrated office and industrial uses, Major Office and employment-supportive uses. These Employment Areas are dynamic environments that are planned to respond to the structural changes occurring in the economy, including supporting employment uses that are a hybrid of different functions. These areas should offer strong connectivity to the broader community and should be situated at gateway locations in Employment Areas, with direct access and exposure to arterial roads. Prestige Employment Areas would limit the amount of logistics, warehousing and other associated transportation operations to prestigious developments which are typically integrated with office uses (e.g., distribution centre and corporate office). Trucking terminals, with the primary function of facilitating trucking activity are recommended to be prohibited. Similar to Knowledge and Innovation Employment Areas, Prestige Employment Areas will strive to attract uses that have a high-quality urban design by implementing urban design guidelines.

Institutional uses such as research facilities, industrial trade schools and training facilities are recommended to be permitted if related to the function of the Employment Area.

General Employment Areas are clusters of traditional employment uses, that include manufacturing, construction and at strategic locations, warehousing and transportation uses. To ensure that the General Employment designation contributes towards the diversity of the Town's Employment Area base, General Employment Areas are recommended to include thresholds on the amount of warehousing and transportation uses. Setting an appropriate threshold and identifying appropriate locations for warehousing and transportation uses could be explored through the Secondary Plan process, as well as through a Town-wide Trucking Strategy. Further, building on existing policies in the Town's O.P., the requirement of a Traffic Impact Study for proposed developments during the site plan review could be expanded to include areas that are designated as General Employment.

Stand-alone Major Office uses are recommended to be prohibited from the General Employment Area designation. Employment-supportive uses are recommended to be limited to ancillary uses only and uses requiring on-site storage (e.g., equipment rentals and heavy-duty mechanic services). Institutional uses such as industrial trade schools and training facilities are recommended to be permitted if related to the function of the Employment Area.



Goods Movement District is a cluster of employment uses accommodating and supporting the movement of goods. These types of uses need larger separation distances from residential uses and require good access to arterial roads and 400-series/controlled access highway interchanges. The location and extent of the Goods Movement District is recommended to be informed by a Trucking Strategy that would identify transportation routes to support the flow of goods. The Goods Movement District is recommended to permit Major Office uses and employment-supportive uses, preferably at gateway locations that support the Goods Movement sector. Institutional uses such as research facilities, industrial trade schools and training facilities are recommended to be permitted if related to the function of the Employment Area (e.g., logistics research institutes, forklift training facilities and heavy-duty mechanic trade schools).

It is not the intention of this designation to limit other industrial uses that would be permitted in the General Employment Area designation, such as manufacturing and construction uses. The Goods Movement District designation is recommended to allow for a greater intensity of Goods Movement employment supported by a safe and efficient trucking routes to the Employment Area.

Dry Employment Area is a cluster of employment uses accommodated on lands currently unserviced (water/wastewater). The Dry Employment Area would accommodate select employment uses, such as those in transportation and construction sectors that require land for parking and storage of equipment. The intent of this designation is to reduce the issue of illegal trucking parking in the rural area and to ensure that Employment Area lands on serviced Employment Areas are optimally utilized. Over the long term (post-2051), the Dry Employment Area may have servicing and accommodate fully-serviced employment uses.

Institutional uses, Major Office and employment-supportive uses are not recommended to be permitted within the Dry Employment Area.



Figure 8-2
Town of Caledon
Spectrum of Employment Area Designations





Employment Area Designation Requirements

Provided below is additional information regarding the proposed designations.

Figure 8-3a
Town of Caledon
Targeted Employment Use by Designation

Designation	Employment Uses to Encourage	Employment Uses to Discourage	Policy Options
Knowledge & Innovation District Pedestrian environment, open spaces/trails and integrated with Community Area but preserved for employment uses only. Highest urban design requirements. Industrial uses are limited to those in research and development and small-scale industrial uses in multi-tenant facilities.	<ul style="list-style-type: none"> - Major Office and other offices - Flex-office/industrial multi-tenant - Research and development - Employment supportive uses 	<ul style="list-style-type: none"> - Manufacturing, logistics and warehousing uses - Open storage - On-site storage and uses that generate truck traffic 	Designation or policy overlay with Prestige Employment Area Designation
Prestige Employment Area Arterial road location, connections to future public transportation options, open spaces/trails, moderate buffers from sensitive uses. High urban design requirements. Allows for industrial uses that operate primarily during the daytime with low levels of noise, dust and vibration, as well as those with infrequent movement of products and/or heavy trucks.	<ul style="list-style-type: none"> - Major office and other offices - Research and development - Flex-office/industrial multi-tenant - Integrated logistics/warehousing with office component - Light manufacturing - Employment supportive uses 	<ul style="list-style-type: none"> - Stand-alone logistics and warehousing with no office component - Heavy manufacturing - Open storage - On-site Storage and uses that generate significant truck traffic 	Designation



Figure 8-3b
Town of Caledon
Targeted Employment Use by Designation

Designation	Employment Uses to Encourage	Employment Uses to Discourage	Policy Options
<p>General Employment Area</p> <p>A range of parcel sizes with internal Employment Area location (especially for heavy manufacturing). Lands to primarily accommodate manufacturing. Significant buffers from sensitive uses.</p> <p>Accommodates uses that have frequent noise, ground borne vibration; intense and persistent dust, odour. Limits the amount of uses that generate significant truck traffic.</p>	<ul style="list-style-type: none"> - Manufacturing (light and heavy) - Construction and other sites requiring open storage - Ancillary office uses. - Thresholds on the amount of logistics and warehousing operations. - Ancillary employment supportive uses 	<ul style="list-style-type: none"> - Major office - Non-ancillary employment supportive uses - Goods movement beyond threshold 	Designation
<p>Goods Movement District</p> <p>Large tracts with good access to major highway and Goods Movement Routes. Significant buffers from sensitive uses.</p> <p>Accommodates uses that generate significant truck traffic based on a strategic area(s) that accommodates the efficient movement of goods. Permits uses are also accommodated under General Employment.</p>	<ul style="list-style-type: none"> - All industrial uses, with a greater allowance for logistics and warehousing - Ancillary offices and major office uses related to Goods Movement sector - Open storage at internal locations - Ancillary employment supportive uses - Employment supportive uses related to Goods Movement sector 	<ul style="list-style-type: none"> - Major offices not related to Goods Movement sector - Non-ancillary commercial uses not related to Goods Movement sector 	Designation or Policy Overlay over General Employment Designation

Figure 8-4 provides a summary of the density (jobs/ha), Employment Area land requirements (ha) for serviced Employment Areas.



Figure 8-4
Town of Caledon
Employment Area Designation Requirements

Designation	Employment Growth, 2021 to 2051	Employment Density (jobs/ha)	Employment Area Land Requirements (ha), 2021 to 2051
Knowledge & Innovation District	5,200	77 jobs/ha	68 ha (4%)
Prestige Employment Area	13,000	41 jobs/ha	317 ha (18%)
General Industrial	16,700	21 jobs/ha	809 ha (45%)
Goods Movement District	9,700	16 jobs/ha	602 ha (33%)
Total	44,600	24.8 jobs/ha	1,797 ha (100%)

Source: Watson & Associates Economists Ltd.

Refer to appendix B (pages B-8 and B-9) for further details.



Recommendations:

- Provide a strategic range of Employment Area land-use designations.
- Consider the identification of Knowledge and Innovation Employment Areas that would be anchored by Major Office and/or select institutional uses and accommodate a higher density of employment.
- Limit the amount of warehousing and storage uses and trucking terminals within the Prestige Employment Area designation. The majority of O.P.s in the G.T.H.A. do not permit trucking terminals in Prestige Employment Areas.
- Consider the clustering of employment activities related to the Goods Movement sector (refer to recommendation 8.1.3).
- Identify opportunities for an unserviced, dry Employment Area suitable for a transportation depot/logistics hub offering an option to remove illegal truck parking from agricultural and residential designated properties.
- Update the Town of Caledon Comprehensive Town-Wide Design Guidelines to include area-specific guidelines for new Employment Areas that support the image and intended character of the Employment Area.



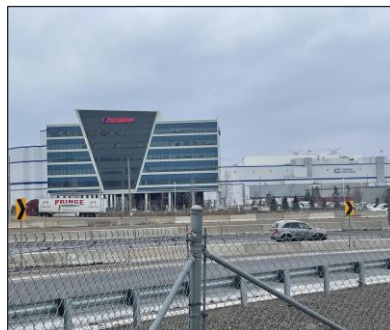
8.2.3 Consider Clustering Goods Movement Sector

Opportunities and Challenges:

The Goods Movement Sector has significantly depleted the supply of land available for the key sectors that the Town of Caledon would like to attract. Further, logistics developments generate significant traffic and trucking parking.



Highway 50 in Bolton is the Town's primary commercial corridor serving residents and an arterial that is also used by the surrounding Employment Area traffic.

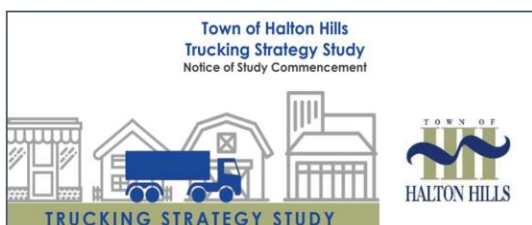


Purolator corporate offices and Conestoga Cold Storage facility, Meadowvale Employment Area, Mississauga. The Goods Movement sector is accommodated by a range of built-forms.

Recommendations:

- Consider clustering the Goods Movement sector, which would form a large business park or zones, to help mitigate the impacts of Goods Movement and to protect Employment Areas in proximity to major Goods Movement corridors.
- Prepare a Trucking Strategy^[106] that would facilitate and direct truck traffic along appropriate corridors that support the efficient functioning of the cluster.
- Support the creation of an urban freight research centre, vocational training or post-secondary opportunities related to Goods Movement to encourage a range of activities related to the sector.

^[106] A Trucking Strategy explores opportunities to facilitate the safe and efficient flow of trucking traffic within the Town that balances the needs of economic activities and the needs of the community.



Town of Halton Hills Trucking Strategy Study (in-progress). Image source: Town of Halton Hills website.

8.2.4 Consider Developing a Special Policy Area for Sector Targeted Growth

Opportunities and Challenges:

With direction from the O.P., Caledon's Employment Strategy should provide a blueprint to guide growth over the planning horizon in certain Employment Areas to target specific sectors.

Recommendations:

- Create a Special Policy Area surrounding the Brampton-Caledon Flight Centre to target the aerospace industry. Consider policies that protect the operation of the airport (such as ensuring the flight paths).
- Protect and identify the Sandhill Employment Area as a Special Policy Area that is designated as an unserviced industrial area suitable as a transportation depot which would allow storage and truck parking, offering an option to remove illegal truck parking from agricultural and residential designated properties.
- Assess the Academic/Research Campus designation in Mayfield West and opportunities for alternative locations based on the outcome of the Post-Secondary Attraction Feasibility Study and Municipal Business Park Feasibility Study (underway).
- Consider O.P. policies that encourage the food science sector and value-added agriculture activities in new Employment Area lands. ^[107]

^[107] A Town council motion by Councilor J. Innis was made on February 15, 2021 for a similar recommendation.



W. Galen Weston Centre for Food, Durham College, Whitby, ON.
Photo Source: Durham College.

8.3 Ensure Adequate Land Supply and Appropriate Utilization of Employment Lands

8.3.1 *Continue to Plan for Future Employment Area Lands Development within the Town of Caledon and Strategically Plan New Employment Areas*

Opportunities and Challenges:

The Region of Peel M.C.R. has identified a shortfall of 1,530 ha of designated Urban Employment Area lands in Caledon. It is anticipated that approximately 38,000 Employment Area jobs in Caledon will be accommodated on new Employment Areas of approximately 1,530 ha through a Settlement Area Boundary Expansion in Caledon. It is important to recognize that the forecast anticipates a significant amount of employment growth with a spectrum of employment uses and sectors over a long-term horizon. The Town will need to ensure that New Employment Areas are phased and strategically planned for an evolving economy.

Over the past several decades, the Town has experienced a low non-residential to residential tax assessment ratio (approximately 20%/80% non-residential to residential tax assessment split). Given the high rate of population growth anticipated for the Town over the coming decades, there is risk that the Town's non-residential tax assessment



ratio will fall further. The Town should strive to at least maintain its existing non-residential tax assessment ratio and it is recommended that the Town monitor the non-residential tax assessment ratio. The Town should explore a study that would assess the tax assessment ratio and consider appropriate measurements to balance the ratio, including the phasing of residential growth.

A key policy objective of the Growth Plan, Region of Peel R.O.P. and Town of Caledon O.P. is to ensure that the Town's existing settlement areas and Settlement Area Boundary Expansion lands are developed as complete communities which are well-balanced between residential and non-residential land uses. As such, it is critical that the Town's urban Employment Areas and other urban non-residential lands are planned in manner which aims to promote economic competitiveness, attract employment growth and maximize employment density and land utilization, where appropriate. Phasing policies should also be explored that require the servicing of greenfield Employment Lands to be completed prior to, or in parallel with, the servicing and development of Community Area Settlement Area Boundary Expansion lands.

Recommendations:

- Regularly monitor employment land absorption and employment density levels.
- Strive to maintain a 10-year supply of shovel-ready Employment Area lands.
- Annually monitor the Town's non-residential to residential tax assessment ratio.
- Explore phasing policies that require the servicing of greenfield Employment Lands prior to, or in parallel with, the servicing and development of Community Area Settlement Area Boundary Expansion lands.
- Undertake Secondary Plans that establish the broader long-term vision, phasing and development guidelines for the New Employment Area. Secondary Plans should provide further details including the intensity of the employment use, built form and urban design, traffic impacts and other planning considerations.
- Update O.P. schedule mapping to include the identification of the Provincially Significant Employment Area Zone (P.S.E.Z.) in the Bolton Employment Area. The P.S.E.Z. is an area identified by the province to be protected from Employment Area conversions outside an M.C.R.
- Update Employment Area conversions policies in the Town's O.P. to confirm with the Region of Peel conversion policies.



8.3.2 Proactively Identify and Protect Future Employment Areas at Strategic Locations both within and Beyond the 2051 Plan Horizon

Opportunities and Challenges:

The Town should proactively plan for new Employment Area lands to the year 2051 as identified through the Peel Region M.C.R. The Region of Peel M.C.R. process, which includes a detailed Employment Area land needs assessment, occurs every 10-years. According to the Growth Plan, 2019, municipalities may plan for the long-term protection of employment areas provided lands are not designated beyond the horizon of the Plan (i.e., 2051).^[108] Accordingly, it is recommended that the Town identify lands that should be reserved as future urban Employment Areas beyond the 2051 planning horizon which are strategically located in proximity to planned Employment Areas, major transportation corridors and/or Goods Movement infrastructure. This would provide Town direction regarding the protection of future lands for Employment Area development where the need for such lands cannot be justified at this time through the Region of Peel M.C.R. process to the year 2051.

For example, the current Regional O.P. for Halton Region identifies a Future Strategic Employment Area overlay. Its Future Strategic Employment Area overlay include lands that area considered as having long term potential for Employment Area development; however, they are not a designated land use; rather they are protected from the encroachment of incompatible uses (especially non-farm uses that are permitted on Rural Lands) and act as a reserve for future Employment Areas. Further, lands within the Future Strategic Employment Area overlay are identified as lands that will be investigated for future infrastructure (water/wastewater and roads). The Future Strategic Employment Area overlay has been key in directing the potential location of additional designated Employment Area lands in the Town of Halton Hills (Premier Gateway Employment Area) as well as the Town of Milton beyond the 2031 planning horizon.

Recommendations:

- In collaboration with the Region of Peel, create a Future Strategic Employment Area Land Reserve overlay that will identify lands for the potential expansion in the future. Lands within the Future Strategic Employment Area Land Reserve will

^[108] Growth Plan, 2019, p. 8.



signal the Town's direction for future Employment Area growth and protect it from incompatible uses that may be permitted within its current designation (e.g., recreational, rural residential uses, etc.).

- The Future Strategic Employment Area overlay should represent the expansion of existing Employment Area and/or provide good access to Goods Movement infrastructure (e.g., highways and other regional infrastructure) and consider proximity to sensitive lands uses, such as residential uses.
- The need to consider lands within the Future Strategic Employment Area Land Reserve would be reviewed during the next Region of Peel M.C.R. and identify any future infrastructure studies.
- The need for Employment Areas with the Future Strategic Employment Area Land Reserve overlay should be regularly assessed by the Town prior to the next Region of Peel M.C.R.

8.3.3 Restrict Major Retail Uses in Employment Areas

Opportunities and Challenges:

Large freestanding retail uses can potentially create negative impacts on the surrounding industrial or employment uses or impact the future prospects of the area for industrial development. Though large, freestanding, retail uses generate employment, they may also absorb large shares of land through their configuration or requirements (e.g., parking), draw considerable traffic from outside the immediate area (creating congestion in the industrial area), or affect the character of the Employment Area. As such, approaches should be developed to discourage major retail development in Employment Areas. While the Town of Caledon has policies in the current O.P. regarding General Commercial, Highway Commercial, Community Shopping Centre Commercial, Local Commercial, and Village Commercial, retail uses can still be permitted on industrial lands if they “accommodate contemporary retail formats to adequately service the area” (section 5.4.3.2).



Food services plaza, approximately 570 sq.m/6,000 sq.ft. Food services are typically small commercial uses averaging less than 300 sq.m (3,200 sq.ft.) per unit and are important amenities for the employees in the area.



Bolton – Power Centre with “baby-box” retailers. Small retail uses that typically sell “products” are often clustered with other retailers to form large retail areas for cross-shopping opportunities.

Recommendations:

- Define “major retail” in the Town of Caledon O.P. as follows:
 - New or expanding large-scale or large-format stand-alone retail stores or retail centres/plazas, having a gross leasable area of 2,000 sq.m (22,000 sq.ft.) or greater, that have the primary purpose of commercial activities. The gross leasable area of major retail applies to both the sales and warehousing/storage component of the building. Retail uses adjacent to the site will be considered as part of the major retail threshold maximum.
- Include the word “expanding” in the definition to recognize the potential of sites that form a contiguous retail site area which may be under different ownership and cumulatively may have a threshold of 2,000 sq.m (22,000 sq.ft.) or larger. The recommended definition should recognize the potential of a hybrid retail store and e-commerce fulfillment centre by stating that the gross leasable area includes the “sales and warehousing/storage” component of the building.
- Support the definition with a policy that limits commercial uses in Employment Areas to specific commercial uses that are employment-supportive uses. The majority of retail buildings in Caledon are under 2,000 sq.m (22,000 sq.ft.).
- Consider exceptions for certain employment-supportive uses such as hotels, business convention centres and fitness centres which often exceed 2,000 sq.m (22,000 sq.ft.).



8.3.4 Provide Stronger Direction Regarding Employment-Supportive Uses in Employment Areas

Opportunities and Challenges:

Due to recent structural changes in the economy there has been a shift in planning philosophy that calls for developing Urban Employment Areas that provide a wider range of employment-supportive uses and amenities, generally clustered at strategic locations (i.e., at major intersections, on the fringe of Employment Areas or transition areas). With this in mind, the intention of employment-supportive uses in Urban Employment Areas should be to serve the needs of employers within the Employment Areas as opposed to the broader population. For this reason, major retail is not recommended in Employment Areas (refer to section 8.3.3).



United Rentals, Tool and Equipment Rental, Meadowvale Business Park, Mississauga. Commercial service use serving the industrial businesses in the area. Site includes a large, fenced storage area.



Marriot Residence Inn, Meadowvale Business Park, Mississauga. An important amenity serving the surrounding corporate offices in an area designated as Corporate Centre in the City of Mississauga O.P.

Recommendations:

- Introduce more defined policy direction in the Town's O.P. to outline the goals and objectives related to employment-supportive uses in Employment Areas (e.g., non-industrial, non-office uses should be of limited scale, or focused on serving businesses and employees in the Employment Areas). Such uses should minimize potential land-use conflicts and support a viable mix of commercial and industrial land uses.
- Consider the introduction of more defined criteria or descriptions regarding the appropriate type, size and location of complementary non-industrial uses in Urban Employment Areas that are service oriented e.g., eating establishments,



personal and health care services, leasing/rental equipment sales and services (excluding automotive sales) and fitness centres at strategic and accessible locations in existing and future Urban Employment Areas, where appropriate.

- Ensure the definition stresses employment-supportive uses as those providing commercial services. Retail establishments that sell new or used products (e.g., food stores, drug stores, hardware/building materials stores, thrift stores, household goods stores and apparel stores), including automotive sales should be directed to designated commercial uses.

8.3.5 Undertake Regular and Ongoing Monitoring of Urban Employment Area Land Supply and Demand to Assist with Longer-term Land-Use Planning and Land Needs

Opportunities and Challenges:

Effectively accommodating employment land development over the longer term requires the implementation of programs and mechanisms to accurately receive, catalogue and assess industrial development information, as well as to assess the available supply of urban employment lands within the Town. The data collected and presented in this study offers the Town a base from which to work, but the Town will need to continue to update and monitor the information on a regular basis.

It is important to ensure not only that there is sufficient land to accommodate requirements but that the location and configuration of available employment lands are appropriate to accommodate employment uses across the range of targeted industrial and office commercial sectors.

Recommendations:

- Develop a system for tracking and monitoring Employment Area land supply and demand data and building on baseline data provided in this Employment Strategy to assist with longer-term planning and land-needs forecasting.
- Track development enquires and potential issues with the O.P. policies to ensure the effectiveness of the O.P. in accommodating employment growth which can be reviewed at the next O.P. review.
- Track the following key employment land supply and demand attributes:
 - Historical land absorption on Employment Area lands by location, sector and size;



- Employment Area land supply (i.e., serviced, serviceable and constrained); and
 - Forecast Employment Area land absorption against actual land absorption in Employment Areas.
- Undertake a comprehensive update to the Employment Strategy every ten years at minimum.

8.4 Climate Adaption and Resilience Principles

8.4.1 *Strengthen Policies for Climate Change Adaptation*

Opportunities and Challenges:

The Town of Caledon has two major river systems, the Credit and the Humber. As such, the natural heritage system in Caledon may be prone to carbon sinks due to extreme rainfalls. As Caledon continues to grow and develop, it is important to take measures to limit local climate change impacts. In 2014, the Region of Peel completed the 2006 Community Greenhouse Gas and Criteria Air Contaminant Inventory, which measures the Region's contribution of greenhouse gas emissions within Peel. This study illustrated that buildings and transportation were the main contributors of greenhouse gas emissions in the Region.

Recommendations:

- Eco-business zones are areas of employment and/or industrial activity that promote environmental quality, economic vitality and social benefits through the continuum of planning, design, construction, long-term operations and deconstruction. The Town should consider policies in the Town's O.P. update to include eco-business zones. ^[109]
- As Caledon aspires to be a leader in environmental sustainability, explore opportunities to accommodate waste recycling/processing and materials reclamation facilities in Employment Areas at appropriate locations (e.g., wooden shipping containers and pallets are often discarded after one use.). Recycling discarded products and by-products is a manufacturing process that avoids

^[109] A Town council motion by Councilor J. Innis was made on February 15, 2021 for a similar recommendation.



extracting natural resources to manufacture products. These facilities would require appropriate buffering from prestige Employment Area uses and sensitive uses. There is an opportunity to explore this concept with eco-business principles.

- Continue to actively promote the Green Development Program in Caledon, whereby the Town provides development charge discounts for new green commercial and industrial buildings to enable developers to create more sustainable buildings in the Town.[110]
- Regularly update the Guide to Eco-Business Zones Planning and Development based on latest Best Practices and new technologies.
- Incorporate the recommendations of the Resilient Caledon Climate Change Action Plan which recognizes the importance of decarbonizing buildings and embedding strong climate change policies within the O.P.
- Explore opportunities to attract investment in renewable energy systems (e.g., geothermal, district energy) in Employment Areas.
- Adopt the Region of Peel Climate Change Master Plan (2020-2030) which has outlined actions, one of which is to retrofit existing buildings, as older buildings are significant emitters of greenhouse gases.
- Currently the Town of Caledon has developed a Sustainable Neighbourhood Retrofit Action Plan for West Bolton,[111] and this Action Plan could be implemented Town-wide, if successful.

[110] The Town of Caledon Green Development Brochure.

[111] Sustainable Neighbourhood Retrofit Action Plan (S.N.A.P.) for West Bolton.



8.5 Strategic Approach in Planning for Commercial and Office Use

8.5.1 *Support the Development of Complete Communities*

Opportunities and Challenges:

Commercial uses are an integral part of building complete communities, as commercial uses support the daily needs of local residents and provide opportunities for social interaction. The planning of new communities and neighbourhoods should consider an appropriate scale and amount of commercial space required to support the community. The viability of commercial uses in non-arterial locations is dependent on the integration of the commercial uses with other uses. It is important to recognize that vibrant mixed-use sites in greenfield areas often require a longer time frame to develop than single-use commercial sites.



Mayfield West, Kennedy Rd., Southfields, ground floor retail and residential uses above.

Recommendations:

- Develop a commercial policy framework towards more compact, mixed-use developments that incorporate retail services, based on an urban form that features buildings aligned along streets with attractive pedestrian environments.
- Ensure a policy framework that focuses on the integration of commercial uses within the community, including the opportunity to integrate neighbourhood-scale institutional facilities into commercial areas.
- Provide opportunities for large commercial developments (e.g., home improvement stores, auto sales and hotels), requiring large parking facilities to be clustered at gateway locations to the urban area.
- Plan for approximately 162 ha (400 acres) of additional commercial land within the Community Area Settlement Area Boundary Expansion lands (i.e., Community Area expansion lands).



- Continue to support the Town's Community Improvement Plans (C.I.P.s) for Bolton, Caledon East and the Town's six villages (Inglewood, Cheltenham, Mono Mills, Palgrave, Alton and Caledon Village). C.I.P. is an important tool under the Planning Act that can be used by Municipalities to advance goals of enhancing economic vitality and supporting key planning objectives for commercial properties, such as creating a sense place.

8.5.2 Protect and Direct Commercial Development in the Established and New Commercial Cores, Nodes, and Corridors

Opportunities and Challenges:

Best practice in planning for commercial development is create a vibrant commercial base that includes a connected structure of strategic nodes and corridors that supports communities throughout the urban area. This involves accommodating commercial uses in mixed-use environments, rather than in stand-alone single-purpose commercial zones. Further, it important to recognize that commercial uses in greenfield areas often take longer to develop than residential uses. Given the significant demand for residential uses, the Town should ensure that commercial areas are protected from conversion pressures for residential uses.

Recommendations:

- Develop O.P. policies that identify commercial cores, nodes and corridors in the Town's urban areas that will accommodate most of the commercial growth, as well as accommodating office and institutional uses.
- Consider two types of mixed-use designations:
 - **Village Mixed-Use** – permits neighbourhood supporting commercial uses and discourages automotive oriented uses (e.g., gas stations, drive-thrus, auto sales/leasing and large non-food store format retail). The Town should consider preparing a criteria based on scale and size when evaluating an application for neighbourhood supporting uses in the Village Mixed-Use designation. [112]

^[112] Criteria may include: 1) the use is considered small-scale, generally having a Gross Floor Area of less than 2,000 sq.m (22,000 sq.ft.) per each lot; 2) The use will contribute to a walkable and complete community; 3) parking at rear of building; 4) commercial provides a focal point in the community.

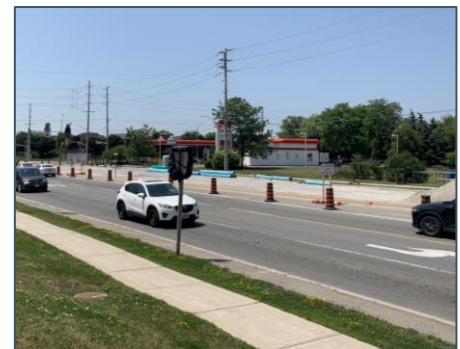


- **Corridor Mixed-Use** – permits a wide-range of commercial uses, including automotive-oriented uses (e.g., gas stations, drive-thrus and large non-food store format retail. Allows for stand-alone commercial uses, as well as mixed-use opportunities. There is a need to consider setting minimum thresholds for commercial uses to ensure that mixed use sites support complete community principles (as discussed further in section 8.5.2), as well as ensuring that existing commercial sites are transitioned with a balanced mix of uses, as well as supporting complete community principles (as discussed further in section 8.5.2).
- Protect and enhance the function of the commercial cores by maintaining policy requirements for ground-floor retail uses to be occupied by commercial uses and directing residential above commercial uses.
- Provide policies that support the viability of commercial areas by directing major retail uses (1,900 sq.m/20,000 sq.ft.) to commercial areas.
- Ensure commercial development in residential areas includes small-scale commercial uses that have a minimal impact on the function of the commercial structure.

8.5.3 Allow Commercial Areas to Evolve into Mixed-use Sites While Protecting Commercial Spaces for the Long Term

Opportunities and Challenges:

A large portion of the Town's existing commercial base in Bolton is situated along Highway 50, an arterial commercial corridor. Arterial commercial corridors, in contrast to downtown areas, are commercial areas that generally have an urban fabric of larger lots, larger buildings, varied setbacks, lower densities and a more automobile-oriented environment. These streets usually do not provide on-street parking. The predominant land use is often single-purpose commercial, many with parking lots located between the building and the street.



Encouraging appropriate mixed-use development opportunities may provide an opportunity to transform these areas into more dynamic environments that encourage



pedestrian movement and place-making, as well as accommodating additional housing options for residents.

The following recommendations build upon the Town of Caledon Queen Street Corridor, Bolton Study Report (March 25, 2019) prepared by Dillon Consulting Limited and Best Practices in transforming arterial commercial areas.

Recommendations:

- Focus intensification to the lands within the southern portion of the corridor (south of the railway line) and encourage opportunities to reduce heavy truck traffic to this area.
- Explore opportunities for higher density commercial and higher density residential activity along Highway 50 between McEwan Dr. and George Bolton Parkway to support establishing a new commercial core.
- Consider updating the Town's urban design guidelines and land-use schedules based on the recommendations of the Town of Caledon Queen Street Corridor Study Report.
- Continue to encourage a community service component, such as day care, library, theatre or similar service facilities as part of the Shopping Centre designation, the Town's large format retail designation.
- When reviewing proposed mixed-use developments on commercial sites ensure that the development supports complete community principles and maintain an adequate mix of non-residential uses. Proposals for redevelopment of commercial sites should retain at least 25% of the existing commercial floor space within the mixed-use development. Mixed-use developments on vacant sites should require a Floor Space Index minimum of 0.15 for commercial uses. Establishing a benchmark of 0.15 Floor Space Index allows flexibility in the marketplace to respond to future trends and to integrate non-commercial uses onto mixed-use sites as well as allowing the ability to address individual site-specific circumstances.^[113]
- The Town of Caledon should consider the review of the proposed mixed-use development as part of a Commercial Functional Study prepared by applicant. This study would provide an assessment of the commercial need, the

^[113] The City of Guelph Official Plan Amendment No.69 has similar commercial policies which was informed by the City's Commercial Policy Review.



development impact on the commercial structure and how the mixed-use development would be best integrated in the existing community. The objective is to balance the need to accommodate vibrant mixed-used developments while protecting the Town's commercial structure.^[114]

8.5.4 *Support the Viability of Office by Providing Appropriate Mixed-Use Opportunities*

Opportunities and Challenges:

Mixed-use developments provide an opportunity to accommodate a range of office uses, while supporting place-making and increasing density.

Recommendations:

- Provide opportunities for mixed-use development that require provisions for non-residential space through commercial intensification.
- Protect unique opportunities for office development, such as the M.T.S.A.s.
- Encourage office development within existing commercial areas, diversifying the employment base.

8.5.5 *Planning for Employment Growth within Major Transit Station Areas*

Opportunities and Challenges:

Workers in knowledge-intensive industries are increasingly demanding accessible and dynamic work environments that promote interaction and innovation. This underscores placemaking as an increasingly recognized and important concept in creating diverse and vibrant workplaces, which in turn can help attract local population and job growth, provided that other necessary infrastructure requirements are met. This is particularly relevant in mixed-used environments which integrate retail, office commercial, residential, and other community uses with public open spaces.

^[114] The City of Guelph O.P.A. No. 69 has a similar policy. Other Municipalities, including the City of Hamilton have set minimum commercial floor space minimums on designated mixed-use sites and require market studies for developments that propose a low threshold for commercial floor space.



The success of M.T.S.A.s are highly dependent on their ability to provide places that offer access to both skilled and unskilled labour, vibrant spaces and places for employees, and synergies between businesses. As part of the Peel 2051 Official Plan and M.C.R., the Region is developing a strategy and policies to guide how growth is accommodated within M.T.S.A.s across the Region working with Mississauga, Brampton, and Caledon. Currently, a boundary delineation has been created for two M.T.S.A. areas – the Caledon GO M.T.S.A. and the Mayfield West Transit Hub M.T.S.A. The planned density of the M.T.S.A.s in Caledon is a minimum of 150 people and jobs per hectare. The M.T.S.A.s currently have a low people and jobs density given that the areas are largely undeveloped.^[115]

Recommendations:

- In planning for M.T.S.A.s, be realistic about the amount of office growth that might be attracted to these areas over the planning horizon.
- In planning for new office developments within M.T.S.A.s, recognize that there needs to be corresponding consideration to prioritize development to also create future transit-oriented vibrant corridors and minimize potential competition between these locations.
- A place-based approach should allow for flexible planning frameworks which encourage investment in mixed-use, co-working, shared office space, incubators/accelerator facilities for start-up businesses, as well as longer-term opportunities for larger scale stand-alone office space. With this in mind, the primary objective of planning policies for M.T.S.A.s should be to create high-quality, mixed-use urban environments that offer access to high-order transit services, a walkable and cyclable public realm, services and amenities including restaurants, cafes, shops, daycare facilities, arts, and well as cultural and indoor/outdoor recreational facilities. It should be recognized that such physical qualities are typically what drives successful office real estate markets over the long term.
- Accelerate infrastructure investment and capacity to facilitate development/redevelopment efforts across M.T.S.A.s with the strongest identified real estate market opportunities.

^[115] Town of Caledon Staff Report 2020-0312 Town of Caledon Initial Planning Comments on Status of Peel 2041+ Regional Official Plan Review <https://pub-caledon.escribemeetings.com/filestream.ashx?DocumentId=11289>



- Prepare an M.T.S.A. study that will explore in greater detail long-term opportunities for target employment and residential uses within the Town's M.T.S.A.s.

8.6 Support Economic Opportunities in the Rural Area

8.6.1 *Protect Agricultural Lands and Ensure that the Agricultural Sector Adapts to a Growing Population Base*

Opportunities and Challenges:

Approximately 48% of the Town's land base is currently farmed.^[116] Agricultural lands have an important role in supporting the Town of Caledon's economy, cultural heritage, and environmental stewardship. Policies should ensure that the Town's agricultural operations are not negatively impacting urban growth and support the enhancement of the Town's agriculture productivity.

The following recommendations are based on "The Road to 2051: An agriculture trends study for planning policy in the Town of Caledon" (February 22, 2021).^[117]

Recommendations:

- Implement a transition-to-farming designation.
- Consider strengthening the requirements of an agricultural impact assessment.
- Allow or provide greater flexibility for small lot agriculture.
- Explore opportunities to integrate agriculture into urban and residential spaces and promote urban agriculture.

^[116] The Town of Caledon, The Road to 2051: An agriculture trends study for planning policy in the Town of Caledon, February 2021, prepared by Wilton Consulting Group, p. iii.

^[117] Ibid.



8.6.2 Continue to Recognize Opportunities for Agricultural-Related Industrial and Commercial Uses on Agricultural Lands

Opportunities and Challenges:

The agricultural base represents a significant component of Caledon's local economy. The agriculture and agri-food system encompass several industries including the farm input and service supplier industries, primary agriculture, food and beverage processing, food distribution, retail, wholesale and food service industries. The agricultural sector may also provide opportunities to develop renewable energy sources, including bioenergy, biogas, biofuel and geothermal energy.

Further, the Town's agricultural sector in the Rural Area provides an opportunity to better integrate this sector to support employment opportunities in the Urban Area, such as employment in food processing, training and agriculture research and development. The diverse agriculture sector in Caledon provides a competitive advantage over other larger urban centres within the G.T.H.A. with respect to commercialization of value-added agricultural goods and services within the Town's Employment Areas and commercial areas.

Recommendations:

- Continue to recognize opportunities for agricultural-related industrial and commercial uses which are permitted in agricultural areas subject to Region of Peel O.P. and provincial policies.
- Enhance policies to provide distinctions on the types of agriculture, agriculture-related and on-farm diversified uses permitted in accordance with the P.P.S., 2020.^[118]
- Provide information to the public on the opportunities for diversification, including exploring a workshop or information session.
- Encourage the agriculture sector to be innovative by ensuring that policies support the development of renewable energy operations on agricultural lands, such as biomass energy, biogas, biofuel and geothermal energy.

^[118] The Ontario Ministry of Agriculture, Food and Rural Affairs has prepared Guidelines on Permitted Uses in Ontario's Prime Agricultural Areas (Publication 851, 2016) that provides direction on the types of uses; however, the document was prepared under the P.P.S. 2014 and should be carefully utilized for informational purposes.



- Support opportunities for post-secondary research stations related to the agriculture sector in the Rural Area.
- The Town's O.P. should include policies which promote innovation and entrepreneurship to the agriculture sector and explore potential synergies related to economic development in the Town's urban and rural areas.

8.6.3 Identify Community Assets to Support Economic Development and Economic Diversification

Opportunities and Challenges:

The Town's Rural Area, including its villages and hamlets provide a setting to accommodate unique employment opportunities within Peel Region and the broader G.T.H.A. Employment opportunities within the Rural Area that enhance and integrate the Town's agricultural, natural and built heritage features should be prioritized over other development types within the Rural Area.



Recommendations:

- Develop a Cultural Master Plan that documents the community and cultural assets in Caledon.
- Review the Town's Cultural Heritage Landscapes Inventory prepared in 2009 (prepared prior to the P.P.S. 2020) and identify if any necessary changes are required. An area that is identified as a Cultural Heritage Landscape in an Official Plan will protect the feature and influence future development opportunities. The Town's O.P. currently identifies the Town's Cultural Heritage Landscapes and has policies to protect these assets.



- Encourage a sense of place in new non-residential developments that embrace design features and protect views of the surrounding of heritage and cultural resources.
- Based on the provincial Greenbelt Plan, 2017, updated O.P. policies that identify the type and scale employment and non-residential development opportunities that can be accommodated within the Greenbelt Area.
- In accordance with the Greenbelt Plan 2017, Official Plans can be more restrictive than the Greenbelt Plan, 2017 with the types of uses permitted on Rural Lands within the Greenbelt Area.^[119] It is recommended given the extent of the Greenbelt Area within the Town of Caledon and the economic objectives of the Town to support a vibrant Rural Area that the Town carefully consider not placing further restrictions on non-residential opportunities on Rural Lands in the Greenbelt Area other than what is provided in Region of Peel and provincial policies.

8.6.4 Identify Tourism Opportunities that Support an All-Season Destination for Residents, Visitors and Potential Investors

Opportunities and Challenges:

The Town's blend of urban communities, rural settlement areas and rural countryside forms a large part of the foundation which creates the "quality of place" that continues to increasingly attract new residents to the area. The Town already has several large recreational attractions to build upon, including: the TPC Toronto at Osprey Valley (Golf Course); Caledon Ski Club; and the Caledon Equestrian Park. Supporting the growth in the tourism sector is one of the top priorities identified in the Town's Economic Development Strategy.

Recommendations:

- In accordance with the Greenbelt Plan, 2017 provide policies that encourage Rural Lands within the Greenbelt Area to support a range of recreation and tourism uses such as trails, parks, golf courses, bed and breakfasts and other tourism-based accommodation (serviced playing fields and campgrounds and resorts).^[120]

^[119] Greenbelt Plan, 2017, policy 4.1, p. 37.

^[120] Ibid., policy 3.1.4, p. 18.



- Encourage the development of tourism-supportive uses (such as hotels, gas stations and commercial outlets) in the hamlets, villages and rural service centres (Bolton, Mayfield West and Caledon East).
- Protect the commerce function of the Town's villages and hamlets by providing policies that encourage commercial growth at a scale that is appropriate to the settlement area and discourages the conversion of commercial storefronts to residential uses.
- Continue to promote agricultural products such as artisan food, craft beer, wine and cider experiences, and on-farm markets that allow for a farm-to-table experience for visitors.
- Support "farmgate" (agricultural properties with sales stands that sell produce, maple syrup and other agriculture products directly to the consumer) commerce activity in the Rural Area.



Chapter 9

Next Steps



9. Next Steps

As previously mentioned, the Town is preparing a new O.P. to bring into conformity with provincial and Region of Peel policies, and to incorporate the local vision and guiding principles in the O.P. policies. As part of the O.P. process, the Town has prepared a series of background studies which focus on key growth management topics and planning policy themes. The new O.P. will include updated policies and schedules that are informed from recommendations provided in these studies, including this Employment Strategy study. Further, the recommendations provided in the Employment Strategy will provide guidance in planning for employment in Secondary Plans and other site-specific plans.



Appendix A

Region of Peel Supplemental M.C.R. Forecast and Land Needs Figures



Appendix A: Region of Peel Supplemental M.C.R. Forecast and Land Needs Figures

Region of Peel M.C.R. Forecast

Figure A-1
Town of Caledon and Region of Peel
Population Forecast to 2051

Period	Caledon	Peel Region	Caledon as Share of Region (%)
2016	69,000	1,433,000	5%
2021	80,000	1,578,100	5%
2026	96,100	1,714,900	6%
2031	112,000	1,829,100	6%
2036	152,000	1,938,000	8%
2041	201,000	2,050,000	10%
2046	248,800	2,164,400	11%
2051	300,000	2,280,000	13%
2016-2021	11,000	145,100	8%
2021-2026	16,100	136,800	12%
2021-2031	32,000	251,000	13%
2021-2036	72,000	359,900	20%
2021-2041	121,000	471,900	26%
2021-2046	168,800	586,300	29%
2021-2051	220,000	701,900	31%

Note: Includes net Census undercount.

Source: Region of Peel M.C.R. 2051 forecasts, tabular data, received September 2021.

Summarized by Watson & Associates Economists Ltd.



Figure A-2
Town of Caledon and Region of Peel
Employment Forecast to 2051

Period	Caledon	Peel Region	Caledon as Share of Region (%)
2016	27,100	695,400	4%
2021	31,900	731,700	4%
2026	43,200	813,600	5%
2031	53,300	862,300	6%
2036	64,600	904,500	7%
2041	82,300	955,900	9%
2046	103,600	1,011,300	10%
2051	125,100	1,066,600	12%
2016-2021	4,800	36,300	13%
2021-2026	11,300	81,900	14%
2021-2031	21,400	130,600	16%
2021-2036	32,700	172,800	19%
2021-2041	50,400	224,200	22%
2021-2046	71,700	279,600	26%
2021-2051	93,200	334,900	28%

Source: Region of Peel M.C.R. 2051 forecasts, tabular data, received September 2021.
Summarized by Watson & Associates Economists Ltd.

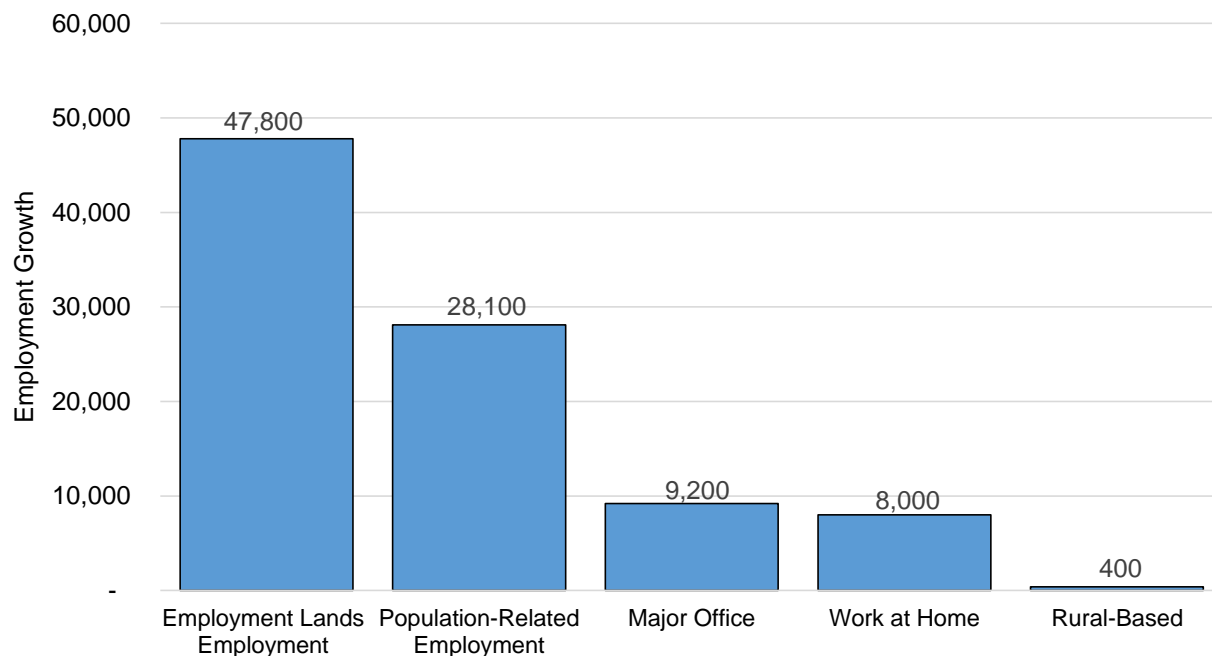


Figure A-3
Region of Peel
Employment Allocation by Area Municipality to 2051

Period	Brampton	Caledon	Mississauga	Peel Region
2016	191,400	27,100	476,800	695,400
2021	210,400	31,900	489,400	731,700
2026	249,400	43,200	520,900	813,600
2031	275,600	53,300	533,400	862,300
2036	294,300	64,600	545,600	904,500
2041	314,700	82,300	558,900	955,900
2046	335,300	103,600	572,500	1,011,300
2051	355,600	125,100	585,900	1,066,600
2021-2051	145,200	93,200	96,500	334,900
Annual Growth Rate	1.8%	4.7%	0.6%	1.3%
Share of Region Growth (%)	43%	28%	29%	100%

Source: Region of Peel M.C.R. 2051 forecasts, tabular data, received September 2021.
Summarized by Watson & Associates Economists Ltd.

Figure A-4
Town of Caledon
Employment Growth Forecast by Type, 2021 to 2051



Source: Region of Peel M.C.R. 2051 forecasts, tabular data, received September 2021.
Summarized by Watson & Associates Economists Ltd.



Figure A-5
Town of Caledon
Employment Growth Forecast by Area, 2021 to 2051

Area	2021-2051	Share (%)
Urban Employment Areas	54,500	58%
Urban Community Areas	38,300	41%
Rural Areas ^[1]	700	1%
Total	93,500	100%

^[1] Includes Villages & Hamlets and Rural Lands.

Notes: Work at home included in Urban Community Areas & Rural Areas.

Source: Derived from the Region of Peel M.C.R. 2051 forecasts, tabular and G.I.S. data, received September 2021. Summarized by Watson & Associates Economists Ltd.

Figure A-6
Town of Caledon
Employment Growth Forecast by Settlement Area Type, 2021 to 2051

Location	2021	2051	2021-2051
Existing Urban Settlement Areas Boundaries ^[1]	72,630	234,570	161,940
Settlement Area Boundary Expansion (S.A.B.E.)	n/a	57,400	57,400
Total Urban	72,630	291,970	219,340
Villages	1,050	1,450	400
Hamlets	450	330	-120
Sandhill Employment Area	50	100	50
Rural Lands	5,850	6,250	400
Total Rural	7,400	8,130	730
Town of Caledon	80,000	300,000	220,000

^[1] Includes growth within existing urban boundary of Bolton, Mayfield West, Caledon East, Tullamore and Victoria.

Notes: Work at home included in above figure.

Town-wide totals have been rounded.

Source: Derived from the Region of Peel M.C.R. 2051 forecasts, tabular and G.I.S. data, received September 2021. Summarized by Watson & Associates Economists Ltd.



Figure A-7
Town of Caledon
Settlement Area Boundary Expansion (S.A.B.E.) –
Community Area and Employment Area
Employment Growth, 2021 to 2051

Location	2021-2051
S.A.B.E. – Urban Community Area	19,400
S.A.B.E. – Urban Employment Area	38,000
Total S.A.B.E.	57,400

Source: Derived from the Region of Peel M.C.R. 2051 forecasts. Region of Peel Land Needs Assessment Report, September 2021, pp. 53 and 65. Summarized by Watson & Associates Economists Ltd.

Figure A-8
Town of Caledon
Settlement Area Boundary Expansion (S.A.B.E.) –
Identified Expansion Land Requirements

Location	Land Area, ha
S.A.B.E. – Urban Community Area (Includes P.R.E. Lands and Residential Lands)	2,870
S.A.B.E. – Urban Employment Area	1,530
Total S.A.B.E.	4,400

Source: Derived from the Region of Peel M.C.R. 2051 forecasts. Region of Peel Land Needs Assessment Report, September 2021. Summarized by Watson & Associates Economists Ltd.

Figure A-9
Town of Caledon
Employment Area Density (jobs/gross ha)

Location	Jobs/gross ha
Existing Employment Area, 2021	14
2021-2051	24.8

Source: Derived from the Region of Peel M.C.R. 2051 forecasts. Region of Peel Land Needs Assessment Report, September 2021. Summarized by Watson & Associates Economists Ltd.



Appendix B

Employment Area Forecasts and Target Sectors Supplemental Figures



Appendix B-1: Employment Area Forecast Supplement Figures

Figure B-1
Region of Peel
Employment Forecast Shares by Sectors, 2001 to 2021

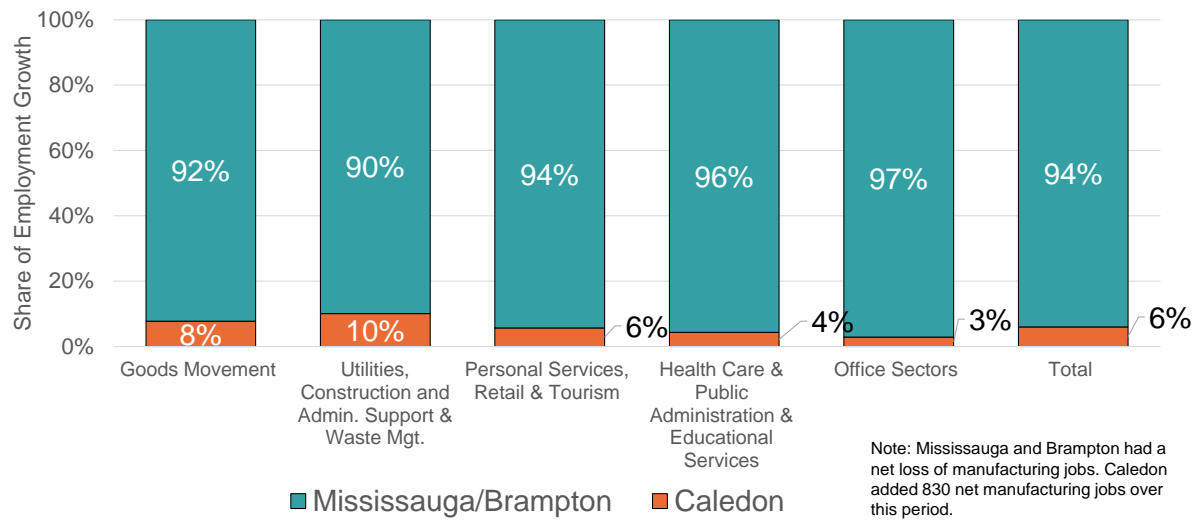
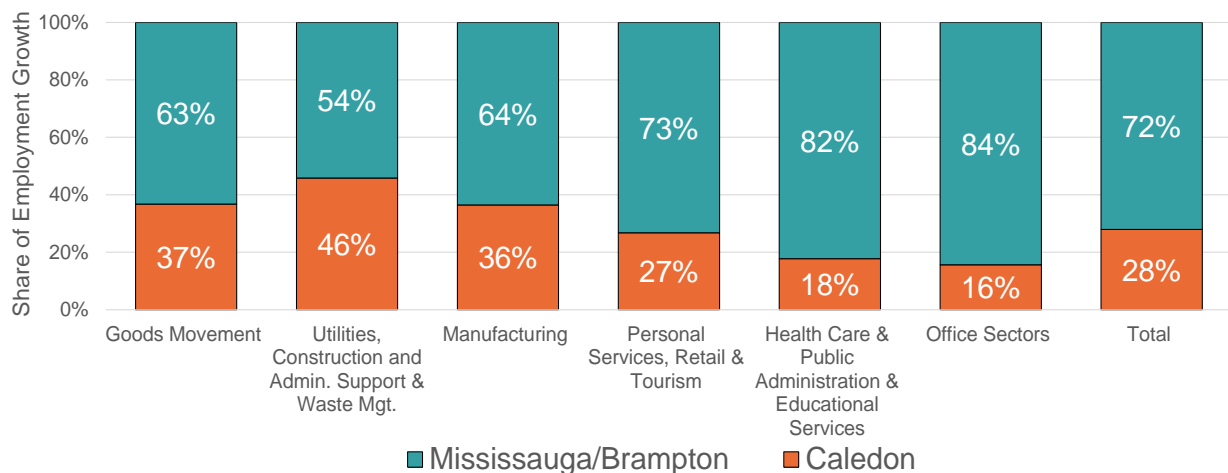


Figure B-2
Region of Peel
Employment Forecast Shares by Sectors, 2021 to 2051



Source: Watson & Associates Economists Ltd., based on the Region of Peel M.C.R. 2051 forecasts.



Figure B-3
Town of Caledon
Growth Sectors Concentration in Caledon

Utilities and Construction:

NAICS 237 - Heavy and Civil Engineering Construction
NAICS 238 - Specialty Trade Contractors

Manufacturing:

NAICS 311 - Food Manufacturing
NAICS 326 - Plastics and Rubber Products Manufacturing

Goods Movement:

NAICS 484 - Truck Transportation
NAICS 454 - Non-Store Retailers (e.g., Amazon)
NAICS 488 - Support Activities for Transportation
NAICS 493 - Warehousing and Storage

Notes: Sub-sectors in Caledon are considered concentrated with an employment base of 300 or larger and have a Location Quotient greater than 1.75. Provincial growth benchmark based on business establishment formation (number of new businesses) and employment growth rate.

Source: Based on Statistics Canada, Place of Work Employment data, 2016; and Statistics Canada Business Patterns Data, 2011 and 2019.



Figure B-4a
Town of Caledon
Manufacturing Employment by Sub-Sectors, 2016

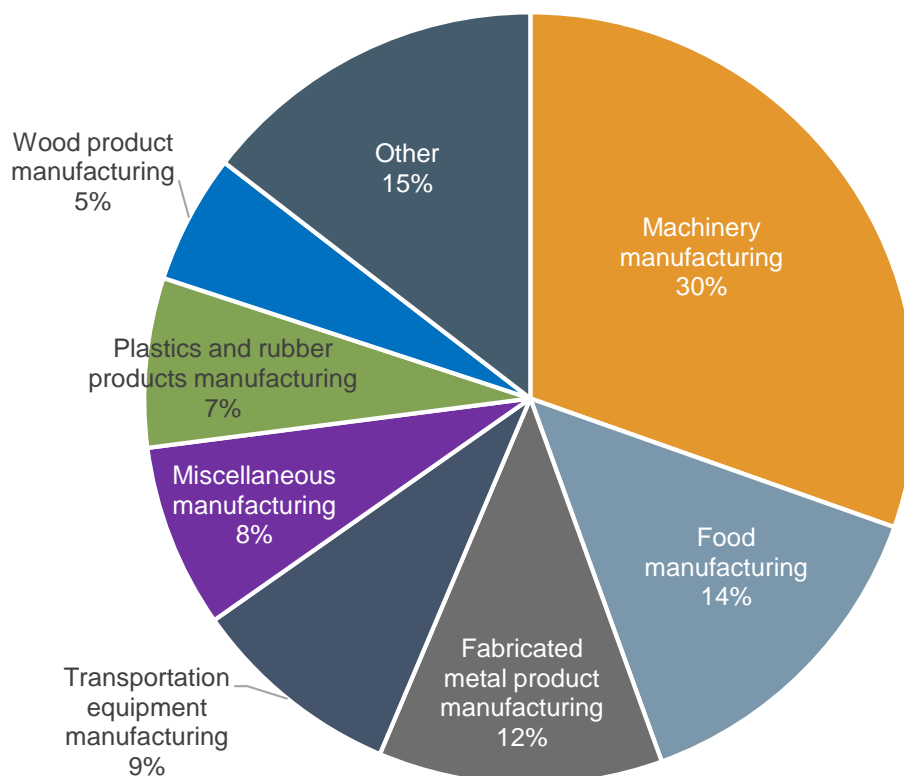




Figure B-4b
Town of Caledon
Goods Movement Employment by Sub-Sector, 2016

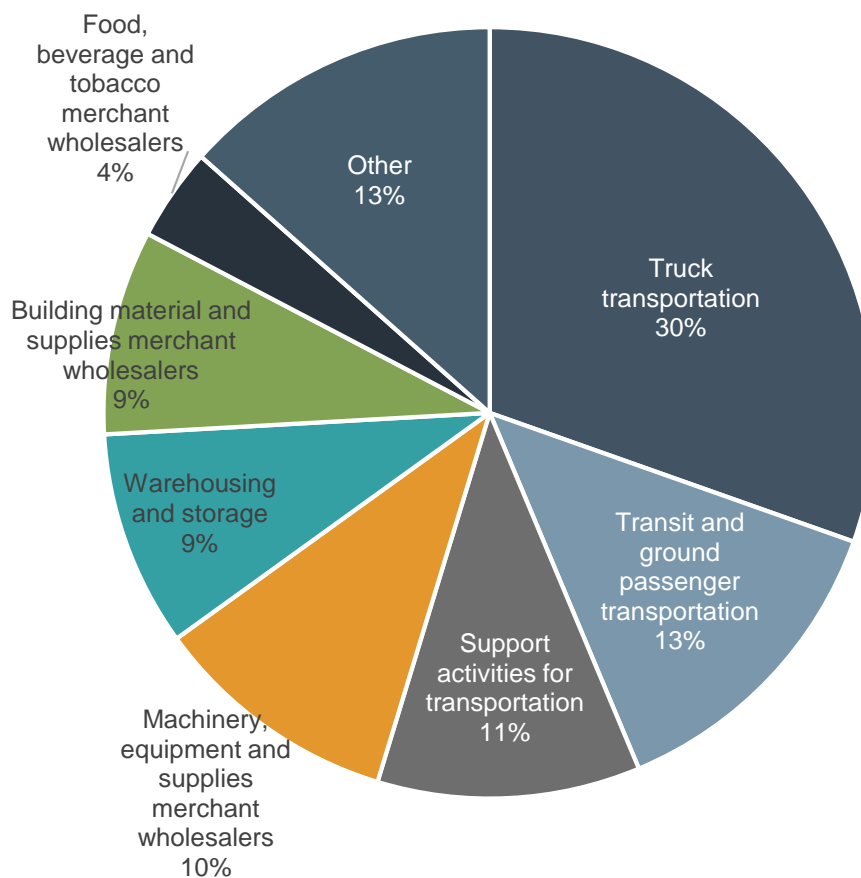
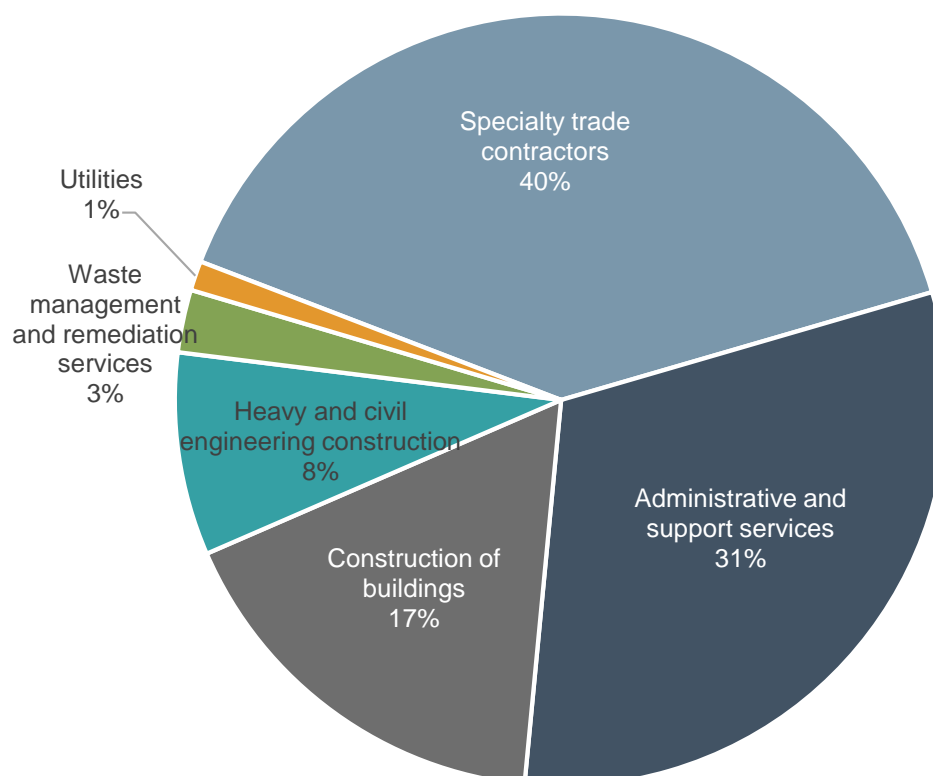




Figure B-4c
Town of Caledon
Utilities, Construction and Administrative Support & Waste Management
Employment by Sub-Sector, 2016



Source: 2016 data from Statistics Canada Place of Work data summarized by Watson & Associates Economists Ltd., 2021.



Figure B-5
Town of Caledon
Employment Area Forecast by Type
on Vacant Designated Employment Area Lands and
Settlement Area Boundary Expansion Lands, 2021 to 2051

Sector		Employment Growth: Employment Area, 2021-2051	Density (jobs/gross ha)	Land Demand ha (gross)	Annual Absorption, ha (gross)	
Major Office		A	7,400	84	88	3
Employment-Supportive Uses		B	3,400	50	69	2
Employment Lands Employment						
Employment Lands Employment by Use	Multi-Tenant Industrial/Flex-Office	C	7,100	41	175	6
	Manufacturing Buildings	D	11,300	35	328	11
	Goods Movement Buildings	E	10,200	14	756	25
	Utilities, Construction & Other Buildings	F	5,200	14	382	13
Employment Lands Employment		G = C + D + E + F	33,800	21	1,640	55
Employment Area Total on Vacant and Settlement Area Boundary Expansion Lands ^[1]		H = A + B + G	44,600	24.8	1, 797	60

^[1] Employment Area Total based on Region of Peel, Land Needs Assessment Report, August 19, 2021 and addendum to the L.N.A. received by the Town of Caledon. Assumes G.T.A. West Corridor.

Note: Development on Settlement Area Boundary Expansion lands (1,530 ha and 38,000 employees) and designated vacant Employment Area lands.

Source: Prepared by Watson & Associates Economists Ltd. based on Region of Peel M.C.R. 2051 forecasts. Breakdown by sector is a forecast by Watson & Associates Economists Ltd.



Figure B-6
Town of Caledon
Employment Area Forecast by Proposed Designation
on Vacant Designated Employment Area Lands and
Settlement Area Boundary Expansion Lands, 2021 to 2051

Goods Movement District	Total	Goods Movement Buildings	Manufacturing	Other Industrial	Flex & Multi-Tenant Industrial/Office	Major Office	Employment Supportive Uses
Employment	9,700	6,400	1,400	400	800	500	200
Employment Share	100%	66%	14%	4%	8%	5%	2%
Density	16	13	35	10	41	70	40
Land Area	602	490	40	40	20	7	5

General Employment Area	Total	Goods Movement Buildings	Manufacturing	Other Industrial	Flex & Multi-Tenant Industrial/Office	Major Office	Employment Supportive Uses
Employment	16,700	2,600	7,300	4,200	2,300	0	300
Employment Share	100%	16%	44%	25%	14%	0%	2%
Density	21	14	35	12	40	75	40
Land Area	809	190	210	344	58	0	8

Knowledge & Innovation Employment Area	Total	Goods Movement Buildings	Manufacturing	Other Industrial	Flex & Multi-Tenant Industrial/Office	Major Office	Employment Supportive Uses
Employment	5,200	0	0	0	700	4,000	500
Employment Share	100%	0%	0%	0%	13%	77%	10%
Density	77	20	40	20	60	85	55
Land Area	68	0	0	0	12	47	9

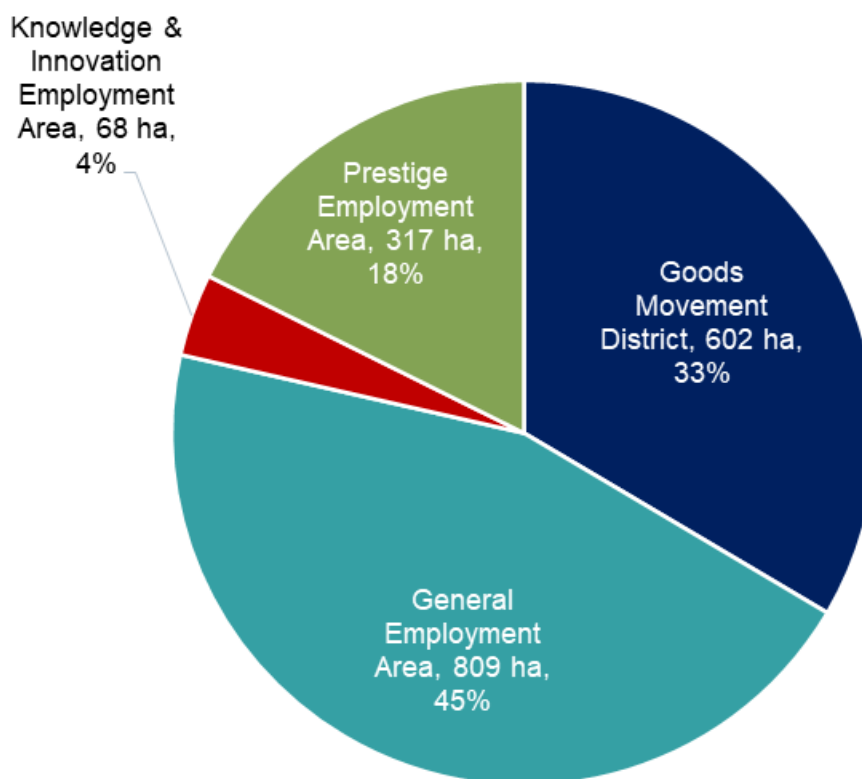
Prestige Employment Area	Total	Goods Movement Buildings	Manufacturing	Other Industrial	Flex & Multi-Tenant Industrial/Office	Major Office	Employment Supportive Uses
Employment	13,000	1,200	2,600	600	3,300	2,900	2,400
Employment Share	100%	9%	20%	5%	25%	22%	18%
Density	41	23	38	20	40	85	50
Land Area	317	52	69	30	84	34	48

Total Employment	Total	Goods Movement Buildings	Manufacturing	Other Industrial	Flex & Multi-Tenant Industrial/Office	Major Office	Employment Supportive Uses
Employment	44,600	10,200	11,300	5,200	7,100	7,400	3,400
Employment Share	100%	23%	25%	12%	16%	17%	8%
Density	24.8	14	35	13	41	84	49
Land Area	1,797	732	320	414	172	88	70

Source: Watson & Associates Economists Ltd. based on Peel Region M.C.R. Land Needs.



Figure B-6
Town of Caledon
Employment Area Forecast by Proposed Designation
on Vacant Designated Employment Area Lands and
Settlement Area Boundary Expansion Lands, 2021 to 2051



Source: Watson & Associates Economists Ltd.



Appendix C

Employment Area Vacant Land Supply



Appendix C: Employment Area Land Supply

Figure C-1
Town of Caledon
Employment Areas
Designated Employment Area Lands as of Mid-2020

Status	Land Area, ha	Share (%)
Developed	811	73%
Residential Use	24	2%
Vacant		
Development Anticipated (Approved/Proposed)	77	7%
No Application	122	11%
Total Vacant	199	18%
Servicing Issues/GTA West Protection Area	72	6%
Total Designated	1,106	100%

Source: Watson & Associates Economists Ltd. Based on discussions with Town of Caledon staff.

Figure C-2
Town of Caledon
Employment Areas
Vacant Designated Employment Area Lands by Settlement Area

Status	Land Area, ha	Share (%)
Bolton	89	45%
Mayfield West	49	25%
Tullamore	49	24%
Sandhill	8	4%
Victoria	4	2%
Total	199	100%

Source: Watson & Associates Economists Ltd., based on discussions with Town of Caledon staff.

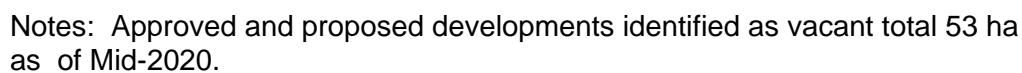
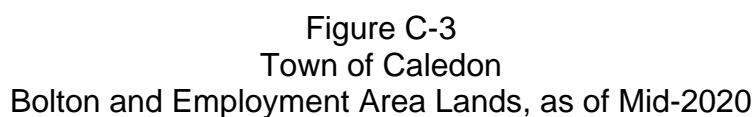




Figure C-4
Town of Caledon
Mayfield West and Employment Area Lands, as of Mid-2020

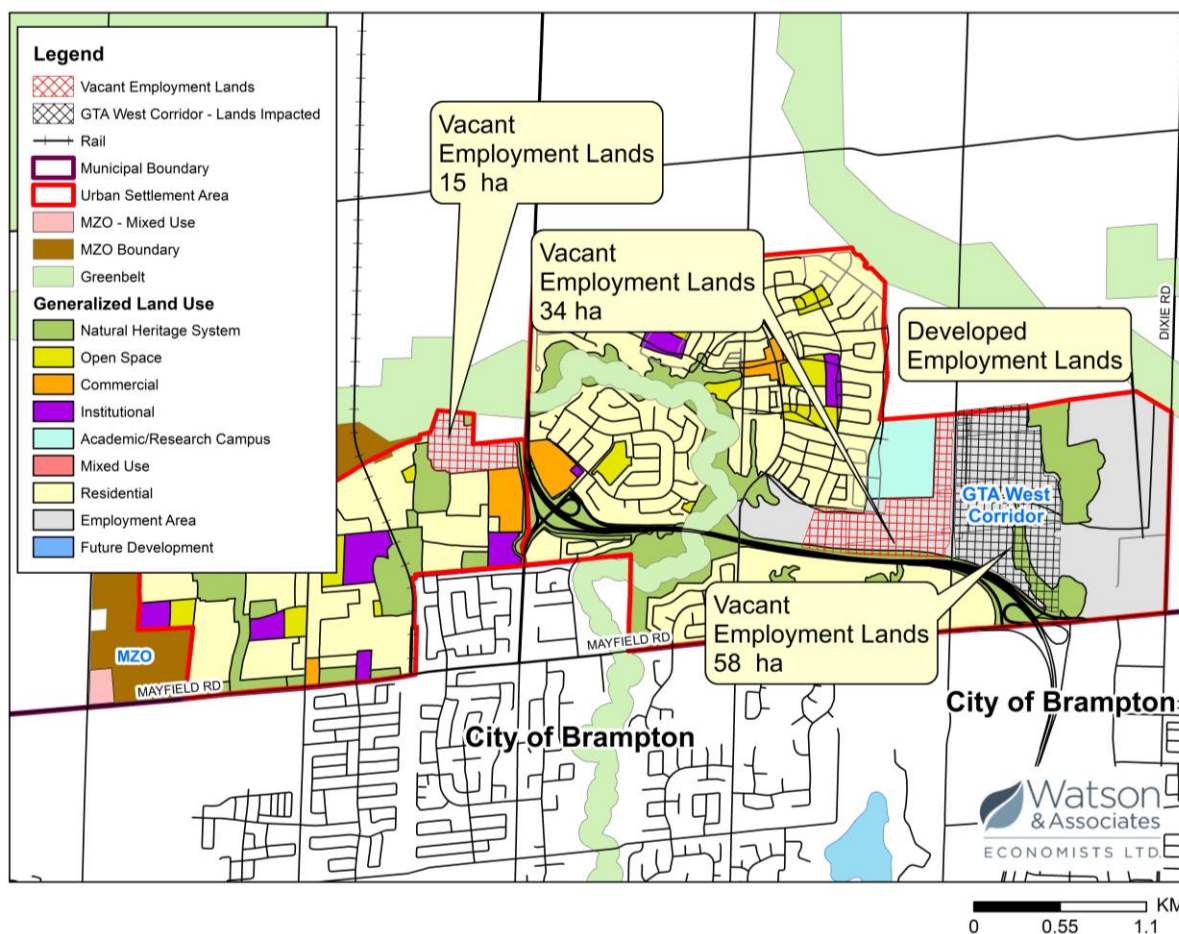




Figure C-5
Town of Caledon
Tullamore Employment Area Lands, as of Mid-2020

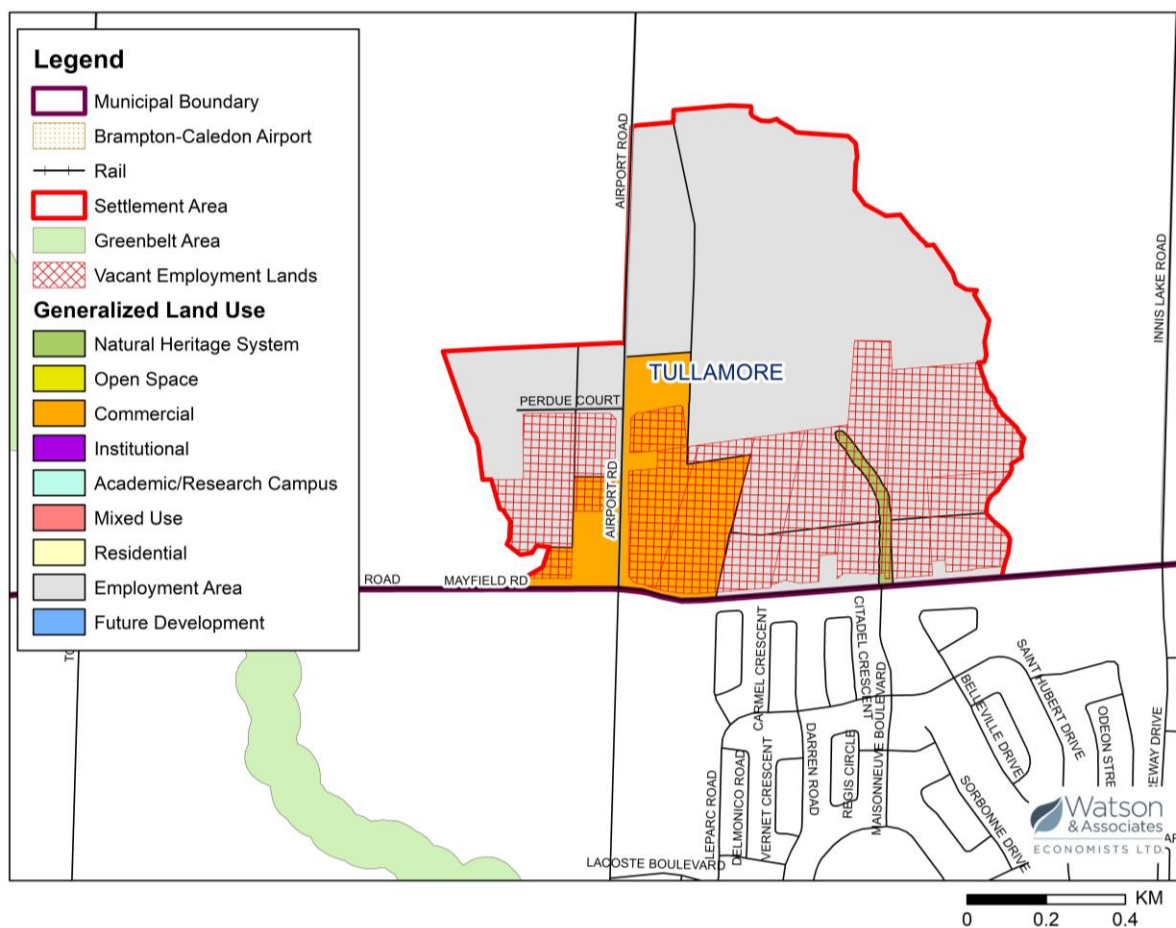




Figure C-6
Town of Caledon
Victoria Employment Area, as of Mid-2020

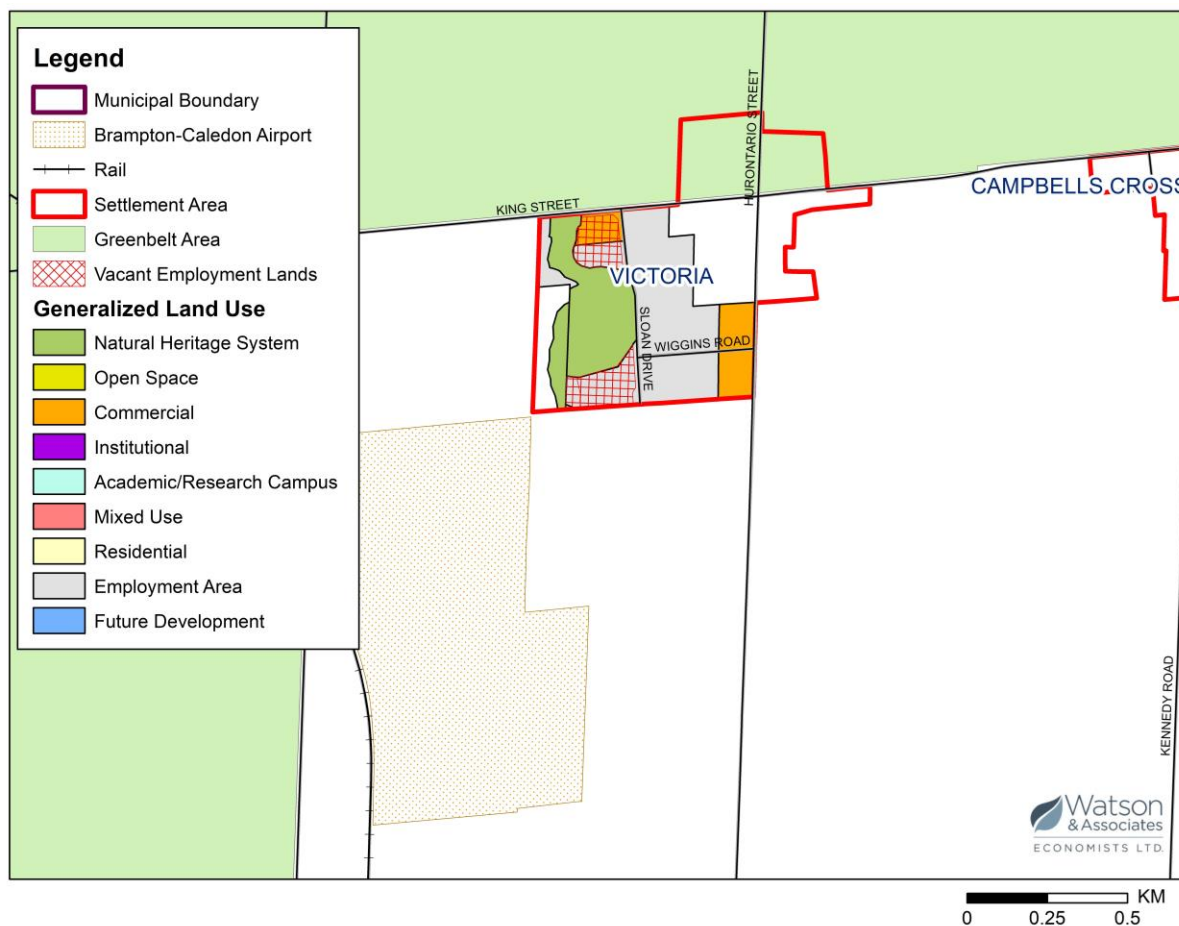
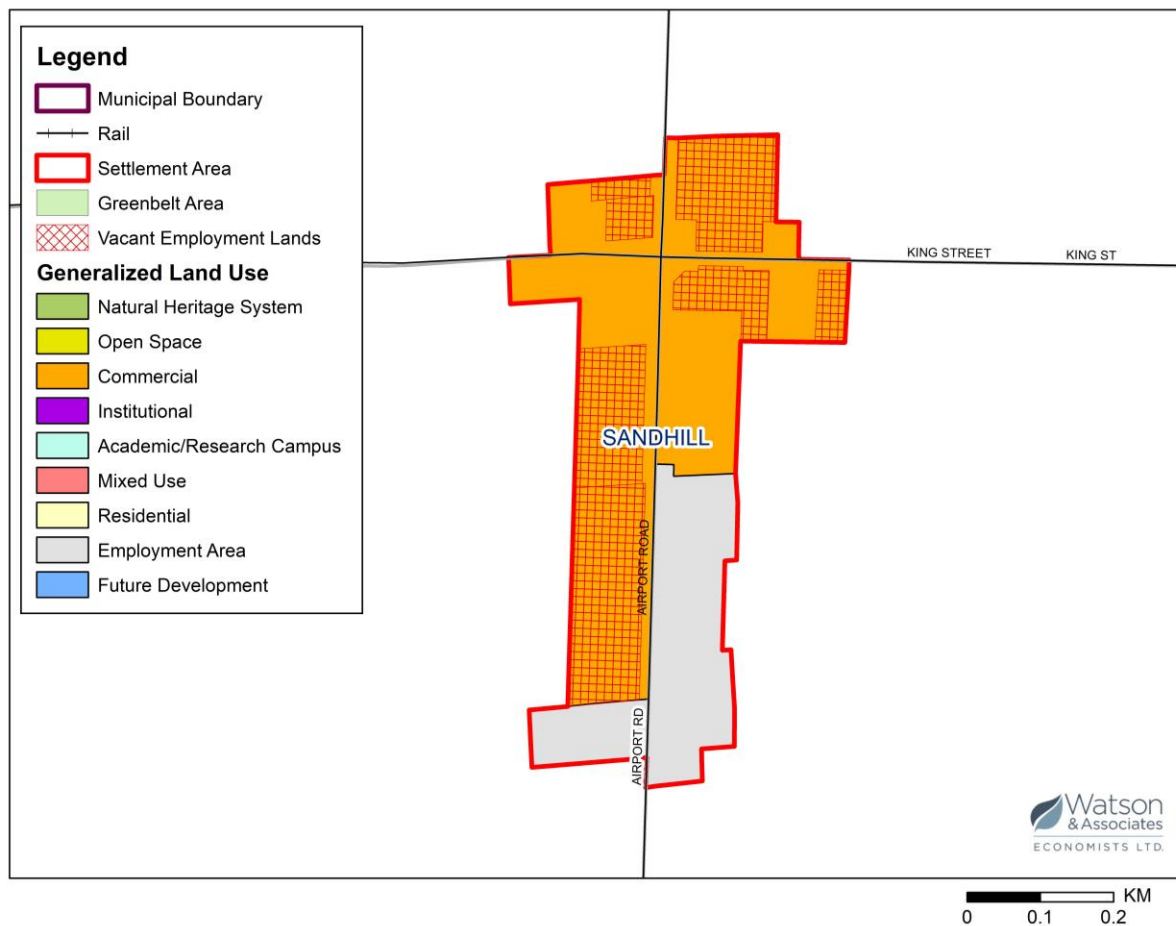




Figure C-7
Town of Caledon
Sandhill Employment Area, as of Mid-2020





Appendix D

Built Commercial Space Inventory & Commercial Demand Forecast



Appendix D: Built Commercial Space Inventory

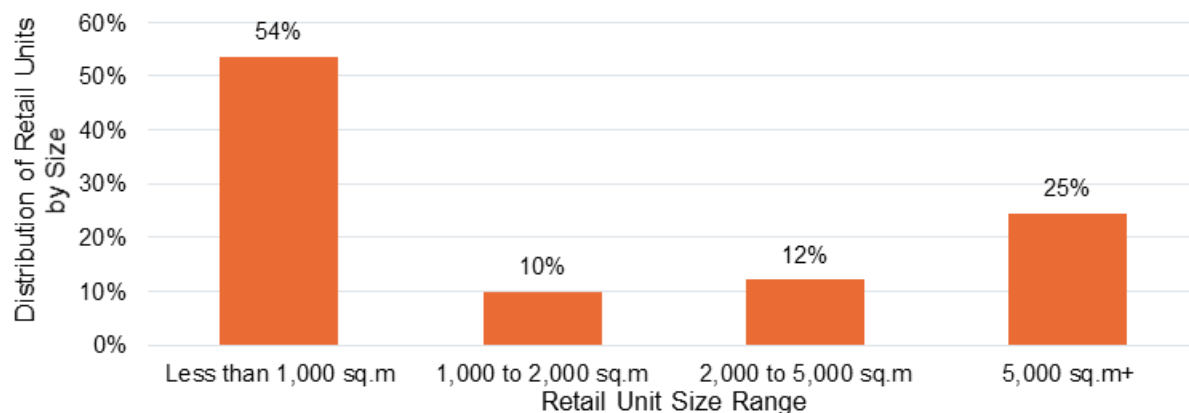
Figure D-1
Town of Caledon
Occupied Commercial Built Space, Gross Leasable Area
by Settlement Area, Mid-2020

Settlement Areas	Sq.ft.	Sq.m
Bolton	1,477,000	137,200
Villages	160,000	14,900
Caledon East	108,000	10,000
Mayfield West	81,000	7,500
Hamlets & Remaining Rural	56,000	5,200
Victoria	40,000	3,700
Tullamore	11,000	1,000
Total	1,933,000	179,500

Villages	Sq.ft.	Sq.m
Alton	69,000	6,400
Cheltenham	4,000	400
Inglewood	11,000	1,000
Mono Mills	15,000	1,400
Palgrave	11,000	1,000
Caledon Village	50,000	4,600
Villages	160,000	14,900

Source: Watson & Associates Economists Ltd.

Figure D-2
Town of Caledon
Occupied Commercial Built Space by Retail Unit Size Range, Mid-2020



Source: Watson & Associates Economists Ltd.



Figure D-3
Town of Caledon
Occupied Retail and Commercial Service Built Space by Retail Category and
Retail and Commercial Service Space Per Capita, Mid-2020

Retail Category	Gross Leasable Area, Sq.ft.	Gross Leasable Area, Sq.m	Sq.ft. Per Capita	Sq.m Per Capita
Beer, Wine & Liquor	23,000	2,100	0.3	0.03
Bank Branches	36,000	3,300	0.5	0.04
Medical/Health Services	52,000	4,800	0.7	0.06
Health & Personal Care Stores	53,000	4,900	0.7	0.06
Services - Finance, Insurance, Real Estate & Legal	63,000	5,900	0.8	0.07
Accommodations	129,000	12,000	1.6	0.15
Personal Services	195,000	18,100	2.4	0.23
Food Store Retail	217,000	20,200	2.7	0.25
Automotive	224,000	20,800	2.8	0.26
Food Services	243,000	22,600	3.0	0.28
Non-Food Store - Comparison-Based Retail	696,000	64,700	8.7	0.81
Total	1,931,000	179,400	25.3	2.24

Notes: May not add up precisely when compared to other commercial figures due to rounding.

In downtown areas, includes only ground floor retail.

Purpose-built retail buildings only (excludes office buildings).

Excludes commercial uses in Employment Areas.

Source: Watson & Associates Economists Ltd.



Figure D-4
Town of Caledon

Urban Areas (Settlement Area Boundary Expansion Areas, Bolton, Mayfield West and Caledon East)
Forecast Retail and Commercial Service Gross Leasable Area. Space and
Employment Demand, 2021 to 2051

Retail Category	Urban Area Retail & Commercial Service Space (sq.m)	Urban Area Retail & Commercial Service Space (sq.ft.)	Share (%)	Urban Area Per Capita Retail & Commercial Service Space (sq.m)	Floor Space Per Worker (sq.m)	Estimated Urban Commercial Area Employment Growth
Beer, Wine & Liquor	1,900	20,000	0.4%	0.01	46	40
Bank Branches	6,400	68,000	1.4%	0.03	30	210
Medical/Health Services	18,700	199,000	4.0%	0.09	33	570
Health & Personal Care Stores	22,200	236,000	4.7%	0.10	33	670
Services - Finance, Insurance, Real Estate & Legal	21,800	232,000	4.6%	0.10	28	770
Accommodations	44,700	475,000	9.4%	0.21	372	120
Personal Services	60,600	644,000	12.8%	0.28	37	1,610
Food Store Retail	77,800	827,000	16.4%	0.36	42	1,840
Automotive	24,100	256,000	5.1%	0.11	65	370
Food Services	78,400	833,000	16.6%	0.36	37	2,080
Non-Food Store - Comparison- Based Retail	116,400	1,237,000	24.6%	0.54	56	2,060
Total	472,900	5,027,000	100.0%	2.2	46	10,300

Notes: Employment excludes work at home employment.

Excludes anticipated commercial growth in Rural Area and Employment Areas.

Source: Watson & Associates Economists Ltd.



Figure D-5
Town of Caledon
Urban Areas (Settlement Area Boundary Expansion Areas, Bolton, Mayfield West and
Caledon East)
Community Area Employment, 2021 to 2051

Community Area Employment	Employment, 2021 to 2051
Major Office	1,800
Mixed-Use/Other Office	6,900
Residential Areas & Work at Home	11,500
Commercial Areas	10,300
Institutional Sites	7,800
Community Area Employment	38,300

Note: Refer to Figure A-5 for breakdown of Town-wide employment.

Source: Watson & Associates Economists Ltd. Total Community Area employment based on Region of Peel M.C.R. 2051 forecasts, September 2021.



Appendix E

Commercial and Institutional Land Supply



Figure E-2
Town of Caledon
Caledon East
Commercial and Institutional Lands, Mid-2020





Figure E-3
Town of Caledon
Downtown Bolton Core
Commercial and Institutional Lands, Mid-2020

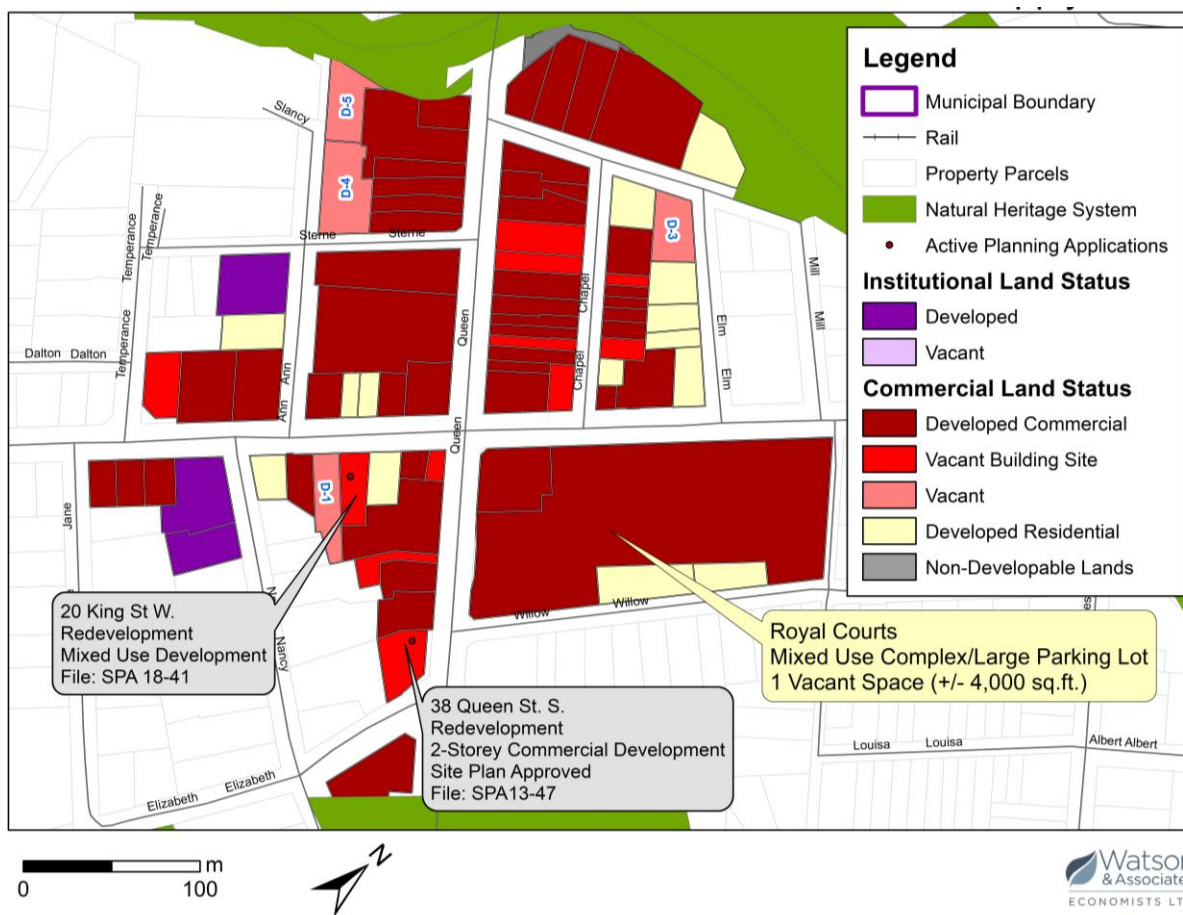




Figure E-4
Town of Caledon
Bolton - Highway 50 South – Area 1
Commercial and Institutional Lands, Mid-2020

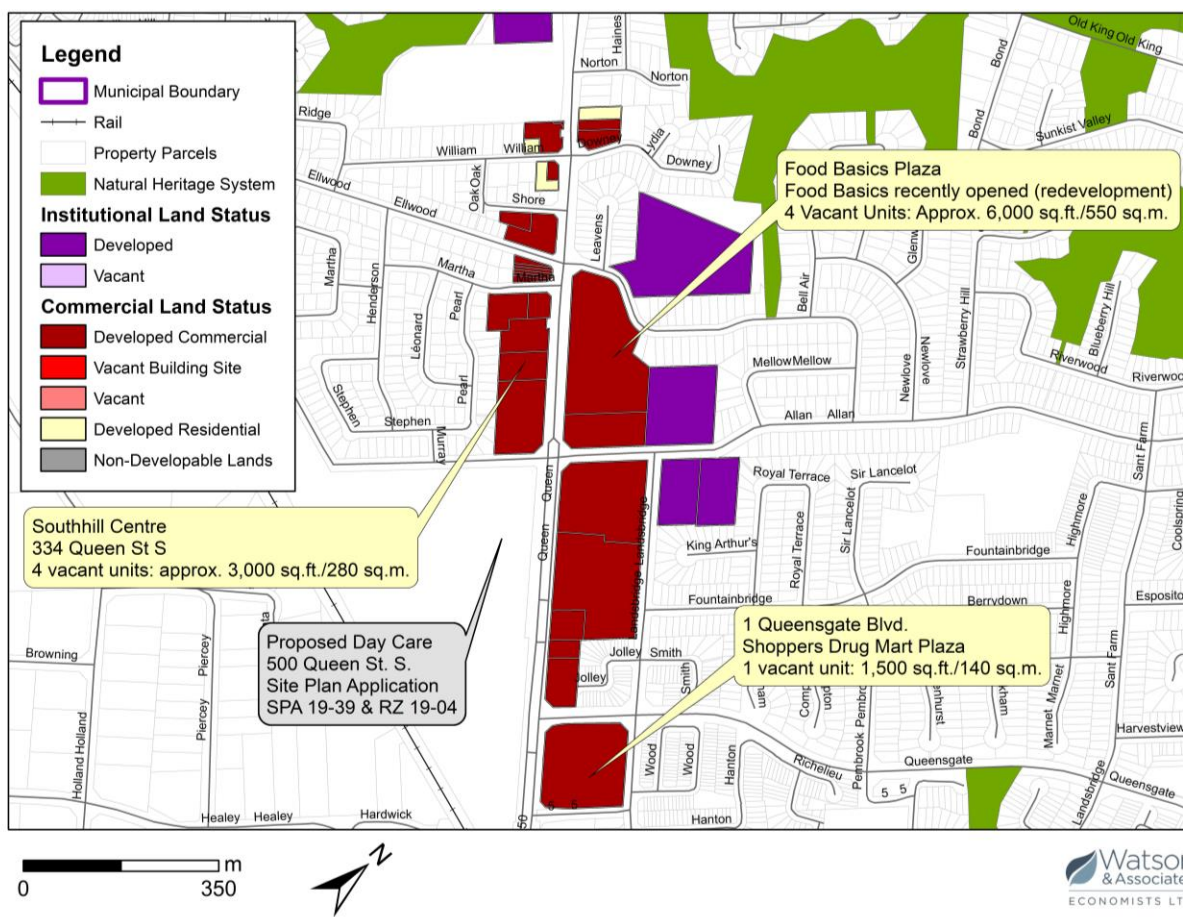




Figure E-5
Town of Caledon
Bolton- Highway 50 South – Area 2
Commercial and Institutional Lands, Mid-2020

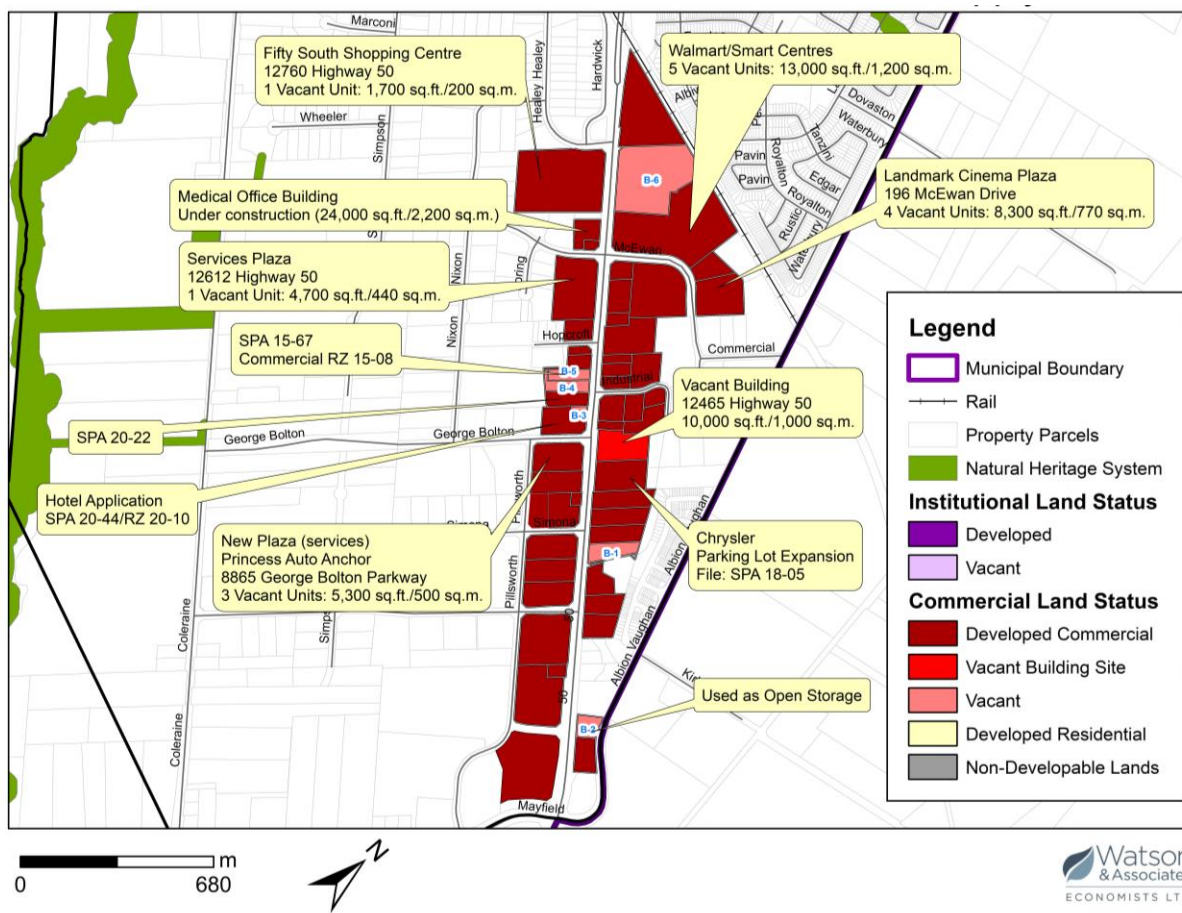




Figure E-6
Town of Caledon
Caledon Village
Commercial and Institutional Lands, Mid-2020



