



Agenda published December 19, 2025

Addendum published January 9, 2026

Date: January 12, 2026
Time: 9:30 am
Location: Council Chambers, City Hall, second floor

Pages

1. Call to Order

2. Land Acknowledgement

Burlington as we know it today is rich in history and modern traditions of many First Nations and the Métis. From the Anishinaabeg to the Haudenosaunee, and the Métis – our lands spanning from Lake Ontario to the Niagara Escarpment are steeped in Indigenous history.

The territory is mutually covered by the Dish with One Spoon Wampum Belt Covenant, an agreement between the Iroquois Confederacy, the Ojibway and other allied Nations to peaceably share and care for the resources around the Great Lakes.

We acknowledge that the land on which we gather is part of the Treaty Lands and Territory of the Mississaugas of the Credit.

3. Approval of the Agenda

4. Declarations of Interest

5. Presentations

6. Delegations

Standing committee and City Council meetings are held at city hall, 426 Brant St. Requests to speak at this meeting can be made by completing the online delegation registration form at www.burlington.ca/delegate, by submitting a written request by email to Legislative Services at clerks@burlington.ca or by phoning 905-335-7777, ext. 7481 by noon the Friday before the meeting date.

If you do not wish to speak, but would like to submit your comments in writing, please email your comments to clerks@burlington.ca. Written correspondence will be circulated to committee members.

7. Consent Items

Reports of a routine nature, which are not expected to require discussion and/or debate. Staff may not be in attendance to respond to questions on items contained in the Consent Agenda.

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|-----|---|---------|
| 7.1 | Single source procurement – fire service predictive analytics modeling software (CSS-03-26) (CCS) | 1 - 6 |
| | <p>Approve the City of Burlington to single source a predictive analytics and deployment modelling software solution with Darkhorse Emergency Corp., contingent upon the completion of a Threat Risk Assessment, Privacy Impact Assessment, and Technical Architecture review as outlined in community services report CSS-03-26; and</p> <p>Authorize the Manager of Procurement Services to issue a purchase order and sign any associated agreements with the vendor named above, in a form satisfactory to the Commissioner, Legal and Legislative Services/City Solicitor.</p> | |
| 7.2 | Delegated Authority By-law Amendments (LLS-03-26) (CCS) | 7 - 13 |
| | <p>Approve the proposed delegations of authority provided in legislative services report LLS-03-26 regarding Delegated Authority By-law Amendments to Schedule H, and inclusion of a new Schedule L; and</p> <p>Enact a by-law substantially in the form attached as Appendix A to legislative services report LLS-03-26, being a by-law to amend By-law 71-2023, a by-law to delegate approvals to staff.</p> | |
| 7.3 | Appointments to the Burlington School Traffic Safety and Mobility Advisory Committee (LLS-04-26) (CCS) | 14 - 17 |
| | <p>Approve the appointments to the Burlington School Traffic Safety and Mobility Advisory Committee, as contained in confidential Appendix A to legislative services report LLS-04-26; and</p> <p>Publish the appointees' names following approval by Council at their meeting held January 27, 2026.</p> | |

8. Community and Corporate Services

- 8.1 Appointment of Mayor to Burlington Economic Development and Tourism Board (MO-01-26) 18 - 21

Appoint the Mayor to the Burlington Economic Development and Tourism (BEDT) board for a term to be determined following the BEDT 2026 AGM, but no longer than the current term of office as outlined in office of the mayor report MO-01-26.

- 8.2 Motion Memorandum regarding amendments to Procedure By-law (COW-02-26) 22 - 24

Direct the City Clerk/Director of Legislative Services to report back to Committee of the Whole with the following proposed amendments to Burlington Procedure By-law 59-2024 for consideration:

“Each member will have a maximum of three minutes to speak on a motion and will be given the option of an additional maximum three minutes after every member has been allowed to speak. This time cannot be accumulated and added to the additional commentary period. There will be a maximum of two commenting periods per member and any additional requests for commentary will only be provided to members through the passing of a two-thirds vote.”; and

“Each member will have the opportunity to ask two questions, to a maximum of one minute per question on a motion and will be given the opportunity to ask an additional two questions after every member has been allowed to ask questions. There is no limit to the number of questions each member can ask providing that the above guidelines are adhered to and the questions are concise, directly related to the agenda item being discussed and that question period is not used as an opportunity to comment or express opinions of the matter being discussed.”; and

“The management of both question and commenting periods remains within the authority and purview of the Chair of the Meeting”.

- 8.3 Motion Memorandum regarding correspondence from the Burlington Cycling Advisory Committee on Vision Zero Program (COW-01-26) 25 - 29

Receive for information the attached correspondence from the Cycling Advisory Committee regarding the Vision Zero Program.

9. Confidential Items and Closed Meeting

Confidential reports may require a closed meeting in accordance with the Municipal Act, 2001. Meeting attendees may be required to leave during the discussion.

- 9.1 Confidential Appendix A to legislative services report LLS-04-26 regarding appointments to the Burlington School Traffic Safety and Mobility Committee (LLS-04-26)

Pursuant to Section 239(2)(b) personal matters about an identifiable individual, including municipal or local board employees

10. Rise and Report

11. Public Works

12. Growth Management

13. Statutory Public Meetings

Statutory Public Meeting will be discussed at 9:30 a.m. on Tuesday, January 13, 2026

- 13.1 City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area 30 - 335

Direct the Director of Community Planning to consider Council, agency, development partners, and community feedback received as part of this statutory public meeting prior to bringing forward a staff report recommending approval of Official Plan Amendment No. 7 and Burlington Regional Official Plan (ROPA) Amendment No.1.

- a. *Staff presentation regarding City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area (DGM-01-26)* 336 - 345
- b. *Mike Corker, Halton Condo Corp 86/ MTechHub regarding City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area (DGM-01-26)* 346 - 364
- c. *Glenn Wellings, Wellings Planning Consultants Inc, regarding City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area (DGM-01-26)*
- d. *Carl Mandel regarding City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area (DGM-01-26)*
- e. *Correspondence from T. J. Cieciura, Design Plan Services Inc, regarding City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area (DGM-01-26)* 365 - 369

<i>f.</i>	<i>Correspondence from Emshih Developments Inc., regarding City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area (DGM-01-26)</i>	<i>370 - 371</i>
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14. Information Items

14.1	Legislative Services forecast for standing committee reports (COW-03-26)	372 - 372
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15. Staff Remarks

16. Committee Remarks

17. Adjournment

SUBJECT: Single source procurement – fire service predictive analytics modeling software
TO: Committee of the Whole
FROM: Community Services
Fire

Report Number: CSS-03-26

Wards Affected: All

Date to Committee: January 12, 2026

Date to Council: January 27, 2026

Recommendation

Approve the City of Burlington to single source a predictive analytics and deployment modelling software solution with Darkhorse Emergency Corp., contingent upon the completion of a Threat Risk Assessment, Privacy Impact Assessment, and Technical Architecture review as outlined in community services report CSS-03-26; and

Authorize the Manager of Procurement Services to issue a purchase order and sign any associated agreements with the vendor named above, in a form satisfactory to the Commissioner, Legal and Legislative Services/City Solicitor.

Executive Summary

Burlington Fire requires specialized cloud-based data analytics and predictive modeling solution to support evidence informed decision making, strengthen strategic planning and enhance community risk reduction. As Burlington continues to intensify, advanced modeling tools are needed to forecast future service demand, evaluate deployment models, and align fire service resources with emerging risks and development patterns.

Under O. Reg 373/18 Burlington Fire must complete its next Community Risk Assessment in 2027. This assessment must be evidence based, data informed, and defensible. Darkhorse Emergency provides the analytical capability needed to meet these Provincial expectations. Implementing the platform now provides the necessary runway for data collection, model

development, validation, and integration of risk findings into station deployment, staffing, and capital planning. Deferring implementation to 2027 would leave insufficient time to meet legislative requirements and to produce a comprehensive assessment that reflects Burlington's growth projections.

Darkhorse Emergency was identified as the only vendor offering a commercially available analytics platform that is already in active use by several large Ontario Fire Services, including Brampton Fire and Emergency Services, Hamilton Fire Department, Mississauga Fire and Emergency Services, and Toronto Fire Services.

The platform has been used by these departments to support Community Risk Assessment work, station location analysis, and broader deployment planning. While other vendors provide general fire and EMS analytics tools, Darkhorse is uniquely aligned with Burlington's needs due to its Canadian client base, demonstrated application in Ontario's legislative and operational context, and its ability to integrate municipal growth and intensification data into deployment scenarios.

Recommendation Report

Background

The City's Procurement By-law 04-2022 requires Council approval for single source purchases with a value of **\$100,000 or more**. The proposed five-year contract with Darkhorse Emergency exceeds this threshold.

Burlington Fire requires advanced analytics to support station deployment modelling, risk-based growth planning, and performance monitoring. Today's methods cannot forecast growth, evaluate travel time impacts, identify emerging risk clusters, or model alternative deployment scenarios. As a result, Burlington Fire is unable to produce the type of predictive, evidence informed analysis now expected under [O. Reg 378/18 Community Risk Assessment](#).

The current state also limits Burlington Fire's ability to quantify the operational impacts of intensification. Burlington is experiencing significant mid-rise and high-rise development, increased traffic congestion, and changing population densities. Burlington Fire does not have a platform that can quantify how these changes affect response performance or what interventions are required to maintain service reliability over the next five to ten years. This creates risk that decisions regarding stations, staffing, and apparatus will be based on historical assumptions rather than validated forecasting.

Darkhorse Emergency offers a specialized Software as a Service (SaaS) platform designed for Canadian fire services. It integrates predictive modeling, diagnostics, geographic risk analysis, and deployment tools that allow Burlington Fire to understand current performance and forecast the impact of future growth. This capability is essential to prepare the 2027 Community Risk Assessment and to support transparent recommendations to Council.

Analysis

Business Need

- Burlington Fire requires a solution that goes beyond traditional reporting to provide forward-looking insights, ensuring the department is prepared for future growth, population increases, and shifting community risk.
- Predictive modeling is critical to station location planning, apparatus deployment, and future capital investment decisions.

Vendor Capability

- Darkhorse Emergency is the only provider offering a fire specific analytics platform that incorporates municipal growth data, response modelling, [Community Risk Assessment \(O. Reg 378/18\)](#) standards, and performance diagnostics in a single integrated tool.
- Their platform has been successfully implemented in large urban GTA fire services, demonstrating operational benefits and rapid deployment capability.
- The subscription includes access to a dedicated fire data analyst, providing specialized internal support without requiring additional staff.
- The platform produces validated predictive scenarios, identifies emerging risk clusters, and quantifies the impact of service changes on emergency turnout and response times.

Implementation & Risk Mitigation

- The platform is fully cloud-based, eliminating the need for City-managed infrastructure and ensuring continuous vendor-monitored uptime.
- Initial implementation can be completed within three months, aligning with Burlington Fire's strategic timelines.
- Unlimited user licensing ensures scalability without incremental cost.
- Leveraging the same platform as neighbouring municipalities reduces risk by aligning with Fire Service best practices and leveraging lessons learned.

Considerations:

- Five-year contract term (2026–2030), with automatic renewal unless notice is provided.
- Annual subscription fee subject to CPI-based inflation adjustment.
- Reliance on one vendor is mitigated through standard termination and data return provisions.

Alternative Options Considered:

Competitive Procurement

To ensure legislated timelines are met, the Fire Department will proceed without conducting a competitive procurement process.

Internal Development

While the potential for an internally developed solution has been identified, additional evaluation is necessary to confirm whether the specialized modelling required for fire service deployment, travel time forecasting, coverage analysis, and Community Risk Assessment can be accommodated within current City IT and analytics capabilities. These functions typically depend on validated datasets, complex algorithms, and domain-specific expertise—

requirements that may exceed current internal resources and warrant a detailed technical review by the City's Architecture Review Board.

Given these unknowns, an internally built platform would likely involve a longer development horizon, dedicated software engineering capacity, specialized subject matter input, and ongoing maintenance commitments that have not yet been evaluated.

Darkhorse offers a ready to deploy solution that has already been implemented in several Ontario fire services and provides immediate access to validated methodologies, modelling tools, and dedicated analytical support while the City completes its formal review processes.

Other Commercial Analytics Platforms

General analytics tools do not provide fire specific modelling, validated deployment algorithms, or integration with fire response data, which are necessary to support strategic decisions on station locations, staffing models, and capital planning. Darkhorse Emergency is purpose built to meet these operational needs and allows Burlington Fire to move directly into analysis without the delays associated with adapting a non-fire specific product.

Recommendation Details

This project was approved in the 2026 capital budget, recognizing the need for Burlington Fire to modernize its analytical capabilities and shift toward evidence informed planning. Capital funds were allocated specifically for the acquisition of an advanced fire analytics platform to support growth modelling, station deployment analysis, and preparation of the 2027 Community Risk Assessment.

It is recommended that the City of Burlington:

1. Approve a single-source contract award to Darkhorse Emergency Corp., for the provision of a cloud-based advanced data analytics and predictive modeling solution.
2. Authorize staff to negotiate and execute a contract in the estimated amount of \$200,000, funded through the IT-CA-2214 - Fire Service Analytics Software capital project.

This award will ensure Burlington Fire has access to the only proven, commercially available fire analytics solution capable of meeting its current and future needs, while aligning with the [Fire Master Plan](#), [Community Risk Assessment](#), City's Horizon 2050 strategic priorities, the Corporate Compass objectives and Fire Service best practices.

Implications

Following capital funded implementation in 2026, Burlington Fire will incorporate ongoing annual subscription and support fees into the department's operating budget. These costs are estimated at approximately forty thousand dollars per year and will be subject to CPI based adjustment.

Burlington Fire has received Provincial SOLGEN NG9-1-1 grant funding that will offset a portion of the first-year subscription and implementation costs for this project. This funding stream is intended to support enhancements to NG9-1-1 readiness, emergency communications, operational capability, and data driven decision making. The approved grant reduces the immediate impact on the operating budget and enables Burlington Fire to leverage provincial support for the modernization of its analytical and deployment modeling tools.

References

N/A

Strategic Alignment

- ☒ Designing and delivering complete communities
 - ☒ Providing the best services and experiences
 - ☐ Protecting and improving the natural environment and taking action on climate change
 - ☒ Driving organizational performance
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Appendices:

N/A

Notifications:

N/A

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

SUBJECT: Delegated Authority By-law Amendments to Schedule H, and inclusion of a new Schedule L

TO: Committee of the Whole

FROM: Legal and Legislative Services
Legislative Services

Report Number: LLS-03-26

Wards Affected: All

Date to Committee: January 12, 2026

Date to Council: January 27, 2026

Recommendation

Approve the proposed delegations of authority provided in legislative services report LLS-03-26 regarding Delegated Authority By-law Amendments to Schedule H, and inclusion of a new Schedule L; and

Enact a by-law substantially in the form attached as Appendix A to legislative services report LLS-03-26, being a by-law to amend By-law 71-2023, a by-law to delegate approvals to staff.

Executive Summary

Purpose of report:

- The purpose of the report is to amend the existing delegated authority by-law to provide new authorities to delegates to increase efficiencies at the City and ensure business continuity.

Key findings:

- Amendment No. 1 to Schedule H, Roads, Parks and Forestry, is seeking authority for staff to approve agreements between the City and neighboring municipalities, government agencies or private property owners for the provision of stormwater drainage maintenance and repair.

- Amendment No. 2 to Schedule H, Roads, Parks and Forestry, is seeking authority for the Mayor and Clerk to execute agreements between the City and neighboring municipalities, government agencies or private property owners for the provision of stormwater drainage maintenance and repair.
- Amendment No. 3 is the addition of a new Schedule L, By-law Compliance, seeking authority for the Director of By-law Compliance to execute agreements between the City and neighbouring municipalities or other levels of government for the provision of Animal Shelter Services.

Implications:

- There are no financial or resource impacts associated with the proposed recommendations of this report.
- Delegating routine and low-risk decisions of council to senior management reduces administrative effort and will allow Council to focus on strategic matters.

Recommendation Report

Background

Staff seeking new or updated delegated authority provide written submissions to Legislative Services. Submissions include a description of authority sought, the delegate's position and any permitted sub-delegations, any affiliated conditions or restrictions to the authority, and the rationale for the delegated authority required. Submissions and the amending by-law to the delegated authority are prepared in consultation with Legal Counsel.

Analysis

Rationale for each amendment is provided below. In each case, the requesting area(s) provided rationale to improve existing inefficiencies, delays or impacts to customer services and/or project completion.

Amendments No. 1 & 2, Schedule H, Roads, Parks and Forestry, sections 12 & 13

Amendments No. 1 and 2 are seeking to add sections 12 and 13, immediately following section 11 of Schedule H. Amendment No. 1 will grant authority to approve agreements between the City and neighboring municipalities, government agencies or private property owners for the provision of routine stormwater drainage maintenance and repair. Amendment No. 2 will grant authority to execute agreements between the City and neighboring municipalities, government agencies or private property owners for the provision of routine stormwater drainage maintenance and repair.

Stormwater drainage systems are often complex and interconnected across municipal boundaries or through privately owned lands. Timely maintenance and repair are critical to prevent localized flooding, infrastructure damage, and environmental degradation, while acknowledging that assuming responsibility for work on assets not owned by the City introduces potential liability considerations that must be carefully managed through formalized agreements.

This delegated authority will give staff the ability to negotiate and formalize agreements with external entities (e.g., conservation authorities, utilities, provincial agencies, private landowners and adjacent municipalities), enhance collaboration and ensure cohesive management of shared stormwater systems. Staff will be given the ability to manage routine and urgent drainage matters in a timely, accountable, and cost-efficient manner, in keeping with Council's broader environmental, infrastructure, and public risk mitigation objectives.

Primary intention is to address drainage maintenance needs on privately owned segments of the major storm water network under the authority of MTO or 407 ETR.

Amendment No. 3, Schedule L By-law Compliance

Amendment No. 3 is seeking to add a new Schedule L immediately following Schedule K. Amendment No. 3 will grant authority to approve and execute memoranda of understanding and service level agreements between the City and neighbouring municipalities and other levels of government for the provision of Animal Shelter services (e.g. an agreement with the Region of Halton for the provision of emergency pet services to displaced residents during a declared emergency). The authority to approve and execute agreements allows the Director of By-law Compliance to negotiate, approve and enter into agreements, and make operational decisions for the provision of Animal Shelter services without delay.

Recommendation Details

Each amendment addresses specific inefficiencies as identified by the requesting area. Approval of these amendments as outlined above will contribute to more efficient, effective and transparent decision-making, enabling Council to focus on its strategic role.

Key Dates & Milestones

Not applicable

Implications

Delegating routine and low-risk decisions of council to senior management reduces administrative effort and will allow Council to focus on strategic matters.

References

- [By-law 71-2023](#), a by-law to delegate approvals to staff
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Strategic Alignment

- ☐ Designing and delivering complete communities
 - ☒ Providing the best services and experiences
 - ☐ Protecting and improving the natural environment and taking action on climate change
 - ☒ Driving organizational performance
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Appendices:

A. Proposed amending by-law to amend By-Law 71-2023, to delegate approvals to staff.

Draft By-laws for Approval at Council:

- Draft by-law to amend By-law 71-2023, to delegate approvals to staff.
To be enacted by Council January 27, 2026.

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

The Corporation of the City of Burlington

City of Burlington By-law XX-2026

A by-law to amend By-law 71-2023, to delegate approvals to staff

Report No: LLS-03-26

Whereas sections 8, 9 and 11 of the *Municipal Act*, S. O. 2001, c. 25, as amended (the “*Municipal Act, 2001*”), authorize The Corporation of the City of Burlington (the “City”) to pass by-laws necessary or desirable for municipal purposes, and in particular, subsection 23.1 specifies that sections 9 and 11 authorize the City to delegate its powers or duties under the *Municipal Act, 2001* or any other Act to City staff, subjects to certain restrictions; and

Whereas Council of The Corporation of the City of Burlington passed By-Law 71-2023 being the Delegated Authority By-law delegating certain approvals to staff; and

Whereas it is deemed necessary to amend Schedule H of the Delegated Authority By-law to enhance collaboration and ensure cohesive management of shared stormwater systems; and

Whereas it is deemed necessary to add Schedule L to the Delegated Authority By-law to allow the Director of By-law Compliance to approve and execute Animal Shelter service agreements with other municipalities and other levels of government to reduce operational delays; and

Whereas it is deemed necessary to amend By-law 71-2023 to reflect the addition of a Schedule L, By-law Compliance, immediately following Schedule K, in the listing of schedules throughout the By-law; and

Now therefore the Council of The Corporation of the City of Burlington hereby enacts as follows:

1. That Schedule H to By-law No. 71-2023, Roads, Parks and Forestry, be amended by adding the following new heading and new sections 12 and 13 immediately following section 11:

	Stormwater Drainage System Maintenance Agreements		
12.	Approve agreements between the City and neighbouring municipalities, government agencies or private property owners for the provision of	Director of Roads, Parks and Forestry or Director of	With content satisfactory to the Commissioner of Community Services and in a

	routine stormwater drainage maintenance and repair.	Engineering Services	form satisfactory to the Commissioner, Legal and Legislative Services.
13.	Execute agreements between the City and neighboring municipalities, government agencies or private property owners for the provision of routine stormwater drainage maintenance and repair.	Mayor and Clerk	

2. That By-law No. 71-2023 be amended by adding new Schedule L, By-law Services, immediately following Schedule K:

SCHEDULE L to By-law 71-2023

By-law Compliance

No.	Delegated Authority	Delegate	Conditions/Restrictions
1.	Approve and execute memoranda of understanding, service level agreements, and any other related agreements or documents relating to the delivery of Animal Shelter services with other municipalities or other levels of government.	Director, By-law Compliance or delegate	Subject to approval as to form by the Commissioner, Legal and Legislative Services/City Solicitor.

3. Subject to the amendments made in this By-law, in all other respects, By-law 71-2023 is hereby confirmed and remains unchanged.
4. This By-law comes into force on the date of its passing.

Passed this XX day of January, 2026

Mayor Marianne Meed Ward

City Clerk Michael de Rond

SUBJECT: Appointments to the Burlington School Traffic Safety and Mobility Advisory Committee

TO: Committee of the Whole

FROM: Legal and Legislative Services
Legislative Services

Report Number: LLS-04-26

Wards Affected: N/A

Date to Committee: January 12, 2026

Date to Council: January 27, 2026

Recommendation

Approve the appointments to the Burlington School Traffic Safety and Mobility Advisory Committee, as contained in confidential Appendix A to legislative services report LLS-04-26; and

Publish the appointees' names following approval by Council at their meeting held January 27, 2026.

Executive Summary

Purpose of report:

The purpose of this report is to provide Council with the names of individuals recommended for appointment to the Burlington School Traffic Safety and Mobility Advisory Committee to bring the membership to full complement.

Recommendation Report

Background

The City of Burlington has a variety of boards and committees that provide feedback on city projects and issues in the community. Members of the public aged 18 and older, who represent the diverse backgrounds of the community, are encouraged to take part.

The establishment of the Burlington School Traffic Safety and Mobility Committee was approved by Council on March 18, 2025, through public works report PWS-09-25. Following approval, recruitment was initiated in Spring 2025 and 5 resident members were appointed by Council on July 15, 2025 and 1 Trustee was recommended from the Halton District School Board (HDSB) and 1 Trustee was recommended from the Halton Catholic District School Board (HCDSB), for a total membership of 7 voting members. The approved Terms of Reference for the Burlington School Traffic Safety and Mobility Committee states that the composition can be up to 13 members, including 4-9 resident members appointed by Council, 1-2 Trustees from the HDSB and 1-2 Trustees from the HCDSB. Following approval and acceptance of these appointments, the committee will have 11 voting members.

The Committee commenced its meetings in September 2025, and it quickly became evident that additional members were needed to effectively carry out its mandate, which includes conducting site inspections to promote safer school environments throughout Burlington.

Legislative Services staff launched a recruitment campaign on November 17, 2025, to fill the remaining vacancies on the Burlington School Traffic Safety and Mobility Committee. The recruitment deadline was extended to December 5, 2025, to allow for more applications to be submitted. Recruitment opportunities were advertised on the City's website, the Get Involved Burlington newsletter and through social media boosts.

In accordance with the Public Appointment Policy, the recommended appointments will expire on December 31, 2026, to align with the current term of Council.

The interview panel consisted of Craig Kummer (Director of Transportation Services), Bryan Letourneau (Supervisor of School Crossing Guards), Amy Collard (Chair) and Councillor Lisa Kearns. The interviews were conducted via Zoom providing more flexibility for participation by the interview panel and applicants.

Analysis

The interview panel made their selection recommendations based on the Committee's Terms of Reference and membership composition needs as well as the applicant's knowledge of the role, relevant skills and experience, expressed dedication/commitment, time availability, and communication skills.

Recommendation Details

Following a recruitment and interview process of qualified applicants, members of the community are recommended for appointment to the Burlington School Traffic Safety & Mobility Committee.

As a member of one of the City's advisory committees, residents can actively participate in local government. Committee members play an important role in shaping city initiatives, by working with staff and the community to contribute to improving the quality of life within the City of Burlington.

Key Dates & Milestones

Regular meeting of Council on January 27, 2026 – appointment approval

Implications

Following Council approval of the recommendation, staff will advise successful and unsuccessful applicants of Council's decision. Successful applicants will participate in future committee meetings as voting members. They will be provided with an orientation session and resource materials. All members of advisory committees and boards will complete required training in the areas of AODA, Privacy, Health & Safety, Respect in the Workplace, and Code of Conduct.

Individuals who are not appointed will be advised of other City of Burlington volunteer opportunities.

References

- [PWS-09-25 Establishment of Burlington School Traffic Safety & Mobility Committee](#)
- [LLS-39-25 Appointments to the Burlington School Traffic Safety & Mobility Committee](#)
- [CL-26-21 Public Appointment Policy](#)

Strategic Alignment

- ☒ Designing and delivering complete communities
 - ☒ Providing the best services and experiences
 - ☐ Protecting and improving the natural environment and taking action on climate change
 - ☐ Driving organizational performance
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Appendices:

A. Confidential Appendix A – recommended committee appointees

Pursuant to Section 239(2)(b) personal matters about an identifiable individual, including municipal or local board employees

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

SUBJECT: Appointment of Mayor to Burlington Economic Development and Tourism Board
TO: Committee of the Whole
FROM: Office of the Mayor
N/A

Report Number: MO-01-26

Wards Affected: All

Date to Committee: January 12, 2026

Date to Council: January 27, 2026

Recommendation

Appoint the Mayor to the Burlington Economic Development and Tourism (BEDT) board for a term to be determined following the BEDT 2026 AGM, but no longer than the current term of office as outlined in office of the mayor report MO-01-26.

Executive Summary

Three City Council members - Councillor Sharman, Councillor Galbraith and Mayor Meed Ward - sit on the BEDT Board. Two are appointed by Council, and the Mayor is an invited guest of the board. Following consultation with the Integrity Commissioner, the advice received is that the Mayor be officially appointed to the board to address any potential Conflict of Interest arising from participation in an external board.

Purpose of report:

- To appoint the Mayor to the Burlington Economic Development and Tourism board.

Key findings:

- The Integrity Commissioner has advised that for purposes of avoiding Conflict of Interest arising from participation in external boards, that Council members on external boards be appointed to those positions by Council.

Implications:

- Enhances accountability, transparency and governance clarity as Council members fulfill their roles on external boards.

Recommendation Report

Background

The Mayor reached out to the Integrity Commissioner for guidance around Conflict of Interest arising from participation on an external board that may have items that come to City Council for decision-making.

The Integrity Commissioner advised that the Municipal Conflict of Interest Act contains an exemption for elected officials from a Conflict of Interest arising out of bodies to which they belong if they have been appointed to the body by Council.

Councillors Sharman and Galbraith were duly appointed by Council through Mayor's Office report MO-03-22 - Appointments to standing committees, board, committees, agencies and Deputy Mayors (December 5 & 13, 2022). Councillor Sharman was appointed as the Mayor's designate to the former Burlington Economic Development board, and Councillor Galbraith to the former Tourism board, now merged into BEDT. The Mayor was invited to participate on BEDT as a non-voting guest of the Board.

As such, the Integrity Commissioner's advice is to formally appoint the Mayor to the BEDT board.

At its Board meeting of December 18, the BEDT board passed a motion to establish the Mayor and two Councillors as Council-appointed board members until the 2026 BEDT Annual General Meeting, at which time there would be a discussion about a long-term City representation model aligned with the outcomes of the third-party governance review.

The recommendation that is in this report aligns with the BEDT motion, to appoint the Mayor to the board for a term that would be determined following discussion at the 2026 AGM, but in any event would not be longer than the current term of council.

Analysis

Option 1: Council appoints the Mayor as an additional member of the BEDT board. The Mayor's Designate on BEDT remains, as does the Council Representative on the former Tourism Board.

Benefits: Aligns with the Municipal Act provisions that exempt council-appointees from a Conflict of Interest in discussing Board business.

Considerations:

This is the preferred option of the BEDT Board as they have expressed its desire for the Mayor to remain a member of the BEDT board.

Option 2: The Mayor is no longer a member of the BEDT board.

Benefits: Avoids potential Conflict of Interest arising from being a guest of the board, versus a Council-appointee.

Considerations:

This is not the preferred option of BEDT Board, as they have expressed its desire for the Mayor to remain a member of the BEDT board.

Recommendation Details

Option 1 is being recommended in respect of the motion from the BEDT Board for the Mayor to remain a member, and in alignment with advice received by the Integrity Commissioner for handling Conflict of Interest arising from membership on external boards.

Strategic Alignment

- ☐ Designing and delivering complete communities
 - ☒ Providing the best services and experiences
 - ☐ Protecting and improving the natural environment and taking action on climate change
 - ☐ Driving organizational performance
-

Author:

Mayor Marianne Meed Ward
Mayor@burlington.ca

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Motion Memorandum

SUBJECT: Proposed amendments to Procedure By-law regarding Council questions and comments

TO: Committee of the Whole

From: Councillor Shawna Stolte

Date to Committee: January 12, 2026

Date to Council: January 27, 2026

Motion for Council to Consider:

Direct the City Clerk/Director of Legislative Services to report back to Committee of the Whole with the following proposed amendments to Burlington Procedure By-law 59-2024 for consideration:

“Each member will have a maximum of three minutes to speak on a motion and will be given the option of an additional maximum three minutes after every member has been allowed to speak. This time cannot be accumulated and added to the additional commentary period. There will be a maximum of two commenting periods per member and any additional requests for commentary will only be provided to members through the passing of a two-thirds vote.”; and

“Each member will have the opportunity to ask two questions, to a maximum of one minute per question on a motion and will be given the opportunity to ask an additional two questions after every member has been allowed to ask questions. There is no limit to the number of questions each member can ask providing that the above guidelines are adhered to and the questions are concise, directly related to the agenda item being discussed and that question period is not used as an opportunity to comment or express opinions of the matter being discussed.”; and

“The management of both question and commenting periods remains within the authority and purview of the Chair of the Meeting”.

Reason:

Our Procedure By-law 59-2024 Section 49.12 presently grants members of Council the right to provide commentary for five (5) minutes on every Motion on the Committee of

the Whole and Council agendas, with the option of an additional five (5) minutes after every other member of Council has spoken.

This has resulted in the potential Council commentary time to exceed one hour for every item on the agenda for both Committed of the Whole as well as Council meetings.

There has been the additional challenge that due to a lack of clarity in our Procedural Bylaw, members of Council have advocated that their right to 10 minutes of commentary can be broken into multiple short comment periods which has led to an extraordinary lack of efficiency during Committee and Council meetings.

In early 2023 Council debated whether the commenting period as outlined in our Procedural Bylaw was an effective way of managing meetings and agreed “in principle” to adhere to a new Best Practice of limiting questions to one (1) minute per question and commentary to three (3) minutes for each member of Council per agenda item.

This Best Practice has worked effectively for the past two years but recently has been challenged by members of Council who have expressed a desire to utilize their rights as per our existing Procedural Bylaw that allows for multiple commenting periods up to a maximum of ten (10) minutes per item.

In the spirit of efficiency of time and the expectation that Council members be able to express their opinions and comments clearly and briefly, to convey as much meaning as possible in as few words as possible, to be concise, direct and to the point and make communication easy to understand for the public, it is important that the Procedural Bylaw be updated to provide concrete guidelines on this matter.

Outcome Sought:

To provide clarity and succinctness to an element of the City of Burlington Procedure By-law that will ensure brevity, efficiency, and economy of communication to Council question and commentary periods.

Implications:

Committee and Council meetings will be more efficient and succinct.

References:

Strategic Alignment

- ☐ Designing and delivering complete communities
 - ☒ Providing the best services and experiences
 - ☐ Protecting and improving the natural environment and taking action on climate change
 - ☒ Driving organizational performance
-

Approved as per form by the City Clerk

Motion Memorandum

SUBJECT: Correspondence from the Cycling Advisory Committee

TO: Committee of the Whole

From: Councillor Rory Nisan

Date to Committee: January 12, 2026

Date to Council: January 27, 2026

Motion for Council to Consider:

Receive for information the attached correspondence from the Cycling Advisory Committee regarding the Vision Zero Program.

Reason:

To inform Council of the Cycling Advisory Committee's correspondence and input related to the Vision Zero Program.

Outcome Sought:

That Council is informed of the Cycling Advisory Committee's correspondence advocating for the formal adoption of a Vision Zero Program and is reminded of the importance of advancing work toward the development and implementation of such a program to improve transportation safety for all road users.

Implications:

N/A

References:

[City of Burlington Integrated Mobility Plan](#)

Strategic Alignment

- ☒ Designing and delivering complete communities
- ☒ Providing the best services and experiences
- ☐ Protecting and improving the natural environment and taking action on climate change
- ☐ Driving organizational performance

Approved as per form by the City Clerk

Good afternoon Councillors,

In light of the recent death of Jean Louis on Friday October 17, 2025 at the corner of Appleby and Harvester, we write to council in reminder of the importance of adopting a formal Vision Zero Program.

All road users are impacted by the safety of the transportation system. Vision Zero refers to the strategies, tools, and measures cities can use to prevent collisions resulting in injuries and deaths. It's not a checklist - it's a philosophy and mindset focused on making the network safer at a systemic level. See <https://www.tac-atc.ca/wp-content/uploads/prm-vzss-e.pdf>

Responsibility for preventing crashes, injuries and deaths does not rest with individuals. We cannot personal-responsibility our way out of a system that prioritizes automobile flow over people's safety. It is unethical to allow individual failures to lead to death or serious injury. Most solutions involve changes to speed or alternative approaches to road design. A safe network should be the default design.

And many of the 2050 modeshare targets rely on that network being safe enough for people to use.

Excerpt from the 2023 Integrated Mobility Plan:

A new Vision Zero Program is proposed for Burlington. The program's mandate will include the following action:

- *Develops, designs, recommends and implements measures to eliminate fatal and injury collisions and protect vulnerable road users to achieve Vision Zero.*

The program's mandate / key responsibilities could include the following actions:

- *Achieve Council-endorsement to formally adopt the Vision Zero approach to transportation safety.*
- *Increase efforts dedicated to proactive analysis and identification of problems.*
- *Review, create and update various transportation guidelines including but not limited to traffic calming, speed management, street and trail lighting.*
- *Develop metrics, mapping tools, dashboards and reports that measure safety performance and assist with analysis.*
- *Review, develop and pilot new and innovative street and intersection design with a focus on safety for all users.*
- *Review the applicability and implementation of automated enforcement tools.*

Surrounding municipalities have established a formal Vision Zero program, including Guelph, Hamilton, Brantford, Kitchener, Mississauga, Peel Region, etc. We need to catch up. See <https://parachute.ca/en/program/vision-zero/vision-zero-map/> and references below.

The public has frequently voiced their safety concerns at Food For Feedback, including the lack of trail lighting, excessive speeds, motorists doing right-hooks or right turns on red. People

outright avoid micromobility transport in some areas of the city. See red dots on photo for bad/risky locations.

And as Helsinki is Burlington's model city, please note that they recently reported zero road deaths in the last 12 months, with the last being June 2024. We can copy what works there.

In 2023, a Vision Zero Program was estimated to take 0-5 years for formal adoption and to develop an action plan. Two years have passed, and we should turn our attention toward meeting this goal within that timeframe.

We support staff hiring a project manager and beginning work on a formal Vision Zero Program now. Zero deaths or injuries are acceptable.

Regards,

Refs

<https://quelfh.ca/living/getting-around/vision-zero/>
<https://www.hamilton.ca/home-neighbourhood/getting-around/driving-traffic/vision-zero-roadway-safety>
<https://www.brantford.ca/en/transportation/vision-zero-brantford.aspx>
<https://www.kitchener.ca/en/strategic-plans-and-projects/vision-zero.aspx>
<https://www.mississauga.ca/projects-and-strategies/city-projects/vision-zero/>
<https://peelregion.ca/transportation-roads/road-safety-traffic-flow/vision-zero>
https://urban-mobility-observatory.transport.ec.europa.eu/news-events/news/helsinki-records-zero-road-deaths-over-past-year-2025-08-22_en

SUBJECT: City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area
TO: Committee of the Whole
FROM: Development and Growth Management
Community Planning
Report Number: DGM-01-26
Wards Affected: All
Date to Committee: January 13, 2026
Date to Council: January 27, 2026

Recommendation

Direct the Director of Community Planning to consider Council, agency, development partners, and community feedback received as part of this statutory public meeting prior to bringing forward a staff report recommending approval of Official Plan Amendment No. 7 and Burlington Regional Official Plan (ROPA) Amendment No.1.

Executive Summary

Purpose of report:

- The purpose of this report is to release a draft of both proposed Official Plan Amendment No. 7 (attached as Appendix B) and amendment No. 1 to Burlington's Regional Official Plan (attached as Appendix D) for community and Council consideration. This report will highlight elements of the proposed Official Plan Amendment (OPA) and Regional Official Plan Amendment (ROPA) that provide direction for the City's Employment Area in order to:
 - Update the City's policy framework to align with recent changes to Provincial policy;
 - Explore opportunities to simplify and streamline the Employment Area policy framework; and,
 - Seek to streamline the development approvals process while minimizing any impacts on, and create certainty for, local businesses and property owners by exploring the implementation of a Community Planning Permit (CPP) By-law and System.

- Through the links and appendices provided, this report contains the findings of the Population and Employment Growth Analysis Study, published in 2025 and contains technical work which among several other inputs, informed this draft OPA and ROPA including the findings of early public consultation.
- This report will outline the public engagement undertaken to date and will identify future engagement opportunities.
- For next steps, staff will consider all feedback received and will bring forward to Council a recommendation for approval of the proposed OPA and ROPA.

Recommendation Report

Background

Project Background – Official Plan Amendment to update Burlington’s Employment Area Policies

The City’s Official Plan Amendment to update Burlington’s Employment Area has been underway since September 2025 and has been guided by the Burlington Official Plan, 2020 Targeted Realignment Exercise.

The purpose of this report is to release a draft of both Official Plan Amendment No. 7 (attached as Appendix B) and amendment No. 1 to Burlington’s Regional Official Plan (attached as Appendix D) for community and Council consideration.

This report will:

- Highlight elements of the proposed Official Plan Amendment (OPA) that provides direction for the City’s Employment Area in order to update the City’s policy framework to align with recent changes to Provincial policy;
- Highlight elements of the proposed ROPA No. 1 to the Burlington Regional Official Plan (BROP), 1995, to ensure consistency and conformity with the updated provincial policy framework and to harmonize with the Burlington Official Plan, 2020.
- Explore opportunities to simplify and streamline the Employment Area policy framework and development approvals process and seek to reduce the impacts on and create certainty for local businesses and property owners by exploring the implementation of a Community Planning Permit (CPP) By-law and System.

BOP 2020, Targeted Realignment Exercise and Population and Employment Growth Analysis Technical Work

Through a series of previous reports, an approach to advance the Burlington Official Plan, 2020 (BOP, 2020), in alignment with the evolving policy framework, was identified, see the reference section for details. The preparation of a “Local Growth Management Update – Growth Expectations to 2051” was identified as a key study, and this work was completed and presented to Council on March 3, 2025, through Staff Report [DGM-20-25 Findings of report Growth Analysis Review – City of Burlington](#). The report was prepared by Watson Economists Ltd. in association with Dillon Consulting Limited. This report was developed to provide a single, reliable, up-to-date source of population and employment growth information that could be used to support the City in applying a growth lens to planning and service delivery as well as supporting the City’s expanding role in growth management and facilitation.

The findings of this report were used to inform and support the development and drafting of the proposed OPA and ROPA. This report has been appended as Appendix F to this report.

The attached draft OPA and ROPA reflect recent planning policy changes, supported by the City's employment growth and land needs assessment technical work and the feedback received to date through initial public consultation.

Staff report [DGM-63-25 Evolving the targeted realignment workplan](#), identified OPA 7 as a part of the workplan area "Urban Structure and Growth Framework Update" to be informed by the findings of the technical studies (growth analysis) to propose new official plan policies that are consistent with the recent changes related to Employment Area in both the Planning Act and PPS, 2024 and to consider a CPP By-law in the Employment Area.

The Planning Act and PPS, 2024

Legislative changes made through Bill 97, *Helping Homeowners, Protecting Tenants Act, 2023*, have amended the definition in the *Planning Act* for "area of employment." The new definition narrows the permitted uses within the Employment Area to primarily manufacturing (including related research and development), warehousing and goods movement uses, retail and office uses that are *directly* associated with the primary use, ancillary facilities, and any other prescribed business and economic uses. Commercial uses not associated with the primary use, including office and retail, are now prohibited within the Employment Area.

As a part of Bill 97, the province introduced a transition provision (subsection 1(1.1)) that authorizes the continuation of uses that were lawfully established within the Employment Area as of October 20, 2024.

On October 20, 2024, the Province introduced a new Provincial Planning Statement (PPS, 2024) and repealed the Growth Plan with no transition. The PPS, 2024, continues to prohibit residential uses in the Employment Area and further, it now prohibits institutional uses and public service facilities in Employment Areas, such as schools, child-care, hospitals and long-term care services, recreation, and police and fire protection. The new PPS, 2024, eliminates the municipal comprehensive review process for employment land conversions, and introduced a policy that sets criteria for the removal of land from the Employment Area on a site-by-site basis rather than every 5 years through a municipal comprehensive review process as was previously directed by the Growth Plan. The Province elected not to provide a transition framework to implement the PPS and as per the applicable provisions of the Planning Act, all municipal planning decisions must be consistent with the PPS, 2024.

These changes have necessitated amendments to the Employment Area policies of both the BOP, 2020 and the Burlington Regional Official Plan (BROP), 1995, to ensure consistency and conformity with the updated provincial policy framework. In addition, the Planning Act requires that municipalities review their zoning by-laws to ensure that the zoning by-law is up to date and aligns with the Official Plan.

Transition of Planning Responsibilities and Status of the Burlington Regional Official Plan

Following the Province's removal of planning responsibilities from the Region of Halton, which took effect on July 1, 2024, the Regional Official Plan (referred to from this point forward as the "Burlington Regional Official Plan, 1995" or "BROP, 1995") became an official plan of each of the lower-tier municipalities in Halton. The policies of the BROP, 1995 are in-force and effect and the adoption of the BROP, 1995 and associated policies and designations cannot be appealed.

Included in BROP, 1995 are policies which changed the boundary of Burlington's Employment Area (as identified in Map 1-H of the BROP, 1995); allowed a limited number of Employment Area conversions identified and recommended by the City; conversions first implemented through the Minister's decision on ROPA 49 and subsequently supported by Council; as well as a range of policy changes related to the Region's Employment Area.

Staff are recommending Council approve an amendment to the Burlington Regional Official Plan, 1995, to harmonize the BOP, 2020, and the BROP, 1995, and bring them into consistency with provincial policy as they relate to the City's Employment Area.

Status of the Burlington Official Plan, 2020

On November 30, 2020, the City's new Official Plan (BOP, 2020) was approved by Halton Region. A significant portion of the Burlington Official Plan was appealed in 2020 and has not come into effect. The City's current approach to advancing the appealed portions of the BOP, 2020, while also addressing the ongoing changes to Ontario's land use planning framework, is outlined in report [PL-25-42: Burlington Official Plan, 2020. Targeted Realignment Exercise – Initial Work Plan](#). The work plan identifies a role for both modifications (through the OLT process) and amendments (through a City-initiated statutory process) to address the whole range of changes to the planning framework in place at the time of Regional approval of the Official Plan.

OPA 7 Amendment Process

The majority of the policies related to Burlington's Employment Area in the BOP, 2020, are currently appealed to the OLT. Given the wide range of changes noted above, the policies and schedules are not consistent with the PPS and do not comply with the Planning Act and must

be re-evaluated. To support this re-evaluation staff propose to withdraw appealed policies (see Appendix A to this report) or repeal policies and propose new policies that have been prepared to be consistent with the PPS and that comply with the Planning Act. This process occurs through statutory Official Plan Amendments.

Additionally, the realignment will address housekeeping matters such as terminology changes and cross-references throughout other sections of the BOP, 2020.

Concurrently, with OPA 7, the City will initiate an amendment to the BROP, 1995, which will provide for the harmonization of the two plans of the city, BOP, 2020, and ROP, 1995, (ROP Amendment No. 1 for City of Burlington) to repeal duplicative policy and or policy that is not aligned with the Provincial policy framework as it relates to Employment areas and related policies.

Analysis

Burlington's Employment Area

The City's Employment Area plays a key role in supporting Burlington's economy by providing space for manufacturing, innovation, and business growth. This area is protected to ensure a wide range of uses and jobs can be accommodated and to maintain economic activity as the population grows. The defined Employment Area lands are strategically located along major highways and transportation corridors to facilitate the efficient movement of goods and people. The Employment Area is geographically defined in Official Plans (see Map 1-H of [the Burlington Regional Official Plan](#)). In Burlington, nearly half of all the jobs are concentrated within this area.

Guiding Principles, Objectives and Summary of Associated BOP, 2020 Amendments

- 1. Update the City's policy framework to align with recent changes to Provincial policy**
 - Update the policies of the BOP, 2020, to reflect the revised definition of "Area of Employment" set out in the Planning Act;
 - Update the policies of the BOP, 2020, to reflect the prohibited uses in the Employment Area as identified in the PPS, 2024; and
 - Update the policies of the BOP, 2020, to implement the transition policy identified in the Planning Act Subsection 1 (1.1) authorizing the continuation of a use that is now excluded from the Area of Employment provided that the use was lawfully established on the parcel of land before October 20, 2024.
- 2. Simplify and streamline the Employment Area policy framework**
 - Update the policies of the BOP, 2020, to simplify the policy framework;
 - Update the policies of subsection 8.2 of the BOP, 2020 to consolidate the employment land use designations from two designations to one land use

designation across the entire Employment Area with the exception of the Employment Area lands listed below:

- Downtown Burlington Urban Growth Centre/Major Transit Station Area
 - Aldershot GO Major Transit Station Area
 - Appleby GO Major Transit Station Area
 - Uptown Urban Centre
- Propose the withdrawal or repeal of policies from the BOP, 2020, that are duplicative or that direct work that has since been completed. A summary of these policies applicable to Employment Areas is attached as Appendix A.
 - Propose the withdrawal or repeal of policies from the BOP, 2020, that are replicated from other strategic documents of the City of Burlington in order to ensure that the City is using the correct tool for the intended purpose. Examples of strategic documents and masterplans of the City that inform the policies of the BOP, 2020, include but are not limited to:
 - Burlington's Strategic Plan
 - Integrated Mobility Plan
 - Agricultural Action Plan
 - Economic Development Strategic Plan

3. Reduce the impact on, and create certainty for, local businesses and property owners by exploring the implementation of a Community Planning Permit (CPP) By-law and System.

- Update the policies of the BOP, 2020, to implement the transition policy identified in the Planning Act Subsection 1 (1.1) authorizing the continuation of a use that is now excluded from the Area of Employment provided that the use was lawfully established on the parcel of land before October 20, 2024.
- Staff have prepared the memo: "Exploring a Community Planning Permit System for Burlington's Employment Area", attached as Appendix G to this report.
- Staff will continue to engage with interested and affected parties related to the opportunity for the delivery of a CPP by-law and system in the City's Employment Area.

What is a Community Planning Permit System?

A Community Planning Permit System (CPPS) is a land use planning tool in the Planning Act, available to municipalities when planning for the future state of communities. Municipalities can apply a CPPS to all of their municipality or only to select areas and can tailor the CPPS to their local context and needs. A Community Planning Permit By-law (CPP By-law) is a land use planning tool that combines Zoning By-law Amendments (ZBA), Minor Variances (MV), and Site Plan Approval (SPA), into a single application and streamlined approval process that will remove process barriers and facilitate investment decisions that require planning approvals

(e.g. new construction or expansion of existing industrial buildings). For additional information, please see Appendix G.

Elements outside the scope of OPA 7

- The employment land use policies of the Major Transit Station Areas are outside of the scope of this project. These areas have been addressed through OPA 2 for the City's PMTSAs.
- Given that hundreds of hectares of Employment Area lands were recently removed from the Employment Area through a comprehensive public process in 2022, resulting in ROPA 48 and 49, the consideration of amendments to the geography of the City's Employment Area as identified in Map 1-H of the Burlington Regional Official Plan, is outside of the scope of this project.

Technical Study: Local Growth Management Update, Growth Expectations to 2051

The population and employment growth analysis report contains employment projections and an Employment Land Needs Assessment to 2051 for Burlington. These projections were based on the most up to date information available and considered recent changes to Provincial and Regional policy. The report finds that the City has sufficient land in the Employment Area to 2051, after which, the City will have exhausted its employment land supply. The Report identifies the need to preserve and protect designated Employment Areas within Burlington over the long-term planning horizon.

Burlington's Employment Area Snapshot

Halton Region's 2024 Employment Survey identifies approximately 5,000 active businesses operating within the City of Burlington. Approximately 2,000 of these businesses are located within the City's Employment Area, accounting for approximately 40% of all businesses city-wide. These businesses hold around 43,000 jobs, or roughly 45% of total employment in Burlington (there are approximately 100,000 jobs in Burlington). This concentration illustrates the vital economic role that the Employment Area plays in supporting a significant share of Burlington's workforce and business activity.

According to the 2024 Employment Survey data, approximately 46% of all businesses within the Employment Area align with the new definition of "Employment Area" under the Planning Act and the Provincial Policy Statement (PPS), 2024. These businesses fall within clusters of economic activity that include manufacturing, research and development connected to manufacturing, warehousing, goods movement, associated retail and office uses, and other ancillary facilities. Together, these businesses account for approximately 25,000 jobs, representing approximately 58% of all jobs located within the Employment Area.

Conversely, if reflecting primarily on North American Industry Classification System (NAICS) codes, without undertaking a site-by-site assessment, as many as 1,000 businesses might not be captured by the new Provincial definitions applicable to employment areas. These businesses are primarily associated with institutional and commercial activities, including retail and office functions not directly tied to the core employment uses identified in the Planning Act and the PPS 2024. These activities account for an estimated 17,800 jobs, or 42% of total jobs within the Employment Area. Many of these businesses either directly support business in the employment areas (e.g. marketing or IT support office activities) or workers in the employment areas (e.g. daycare centres). This high-level distinction provides important insight into the current mix of activities and reinforces the need for careful planning and monitoring to support employment uses and ensure long-term economic resilience.

Burlington's Employment Area looking to 2051 and Beyond

By 2051, Burlington's employment base is forecast to reach approximately 124,000 jobs across the entire City. This represents an increase of approximately 22,000 jobs between 2024 and 2051. The City of Burlington is forecast to generate a total land demand of 83 net hectares (205 net acres) between 2024 and 2051 in the City's Employment Area. Watson's report concludes that Burlington would have a surplus of just 2 net hectares (5 net acres) or 3 gross hectares (7 gross acres) of Employment Area lands to accommodate the growth forecast for 2051. This demonstrates that the City will have nearly exhausted its remaining supply of vacant Employment Area lands by 2051. This may result in the need to redevelop older industrial buildings that are functionally obsolete (e.g. those buildings with low floor to ceiling heights) or result in pressure to allow for the use of these buildings for non-employment activities as defined by the PPS, 2024. Accordingly, there is a need to preserve and protect the designated Employment Areas within the City of Burlington for employment use over the long-term planning horizon to accommodate planned employment growth and maintain the City's non-residential tax base.

Summary of Land Need Assessment Findings

- As a result of ROPA 48 and ROPA 49, hundreds of hectares of employment lands were converted.
- 17% of employment growth is expected to be located within the City's Employment Area compared to 49% identified in the 2019 Population and Employment Analysis Study Report.
- In alignment with the policies of the Regional Official Plan (resulting from ROPA 49), the prescribed density of the Employment Area has shifted to 33 jobs per hectare down from the assumed 45 jobs per hectare used to forecast employment growth in the

Employment Area in the 2019 Population and Employment Growth Analysis Study Report.

- Beyond 2051, the City will require an employment intensification strategy to guide the City as it matures into a city without greenfield/vacant employment land.

Public Consultation Summary

- Food for feedback, September 13, 2025
- Public Open House, December 2, 2025
- Meet with a Planner November 24, 2025, to January 12th, 2026
- Postings to the project web pages
- Mail to all businesses and property owners in the Employment Area in advance of the Dec. 2, 2025, Public Open House.
- Statutory Public Notice Circulation
- Virtual Public Open House, January 5, 2026
- Statutory Public Meeting January 13, 2026

Summary of feedback to date

Since the project was initiated in September 2025, the team has gathered feedback from the public through a variety of methods as noted above. Below, provides a list of the emerging themes of the feedback provided to date:

- Clarification about changes to the permitted uses in the Employment Area and how and when regulations will be updated to reflect those changes
- Clarification about how the transition policy identified in section 1(1.1) of the Planning Act will be applied to existing uses that are no longer permitted after October 20, 2024, and how these changes may impact current property owners and businesses.
- Concerns about the future stability of the City's Employment Area and economic viability in the face of the recent changes to the permitted uses within the Employment Area.
- Concerns about land use compatibility and development review.
- Concerns about transportation and infrastructure impacts.
- Questions about future engagement and how and when to get involved in the future CPPS work related to the Employment Area.

Staff will continue to seek feedback from interested and affected parties in an effort to present a clear picture of the proposed changes and will continue to work with the public to address concerns and find solutions to support business investment decisions and remove process barriers to provide timely development approvals. A feedback report and response table will be prepared and published as a part of the future recommendation report.

Recommendation Details

Staff recommend that Council direct staff to consider Council, agency, development partners, and community feedback received as part of this statutory public meeting, the public open houses, as well as written submissions to inform the finalization of OPA 7 and ROPA 1 to be provided to Council for approval.

Key Dates & Milestones

October 20, 2024: Bill 97 Royal Assent, Changes to the Planning Act and New PPS, 2024

March 2, 2025: Population and Employment Growth Analysis

September 1, 2025: Official Plan Amendment to Update Employment Area Policies project commences

November 2025: Information letter mailed to each business and property owner in the Employment Area, information also posted to the project webpage

December 2, 2025: Public Open House

December 12: Statutory Public Notice posted to the statutory notice webpage and mailed to each business and property owner located in the Employment Area.

December 19: Draft OPA posted to the project webpage

January 5, 2026: Virtual Public Open House

January 13, 2026: Statutory Public Meeting

Implications

To date, staff have spent \$795.49 on items such as printing, mailing, and other resources to support engagement events and fulfill requirements for statutory notice per the Planning Act.

References

- [March 18, 2025:DGM-20-25 Findings of report Growth Analysis Review – City of Burlington](#)
 - [November 3, 2025: DGM-63-25 Evolving the targeted realignment workplan](#)
 - [March 3, 2025: DGM-09-25 Transition of planning responsibilities from Halton Region](#)
 - [June 27, 2023: PL-45-23 Burlington Official Plan, 2020 Targeted Realignment Exercise – Initial Work Plan](#)
 - [OPA 7 Get Involved Project Web Page](#)
 - [OPA 7 Burlington.ca Project Web Page](#)
 - [A Guide to OPA 7](#)
-

Strategic Alignment

- ☒ Designing and delivering complete communities
 - ☒ Providing the best services and experiences
 - ☐ Protecting and improving the natural environment and taking action on climate change
 - ☐ Driving organizational performance
-

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Appendices:

- A. Withdrawal List
- B. Draft OPA No. 7
- C. Draft OPA 7 Tracked changes
- D. Draft ROPA No. 1
- E. Draft ROPA No.1 Tracked Changes
- F. Growth Analysis Review – City of Burlington
- G. Exploring a Community Planning Permit System for Burlington's Employment Area

Report Approval:

All reports are reviewed and approved by the Commissioner, Head of Corporate Affairs, Chief Financial Officer, and Commissioner of Legal and Legislative Services/City Solicitor.

Appendix A: Proposed Withdrawals of Appealed BOP 2020 Policies

The policies identified in the table below are currently appealed in the BOP, 2020. As a result of recent changes to provincial policy, these policies will no longer be pursued by the City of Burlington as they are no longer consistent with provincial policy. As such, these policies are identified for withdrawal from the Official Plan, 2020.

Chapter/Section	Policy for Withdrawal
Chapter 2, Community Vision Section 2.3, The Urban Structure	<p>Withdraw the following text of Subsection 2.3 entirely:</p> <p>“The City’s Urban Structure elaborates on the Urban Area, as identified in Schedule A: City System, of this Plan. Each element of the Urban Structure performs a distinct function. Some elements ensure long term protection, while others support growth, <i>intensification</i> and appropriate transition. The Urban Structure establishes the community vision for the Urban Area which is further refined in Chapter 8: Land Use Policies – Urban Area, of this Plan.</p> <p>The Urban Structure is composed of seven major components: 1. Mixed Use <i>Intensification</i> Areas; 2. Region of Halton Employment Area; 3. Lands designated for employment uses; 4. Residential Neighbourhood Areas; 5. Natural Heritage System, Major Parks and Open Space; 6. Mineral Resource Extraction Area; and 7. Infrastructure and Transportation Corridors, as shown on Schedule B: Urban Structure, of this Plan. Each area is identified in Schedule B: Urban Structure, of this Plan. Additional information in support of other policies of this Plan, including the identification of areas that will be subject to further study, as well as other contextual information, is also presented in Schedule B-1: Growth Framework, of this Plan.”</p>
Chapter 2, Community Vision, Section 2.3 The Urban Structure	<p>Withdraw the policies of the following subsection entirely:</p> <p>2.3.2 LANDS DESIGNATED FOR EMPLOYMENT USES</p>
Chapter 2, Community Vision,	<p>Withdraw the policies of the following subsection entirely:</p>

Appendix A – DGM-01-26 Proposed Policies for Withdrawal

Section 2.3 The Urban Structure	2.3.3 EMPLOYMENT AREA
Chapter 3, Complete Communities, Public Service Facilities and Institutional Uses	Withdraw the policies of the following subsection entirely: 3.2.2 POLICIES
Chapter 3, Complete Communities, Public Service Facilities and Institutional Uses, 3.2.3 Site Specific Policies	Withdraw the following policy: 3.2.3 c)
Chapter 5 – Economic Activity	Withdraw the policies of the following subsections entirely: 5.0 [Preamble] 5.1 ACCOMODATING EMPLOYMENT 5.2 PROTECTING THE EMPLOYMENT AREA 5.3 INNOVATION DISTRICTS 5.4 STRATEGIC ECONOMIC DEVELOPMENT AREAS 5.5 [Preamble] 5.5.2 POLICIES
Chapter 7, Design Excellence, Section 7.3 Urban Design and Built Form, Growth Areas	Withdraw the following policy: 7.3.2(3) a) (ix) a.
Chapter 8, Land Use Policies, urban Area, Section 8.1, Mixed Use Intensification Areas 8.1.1(4.9) Uptown Business-Employment Designation	Withdraw the policies of the following subsection entirely: 8.1.1 (4.9) UPTOWN BUSINESS-EMPLOYMENT DESIGNATION
Chapter 8, Land Use Policies – Urban Area, 8.2 Employment	Withdraw the following text of Subsection 8.2 entirely: The lands identified as General Employment and Business Corridor on Schedule C: Land Use – Urban Area, of this Plan, are designated for employment uses and help the City to fulfill its obligation to ensure all types of businesses can locate and thrive in the city. These designations are based on a range of permitted uses, the scale and intensity of the <i>development</i> allowed, the

Appendix A – DGM-01-26 Proposed Policies for Withdrawal

	<p>design standards that <i>shall</i> apply and the potential <i>adverse effects</i> of these uses on adjacent uses. A full range of manufacturing, warehousing and <i>office</i> uses will be permitted on lands designated for employment uses. <i>Accessory</i> retail and <i>service commercial uses</i> and other facilities ancillary to manufacturing, warehousing and <i>office</i> uses may be permitted, subject to the policies of this Plan.</p> <p>The objective of the employment policies is to ensure opportunities to accommodate employment to the planning horizon of this Plan and beyond. Given that there will be very limited, if any, opportunities to designate additional <i>employment</i> land, future employment growth, beyond 2031, will be accommodated primarily through <i>intensification</i>.</p>
Chapter 8, Land Use Policies – Urban Area, 8.2 Employment	<p>Withdraw the policies of the following subsection entirely:</p> <p>8.2.1 8.2.2 8.2.3 8.2.3(1) 8.2.3(2) 8.2.4 8.2.4(1) 8.2.4(2)</p>
Chapter 12, Implementation and Interpretation, 12.1.3, Planning Process: Area Specific Planning	Withdraw policy 12.1.3(2) a)
Chapter 13, Definitions	<p>Withdraw the following definitions:</p> <p>Ancillary Employment Use Employment Area Employment Designated Growth Area</p>
Schedule C – Land Use – Urban Area	Withdraw Schedule E Land Use – Uptown Urban Centre in its entirety.

OFFICIAL PLAN AMENDMENT
PROPOSED AMENDMENT NO. 7 TO THE OFFICIAL PLAN
OF THE BURLINGTON PLANNING AREA

CONSTITUTIONAL STATEMENT

The Amendment contained in Part “B” of this document constitutes Amendment No. 7 to the Official Plan of the City of Burlington, 2020.

PART A – PREAMBLE

PURPOSE OF THE AMENDMENT

The purpose of this Official Plan Amendment is to update policy text and schedules of the *Burlington Official Plan, 2020* (BOP, 2020) related to the City’s Employment Area, to align with recent changes to Provincial and Regional policy.

The effect of the proposed Amendment is to:

- Update employment area policy, in accordance with the Planning Act, and consistent with the Provincial Planning Statement, 2024 (PPS), including:
 - Update the BOP, 2020 Employment Area definition to align with the new “area of employment” definition in the *Planning Act* and further expanded in the PPS, 2024
 - Align Employment Area land use permissions with the new provincial definition
 - Support the continuation of any lawfully established uses within the Employment Area that are excluded from the definition of “area of employment”
 - Update the Employment Area land conversion criteria;
- Minimize the impact on, and create certainty for, businesses and property owners; and
- Simplify and streamline land use policy for the City’s Employment Area.

1.1 Site and Location

The proposed amendment applies to the Employment Area, as shown on Attachment 1, within the City of Burlington and subject to the policies of the Burlington Official Plan, 2020.

BASIS FOR THE AMENDMENT

2.1 Status of the Burlington Official Plan, 2020

On November 30, 2020, Halton Region approved a new Official Plan for the City of Burlington. The Plan outlines the community's vision for growth through an Urban Structure and Growth Framework which establishes a hierarchy of land uses to accommodate growth within a set urban boundary. The Urban Structure includes protected and other employment areas, and the Growth Framework identifies areas for employment development and intensification.

A significant portion of the BOP, 2020, including policies relating to the Employment Area, is subject to broad appeal and therefore not yet in effect. However, a Decision issued by the Ontario Land Tribunal (OLT) on January 4, 2023 confirmed that some portions of the new Official Plan did come into effect on Dec. 22, 2020 (the day after the end of the appeal period), meaning that the Plan has legal status and may be amended in accordance with the Planning Act. Since the January 2023 Decision, a number of additional policies have been brought into effect through approved settlements, as well as a number of Motions for Partial Approval put forward by the City (OLT Decisions issued on April 2, 2024 and November 24, 2025).

The City's current approach to advancing the appealed portions of the BOP, 2020, while also addressing the ongoing changes to Ontario's land use planning framework, is outlined in report [PL-25-42: Burlington Official Plan, 2020. Targeted Realignment Exercise – Initial Work Plan](#). The work plan identifies a role for both modifications (through the OLT process) and amendments (through a City-initiated statutory process) to address the whole range of changes to the planning framework that was in place at the time of Regional approval.

While changes to appealed policies typically proceed by way of OLT modification, in some limited and specific circumstances, amendments may also be brought forward to replace policies that are not yet in effect, such as the Employment Area policies.

In this context, the City is effectively ‘withdrawing’ the appealed policies and proposing new policies that are in alignment with the Regional Official Plan (an Official Plan of the City of Burlington) and the Provincial planning framework.

2.2 Regional Transition of Planning Responsibilities

Legislative changes made through Ontario’s Bill 23, *More Homes Built Faster Act, 2022* and Bill 185, *Cutting Red Tape to Build More Homes Act, 2024*, has transitioned planning responsibilities from some upper-tier municipalities to lower-tier municipalities. On July 1, 2024, through changes to the Planning Act, the Province identified the Region of Halton as an “upper-tier municipality without planning responsibilities”. As a result, the Regional Official Plan is no longer an official plan for the Regional Municipality of Halton. Instead, it has been deemed an official plan of each of the lower-tier municipalities in Halton (City of Burlington, Town of Halton Hills, Town of Milton, and Town of Oakville), until it is revoked or amended by the respective municipality. *Halton Regional Official Plan, 1995*, policies are in-force and effect, and cannot be appealed.

Amendments made to the ROP, 1995 through Regional Official Plan Amendments (ROPAs) No. 48 and No. 49 and subsequent Minister modifications in the ROPA decisions, changed the boundary of Burlington’s Employment Area. ROPA 48 included a limited number of Employment Area conversions recommended by the City to support the mixed-use development of certain strategic growth areas. The ultimate effect of ROPA 49 included additional Employment Area conversions of two key sites: Bronte Creek Meadows and 1200 King Road. ROPA 49 also modified land use compatibility policies and the approach for population and employment growth distribution to the planning horizon year of 2051.

Concurrently with OPA 7, the City will initiate an amendment to the Regional Official Plan (a plan of the City of Burlington) which will seek to harmonize the two plans of the city, BOP, 2020 and ROP, 1995, (ROP Amendment No. 1 for City of Burlington) to repeal duplicative policy and or policy that is not aligned with the Provincial policy framework.

2.3 Changes to Provincial Policy Framework – Employment Area

Legislative changes made through Bill 97, *Helping Homeowners, Protecting Tenants Act, 2023*, have amended the definition in the *Planning Act* for “area of employment”, narrowing the permitted uses within the Employment Area to primarily manufacturing (including related research and development), warehousing and goods movement uses, retail and office uses directly associated with the primary use, ancillary facilities and any

other prescribed business and economic uses. Commercial uses not associated with the primary use, including office and retail, are now prohibited within the Employment Area.

Policy changes in the new Provincial Planning Statement (PPS), 2024, continue to prohibit residential uses in the Employment Area. Further, the PPS now expressly prohibits institutional uses and public service facilities in Employment Areas, such as schools, child care, hospitals and long term care services, recreation, and police and fire protection.

A transition provision in the *Planning Act* authorizes the continuation of uses that were lawfully established within the Employment Area as of October 20, 2024. A transition policy must be adopted through an Official Plan Amendment to recognize lawfully established uses.

Updated Provincial policy eliminates the municipal comprehensive review (MCR) process to assess all potential opportunities for conversion of employment land for non-employment uses, at a set point in time (approximately every five years). As of October 20, 2024, requests to remove land from the Employment Area may occur at any time, provided that criteria in the PPS are met, including: an identified need for the removal; no impact to the city's ability to meet long term projected employment growth; no negative impact to the viability of the Employment Area; and, the availability of existing or planned infrastructure and public service facilities to serve the non-employment use. With this change, the previous protection of a decision from appeal under the MCR process no longer exists, allowing appeal of a refusal or non-decision for an employment land removal application.

These changes have necessitated amendments to the Employment Area policies of the Regional Official Plan, 1995, to ensure consistency with/conformity to the updated policy framework. The policies in this amendment are consistent with or in conformity to the in effect Provincial plans and policies at the time of approval, though they may be subject to change as the Ontario planning policy and regulatory landscape continues to evolve.

The Statutory Public Meeting about the Official Plan Amendment will be held on January 13, 2026. Comments received during the Statutory Public Meeting will be considered and any resulting changes to the OPA No. 7 policies will be presented to Council on March 4, 2026.

PART B – THE AMENDMENT**DETAILS OF THE AMENDMENT**

1.1 Text Changes

The amendment includes the changes to the text of the Burlington Official Plan, 2020 as described in the following table:

Item No.	Chapter/Section	Description of Change
1	CHAPTER 1 - INTRODUCTION SECTION 1.3 JURISDICTION	Delete the text “1994” in the first sentence and replace it with the text “1997” in Section 1.3, Jurisdiction.
2	CHAPTER 1 - INTRODUCTION SECTION 1.3 JURISDICTION NEW SUBSECTION 1.3.1 TRANSITION OF REGIONAL PLANNING RESPONSIBILITIES	<p>Add a NEW subsection after section 1.3, subsection 1.3.1, Transition of Regional Planning Responsibilities as follows:</p> <p>1.3.1 TRANSITION OF REGIONAL PLANNING RESPONSIBILITIES</p> <p>On July 1, 2024, through changes to the <i>Planning Act</i>, the Province identified the Region of Halton as an “upper-tier municipality without planning responsibilities”. As a result, the Regional Official Plan is no longer an official plan for the Regional Municipality of Halton. Instead, it has been deemed an official plan of each of the lower-tier municipalities in Halton (City of Burlington, Town of Halton Hills, Town of Milton, and Town of Oakville), until it is revoked or amended by the respective municipality.</p> <p>Until this Plan has been revised to reflect the transition of Regional planning responsibilities, any reference to the Regional Official Plan and its requirements <i>shall</i> be interpreted as a reference to an official plan/requirement of the City of Burlington.</p>

3	<p>CHAPTER 2 - SUSTAINABLE GROWTH</p> <p>SECTION 2.1 COMMUNITY VISION</p>	<p>Add a NEW paragraph after the 3rd paragraph of Section 2.1, Community Vision, as follows:</p> <p>A healthy and <i>sustainable</i> city provides opportunities to accommodate a wide range of businesses and economic activities throughout the city for long term economic competitiveness. Building on the city's strengths, over the planning horizon of this Plan, people will work throughout the city in the <i>Employment Area</i> designated for employment uses, in urban centres including the Downtown and Uptown, the <i>MTSAs</i>, and other mixed use areas, in the Rural Area and even in existing residential neighbourhoods in the form of <i>home occupations</i> and small-scale neighbourhood commercial uses.</p>
4	<p>CHAPTER 2 - SUSTAINABLE GROWTH</p> <p>SECTION 2.2.3 PROVINCIAL PLAN BOUNDARIES AND CONCEPTS</p> <p>NEW SUBSECTION 2.2.3(1) REVISED PROVINCIAL POLICY FRAMEWORK</p>	<p>Add a NEW subsection after Section 2.3.3, as follows:</p> <p>2.2.3(1) REVISED PROVINCIAL POLICY FRAMEWORK</p> <p>On October 20, 2024, the Provincial Policy Statement, 2020 (PPS, 2020) and A Place to Grow: Growth Plan for the Greater Golden Horseshoe 2019 (Provincial Growth Plan), were replaced by the Provincial Planning Statement, 2024 (PPS, 2024).</p> <p>However, in accordance with an administrative amendment to the Greenbelt Plan made on August 15, 2024, the policies of the PPS, 2020 and the Provincial Growth Plan will continue to apply where the Greenbelt Plan refers to them, as they read immediately before they were revoked.</p> <p>Until this Plan has been revised to reflect these changes to the Provincial planning framework, the interpretation of references to former requirements of the PPS, 2020 and the Provincial Growth Plan <i>shall</i> be guided by the policies of section 1.3, of this Plan.</p>

5	<p>CHAPTER 2 - SUSTAINABLE GROWTH</p> <p>SECTION 2.2 THE CITY SYSTEM</p> <p>SUBSECTION 2.2.4 POPULATION AND EMPLOYMENT DISTRIBUTION</p>	<p>Delete Subsection 2.2.4. in its entirety and replace it with NEW Subsection 2.2.4, as follows:</p> <p>2.2.4 POPULATION AND EMPLOYMENT DISTRIBUTION</p> <p>The Regional Official Plan established a growth strategy for the City of Burlington based on the distribution of population and employment to 2051. This distribution of population and employment <i>shall</i> be in accordance with Table 2: Intensification and Density Targets, and Table 2A: Regional Phasing, of the Regional Official Plan.</p> <table><tr><th colspan="3">Population*</th><th colspan="3">Employment</th></tr><tr><th>2021</th><th>2041</th><th>2051</th><th>2021</th><th>2041</th><th>2051</th></tr><tr><td>195,000</td><td>240,050</td><td>265,160</td><td>98,340</td><td>114,980</td><td>124,390</td></tr></table> <p>* Population numbers are “total population” numbers including approximately 4% under coverage from the official “Census Population” numbers reported by Statistics Canada.</p>	Population*			Employment			2021	2041	2051	2021	2041	2051	195,000	240,050	265,160	98,340	114,980	124,390
Population*			Employment																	
2021	2041	2051	2021	2041	2051															
195,000	240,050	265,160	98,340	114,980	124,390															
6	<p>CHAPTER 2 - SUSTAINABLE GROWTH</p> <p>SECTION 2.3 THE URBAN STRUCTURE</p>	<p>Add NEW preamble under Section 2.3, The Urban Structure, as follows:</p> <p>The <i>City’s</i> Urban Structure elaborates on the Urban Area, as identified on Schedule A: City System, of this Plan. The Urban Structure is composed of six major components: 1. Mixed Use <i>Intensification</i> Areas; 2. <i>Employment Area</i>; 3. Residential Neighbourhood Areas; 4. Natural Heritage System, Major Parks and Open Space; 5. Mineral Resource Extraction Area; and 6. Infrastructure and Transportation Corridors, as identified on Schedule B: Urban Structure, of this Plan and further described in Chapter 8: Land Use Policies – Urban Area, of this Plan.</p> <p>Each component of the Urban Structure performs a distinct function. Some components ensure long term</p>																		

		protection while others support growth, <i>intensification</i> and economic development.
7	<p>CHAPTER 2 - SUSTAINABLE GROWTH</p> <p>SECTION 2.3 THE URBAN STRUCTURE</p> <p>NEW SUBSECTION 2.3.2 EMPLOYMENT AREA</p>	<p>Add NEW subsection 2.3.2, as follows:</p> <p>2.3.2 EMPLOYMENT AREA:</p> <ul style="list-style-type: none"> a) Lands within the <i>Employment Area</i> as identified on Map 1H: Regional Urban Structure, of the Regional Official Plan, are protected for <i>employment</i> uses and in accordance with Provincial policy, are required to meet <i>employment</i> land needs projections to the planning horizon and beyond to support local competitiveness. b) The city has a finite supply of lands within the <i>Employment Area</i> and it is critical that the <i>City</i> protect that supply from removal from the <i>Employment Area</i> for non-<i>employment</i> uses. c) Any removal of lands from the <i>Employment Area</i> shall take place in accordance with provincial policy. d) <i>Employment</i> growth and <i>intensification</i> with a full range of scales and intensities of <i>development</i> shall be focused primarily in the <i>Employment Area</i> and in mixed use <i>intensification areas</i>. e) The <i>Employment Area</i> shall have the necessary <i>infrastructure</i> to support current and forecasted <i>employment</i> needs, including <i>infrastructure</i> and <i>utility</i> requirements of emerging <i>employment</i>.
8	<p>CHAPTER 3 – COMPLETE COMMUNITIES</p> <p>SECTION 3.2, PUBLIC SERVICE FACILITIES AND INSTITUTIONAL USES</p>	<p>Add NEW subsection 3.2.2, as follows:</p> <p>3.2.2 POLICIES</p> <ul style="list-style-type: none"> a) <i>Public service</i> facilities shall be permitted in all land use designations identified on Schedule C: Land Use – Urban Area, Schedule I: Land Use Rural Area and Schedule K: Land Use – North Aldershot; with the exception of designations located within the <i>Employment Area</i>, as identified on Map 1H:

	<p>NEW SUBSECTION 3.2.2 POLICIES</p>	<p>Regional Urban Structure, of the Regional Official Plan; and with the exception of the Natural Heritage System, Agricultural Area, and Mineral Resource Area designations of this Plan.</p> <p>b) In the Urban Area, <i>institutional uses shall</i> be permitted within all land use designations identified on Schedule C: Land Use – Urban Area, of this Plan, with the exception of land designations located within the <i>Employment Area</i>, as identified on Map 1-H: Regional Urban Structure, of the Regional Official Plan; and with the exception off the Natural Heritage System designation of this Plan. In the North Aldershot Area, <i>institutional uses may</i> be permitted within all land use designations identified on Schedule K: Land Use– North Aldershot, with the exception of the Greenlands (Escarpment Plan Area), Environmental Protection Area and North Aldershot Special Study Area land use designations, subject to meeting the conditions set out in Subsection 10.3.2 k) of this Plan.</p> <p>c) <i>Institutional uses</i> proposed within the Rural Area shall only be permitted to locate within the Rural Settlement Area designations as shown on Schedule I: Land Use – Rural Area, of this Plan.</p> <p>d) The implementing Zoning By-law <i>shall</i>:</p> <p>(i) subject to Subsections 3.2.2 a) and b) of this Plan, permit <i>public service facilities</i> and <i>institutional uses</i> within all Urban Area zones, with the exception of the zones implementing the Natural Heritage System designation and the designations within the <i>Employment Area</i>, provided such uses abut a Major Arterial, Multi-Purpose Arterial, Urban Avenue, Main Street, Neighbourhood Connector or Industrial Connector Street, as identified on Schedule O-1: Classification of</p>
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		<p>Transportation Facilities – Urban Area, of this Plan; and</p> <p>(ii) establish regulations, where appropriate, regarding the location and associated <i>development</i> standards for <i>public service facilities</i> and <i>Institutional uses</i> to achieve a high degree of <i>compatibility</i> with surrounding areas. Such regulations <i>may</i> include, but <i>shall</i> not be limited to: design standards, parcel size requirements, minimum setbacks and/or minimum separation distances from like uses or other <i>sensitive</i> land uses.</p> <p>e) Surplus <i>public service facilities</i> <i>may</i> be acquired by the <i>City</i> where such lands and/or buildings are required to fulfill a community need, are cost-effective, and in cases involving surplus public education facilities, the acquisitions are in accordance with the appropriate Ontario Regulation for surplus public education facilities.</p> <p>f) The co-location of more than <i>one public service facility</i> and/or <i>institutional</i> use within a single building, site or community hub is <i>encouraged</i>.</p> <p>g) The City will collaborate and consult with service planning, funding and delivery sectors to facilitate the co-ordination and planning of community hubs and other <i>public service facilities</i>.</p> <p>h) Notwithstanding Subsection 3.2.2 d)(i) of this Plan, existing <i>public education facilities</i> not abutting a Major Arterial, Multi-Purpose Arterial, Urban Avenue, Main Street, Neighbourhood Connector or Industrial Connector Street, as identified on Schedule O-1: Classification of Transportation Facilities – Urban Area, of this Plan, and located outside of the <i>Employment Area</i>, <i>shall</i> be a permitted use.</p>
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9	CHAPTER 5 – ECONOMIC ACTIVITY SECTION 5.5.1 OBJECTIVES	Delete subsection 5.5.1, Objectives
10	CHAPTER 5 – ECONOMIC ACTIVITY	Add NEW text as follows: [Chapter not in use.]
11	CHAPTER 7 – DESIGN EXCELLENCE SECTION 7.3 URBAN DESIGN AND BUILT FORM SUBSECTION 7.3.2(3) EMPLOYMENT GROWTH AREAS	Add NEW policy in subsection 7.3.2(3) a) (ix) a., as follows: (ix) in Urban Employment lands along the Provincial Freeway, as shown on Schedule O: Classification of Transportation Facilities – Urban Area, of this Plan: a. providing enhanced architectural quality and design elements for buildings and landscaping and screening, given the prestige nature of the land, to take advantage of the highway exposure; and
12	CHAPTER 8 – LAND USE POLICIES – URBAN AREA SECTION 8.1 MIXED USE INTENSIFICATION AREAS SUBSECTION 8.1.1(4) UPTOWN URBAN CENTRE	Delete subsection 8.1.1(4.1) b) in its entirety and replace with a NEW subsection 8.1.1(4.1) b) General Objectives as follows: b) To maintain the existing supply of <i>employment</i> lands and expand opportunities for higher <i>intensity office development</i> on those lands, where permitted.

13	<p>CHAPTER 8 - LAND USE POLICIES – URBAN AREA</p> <p>SECTION 8.1 MIXED USE INTENSIFICATION AREAS</p> <p>SUBSECTION 8.1.1(4.9) UPTOWN BUSINESS-EMPLOYMENT DESIGNATION</p>	<p>Insert NEW policy in Section 8.1.1(4.9), as follows:</p> <p>8.1.1 (4.9) UPTOWN URBAN EMPLOYMENT DESIGNATION</p> <p>8.1.1(4.9.1) OBJECTIVE</p> <p>a) To preserve the employment function on lands west of Appleby Line and provide for a broad range of employment uses which are generally compatible with <i>sensitive land uses</i> located in close proximity.</p> <p>8.1.1(4.9.2) POLICIES</p> <p>a) The following uses <i>may</i> be permitted on lands designated Uptown Urban Employment:</p> <ul style="list-style-type: none"> (i) manufacturing uses. Provided these uses are located within an enclosed building and are unlikely to cause <i>adverse effects</i> related to noise, vibration, odours or dust; (ii) research and development in connection to manufacturing; (iii) warehousing, including uses related to the movement of goods; (iv) <i>office</i> and retail uses associated with a use listed in subsections (i) to (iii) above; (v) facilities that are ancillary to the uses in subsections (i) to (iv) above; (vi) any other prescribed business and economic uses; and (vii) <i>institutional</i> and other uses not listed in (i.) to (v.) above, including retail and office uses, provided they were lawfully established on or before October 20, 2024.
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		<p>b) The following uses <i>shall</i> be prohibited within the Uptown Urban Employment designation:</p> <ul style="list-style-type: none"> (i) residential uses; (ii) commercial uses; (iii) <i>public service facilities</i>; (iv) <i>institutional uses</i>; (v) retail and <i>office</i> uses not associated with the primary <i>employment</i> use; and (vi) <i>sensitive land uses</i> that are not ancillary to uses permitted in the Urban Employment designation. <p>c) A maximum floor area ratio of <i>development</i> of 1.0:1 for <i>employment</i> uses <i>shall</i> be regarded as an appropriate built form in the Uptown Urban Employment designation. An increase to the floor area ratio <i>may</i> occur through a site-specific Zoning By-law amendment or minor variance application, without the need for an amendment to this Plan, provided that the objectives of the Uptown Urban Employment designation are maintained.</p> <p>d) The maximum building height <i>shall</i> not exceed four (4) storeys, except for <i>office</i> uses (when associated with a permitted use), where the maximum building height <i>shall</i> not exceed six (6) storeys.</p>
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14	<p>CHAPTER 8 – LAND USE POLICIES – URBAN AREA</p> <p>SECTION 8.1 MIXED USE INTENSIFICATION AREAS</p> <p>8.1.3(5) LOCAL CENTRE DESIGNATION</p> <p>8.1.3 (5.3)</p> <p>SITE-SPECIFIC POLICIES</p>	<p>Add New subsection 8.1.3 (5.3) d) as follows:</p> <p>d) The property located at 2258 Mountainside Drive <i>shall</i> be located within the Local Centre land use designation and subject to the policies of subsection 8.1.3 (5) of this Plan. Schedule C: Land Use: Urban Area <i>shall</i> be updated accordingly.</p> <p>e) The property located at 800 Burloak Drive <i>shall</i> be located within the Local Centre land use designation and subject to the following</p> <ul style="list-style-type: none"> (i) the policies of subsection 8.1.3 (5) of this Plan; and (ii) be in accordance with a Class 4 Area as defined by the Ontario Ministry of the Environment Environmental Noise Guideline Publication NPC-300. <p>Schedule C: Land Use: Urban Area <i>shall</i> be updated accordingly.</p>
15	<p>CHAPTER 8 – LAND USE POLICIES – URBAN AREA</p> <p>SECTION 8.2 EMPLOYMENT</p>	<p>Delete subsection 8.2 in its entirety and replace it with new subsection 8.2 as set out in Attachment 1.</p>
16	<p>SECTION 8.2 EMPLOYMENT</p> <p>SUBSECTION 8.2.3 GENERAL EMPLOYMENT DESIGNATION</p>	<p>Change the policy number of subsection 8.2.3(3), Site-Specific Policies, to subsection 8.2.2(5).</p>

	SUBSECTION 8.2.3(3) SITE- SPECIFIC POLICIES	
17	SECTION 8.3 RESIDENTIAL NEIGHBOURHOOD AREAS SUBSECTION 8.3.4 LOW-RISE NEIGHBOURHOODS LL SUBSECTION 8.3.4(2) SITE-SPECIFIC POLICIES	<p>Add New subsection 8.3.4 (2) e) as follows:</p> <p>The property located at 238 Sumach Drive <i>shall</i> be located within the Low-Rise Neighbourhoods II land use designation and subject to the policies of subsection 8.3.4 (2) of this Plan. Schedule C: Land Use: Urban Area <i>shall</i> be updated accordingly.</p>
18	SECTION 8.5 MINERAL RESOURCE EXTRACTION AREA	<p>Delete subsection 8.5 a) in its entirety and replace with a NEW subsection 8.5 a) Mineral Resource Extraction Area as follows:</p> <p>a) 5235 Dundas Street: Notwithstanding the other policies of this Plan, the existing shale <i>quarry</i> operation located at 5235 Dundas Street <i>shall</i> be subject to the following:</p> <p>(i) the <i>City shall</i> consider the shale <i>quarry</i> operation as <i>an interim land use</i> and <i>encourage</i> its progressive <i>rehabilitation</i> for an appropriate after-use subject to the policies of 8.2, Urban Employment; and</p>

19	<p>SECTION 8.8 SUB-AREA POLICIES</p> <p>SUBSECTION 8.8.1 TREMAINE DUNDAS COMMUNITY</p>	<p>Delete subsection 8.8.1 Preamble in its entirety and replace it with a NEW subsection 8.8.1 Preamble, as follows:</p> <p>The secondary plan includes a mix of land uses providing a range of opportunities for residential and <i>employment development</i>, in addition to parks and open space that maximize the <i>natural environment</i>. The <i>Employment Area</i> provided along Tremaine Road and Dundas Street will provide a range of opportunities including light industrial uses and associated office and retail uses, as permitted, that encourage live work proximity.</p>
20	<p>TREMAINE-DUNDAS</p> <p>8.8.1(2) GENERAL POLICIES</p>	<p>Delete subsection 8.8.1(2) e) in its entirety and replace with a NEW subsection 8.8.1(2) e) as follows:</p> <p>e) In addition to the policies found in Chapter 6: Infrastructure, Transportation and Utilities the following additional policies <i>shall</i> apply.</p> <ul style="list-style-type: none"> (i) extensive, single-use surface parking lots are discouraged in areas designated Urban Corridor and Urban Employment, located at the intersection of Dundas Street and Tremaine Road and bounded by the public road right-of-ways. Limited, short-term convenience parking is permitted in the Urban Corridor area to support the retail uses and is <i>encouraged</i> to be shared use parking where permitted. (ii) where surface parking lots are present in the area designated Urban Employment, not including the area located at the intersection of Dundas Street and Tremaine Road and bounded by public road right-of-ways, parking is <i>encouraged</i> to be located at the rear of buildings, away from street frontages in order to improve the quality of the public realm and minimize visual impact. (iii) in the area designated Urban Employment, located north of the intersection of Dundas Street

		<p>and Tremaine Road and south of the first public road right-of-way, parking is <i>encouraged</i> to be provided in the form of shared structured parking lots or underground parking garages.</p> <p>(iv) adequate vehicular and bicycle parking and storage facilities for residents, employees and visitors <i>shall</i> be provided in each of the land use areas to <i>encourage active transportation</i> and effective use of transit. Other transportation measures, such as electric vehicle charging stations, dedicated priority parking spaces for carpool, ride sharing and ultra low emission vehicles in parking areas of multistorey residential, and in the Urban Corridor and Urban Employment designations <i>shall</i> be considered and incorporated into future <i>development</i> where feasible.</p>
21	<p>TREMAINE-DUNDAS</p> <p>8.8.1(2) GENERAL POLICIES</p>	<p>Delete subsection 8.8.1(2) f) (v), (vi), (xviii) and (xix) and replace it with a NEW subsection 8.8.1(2) f) (v), (vi), (xviii) and (xix) as follows:</p> <p>(v) <i>Development</i> on lands designated Urban Employment is <i>encouraged</i> to incorporate <i>eco-Industrial Development</i> practices, through the incorporation of measures such as locally generated and shared energy sources, sharing waste heat, etc.</p> <p>(vi) <i>Development</i> on lands located along Tremaine Road, north of Dundas Street and the first public right-of-way, and designated Urban Employment, <i>should</i> promote the use of alternate modes of transportation: walking, cycling or transit and <i>encourages transportation demand management</i> techniques such as electric vehicle charging stations, car-pooling, other forms of ridesharing with incentives such as dedicated priority parking spaces for carpool, ride sharing, and ultra low</p>

		<p>emission vehicles through a minimum percentage of total parking spaces.</p> <p>(xviii) Incorporation of solar energy in the Urban Employment designations is <i>encouraged</i> to be located on the roofs of buildings to reduce lot coverage and improve the public realm. Excess energy produced through solar panels <i>may</i> be transmitted throughout the community to prevent the waste of energy and the reliance on other non-renewable energy sources.</p> <p>(xix) <i>Developments</i> on lands located along Tremaine Road, north of Dundas Street and the first public right-of-way and designated Urban Employment, are <i>encouraged</i> to incorporate visible green <i>infrastructure</i> technology into facades and signage, such as photovoltaic cells, recycled materials and green roofs.</p>
22	<p>TREMAINE-DUNDAS</p> <p>8.8.1(3.2) URBAN CORRIDOR – EMPLOYMENT DESIGNATION</p>	<p>Delete subsections 8.8.1(3.2) in its entirety and replace with NEW subsection 8.8.1(3.2) as follows:</p> <p>8.8.1 (3.2) URBAN EMPLOYMENT DESIGNATION</p> <p>a) The following uses <i>may</i> be permitted on lands designated Urban Employment in the Tremaine-Dundas Community:</p> <ul style="list-style-type: none"> (i) manufacturing; (ii) research and development in connection to manufacturing; (iii) warehousing, including uses related to the movement of goods; (iv) office and retail associated with a use listed in subsections i. to iii above; (v) facilities that are ancillary to the uses in subsections i. to iv above;

		<p>(vi) any other prescribed business and economic uses; and</p> <p>(vii) <i>institutional</i> and other uses not listed in subsections i. to v. above, including retail and office uses, provided they were lawfully established on or before October 20, 2024;</p> <p>b) The following uses <i>shall</i> be prohibited within the Urban Employment designation:</p> <ul style="list-style-type: none"> (i) residential uses; (ii) commercial uses; (iii) <i>public service facilities</i>; (iv) <i>institutional uses</i> (v) retail and <i>office</i> uses not associated with the primary employment use; and (vi) <i>sensitive land uses</i> that are not ancillary to uses permitted in the Urban Employment designation. <p>c) <i>Development</i> along the west side of Tremaine Road <i>shall</i> achieve land use compatibility with future <i>employment</i> uses along the east side of Tremaine Road, as well as with residential, mixed uses and Natural Heritage System areas located to the west within the secondary plan area.</p> <p>d) With the exception of the stormwater management ponds along Tremaine Road, <i>development</i> within the <i>Employment Area</i> <i>shall</i> create a continuous street frontage that complements the anticipated Town of Oakville Tremaine Road frontage and helps address potential noise compatibility concerns with future <i>employment</i> uses in the Town of Oakville.</p> <p>e) <i>Development</i> along Tremaine Road <i>shall</i> be a minimum of two storeys in height (or the equivalent height) to provide screening and buffering for residential <i>development</i> to the west.</p>
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		<p>f) <i>Development</i> that abuts residential areas will include adequate landscaping, fencing, noise abatement or other measures to achieve compatibility between uses.</p> <p>g) Loading, servicing and delivery functions <i>shall</i> be consolidated to the extent practical and <i>shall</i> generally be located to the rear of buildings and screened from public view.</p> <p>h) Outside storage <i>may</i> be permitted provided adequate screening and buffering is established.</p> <p>i) Lands within the <i>Urban Employment</i> designation <i>may</i> be used for stormwater management, including <i>Low Impact Development</i> features and naturalization, and for <i>enhancements</i> to <i>key natural features</i> as part of the natural heritage system.</p> <p>j) The <i>Employment Area</i> <i>shall</i> have a minimum of 70 - 90 m in depth (dependant on adjacent land use) to provide sufficient buffering between residential uses within the Tremaine Dundas Community and future potential industrial uses located within the Town of Oakville.</p> <p>k) For <i>Employment Area</i> lands along Tremaine Road, between Dundas Street and the first street right-of-way to the north of Dundas Street, in Phase 1 of the Tremaine-Dundas Community Secondary Plan, the following policies <i>shall</i> apply:</p> <p>(i) <i>development</i> on lands designated Urban Employment <i>shall</i> be a minimum of two storeys and a maximum of 6 stories although buildings located in close proximity to the intersection of Tremaine Road and Dundas Street <i>should</i> be a minimum of three storeys. Any increase in maximum height <i>shall</i> require a site specific Zoning By-law amendment and an air quality assessment to assess potential existing and future industrial and traffic impacts from the surrounding areas.</p>
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		<p>(ii) notwithstanding policy 8.8.1(3.2) h) outside storage shall not be permitted.</p> <p>(iii) lands within the Urban Employment designation <i>may</i> be used for stormwater management including <i>Low Impact Development</i> and naturalization with emphasis on creating more open green space between buildings.</p>
23	<p>TREMAINE-DUNDAS</p> <p>8.8.1(3.3) BUSINESS CORRIDOR DESIGNATION</p>	Delete subsection 8.8.1(3.3) in its entirety
24	<p>TREMAINE-DUNDAS</p> <p>8.8.1(4) IMPLEMENTATION POLICIES</p>	<p>Delete subsection 8.8.1(4) a) (i) a. and h. and replace with NEW subsection 8.8.1(4) a) (i) a. and h. as follows:</p> <p>a. Phase 1 will generally comprise the lands to the south and east of the Central Woodland, including the lands designated as Residential-Medium Density, Urban Corridor, and Urban Employment. Phase 2 <i>shall</i> include a maximum of 400 residential <i>dwelling units</i>.</p> <p>h. The <i>development</i> of employment areas within the Tremain Dundas Secondary Plan will be <i>encouraged</i> to occur concurrently with the <i>development</i> of nearby residential lands. If residential uses within 70 metres of an <i>employment</i> designation are developed prior to the <i>employment</i> uses within the Urban Employment blocks, excluding lands along Tremain Road between Dundas Street and the first street right-of-way to the north of Dundas Street, appropriate interim</p>

		noise mitigation measures and buffering <i>shall</i> be implemented to ensure compatibility with potential <i>employment</i> uses on the Town of Oakville lands in accordance with the recommendations of a Land Use Compatibility Assessment and Detailed Noise Study.
25	<p>CHAPTER 12 – IMPLEMENTATION AND INTERPRETATION</p> <p>SUBSECTION 12.1.1(3) OFFICIAL PLAN</p>	<p>Add NEW subsection 12.1.1 (3) c) as follows:</p> <p>c) Urban boundary expansions and removal of land from the <i>Employment Area</i> may be considered in accordance with provincial policy.</p>
26	<p>CHAPTER 12 – IMPLEMENTATION AND INTERPRETATION</p> <p>NEW SUBSECTION 12.1.1.(4) TERTIARY PLANS</p>	<p>Add New subsection 12.1.1 (4) as follows:</p> <p>12.1.1(4) Tertiary Plans:</p> <p>b) A Tertiary Plan <i>shall</i> provide a framework for the distribution of <i>development</i> to ensure the shared delivery of streets and blocks, parks and open space, <i>public realm</i> and streetscapes, parking, cycling facilities, transit amenities, site access, pedestrian connections, and <i>infrastructure</i>.</p> <p>c) A Tertiary Plan <i>shall</i> be informed by relevant transportation and <i>infrastructure</i> planning, applicable area specific visions and the permitted uses of this Plan and a <i>Community Planning Permit System</i> By-law.</p> <p>d) A Tertiary Plan and cost-sharing agreement(s) <i>shall</i> be prepared by the landowners group, in</p>

		<p>consultation with applicable agencies, to the satisfaction of the <i>City</i> and the Region of Halton, as applicable prior to the approval of any <i>development application</i> to ensure that the costs associated with the provision of parkland, parking, <i>infrastructure</i> and servicing are distributed in an equitable and fair manner among the landowners.</p> <p>e) The <i>City may</i> consider waiving the requirement for a Tertiary Plan if it can be demonstrated that the proposed <i>development</i> is delivering the elements identified in Subsection 12.1.1 (4) e), of this Plan, or that those elements are achieved elsewhere.</p> <p>f) A Tertiary Plan <i>shall</i> contribute to <i>complete community</i> elements that <i>may</i> include, but are not limited to, the following:</p> <ul style="list-style-type: none"> (i) transportation, enhanced <i>active transportation</i> facilities, including pedestrian, cycling and transit stops trail connections, truck priority routes and other potential network improvements, along with an assessment of the function, ownership, cross-section, alignment and design of transportation connections, including connections across railways that have been identified; (ii) proposed layout of streets, lanes and <i>development</i> blocks; (iii) the provision of water and wastewater servicing <i>infrastructure</i>, including the confirmation that the existing water and wastewater systems can accommodate the proposed <i>development</i>; (iv) provision and location of stormwater management facilities and/or green <i>infrastructure</i>; (v) an assessment of the need for, and recommended location of pedestrian connections,
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		<ul style="list-style-type: none"> (vi) The distribution of height and density while having regard for transition to adjacent areas characterized by lower heights, densities, or sensitivities; (vii) the location, size and configuration of new required parks and open spaces, including <i>linear parks and greenways</i>; (viii) new <i>public service facilities</i> and <i>Institutional uses</i>, along with an assessment of function, configuration and ownership; (ix) the location and configuration of retail and <i>service commercial</i> floor area; (x) The provision of additional needs housing, assisted housing and affordable housing in accordance with Section 3.1 of this Plan; (xi) the relationship to abutting precincts and surrounding areas; (xii) demonstration of land use <i>compatibility</i>, including any mitigation requirements, to the satisfaction of the <i>City</i>; and (xiii) provision and location of flood hazard mitigation, as required; <p>g) The <i>City may</i> identify and deem necessary future areas that <i>may</i> require tertiary planning or equivalent to ensure <i>development</i> provides for <i>complete community</i> and <i>infrastructure</i> elements. The Tertiary Plan will be authorized by <i>City</i> staff and does not require Council approval.</p> <p>h) Landowners are <i>encouraged</i> to work together to complete a Tertiary Plan however, an individual landowner <i>may</i> complete the Tertiary Plan for the entire Tertiary Plan area if other landowners decide not to participate.</p> <p>i. Where a Tertiary Plan is required, the following <i>may</i> be requested for all properties within the Tertiary</p>
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		<p>Plan area. prior to the approval of a <i>Community Planning Permit</i> application:</p> <ul style="list-style-type: none"> (i) Traffic Impact Assessment or equivalent; (ii) Parking Study; (iii) Functional Servicing Report; (iv) Stormwater Management Plan; (v) Environmental Impact Assessment; (vi) Urban Design Brief; (vii) Cost Sharing Analysis; (viii) Market Impact Study; (ix) Development Phasing Plan; (x) Cultural Heritage Impact Assessment; (xi) Natural Hazard Technical Study; and (xii) other supporting information and material that <i>may</i> be requested during the pre-consultation process and any other supporting information or material that the <i>City</i> requires to undertake a comprehensive review of the proposal. <p>j. For lands that are not subject to a Tertiary Plan, a shared distribution of the responsibility among landowners to provide street <i>infrastructure</i> and <i>active transportation</i> connections to contribute to the <i>public realm</i> is required through the comprehensive planning of contiguous lots, where applicable, based on good planning principles.</p> <p>k. Lands required to accommodate grade crossings, as identified in a Tertiary Plan and confirmed through a Municipal Class Environmental Assessment, <i>shall</i> be dedicated to the City.</p>
27	CHAPTER 12 – IMPLEMENTATION AND INTERPRETATION	<p>Add NEW Subsection 12.1.3 (2) a) as follows:</p> <p>a) The policies of this Plan identify where <i>area-specific plans</i> are required to appropriately guide <i>development</i>. <i>Area-specific plans shall</i> be prepared</p>

	<p>SUBSECTION 12.1.3 PLANNING PROCESS: AREA SPECIFIC PLANNING</p> <p>SUBSECTION 12.1.3(2) AREA- SPECIFIC PLANNING POLICIES</p>	<p>for vacant <i>Designated Growth Areas</i>, and existing and future <i>Major Transit Station Areas</i> where the <i>City</i> has an interest in guiding major change.</p>
28	<p>CHAPTER 12 – IMPLEMENTATION AND INTERPRETATION</p> <p>SUBSECTION 12.1.14 COMMUNITY PLANNING PERMIT SYSTEMS</p> <p>NEW SUBSECTION 12.1.14 (4) EMPLOYMENT AREA COMMUNITY PLANNING PERMIT SYSTEM POLICIES</p>	<p>Insert a NEW subsection 12.1.14(4) as follows:</p> <p>12.1.14 (4) EMPLOYMENT AREA COMMUNITY PLANNING PERMIT SYSTEM POLICIES</p> <p>a) The <i>City</i> may prepare a <i>Community Planning Permit System</i> for the following areas, as shown on Map 1-H: Regional Urban Structure, of the Regional Official Plan:</p> <p>(i) <i>Employment Area</i> Lands within the <i>Protected Major Transit Station Area</i> boundary, as identified in Schedule B-3 Employment Area of this Plan, are excluded from the <i>Employment Area Community Planning Permit System</i></p> <p>b) The <i>Community Planning Permit System</i> policies for the <i>Employment Area</i> shall be developed through an amendment to this Plan in accordance with Reg 173/16 and The Planning Act.</p>
29	<p>CHAPTER 13 – DEFINITIONS</p>	<p>Add NEW definition for “Ancillary Employment Use”, as follows:</p>

	ANCILLARY EMPLOYMENT USE	Ancillary Employment Use – The use of any land, building or structure which is subordinate to uses in the surrounding <i>Employment Area</i> and primarily provides its service to the uses, businesses and employees in the surrounding <i>Employment Area</i> . An <i>ancillary employment use</i> may include facilities that are ancillary to the uses permitted in Subsection 8.2.2 b) in Subsections (i) to (iv) of this Plan.
30	CHAPTER 13 – DEFINITIONS EMPLOYMENT AREA	<p>Insert NEW definition for “Employment Area” as follows:</p> <p>Employment Area - An “area of employment” as defined in the <i>Planning Act</i>, as an area of land designated in an official plan for clusters of business and economic uses, those uses that meet the following criteria:</p> <ol style="list-style-type: none"> 1. The uses consist of business and economic uses, other than uses referred to in paragraph 2, including any of the following: <ol style="list-style-type: none"> (i) manufacturing uses; (ii) uses related to research and development in connection with manufacturing; (iii) warehousing uses, including uses related to the movement of goods; (iv) retail uses and office uses that are associated with uses mentioned in subparagraphs i to iii; (v) facilities that are ancillary to the uses mentioned in subparagraphs i to iv; and (vi) any other prescribed business and economic uses; and (vii) <i>institutional</i> and other uses not listed in (i.) to (v.) above, including retail and office uses, provided they were lawfully established on or before October 20, 2024. 2. The uses are not any of the following uses: <ol style="list-style-type: none"> (i) <i>institutional uses</i>; and

		(ii) commercial uses, including retail and office uses not referred to in subparagraph 1 iv.
31	<p>CHAPTER 13 – DEFINITIONS</p> <p>EMPLOYMENT</p>	<p>Add NEW definition for “Employment” as follows:</p> <p>Employment – The use of lands for business and economic activities, in accordance with the land use permissions of this Plan. <i>Employment</i> uses <i>may</i> include, but are not limited to, manufacturing, warehousing, offices and <i>ancillary employment uses</i>, but do not include retail and <i>service commercial</i> uses unless they are an <i>ancillary employment use</i>.</p>
32	<p>CHAPTER 13 - DEFINITIONS</p> <p>DESIGNATED GROWTH AREA</p>	<p>Add NEW definition for “Designated Growth Area” as follows:</p> <p>Designated Growth Area - means lands within <i>settlement areas</i> designated for growth or lands added to <i>settlement areas</i> that have not yet been fully developed. Designated growth areas include lands which are designated and available for residential growth in accordance with provincial policy, as well as lands required for <i>employment</i> and other uses.</p>

1.2 Map Changes

The following Schedules in Attachment 2 to OPA 7 are hereby added to the Burlington Official Plan, 2020 as follows.

Item No.	Schedule	Description of Change
	Schedule C-1: Employment Area	Insert new Schedule C-1: Employment Area – Urban Employment Land Use as identified in Attachment 2.
38	Schedule R: Tremaine-Dundas Community	Delete Schedule R: Tremaine-Dundas Community and replace with NEW Schedule R as identified in Attachment 2.
40	Schedule O-1: Classification of Transportation Facilities - Urban Area	Delete Schedule O-1: Classification of Transportation Facilities - Urban Area and replace with NEW Schedule O-1 as identified in Attachment 2.

Attachment 1 to OPA 7 – 8.2 Urban Employment

8.2 Urban Employment

The lands identified as Urban Employment on Schedule C-1: Land Use – Urban Employment, of this Plan, are designated for clusters of business and economic uses including manufacturing, research and *development* in connection with manufacturing, warehousing, goods movement, associated retail and *office*, and ancillary facilities.

The Urban Employment designation addresses the range of permitted uses, the scale and intensity of the *development* allowed, the design standards that *shall* apply, and the requirements for land use compatibility.

The objective of the Urban Employment policies is to ensure opportunities to accommodate *employment* to the planning horizon of this Plan and beyond. There will be very limited, if any, opportunities to designate additional *employment* land in the future. Employment growth, beyond 2031, will be accommodated primarily through *intensification*.

8.2.1 Objectives

- a) To maintain a sufficient supply of land within the Urban Area for *employment* in order to achieve the *City's employment* forecasts;
- b) To provide appropriate locations for *employment* uses that have features that are not *compatible* with other land uses;
- c) To maintain the primary function and long term viability of lands designated for *employment* uses;
- d) To ensure an adequate supply of land designated for *employment* to allow for choice in terms of location, size of property and servicing needs. It is the general intent of this Plan that the supply of *Employment Area* land *shall* not be reduced through removal from the *Employment Area* to permit non-*employment* uses, except in accordance with provincial policies;
- e) To provide some locations in the Urban Employment designation for low-intensity, *employment* uses, that have a limited effect on the surrounding environment and that are generally small-scale in accordance with provincial policy. These uses can generally be located close to sensitive land uses, including residential land uses, without significant *adverse effects* if appropriate site plan design features and mitigation measures are incorporated;
- f) To develop existing lands designated for *employment* uses in a manner that efficiently uses existing *infrastructure* and land, and supports *intensification*;

- g) To locate manufacturing uses so as to provide convenient access to *infrastructure* such as rail sidings, high voltage power lines, high pressure and capacity gas lines, and critical high tech *infrastructure* and heavy truck roadbeds and truck routes in accordance with Chapter 6 of this Plan;
- h) To expand access to lands designated for *employment* uses with frequent and tailored transit service and the *development* of *transit-supportive employment* facilities to respond to the needs of employees and businesses;
- i) To improve existing conditions for walking, cycling, and transit usage throughout the *Employment Area* by rebalancing the right-of-way, and developing new transit *infrastructure* and a spine network of high-quality pedestrian pathways and cycling facilities where supported by appropriate environmental studies; and
- j) To support the *development* of new connections to cross key, major barriers, as identified in the *City's* Integrated Mobility Plan.
- k) To establish a tertiary planning framework that recognizes areas within the *Employment Area* and provide direction on street network, *active transportation*, and servicing *infrastructure* consistent with the *City's* Integrated Mobility Plan.

8.2.2 Policies

- a) All lands identified as *Employment Area* on Map 1-H: Regional Urban Structure, of the Regional Official Plan, *shall* be designated Urban Employment Area and subject to the policies of Section 8.2 except for those lands located within:
 - (i) Downtown Burlington Urban Growth Centre/Major Transit Station Area
 - (ii) Aldershot GO Major Transit Station Area
 - (iii) Appleby GO Major Transit Station Area
 - (iv) Uptown Urban Centre
 - (v) Tremaine-Dundas Community
- b) The following uses *may* be permitted within the Urban Employment designation:
 - (i) manufacturing;
 - (ii) research and development in connection to manufacturing;
 - (iii) warehousing, including uses related to the movement of goods;
 - (iv) office and retail uses associated with a use listed in subsections (i) to (iii) above;
 - (v) facilities that are ancillary to the uses in subsections (i) to (iv) above;
 - (vi) any other prescribed business and economic uses; and

- (vii) institutional and other uses not listed in (i.) to (v.) above, including retail and office uses, provided they were lawfully established on or before October 20, 2024.
- (viii) notwithstanding policy 8.2.2 b), the following uses *shall* be prohibited within the Urban Employment designation:
 - a. residential uses;
 - b. commercial uses;
 - c. *public service facilities*;
 - d. *institutional uses*;
 - e. retail and *office* uses not associated with the primary employment use; and
 - f. *sensitive land uses* that are not *ancillary* to uses permitted in the Urban Employment land use designation
- c) A sufficient supply of land designated for *employment shall* be maintained within the Urban Area to provide an adequate supply of serviced land and an allowance for choice in terms of location, size of property and servicing needs to the planning horizon of this Plan and beyond.
- d) A range of building heights and *development* intensities *shall* be permitted within areas designated as *Employment Area*.
- e) In addition to being subject to the land use compatibility policies in Section 4.6, Land Use Compatibility, of this Plan, *development* in the *Employment Area shall*:
 - (i) provide an appropriate transition to adjacent non-employment areas to ensure land use compatibility and economic viability of the *Employment Area*; and
 - (ii) where *development* abuts existing or future residential areas, provide landscaping and other site plan design elements in order to create an aesthetically pleasing environment for residents.

8.2.2 (1) Infrastructure

- a) *Infrastructure* will be delivered in accordance with Section 6.1 of this Plan, the Regional Official Plan and the Region of Halton's Integrated Master Plan.
- b) *Development shall* be aligned with road and *infrastructure* projects, where deemed appropriate by the *City*.

8.2.2 (2) Transportation Network

- a) An integrated *multi-modal* transportation system including but not limited to the location and design of streets, active transportation and connections (pedestrian cycling and micromobility), transit, rail services, air services and goods movement *shall* be provided in accordance with Section 6.2 of this Plan and the *City's Integrated Mobility Plan*.
- b) The ultimate location and design of any new streets, whether identified on Schedule O-1 Classification of Transportation Facilities - Urban Area, of this Plan, or through the *City's Integrated Mobility Plan*, or through other policy, *shall* be reviewed through a *development* application, or an *Environmental Assessment* process in accordance with the design parameters of Table 1: Classification of Transportation Facilities, of this Plan
- c) Streets *shall* be planned as *complete streets* in accordance with the policies of this Plan, any applicable strategies and Council-approved guidelines.
- d) The design of the *public realm* and the private realm *should* be coordinated to provide attractive streetscapes throughout the *Employment Area*.
- e) Streetscape improvements will be scheduled and phased appropriately with road and *infrastructure* projects.
- f) *Development shall* ensure pedestrian comfort, safety, and accessibility are maintained on streets that also accommodate goods movement by applying design measures that minimize conflicts and support a high-quality walking environment.

8.2.2 (2.1) Linkages and Connections

- a) Laneways and midblock connections, including *active transportation* connections, *may* be considered to support site permeability and enhance pedestrian access.
- b) A Municipal Class *Environmental Assessment shall* be required to determine the need, feasibility and location of major grade separated crossing connection that support the goals and objectives of the *City's Integrated Mobility Plan* and consider rebalancing the transportation network and required people movement capacity in the following areas:
 - (i) a north-south grade separated crossing and enhanced *active transportation* facilities connecting the north end of Century Drive across the QEW, extending from Sutton Drive to Century Drive as shown on Figure 6-7: Preferred Integrated Network in the Integrated Mobility Plan.

- (ii) a north-south grade separated crossing and enhanced *active transportation* facilities connecting the west end of Industrial Street across the QEW to Industrial Street as shown on Schedule O-1 Classification of Transportation Facilities - Urban Area
- c) Areas identified through the *City's* Integrated Mobility Plan as *multi-modal* corridors to support access to key growth and *intensification* areas *shall* be protected and planned to enable their future implementation. These *multi-modal* corridors *may* include, but are not limited to:
 - (i) Cumberland Avenue Extension (Harvester Road to Mainway)
 - (ii) Harvester Road (Guelph Line to Burloak Drive)

The final location, design and public right-of-way widths of these corridors will be determined as part of future studies including Tertiary Planning, Environmental Assessments and/or subdivision approvals in accordance with the policies of this Plan.

8.2.2 (3) Parks and Open Space

- a) *Development* within the *Employment Area* *may* consider providing amenity space facilities to support employees associated with a permitted use. Such amenity space could include Privately-Owned Publicly Accessible Spaces (POPS) and *shall* not include play structures or other uses that would impact land use *compatibility*.
- b) Privately-Owned Publicly Accessible Spaces (POPS) *shall* be subject to all applicable parks policies of this Plan, as well as Appendix B of the *City's* Parks Provisioning Master Plan and the Park Dedication By-law.

8.2.2 (4) Implementation

8.2.2 (4.1) Tertiary Plans

- a) The *City* *may* prepare a Tertiary Plan *for* areas surrounding the following corridors within the *Employment Area*, to establish a transportation and *infrastructure* focused framework that supports coordinated planning and *development*:
 - (i) Cumberland Avenue Extension (Harvester Road to Mainway)
 - (ii) Harvester Road (Guelph Line to Burloak Drive)

- (iii) North-south grade separated crossing and enhanced active transportation facilities connecting the north end of Century Drive across the QEW, extending from Sutton Drive to Century Drive as shown on Figure 6-7: Preferred Integrated Network in the Integrated Mobility Plan.
 - (iv) North-South grade separated crossing connecting the west end of Industrial Street across the QEW to Industrial Street as shown on Figure 6-7: Preferred Integrated Network in the Integrated Mobility Plan.
- b) A Tertiary Plan will further articulate the policies of this Plan and will provide specific *development* principles and guidelines that are not part of the broader Official Plan.

8.2.2 (4.2) Phasing and Monitoring

- a) The timing of *development* will be subject to the availability of required *infrastructure* including transportation, water and wastewater servicing.
- b) The *City* will collaborate with the Region of Halton and other service and *utility* providers to support timely investments in sustainable *infrastructure*, *utilities* and services to support growth and *intensification* in accordance with Section 12.1.21, of this Plan.

8.2.2 (5) Site Specific Policies

SCHEDULE C-1

Land Use - Urban Employment

City of Burlington

Attachment 2 to Draft OPA 7

RURAL AREA

Legend

URBAN EMPLOYMENT



MIXED USE INTENSIFICATION AREAS



Major Transit Station Areas¹

Contextual References



Urban Growth Centre/Protected
Major Transit Station Area



Protected Major Transit Station Area



Municipal Boundary



Urban Boundary



Urban Area



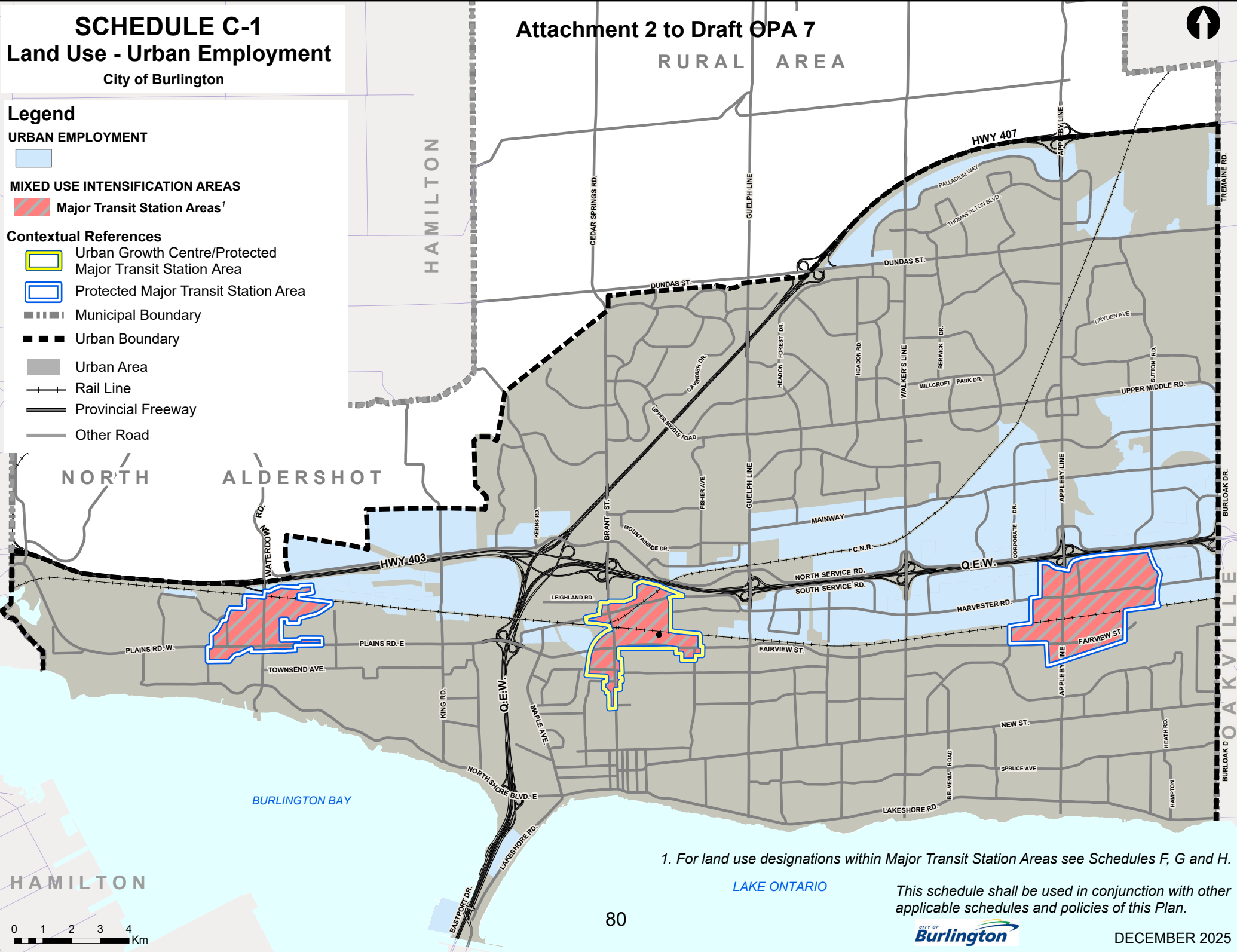
Rail Line



Provincial Freeway



Other Road



1. For land use designations within Major Transit Station Areas see Schedules F, G and H.

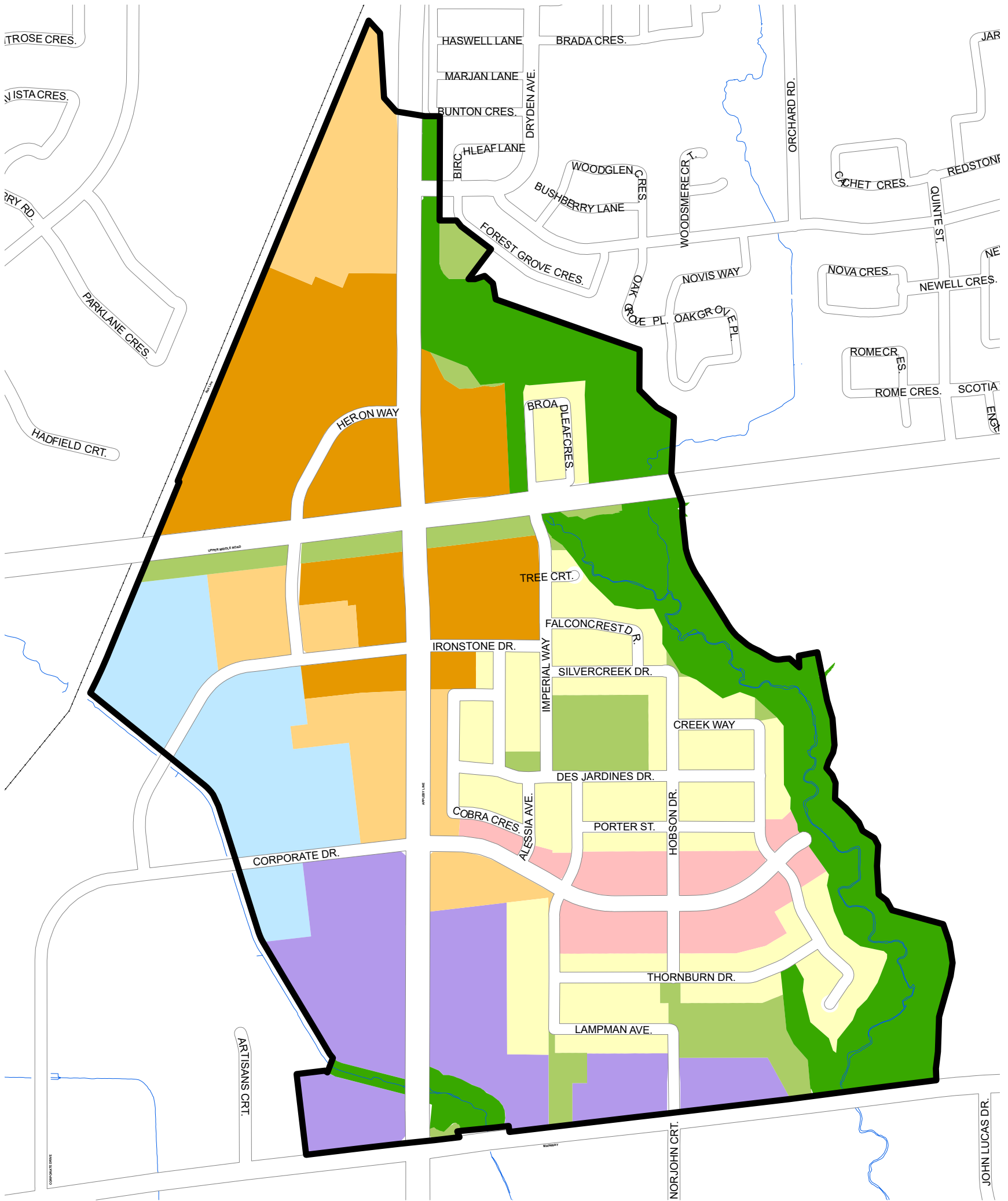
LAKE ONTARIO

This schedule shall be used in conjunction with other applicable schedules and policies of this Plan.



DECEMBER 2025

SCHEDULE E
Land Use - Uptown Urban Centre
City of Burlington



Legend

- | | |
|---|---|
|  Uptown Core |  Uptown Urban Employment |
|  Uptown Corridor |  City's Natural Heritage System |
|  Uptown Local Corridor |  Uptown Major Parks and Open Space |
|  Uptown Residential Low-Rise Neighbourhoods II |  Utility Corridor |
|  Uptown Business Corridor-Employment |  Uptown Urban Centre Boundary |



This schedule shall be used in conjunction with other applicable schedules and policies of this Plan.
OCTOBER 2025

Schedule O-1
Classification of Transportation Facilities - Urban Area
City of Burlington

Attachment 2 to Draft OPA 7

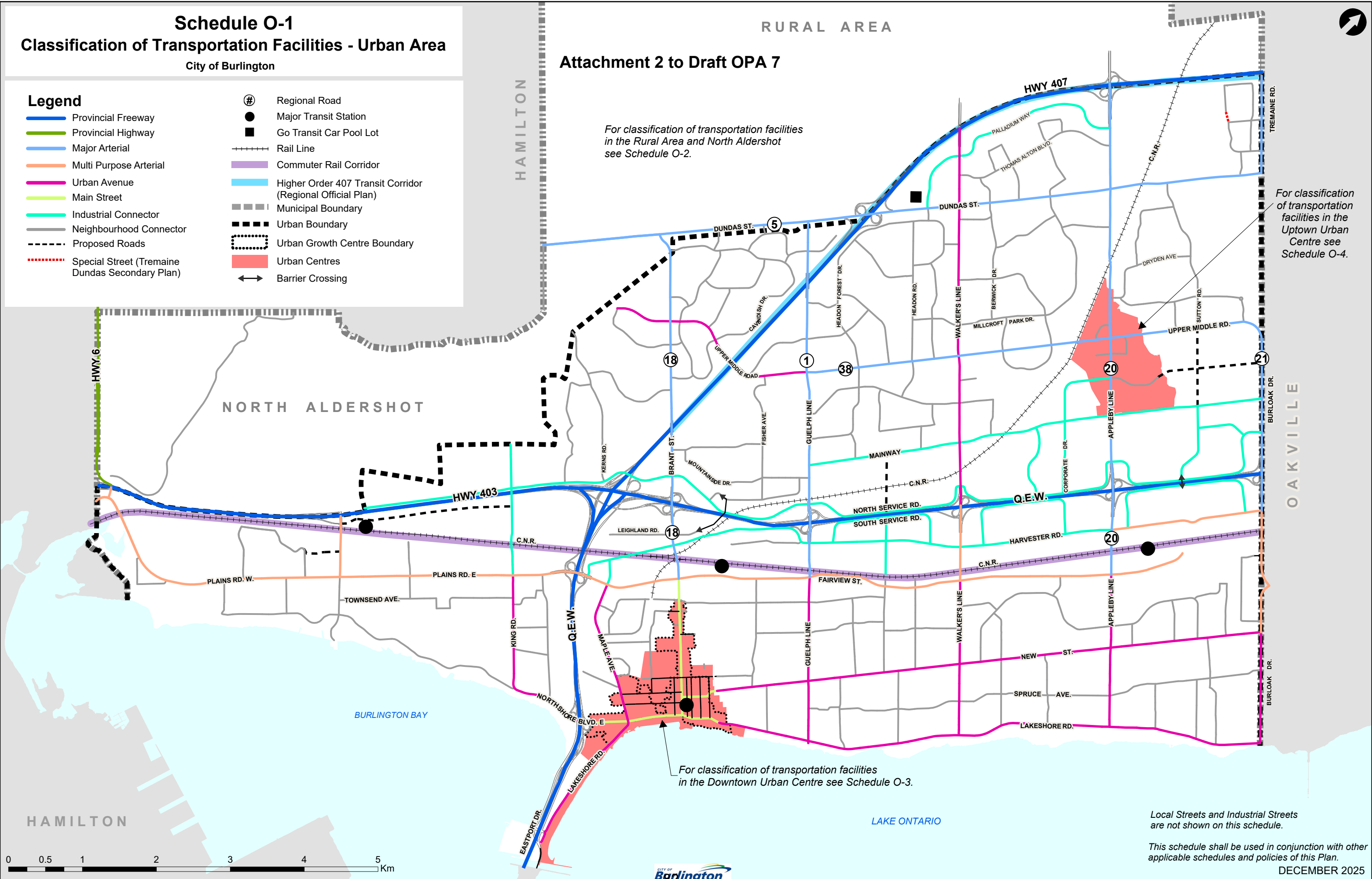
- Legend**
- Provincial Freeway
 - Provincial Highway
 - Major Arterial
 - Multi Purpose Arterial
 - Urban Avenue
 - Main Street
 - Industrial Connector
 - Neighbourhood Connector
 - Proposed Roads
 - Special Street (Tremaine Dundas Secondary Plan)
 - Regional Road
 - Major Transit Station
 - Go Transit Car Pool Lot
 - Rail Line
 - Commuter Rail Corridor
 - Higher Order 407 Transit Corridor (Regional Official Plan)
 - Municipal Boundary
 - Urban Boundary
 - Urban Growth Centre Boundary
 - Urban Centres
 - Barrier Crossing

For classification of transportation facilities in the Rural Area and North Aldershot see Schedule O-2.

For classification of transportation facilities in the Uptown Urban Centre see Schedule O-4.

For classification of transportation facilities in the Downtown Urban Centre see Schedule O-3.

Local Streets and Industrial Streets are not shown on this schedule.
This schedule shall be used in conjunction with other applicable schedules and policies of this Plan.
DECEMBER 2025







SCHEDULE R


Tremaine-Dundas Community

City of Burlington

Legend

-  Tremaine Dundas Secondary Plan boundary
-  Phasing
-  Area for Future Study
-  Special Street (Tremaine Dundas Secondary Plan)



RESIDENTIAL NEIGHBOURHOOD AREAS

-  Low-Rise Neighbourhoods II

URBAN EMPLOYMENT

- 

NATURAL HERITAGE SYSTEM AND MAJOR PARKS AND OPEN SPACE

-  City's Natural Heritage System
-  Major Parks and Open Space



MINERAL RESOURCE EXTRACTION AREA

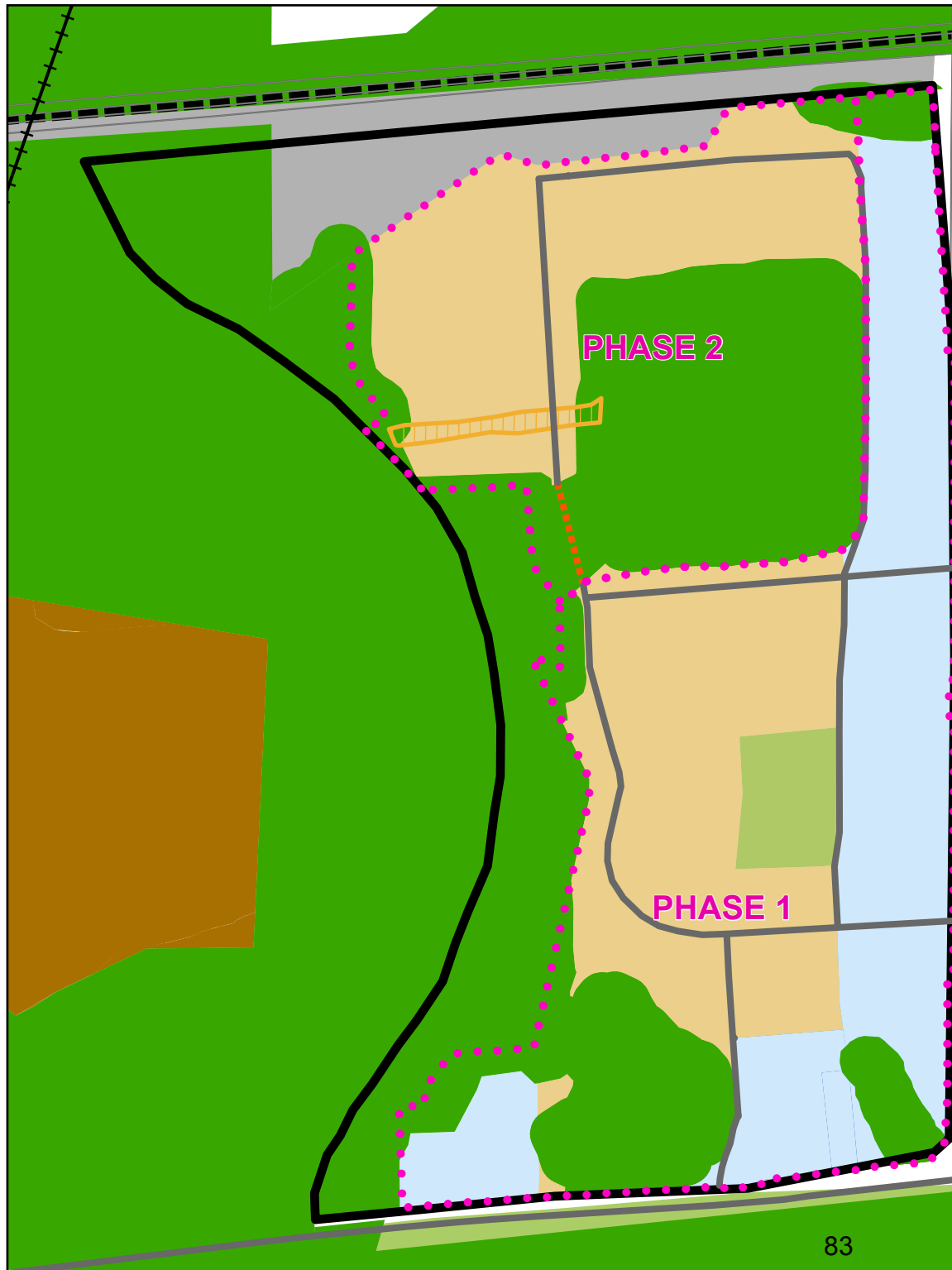
- 

INFRASTRUCTURE AND TRANSPORTATION CORRIDORS

- 

CONTEXTUAL REFERENCES

-  Municipal Boundary
-  Urban Boundary



OAKVILLE

PHASE 2

PHASE 1

Appendix C: Burlington Official Plan, 2020 Amendment No. 7. Tracked Changes

The below table provides a tracked changes version of the draft proposed amendments to the Burlington Official Plan, 2020 (OPA No. 7).

In the “Description of Change” column, text that is underlined is new text to be inserted into the Burlington Official Plan, 2020 by way of changes to the in-effect policies. Text that is crossed out (“~~strikethrough~~”) is to be deleted from the Plan.

Item No.	Chapter/Section	Description of Change
1	CHAPTER 1 - INTRODUCTION SECTION 1.3 JURISDICTION	<p>Delete the text “1994” in the first sentence and replace it with the text “1997” in Section 1.3, Jurisdiction.</p> <p>This Official Plan replaces the 1994 <u>1997</u> Official Plan, as amended, and was prepared to conform to Provincial land use plans and regulations and to the Region of Halton</p> <p>Official Plan, and to be consistent with Provincial Policy Statements and Guidelines. Burlington's Official Plan policies reflect the City's individual community interests within the Provincial and Regional planning frameworks. In this manner, the Plan <i>may</i> be more restrictive than the policies contained in Provincial and Regional Government planning documents but is not permitted to conflict with these documents.</p>
2	CHAPTER 1 - INTRODUCTION NEW SUBSECTION 1.3.1 TRANSITION OF REGIONAL PLANNING RESPONSIBILITIES	<p>Add a NEW subsection after section 1.3, subsection 1.3.1, Transition of Regional Planning Responsibilities as follows:</p> <p><u>1.3.1 TRANSITION OF REGIONAL PLANNING RESPONSIBILITIES</u></p> <p><u>On July 1, 2024, through changes to the Planning Act, the Province identified the Region of Halton as an “upper-tier municipality without planning responsibilities”. As a result, the Regional Official Plan is no longer an official plan for the Regional Municipality of Halton. Instead, it has been deemed an official plan of each of the lower-tier municipalities in Halton (City of Burlington, Town of Halton Hills, Town of Milton, and Town of Oakville), until it is revoked or amended by the respective municipality.</u></p>

		Until this Plan has been revised to reflect the transition of <u>Regional planning responsibilities</u> , any reference to the <u>Regional Official Plan and its requirements</u> shall be interpreted as a reference to an official plan/requirement of the <u>City of Burlington</u> .												
3	CHAPTER 2 - SUSTAINABLE GROWTH SECTION 2.1 COMMUNITY VISION	Add a NEW paragraph after the 3rd paragraph of Section 2.1, Community Vision, as follows: <u>A healthy and sustainable city provides opportunities to accommodate a wide range of businesses and economic activities throughout the city for long term economic competitiveness. Building on the city's strengths, over the planning horizon of this Plan, people will work throughout the city in the <i>Employment Area</i> designated for employment uses, in urban centres including the Downtown and Uptown, the MTSAs, and other mixed use areas, in the Rural Area and even in existing residential neighbourhoods in the form of home occupations and small-scale neighbourhood commercial uses.</u>												
4	CHAPTER 2 - SUSTAINABLE GROWTH SECTION 2.2 THE CITY SYSTEM SUBSECTION 2.2.4 POPULATION AND EMPLOYMENT DISTRIBUTION	Delete Subsection 2.2.4. in its entirety and replace it with a NEW Subsection 2.2.4, as follows The Regional Official Plan established a growth strategy for the Region of Halton <u>City of Burlington</u> based on the distribution of population and employment to 2034 <u>2051</u> . (Table 1: Population and Employment Distribution, of the Regional Plan). This distribution of population and employment <i>shall</i> be in accordance with Table 2: Intensification and Density Targets, and Table 2A: Regional Phasing, of the Regional Official Plan. <table><tr><th colspan="2">Population*</th><th colspan="2">Employment</th></tr><tr><th>2006</th><th>2031</th><th>2006</th><th>2031</th></tr><tr><td>171,000</td><td>193,000</td><td>88,000</td><td>106,000</td></tr></table>	Population*		Employment		2006	2031	2006	2031	171,000	193,000	88,000	106,000
Population*		Employment												
2006	2031	2006	2031											
171,000	193,000	88,000	106,000											

		<u>Population*</u>			<u>Employment</u>		
		<u>2021</u>	<u>2041</u>	<u>2051</u>	<u>2021</u>	<u>2041</u>	<u>2051</u>
		<u>195,000</u>	<u>240,050</u>	<u>265,160</u>	<u>98,340</u>	<u>114,980</u>	<u>124,390</u>
		* Population numbers are “total population” numbers including approximately 4% under coverage from the official “Census Population” numbers reported by Statistics Canada.					
5	CHAPTER 5 – ECONOMIC ACTIVITY	Delete subsection 5.5.1, Objectives, as follows: 5.5.1 OBJECTIVES a) To support the economic viability of agriculture and the agricultural system. b) To enable agriculture and the agricultural system to adapt to new challenges and new opportunities. c) To promote efficient agricultural operations. d) To encourage and promote local food production, including urban agriculture.					
6	CHAPTER 5 – ECONOMIC ACTIVITY	Add NEW text as follows: <u>[Chapter not in use]</u>					
7	CHAPTER 8 – LAND USE POLICIES – URBAN AREA SECTION 8.1 MIXED USE INTENSIFICATION AREAS SUBSECTION 8.1.1(4) UPTOWN URBAN CENTRE	Delete subsection 8.1.1(4.1) b) in its entirety and replace with a NEW subsection 8.1.1(4.1) b) General Objectives as follows: b) To establish Uptown as an Urban Centre composed of retail and service commercial, employment, residential and public service facility uses providing a focus for north-east Burlington. To maintain the existing supply of employment lands and expand opportunities for higher intensity office development on those lands, where permitted.					

8	<p>CHAPTER 8 – LAND USE POLICIES – URBAN AREA</p> <p>SECTION 8.1 MIXED USE INTENSIFICATION AREAS</p> <p>8.1.3(5) LOCAL CENTRE DESIGNATION</p> <p>8.1.3 (5.3) SITE-SPECIFIC POLICIES</p>	<p>Add New subsection 8.1.3 (5.3) d) as follows:</p> <p>d) The properties located at 2258 Mountainside Drive and 800 Burloak Drive <i>shall</i> be located within the Local Centre land use designation and subject to the policies of subsection 8.1.3 (5) of this Plan. Schedule C: Land Use: Urban Area <i>shall</i> be updated accordingly.</p>
9	<p>SECTION 8.2 EMPLOYMENT</p> <p>SUBSECTION 8.2.3 GENERAL EMPLOYMENT DESIGNATION</p> <p>SUBSECTION 8.2.3(3) SITE-SPECIFIC POLICIES</p>	<p>Change the policy number of subsection 8.2.3(3), Site-Specific Policies, to subsection 8.2.2 (5) as follows:</p> <p>8.2.32 (35) Site Specific Policies</p>
10	<p>SECTION 8.5 MINERAL RESOURCE EXTRACTION AREA</p>	<p>Delete subsection 8.5 a) in its entirety and replace with a NEW subsection 8.5 a) Mineral Resource Extraction Area as follows:</p>

		<p>a) 5235 Dundas Street: Notwithstanding the other policies of this Plan, the existing shale <i>quarry</i> operation located at 5235 Dundas Street <i>shall</i> be subject to the following:</p> <p>(i) the <i>City shall</i> consider the shale <i>quarry</i> operation as <i>an interim land use</i> and <i>encourage</i> its progressive <i>rehabilitation</i> for an appropriate after-use <u>subject to the policies of 8.2, Urban Employment</u>; and</p> <p>(ii) where <i>rehabilitation</i> is being undertaken by reforestation, the after use <i>shall</i> aim to re-establish a functioning <i>ecosystem</i> similar in condition to the natural <i>ecosystem</i> in the Region of Halton.</p>
11	<p>SECTION 8.8 SUB-AREA POLICIES</p> <p>SUBSECTION 8.8.1 TREMAINE DUNDAS COMMUNITY</p>	<p>Delete subsection 8.8.1 Preamble in its entirety and replace it with a NEW subsection 8.8.1 Preamble, as follows:</p> <p>The secondary plan includes a mix of land uses providing a range of opportunities for residential and <i>employment development</i>, in addition to parks and open space that maximize the <i>natural environment</i>. The <i>employment area</i> <u><i>Employment Area</i></u> provided along Tremaine Road and Dundas Street and will provide a range of opportunities including office, retail/commercial and light industrial uses <u>and associated office and retail uses, as permitted</u>, that encourage live work proximity.</p>
12	<p>TREMAINE-DUNDAS</p> <p>8.8.1(2) GENERAL POLICIES</p>	<p>Delete subsection 8.8.1(2) e) in its entirety and replace with a NEW subsection 8.8.1(2) e) as follows:</p>

		<p>e) In addition to the policies found in Chapter 6: Infrastructure, Transportation and Utilities the following additional policies <i>shall</i> apply.</p> <ul style="list-style-type: none"> (i) extensive, single-use surface parking lots are discouraged in areas designated Urban Corridor and Urban Corridor-Employment, located at the intersection of Dundas Street and Tremaine Road and bounded by the public road right-of-ways. Limited, short-term convenience parking is permitted in the Urban Corridor area to support the retail uses and is <i>encouraged</i> to be shared use parking where permitted. (ii) where surface parking lots are present in the area designated Business Corridor <u>Urban Employment</u>, <u>not including the area located at the intersection of Dundas Street and Tremaine Road and bounded by public road right-of-ways</u>, parking is <i>encouraged</i> to be located at the rear of buildings, away from street frontages in order to improve the quality of the public realm and minimize visual impact. (iii) in the area designated Urban Corridor-Employment, <u>located north of the intersection of Dundas Street and Tremaine Road and south of the first public road right-of-way</u>, parking is <i>encouraged</i> to be provided in the form of shared structured parking lots or underground parking garages. (iv) adequate vehicular and bicycle parking and storage facilities for residents, employees and visitors <i>shall</i> be provided in each of the land use areas to <i>encourage active transportation</i> and effective use of transit. Other transportation measures, such as electric vehicle charging stations, dedicated priority parking spaces for carpool, ride sharing and ultra low emission vehicles in parking areas of multistorey residential, Urban <u>Corridor</u> and Business Corridor <u>Urban Employment designations</u> <i>shall</i> be considered and incorporated into future <i>development</i> where feasible
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13	<p>TREMAINE-DUNDAS</p> <p>8.8.1(2) GENERAL POLICIES</p>	<p>Delete subsection 8.8.1(2) f) (v), (vi), (xviii) and (xix) and replace it with a NEW subsection 8.8.1(2) f) (v), (vi), (xviii) and (xix) as follows:</p> <p>(v) <i>Development</i> on lands designated Business Corridor and Urban Corridor-Employment <u>Urban Employment</u> is <i>encouraged</i> to incorporate <i>eco-Industrial Development</i> practices, through the incorporation of measures such as locally generated and shared energy sources, sharing waste heat, etc.</p> <p>(vi) <i>Development</i> on lands designated Business Corridor <u>located along Tremaine Road, north of Dundas Street and the first public right-of-way, and designated Urban Employment</u>, <i>should</i> promote the use of alternate modes of transportation: walking, cycling or transit and encourages transportation demand techniques such as electric vehicle charging stations, car-pooling, other forms of ridesharing with incentives such as dedicated priority parking spaces for carpool, ride sharing, and ultra low emission vehicles through a minimum percentage of total parking spaces.</p> <p>(xviii) Incorporation of solar energy in the Business Corridor and Urban Corridor—Employment <u>Urban Employment</u> designations is <i>encouraged</i> to be located on the roofs of buildings to reduce lot coverage and improve the public realm. Excess energy produced through solar panels <i>may</i> be transmitted throughout the community to prevent the waste of energy and the reliance on other non-renewable energy sources.</p> <p>(xix) <i>Developments</i> in the Business Corridor <u>on lands located along Tremaine Road, north of Dundas Street and the first public right-of-way and designated Urban Employment</u> are <i>encouraged</i> to incorporate visible green <i>infrastructure</i> technology into facades and signage, such as photovoltaic cells, recycled materials and green roofs.</p>
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14	<p>TREMAINE-DUNDAS</p> <p>8.8.1(3.2) URBAN CORRIDOR – EMPLOYMENT DESIGNATION</p>	<p>Delete subsections 8.8.1(3.2) in its entirety and replace with NEW subsection 8.8.1(3.2) as follows:</p> <p>8.8.1 (3.2) URBAN CORRIDOR – EMPLOYMENT DESIGNATION</p> <ul style="list-style-type: none"> a) In addition to uses permitted in 8.1.3 (8.2) b) prestige <i>industrial</i> and <i>office</i> uses are encouraged. Farmers market use is permitted. b) In addition to the policies in 8.1.3 (8.2) <i>development</i> in the Urban Corridor – Employment block along the west side of Tremaine Road <i>shall</i> achieve land use compatibility with future <i>employment</i> uses along the east side of Tremaine Road, as well as with residential uses located to the west. c) Notwithstanding policy 8.1.3 (8.2) h) <i>development</i> on lands designated Urban Corridor – Employment <i>shall</i> be a minimum of two storeys and a maximum of 6 stories although buildings located in close proximity to the intersection of Tremaine Road and Dundas Street <i>should</i> be a minimum of three storeys. Any increase in maximum height <i>shall</i> require a site specific Zoning By-law amendment and an air quality assessment to assess potential existing and future industrial and traffic impacts from the surrounding areas. d) In addition to the policies in 8.1.3 (8.2) outside storage <i>shall</i> not be permitted. e) In addition to the policies in 8.1.3 (8.2) loading, servicing and delivery functions <i>shall</i> be consolidated to the extent practical and <i>shall</i> generally be located to the rear of buildings and screened from public view. f) In addition to the policies in 8.1.3 (8.2) lands within the Urban Corridor – Employment designation <i>may</i> be used for stormwater management including <i>Low Impact Development</i> and naturalization with emphasis on creating more open green space between buildings. g) Policy 8.1.3 (8.2) m) does not apply. The addition of non-employment uses through a site specific Official Plan Amendment <i>shall</i> be prohibited.
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8.8.1 (3.2) URBAN EMPLOYMENT DESIGNATION

a) The following uses *may* be permitted on lands designated Urban Employment in the Tremaine-Dundas Community:

- a. manufacturing;
- b. research and development in connection to manufacturing;
- c. warehousing, including uses related to the movement of goods;
- d. office and retail associated with a use listed in subsections i. to iii above;
- e. facilities that are ancillary to the uses in subsections i. to iv above;
- f. any other prescribed business and economic uses;
- g. *institutional* and other uses not listed in subsections i. to v. above, including retail and office uses, provided they were lawfully established on or before October 20, 2024;

b) The following uses *shall* be prohibited within the Urban Employment designation:

- (i) residential uses
- (ii) commercial uses
- (iii) *public service facilities*
- (iv) institutional uses
- (v) retail and *office* uses not associated with the primary employment use;
- (vi) *sensitive land uses* that are not ancillary to uses permitted in the Urban Employment designation

c) *Development* along the west side of Tremaine Road *shall* achieve land use compatibility with future employment uses along the east side of Tremaine Road, as well as with residential, mixed uses and Natural Heritage System areas located to the west within the secondary plan area.

d) With the exception of the stormwater management ponds along Tremaine Road, *development* within the *Employment Area* *shall* create a continuous street frontage that complements the anticipated Town of

		<p><u>Oakville Tremaine Road frontage and helps address potential noise compatibility concerns with future <i>employment</i> uses in the Town of Oakville.</u></p> <p>e) <u><i>Development</i> along Tremaine Road shall be a minimum of two storeys in height (or the equivalent height) to provide screening and buffering for residential <i>development</i> to the west.</u></p> <p>f) <u><i>Development</i> that abuts residential areas will include adequate landscaping, fencing, noise abatement or other measures to achieve compatibility between uses.</u></p> <p>g) <u>Loading, servicing and delivery functions shall be consolidated to the extent practical and shall generally be located to the rear of buildings and screened from public view.</u></p> <p>h) <u>Outside storage may be permitted provided adequate screening and buffering is established.</u></p> <p>i) <u>Lands within the <i>Urban Employment</i> designation may be used for stormwater management, including <i>Low Impact Development</i> features and naturalization, and for <i>enhancements</i> to key natural features as part of the natural heritage system.</u></p> <p>j) <u>The <i>Employment Area</i> shall have a minimum of 70 - 90 m in depth (dependant on adjacent land use) to provide sufficient buffering between residential uses within the Tremaine Dundas Community and future potential industrial uses located within the Town of Oakville.</u></p> <p>k) <u>For <i>Employment Area</i> lands along Tremaine Road, between Dundas Street and the first street right-of-way to the north of Dundas Street, in Phase 1 of the Tremaine-Dundas Community Secondary Plan, the following policies shall apply:</u></p> <p>(i) <u><i>development</i> on lands designated Urban Employment shall be a minimum of two storeys and a maximum of 6 stories although buildings located in close proximity to the intersection of Tremaine Road and Dundas Street should be a minimum of three storeys. Any increase in maximum height shall require a site specific Zoning By-law amendment and an air quality</u></p>
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		<p><u>assessment to assess potential existing and future industrial and traffic impacts from the surrounding areas.</u></p> <p>(ii) <u>notwithstanding policy 8.8.1(3.2) h) outside storage shall not be permitted.</u></p> <p>(iii) <u>lands within the Urban Employment designation may be used for stormwater management including <i>Low Impact Development</i> and naturalization with emphasis on creating more open green space between buildings.</u></p>
15	<p>TREMAINE-DUNDAS</p> <p>8.8.1(3.3) BUSINESS CORRIDOR DESIGNATION</p>	<p>Delete subsections 8.8.1(3.3) in its entirety</p> <p>8.8.1(3.3) BUSINESS CORRIDOR DESIGNATION</p> <p>a) Notwithstanding policy 8.2.4(2) (a)(i) hotel, conference and/or convention uses shall not be permitted.</p> <p>b) In addition to the polices in 8.2.4(2) development along the west side of Tremaine Road shall achieve land use compatibility with future employment uses along the east side of Tremaine Road, as well as with residential, mixed uses and natural heritage system areas located to the west within the secondary plan area.</p> <p>c) In addition to the polices in 8.2.4(2) the Business Corridor shall have a minimum of 70 – 90 m in depth (dependant on adjacent land use) to provide sufficient buffering between residential uses within the Tremaine Dundas Community and future potential industrial uses located within the Town of Oakville.</p> <p>d) In addition to the polices in 8.2.4(2), with the exception of the stormwater management ponds along Tremaine Road, development within the Business Corridor shall create a continuous street frontage that complements the anticipated Town of Oakville Tremaine Road frontage and helps address potential noise compatibility concerns with future employment uses in the Town of Oakville.</p> <p>e) Notwithstanding policy 8.2.4 (2) b) development along Tremaine Road shall be a minimum of two storeys in height (or the equivalent height) to</p>

		<p>provide screening and buffering for residential development to the west.</p> <p>f) In addition to the polices in 8.2.4(2) development that abuts residential areas will include adequate landscaping, fencing, noise abatement or other measures to achieve compatibility between uses.</p> <p>g) In addition to the polices in 8.2.4(2) loading, servicing and delivery functions shall be consolidated to the extent practical, be generally located at the rear/side of buildings and be screened from public view.</p> <p>h) In addition to the polices in 8.2.4(2) lands within the Business Corridor designation may be used for stormwater management, including Low Impact Development features and naturalization, and for enhancements to key natural features as part of the natural heritage system.</p> <p>i) In addition to the polices in 8.2.4(2) outside storage may be permitted provided adequate screening and buffering is established.</p>
16	<p>TREMAINE-DUNDAS</p> <p>8.8.1(4) IMPLEMENTATION POLICIES</p>	<p>Delete subsection 8.8.1(4) a) (i) a. and h. and replace with NEW subsection 8.8.1(4) a) (i) a. and h. as follows:</p> <p>a. Phase 1 will generally comprise the lands to the south and east of the Central Woodland, including the lands designated as Residential – Medium Density, Urban Corridor, Urban Corridor – <u>Employment and Business Corridor and Urban Employment</u>. Phase 4-2 shall include a maximum of 400 residential dwelling units.</p> <p>h. The <i>development</i> of employment areas within the Tremain Dundas Secondary Plan will be <i>encouraged</i> to occur concurrently with the <i>development</i> of nearby residential lands. If residential uses within 70 metres of an <i>employment</i> designation are developed prior to the <i>employment</i> uses within the Urban Employment blocks, <u>excluding lands along Tremain Road between Dundas Street and the first street right-of-way to the north of Dundas Street</u>, appropriate interim noise mitigation measures and buffering <i>shall</i> be implemented to ensure compatibility with potential <i>employment</i> uses on the Town of Oakville lands in</p>

		accordance with the recommendations of a Land Use Compatibility Assessment and Detailed Noise Study.
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OFFICIAL PLAN AMENDMENT

PROPOSED AMENDMENT NO. 1 TO BURLINGTON'S REGIONAL OFFICIAL PLAN

CONSTITUTIONAL STATEMENT

The Amendment contained in Part “B” of this document constitutes Amendment No. XX to the Regional Official Plan of the City of Burlington, 1995, as amended.

PART A – PREAMBLE

1. PURPOSE OF THE AMENDMENT

The purpose of this Official Plan Amendment is to update policy text of *Burlington's Regional Official Plan (BROP), 1995, as amended* related to the City's Employment Area, to align with recent changes to Provincial policy.

The effect of the proposed Amendment is to:

Modify the text of Burlington's Regional Official Plan, 1995, as amended, to address provincial legislation changes that changed the definition of “area of employment” in the Planning Act and the new Provincial Planning Statement, 2024 among other things.

SITE AND LOCATION

The proposed amendment applies to the Employment Area within the City of Burlington subject to the Burlington Regional Official Plan, 1995, as amended.

2. BASIS FOR THE AMENDMENT

Transition of Planning Responsibilities

Legislative changes made through Ontario's Bill 23, *More Homes Built Faster Act, 2022* and Bill 185, *Cutting Red Tape to Build More Homes Act, 2024*, has transitioned planning responsibilities from upper-tier municipalities to local municipalities. On July 1, 2024, through changes to the Planning Act, the Province identified the Region of Halton as an “upper-tier municipality without planning responsibilities”. As a result, the Regional Official Plan is no longer an official plan for the Regional Municipality of Halton. Instead, it has been deemed an official plan of each of the lower-tier municipalities in Halton (City of Burlington, Town of Halton Hills, Town of Milton, and Town of Oakville), until it is revoked or

amended by the respective municipality. *Halton Regional Official Plan, 1995* (ROP, 1995) policies are in-force and effect, and cannot be appealed. From this point forward the *Halton Regional Official Plan, 1995* will be referred to as the “Burlington Regional Official Plan, 1995” or “BROP, 1995”.

OPA 1 will move toward the harmonization of the two plans of the city, BOP, 2020 and BROP, 1995, by repealing a number of policies within subsection 83 “Employment Areas” of the Burlington Regional Official Plan, 1995, as amended.

Changes to Provincial Policy Framework – Employment Area

Legislative changes made through Bill 97, *Helping Homeowners, Protecting Tenants Act, 2023*, have amended the definition in the *Planning Act* for “area of employment”, narrowing the permitted uses within the Employment Area to primarily manufacturing (including related research and development), warehousing and goods movement uses, retail and office uses directly associated with the primary use, ancillary facilities and any other prescribed business and economic uses. Commercial uses not associated with the primary use, including office and retail, are now prohibited within the Employment Area.

Policy changes in the new Provincial Planning Statement (PPS), 2024, continue to prohibit residential uses in the Employment Area. Further it now prohibits institutional uses and public service facilities in Employment Areas, such as schools, child care, hospitals and long term care services, recreation, and police and fire protection. A transition provision authorizes the continuation of uses that were lawfully established within the Employment Area as of October 20, 2024. Updated policy eliminates the municipal comprehensive review process for employment land conversion, and updates policy for removal of land from the employment area.

These changes have necessitated amendments to the Employment Area policies of the Burlington Regional Official Plan 1995, to ensure consistency with/conformity to the updated policy framework. The policies in this amendment are consistent with or in conformity to the in effect Provincial plans and policies at the time of approval, though they may be subject to change as the Ontario planning policy and regulatory landscape continues to evolve.

The Statutory Public Meeting about the Official Plan Amendment will be held on January 13, 2026, including presentation of a final recommendation report. Comments received during the Statutory Public Meeting will be considered and any resulting changes to the ROPA 1 policies will be presented to Council on March 4, 2026.

PART B – THE AMENDMENT

1. DETAILS OF THE AMENDMENT

1.1 Text Change:

The amendment includes the changes to the text of the Burlington Regional Official Plan, 1995 (a Plan of the City of Burlington) as described in the following table:

Item No.	Chapter/Section	Description of Change
1	Employment Areas 83.2	Delete sections 83.2 (1) and (1.1) in its entirety and replace with a new section as follows: (1) [Section number not in use.]
2	Employment Areas 83.2	Delete section 83.2 (4) in its entirety and replace with a new section as follows: (4) [Section number not in use.]
3	Employment Areas 83.2	Delete section 83.2 (6), (7) and (8) in its entirety.

Appendix E: Burlington Draft Regional Official Plan Amendment No. 1, Tracked Changes

The below table provides a tracked changes version of the draft proposed Burlington Regional Official Plan Amendment No. 1.

In the “Description of Change” column, text that is underlined is new text to be inserted into the Burlington Official Plan, 2020 by way of changes to the in-effect policies. Text that is crossed out (“~~strike through~~”) is to be deleted from the Plan.

Item No.	Chapter/Section	Description of Change
1	Employment Areas 83.2	<p>Delete sections 83.2 (1) and (1.1) in its entirety and replace with a new section as follows:</p> <p>It is the policy of the Region to:</p> <p>(1) Plan for Employment Areas by:</p> <ul style="list-style-type: none"> a) Prohibiting residential uses; b) Prohibiting major retail uses; c) Permitting a range of employment uses including but not limited to industrial, manufacturing, warehousing, and office uses; d) permitting a range of ancillary uses that are associated with an employment use or supportive of the overall Employment Area, as identified in Local Official Plans in accordance with Section 83.2(6)b) of this Plan; e) limiting sensitive land uses, including institutional uses, by only permitting such uses where they: <ul style="list-style-type: none"> (i) are an ancillary use that is associated with an employment use or that is supportive of the overall Employment Area; (ii) are located at the periphery of the Employment Area and/or identified within an appropriate Local Official Plan designation; (iii) address compatibility considerations in accordance with Section 143(12) of this Plan; (iv) support achieving the employment forecast in Table 1 and the density target

		<p>for <i>Employment Areas</i> in Table 2 of this Plan; and;</p> <p>(v) do not contain a residential component or function where individuals reside on a temporary or permanent basis, such as long-term care facilities, retirement homes, or boarding schools;</p> <p>f) —recognizing <i>existing uses</i>;</p> <p>(1.1) —notwithstanding Section 83.2(1)b) of this Plan, to recognize <i>major retail uses</i> as permitted by specific policies of a Local Official Plan on December 16, 2009.</p> <p>(1) [Section number not in use.]</p>
2	Employment Areas 83.2	<p>Delete section 83.2 (4) in its entirety and replace with a new section as follows:</p> <p>(4) Prohibit the conversion of lands within the <i>Employment Areas</i> to non-employment uses including <i>major retail uses</i> unless through a <i>municipal comprehensive review</i> where it has been demonstrated that:</p> <p>a) —there is a need for the conversion;</p> <p>b) —the conversion will not compromise the <i>Region's</i> Local Municipality's ability to meet the employment forecast in Table 1 and Table 2a;</p> <p>c) —the conversion will not adversely affect the overall viability of the <i>Employment Area</i>, and achievement of the <i>intensification</i> and density targets of Table 2 and other <i>policies</i> of this Plan;</p> <p>d) —there are existing or planned <i>infrastructure</i> and <i>public service facilities</i> to accommodate the proposed conversion;</p> <p>e) —the lands are not required for employment purposes over the long term;</p> <p>f) —cross-jurisdictional issues have been considered; and all <i>Regional policies</i> and requirements, financial or otherwise, have been met.</p> <p>(4) [Section number not in use.]</p>
3	Employment Areas 83.2	<p>Delete sections 83.2 (6), (7) and (8) in its entirety:</p> <p>(6) Require Local Municipalities to plan for <i>Employment Areas</i> by:</p> <p>a) —delineating and protecting the <i>Employment Areas</i> as identified on Map 111 of this Plan;</p> <p>b) —developing policies and land use designations for lands within the <i>Employment Areas</i> that:</p>

		<p>i.—support accommodating forecast employment growth as identified in Table 1 and achieving the <i>Employment Area</i> density targets identified in Table 2 of this Plan;</p> <p>ii.—identify a range of employment uses, <i>ancillary uses</i>, and <i>sensitive land uses</i>, as appropriate for the planned function of the specific land use designations and their role within the Regional Urban Structure and <i>Local Urban Structures</i>;</p> <p>iii.—require land use compatibility studies for <i>sensitive land uses</i> in accordance with Section 143(12) of this Plan; and</p> <p>iv.—ensure an appropriate interface is provided between the <i>Employment Areas</i> and adjacent non-employment areas and between specific employment designations in the Local Official Plan to maintain land use compatibility.</p> <p>c)—Promoting <i>intensification</i> and increased densities in both new and existing <i>Employment Areas</i> by facilitating compact, transit-supportive built form; development of <i>active transportation</i> networks; and minimizing surface parking.</p> <p>(7) Where <i>Employment Areas</i> are located within a <i>Major Transit Station Area</i> as delineated on Map 111, recognize the dual role and function of these <i>Major Transit Station Areas</i> as mixed use <i>Strategic Growth Areas</i> as well as the location of existing employment uses, and , require the Local Municipalities, when planning for these areas through a <i>Area-Specific Plan</i> in accordance with Section 81.2(4) of this Plan to:</p> <p>a)—recognize the importance of the protection of existing employment uses and the potential for appropriate employment growth and <i>intensification</i> within the <i>Employment Area</i> and within adjacent non-employment areas;</p> <p>b)—provide an appropriate interface between the <i>Employment Area</i> and adjacent non-employment areas to maintain land use compatibility; and</p> <p>c)—only permit <i>sensitive land uses</i> within adjacent non-employment areas if land use compatibility can be addressed in a manner that protects existing employment uses in accordance with Sections 79.3(12) and 143(12) of this Plan.</p> <p>(8) Subject to Section 77(7), designate lands where appropriate in the vicinity of existing or planned <i>major</i></p>
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		highway interchanges, ports, rail yards and airports for employment purposes that rely on this infrastructure, once these lands are included in the Urban Area.
--	--	--



 **Watson
& Associates**
ECONOMISTS LTD.

Growth Analysis Review

City of Burlington

Final Report

February 14, 2025

Watson & Associates Economists Ltd.
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In association with:



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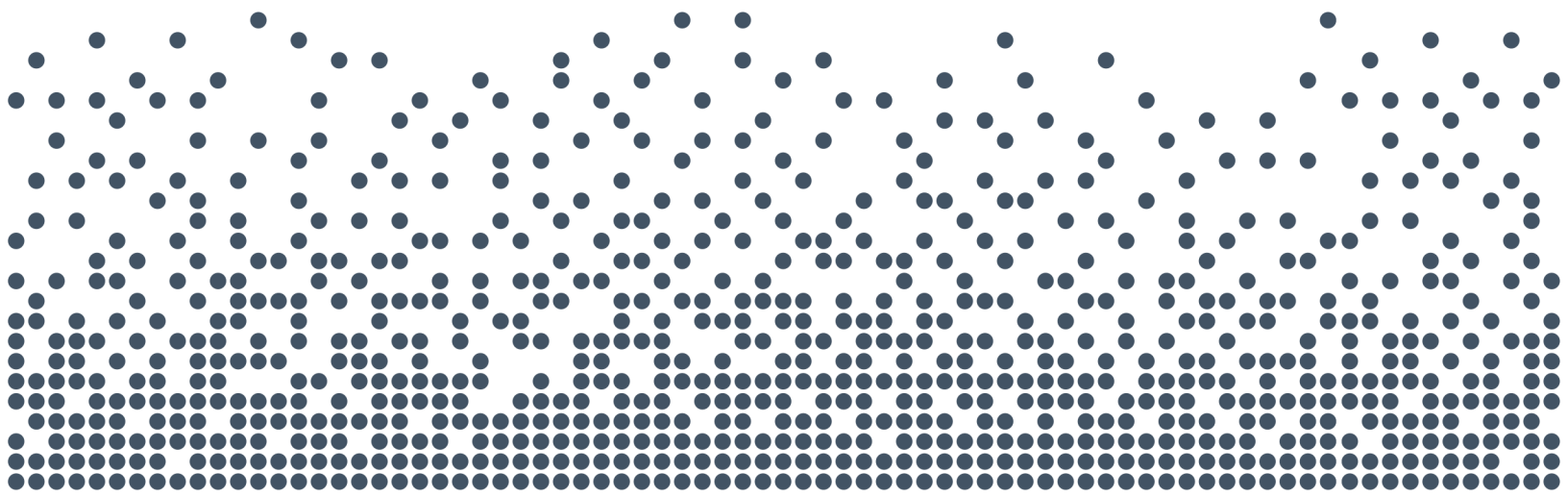
List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
A.R.U.	Additional residential unit
B.O.P.	Burlington Official Plan
B.P.E.	Best Planning Estimates
B.U.A.	Built-up area
C.M.A.	Census Metropolitan Area
CMHC	Canada Mortgage and Housing Corporation
COVID-19	Coronavirus disease
D.C.	Development charges
D.G.A.	Designated greenfield area
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.T.A.	Greater Toronto Area
G.T.H.A.	Greater Toronto and Hamilton Area
I.G.M.S.	Integrated Growth Management Strategy
I.M.F.	International Monetary Fund
J.B.P.E.	Joint Best Planning Estimates
M.M.A.H.	Ministry of Municipal Affairs and Housing



List of Acronyms and Abbreviations (Cont'd)

M.O.F.	Ministry of Finance
M.T.S.A.	Major Transit Station Area
N.F.P.O.W.	No fixed place of work
N.P.R.	Non-permanent residents
O.P.	Official Plan
O.P.A.	Official Plan Amendment
P.P.S., 2020	Provincial Policy Statement, 2020
P.P.S., 2024	Provincial Planning Statement, 2024
P.P.U.	Persons per unit
Q.E.W.	Queen Elizabeth Way
R.O.P.	Regional Official Plan
R.O.P.A.	Regional Official Plan Amendment
S.G.A.	Strategic Growth Area
S.P.A.	Special Planning Area
U.S.	United States



Executive Summary



Executive Summary

In 2024, the City of Burlington retained Watson & Associates Economists Ltd. (Watson), in association with Dillon Consulting Limited (Dillon), to undertake a Growth Analysis Review to comprehensively assess the City's long-term population, housing, and employment growth outlook to the year 2051. This review will form a foundational document to the City of Burlington Official Plan (B.O.P.), Strategic Plan and other relevant documents by providing key direction with respect to the following:

- Long-term population, housing, and employment growth scenarios for the City, including a recommended scenario with additional details on growth allocations and phasing by Planning Policy Area, including Strategic Growth Areas, Existing Community Areas, New Community Areas, and Rural Areas;
- A residential intensification analysis;
- An updated housing market needs assessment;
- An Employment Area land needs analysis; and
- Planning policy recommendations related to long-term growth management and monitoring.

This work is designed to guide a variety of active City projects and studies and will be used as a key input in advancing the City's objectives. It also provides the best information currently available at the time. It is noted that this Growth Analysis Review is to be used to guide the amount, type, timing, and location of long-term population, housing, and employment growth for the City and to provide planning policy recommendations related to long-term growth management and monitoring. It is not to be used to constrain or set a capacity limit on urban development.

In 2019, Dillon and Watson prepared a Growth Analysis study as input to the City's B.O.P. review process and the Halton Region Integrated Growth Management Strategy. Since the release of the previous Growth Analysis, several key factors have contributed to the need to review the long-term population, employment, and household forecast for the City of Burlington, including:

- Numerous broad changes to provincial planning policy and municipal governance, which are anticipated to have a direct impact on long-term growth management for the City of Burlington; these key provincial planning policy



changes are explored in greater detail in this report (refer to Chapter 2 for additional details);

- Updates to Canadian federal immigration targets for permanent and non-permanent residents;
- Several updates (provided annually) to long-range population growth forecasts prepared by the Ministry of Finance, including updated population forecasts for Halton Region;
- Evolving regional economic and real estate market trends across the Greater Toronto and Hamilton Area (G.T.H.A.), Halton Region, and the City of Burlington;
- Halton's Regional Official Plan Amendment 48 (R.O.P.A. 48) and Halton's Regional Official Plan Amendment 49 (R.O.P.A. 49), approved and modified by the Ministry of Municipal Affairs and Housing, which has introduced 347 hectares of new Community Area lands in Burlington that had not been previously considered by the 2019 Growth Analysis Study, nor by the B.O.P., 2020 or Halton Region's Official Plan; and
- The release of the Halton Region Joint Best Planning Estimates (J.B.P.E.) population, housing, and employment update in the fall of 2023. The primary purpose of the J.B.P.E. for Halton Region was to serve as the basis for the Region's infrastructure master planning work that is currently underway. The J.B.P.E. anticipates considerably stronger population growth over the next 10 years across each of Halton Region's Area Municipalities, consistent with the municipal housing pledges required through Bill 23 (refer to Chapter 2).

In accordance with the above, there is a need to re-examine the City of Burlington's near-term and longer-term population, housing, and employment growth forecasts, growth allocations, and growth management policies within the context of current provincial planning, regional growth trends, and local drivers of growth across the City.

Provided below is a summary of the key findings of this Growth Analysis Review.

Macro-Economic Trends Influencing Economic Growth Trends and Planning for Employment Areas in the G.T.H.A.

The strength of the City of Burlington's economy is strongly correlated to the competitiveness of the broader G.T.H.A. regional economy. A range of macro-economic and demographic factors are anticipated to influence future population and employment growth by sector across the G.T.H.A. and more specifically within the City



of Burlington. These factors are anticipated to influence future growth trends on residential and non-residential lands within Burlington and the broader regional market area over the coming decades.

To begin, advancements in technology and telecommunications infrastructure as well as the rise of artificial intelligence are having significant impacts on the nature of economic growth and labour force trends both globally and locally. Technological innovation, which was accelerated during the coronavirus disease (COVID-19) pandemic, has increased opportunities related to work at home and hybrid work at home/at office models and distributed work/learning. In addition, the continued rise of the gig economy^[1] has individuals using technology to supplement their income in more flexible ways. Lastly, the increasing use of technology in commercial services is also leading to alternative platforms to purchase and share products.

The nature of traditional industrial processes is also rapidly shifting, becoming more automated and capital/technology intensive with lower labour requirements. As a result of these changes, emerging advanced manufacturing and clean technology sectors often have siting, 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. Anticipating and responding to the evolving needs of industry will be necessary for the City to better position itself for sustained growth, particularly in faster growing emerging industrial sectors.

Burlington’s industrial employment base is largely concentrated in transportation and warehousing, wholesale trade, and manufacturing. These employment sectors have experienced various levels of labour force growth over the past several years and generally represent established economic clusters within the regional economy. In contrast, certain employment sectors, including finance and insurance, professional, scientific and technical services, and health care and social assistance are less concentrated but have recently been experiencing moderate to strong labour force growth. These employment sectors generally represent emerging economic clusters within the City.

^[1] The gig economy refers to a general workforce environment, which includes short-term employment, contractual jobs, and independent contractors such as Uber drivers, social media platforms, or crowdfunding.



Fundamental to the long-term planning and economic development objectives of the B.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 as well as other mixed-use commercial areas. Generally, Employment Areas should offer proximity to Goods Movement infrastructure along transportation corridors. Other attributes, such as access to higher-order transit, proximity to employment-supportive uses, and connectivity to Community Areas, are also critical for certain Employment Areas, particularly those that focus on knowledge and innovation.

City of Burlington Population Profile and Housing Growth Trends

Burlington's population has experienced moderate growth over the past two decades. Between 2001 and 2021, the City grew at an annual average growth rate of 1.1%, or approximately 1,900 people per year. During this same time period, Halton Region grew at a considerably faster annual average rate of 2.3%.

Demographic trends strongly influence both housing need and form. Compared to the Province and Halton Region, the average age of the population base in Burlington is relatively older. As of 2021, approximately 52% of the City's population was under 44 years of age, compared to 56% in Halton Region. Over the past 20 years the City of Burlington has experienced a significant increase in the share of seniors (population aged 65+) increasing from 14% to 20% of the population between 2001 and 2021. Over the next 30 years, the City's share of population in the 65+ age group is forecast to increase at over double the rate of the City-wide population, primarily driven by the aging of the City's existing Baby Boomer population.^[2] This is important to recognize as it has implications regarding housing demand by structure type and tenure as well as municipal service needs.

Over the past two decades, the City of Burlington has averaged just under 800 new housing units per year. The highest annual growth rates for low- and medium-density housing were observed during the 2006 to 2011 and 2001 to 2006 Census periods, respectively. Since then, the rate of low- and medium-density housing development has steadily decreased. In contrast, the rate high-density housing construction has increased within the City of Burlington over the past 15 years. Steady demand for higher-density forms is expected to increase over the medium to longer-term forecast

^[2] Baby Boomers are defined as those born between 1946 and 1964.



due to eroding housing affordability, combined with increasing needs from a growing population of young adults and seniors.

Planning for a Broader Supply of New Housing Options

Over the past two decades, the G.T.H.A. has captured a large share of the population growth in Ontario. Recent trends between 2016 and 2024, however, suggest that while the G.T.H.A. is expected to continue to experience steady population growth, the share of the provincial population increase is anticipated to continue to shift outward into the Greater Golden Horseshoe (G.G.H.) Outer Ring and the remaining areas of Southern Ontario. Notwithstanding this continued outward growth pressure from the G.T.H.A. to the remaining regions of Southern Ontario, steady population growth and housing demand is anticipated within the City of Burlington over the next three decades.

Within the G.T.H.A., the erosion of housing affordability places a greater emphasis for a broader range of ownership and rental housing options to accommodate the diverse needs of the population across all income levels and demographic groups. In Halton Region, only 41% of new low-density units absorbed since 2020 were priced under \$1 million. Comparably, average prices for new detached homes in York Region and the City of Toronto were even higher, but lower on average for all other upper-tier/single-tier G.T.H.A. municipalities. As of 2023, the average price of a new single detached home in Burlington was just under \$2 million, which is significantly higher than Halton Region's average price of \$1.6 million.^[3] Across Halton Region, and more broadly throughout the Province and the nation, household income levels have not kept pace with housing carrying costs for ownership and rental housing over the past two decades.

City of Burlington Growth Outlook to 2051

A broad range of considerations related to demographics, economics, and socio-economics are anticipated to impact future population and employment growth trends throughout Burlington over the 2021 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the form, density, and location of residential and non-residential development.

^[3] CMHC Housing Information Portal Absorbed Unit Prices. Sample size for 2023 for Burlington is 97 units.



Figure ES-1 presents the long-term population forecast for the City of Burlington to the year 2051. For comparative purposes, the approved R.O.P. population forecast for the City of Burlington and the Halton Region J.B.P.E. for the City of Burlington are also provided.^[4] Please refer to Appendix F for additional details regarding the population and housing forecast for the City of Burlington.

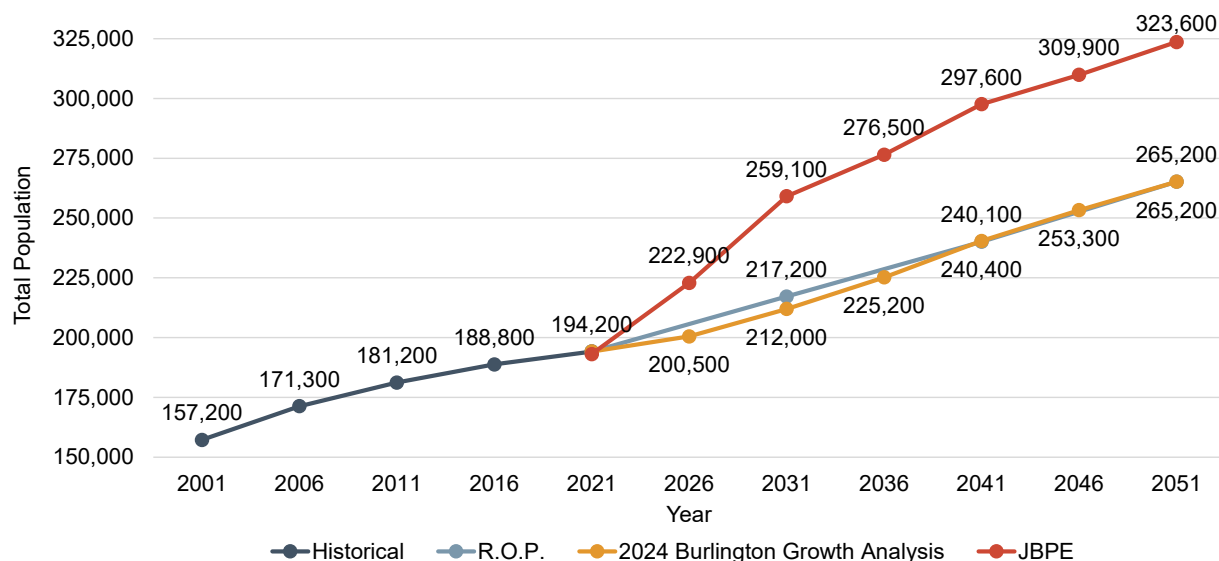
Key observations are as follows:

- The City of Burlington's population grew at an annual rate of 1.1% per year between 2001 and 2021, which is approximately 1,900 people per year.
- Under the R.O.P. forecast, the City is expected to reach 265,200 residents, which represents an annual rate of 1.0%. Comparatively, this represents a growth rate that is generally consistent with what the City has achieved historically.
- In accordance with the Halton Region J.B.P.E. forecast, the City is expected to reach a 2051 population of 323,600, which represents an annual rate of 1.7%. As noted in section 7.2 of this report, the City is not tracking closely to the Halton Region J.B.P.E. forecast for Burlington.

^[4] Halton Region Joint Best Planning Estimates data provided by the City of Burlington.



Figure ES-1
City of Burlington
Total Population, 2001 to 2051



Notes: Population includes net Census undercount and has been rounded. J.B.P.E. means Joint Best Planning Estimates; R.O.P. means Regional Official Plan.

Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; forecast by Watson & Associates Economists Ltd. Of the three long-term population growth scenarios prepared for the City, the 2024 Growth Analysis Review forecast, as prepared herein, is the recommended growth forecast scenario for the City of Burlington for the following reasons:

1. It represents a reasonable future rate of population growth relative to historical trends, considering recent and forecast immigration levels expected for Canada and Ontario over the next several years and longer-term population growth forecasts for the Province. Furthermore, the share of net migration and population growth in the 15 to 64 age group is reasonable within the context of historical migration patterns and broader demographic trends anticipated across the Province and the G.T.H.A.
2. Population growth in the City will continue to be largely driven by net migration (immigration) of working-age adults. Forecast trends in net migration are ambitious but reasonable for the purposes of long-range planning within the



context of federal immigration targets and anticipated population growth rates across Halton Region and the surrounding area.

3. The forecast level of annual new housing development required to accommodate the recommended population growth forecast for the City represents an achievable increase in housing activity relative to historical trends experienced over the past two decades, when considering the forecast population growth outlook and corresponding housing needs across Halton Region and, more broadly, throughout the G.T.H.A.

In accordance with recent development trends and longer-term growth drivers for the City within the broader regional context noted above, the population scenario under the Halton R.O.P. is considered reasonable for the purpose of long-range planning. Comparatively, the long-term population growth forecast for the City of Burlington prepared under the 2023 Halton Region J.B.P.E. forecast appears aggressive, particularly when considering the annual level of high-density housing growth required to achieve both the near- and long-term population forecast. Further discussion regarding the City's housing forecast by structure type is provided in subsection 7.5.2.

To accommodate the long-term population growth scenario, the City will require approximately 35,400 additional households over the 2021 to 2051 planning horizon. Figure ES-2 provides a summary of the City's anticipated housing needs in five-year increments from 2021 to 2051.

Figure ES-2 summarizes Burlington's recommended housing forecast by structure type (i.e., low density, medium density, high density, and secondary suites) over the 2021 to 2051 forecast period in five-year growth increments. Key observations are as follows:

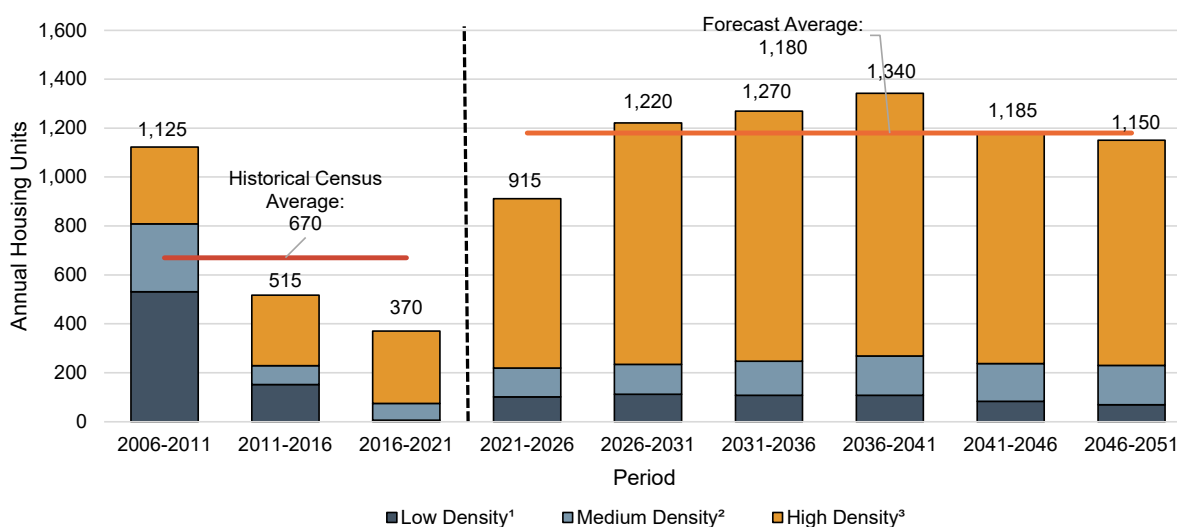
- The 2024 Growth Analysis Review forecast represents an increase of approximately 35,400 households or just under 1,200 units per year over the 30-year forecast period, which is close to double the amount of annual housing development achieved over the past 20 years (2001 to 2021).
- When considering recent building permit activity and active development applications, the share of high-density residential development is expected to grow over the longer term as opportunities for grade-related housing steadily diminish.
- Over the 30-year forecast period, most of the new residential development in the City is anticipated to be in the form of high-density housing. This shift in dwelling



type preferences towards high-density housing is anticipated to be driven largely by demographics (i.e., aging of the population), continued upward pressure on local housing prices, and the relatively limited availability of remaining vacant greenfield land to accommodate grade-related development.

- Over the 2021 to 2051 forecast period, new housing is expected to comprise 8% low-density units (singles and semi-detached), 12% medium-density units (multiples), and 80% high-density units (stacked townhomes, low-, mid- and high-rise apartments and secondary units).
- Over the next 30 years, the City is forecast to grow by 940 high-density housing units per year. This is more than twice the annual high-density housing growth when compared to historical trends achieved over the past 15 years.

Figure ES-2
City of Burlington
Housing Forecast by Structure Type, 2001 to 2051



[1] Low Density includes singles and semi-detached houses.

[2] Medium Density includes townhouses and apartments in duplexes.

[3] High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures have been rounded and may not add up precisely.

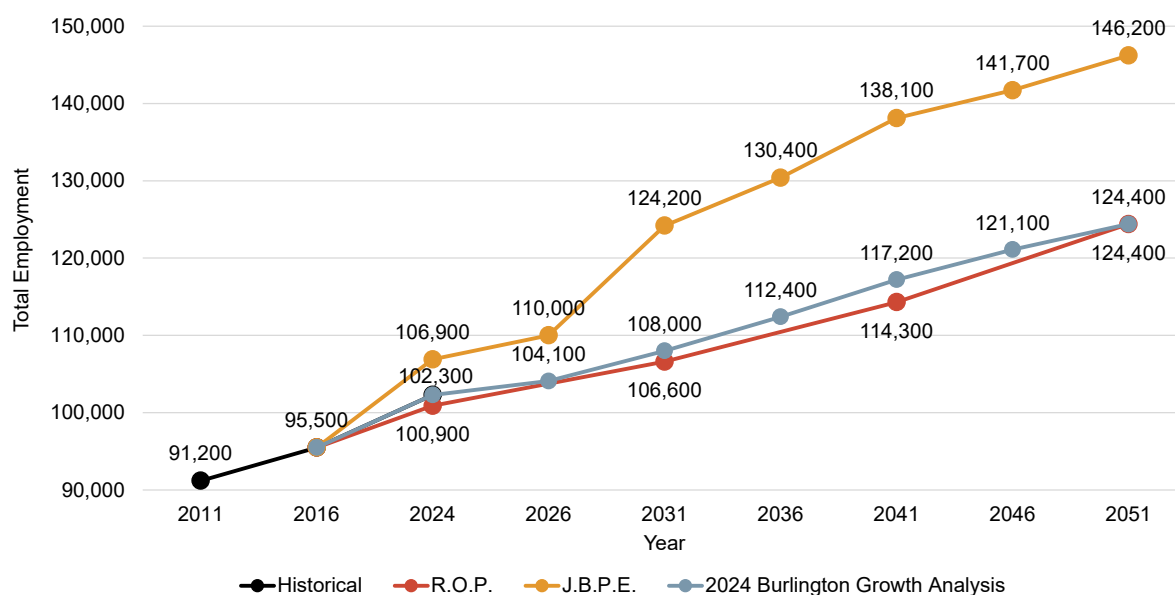
Source: Historical data derived from Statistics Canada Census profiles; forecast prepared by Watson & Associates Economists Ltd.

Figure ES-1-1 summarizes three long-term employment forecast scenarios for the City of Burlington over the 2021 to 2051 forecast period, relative to historical employment trends between 2001 and 2021. By 2051, Burlington's employment base is forecast to



reach approximately 124,000 jobs. This represents an increase of approximately 22,000 jobs between 2024 and 2051.

Figure ES-1-1
City of Burlington
Total Employment, 2001 to 2051



Note: Figures have been rounded. Total employment figures include work at home and no fixed place of work.

Source: J.B.P.E. forecast derived from Halton Region's J.B.P.E. for the City of Burlington. R.O.P. forecast derived from Region of Halton – Regional Official Plan Amendment 49 – Table 1, presented by Watson & Associates Economists Ltd.

Population and Employment Growth Allocations by Development Area, 2021 to 2051

Figure ES-4 provides a map of the City's growth allocation areas (as modified from the City's Growth Management Framework – Official Plan Schedule B-1). Figure ES-5 summarizes the City's population allocations by Planning Policy Area. Additional details are provided in Appendix H. Key assumptions are as follows:

- Over the 2021 to 2051 planning horizon, the City's built-up area (B.U.A.) is forecast to accommodate just under 70% of the City-wide population growth, with 43,900 people planned within this area.



- Within the B.U.A., the City's Primary Growth Areas are expected to accommodate 67% of forecast residential intensification.
 - The City's Secondary Growth Areas are expected to accommodate 24% of growth inside the B.U.A.
- New communities in the designated growth areas are forecast to accommodate 35% of the City-wide population growth, representing an additional 23,800 people.^[5]
- Rural Areas are expected to account for less than 1% of the City-wide population growth.

^[5] New Communities refers to Bridgeview, Eagle Heights, 1200 King, Tremaine-Dundas, and Bronte Creek Meadows.



Figure ES-4
City of Burlington Growth Framework
(as Derived from City of Burlington Official Plan Schedule B-1)

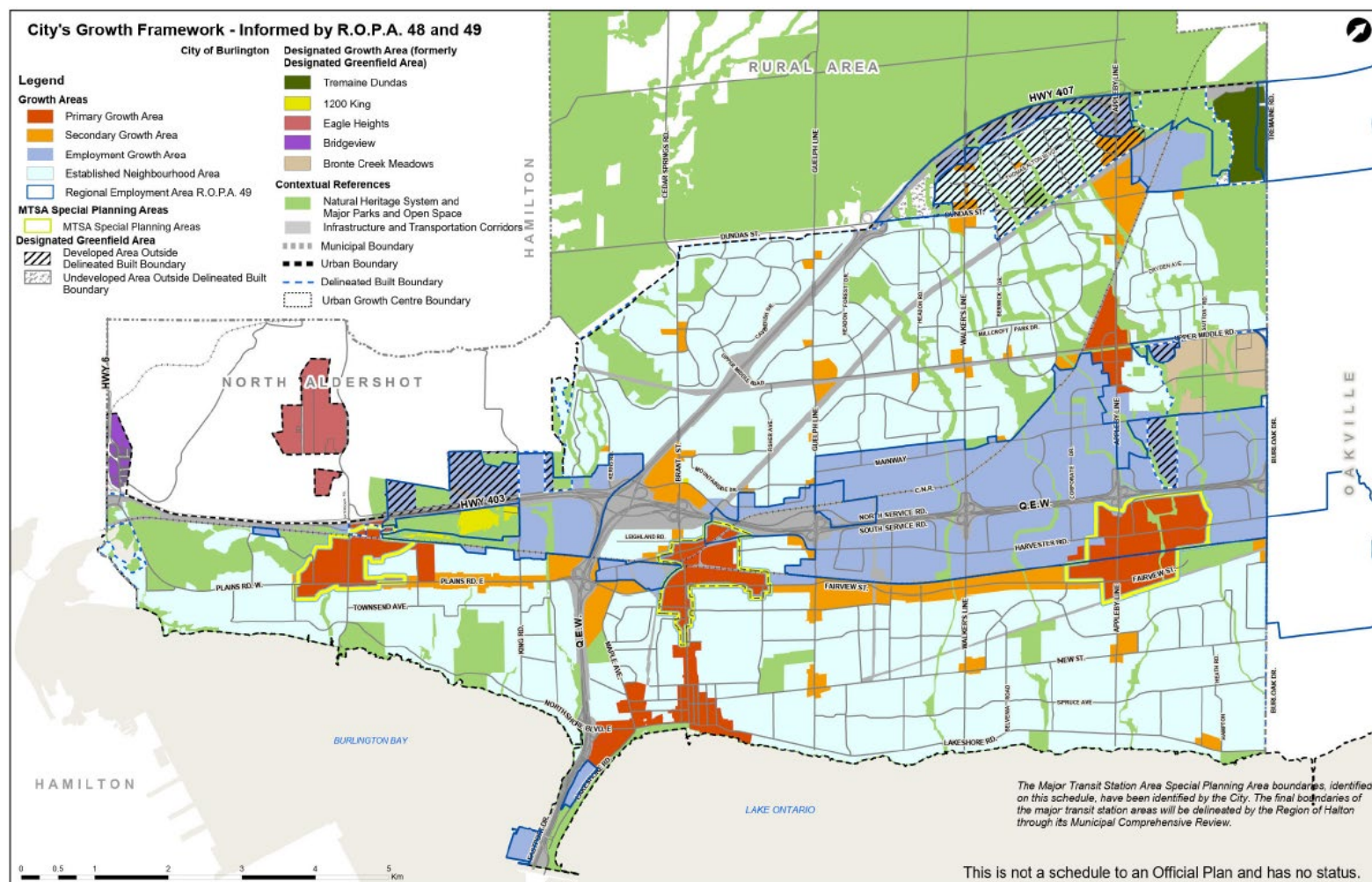




Figure ES-5
City of Burlington
Population Growth Allocation by Policy Area, 2021 to 2051

Policy Area	Growth Area	Population Growth ^[1]	Percentage Share of Population
Built-Up Area	Primary Growth Area Downtown Core Uptown Core Appleby GO M.T.S.A. Aldershot GO M.T.S.A. Burlington GO M.T.S.A. Secondary Growth Area Established Neighbourhood Area	43,900	64%
Designated Growth Area	1200 King Bronte Creek Meadows Bridgeview Eagle Heights Tremaine-Dundas	23,800	35%
Rural	North Aldershot Remaining Rural Area	600	1%
City of Burlington	-	68,300	100%

^[1] Population figures include net Census undercount.

Note: Figures have been rounded and may not add up precisely.

Source: Forecast summarized by Watson & Associates Economists Ltd.

Policy Recommendations

Based on the results of this Growth Analysis Review, the following planning policy updates are recommended for the B.O.P. to guide future growth in the City of Burlington to the year 2051. These recommendations are discussed in detail in Chapter 9 of this report.

Community Area Policy Recommendations

- Revise the long-term vision and strategic growth management goals based on the evolving policy framework and new and evolving role in growth management.
- Plan for greater population and employment growth over the long term than the B.O.P. currently contemplates.



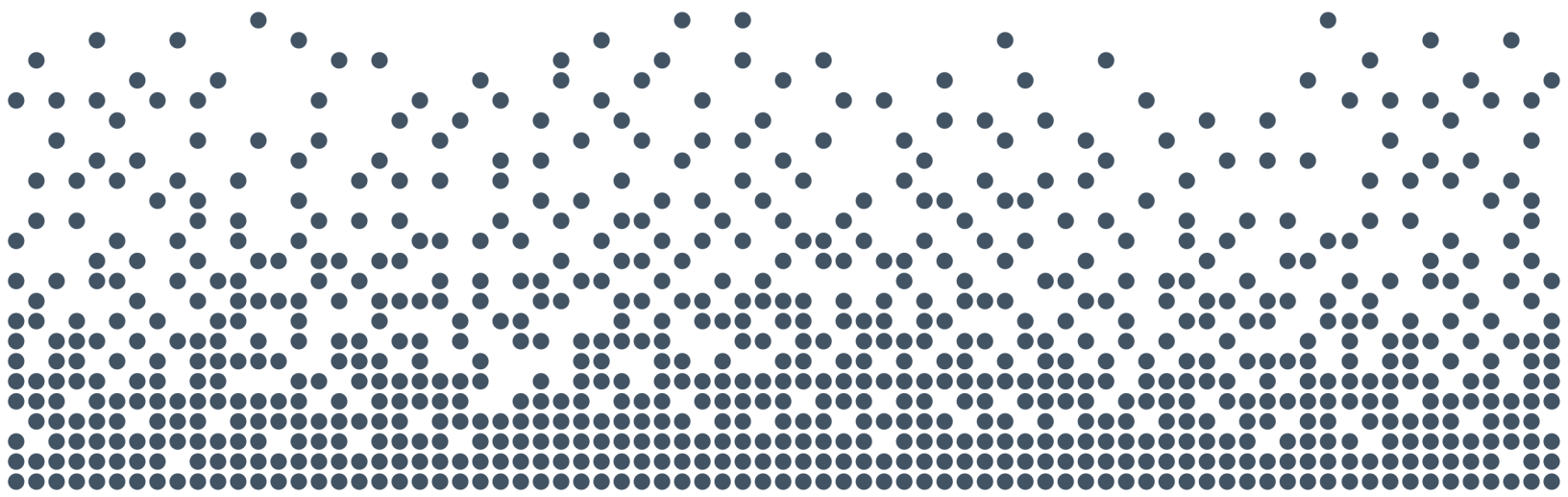
- Plan for significant residential intensification.
- Plan for minimum residential density targets in Designated Growth Areas.
- Prepare a revised phasing plan to guide residential and non-residential growth.
- Plan for office development in Major Transit Station Areas.

Employment Area Policy Recommendations

- Continue to plan for the development of the City's designated Employment Areas. Plan for employment uses under the new provincial policy framework.
- Explore opportunities for intensification of Employment Area lands.
- Prepare an updated Employment Area Strategy.

General Policy Recommendations

- Enhance tools and policies regarding growth monitoring and growth management.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson), in association with Dillon Consulting Limited (Dillon), was retained by the City of Burlington in 2024 to undertake a Growth Analysis Review to comprehensively assess the City's long-term population, housing, and employment growth outlook to the year 2051. This review will form a foundational document to the City of Burlington Official Plan (B.O.P.), Strategic Plan and other relevant documents by providing key direction with respect to the following:

- Long-term population, housing, and employment growth scenarios for the City, including a recommended scenario with additional details on growth allocations and phasing by Planning Policy Area, including Strategic Growth Area, Existing Community Area, New Community Area, and Rural Area;
- A residential intensification analysis;
- A housing market and updated needs assessment analysis;
- An Employment Area land needs analysis; and
- Planning policy recommendations related to long-term growth management and monitoring.

This work is designed to guide a variety of active City projects and studies and will be used as a key input in advancing the City's objectives. It also provides the best information currently available at the time. It is noted that this Growth Analysis Review is to be used to guide the amount, type, timing, and location of long-term population, housing, and employment growth for the City and to provide planning policy recommendations related to long-term growth management and monitoring. It is not to be used to constrain or set a capacity limit on urban development.

1.2 Background

In 2019, Dillon and Watson prepared a Growth Analysis study as input to the City's B.O.P. review process and the Halton Region Integrated Growth Management Strategy (I.G.M.S.). Since the release of the previous Growth Analysis, several key factors have



contributed to the need to review the long-term population, employment, and household forecast for the City of Burlington, including the following:

- Numerous broad changes to provincial planning policy and municipal governance, which are anticipated to have a direct impact on long-term growth management for the City of Burlington. These key provincial planning policy changes are explored in greater detail in Chapter 2 of this report;
- Updates to Canadian federal immigration targets for permanent and non-permanent residents (N.P.R.);
- Several updates (provided annually) to long-range population growth forecasts prepared by the Ministry of Finance (M.O.F.), including updated population forecasts for Halton Region;
- Evolving regional economic and real-estate market trends across the Greater Toronto and Hamilton Area (G.T.H.A.), Halton Region, and the City of Burlington;
- Halton Region Official Plan Amendment 49 (R.O.P.A. 49), approved and modified by the Ministry of Municipal Affairs and Housing (M.M.A.H.), which has introduced 347 hectares of new Community Area lands in Burlington that had not been previously considered by the 2019 Growth Analysis Study, nor by the B.O.P., 2020 or Halton Region's O.P. (R.O.P.); and
- The release of the Halton Region Joint Best Planning Estimates (J.B.P.E.) population, housing, and employment update in the fall of 2023. The primary purpose of the J.B.P.E. for Halton Region was to serve as the basis for the Region's infrastructure master planning work that is currently underway. The J.B.P.E. anticipate considerably stronger population growth over the next 10 years across each of Halton Region's Area Municipalities, consistent with the municipal housing pledges required through Bill 23 (refer to Chapter 2).

In accordance with the above, there is a need to re-examine the City of Burlington's near-term and longer-term population, housing, and employment growth forecasts, growth allocations, and growth management policies within the context of current provincial planning, regional growth trends, and local drivers of growth across the City.



Chapter 2

Planning Policy Context Influencing Long-Range Growth Forecasts in Halton Region



2. Planning Policy Context Influencing Long-Range Growth Forecasts in Halton Region

This chapter briefly explores the relevant recent changes to provincial planning policy that are influencing planning decision making and the direction regarding long-range growth management in the Province of Ontario, Halton Region, and the City of Burlington.

2.1 Provincial Planning Context

2.1.1 Bill 23

On October 25, 2022, the Ontario government introduced the *More Homes Built Faster Act, 2022* (Bill 23). Following Bill 108 and Bill 109, Bill 23 is part of a long-term strategy to address anticipated housing demand across Ontario over the next 10 years by facilitating the construction of 1.5 million homes. Bill 23 received Royal Assent by the provincial legislature on November 28, 2022. This Bill is intended to increase housing supply and provide a greater mix of ownership and rental housing options for Ontarians.

Under Bill 23, proposed changes to the *Development Charges Act*, the *Planning Act*, and the *Conservation Authorities Act* intend to reduce and exempt fees to spur new home construction and reduce the cost of housing. This includes ensuring affordable residential units, select attainable residential units, inclusionary zoning housing units, and non-profit housing developments will be exempt from paying municipal development charges (D.C.s), community benefits charges, and parkland dedication provisions.

To support the provincial commitment to getting 1.5 million homes built over the next 10 years, Bill 23 introduced sweeping and substantive changes to a range of legislation, as well as updates to regulations and consultations on various provincial plans and policies. This identified need for additional housing relates to demand associated with both existing Ontario residents and newcomers to the Province through immigration and net migration.

It is important to recognize that the municipal housing targets identified in the *More Homes Built Faster Act* are based on both existing and future housing needs. A share of the overall housing need identified through Bill 23 is attributed to a structural deficit in



the Province's existing housing inventory (also referred to as latent housing demand), while a portion of the housing need is linked to anticipated population growth over the next decade. The housing targets are adapted from the Census Division level housing needs assessment provided in the *Ontario's Need for 1.5 Million More Homes* report, prepared by Smart Prosperity Institute, dated August 2022.^[6]

Through this Bill, the Province selected municipalities, including the City of Burlington, to prepare Municipal Housing Pledges to meet these housing targets with details on how they will enable/support housing development through a range of planning, development approvals and infrastructure-related initiatives. The Province identified that these housing pledges were not intended to replace current municipal plans and are not expected to impact adopted municipal population or employment projections established through a Municipal Comprehensive Review (M.C.R.). It is further noted that the municipal housing targets do not specify housing form, density, or geographic location (e.g., greenfield, intensification).

Through the *More Homes Built Faster Act*, the Province of Ontario has assigned municipal housing targets, identifying the number of new housing units needed by 2031, impacting 29 of Ontario's largest and fastest growing single/lower-tier municipalities in Ontario. The 10-year housing target for the City of Burlington is 29,000 additional units, representing about 2.2% of Ontario's total additional 1.5 million additional housing units needed over the next decade in accordance with Bill 23. It is important to emphasize that perceived housing demand established through the *More Homes Built Faster Act* does not represent a prescribed minimum forecast that municipalities are required to achieve. Rather, it establishes housing targets that represent the desired state, expressed as a policy objective.

2.1.2 Bill 185 and Provincial Planning Statement, 2024

On August 20, 2024, the Province released the Provincial Planning Statement, 2024 (P.P.S., 2024), which came into effect on October 20, 2024.^[7] The P.P.S., 2024 was released in coordination with Bill 185, *Cutting Red Tape to Build More Homes Act*, for a

^[1] Ontario's Need for 1.5 Million More Homes. August 2022. Smart Prosperity Institute.

^[2] <https://ero.ontario.ca/notice/019-8462>.



30-day comment period. The following summarizes key highlights of the P.P.S., 2024 that are particularly relevant to this study:

- Compared to the Provincial Policy Statement, 2020 (P.P.S., 2020), the P.P.S., 2024 provides a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Policy 2.1.3 states, “Planning for infrastructure, public service facilities, strategic growth areas and Employment Areas may extend beyond this time horizon.”^[8] As such, this suggests that municipalities are to designate land to accommodate growth for at least 20 years, but not more than 30 years with the opportunity to designate additional land beyond the 30-year time horizon when planning for Employment Areas, strategic growth areas and infrastructure.^[9]
- Policy 2.1.1 of the P.P.S., 2024 notes that “planning authorities shall base population and employment growth forecasts on Ontario Population Projections published by the M.O.F. and may modify, as appropriate.” The most recent M.O.F. forecast provides population growth projections for Halton Region to the year 2051. Chapter 7 summarizes the recent M.O.F. population forecasts. It is important to note that the M.O.F. population forecasts are provided at the Census Division (C.D.) level only, which typically represents upper-tier municipalities, including separated municipalities and large urban single-tier municipalities. The M.O.F. does not provide population forecasts at the area municipal level.
- As previously noted, the P.P.S., 2024 states that urban land needs can be calculated up to 30 years, with a longer time period permitted for Employment Areas. It is further noted that the M.O.F. forecasts are not meant to replace long-term forecasting by municipalities, but rather to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations, a practice that Watson currently carries out.
- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated and available for residential development. It is noted, however, that the emphasis on intensification and redevelopment in this regard has been removed within the

^[8] Provincial Planning Statement, 2024, policy 2.1.3, p. 6.

^[9] Ibid.



context of this policy. Planning authorities are also required to maintain at all times, where new development is to occur, lands with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans.

- Under the new definition of Employment Area as per the P.P.S., 2024, municipalities are required to plan for, and protect, industrial uses based on a more narrowly scoped definition of Employment Area and are limited to these uses that are primarily industrial in nature or other uses associated or ancillary to the primary use.
- Under the P.P.S., 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Previously, under the P.P.S., 2020 and the Growth Plan, municipalities were required to review changes to designated Employment Areas during an M.C.R. or Comprehensive Review. Under the P.P.S., 2024, municipalities are required to demonstrate that there is an identified need for the removal and that the land is not required for Employment Area uses over the long term. Furthermore, municipalities need to demonstrate that the proposed change from an Employment Area to a non-Employment Area use does not undermine the overall viability of the Employment Area.^[10]
- A key policy change resulting from Bill 185 that has impacted the City of Burlington relates to the proposed removal of planning responsibilities for upper-tier municipalities. This concept of “upper-tier municipalities without planning responsibilities” and “upper-tier municipalities with planning responsibilities” was first introduced under the *Planning Act* as part of Bill 23, the *More Homes Built Faster Act*, which was released on October 25, 2023. “Upper-tier municipalities without planning responsibilities” includes a list of seven municipalities comprising all the upper-tier municipalities in the Greater Toronto Area (G.T.A.), plus the County of Simcoe, the Region of Niagara, and the Region of Waterloo. Bill 185 builds upon this and amends the *Planning Act* to implement changes to certain upper-tier municipalities, “upper-tier municipalities without planning responsibilities.”

^[10] Provincial Planning Statement, 2024, policy 2.8.2.5, p. 15.



- Under Bill 185, the Region of Halton, the Region of Peel, and the Region of York have become “upper-tier municipalities without planning responsibilities” as of July 1, 2024, while the Regions of Durham, Waterloo, and Niagara will follow in 2025. We anticipate there will continue to be a strong need for impacted upper-tier municipalities, including Halton Region, to address regional growth management coordination efforts (e.g., coordination of local municipal growth forecasts, assessment of regional infrastructure needs, and review of cross-jurisdictional issues) working with their area municipalities.

A cohort survival forecast methodology has been utilized to generate the population and housing forecast for the City of Burlington (see Appendix A for further details). The P.P.S., 2024 does not require adherence to standard guidelines regarding growth projection and urban land needs. In place of specific guidelines, the P.P.S., 2024 indicates that the long-term need for urban lands will be informed by “provincial guidance.” Notwithstanding these changes to the P.P.S., 2024, long-range demographic and economic growth forecasts and urban land needs assessments remain a fundamental background component to the Official Plan (O.P.) review process.

2.2 Halton Region Official Plan Amendment 49

As part of the Region’s O.P. review process, the Region undertook a growth strategy to accommodate population, housing, and employment growth to 2051 in accordance with provincial planning requirements. This process, referred to as the Halton Region’s I.G.M.S., provided a comprehensive examination of the long-term growth outlook for the Region of Halton, including four long-range growth concepts for the Region to the year 2051. Each of these growth concepts explored various forward-looking assumptions regarding residential intensification and greenfield density by Area Municipality within the context of provincial planning policy. Provided below is a brief chronology of the key deliverables and outcomes of this process to provide context for this local growth analysis study for the City of Burlington.

After the passing of Regional Official Plan Amendment (R.O.P.A.) 48, three Council workshops starting in November 2021 and ending in February 2022 were held to provide Regional Council and the public with information about how the draft preferred growth concept was formulated. Following the February 16, 2022 Council Workshop, Regional Council directed Regional staff to prepare a R.O.P.A. that would implement a



preferred growth concept to examine growth in Halton Region in two phases – growth prior to 2041 and growth between 2041 and 2051.^[11]

In June 2022, the Region adopted R.O.P.A. 49, which provided growth direction for the Region and its area municipalities to the year 2041. In November 2022,^[12] the Province approved R.O.P.A. 49 with modifications, which brought into effect the following:

- Updates to the population and employment forecasts for Halton Region to 2051;
- Distribution of population and employment growth to 2051 by area municipality;
- Updates to the intensification and density targets by changing the residential intensification target from 40% to 45%;
- Revisions to the policy and identification of Regional intensification corridors; and
- Updates to the policy regarding Regional Employment Areas.

The population and employment growth allocations by area municipality, as per R.O.P.A. 49, are shown in Figure 2-1 and Figure 2-2.

Figure 2-1
Halton Region
R.O.P.A. 49 – Population Distribution by Area Municipality

Municipality	2021	2041	2051
Burlington	195,000	240,050	265,160
Oakville	220,000	313,460	349,990
Milton	137,980	227,000	350,870
Halton Hills	66,010	98,890	132,050
Halton Region	620,990	929,400	1,098,070

Source: Region of Halton – Regional Official Plan Amendment 49 – Table 1.

^[11] Amendment No. 49 to The Regional Plan Official Plan for the Halton Planning Area Regional Municipality of Halton – an Amendment to Implement the Integrated Growth Management Strategy – June 2022.

^[12] Halton Regional Official Plan Amendment 49, as approved with modifications by the Minister, November 4, 2022.



Figure 2-2
Halton Region
R.O.P.A. 49 – Employment Distribution by Area Municipality

Municipality	2021	2041	2051
Burlington	98,340	114,330	124,390
Oakville	111,980	160,880	181,120
Milton	44,390	100,120	136,270
Halton Hills	24,510	45,900	65,460
Halton Region	279,220	421,230	507,240

Source: Region of Halton – Regional Official Plan Amendment 49 – Table 1.

In December 2023, the Province of Ontario passed Bill 150, which includes Schedule 1 – *Official Plan Adjustments Act, 2023*. This bill rescinds the decisions made by the Province in November 2022 and reverts back to the O.P. or O.P. Amendment that was adopted.^[13]

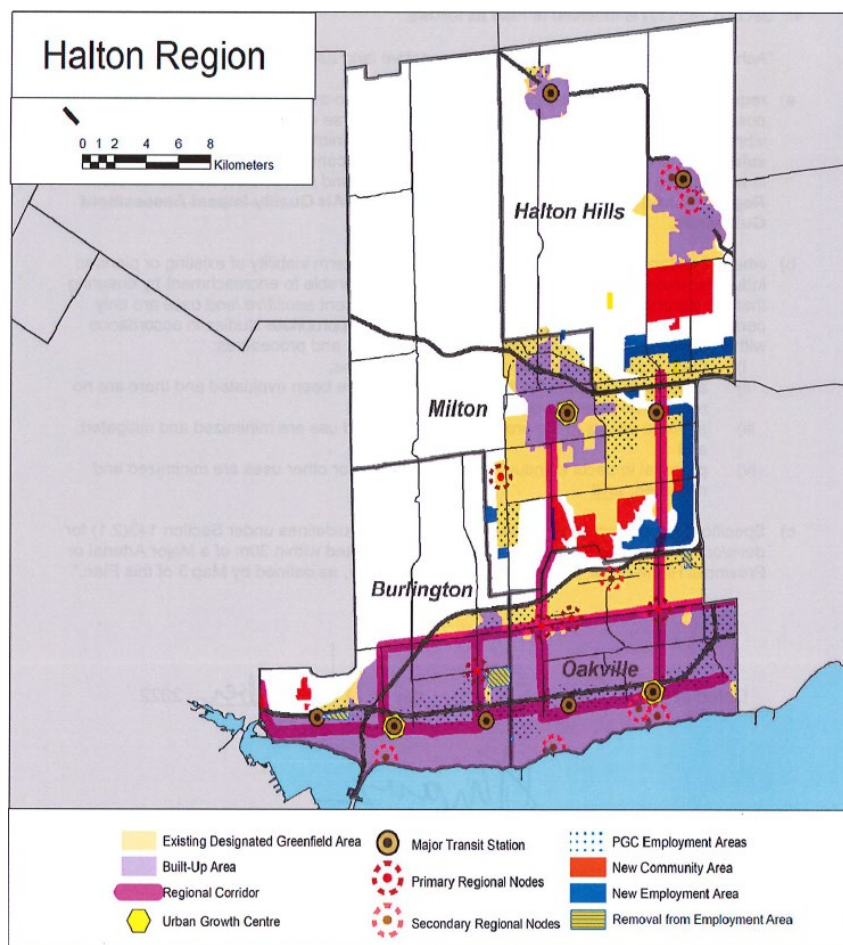
In February 2024, the Province announced Bill 162, the *Get It Done Act*; on May 16, 2024, it received Royal Assent. Schedule 3 of Bill 162 includes a table of the adjustments that were made to various R.O.P.s across the Province.^[14] Figure 2-3, below, illustrates the urban expansion lands that the Province has identified for Halton Region, in the Town of Milton and Halton Hills. It is noted that as per approved and modified R.O.P.A. 49 new Community Areas of Bridgeview and Eagle Heights in the City of Burlington were also reinstated in the Halton R.O.P. and the B.O.P. As previously mentioned, R.O.P.A. 49, approved and modified by the M.M.A.H also introduced 347 hectares of new Community Area in Burlington (former Employment Areas at 1200 King and Bronte Creek Meadow) that had not been previously considered by the 2019 Growth Analysis Study, nor by the City of Burlington's 2020 O.P. (B.O.P., 2020) or Halton Region's O.P. (R.O.P.).

^[13] Bill 150 2023: Schedule 1 – Official Plan Adjustments Act, 2023, section 3.

^[14] Bill 162: Schedule 3 – Official Plan Adjustments Act, section 7 iA.C.



Figure 2-3
Halton Region
R.O.P.A. 49 – Existing and Urban Expansion Lands



Source: Appendix 1 of the Minister's Decision Amendment No. 49 Halton Region Official Plan, November 4, 2022.

2.3 Joint Best Planning Estimates

Halton Region periodically develops a set of detailed population and employment forecasts known as the Best Planning Estimates (B.P.E.), which is the result of the



Region's Official Plan Review process. The last time the Region revised its B.P.E. forecast prior to the most recent update was in 2011.^[15]

In September 2023, the Region released the Joint Best Planning Estimates (J.B.P.E.), which identifies population, housing, and employment by area municipality and smaller geographic areas to the year 2051. The J.B.P.E. are a planning tool that is used to identify where and when development is expected to occur to assist the Region's Area Municipalities in planning complete communities. The J.B.P.E. were developed in response to Bill 23 (as mentioned in subsection 2.1.1). It is further noted that the J.B.P.E. are based on projected land capacity for infrastructure planning purposes. The primary purpose of the J.B.P.E. update was to serve as the basis for the Region's infrastructure master planning work that is currently underway. The J.B.P.E. anticipate considerably stronger population growth over the next 10 years across each of Halton Region's Area Municipalities consistent with the municipal housing pledges required through Bill 23 as mentioned in section 1.2. In accordance with the recent pace of new housing construction across the Province as well as the near-term population and housing growth outlook, the Province's goal to achieve 1.5 million additional homes over the next 10 years is very ambitious. As such, the housing targets established for the 29 large and fast-growing municipalities, which includes the City of Burlington, are also ambitious.

Figure 2-4 summarizes the J.B.P.E. and the R.O.P. population forecast for the City of Burlington. Key observations include:

- Under the J.B.P.E. growth forecast, by 2051 the City of Burlington is expected to reach a population of 323,600, which is 58,400 people more than what R.O.P. has identified. The J.B.P.E. suggests that the City will grow at an annual rate of 1.7%, which is 1.5 times higher than R.O.P.;
- The J.B.P.E. population forecast anticipates that the City will grow at an annual rate of 3.0%, over the first 10-year period, then averaging 1.7% over the 30-year period, whereas R.O.P. has identified a rate of 1.1 % over the 2021 to 2031 period, then moderating to 1.0% over the 30-year period; and

^[15] Best Planning Estimates of Population, Occupied Dwelling Units and Employment, 2011-2031, June 2011, Regional Municipality of Halton.



- The rate of population growth for the City of Burlington identified through the J.B.P.E. is significantly higher than the average annual population growth rate the City has historically achieved over the past two decades.

Figure 2-4
City of Burlington
Population Comparison

Year	J.B.P.E.	R.O.P.
2021	193,100	195,000
2031	259,100	217,800
2041	297,600	240,100
2051	323,600	265,200

Incremental Growth	J.B.P.E.	R.O.P.
2021 to 2051	130,500	70,200
Annual Growth	4,300	2,300
Growth Rate	1.7%	1.1%

Note: Population includes net Census undercount. Figures have been rounded and may not add precisely.

Source: J.B.P.E. forecast derived from Halton Region Joint Best Planning Estimates, September 14, 2023. R.O.P. forecast derived from Region of Halton – Regional Official Plan– Table 1, presented by Watson & Associates Economists Ltd.

2.4 Burlington Official Plan

The B.O.P., 2020 was approved by Halton Region on November 30, 2020. Parts of the B.O.P., 2020 remain under appeal at the Ontario Land Tribunal (OLT).

2.4.1 Burlington City System

The B.O.P. identifies the Urban Area, the Rural Area, and North Aldershot, as well as the built boundary and the designated greenfield area (D.G.A).^[16] The planning policy areas are briefly summarized below.

^[16] It is noted that Designated Greenfield Area is now referred to as Designated Growth Area under the P.P.S., 2024. It is also noted that the 'Built Boundary' is no longer a defined term in the P.P.S., 2024.



Urban Area

The City System identifies the Urban Area, which are lands that are to accommodate most of the City's anticipated population and employment growth. Within the Urban Area, municipal water and wastewater is provided to accommodate existing and future development.

Rural Area and North Aldershot

The Rural Area includes the agricultural system, natural heritage system, rural settlement areas, and mineral resource extraction areas. The B.O.P. states that within the Rural Area prime agricultural areas should be protected and natural heritage systems should be protected and enhanced. North Aldershot is distinct from the Rural Area.

Designated Greenfield Area

The B.O.P., 2020 recognizes the D.G.A. as lands outside the Built Boundary but within the Urban Area. It represents lands that were not built up as of 2006.

2.4.2 Burlington Urban Structure

The B.O.P., 2020 has an Urban Structure Plan that identifies the Urban Centres, Major Transit Station Areas, Mixed Use Nodes and Intensification Corridors, and Residential Neighbourhood Areas that fit within Burlington's urban area. Additionally, the Urban Structure includes lands designated for employment uses; Natural Heritage System, Major Parks and Open Space; Mineral Resource Extraction Area; and Infrastructure and Transportation Corridors.

Urban Centres

The B.O.P., 2020 identifies two Urban Centres in the City of Burlington, the Downtown Urban Centre and Uptown Urban Centre. These areas are meant to be mixed use and have a mix of established neighbourhoods and changing growth areas. The Downtown Urban Centre will also serve as Burlington's City Centre.

Urban Growth Centre and Major Transit Station Areas

Outlined in the P.P.S. 2024, a major transit station area (M.T.S.A.) is defined as the area including and surrounding existing and planned higher-order transition stations or



stops within a settlement area. M.T.S.A.s are generally defined as the area within an approximate 500- to 800-metre radius of a transit station, or approximately a ten-minute walk.

M.T.S.A.s are designated as a focus for intensification and are planned to meet minimum density targets. Land uses within these areas will be planned to be transit supportive, with planned developments serving as a destination site for transit riders. Residential development in these areas will largely include medium- and high-density development such as townhouses or apartments. These areas will also contain intensified commercial and employment uses. The City of Burlington has three M.T.S.A.s: Aldershot GO, Appleby GO, and Burlington GO. It is noted that the Burlington GO M.T.S.A. is also identified in the B.O.P., 2020 as Burlington's Urban Growth Centre (U.G.C.); however, this term is no longer referred to in the P.P.S., 2024.

Mixed Use Nodes and Intensification Corridors

The B.O.P. Urban Structure identifies these lands as areas with a greater concentration and higher development intensity of commercial, residential, and employment uses than surrounding areas. These lands will accommodate higher-density residential and a variety of employment and institutional uses that will serve as focal points of activity.

Residential Neighbourhood Areas

The Residential Neighbourhood Areas is a significant portion of the Urban Area. These lands are intended to accommodate a range of residential forms and other residential supportive land uses that are part of an urban residential environment.

2.4.3 *Burlington Growth Framework*

The B.O.P., 2020 identifies four areas, Primary Growth Areas, Secondary Growth Areas, Employment Growth Areas, and Established Neighbourhood Areas through its Growth Framework. The framework delineates where new growth and intensification in Burlington should be directed.

Primary Growth Area

The Primary Growth Area consists of areas identified within the Urban Structure as Urban Centres and M.T.S.A.s. The Primary Growth Area will be where the majority of



new growth and intensification will be accommodated in Burlington. This area will also be the most appropriate location for tall buildings and high-density residential.

Secondary Growth Area

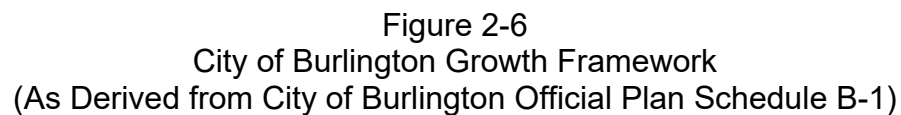
The Growth Framework identifies the Secondary Growth Area as the Mixed Use Nodes and Intensification Corridors within the Urban Structure. The Secondary Growth Area is where significant population and employment growth will be accommodated in Burlington. The built form will generally be low and mid-rise with some high-rise where appropriate in accordance with the B.O.P.

Established Neighbourhood Area

The B.O.P., 2020 includes the Established Neighbourhood Area which covers the majority of residential lands in the City of Burlington. The built form of this area primarily consists of low-rise, low-density residential, but also forms of medium- and high-rise residential. This area is not suited for heavy intensification but will have some opportunities for intensification through additional dwelling units and high-density development where appropriate.

Employment Growth Area

The Employment Growth Area consists of employment-oriented designations and will be suited for intensification of employment growth.





Chapter 3

Overview of Macro-Economic and Regional Trends



3. Overview of Macro-Economic and Regional Trends

This chapter summarizes the provincial and regional economic trends anticipated to continue to influence the population and employment growth outlook for the Region of Halton and the City of Burlington over the next three decades.

3.1 Global Economic Trends

In its latest World Economic Outlook, the International Monetary Fund (I.M.F.) is forecasting global economic growth will remain relatively stable from 3.3% in 2023 to 3.2% in 2024 and 2025. For advanced economies, the projected economic growth of 1.8% in 2024 is slightly higher than the I.M.F. forecast of 1.5% from its January 2024 projections. Looking forward, the outlook has slightly improved from I.M.F.'s January 2024 projections, with forecast growth of 1.8% in 2024 and 1.8% in 2025. Forecast economic growth for advanced economies, however, is little over half what was achieved in 2022, with 90% of advanced economies projected to experience a sharp slowdown due to higher unemployment. Growth prospects for emerging markets and developing economies are much more varied but, overall, have strengthened from the I.M.F.'s January 2024 outlook and are noticeably stronger relative to advanced economies with economic growth projections of 4.2% in both 2024 and 2025.^[17]

Within the United States (U.S.), real gross domestic product (G.D.P.) grew by 2.9% in 2023 and, in 2024, economic growth is projected to remain relatively stable at 2.8% before decreasing to 2.2% in 2025. U.S. economic growth is projected to remain relatively stable at 2.8% before decreasing to 2.2% in 2025. This outlook is due to several factors, including, but not limited to, rising government and household debt, high interest rates, a tightening in financial conditions, and a slowdown in global trade. These trends in global economic conditions are important to monitor, particularly in the U.S., as they have direct influence on macro-economic conditions in Canada.

^[17] International Monetary Fund, World Economic Outlook, October 2024: Policy Pivot Rising Threats.



3.2 Evolving Macro-Economic Trends Following COVID-19

Since the outbreak of coronavirus disease (COVID-19) was declared a pandemic on March 12, 2020, its economic effects have been substantial. Employment sectors, including travel, tourism, hospitality, manufacturing, and energy were hit relatively hard by social distancing measures. In contrast, knowledge-based sectors adapted well to remote and hybrid work, often thriving. Changes in social behaviour, including physical distancing, and increased remote work have led to ongoing economic disruptions, particularly in how work is done. Additionally, rising trade tensions and geopolitical unrest continue to highlight vulnerabilities in globalization and supply chains, which were severely disrupted during the peak of the pandemic.

Following a sharp national economic recovery in 2020 due to COVID-19 policy measures, federal economic support, fiscal stimulus, and vaccine rollouts, the Canadian economy experienced significant economic growth in 2021 and 2022. Despite this recovery, there are growing macro-economic headwinds and increased volatility influencing the economy at national, provincial, and regional levels. Persistently high global and national inflation levels following the pandemic required an aggressive response by central banks, leading to sharp increases in interest rates and quantitative tightening measures.^[18] As of October 2024, both the Bank of Canada and the U.S. Federal Reserve have begun reducing interest rates in response to declining inflation rates and slowing economic growth. The Bank of Canada has cut its overnight lending rate multiple times in 2024, reducing the policy rate to 3.25% as of December 2024. Similarly, the U.S. Federal Reserve has also implemented interest rate cuts to support economic growth. As of October 2024, Canada's inflation rate was at 2.0%, down from its peak of 8.1% in June 2022.

While the most recent trends in inflation and interest rates are comparably more favourable to Canadian residents, businesses, and investors (relative to the previous two years), their effects often lag and vary considerably. Furthermore, recent wage and earnings growth has not kept up with the pace of rising costs for goods and services over the past several years, with housing and food costs representing key stressors for most Canadian families. It is also important to recognize that ongoing trade disruptions, geopolitical conflicts, U.S. protectionist policies (i.e. tariffs), and relatively tight labour

^[18] Quantitative tightening is a process whereby a central bank reduces the supply of money circulating in the economy by selling financial assets, mainly government bonds.



conditions in some sectors continue to elevate economic risk and generate potential global supply shortages for certain goods and services. This may continue to limit the effectiveness of Bank of Canada monetary policy in controlling inflationary pressures and stimulating domestic economic growth and capital investment.

As of 2024, rising public sector and household debt in Canada remains a key economic concern, largely due to pandemic response measures, alongside increasing household debt levels, most notably driven by a significant increase in housing / living costs in Canada's major urban centres. Since peaking in February 2022, the national housing market has shown signs of cooling, with notable declines in both sales and price growth in recent years driven by higher mortgage rates relative to pandemic conditions. It is noted, however, that trends vary widely by region, and housing affordability (both ownership and rental) has been steadily eroded for the past decade across most Canadian regions. It is also important to note that recent trends towards lower interest rates are likely to have a limited impact on improving housing affordability, as lower borrowing costs are anticipated to be offset by a return in rising housing prices.

While these immediate concerns highlight potential setbacks to the country's economic recovery, the longer-term outlook for Canada's economy and housing market remains positive. Continued investments in infrastructure and technology, along with a resilient labour market, are anticipated to drive national economic growth. Policymakers will need to navigate these complexities carefully to foster stability and support recovery in the coming years.

3.3 COVID-19 and the Changing Nature of Work

In addition to its broader impacts on the economy, COVID-19 is also accelerating changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks, virtual meetings, cloud technology, artificial intelligence, and other remote work collaboration tools. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional, and industrial real-estate space needs.



As of 2016, it was estimated that approximately 9% of the City of Burlington workforce was working from home on a full-time basis. This estimate increased to 11% in 2024, excluding hybrid workers, who are captured as residents with a usual place of work. From a municipal planning and urban development perspective, it is important to consider the impact of hybrid workers when assessing non-residential space needs, particularly in the office sector.

In addition to work at home employment, there are workers within the City of Burlington who have no fixed place of work (N.F.P.O.W.).^[19] The percentage of workers within the City who reported as N.F.P.O.W. was approximately 9% in 2016 and 2024.^[20] It is anticipated that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will remain relatively high across the City of Burlington over the long term, driven by continued growth in knowledge-based employment sectors and technological advancement.

3.4 Provincial Economic Outlook within the Broader Canadian and Global Context

3.4.1 Ontario Population Growth Outlook within the Canadian Context

Canada's population is experiencing significant growth. In 2023, the population increased by 3.2%, adding 1,271,000 individuals. With population growth outpacing output G.D.P. growth, the G.D.P. per capita has trended lower and is now well below pre-pandemic levels.^[21] The challenges facing growth in the G.D.P. per capita in

^[19] Statistics Canada defines N.F.P.O.W. employees 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.”

^[20] Work at home and N.F.P.O.W. employment derived from 2016 and 2021 Statistics Canada Census data. It is noted that the 2021 Census data may not be reliable due to the timing of enumeration coinciding with COVID-19.

^[20] Work at home and N.F.P.O.W. employment derived from 2016 and 2021 Statistics Canada Census data. It is noted that the 2021 Census data may not be reliable due to timing of enumeration coinciding with COVID-19.

^[21] Statistics Canada, Economic and Social Reports, *Canada's Gross Domestic Product Per Capita Perspectives on the Return to the Trend* report by Carter McCormack and Weimin Wang, April 24, 2024.



Canada include labour productivity and a rising unemployment rate for recent immigrants, which has increased from 9.5% to 12.6% over the past five years.^[22]

The most recent 2024 M.O.F. projections show a decrease in the growth outlook for Ontario to 20.9 million by 2046, largely driven by the recent federal government announcement to reduce the percentage of non-permanent residents (N.P.R.) from 7.3% of the national population to 5.0%.^{[23],[24]} Since the release of the 2024 M.O.F. projections, the federal government announced an additional reduction in the number of new permanent residents it will accept, lowering the 2025 and 2026 targets of 500,000 to 395,000 in 2025, 380,000 in 2026, and 365,000 in 2027. These changes are anticipated to have a further downward impact on future population growth in Canada, including Ontario (refer to subsection 3.3.2).^[25]

When examining forecast immigration levels required over the long term to achieve the 2024 M.O.F. projections for Ontario, these revised projections appear slightly ambitious. The 2024 M.O.F. population forecast continues to project a higher long-term population growth rate for the Province compared to historical trends experienced over the past 20 years, with an annual growth rate of 1.3% between 2021 and 2051. This translates into an annual population increase of 242,600 people. Comparatively, the level of annual population growth forecast for Ontario under the 2023 M.O.F. forecast is 65% higher than the level of population growth achieved between 2001 and 2021.

Similar to the broader Canadian economy, the economic base of Ontario, as measured by G.D.P. output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector over the past several decades. This shift has largely been driven by G.D.P. declines in the manufacturing sector, which were accelerated prior to and following the 2008/2009 global economic downturn. It is noted, however, that these G.D.P. declines in the manufacturing sector have started to

^[22] TD Economic Reports, Canadian Employment (July 2024), *Canada's job market softens further in July*, published August 9, 2024.

^[23] The N.P.R. share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents.

^[24] The N.P.R. national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.

^[25] Government of Canada News Release, October 24, 2024.

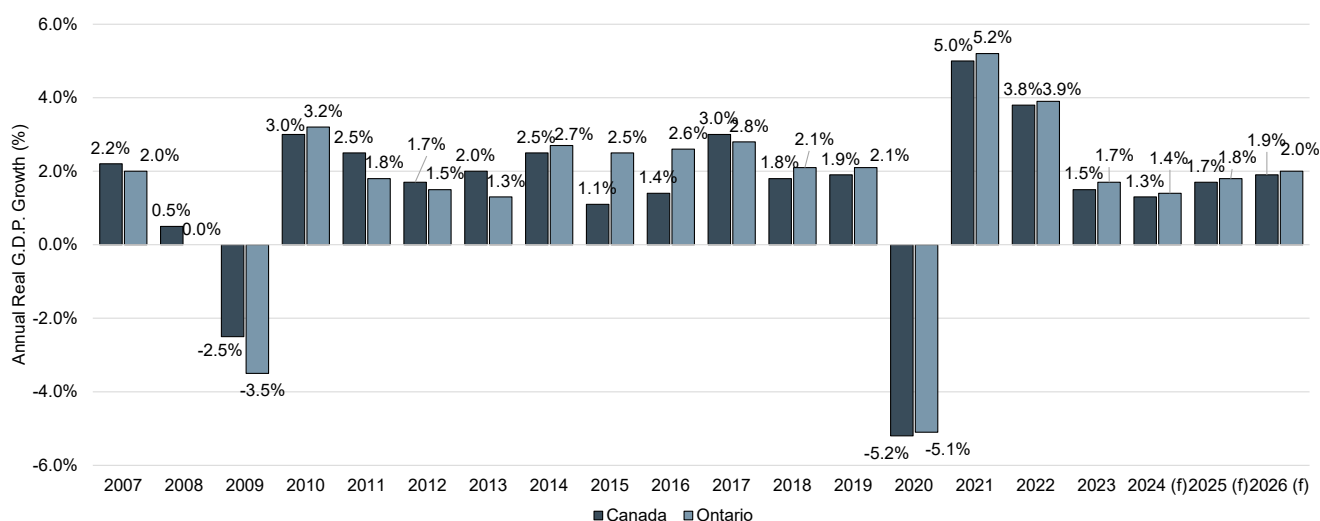
<https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/government-of-canada-reduces-immigration.html>



show signs of stabilization, both prior to the COVID-19 pandemic and through the more recent economic recovery.

As illustrated in Figure 3-1, the Ontario economy contracted by 5.1% in 2020 before rebounding by 5.2% in 2021. BMO Capital Markets has forecast that the Ontario economy will continue to soften throughout 2024, growing by 1.3%, while the overall Canadian economy is expected to strengthen to an average annual G.D.P. rate of 2.0% in 2025. Economic growth in Ontario is forecast to increase at a slightly higher rate than the overall Canadian economy.^[26]

Figure 3-1
Province of Ontario and Canada
Annual Real Gross Domestic Product (G.D.P.) Growth, Historical (2006 to 2023),
and Forecast (2024 to 2026)



Note: 2021 (Ontario), 2024, and 2025 are forecast by BMO Capital Markets Economics.
Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, February 7, 2025, by Watson & Associates Economists Ltd.

3.4.2 Canadian Immigration Targets

During the recovery period from COVID-19, immigration targets were raised in Canada primarily in response to labour force demands faced by the country. Immigration accounts for almost 100% of Canada's labour force growth and nearly 80% of its

^[26] BMO Capital Markets Economics, Provincial Economic Outlook, December 6, 2024.



population growth. As a result of the increased targets, Canada welcomed 471,800 and 485,000 new permanent residents in 2023 and 2024, respectively.

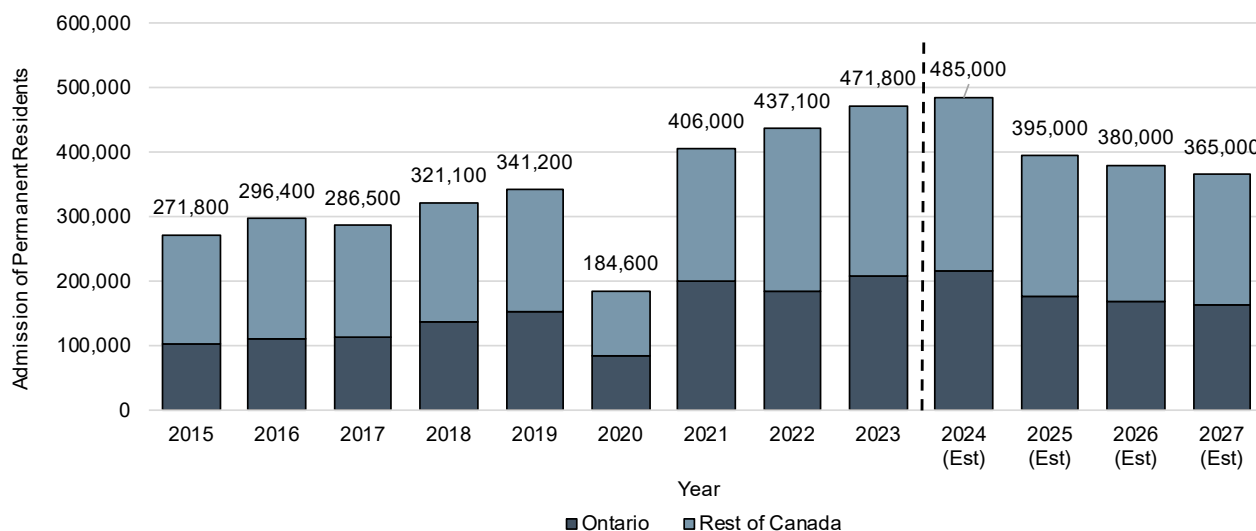
More recent targets issued by the federal government in October 2024 show previous targets have been decreased by about 21%. As previously noted, the federal government has also announced it will reduce the percentage of N.P.R.s from 7.3% of the national population to 5.0% by the end of 2026.^[27]^[28] These amendments address the changing needs of the country to ease pressures on housing, infrastructure, and social services. Figure 3-2 shows annual admissions to Canada and Ontario since 2015. In 2020, national and provincial immigration levels sharply declined due to COVID-19. Immigration in 2021 rebounded strongly, resulting in 405,000 permanent residents admitted to Canada in 2021, of which roughly half were accommodated in the Province of Ontario that year. Based on 2024 data and looking forward through 2025 and beyond, despite the target reductions noted above, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

^[27] The N.P.R. share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents in Canada.

^[28] The N.P.R. national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.



Figure 3-2
Admission of Permanent Residents in Ontario and Canada
Historical (2015 to 2023) and Forecast (2024 to 2027)



Source: 2015 to 2023 derived from Immigration, Refugees, and Citizenship Canada (I.R.C.C.) April 30, 2024 data. 2024 to 2027 federal targets from Government of Canada's Immigration Levels Plan for 2024 to 2026 and 2025 to 2027, and Ontario target estimated based on historical share of about 45% of the Canadian Permanent Residents Admissions from 2018 to 2023, by Watson & Associates Economists Ltd.

3.5 Regional Labour Force and Population Growth Trends

3.5.1 Regional Labour Force Growth Trends

Figure 3-3 summarizes total labour force and unemployment rate trends for the Hamilton Census Metropolitan Area (C.M.A.). Labour force data is not available for the City of Burlington, but it is captured in the broader Hamilton C.M.A. Key observations include the following:

- Since 2009, the Hamilton C.M.A. economy has experienced steady labour force growth and a declining unemployment rate leading up to the COVID-19 pandemic in early 2020.
- Following the economic recovery from the pandemic lockdowns in 2020 and 2021, the labour force for the Hamilton C.M.A. steadily recovered, reaching new record highs in 2024.



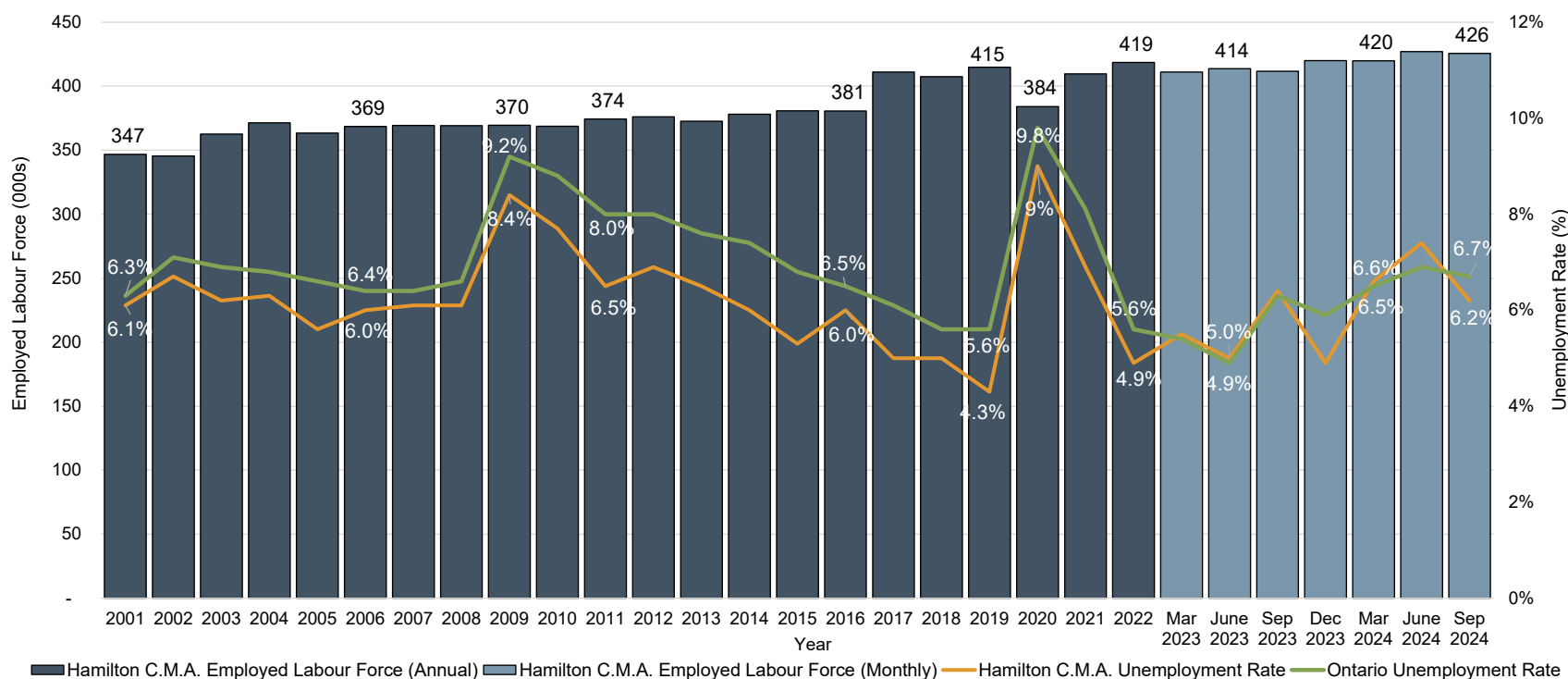
- The pace of labour force growth across the Hamilton C.M.A. has slowed and the unemployment rate has increased since June 2023 following measures by the Bank of Canada in early 2022 to tighten monetary conditions.^[29]
- Accordingly, the Hamilton C.M.A. real-estate market, including the City of Burlington, has softened since 2023 relative to trends experienced during the height of the pandemic.

Looking forward, the long-term economic outlook for the Hamilton C.M.A. remains very positive. Regional labour force growth, however, is anticipated to remain relatively weaker in the near-term in response to slowing provincial and national economic conditions and the macro-economic headwinds summarized in sections 3.1 and 3.2.

^[29] Since March 2022, the Canadian prime interest rate increased from 2.45% to a peak of 7.2% in 2024. The Canadian prime interest is 5.45% as of December 2024. In addition, the Bank of Canada introduced quantitative tightening measures in 2022, a process whereby the Bank of Canada reduces the supply of money circulating in the economy by selling its accumulated assets, mainly bonds.



Figure 3-3
Hamilton Census Metropolitan Area (C.M.A.)
Labour Force Trends, 2001 to 2024 Year-To-Date



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.

Source: Toronto C.M.A. employed labour force and unemployment rate from Statistics Canada Table 14-10-378-01, Table 14-10-0385-01, and Table 14-10-0096-01. Province of Ontario unemployment rate from Statistics Canada Table 14-10-0327-01. Derived by Watson & Associates Economists Ltd.

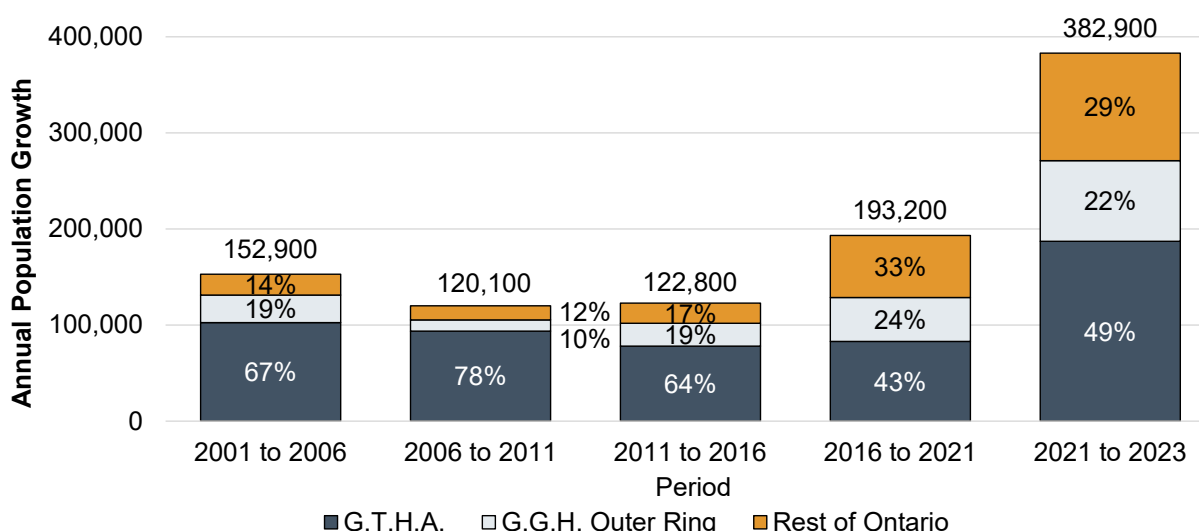


3.5.2 Provincial Population Growth Trends

Figure 3-4 illustrates the population growth in the Province by sub-regional area. Key observations include the following:

- The share of population growth outside the G.T.H.A. steadily increased over the past three Census periods from 2006 to 2021. Most notably, during the most recent Census period (i.e., 2016 to 2021), the share of total provincial population growth for all areas outside the G.G.H. increased from 12% between 2006 and 2011, to 17% from 2011 to 2016, to 33% between 2016 and 2021.
- Except for the 2021 to 2023 period, the share of provincial population growth in the G.T.H.A. has declined in recent years, falling from 78% between 2006 and 2011, to 64% from 2011 to 2016, and then to 43% between 2016 and 2021.
- These historical trends in provincial population growth suggest that while the G.T.H.A. will continue to experience a large share of provincial population growth, this population share is anticipated to continue to shift outward into the G.G.H. Outer Ring and the remaining sub-areas of Ontario.

Figure 3-4
Province of Ontario by Regional Area
Population Growth, 2001 to 2023



Notes: Population includes net Census undercount. G.T.H.A. means Greater Toronto and Hamilton Area; G.G.H. means Greater Golden Horseshoe.

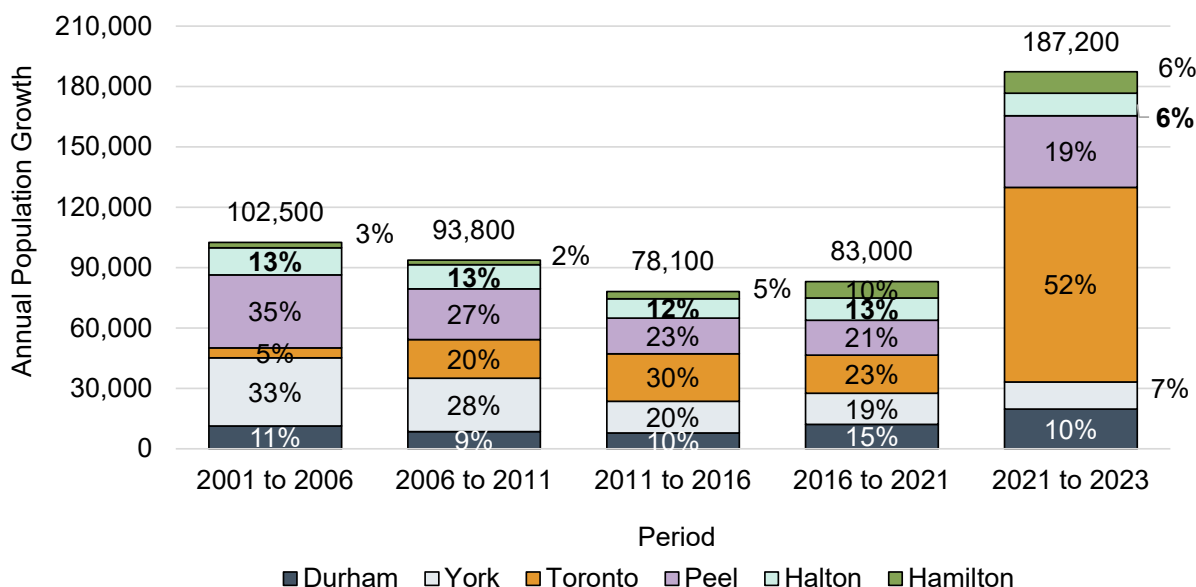
Source: Statistics Canada Table 17-10-0139-01, summarized by Watson & Associates Economists Ltd.



3.5.3 Population Growth Outlook for the Greater Toronto Area

Building on Figure 3-4, Figure 3-5 illustrates population growth trends within the G.T.H.A. by single- and upper-tier municipality. Between 2001 and 2006, York and Peel Region, combined, accounted for 68% of the G.T.H.A.'s population growth; however, the share of population growth for these two Regions declined to 26% between 2021 and 2023. Conversely, Durham Region, Halton Region, and the City of Hamilton have collectively experienced an increasing share of population growth over the past three Census periods, most notably during the recent 2016 to 2021 period. It is noted that during the most recent postcensal period, between 2021 and 2023, a significant increase in the share of population growth occurred within the City of Toronto, representing approximately 52% of the total G.T.H.A. population growth, largely driven by increased population growth levels associated with N.P.R. in the City of Toronto during this time period.

Figure 3-5
Greater Toronto and Hamilton Area
Historical Population Growth, 2001 to 2021



Note: Population includes net Census undercount. The 2021 population has not been finalized and utilizes the 2016 net Census undercount.

Source: Statistics Canada Table 17-10-0139-01, summarized by Watson & Associates Economists Ltd.



3.5.4 Long-Term Growth Outlook for Halton Region

There are two main components of population growth,^[30] natural increase (births less deaths) and net migration, which is further broken down into three broad categories including:

- **International Net Migration** – represents international immigration less emigrants, plus net N.P.R.s. Over the last decade, this component of net migration represented an increasing source of net migration for Halton Region;
- **Interprovincial Net Migration** – comprises in-migration less out-migration from other Canadian provinces/territories. Historically, this has not been a major source of net-migration for Halton Region; and
- **Intraprovincial Net Migration** – includes in-migration less out-migration from elsewhere within the Province of Ontario. This has been a significant, but declining source of net migration for Halton Region over the last decade.

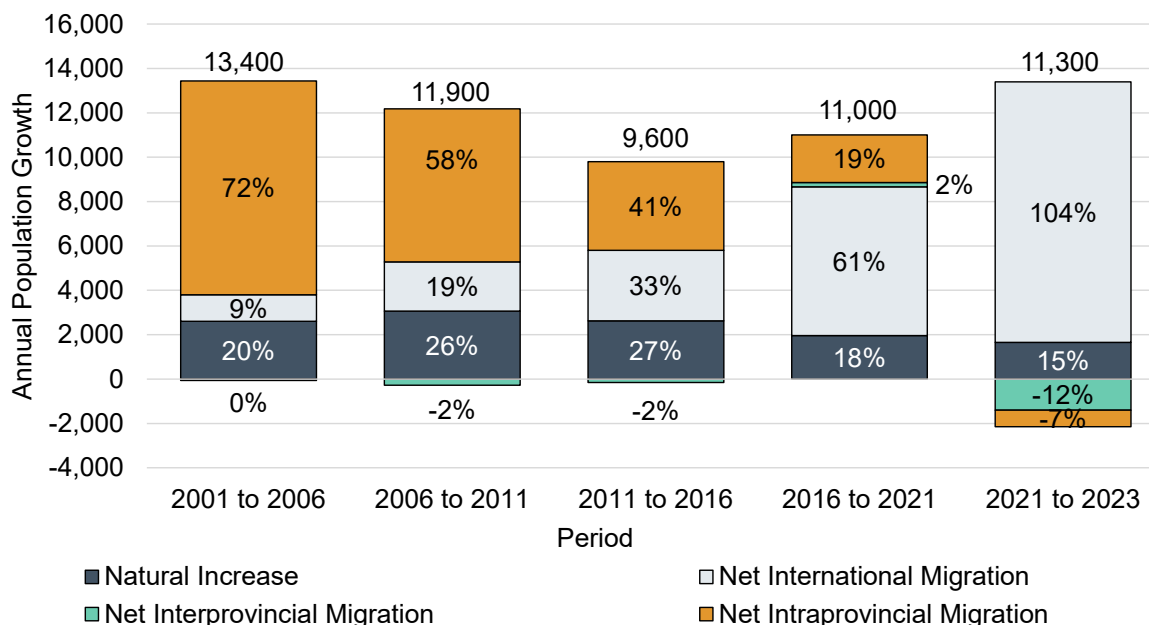
Figure 3 illustrates the components of population growth within Halton Region over the past 20 years. Historically, between 2001 and 2023, Halton's population growth has largely been driven by net migration, more specifically net intraprovincial migration and net international migration. Of the net intraprovincial migration Halton Region has experienced over the past two decades, approximately 79% is from the G.T.H.A., more specifically from Peel Region and the City of Toronto.

While net intraprovincial migration represents the largest component of population growth in Halton Region, it has experienced a decline in the share of population growth over the past two decades, falling from 72% between 2001 and 2006 to 19% between 2016 and 2021. In the most recent period, between 2021 and 2023, net intraprovincial migration represents -7% of the Region's population growth. In contrast, net international migration has experienced a significant increase during the same time period. Between 2001 and 2006, net international migration accounted for 9% of the Region's population growth while, over the most recent period, this share increased to 104%. It is further noted that Halton has experienced positive growth in natural increase, driven by the Region's relatively high share of young adults and children, most notably in the northern Area Municipalities of Halton Region.

^[30] The smallest geographic dissemination of this information is available at the Census Division level (i.e., Halton Region).



Figure 3-6
Halton Region
Components of Population Growth, 2001 to 2023



Note: Population includes net Census undercount. Figures have been rounded and may not add up precisely.

Source: Statistics Canada Table 17-10-0139-01 and Table 17-10-0140-01, summarized by Watson & Associates Economists Ltd.

3.5.5 Observations

Over the past several decades, the provincial economy has been steadily shifting away from goods-producing sectors and increasingly moving towards services-producing and knowledge-based sectors. As a result of these continued structural changes occurring in the macro-economy, it is important to recognize that the trends mentioned within this chapter will generate both positive and disruptive economic impacts related to employment growth, local business investment, and labour force demand. These disruptive forces are also anticipated to have long-term impacts on non-residential space requirements and population growth patterns. Despite the near-term economic headwinds discussed in this chapter, the longer-term economic and housing outlook for Halton Region and the City of Burlington remains very positive and will continue to be strongly tied to the economic outlook of the broader regional economy, which comprises a large portion of the City's commuter-shed.



Over the past 20+ years (excluding the 2021 to 2023 period), population growth rates have been decreasing across the G.T.H.A. Between 2001 and 2021, Halton Region has experienced a relatively stable share of absolute population growth relative to the G.T.H.A. Over the next 30 years, Halton's share of G.T.H.A. population growth is anticipated to stabilize or slightly increase, given the range of housing opportunities available across the Region's established neighbourhoods and its remaining and new greenfield areas.



Chapter 4

City of Burlington Recent Demographic, Housing and Employment Trends



4. City of Burlington Recent Demographic, Housing and Employment Trends

This chapter examines the recent demographic, housing and employment trends in Halton Region and, more specifically, the City of Burlington. For additional details regarding historical household trends, please refer to Appendices B through E.

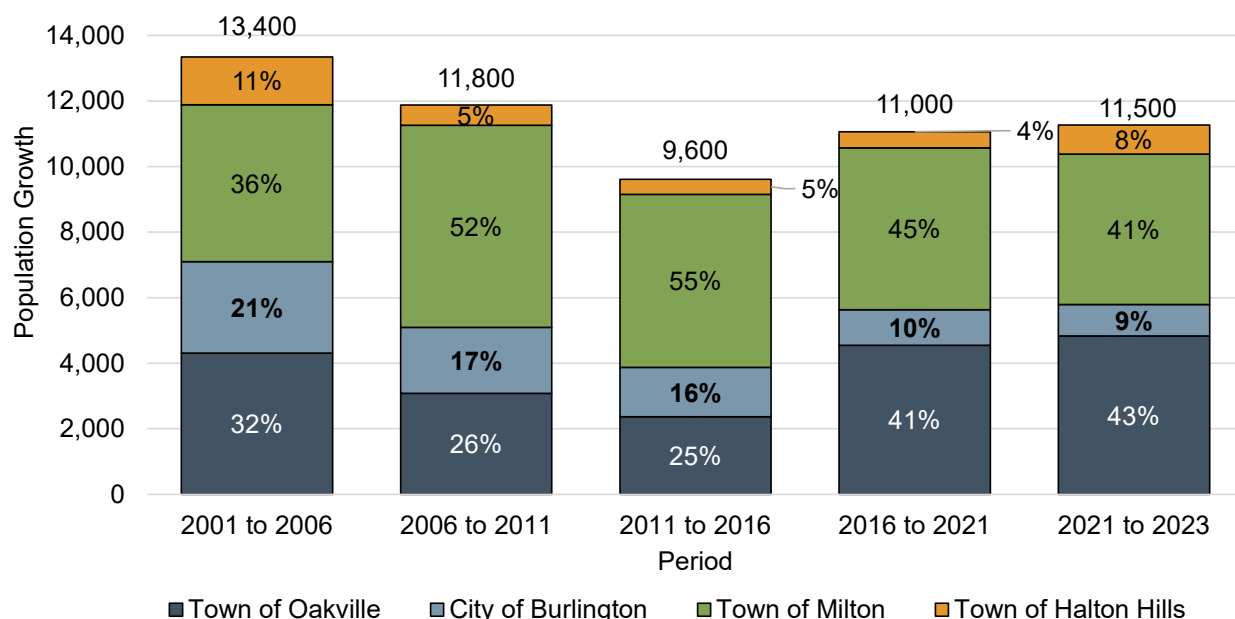
4.1 Population Growth Trends

Figure 4-1 summarizes incremental population growth in Halton Region by area municipality over the 2001 to 2023 historical period. Key observations are as follows:

- While Halton Region has experienced steady population growth over the past 20 years, increasing by approximately 229,400 persons, incremental population growth in the Region declined between 2001 and 2016 before stabilizing during the 2016 to 2021 period.
- The Town of Milton accounted for the largest share of growth in the Region in all historical periods, averaging 46% of historical population growth between 2001 and 2021; comparatively, during this period, the City of Burlington's share of growth decreased from 21% to 10%.
- Between 2021 and 2023, Burlington's share of population growth in Halton Region decreased to 9% in accordance with postcensal data provided by Statistics Canada.
- In accordance with recent residential building permit activity between 2020 and 2023 (new units only), the City of Burlington represented approximately 10% of anticipated new residential housing construction (as measured in terms of number of housing units) in Halton Region.



Figure 4-1
Halton Region
Population Growth by Area Municipality, 2001 to 2023



Note: Population includes net Census undercount. Figures have been rounded and may not add up precisely.

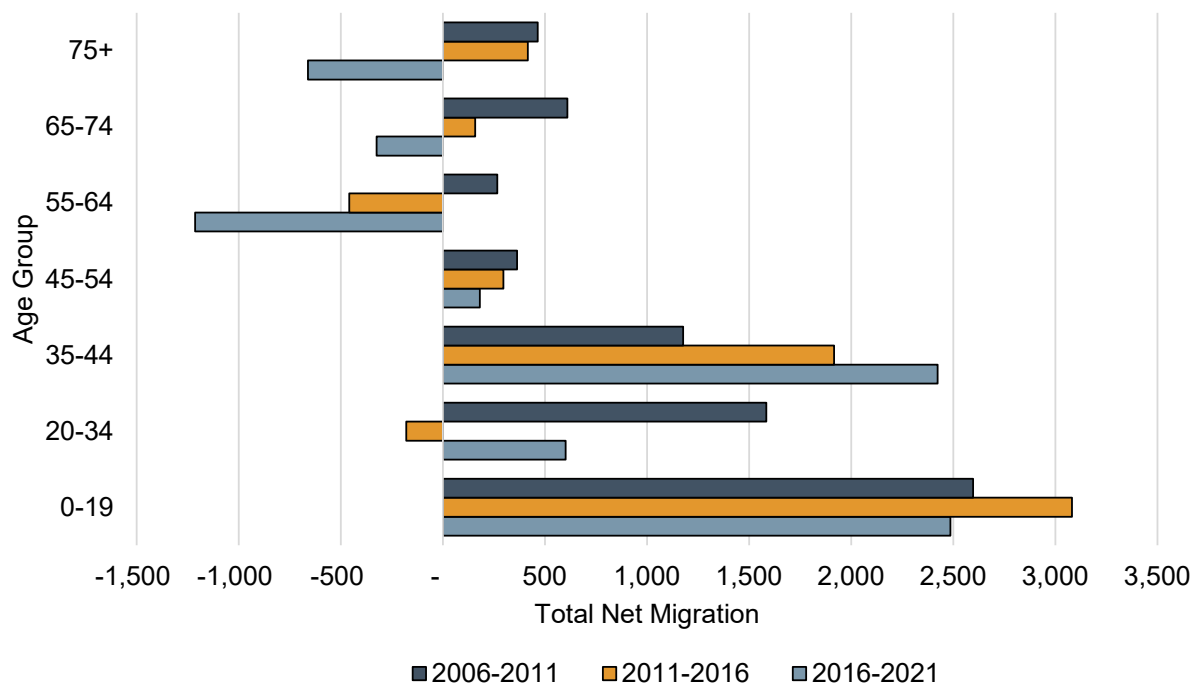
Source: Statistics Canada Table 17-10-0139-01 and Table 17-10-0140-01; summarized by Watson & Associates Economists Ltd.

Figure 4-2 summarizes historical trends in total net migration by major age group between 2006 and 2021. A further discussion regarding forecast demographic trends by major age for the City is provided in Chapter 7. Key observations are as follows:

- Over the past 15 years, people between 35 and 44 years of age and under 19 have represented the highest concentration of newcomers to the City of Burlington. In the most recent 2016 to 2021 Census period, these two age groups, combined, accounted for 86% of total net migration to the City.
- The number of young adults (aged 20 to 34) and people between 35 and 44 years of age increased in the 2016 to 2021 period, while older age groups 55 and older experienced net out-migration.
- These trends regarding net migration by major age group are anticipated to continue over the 2021 to 2051 planning horizon.



Figure 4-2
City of Burlington
Net Migration by Major Age Group, 2006 to 2021



Note: Population includes net Census undercount. Figures have been rounded and may not add up precisely.

Source: Derived from Statistics Canada Table 17-10-0152-01, summarized by Watson & Associates Economists Ltd.

For additional information regarding the components of population growth, population by major age group, and historical net migration, please refer to Appendix C.



4.2 Housing Growth Trends

4.2.1 *Recent Residential Development Trends*

4.2.1.1 *Census Housing*

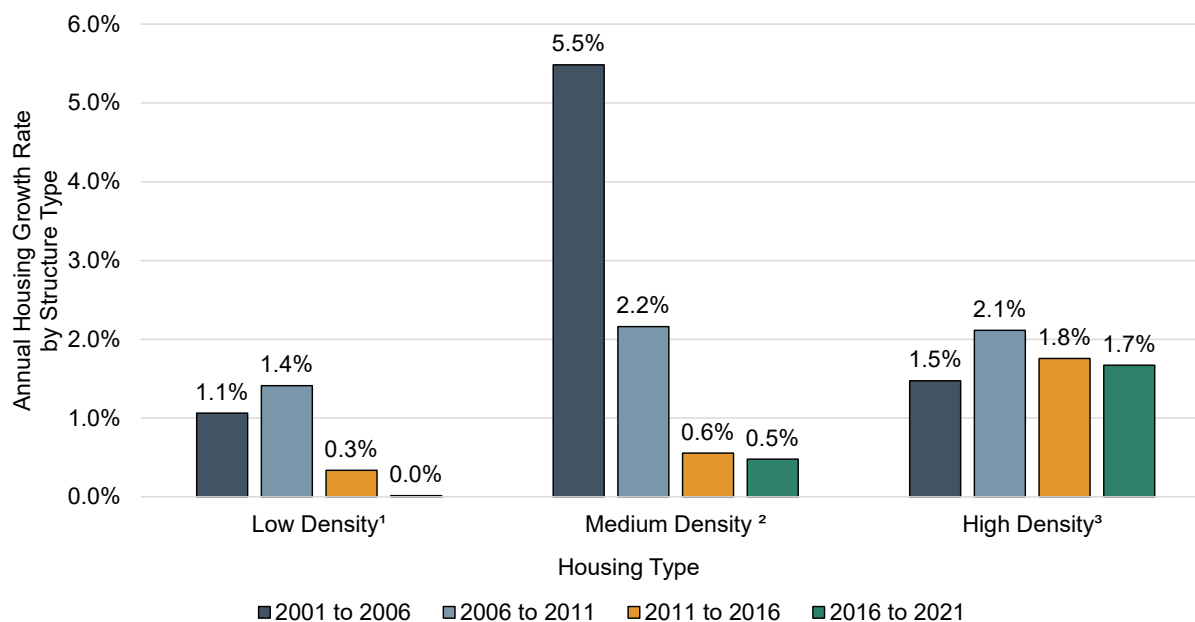
Figure 4-3 summarizes the annual housing growth rate in the City of Burlington by housing structure type (i.e., density type) for the historical periods between 2001 and 2021. Key observations are as follows:

- Between 2006 and 2021, the annual growth rate for all housing density types progressively declined.
- Low-density housing types experienced the lowest annual growth rate among density types in all four Census periods. During the 2016 to 2021 period, low-density housing experienced minimal growth.
- In contrast, high-density housing was the only housing density type to experience an increased annual growth rate over the last 20 years, rising from 1.5% to 1.7% between the first and last Census period examined over the past 20 years and peaking at an annual growth rate of 2.1% over the 2006 to 2011 period.

For additional information regarding historical occupancy trends and the ratio of primary household maintainers (i.e., headship rates), please refer to Appendices D and E.



Figure 4-3
City of Burlington
Housing Growth by Structure Type, 2001 to 2021



[¹] Includes singles and semi-detached units.

[²] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[³] Includes stacked townhouses, bachelor, 1-bedroom, and 2-bedroom+ apartment units, and secondary suites.

Note: Figures have been rounded and may not add up precisely.

Source: Historical data derived from Statistics Canada Census profiles for the City of Burlington summarized by Watson & Associates Economists Ltd.

4.2.1.2 Residential Building Permit Trends

Figure 4-4 summarizes historical trends in residential building permit activity (i.e., new units) for the City of Burlington over the 2009 to 2024 period. Over the past 15-year period:

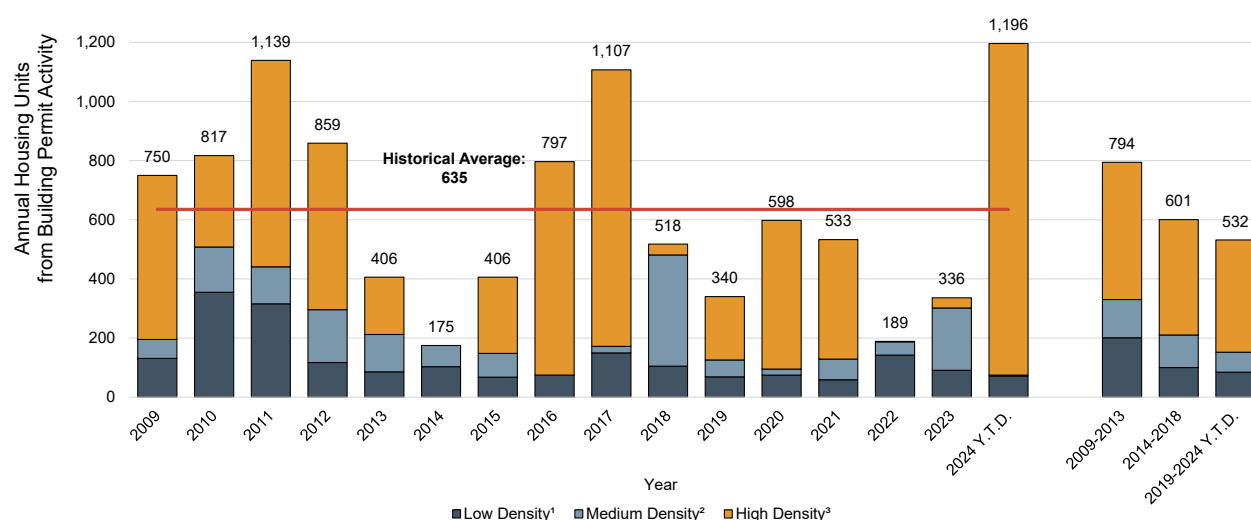
- The City has issued an average of approximately 635 residential building permits per year related to new residential dwellings;
- The average number of total residential building permits issued has progressively decreased in each five-year period reviewed, particularly due to a decline in grade-related dwellings (i.e. medium- and low-density housing); and
- The number of high-density building permits issued in the City of Burlington peaked in 2016, 2017, and most recently 2024 year-to-date with 930 average



annual units. It is noted, however, that the number of pre-construction sales for high-density condominiums has significantly declined in the City of Burlington since 2023.

A further discussion is provided in Chapter 6 regarding historical housing trends by structure type and forecast housing demand over the next decade by structure type and tenure (i.e., ownership and rental housing).

Figure 4-4
City of Burlington
Housing Growth by Structure Type, 2009 to 2024 Y.T.D.



[1] Includes single and semi-detached houses.

[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[3] Includes stacked townhouses, bachelor, 1-bedroom, and 2-bedroom+ apartment units, and self-contained living accommodations such as apartments and small residential units that are located on a property that have a separate main residential unit.

Note: 2024 year-to-date (Y.T.D.) reflects building permits until December 12, 2024.

Source: City of Burlington building permit data summarized by Watson & Associates Economists Ltd.



4.1 Socio-Economic Trends and Housing Affordability

4.1.1 *Halton Region and City of Burlington Housing Price Trends*

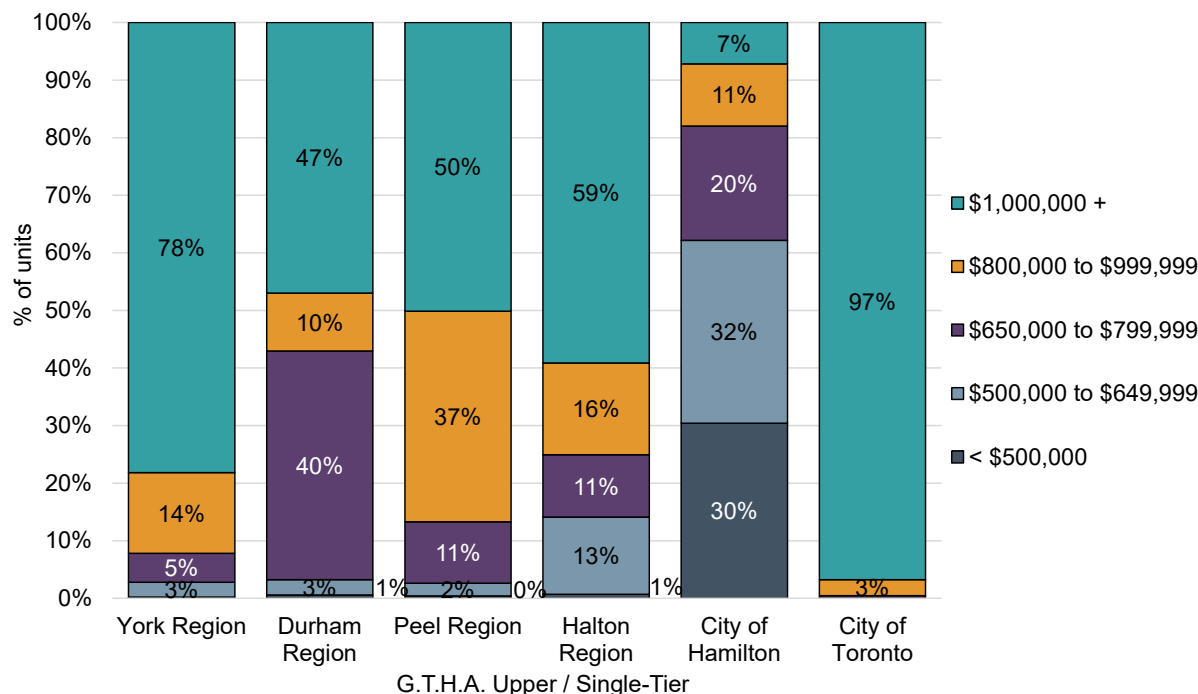
Average new single detached home sales for Halton Region between 2020 and 2023 by price point are presented in Figure 4-5 in comparison to other upper-tier/single-tier municipalities in the G.T.H.A. Key findings are as follows:

- Roughly 40% of absorbed new single-detached homes in Halton Region over the past 3+ years have been under the \$1 million price point, which represents a relatively higher percentage than the City of Toronto and York Region, but comparably lower than all other upper-tier/single-tier G.T.H.A. municipalities;
- The absence of single detached housing prices under the \$1 million price point is placing constraints on low-density housing growth across Halton Region and most areas of the G.T.H.A.; and
- Declining housing affordability emphasizes greater need for a broader range of housing options. For Burlington, demands are greatest for missing middle housing and high-density housing forms.^[31]

^[31] The “missing middle” describes a range of medium-density housing types between single detached houses and apartment buildings that have gone “missing” from many of our cities in the last 60 to 70 years. This includes a range of multi-unit or clustered housing types compatible in scale with single-family homes that help meet the growing demand for walkable urban living, such as duplexes, triplexes, fourplexes, rowhouses, and townhouses.



Figure 4-5
Greater Toronto Hamilton Area
Absorbed Single Detached Units by Price Range, 2020 to Year-to-Date 2024



Source: Derived from Canada Mortgage and Housing Corporation, Absorbed Unit Price 2020 to Q3 2024

4.1.2 City of Burlington Household Income

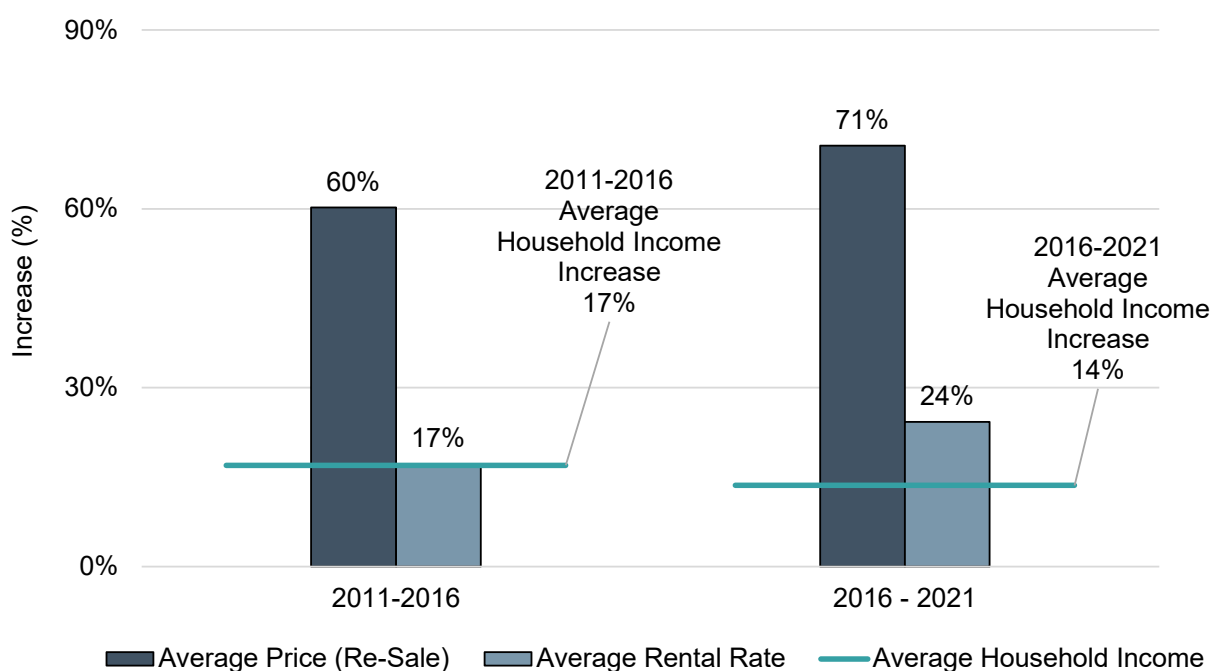
Figure 4-6 summarizes the average household income, average housing re-sales, and average monthly rental rate in the City of Burlington from 2011 to 2021. Key observations include the following:

- Average household income, average re-sale prices, and average monthly rental rates all increased between the 2011 to 2016 period and the 2016 to 2021 period.
- Average re-sale housing prices in the City of Burlington increased by 60% and 71% over the 2011 to 2016 period and the 2016 to 2021 period, respectively.
- Average monthly rent also steadily increased, albeit at a lower rate than housing re-sale prices, increasing by 17% and 24% over each period.
- Average household income grew at a much slower rate than housing re-sale prices, increasing by 17% and 14% over the two five-year periods.



- In accordance with the above, household income levels within the City of Burlington have not kept pace with housing prices or rents, which has further eroded housing affordability over the past decade. These trends illustrate the need for the City to continue to explore a range of housing options by structure type and tenure to meet a broad range of housing needs across all age groups and income levels.

Figure 4-6
City of Burlington
Housing Prices and Household Income



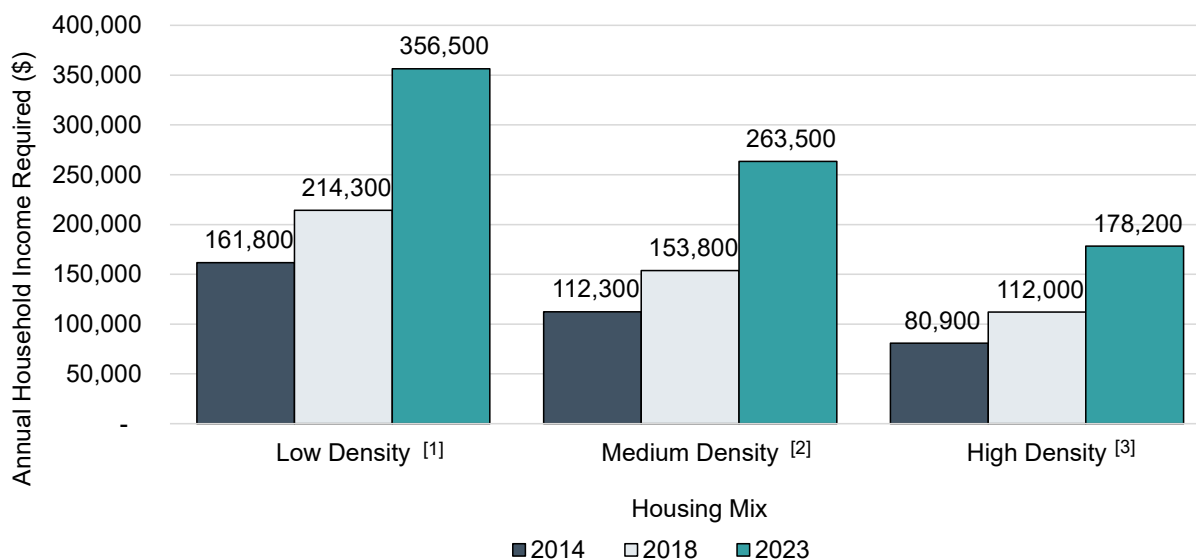
Note: Price (re-sale) increase includes the sale prices of single detached, townhouse/row, and apartment property types.

Source: Derived from Canada Mortgage and Housing Corporation Rental Market Survey, Statistics Canada Census Data, 2011 to 2021, and listing.ca, by Watson & Associates Economists Ltd.

Figure 4-7 summarizes annual household income required to purchase different housing structure types in the City of Burlington between 2014 and 2023. Across all housing density types, household incomes required to afford an average-priced home have increased between 2.2 to 2.3 times over the past nine years.



Figure 4-7
City of Burlington
Housing Prices and Household Income



[1] Includes singles and semi-detached houses.

[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

[3] Includes stacked townhouses, bachelor, 1-bedroom, 2-bedroom+ apartment units.

Note: Price (re-sale) increase includes the sale prices of single detached, townhouse/row, and apartment property types and assumes a 25-year mortgage and 10% downpayment.

Source: Derived from listing.ca by Watson & Associates Economists Ltd.

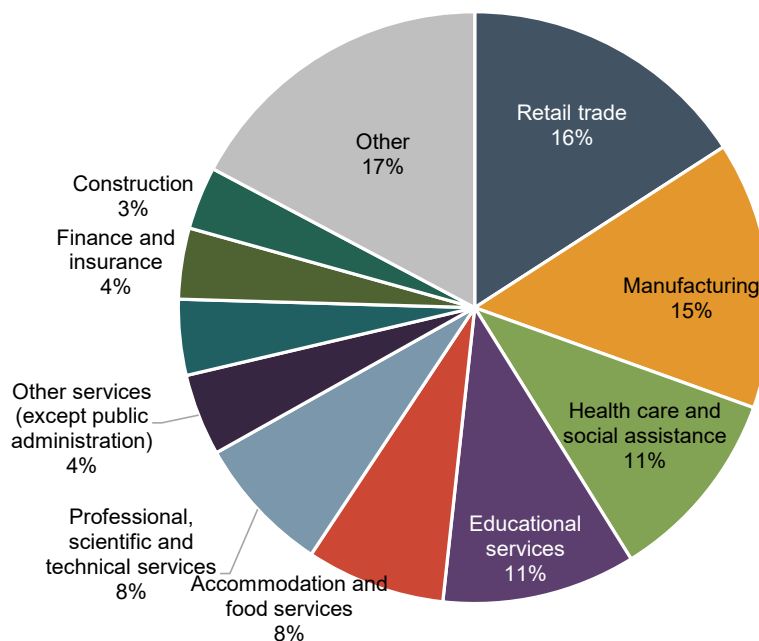
4.2 Recent Non-Residential Development Trends

4.2.1 Local Employment Trends by Sector

The City of Burlington has a diverse employment base as illustrated in Figure 4-8. The largest sector in the City is retail trade, which accounts for 16% of the total employment. Other key sectors include manufacturing, healthcare and social assistance, and educational services. With the exception of manufacturing, most jobs in the City are focused on services-producing sectors rather than goods-producing sectors.



Figure 4-8
City of Burlington
Total Employment by Industry Sector, 2023



Note: Figures have been rounded and may not add precisely.

Source: Data derived from 2023 Halton Region Employment Survey, summarized by Watson & Associates Economists Ltd.

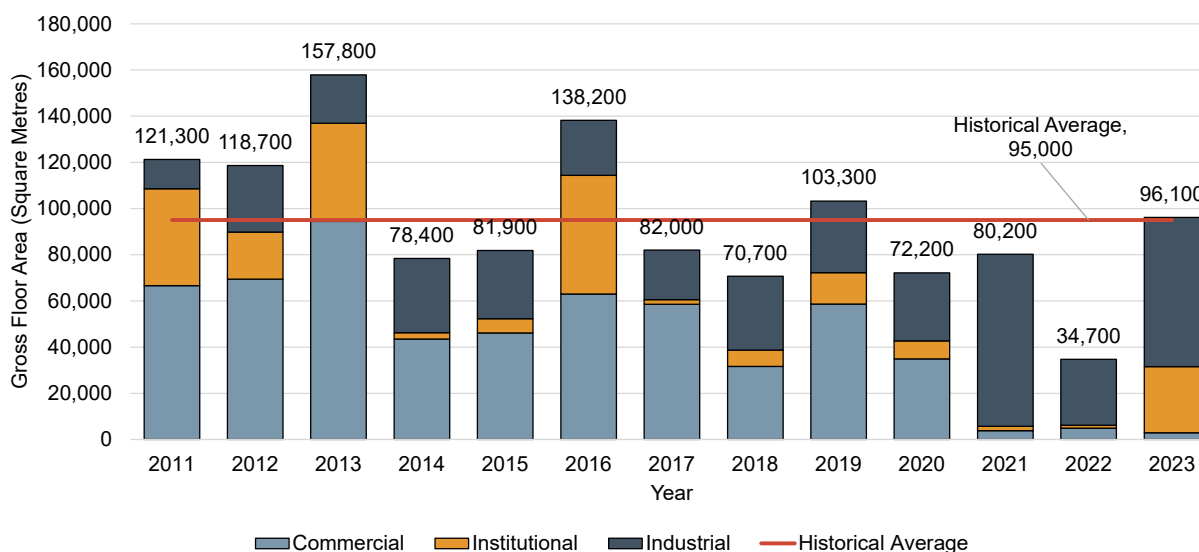
4.2.2 Non-Residential Development Activity by Sector

Figure 4 summarizes non-residential building permit activity for the City of Burlington over the 2011 to 2023 period. The following key observations can be made:

- The City of Burlington averaged 95,000 sq.m (1,022,500 sq.ft.) of non-residential development activity annually;
- Non-residential development has been relatively well balanced between industrial, commercial, and institutional sectors;
- Since 2021, industrial development activity has strengthened in the City relative to the previous years; and
- In contrast, the level of commercial and institutional development activity has steadily declined over the past decade.



Figure 4-9
City of Burlington
Annual Non-Residential Development Activity, 2011 to 2023



Note: The non-residential development activity (sq.ft.) metric contains new construction and additions/expansions and is net of demolitions. Barns, greenhouses, and parking structures have been excluded from this analysis, as they do not generate a significant amount of employment growth. Figures have been rounded.

Source: Derived from the City of Burlington non-residential building permit data from 2011 to 2023, summarized by Watson & Associates Economists Ltd.



Chapter 5

Residential Intensification Supply Analysis



5. Residential Intensification Supply Analysis

5.1 Overview

The purpose of this chapter is to describe the approach and method used to estimate the potential for residential intensification within the City of Burlington. The potential for intensification is estimated for the Strategic Growth Areas (S.G.A.), which include the Primary and Secondary Growth Areas identified in the Burlington Official Plan (BOP, 2020). The M.T.S.A.s are part of the City's S.G.A.s and Primary Growth Areas, in addition to the centres along with other Special Planning Area (S.G.A.s) that are implemented through Regional Official Plan Amendment No 49 (R.O.P.A. 49). The key finding of this analysis is that a more than sufficient supply of residential intensification potential is in place to accommodate forecast demand to 2051. There is some additional unit potential through "Gentle Densification" (i.e., Additional Residential Units (A.R.U.s), other missing middle typologies and infill) within the Established Neighbourhood Areas, which is small relative to the overall scale of growth expected. Nevertheless, understanding the amount and potential distribution of these units within the community is still important from a long-range community planning perspective. The results of the intensification supply analysis are described in the sections below.

5.2 Structure and Approach

The study area for the analysis was identified in consultation with City of Burlington staff based on previous municipal land use planning work. Of particular note from a growth management perspective is that the City is almost fully built out from a greenfield land supply standpoint, meaning that Burlington will continue to experience an increasing share of new residential and non-residential development towards intensification within the existing built-up area (B.U.A.). A relatively limited amount of vacant greenfield land remains to accommodate new housing growth over the long-term planning horizon to 2051.



The priority areas are the S.G.A.s that are intended to be the focus of the most significant growth and change over time. As previously identified in Chapter 2, these areas include:

- The Primary Growth Areas identified by the City of Burlington and implemented through R.O.P.A. 49, which include the Aldershot GO and Appleby GO M.T.S.A.s, the Burlington GO (former U.G.C.) M.T.S.A., and the Downtown and Uptown Core Areas;
- The Secondary Growth Areas are located within the City's Mixed-use nodes and Intensification corridors as identified on Schedule B: Urban Structure of the B.O.P., 2020. They also comprise select vacant residential sites and employment designated sites located immediately adjacent to a Major Arterial or multipurpose arterial street.^[32] The City's Urban Residential Neighborhood are not identified as primary or secondary growth areas, however, are anticipated to accommodate a limited amount of intensification through various forms of “Gentle Densification” as discussed in more detail in the final section of this chapter;^[33] and
- The S.P.A.s identified in the R.O.P., including the lands at 1200 King Road (former Employment Area lands converted to residential uses) and the Bronte Creek Meadow area.^[34]

An estimate of new units expected to be added through Gentle Densification within the existing neighbourhoods has also been made, which is described separately at the end of this chapter. The S.G.A.s, including Primary and Secondary Growth Areas and S.P.A.s are illustrated in Figure 5-1, below.

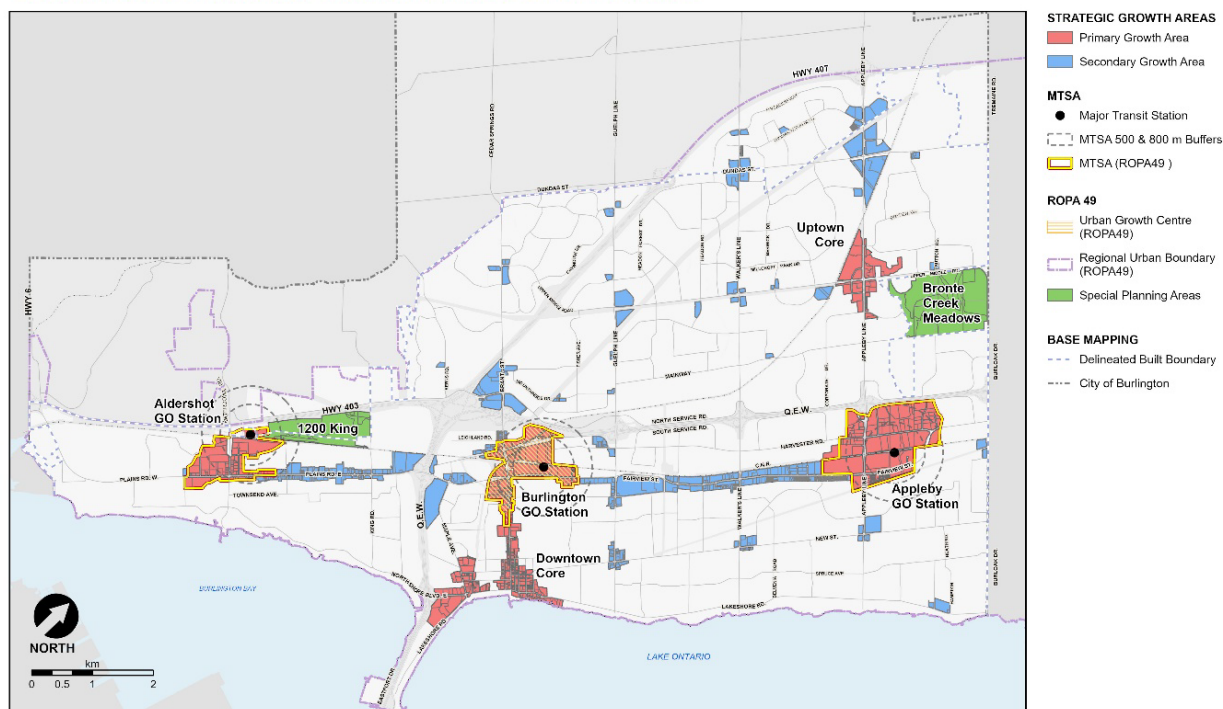
^[32] The specific designations include: Mixed Use Commercial Centre, Neighbourhood Centres, Local Centres, Employment Commercial Centres, Urban Corridor, Urban Corridor – Employment, General Employment and Business Corridor.

^[33] Gentle Densification refers to the units added to established residential areas mainly in the form of A.R.U.s either through the renovation or addition of new internal, attached, or detached accessory buildings.

^[34] While 1200 King and Bronte Creek Meadows are not within the Built Boundary, these two areas are identified as S.G.A.s as they are anticipated to accommodate significant new housing development over the long-term planning horizon.



Figure 5-1
City of Burlington
Strategic Growth Areas



Source: Dillon Consulting Limited, 2024.

Of course, over the planning horizon to 2051, some intensification may occur in other areas throughout the community, through the Gentle Intensification noted above and various forms of “missing middle” housing in existing communities.^[35] A relatively limited number of high-density units has also been allocated to the remaining greenfield supply in accordance with the expected housing demand by unit type in these areas. Otherwise, from a residential intensification perspective, most of the future growth is envisioned to occur in the S.G.A.s illustrated in Figure 5-1.

^[35] The “missing middle” refers to the range of housing types between traditional single detached houses and high-rise apartments that have gone “missing” from many large cities in Ontario. Missing middle housing is typically defined to include a range of house-scale buildings with multiple units – compatible in scale and form with detached single-family homes – located in a walkable neighbourhood.



5.3 Identification of Development Opportunities and Constraints

Within this overall structure and approach, the Consultant Team assessed intensification opportunities and constraints, making use of a range of data sources, including the land use permissions in applicable O.P. and zoning instruments, information on active development applications, Google Street View, other property information, and input and feedback provided by staff. The goal is to determine the total area of lands potentially available for redevelopment as a basis for estimating the potential housing, population, and employment yields that are set out in section 5.4, which follows.

5.3.1 Identification of Key Constraints

The first step to estimating overall intensification and redevelopment potential is to identify and initially “screen out” major development constraints, which are the properties not considered suitable or likely to be feasible for intensification to the plan horizon. Generally, properties that are not assumed for intensification from a land development perspective fall into the following categories:

1. **Environmental Protection Areas:** Natural heritage features designated for environmental protection, such as parks, open spaces, and natural habitats, are excluded to preserve ecological functions and public access to open space.
2. **Existing Development:** Properties with existing developments of three storeys or greater, or existing townhouses and other new developments that are unlikely to be redeveloped are excluded from consideration.
3. **Institutional Uses:** Lands occupied by active institutional uses such as hospitals, police stations, and performing arts centres were not considered suitable for intensification. This approach is considered conservative for the purposes of estimating intensification potential because there are portions of older occupied institutional (and commercial) parcels that could potentially redevelop over time. These parcels could include parts of large surface parking lots, unused yard or recreational spaces, or other surplus lands that may have theoretical potential for intensification but are very difficult to predict on a site-by-site basis so far into the future.

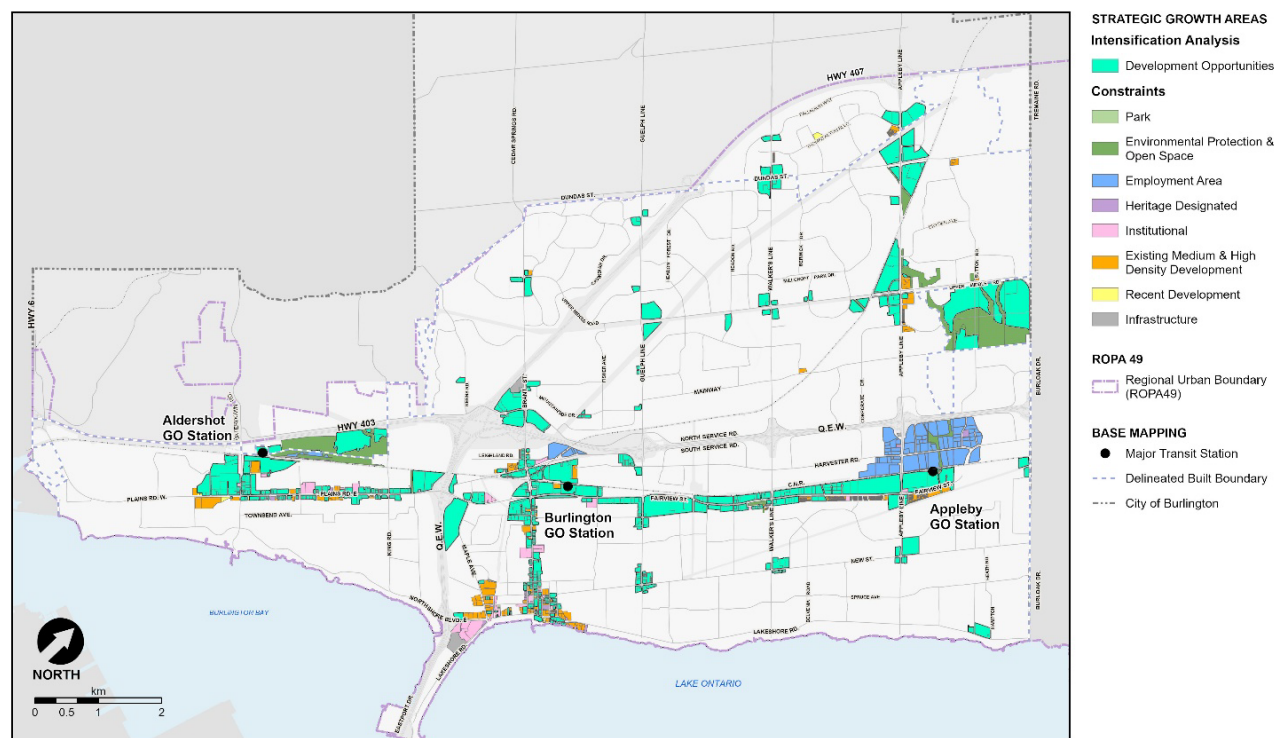


4. **Infrastructure:** Properties within infrastructure rights-of-way, such as roads and railway corridors, are not suitable for development and are excluded.
5. **Recent Redevelopment:** Properties that have undergone redevelopment within the past five years are excluded, as they are considered to have a remaining lifespan that would be beyond the plan horizon.
6. **Heritage Sites:** With the exception of active development applications, all properties identified by the City as heritage sites are excluded. There is only a small number of heritage sites across the City, concentrated largely in the Downtown and characterized by a finer-grained pattern of smaller lot sizes and development. A portion of these sites may redevelop over time; however, the timing and nature of redevelopment is also very difficult to predict.

Although not a constraint from a land development perspective, also screened out of the overall potential for residential intensification are properties located within the S.G.A.s but designated for continued employment use. In particular, this includes the lands designated for Urban Employment and General Employment in the Burlington GO (former U.G.C.) M.T.S.A. and the Appleby GO M.T.S.A. in Official Plan Amendment 2 (O.P.A. 2) to the O.P. for the Burlington Planning Area. These lands are not assumed for residential intensification but rather to continue in their current employment use to the plan horizon. The intensification potential opportunities and constraints are illustrated in Figure 5-2, below.



Figure 5-2
Residential Intensification Potential
Opportunities and Constraints



Source: Dillon Consulting Limited, 2024.

5.3.2 Identification of Properties with Redevelopment Potential

For the lands without constraints – from a site-specific and policy-based perspective – development potential and opportunities were identified through an analysis of specific sites and locational criteria to determine suitability to accommodate intensification. The properties included for potential redevelopment comprise:

1. **Active Development Applications:** units currently under construction or approved projects anticipated to begin construction soon.
2. **Approved Projects:** lands with approved projects not yet started but expected to contribute to future residential intensification in the short term.
3. **Vacant and Underutilized Parcels:** areas that offer opportunities for redevelopment due to their lack of current use or potential for higher-density development.



4. **Aging or Deteriorating Buildings:** buildings in poor condition that suggest potential for redevelopment or rehabilitation for residential use.
5. **Underutilized Retail Properties:** small plazas and malls with vacancies or excess parking suitable for conversion into mixed-use developments with residential units.
6. **Proximate Site Potential:** parcels adjacent to existing or planned intensification projects that, over time, would likely become more attractive for redevelopment due to precedent and proximate location.
7. **Long-Term Intensification Potential:** lands identified for potential future development that are likely to be more long term in nature based on factors such as location and the age of existing development.

5.3.3 City Review and Feedback

The preliminary results of the intensification analysis were reviewed with City staff through an iterative process of presentation and feedback, with the goal of reaching consensus on the overall conclusions. As such, the final results presented in this report incorporate review and feedback from City staff.

It is also important to clarify that the estimate of intensification potential does not provide a forecast of future demand. Demand for residential intensification is determined through the forecast of housing units by type over the period to 2051, along with the various City and Regional policy objectives directing significant growth and change to specific locations with the identified urban structure.

The overall supply potential for intensification, therefore, is not an input to the long-term forecast regarding housing demand over the 2051 planning horizon. Rather, the supply potential is an estimate prepared to verify that there are no material potential supply constraints to achieving the City's planned vision for these areas and, ultimately, to provide a broader context and framework for determining the appropriate density targets and other policy directions for S.G.A.s and other areas expected to be accommodated through intensification over time. As explained in section 5.4, which follows, there is a more than sufficient supply of residential intensification potential to accommodate forecast demand over the period to 2051.



5.4 Estimated Housing, Population, and Employment Yields

Based on the development opportunities previously discussed, the associated housing unit, population, and employment yields were estimated. The key steps in the analysis are outlined below and indicate that Burlington is very well positioned from a supply perspective – a total of over 106,000 housing units have been identified.

Notwithstanding the above, intensification can be a slow process with the combined requirements of site acquisition, financing, planning approvals, and multi-year construction periods affecting both the timing and location of units in the market. This variability makes it difficult to identify all the potential supply opportunities with accuracy and is especially challenging over an extended planning horizon to 2051.

5.4.1 *Higher-Density Housing Forms Expected*

For most urban intensification scenarios, the economics of redevelopment almost always lead to higher-density residential forms such as apartments and row house units and, in some cases, retail and commercial as part of larger mixed-use developments. That is to say, on a site-by-site basis in most large urban areas in Canada, the redevelopment of older central city parcels almost always takes the form of higher-density apartments with associated retail, because these are the uses that are required to achieve both the necessary amount and timing of financial returns to the developer to make projects financially feasible.

For this reason, the redevelopment of older urban areas for significant new industrial uses or the addition of significant new single detached units within the context of residential intensification projects is rare. On a related policy note, the potential financial returns (and hence incentives) from the developer's perspective to redevelop older urban parcels (often designated for industrial-type use) with residential mixed-use forms is one of the key factors driving the pressure for conversion of employment lands, because the return on investment is faster and high. The issue of employment land conversion has been addressed through the Region's recent Municipal Comprehensive Review and implemented through R.O.P.A. 49, notably the lands at 1200 King Road and Bronte Creek Meadows. No further employment land conversions have been incorporated into the intensification analysis, although this is an issue the City will continue to face in the years to come.



For the purposes of the analysis, a broad distribution of approximately 80% apartments and 20% row housing is anticipated across the S.G.A.s. This housing mix translates into an approximately 60%/40% distribution of land area, given that apartments are generally developed at higher densities than row house forms. The key unit mix and density inputs to the analysis are summarized in Figure 5-3 below.

Figure 5-3
Key Inputs to Estimate of Intensification Potential and Housing Unit Potential

Strategic Growth Areas	Unit Allocation (Apartments to Rows)	Density (Units Per Hectare): Apartments	Density (Units Per Hectare): Rows/ Ground
Primary Growth Area	80:20	500	50
Secondary Corridors	80:20	400	50
Secondary Mixed Use Commercial Centre	80:20	400	50
Secondary Local Centre	80:20	150	50
Secondary Neighbourhood Centre	80:20	150	50
Special Planning Area: 1200 King Road*	80:20	Concept	Concept
Special Planning Area: Bronte Creek Meadows*	40:60	400	70

Source: Dillon Consulting Limited, 2024. "Concept" for 1200 King Road refers to the current concept plan from which overall unit counts are based.

Minimal new single detached housing units are anticipated as part of the overall pattern of intensification, except for the Bronte Creek Meadows area, which is expected to build out with a pattern of apartment units along with a generally higher-density pattern of ground-related housing, including some detached units. Likewise, the unit estimates for 1200 King Road are prepared somewhat differently, based on the currently proposed development concept that, interestingly, is also distributed to roughly 80% apartments and 20% row housing with an additional 250,000 sq.ft. of non-residential space, which is incorporated into the overall City-wide estimates.



5.4.2 Density Factor Applied to Estimate Unit Yields

As shown in Figure 5-3 above, housing unit yields are estimated by applying a density factor to the expected amount and mix of housing within the intensification areas. The density of new apartment buildings is varied depending on location, with the highest density (500 units per hectare) assigned to the Primary Growth areas, with lower densities ranging from 150 to 400 units per hectare applied to areas without transit access and to reflect the local planning context and surrounding community character.

The density of urban row houses is maintained at a rate of 50 units per hectare for all areas, as the form of this type of row housing tends to be relatively consistent within urban intensification environments. This density reflects a typical urban street or “block” row house form consistent with new buildings being developed in many communities in southern Halton and Peel Regions, as well as the City of Hamilton and other comparable communities in the metropolitan area. Higher-density stacked or “back-to-back” row houses are included within the apartment density category in accordance with Census definitions. These particular row house forms can have much higher densities than traditional street or block row forms, in some cases approaching those of mid-rise apartment buildings.

5.4.3 Employment Generation

A high-level estimate of employment associated with the future development of higher-density residential space has been made, mainly in the form of ground-floor retail in new apartment buildings.

An average apartment unit size of approximately 100 sq.m is used to estimate overall residential space generation, which comprises a net area of 70 sq.m for the actual apartment unit plus 25 sq.m to account for the additional space required for common areas, loading, and elevators (where applicable). Ground-floor retail space is estimated at 10% of total gross residential space, consistent with the experience of other comparable communities, which is summarized in Figure 5-4 below.



Figure 5-4
Commercial Employment Density Assumptions

Overall Total	Floor Area, Sq.m
Commercial Allocation	0.1
Apartment Unit Size	100
Commercial sq.m Per Job	42

Source: Dillon Consulting Limited.

Again, the resulting estimates are not a forecast of commercial space but rather provided for high-level illustration purposes to ensure there are no significant supply constraints associated with future intensification. No specific estimates have been made in regard to the potential for major commercial or office developments within the S.G.A.s that would be in addition to any ground-floor retail space added over time.

As noted previously, however, certain policy-driven adjustments are required to properly reflect the targets and vision for the M.T.S.A.s set out in Burlington's O.P.A. 2 and take into account the employment to be accommodated on lands expected to carry on in their current employment designations. For the Burlington GO (former U.G.C.) M.T.S.A. and the Appleby GO M.T.S.A., in particular, these areas include lands designated as Urban Employment and General Employment that will continue as Employment Areas under the B.O.P. while there are no Employment Areas (Urban or General Employment precincts) in the Aldershot M.T.S.A., this area is expected to accommodate employment growth in the mixed use precincts. Accordingly, an upward adjustment to the total employment for each of these two areas is applied to achieve a 2051 total of:

- Approximately 19,600 jobs for the Appleby GO M.T.S.A.;
- Approximately 8,500 jobs in the Burlington GO M.T.S.A./U.G.C.; and
- Approximately 2,600 jobs for the Aldershot GO M.T.S.A.

For these areas, the existing employment levels were identified from the 2022 Halton Employment Survey. The employment estimated to be generated through mixed-use development (ground-floor retail) is added to existing employment levels and then the balance of employment is adjusted upwards to achieve the O.P.A. 2 employment targets. For the Appleby GO M.T.S.A., approximately 14,000 jobs were added to the designated Employment Areas north of the Q.E.W. in accordance with O.P.A. 2 policy



directions to encourage employment intensification. For the Burlington GO M.T.S.A./ U.G.C., roughly 4,500 jobs were added, which would be accommodated in future mixed-use developments and intensification of the designated Employment Area site to the north. For the Aldershot M.T.S.A., approximately 1,000 jobs were added as an area-wide adjustment to achieve the O.P.A. 2 policy targets

5.4.4 Population Estimates

Population is estimated through the application of persons per unit (P.P.U.) factors by unit type, adjusted upwards to account for the Census net under-coverage (the “undercount”) at a rate of approximately 4% based on Statistics Canada information. The average estimated P.P.U. per unit factor is 1.662 for apartments and 2.431 for row houses, which is applied to the estimated housing units within the identified intensification areas.

The resulting household population total is adjusted upwards by approximately 4% to estimate total population, including the undercount. The non-household population is not explicitly incorporated into the intensification estimate, as it is expected to be minimal and captured in the existing base of collective dwellings like nursing homes, seniors’ residences, and other dwellings of a communal nature.

5.4.5 Results

As shown below in Figure 5-5, the residential intensification analysis discussed herein results in an estimated total potential for over 106,000 units, which is more than sufficient to accommodate demand for approximately 24,400 housing units within the B.U.A., as discussed in Chapter 7.



Figure 5-5
City of Burlington
Intensification Analysis – Population, Housing, and Employment Potential

Housing Potential by Timing	Land Area, hectares	Apartment Housing Units	Row Housing Units	Total Housing Units	Total Population	Total Jobs
Short Term	189	46,443	5,111	51,554	89,253	11,503
Medium Term	125	14,170	4,020	18,189	32,755	9,083
Long Term	250	28,747	8,135	36,883	66,405	21,648
Total	563	89,361	17,265	106,626	188,413	42,233

Source: Dillon Consulting Limited, 2024. All figures are rounded.

It is important to reiterate that the estimate of intensification potential is not an input to the forecast of housing demand within the B.U.A., but rather a high-level “check” to verify that no significant supply limitations exist from a development perspective.

As noted previously, the amount of residential intensification that is planned to occur over the period to 2051 is set by the forecast of housing growth by type, within the context that Burlington is nearly built out, not by overall supply potential. In conjunction with this clarification, it is important to reiterate that while there is significant potential, not all residential development will be accommodated through intensification due to the need to plan for a full range and mix of housing options in other locations, such as Bronte Creek Meadows and the remaining greenfield areas.

The amount of potential intensification sites for most communities in the G.T.H.A. is typically very large. The amount of intensification that **actually occurs**, however, is driven by a range of other factors relating to, for example, a community’s overall attraction for investment within the broader marketplace; local conditions such as planning policy, existing or planned services (especially transportation), and the property owners (who must have an interest in redevelopment); and the physical characteristics of sites, which must allow for viable redevelopment. Site size, configuration, access, and the surrounding land uses must be able to support intensification and not impede economic viability. As a result, an ample supply of potential residential intensification is typically required for most communities comparable with the City of Burlington (as well as larger urban communities) in order to maximize the likelihood of success in capturing future intensification opportunities.



5.5 Potential for Gentle Densification

In addition to the potential supply of units in the S.G.A.s and other S.P.A.s, intensification is also expected, over time, within existing established neighbourhoods. Most of this intensification is expected to take place through a process of Gentle Densification, which, as noted previously, refers to the new units added to established residential areas, mainly in the form of A.R.U.s, either through renovation or the addition of new internal, attached, or detached accessory structures.

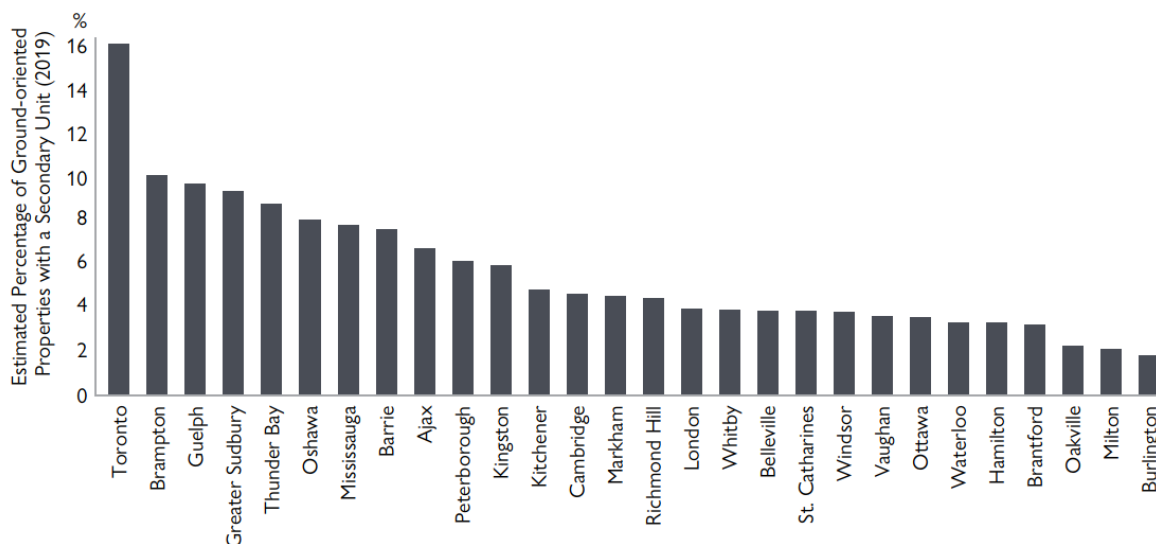
The potential for Gentle Densification is based on the amount of growth in these types of units that is expected to actually occur, rather than an estimate of total unit potential. While there is no question a large theoretical potential supply exists, the delivery of A.R.U.s to market occurs under a different dynamic (mainly that units must be created by private homeowners) and within a specific local context. Based on recent work prepared by CMHC, there is a significant variation in the provision rates of A.R.U.s across larger urban areas in Ontario, as illustrated below in Figure 5-6.^[36]

^[36] CMHC report: *Housing Market Insight Ontario, Secondary Units in Ontario*, June 2021.



Figure 5-6
Propensity to Accommodate Additional Residential Units
Across Major Urban Centres in Ontario

Figure 1: Secondary Units Most Prevalent in the City of Toronto



Source: CMHC calculations, MPAC

Based on the CMHC analysis, municipalities in southern Halton Region show among the lowest propensities to accommodate A.R.U.s, at approximately 2% of existing ground-related units. This compares to a high of 16% for the City of Toronto and rates in the 5% to 10% range for communities with much higher historical A.R.U. delivery rates (like the City of Brampton) or factors that drive a comparatively higher demand for A.R.U.s such as the presence of established universities (like the City of Guelph).

As explained in Chapter 7 and Appendix G, the City of Burlington is forecast to accommodate a total of approximately 61,500 ground-related units within the overall housing stock in 2051, including single detached and row house units. Based on this housing forecast and propensities to provide A.R.U.s noted above, the potential range of units could be generated through Gentle Densification is estimated. As summarized in Figure 5-7, below, between 4 and 100 units annually can be expected.



Figure 5-7
Potential for Gentle Densification to 2051

Range of Additional Residential Unit Propensity Potential Rates 2021-2051	Total Additional Residential Unit Growth	Basement Apartments	Other Additional Residential Unit Forms	Annual Total
Current City Rate (CMHC) 1.75%	120	50	70	4
Mid-Range Comparable 7%	3,160	1,360	1,800	105
City of Toronto High-End 15%	7,740	3,330	4,420	260

Source: Dillon Consulting Limited, 2024, based on the 2021 Census, forecast of housing by type from Chapter 7 and Housing Market Insight Ontario, Secondary Units in Ontario, Canada Mortgage and Housing Corporation (CMHC), June 2021.

Explanatory Notes: Total A.R.U. growth is based on an estimated 2021 base of approximately 875 units estimated from the current CMHC rate (1.75%) and 2021 Census total ground-related units (50,100 units) compared to the total 2051 ground-related units at the range of rates shown in the table. The distribution between basement apartments and other A.R.U. forms (other Interior Multi-Plex based units and attached or detached A.R.U. such as laneway houses maintains the base 2021 distribution shown in the CMHC analysis. Annual total unit production is for the 30-year period from 2001 to 2051 (total A.R.U. growth divided by 30).

In our view, the City of Burlington is unlikely to achieve the very high City of Toronto A.R.U. rate of 15% given its location context. We would anticipate, however, that the overall propensity to provide A.R.U.s will rise over time, as a result of the City's continued efforts to promote this type of intensification over time. As a result, a range in the order of very few (less than 10) to approximately 100 units per year is considered reasonable for land use planning purposes.



In regard to the anticipated distribution within the City, the recent CMHC report provides some helpful context. Two of the key findings most relevant to the outlook for Gentle Density in the City of Burlington are that:

- A.R.U.s are more prevalent in older established areas of the community, especially in close proximity to the Downtown core and other areas with transit and evolving urban amenities such as the M.T.S.A.s; and
- Municipalities with newer homes (built largely after 2010) have a lower prevalence of A.R.U.s, which is due, in part, to their pattern of dispersed essential amenities that require car travel and that, historically, has been somewhat less appealing to renters.

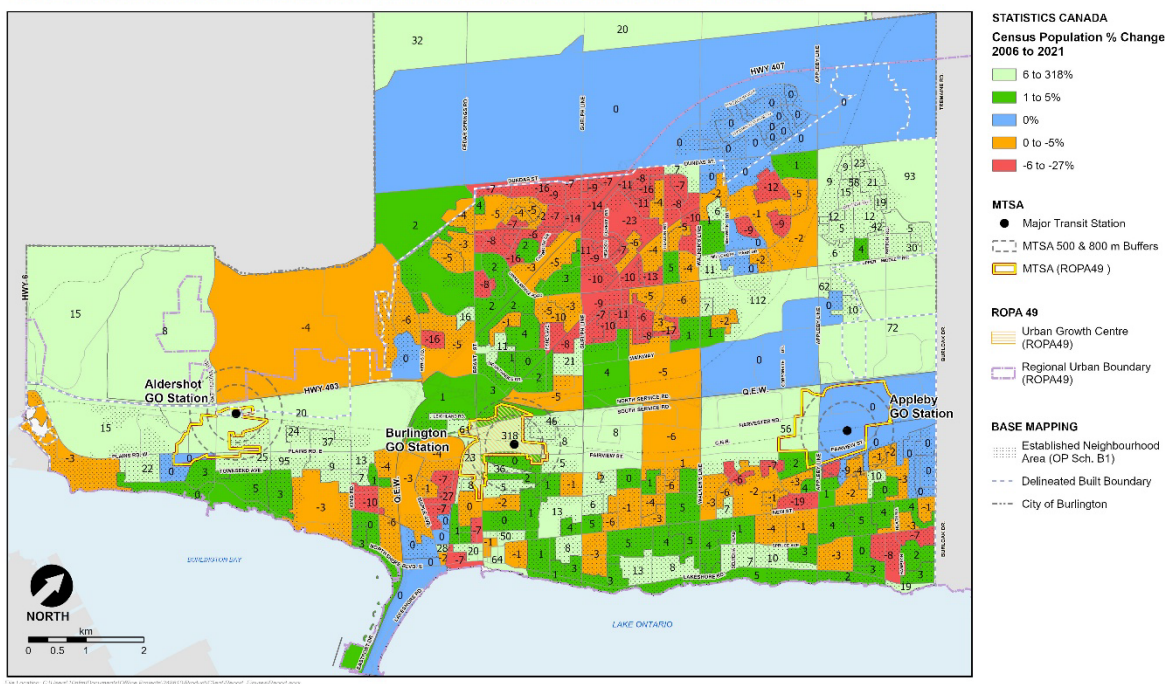
Although the CMHC report does not address the growth outlook for A.R.U.s specifically, the findings suggest that future development is likely to be focused within older established residential areas within the central urban area as opposed to within new greenfield areas. This finding echoes the results of other analyses of A.R.U.s and Gentle Density, including the City of Vancouver, that generally indicate that a key attraction of A.R.U.s (especially Laneway Houses) is the option to live in a newer housing unit close to jobs, transit, and other nearby urban amenities.^[37]

From a development perspective, many of the most attractive locations for detached A.R.U.s are the larger parcels in older neighbourhoods, where incomes and market rents are higher, in proximity to the Downtown core or similar urban-type amenities. For the City of Burlington, these types of parcels are located south of the Queen Elizabeth Way (Q.E.W.) and along the waterfront, primarily. These are also among the neighbourhoods in the community where population has been either stable or declining over the last 20 years, as illustrated by Figure 5-8 below.

^[37] Based on the findings of the City of Vancouver Laneway Housing Survey Summary (2018) prepared as part of the Housing Vancouver Strategy 2018-2027 and 3-Year Action Plan 2018-2020.



Figure 5-8
City of Burlington
Population Change 2006 to 2021 Within Established Neighbourhoods



Source: Dillon Consulting Limited, 2024.

Gentle Densification will play an important role in accommodating the City's housing needs to 2051. There are many well-documented benefits, especially as part of the missing middle housing market and potential to address affordability challenges. To date, however, the experience has been that most of these units are occupied by younger single and two-person households rather than families with children, meaning they function as a more attractive rental option for residents seeking amenity-rich central urban neighbourhoods rather than as a substitute for other housing forms. New A.R.U.s (in any form) also tend to be very expensive for private homeowners to build and maintain, which historically has been the key factor limiting the overall amount of such units that are delivered to market.

Most of the demand for intensification to the plan horizon will be accommodated within the S.G.A.s, in particular the M.T.S.A.s and other priority areas. There is more than sufficient supply potential to accommodate demand in these locations.



Chapter 6

City of Burlington's Housing Market Assessment



6. City of Burlington's Housing Market Assessment

To help inform the broader growth analysis presented herein, an expanded housing market analysis was undertaken to help inform the current and forecast housing needs component, focusing on a more detailed assessment of local demand and supply considerations.

This analysis builds on and updates the City's 2021 Housing Needs and Opportunities Report (Housing Strategy).^[38] The assessment considers economic and demographic trends, as well as regional and local real-estate development trends that are influencing housing tendencies in Burlington. This analysis will help inform the definition of market demand and assess the various other supply and policy-based factors that are likely to impact local housing needs over the next decade in the City.

6.1 Provincial Housing Context

Ontario's housing market is facing two major interconnected challenges: a lack of market choice and erosion in affordability. While municipalities are on the frontline in facing these challenges, the current state of housing is largely an outcome of a broader range of factors that have influenced the market over the past decade.

Provincial policy direction is increasingly focused on housing market choice and expanding housing supply across Ontario. The new P.P.S., 2024 is intended to simplify and integrate existing provincial policies while providing municipalities and the Province with greater flexibility to deliver on housing objectives and unlock housing opportunities at the local level.

In the past few years, the Province introduced a number of bills aimed at increasing housing supply and attainable housing options. This includes the *More Homes Built Faster Act* (Bill 23) which targets the creation of 1.5 million homes over the next 10 years. To implement this, the Act introduced a number of changes that seek to increase the supply of housing. This included assigning municipal housing targets to identify the number of new housing units needed by 2031, which impacts Ontario's largest and fastest growing single/lower-tier municipalities, including the City of Burlington.

^[38] City of Burlington Housing Needs and Opportunities Report, November 23, 2021.



This goal to construct 1.5 million new homes over the next decade is a notable challenge. To meet this target, Ontario-wide housing development activity will need to increase by about 50% to achieve this provincial target over the next decade. While the municipal housing targets are intended to provide guidance to impacted municipalities in achieving this goal, the high-level nature of the housing targets, which lack detail regarding housing form, tenure, or affordability, make their application challenging for municipalities. Reconciling the Province's housing targets with approved forecasts and local planning initiatives to enable/support housing supply growth requires more rigorous assessments that embrace the local context, as presented herein.

6.2 Local Housing Context

Over the past decade, Burlington has experienced moderate population and housing growth. As previously discussed, average home prices and rental rates in Burlington have also increased, which has eroded housing affordability across the housing continuum in the City. Providing a broad market choice in housing and housing affordability is an increasingly important consideration.

To maintain a well-balanced, strong community and ensure long-term sustainability, it is vital that Burlington offers a wide selection of housing options across a broad range of income groups. Housing affordability is a key component of quality of place and is directly linked to population and economic growth potential and municipal competitiveness. The availability of housing is a key factor in attracting and retaining people and businesses to a community. In an increasingly knowledge-based environment, the ability to cultivate, retain, and attract talented workers is increasingly important. Attracting and retaining people of working age and their families, which is necessary to support a broad range of employment opportunities, requires a diverse housing stock.

As Burlington continues to grow and mature, demands for new housing products within the City are anticipated. Looking forward, increasing cultural diversity, an aging Baby Boom population, growing demands from new families, and eroding housing affordability will require that the City continues to promote and support a broad range of new housing products by location, type, built-form, density, and price/affordability.

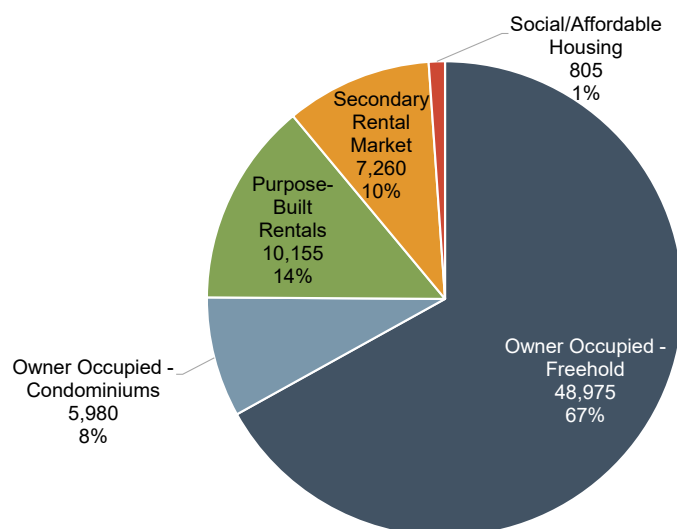


6.3 Housing Continuum

The City of Burlington has a large and diverse housing base comprising a range of housing typologies. Burlington's housing continuum is presented below in Figure 6-1. While the City's range of market housing has been diverse, there is a limited share of non-market housing. Approximately 99% of the City's total housing is market housing, compared to approximately 1% that is publicly funded or provided by non-profit agencies.

As shown in Figure 6-1, the City's housing base largely consists of owner-occupied households (75%), primary rental households (i.e., purpose-built rentals) (14%), and secondary rental households (10%), followed by social or affordable housing (1%).

Figure 6-1
City of Burlington
Market and Non-Market Housing Continuum



Note: Numbers may not add precisely due to rounding.

Source: Derived from Statistics Canada 2021 Census Profile data, CMHC Rental Market data, Statistics Canada 2021 Census data, and Statistics Canada Table 46-10-0070-01 by Watson & Associates Economists Ltd., 2024.

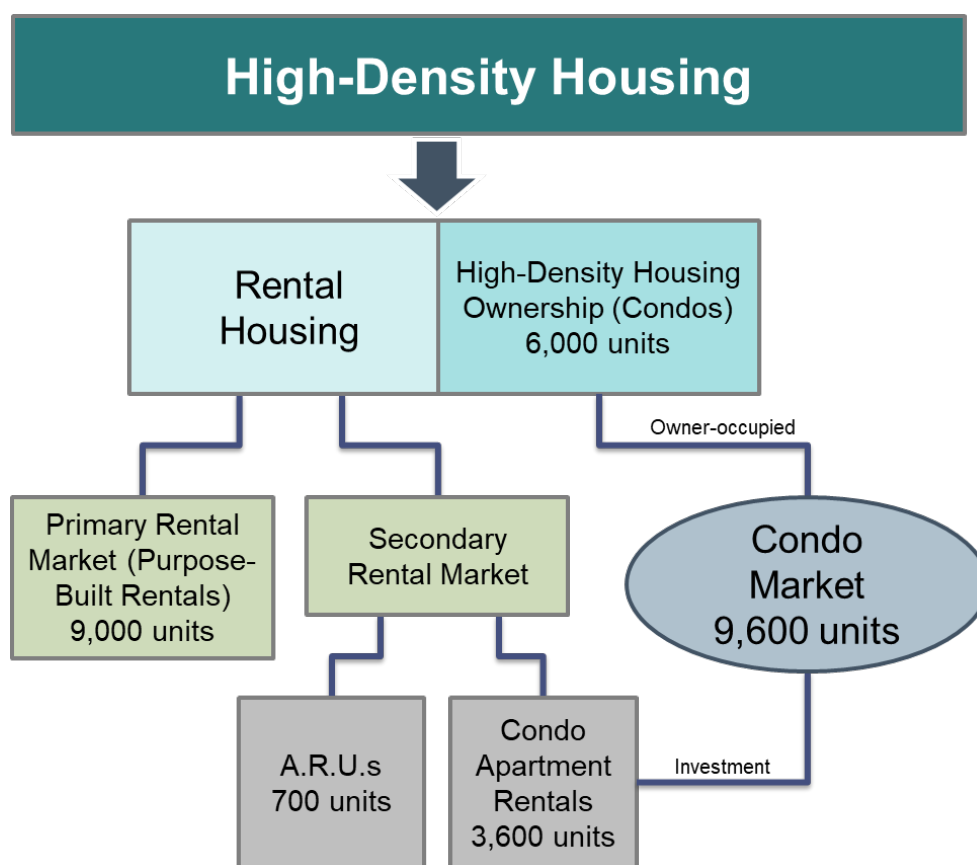
Of Burlington's total housing base of 73,200 units, about one-fifth is high-density market housing. As presented in Figure 6-2, this includes:

- Burlington's condominium market – 9,600 units



- 62% (6,000) owner occupied
- 38% (3,600) renter occupied in the secondary market);
- The City's primary rental market – 9,000 apartments; and
- A.R.U.s – 700 units (1.7% of grade-related units).

Figure 6-2
City of Burlington
Housing Base – High-Density Housing Breakdown



Source: Derived from Statistics Canada Table: 46-10-0070-01, and CMHC *Housing Market Insight: Secondary Units in Ontario*, June 2021, and CMHC Rental Market data, by Watson & Associates Economists Ltd., 2024.

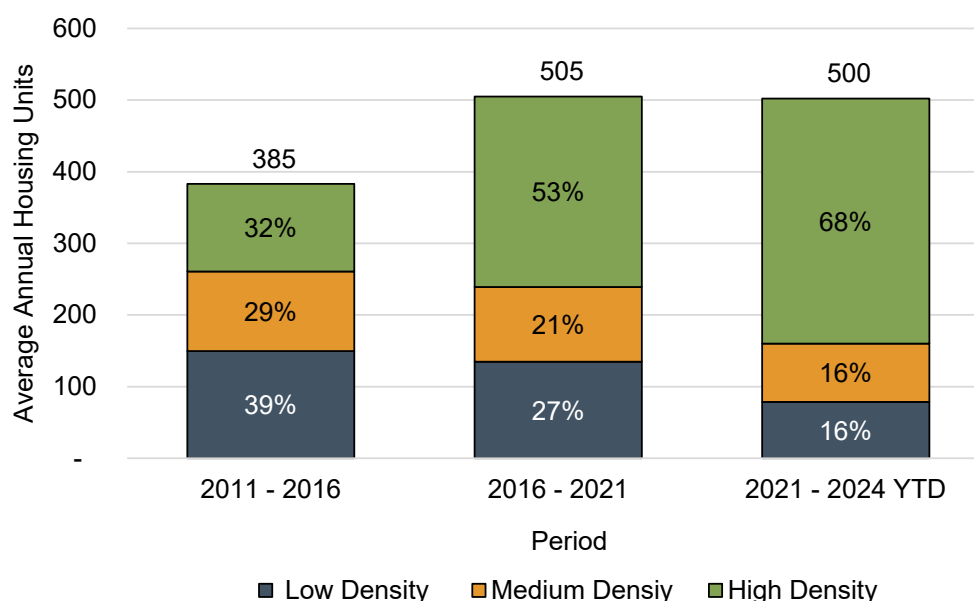


6.4 Shift in Housing to Higher-Density Development

Building on the historical housing analysis provided in chapter 4, Figure 6-3 summarizes the number of residential building permits issued by unit type for new construction from 2011 to 2024 in the City of Burlington.^[39] Key findings include the following:

- Over the 2011 to 2024 period, Burlington averaged approximately 460 residential units constructed per year.
- During this time period, housing density trends have steadily shifted from low-density housing to higher-density development, with high-density units accounting for 68% of total residential development activity over the 2021 to 2024 period in Burlington.

Figure 6-3
City of Burlington
Five-Year Incremental Housing Growth by Density Type, 2011 to 2024



^[1] Low Density captures single and semi-detached units.

^[2] Medium Density captures townhouses and apartments in duplexes.

^[3] High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.

Source: City of Burlington building permit data (2011 to May 2024), derived by Watson & Associates Economists Ltd., 2024.

^[39] Building permit figures do not account for demolitions.



As presented in Figure 6-4, the City of Burlington currently has approximately 44,800 housing units in the development approvals process. Of this total, 42,200 (94%) are high-density housing supply. This includes 4,250 units (10%) with planning approval, 8,880 units (20%) under review, 5,140 units (12%) pending, and 22,840 units (53%) in the pre-application phase.

Figure 6-4
City of Burlington
Active Residential Development Application Data

Status	Low Density	Medium Density	High Density	Total
Planning Approval	560	411	4,254	5,225
Under Review	0	200	8,579	8,779
Waiting for Site Plan Application	0	72	5,066	5,138
Appealed to the Ontario Land Tribunal	914	0	1,897	2,811
Pre-Application	12	413	22,411	22,836
Total Unit	1,486	1,096	42,207	44,789

Source: Derived from City of Burlington data by Watson & Associates Economists Ltd., 2024.

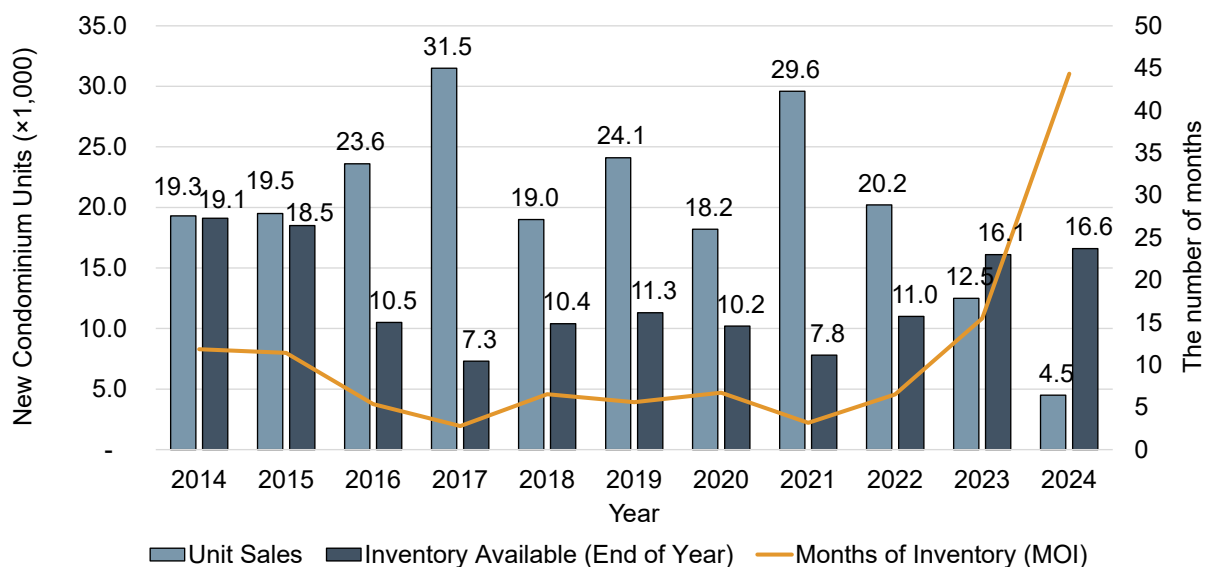
6.4.1 Condominium Market

Over the past decade, the Greater Toronto Area (G.T.A.) condominium market has seen significant development and sales activity, as illustrated in Figure 6-5. While the G.T.A. condominium market is currently experiencing headwinds, with new unit sales in 2024 at lows not seen since the mid-1990s and unsold units at record highs, the long-term prospects remain favourable. The condo sales market is expected to strengthen through 2025, driven by lower interest rates and pent-up demand.^[40]

^[40] TD Economics, September 2024. Oversupplied GTA Condo Market a Headwind for Home Prices.



Figure 6-5
The Greater Toronto Area New Condominium Market



Source: Driven from Altus Data Studio by Watson & Associates Economists Ltd., 2025.

Similar market trends have been observed in the local Burlington condominium market. Burlington has experienced significant growth in the condominium development market over the past decade. Between 2014 and 2023, Burlington's condominium housing base expanded by approximately 2,830 units, representing an average annual development activity of 283 units.^[41] Burlington's condominium supply is estimated to total 9,630 units in 2021. Of these, 62% are owner-occupied while 38% are rented out by owners.^[42]

Currently, Burlington has approximately 1,600 and 410 condominium units under construction and in pre-construction, respectively.^[43]

Recent condominium development projects have largely comprised mid- to high-rise buildings, ranging between 150 and 400 units per building. The scale of condominium projects is gradually increasing, with average building sizes (with respect to number of units) expanding; however, average unit sizes are declining. Over the past five years,

^[41] CMHC Housing Starts.

^[42] Statistics Canada Table 46-10-0070-01 Investment status of residential properties.

^[43] Altus Data Studio.



average condominium unit sizes in new units have averaged approximately 720 sq.ft.^[44] Of the units currently under construction or in pre-construction, 32% are one-bedroom, 27% are one-bedroom plus den, 33% are two-bedroom, 6% are two-bedroom plus den, and 2% are three-bedroom plus den units.

Based on Figure 6-6 below, over the next four years, approximately 2,950 units are expected to be occupancy ready.

Figure 6-6
City of Burlington
Condominium Projects by Construction Status

Condominium Project Status	Total Units	Units Sold
Under Construction	1,601	551
Pre-Construction	414	-
Coming Soon	939	Not Applicable
Total	2,954	551

Source: Derived from Altus Data Studio by Watson & Associates Economists Ltd., 2024.

6.4.2 Rental Housing Market

The inventory of rental housing options in the City of Burlington is moderately diverse and is represented by a spectrum of different building typologies, dwelling unit sizes, and geographic locations. The rental market for various dwelling options is structured similarly to that of other communities in Canada, as Burlington's rental market is characterized by both a primary and secondary market, described below:

- **Primary rental market** – CMHC identifies the primary rental market as structures that have at least three rental units. These properties are typically operated by an owner, manager, or building superintendent.
- **Secondary rental market** – CMHC identifies rented condominiums, subsidized rental housing, and rentals in structures of less than three units as part of the secondary rental market. In fact, all rentals – except privately initiated, purpose-

^[44] Altus Data Studio.



built rental structures of three units or more – are included in the secondary rental market.

As of 2021, the rental market supply for both primary and secondary units within the City of Burlington is approximately 18,220 dwellings. This amount includes the approximately 10,160 units (56%) within the primary rental market, in addition to the approximately 8,070 rental units (44%) also found within the secondary market housing categories.^[45]

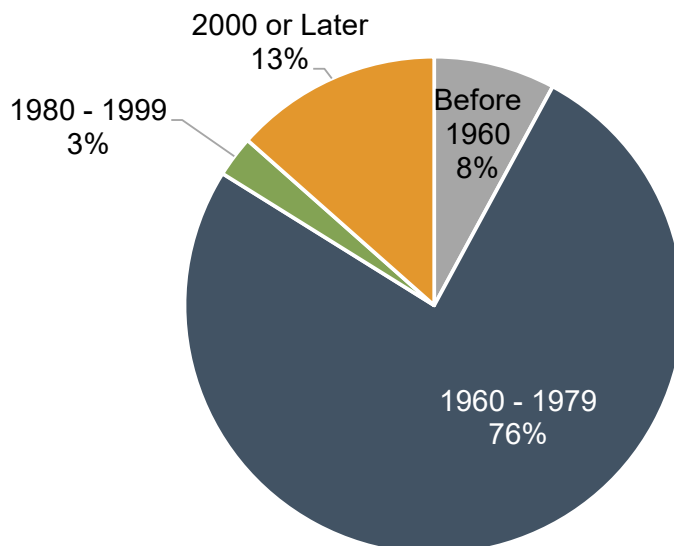
6.4.2.1 Purpose-Built Rental Market

As noted above, the City of Burlington's purpose-built rental market (primary rental market) totals 10,160 units and comprises 89% apartments and 11% row houses. The City's existing purpose-built rental inventory primarily consists of units constructed during the 1960s and 1970s, accounting for 76% of the total stock. In addition, 8% of the rental units were built before 1960. A smaller portion, around 3%, was constructed between 1980 and 1999, and 13% of the inventory has been built since 2000, as shown in Figure 6-.

^[45] Statistics Canada Census, 2021, and CMHC rental market data.



Figure 6-7
City of Burlington
Purpose-Built Rental Housing Inventory by Year of Construction



Source: Derived from CMHC Rental Market Survey by Watson & Associates Economists Ltd., 2024.

Over the past decade (2014 to 2023), purpose-built rental development activity in Burlington has totalled approximately 150 units.^[46]

Figure 6- provides a summary of average rental vacancy rates for one-, two- and three-bedroom apartments in the primary rental market over the past decade. Key observations include the following:

- As of October 2023, the overall vacancy rate is 1.6% in Burlington, slightly below the provincial average of 1.7%, indicative of a tight rental market (note that a healthy rental vacancy rate is generally considered to be 3%).^[47]
- Since 2018, Burlington's vacancy rate has been above the 10-year average (1.5%), except after the peak of the COVID-19 pandemic in 2021 and 2022 when it was 1.2%.

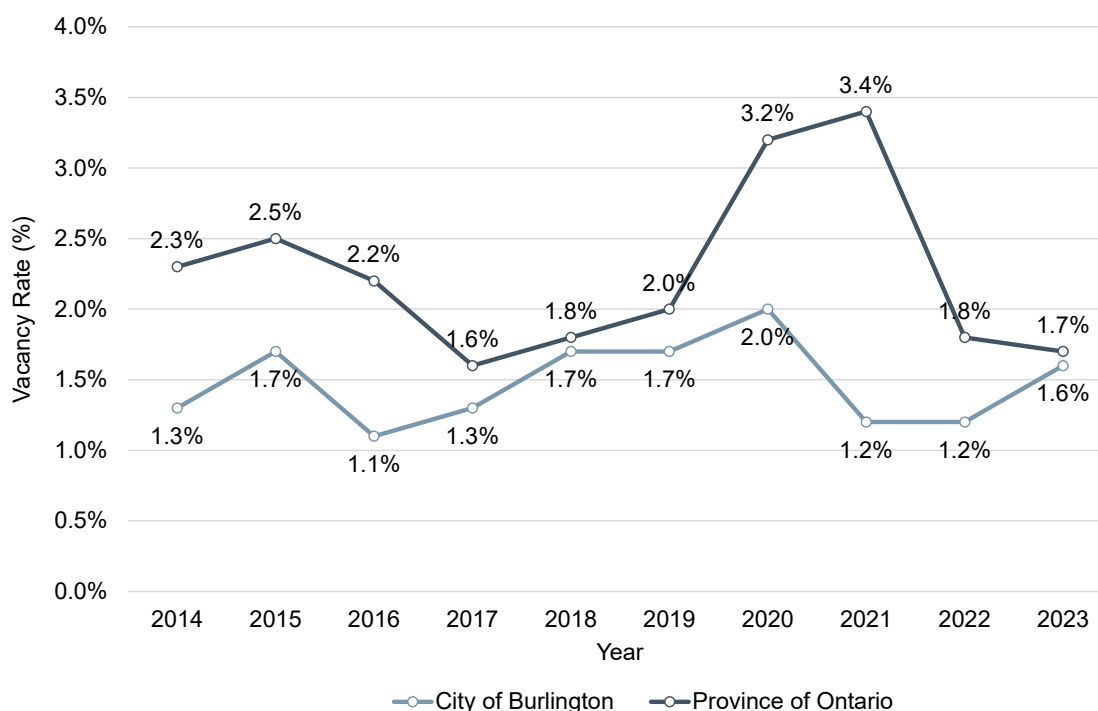
^[46] CMHC Starts and Completions Survey.

^[47] CMHC, 2023.



- Over the past decade, the City's vacancy rate has generally been lower than the provincial average (10-year average of 1.5% vs. 2.3%).

Figure 6-8
City of Burlington
Historical Vacancy Rates, 2014 to 2023



Source: Derived from CMHC Housing Market by Watson & Associates Economists Ltd., 2024.

Typically, a rental vacancy rate of approximately 3% is considered healthy. It is noted that low average rental vacancy rates currently experienced in Burlington and more broadly across the Province continues to place an upward price pressure on rents.

6.4.2.2 Secondary Rental Market

Burlington's secondary rental market is growing and largely comprises condominium apartment rentals, A.R.U.s (secondary units) and grade-related housing that is rented out by owners, as presented in Figure 6-. As shown, condominium units in the City that are rented out by owners total 3,650 units, representing about 38% of the total



condominium units in Burlington. Vacancy rates for condominium apartments in Burlington is low, at 1.6%.^[48]

A.R.U.s in grade-related housing, total approximately 730 units. Secondary units are present in about 1.7% of grade-related housing in Burlington.^[49] Recently (i.e., 2021 to 2023), A.R.U. construction in Burlington has averaged approximately 13 units per year.^[50] Other grade-oriented housing (singles/semis and townhouses) are also rented out in the secondary market, totalling approximately 3,610 units.

Figure 6-9
City of Burlington
Secondary Rental Market, 2021

Secondary Rental Market	Units
Condominium Rental Apartments	3,650
Other (single/semis and townhouses)	3,610
Additional Residential Units	730

Note: Numbers have been rounded.

Source: Derived from Statistics Canada Census Data, CMHC Rental Market Survey, CMHC 2021 Housing Market Insight, and Statistics Canada Table 46-10-0070-01 by Watson & Associates Economists Ltd., 2024.

6.4.3 Short-Term Rental Market

Burlington had 73,180 occupied dwelling units in 2021. Of these, approximately 0.5% (or 346 units) were classified as short-term rental properties, which are typically used for temporary stays through platforms like Airbnb or VRBO. Additionally, 67 units were identified as potential long-term dwellings.^[51] While these units serve the tourism and

^[48] CMHC Rental Market Survey, October 2023 – Hamilton C.M.A. Rental Condominium Apartments, Vacancy Rate (%).

^[49] CMHC 2021 Housing Market Insight – Secondary Units in Ontario, June 2021.

^[50] Derived from City of Burlington building permit data by Watson & Associates Economists Ltd.

^[51] Short-term rentals are available for rent via online platforms (e.g., Airbnb) in short-term intervals, usually ranging from 1 to 28 days. Potential long-term dwellings comprise units listed for more than 180 days a year, excluding vacation-type properties. Source: Statistics Canada Brief Analysis: *Short-term rentals in the Canadian housing market*.



temporary accommodation market, they reduce the availability of housing for local residents.

6.4.4 Observations

- The purpose-built rental market has experienced limited supply growth over the past decade – 165 new units built over the period.
- Recent growth in Burlington's rental market supply has been largely in the secondary market through condominium apartment rentals.
- It is important to have balanced growth in the rental market supply – the primary rental market provides greater housing security for tenants and greater municipal supply certainty.
- Average rents in the secondary market are also generally higher than in the primary rental market.

6.5 Burlington's Housing Pledge

The Province of Ontario has assigned municipal housing targets to identify the number of new housing units needed by 2031, which impacts Ontario's largest and fastest growing single/lower-tier municipalities in Ontario. On February 21, 2023, Council approved the City's Housing Pledge.

As previously noted in chapter 2, it is important to emphasize that perceived housing demand established through Bill 23 does not represent a prescribed forecast that municipalities must strive to achieve. Rather, Bill 23 establishes housing targets that represent a desired state, expressed as a policy objective.

For Burlington, the Province's overall target is 29,000 new units by 2031; however, the City has struggled to meet its yearly targets so far. In 2023, the provincial target for Burlington was 2,127 new housing units, but only 584 were started, achieving about 27% of the goal. Similarly, for 2024, the target was set at 2,417 units, and as of August only 553 units have been started.^[52] This consistent shortfall indicates the significant challenges in increasing housing supply, despite the policy objectives set by Bill 23.

^[52] CMHC Starts, Completions and Under Construction by Census Subdivisions, August 2024.



6.6 Burlington's Current Housing Needs

6.6.1 Core Housing Need

Figure 6- illustrates the households in core housing need by tenure (owner, renter) and renter households that are subsidized and not subsidized. In accordance with CMHC's definition, a household is considered to be in core housing need if it meets two criteria:

- A household is **below one or more** of the adequacy (repair), suitability (crowding), and affordability standards.
- The household would have to spend 30% or more of its before-tax household income to access local market housing that meets all three standards.

The households in core housing need in Burlington total 5,645 dwelling units as of 2021. This includes approximately 3,445 (61%) renter households and 2,205 (39%) owner households. Of the renter households in core housing need, 82% are not subsidized and 18% are subsidized households, as shown in Figure 6-.

Figure 6-10
City of Burlington
Households in Core Housing Need

Housing Need Standards	Owner Households	Renter Households (Subsidized)	Renter Households (Market)	Total Owner and Rental Households
Below adequacy threshold only	65	85	-	150
Below suitability threshold only	-	35	30	75
Below affordability threshold only	1,965	465	2,365	4,790
Below affordability and suitability thresholds	30	-	190	215
Below affordability and adequacy thresholds	135	45	210	395
Below suitability and adequacy thresholds	-	-	-	15
Below all three thresholds	-	-	-	-
Total Households in Core Need	2,205	635	2,810	5,645

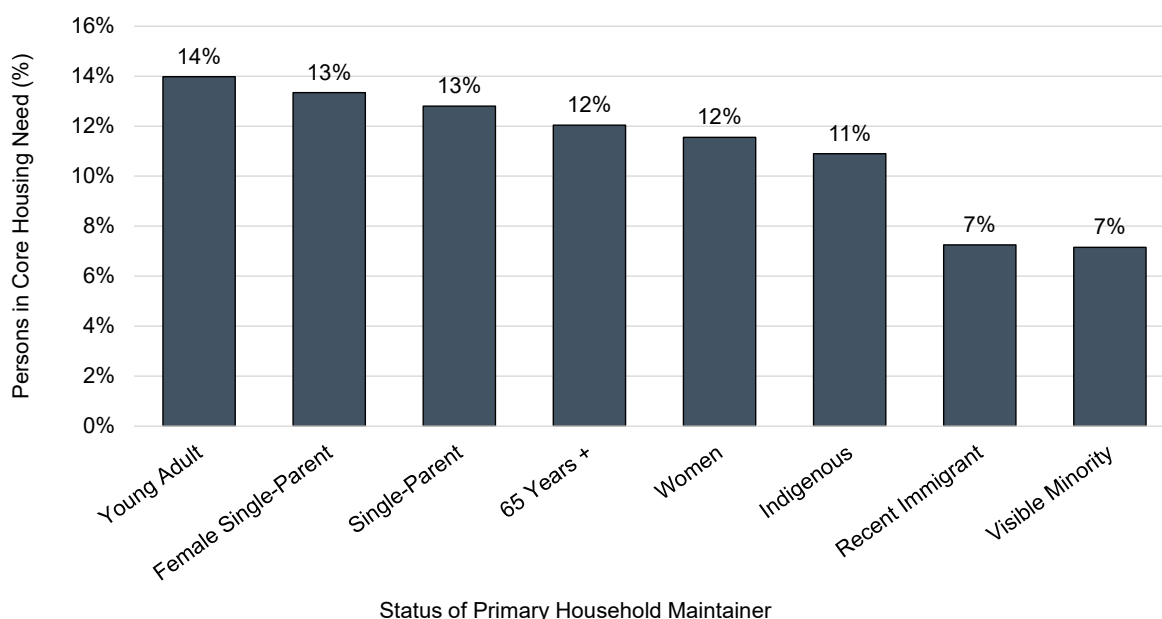
Note: Numbers may not add precisely due to rounding.

Source: Derived from Statistics Canada, Table 98-10-0247-01, by Watson & Associates Economists Ltd., 2024.



Figure 6-11 illustrates percentages of households in core housing need by priority population in the City of Burlington. As shown, in 2021, approximately 14% of households maintained by young adults were in core housing need, along with 13% of households maintained by female single parents, 13% by single parents overall, 12% by individuals aged 65 and over, 12% by women, 11% by Indigenous people, 7% by recent immigrants (arriving between 2016 and 2021), and 7% by visible minorities.

Figure 6-11
City of Burlington
Key Characteristics of Population in Core Housing Need, 2021



Source: Derived from Statistics Canada, Census of Population, 2021 by Watson & Associates Economists Ltd., 2024.

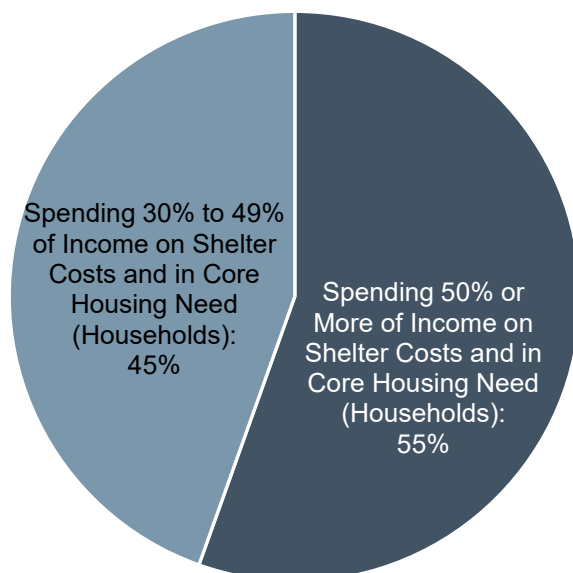
Figure 6-12 summarizes the City's total households in severe core housing need. A household is considered to be in severe core housing need if it meets two criteria:

- A household is **below one or more** of the adequacy (repair), suitability (crowding), and affordability standards.
- The household would have to spend 50% or more of its before-tax household income to access local market housing that meets all three standards.

As shown in Figure 6-, 3,000 households are in severe core housing need in Burlington, representing 55% of the City's total households in core housing need.



Figure 6-12
City of Burlington
Households in Severe Core Housing Need



Note: Numbers may not add precisely due to rounding.

Source: Derived from Statistics Canada, Table 98-10-0247-01, by Watson & Associates Economists Ltd., 2024.

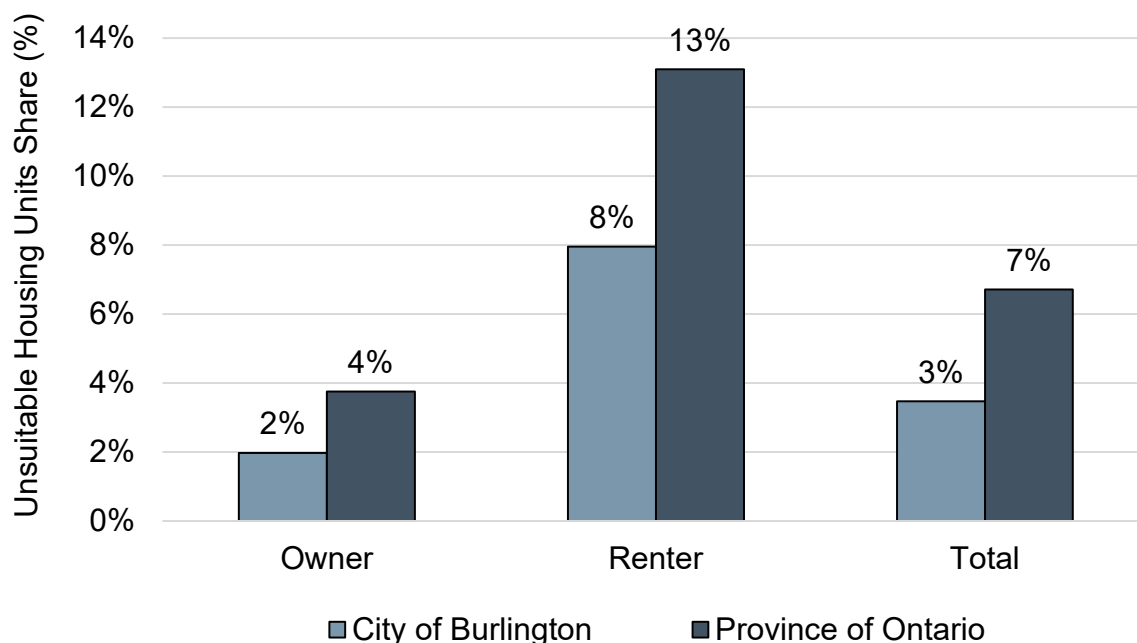
From a housing affordability needs perspective, the severe core housing needs identified above are largely concentrated in lower-income renter households.

6.6.2 *Housing Suitability*

The indicator for housing suitability (a topic often referred to as crowding) is measured by the number of bedrooms within the dwelling related to the size and composition of the household. Within Burlington, 3% (2,540 units) of occupied housing is not considered suitable for occupants from a space needs perspective. The percentage share of dwellings not considered suitable in Burlington is considerably lower than the Ontario average (7%), as shown in Figure 6-. Burlington's unsuitable housing share has remained largely unchanged since 2006, when it was 3%.



Figure 6-13
City of Burlington and Ontario
Housing Suitability, 2021



Source: Derived from Statistics Canada, Table 98-10-0247-01, by Watson & Associates Economists Ltd., 2024.

6.6.3 *Burlington's Current Housing Needs*

The analysis presented above strongly suggests that Burlington has a structural deficit in housing supply that does not meet the needs of the current population from a household affordability and market choice lens. Based on the current housing needs analysis presented above, a summary of the current housing needs in Burlington is presented in Figure 6-. This includes approximately 3,500 non-market housing units estimated to be required to address the existing structural deficit. Addressing this deficit in non-market housing should be considered a high priority for the short and medium term.

To provide better balance and market choice, the City needs to continue promoting supply expansion and improving the condition of both rental and ownership market housing, to better align with broader core housing needs, enhance housing suitability, and alleviate the low vacancy rates in Burlington. At a minimum, the City should



continue to promote the expansion of attainable purpose-built rentals and secondary rental market units, recognizing a need for approximately 300 rental housing units in total to bring Burlington's rental housing market into a better market balance.^[53]

Figure 6-14
City of Burlington
Current Housing Needs

Existing Housing Need	Housing Units
Structural Deficit	3,500
Expanded Market Choice in Purpose-Built Rental Housing to Achieve 3% Vacancy Rate	300
Existing Housing Need	3,800

Source: Watson & Associates Economists Ltd., 2024.

Addressing the City's current housing needs by developing planning initiatives to achieve higher housing targets could serve as an effective approach to providing additional housing choice to low- and moderate-income households in Burlington with a focus on non-market rental housing. Critical to the success of these initiatives is the alignment of new housing products with local housing demand, in accordance with affordability and household type. Having said that, expanding the housing supply accordingly in Burlington over the short to medium term is recognized as ambitious.

6.7 Ten-Year Future Housing Needs

Based on the growth forecast presented in Chapter 7, the following provides an assessment of Burlington's forecast housing needs over a 10-year (i.e., 2024 to 2034) time horizon. This analysis is informed by historical local housing propensity rates (i.e., housing preferences) and anticipated housing growth by age cohort, household formation patterns, and anticipated trends in household income.

There are a number of key factors that are expected to influence the residential real-estate market and housing affordability needs within Burlington over the coming decade. These factors include demographic trends, household income, housing

^[53] The City of Burlington requires approximately 300 rental housing units to increase the rental vacancy rate to 3.0% which is considered to be a healthy rental vacancy rate.

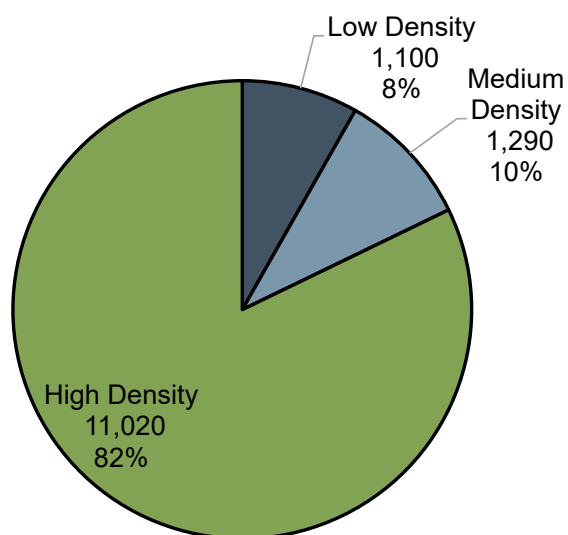


affordability, and supply opportunities. This 10-year housing forecast has been modelled by age group (i.e., age of primary household maintainer) to assess anticipated future housing needs by tenure (i.e., rental and home ownership).

6.7.1 Housing Forecast

Burlington is expected to accommodate 13,410 units of housing growth over the 2024 to 2034 period. As illustrated in Figure 6-, new permanent housing is forecast to comprise 82% high-density (apartments), 10% medium-density (townhouses), and 8% low-density (singles and semi-detached) units. A steady increase in the share of medium- and high-density housing forms is anticipated, largely driven by the housing needs associated with the 65+ age group. In comparison to younger age groups, a proportionally greater share of the 65+ age group prefers high-density developments options. High-density housing options that are particularly well-suited to meet these needs are those that provide convenient access to health care, transit, amenities and social opportunities, while supporting the built and livable environments essential for older adults.

Figure 6-15
City of Burlington
Future Housing Needs, 2024 to 2034



Source: Watson & Associates Economists Ltd., 2024.

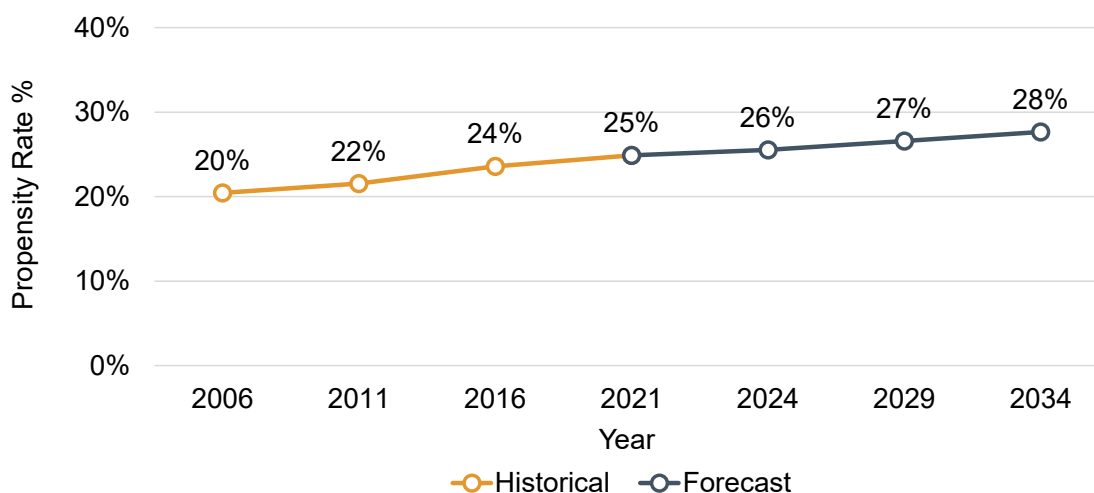


6.7.2 Forecast Housing Needs by Tenure, 2024 to 2034

Burlington is expected to add around 13,400 permanent households by 2034, which will require a mix of different housing types and ownership options. This housing forecast analysis looks at what types of housing and tenure (owning versus renting) will be needed.

As the population ages and homeownership becomes less affordable, the demand for rental housing is expected to rise. Figure 6-16 shows that the percentage of renter households in Burlington is forecast to grow from 25% in 2021 to 28% in 2034. Of the total housing growth over the 2024 to 2034 period, 39% (5,290 units) are forecast to be renter housing units, while 61% (8,130 units) are forecast to be owner housing units.

Figure 6-16
City of Burlington
Rental Housing Propensity Rate – Historical and Forecast, 2006 to 2034



Source: Historical data from Statistics Canada Census; forecast by Watson & Associates Economists Ltd., 2024.

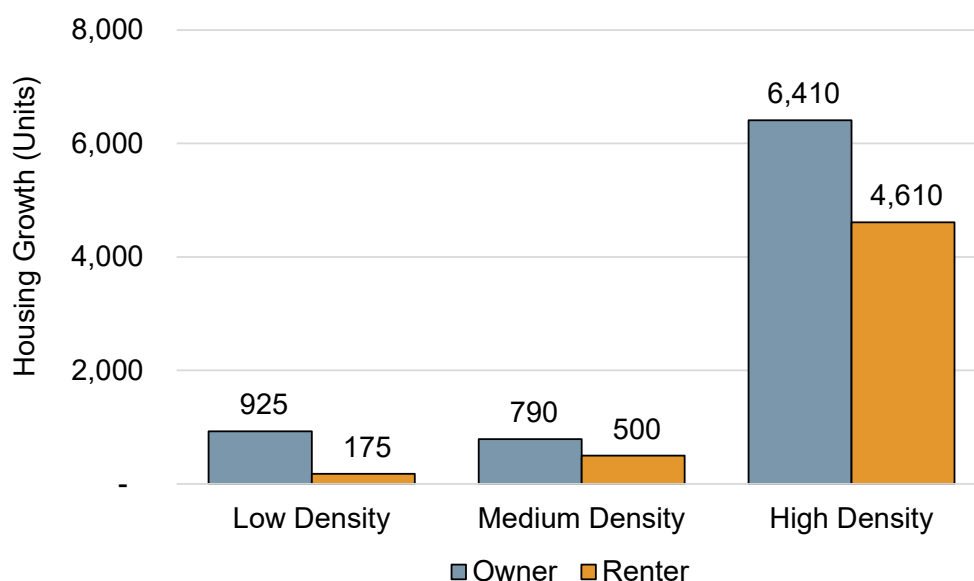
Based on the above rental housing propensity forecast, rental housing in the City is expected to increase by approximately 5,290 units over the 2024 to 2034 period, accounting for nearly 39% of total housing growth over the forecast period. As shown in Figure 6-17, rental dwelling growth in the City between 2024 and 2034 is forecast to comprise 3% low-density (singles and semi-detached), 9% medium-density



(townhouses and duplexes), and 87% high-density households (apartments and secondary units).

Similar to the rental housing forecast, most of the ownership housing growth in the City is expected to occur in the form of higher-density developments. Of the total forecast 8,130 ownership dwellings, low-density housing forms are projected to account for 11%, while high-density units are expected to make up 79%. The remaining 10% of housing growth is anticipated to occur in medium-density dwellings, as shown in Figure 6-.

Figure 6-17
City of Burlington
Future Housing Needs by Tenure, 2024 to 2034



Source: Watson & Associates Economists Ltd., 2024.

6.7.3 Housing Needs vs. Supply Assessment

As illustrated in Figure 6-, the residential supply pipeline for high-density units in Burlington is currently strong, with 19,580 units planned; however, only about 3,300 of these are expected to be ready for occupancy within the next five years. To meet the City's high-density housing needs over the next decade, development activity will need to more than double in the following five years (2029 to 2034) to align with the 10-year forecast, as shown in Figure 6-. Over the 10-year period, it is expected that approximately 90% of high-density unit supply growth will be in condominiums and 10%



purpose-built rentals. Recently, the development community has pivoted several condominium projects in Burlington to purpose-built rental projects which may shift some of the condominium units identified herein to purpose-built rental units.

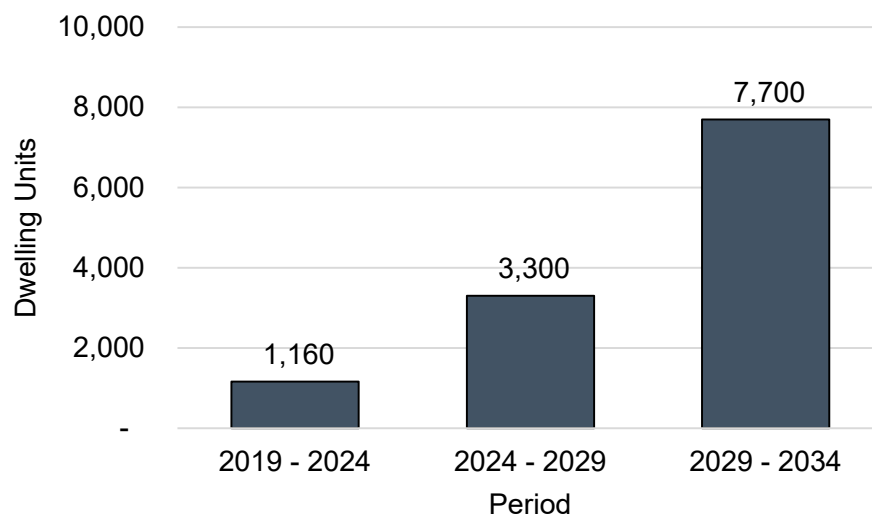
Figure 6-18
City of Burlington
High-Density Residential Supply Pipeline

Status	Condominiums	Purpose-Built Rental	Total
Planning Approval	3,935	320	4,255
Under Review	7,080	1,285	8,365
Waiting for Site Plan Application	4,705	360	5,065
Appealed to Ontario Land Tribunal	1,895	-	1,895
Grand Total	17,615	1,965	19,580
Share (%)	90%	10%	100%

Source: Adapted from City of Burlington development applications data (December 2024), by Watson & Associates Economists Ltd., 2024.



Figure 6-19
City of Burlington
High-Density Housing Development Activity – Historical and Forecast



Source: The 2019 to 2024 high-density units metric adapted from City of Burlington residential building permit data. Forecast prepared by Watson & Associates Economists Ltd., 2024.

Figure 6- summarizes the forecast 10-year housing needs by tenure in Burlington. As shown, there is a market demand for 4,600 rental housing units in Burlington over the 10-year period. As previously discussed, of the residential supply presented in Figure 6-, approximately 10% of this high-density development is anticipated to be in the purpose-built rental market, which is relatively low compared to the forecast demand identified.

Of the rental housing need of 4,600 over the next decade, 1,100 units (24%) of need is anticipated to be accommodated through new purpose-built rental housing while 76% (3,500) is anticipated to be accommodated through the secondary rental market. Burlington will continue to rely heavily on new condominium apartments in the secondary rental market to accommodate growth in renter households, as shown in Figure 6-. It is expected that based on current supply opportunities, approximately 35% of new condominium units will be rented out in the secondary market to meet rental market demand.

With a growing demand for rental housing, it is important for the City to have a more balanced supply growth for rental housing with primary and secondary rental housing



growing proportionally with the existing housing base. Focusing more on expanding purpose-built rental housing supply has a number of potential benefits for the City.

Purpose-built rentals offer:

- Generally lower market rents than comparable units in the condominium apartment market, providing more affordable and attainable housing options for renter households; renter households tend to have lower average incomes and represent a large share of low and moderate income households in the City.
- A more stable and certain housing supply for municipalities. They are not subject to the same broader market fluctuations and variability in housing tenure as the secondary market.
- Greater housing security for renter households. Individual tenants have guarantees for longer-term rental accommodation and purpose-built buildings offer amenities oriented to renter households.

Meeting the short- and longer-term needs of rental and affordable housing requires emphasis be placed on expanding the purpose-built rental inventory to meet growing market needs. While the secondary market continues to be an important supplier of rental housing in the market, it is recognized that to significantly increase the supply of rental housing in the market, greater participation by the private-sector development community and non-profit organizations to construct purpose-built rental housing will be required.

Figure 6-20
City of Burlington
High-Density Forecast Housing Needs

Units	Total	Owner Occupied	Renter Occupied
Total High-Density Units	11,000	6,400	4,600
Condominiums – 90% share*	9,800	6,400	3,350
Purpose-Built Rentals – 10% share	1,100	-	1,100
Additional Residential Units	150	-	150
Housing Needs	11,000	6,400	4,600

* Expected that approximately 35% of new condominiums will be rented out as condo rental apartments in the secondary rental market.

Source: Watson & Associates Economists Ltd., 2024.



6.8 Observations

There is a general recognition that the housing forecast presented herein is ambitious, particularly with respect to the level of high-density housing growth anticipated. While the near-term market for high density residential development is currently facing headwinds, the long-term horizon remains positive.

It is important to consider that Burlington is a maturing municipality within a broader regional market that has strong long-term growth potential. Recent trends suggest that the local market is evolving to include more opportunities for high-density residential development, in part due to eroding housing affordability, and an aging population base. As such, it is important to recognize that the demand for high density housing is becoming more diverse. While mid and high-rise condominium projects are expected to account for a large share of high density housing development, purpose built rentals and “missing middle” housing such as low rise apartments and A.R.U.s are expected to increase in their relative share. Rental vacancy rates are near record lows and the City has experienced strong market rent appreciation, reflecting strong demand for rental housing in Burlington. This greater diversity of high- density housing demand helps support the robust housing forecast presented.

Burlington’s M.T.S.A.s and other S.G.A.s represent a significant opportunity for the City to accommodate future population growth in a more diversified capacity. Given the robust housing growth outlook identified for Burlington, which is increasingly oriented to high-density developments, the M.T.S.A.s offer strong market attributes to accommodate these high-growth residential developments. Housing location options within Burlington’s M.T.S.A.s that offer proximity to employment, transit, and services/ amenities are anticipated to show strong market demand.

While the G.T.A. and Burlington condominium market is currently experiencing headwinds, the long-term prospects remain favourable. The condo sales market is expected to strengthen through 2025, supported by lower interest rates which should improve project development feasibility and expand supply and increase sales demand. In the meantime, purpose built rental housing development is expected to continue to strengthen, complementing the condominium market.

As Burlington continues to grow and mature, the demand for new housing products within the community is anticipated. Looking forward, the increasing cultural diversity,



an aging population, growing demands from new families, and eroding housing affordability will require that the City promotes and supports a broad range of new housing products by type, built-form, density, and price/affordability. This includes innovative approaches to accommodating new rental housing and various other ownership housing products that are attractive to a broad range of demographic groups.

Municipalities play a key role in addressing the challenges in the housing sector through effective local plans, policies, and programs that enable and support attainable and affordable housing development across the housing continuum. Housing needs should be addressed through a local lens and considered within a broader growth management framework that reflects existing population, labour, and employment/economic conditions and future growth potential.

As presented in this assessment, there are gaps in the current housing demand vs. supply that limit the upward potential of expanded annual housing development activity beyond what is identified in the growth analysis presented in Chapter 7.

To achieve the population growth forecast presented herein, the City will need to consider a range of factors in supporting and enabling a higher rate of residential development activity, with particular emphasis on rental and affordable housing. Burlington will require a broader choice of new housing products that appeal to a diverse range of demographic groups, by family and non-family type, structure type, location, age group, and income level. This includes expanding the rental housing supply, including purpose-built rentals, and increasing A.R.U. development activity. Furthermore, the City will need to expand affordable and attainable rental housing and ownership housing options.

The results of this study serve as a foundational document for housing in the City of Burlington, and this study is intended to guide decision-making and policy development specifically related to housing policy and programming in the City. Building on this report, the City may also consider reviewing through its housing strategy the role of the City in providing for housing across the housing continuum and to comprehensively explore and identify potential action items and implementation approaches to address local existing and future housing needs.



Chapter 7

City of Burlington Long-Term Population, Housing and Employment Growth



7. City of Burlington Long-Term Population, Housing and Employment Growth

This chapter explores three long-range population, housing, and employment growth scenarios for the City of Burlington to the year 2051. As part of this Growth Analysis Review, a recommended long-term growth forecast has been prepared for Burlington based on a detailed assessment of the City's long-range growth outlook within the context of economic and demographic trends for the Province of Ontario, the G.T.H.A., and Halton Region over the next several decades.

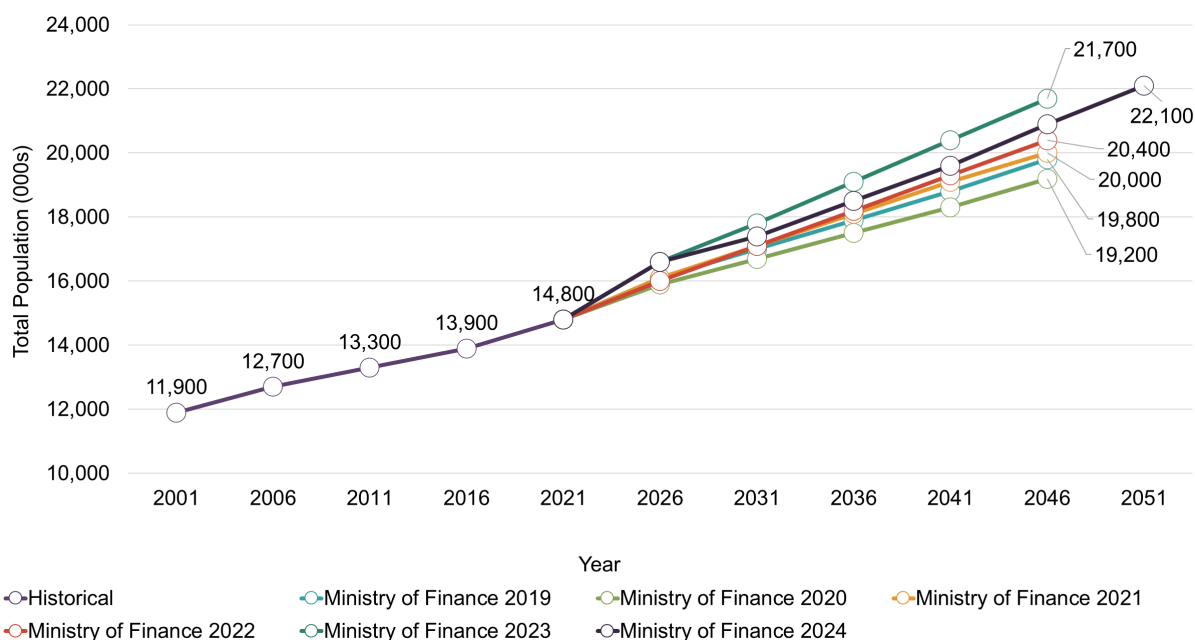
7.1 Approach to Long-Term Growth Forecasts

Figure 7-1 illustrates how the population across Ontario has changed over the past 20 years and how the Province is forecast to grow to the year 2051 in accordance with the most recent 2024 M.O.F. population projections. Key observations are as follows:

- Historically, the Province of Ontario has grown at a rate of 1.1% between 2001 and 2021, averaging approximately 147,300 people per year.
- Since 2020, the population projections for Ontario have steadily increased with each annual update, except for the most recent 2024 projections.
- In the most recent 2024 M.O.F. projections for the Province, the population has been downwardly adjusted relative to the 2023 M.O.F. projections, primarily due to recent reductions in federal immigration targets for N.P.R., as previously discussed. It should be noted that the 2024 M.O.F. population projections do not account for the most recent reductions to the Canadian federal immigration targets provided in the fall of 2024.
- Under the most recent 2024 M.O.F. forecast, by 2051, Ontario is expected to reach 22.1 million people. Under this most recent forecast, the Province is expected to grow at an annual rate of 1.3% or 242,600 people per year. Comparatively, the population of Ontario grew at an annual pace of 145,000 people per year between 2001 and 2021.



Figure 7-1
Province of Ontario
Ministry of Finance Projections, 2019 to 2024



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical data from Statistics Canada Census, 2001 to 2021 and Ministry of Finance projections from Summer 2019 to Fall 2024 releases derived by Watson & Associates Economists Ltd.

Over the past several decades, the G.T.H.A. and the Greater Ottawa Region have experienced the highest annual rate of population growth within the Province of Ontario. The G.T.H.A. 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. The industrial and office commercial real-estate markets within the G.T.H.A. are significant, having the third and sixth largest inventories, respectively, in North America.

Future population and employment growth within Halton Region, including the City of Burlington, is strongly correlated with the growth outlook and competitiveness of the G.T.H.A. regional economy. As previously noted, however, since 2011 and more notably during the latest Statistics Canada Census period (2016 to 2021), the share of Ontario's population growth has been increasingly concentrated outside the G.T.H.A., in



the G.G.H. Outer Ring, Eastern Ontario, and Southwestern Ontario. As previously noted, the City of Toronto experienced a sharp increase in population growth during the COVID-19 peak between 2021 and 2023 related to N.P.R. The longer-term growth patterns experienced between 2001 and 2021, however, are expected to continue over the forecast period and are reflected in the 2024 M.O.F. Reference Scenario. Accordingly, it is important that long-term population forecasts for Halton Region and the City of Burlington are not overstated within this evolving regional growth context.

It is also important to note that while near-term (2021 to 2023) population growth rates have been strong across most sub-regions of the Province, international migration levels associated with N.P.R. are anticipated to slow considerably across Ontario in the near term, particularly in the G.T.H.A., driven by recent announcements from the federal government to reduce the national N.P.R. population share from 7.3% in 2024 to 5.0% of the total population by the end of 2026 (refer to subsection 3.5.2).^[54]

Figure 7-2 presents the reference population forecasts for the G.T.H.A., in accordance with the M.O.F., since 2019.^[55] Key highlights include the following:

- Historically, the G.T.H.A. has grown at an annual average rate of 1.3%, which is higher than the Province as a whole.
- Similar to the Province of Ontario, with the exception of the 2020 and the most recent 2024 M.O.F. projections, the M.O.F. projections for the G.T.H.A. have been steadily increasing.
- In accordance with the 2024 M.O.F. projections, between 2021 and 2051, the G.T.H.A. is projected to grow at an annual rate of 1.3%, reaching a population of 11.3 million by 2051.
- Comparatively, the Growth Plan, 2019 forecast for the G.G.H. (A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019) projects that the G.T.H.A. is expected to grow at an annual rate of 1.3%, reaching 11.2 million people by 2051, which is consistent with the 2024 M.O.F. forecast^[56].

^[54] The N.P.R. share as of Q3 2024 is derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents. The N.P.R. national population target of 5% is from the Government of Canada 2025-2027 Immigration Levels Plan.

^[55] Based on Fall 2024 M.O.F. projections, the G.T.H.A. is expected to reach 11.3 million residents by 2051, an annual growth rate of 1.3%.

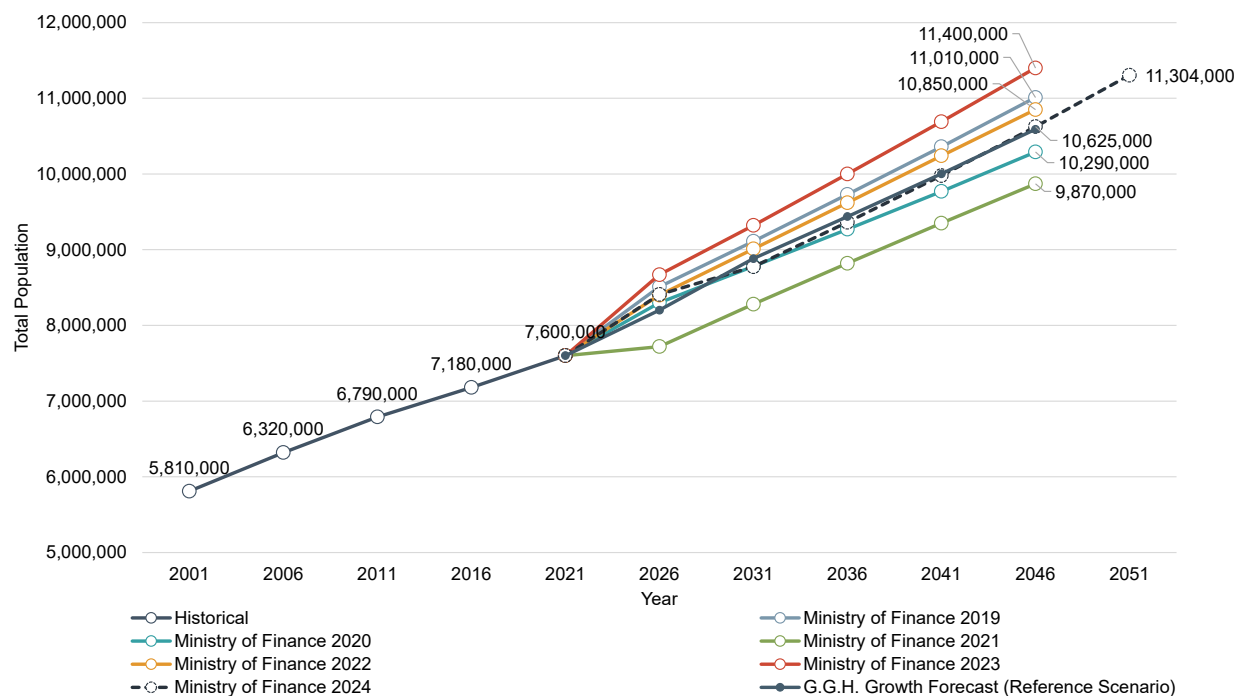
^[56] As of October 20, 2024 the Growth Plan is no longer in effect.



- While it is recognized that the 2024 M.O.F. projections for the G.T.H.A. as a whole are ambitious, based on our review, the Region of Halton, the Region of Durham, and the City of Hamilton appear to offer the greatest opportunity to exceed their respective M.O.F. forecasts. This is because opportunities exist within these municipalities to accommodate a broader range of residential development by structure type, price point, and tenure within developed areas, planned greenfield areas and potential expansion areas (where applicable).
- Based on our review, there is potential for the Region of Halton to exceed the 2024 M.O.F. population forecast over the long term, most notably in northern Halton Region where a broader range of grade-related housing options are available within planned greenfield areas or expansion areas. Notwithstanding this positive growth outlook for Halton Region, it is noted that the amount of forecast annual population growth identified under the 2024 M.O.F. projections over the 2021 to 2051 forecast period represents a substantial increase (38%) in annual population growth when compared to historical population growth trends experienced in Halton Region between 2001 and 2021.



Figure 7-2
Greater Toronto Hamilton Area
Ministry of Finance Projections, 2019 to 2024



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical data from Statistics Canada Census, 2001 to 2021, and Ministry of Finance projections from Summer 2019 to Fall 2024 releases, and from Greater Golden Horseshoe: Growth Forecast to 2051 Technical Report (August 26, 2020), derived by Watson & Associates Economists Ltd.

Figure 7-3 compares the 2024 M.O.F. Reference Scenario to the Growth Plan, 2019 forecast for Halton Region.^[57] Key observations include the following:

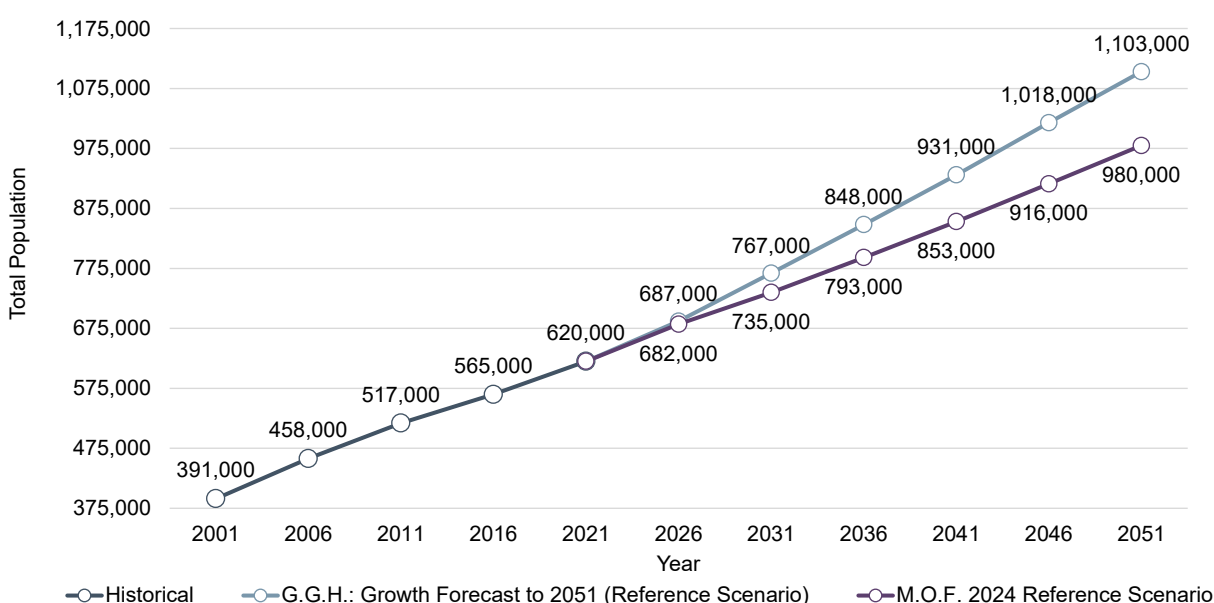
- Between 2001 and 2021, Halton Region grew at an average annual rate of 2.3%, which is approximately 11,200 people per year during this time period.
- The former Growth Plan, 2019 forecast for the G.G.H. estimates that Halton Region will grow at an average annual growth rate of 1.9%, while the 2024 M.O.F. Reference Scenario projects a lower growth rate of 1.5%.

^[57] Halton Region is expected to reach 980,300 people by 2046 in the Fall 2024 M.O.F. projections.



- By 2051, Halton Region is expected to reach 980,000 people under the 2024 M.O.F. Reference Scenario, which is approximately 120,000 people lower than the former Growth Plan, 2019 forecast for the G.G.H.
- In accordance with our review of regional growth trends and the long-term growth potential for Halton Region, it is our opinion that the 2024 M.O.F. forecast for Halton Region is conservative.

Figure 7-3
Halton Region
Projection Comparison, 2001 to 2051



Note: Population includes net Census undercount. Figures have been rounded.

Source: Historical derived from Statistics Canada Census, 2001 to 2021, and Ministry of Finance Projections Fall 2024 release and Greater Golden Horseshoe: Growth Forecast to 2051 Technical Report (August 26, 2020), by Watson & Associates Economists Ltd.

7.2 Near-Term Population Growth Trends, 2021 to 2026

Figure 7-4 illustrates the postcensal estimates for the City of Burlington and the near-term population forecast based on the J.P.B.E. and the R.O.P..^[58] Under the J.B.P.E.

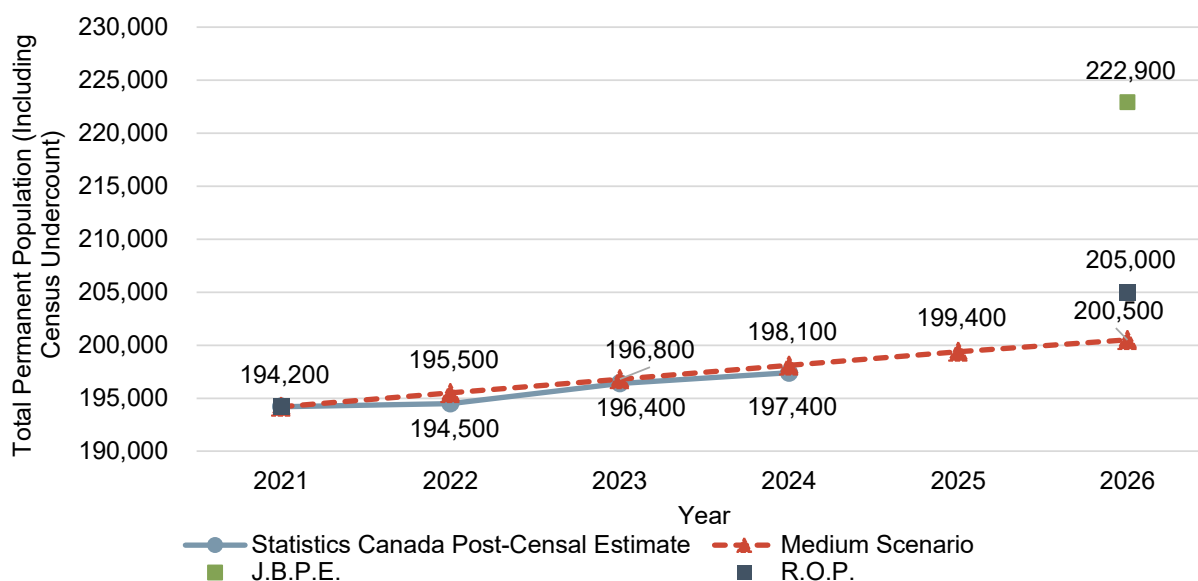
^[58] Postcensal estimates are based on the latest Census counts, which includes the net Census undercount, and on the estimated population growth that occurred since that Census, calculated using fiscal data as defined by Statistics Canada.



population forecast between 2021 and 2026, the City is forecast to grow at an annual rate of 2.8% per year, reaching 222,900 people by 2026. In comparison, under the R.O.P., the City is estimated to grow at an annual rate of 1.1% per year between 2021 and 2026, reaching 205,000 people by 2026, which is 17,900 people less than what was estimated under the J.B.P.E.

As of 2024, the postcensal estimate for the City of Burlington is 197,400 people. This represents an additional 3,200 people since the 2021 Census. According to our near-term population estimates, the City of Burlington is anticipated to track slightly lower than the 2026 population growth forecast that has been identified under the R.O.P.. Comparatively, the 2026 population estimate for the City under the Halton Region J.B.P.E. is forecast to significantly outpace the updated 2026 population estimates provided herein as part of this 2024 Growth Analysis Review. As previously noted, since 2023, pre-construction levels for condominium apartments have decreased considerably, primarily due to higher lending rates and the slowing of regional/provincial economic conditions since 2022. This suggests that high-density residential construction activity across Halton Region will moderate over the next year in comparison to recent development activity experienced over the past three to four years.

Figure 7-4
City of Burlington
Projection Comparison, 2021 to 2026





Note: Population figures have been rounded and includes net Census undercount. J
Source: Statistics Canada postcensal data derived from Table 17-10-0155-01, J.B.P.E. and
R.O.P. forecast derived from data file from Halton Region, summarized by Watson &
Associates Economists Ltd.

7.3 Longer-Term Population Growth Outlook in the City of Burlington

As previously noted, it is recognized that Burlington's long-term population growth potential is largely tied to the success of the G.T.H.A. as a whole. With a robust economy and diverse mix of export-based employment sectors, the G.T.H.A. is highly attractive to new businesses and investors on an international and national level. As previously noted, the G.T.H.A. is a fast-growing region in Ontario and more broadly in North America. The continued strength of the regional G.T.H.A. employment market, combined with local economic expansion opportunities across a range of goods-producing, services-producing, and knowledge-based sectors, presents a tremendous opportunity for existing/future businesses and residents within the City of Burlington.

Given the City's geographic location within the west G.T.H.A., approximately 60 km west of the City of Toronto, the City of Burlington is well positioned to attract a significant number of newcomers over the next three decades. The City's residential communities are supported by extensive local and regional infrastructure, including, but not limited to, highly ranking public and private schools, indoor and outdoor recreation facilities, a recently expanded hospital, cultural and retail amenities, higher-order regional transit, vibrant downtown and waterfront areas, as well as proximity to international airports and post-secondary institutions. Collectively, these attributes offer residents (particularly families) a world-class quality of life, which continues to represent a key draw to the City for existing and new residents and a range of businesses.

Notwithstanding the above factors that continue to attract new residents to the City, it has been previously noted that the G.T.H.A., including the City of Burlington, is experiencing increased outward growth pressure to other sub-regions within Ontario, particularly in the G.G.H. Outer Ring, Southwestern Ontario, and Eastern Ontario. This outward growth pressure has been largely driven by:

- The relative decline in housing affordability within the G.T.H.A. (including Burlington), compared to the other sub-areas within the Province;



- A gradual strengthening of regional economic conditions within all sub-areas of Ontario (i.e., as measured in terms of labour force growth within both services-producing and goods-producing sectors);
- Changes to the nature of work, led by technological improvements and increased options for remote/hybrid work, which were accelerated during the COVID-19 pandemic; and
- Lifestyle preferences as some residents from larger urban centres of the G.T.H.A. exchange “city lifestyles” for a greater balance of urban and rural living.

As a result of this outward growth pressure from the G.T.H.A., many of the municipalities within the G.G.H. Outer Ring, Southwestern Ontario, and Eastern Ontario are forecast to experience population growth rates comparable to, and in some cases greater than the G.T.H.A. over the next 25 years.

While the long-term population growth outlook for the City of Burlington remains strong relative to historical trends experienced over the past two decades, the City’s upward population and employment growth potential is anticipated to be largely tied to three key factors:

1. **The greenfield land supply to accommodate grade-related housing options geared to new and existing families is steadily diminishing.** The City will continue to offer a range of housing options within its S.G.A.s and new communities over the next several decades. Within the City’s S.G.A., housing options are anticipated to be geared almost exclusively to high-density forms. The City’s new communities of Bronte Creek Meadows, 1200 King Road, Tremaine-Dundas, Bridgeview, and Eagle Heights will provide a greater balance between grade-related and high-density housing. As these new communities build out over the next several decades, it is anticipated that the rate of housing construction associated with new low- and medium-density housing, including single detached, semi-detached, and townhouses, will continue to slow.
2. **The aging of the Baby Boom population will continue to place downward growth pressure on population growth due to declining growth from natural increase (i.e., births less deaths).** Similar to the Province as a whole, the City will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions. Furthermore, an aging labour force is also anticipated to place downward pressure on long-term



economic growth within the local and regional economy, driven by declining rates in labour force participation.

3. **There is a limit to annual absorption levels for high-density housing that the City can reasonably sustain over the long term within the context of the real-estate market outlook for the G.T.H.A.** As previously noted in subsection 4.2.1.2, the City averaged about 930 high-density building permits (new units) per year during its peak construction in 2016, 2017, and 2024 year-to-date. Comparably, the average number of new high-density housing units constructed in Burlington over the next three decades is forecast to increase significantly relative to historical trends experienced over the past two decades. Notwithstanding, it is unlikely that the City will experience sustained levels of new high-density housing development over the long term that will exceed the peak construction levels the City experienced historically. With respect to the high-density housing market, a steady increase in demand for high-density rental housing is anticipated within the City to accommodate increased needs associated with the City's growing population of low- and middle-income households. Currently, the City is experiencing a shortage of affordable rental housing accommodations.^[59] This emphasizes the continued need for a greater supply of non-market and market rental housing options (including both primary and secondary rental high-density accommodations and secondary units) and ownership condominiums, to address future high-density housing demand across all ages and income groups.

7.4 Aligning Housing Needs with Future Population Growth in the City of Burlington

While the long-term growth outlook for the City is very positive, it is important to recognize that accommodating new residents over a sustained long-term period at a level comparable to the past two decades will require the City to provide a broad range of housing options by location, structure type/density, and affordability to accommodate a growing and diversifying population base by age and income. Provided below is a brief discussion regarding the housing needs associated with the broad demographic

^[59] As of October 2023, the City of Burlington is reported to have a 1.6% vacancy rate for purpose-built rentals. A 3% rental vacancy rate is considered a healthy vacancy rate for purpose-built rental housing (refer to chapter 6 herein for further details).



groups that will be seeking housing in the City over the next three decades. Potential constraints to accommodate one or more of these broad demographic groups will ultimately limit the City's ability to achieve the recommended long-term population growth forecast set out herein.

7.4.1 Attracting Younger Generations

As previously discussed, population growth within the City of Burlington will continue to be increasingly driven by net-migration of adults between the ages of 35 to 44 and children aged 0 to 19. These age groups are anticipated to comprise nearly 100% of the newcomers to be accommodated within the City over the next three decades.^[60] In contrast, the City of Burlington has historically experienced out-migration of younger adults between 20 and 34 years of age, largely due to the draw of other communities within Ontario and beyond related to post-secondary education, local housing affordability barriers, and lifestyle preferences. The City is not anticipated to attract significant population growth associated with new residents 55+ years of age. These trends in net migration are generally consistent with many mid-sized and large suburban communities within the G.T.H.A.

A fundamental planning policy objective for the City of Burlington is to plan for complete communities that offer a broad range of housing options and a diverse mix of local employment opportunities. This is important because it recognizes that the City has a role to play in attracting, growing, and retaining local businesses by providing housing options to a growing local labour force base, including younger generations such as Millennials and Generation Z.^[61] To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by the Region of Halton and the City of Burlington (working with its partners) to explore ways to attract and accommodate new skilled working-age residents to the Region within a diverse range of housing options by structure type, tenure, and location. Labour force attraction efforts

^[60] It is noted that the City is anticipated to experience out migration in the 55 to 74 age group.

^[61] Millennials are typically defined as the segment of the population which reached adulthood during the 2000s. While there is no standard age group associated with the Millennial generation, people born between 1980 and 1992 (currently 32 to 44 years of age in 2024) best fit the definition of this age group. For the purposes of this study, we have assumed that those born between 1993 and 2005 (19 to 31 years of age as of 2024) comprise Generation Z.



must also be linked to a broad range of attainable housing accommodations (both ownership and rental), infrastructure, municipal services, amenities, and quality of life attributes that appeal to the younger mobile population while not detracting from the City's attractiveness to families and older population segments.

Not surprisingly, the results of this growth analysis indicates that housing occupancy associated with younger adults in the City of Burlington is highly weighted towards rental housing, particularly low-rise rental housing (apartments with fewer than five storeys) and secondary units within low-density neighbourhoods.

7.4.2 Accommodating Adults and Families

To a large extent, newcomers to the City within the 35 to 54 age group will continue to seek new and re-sale ground-oriented housing options, including single detached and semi-detached units and a variety of townhouse products (i.e., traditional townhouses, back-to-back, and stacked townhouses). In addition, increasing demand is anticipated across a range of other missing middle housing options, including duplexes, triplexes, fourplexes, and other low-rise hybrid buildings.^[62]

The analysis provided herein demonstrates that the composition of households in the City of Burlington is continuing to diversify. On the one hand, the City is experiencing a growing number of multi-generational families (refer to Appendix B, Figure B-4), which typically generate larger average household sizes in terms of average P.P.U. On the other hand, the City is also experiencing an increase in the share of non-Census families, which typically produce smaller average households. This suggests an increasing need to provide for a broader range of housing products by built-form/density and affordability to meet a diverse need of the community by life stage and income.

7.4.3 Accommodating an Aging Population

Forecast trends in population-age structure are important to address as these demographic trends directly influence the rate of future population growth, future housing needs, infrastructure requirements, and community services. For Canadian

^[62] The “missing middle” describes a range of medium-density housing types between single detached houses and apartment buildings. This includes a range of multi-unit or clustered housing types compatible in scale with single-family homes that help meet the growing demand for walkable urban living, such as duplexes, triplexes, fourplexes, row houses, and townhouses.



municipalities, including the City of Burlington, the influence of the Baby Boom generation on real-estate market demand over the next several decades remains a key issue.

As the City's Baby Boom population continues to age over the next several decades, the percentage of older seniors (i.e., people 75 years of age and older) is anticipated to steadily increase from approximately 10% in 2021 to 19% in 2051 (refer to subsection 7.5.1). This represents a forecast annual population growth rate for the 75+ age group of 3.2%, compared to 1.0% for the total population.

Within the 75+ age group, the growing share of people 85 years of age and older is particularly important to note. In 2006 the 85+ age group represented approximately 2% of the City's population, or about 3,000 residents. By 2051, the City's 85+ population is forecast to grow to approximately 27,000 persons, representing just over 10% of the City's total population base. Forecast population growth associated with the 75+ age group will be largely driven by the aging of the existing Baby Boom population within the City, as opposed to net-migration of older residents to this area.^[63]

Not only is the Baby Boom age group growing in terms of its population share in the City of Burlington, but it is also diverse with respect to age, income, health, mobility, and lifestyle/life stage. When planning for the needs of older adults, it is important to consider these diverse physical and socio-economic characteristics relative to younger population age groups. On average, seniors, particularly those in the 75+ age group, have less mobility and typically require greater health care compared to younger seniors (65 to 74 age group) and other younger segments of the working-age population. Typically, these characteristics associated with the 75+ age group drive relatively stronger demand for higher-density forms (e.g., rental apartments, condominiums, and seniors' homes) when compared to younger adults. Market demand for these types of housing products in the City of Burlington has been strongest in locations that are in proximity to urban amenities such as retail, dining and entertainment, health care facilities, and other community services geared towards older seniors.

Considerable research has been undertaken over the past decade regarding the aging population and its impact on housing needs over the long term. Most of the literature and commentary regarding the housing needs of older Canadians overwhelmingly

^[63] Over the 2021 to 2051 planning horizon, the 75+ age group is anticipated to be under 1% of total net migration in the City of Burlington.



suggests that a large percentage of seniors will “age in place”; that is, to continue to live in their current home and/or community for as long as possible even if their health changes.^[64] While there is strong rationale to support “aging in place” as a general concept, it is important to recognize the significant shift in Baby Boomer housing preferences in the City of Burlington over the past 15 years away from grade-related dwellings and towards high-density housing forms (refer to Appendix B, Figure B-9).

With this in mind, it is important to recognize that the concept of “aging in place” should emphasize the goal to age with some level of independence “within the community,” as opposed to simply “aging at home.” The overarching message around “aging in place” is that seniors require choice as well as access to services and amenities regarding their living arrangements.^[65] In part, this is being accomplished in the City by creating new housing options, largely in intensification areas to facilitate “aging in place” by providing housing options that allow seniors to remain in their communities when responding to life changes. In turn, providing a broader range of housing options for the City’s growing seniors’ population will reintroduce additional grade-related housing into the local supply inventory to accommodate existing and new families in Burlington.

7.5 Long-Term Population and Housing Growth Forecast 2021 to 2051

Figure 7-5 presents the long-term population forecast for the City of Burlington to the year 2051. For comparative purposes, the R.O.P. population forecast for the City of Burlington and the Halton Region J.B.P.E. for the City of Burlington are also provided.^[66] Please see Appendix H for additional details regarding the population and housing forecast for the City of Burlington.

Key observations are as follows:

- The City of Burlington’s population grew at an annual rate of 1.1% per year between 2001 and 2021, which is approximately 1,900 people per year.

^[64] Canadian Housing Observer 2011. CMHC. 2011.

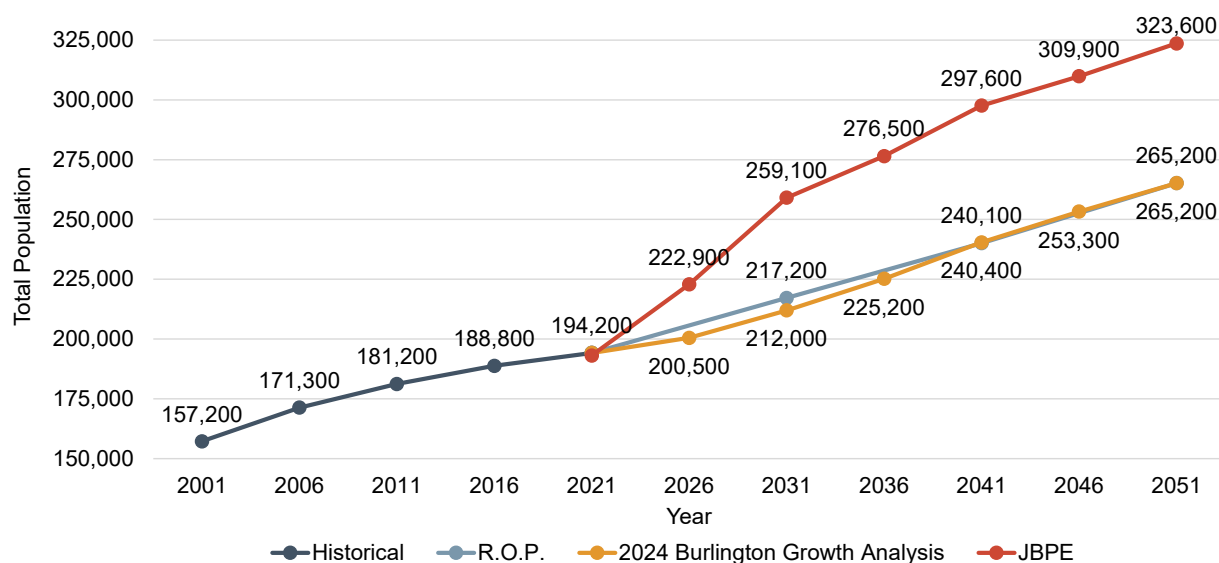
^[65] The Meaning of “Aging in Place” to Older People. The Gerontologist, Vol. 52, No. 3, 2012.

^[66] Halton Region Joint Best Planning Estimates data provided by the City of Burlington.



- Under the R.O.P. forecast, the City is expected to reach 265,200 residents, which represents an annual rate of 1.0%. Comparatively, this represents a growth rate that is consistent with what the City has achieved historically.
- In accordance with the Halton Region J.B.P.E. forecast, the City is expected to reach a 2051 population of 323,600, which represents an annual rate of 1.7%. As previously noted in section 7.2, the City is not tracking closely to the Halton Region J.B.P.E forecast for Burlington.
- Under the City of Burlington 2024 Growth Analysis Review, the City's forecast population is expected to reach 265,200 by 2051, representing an annual average growth rate of 1.0%, which is approximately 2,400 people per year. Comparably, this revised long-range growth scenario for the City of Burlington is consistent with the R.O.P. forecast for the City by the year 2051.

Figure 7-5
City of Burlington
Total Population, 2001 to 2051



Notes: Population includes net Census undercount and has been rounded.

Source: Historical 2001 to 2021 data derived from Statistics Canada Table 17-10-0152-01; J.B.P.E. and R.O.P. forecast derived from data file from Halton Region forecast prepared by Watson & Associates Economists Ltd.

Of the three long-term population growth scenarios prepared for the City, the 2024 Growth Analysis Review forecast, as prepared herein, is the recommended growth forecast scenario for the City of Burlington for the following reasons:



1. It represents a reasonable future rate of population growth relative to historical trends, considering recent and forecast immigration levels expected for Canada and Ontario over the next several years and longer-term population growth forecasts for the Province. Furthermore, the share of net migration and population growth in the 15 to 64 age group is reasonable within the context of historical migration patterns and broader demographic trends anticipated across the Province and the G.T.H.A.
2. Population growth in the City will continue to be largely driven by net migration (immigration) of working-age adults. Forecast trends in net migration are ambitious but reasonable for the purposes of long-range planning within the context of federal immigration targets and anticipated population growth rates across Halton Region and the surrounding area.
3. The forecast level of annual new housing development required to accommodate the recommended population growth forecast for the City represents an achievable increase in housing activity relative to historical trends experienced over the past two decades, when considering the forecast population growth outlook and corresponding housing needs across Halton Region and, more broadly, throughout the G.T.H.A.

In accordance with recent development trends and longer-term growth drivers for the City within the broader regional context noted above, the long-term population scenario under the Halton R.O.P. is reasonable. Comparatively, the long-term population growth forecast for the City of Burlington prepared under the 2023 Halton Region J.B.P.E. appears aggressive, particularly when considering the annual level of high-density housing growth required to achieve both the near- and long-term population forecast. Further discussion regarding the City's housing forecast by structure type is provided in subsection 7.5.2.

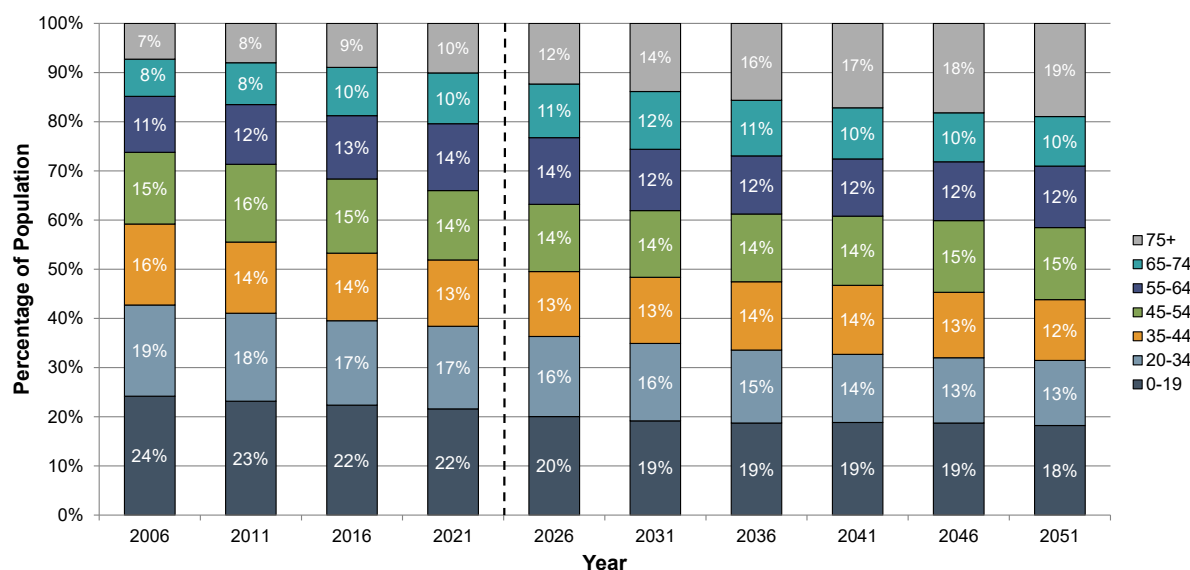
7.5.1 Forecast Population by Age Group

Figure 7-6 summarizes the City-wide forecast by major age group over the 2021 to 2051 forecast period. As previously noted, the City's population base is expected to steadily age, which is anticipated to place downward pressure on the rate of population and labour force growth within the City over the long term. Similar to the Province as a whole, the City will increasingly become more reliant on net migration as a source of



population growth as a result of these demographic conditions. For additional information about population by age group, please refer to Appendix C.

Figure 7-6
City of Burlington
Population by Age Group, 2006 to 2051



Note: Figures may not add precisely due to rounding. Population figures include net Census undercount.

Source: Historical 2006 to 2021 data derived from Statistics Canada Annual Demographic Statistics; 2021 to 2051 forecast prepared by Watson & Associates Economists Ltd.

7.5.2 Housing Forecast by Structure Type

In preparing the housing forecast by structure type for the City of Burlington, the following has been examined:

- Historical development activity (see section 4.2);
- Potential housing units in active development approvals (see Appendix F);
- Potential long-term housing intensification potential within the City's nodes and corridors; and
- Potential grade-related housing supply on the remaining vacant designated greenfield lands available for residential development.

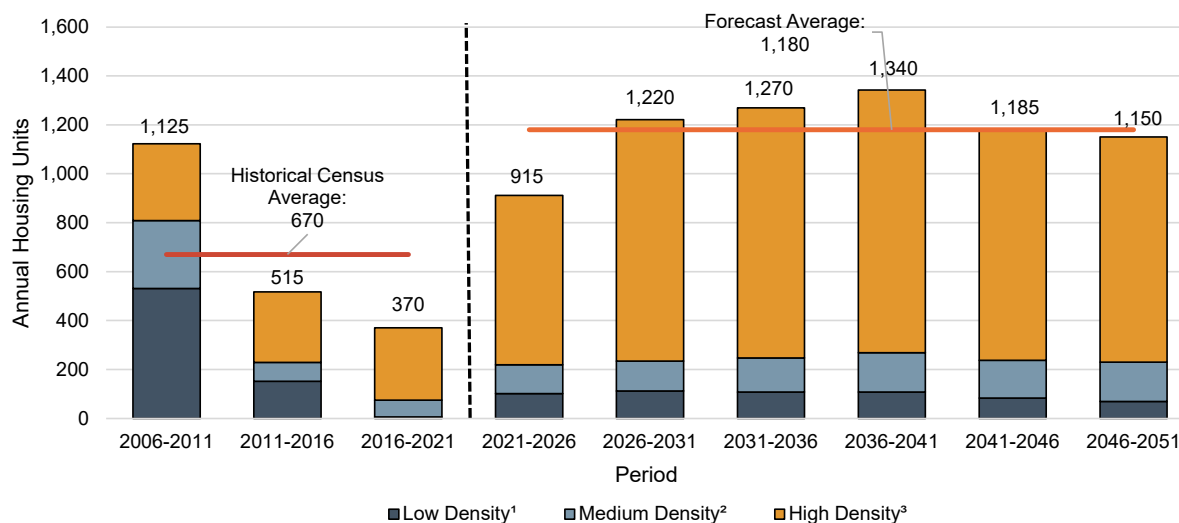


Figure 7-7 summarizes Burlington's recommended housing forecast by structure type (i.e., low density, medium density, high density, and secondary suites) over the 2021 to 2051 forecast period in five-year growth increments. Key observations are as follows:

- The 2024 Growth Analysis Review forecast represents an increase of approximately 35,400 households or just under 1,200 units per year.
- Comparatively, this annual level of forecast housing growth is close to double what has been achieved during the previous historical 15-year period (2009 to 2023).
- Between 2009 and 2023, the share of high-density housing constructed across the City has been relatively consistent. When considering recent building permit activity and active development applications, the share of high-density residential development is expected to grow over the longer term as opportunities for grade-related housing steadily diminish.
- Over the 30-year forecast period, most of the new residential development in the City is anticipated to be in the form of high-density housing. This shift in dwelling type preferences towards high-density housing is anticipated to be driven largely by demographics (i.e., aging of the population), continued upward pressure on local housing prices, and the availability of greenfield land to accommodate grade-related development.
- Over the 2021 to 2051 forecast period, new housing is expected to comprise 8% low-density units (singles and semi-detached), 12% medium-density units (multiples), and 80% high-density units (apartments and secondary units). It is noted that for the purpose of this study, high-density units include all forms of low, mid-rise and high-rise apartments as well stacked-townhomes and A.R.U.s.
- Over the next 30 years, the City is forecast to grow by 940 high-density housing units per year. This is more than two times the annual high-density housing growth when compared to historical trends achieved over the past 15 years.



Figure 7-7
City of Burlington
Housing Forecast by Structure Type, 2001 to 2051



^[1] Low Density includes singles and semi-detached houses.

^[2] Medium Density includes townhouses and apartments in duplexes.

^[3] High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Note: Figures have been rounded and may not add up precisely.

Source: Historical data derived from Statistics Canada Census profiles; forecast prepared by Watson & Associates Economists Ltd.

Figure 7-8, below, compares the housing forecast for the City of Burlington based on the housing pledge derived from Bill 23 (refer to subsection 2.1.1), the Halton Region 2023 J.B.P.E. forecast for the City of Burlington, Halton Region's Modified Preferred Growth Scenario, and the updated 2024 City of Burlington Growth Forecast prepared herein. Key observations include the following:

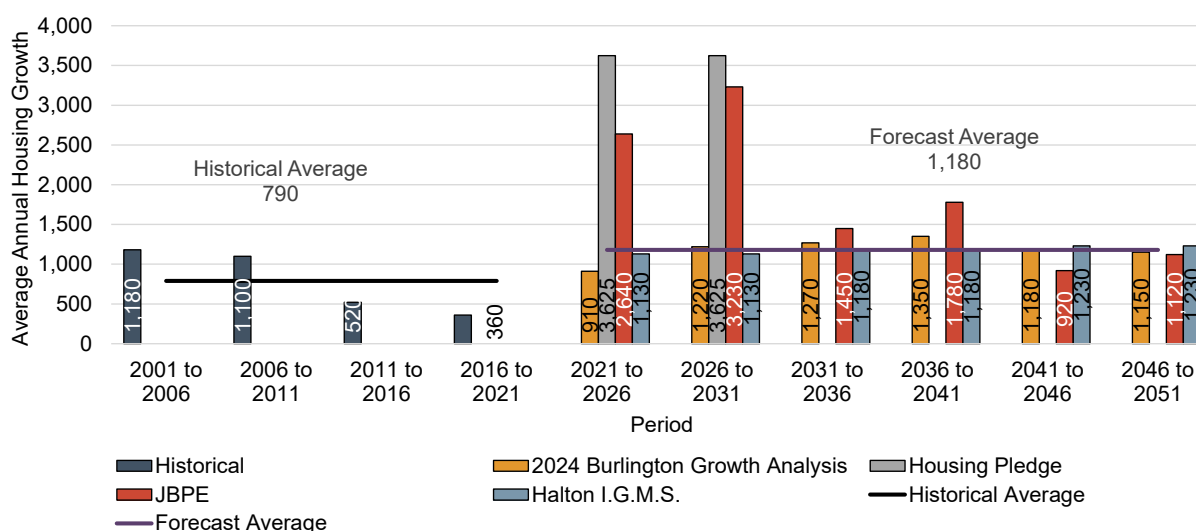
- The Halton Region J.B.P.E. and the Bill 23 housing targets identify significantly more housing growth for the City over the next 10 years compared to what has been historically achieved over the past two decades.
- Between 2021 and 2031, both the housing pledge and the Halton 2023 J.B.P.E. forecast around 3,000 units annually for the City of Burlington, which is more than three times what the City has historically achieved.
- The Halton J.B.P.E. forecast assumes a long-term housing forecast for the City of approximately 2,040 units annually. Of this total, approximately 78% housing units are within the high-density category, representing an average 1,590 high-



density units per year. Comparably, the Halton Region J.B.P.E. forecast assumes an annual rate of high-density housing that is 2.5 times what has been achieved annually in the City over the past 20 years.

- As previously mentioned, the recommended housing forecast, provided herein, represents an average of just under 1,200 new housing units per year between 2021 and 2051, with housing demand remaining generally stable over the next three decades, which is comparable to the I.G.M.S. Modified Preferred Growth Concept for the City of Burlington.

Figure 7-8
City of Burlington
Housing Forecast Comparison, 2021 to 2051



Note: Figures have been rounded and may not add precisely.

Source: Historical 2001 to 2021 data from Statistics Canada Census profiles for the City of Burlington. Forecasts derived from Bill 23 housing target, Halton Region's J.B.P.E., Modified Preferred Growth Concept Land Needs Assessment, March 2020 for the City of Burlington; summarized by Watson & Associates Economists Ltd.

7.6 City of Burlington Population and Housing Allocation

This section provides a detailed analysis of forecast population and housing growth within the City by Planning Policy Area, including Strategic Growth Areas, Special Planning Areas, New Community Areas, Established Neighbourhoods, and the Remaining Rural Area. A list of these areas is provided below (refer to Figures 2-5 and 2-6 in section 2.4).



Urban Area

Built-up Area

- Established Neighbourhood Areas
- Strategic Growth Areas
 - Primary Growth Areas
 - Burlington GO (former U.G.C.), Appleby GO, and Aldershot GO M.T.S.A.s
 - Downtown Core and Uptown Core
 - Secondary Growth Areas
 - Mixed Use Commercial Centres, Neighbourhood Centres, Urban Corridors, and Urban Corridors (Employment)

Designated Growth Areas (New Communities)

- S.P.A.s
- Bronte Creek Meadows and 1200 King Rd.
- Tremaine-Dundas, Eagle Heights, Bridgeview

Rural Area

- North Aldershot
- Remaining Rural Area

The population and housing allocations by Planning Policy Area were developed based on a detailed review of the following local supply and demand factors:

Local Supply Factors

- Supply of potential future housing stock in the development process by housing structure type and approval status;
- Short-, medium-, and long-term residential intensification opportunities;
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process;
- A review of preliminary development concepts (where available) for S.P.A. and New Community Areas;
- Consideration regarding servicing allocation; and



- Provincial and local policy direction regarding forecast residential growth by broader Planning Policy Area.

Demand Factors

- Historical residential building permit activity (new units only) by structure type from 2009 to 2024 year-to-date by Planning Policy Area;
- Anticipated timing of active development applications in the development process by housing structure type and approval status;
- Market demand for housing intensification by Planning Policy Area; and
- Forecast trends in housing by structure type.

7.6.1 Population Growth Allocations

Figure 7-9 summarizes the allocation of population growth by Planning Policy Area between 2021 and 2051 (please refer to Figures 2-5 and 2-6 for delineation of the City's Planning Policy Areas). Additional details are provided in Appendix H. Key assumptions are as follows:

- Over the 2021 to 2051 planning horizon, the City's B.U.A. is forecast to accommodate just under 65% of the City-wide population growth, with 43,900 people planned within this area. Within the B.U.A., the City's Primary Growth Areas are expected to accommodate 64% of forecast residential intensification.
- New communities in the D.G.A. are forecast to accommodate 35% of the City-wide population growth, representing an additional 23,800 people.
- Rural Areas are expected to account for less than 1% of the City-wide population growth.

In comparison to the Halton I.G.M.S., this updated Growth Analysis study directs a significantly greater share of population and housing growth to the City's D.G.A. in response to recent planning policy changes resulting from Bill 162 (refer to Chapter 2, Section 2.2)^[67]. Conversely, a lower share of population growth has been allocated to the City's Established Neighbourhood Areas relative to the Halton I.G.M.S. reflective of the relatively limited housing opportunities within these areas in comparison to other priority growth areas within the City's B.U.A. Similar differences in the share of population and housing growth by geographic area are also found between this Growth

^[67]The Halton I.G.M.S. with allocations by Traffic Zone was completed in 2023.



Analysis update and the Halton J.B.P.E.^[68] It is further noted that this Growth Analysis update forecasts significantly lower population growth to the City's Primary and Secondary Growth Areas in comparison to the Halton J.B.P.E.

Figure 7-9
City of Burlington
Population Growth by Policy Area, 2021 to 2051

Policy Area	Growth Area	Population Growth ^[1]	Percentage Share of Population
Built-Up Area	Primary Growth Area Downtown Core Uptown Core Appleby GO M.T.S.A. Aldershot GO M.T.S.A. Burlington GO M.T.S.A. Secondary Growth Area Established Neighbourhood Area	43,900	64%
Designated Growth Area	1200 King Bronte Creek Meadows Bridgeview Eagle Heights Tremaine-Dundas	23,800	35%
Rural	North Aldershot Remaining Rural Area	600	1%
City of Burlington	-	68,300	100%

^[1] Population figures include net Census undercount.

Note: Figures have been rounded and may not add up precisely. Source: Forecast summarized by Watson & Associates Economists Ltd.

7.7 Long-Term Employment Growth, 2024 to 2051

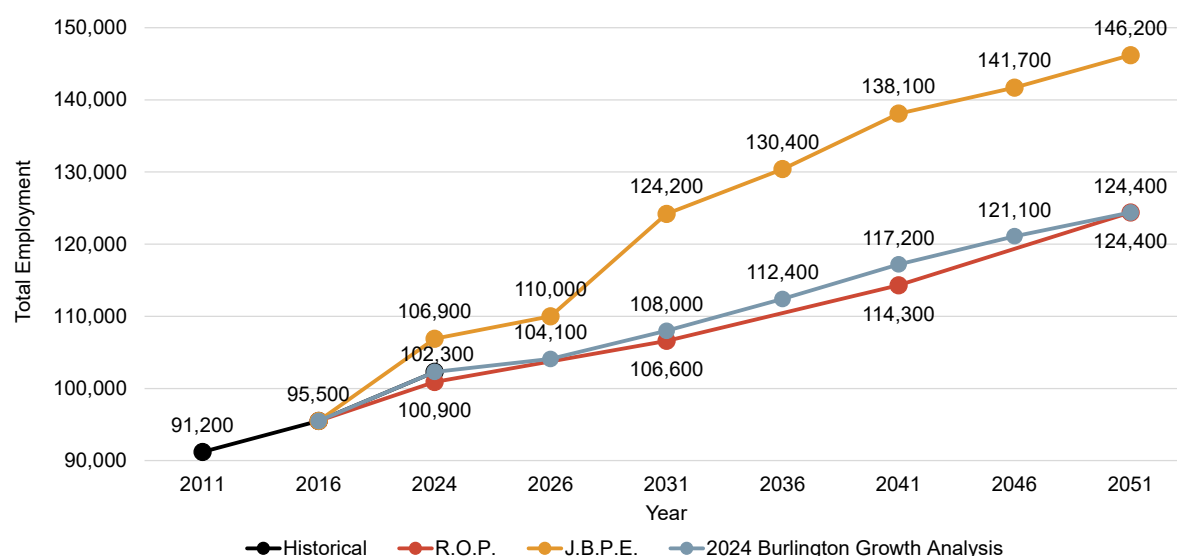
Building on the population and housing growth scenarios, as well as the provincial and regional economic review provided throughout Chapter 3, a revised long-term employment growth forecast has been prepared for the City of Burlington. As

^[68] J.B.P.E. forecast derived from Halton Region's Joint Best Planning Estimates for the City of Burlington



summarized in Figure 7-10, by 2051 the employment base for Burlington is forecast to increase by 22,000 employees, reaching 124,400 total jobs by 2051. For comparative purposes, the R.O.P. and J.B.P.E. employment forecast for the City of Burlington is also provided in Figure 7-10. As summarized below, in accordance with the detailed review undertaken as part of this Growth Analysis Review, the R.O.P. employment forecast remains as the “most plausible” long-term growth scenario for the City by the year 2051 considering forecast population growth trends and the City’s near- and long-term opportunities within its Employment Areas (refer to Chapter 8).

Figure 7-10
City of Burlington
Employment Forecast Comparison, 2024 to 2051



Note: Figures have been rounded. Total employment figures include work at home and no fixed place of work.

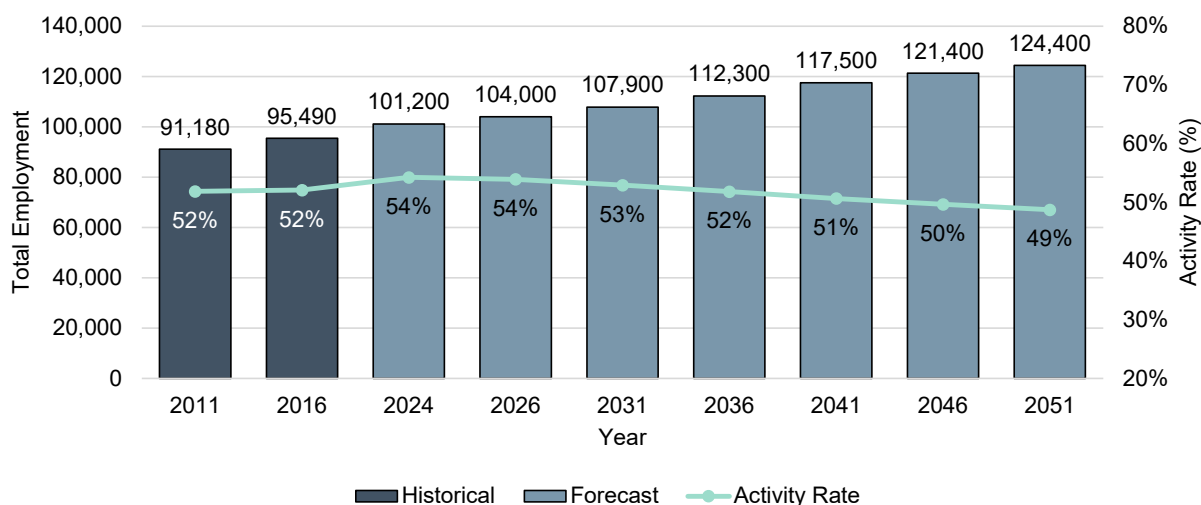
Source: J.B.P.E. forecast derived from Halton Region’s J.B.P.E. for the City of Burlington. R.O.P. forecast derived from Region of Halton – Regional Official Plan, presented by Watson & Associates Economists Ltd.

Figure 7-11 summarizes historical and forecast trends with respect to the City’s employment activity rate (ratio of jobs to population). Between 2011 and 2024, the employment activity rate for Burlington increased from 52% to 54%. The City’s employment activity rate is anticipated to decline slightly to 49% by 2051. This indicates that the rate of population growth in the City is anticipated to slightly outpace the rate of employment growth. As previously noted, the City’s aging population is anticipated to place downward pressure on the City’s labour force participation rate over the long-



term, which represents a constraint to long-term employment growth. For additional information regarding the City's employment by major sector, please refer to Appendix G.

Figure 7-11
City of Burlington
Long-Term Employment Forecast, 2024 to 2051



Notes:

- Figures have been rounded.
- Activity rate uses population, adjusted to account for net Census undercount estimated at approximately 3.9%.
- Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021.

Source: Data for 2011 to 2016 derived from Statistics Canada Census information; forecast prepared by Watson & Associates Economists Ltd.

7.7.1 Employment Forecast by Employment Major Sector/Category

Figure 7-12 summarizes the City's employment growth forecast in five-year increments over the 2024 to 2051 period by major employment sector/category, including primary (i.e., agricultural and resourced-based) employment, commercial employment, industrial employment, institutional employment, and no place of fixed work and work at home employment. Provided below is a brief description of the employment forecast by major sector/category for the City.



Industrial Employment

- The City is expected to accommodate approximately 3,000 additional industrial jobs (approximately 14% of the total City-wide employment growth between 2024 and 2051) within its established and planned Employment Areas, largely related to warehousing and transportation, manufacturing, construction, utilities, and other industrial uses.

Commercial Employment

- Commercial employment growth across Burlington is anticipated to be largely driven by opportunities associated with commercial retail and office employment, accounting for approximately 45% of employment growth (approximately 10,000 jobs) over the 2024 to 2051 forecast period.
- Retail and accommodation and food employment sectors generally serve the local population base by providing convenient locations to local residents. Typically, as the population grows, the demand for employment in these sectors also increases to serve the needs of the area.
- It is noted that e-commerce, automation, and increased urbanization is anticipated to have an impact on the function of “bricks and mortar” retail stores, by blurring the lines between warehousing and retail (i.e., retail stores with micro-fulfillment centres) and influencing the format of retail. Notwithstanding the rapid pace of e-commerce growth experienced over the past decade, demand for “bricks and mortar” retail is anticipated to be here to stay. Retailers continue to focus on the retail store model, as it is still considered the most profitable model for many retailers.
- Since the early 2000s, retail growth in urban centres across Southern Ontario has been primarily focused on infilling the existing retail sites through “baby-box” retail pads (smaller retailers with a similar building design to big-box retailers) in power centres, expansions of regional shopping centres, and retail growth oriented towards serving the local needs of a neighbourhood. National and local retail growth trends suggest efforts will continue to infill existing retail sites, with an emphasis on retail uses that focus on local serving uses, experiences, services, and “bargain hunting” retail destinations with no e-commerce platforms.
- These retail uses tend to have a smaller retail footprint, which provides more flexibility in accommodating mixed-use or intensification environments. These trends are anticipated to place a downward impact on the average floor space



per retail worker as retail operations with smaller building footprints typically generate lower average floor space per worker levels when compared to “big-box” retail operations.

- Burlington is also expected to experience a significant increase in knowledge-based employment driven by substantial growth in business services, professional, scientific, and technical services, and information and cultural industries, which will be largely accommodated within standalone and multi-tenant office buildings.
- As previously discussed, COVID-19 has accelerated changes in work and commerce as a result of technological disruptions that were already taking place prior to the pandemic. Accordingly, businesses are increasingly required to rethink the way they conduct business with a greater emphasis on leveraging technology to improve connectivity with employees and customers. These disruptive forces continue to broadly impact the nature of employment by place of work and sector and have a direct influence on office space needs in the following ways:
 - Upward pressure on office vacancy rates, including a negative net absorption of office space;
 - Higher sustained remote work levels with a continued preference by employees and employers for a hybrid model that offers opportunities for flexible workplace arrangements. This trend also provides the opportunity for employers to reach beyond the commuter-shed for talent;
 - Change in the office floorplan with a focus on “activity-based” workspaces (e.g., collaboration rooms, hot desking stations, larger kitchens, a variety of desk options, virtual conference rooms, rest areas, etc.);
 - Focus on flexible office-hour arrangements with less emphasis on the “9 to 5” office environment; and
 - “Flight to quality” office space where businesses are seeking higher quality offices with amenities on-site and nearby to attract talent and to bring employees into the office.

Looking forward, these trends are anticipated to generate increasingly higher average office floor space per worker levels and potentially reduce office space needs per capita over the long term. Such trends, however, are not anticipated to eliminate the need for new office construction over the long term.



Institutional Employment

- Institutional employment growth in Burlington is anticipated to account for 19% of employment growth between 2024 and 2051, amounting to about 4,100 jobs over the 27-year forecast period. Similar to much of the commercial employment sector, demand for institutional employment increases as the population grows, and particularly as the City ages, to serve the needs of an aging community. This category will be driven by demand in the educational services and health care and social assistance sectors.

Work at Home and No Fixed Place of Work Employment

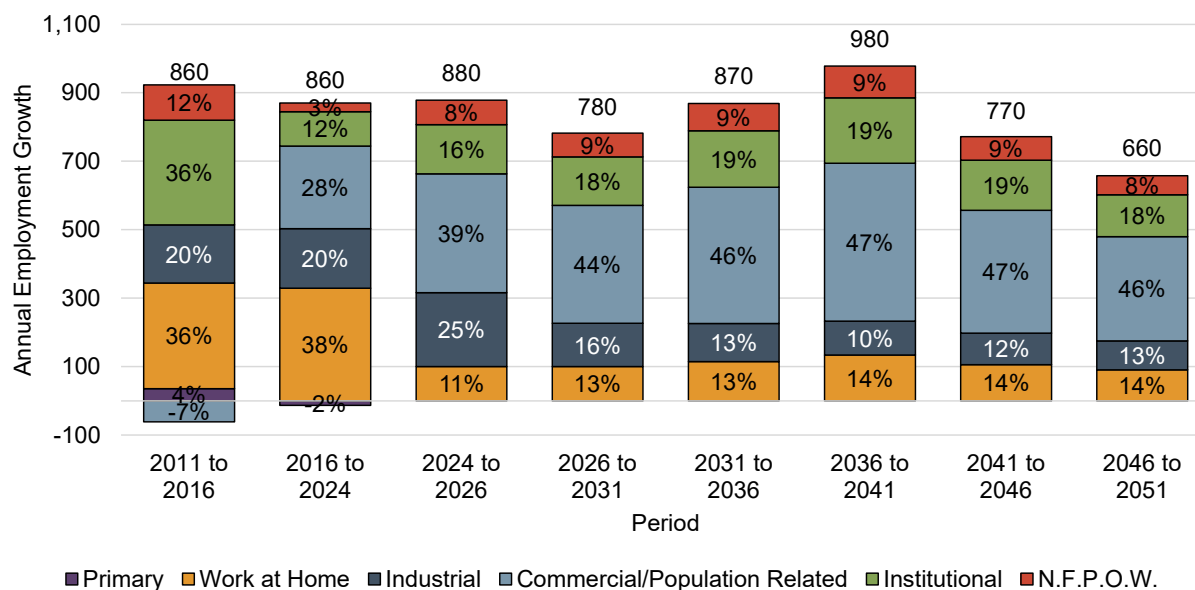
- Looking forward, continued advances in technology and telecommunications are also anticipated to increase the relative share of at-home and/or off-site employment over the long term. Demographics and socio-economics also play a role in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents within Burlington will utilize technology to provide or supplement their income in more flexible ways in contrast to traditional work patterns. It is also likely that an increased number of working and semi-retired residents will be seeking lifestyles that will allow them to work from home on a full-time or part-time basis across the City, as they transition from the workforce to retirement. Accordingly, approximately 22% of the total job growth is related to home occupations, home-based businesses, and off-site employment.

Primary Employment

- Primary (agricultural and resource based) sector employment in Burlington is not anticipated to grow over the 2024 to 2051 period.



Figure 7-12
City of Burlington
Total Employment Growth Forecast by Employment Category, 2011 to 2051



Notes: Figures include work at home and no fixed place of work employment.
Numbers may not add up precisely due to rounding. N.F.P.O.W. means no fixed place of work.

Source: Watson & Associates Economists Ltd.



Chapter 8

Employment Land Needs



8. City of Burlington Employment Land Needs

This chapter provides an assessment of the City's employment land needs to the year 2051, based on a comprehensive review of demand and supply within the City's Employment Areas.

8.1 City of Burlington Non-Residential Supply Analysis

Market competitiveness is driven by a broad range of factors that can strongly influence business location decisions, both for new development and expansions. These factors include access to transportation infrastructure, access to labour and employment markets, supply and market choice of land development opportunities, cost of doing business, business environment, and quality of life aspects.

As previously noted, the economic development prospects for Burlington are in many ways tied to the success of the broader regional market. The rise of employment land prices in recent years, combined with diminishing availability of vacant employment land in many of the larger urban centres across the G.G.H., has resulted in increasing industrial development opportunities across Southern Ontario, largely along the Highway 401 corridor, as well as other 400-series/limited access highway corridors. While these trends have been materializing across the Province, it is important to recognize that the City of Burlington has a well-established and marketable Employment Area land base, which offers significant opportunity for further intensification, and vacant lands available for development.

The degree to which Burlington can capitalize on its strategic west-G.T.H.A. location will depend largely on the quality and quantity of its Employment Areas to accommodate preferred employment uses. Figure 8-1 provides an overview of the City's existing supply of vacant developable Employment Area land parcels by size. Figure 8-2



provides a map illustrating the location of the City's vacant and underutilized Employment Areas. Key observations include the following:

- The City has 134 gross hectares of vacant developable Employment Area supply.^[69]
- Sites of less than 2 net hectares (5 net acres) represent 56% of total vacant parcels and 21% of total land area available for development.
- In terms of medium- and larger-sized parcels, those measuring 2 to 5 net hectares (5 to 10 net acres) account for 20% of vacant parcels and 35% of vacant Employment Area land.
- Sites measuring 5 to 10 net hectares (12.5 to 25 net acres) account for 6% of vacant parcels and 25% of vacant Employment Area land.
- Burlington currently has one site greater than 10 net hectares (25 net acres) which accounts for 10% of total vacant Employment Area land.

An additional 69 gross hectares of Employment Area land has been identified for potential intensification, including the expansion of existing business facilities and the redevelopment of Employment Area lands.

^[69] It is important to note that 143 ha Employment Areas land in Bronte Creek Meadows and 47 ha in 1200 King Employment Areas have been converted though R.O.P.A 48 and 49.



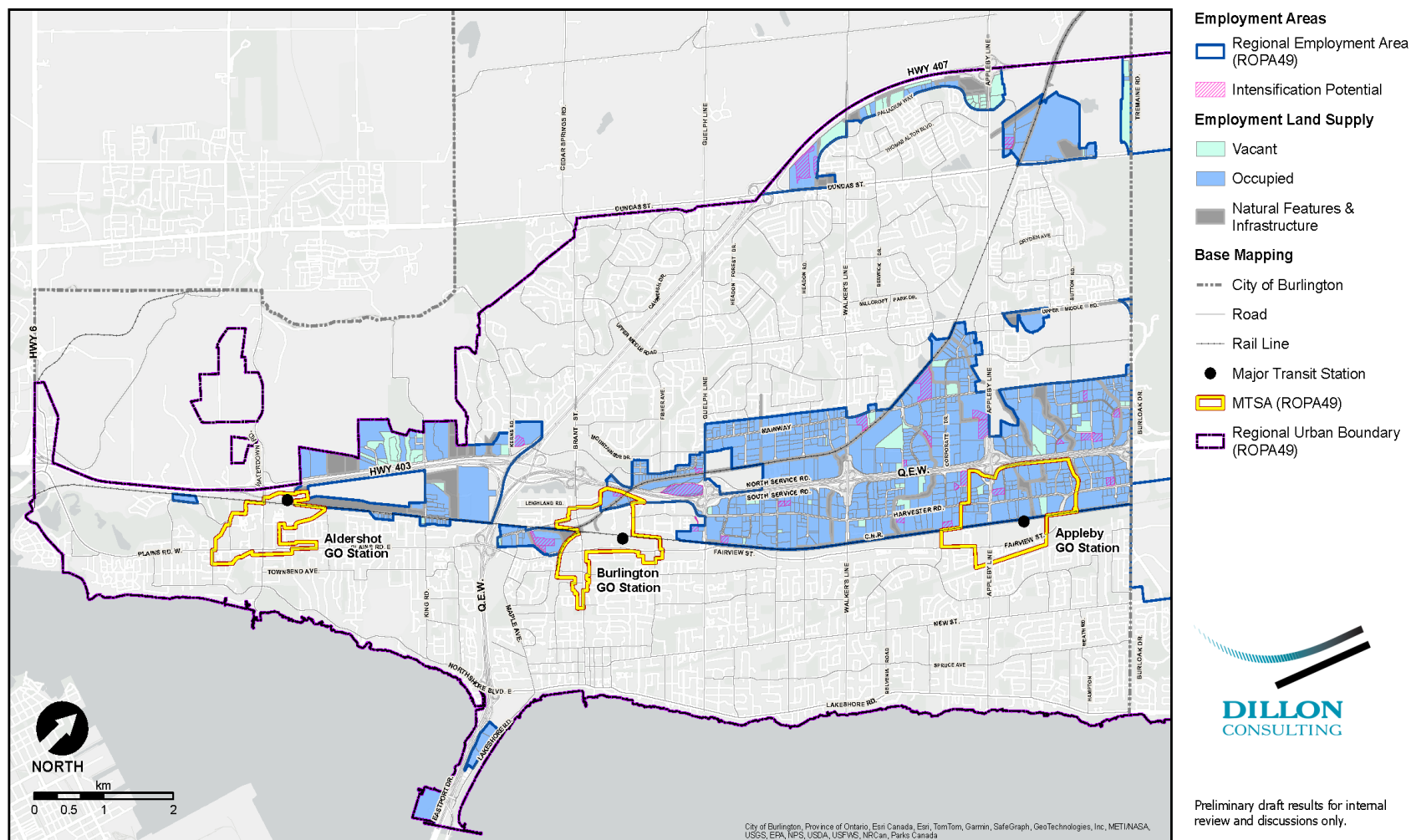
Figure 8-1
City of Burlington
Vacant Developable Employment Area Land Supply by Parcel Size

Parcel Size (Gross Hectares)	Total Parcels (#)	Share of Parcels (%)	Developable Land Area (Gross Hectares)	Land Area Share (Gross Hectares)
<1 hectares	44	56%	21	16%
1-2 hectares	13	16%	19	14%
2-5 hectares	16	20%	47	35%
5-10 hectares	5	6%	33	25%
10+ hectares	1	1%	13	10%
Total	79	100%	134	100%

Source: Derived by Dillon Consulting Limited and summarized by Watson & Associates Economists Ltd.



Figure 8-2
City of Burlington
Employment Land Supply





8.2 Employment Land Demand, 2024 to 2051

Building on the long-term employment forecast presented in section 7.7, the forecast for Employment Area land demand in the City of Burlington from 2024 to 2051, takes the following into consideration:

- Long-term employment land employment growth potential;
- Forecast employment density assumptions (i.e., employees/net hectare or acre) in Employment Areas;
- Trends in forecast Employment Area absorption; and
- The amount of vacant, developable shovel-ready land within Employment Areas across Burlington.

Figure 8-3 summarizes the City of Burlington Employment Area forecast from 2024 to 2051. The City's Employment Areas are anticipated to accommodate approximately 17% of the City's overall employment growth, totalling 3,660 employees. The Employment Area forecast largely comprises industrial employment classified within the warehousing and transportation, manufacturing, construction, and utilities sectors. A minor share of non-industrial uses associated with or ancillary to these primary industrial uses is also accommodated in the Employment Area forecast.

Figure 8-3
City of Burlington
Employment Growth on Employment Areas, 2024 to 2051

Employment Sector	City-wide Employment Growth	Employment Area Jobs	City-wide Employment Share Accommodated on Employment Areas
Industrial	3,000	3,000	100%
Commercial	10,030	160	2%
Institutional	4,120	70	2%
No Fixed Place of Work	2,930	440	15%
Work at Home	1,980	0	0%
Total	22,050	3,660	17%

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



8.3 Employment Area Intensification

When evaluating long-term Employment Area land needs, it is important to consider the potential employment growth that can be accommodated through intensification over the forecast horizon. Intensification can take on several forms, including the development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and the redevelopment of occupied sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization, resulting in higher employment density in existing Employment Areas. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g., roads, water/sewer servicing) and a built form that is more conducive to supporting public transit, resulting in communities that are more functional and complete.

Between 2015 and 2023, 20% of industrial permit values in the City were associated with additions/expansions based on Statistics Canada building permit data. This speaks to the intensification opportunities that exist across the City of Burlington. Over the planning horizon, 15% of the employment growth (approximately 490 jobs) in Employment Areas is anticipated to be accommodated through intensification.

8.4 Employment Area Land Needs, 2024 to 2051

As previously noted, the vacant employment land supply for the City of Burlington is established at 134 gross hectares (331 gross acres) or 100 net hectares (247 net acres).^[70] Some of the City's vacant employment land parcels may not develop over the planning horizon, due to small size, fragmentation, landowner willingness, odd configuration, access issues, inactivity/land banking, etc., which may tie up potentially developable lands. Long-term land vacancy is a common characteristic experienced in Employment Areas across Ontario. Accordingly, an estimated 15% long-term land vacancy has been applied to the net developable employment land inventory. Adjusted for land vacancy, the City's supply is 85 net hectares (210 net acres).

An average forecast density on Employment Area lands of 33 jobs per net hectare (13 jobs per net acre) has been applied. This density is consistent with planning policy

^[70] Gross to net Employment Area adjustment of 75% is applied.



direction established in the Halton R.O.P. for the City of Burlington.^[71] As noted previously, a 15% employment intensification assumption has been made on Employment Area lands. The City of Burlington is forecast to generate a total land demand of 83 net hectares (205 net acres) between 2024 and 2051. As highlighted in Figure 8-4, Burlington has a surplus of 2 net hectares (5 net acres) or 3 gross hectares (7 gross acres) of Employment Area lands to accommodate the growth forecast to 2051. This demonstrates the City will have almost entirely exhausted its remaining supply of vacant Employment Area lands which will be almost fully built-out by 2051. Growth on Employment Area lands beyond 2051 will primarily be accommodated through intensification opportunities of underutilized sites. Accordingly, it is recognized that there is a need to preserve and protect the designated Employment Areas within the City of Burlington for employment use over the long-term planning horizon.

^[71] The Regional Plan, Official Plan for the Halton Planning Area, Regional Municipality of Halton, Office Consolidation, May 16, 2024. Part II, Table 2: Intensification and Density Targets.



Figure 8-4
City of Burlington
Forecast Employment Area Land Needs (Demand vs. Supply), 2024 to 2051

Employment Area Demand (2024 to 2051)

Item	Calculation	Amount
Employment Area Jobs (excluding no fixed place of work)	A	3,230
Intensification %	$B = A \times 15\%$	480
Total Employment Growth Adjusted for Intensification	$C = A - B$	2,750
Employment Density (jobs per net hectare)	D	33
Employment Land Demand (net hectare)	$E = C / D$	83

Employment Area Land Supply

Item	Calculation	Amount
Employment Land Supply (gross hectare)	F	134
Employment Land Supply (net hectare) with 75% Net to Gross Adjustment	$G = F \times 75\%$	100
Land Vacancy Adjustment 15%	$H = G \times 85\%$	85

Employment Area Land Needs

Item	Calculation	Amount
Surplus/Deficit-75% Net to Gross Ratio (net hectare)	$I = H - E$	2
Land Area Surplus/Deficit (gross hectare)	$J = I / 75\%$	3

Note: Figures have been rounded.
Source: Watson & Associates Economists Ltd.



Chapter 9

Growth Management Recommendations



9. Growth Management Recommendations

9.1 Introduction

Over the next three decades the City of Burlington is anticipated to accommodate steady population growth. As Burlington continues to grow, mature, and evolve, a broader range of new housing options will be required, with a greater share of new housing development occurring through more compact medium- and high-density housing forms. To accommodate future residents in Burlington, there is also an increasing need to develop new and innovative approaches to housing development within areas that are pedestrian-oriented and transit-supportive. This includes options that provide greater opportunities for mixed-use development planned within intensification nodes and corridors, including secondary suites, live/work units, and a range of affordable housing opportunities.

The City's employment base is also anticipated to steadily grow across a broad range of export-based and population-serving employment sectors. The City, however, will be competing to attract and retain these sectors with other municipalities across the G.G.H. and beyond. To ensure the long-term competitiveness, growth, and diversity of the City's economy, planning and marketing efforts must be geared toward both the broader strengths of the City and specific target sector investment attraction efforts. To accommodate the steadily growing economic base within Burlington, the City's land use planning policies must anticipate the evolving nature of the local and regional economy and reflect the diverse needs of industry and businesses of all sizes over the long term. These policies must also offer a degree of flexibility and nimbleness that allows for relatively rapid responses to unforeseen changes, which can be a critical advantage relative to competitive markets.

Ultimately, a key objective for the City of Burlington will be to accommodate growth and change in a manner that preserves the City's livability while embracing development patterns that are sustainable from a triple-bottom line perspective (i.e., environmental, financial, and socio-economic). Provided with a clear growth management strategy, it is possible for the City of Burlington to plan for and accommodate urban development in an efficient and sustainable manner; however, it should be recognized that it is difficult for the City to reduce population growth pressures. This is because population growth and the associated urban growth pressures, more broadly across Canada and



specifically in the City of Burlington, are largely controlled by senior government policies and broader macro-economic forces (i.e., federal immigration policies, provincial and regional job growth, and regional migration patterns within the Province). As previously discussed throughout this report, population growth in the City of Burlington will be increasingly driven by immigration. It is also important to note that in the absence of positive immigration levels, the City's population and labour force base would be expected to gradually decline over the next several decades. Positive population growth is an essential component of a growing and competitive labour force and business community. Population and employment growth also contributes to the generation of new jobs for local residents and revenue sources to pay for existing and new municipal services and infrastructure.

While there are a number of positive impacts of population and employment growth, if not managed adequately new development can create negative externalities, such as, but not limited to, land use conflicts, increased traffic congestion, reduced housing affordability, negative environmental impacts and loss of productive agricultural lands. Accordingly, it is important that new urban and rural development is planned for and accommodated in a manner that supports the policy objectives of the B.O.P. and the City of Burlington Strategic Plan. Furthermore, it is critical that the amount, type, timing, and location of development within the City's priority growth areas, as well as its established urban neighbourhoods and rural areas, is planned in a manner that is well aligned with infrastructure and municipal service needs.

The purpose of this Growth Analysis Review is to establish a long-term vision for the City of Burlington related to its broad long-term growth management goals and objectives. More specifically, this chapter provides direction regarding long-term population and employment growth, housing needs by planning policy area, development phasing, planning for Community Areas and Employment Areas, and growth monitoring. This review will serve as a foundational document to the B.O.P. and the City's Strategic Plan by providing guidance with respect to where and how residential and non-residential development or change is planned and prioritized as the City continues to mature and evolve over the near-, medium- and long-term planning horizon.

Due to recent changes to the Ontario *Planning Act*, as previously discussed in Chapter 2, the City of Burlington is now required to take the lead role in developing a long-term growth strategy. The following growth management planning policy recommendations



are provided below to support and inform the B.O.P., the Strategic Plan as well as other growth-related projects underway at the City.

9.2 Develop a New Long-Term Vision and Refine Strategic Growth Management Goals for the City

Policy Context: Ultimately, growth management policies should aim to build complete communities, enhance livability and economic prosperity, while protecting what is important to residents and local businesses. These long-term objectives emphasize the importance of measuring performance against quantitative metrics such as economic growth and broader city building indicators related to housing, neighbourhood design, transportation, environment, health, social engagement, financial sustainability, and opportunity. Typically, core growth management policies address the following key elements:

- Availability of land and future urban land needs, land utilization (i.e., density and built form), urban design, appropriate types and locations of urban and rural land uses, and hierarchy of urban and rural land uses;
- Increasing housing choice and providing affordable housing;
- Economic and socio-economic vitality, “place-making,” structural economic trends, municipal competitiveness, and the changing nature of work;
- The protection of the natural environment and the City’s cultural heritage; and
- Efficient utilization of municipal services and infrastructure, and the movement of people and goods.

Recommended Action:

- Near-term and longer-term strategic goals of this review are provided to give direction to the City’s revised Strategic Plan and updated B.O.P.
- Prepare new, refined and revised growth management policies in accordance with the findings of this study.

9.2.1 *Plan for Steady Population and Employment Growth over the Long Term*

Policy Context: The City is projected to experience steady population and housing growth over the long-term planning horizon. The City’s in-effect B.O.P. establishes



broad policy direction regarding the long-term vision for the City and determines a growth framework for the City through a collection of policies and schedules that provide guidance on where the City plans to direct growth and intensification. Section 56.1, Table 1, of the former Region of Halton R.O.P. specifically sets out the City's long-term population and employment forecast to the year 2051.

As previously noted in Chapter 1, the P.P.S., 2024 requires municipalities to consider population and employment growth forecasts prepared using M.O.F. projections and allows municipalities to modify these forecasts, as appropriate.^[72] The use of the M.O.F. forecasts is not meant to replace long-term forecasting by municipalities. Rather, the M.O.F. forecasts are to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area-municipal growth allocations. This approach was carried out for this study.

The P.P.S., 2024 requires Ontario municipalities to provide sufficient lands available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of 20 years, but not more than 30 years. Additionally, municipalities are permitted to plan for infrastructure, public service facilities, S.G.A.s, and Employment Areas beyond a 30-year time horizon.^[73]

Recommended Action: Update Long-term Population, Housing, and Employment Growth Projections and Density Targets

- As per section 56.1, Table 1, of the Region of Halton R.O.P., the City of Burlington's long-term population and employment growth forecasts to the year 2051 are 265,100 and 124,400, respectively. It is recommended that the City's 2041 and 2051 population and employment forecasts remain consistent with Table 1 in the former Region of Halton R.O.P.
- It is recommended that Burlington's corresponding housing forecast be included in the City's long-term growth forecast summarized in Table 1 of the former Region of Halton O.P.
- It is recommended that the City of Burlington use the population and employment forecasts for the years 2021, 2031, 2041 and 2051 to guide policies of the B.O.P. and other growth related work.

^[72] Provincial Planning Statement, 2024, policy 2.1.1, p. 6.

^[73] Ibid., policy 2.1.3, p. 6.



Figure 9-1
City of Burlington
Population, Housing, and Employment Forecasts, 2021 to 2051

Year	Total Population	Total Employment	Total Housing
2021	194,000	-	73,200
2031	212,000	107,900	83,900
2041	240,000	117,500	96,900
2051	265,000	124,400	108,600

Source: Watson & Associates Economists Ltd. Updated and modified from Halton Region Official Plan, Table 1.

9.3 Plan for Significant Residential Intensification

Policy Context: Residential intensification contributes to building complete communities and often makes more efficient use of existing infrastructure and public services and minimizes adverse impacts to the natural environment and agricultural lands. The P.P.S., 2024 establishes clear policy direction to encourage sufficient land within settlement areas is made available through intensification and redevelopment. Based on a detailed assessment of near-, medium-, and long-term intensification opportunities, the City has significant opportunities for utilizing intensification sites to meet a broad range of future housing needs within developed areas.

The City's B.U.A., as delineated in Schedules B and B-1 of the B.O.P., 2020, constitutes the developed Urban Area of the municipality, as defined by the Province of Ontario in consultation with the City in 2006 and subsequently finalized in April 2008. It is noted that the B.U.A., as previously defined by the Province of Ontario, is no longer applicable under the P.P.S., 2024. Notwithstanding this recent change to provincial planning policy, it is recognized that the focus of future residential intensification has not changed from the current direction provided in the City's in-force O.P.

Subsection 2.3 of the P.P.S., 2024 identifies that planning authorities shall establish and implement minimum targets for intensification and redevelopment within B.U.A.s, based on local conditions. In accordance with the urban structure identified in subsection 3.2.1 of the B.O.P., 2020, the City's Mixed Use Intensification Areas represent a strategic



focus in accommodating and directing growth in the City over the planning horizon and beyond. The Mixed Use Intensification Areas comprise Urban Centres, including the Downtown Urban Centre and the Uptown Urban Centre, and M.T.S.A.s, including Burlington GO, Aldershot GO, and Appleby GO. These areas collectively represent the City's Primary Growth Areas. Other mixed-use nodes and intensification corridors, which represent the City's Secondary Growth Areas, are also a focus for residential intensification for the City.

Over the 2021 to 2051 planning horizon, it is anticipated that approximately two-thirds of future residential development will occur through intensification. Of this total, approximately 69% of residential intensification is directed to Primary Growth Areas, while 20% is directed to Secondary Growth Areas. The remaining 11% of residential intensification is to be directed to Established Residential Neighbourhood Areas.

Recommended Action: Revise the City's Minimum Intensification Target and Monitor Regularly

- It is recommended that the City continue to delineate its B.U.A. in accordance with Schedules B and B-1 of the B.O.P., 2020.
- In accordance with the direction provided in the B.O.P., 2020 regarding the City's Urban Structure and Growth Framework, it is recommended that the City target a minimum of 65% of all new residential development within the B.U..A.
- Within the B.U.A., residential intensification shall continue to be directed to the City's Primary and Secondary Growth Areas.
- It is recommended that the City monitor residential intensification activity on an annual basis against this target.

9.4 Maintain Residential Density Targets in Primary Growth Areas

Policy Context: The P.P.S., 2024 requires Ontario municipalities to establish minimum density targets for M.T.S.A. areas. For commuter rail M.T.S.A.s, the minimum target is 150 people and jobs per hectare. The P.P.S., 2024 no longer refers to Urban Growth Centers or requires municipalities to set minimum densities for these areas.



Recommended Action: Maintain the Minimum Density Targets in the City's M.T.S.A.s/Primary Growth Areas

- In accordance with the revised direction set out in the P.P.S., 2024, the following long-term density targets are recommended in the City's M.T.S.A.s to inform regional and municipal servicing, consistent with the current B.O.P.:

Figure 9-2
City of Burlington
Proposed Minimum Density for Primary Growth Areas
(Major Transit Station Areas)

Primary Growth Areas (M.T.S.A.s)	Minimum People and Jobs per hectare
Aldershot GO M.T.S.A.	150
Burlington GO M.T.S.A.	200
Appleby GO M.T.S.A.	120

9.5 Plan for Minimum Residential Density Targets in Designated Growth Areas

Policy Context: The P.P.S., 2024 establishes an average planned density target of 50 people and jobs per hectare in D.G.A.s. It is noted that D.G.A. densities with specific D.G.A. developments vary considerably. Accordingly, D.G.A. density targets for specific D.G.A. developments should be compatible with the nature and scale of planned development in the surrounding greenfield areas.

Recommended Action: Revise the Minimum Density Targets in the City's D.G.A.s

- Consistent with the P.P.S. 2024, the City should maintain a minimum average D.G.A. density of 50 people and jobs per hectare.
- The City should plan for minimum density target that is compatible with the nature and scale of development within the surrounding area.
- It is recommended that the City explore opportunities, working with its private sector partners, to increase the share of medium-density housing options, particularly entry-level townhouse products, within its new D.G.A.'s.



9.6 Prepare a Revised Phasing Plan to Guide Residential and Non-Residential Growth

Policy Context: A significant amount of growth is expected in the City of Burlington and not all growth can or will happen at the same time, from a practical perspective, primarily due to the anticipated market demand for urban development and because of the time it will take to extend infrastructure in a logical and efficient manner. As a result, a key deliverable of this review is the establishment of a recommended phasing plan for the City's Primary and Secondary Intensification Areas, New Community Areas, and Established Neighbourhoods.

Within the City, certain areas have the capacity to play a more significant role in accommodating growth and intensification. In accordance with anticipated market demand, key investment decisions should prioritize the achievement of intensification and higher densities within the areas identified under the Urban Structure hierarchy of the B.O.P. In addition, the City should consider planning policies and tools to stimulate development within identified intensification areas that are considered slower growth areas. Furthermore, the Region and the City should identify infrastructure projects and investments that can unlock or remove barriers to achieve forecast growth potential in identified urban growth areas.

Recommended Action: Provide a Recommended Residential and Non-Residential Development Phasing Plan

- The proposed development phasing schedule provides a broad framework for guiding the timing of development and servicing associated with lands in the City of Burlington in five-year increments over the next three decades.
- It is important that the City regularly monitor growth and land development in accordance with the recommended phasing plan identified herein. Specific areas have been prioritized for urban development, in accordance with the stage of develop approvals, municipal servicing, and anticipated market demand.
- In the case of significant delays, the proposed phasing plan should be adjusted at the City's discretion.



Figure 9-3
City of Burlington
Proposed Residential Phasing Plan by Planning Policy Area (Households)

Planning Policy Area	Period	Low-Density ^[1]	Medium-Density ^[2]	High-Density ^[3]	Total
Built-Up Area	2021 to 2026	220	590	3,460	4,270
	2021 to 2031	250	840	7,370	7,850
	2021 to 2036	270	1,080	10,960	12,310
	2021 to 2041	290	1,390	14,720	16,400
	2021 to 2046	300	1,710	18,420	20,440
	2021 to 2051	310	2,090	21,980	24,380
Designated Growth Area	2021 to 2026	240	0	0	240
	2021 to 2031	750	360	1,020	2,740
	2021 to 2036	1,250	810	2,540	4,600
	2021 to 2041	1,760	1,310	4,140	7,210
	2021 to 2046	2,140	1,760	5,190	9,090
	2021 to 2051	2,440	2,190	6,230	10,860
Rural Area	2021 to 2026	50	0	0	50
	2021 to 2031	70	0	0	70
	2021 to 2036	90	0	0	90
	2021 to 2041	100	0	0	110
	2021 to 2046	120	0	0	120
	2021 to 2051	150	0	0	150

^[1] Includes single and semi-detached units.

^[2] Includes row townhouses, back-to-back townhouses and apartments in duplexes.

^[3] Includes stacked townhouses, bachelor, 1 bedroom and 2 bedroom+ apartments units, and secondary suites. Source: Watson & Associates Economists Ltd., 2025.

9.7 Plan for Office Development in Major Transit Station Areas

Policy Context: 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.

Steady employment growth is identified for the City of Burlington and the Region of Halton that is increasingly oriented towards knowledge-based sectors. The City's M.T.S.A.s and remaining Primary Growth Areas offer strong market attributes to accommodate these growing employment sectors. Considering the near and longer-term market outlook for office development opportunities identified within the City's Primary Growth Areas, the City should continue to prioritize its efforts to encourage and promote office and mixed-use development where market demand potential is highest. The City should also work to identify potential gaps between planning policy objectives and market demand across each of the City's M.T.S.A.s, remaining Primary Growth Areas, and Secondary Growth Areas. This will help identify where the utilization of financial tools and planning incentives to facilitate development, where fiscally sustainable, may be required to support planning policies regarding intensification within these areas.

When planning for employment in the City's Primary Growth Areas, it is important to consider the following:

- **Not all forms of office development can be accommodated in Primary Growth Areas** – The provincial and local planning policy framework directs larger office developments to M.T.S.A.s and S.G.A.s where multi-modal transportation and existing or planned frequent transit service will be available to support live/work opportunities. Certain commercial and industrial facilities (e.g., manufacturing, assembly, and warehousing) with office uses, training facilities, and showcase rooms/ancillary retail are often integrated on site. Operations such as these can be land intensive and have unique location requirements that are typically not appropriate in Mixed Use Intensification Areas and should be directed to Employment Areas. Furthermore, Employment Areas provide opportunities to accommodate multi-use facilities, such as larger industrial operations adopting a campus-style setting that requires surface parking and future expansion potential.
- **Office development potential outweighs demand** – In planning for office development in M.T.S.A.s, the City of Burlington and the Region of Halton should be realistic about the amount of office growth that might be attracted to these areas over the planning horizon. While the City should continue to develop



policies and tools that encourage office development, the reality is that potential supply outweighs demand. In planning for new stand-alone office developments within M.T.S.A.s, there needs to be corresponding consideration to prioritize development to also create transit-oriented, vibrant urban centres and minimize potential competition between these locations.

- **Provide the right long-term environment** – The future success of employment uses within Burlington’s M.T.S.A.s and the remaining Primary Growth Areas is 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. This requires a more strategic approach to planning, one that integrates planning with the City’s Economic Development Strategy. A place-based approach should allow for flexible planning frameworks, repurposing measures for older buildings and areas, and investment for mixed-use, co-working, incubators/accelerator facilities for start-up businesses, and opportunities for shared spaces. With this in mind, the primary objective of planning policies should be to create high-quality, mixed-use urban environments that offer access to higher-order transit services, a walkable and cyclable public realm, and services and amenities, including restaurants, cafés, shops, daycare facilities, arts and cultural activities, 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.
- **Encourage proactive planning** – It is recognized that, given the comprehensive nature of the O.P. review process and the structural changes in the economy and the nature of work, municipalities have traditionally been somewhat slow to adopt flexible land use frameworks to address the development opportunities and challenges identified in this report. Recent economic trends and industry disruptions, however, mandate that the City’s O.P., Secondary Plans, and zoning by-laws allow for opportunities, where appropriate, to encourage transformative change over the long term within M.T.S.A.s. This will ensure that businesses are able to effectively respond to the changing environment, new ways of working, and innovation capabilities. Recent trends show that employment spaces and facilities are increasingly demanding the ability to integrate different functions. For example, innovation parks and mixed-use spaces integrate research, institutions, start-ups, labs, office, co-working, and production space with recreational amenities and services.



Recommended Action: Proactively Plan for Office and Mixed-Use Development in S.G.A.s/M.T.S.A.s

- It is recommended that major office development be directed to the City's M.T.S.A.s that are served with existing or planned higher-order transit.
- An appropriate level of major office development should be targeted to complement residential development and other population-related functions to create complete communities. Furthermore, in cases where major office development is integrated with industrial uses, such uses should be directed within Employment Areas where such development cannot be easily accommodated within M.T.S.A.s due to parcel size constraints or specific circumstances related to land use compatibility, and/or site configuration.
- Infrastructure investment should be prioritized and accelerated where possible to facilitate development/redevelopment efforts across M.T.S.A.s with the strongest identified real-estate market opportunities.
- Planning and market studies, including pro formas, should be prepared to assess development feasibility opportunities and challenges for office development across M.T.S.A.s and the potential use of municipal financial incentives and other planning tools to help facilitate development.
- Development activity and corresponding population and employment growth should be monitored within M.T.S.A.s and the remaining Primary Growth Areas on a regular basis.

9.8 Plan for Employment Areas

9.8.1 Strategically Plan the City's Employment Areas

Policy Context: Employment Areas form a vital component of Burlington's land use structure and are an integral part of the local economic development potential of the City. Through the development of its Employment Area land base, Burlington is better positioned to build more balanced, complete, and competitive communities. Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the City. Accordingly, it is critical that Burlington's Employment Areas and other urban non-residential lands are planned in a manner that aims to promote economic competitiveness, attract employment growth, and maximize employment density and land utilization, where appropriate.



For the City to achieve its long-term economic development goals, Employment Areas need to continue to offer opportunities for growth and development. This includes accommodating a large share of the City's employment growth across a broad range of industry sectors.

Over the next three decades, the City is expected to accommodate steady employment growth in the remaining vacant lands within its Employment Areas and through further intensification. By 2051, it is anticipated that the City will have exhausted its remaining supply of vacant Employment Area lands. Given the potential negative impacts resulting from the inappropriate conversions (removals) of Employment Areas, it is recognized that there is a need to preserve such designated lands within the City of Burlington for employment uses. It is also recognized that, under some circumstances, an Employment Area removal may be justified for planning and economic reasons, provided such decisions are made using a systematic approach and methodology.

Recommended Action: Continue to Plan for the Development of the City's Designated Employment Areas

- The City of Burlington should continue to plan for the development (and ultimate buildout) of the City's designated urban Employment Areas.
- It is recommended that the City maintain an average density of 33 jobs per gross hectare when planning for new development in existing and future Employment Areas.
- It is recommended that the City of Burlington prepare an updated Employment Area strategy.

9.8.2 *Plan for Employment Uses Under a New Provincial Policy Framework*

Policy Context: As previously discussed in Chapter 2, under the new provincial definition of Employment Area, the City of Burlington, along with other Ontario municipalities, is required to plan for and protect industrial uses based on a more narrowly scoped definition of Employment Area and is limited to these uses, which are primarily industrial in nature, or other uses associated or ancillary to the primary use. As noted in Chapter 2, under the P.P.S., 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Lands that do not meet the Employment Area definition would not be subject to provincial



Employment Area protection policies and may allow opportunities for residential and other non-employment uses.^[74]

In light of the definition change of Employment Area, a key concern for Burlington will be its ability to provide an urban structure that will 1) protect the primary function of established Employment Area precincts in the City; 2) enhance functionality and provide support to primary employment uses within Employment Areas; and 3) provide sufficient lands and appropriate areas to accommodate non-industrial uses/sectors (e.g., training and education, places of assembly (e.g., banquet hall, convention or trade centre), wholesale trade, research and development, office and automotive service and repair centres, building materials sales (e.g., lumber sale yards, tile stores), etc.) that have traditionally been accommodated in Employment Areas as opposed to mixed-use commercial areas. Typically, these uses require one or more specific site attributes that are challenging to accommodate in a mixed-use commercial environment: ample on-site storage capabilities, buildings with high ceilings and loading docks, expansive parking areas and a buffer from residential neighbourhoods.

As a first step, the City of Burlington will need to implement changes to the uses permitted within its designated Employment Area to align with the revised definition of Employment Area in the *Planning Act*. While it is beyond the scope of this review to conduct a detailed analysis of the City's Employment Areas in accordance with recent provincial policy direction, provided below are a number of considerations with respect to items 1 to 3 mentioned above.

Recommended Action: Review Employment Designation Policies in the O.P. to Align with the Provincial Planning Definition

- It is recommended that a more detailed review of the City's Employment Areas be carried out through an Employment Area Strategy.
- More specifically, it is recommended that the City of Burlington revise the definition of Employment Area in the B.O.P. to align with the definition provided in the P.P.S., 2024. This alignment will ensure consistency and clarity in the interpretation and application of Employment Area policies. It is noted that the City's established Employment Areas accommodate a broad range of general

^[74] Provincial Planning Statement, 2024, definitions, p. 34.



and prestige industrial uses, as well as a variety of stand-alone office, retail, and institutional uses.

- To ensure that the City's Employment Areas remain functional, competitive, and attractive locations for businesses while supporting a diverse range of uses, the following considerations are recommended. It is noted that these recommendations are preliminary.

1) Protect Employment Areas within the Context of the Revised Provincial Policy Direction.

- **Determine permitted uses in Employment Areas** under the new *Planning Act* definition within existing and planned Employment Areas.
- **Identify non-conforming uses** by establishing policies that will permit the continuation of lawfully established uses such as stand-alone retail, commercial, office, and institutional uses.
- **Protect Employment Areas** to ensure that the lands in such areas are not eroded and the planned function of these areas is not undermined, in order to remain competitive over the long term. This includes both the occupied and vacant Employment Area land supply, including underutilized sites.
- **Develop localized evaluation criteria for Employment Area removal.** In addition to Employment Area removal criteria set out in subsection 2.8.2.5. of the P.P.S., 2024, consider establishing updated local criteria designed to protect established and planned Employment Areas. Such criteria would include, but would not be limited to, the following: site size, physical constraints, access, connectivity and configuration, land use compatibility issues, economic viability infrastructure, and local municipal interests. A key emphasis of the localized criteria relates to the quality of Employment Area lands. This approach recognizes that in certain circumstances an Employment Area removal may be recommended if determined that the local site attributes of the subject lands do not support a feasible long-term outcome for industrial-type development.



2) Enhance Functionality and Provide Support to Primary Employment Uses within Employment Areas.

- **Determine preferred locations for employment-supportive uses adjacent to Employment Areas.** While stand-alone retail uses are not permitted under the revised definition of Employment Areas, it should be recognized that accommodating an adequate mix of supportive uses adjacent to Employment Areas, such as retail and personal services, can strengthen such areas by providing amenities and services to employees and employers. Identifying such areas may involve the removal of specific lands within Employment Areas that currently serve this role, provided that such removals do not generate a meaningful reduction in the City's supply of Employment Area lands and do not undermine the function of established or planned Employment Areas.
- Ultimately, the intention of these employment-supportive uses (located within proximity of Employment Areas) should be to serve the needs of employers within the Employment Areas as opposed to the broader population. Accordingly, employment-supportive locations should be identified where services and amenities, such as restaurants, personal services, day care services, fitness centres, and hotels, can cluster together, potentially at gateway locations adjacent to or near Employment Areas. Ultimately, the planning and development of these services and amenities in conjunction with the primary Employment Area land uses can notably improve the quality of life for employees by offering them access to services and amenities before or after work, or over lunch.
- To align with the provincial planning context, consider including more defined policy direction in the City's B.O.P. to outline the goals and objectives related to employment-supportive uses of limited scale that are focused on serving businesses and employees in the Employment Areas. The City may also want to consider the introduction of more defined criteria or descriptions regarding the appropriate type, size, and location of employment-supportive uses at strategic and accessible locations within proximity to existing and future Employment Areas.



- In concert with this approach is to design Employment Areas that are more pedestrian-, bicycle-, and transit-friendly so that employees can easily access services and amenities, which will help reduce the number and duration of trips via private automobile.
- **Enhance Employment Areas** by encouraging priorities for making physical improvements to existing Employment Areas, where the need for such enhancements is identified. This could include opportunities to add or enhance existing elements, where applicable, such as open space/public-realm improvements, lighting, wayfinding/branding, trails, active transportation connections, transit access, and other types of hard infrastructure which help to make Employment Areas attractive places to work. Opportunities identified through this process could be incorporated into updated urban design policies for the City's Employment Areas.
- Additionally, the City should continue to implement measures to actively ensure the development of Employment Area lands. These measures may include, but would not be limited to, investor outreach, enabling incentives for development and enabling public-private partnerships in the development of industrial lands, etc.
- **Continue to explore opportunities to expedite servicing of designated Employment Areas.** A proactive approach should be developed to work with landowners to increase the number of sites that are "market ready." Market-ready sites are lands that are not only vacant and serviced but have landowner intent to progress the lands for entry into the market. There are a number of reasons why lands may not be market ready; for example, the landowner may not be willing or ready to sell the land or may be holding onto the land for future development or expansion. The City of Burlington is encouraged to consult with landowners to understand the opportunities and limitations of market-ready lands and identify strategies to address potential barriers to investment.
- It is recommended that the City consider establishing a target that sets out a minimum five-year supply of serviced Employment Area lands that are to be maintained and available at all times to meet market needs.



3) Ensure Sufficient Lands and Appropriate Locations are Provided for to Accommodate Demand for Non-Industrial Uses within the City.

- **Consider developing a transitional land use designation adjacent to Employment Areas**, in view of the evolving nature of Employment Areas within the context of the new *Planning Act* definition. The creation of a new employment land use designation for transitional lands adjacent to Employment Areas would provide greater opportunities to accommodate certain non-retail, non-industrial uses that would not be permitted under the new provincial Employment Area definition but that are also not typically accommodated in mixed-used commercial areas. For example, this may include certain small-scale retail operations, places of worship, daycares, funeral homes, recreational and entertainment facilities, self-storage facilities, and auto repair. Subject to identified long-term need and other local criteria, this proposed land use designation would potentially service a transition area between residential and industrial areas. These transitional uses would be ideally situated on the periphery of Employment Areas, on major roads, and may serve as a buffer between industrial uses and sensitive uses. Furthermore, this designation would provide commercial services for employees in the Employment Area, as well as the broader area without disrupting the Employment Area. A similar approach is taken in the City of Calgary Land Use By-Law to provide policies regarding the “Industrial Edge District.”
- **Provide lands to accommodate stand-alone office uses**, primarily where existing office uses are currently clustered. As previously noted in section 9.7, while major office uses will be directed to the City’s Mixed Use Intensification Areas, it is recognized that not all the demand for new office development will be accommodated in these areas. When reviewing the City’s Employment Areas, consideration should be given to the removal of established Employment Areas (potentially in gateway locations) which are occupied by office uses and buffered adjacent industrial areas. This would support additional clustering of stand-alone office uses, provided that such removals do not negatively impact the functionality and competitiveness of the City’s established



Employment Areas and do not significantly reduce the City's supply of Employment Area lands.

9.8.3 Explore Opportunities for Intensification of Employment Lands

Policy Context: Future redevelopment, expansion, and infill opportunities will continue to exist as the City's Employment Areas mature and evolve. Intensification potential on occupied and underutilized employment lands is not well understood, given uncertainties regarding the future intentions of existing landowners. Subsection 2.8.1 (d) of the P.P.S., 2024 encourages intensification of employment uses and compatible, compact, mixed-use development to support the achievement of complete communities.

Recommended Action: Encourage the Development and Intensification of Underutilized Employment Areas

- The City should promote and facilitate intensification/infill opportunities in existing Employment Areas.
- Opportunities for infill and redevelopment in mature industrial areas should be explored and studied.
- It is recommended the City work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assess the feasibility of development.
- Redevelopment opportunities on brownfield industrial sites should be explored.

9.9 Growth Monitoring

9.9.1 Growth Tracking and Growth Management Monitoring

Policy Context: The B.O.P., 2020 speaks to the importance of developing a comprehensive monitoring program to assess the adequacy of the policies of the Region of Halton R.O.P. and to measure their success in managing population and employment growth. These objectives are also reinforced in the former Region of Halton R.O.P.

In this regard, this review provides critical input to long-range planning by identifying future growth, land supply, and land demand, which ultimately informs a comprehensive policy framework to manage change over the planning horizon. Policies providing direction on plan monitoring and evaluation are required to regularly evaluate the



forecasts presented in this study (inclusive of housing and urban land supply) as implemented through the City's O.P.

Relevant policies should establish direction to undertake a regular review and update of the growth forecasts to ensure the City is providing direction for growth and change in a manner that is consistent with the P.P.S., 2024, including land use planning and growth management practices that are sustainable over the long-term planning horizon.

Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the City to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy, demographic, and economic factors that influence growth and change over the long-term planning horizon.

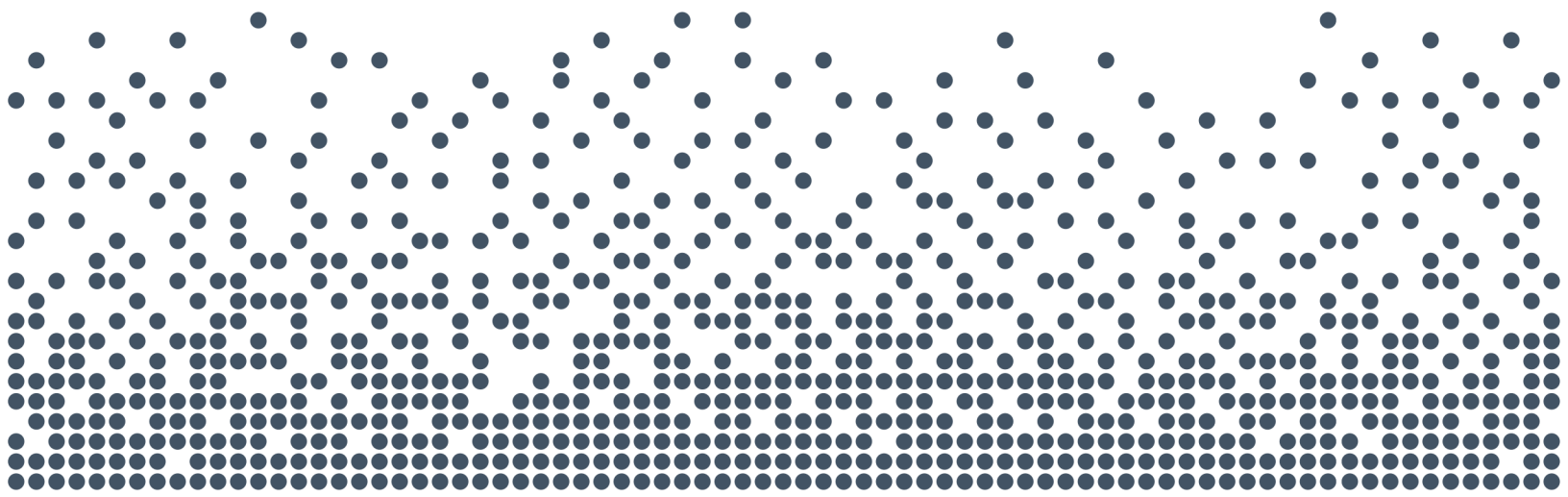
Recommended Action: Regularly Monitor and Benchmark the Development of the City's Community Areas and Employment Areas

- **A growth monitoring framework should be incorporated** to regularly assess housing supply, intensification targets, and greenfield development at regular intervals in coordination with concerned departments within the City and the Region for the provision of hard services and servicing allocation. It is recommended that enhanced growth monitoring systems be developed to provide a clearer understanding of recent growth trends as well as insights into the potential broad-reaching impacts of urban growth. Ultimately, such tools would generate greater growth management efficiencies within the City when responding to changes in real-estate market conditions, development pressures, and provincial planning policy direction.
- **Consider various tools for monitoring housing growth**, potentially including and not limited to comprehensive and interactive growth tracking/growth management models to monitor population, housing, and employment growth, intensification, greenfield development phasing, and density, as well as other performance measures and benchmarking at the planning policy area and neighbourhood level on an annual basis. It is recommended that the City update its existing growth tracking system, previously developed by Watson in 2016. It is noted that Watson has recently established a comprehensive web-based population, housing, and employment growth monitoring/management tool for several Ontario municipalities.



The City's Pipeline to Permit dashboard tracks where residential development is happening in the City, the recent trends in the built form of housing, and residential development tracking to the 2031 housing target. Building from the residential development tracking provided by the Pipeline to Permit Dashboard, an updated growth monitoring system would be designed to answer the following questions for the City of Burlington:

- What is the rate of recent population, housing, and employment growth in the City of Burlington? How has this changed over different time periods? How is actual population and employment growth tracking to the City's O.P. growth forecast?
- Where is population, housing and employment growth and change occurring in the City?
- What are the recent trends regarding the built form of housing (i.e., single detached, semi-detached (low density), townhouses (medium density), and apartments (high density), and non-residential development by sector and how do these trends differ by geographic area?



Appendices



Appendix A

Growth Projections Methodology



Appendix A: Growth Projections Methodology

Approach and Methodology

The population, household, and employment forecast methodology adopted for this study utilizes a combined forecasting approach that incorporates both the traditional “top-down” cohort-survival forecast methodology (i.e., population by age-cohort) and a “bottom-up” household formation methodology. This combined approach is adopted to ensure that both regional economic/demographic trends and local housing market conditions are adequately assessed in developing the long-term growth potential for the City of Burlington.

A.1 Economic Base Model

Local/regional economic activities can be divided into two categories: those that are “export-based,” and those that are “community-based.” The export-based sector comprises industries (i.e., economic clusters) that produce goods that reach markets outside the community (e.g., agriculture and primary resources, manufacturing, research, and development). Export-based industries also provide services to temporary and second-home residents of the City of Burlington (hotels, restaurants, tourism-related sectors, colleges, and universities) or to businesses outside the region (specialized financial and professional, scientific, and technical services). Community-based industries produce services that primarily meet the needs of the residents in the City (retail, medical, primary and secondary education, and personal and government services). Ultimately, future permanent population and housing growth within the City of Burlington has been determined in large measure by the competitiveness of the export-based economy within the City and the surrounding market area.

On the other hand, population growth in the 65+ cohort will continue to be largely driven by the aging of the City’s existing population and, to a lesser extent, the attractiveness of the City to older adults and seniors through net migration.

A.2 Cohort-Survival Population and Household Forecast Methodology

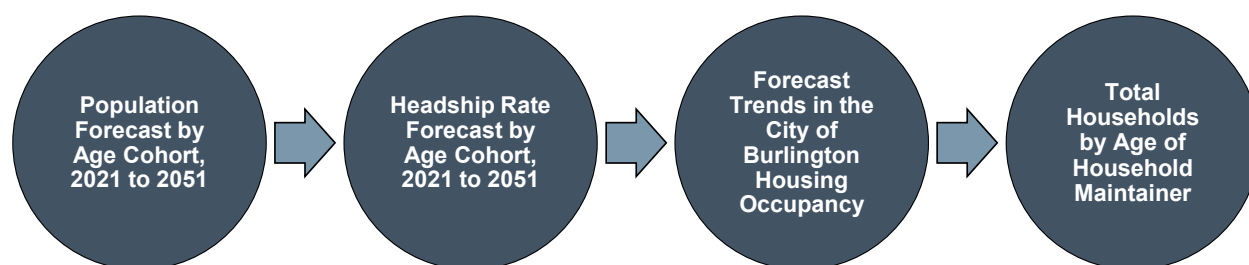
The cohort-survival population forecast methodology uses, as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added



(in-migration to the municipality, less out-migration, by age group). Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy. Total housing growth is generated from the population forecast by major age group using a headship rate forecast.

A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e., cohort). Average headship rates do not tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e., 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as the City of Burlington's population ages, the ratio of household maintainers is anticipated to increase. The average headship rate represents the inverse of the average number of persons per unit (P.P.U.). As the City's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants increases. Figure A-1 summarizes the cohort-survival forecast methodology, which is a provincially accepted approach to projecting population and the corresponding total household formation.^[75]

Figure A-1
Cohort-Survival Population and Household Forecast Methodology



This forecasting approach has been developed in accordance with the Ontario Provincial Projection Methodology Guidelines and industry best practices.^[76] This approach focuses on the rate of historical housing construction in the City of Burlington

^[75] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements, 1995.

^[76] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements, 1995.



and the surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, housing units in the development process, and historical housing demand. Population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in P.P.U. over time within existing households.

A.3 Employment Forecast

The long-term employment growth potential for the City of Burlington has been developed from the labour force growth forecast, which considers both the rate and age structure of forecast labour force growth over the 2021 to 2051 planning horizon. A long-term employment growth forecast by major employment sector/category (i.e., primary, industrial, commercial, institutional, work at home) was then established using the employment “activity rate” method.^[77]

When forecasting long-term employment, it is important to understand how employment growth in the City of Burlington by major employment category (i.e., industrial, commercial, and institutional) is impacted by forecast labour force and population growth. Population-related employment (i.e., retail, schools, services, and commercial) is generally automatically attracted to locations convenient to residents. Typically, as the population grows, the demand for population-related employment also increases, to service the needs of the local community. Forecast commercial and institutional activity rates have been based on historical activity rates and employment trends, and future commercial and institutional employment prospects within a local and regional context. Similar to population-related employment, home-based employment is also anticipated to generally increase in proportion to population growth.^[78]

Industrial and office commercial employment (export-based employment), on the other hand, is not closely linked to population growth. This type of employment tends to be more influenced by broader market conditions (i.e., economic competitiveness, transportation access, access to labour, and distance to employment markets) and local

^[77] An employment activity rate is defined as the number of jobs in a municipality divided by the number of residents.

^[78] Due to further advancements in telecommunications technology, it is anticipated that home-based employment activity rates may increase over the forecast period for the City.



site characteristics such as servicing capacity, highway access and exposure, site size/ configuration, physical conditions, and site location within existing and future Employment Areas throughout Burlington and the surrounding market area. As such, industrial employment (employment lands employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

- Macro-economic trends influencing industrial and employment lands development (i.e., industrial and office employment) within Burlington and the surrounding market area;
- Historical employment trends (i.e., review of established and emerging employment clusters), non-residential construction activity, and recent employment land absorption rates; and
- The availability of serviced industrial and employment land supply (i.e., shovel-ready industrial and employment lands) and future planned greenfield development opportunities on vacant designated industrial and employment lands within Burlington and the surrounding market area.

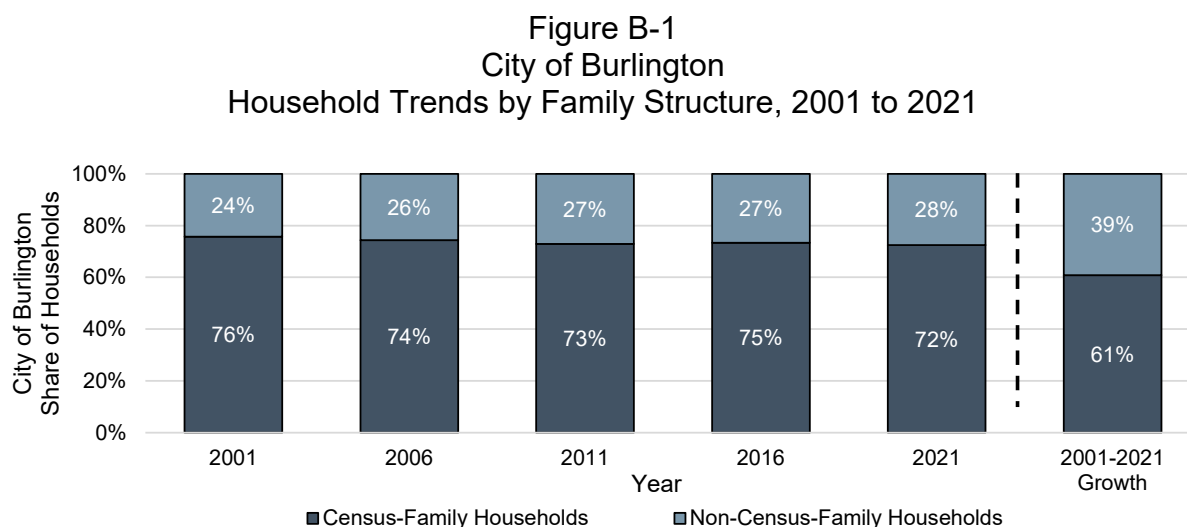


Appendix B

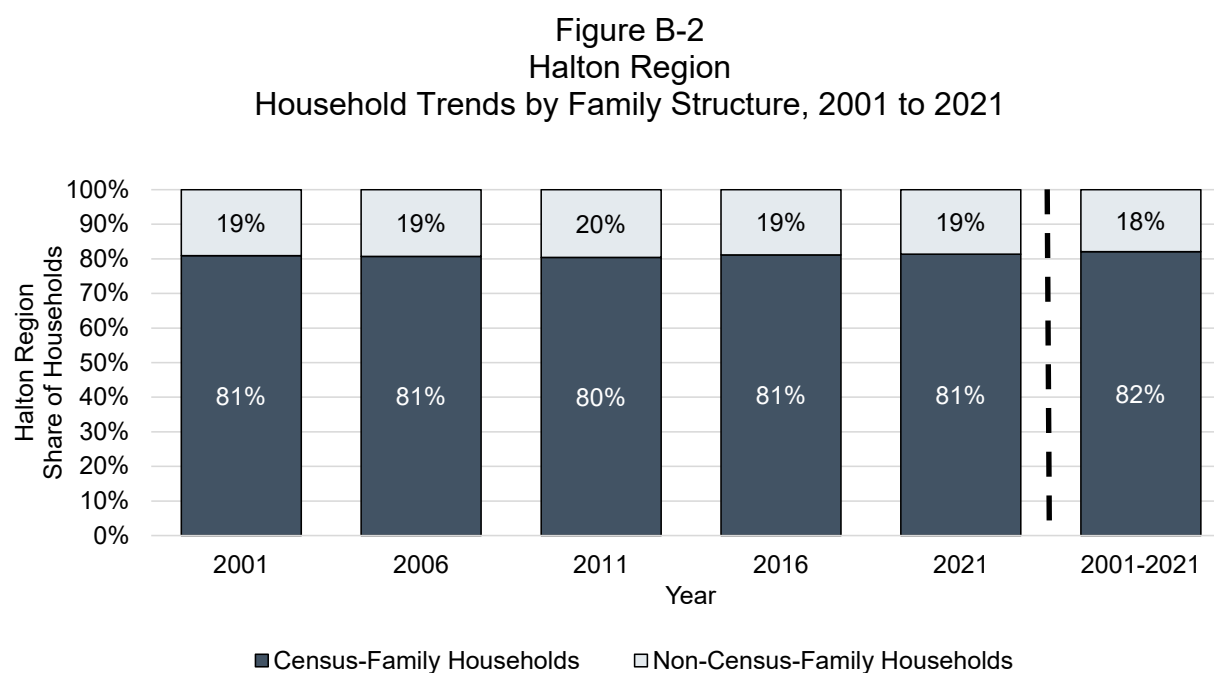
Household Profiling and Trends



Appendix B: Household Profiling and Trends



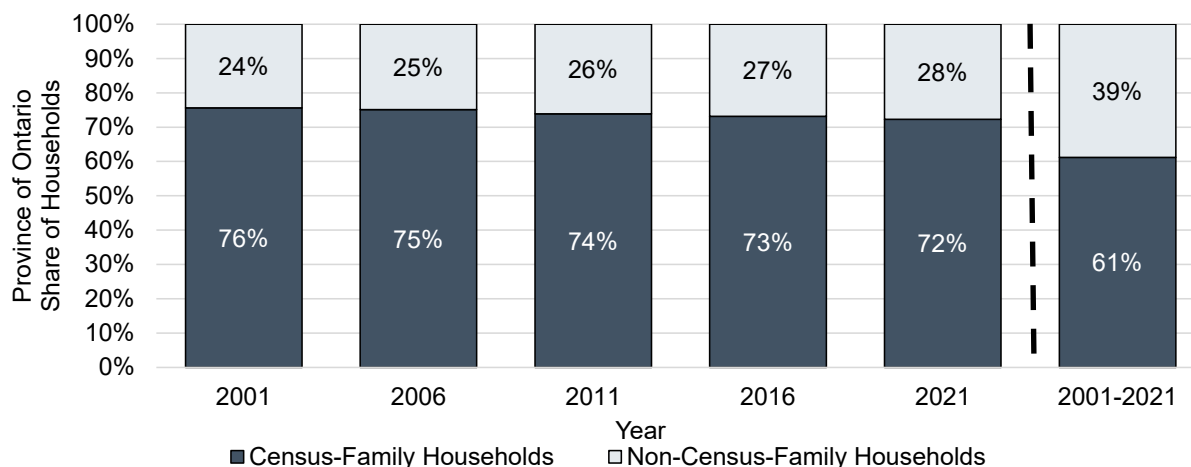
Source: Derived from 2001 to 2021 Statistics Canada Census data by Watson & Associates Economists Ltd.



Source: Derived from 2001 to 2021 Statistics Canada Census data by Watson & Associates Economists Ltd.

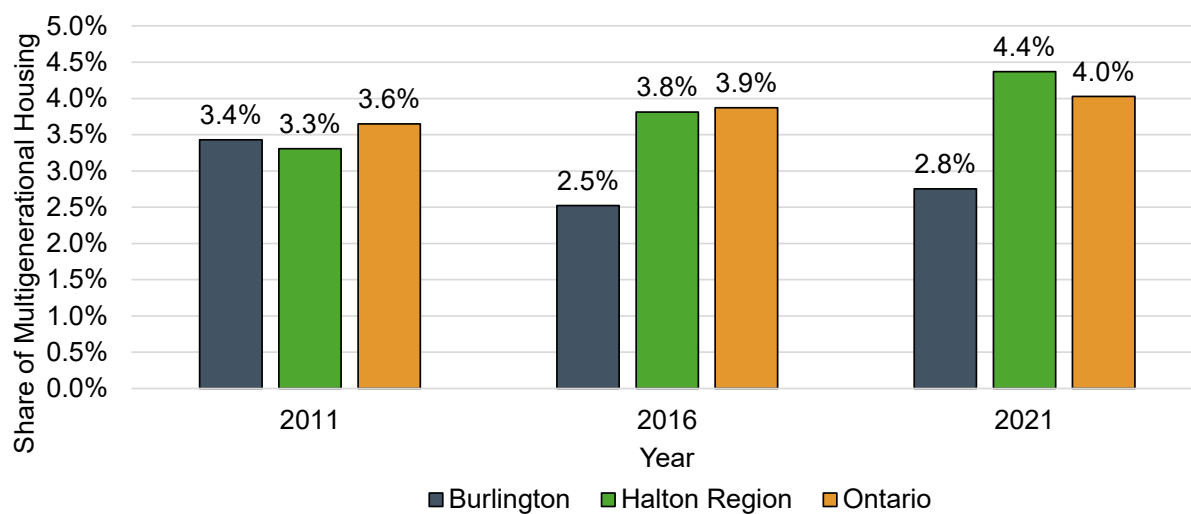


Figure B-3
Province of Ontario
Household Trends by Family Structure, 2001 to 2021



Source: Derived from 2001 to 2021 Statistics Canada Census data by Watson & Associates Economists Ltd.

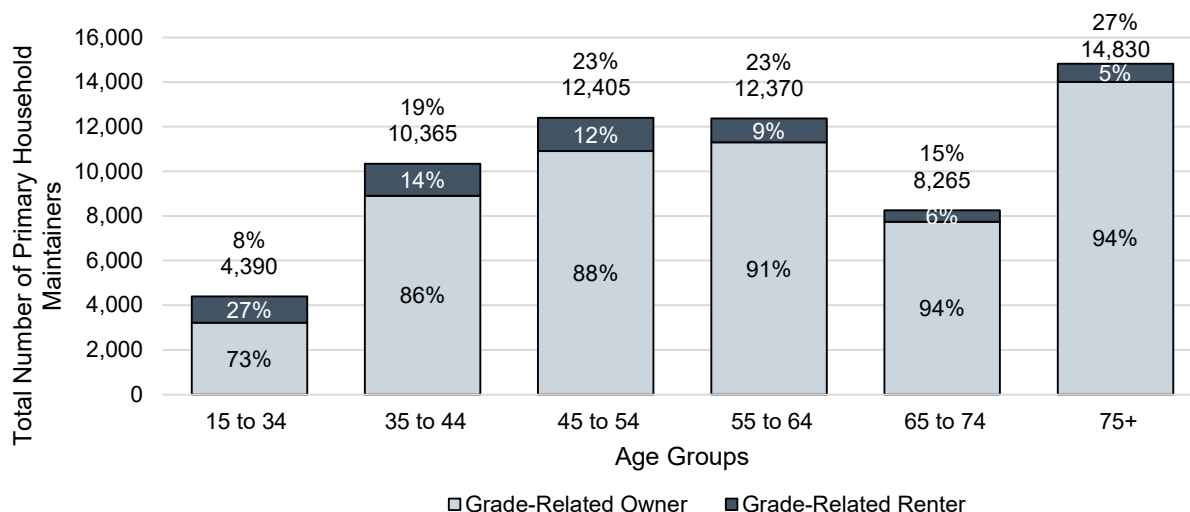
Figure B-4
Multigenerational Households, 2011 to 2021



Source: Derived from 2011 to 2021 Statistics Canada Census data by Watson & Associates Economists Ltd.



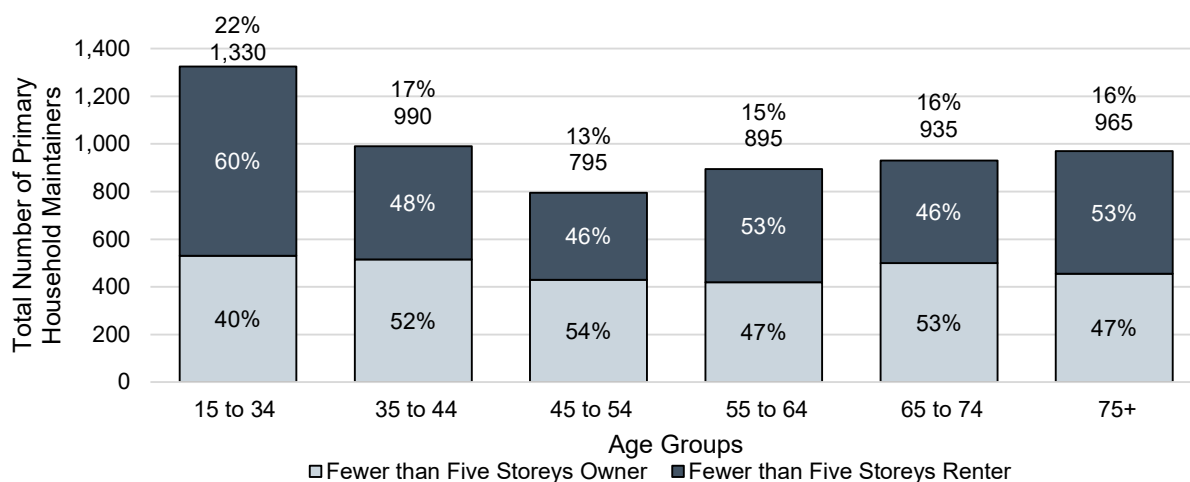
Figure B-6
City of Burlington
Grade-Related Housing by Age of Primary Maintainer and Tenure, 2021



Note: "Grade related" includes singles and semi-detached houses, townhouses, apartments in duplexes, and other single detached dwellings.

Source: Statistics Canada custom data order and Table 98-10-0231-01, summarized by Watson & Associates Economists Ltd.

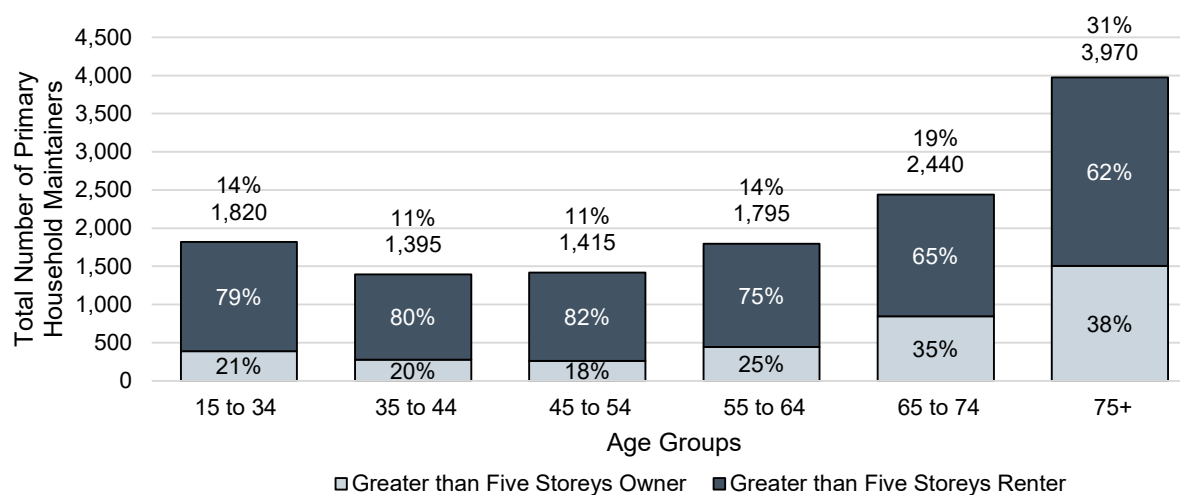
Figure B-7
City of Burlington
High-Density Housing (Fewer than Five Storeys)
by Age of Primary Maintainer and Tenure, 2021



Source: Statistics Canada custom data order and Table 98-10-0231-01, summarized by Watson & Associates Economists Ltd.



Figure B-8
City of Burlington
High-Density Housing (Greater than Five Storeys)
by Age of Primary Maintainer and Tenure, 2021



Source: Statistics Canada custom data order and Table 98-10-0231-01, summarized by Watson & Associates Economists Ltd.



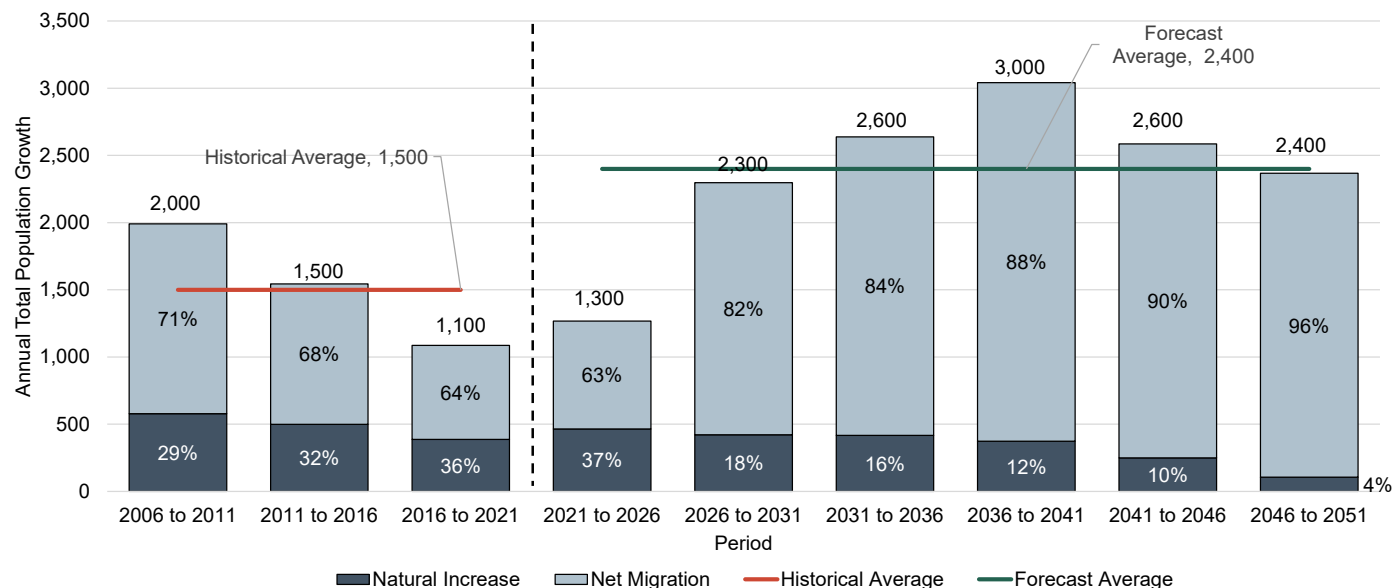
Appendix C

Components of Population Growth



Appendix C: Components of Population Growth

Figure C-1
City of Burlington
Components of Population Growth, 2006 to 2051



Component	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
Natural Increase	580	500	390	470	420	420	370	250	110
Net Migration	1,410	1,050	700	800	1,880	2,220	2,670	2,340	2,260
Population Growth	1,990	1,550	1,090	1,270	2,300	2,640	3,040	2,590	2,370

Note: Figures have been rounded and may not add up precisely. Population figures include net Census undercount.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure C-2
City of Burlington
Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	2,600	3,100	2,500	1,600	3,600	4,400	5,400	4,800	4,800
20-34	1,600	-200	600	700	1,700	1,800	2,200	1,900	1,900
35-44	1,200	1,900	2,400	1,700	4,000	4,600	5,500	4,700	4,700
45-54	400	300	200	300	800	900	1,000	900	900
55-74	900	-300	-1,500	-300	-700	-500	-600	-500	-400
75+	500	400	-700	0	0	100	0	0	0
Total	7,100	5,200	3,500	4,000	9,500	11,300	13,500	11,800	11,900

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure C-3
City of Burlington
Share of Net Migration by Age Cohort, 2006 to 2051

Cohort	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
0-19	37%	59%	71%	39%	38%	39%	40%	40%	41%
20-34	22%	-3%	17%	19%	18%	16%	17%	16%	16%
35-44	17%	37%	69%	42%	42%	41%	40%	40%	40%
45-54	5%	6%	5%	8%	8%	8%	7%	7%	7%
55-74	12%	-6%	-44%	-8%	-7%	-5%	-4%	-4%	-4%
75+	7%	8%	-19%	1%	0%	1%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure C-4
City of Burlington
Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	41,400	41,900	42,200	41,900	40,100	40,700	42,200	45,300	47,500	48,300
20-34	31,700	32,400	32,400	32,700	32,700	33,300	33,400	33,300	33,600	35,100
35-44	28,100	26,200	26,000	26,200	26,400	28,500	31,300	33,700	33,600	32,800
45-54	25,000	28,700	28,500	27,400	27,500	28,700	31,000	33,800	37,000	38,900
55-64	19,400	21,900	24,300	26,400	27,100	26,500	26,600	28,000	30,300	33,100
65-74	13,000	15,400	18,600	20,000	21,900	24,900	25,500	25,000	25,300	26,700
75+	12,500	14,500	16,900	19,600	24,700	29,400	35,200	41,300	46,100	50,300
Total	171,100	181,000	188,800	194,200	200,500	212,000	225,200	240,400	253,300	265,200

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.

Figure C-5
City of Burlington
Share of Population by Age Cohort, 2006 to 2051

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
0-19	24%	23%	22%	22%	20%	19%	19%	19%	19%	18%
20-34	19%	18%	17%	17%	16%	16%	15%	14%	13%	13%
35-44	16%	14%	14%	13%	13%	13%	14%	14%	13%	12%
45-54	15%	16%	15%	14%	14%	14%	14%	14%	15%	15%
55-64	11%	12%	13%	14%	14%	12%	12%	12%	12%	12%
65-74	8%	8%	10%	10%	11%	12%	11%	10%	10%	10%
75+	7%	8%	9%	10%	12%	14%	16%	17%	18%	19%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures include net Census undercount and have been rounded.

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Appendix D

Persons Per Unit



Appendix D: Persons Per Unit

Figure D-1
City of Burlington
Persons Per Unit (2021 Census Data)

Age of Dwelling	Singles and Semi-Detached						25-Year Adjusted Average ^[3]
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total	
1-5				2.747	4.647	3.214	
6-10		1.467	1.882	3.578	4.568	3.473	
11-15			2.182	3.451	4.364	3.520	
16-20			2.160	3.332	4.225	3.380	
20-25			1.833	3.097	4.077	3.099	3.378
25-35				3.074	3.837	3.072	
35+		1.563	1.927	2.796	3.620	2.811	
Total	1.667	1.571	1.948	2.934	3.861	2.958	

Age of Dwelling	Medium Density ^[1]						25-Year Adjusted Average ^[3]
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total	
1-5		1.517	2.227	3.260		2.274	
6-10			2.074	2.610		2.319	
11-15			2.125	2.850		2.656	
16-20			1.944	2.680		2.516	
20-25			1.937	2.680		2.479	2.431
25-35			1.814	2.540		2.269	
35+		1.395	1.902	2.640	3.944	2.450	
Total	0.444	1.432	1.959	2.672	4.000	2.454	

Age of Dwelling	High Density ^[2]						25-Year Adjusted Average ^[3]
	< 1 BR	1 BR	2 BR	3/4 BR	5+ BR	Total	
1-5		1.375	1.755	2.154		1.562	
6-10		1.320	1.677			1.519	
11-15		1.163	1.675	2.167		1.515	
16-20		1.400	1.667	3.250		1.662	
20-25		1.271	1.691	1.846		1.585	1.614
25-35		1.370	1.710	2.643		1.630	
35+	1.167	1.286	1.780	2.394		1.644	
Total	1.227	1.303	1.742	2.415		1.615	

^[1] Includes townhouses and apartments in duplexes.

^[2] Includes bachelor, 1 bedroom and 2 bedroom+ apartments.

^[3] Adjusted based on historical trends.

Notes: Does not include Statistics Canada data classified as "Other." BR means bedroom.

Source: Statistics Canada custom order data, summarized by Watson & Associates Economists Ltd.



Appendix E

Headship Rates



Appendix E: Headship Rates

Figure E-1
City of Burlington
Headship Rates, 2006 to 2051

Age Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051
15-24	0.04392	0.03382	0.02637	0.02138	0.02138	0.02138	0.02138	0.02138	0.02138	0.02138
25-34	0.38291	0.37198	0.35103	0.32535	0.32535	0.32535	0.32535	0.32535	0.32535	0.32535
35-44	0.49857	0.51034	0.49660	0.48632	0.48632	0.48632	0.48632	0.48632	0.48632	0.48632
45-54	0.55034	0.55993	0.55236	0.53427	0.53427	0.53427	0.53427	0.53427	0.53427	0.53427
55-64	0.55391	0.56090	0.57177	0.57109	0.57109	0.57109	0.57109	0.57109	0.57109	0.57109
65-74	0.60670	0.59280	0.59238	0.58133	0.58133	0.58133	0.58133	0.58133	0.58133	0.58133
75+	0.60822	0.62615	0.57740	0.58770	0.58770	0.58770	0.58770	0.58770	0.58770	0.58770
Total	0.36968	0.37990	0.37815	0.37687	0.38768	0.39544	0.40045	0.40318	0.40598	0.40956

Source: 2006 to 2021 derived from Statistics Canada data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Appendix F

Housing Units in Active Development Approvals Process



Appendix F: Housing Units in Active Development Approvals Process

Figure F-1
City of Burlington
Housing Units in Active Development Approvals Process

Stage in Process	Low Density ^[1]	Medium Density ^[2]	High Density ^[3]	Total Units
Under Review	24	221	5,993	6,238
Appealed to Ontario Land Tribunal	914	0	1,555	2,469
Waiting for Site Plan Approval	0	72	5,290	5,362
Planning Approval	631	519	5,294	6,444
Total	1,569	812	18,132	20,513

^[1] Includes single and semi-detached dwellings.

^[2] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, and stacked townhouses.

Source: Data from the City of Burlington Pipeline to Permit tracker as of December 18, 2024, summarized by Watson & Associates Economists Ltd.



Appendix G

City-wide Population, Housing and Employment



Appendix G: City-wide Population, Housing and Employment

Figure G-1
City of Burlington
Population and Housing Summary

Year		Population (Including Census Undercount) ^[1]	Population (Excluding Census Undercount)	Institutional Population (Excluding Census Undercount)	Population Excluding Institutional Population (Excluding Census Undercount)	Low- Density ^[2] Housing Units	Medium- Density ^[3] Housing Units	High- Density ^[4] Housing Units	Other	Total Households	Persons Per Unit with Undercount	Persons Per Unit without Undercount
Historical	Mid-2006	171,100	164,400	700	163,700	36,540	12,320	14,250	70	63,180	2.71	2.60
	Mid-2011	181,000	175,800	800	175,000	39,190	13,710	15,820	70	68,790	2.63	2.56
	Mid-2016	188,800	183,300	1,400	181,900	39,860	14,090	17,260	170	71,380	2.65	2.57
	Mid-2021	194,200	186,900	1,500	185,400	39,890	14,430	18,740	130	73,190	2.65	2.56
Forecast	Mid-2026	200,500	193,000	1,600	191,400	40,390	15,020	22,210	130	77,750	2.58	2.48
	Mid-2031	212,000	204,100	1,700	202,400	40,950	15,630	27,140	130	83,850	2.53	2.43
	Mid-2036	255,200	216,800	1,800	215,000	41,490	16,330	32,250	130	90,200	2.50	2.40
	Mid-2041	240,400	231,400	1,900	229,500	42,030	17,130	37,620	130	96,910	2.48	2.39
	Mid-2046	253,300	243,900	2,000	241,800	42,440	17,900	42,360	130	102,830	2.46	2.37
	Mid-2051	265,200	255,300	2,100	253,100	42,790	18,710	46,960	130	108,590	2.44	2.35
Incremental	Mid-2006 to Mid-2011	9,900	11,400	100	11,300	2,650	1,390	1,570	0	5,610		
	Mid-2011 to Mid-2016	7,800	7,500	600	6,900	670	380	1,440	100	2,590		
	Mid-2016 to Mid-2021	5,400	3,300	100	3,500	30	340	1,480	-50	1,810		
	Mid-2021 to Mid-2026	6,300	6,100	100	6,000	500	590	3,470	0	4,570		
	Mid-2021 to Mid-2031	17,800	17,200	100	17,000	1,060	1,200	8,400	0	10,670		
	Mid-2021 to Mid-2036	31,000	29,900	100	29,600	1,600	1,900	13,510	0	17,020		
	Mid-2021 to Mid-2041	46,200	44,500	100	44,100	2,140	2,700	18,880	0	23,650		
	Mid-2021 to Mid-2046	59,100	57,000	100	56,400	2,550	3,470	23,620	0	29,650		
	Mid-2021 to Mid-2051	71,000	68,400	100	67,700	2,900	4,280	28,220	0	35,400		

^[1] Population includes net Census undercount estimated at approximately 3.9%.
^[2] Includes single detached and semi-detached dwellings.
^[3] Includes row townhouses, back-to-back townhouses, and apartments in duplexes.
^[4] Includes stacked townhouses, and bachelor, 1-bedroom, and 2-bedroom+ apartment units.
Note: Figures may not add precisely due to rounding.
Source: 2006 to 2021 derived from Statistics Canada Census data; 2026 to 2051 forecast by Watson & Associates Economists Ltd.



Figure G-2
City of Burlington
Employment Summary (Activity Rates)

-	Population (Excluding Census Undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. ^[2]	Total Employment
Mid-2011	175,800	0.001	0.038	0.137	0.213	0.084	0.046	0.519
Mid-2016	183,300	0.002	0.045	0.136	0.202	0.089	0.047	0.521
Mid-2024	188,700	0.002	0.057	0.139	0.207	0.090	0.047	0.543
Mid-2026	193,000	0.002	0.057	0.138	0.206	0.090	0.047	0.539
Mid-2031	204,100	0.002	0.056	0.134	0.203	0.089	0.046	0.529
Mid-2036	216,800	0.002	0.056	0.129	0.200	0.087	0.045	0.518
Mid-2041	231,400	0.001	0.055	0.123	0.198	0.086	0.044	0.507
Mid-2046	243,900	0.001	0.054	0.118	0.195	0.084	0.043	0.497
Mid-2051	255,300	0.001	0.054	0.115	0.192	0.083	0.043	0.487
Total Incremental								
2011-2016	7,500	0.001	0.007	-0.001	-0.010	0.005	0.001	0.002
2016-2024	5,400	0.000	0.013	0.004	0.004	0.002	0.000	0.022
2024-2026	4,400	-0.001	0.000	-0.001	-0.001	-0.001	0.000	-0.003
2024-2031	15,400	0.000	-0.001	-0.005	-0.004	-0.002	-0.001	-0.013
2024-2036	28,100	0.000	-0.002	-0.011	-0.007	-0.003	-0.002	-0.024
2024-2041	42,700	0.000	-0.002	-0.017	-0.009	-0.005	-0.003	-0.036
2024-2046	55,200	0.000	-0.003	-0.021	-0.012	-0.006	-0.004	-0.046
2024-2051	66,600	0.000	-0.003	-0.025	-0.015	-0.007	-0.005	-0.055
Annual Average Incremental								
2011-2016	1,500	0.000	0.001	0.000	-0.002	0.001	0.000	1.86%
2016-2024	675	0.000	0.003	0.001	0.001	0.000	0.000	-0.39%
2024-2026	2,200	0.000	0.000	0.000	0.000	0.000	0.000	-0.06%
2024-2031	2,200	0.000	0.000	-0.001	0.000	0.000	0.000	-0.002
2024-2036	2,340	0.000	0.000	-0.001	0.000	0.000	0.000	-0.002
2024-2041	2,510	0.000	0.000	-0.001	0.000	0.000	0.000	-0.002
2024-2046	2,510	0.000	0.000	-0.001	0.000	0.000	0.000	-0.002
2011-2016	2,470	0.000	0.000	-0.001	0.000	0.000	0.000	-0.002



Figure G-2 (Continued)
City of Burlington
Employment Summary (Employment)

-	Population (Excluding Census Undercount) ^[1]	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	N.F.P.O.W. ^[2]	Total Employment
Mid-2011	175,800	260	6,630	24,010	37,400	14,740	8,160	91,180
Mid-2016	183,300	440	8,170	24,850	37,100	16,270	8,670	95,490
Mid-2024	188,700	340	10,800	26,240	39,030	17,070	8,870	102,340
Mid-2026	193,000	340	11,000	26,670	39,720	17,360	9,010	104,120
Mid-2031	204,100	340	11,500	27,310	41,440	18,070	9,350	108,030
Mid-2036	216,800	340	12,070	27,870	43,430	18,890	9,760	112,370
Mid-2041	231,400	340	12,740	28,360	45,730	19,850	10,220	117,250
Mid-2046	243,900	340	13,270	28,820	47,520	20,580	10,570	121,100
Mid-2051	255,300	340	13,730	29,240	49,050	21,190	10,850	124,390
Total Incremental								
2011-2016	7,500	180	1,540	850	-300	1,530	520	4,310
2016-2024	5,400	-100	2,630	1,390	1,930	800	200	6,850
2024-2026	4,400	0	200	430	690	290	140	1,750
2024-2031	15,400	0	700	1,070	2,410	1,000	490	5,670
2024-2036	28,100	0	1,280	1,620	4,400	1,820	890	10,010
2024-2041	42,700	0	1,940	2,120	6,700	2,780	1,350	14,900
2024-2046	55,200	0	2,470	2,580	8,500	3,510	1,700	18,760
2024-2051	66,600	0	2,930	3,000	10,030	4,120	1,980	22,050
Annual Average Incremental								
2011-2016	1,500	36	308	170	-60	306	104	862
2016-2024	675	-13	329	174	241	100	25	856
2024-2026	2,200	0	100	215	345	145	70	875
2024-2031	2,200	0	100	153	344	143	70	810
2024-2036	2,340	0	107	135	367	152	74	834
2024-2041	2,520	0	114	125	394	164	79	876
2024-2046	2,510	0	112	117	386	160	77	853
2024-2051	2,470	0	109	111	371	153	73	817

Notes associated with Figure G-2:

^[1] Population adjusted to account for the net Census undercount estimated at approximately 3.9%.

^[2] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees 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."

Source: Historical data derived from Statistics Canada Place of Work data; forecast prepared by Watson & Associates Economists Ltd.



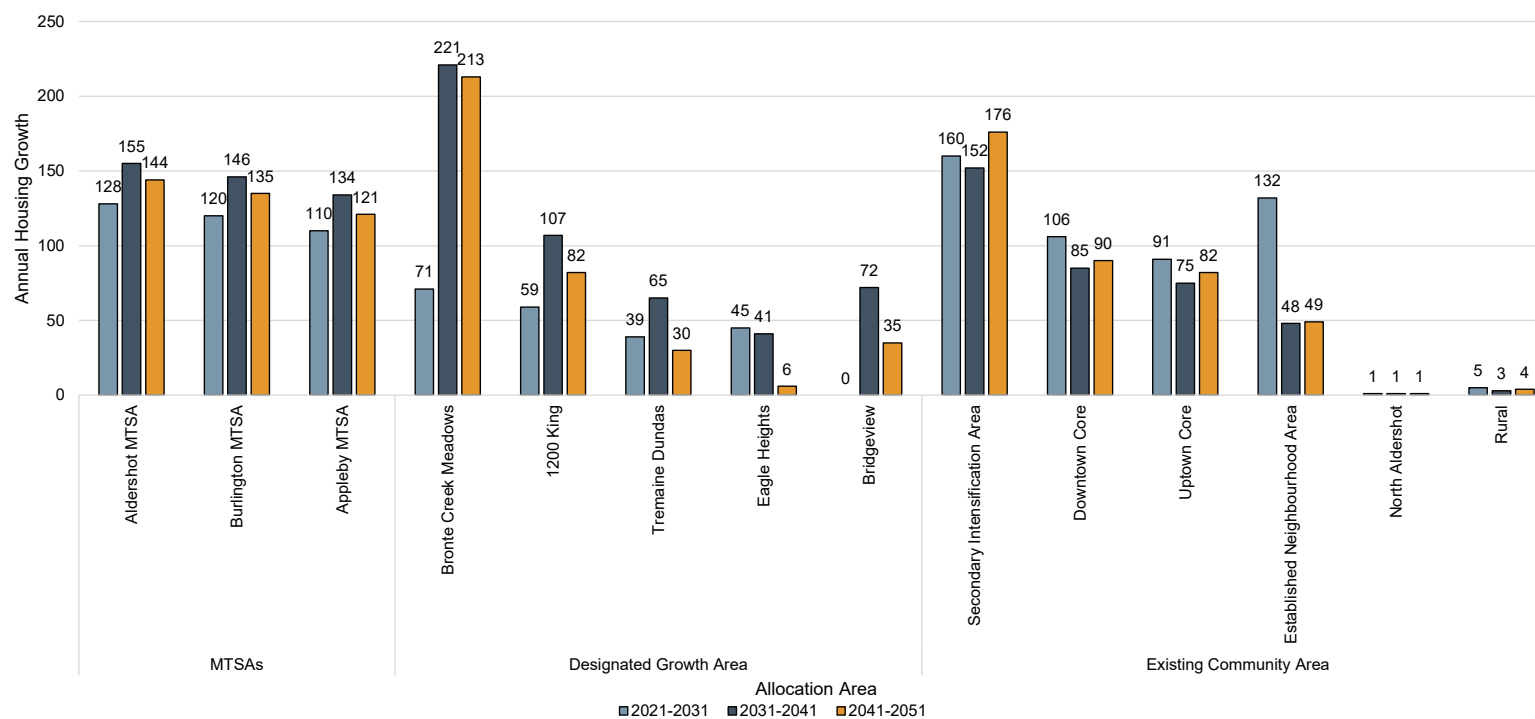
Appendix H

City of Burlington Population and Housing Allocations



Appendix H: City of Burlington Population and Housing Allocations

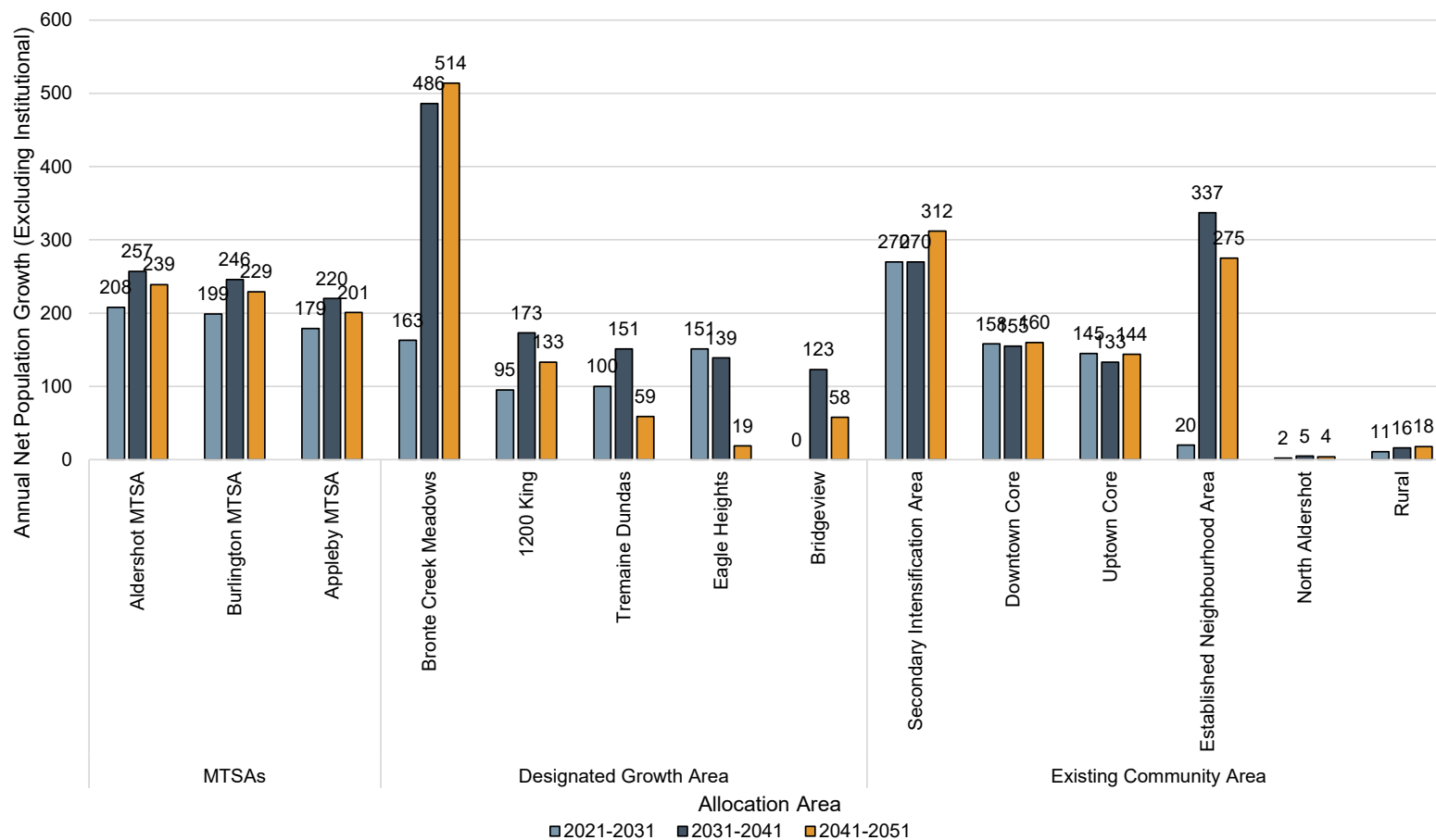
Figure H-1
City of Burlington
Annual Housing Growth by Allocation Area, 2021 to 2051



Source: Watson & Associates Economists Ltd.



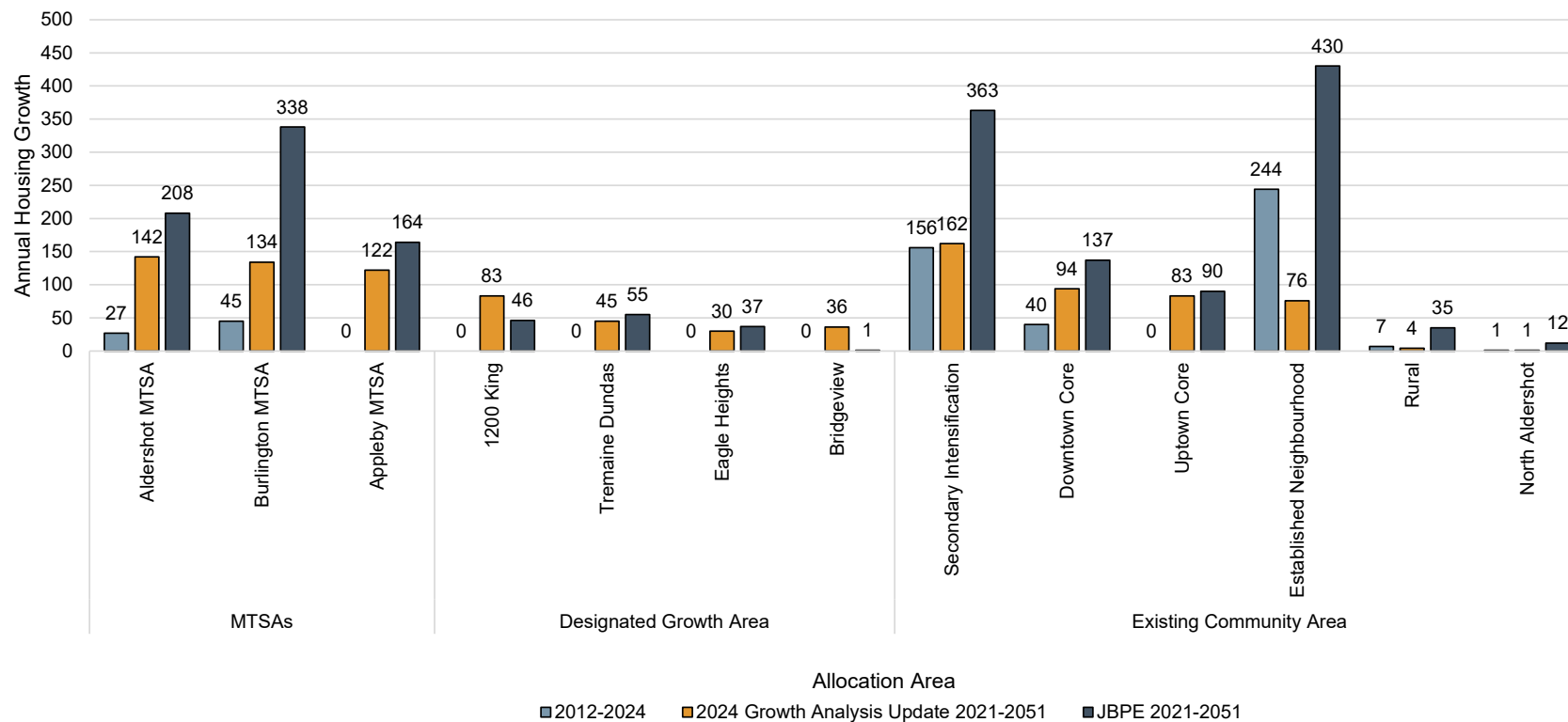
Figure H-2
City of Burlington
Annual Net Population Growth (Excluding Institutional) by Allocation Area, 2021 to 2051



Source: Watson & Associates Economists Ltd.



Figure H-3
City of Burlington
Annual Housing Growth by Allocation Area Comparison, 2021 to 2051



Note: Figures may not sum precisely due to rounding.

Source: Historical derived from City of Burlington building permit data, 2011 to 2021, Halton Region Joint Best Planning Estimates, and 2051 forecast by Watson & Associates Economists Ltd.

Figure H-4
City of Burlington
Incremental Housing Growth by Allocation Area, 2021 to 2051

	Development Location	Timing	Single & Semi-Detached	Multiples ^[1]	Apartments ^[2]	Total Residential Units	Net Population Including Institutional
Downtown Core	Total	2021 - 2026	0	20	580	610	900
		2021 - 2031	0	40	1,020	1,060	1,600
		2021 - 2036	0	60	1,420	1,480	2,300
		2021 - 2041	0	80	1,830	1,910	3,200
		2021 - 2046	0	90	2,270	2,360	4,000
		2021 - 2051	0	100	2,710	2,810	4,800
Uptown Core	Primary Intensification Area Inside Uptown	2021 - 2026	0	0	420	420	700
		2021 - 2031	0	0	630	630	1,000
		2021 - 2036	0	0	770	770	1,200
		2021 - 2041	0	0	850	850	1,400
		2021 - 2046	0	0	1,220	1,220	2,000
		2021 - 2051	0	0	1,600	1,600	2,600
	Uptown Outside Primary Primary Intensification Area	2021 - 2026	0	50	0	50	100
		2021 - 2031	0	70	210	280	400
		2021 - 2036	0	90	410	510	900
		2021 - 2041	0	110	700	810	1,400
		2021 - 2046	0	140	720	860	1,500
		2021 - 2051	0	180	720	890	1,600
	Total	2021 - 2026	0	50	420	470	700
		2021 - 2031	0	70	840	910	1,500
		2021 - 2036	0	90	1,180	1,280	2,100
		2021 - 2041	0	110	1,550	1,660	2,800
		2021 - 2046	0	140	1,940	2,080	3,500
		2021 - 2051	0	180	2,310	2,490	4,300
Secondary Intensification Area	Total	2021 - 2026	10	110	730	850	1,500
		2021 - 2031	10	190	1,390	1,600	2,700
		2021 - 2036	20	300	2,000	2,320	4,000
		2021 - 2041	20	430	2,660	3,110	5,500
		2021 - 2046	20	570	3,410	4,000	7,100
		2021 - 2051	30	720	4,120	4,870	8,600



Aldershot MTSA	Total	2021 - 2026	0	40	500	540	900
		2021 - 2031	0	60	1,220	1,280	2,100
		2021 - 2036	0	80	1,960	2,040	3,400
		2021 - 2041	0	110	2,720	2,830	4,700
		2021 - 2046	0	140	3,430	3,560	5,900
		2021 - 2051	0	170	4,090	4,270	7,100
Burlington MTSA	Total	2021 - 2026	0	50	390	440	700
		2021 - 2031	0	100	1,100	1,200	2,000
		2021 - 2036	0	130	1,780	1,910	3,200
		2021 - 2041	0	190	2,470	2,660	4,500
		2021 - 2046	0	240	3,120	3,350	5,700
		2021 - 2051	0	300	3,710	4,010	6,800
Appleby MTSA	Total	2021 - 2026	0	20	330	350	600
		2021 - 2031	0	50	1,050	1,100	1,800
		2021 - 2036	0	60	1,690	1,740	2,900
		2021 - 2041	0	80	2,360	2,440	4,100
		2021 - 2046	0	100	2,950	3,050	5,100
		2021 - 2051	0	130	3,520	3,650	6,100
1200 King	Total	2021 - 2026	0	0	0	0	0
		2021 - 2031	0	0	590	590	1,000
		2021 - 2036	0	0	1,170	1,170	1,900
		2021 - 2041	0	0	1,660	1,660	2,700
		2021 - 2046	0	0	2,080	2,080	3,400
		2021 - 2051	0	0	2,480	2,480	4,100
Bronte Creek Meadows	Total	2021 - 2026	0	0	0	0	0
		2021 - 2031	160	240	310	710	1,600
		2021 - 2036	350	540	860	1,760	4,000
		2021 - 2041	570	940	1,420	2,920	6,600
		2021 - 2046	850	1,340	1,770	3,970	9,100
		2021 - 2051	1,150	1,750	2,150	5,050	11,700
Eagle Heights	Total	2021 - 2026	180	0	0	180	600
		2021 - 2031	450	0	0	450	1,500
		2021 - 2036	660	0	0	660	2,200
		2021 - 2041	860	0	0	860	2,900
		2021 - 2046	910	0	0	910	3,100
		2021 - 2051	910	0	0	910	3,100



Bridgeview	Total	2021 - 2026	0	0	0	0	0
		2021 - 2031	0	0	0	0	0
		2021 - 2036	0	40	240	280	500
		2021 - 2041	0	70	650	720	1,200
		2021 - 2046	0	90	820	910	1,600
		2021 - 2051	0	90	980	1,070	1,800
Tremaine Road	Total	2021 - 2026	60	0	0	60	200
		2021 - 2031	150	120	130	390	1,000
		2021 - 2036	240	230	260	720	1,800
		2021 - 2041	330	300	420	1,040	2,500
		2021 - 2046	370	320	520	1,220	2,900
		2021 - 2051	370	340	620	1,340	3,100
Established Neighbourhood Area	Total	2021 - 2026	210	290	510	1,010	-100
		2021 - 2031	240	330	750	1,320	100
		2021 - 2036	250	360	950	1,560	1,300
		2021 - 2041	270	400	1,130	1,800	3,500
		2021 - 2046	280	440	1,320	2,040	5,100
		2021 - 2051	290	490	1,520	2,290	6,200
North Aldershot	Total	2021 - 2026	10	0	0	10	0
		2021 - 2031	10	0	0	10	0
		2021 - 2036	20	0	0	20	0
		2021 - 2041	20	0	0	20	100
		2021 - 2046	30	0	0	30	100
		2021 - 2051	30	0	0	30	100
Rural	Total	2021 - 2026	40	0	0	40	100
		2021 - 2031	50	0	0	50	100
		2021 - 2036	70	0	0	70	200
		2021 - 2041	80	0	0	80	300
		2021 - 2046	90	0	0	90	300
		2021 - 2051	120	0	0	120	400
City of Burlington	Total	2021 - 2026	510	590	3,460	4,560	6,100
		2021 - 2031	1,070	1,200	8,390	10,660	17,100
		2021 - 2036	1,610	1,900	13,500	17,010	29,800
		2021 - 2041	2,140	2,700	18,870	23,720	44,500
		2021 - 2046	2,560	3,470	23,610	29,640	56,900
		2021 - 2051	2,900	4,280	28,210	35,390	68,300

^[1] Includes townhouses and apartments in duplexes.
^[2] Includes bachelor, 1 bedroom and 2 bedroom+ apartments.
Note: Figures have been rounded and may not sum precisely.
Source: Watson & Associates Economists Ltd.

Exploring a Community Planning Permit System for Burlington's Employment Area

Key Directions Report

December 2025

www.getinvolvedburlington.ca/officialplan



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Introduction

The City's Employment Area plays a key role in supporting Burlington's economy by providing space for manufacturing, innovation, and business growth. This area is protected to ensure a steady supply of jobs and to maintain economic activity as the population grows. They are strategically located along major highways and transportation corridors to facilitate the efficient movement of goods and people. Employment Areas are geographically defined in Official Plans, and in Burlington, more than half of all jobs are concentrated within these areas.

The City of Burlington is proposing Official Plan Amendment (OPA) 7 to the Burlington Official Plan, 2020 to ensure Burlington's Official Plan stays current, clear, and consistent with Provincial planning direction. The proposed amendment will:

- Update employment area policy, in accordance with the *Planning Act*, and consistent with the Provincial Planning Statement, 2024 (PPS) including:
 - Update the Burlington Official Plan, 2020 Employment Area definition to align with the new "area of employment" definition in the *Planning Act*, and further expanded in the PPS, 2024
 - Align Employment Area land use permissions with the new provincial definition
 - Support the continuation of any lawfully established uses within the Employment Area that are excluded from the definition of "area of employment"
 - Update the Employment Area land conversion criteria;
- Minimize the impact on, and create certainty for, businesses and property owners; and
- Simplify and streamline land use policy for the City's Employment Area.

The City is exploring the use of a Community Planning Permit System (CPPS) in Burlington's Employment Area. Should the City proceed with a CPPS, the proposed OPA 7 includes policies to direct the City to prepare a CPPS for the Employment Area and develop enabling policies through a future amendment to the Official Plan in accordance with Regulation 173/16 of the *Planning Act*. The contents of required enabling policies in support of a CPPS are prescribed in O.Reg. 173/16 and must be adopted in an Official Plan prior to the approval of a CPP By-law. Once a CPPS is in place, permit applications within a Community Permit Planning Area are not subject to statutory/public consultation or notification requirements per the *Planning Act*. Therefore, up-front consultation on the enabling policies and throughout the development of a CPPS is imperative.

The purpose of this memo is:

- To outline what a CPPS is;
- To discuss why staff are exploring the use of the system for the City's Employment Area; and,
- To provide key directions for staff to guide the development of a CPPS for the Employment Area.

Where would the Community Planning Permit System Apply?

The City of Burlington is exploring the use of a CPPS for lands designated as the Employment Area across the city proposed in OPA 7, as shown in Figure 1, with the exception of Employment Area lands in the Major Transit Station Areas.

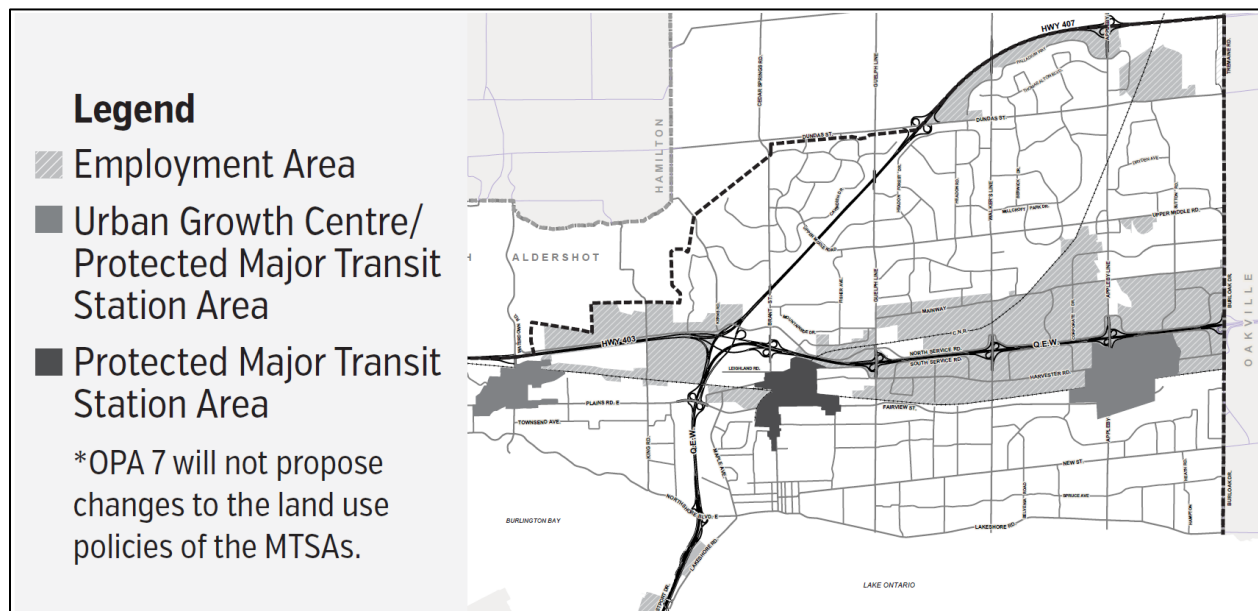


Figure 1: City of Burlington Employment Area

What is a Community Planning Permit System?

A Community Planning Permit System (CPPS) is a land use planning tool in the *Planning Act*, available to municipalities when planning for the future state of communities. Municipalities can apply a CPPS to all of their municipality or only to select areas and can tailor the CPPS to their local context and needs. The result of the implementation of a CPPS is a Community Planning Permit By-law (CPP By-law). A CPP By-law is a land use planning tool that combines Zoning By-law Amendments

(ZBA), Minor Variances (MV), and Site Plan Approval (SPA), into a single application and approval process.



Where a CPPS is in effect, development approval is determined by a proposal's conformity with the provisions of the CPP By-law including its development rules, standards and criteria, or any variations therein. A development permit may include conditions that must be met before or after its issuance.

The development permit consolidates the outcomes traditionally achieved through the ZBA, MV, and SPA approval process. The key distinction is the streamlined process with one application by one approval authority, which may either be City staff, a Planning Advisory Committee, or Council.

In comparison to ZBA and MV approval processes, there are no mandatory public meetings as part of the CPPS framework; however, many municipalities choose to incorporate public notification. For example, Burlington's approved-in-principle [CPP By-law \(May 2024\)](#) for the Major Transit Station Areas includes requirements for notice depending on the class of application.

Additionally, there are no third-party appeal rights for a CPP development application; only the applicant may appeal a decision. As part of the CPPS development process, all stakeholder consultation is front ended as the CPP By-law is drafted and established.

Some of the key components of a CPP By-law are as follows:

- Establishes requirements, such as setbacks for buildings, height of buildings, setbacks from the water, and parking requirements, which is similar to a Zoning By-law.
- Identifies development rules and requirements that are usually covered under separate processes (Minor Variance, Zoning, Site Plan), such as variations and development criteria.

- Ability to include details on site alteration, grading, tree removal, natural feature protection, shoreline controls, and floodplain and natural hazard limitations, due to its broader definition of “development”.
- Establishes permitted uses, discretionary uses and variations.
- Includes classes of approvals (e.g., Class 1 delegated to staff, Class 2 to Staff or Committee, and Class 3 to Council).
- Establishes a timeline of 45 days for the approval authority to make a decision on CPP development applications and outline any conditions of approval that may be imposed.
- Identifies the applicant as the only one who has the right to appeal a decision on a CPP development application to the Ontario Land Tribunal (OLT).
- Amendments to the relevant official plan policies and the CPP By-law are not permitted under the legislation within five years of passing the CPP By-law, unless it has been declared by Council resolution that such a request be permitted.
- Requires upfront public consultation, including enabling Official Plan policies and on the draft CPP By-law, but does not require mandatory public meetings on CPP development applications once enacted.
- Does not replace the need for a building permit or the need for consent/land subdivision or other requirements not covered by a CPPS which is required once a CPP development application is approved.

Why is the City considering the use of a Community Planning Permit System for Burlington’s Employment Area?

Since 2023, the City of Burlington has been exploring and developing a CPPS for Burlington’s three Major Transit Stations (MTSAs) located around each GO Station including Burlington GO, Aldershot GO, and Appleby GO. The process of developing a CPP By-law for the MTSAs builds upon many years of engagement with the public, landowners and development industry and is establishing a more streamlined regulatory framework that will help the City achieve its vision for complete communities within key intensification areas.

Through extensive engagement over several years with City Council, the public and the development industry, the CPPS is recognized as a tool that can streamline development applications while achieving good community outcomes. Leveraging the significant work already completed for the MTSAs, the City now has an opportunity to expand this approach to other areas that would benefit from similar process improvements, such as the Employment Area.

Through [Staff Report DGM 20-25](#), staff brought forward the City of Burlington Growth Analysis Review dated February 2025 (the full report can be accessed at www.getinvolvedburlington.ca/officialplan) which contained population, housing and employment projections to 2051, as well as growth management recommendations. Section 9.8.3 of the report recommends that the City explore opportunities and encourage the development and intensification of Employment Lands, including underutilized Employment Areas. The recommendation also advised that the City should promote intensification/infill opportunities in the existing Employment Area and explore redevelopment opportunities on brownfield industrial sites. This recommendation is also a key driver for the City to consider a CPPS for the Employment Area as the tool provides a more streamlined and flexible approach to encourage intensification of employment uses to support the achievement of complete communities.

A CPPS can provide numerous benefits to the City to implement the objectives of the Employment Area policies of the Official Plan to ensure opportunities to accommodate employment to the planning horizon of this Plan and beyond, including:

- **Creating a streamlined process:** Combines zoning, site plan and minor variance into one application and approval process with short approval timelines (45 days), ensuring timely decisions that support business investment and economic growth. Appendix A to this memo provides an overview of traditional planning process vs. a CPPS process.

Burlington's Employment Area is protected to encourage innovation, manufacturing, and ensure access to local jobs that contribute to a thriving, vibrant economy. These areas accommodate a diverse range of businesses and economic activities essential to the City's long-term prosperity. In order to promote economic competitiveness and attract investment, shortening timelines for employment related development approvals is critical. A CPPS presents an opportunity to streamline, provide flexibility, and reduce approval timelines, helping employment-based projects move more efficiently from application to building permit to construction.

- **More certainty in implementation and reduced likelihood of appeals:** Given that a CPP By-law clearly specifies the rules for development and any variations or discretionary uses that may be permitted, there is more certainty for the community, applicants and stakeholders on the type of development that will ultimately be approved.
- **Broader catchment of projects:** A CPPS includes a broader definition of "development" than Site Plan Control, which adds site alteration and vegetation

removal. Everything requires a permit unless otherwise exempt. The CPPS tool could capture these developments and provide a framework to guide permit requirements. Unlike other development applications, the City's Site Alteration and Private Tree By-laws continue to apply.

- **Provides a framework for delegation of approvals:** Delegation is based on classes of approvals, such as: Class 1: Standard – staff approval, Class 2: Variation – staff approval, Class 3: Variation requiring Committee or Council approval (above established thresholds). This could reduce staff effort for council reporting for applications that meet the requirements of the By-law or are within the identified staff variation. This provides a broader framework than a Zoning By-law, Site Plan and Minor Variance which each have different process timelines and approval bodies.
- **Ability to conditionally 'zone':** Under a Zoning By-law, only permitted uses are established, and any variations require a Zoning By-law Amendment or Minor Variance. Under a CPPS, precincts/districts include permitted uses, discretionary uses, and variations that will be considered (by staff and council). This allows the municipality to establish conditions in which additional permitted uses will be considered. Conditional zoning is still awaiting regulations and at this time is still not available to municipalities through a Zoning By-law.

Elements of a Community Planning Permit By-law

[Ontario Regulation \(O.Reg\) 173/16](#) under the *Planning Act* sets out the Official Plan enabling policies that must be in place before a CPP By-law can be enacted. These policies must identify the area where the CPPS will apply, outline any delegated approval authority, state the goals and objectives for creating the CPPS, and establish the types of development criteria and conditions that may be included within the CPP By-law, in accordance with the *Planning Act*. Once these enabling policies are in effect, the City may prepare a CPP By-law to implement the Official Plan through a CPPS.

In drafting a CPP By-law, O. Reg. 173/16 also prescribes specific provisions that must be included. These requirements distinguish the CPP By-law from a Zoning By-law by allowing Council to incorporate tools that are either not permitted, or only partially permitted under conventional planning process. Due to the broader authority, meaningful and early stakeholder engagement is important, especially during the development of Official Plan policies and throughout the drafting of the CPP By-law.

The CPP By-law will not restate Official Plan policies, rather it will translate them into clear requirements. These requirements will include varying degrees of flexibility to

support the effective implementation of Official Plan objectives, streamline approvals, and facilitate development.

The table below identifies these required elements alongside the corresponding sections of the Regulation.

Element	By-law Provisions Per Ontario Regulation 173/16
Decision-Making Criteria	<ul style="list-style-type: none"> - On considering the application, the council may, <ul style="list-style-type: none"> (a) refuse the application; (b) approve the application and issue a community planning permit with no conditions attached; (c) approve the application and require that conditions be met before issuing a community planning permit; (d) approve the application and issue a community planning permit with conditions attached; or (e) approve the application, require that conditions be met before issuing a community planning permit and, when the conditions have been met, issue a community planning permit with conditions attached. (O. Reg. 173/16, s. 10.9); - Set out any internal review procedures regarding decisions (O. Reg. 173/16, s. 4 (2) (d)); and, - Set out criteria that the council shall use in making decisions under subsection 10 (9). (O. Reg. 173/16, s. 4 (3) (e)).
Schedules/Maps	<ul style="list-style-type: none"> - Contain a description of the area to which the By-law applies, which shall be within the boundaries of an area identified in the official plan as a proposed community planning permit area. (O. Reg. 173/16, s. 4 (2) (a)).
Permitted/Prohibited Uses	<ul style="list-style-type: none"> - Set out and define the permitted uses of land. (O. Reg. 173/16, Section 4 (2) (b)); - Set out a list of classes of development or uses of land that may be permitted if the criteria set out in the official plan and in the by-law have been met. (O. Reg. 173/16, s. 4 (3) (d)); and, - Prohibit any development or change of use of land unless a community planning permit is obtained. (O. Reg. 173/16, s. 4 (3) (a)).
Exemptions	<ul style="list-style-type: none"> - Exempt any defined class of development or use of land from the requirement for a community planning permit. (O. Reg. 173/16, s. 4 (3) (c)).
Variances from Standards	<ul style="list-style-type: none"> - Set out a list of minimum and maximum standards for development. (O. Reg. 173/16, s. 4 (2) (c)); and,

	<ul style="list-style-type: none"> - Set out a range of possible variations from the standards referred to in clause (2) (c) that may be authorized in connection with the issuing of a community planning permit. (O. Reg. 173/16, s. 4 (3) (f)).
Conditions	<ul style="list-style-type: none"> - If the council wishes to impose conditions in making decisions under subsection 10 (9), outline the conditions. (O. Reg. 173/16, s. 4 (2) (i)); - A condition that is outlined for the purposes of clause (2) (i) shall, <ul style="list-style-type: none"> (a) be of a type that is permitted by the official plan; (b) be reasonable for and related to the appropriate use of the land; and (c) not conflict with federal and provincial statutes and regulations. (O. Reg. 173/16, s. 4 (4)); - Provide that an agreement referred to in paragraph 7 of subsection (5) may be amended as described in the By-law. (O. Reg. 173/16, s. 4 (2) (g)); and, - Provide that an agreement referred to in section 6 may be amended in the same way as an agreement referred to in paragraph 7 of subsection (5). (O. Reg. 173/16, s. 4 (2) (h)).

Key Takeaways from Jurisdictional Review of Best Practice

Based on a jurisdictional review of municipalities who either implemented a CPP By-laws or are in the process of developing a CPP By-law, this section of the memo provides a high-level overview of the various approaches taken to identify best practices. The City's objective was to understand how the CPPS functions as a land use planning tool in different contexts and explore its potential benefits for streamlining development approvals in an Employment Area. The findings of this review will inform key directions for guiding the scope, structure, and key elements of Burlington's CPP By-law.

Only a small number of municipalities have implemented a CPP By-law, of those; the Town of Gananoque, the City of Guelph, and the Town of Huntsville were chosen for review. In addition, the City of Ottawa is in the process of drafting a CPP By-law and was selected due to its focus on Employment Area lands. The full review and analysis can be found in Appendix B.

Based on the findings from the CPPS jurisdictional review, the Town of Gananoque and the Town of Huntsville demonstrate how a CPPS can replace traditional zoning and site plan control with a single, town-wide framework. Both municipalities establish distinct

employment precincts with clear, criteria-based standards for uses, site design, landscaping, parking, and buffering. By consolidating multiple approval processes into one By-law, both municipalities reduce administrative burden and over-processing, while maintaining strong development and design control. The result is faster, more conventional development in an Employment Area without compromising regulatory standards or community objectives.

A study of the City of Guelph's recently approved Stone Road/Edinburgh Road Area CPP By-law, although focused on mixed-use residential development, offers practical lessons related to drafting clear regulations, balancing flexibility with predictability, and ensuring effective implementation.

Further, City of Ottawa's pilot CPPS for the Kanata North Economic District provides a distinctive employment-focused example within a specialized economic hub. By leveraging a CPPS to transform an aging business park into a modern innovation district targeting 10,000 new jobs, Ottawa demonstrates how this tool can strategically advance employment planning objectives. Their approach illustrates the potential of a CPPS to achieve transformational change, excellence in urban design, and economic growth within a separate, cohesive governing framework that supports both development certainty and job creation.

The jurisdictional review provides key guidance for staff when exploring development of a CPP By-law for the Employment Area that may:

- Establish precinct-based structures that clearly define permitted uses, employment functions, and design standards aligned with Official Plan objectives;
- Allow some flexibility in land use and development standards to enable businesses to accommodate evolving economic conditions, emerging industries, new technologies, and modern operational needs; and,
- Streamline development approvals to deliver faster responses to business proposals and support employment growth targets, while maintaining high-quality design and environmental performance.

Key Directions for the Employment Area CPP By-law Scope and Structure

The following key directions are preliminary and will be explored and refined through further analysis and consultation with technical teams, businesses, landowners, and the public.

Element	Recommended Key Direction
Structure and Scope of the Bylaw	<ul style="list-style-type: none"> - Prepare the Burlington Employment Area CPPS in a manner that is user-friendly and provides flexibility to be responsive to market conditions and supports businesses. - Simplify and streamline land use regulations for the City's Employment Area.
Guiding Principles and Vision	<ul style="list-style-type: none"> - Create a regulatory framework that achieves the goals and objectives set out in proposed Official Plan Amendment 7, for the Employment Area, such as: <ul style="list-style-type: none"> o To maintain a sufficient supply of land within the Urban Area for employment in order to achieve the City's employment forecasts; o To provide appropriate locations for employment uses that have features that are not compatible with other land uses; o To maintain the primary function and long-term viability of lands designated for employment uses; o To develop existing lands designated for employment uses in a manner that efficiently uses existing infrastructure and land, and supports intensification; o To enhance employee access to amenities that supports the broader function of the Employment Area; o To support the development of new connections to cross key, major barriers, as identified in the City's Integrated Mobility Plan; and, o To establish a tertiary planning framework that recognizes areas within the Employment Area and provide direction on street network, active transportation, and servicing infrastructure consistent with the City's Integrated Mobility Plan.

Exemptions	<ul style="list-style-type: none"> - Establish appropriate exemptions for which a CPP development application would not be required. This may include matters such as: <ul style="list-style-type: none"> o An activity involving only site alteration subject to the City's Site Alteration By-law, as amended, or only tree removal subject to the City's Private Tree Protection By-law, as amended; o Infrastructure projects initiated by a public authority; o Repairing or rebuilding a legal non-conforming building, subject to criteria; and, o Managing lawfully established uses.
Transitional Provisions	<ul style="list-style-type: none"> - Establish transitional provisions which will provide guidance on how to deal with any existing site-specific applications already made under the <i>Planning Act</i> to outline clear direction to ensure the continued processing of the application without delay. - Establish provisions to transition existing site plan agreements and will consider the approach for lawfully established uses.
Development of Precincts	<ul style="list-style-type: none"> - In collaboration with Burlington Economic Development, explore the use of employment precincts to identify market and development opportunities and challenges in employment areas. This could include special areas such as Uptown, Tremaine-Dundas, and any other precinct drivers that may be needed as a result of OPA 7.
Pre-Consultation Process	<ul style="list-style-type: none"> - Establish a process through which an applicant is required to meet with City staff through a formal pre-consultation process to obtain the requirements for a complete CPP development application. - Given the 45-day timeframe in which staff have to make a decision on a complete application, the pre-consultation stage is key to ensure a smooth and customer-focused application process that can identify any potential challenges upfront.

Classes of Development and Delegated Approver	<ul style="list-style-type: none"> - Establish a framework for delegation of approvals based on classes, such as: Class 1: Standard – staff approval, Class 2: Variation – staff approval, Class 3: Variation requiring Committee or Council approval, to reduce staff effort for council reporting for applications that meet the requirements of the By-law or are within the identified staff variation.
Notice of Application and Decision	<ul style="list-style-type: none"> - Develop notice requirements and procedures for applications and decisions of the various classes of development including Class 1, 2 and 3 applications and decisions. Staff will assess existing methods of notice delivery available including mailings, the City's Public Notice webpage and development applications webpage. - The <i>Planning Act</i> and O.Reg. 173/16 requires notice of complete applications and notice of decision to only an applicant.
Tertiary Planning	<ul style="list-style-type: none"> - Establish provisions to require that development located within a Tertiary Planning Area, as identified through OPA 7, shall demonstrate how findings of a tertiary planning process, such as the shared responsibility for infrastructure, have been considered in and incorporated into a CPP Application.

Key Directions for Provisions of Community Planning Permit Elements

The key directions for the provisions to be included in the By-law are summarized in the table below. These represent the next steps staff will consider in developing a CPP regulation framework for the Employment Area.

Element	Recommended Key Directions
Decision-Making Criteria	<ul style="list-style-type: none"> - Include detailed provisions that provide clear guidance for evaluating a Community Planning Permit development in the Employment Area, including decision-making criterion that aligns with and implements the vision, guiding principles, goals, and objectives of the Official Plan.
Schedules/Maps	<ul style="list-style-type: none"> - Develop mapping to clearly define the boundaries of the Community Planning Permit Area and any required

	precincts to guide land use and development, ensuring sensitivity to the surrounding context.
Permitted/Prohibited Uses	<ul style="list-style-type: none"> - Prepare a list of Permitted and Prohibited land uses in accordance with the Provincial Planning Statement, 2024, the policies of OPA 7, with recognition of the existing provisions of the City's Zoning By-law and consider the approach for lawfully established uses. - Identify potential Class 2 Permitted Uses, where specific uses may be conditionally permitted subject to defined criteria and/or regulations. - Incorporate flexibility within the definitions of permitted and prohibited uses to reduce the need for frequent By-law amendments. Broaden permitted use definitions to include complementary or functionally similar uses that are consistent with the intent and purpose of the permitted uses listed in the By-law.
Existing Uses	<ul style="list-style-type: none"> - Confirm the legal status of existing uses through a comprehensive review of current conditions and site-specific zoning provisions. Where appropriate, introduce site-specific provisions; otherwise apply general provisions.
Variances from Standards	<ul style="list-style-type: none"> - Establishing minimum or maximum thresholds for a development standard, while incorporating flexibility to allow deviations through a Class 2 Permit. This may involve specifying a numerical value or percentage range within which a proponent may request an increase or decrease to a prescribed standard under the By-law. - In determining development standards, staff will review existing Zoning By-law Amendments and Minor Variance decisions to identify common challenges when planning employment-based uses.
Conditions	<ul style="list-style-type: none"> - In accordance with O. Reg. 173/16, prepare a comprehensive list of potential conditions that may be applied to a Community Planning Permit. For each condition, the list should include the following: <ul style="list-style-type: none"> o Type of Condition: Identify the category of the condition (agency approval, transportation, infrastructure, environmental protection, etc.) o Description: Provide a clear explanation of the specific requirements. Ensure that the description is precise and quantifiable. o Condition Timing of Fulfillment: Specify when the condition must be fulfilled: <ul style="list-style-type: none"> ▪ Prior to the issuance of the Community Planning Permit; or following the issuance of a Community Planning Permit.

	<ul style="list-style-type: none"> ○ Legal Mechanisms: Indicate whether the condition must be secured through an agreement and specify whether such agreement must be registered on title. ○ Exemptions: Identify any circumstances or types of development that may be exempt from a condition type. ○ Extension Request Criteria: Outline the criteria and process for considering extension requests related to the fulfillment of a condition.
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Implementation

To support the development of a CPPS for the City's Employment Area, implementation tools and process will be developed, including but not limited to:

- Internal processes, supporting technology and documents that will be used during the review of CPP development applications;
- Completion of a development application process map, including pre-consultation;
- An implementation guide to support residents, businesses, landowners and applicants as they navigate a CPP By-law and application process; and,
- Comprehensive monitoring framework to track the progress of the goals and objectives of the Official Plan and CPP By-law.

Next Steps

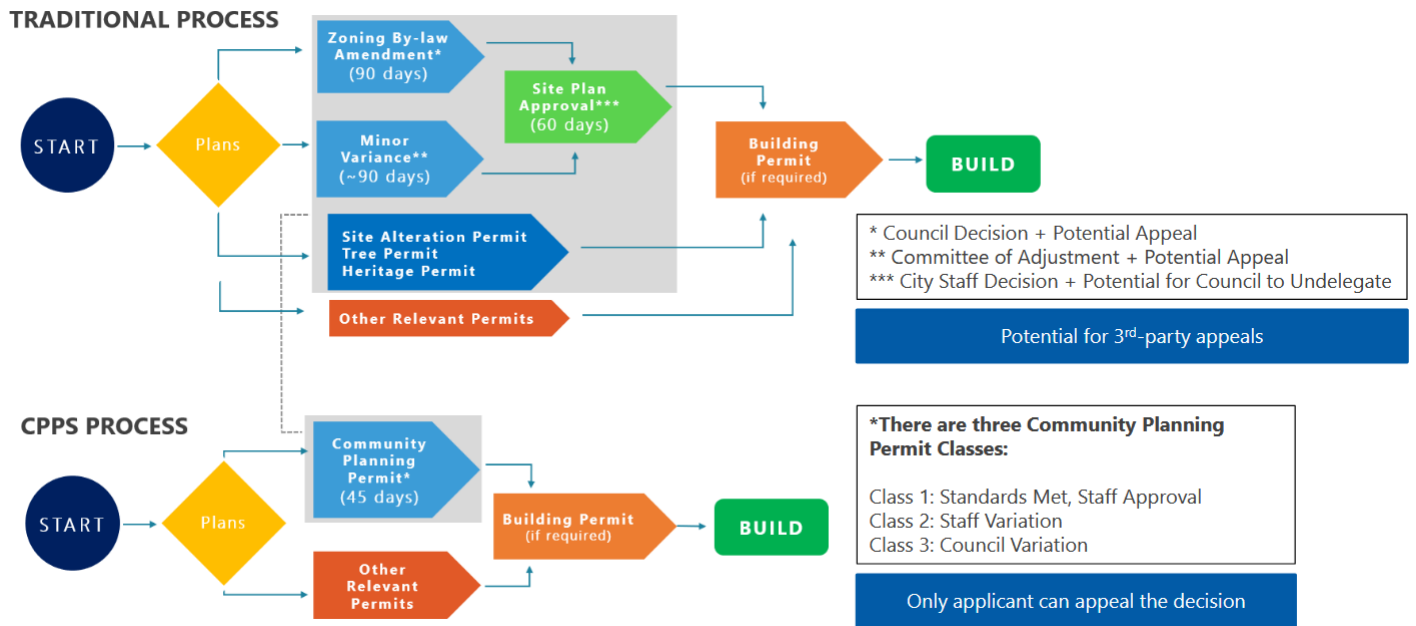
The CPPS tool presents the opportunity to streamline development applications in the Employment Area and greater flexibility in the application of development regulations, while delivering timely, high-quality development aligned with the City's long-term planning vision for economic growth. As discussed in this memo, other municipalities are exploring and developing the tool for the employment area to encourage investment, job growth, and economic competitiveness as well as enhance planning approval certainty. Exploration of the tool for the City's Employment Area demonstrates the City's commitment to both process improvements and improving customer experience.

For several years, the City has been exploring the CPPS tool for select areas, including the development of a CPP By-law for the Major Transit Station Areas. Leveraging the significant work already completed for the MTSAs, the City now has an opportunity to expand this approach to other areas that would benefit from similar process improvements, such as the Employment Area. Through the City's draft QEW Prosperity Corridor planning work, a draft recommendation also suggested that the City consider the application of a CPPS for the City's Prosperity Corridor. Building on this work, City

staff will continue to explore the opportunity to establish a CPPS for the City's Employment Area, including:

- Preparation of CPPS enabling policies through a future amendment in accordance with the *Planning Act*, as directed through OPA 7;
- Collaboration with internal departments and external agencies to identify and mitigate any potential risks;
- Prepare a draft CPP By-law; and,
- Development of a public engagement approach to gather feedback on an Official Plan Amendment and draft CPP By-law, which would both be brought forward by staff concurrently for engagement and consideration.

Appendix A: Community Planning Permit vs Traditional Process



Appendix B: Jurisdictional Review of Best Practice – Community Planning Permit System

Based on a jurisdictional review of municipalities who either implemented a CPP By-law or are in the process of developing a CPP By-law, this section of the memo provides an overview of their approaches to identify best practices and key takeaways. The intent of this review is to help inform the development of a tailored CPP framework for the City of Burlington's Employment Area, with the goal of introducing flexibility and supporting more streamlined development approvals for employment uses.

The CPPS framework of the following municipalities were selected for evaluation due to their relevance and potential suitability to the City of Burlington's context:

- Town of Gananoque
- City of Guelph
- City of Ottawa
- Town of Huntsville

The Town of Gananoque

(Note: The Town of Gananoque uses the term Development Permit System (DPS) which is functionally equivalent to a Community Planning Permit System (CPPS). The term DPS is used in this memo for accuracy.)

CPP By-law Overview and Approach

The Town of Gananoque adopted an Official Plan Amendment (OPA) in 2009 to enable a Development Permit System (DPS), with the corresponding By-law coming into effect in 2011. The primary objective of the Town's DPS By-law is to preserve and enhance cultural heritage, protect the community's environmental character, and promote a high quality of life through sustainable development.

Discussion and Key Takeaways

The Town of Gananoque's wide DPS By-law serves as an innovative example of how a CPPS can successfully replace a traditional zoning framework. By implementing a flexible, criteria-based development permit system across the entire municipality, Gananoque demonstrates how a CPPS can operate as an effective and adaptable land use planning tool.

The DPS By-law identifies twelve land use precincts, including a distinct Employment Designation. This designation includes detailed policies on permitted and discretionary uses, special exceptions, and design criteria. Distinctly, the employment design criteria

includes clear site planning provisions related to walkways, landscaping, and parking, ensuring development is functional and context sensitive. Gananoque's approach illustrates how flexibility and structure can coexist within a single regulatory framework and provides insights on how to write a By-law with clear, efficient, and design-focused development standards.

City of Guelph

CPP By-law Overview and Approach

The City of Guelph has adopted an OPA to enable a CPPS. The CPP By-law for the Stone Road/Edinburgh Road Area has been in effect since March 2025, while a separate CPP By-law is currently being developed for the Downtown. The City of Guelph's CPPS is a key initiative under their Housing Accelerator Fund Action Plan, aimed at facilitating the creation of affordable housing and increasing predictability and efficiency in the planning approvals process. (Source: [April 2025 Staff Report](#)).

Discussion and Key Takeaways

Acknowledging that Guelph's CPP By-law is primarily concerned with housing, it is still a valuable case study for understanding how employment uses can be integrated into a CPP By-law. The Stone Road/Edinburgh Road Area CPP By-law establishes seven land use precincts, including the Mixed-use Corridor and Neighbourhood Commercial Center, both of which permit a range of employment uses. The By-law includes detailed provisions addressing employment related functions, such as outdoor storage, parking, loading, enclosed operations, shipping containers, and fencing. These regulations illustrate how operational business needs can be managed within flexible regulatory system. While Guelph's approach is situated in a mixed-use context, its treatment of use permissions, development standards, and parking regulations offer insights for staff as they develop a CPP By-law tailored to Burlington's employment context.

City of Ottawa

CPP By-law Overview and Approach

The City of Ottawa adopted an OPA to enable the use of a CPPS in 2024. A CPP By-law is currently under development for the Kanata North Economic District which has been identified as a pilot area for the implementation of a CPPS. The By-law is set to be released sometime in 2025. The purpose of CPP By-law is to guide the transformation of a former business park into a mixed-use innovation district structured around two Bus Rapid Transit Stations. (Source: [September 2024 Staff Report](#))

Discussion and Key Takeaways

The City of Ottawa's methodology to implement a CPPS serves as a valuable case study, driven by its ambitious vision of creating a globally recognized mixed-use

innovation district anchored by a major research and technology park. With a strong employment focus and in light of the revised definition of Employment Area in the updated Provincial Planning Statement, 2024, Ottawa's approach will be informative in understanding how municipalities can align new land use planning tools with evolving provincial policy directions.

The area-specific CPPS builds upon extensive visioning and master planning work, providing a solid foundation for the draft By-law currently in development. A key objective of the forthcoming By-law is to provide greater certainty for targeted employment uses, specifically within the knowledge-based sector, by establishing development standards that offer built-in flexibility to respond to site-specific conditions. Ottawa's approach focuses on supporting job creation through business expansion and the attraction of high-value employers, while integrating residential uses with a full range of amenities to meet the daily and weekly needs of both workers and residents.

Town of Huntsville

CPP By-law Overview and Approach

The Town of Huntsville adopted an OPA in 2022 to enable the implementation of a CPPS, with the CPP By-law coming into effect in 2023. The Town of Huntsville's objective in adopting the CPPS was to manage development in a more streamlined and flexible manner, while ensuring the protection of natural heritage and natural resources. (Source: [March 2020 Staff Report](#)).

Discussion and Key Takeaways

The Town of Huntsville's CPPS offers a unique and instructive example, as it applies Town-wide, and fully replaces both the Zoning By-law and Site Plan Control By-law. This comprehensive approach means that all development within the municipality is reviewed against the CPP By-law framework.

Notably, the Town of Huntsville includes dedicated Employment Precincts within its CPP By-law including Urban Business Employment, Community and Rural Business Employment, and Heavy Employment. Each employment precinct is supported by detailed development provisions, such as permitted uses, lot requirements, landscaping and buffer regulations, outdoor storage standards, trailer and boat storage regulations, and parking and loading requirements. Huntsville's approach demonstrates how employment areas can be effectively integrated into a CPPS, balancing regulatory clarity with built-in flexibility. This model is a useful precedent for staff, highlighting how tailored provisions can meet the specific needs of employment uses while supporting a streamlined, one-stop shop approach to development approvals.

Lessons Learned

A review of the municipalities that have implemented or are developing a CPP By-law provides beneficial insights to guide the creation of a tailored CPP By-law for the City of Burlington's Employment Area. While the specific planning rationales for implementing a CPPS vary across jurisdictions, the underlying function remains consistent, which is to support greater flexibility, predictability, and efficiency in the development approvals process.

The municipalities examined demonstrate the versatility of the CPPS as a land use planning tool capable of streamlining approvals while advancing local planning visions, goals, and objectives. Each case exemplifies a distinct approach. For example, as an early adopter, the Town of Gananoque's implemented a comprehensive DPS that replaced traditional zoning across the municipality, defining detailed precinct structures that balance flexibility with clear, criteria-based standards to guide design and site planning. In contrast, the City of Ottawa is developing a CPP By-law for the Kanata North Economic District to strategically advance employment growth, attract knowledge-based industries, and integrate contemporary planning principles like transit-oriented-development.

This jurisdictional review demonstrates how municipalities are leveraging the CPPS to modernize land use regulation and advance employment objectives through a streamlined development process. The comparative case study analysis highlights three key insights, including:

- The value of Precinct-based structures that clearly define permitted uses, employment functions, and design standards aligned with Official Plan objectives, providing clarity, consistency, and flexibility within defined parameters to achieve desired land use and built form outcomes.
- Balancing predictability and flexibility within development standards is critical to accommodate evolving business models, technologies, and market conditions. This coordination provides clear rules that build investor confidence while allowing the adaptability needed to respond to change.
- Refining implementation details within the CPP By-law, including application requirements, review procedures, and delegated approval authority creates an opportunity to improve efficiencies, streamline approvals, and attain employment growth targets while maintaining high standards in urban design and environmental performance.

These insights will inform the development of a tailored CPP By-law for Burlington's Employment Area, designed to attract investment, reduce administrative burden, and advance the City's long-term vision for sustainable and innovative economic growth.

Statutory Public Meeting

City Initiated Official Plan Amendment No. 7 and ROPA No.1: Employment Area

Staff Presentation | DGM-01-26

January 13, 2026



Introduction: Project Timeline



Two Public Open houses



Five Meet with a Planner meetings



One written submission

What we've heard so far ...



Impacts of Change



Land Use, Infrastructure, and Review Process



Implementation and Transition



5,000

active business operating City wide

40%

of all businesses are located in the Employment Area

45%

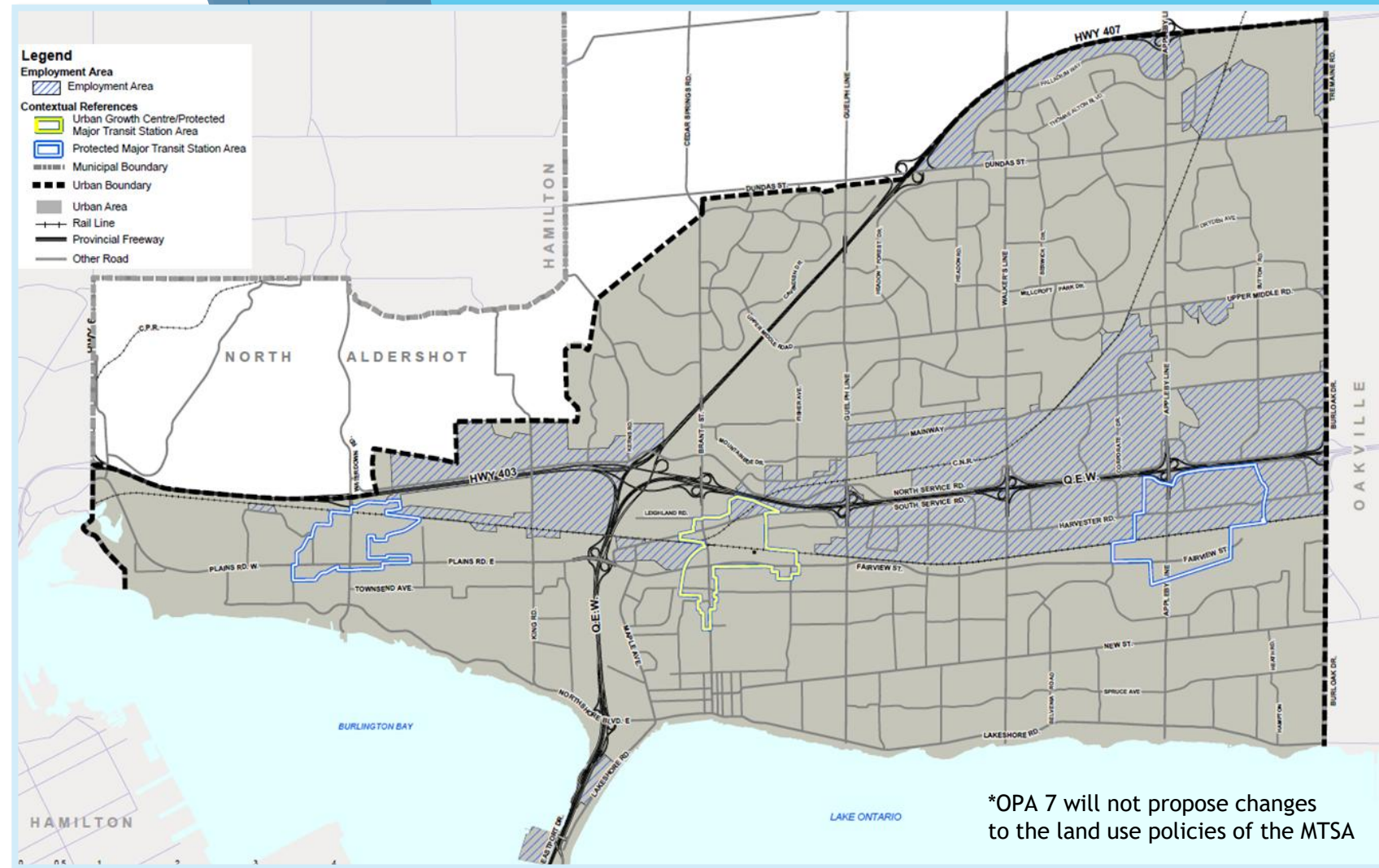
of total employment in Burlington is within the Employment Area

22,000

Forecasted job growth between 2024 & 2051 across the City

*Population and Employment Growth Analysis Study, 2025

Snapshot of Burlington's Employment Area



*OPA 7 will not propose changes to the land use policies of the MTSA

Planning Framework Summary

Provincial Changes

Bill 185

Cutting Red Tape to Build More Homes Act, 2024



- **Halton Region** as an upper-tier municipality **without planning responsibilities**.

Bill 97

Helping Homebuyers, Protecting Tenants Act, 2023



- **New “area of employment”** definition
- **Transition policy** – Lawfully established uses before October 20, 2024

Repeal of Growth Plan, 2019 and replaced by New PPS 2024





















Removal criteria:


- **Sufficient** employment lands
- Identified **need for the removal**;
- Avoid, minimize and mitigate **negative impact**;
- Availability of **infrastructure and public service** facilities.

Burlington's response to Provincial Changes

- ▶ Population and Employment Growth Analysis Study
- ▶ Burlington Official Plan 2020, Targeted Realignment Exercise

Changes to: Employment Area Definition

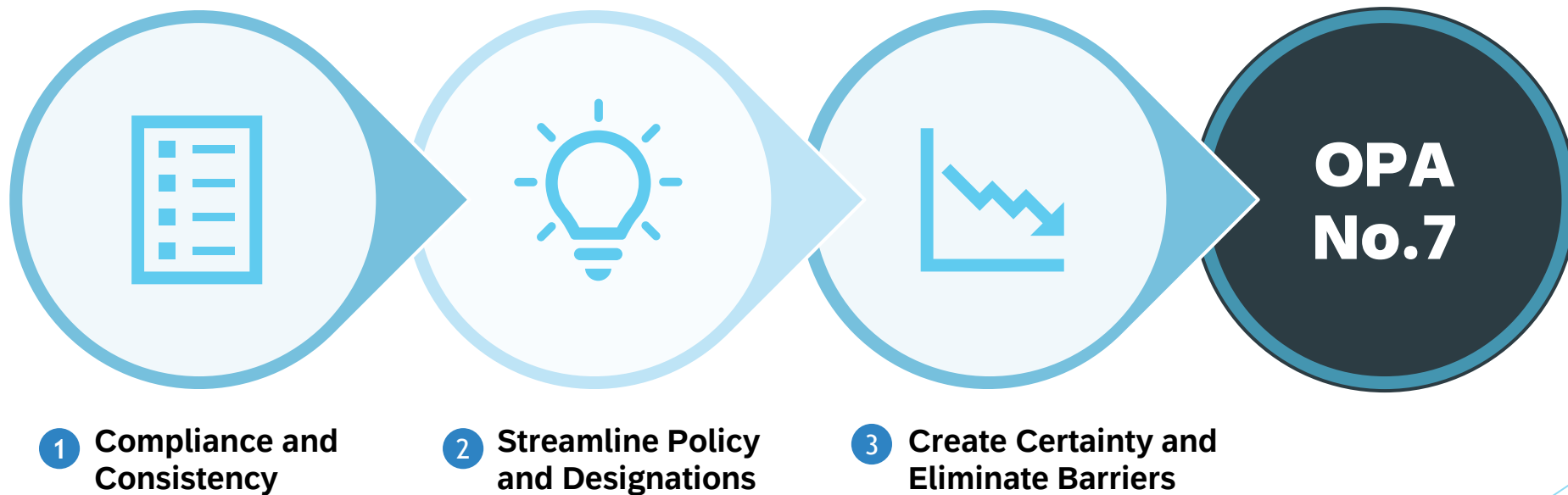
	Old	New
 Manufacturing		
 Warehousing		
 Office		
 Retail/Commercial		
 Institutional		
 Public Service		

 Permitted as a use associated with warehousing or manufacturing

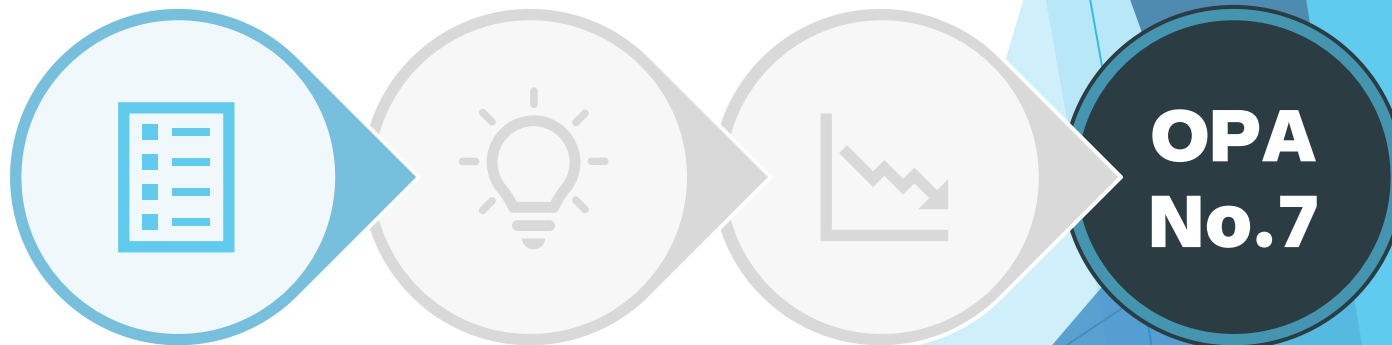
Proposed Approach to address Changes

- ▶ The City of Burlington is proposing an Official Plan Amendment (OPA) No. 7 to the Burlington Official Plan, 2020 and an Amendment to the Regional Official Plan, 1995 (ROPA).

OBJECTIVES of the proposed OPA:

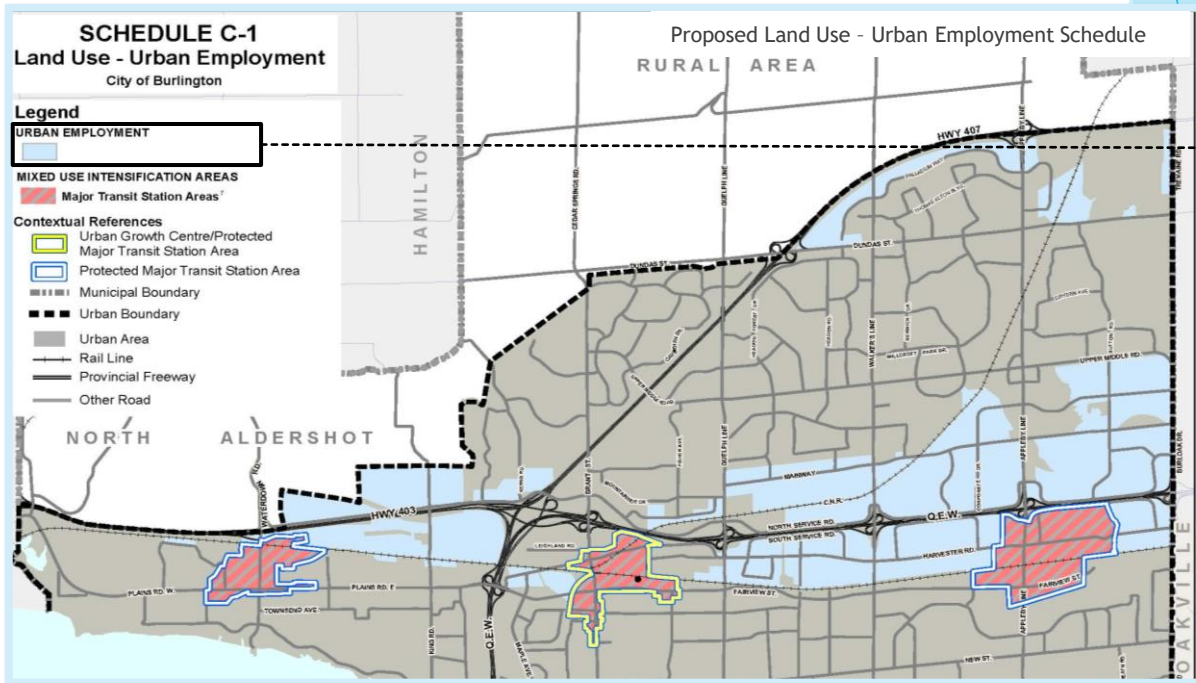
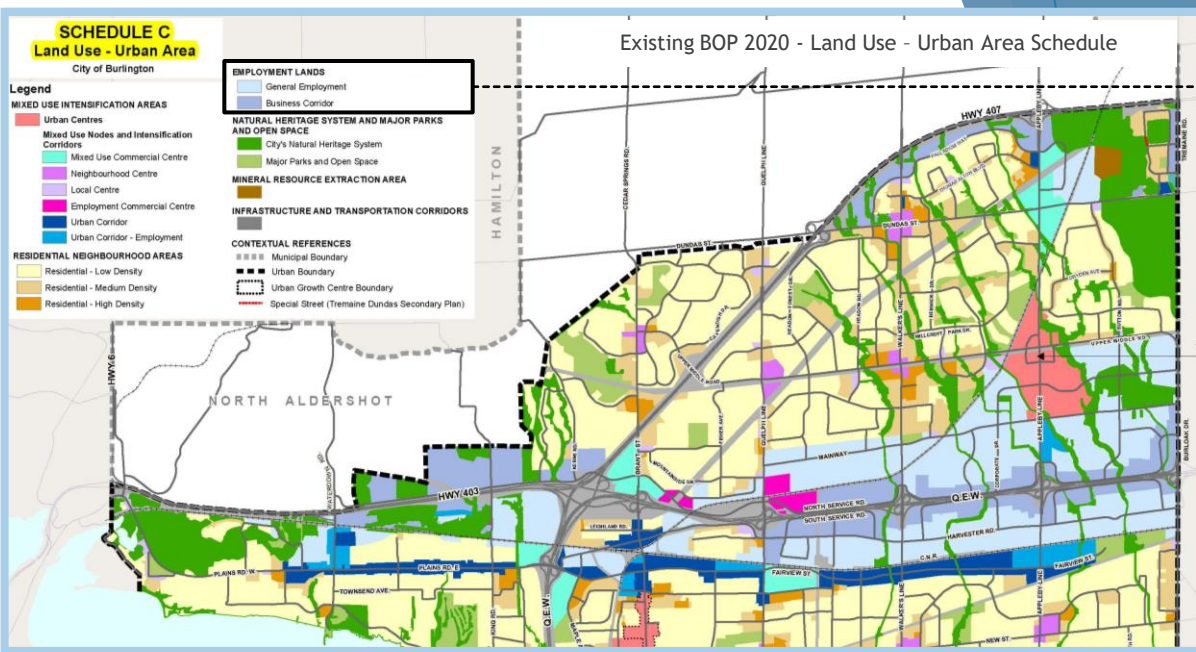


Proposed OPA Objectives



1 Compliance and Consistency

- City's Employment Area definition = “**area of employment**” Planning Act.
- **Land use permissions** to align with new definition
- Non-Employment Area uses are **permitted to continue only if the use was lawfully established on the parcel of land prior to October 20, 2024.**
- Policy protecting the Employment Area remains. **New approach to remove land from the Employment Area to align with PPS.**
- **No employment land removals** are proposed as part of this amendment.

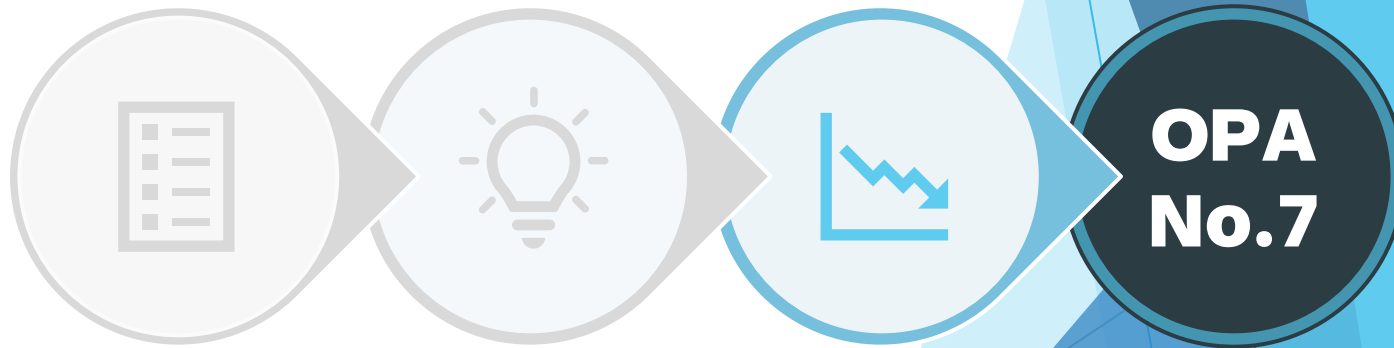


2 Streamline Policy and Designations

- Propose to **Remove Policies**:
 - No longer relevant/not aligned with the new definition/policy.
 - Addressed through recent **policy initiatives**.
 - Use the **appropriate tools** to identify strategic directions for future work/studies
- Address design with general **urban design policies and site plan control**, and setbacks/separation through zoning regulations
- Consolidate to **one land use** designation – **Urban Employment**, with the exception of areas within the MTSAs.

General Employment designation
+
Business Corridor designation
= Urban Employment

Proposed OPA Objectives



3 Create Certainty and Eliminate Barriers

- Staff are **exploring a Community Planning Permit System** for Burlington's Employment Area.
- **Builds on** extensive work already completed for the Major Transit Station Areas (MTSAs).
- Opportunity to **apply a streamlined approach** to another key area of the City.

What is a Community Planning Permit System?

- Combines multiple approvals into **one streamlined process**, including:

Zoning By-law
Amendment

Site Plan
Control

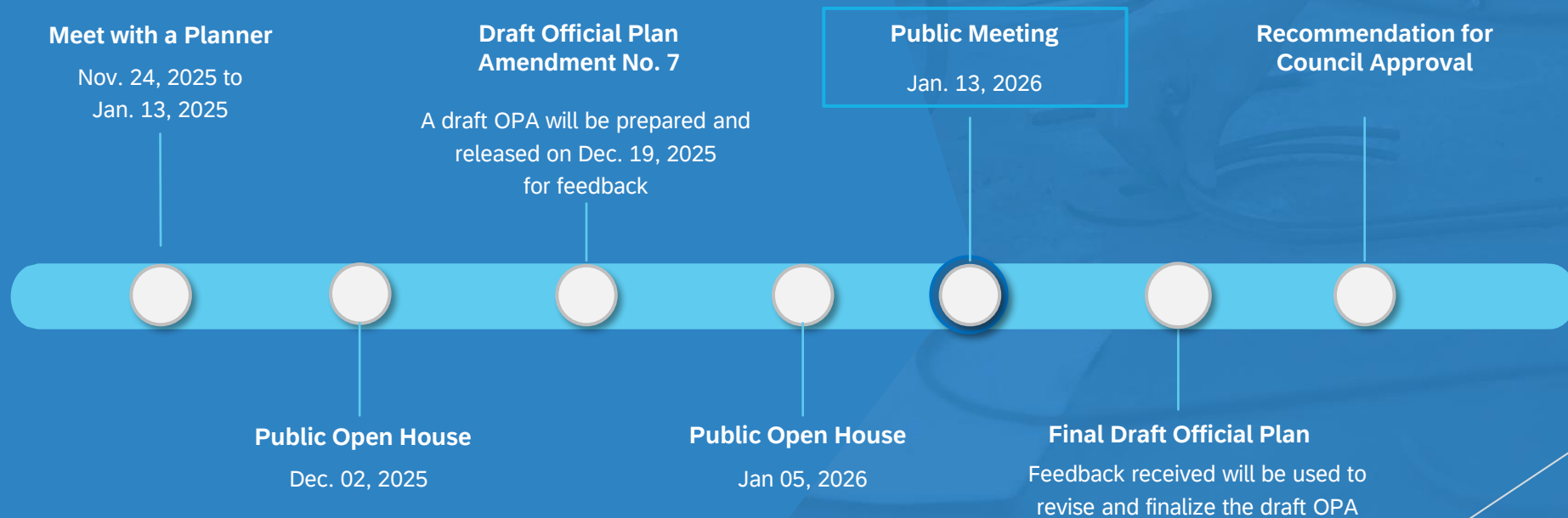
Minor
Variance

Community Planning Permit System

- Does not replace land division approvals or building permits.

Next Steps ...

Staff will consider all feedback received and will bring forward to Council a recommendation for approval of the proposed OPA and ROPA.



January 13th 2026 Public Meeting

Official Plan Amendment to Employment Area

Presenter: Mark Corker

Background - Mark Corker

- Lived in Burlington since 1981
- Tech Entrepreneur – Seradex ERP software is sold globally
- Real Estate Owner in Employment Lands Area
- President of Halton Condo Corp 86 (Walkers Line & Mainway)
- Founder and Executive Director of MTechHub
 - A Cluster for 400 Canadian Manufacturers Adopting Technology
- Board Member of Wood Manufacturing Cluster of Ontario
- Active in the EU Cluster Ecosystem

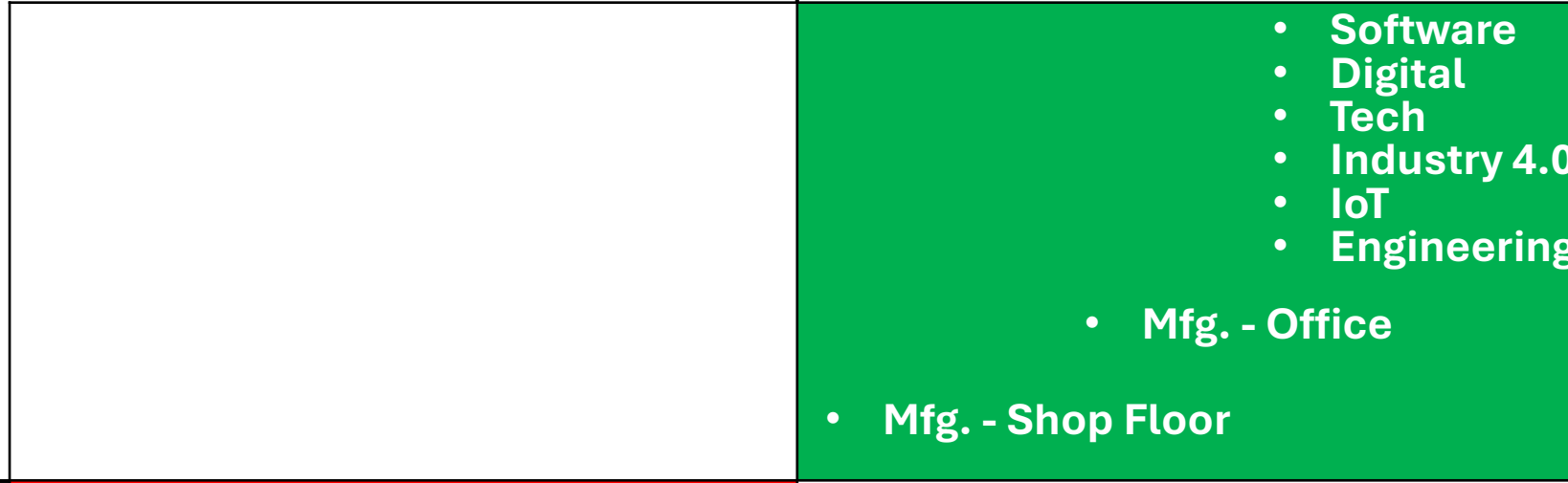
Core Objectives for PPS

- ✓ **Support an "Investment-Ready" Economy:** Ensuring a supply of land for manufacturing and logistics to keep Ontario competitive.
- ✓ **Ensuring Long-Term Economic Viability:** Prevent industrial operations from being "pushed out" by housing that might complain about noise, odors, or traffic.
- ✓ **Optimization of Infrastructure:** Align employment growth with transit and existing sewage/water capacity for more compact development.

Property Uses under PPS

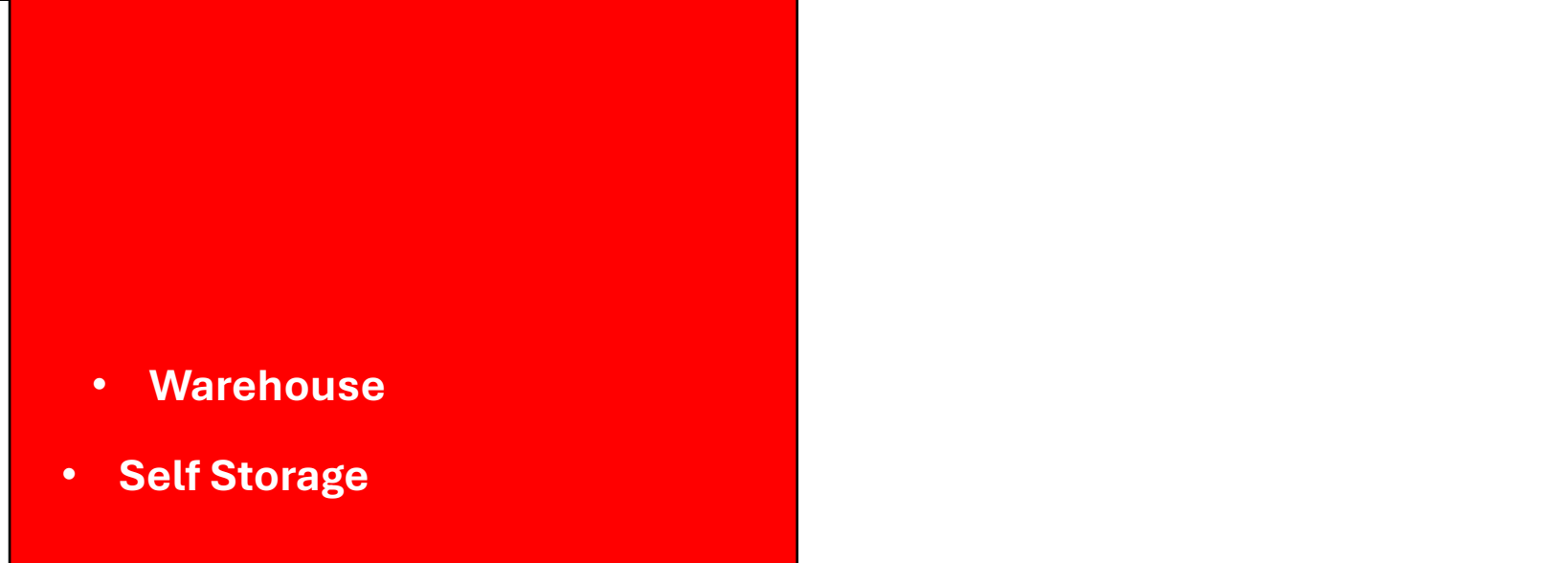
Protected		Exclude
Manufacturing		Standalone retail (malls, plazas)
Warehousing		Standalone office buildings
R&D related to manufacturing		Institutional uses (schools, hospitals)
Ancillary offices serving the site		Commercial recreation

High Employment Density



High Wages

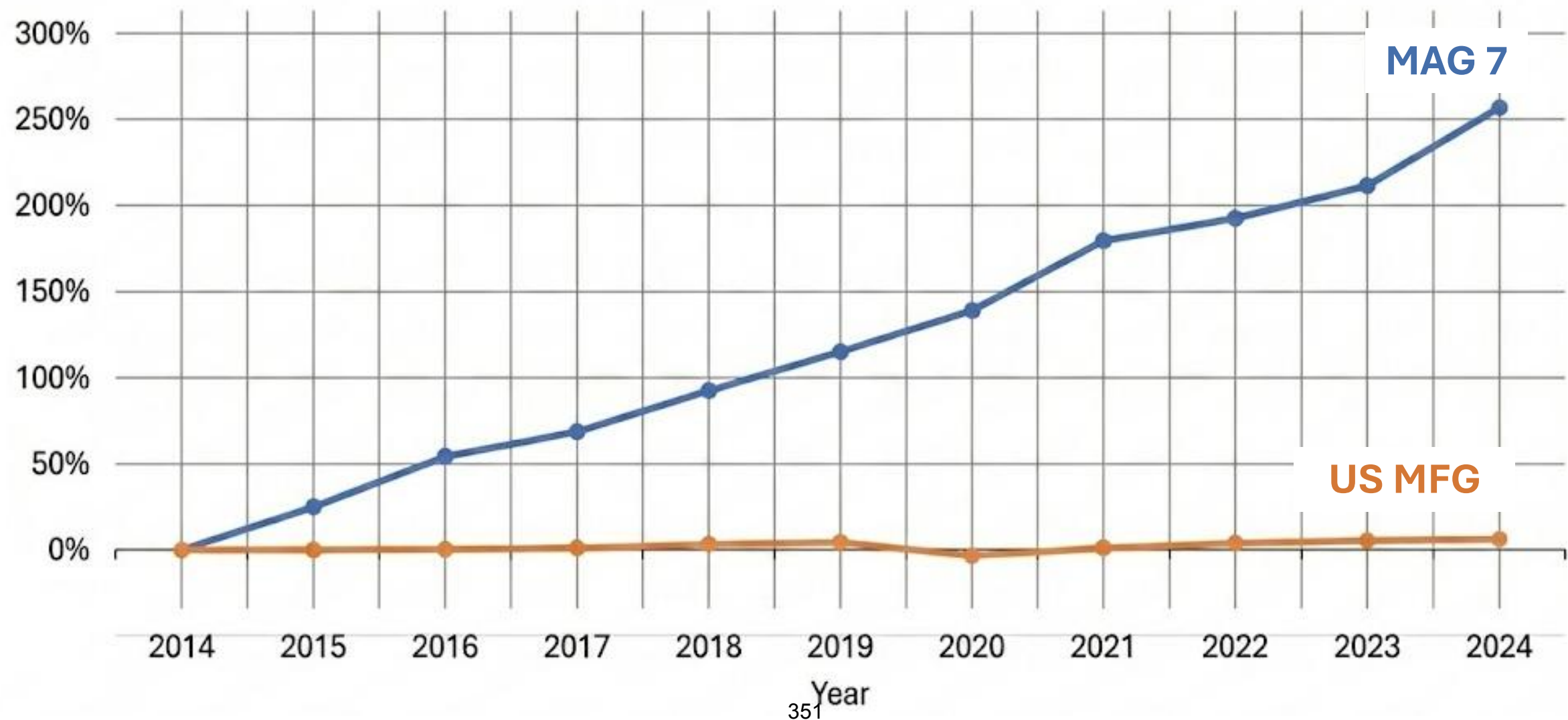
Low Wages



Low Employment Density

250

Employment Growth – Last Decade





Hamilton Fulfillment Centre

- 5000 Robots
- Miles on conveyors
- Access to Airport and Highways
- 250 Tractor Trailers per day



	Amazon Hamilton	Industry Average
New Build Cap Ex	\$340 / sq ft	\$80
Footprint	800K Sq Ft	300K
Storage	4.0M – 5 levels	300K 1 level
Picks per hour per worker	400	60

DEATH OF THE WAREHOUSE



Warehouse 3100 Mainway



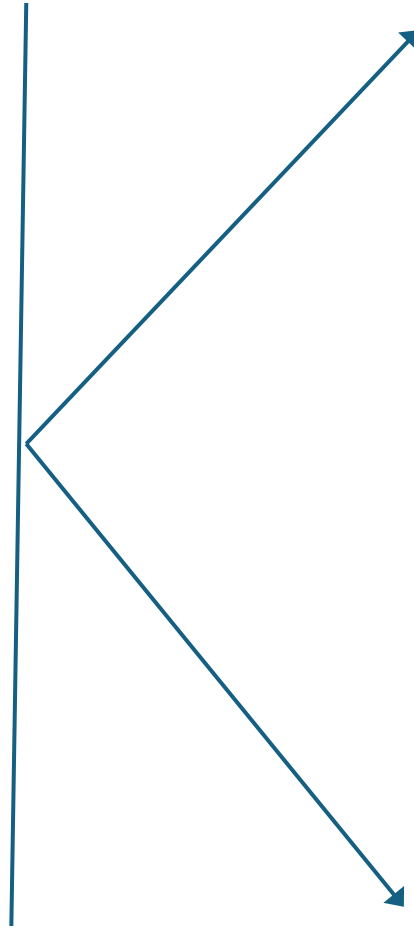
Listed for 550 Days

Warehousing

- Short term leases
- Low switching cost = tenant moves out
- Low pay unskilled shift work jobs
- Low job density per 1000 sq ft / low demand for public transit
- Low land-value as prospects are not economically viable
- Efficiency needs tall clear heights, huge footprints, and advanced infrastructure—none of which fit small-warehouse zoning.
- Logistics is consolidating into fewer, larger, more automated hubs, small warehouses may become niche or underutilized.
- Limited truck staging and yard space: Advanced operators need dozens of docks, trailer parking, and queueing lanes.

K Shaped Economy

Golden Horseshoe Growth: Digital, Tech, Mfg, AI, Green
What's booming – data centers, AI, Digital
Good Wages



This zoning proposal
drives building use from
Top Prong to Bottom Prong

Manual labor and low skill white collar
Reduced or Eliminated by Digital & AI
Negative Growth
Low Wages

Why is zoning protecting these jobs?


Nights Warehouse Lead Hand

Gordon Food Service  · 3.5 ★

Milton, ON

\$22 an hour - Full-time

Warehouse Team Member (Weekend Shift)

Princess Auto  · 3.2 ★

Milton, ON

Warehouse Operations Team Lead (Mandarin speaker)

CTS Global Logistics (Canada) Inc 

2995 Peddie Road, Milton, ON

\$19-\$25 an hour - Full-time

Pull-away/Pallet Runner

CPU US  · 2.8 ★

Milton, ON

\$20 an hour

Industrial Policy – EU Research

Zoning Doesn't Work

- Top Down Zoning: lead to inefficient land use and wasted resources. They fail to account for the organic, complex factors (networks, knowledge spillovers) that create successful clusters
- Fumbles Transitions: Creates "left behind" regions with no support for new growth sectors
- Policy Limitations: Broad public policies have limited impact on industrial growth;
- Clusters need specific interventions to target growth bottlenecks

What Does Work

- Fostering Networks to share Challenges
- Infrastructure & Logistics Support
- Training Support
- Supply Chain Improvements

BEDC Website

OUR KEY INDUSTRIES

- ✓ Advanced Manufacturing
- ✓ Food & Beverage
- ✗ Biomedical & Life Sciences
- ✗ Clean Technologies
- ✗ Information & Communication Technology
- ✗ Professional & Technical Services



Can't locate 4 of 6 key industries in "Employment Lands"

Industrial Policy Focus Points

Genesis of Cluster Formation



Executive MBA in Digital Transformation

Over 14 months, we will provide you with the tools, resources, and knowledge to develop as a leader who will contribute to and grow the evolving digital economy. Course material is delivered online and is structured around four in-person residencies throughout the program, taking place at the Ron Joyce Centre campus in Burlington, Ontario, with one travel residency.



Fiber & 5G to the Factory


- AI, Industry 4.0, IoT, Logistics, Ecommerce – all depend on high-bandwidth fiber, redundant networks, 5G and Fiber infrastructure

Fiber & 5G to the Factory

- Burlington is bottom 10% in connectivity
- No 5G
- No Fiber
- 1980's Infrastructure
- Transform to a Digital Leader



Property Uses to Maximize Employment Lands

Protected		Exclude
Manufacturing		Standalone retail
Standalone office for Technology Providers		Warehousing
R&D related to manufacturing		Institutional uses (schools)
Ancillary offices serving the site		Commercial recreation

Chair and Members of the Committee of the Whole
City of Burlington
426 Brant Street
Burlington, ON
L7R 3Z6



Friday, January 9, 2026

**RE: STATUTORY PUBLIC MEETING – OPA 7 AND ROPA 1 INPUT
4279 PALLADIUM WAY**

We are writing on behalf of our client, Kindera Living, the owners of the lands municipally known as 4279 Palladium Way (the Subject Property). We have reviewed the materials released pertaining to the City-initiated Official Plan Amendment No. 7 (OPA 7) and Regional Official Plan Amendment No. 1 (ROPA 1), including the associated Appendices and background studies.

We are submitting this letter to provide input for the Committee’s consideration regarding the proposed policy framework. While we recognize the necessity of updating the City’s Official Plan to conform to the new definition of ‘Area of Employment’ introduced by Bill 91 and the Provincial Planning Statement 2024 (PPS), the proposed implementation creates a policy gap for non-industrial employment uses (specifically office, commercial, and institutional uses) that are vital to Burlington’s economic future.

We respectfully submit the following technical comments and a proposed solution for the Committee’s consideration.

Subject Property Context

The Subject Property and the surrounding Palladium Way corridor are characterized by a prevalence of non-employment uses and proximity to sensitive land uses, rather than a cohesive industrial cluster. As illustrated in Attachment 1 (Existing Land Use Context), the lands along Palladium Way, between Walkers Line and Appleby Line, contain a diverse mix of uses including places of worship (e.g., New Apostolic Church, St. George's Anglican Church), existing long-term care facilities, self storage uses,

office uses, retirement residences, public park and commercial plazas.

Furthermore, the Subject Property is physically isolated from broader industrial clusters by major physical barriers, including the Highway 407 corridor to the north, Walkers Line to the west, Sheldon Creek to the east, and the established residential community immediately to the south. Additionally, due to the prevalence of sensitive land uses in the immediate vicinity (such as the residential neighbourhood directly south of Palladium Way and the various institutional uses along the corridor), heavy industrial uses (Class II or III facilities) would likely not be feasible to construct on the Subject Property due to provincial land use compatibility guidelines (D-Series guidelines) and required setbacks.

Status of Employment Area

Based on the context outlined above, the Subject Property does not form part of a "cluster of business and economic activities" as defined by the PPS 2024. Thus, the Subject Property is not an Area of Employment as per the Planning Act.

It is critical to note that the existing, in-force policy framework already recognizes this reality. Both the Region of Halton Official Plan and the Burlington Official Plan (1997) currently permit institutional uses on the Subject Property and the surrounding lands. Specifically, Policy 4.3(c) of the 1997 Official Plan permits institutional uses within all land use designations in the Urban Planning Area (with limited exceptions), and the Regional Plan permits these uses subject to specific criteria. This confirms that these lands have developed under a regime that permits and encourages diverse uses, rather than functioning as a strictly industrial employment area.

Therefore, by designating these lands as "Urban Employment" under the proposed OPA 7 framework, the City would be effectively limiting the permitted uses to warehousing, and research and development. Given the compatibility constraints and the existing mixed-use character of the area, this restriction would severely limit the usability of the land and could have the effect of limiting employment growth on a site that is well-serviced and strategically located.

Growth Analysis Review

The disconnect between the proposed designation and the on-the-ground reality is supported by the City's background study. The Growth Analysis Review prepared by Watson & Associates Economists Ltd., dated February 14, 2025, notes that a substantial portion of the City's employment base currently located in the proposed Employment Lands does not fall within the new Provincial Definition of an "Area of Employment."

Consequently, the proposed amendments will relegate a large percentage of active properties and jobs

to a “lawfully established” (legal non-conforming) status. While the transition policies proposed will protect these existing jobs, this may create uncertainty for businesses that are “employment” in nature (e.g., offices or institutional uses) but no longer meet the new definition.

Urban Employment Land Use Designation

The currently approved (though appealed) Burlington Official Plan 2020 included distinct designations (General Employment and Business Corridor) that accommodated a broader range of employment uses, including office and institutional functions. These designations recognized that “employment” is not solely heavy industry, nor are these uses necessarily appropriate for every parcel of land designated employment (such as the Subject Property).

By consolidating these designations into a single, more restrictive “Urban Employment” designation to align with the PPS 2024, OPA 7 removes the permissive policy basis for major sectors of employment growth. Specifically, it is unclear where new institutional (e.g., long-term care centres, trade schools) or major office developments are intended to locate outside of Major Transit Station Areas (MTSA).

While MTSAs are appropriate for high-density mixed use, they are not always suitable or sufficient for all forms of office or institutional development, particularly those requiring larger land parcels or specific campus-style configurations. The removal of these uses from permissions in employment lands leaves these uses without a designated “home” in the City’s land use structure.

Under the in-effect Burlington Official Plan 1997, Employment Lands are identified as the primary locations for both industrial and office activities. The proposed OPA 7 framework secures a place for industrial activities but explicitly displaces office and institutional activities without providing a clear alternative land use designation. As a result, a significant portion of Burlington's projected job growth will not be permitted on lands historically designated to accommodate it, without a specific designation to replace it.

Our Recommendation

We strongly recommend that the City modify OPA 7 to:

1. Remove the Subject Property and the Palladium Way corridor from the "Urban Employment" designation and the "Employment Area" boundary. As detailed above, these lands do not function as an Area of Employment under the PPS 2024 definition, and the introduction of heavy industrial uses is neither feasible nor compatible with the surrounding context.
2. Apply an additional land use designation (e.g. "Transitional Employment" or "Business Park") to these lands to accommodate the uses removed from the "Area of Employment" definition.

This approach is supported by the Growth Analysis Review commissioned by the City. In Appendix F

to the City's Staff report DGM-01-26, the authors recommend that the City:

"Consider developing a transitional land use designation adjacent to Employment Areas... The creation of a new employment land use designation for transitional lands adjacent to Employment Areas would provide greater opportunities to accommodate certain non-retail, non-industrial uses that would not be permitted under the new provincial Employment Area definition but that are also not typically accommodated in mixed-used commercial areas."

The report further lists potential uses for this designation, including places of worship, daycares, funeral homes, recreational facilities, and auto repair. These are uses that OPA 7 currently does not provide for, notwithstanding the transitional policies provided. Implementing this recommendation would ensure that a significant portion of Burlington's job growth has a dedicated place to grow.

Should you have any questions or concerns please do not hesitate to contact the undersigned.

Sincerely,

DESIGN PLAN SERVICES INC.

A handwritten signature in black ink, appearing to read 'T.J. Cieciura', written over a horizontal line.

T.J. Cieciura, MSc MCIP RPP
PRESIDENT

Encl.

TJC/amp

Legend

★ Subject Property (4279 Palladium Way)

--- Employment Area

Existing Use

Employment Area

Non-Employment - Institutional

Non-Employment - Other

Vacant Land

1:10,000





EMSHIH DEVELOPMENTS INC.

895 Brant Street, Suite #7
Burlington, ON
L7R 2J6

Tel: (905) 639-9006
Fax: (905) 632-3337

January 9, 2026

E-mail

City of Burlington
426 Brant Street
Burlington, ON L7R 3Z6

Attention: Jo-Anne Rudy, City Clerk

RE: Committee of the Whole – Development & Growth Management

Statutory Public Meeting: City-Initiated Proposed Official Plan Amendment for Employment Area (DGM-01-26)

Dear Madame Chair and Members of the Committee,

Please accept this letter as a written submission from Emshih Developments Inc. (Emshih) as it relates to Official Plan Amendment 7 (OPA 7). Properties affected by OPA 7 include 901 Guelph Line and 501 North Service Road.

We understand that the City of Burlington is proposing an Official Plan Amendment to the Burlington Official Plan, 2020 and Regional Official Plan, 1995, regarding updated policies to align with the recently updated Provincial Planning Statement, 2024 related to Employment Areas. Emshih is pleased to have the opportunity to work closely with staff through the public engagement process and have had the opportunity to discuss our concerns with staff.

This letter summarizes Emshih's comments and concerns regarding the implications of the PPS 2024 updated definition for Employment Areas on the City of Burlington's employments areas and related policy framework.

- Concern that proposed updates will limit Burlington's competitiveness with new employment attraction and growth
- Employment lands will be limited to manufacturing and warehousing; according to Statistics Canada, manufacturing accounts for approximately 10% of the employment industry in the region
- Limitation on permitted uses will freeze lands from other office and service-related employment uses which make up a larger portion of the employment industry
- Limitation on permitted uses may also constrain existing "non-confirming" uses from expansion; it is unknown if expansions of existing uses will become prohibited as a result of updates to the policy framework

- There are no large swaths of land to support larger scale manufacturing and warehousing uses; Province removed 2 large parcels of employment lands for employment conversion
- Many lands within the employment area are fragmented or limited by existing sensitive uses (encroach within 300m setback per D6 guidelines etc.) therefore will not be able to support the permitted uses
- Prohibited uses (office, commercial and retail not associated with manufacturing and warehousing) will be directed to mixed-use areas where land is much more expensive; land is fragmented and more difficult to assemble and less financially feasible to development for employment uses

Emshih strongly recommends that Committee and Council consider the implications of the proposed updates to the City of Burlington's employment lands policy framework through proposed OPA 7 and defer approval until more information is available. Staff should work closely with the Burlington Economic Development Corporation and other stakeholders that will be impacted by the proposed changes to the employment areas. The growth and prosperity of Burlington's employment lands will be greatly at stake.

We look forward to continued collaboration amongst the City of Burlington and stakeholders.

Sincerely,

Emshih Developments Inc.

Committee of the Whole Report Forecast February 9 & 10, 2026

Note: this forecast is subject to change

Consent Items:

- Reserve Fund request to strengthen municipal resilience (PWS-02-26)

Regular Items:

- Options for the temporary elimination of Development Charges (DGM-03-26)
- Site Plan Control By-law update (DGM-02-26)
- Burlington Ave. and Ontario St. Heritage Conservation District Plan final report (DGM-04-26)
- Heritage response to Bill 23 – Phase II shortlist of designation candidates (DGM-07-26)

Statutory Meeting:

- New Residential Zoning By-law Final Draft (DGM-05-26)