

JOINT LAND NEEDS ANALYSIS AND STUDY

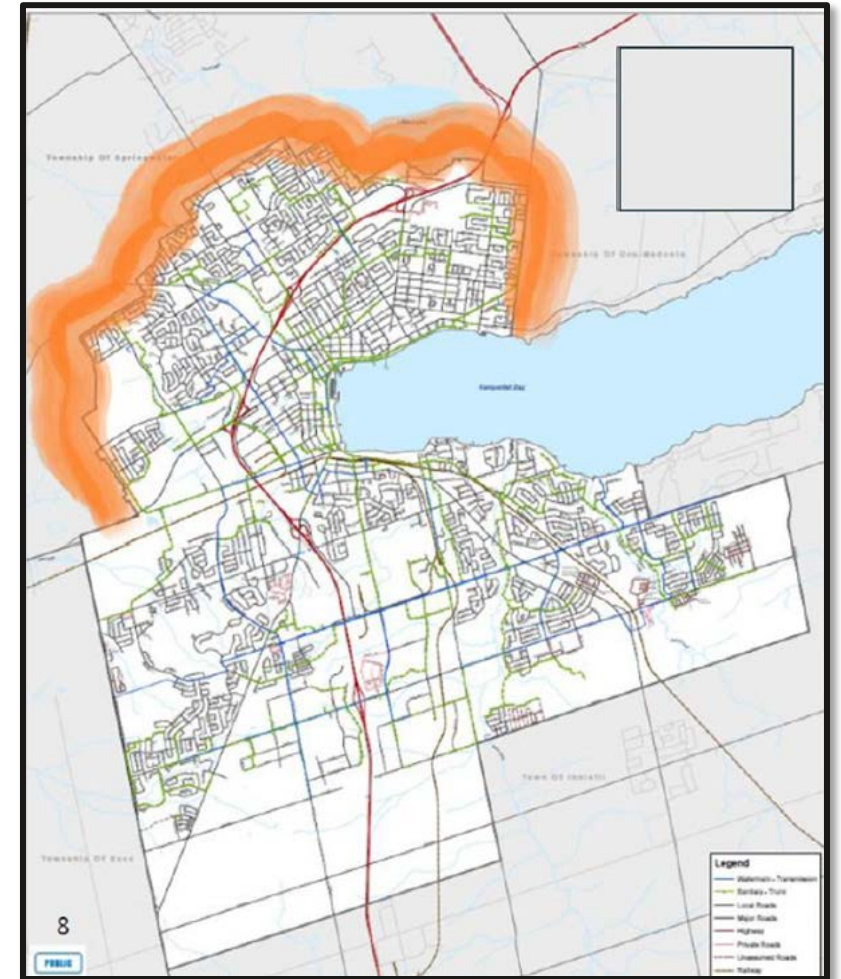
Stage 2 Summary Presentation



December 11, 2024

Key Questions in Joint Land Needs Study

1. Do Barrie, Oro-Medonte and Springwater need additional Community Area and/or Employment Area by 2051?
2. If so, what options are available within the Study Area to accommodate growth?

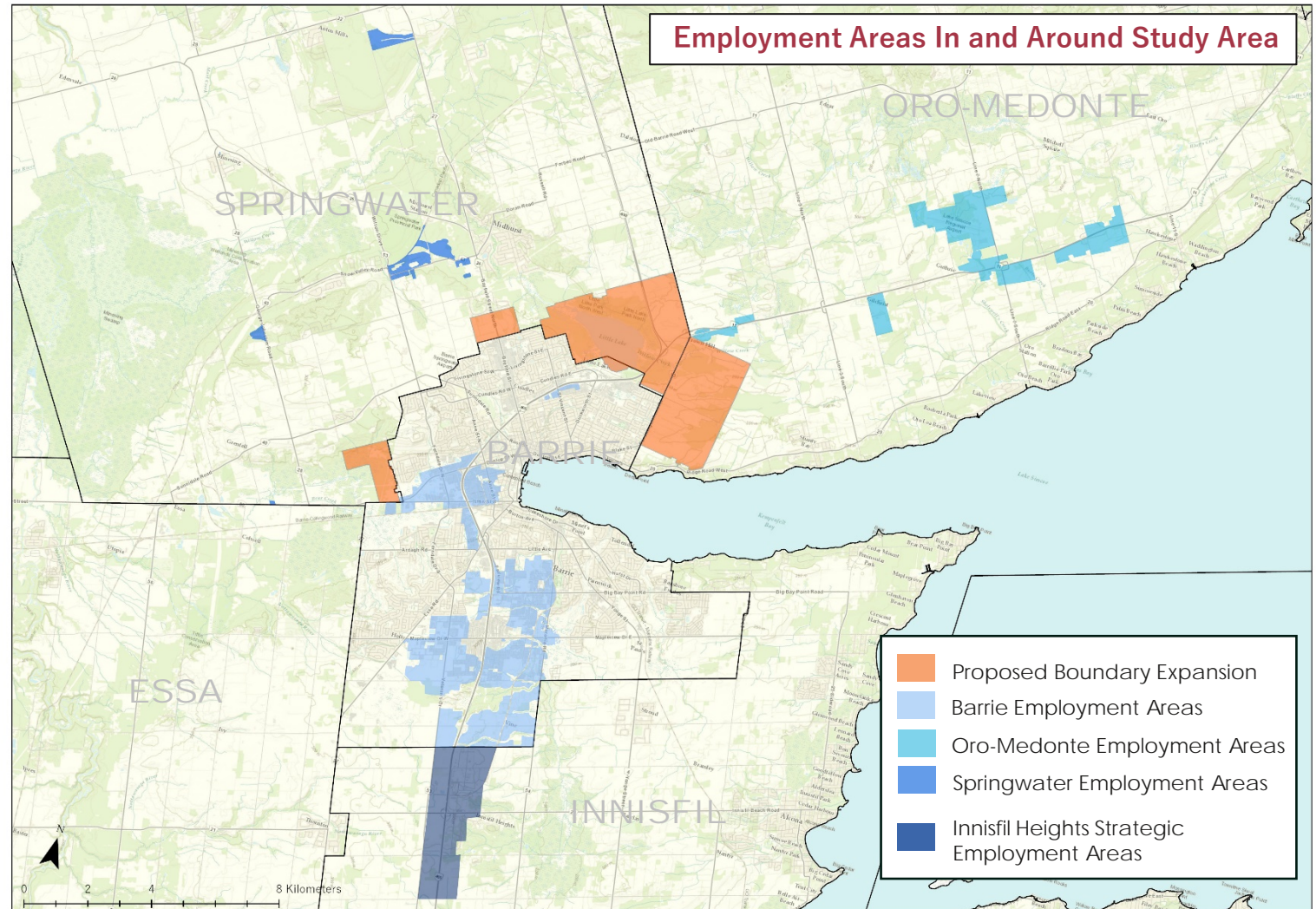


Employment Area Land Needs Assessment



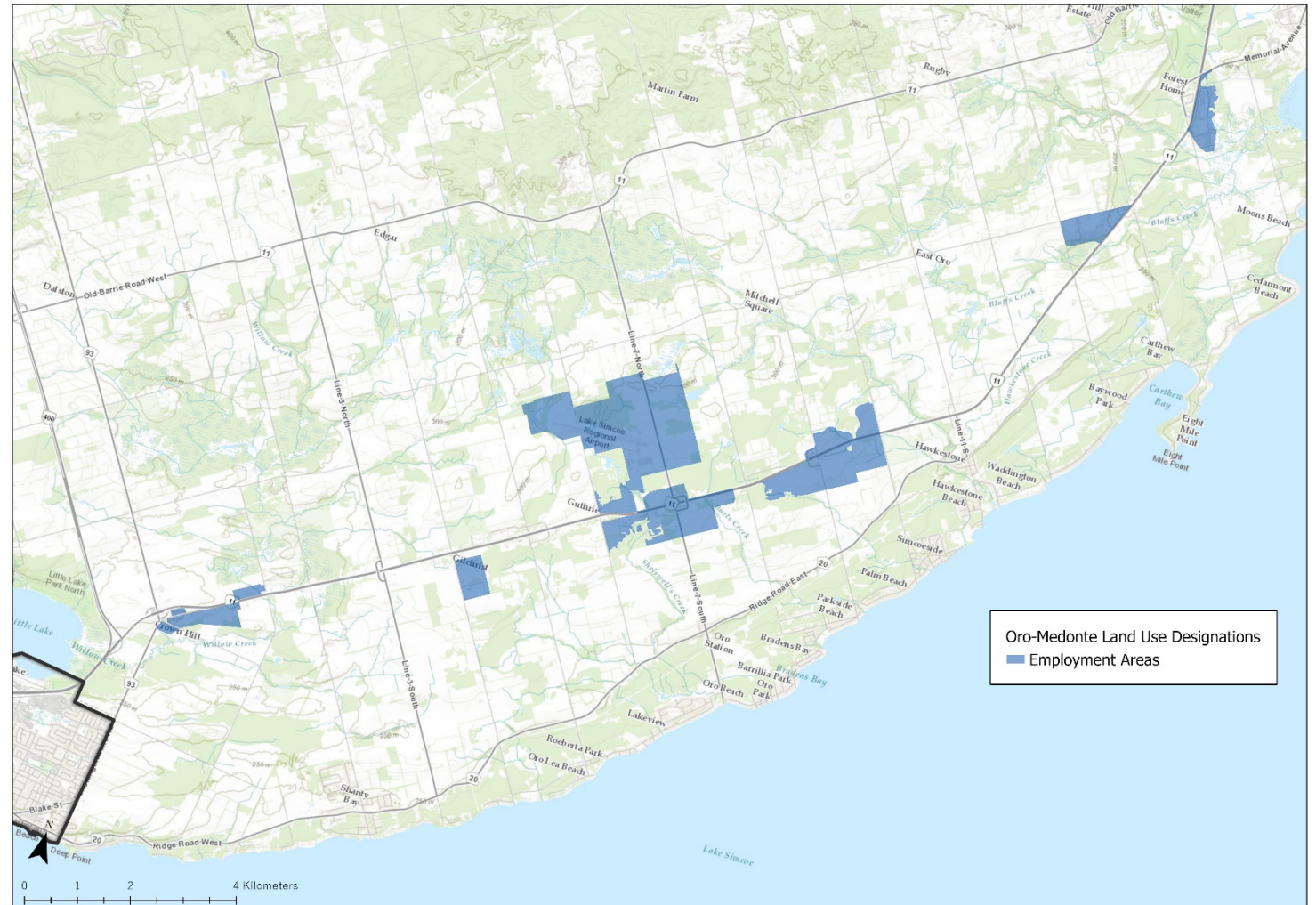
Barrie's Employment Area Land Needs

- Long-term Employment Area supply appears to be sufficient to meet forecast need
- However, short supply of
 - Shovel-ready lands
 - Parcels for expansion of existing users and new large users



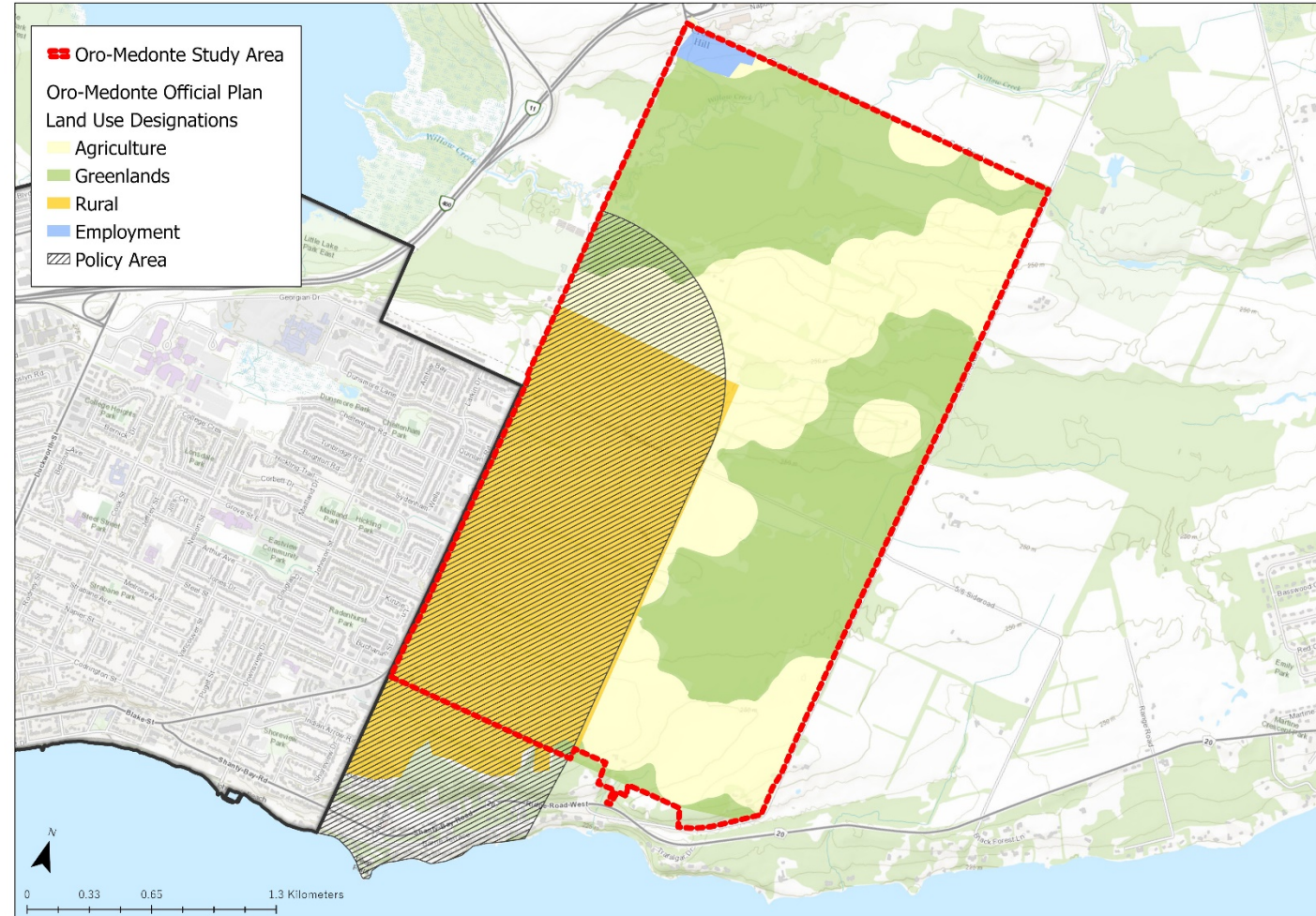
Oro-Medonte's Employment Area Land Needs

- Township has well-located Employment Areas
- County OP premised on current Employment Areas being built out at rural densities
- No shift to “urban” employment land structure
- In line with Oro-Medonte Employment Land Strategy (2020)

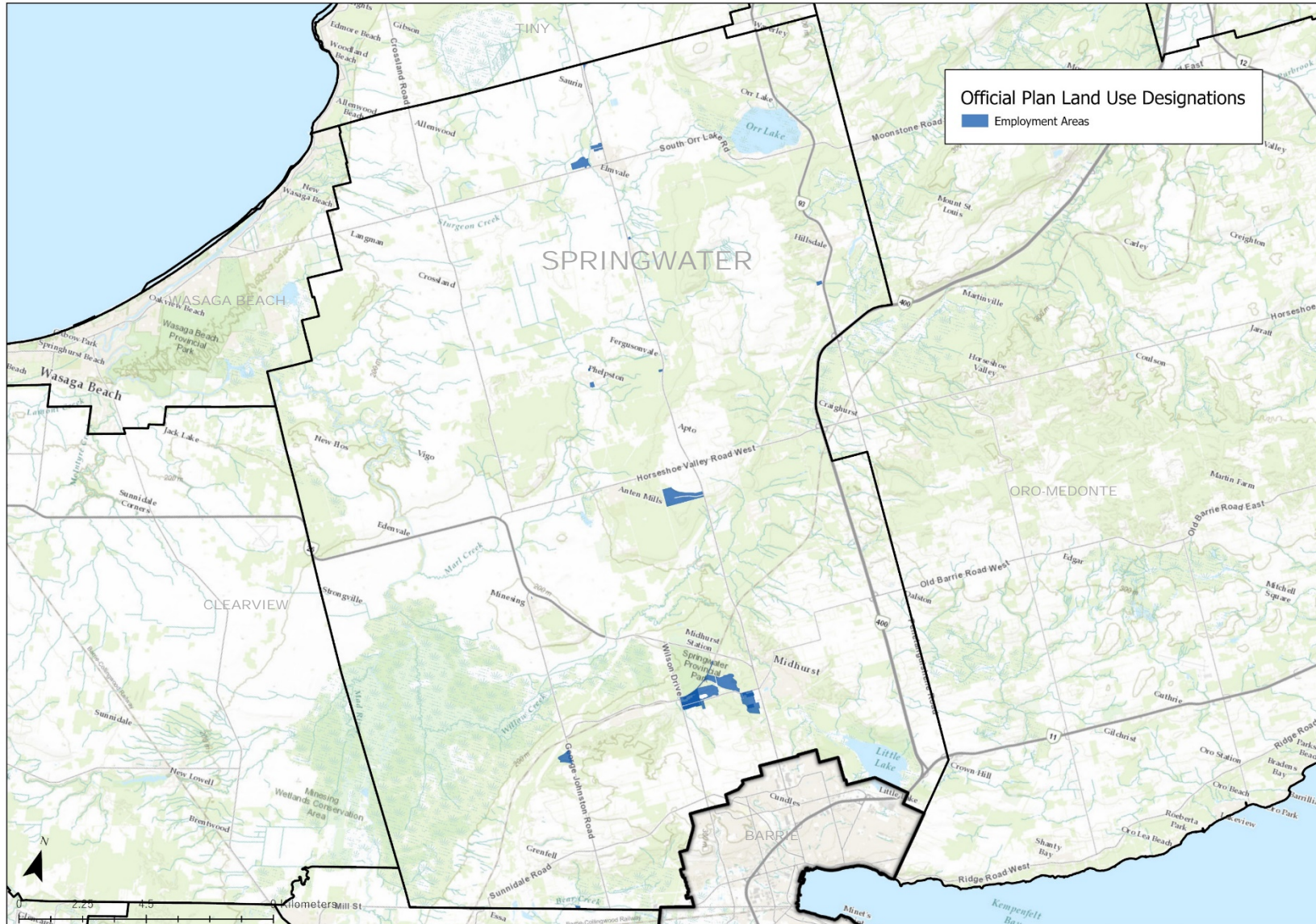


Barrie's Proposal to Oro-Medonte

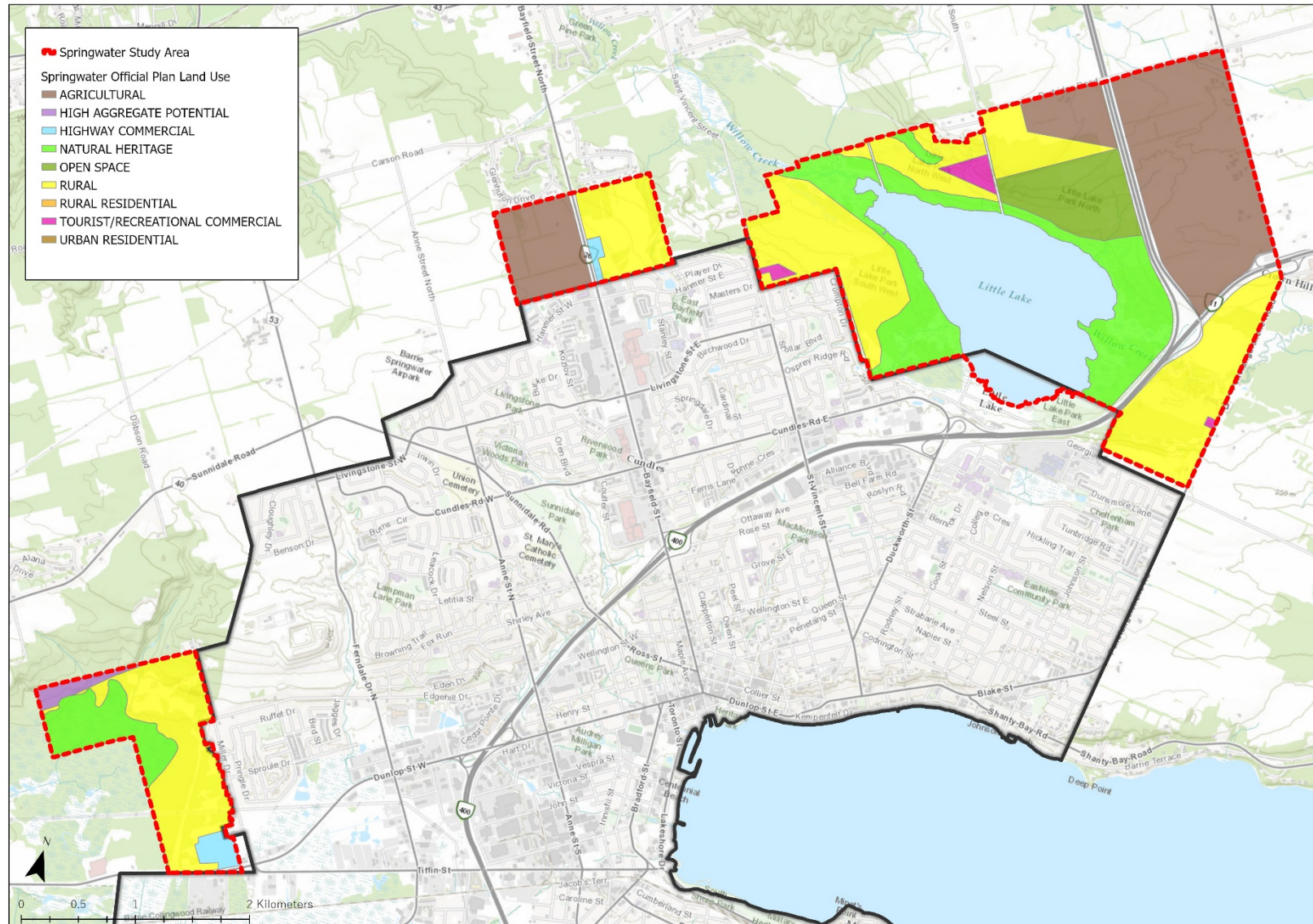
- Barrie's states need is for Employment Areas
- Oro-Medonte staff have indicated need for urban residential uses for higher density housing
- Proposed lands:
 - do not directly address Barrie's lack of "shovel-ready" employment area
 - appear to have constraints, including lack of large employment land parcel opportunities
 - would, if part of Oro-Medonte, represent major new urban settlement area in Township



Springwater's Employment Area Land Needs



Barrie's Proposal to Springwater



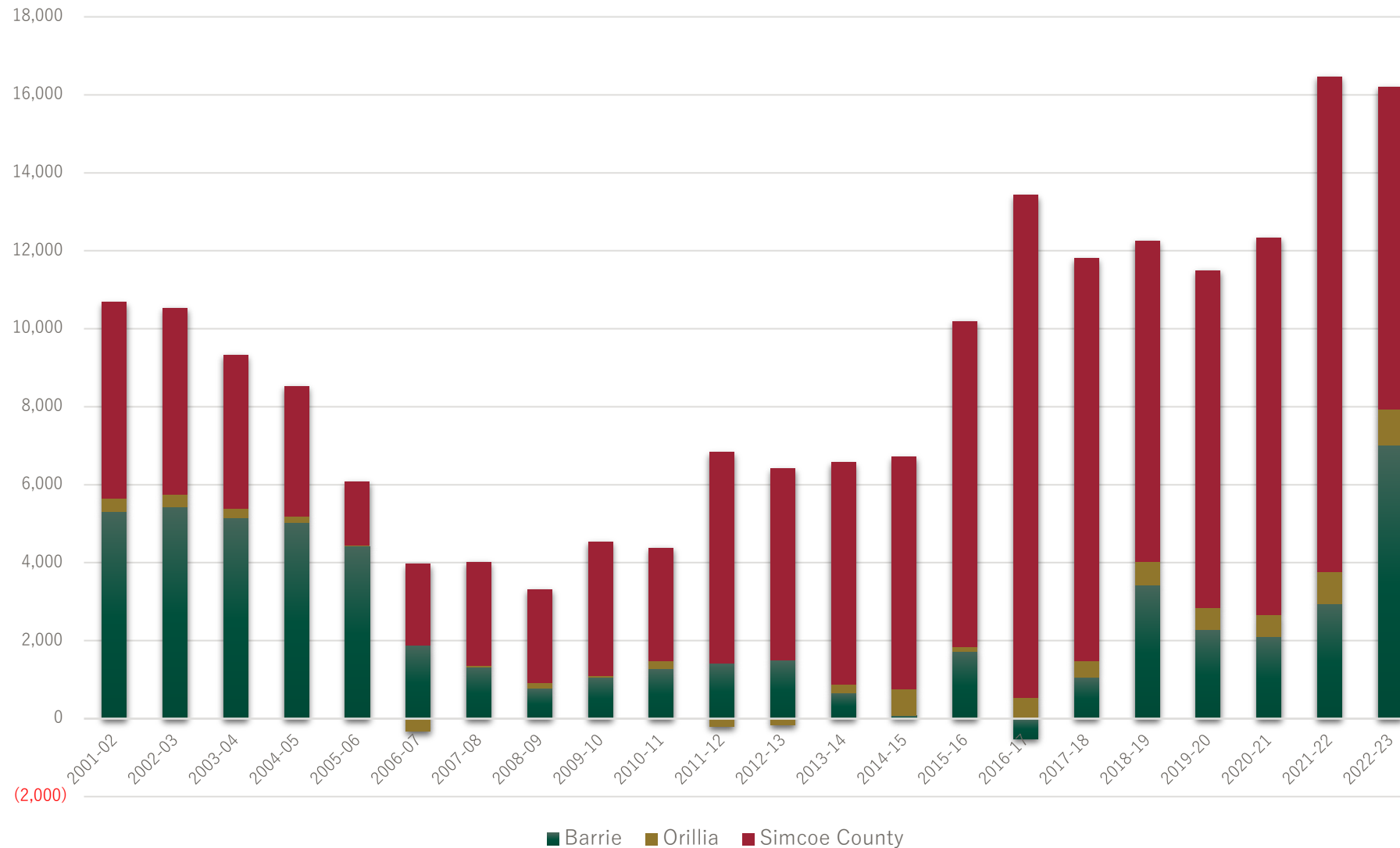
Employment Area Land Needs Assessment Summary

- Strong demand for Employment Areas along Highway 400 to 2051
 - Key corridor for north-south goods movement
 - Demand spans local, regional, national, and international levels
- Proactive planning by local municipalities and County—significant infrastructure investments underway to support Employment Areas
- Barrie's Employment Area supply is sufficient, in theory, to meet long-term demand, though short-term supply challenges persist, particularly for larger parcels
- Limited case for annexing in Oro-Medonte or Springwater for employment-only use as a short-term solution

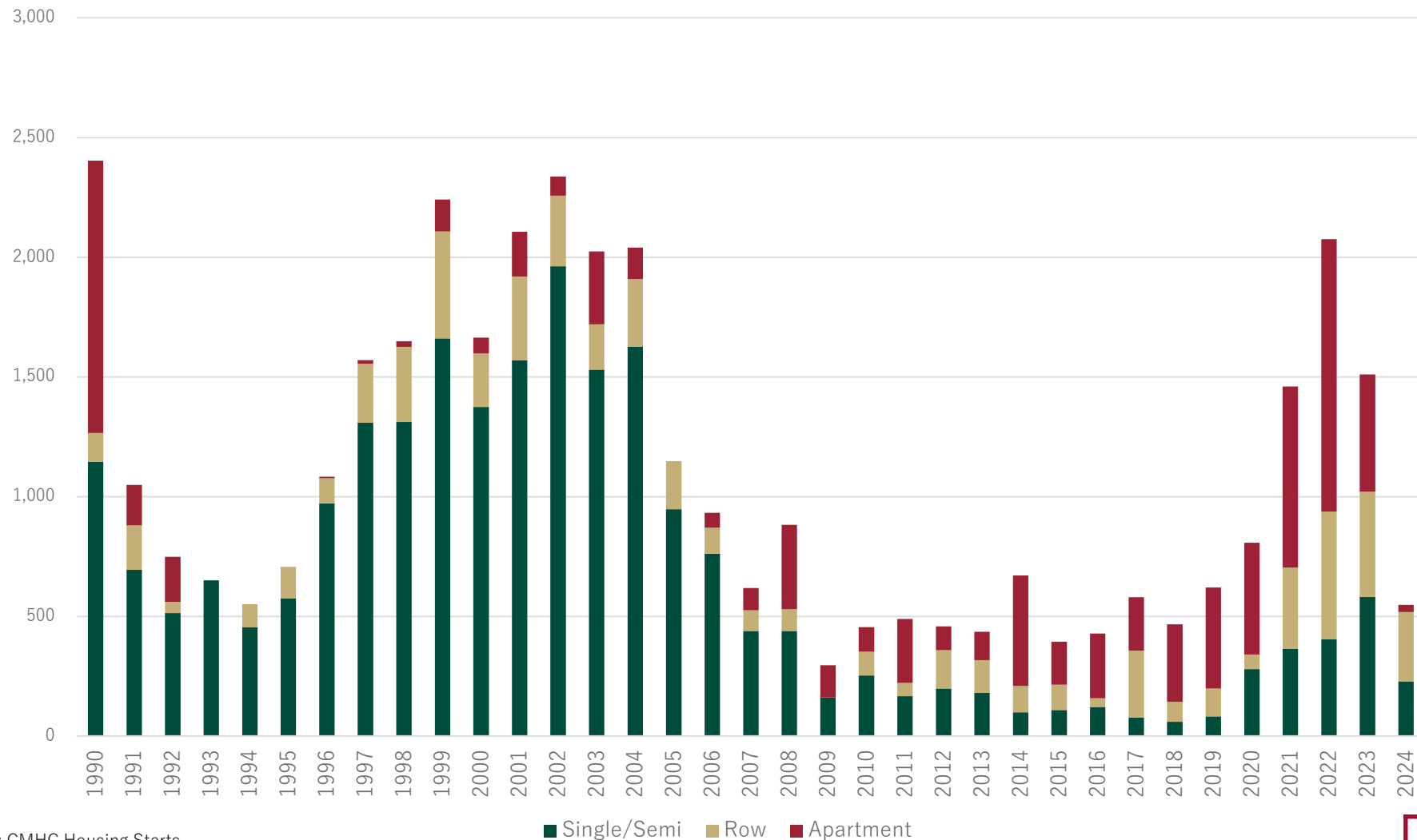
Community Area Land Needs Assessment



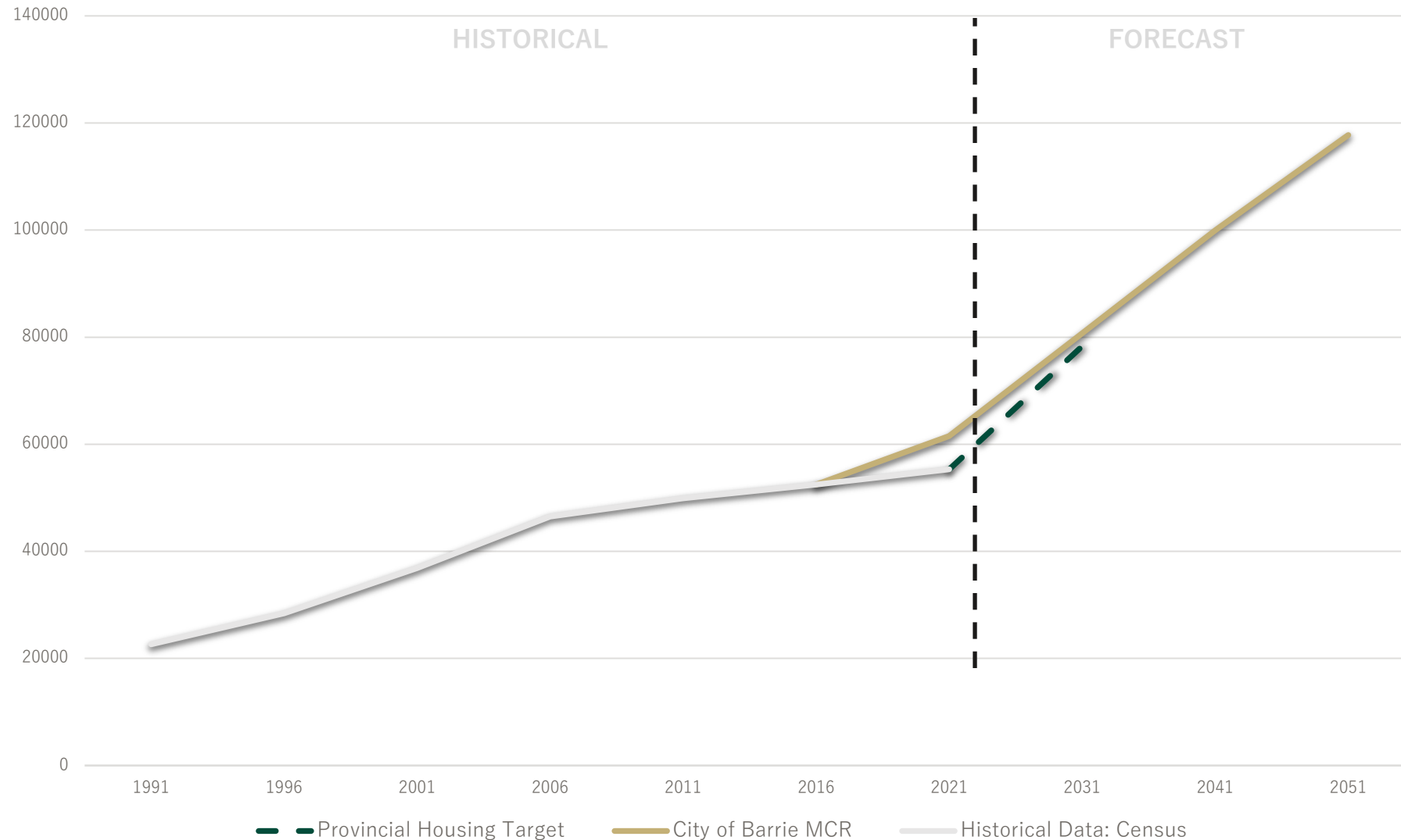
Population Growth in Simcoe Census Division



Barrie's Housing Growth Potential is High But, Like Elsewhere in GGH, Current Growth is Slow

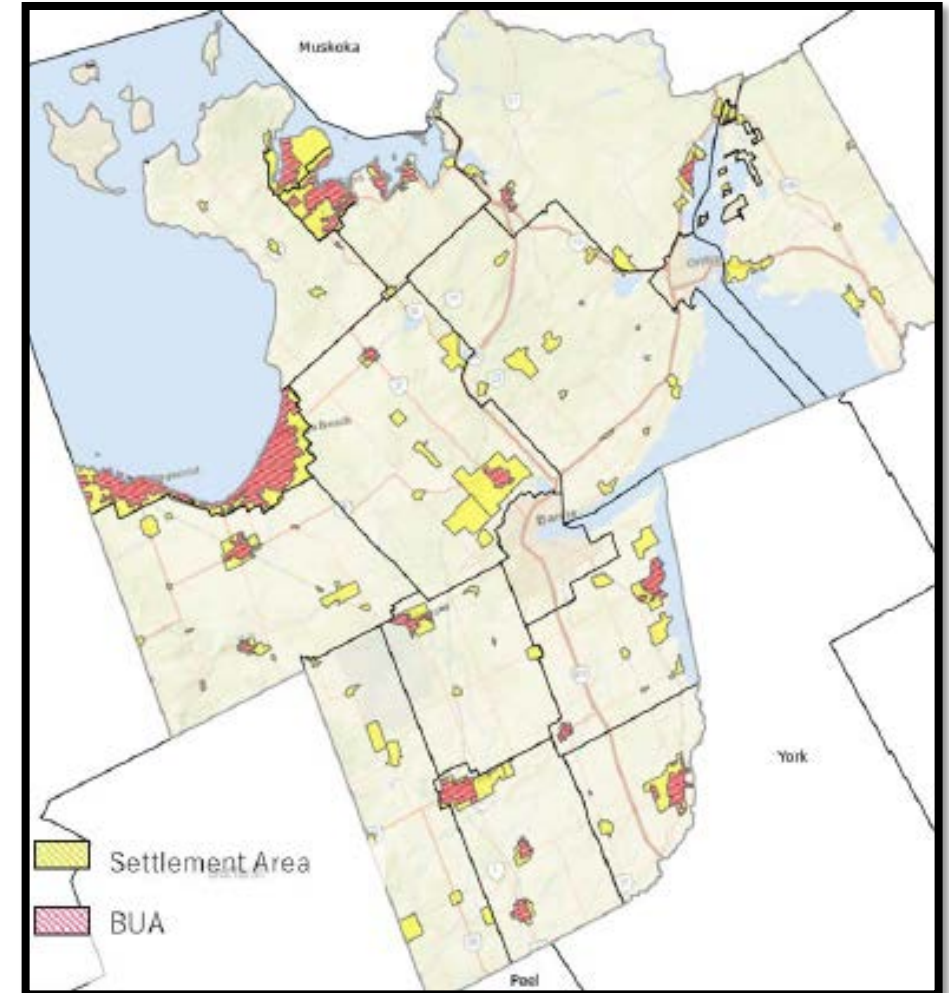


Much More Housing Also Required to Achieve Barrie's 2051 MCR Housing Forecasts



Key Questions – Barrie Community Area Land Needs

- How much intensification can be expected in Barrie?
 - OP commits to 50% of all new homes in Built Up Area (BUA) annually to 2051
- What density can Designated Greenfield Area (DGA) in Barrie reasonably be developed at?
 - Measure is “people and jobs per hectare”

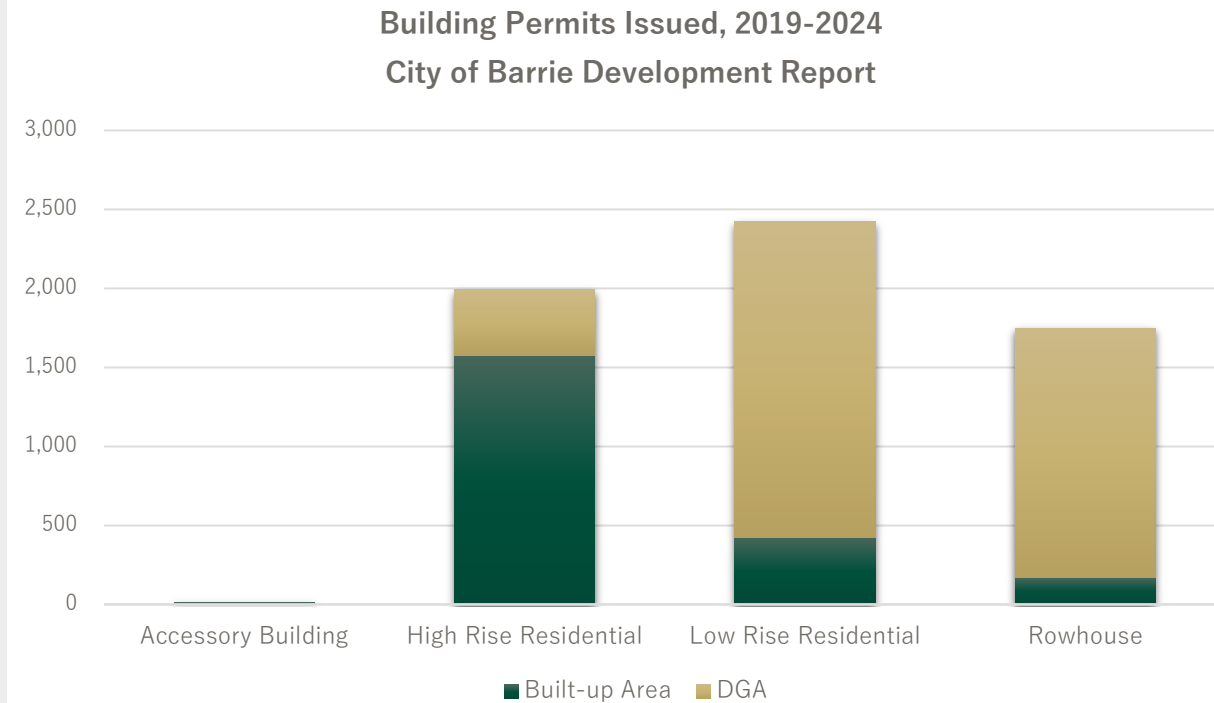


Barrie Updated Housing Needs to 2051

	MCR Forecast (30 years)	Actual (30 years)	Actual (Annual Average)
2021	61,500	55,300	
2051	117,700		
Growth 2021-2051	56,200	62,400	2,100
<i>BUA (50%)</i>		<i>31,200</i>	<i>1,050</i>
<i>DGA (50%)</i>		<i>31,200</i>	<i>1,050</i>

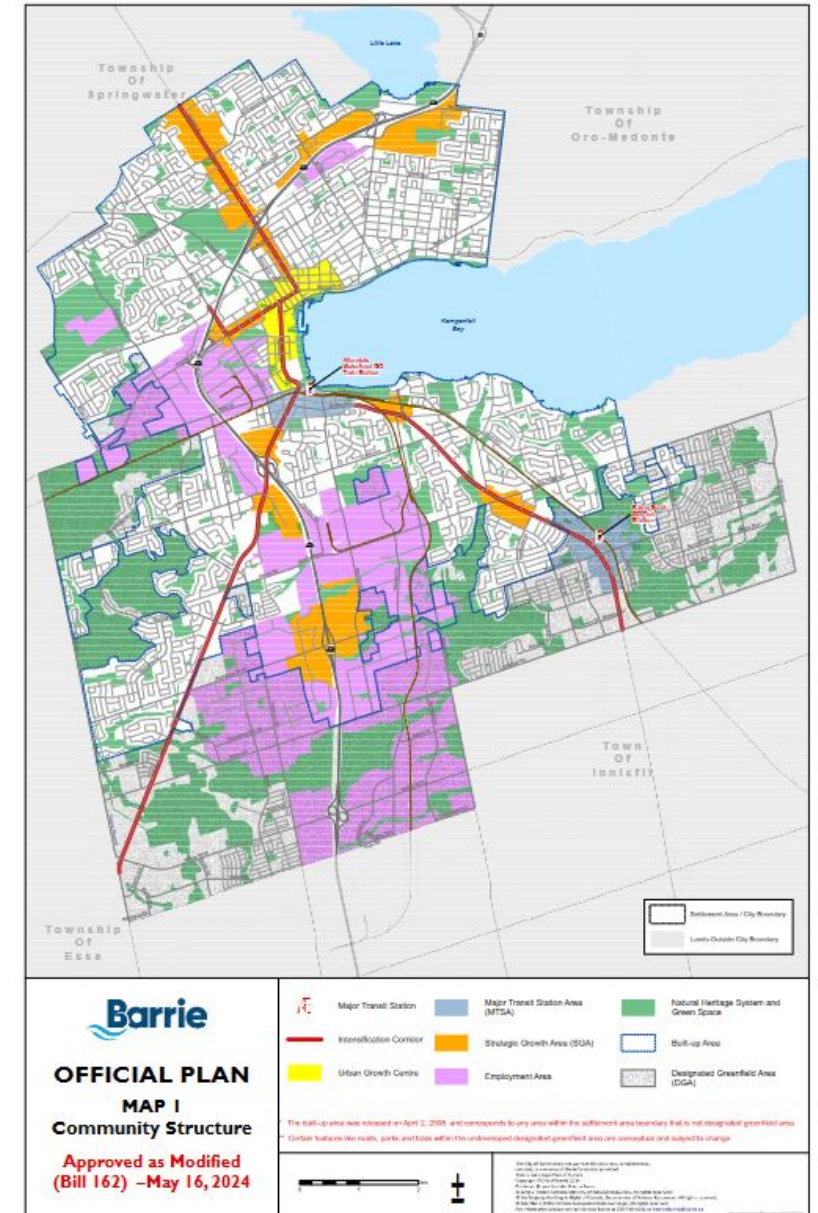
Housing Demand in the Barrie BUA

- OP intensification target is 50% of all new units
 - 31,200 to 2051
 - 1,050 per year
- Intensification performance
 - 35% intensification overall between 2019 and Aug 2024
 - Mostly high-rise apartments

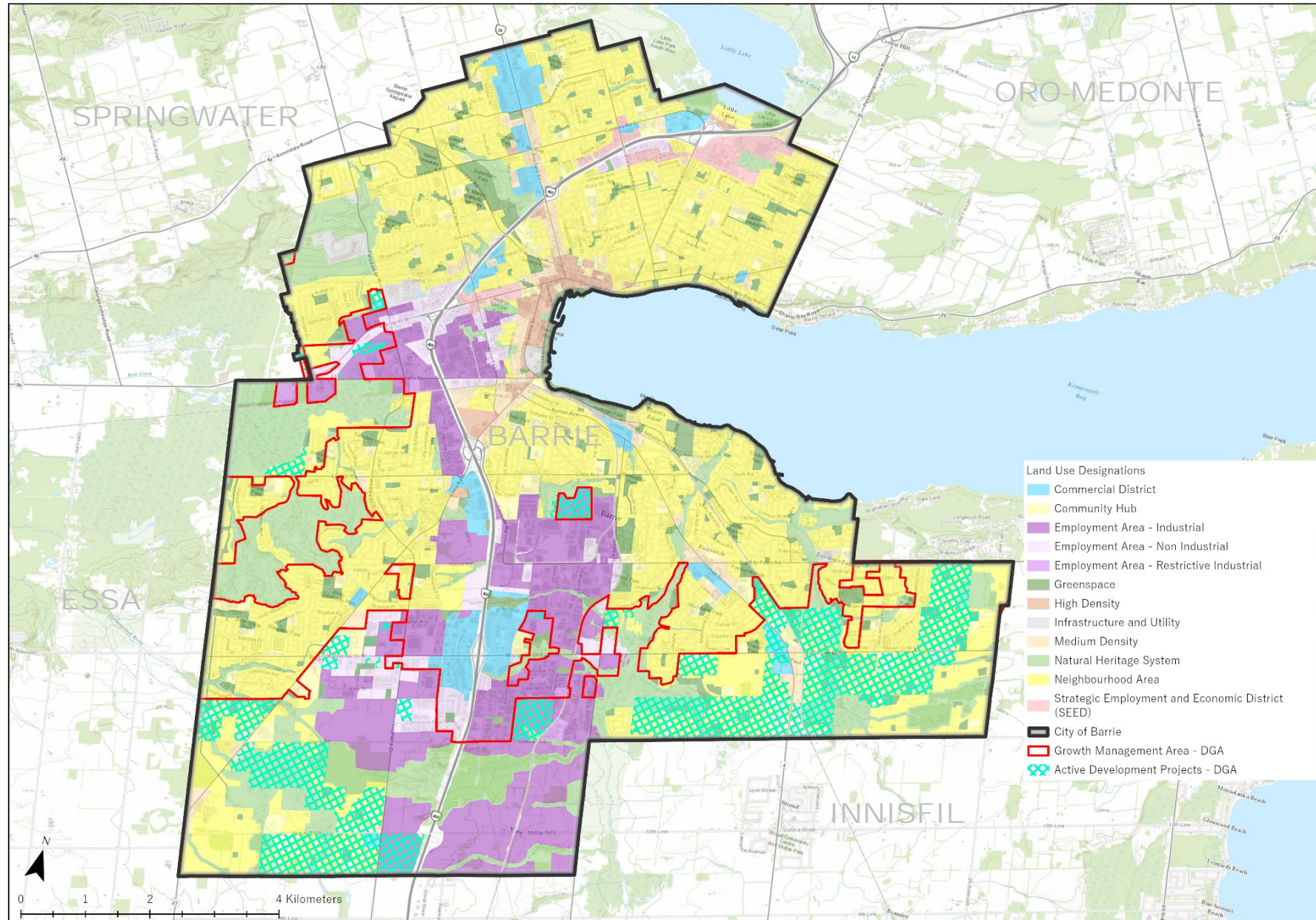


Housing Supply in BUA is Theoretically Sufficient

- 38,400 unit supply identified through MCR
- Focused in Strategic Growth Areas
 - Urban Growth Centre
 - Intensification nodes and corridors
 - Major transit station area
 - Other areas within the built boundary
 - Growth through second units



Barrie's Designated Greenfield Areas



Barrie's Designated Greenfield Areas

- 31,200 units needed in the DGA
- Lands covered by applications
 - Building permits = 4,000 units (11% apartments)
 - Units in applications (not built) = 13,000 (45% apartments)
 - Total = 17,000 units
- Vacant lands (no applications yet):
 - Estimated 351 developable ha
 - Need to accommodate 14,200 units on this vacant land

Designated Greenfield Area Estimated Land Need

	Scenario 1 Barrie Planned Density	Scenario 2 Typical Suburban Density
DGA housing units 2021 - 2051	31,200 units	31,200 units
Units permitted and in planning applications	17,000 units	13,600 units
Remaining units to be accommodated	14,200 units	17,600 units
Vacant DGA lands (no applications yet)	351 ha	351 ha
Assumed density	23 units per developable ha	18 units per developable ha
Potential unit yield	8,100	6,300
Unaccommodated housing units	6,100	11,300
Assumed density	23 units per developable ha	18 units per developable ha
Estimated land need	265 ha	630 ha

Barrie's Community Area Land Needs

- Like other GGH municipalities, Barrie is planning for more compact development and more intensification
- Recent and planned growth suggest that achieving OP targets will be challenging
 - **Intensification** – Current rate is 35%, whereas OP target is 50% and with much higher growth
 - Intensification target rate maintained in both Scenarios
 - **Greenfield Density** – needs to be much higher than elsewhere in GGH and very different from current housing being constructed

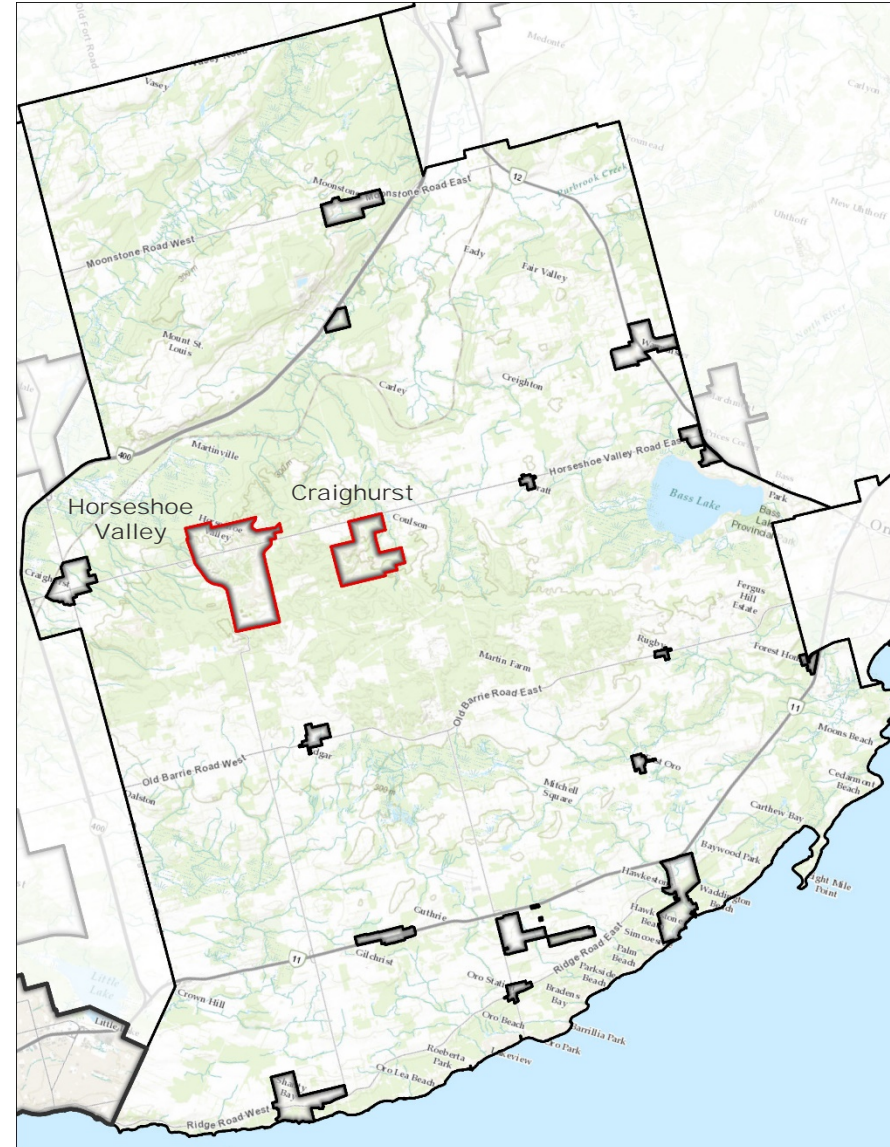
Barrie Density Target for Entire DGA is 79 p+j/ha Would Need Approximately 100 p+j/ha in Vacant Lands

Municipality	Residents and Jobs Per Ha
York Region	
Aurora	55
East Gwillimbury	60
Markham	70
Richmond Hill	70
Vaughan	70
Whitchurch-Stouffville	55
York Region New Community Areas	65
Peel Region	70
Brampton	71
Caledon	67.5
Durham Region	53

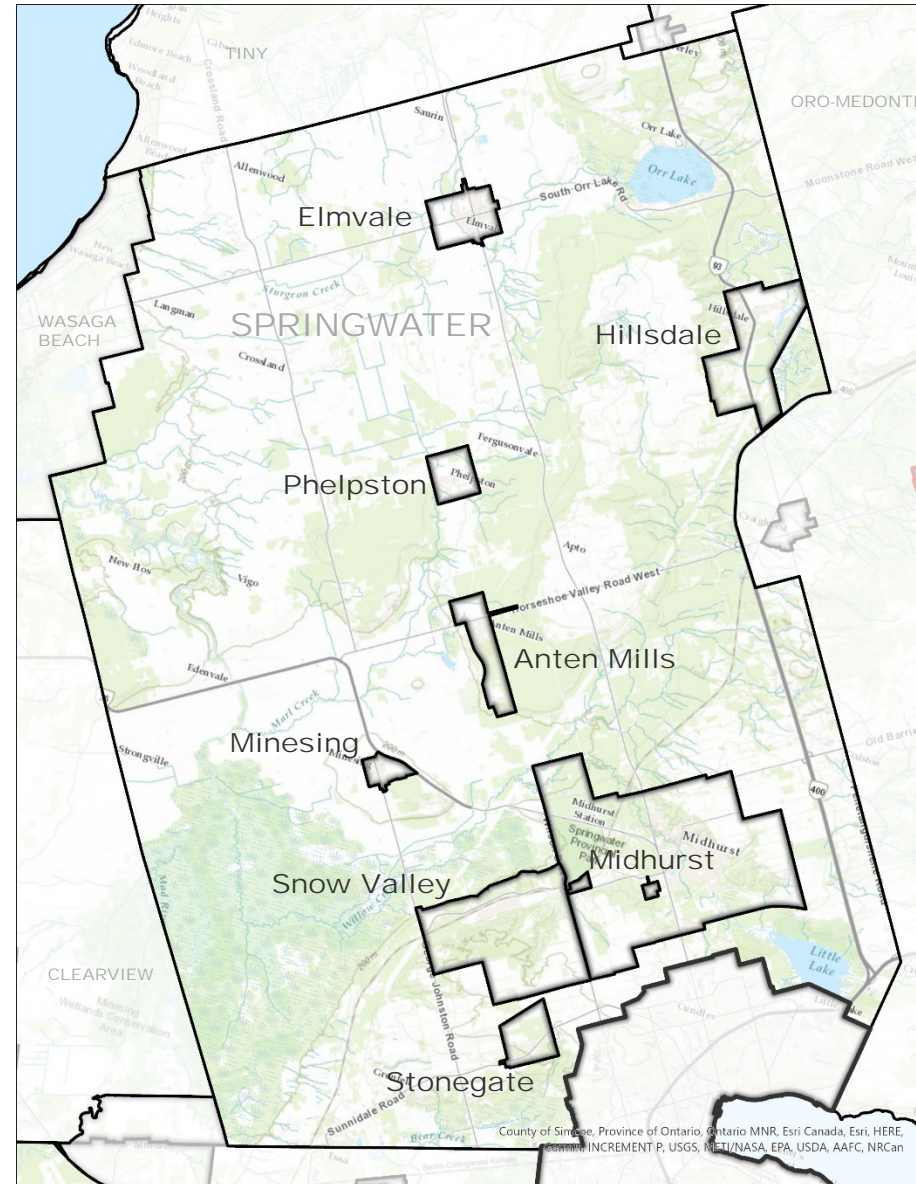
Municipality	Residents and Jobs Per Ha
Halton Region	62
Burlington	76
Oakville	70
Milton	59
Halton Hills	53
Simcoe County	
Springwater	45
Essa	45
Innisfil	55
New Tecumseth	55
Bradford West Gwillimbury	55
Orillia	50

Oro-Medonte Community Area Land Needs

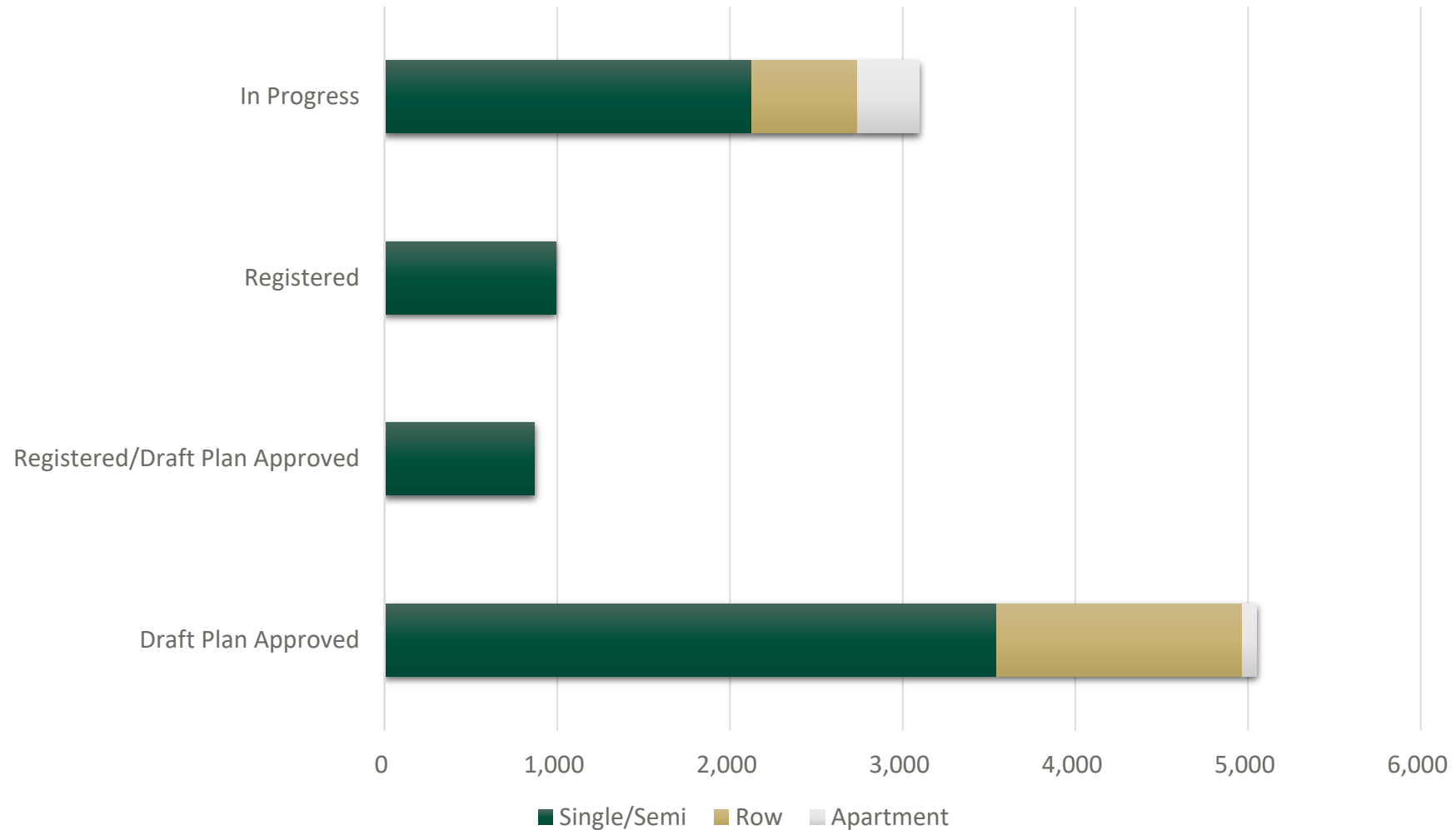
- Majority of growth focused in settlement areas (Craighurst and Horseshoe Valley)
 - Current housing stock is 97% singles and semis
 - County forecast is for 92% singles and semis and 8% other
- Limited growth in rural areas (infilling rural lots of record)
- No shift to more “urban” settlement area structure contemplated



Springwater Community Area Land Needs



Springwater Development Pipeline



Summary of Findings

- Case for additional lands for Barrie is:
 - **Relatively weak** – for only Employment Areas
 - **Relatively strong** – for Community Areas and for comprehensive Community/Employment Area uses
- If undertaking annexation, should consider including Employment as well Community Area lands
 - Allows for a longer-term view for development of complete communities

	Community Area Need	Employment Area Need	Total
Scenario 1 – Barrie Planned Density	265 ha	125 ha	390 ha
Scenario 2 – Typical Suburban Density	630 ha	300 ha	930 ha

25 NB: Employment Area based on approximate ratio of Community to Employment Areas in Salem & Hewitt's Secondary Plans

Two Broad Options for Addressing Land Needs

▪ **Option 1 – Maintain Municipal Boundaries**

- Barrie's residential growth becomes denser and slows by mid-2030s
- Growth in Study Area absorbed by surrounding municipalities
- Over time, would likely require
 - servicing agreements
 - some type of regional governance model

▪ **Option 2 – Adjust Municipal Boundaries**

- Growth would continue to occur in the Study Area
- Would involve annexation of lands to Barrie to accommodate land needs
- Would require comprehensive analysis of potential annexation configurations, and assessment of servicing requirements and fiscal impacts

Next Steps

- Discuss possible Stage 3 work
- Requires expertise in
 - Forecasting and demographics
 - Civil engineering
 - Municipal finance
 - Natural heritage