Brampton Growth Management & Accelerated Official Plan Review Program

Discussion Paper

Population, Housing and Employment Forecasts

January 2005

City of Brampton Discussion Paper - Population, Housing and Employment Forecasts 2005

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OVERVIEW

This discussion paper outlines a range of population, housing and employment forecasts developed with the assistance of Hemson Consulting Limited and discusses the planning context from which these forecast were derived. This paper also highlights a number of strategic issues and presents plausible options for dealing with the City's unprecedented growth levels. The following points summarize the key conclusions:

- The new high growth forecasts best represent current trends in terms of Brampton's share of the GTA growth, particular for the 2011 horizon.
- The emerging 2011 picture is 5% to 9% higher than previously forecasts (up to 46,000 people/ 13,700 units higher).
- The City's recent Development Charges By-law update represents a move forward, however the City and Region 10 year infrastructure forecasts would be advanced by about 3 years to respond to the high growth forecasts.
- Slowing the emerging 2011 growth picture will be difficult due to market trends and existing commitments and approvals.
- Any further commitments to advance residentially designated land should be carefully evaluated (i.e. new secondary plan areas, employment land conversions).
- Current staffing plans for development processing, capital project delivery and population related services are based on low growth forecasts.

PART A: DEVELOPMENT OUTLOOK CONTEXT 2004

1. INTRODUCTION

This discussion paper provides the context for discussion regarding updates to the City of Brampton's population, housing and employment forecasts. The forecasts are to be employed in the context of the City's ongoing Official Plan Review and Growth Management Program (GMP). Consideration is given to recent provincial policy initiatives, the economic climate of the GTA, land supply and the fiscal constraints that municipalities such as Brampton must deal with. With the expertise and assistance of Hemson Consulting Limited, a set of Citywide high, medium and low growth forecasts have been produced that are consistent with the methodology and framework of the recently released "Growth Outlook for the Greater Golden Horseshoe Report" (January, 2005). Hemson is also the key consultant that developed that latter forecast on behalf of the Regional Municipalities of the Greater Golden Horseshoe (GGH) and the Province.

Three growth scenarios are presented representing potential scenarios for the City's growth over the next 25-30 years. The Medium and High growth scenarios have been distributed to Secondary Planning Areas in order to show where active development is forecast to proceed and to evaluate some of the factors influencing the distribution of growth. These distributed forecasts and other information are available in the 2004 Development Outlook Report. Finally this paper will also identify possible avenues for the City to explore in order to address the high rate of growth and the current tools available to the City.

2. BRAMPTON'S GROWTH MANAGEMENT PROGRAM

The aim of the City's Growth Management Program (GMP) approved in 2003 is to promote the timely delivery of services and infrastructure to new residents while maintaining appropriate service levels for existing residents. In order to do this the City requires the active participation of the our 'partners in managing growth' such as the Region of Peel, school boards, conservation authorities and the development industry.

A key component of the GMP is maintaining up-to-date population, housing and employment forecasts by Secondary Planning Area. The annual Development Outlook Forecast provides a single source of detailed short and long-term population and employment forecasts and the anticipated locations and timing of growth to be used by City Departments, the Region of Peel and other agencies for planning and budgeting services and infrastructure.

This Discussion paper is intended to provide new Citywide up-to-date forecasts for the City for use in the approved GMP as well as outline some of the issues around projecting the rate of growth in the City and the distribution of that growth in this time of rapid growth and changing policy framework. Detailed elements of the forecast summarized in this Discussion Paper are included in a new Development Outlook Report prepared concurrently.

3. BRAMPTON LAND SUPPLY

The City of Brampton is 26, 900 hectares (66,469 acres) in total area with the majority of it planned for development and located within the City's existing Urban Boundary. Northwest Brampton, consisting of about 2,428 hectares (6,000 acres), is the only area in Brampton outside the current urban boundary.

Under the current urban boundary, the majority of developable land is under active planning for residential and employment purposes. There are only two significant size Secondary Planning Areas that are not under development or have yet to undertake a comprehensive Secondary Planning Process to facilitate development, including the Highway 427 Industrial lands (SPA 47) and Sandringham Wellington North (SPA 48).

3.1. Residential Land Supply

As can be seen by the table below, the number of residential building permits issued since 1997 has steadily increased with a record number of permits issues in 2004.

Table 1: Brampton Residential Building Permits Issued

	SFD	SDD	TH	APT	TOTAL
1997	1776	689	456	111	**3032**
1998	1590	564	324	112	**2590**
1999	1988	781	470	1	**3240**
2000	2830	1420	892	176	**5318**
2001	3268	1116	476	98	**4958**
2002	4985	972	409	96	**6462**
2003	4733	1466	471	0	**6670**
2004	*7337*	*1315*	*824*	*98*	***9574***

Source: Brampton Planning Design and Development Department, 2005

Feeding the number of building permits issued for new dwelling units is the inventory of registered and draft approved plans. More specifically, once plans are registered, a large portion of the lots have already been sold and building permit applications are submitted soon after registration. As summarized by Table 2 there are approximately 2,511 registered units that have yet to yield building permits.

Table 2: Current Residential Development Inventory*

	Apartment Units	Family Units	Total
Registered Plans (No Permits Issued Yet)	750	1761	**2,511**
Draft Approved Units	100	5,452	**5,552**
Received**	2,250	15,550	**17,800**

** As of December 31, 2004*
*** Includes some Site Plan and rezoning applications notably for downtown Brampton.*
Source: Brampton Planning Design and Development Department, 2005

The majority of active registered plans are located in the east part of the City in Secondary Planning Areas 28 (Springdale), 42 (Vales of Castlemore), 41 (Bram-East) and 49 (Vales of Castlemore North). On the west side of the City, active registered plans are mostly located within SP 44 (Fletcher's Meadow). Between Jan-Dec 2004 the City registered 7627 units amongst 34 different registered plans. The City also draft approved 10 plans of subdivision yielding approximately 2916 dwelling units and received another 21 plans of subdivision applications yielding approximately 4000 units.

Table 3 below illustrates how the inventory of registered and draft approved units has related to the number of building permits that have been issued over the past 4 years. The inventory has been relatively steady since 2001 even with the increase in the number of building permits, with the exception of 2004. As of the end of 2004, the number of draft-approved units has diminished, leading to a smaller inventory of registered and draft-approved units largely due to the substantial number of building permits issued in 2004 and significant decrease in the number of new draft approved units in 2004.

Table 3: Historical Development Inventory Vs. Present

Year	Bldg Permits/Year	Registered Units	Registered Inventory	Draft Approved Units	Draft Approved Inventory	Total Draft Approved & Registered Plan Inventory
2001	4958	4754	4289	3848	9388	*13,677*
2002	6462	6483	4310	7405	10310	*14,620*
2003	6670	6818	4458	6771	10263	*14,721*
2004	*9574*	*7627*	*2511*	*2916*	*5552*	*8,063*

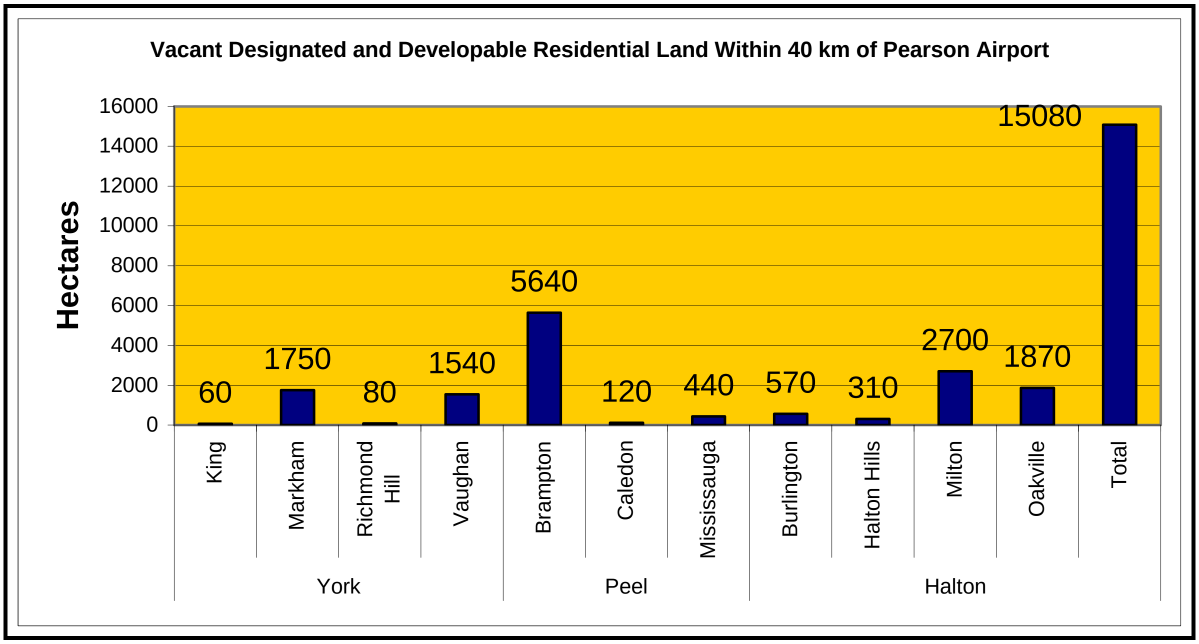
Source: Brampton Planning Design and Development Department, 2005

Although the supply has diminished, this is in part due to the rush to obtain building permits before the end of 2004 to avoid increased Development Charges. The City anticipates a steady flow of new applications to maintain a supply of registered and draft approved units.

Table 4 below illustrates the residential land supply in Brampton relative other nearby GTA municipalities in mid-2004 as identified by Malone Given Parsons in a recent study undertaken on behalf of the Urban

Development Institute. Brampton with over 5,600 hectares of designated and developable land has over 37% of the supply within 40 km of Pearson Airport.

Table 4: Developable Residential Land Brampton and the GTA



Source: Malone Given Parsons, July 2004 "Analysis of Land Supply in the GTA – Hamilton Area"

Understanding that the GTA-Hamilton Area is expected to see an additional 2.4 million people by the year 2031 (about 1.2 million additional units), even with substantial infill and intensification, the Malone Given Parsons study identifies a current shortfall of over 29,000 hectares of developable residential land in the GTA- Hamilton Area.

Given the shortfall in GTA-Hamilton land supply, Brampton with by far the largest share of available land is expected to see a disproportionately high share of growth pressures in the coming years.

3.2. Employment Land Supply

The current supply of designated land for employment land development (i.e. industrial parks, major office, manufacturing and warehousing) is summarized in Table 5:

Table 5: Brampton Employment Land Supply (Hectares)

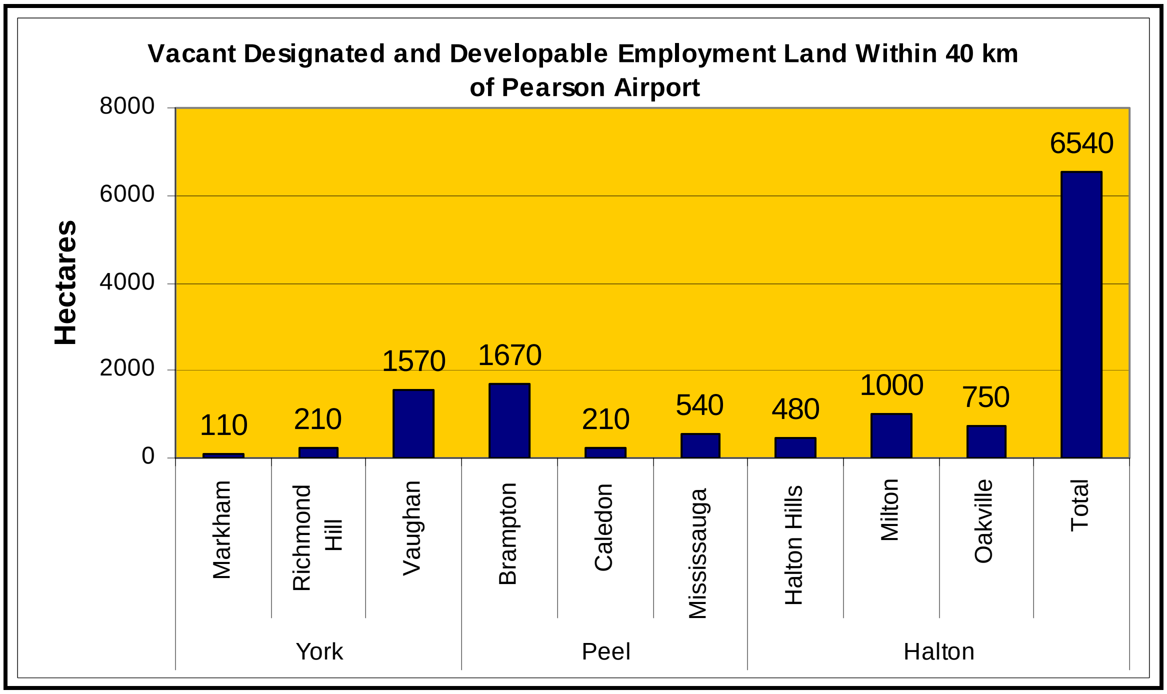
Total Designated Employment Land	**5510**
Total Occupied Employment Land	**1915**
Vacant Within Built-up Areas	1835
Vacant Greenfield Areas	1760
Total Vacant Employment Land	**3595**

Source: Brampton Economic Development Office, October 2003

The available supply of developable employment lands should be sufficient to meet demands for employment growth in Brampton consistent with the projections within our current urban boundary maintaining about a 2:1 ratio between population growth and employment growth.

However, to meet GTA- Hamilton needs for employment lands to the year 2031, Malone Given Parsons has identified a shortfall of about 2,560 hectares of greenfield employment lands in the GTA-Hamilton area. Brampton's supply of greenfield employment land relative to adjacent GTA municipalities is outlined in Table 6. Brampton has over 25% of the supply within 40 km of Pearson Airport.

Table 6: Developable Employment Land Brampton and the GTA



Source: Malone Given Parsons, July 2004 "Analysis of Land Supply in the GTA – Hamilton Area"

4. PROVINCIAL POLICY

4.1. Current Policy

Under the current Provincial Policy Statement issued under the Planning Act, land-use patterns must provide for industrial, commercial, residential, recreational, open space and institutional uses to promote employment opportunities and for the appropriate range and mix of housing to accommodate growth projected for a time horizon of up to twenty years. In larger regions such as within the Greater Toronto Area it may be necessary to look at time horizons longer than 20 years to properly plan for infrastructure. The current provincial policies also require that municipalities have regard for the long-term economic prosperity to be supported by providing a supply of land to meet long term demographic and market requirements of the current and future residents. The current policy regime also requires that municipalities maintain at all times at least a 10-year supply of land designated and available for new residential development and residential intensifications; and at least a 3-year supply of residential units with servicing capacity in draft approved or registered plans. At a rate of 6,500 units per year the City has approximately 1.24 years of supply in draft approved and registered plans.

4.2. Recent Provincial Policy Initiatives:

The past ten years have seen enormous changes for municipal government in Ontario, seeing widespread restructuring, a new assessment and property tax system and a new *Municipal Act*, all fundamentally shifting how municipalities in Ontario are constituted and operated. There were wide ranging reforms to planning, a revised *Development Charges Act* and the beginning of the Building Strong Communities initiative. Significant changes in 1991 to the *Development Charges Act* also reduced significantly the ability for municipalities to recoup the full costs of growth.

While undertaken for entirely different reasons, the largest effect on planning from the reforms of the 1990s was probably the indirect results of the assessment and property tax reform. In particular, the long held view that non-residential development was of great net fiscal benefit to a municipality and that residential development was a disbenefit is now increasingly in question as the benefit “gap” between the two major classes of land use has very significantly narrowed. This will continue to have significant implications for land use planning decisions.

Since the election of a new provincial government in the fall of 2003, their attention within the municipal sphere has now turned very much to planning and growth issues. The results of these initiatives will affect future growth in Brampton and how the City will need to plan to accommodate this growth. The key initiatives are the following:

- Creation of the new Ministry of Public Infrastructure Renewal charged with managing and coordinating the province’s investments in capital works. These investments are of great importance to growth and planning, as they will include transportation, education, health and water and wastewater services. These investments are to be guided by a series of infrastructure plans, now to be released in early 2005. In the Greater Golden Horseshoe (GGH) area, provincial initiatives will also be guided by a growth management plan, the proposed result of the “Places to Grow” discussion paper released in July of 2004. How these initiatives are eventually implemented is bound to have a great deal of effect on growth management within the City of Brampton.

- The *Greenbelt Protection Act* was introduced in December of 2003 to provide time to study and for the new government to consider and implement a new greenbelt within the Golden Horseshoe area. Urban boundary expansions were prohibited for one year (now extended to March 2005) in the study area (the Greater Toronto Area as well as the segments of the Niagara Escarpment, Oak Ridges Moraine and specialty crop lands outside the GTA). The only major expansion in the GTA that might otherwise have been considered during this time would have been Northwest Brampton.

  In October 2004, the Province released a Draft Greenbelt Protection Plan and associated legislation (Bill 136). The Draft Greenbelt Protection Plan would help reduce sprawl in the GGH by protecting from development 1.8 million acres of land including the Niagara Escarpment, Oak Ridges Moraine and other protected rural areas. The Greenbelt does not appear to include lands in Brampton other than the Credit River Valley.

- The *Strong Communities Act* makes a number of changes to the *Planning Act*, most of which are minor in the context of the Brampton growth management issues. The two changes of some greater importance are:

- Planning decisions are now held to a higher standard and must be "consistent with" the Provincial Policy Statement rather the previous "have regard for;" and
- Prevents appeals to the OMB of urban expansions that are opposed by elected municipal governments.

This latter item means that since the Northwest Brampton urban boundary expansion requires the approval of the Region of Peel, there would be no avenue to appeal to the OMB by landowners or the by the City in the event that the Region refuses an OPA application. At the same time, this provision would not supercede the Region and City obligations to provide an adequate land supply in accordance with the Provincial Policy Statement.

- A draft of a proposed new Provincial Policy Statement under the Planning Act was released in the spring of 2004. While there are a large number of differences from the current PPS, probably the most important for Brampton's long term growth management is that it continues the long-standing obligation of the City to provide for:

    - 10 year supply of land designated for new residential development and intensification;
    - 3-year supply of residential units with servicing capacity in draft approved or registered plans.
    - Significant proportion of growth to be accommodated through intensification and infill.

- OMB reform is also on the agenda and while whatever reforms may ultimately be undertaken will affect Brampton's growth and development, it if far too early to speculate on what reforms the government might undertake and how they might affect future decisions in Brampton.

- In July of 2004, the province released a discussion paper entitled *Places to Grow* which represents the first step toward a growth management plan for the Greater Golden Horseshoe (GGH)[1] area. From the provincial perspective the idea of the growth management plan is to direct infrastructure investment and provincial planning policy in the GGH from a single consistent set of objectives. While it remains early in the process, there are a number of strong themes in the document that are notable for Brampton:

    - Most of the growth within the GGH is to be directed to the GTA—Hamilton[2] area (rather than a more dispersed growth pattern to areas beyond the Escarpment/Moraine).
    - Municipal planning must place a greater focus on providing for growth through intensification and redevelopment within existing urban areas.
    - Urban boundary expansions will be necessary in some communities to accommodate the significant levels of growth expected.
    - Planning and infrastructure investment must be better managed and coordinated within and between the provincial and municipal governments.

It is clear there are a large number of provincial initiatives, which will be affecting future growth and growth management in the City of Brampton. None are fully implemented and some are only in their infancy. It

[1] The Greater Golden Horsehoe is the province's new planning term for the portions of southern Ontario within the Places to Grow growth management plan area. This includes the GTA—Hamilton and surrounding areas from Northumberland to Simcoe to Waterloo and south to Niagara.
[2] For most planning purposes Hamilton is now being included as part of the GTA, so the metropolitan context for Brampton is now generally defined as GTA—Hamilton.

would be purely speculative to suggest the detailed conclusions of these initiatives. At the same time, it is very clear that the provincial approach is to provide a clear direction for planning policy and public/private investment, not to turning the system upside down. The City of Brampton can and should proceed with its long-term planning, growth management and official plan review; although the City must continue to monitor the shifts in provincial direction and policy as these initiatives are implemented.

5. GREATER TORONTO AREA CONTEXT

Emerging from a lengthy recession in the 1990s, the GTA has experienced over five years of rapid economic growth. For municipalities, the effect has been most obvious in rapid housing growth and the inability to provide sufficient infrastructure to keep up with the growth. These issues are well known to the City of Brampton, as the City has now become by far the largest market for ground-related housing in the GTA--Hamilton. All indications are that employment growth has also continued to be very strong in Brampton.

Brampton has emerged in the current decade under such great growth pressure due to the confluence of a number of factors:

- Over the past several decades, growth, especially job growth, has been increasingly concentrated in the western part of the urban area, rather than to the east. Today, the "centre of gravity" of the GTA is as likely to be considered Pearson Airport as opposed to downtown Toronto. Brampton is well placed in this context, both to attract employment growth and to attract residential growth seeking access to the jobs in the western GTA.

- Mississauga has now largely built out its supply of greenfield land to accommodate ground-related housing. As Mississauga's presence in the market declines, the pressure on Brampton will inevitably increase (just as the building out of Etobicoke affected Mississauga 30 years ago). As result, pressure will continue on Brampton.

- The current housing boom has now been larger and more sustained than the housing boom of the late 1980s. This has been the result of a combination of demographic factors, employment growth, relative economic stability and low interest rates. Historically low interest rates have had the particular effect of making housing very affordable. Brampton, in particular, has been providing a significant part of the GTA's supply of affordable ground-related housing.

- Brampton has a very large supply of land for both residential and employment development owing to the large urban boundary expansion in the 1993 official plan and there are few servicing constraints in the City relative to other communities. Southern York Region is currently limited in growth by delays in trunk servicing, meaning that a significant amount of development in Vaughan and Richmond Hill is held up awaiting servicing. Halton is currently constrained by land supply everywhere except in Milton. These limitations to the east and west of Brampton increase the growth pressure on Brampton.

While housing markets are always cyclical and the current boom is likely to subside somewhat over the next year or two, none of the factors listed above are likely to change significantly in the next few years. Brampton will continue to experience high levels of growth pressure.

Steps are being taken in the GTA--Hamilton to address growth pressures, that is, to improve our ability to cope with the pressures. The GTA—Hamilton growth pressures are certainly much of the backdrop to the provincial planning initiatives currently being undertaken.

As a basis for long-term planning in the GTA, the upper-tier municipalities of the GTA—Hamilton and the Province of Ontario have recently completed a new set of long-term population and employment forecasts for the GTA-Hamilton and its six constituent upper tiers. The document titled "The Growth Outlook for the Greater Golden Horseshoe" outlines forecasts that will serve as input to provincial, regional and local initiatives in infrastructure planning and growth management. In short the forecasts indicate that the GTA—Hamilton, including Brampton, will continue to experience rapid growth to 2031, even though the rate of growth is expected to slow as the population ages.

6. REGION OF PEEL CONTEXT

The City of Brampton also lies within the market and policy context of the Region of Peel. From a market perspective, Brampton now possesses the vast majority of the supply of designated land in the Region for both ground-related residential development and for employment development. Mississauga's supply of land for lower density housing is nearly exhausted today and the remaining supply of employment land will be nearly exhausted by the end of this decade. To the north, the Town of Caledon has a small supply of designated land for development, which is rapidly developing. This leaves Brampton as the primary location within the Region to accommodate growth and, as a result, it will be accommodating most of the Region's growth for the life of the current Regional Official Plan to 2021.

The recently released Growth Outlook Report estimates that the Region of Peel will grow to 1.61-1.64 million people by 2031. When this number is compared with the forecasts of the individual municipalities of the Region, a disparity of 100,000 people is apparent. As can be seen in Table 7, the separate growth forecasts for the individual municipalities show a total population of 1.51 million by 2031 compared to the 1.61-1.64 million called for by the Growth Outlook Report. The Province should recognize this disparity because it suggests that taken as a whole the three municipalities are not currently planning for the growth depicted by the Growth Outlook Report. A similar gap, although smaller, can be seen between the employment forecasts of the individual municipalities and the Growth Outlook Report

Table 7: Individual Municipal Growth Forecasts

Year	Peel		*Caledon		**Brampton		***Mississauga	
	Pop	Emp	Pop	Emp	Pop	Emp	Pop	Emp
2001	988,948	534,600	50,595	19,000	325,428	133,600	612,925	382,000
2006	1,185,874	637,100	58,000	23,000	426,374	176,100	701,500	438,000
2011	1,313,179	722,600	67,000	26,000	524,379	227,600	721,800	469,000
2016	1,418,142	774,300	76,000	30,000	612,542	263,300	729,600	481,000
2021	1,480,301	808,000	84,000	33,000	661,701	289,000	734,600	486,000
2031	1,511,031	841,800	84,000	33,000	682,031	322,800	745,000	486,000

** Source: Region of Peel Planning Department March 2003*

*** Source: Hemson Consulting Sept 2004 (High Growth Scenario)*

**** Source: Mississauga Planning and Building Department November 2003, includes Census undercount*

Brampton's role in accommodating growth in the Region is clearly shown by the Region's own forecast updated in the Official Plan in 2003. What these forecasts also show is that the current urban boundary is unlikely to be able to accommodate the anticipated growth in the Region to 2031. Initially this would indicate sufficient land demand to allow development of Northwest Brampton, but would also suggest a need for additional urban land beyond Northwest Brampton. Of course with two fully urbanized municipalities, this would only leave Caledon to accommodate further Greenfield growth in Peel. Although Caledon has not historically embraced the idea of accommodating significant amounts of growth, the excess Peel growth demand could also shift towards Halton Hills or other unspecified areas of the GTA.

How this issue of residual Peel growth demand is worked out will have a significant impact on Brampton over the planning period. If Caledon or other nearby municipalities were to accommodate a more significant share of growth, it could relieve some of the forthcoming growth pressure on Brampton.

7. DISCUSSION OF FINANCIAL AND OTHER CHALLENGES IN RESPONDING TO HIGH GROWTH RATES

For discussion purposes, the challenges faced by the City in responding to high growth rates can be sorted into two categories, financial challenges and co-ordination of infrastructure and services.

7.1. Financial Challenges

A significant portion of the infrastructure required to support growth is funded by the development charges revenue collected by the City in accordance with the provisions of the Development Charges Act. However, the Act limits what infrastructure the City can collect for and how the service levels can be calculated. In addition, certain infrastructure that is allowed under the Act is subject to a collection limit of only 90% of the City's need. The end result is that a significant portion of the capital infrastructure costs required to provide for growth must be covered by a source other than Development Charges revenue, primarily property tax revenue.

The exact level of property taxes required to fund growth can be difficult to quantify, however, in the 2004 budget year, the City's Finance staff identified the following:

- In 2004, $12.3 million in growth related impacts vs. only $8.7 million in assessment growth;
- $4.6 million in tax based funding included in 2004 budget for growth related projects (equivalent to a 3.4% tax increase);
- $239 million over the next 10 years needed to provide services previously eligible for development charge funding (under the pre-1996 Act);
- the City does not collect enough in development charges to fund necessary growth infrastructure for facilities such as public works yards and transit storage, reflecting differences in cost estimates and service levels;
- There are additional non-funded capital programs related to growth such as woodlot acquisition, rapid transit, stormwater management retrofit, and pathways expansion.

The pace of growth has an impact on the amount of property taxes collected annually required to support growth. At a slower pace of growth, infrastructure needs would be spread out over a longer timeframe. As a result, a smaller % of the annual property tax revenue would be needed to fund growth. At a faster pace of growth, the opposite is true.

7.2. Co-ordination of Infrastructure and Services

In addition to the financial challenges, a significant challenge faced by the City is ensuring that services and infrastructure such as schools, parks, roads, transit, emergency services, sewer and water, indoor and outdoor recreation facilities etc. are provided at the right time and right place so that service level targets are met for both new and existing residents. This requires significant efforts in the planning, financing, detailed design, property acquisition, regulatory approvals and construction phases for all elements of the City's infrastructure and services.

The City's current Growth Management Program (GMP) approved in April 2003 was targeted at co-coordinating growth with the infrastructure required to serve that growth with the objective of meeting service level targets for both existing and new residents. Over the last year the City has implemented the GMP and significant progress has been made including the following achievements:

- Early provision of School Sites in initial phases of subdivisions (i.e. Vales of Castlemore, Bram East, Bram West)
- Early provision of collector road networks in initial phases of subdivisions (i.e. New Creditview Road and Financial Drive in Bram West)
- Landowner commitments to infrastructure co-ordination through Staging and Sequencing Plans in new secondary plans
- Establishing a Growth Management Development Review Team with biweekly meetings of staff from City Departments, School Boards, Region of Peel and Conservation Authorities

The results of this success will only be seen on the ground in the next few years as the developments approved since adopting the GMP are actually built.

Because the City is planning on the basis of 4500 units per year when it is evident that the City will grow at a rate of 5500+ units per year, the GMP is not enough. Despite the successes to date with the GMP, certain areas have been identified where improvements can be made or are necessary to address the ongoing challenges faced by the City and the emerging growth management initiatives of the Province. Four key areas for improvement are discussed below:

City Wide Co-ordination: The data and analysis for the GMP has generally been undertaken at the Secondary Plan level and implementation has generally been carried out through comments and conditions provided on individual development applications. This approach has led to some success and will continue to provide improved performance towards meeting our growth management objectives as the developments being planned today move to construction. However, the current Program approach does not provide a mechanism for prioritizing growth areas and efforts across the City. Such a mechanism to prioritize growth areas will be increasingly necessary with the higher growth rates now being forecast for Brampton's future, the challenges the City faces in responding to growth, and various provincial initiatives which increasingly require that infrastructure investments and resource allocation decisions strategically support growth priorities.

In Part B Section 2 of this Report, there is a discussion and recommendations about the forecast distribution. The approach recommended is intended to provide an opportunity for the City to establish criteria and set goals for how the City will prioritize its allocation of resources to support growth.

Timing of Road Improvements: Currently the growth management requirements generally reflect road improvements being in place in the year that is recorded in either the City or Region's capital budgets. However, most major projects are not in service until at least 2 years after the money is available through the capital budgets because of the time it takes for detailed design, property acquisition, utility relocation etc. This time difference combined with the pace of growth in Brampton has resulted in service levels not meeting the City's objectives.

It is recommended that the Growth Management Program implementation details be enhanced to track not just the capital budget allocation for road projects but also the anticipated construction timing before the facility becomes operational.

Emergency Services: The 2003 Development Outlook Report guidelines dealt with Brampton Fire Department infrastructure needed to address response issues in growth areas and indicated that ambulance service issues would be evaluated in the future. City staff have now met with the Region of Peel Ambulance Services staff who advise that, in Brampton, current legislated response times (8 minutes) are not being met and in fact response times are increasing. The issues surrounding this diminishing level of service include the need for additional staff and vehicle resources to serve a rapidly growing population. In addition, there is a direct relationship between response times and the overall capacity of the health care system in Brampton. Delays at transferring patients to care at a Brampton Memorial Hospital, or the need to take patients to distant emergency facilities because capacity is not available locally, have a direct impact on the amount of ambulance staff and vehicle resources needed to maintain response times. The situation is expected to improve, should additional emergency care infrastructure be built in Brampton.

School Infrastructure: There has been some success with accommodating school sites earlier in the development process but both School Boards are finding difficulties negotiating the acquisition/cost of land especially when unmotivated vendors show little intention to develop in the near future. In addition now schools are being considered at an early phase of community development. Coordination of local infrastructure such as local road improvements, cross walks and sidewalk construction are increasingly at issue. City staff are developing protocols with school board staff to address these issues.

Recreation Infrastructure: With the Recreation Master Plan underway, coordination with the Growth Management Plan will be imperative to ensuring that the necessary recreational and park facilities will be available to meet City growth. As a City we need to do a better job of identifying and monitoring service areas for Community Park, City Wide Park and Recreation Centre facilities.

PART B: DEVELOPMENT OUTLOOK SCENARIOS 2004

1. CITY OF BRAMPTON GROWTH FORECAST SCENARIOS

1.1. Residential

In this current environment of a continued housing boom, a shifting policy regime and uncertainty about land supply in neighbouring communities, the City of Brampton needs to consider a forecast range of future growth.

The current uncertainties almost entirely reflect the timing of development. There is little doubt that designated urban lands in Brampton can be fully developed within 20 or 30 years. The important matter for Brampton's current growth management and municipal service planning is when development will occur and when infrastructure is required.

As a result, a forecast range has been prepared which addresses a range on the timing of development under three scenarios. All three scenarios are based on the same forecast outlook for the GTA—Hamilton area and vary by the distribution of growth within the GTA—Hamilton area, thus varying the timing of development in Brampton. The three scenarios are the following:

High Growth Scenario

The high forecast scenario is the results of the asking the question "what if" there were delays in providing adequate development land in Brampton's neighbouring areas resulting in pressures for Brampton to accommodate a larger share of GTA—Hamilton growth than might otherwise be expected.

This scenario is based on the current pace of development of over 6,000 units continuing through to 2016, before slowing, as Brampton's own land supply constraints begin to affect development. Under this scenario, Brampton's housing supply would be effectively built out to the existing urban boundary by about 2016.

Table 8: Brampton High Growth Forecast

High Growth Scenario

	2001	2006	2011	2016	2021	2031
Dwelling Units	97,560	129,391	162,753	195,460	214,992	227,882
Household Size	3.32	3.28	3.21	3.12	3.07	2.98
Pop	325,000	426,000	524,000	613,000	662,000	682,000

Medium Growth Scenario

The medium growth scenario is based on continued rapid development in Brampton through 2005 and into 2006, followed by a slowing from the current rate of about 6,300 units per year (2001 to 2006 average) to about 5,500 units per year for the period to 2016. Under this scenario the City could expect to reach build out of the current urban boundary greenfields supply of residential land by about 2018.

The forecast scenario assumes that other neighbouring regions continue to provide land and servicing to accommodate the levels of growth anticipated in those areas. Such assumptions would include, for example, that the North Oakville area comes on stream when planned and that York Region resolves current servicing constraints and assures an adequate supply of lands in the Region.

Table 7: Brampton Medium Growth Forecast

Reference (Medium) Growth Scenario

	2001	2006	2011	2016	2021	2031
Dwelling Units	97,560	129,182	156,706	184,091	206,119	227,457
Household Size	3.32	3.28	3.20	3.11	3.06	2.98
Pop	325,000	426,000	504,000	575,000	633,000	681,000

Low Growth Scenario

The Low Scenario is based on a slowing of the current pace of development over the next couple of years resulting an average of just under 6,000 units for the 2001 to 2006 period, and then falling to about 4,500 units annually through 2021. Under this scenario, Brampton's total housing supply would be 90% built out by about 2023 including the North-West Brampton urban expansion area. The City could expect to reach build out of the current urban boundary greenfields supply of residential land by about 2021.

This forecast scenario tests a generally lower scenario of growth in Brampton based on housing growth about 20% less than the Reference Scenarios. This lower level of growth could arise from a wide range of seasons including: policy decisions in the City of Brampton, market shifts directing more growth to other parts of the GTA—Hamilton or just generally slower population or economic growth in the GTA-Hamilton area. Although provided for reference purposes, City staff and our consultants (Hemson Consulting) do not see that the conditions necessary to see this forecast realized are very likely given the current circumstances in terms of national economic conditions, interest rates, the GTA housing market and land supply.

It should be noted that the low growth scenario is fairly consistent with the Brampton forecast included in Region of Peel Official Plan last year, published in the 2003 GMP and utilized for the City's recently approved Development Charges By-law.

Table 9: Brampton Low Growth Forecast

Low Growth Scenario

	2001	2006	2011	2016	2021	2031
Dwelling Units	97,560	126,655	149,032	172,139	192,748	222,021
Household Size	3.32	3.28	3.19	3.10	3.04	2.97
Pop	325,000	417,000	478,000	536,000	589,000	662,000

1.2. Employment

The employment forecasts under each of the scenarios reflect a similar range as the Reference, Low and High Scenarios; the What If? Scenario showing more rapid growth than the Reference Scenario and reaching a slightly higher level at the end of the forecast period; and the Low Scenario showing slower rate of growth and resulting in about 20% less employment growth over the 2001 to 2031 period than in the Reference Scenario.

Table 10: Brampton Employment Growth Forecast

Year	2001	2006	2011	2016	2021	2031
Low	133,600	174,600	213,100	241,900	259,900	277,400
Change		*41,000*	*38,500*	*28,800*	*18,000*	*17,500*
Medium	133,600	176,100	227,600	263,300	289,000	322,800
Change		*42,500*	*51,500*	*35,700*	*25,700*	*33,800*
High	133,600	176,200	231,700	270,500	295,500	326,600
Change		*42,600*	*55,500*	*38,800*	*25,000*	*31,100*

2. STRATEGIC OPTIONS FOR ADDRESSING HIGH GROWTH

Although the City has planned for growth in the range of 4500 units per year, the number of building permits issued for new residential units in 2004 was 9574, in part due to the number of developers looking to get building permits applications approved prior to the new Development Charges increase. Continued high growth can be considered very likely given the emerging policy framework which will tend to encourage intensification, and discourage urban area expansions, the shortage of urban designated land in the GTA-Hamilton Area and a continued significant demand for low density forms of housing.

Therefore, the City needs to consider revised forecasts as they relate to the current housing market and shifting provincial initiatives such as those presented by the reference and high growth forecasts. In addition, the City needs to consider possible measures to deal with the potential high levels of growth and the ability for the City to accommodate that growth through the current financial model and resources available to deliver required infrastructure.

As discussed in Section 7 above, the current GMP provides a tool for assisting in the coordination of infrastructure with growth, not as a mechanism for prohibiting development. The GMP is typically applied on an application-by-application basis and on an analysis generally undertaken at an individual Secondary Plan level; as such it does not provide a mechanism for prioritizing growth areas across the City.

A mechanism to prioritize growth areas will be increasingly necessary with the higher growth rates now being forecast for Brampton's future given the challenges the City faces in responding to growth, and various provincial initiatives which increasingly require that infrastructure investments and resource allocation decisions strategically support growth priorities.

The City will continue to apply the GMP on a site-specific or secondary plan basis, flagging shortfalls in infrastructure and coordinating the staging and phasing of development with level of service to meet growth. However, the City should consider additional measures to ensure that resources needed to support growth are focused on areas that best meet the core public objectives such as providing a range of housing opportunities, providing employment opportunities, and minimizing growth in travel demand.

Some criteria aimed at prioritizing areas growth that best achieve public objectives could include focusing on:

- Areas that can be easily serviced by extensions to existing infrastructure and do not require leap-frogging of undeveloped or underdeveloped areas;
- Areas that can provide a mix of housing opportunities and forms;
- Areas that can be developed at higher, transit supportive densities thereby minimizing the growth in automobile traffic which is placing unsustainable pressures on the City's roads;
- Areas that utilize innovative transit oriented community design principles including mixed use corridors;
- Areas with sufficient high quality community open space and recreation facilities planned, programmed and funded such that undue stresses are not placed on existing recreation and open space infrastructure;
- Areas that enhance the City's objective to promote live/work within the City by providing significant employment growth.

Some options, which may be considered in order to achieve objectives for prioritizing growth areas in the face of high growth, rates as well as respond to the financial challenges and challenges of keeping pace with infrastructure construction are provided in Table 12.

All these options represent potential opportunities and solutions as well as challenges. One of the purposes of this Discussion Paper is to stimulate discussion and feedback on these and other options for the City and others to respond to the high growth rates which appear to be in the City's future.

Table 12: Potential Strategic Options For Responding to High Growth*

Option	Description	Comment
Status Quo	• Continue to utilize GMP • Continue to pursue all Sec Plan and Block Plan proposals with equal priority • Continue to pursue N-W Brampton urban boundary expansion	• Without identifying priority areas for growth or placing policy restrictions on market forces, the City will not be able to maintain appropriate service levels for existing and new residents without significant capital & operating budget & property tax implications.
Delay Further Residential Designations	• Further commitments to advance residentially designated land would be carefully evaluated and given relative priority levels by Council • Those with lower priority would be delayed (i.e. new secondary plan areas such as Vales of Humber, employment land conversions)	• Some positive affects in that resources could be focused just on areas with current Residential Designations • It is unlikely to have a significant impact on the overall growth rate or resolve difficulty in meeting service levels • Some landowner's in areas given lower priority will object to having further Sec Plan designations delayed
Priority Focused Development	• Council would adopt specific criteria for prioritizing growth areas (i.e. specific criteria and specific Sec Plans would be identified) • Areas given high priority would be targeted for growth, areas given lower priority would have development delayed	• Would allow even more focus on priority areas and may have an impact on the pace of growth by slowing pace of lower priority areas already given Sec Plan residential designations • Some landowner's in areas already designated and yet given lower priority will object and landowner's in areas given lower priority will object to having further Sec Plan designations delayed
Draft Plan Approval Cap	• An annual CAP placed on the max units draft approved in the calendar year (i.e. approximately 5500 units per year)	• Difficult to establish the relative priority of individual development proposals and would require additional staff resources to effectively implement • Strictly a first come, first served approach would leave shortfalls in key infrastructure in some communities such as road extensions, schools and parks • Some landowner's not included in annual CAP will object
Tool-Up for High Growth	• Provide sufficient staff resources for development review, capital and operating functions to support High Growth Forecasts • Seek additional financial tools from the Province and others to support High Growth Forecasts	• Still means High Growth in Brampton • Even if Province endorses additional funding sources or mechanisms, there will be delay until they are actually in place • Increased staff capacity in development review will facilitate high rates of growth

*Note - one, some or all of the above could be used together

3. FORECAST DISTRIBUTION

3.1 Intensification

Planning in the GTA—Hamilton area has been increasingly focused on providing for a larger component of growth through intensification of existing built-up areas. This has occurred for many reasons, among them to: provide more efficient use of existing infrastructure; reduce the need to designate additional greenfield urban lands and increase the population density within existing urban areas to encourage transit. For example, the recent Provincial *Place to Grow* report suggests a target of 40% of growth through intensification, though how this is to be defined, measured, monitored or implemented has not been indicated as yet.

Intensification itself is a normal process in the evolution of an urban area. During early stages of development, growth is typically primarily accommodated on greenfield locations. As communities age, an increasing share of growth is accommodated through infill, redevelopment and vacant sites within the existing developed area. Virtually all of the housing growth in the City of Toronto over the past 25 years has been through intensification. In Brampton, it has historically been a small share, but it will increase over time.

Policies to encourage intensification can assist in achieving intensification goals, however local planning policy cannot on its own assure high levels of intensification. By it's nature, most units provided through intensification are medium and high density (rowhousing, stacked rowhousing and apartments). However, these types of units only represent a portion of the market --- many households still prefer single and semi-detached housing, more difficult to provide through intensification. The housing preferences of households (singles vs. apartments, etc.) are the results a wide range of social, demographic, economic and cultural phenomena. Few of the policies, which might influence these choices, are within the jurisdiction of municipalities. Any policies that have the affect of restricting land supply in favour of intensification has the unintended consequence of limiting the amount of affordable housing.

A significant amount of growth through intensification is forecast for Brampton over the planning period to 2031. The forecast suggests additional growth of about 400 low-density units and about 5,000 medium and high-density units over the period to 2031 within already built up areas of the City, beyond the identified inventory of available vacant sites in Brampton. It is expected that these units will be provided through the redevelopment and intensification of existing developed lands. In addition, there are a number of designated medium and high density sites throughout the serviced portion of the City which are expected to be developed as the market for higher density housing forms grows.

3.2 Forecast Distribution – Alternative Scenarios

The three City wide growth scenarios noted above translate into various growth scenarios at the Secondary Planning Area level. The rate of growth for the City has an effect on when certain services and infrastructure will be required. Growth within the City of Brampton has generally been distributed among several active Secondary Planning Areas. As indicated in Table 10, although the Fletcher's Meadow Secondary Planning Area (5 yr average of over 2300 units/year) has seen the most growth over the past 4 years; growth across the City has been distributed across several Secondary Planning areas including Springdale, Bram East, Vales of Castlemore, and recently Bram West.

Table 10: 2000-2004 High Growth Secondary Plans in Brampton (units per year)

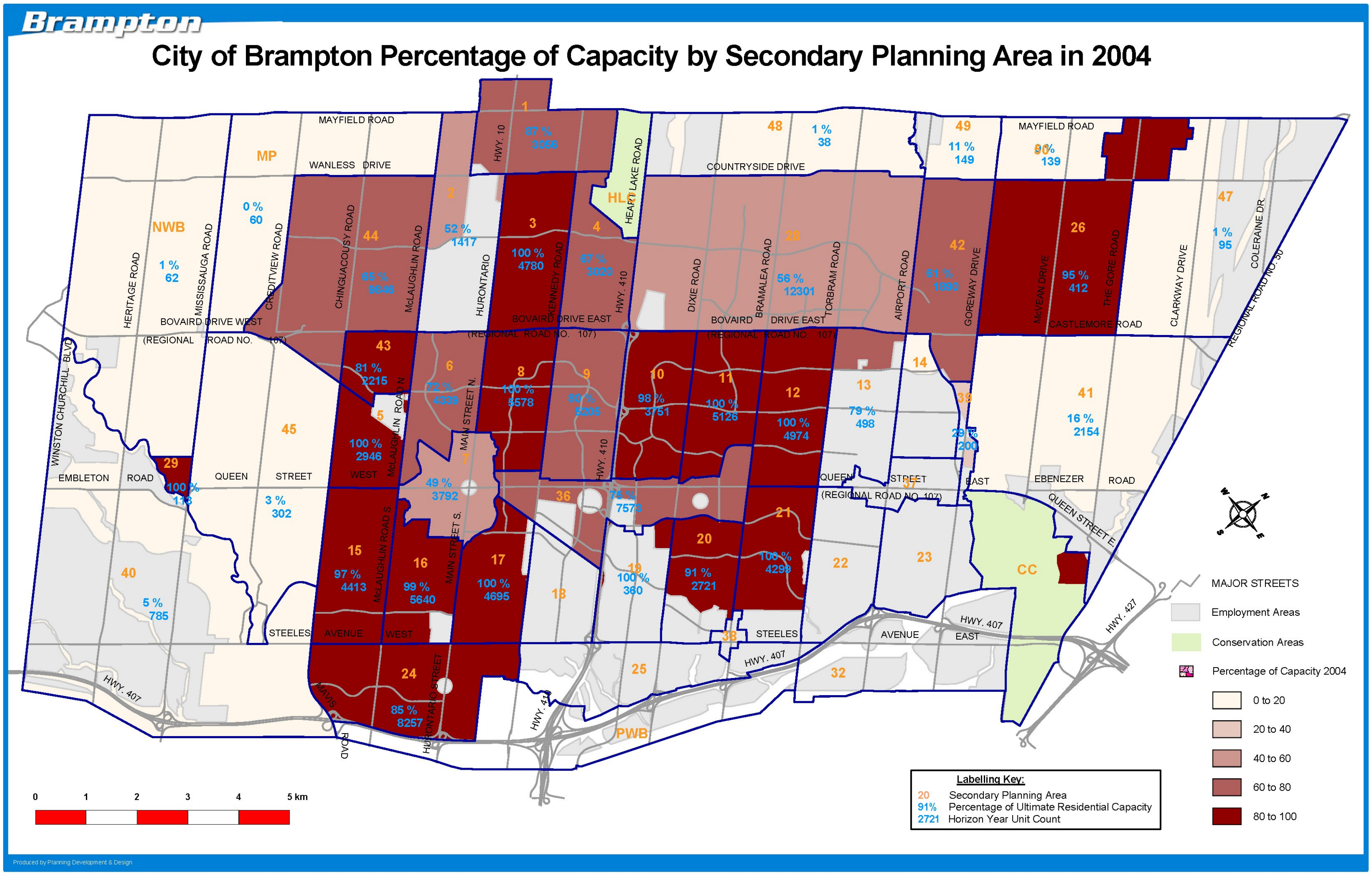
SPA	2000	2001	2002	2003	2004
2-NW Sandalwood Parkway	647	616	238	55	139
1-Snelgrove	195	84	32	180	160
43-Fletchers Creek	410	418	531	176	175
24-Flether's South	1	99	236	22	242
42-Vales of Castlemore	698	436	425	210	625
49-Vales North	-	-	-	139	910
40-Bram West	-	-	119	329	1,003
28-Springdale	1,154	320	841	1,490	1,170
9-Madoc	-	-	-	-	1,343
41-Bram East	-	539	837	602	1,558
44-Fletcher's Meadow	1,703	2,246	3,074	2,771	2,100
Total	**4,808**	**4,758**	**6,333**	**5,974**	**9,425**
Other	510	200	129	696	149
City Total	**5,318**	**4,958**	**6,462**	**6,670**	**9,574**

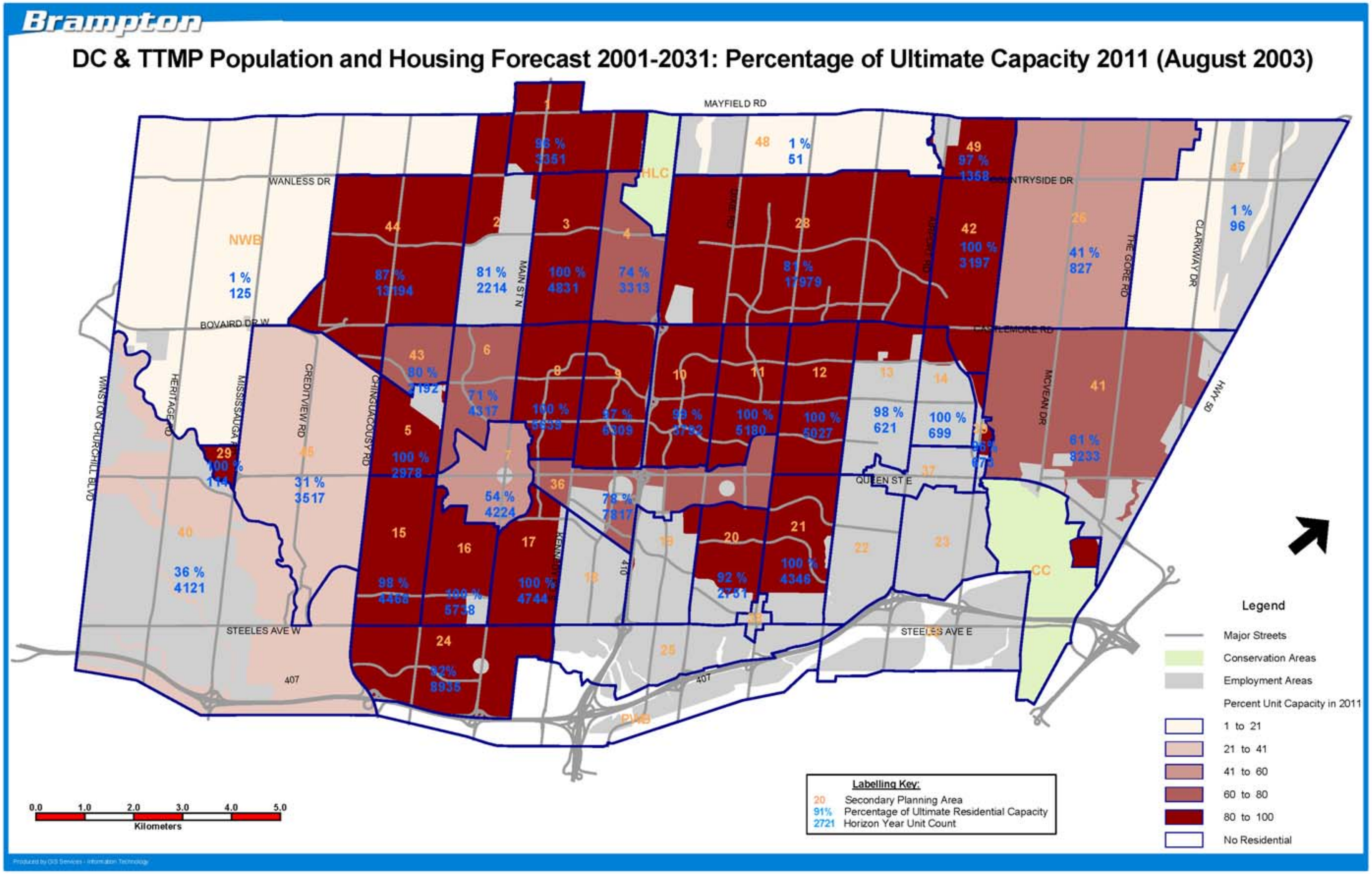
Based on the High, Medium and Low City wide forecasts developed by Hemson Consulting, City staff have developed several alternative scenarios distributing those forecasts by the approximately 50 secondary plans across the City. These forecast distributions are generally based on the current development proposals, anticipated timing of land use approvals and the anticipated timing of relevant municipal services.

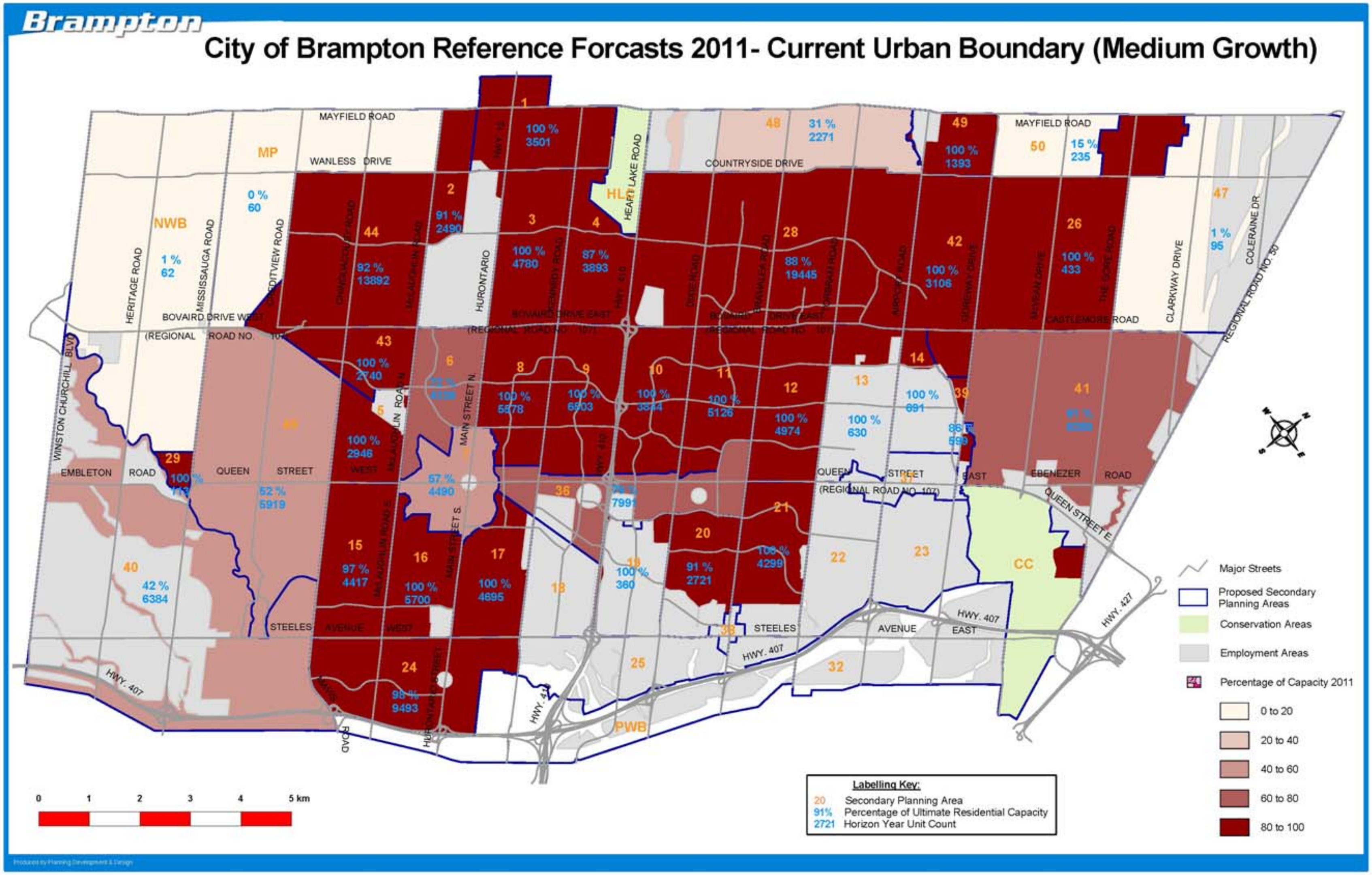
In addition to the High, Medium and Low growth forecast distributions by Secondary Planning Area, a distribution of the High Growth forecast considering early development of North West Brampton has been prepared for analysis purposes.

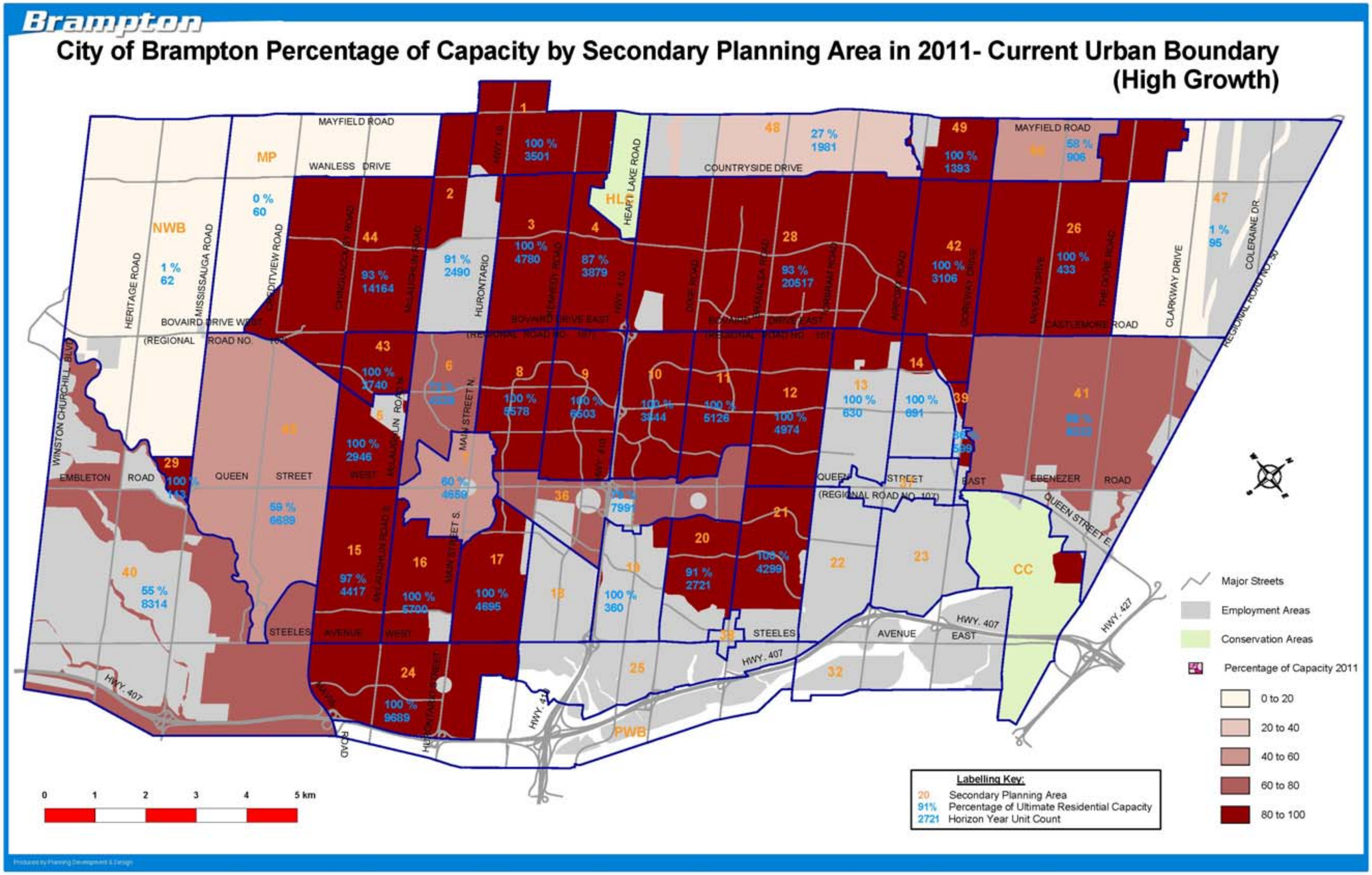
Detailed tables of the various forecasts by Secondary Planning Areas are available in the 2004 Development Outlook Report. To help demonstrate the variation between these forecasts, the following maps have been prepared showing the percentage of the ultimate development within each secondary plan for the current year (2004) and the year 2011 for each scenario.

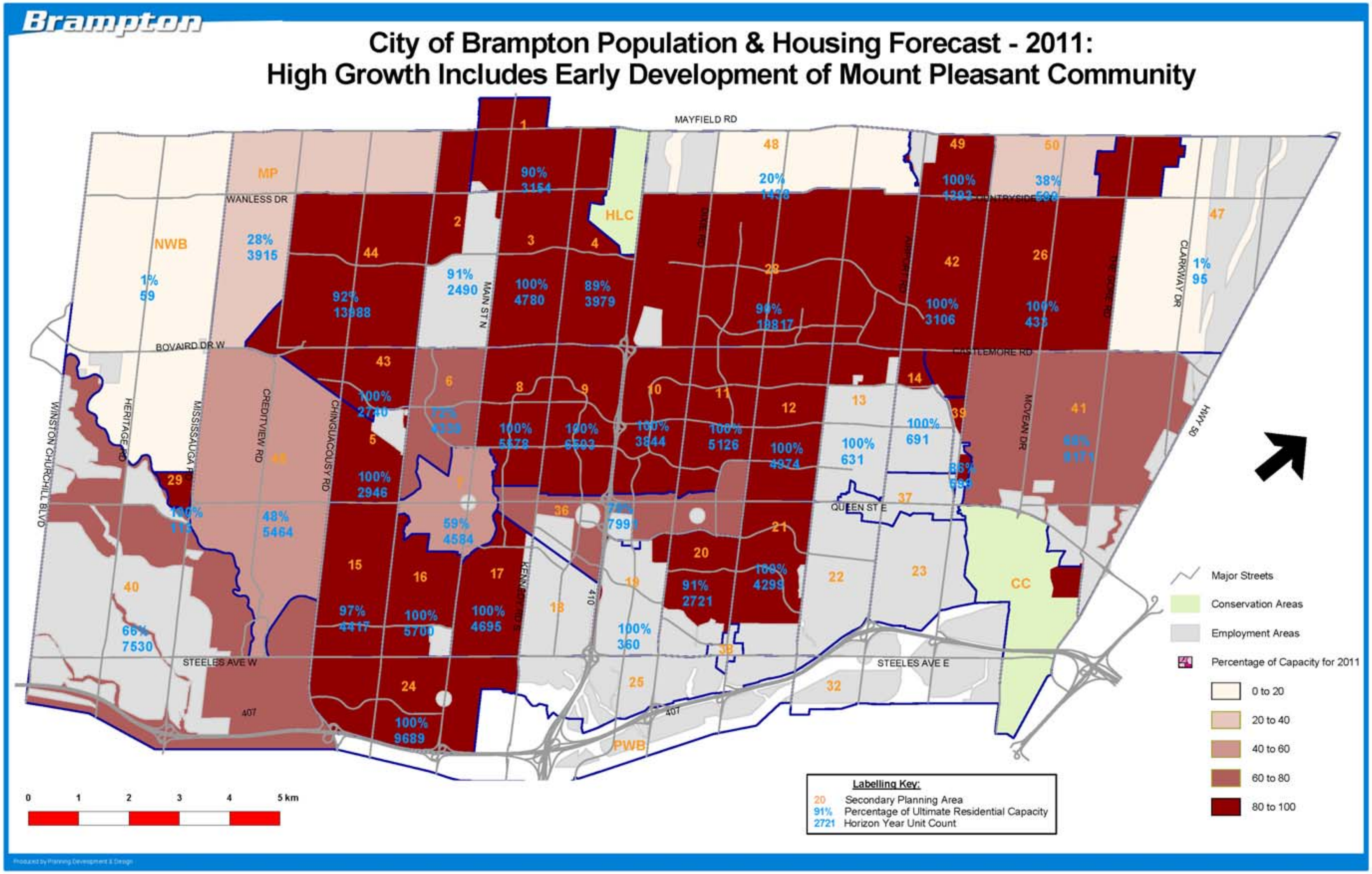
Map 1 Representative Mapping of Development in the Year 2004




Brampton
DC & TTMP Population and Housing Forecast 2001-2031: Percentage of Ultimate Capacity 2011 (August 2003)
MAYFIELD RD
WANLESS DR
BOVAIRD DR W
STEELES AVE W
STEELES AVE E
QUEEN ST E
COUNTRYSIDE DR
CASTLEMORE RD
MAIN ST N
CREDITVIEW RD
MISSISSAUGA RD
HERITAGE RD
WINSTON CHURCHILL BLVD
CHINGUACOUSY RD
MCVEAN DR
THE GORE RD
CLARKWAY DR
HWY 50
410
407
NWB
HLC
CC
PWB
1 %
125
87 %
13194
81 %
2214
100 %
4831
74 %
3313
81 %
17979
42
100 %
3197
49
97 %
1358
48
1 %
51
41 %
827
1 %
96
43
6
71 %
4317
100 %
2978
54 %
4224
31 %
3517
36 %
4121
29
98 %
621
100 %
699
61 %
8233
41
12
100 %
5027
100 %
5180
78 %
7817
15
16
17
24
20
21
92 %
2751
100 %
4346
98 %
4468
100 %
4744
82%
8935
0.0
1.0
2.0
3.0
4.0
5.0
Kilometers
Labelling Key:
20 Secondary Planning Area
91% Percentage of Ultimate Residential Capacity
2721 Horizon Year Unit Count
Legend
Major Streets
Conservation Areas
Employment Areas
Percent Unit Capacity in 2011
1 to 21
21 to 41
41 to 60
60 to 80
80 to 100
No Residential


Brampton
City of Brampton Reference Forcasts 2011- Current Urban Boundary (Medium Growth)
Major Streets
Proposed Secondary Planning Areas
Conservation Areas
Employment Areas
Percentage of Capacity 2011
0 to 20
20 to 40
40 to 60
60 to 80
80 to 100
Labelling Key:
20 Secondary Planning Area
91% Percentage of Ultimate Residential Capacity
2721 Horizon Year Unit Count
0 1 2 3 4 5 km


Brampton
City of Brampton Percentage of Capacity by Secondary Planning Area in 2011- Current Urban Boundary (High Growth)
Major Streets
Employment Areas
Conservation Areas
Percentage of Capacity 2011
0 to 20
20 to 40
40 to 60
60 to 80
80 to 100
Labelling Key:
20 Secondary Planning Area
91% Percentage of Ultimate Residential Capacity
2721 Horizon Year Unit Count
0 1 2 3 4 5 km


Brampton
City of Brampton Population & Housing Forecast - 2011:
High Growth Includes Early Development of Mount Pleasant Community
MAYFIELD RD
WANLESS DR
BOVAIRD DR W
CASTLEMORE RD
QUEEN ST E
STEELES AVE W
STEELES AVE E
WINSTON CHURCHILL BLVD
HERITAGE RD
MISSISSAUGA RD
CREDITVIEW RD
CHINGUACOUSY RD
MAIN ST N
MCVEAN DR
CLARKWAY DR
HWY 50
410
407
MP
NWB
HLC
CC
PWB
28%
3915
1%
59
92%
13988
91%
2490
90%
100%
4780
89%
3979
20%
96%
18817
100%
3106
38%
1%
95
48%
5464
100%
2946
59%
4584
100%
5126
100%
4974
100%
631
100%
691
91%
2721
100%
4299
97%
100%
4695
100%
360
100%
9689
66%
7530
Major Streets
Conservation Areas
Employment Areas
Percentage of Capacity for 2011
0 to 20
20 to 40
40 to 60
60 to 80
80 to 100
Labelling Key:
20 Secondary Planning Area
91% Percentage of Ultimate Residential Capacity
2721 Horizon Year Unit Count
0
1
2
3
4
5 km

4. RECOMMENDED NEXT STEPS

4.1 Policy Initiatives

- Consider 'Political Level' contact with the Province to highlight Brampton's disproportionate accommodation of GTA planned growth

- Accelerate the ongoing OP Review and develop a, strategic response to high growth forecasts, and associated modifications to the GMP.

- Continue to provide Brampton Response and comments to the ongoing Provincial growth management initiatives.

4.2 Reference Forecasts for Current Planning Initiatives

- Publish a 2004 edition of the GMP Development Outlook Report based on the medium growth forecast for use until the above policy initiatives and ongoing Provincial initiatives are further advanced

APPENDIX 1:

BRAMPTON POPULATION & HOUSING FORECASTS, HEMSON CONSULTING, OCTOBER 2004

(LOW, MEDIUM & HIGH SCENARIOS)

APPENDIX 1: Brampton Population & Housing Forecasts, Hemson Consulting, October 2004 (Low, Medium & High Scenarios)

REFERENCE SCENARIO INCLUDING NORTHWEST BRAMPTON

VII.A BRAMPTON HOUSING AND HOUSEHOLD POPULATION FORECAST

		Singles	Semis	Rows	Apts.	All Units
1986	Units	29,105	9,425	6,300	12,055	56,885
	Household	3.53	3.86	3.57	2.12	3.29
	Pop	102,740	36,395	22,485	25,605	187,225
1986-91	Additions	8,370	-150	1,310	4,260	13,790
1991	Units	37,475	9,275	7,610	16,315	70,675
	Household	3.63	3.71	3.37	2.23	3.29
	Pop	136,200	34,420	25,640	36,390	232,650
1991-96	Additions	4,025	538	1,537	4,402	10,502
1996	Units	41,500	9,813	9,147	20,717	81,177
	Household	3.61	3.57	3.38	2.48	3.29
	Pop	149,678	35,031	30,961	51,301	266,971
1996-01	Additions	10,630	3,642	2,638	-527	16,383
2001	Units	52,130	13,455	11,785	20,190	97,560
	Household	3.64	3.52	3.25	2.42	3.32
	Pop	189,654	47,364	38,349	48,809	324,176
2001-06	Additions	21,518	6,644	2,735	724	31,622
2006	Units	73,648	20,099	14,520	20,914	129,182
	Household	3.53	3.43	3.17	2.35	3.28
	Pop	260,037	68,840	45,967	49,200	424,043
2006-11	Additions	14,414	6,941	3,855	2,313	27,524
2011	Units	88,063	27,040	18,375	23,227	156,706
	Household	3.43	3.33	3.08	2.29	3.20
	Pop	302,327	90,023	56,590	53,180	502,120
2011-16	Additions	13,401	5,359	4,986	3,640	27,385
2016	Units	101,464	32,399	23,361	26,867	184,091
	Household	3.34	3.24	2.99	2.23	3.11
	Pop	338,613	104,844	69,910	59,841	573,208
2016-21	Additions	10,551	3,600	3,971	3,906	22,028
2021	Units	112,015	35,999	27,332	30,773	206,119
	Household	3.28	3.19	2.95	2.19	3.06
	Pop	367,960	114,691	80,510	67,513	630,674
2021-26	Additions	6,083	2,685	3,020	3,736	15,525
2026	Units	118,099	38,684	30,352	34,509	221,644
	Household	3.25	3.15	2.91	2.17	3.02
	Pop	383,485	121,855	88,361	74,876	668,576
2026-31	Additions	1,108	605	766	3,334	5,813
2031	Units	119,206	39,289	31,118	37,843	227,457
	Household	3.22	3.13	2.89	2.15	2.98
	Pop	384,051	122,782	89,883	81,459	678,175
2031-36	Additions	226	91	387	2,960	3,664
2036	Units	119,432	39,380	31,506	40,803	231,121
	Household	3.20	3.10	2.87	2.14	2.95
	Pop	382,289	122,258	90,412	87,246	682,206
2036-41	Additions	196	84	306	2,728	3,315
2041	Units	119,628	39,464	31,812	43,531	234,435
	Household	3.18	3.09	2.86	2.13	2.93
	Pop	380,967	121,886	90,827	92,592	686,272

VII.B BRAMPTON FORECAST POPULATION

	Private Household Pop.	Non-Household Population	Total Population
1986	187,225	1,273	188,498
1991	232,650	1,795	234,445
1996	266,971	1,280	268,251
2001	324,176	1,252	325,428
2006	424,043	1,638	425,680
2011	502,120	1,939	504,059
2016	573,208	2,214	575,422
2021	630,674	2,436	633,110
2026	668,576	2,582	671,158
2031	678,175	2,619	680,794
2036	682,206	2,635	684,841
2041	686,272	2,650	688,923

VII.C AVERAGE HOUSEHOLD SIZE - BRAMPTON

	Singles	Semis	Rows	Apts.	All Units
1986	3.53	3.86	3.57	2.12	3.29
1991	3.63	3.71	3.37	2.23	3.29
1996	3.61	3.57	3.38	2.48	3.29
2001	3.64	3.52	3.25	2.42	3.32
2006	3.53	3.43	3.17	2.35	3.28
2011	3.43	3.33	3.08	2.29	3.20
2016	3.34	3.24	2.99	2.23	3.11
2021	3.28	3.19	2.95	2.19	3.06
2026	3.25	3.15	2.91	2.17	3.02
2031	3.22	3.13	2.89	2.15	2.98
2036	3.20	3.10	2.87	2.14	2.95
2041	3.18	3.09	2.86	2.13	2.93

VII.D BRAMPTON FORECAST HOUSING GROWTH

	Singles	Semis	Rows	Apts.	All Units
1986-91	8,370	-150	1,310	4,260	13,790
1991-96	4,025	538	1,537	4,402	10,502
1996-01	10,630	3,642	2,638	-527	16,383
2001-06	21,518	6,644	2,735	724	31,622
2006-11	14,414	6,941	3,855	2,313	27,524
2011-16	13,401	5,359	4,986	3,640	27,385
2016-21	10,551	3,600	3,971	3,906	22,028
2021-26	6,083	2,685	3,020	3,736	15,525
2026-31	1,108	605	766	3,334	5,813
2031-36	226	91	387	2,960	3,664
2036-41	196	84	306	2,728	3,315

VII.D BRAMPTON FORECAST TOTAL HOUSING

	Singles	Semis	Rows	Apts.	All Units
1996	41,500	9,813	9,147	20,717	81,177
2001	52,130	13,455	11,785	20,190	97,560
2006	73,648	20,099	14,520	20,914	129,182
2011	88,063	27,040	18,375	23,227	156,706
2016	101,464	32,399	23,361	26,867	184,091
2021	112,015	35,999	27,332	30,773	206,119
2026	118,099	38,684	30,352	34,509	221,644
2031	119,206	39,289	31,118	37,843	227,457
2036	119,432	39,380	31,506	40,803	231,121
2041	119,628	39,464	31,812	43,531	234,435

VII.F BRAMPTON SHARE OF PEEL HOUSING MARKET

	Singles	Semis	Rows	Apts.	Total
1986-91	31.3%	50.8%	31.1%	32.4%	31.5%
1991-96	26.2%	31.4%	27.8%	30.8%	28.5%
1996-01	43.4%	33.4%	31.3%	33.9%	38.8%
2001-06	67.0%	50.8%	33.3%	12.4%	53.3%
2006-11	72.0%	87.0%	53.0%	28.0%	63.2%
2011-16	75.0%	93.0%	69.0%	38.0%	67.7%
2016-21	73.0%	85.0%	65.0%	43.0%	65.0%
2021-26	46.0%	74.0%	53.0%	45.0%	50.3%
2026-31	9.0%	20.0%	15.0%	45.0%	20.9%
2031-36	2.0%	3.5%	8.5%	45.0%	14.6%
2036-41	2.0%	4.0%	8.0%	45.0%	15.2%

VII.F BRAMPTON SHARE OF GTA HOUSING MARKET

	Singles	Semis	Rows	Apts.	Total
1986-91	7.6%	-4.4%	11.1%	6.0%	7.0%
1991-96	8.0%	60.4%	7.7%	5.7%	7.1%
1996-01	10.5%	15.9%	8.5%	-5.8%	9.9%
2001-06	19.3%	26.4%	7.4%	1.2%	13.6%
2006-11	14.4%	29.1%	11.1%	3.1%	11.8%
2011-16	13.5%	23.7%	14.5%	4.6%	11.6%
2016-21	11.7%	17.9%	13.0%	6.0%	10.7%
2021-26	6.9%	14.8%	10.6%	6.3%	8.0%
2026-31	1.4%	4.0%	3.0%	6.3%	3.3%
2031-36	0.3%	0.7%	1.7%	6.3%	2.3%
2036-41	0.3%	0.8%	1.6%	6.3%	2.4%

Average Annual					
2001-06	**4,304**	**1,329**	**547**	**145**	**6,324**
2001-21	**2,994**	**1,127**	**777**	**529**	**5,428**

APPENDIX 1: Brampton Population & Housing Forecasts, Hemson Consulting, October 2004 (Low, Medium & High Scenarios)

WHAT IF? (HIGH) SCENARIO INCLUDING NORTHWEST BRAMPTON

VII.A BRAMPTON HOUSING AND HOUSEHOLD POPULATION FORECAST

		Singles	Semis	Rows	Apts.	All Units
1986	Units	29,105	9,425	6,300	12,055	56,885
	Household	3.53	3.86	3.57	2.12	3.29
	Pop	102,740	36,395	22,485	25,605	187,225
1986-91	Additions	8,370	-150	1,310	4,260	13,790
1991	Units	37,475	9,275	7,610	16,315	70,675
	Household	3.63	3.71	3.37	2.23	3.29
	Pop	136,200	34,420	25,640	36,390	232,650
1991-96	Additions	4,025	538	1,537	4,402	10,502
1996	Units	41,500	9,813	9,147	20,717	81,177
	Household	3.61	3.57	3.38	2.48	3.29
	Pop	149,678	35,031	30,961	51,301	266,971
1996-01	Additions	10,630	3,642	2,638	-527	16,383
2001	Units	52,130	13,455	11,785	20,190	97,560
	Household	3.64	3.52	3.25	2.42	3.32
	Pop	189,654	47,364	38,349	48,809	324,176
2001-06	Additions	21,615	6,691	2,793	731	31,831
2006	Units	73,745	20,146	14,578	20,921	129,391
	Household	3.53	3.42	3.17	2.35	3.28
	Pop	260,371	68,999	46,148	49,216	424,734
2006-11	Additions	19,419	7,775	3,855	2,313	33,362
2011	Units	93,164	27,921	18,434	23,235	162,753
	Household	3.43	3.33	3.08	2.29	3.21
	Pop	319,519	92,912	56,750	53,181	522,361
2011-16	Additions	17,372	7,054	4,642	3,640	32,707
2016	Units	110,536	34,974	23,075	26,874	195,460
	Household	3.33	3.23	2.99	2.23	3.12
	Pop	368,270	113,070	69,024	59,822	610,186
2016-21	Additions	8,745	3,216	3,665	3,906	19,532
2021	Units	119,281	38,190	26,741	30,780	214,992
	Household	3.28	3.18	2.94	2.19	3.07
	Pop	391,329	121,581	78,750	67,495	659,155
2021-26	Additions	661	726	3,305	3,736	8,428
2026	Units	119,942	38,916	30,046	34,516	223,420
	Household	3.25	3.15	2.91	2.17	3.02
	Pop	389,266	122,534	87,437	74,856	674,094
2026-31	Additions	246	166	715	3,334	4,462
2031	Units	120,188	39,083	30,761	37,850	227,882
	Household	3.22	3.12	2.89	2.15	2.98
	Pop	387,055	122,095	88,821	81,437	679,407
2031-36	Additions	226	143	433	2,960	3,762
2036	Units	120,414	39,225	31,194	40,810	231,644
	Household	3.20	3.10	2.87	2.14	2.95
	Pop	385,275	121,736	89,487	87,222	683,720
2036-41	Additions	196	105	383	2,728	3,412
2041	Units	120,610	39,331	31,577	43,539	235,056
	Household	3.18	3.09	2.85	2.13	2.93
	Pop	383,938	121,432	90,122	92,567	688,060

VII.B BRAMPTON FORECAST POPULATION

	Private Household Pop.	Non-Household Population	Total Population
1986	187,225	1,273	188,498
1991	232,650	1,795	234,445
1996	266,971	1,280	268,251
2001	324,176	1,252	325,428
2006	424,734	1,640	426,374
2011	522,361	2,017	524,379
2016	610,186	2,357	612,542
2021	659,155	2,546	661,701
2026	674,094	2,603	676,697
2031	679,407	2,624	682,031
2036	683,720	2,641	686,361
2041	688,060	2,657	690,717

VII.C AVERAGE HOUSEHOLD SIZE - BRAMPTON

	Singles	Semis	Rows	Apts.	All Units
1986	3.53	3.86	3.57	2.12	3.29
1991	3.63	3.71	3.37	2.23	3.29
1996	3.61	3.57	3.38	2.48	3.29
2001	3.64	3.52	3.25	2.42	3.32
2006	3.53	3.42	3.17	2.35	3.28
2011	3.43	3.33	3.08	2.29	3.21
2016	3.33	3.23	2.99	2.23	3.12
2021	3.28	3.18	2.94	2.19	3.07
2026	3.25	3.15	2.91	2.17	3.02
2031	3.22	3.12	2.89	2.15	2.98
2036	3.20	3.10	2.87	2.14	2.95
2041	3.18	3.09	2.85	2.13	2.93

VII.D BRAMPTON FORECAST HOUSING GROWTH

	Singles	Semis	Rows	Apts.	All Units
1986-91	8,370	-150	1,310	4,260	13,790
1991-96	4,025	538	1,537	4,402	10,502
1996-01	10,630	3,642	2,638	-527	16,383
2001-06	21,615	6,691	2,793	731	31,831
2006-11	19,419	7,775	3,855	2,313	33,362
2011-16	17,372	7,054	4,642	3,640	32,707
2016-21	8,745	3,216	3,665	3,906	19,532
2021-26	661	726	3,305	3,736	8,428
2026-31	246	166	715	3,334	4,462
2031-36	226	143	433	2,960	3,762
2036-41	196	105	383	2,728	3,412

VII.D BRAMPTON FORECAST TOTAL HOUSING

	Singles	Semis	Rows	Apts.	All Units
1996	41,500	9,813	9,147	20,717	81,177
2001	52,130	13,455	11,785	20,190	97,560
2006	73,745	20,146	14,578	20,921	129,391
2011	93,164	27,921	18,434	23,235	162,753
2016	110,536	34,974	23,075	26,874	195,460
2021	119,281	38,190	26,741	30,780	214,992
2026	119,942	38,916	30,046	34,516	223,420
2031	120,188	39,083	30,761	37,850	227,882
2036	120,414	39,225	31,194	40,810	231,644
2041	120,610	39,331	31,577	43,539	235,056

VII.F BRAMPTON SHARE OF PEEL HOUSING MARKET

	Singles	Semis	Rows	Apts.	Total
1986-91	31.3%	50.8%	31.1%	32.4%	31.5%
1991-96	26.2%	31.4%	27.8%	30.8%	28.5%
1996-01	43.4%	33.4%	31.3%	33.9%	38.8%
2001-06	67.0%	51.0%	33.7%	12.4%	53.4%
2006-11	77.6%	88.2%	53.0%	28.0%	67.6%
2011-16	79.5%	94.6%	67.5%	38.0%	71.5%
2016-21	60.5%	79.8%	60.0%	43.0%	58.0%
2021-26	5.0%	20.0%	58.0%	45.0%	27.3%
2026-31	2.0%	5.5%	14.0%	45.0%	16.0%
2031-36	2.0%	5.5%	9.5%	45.0%	15.0%
2036-41	2.0%	5.0%	10.0%	45.0%	15.7%

VII.F BRAMPTON SHARE OF GTA HOUSING MARKET

	Singles	Semis	Rows	Apts.	Total
1986-91	7.6%	-4.4%	11.1%	6.0%	7.0%
1991-96	8.0%	60.4%	7.7%	5.7%	7.1%
1996-01	10.5%	15.9%	8.5%	-5.8%	9.9%
2001-06	19.4%	26.6%	7.6%	1.3%	13.7%
2006-11	19.4%	32.6%	11.1%	3.1%	14.3%
2011-16	17.5%	31.2%	13.5%	4.6%	13.9%
2016-21	9.7%	16.0%	12.0%	6.0%	9.5%
2021-26	0.7%	4.0%	11.6%	6.3%	4.3%
2026-31	0.3%	1.1%	2.8%	6.3%	2.5%
2031-36	0.3%	1.1%	1.9%	6.3%	2.4%
2036-41	0.3%	1.0%	2.0%	6.3%	2.5%

Average Annual					
2001-06	**4,323**	**1,338**	**559**	**146**	**6,366**
2001-21	**3,358**	**1,237**	**748**	**530**	**5,872**

APPENDIX 1: Brampton Population & Housing Forecasts, Hemson Consulting, October 2004 (Low, Medium & High Scenarios)

LOW SCENARIO INCLUDING NORTHWEST BRAMPTON

VII.A BRAMPTON HOUSING AND HOUSEHOLD POPULATION FORECAST

		Singles	Semis	Rows	Apts.	All Units
1986	Units	29,105	9,425	6,300	12,055	56,885
	Household	3.53	3.86	3.57	2.12	3.29
	Pop	102,740	36,395	22,485	25,605	187,225
1986-91	Additions	8,370	-150	1,310	4,260	13,790
1991	Units	37,475	9,275	7,610	16,315	70,675
	Household	3.63	3.71	3.37	2.23	3.29
	Pop	136,200	34,420	25,640	36,390	232,650
1991-96	Additions	4,025	538	1,537	4,402	10,502
1996	Units	41,500	9,813	9,147	20,717	81,177
	Household	3.61	3.57	3.38	2.48	3.29
	Pop	149,678	35,031	30,961	51,301	266,971
1996-01	Additions	10,630	3,642	2,638	-527	16,383
2001	Units	52,130	13,455	11,785	20,190	97,560
	Household	3.64	3.52	3.25	2.42	3.32
	Pop	189,654	47,364	38,349	48,809	324,176
2001-06	Additions	19,643	6,362	2,414	676	29,095
2006	Units	71,773	19,817	14,199	20,866	126,655
	Household	3.53	3.42	3.16	2.35	3.28
	Pop	253,194	67,802	44,918	49,031	414,946
2006-11	Additions	11,116	5,798	3,286	2,176	22,377
2011	Units	82,890	25,615	17,485	23,042	149,032
	Household	3.43	3.32	3.08	2.29	3.19
	Pop	284,267	85,149	53,801	52,663	475,880
2011-16	Additions	10,791	4,978	4,145	3,193	23,107
2016	Units	93,681	30,593	21,630	26,235	172,139
	Household	3.33	3.23	2.99	2.22	3.10
	Pop	312,044	98,754	64,629	58,268	533,696
2016-21	Additions	9,567	3,909	4,047	3,086	20,609
2021	Units	103,247	34,502	25,677	29,321	192,748
	Household	3.27	3.17	2.93	2.18	3.04
	Pop	337,876	109,418	75,339	64,010	586,643
2021-26	Additions	8,767	2,787	3,704	2,654	17,913
2026	Units	112,015	37,290	29,382	31,975	210,661
	Household	3.23	3.13	2.89	2.15	3.00
	Pop	361,410	116,652	84,982	68,879	631,924
2026-31	Additions	6,784	1,628	752	2,196	11,360
2031	Units	118,799	38,918	30,134	34,171	222,021
	Household	3.19	3.10	2.86	2.13	2.97
	Pop	379,329	120,551	86,322	72,900	659,101
2031-36	Additions	1,532	357	611	1,774	4,274
2036	Units	120,331	39,275	30,745	35,945	226,296
	Household	3.17	3.07	2.84	2.12	2.94
	Pop	381,223	120,713	87,393	76,089	665,418
2036-41	Additions	554	177	448	1,452	2,631
2041	Units	120,885	39,451	31,193	37,398	228,927
	Household	3.15	3.06	2.83	2.10	2.92
	Pop	380,810	120,565	88,163	78,712	668,250

VII.B BRAMPTON FORECAST POPULATION

	Private Household Pop.	Non-Household Population	Total Population
1986	187,225	1,273	188,498
1991	232,650	1,795	234,445
1996	266,971	1,280	268,251
2001	324,176	1,252	325,428
2006	414,946	1,603	416,548
2011	475,880	1,838	477,718
2016	533,696	2,061	535,757
2021	586,643	2,266	588,909
2026	631,924	2,441	634,364
2031	659,101	2,546	661,646
2036	665,418	2,570	667,988
2041	668,250	2,581	670,831

VII.C AVERAGE HOUSEHOLD SIZE - BRAMPTON

	Singles	Semis	Rows	Apts.	All Units
1986	3.53	3.86	3.57	2.12	3.29
1991	3.63	3.71	3.37	2.23	3.29
1996	3.61	3.57	3.38	2.48	3.29
2001	3.64	3.52	3.25	2.42	3.32
2006	3.53	3.42	3.16	2.35	3.28
2011	3.43	3.32	3.08	2.29	3.19
2016	3.33	3.23	2.99	2.22	3.10
2021	3.27	3.17	2.93	2.18	3.04
2026	3.23	3.13	2.89	2.15	3.00
2031	3.19	3.10	2.86	2.13	2.97
2036	3.17	3.07	2.84	2.12	2.94
2041	3.15	3.06	2.83	2.10	2.92

VII.D BRAMPTON FORECAST HOUSING GROWTH

	Singles	Semis	Rows	Apts.	All Units
1986-91	8,370	-150	1,310	4,260	13,790
1991-96	4,025	538	1,537	4,402	10,502
1996-01	10,630	3,642	2,638	-527	16,383
2001-06	19,643	6,362	2,414	676	29,095
2006-11	11,116	5,798	3,286	2,176	22,377
2011-16	10,791	4,978	4,145	3,193	23,107
2016-21	9,567	3,909	4,047	3,086	20,609
2021-26	8,767	2,787	3,704	2,654	17,913
2026-31	6,784	1,628	752	2,196	11,360
2031-36	1,532	357	611	1,774	4,274
2036-41	554	177	448	1,452	2,631

VII.D BRAMPTON FORECAST TOTAL HOUSING

	Singles	Semis	Rows	Apts.	All Units
1996	41,500	9,813	9,147	20,717	81,177
2001	52,130	13,455	11,785	20,190	97,560
2006	71,773	19,817	14,199	20,866	126,655
2011	82,890	25,615	17,485	23,042	149,032
2016	93,681	30,593	21,630	26,235	172,139
2021	103,247	34,502	25,677	29,321	192,748
2026	112,015	37,290	29,382	31,975	210,661
2031	118,799	38,918	30,134	34,171	222,021
2036	120,331	39,275	30,745	35,945	226,296
2041	120,885	39,451	31,193	37,398	228,927

VII.F BRAMPTON SHARE OF PEEL HOUSING MARKET

	Singles	Semis	Rows	Apts.	Total
1986-91	31.3%	50.8%	31.1%	32.4%	31.5%
1991-96	26.2%	31.4%	27.8%	30.8%	28.5%
1996-01	43.4%	33.4%	31.3%	33.9%	38.8%
2001-06	66.2%	50.0%	31.5%	12.0%	52.2%
2006-11	65.0%	85.0%	47.0%	28.0%	57.8%
2011-16	72.0%	89.5%	63.0%	38.0%	65.0%
2016-21	77.0%	94.5%	75.0%	43.0%	70.7%
2021-26	80.0%	95.5%	81.0%	45.0%	73.6%
2026-31	73.0%	80.0%	20.0%	45.0%	56.9%
2031-36	20.0%	25.0%	20.0%	45.0%	26.6%
2036-41	10.0%	20.0%	20.0%	45.0%	22.1%

VII.F BRAMPTON SHARE OF GTA HOUSING MARKET

	Singles	Semis	Rows	Apts.	Total
1986-91	7.6%	-4.4%	11.1%	6.0%	7.0%
1991-96	8.0%	60.4%	7.7%	5.7%	7.1%
1996-01	10.5%	15.9%	8.5%	-5.8%	9.9%
2001-06	17.9%	25.6%	6.6%	1.2%	12.8%
2006-11	11.7%	25.5%	9.9%	3.1%	10.1%
2011-16	12.2%	24.6%	13.2%	4.6%	11.0%
2016-21	13.1%	23.6%	15.8%	6.0%	12.4%
2021-26	13.6%	21.0%	17.0%	6.3%	12.6%
2026-31	12.4%	16.8%	4.2%	6.3%	9.7%
2031-36	3.4%	5.0%	4.2%	6.3%	4.5%
2036-41	1.7%	4.0%	4.2%	6.3%	3.7%

Average Annual

2001-06	**3,929**	**1,272**	**483**	**135**	**5,819**
2001-21	**2,556**	**1,052**	**695**	**457**	**4,759**

APPENDIX 2:

BRAMPTON EMPLOYMENT FORECASTS, HEMSON CONSULTING, OCTOBER 2004

(LOW, MEDIUM & HIGH SCENARIOS)

APPENDIX 2: Brampton Employment Forecasts, Hemson Consulting, October 2004 (Low, Medium & High Scenarios)

REFERENCE SCENARIO INCLUDING NORTHWEST BRAMPTON

BRAMPTON EMPLOYMENT SUMMARY

Total Employment by Type

	Major Office	Population Related	Employment Lands	Total
1986	4,700	31,400	43,400	79,500
1991	5,900	39,100	47,600	92,600
1996	5,800	41,400	56,600	103,800
2001	7,700	50,200	75,700	133,600
2006	9,700	66,000	100,400	176,100
2011	18,600	79,200	129,800	227,600
2016	26,200	90,900	146,200	263,300
2021	32,800	99,800	156,400	289,000
2026	38,100	104,600	164,900	307,600
2031	43,500	105,200	174,100	322,800
2036	49,500	105,700	180,000	335,200
2041	55,600	107,100	182,200	344,900

Growth in Total Employment by Type

	Major Office	Population Related	Employment Lands	Total
1986-91	1,200	7,700	4,200	13,100
1991-96	-100	2,300	9,000	11,200
1996-01	1,900	8,800	19,100	29,800
2001-06	2,000	15,800	24,700	42,500
2006-11	8,900	13,200	29,400	51,500
2011-16	7,600	11,700	16,400	35,700
2016-21	6,600	8,900	10,200	25,700
2021-26	5,300	4,800	8,500	18,600
2026-31	5,400	600	9,200	15,200
2031-36	6,000	500	5,900	12,400
2036-41	6,100	1,400	2,200	9,700

Activity Rate	
1986	42.5%
1991	39.7%
1996	38.4%
2001	41.1%
2006	40.9%
2011	44.8%
2016	45.5%
2021	45.4%
2026	45.6%
2031	47.2%
2036	48.5%
2041	49.5%

EMPLOYMENT SUMMARY BY DISTRICT

Total Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	2,300	3,900	1,100	60,800	11,400	100	79,500
1991	2,300	5,200	1,100	70,300	13,500	100	92,600
1996	2,400	6,500	1,200	75,200	18,400	200	103,800
2001	2,600	10,900	1,700	86,800	31,600	100	133,600
2006	8,900	16,000	5,800	98,600	46,600	100	176,100
2011	24,800	22,500	11,500	110,800	57,900	100	227,600
2016	37,200	26,800	19,800	118,600	60,800	100	263,300
2021	44,000	29,100	25,900	124,400	62,200	3,300	289,000
2026	47,700	30,000	29,800	127,200	62,900	10,200	307,600
2031	49,900	30,600	33,200	128,700	62,900	17,600	322,800
2036	52,200	31,200	35,400	130,500	63,200	22,600	335,200
2041	54,800	31,800	36,300	132,900	63,900	25,200	344,900

Office Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	0	0	0	3,900	900	0	4,700
1991	0	200	0	5,100	700	0	5,900
1996	0	200	0	5,000	700	0	5,800
2001	100	400	0	6,400	800	0	7,700
2006	1,700	400	0	6,800	900	0	9,700
2011	6,200	900	0	9,900	1,700	0	18,600
2016	9,600	1,200	0	12,900	2,500	0	26,200
2021	12,200	1,600	300	15,500	3,200	0	32,800
2026	14,400	1,800	600	17,300	3,700	300	38,100
2031	16,200	2,100	900	19,200	4,200	800	43,500
2036	18,300	2,400	1,200	21,200	4,800	1,500	49,500
2041	20,500	2,700	1,500	23,300	5,500	2,100	55,600

Population-Related Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	100	1,100	100	30,100	0	0	31,400
1991	100	1,900	100	36,800	0	0	39,100
1996	200	2,800	100	38,300	0	100	41,400
2001	200	6,000	500	41,000	2,500	0	50,200
2006	3,600	8,700	2,200	48,700	2,700	0	66,000
2011	6,200	11,700	3,500	54,900	2,900	0	79,200
2016	8,600	14,100	5,200	59,700	3,300	0	90,900
2021	9,800	15,000	6,900	63,400	3,500	1,200	99,800
2026	10,000	15,200	7,100	64,800	3,700	3,900	104,600
2031	9,900	15,100	7,000	64,800	3,700	4,800	105,200
2036	9,900	15,100	7,100	64,900	3,700	5,000	105,700
2041	10,100	15,400	7,200	65,400	3,800	5,300	107,100

Employment Land Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	2,200	2,800	1,000	26,800	10,500	100	43,400
1991	2,200	3,100	1,000	28,400	12,800	100	47,600
1996	2,200	3,500	1,100	31,900	17,700	100	56,600
2001	2,300	4,500	1,200	39,400	28,300	100	75,700
2006	3,600	6,900	3,600	43,100	43,000	100	100,400
2011	12,400	9,900	8,000	46,000	53,300	100	129,800
2016	19,000	11,500	14,600	46,000	55,000	100	146,200
2021	22,000	12,500	18,700	45,500	55,500	2,100	156,400
2026	23,300	13,000	22,100	45,100	55,500	6,000	164,900
2031	23,800	13,400	25,300	44,700	55,000	12,000	174,100
2036	24,000	13,700	27,100	44,400	54,700	16,100	180,000
2041	24,200	13,700	27,600	44,200	54,600	17,800	182,200

APPENDIX 2: Brampton Employment Forecasts, Hemson Consulting, October 2004 (Low, Medium & High Scenarios)

WHAT IF? (HIGH) SCENARIO INCLUDING NORTHWEST BRAMPTON

BRAMPTON EMPLOYMENT SUMMARY

Total Employment by Type

	Major Office	Population Related	Employment Lands	Total
1986	4,700	31,400	43,400	79,500
1991	5,900	39,100	47,600	92,600
1996	5,800	41,400	56,600	103,800
2001	7,800	50,200	75,700	133,700
2006	9,700	66,100	100,400	176,200
2011	18,600	82,400	130,700	231,700
2016	26,200	96,700	147,600	270,500
2021	33,500	104,300	157,700	295,500
2026	39,500	105,600	166,300	311,400
2031	45,500	105,600	175,500	326,600
2036	52,200	106,200	181,300	339,700
2041	59,000	107,700	183,500	350,200

Growth in Total Employment by Type

	Major Office	Population Related	Employment Lands	Total
1986-91	1,200	7,700	4,200	13,100
1991-96	-100	2,300	9,000	11,200
1996-01	2,000	8,800	19,100	29,900
2001-06	1,900	15,900	24,700	42,500
2006-11	8,900	16,300	30,300	55,500
2011-16	7,600	14,300	16,900	38,800
2016-21	7,300	7,600	10,100	25,000
2021-26	6,000	1,300	8,600	15,900
2026-31	6,000	0	9,200	15,200
2031-36	6,700	600	5,800	13,100
2036-41	6,800	1,500	2,200	10,500

Activity Rate

1986	42.5%
1991	39.7%
1996	38.4%
2001	41.1%
2006	41.0%
2011	44.0%
2016	44.1%
2021	44.6%
2026	45.9%
2031	47.7%
2036	49.2%
2041	50.3%

EMPLOYMENT SUMMARY BY DISTRICT

Total Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	2,300	3,900	1,100	60,800	11,400	100	79,500
1991	2,300	5,200	1,100	70,300	13,500	100	92,600
1996	2,400	6,500	1,200	75,200	18,400	200	103,800
2001	2,700	10,900	1,700	86,800	31,600	100	133,700
2006	9,400	15,600	5,800	98,200	47,100	100	176,200
2011	26,200	22,100	12,200	112,000	59,300	100	231,700
2016	38,900	26,700	21,300	121,200	62,200	300	270,500
2021	44,800	28,700	26,500	126,200	63,200	6,200	295,500
2026	48,100	29,700	30,100	128,100	63,300	12,000	311,400
2031	50,500	30,700	33,500	129,000	63,500	19,300	326,600
2036	53,200	31,400	35,600	130,900	63,900	24,600	339,700
2041	55,900	32,100	36,700	133,600	64,500	27,400	350,200

Office Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	0	0	0	3,900	900	0	4,700
1991	0	200	0	5,100	700	0	5,900
1996	0	200	0	5,000	700	0	5,800
2001	200	400	0	6,400	800	0	7,800
2006	1,700	400	0	6,800	900	0	9,700
2011	6,200	900	0	9,900	1,700	0	18,600
2016	9,600	1,200	0	12,900	2,500	0	26,200
2021	12,500	1,600	400	15,400	3,200	400	33,500
2026	14,600	1,900	700	17,500	3,800	1,000	39,500
2031	16,700	2,200	1,000	19,500	4,400	1,600	45,500
2036	19,000	2,500	1,300	21,800	5,100	2,300	52,200
2041	21,400	2,900	1,700	24,200	5,800	3,000	59,000

Population-Related Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	100	1,100	100	30,100	0	0	31,400
1991	100	1,900	100	36,800	0	0	39,100
1996	200	2,800	100	38,300	0	100	41,400
2001	200	6,000	500	41,000	2,500	0	50,200
2006	4,100	8,300	2,200	48,300	3,200	0	66,100
2011	7,300	11,200	4,000	56,000	3,900	0	82,400
2016	9,900	13,800	6,400	62,200	4,300	200	96,700
2021	10,400	14,400	7,100	65,200	4,600	2,700	104,300
2026	10,300	14,300	7,000	65,400	4,600	4,000	105,600
2031	10,100	14,100	6,900	65,200	4,600	4,700	105,600
2036	10,200	14,200	6,900	65,400	4,600	4,900	106,200
2041	10,400	14,500	7,100	65,900	4,600	5,200	107,700

Employment Land Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	2,200	2,800	1,000	26,800	10,500	100	43,400
1991	2,200	3,100	1,000	28,400	12,800	100	47,600
1996	2,200	3,500	1,100	31,900	17,700	100	56,600
2001	2,300	4,500	1,200	39,400	28,300	100	75,700
2006	3,600	6,900	3,600	43,100	43,000	100	100,400
2011	12,700	10,000	8,200	46,100	53,700	100	130,700
2016	19,400	11,700	14,900	46,100	55,400	100	147,600
2021	21,900	12,700	19,000	45,600	55,400	3,100	157,700
2026	23,200	13,500	22,400	45,200	54,900	7,000	166,300
2031	23,700	14,400	25,600	44,300	54,500	13,000	175,500
2036	24,000	14,700	27,400	43,700	54,200	17,400	181,300
2041	24,100	14,700	27,900	43,500	54,100	19,200	183,500

APPENDIX 2: Brampton Employment Forecasts, Hemson Consulting, October 2004 (Low, Medium & High Scenarios)

LOW SCENARIO INCLUDING NORTHWEST BRAMPTON

BRAMPTON EMPLOYMENT SUMMARY

Total Employment by Type

	Major Office	Population Related	Employment Lands	Total
1986	4,700	31,400	43,400	79,500
1991	5,900	39,100	47,600	92,600
1996	5,800	41,400	56,600	103,800
2001	7,800	50,200	75,700	133,700
2006	9,700	64,600	99,500	173,800
2011	17,200	75,800	120,000	213,000
2016	23,300	85,400	133,600	242,300
2021	27,400	93,200	139,700	260,300
2026	29,800	98,700	142,300	270,800
2031	31,900	101,600	144,200	277,700
2036	34,700	102,200	146,800	283,700
2041	37,600	103,200	148,300	289,100

Growth in Total Employment by Type

	Major Office	Population Related	Employment Lands	Total
1986-91	1,200	7,700	4,200	13,100
1991-96	-100	2,300	9,000	11,200
1996-01	2,000	8,800	19,100	29,900
2001-06	1,900	14,400	23,800	40,100
2006-11	7,500	11,200	20,500	39,200
2011-16	6,100	9,600	13,600	29,300
2016-21	4,100	7,800	6,100	18,000
2021-26	2,400	5,500	2,600	10,500
2026-31	2,100	2,900	1,900	6,900
2031-36	2,800	600	2,600	6,000
2036-41	2,900	1,000	1,500	5,400

Activity Rate

1986	42.5%
1991	39.7%
1996	38.4%
2001	41.1%
2006	40.4%
2011	40.4%
2016	39.5%
2021	39.3%
2026	39.9%
2031	40.6%
2036	40.9%
2041	41.4%

EMPLOYMENT SUMMARY BY DISTRICT

Total Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	2,300	3,900	1,100	60,800	11,400	100	79,500
1991	2,300	5,200	1,100	70,300	13,500	100	92,600
1996	2,400	6,500	1,200	75,200	18,400	200	103,800
2001	2,700	10,900	1,700	86,800	31,600	100	133,700
2006	9,100	15,300	5,800	97,000	46,600	100	173,800
2011	21,700	19,900	9,200	106,200	56,000	100	213,000
2016	31,900	23,900	13,800	112,900	59,600	300	242,300
2021	36,800	25,800	16,200	117,700	61,200	2,500	260,300
2026	39,600	26,900	17,400	120,600	61,800	4,300	270,800
2031	41,700	27,700	18,300	122,400	62,200	5,400	277,700
2036	44,000	28,400	19,100	123,300	62,600	6,300	283,700
2041	46,000	28,900	19,800	124,600	62,900	6,900	289,100

Office Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	0	0	0	3,900	900	0	4,700
1991	0	200	0	5,100	700	0	5,900
1996	0	200	0	5,000	700	0	5,800
2001	200	400	0	6,400	800	0	7,800
2006	1,700	400	0	6,800	900	0	9,700
2011	5,400	800	0	9,400	1,600	0	17,200
2016	8,200	1,100	0	11,800	2,200	0	23,300
2021	9,900	1,300	200	13,400	2,600	0	27,400
2026	10,800	1,400	300	14,300	2,900	0	29,800
2031	11,700	1,500	500	15,200	3,100	0	31,900
2036	12,800	1,700	600	16,300	3,400	0	34,700
2041	14,000	1,800	800	17,400	3,700	0	37,600

Population-Related Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	100	1,100	100	30,100	0	0	31,400
1991	100	1,900	100	36,800	0	0	39,100
1996	200	2,800	100	38,300	0	100	41,400
2001	200	6,000	500	41,000	2,500	0	50,200
2006	3,900	8,100	2,200	47,200	3,200	0	64,600
2011	6,600	10,200	3,600	51,800	3,700	0	75,800
2016	8,600	11,900	5,500	55,400	3,900	200	85,400
2021	9,100	12,700	6,200	58,600	4,200	2,400	93,200
2026	9,800	13,300	6,600	60,700	4,300	3,900	98,700
2031	10,100	13,700	6,800	61,700	4,400	4,800	101,600
2036	10,200	13,800	6,900	61,800	4,500	5,000	102,200
2041	10,300	14,000	7,000	62,100	4,500	5,200	103,200

Employment Land Employment by District

	Area 1 SW	Area 2 North	Area 3 NE	Area 4 Central	Area 5 SE	Area 6 NW	Total
1986	2,200	2,800	1,000	26,800	10,500	100	43,400
1991	2,200	3,100	1,000	28,400	12,800	100	47,600
1996	2,200	3,500	1,100	31,900	17,700	100	56,600
2001	2,300	4,500	1,200	39,400	28,300	100	75,700
2006	3,500	6,800	3,600	43,000	42,500	100	99,500
2011	9,700	8,900	5,600	45,000	50,700	100	120,000
2016	15,100	10,900	8,300	45,700	53,500	100	133,600
2021	17,800	11,800	9,800	45,700	54,400	100	139,700
2026	19,000	12,200	10,500	45,600	54,600	400	142,300
2031	19,900	12,500	11,000	45,500	54,700	600	144,200
2036	21,000	12,900	11,600	45,200	54,700	1,300	146,800
2041	21,700	13,100	12,000	45,100	54,700	1,700	148,300