Retail Policy Review Study
Brampton Official Plan Review

Executive Summary

Submitted To:

City of Brampton
Planning, Design & Development Department

Submitted By:

MALONE GIVEN PARSONS LTD.

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The City of Brampton
Planning, Design & Development Department
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EXECUTIVE SUMMARY

Malone Given Parsons Ltd. (MGP) was retained by the City of Brampton to carry out a Retail Policy Review Study of the Brampton Official Plan. The study assesses Brampton Official Plan retail policies, examines the existing market context and expected demand over the study period to 2031, and recommends modifications to policies to ensure they respond effectively to current and emerging commercial trends and projected future growth.

In order to address the study objectives, the Retail Policy Review Study was carried out in two phases. Phase 1 of the study provides a review of the existing planning, commercial, and market context and forecasts retail/commercial space needs in Brampton over the study period to 2031.

Phase 2 of the study builds on Phase 1 and assesses directions of growth in the context of commercial trends and implications regarding the City of Brampton OP retail policies and hierarchy of designations. The market research, analysis, and findings of the study provide a basis upon which to recommend a strategy to direct future growth and to recommend potential modifications to the existing retail policies and/or hierarchy of designations within the Brampton Official Plan.

This document provides a summary of the research, analysis, and findings of the Retail Policy Review Study.

Planning Context

Brampton's commercial structure is based on a hierarchy of retail designations.

The City of Brampton's commercial structure and hierarchy of commercial uses is defined in the Economic Base section of City's Official Plan. The following retail categories are included in Brampton's Retail Dominant Sector:

- Central Area
- Regional Retail
- Local Retail
    - District Retail
    - Neighbourhood Retail
    - Convenience Retail

Other commercial permissions are included in the following designations.

- Business Industrial; and,
- Industrial.

In addition to Brampton's commercial hierarchy identified in the OP, some small scale commercial sites or clusters are recognized in Secondary Plans. Small scale business, office, retail and service establishments that do not fit in the definitions of Convenience or Neighbourhood Retail may be permitted, primarily in residential Secondary Plans. These establishments are typically located on sites that are 2 hectares (4.9 acres) in size or smaller.

The following table provides a summary comparison of the generic retail/commercial hierarchy often found in other municipal OPs, with that defined by the Brampton OP retail designations.

Comparison of a Generic Hierarchy and Brampton's OP Retail Hierarchy of Designations

Generic Retail/Commercial Hierarchy	Brampton OP Designation
Regional	Regional Retail
District	District Retail
Community	Similar to District Retail
Neighbourhood	Neighbourhood Retail
Convenience	Convenience Retail
Arterial Commercial or Commercial Corridor	Similar to Business Industrial in OP Similar to Highway Commercial, Highway and Service Commercial, and Mixed Commercial-Light Industrial in Secondary Plans
Downtown	Central Area in OP and Central Area Mixed Use in relevant Secondary Plans
Mixed Use	Addressed in Secondary Plans

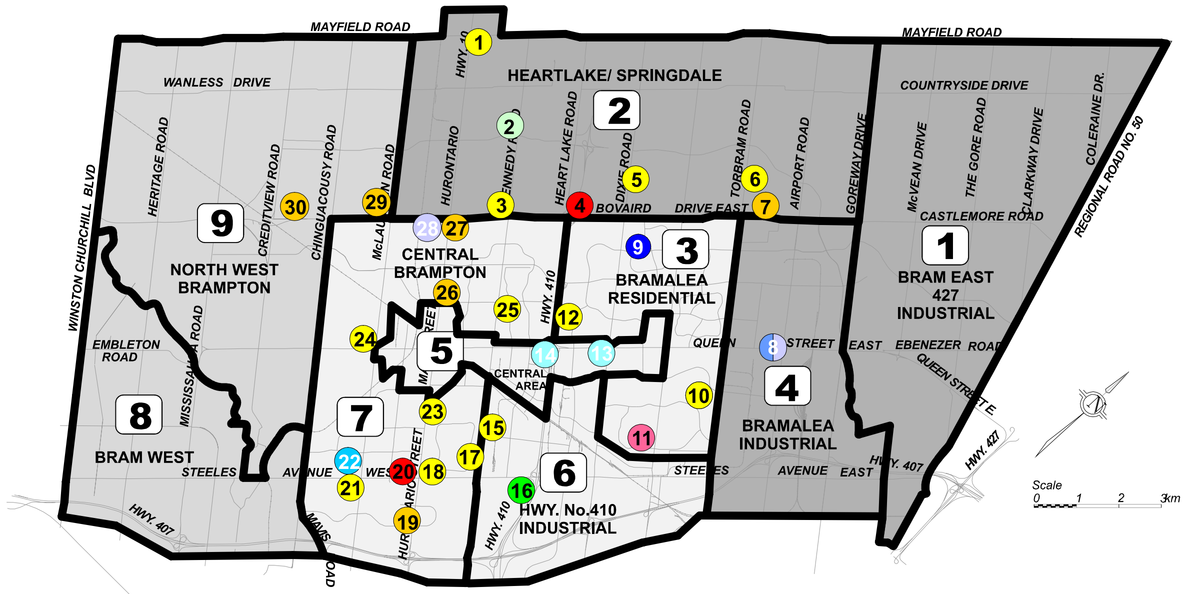
Land use designations within Brampton's commercial structure are common to those found in other Ontario Official Plans, but the OP does not specifically identify Community Commercial, Arterial Commercial/ Commercial Corridor or Retail Warehouse, or Mixed Use designations as often found in other OPs.

The commercial hierarchy defined in Brampton's Official Plan is similar to those often found in other Ontario municipal Official Plans. Brampton's hierarchy of retail policies includes a Central Area, a Regional Retail designation, and the local retail designations (including District Retail, Neighbourhood Retail, and Convenience Retail) which help to distinguish between the role, function, size, and permitted uses of commercial facilities distributed throughout Brampton.

Brampton's Central Area designation is similar to that of other municipalities', recognizing a focal point of the City and providing for higher order uses that serve a large market area. Brampton's Regional Retail designation provides for commercial uses that serve both City residents and those in surrounding areas, offering a wide range of goods and services. Local retail designations (District Retail, Neighbourhood Retail, and Convenience Retail) provide for more localized and neighbourhood serving uses similar to designations typically found in other municipalities.

Despite many similarities to other Official Plans and a general retail hierarchy, the Brampton Official Plan does not specifically include Community Commercial, Arterial Commercial/Commercial Corridor, Retail Warehouse, or Mixed-Use designations as often found in other Official Plans.

The following map illustrates the location of major shopping centres and plazas in Brampton and their respective designations as defined by the OP and/or respective Secondary Plan.



	Northeast Brampton
	Central Brampton
	West Brampton

Secondary Plan Designations

- Central Area
- Regional Commercial
- District Commercial
- Neighbourhood Commercial
- Highway Commercial
- Highway and Service Commercial
- Town Centre
- Mixed Commercial - Light Industrial
- Convenience Commercial
- Community Commercial
- Commercial/ General Commercial
- Zone Boundary

Shopping Centres & Major Plazas in Brampton

Northeast Brampton

1 **Sobeys Plaza - 47,100 sq.ft.**
Sobeys - 34,600 sq.ft.

2 **Heart Lake Town Centre - 104,300 sq.ft.**
A&P - 39,600 sq.ft.

3 **Conestoga Square Plaza - 106,000 sq.ft.**
Price Chopper - 44,200 sq.ft.

4 **Trinity Common - 900,200 sq.ft.**
Home Depot - 130,000 sq.ft.
Zellers - 118,600 sq.ft.
Canadian Tire - 100,000 sq.ft.
A&P - 55,100 sq.ft.

5 **Woodsmere Shopping Centre - 69,200 sq.ft.**
Price Chopper - 30,400 sq.ft.

6 **Peter Robertson Plaza - 43,200 sq.ft.**

7 **Springdale Square - 115,000 sq.ft.**
Fortinos - 60,100 sq.ft.

8 **Hwy 7 & Airport Road - 462,200 sq.ft.**
Wal-Mart - 131,800 sq.ft.
Rona - 132,000 sq.ft.
Canadian Tire - 95,200 sq.ft.

Central Brampton

9 **McKay Plaza - 62,300 sq.ft.**
Sobeys - 35,000 sq.ft.

10 **Southgate S. C. - 48,800 sq.ft.**
No Frills - 24,200 sq.ft.

11 **Avondale Plaza - 44,700 sq.ft.**
IGA - 7,800 sq.ft.

12 **Lakeridge Plaza - 56,900 sq.ft.**
IGA - 15,400 sq.ft.

13 **Bramalea City Centre - 1,115,700 sq.ft.**
The Bay - 131,800 sq.ft.
Sears - 157,200 sq.ft.
Zellers - 120,800 sq.ft.
A&P - 63,600 sq.ft.
Price Chopper - 26,000 sq.ft.

14 **Bramrose Square - 238,400 sq.ft.**
Sears Outlet Store - 79,300 sq.ft.
No Frills - 59,800 sq.ft.

15 **Kennedy Plaza - 139,200 sq.ft.**
Chinese Supermarket - 55,700 sq.ft.

16 **Orion Gate - 591,600 sq.ft.**
Home Depot - 131,000 sq.ft.
Costco - 117,000 sq.ft.

17 **Goldbright Plaza - 21,100 sq.ft.**

18 **Bartley's Square - 74,700 sq.ft.**
Food Basics - 23,700 sq.ft.

19 **City South Plaza - 189,800 sq.ft.**
The Bay Furniture - 65,000 sq.ft.
Longos Fruit Market - 46,000 sq.ft.

20 **Shoppers World Brampton - 797,200 sq.ft.**
The Bay - 138,000 sq.ft.
Zellers - 115,700 sq.ft.
Canadian Tire - 80,300 sq.ft.
Staples - 26,600 sq.ft.
Price Chopper - 42,200 sq.ft

21 **College Plaza - 41,600 sq.ft.**
No Frills - 15,300 sq.ft.

22 **Charolais Plaza- 28,400 sq.ft.**
Golden Grocery - 8,500 sq.ft.

23 **Brampton Mall - 135,900 sq.ft.**
A&P - 26,800 sq.ft.

24 **Westbram Shopping Centre - 61,200 sq.ft.**
Price Chopper (formerly Sobeys) - 42,000 sq.ft.

25 **Centennial Mall - 170,700 sq.ft.**
Zellers - 84,200 sq.ft.
Food Basics - 28,900 sq.ft.

26 **Kingspoint Plaza - 144,300 sq.ft.**
A&P - 39,000 sq.ft. (Closed summer 2004)

27 **Brampton Corners - 287,800 sq.ft.**
(Yellow Brick plaza)
Wal-Mart - 160,000 sq.ft.
Fortinos - 69,900 sq.ft.

28 **Rona Home & Garden Centre - 179,400 sq.ft.**
Rona (formerly Building Box) - 98,800 sq.ft.

West Brampton

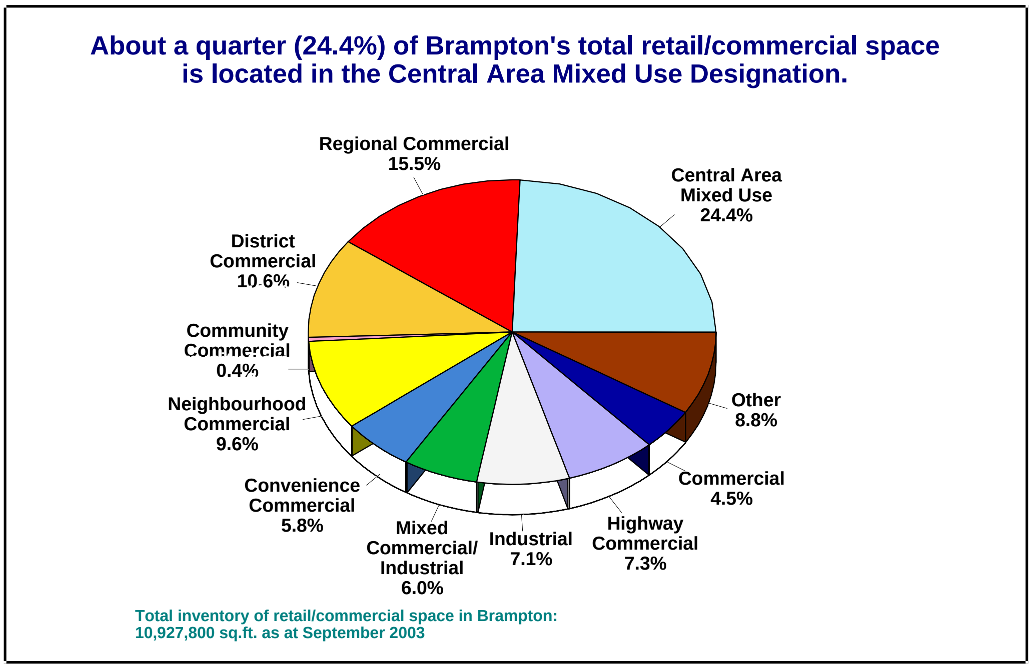
29 **McLaughlin Corners - 115,700 sq.ft.**
A&P - 50,500 sq.ft.

30 **Fletcher's Meadow - 210,800 sq.ft.**
Fortinos - 120,000 sq.ft.

Performance of Existing Hierarchy

The existing retail/commercial uses and major commercial clusters of space in Brampton, to varying degrees, reflect the existing hierarchy of commercial designations and their related policies.

Brampton's existing commercial space is grouped within about 20 different land use designations identified by the many Secondary Plans. About a quarter (24.4%) of Brampton's retail/commercial space is located in the Central Area Mixed Use designation. Regional Retail, District Retail, Neighbourhood Retail, and Convenience Retail designations account for 41.5% of the inventory. Industrial lands contain about 7% of Brampton's commercial space. The balance, over a quarter of the space (27.1%), is allocated within other designations, many of which are unique to particular Secondary Plans.



Assessment of Brampton's OP Hierarchy of Retail Designations

The original intent of the Brampton OP hierarchy of retail designations is still sound, although specific policies need updating.

Brampton's OP retail designations define a hierarchy of retail/commercial establishments and concentrations of space varying by size, type, role, and function. The designations generally reflect uses that:

- function to serve large regional areas;
- function to serve district areas; and,
- function to serve local areas.

In summary:

- The **Central Area** is fulfilling its role as a mixed-use area as described in the Brampton OP policies but its role could be reinforced and enhanced by refining the OP policies.

- The **Regional Retail** policies in the Brampton OP generally reflect and are consistent with the role and function of the city's two designated Regional Retail centres: Trinity Common and Shoppers World. The Regional Retail policies describe groups of commercial establishments that are generally planned and developed in an integrated fashion to provide a wide range of specialized and comparison type goods and services to local residents as well as consumers from outside Brampton. The size range set by the OP of 300,000 sq.ft. to 1,200,000 sq.ft. GLA, is quite broad considering the size of Trinity Common and Shoppers World are about 900,000 sq.ft. and 800,000 sq.ft. respectively, and considering district centres often range up to 500,000 sq.ft. Both of Brampton's Regional Retail centres include discount department stores. The OP policies state that permitted uses within Regional Retail designations include all types of retail stores including major full line department stores and a list of other uses, while District Retail centres are described in the OP as typically anchored by a junior or discount department store.

- The **District Retail** policies in the Brampton OP define such centres or group of establishments that generally range from 97,000 sq.ft. to 300,000 sq.ft. GLA and are typically anchored by a junior or discount department store that serves a major sub-area of the City. Brampton's District Retail designated centres are within the size range specified by the OP. However, only one District Retail designated centre in Brampton is anchored by a department store. Most District Retail centres are anchored by a supermarket.

- The **Neighbourhood Retail** policies in the Brampton OP define such centres and group of retail establishments as generally ranging in size from 15,000-81,000 sq.ft., and are typically anchored by a supermarket. The OP policies are generally consistent with Brampton's existing Neighbourhood Retail centres since they are generally anchored by a supermarket. However, the size range specified in the OP is low compared with the size of some of the Neighbourhood Retail centres in Brampton, and considering commercial trends towards larger format stores (in particular, supermarkets), and in turn, the total shopping centre size.

- The **Convenience Retail** designation of the Brampton OP defines one or more retail and service establishments which generally range in size from 5,400-15,000 sq.ft. The size range set out in the OP policies is low compared with the size of existing Convenience Retail establishments and plazas in Brampton, and considering commercial trends towards larger format stores and, in turn, the total development size.

Brampton's OP permits some retail/commercial uses within the Business Industrial and Industrial designations.

- The **Business Industrial** designation of the Brampton OP may permit selected retail warehousing and retail uses including: home improvement centres, supermarkets and specialty food stores, large furniture and appliance stores, and major toy or sporting goods stores through specific sub-designations in Secondary Plans, subject to development criteria including consideration of market demand and impact. Brampton's Business Industrial designations permit a significant amount retail/commercial space including the 590,000 sq.ft., regional serving Orion Gate power centre.

- The **Industrial** designation of the Brampton OP permits ancillary and limited retail and business serving uses, and community service uses in industrial malls. However, a significant amount retail space is found in Industrial designations.

The following categories are not specified in Brampton's hierarchy of OP designations but their function is encompassed by other designations within the Official Plan and Secondary Plans.

- A **Community** designation is **not specified in the Brampton OP**, although the role and function of community centres is generally described by Brampton's OP District Retail designation. A Community Commercial designation is identified by Secondary Plans.

- A **Commercial Corridor or Highway Commercial** designation is **not specified in the Brampton OP**, although the role and function of commercial corridor and highway commercial areas is generally described by Brampton's OP Business Industrial designation. Similar designations are specified by Secondary Plans.

- A **Mixed Use** designation is **not specified in the Brampton OP**, although similar designations are specified by Secondary Plans.

In general, the original intent of the Brampton OP hierarchy of retail designations is still sound, although specific policies need updating considering the many inconsistencies between existing uses and the OP policies.

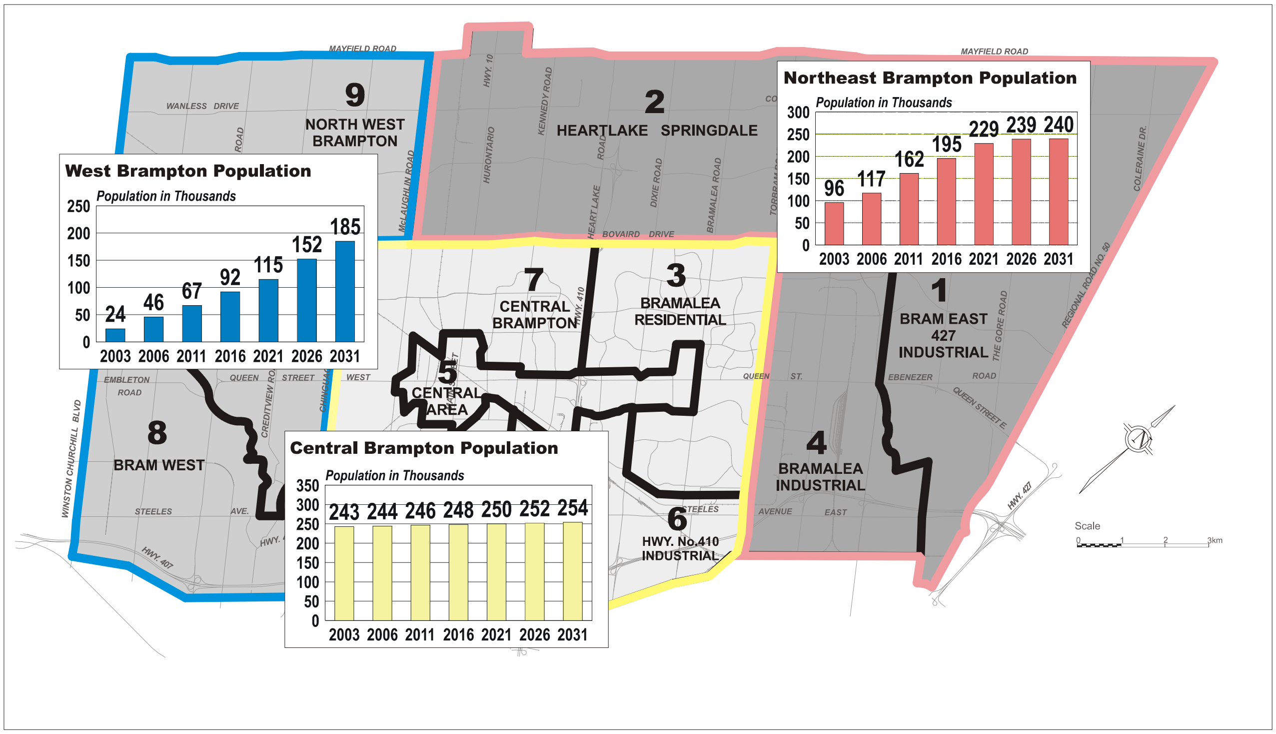
Commercial Demand and Directions of Growth

The doubling of population in Brampton drives the need for about double the amount of existing commercial space by 2031.

Population growth is one of the key determinants that drives need and demand for additional commercial services in a market. Since Brampton's population is forecast to increase by about 315,000 people from about 363,000 in 2003 to 678,000 in 2031 (as illustrated on the following table), there is a need for a significant amount of new commercial space. With the doubling of population from 2003 to 2031, there is demand for about double the amount of existing commercial space that is provided today.

City of Brampton Population and Projections

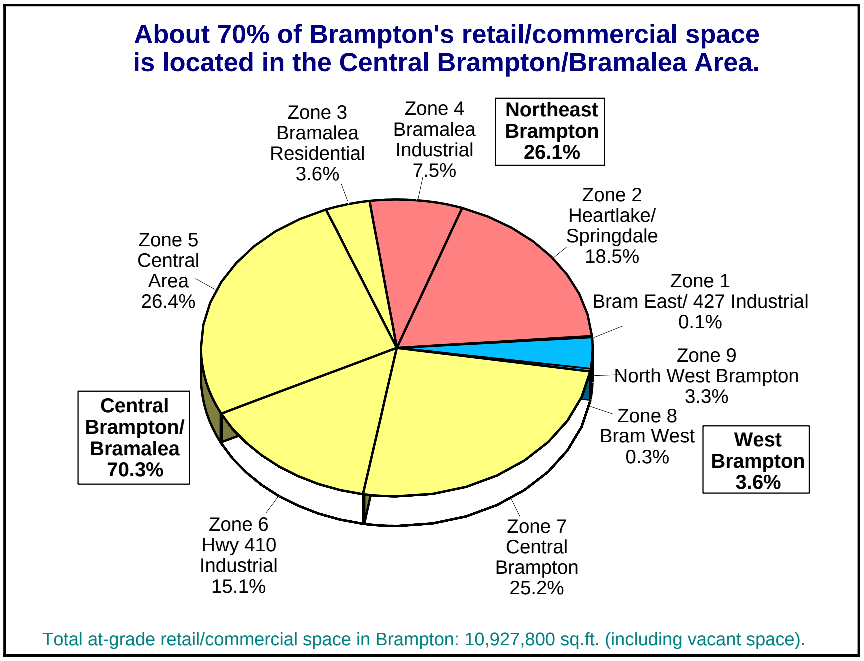
	2003	2006	2011	2016	2021	2026	2031	Cumulative Growth 2003-2031
Zone 1: Bram East/427 Industrial	8,300	14,900	29,900	45,000	60,500	67,000	68,000	59,700
Zone 2: Heartlake/Springdale	86,400	98,900	124,000	142,100	160,400	163,800	163,700	77,300
Zone 4: Bramalea Industrial	1,100	3,200	7,600	8,200	8,100	8,000	7,900	6,800
Subtotal Northeast Brampton	95,800	117,000	161,500	195,300	229,000	238,800	239,600	143,800
Zone 3: Bramalea Residential	71,300	70,800	70,000	68,800	67,600	66,700	66,100	(5,200)
Zone 5: Cental Area	27,400	28,200	28,700	31,100	36,100	39,000	43,000	15,600
Zone 6: Hwy. 410 Industrial	1,300	1,300	1,300	1,300	1,300	1,200	1,200	(100)
Zone 7: Central Brampton	142,800	143,900	146,400	147,100	145,200	145,000	143,800	1,000
Subtotal Central Brampton	242,800	244,200	246,400	248,300	250,200	251,900	254,100	11,300
Zone 8: Bram West	1,400	4,100	13,000	24,300	30,900	32,900	33,400	32,000
Zone 9: Northwest Brampton	22,600	41,600	53,800	67,600	84,000	119,300	151,300	128,700
Subtotal West Brampton	24,000	45,700	66,800	91,900	114,900	152,200	184,700	160,700
Total Brampton	**362,600**	**406,900**	**474,700**	**535,500**	**594,100**	**642,900**	**678,400**	**315,800**



City of Brampton Population and Projection by Zone

Brampton has over 10 million square feet of existing retail/commercial space, most of which is located in the Central Brampton/Bramalea area.

An inventory of all existing retail/commercial space in Brampton was carried out in 2003. Of the city's 10,927,800 sq.ft. of retail/commercial space, most (about 70% or 7,694,100 sq.ft.) is located in the Central Brampton/Bramalea area. The following chart summarizes the distribution of existing occupied and vacant retail/commercial space in Brampton.



A target population of 678,000 in 2031 generates demand for about 10 million square feet of additional retail/commercial space in Brampton.

The market opportunity and residual analyses findings summarized on the following table, illustrate the general amount and phasing of additional retail/commercial space that is warranted in Brampton to 2031. Based on a population target of about 678,000 in 2031, an additional 10.3 million square feet of retail/commercial space is required in Brampton.

Summary of Additional Retail/Commercial Space Demand: 2003-2031

	Existing Occupied Retail/Commercial Space in 2003 (sq.ft.)	Additional Warranted Space Demand From 2003						Total Forecast Space in 2031
		2006	2011	2016	2021	2026	2031	
Supermarket	1,120,000	150,000	410,000	590,000	810,000	920,000	1,070,000	2,190,000
Other FSTM	440,000	80,000	210,000	270,000	360,000	380,000	440,000	880,000
Department Store Space	1,290,000	170,000	580,000	700,000	1,030,000	1,050,000	1,290,000	2,580,000
Non-department store DSTM	3,610,000	490,000	1,510,000	1,950,000	2,840,000	2,990,000	3,680,000	7,290,000
WMC	120,000	100,000	160,000	200,000	260,000	250,000	290,000	410,000
Home Improvement	550,000	80,000	250,000	320,000	470,000	490,000	610,000	1,160,000
Subtotal (sq.ft.)	**7,130,000**	**1,070,000**	**3,120,000**	**4,030,000**	**5,770,000**	**6,080,000**	**7,380,000**	**14,510,000**
Restaurant/Fast Food	1,240,000	150,000	380,000	590,000	790,000	960,000	1,080,000	2,320,000
Entertainment	330,000	40,000	100,000	160,000	210,000	250,000	280,000	610,000
Personal Services	880,000	110,000	270,000	420,000	560,000	680,000	760,000	1,640,000
Other Service and Other Retail/Commercial	900,000	110,000	280,000	430,000	580,000	700,000	790,000	1,690,000
Subtotal Services (sq.ft.)	**3,350,000**	**410,000**	**1,030,000**	**1,600,000**	**2,140,000**	**2,590,000**	**2,910,000**	**6,260,000**
Total (sq.ft.)	**10,480,000**	**1,480,000**	**4,150,000**	**5,630,000**	**7,910,000**	**8,670,000**	**10,290,000**	**20,770,000**

(1) Other Services includes medical, dental, mail boxes, photocopy shops, telephone services, auto services and repair, car rental etc., but excludes other service office space.
(2) Other Commercial includes LCBO, beer store, wine making, second hand merchandise stores.

The large floor plate commercial facilities such as supermarkets, department stores, WMCs, and large scale home improvement centres are the main determinants that establish the role, form, and function of large scale shopping centres and commercial areas. As summarized on the following table, there is demand for an additional 9-17 supermarkets, 8-11 department stores, 2 WMCs, and 4-5 large floor plate home improvement centres by 2031.

Existing and Forecast Retail/Commercial Floor Space in Brampton to 2031

	Existing Space Sq.ft. in 2003 (rounded)	Total # of Stores in 2003	Additional Demand to 2031	Additional # of Stores to 2031	Total Space in 2031 Mid Range	Total # of Stores in 2031
Population:	***362,600***	***362,600***			***678,400***	***678,400***
Supermarket (5)	1,120,000	28	1,070,000	9-17	2,190,000	37-45
Other FSTM	440,000	--	440,000	--	880,000	--
Department Store Space	1,290,000	11	1,290,000	8-11	2,580,000	19-22
Non-department store DSTM	3,610,000	--	3,680,000	--	7,290,000	--
WMC	120,000	1	290,000	2	410,000	3
Home Improvement (3)	550,000	3	610,000	4-5	1,160,000	7-8
Subtotal (sq.ft.)	7,130,000		7,380,000		14,510,000	
Restaurant/Fast Food	1,240,000		1,080,000		2,320,000	
Entertainment	330,000		280,000		610,000	
Personal Services	880,000		760,000		1,640,000	
Other Service and Other Retail/Commercial	900,000		790,000		1,690,000	
Subtotal Services (sq.ft.)	**3,350,000**		**2,910,000**		**6,260,000**	
Total (sq.ft.)	**10,480,000**		**10,290,000**		**20,770,000**	

(1) Population sourced from the City of Brampton based on Hemson Consulting forecasts.
(2) Other Services includes medical, dental, mail boxes, photocopy shops, telephone services, auto services and repair, car rental etc.
(3) Other Commercial includes LCBO, beer store, wine making, second hand merchandise stores.
(4) The number of existing and additional stores relates to large format home improvement centres only.
(5) A total of 28 existing supermarkets as at the date of inventory
(6) The number of anchor stores to meet future needs is a function of the average sizes which are expected to continue to increase.

The demand tables show that a significant amount of additional FSTM (food store type merchandise), DSTM (department store type merchandise), home improvement, and other commercial and service space is warranted in Brampton over the next three decades. The market analysis illustrates additional demand and opportunity for:

- About 1.5 million sq.ft of FSTM space by 2031 of which supermarket space represents about 1 million sq. ft. and specialty food/other FSTM represents about 400,000 sq.ft. The FSTM space could take the form of 9 large format supermarkets, or 17 mid sized supermarkets, or a rationalization and/or expansion to existing supermarkets, along with the addition of other specialty food store space;

- About 1.29 million sq.ft. of department store space which could take the form of 8-11 new department stores or a combination of new stores and expansions to existing department stores;

- About 3.68 million sq.ft. of additional non-department store DSTM space;
- Close to 300,00 sq.ft. of WMC space which could take the form of 2-3 WMC facilities;
- About 600,000 sq.ft. of home improvement space which could take the form of 4-5 large format centres; and,
- About 2.9 million sq.ft. of personal services, restaurants, financial institutions, banks, entertainment facilities, other services and commercial space.

Growth in the Northeast and West parts of Brampton drives need and demand for additional retail/commercial facilities.

Increased demand for commercial services is mainly triggered by an increase in the population base in a market area. Directions of future population growth in Brampton's Northeast and West areas are referenced as a guide to plan for strategic locations to accommodate new commercial space in Brampton and to provide adequate services to evolving community and neighbourhood areas.

The location of new residential areas determines, to an extent, the demand for certain types of commercial facilities, particularly those which serve the daily and weekly needs of residents, as well as providing for regional serving commercial facilities and concentrations of space.

Planned and Proposed Commercial Development

The amount and type of retail/commercial space represented by planned and proposed additions, does not satisfy future requirements.

The planned and proposed commercial development information indicates that there is about 5.8 million square feet of commercial space currently represented by designated lands and planned and approved additions. Of this space, about half (49.3%) or 2.9 million sq. ft. is planned in the Northeast Brampton Area, almost 1 million sq.ft. is planned within Central Brampton Area, and about 2.1 million sq.ft. is planned in the West Brampton Area.

The designated and planned commercial space includes a range of uses from small scale service and convenience commercial space, to larger neighbourhood and community sized shopping centres and district centres. Land proposed for development is generally following the directions of population growth in Brampton.

The 5.8 million sq.ft. of designated and planned additional space does not satisfy the future commercial space needs and demand for about 10.3 million sq. ft. of additional retail/commercial space with a target population of 678,000 in 2031.

This represents a short fall of unallocated demand totalling about 4.5 million sq.ft. Most of the additional retail/commercial space demand and additional land to accommodate future demand, will be required in the Northeast and West Brampton areas.

The following table compares the retail/commercial demand by area, with additional supply of retail/commercial space in the planning process which is planned, proposed, or could be accommodated on designated land which permits commercial development.

Summary of Retail/Commercial Space Demand Compared With Planned and Approved Retail/Commercial Development by Area in Brampton

	Additional Retail/Commercial Demand in 2031 (sq.ft.)	Estimated Retail/Commercial Space within Approved Applications (sq.ft.)	Estimated Retail/Commercial Space within Existing Designations with No Applications (sq.ft.)	**Total Planned & Approved Retail/ Commercial Space (sq.ft.)**	Unallocated Demand (sq.ft.)
Northeast Brampton	4,200,000	2,530,000	333,000	**2,863,000**	1,337,000
Central Brampton	1,300,000	816,000	16,000	**832,000**	468,000
West Brampton	4,800,000	319,000	1,794,000	**2,113,000**	2,687,000
Total Brampton	**10,300,000**	**3,665,000**	**2,143,000**	**5,808,000**	**4,492,000**

Note: The total planned and approved retail/commercial space does not include 962,000 sq.ft. of space associated with development applications requiring OPA and ZBA. If this space is approved, the unallocated demand would be 3,530,000 sq.ft.

Demand Allocation and Commercial Structure

In order to accommodate existing and future retail/commercial demand, there is a need to create new locations for all types of commercial space.

The demand for additional commercial space will be required across several commercial types and the allocation of this space functionally and locationally will determine the future commercial structure of Brampton. There is an opportunity for new retail and commercial development in Brampton for all types of shopping facilities ranging from convenience and local serving to regional serving, fashion, and comparison shopping retailing, to destination shopping, big box retail and power centre formats. Centralized and mixed use areas should also be provided with a focus on commercial intensification within existing commercial areas, in particular, the Central Area.

In order to accommodate existing and future retail/commercial demand, there is a need to create new locations for local serving and regionally oriented commercial space, in particular, in Brampton's growth areas to the northeast and west.

Neighbourhood and Convenience commercial centres are directly related to the growth and spatial distribution of future population. These two types of commercial are intended to serve the routine commercial needs of community populations. The Regional and District centres are required to serve higher order needs and less frequent shopping needs of residents from many neighbourhood areas of the city and beyond.

The commercial space could take the form of:

- Two regional scaled shopping centres anchored by department stores and possibly a supermarket, possibly one in northeast Brampton area and one in the west Brampton area. These centres may take on a non-enclosed format and may even take on elements of mixed use centres.

- District shopping centres anchored by a department store and/or large format supermarket. Possibly 2-3 additional district shopping centres in each the northeast and west areas of Brampton (total of 4-6 additional District Retail centres).

- Several neighbourhood shopping centres anchored a supermarket.

- Convenience plazas.

- Commercial corridor areas.

- Mixed use commercial/residential areas.

- Limited commercial space to provide for Business Industrial and Industrial areas.

The following table provides a recommended allocation of retail/commercial space demand by type or category, typical anchor, and size range. This allocation is intended to guide general directions of growth in Brampton and future policy formulation. The table allocates additional retail/commercial space demand in Brampton to 2031 which is not accounted for by additional retail/commercial space associated with existing planned and designated developments.

Recommended Allocation of Additional Retail/Commercial Space Demand to 2031

Category/ Type	# of Centres	Size Range per Centre	Primary Anchor(s)	Secondary Anchor(s)	Total Demand Allocation (sq.ft.)
Regional Retail	2	500,000-1,000,000+	One or more Department Stores	Supermarket	1,000,000-2,000,000
District Retail	4 to 6	100,000-500,000	Department Store	Supermarket	400,000-3,000,000
Neighbourhood Retail	5 to 8	50,000-100,000	Supermarket	*NA*	250,000-800,000
Convenience Retail	*NA*	up to 50,000	*NA*	*NA*	300,000-500,000
Central Area	*NA*	*NA*	*NA*	*NA*	100,000-200,000
Commercial Corridor	*NA*	*NA*	*NA*	*NA*	500,000-1,500,000
Business Industrial and Industrial	*NA*	*NA*	*NA*	*NA*	300,000-400,000
Total					**4,500,000-5,000,000**

Recommended Strategy for Policy Formulation

Based on the evolution of the existing commercial policy, emerging development trends, and the requirements of the future, it is appropriate to consider policy adjustments that will guide future decisions. New or renewed policies will require a process of careful consideration and drafting. However, the following approach for policy formulation is recommended:

1. Clarify and refine the existing commercial hierarchy.

In general, the existing hierarchy that is identified in the OP is still appropriate. However, the OP policies do not provide sufficient salient differentiation.

- The concept of regional centres should be broadened with greater emphasis on the size and number of anchors since these are the strategic elements that define market areas, as well as commercial role and function.

- There needs to be much greater emphasis on urban design and function. This does not mean pseudo, non-functional design that is at odds with the realities of development, retailing, and consumer expectations.

- District and neighbourhood centres should be more clearly defined by their department store and/or supermarket anchors and overlapping sizes should reflect current practice.

- A commercial corridor designation should be established to replace Highway Commercial. Commercial Corridor areas would generally focus on commercial land uses that are not the anchors for regional, district, or neighbourhood centres. This could include automotive, selected retail, entertainment, accommodation, and restaurant uses. Commercial Corridor, as determined through Secondary Plans, could be a stand alone designation along arterial roads or a transition between other commercial designations and non-commercial land uses, particularly residential.

- Convenience and other smaller scale commercial definitions need to be updated.

The following table summarizes a recommended commercial hierarchy of designations and the description of function and major retail uses for each element of the hierarchy.

Recommended Official Plan Hierarchy of Retail Designations and Description

Recommended Brampton OP Designation	Recommended General Size Range (sq.ft.) Specified in OP	Description of Function and Major Retail Uses Permitted	Comment
Regional Retail	> 500,000 sq.ft. GLA	• Serving a population of 100,000+ • To provide a wide range of goods and services to local residents as well as consumers from outside Brampton • Permitted uses include all types of retail stores, one or two full-line or discount department stores, supermarkets, pharmacies, restaurants, offices, retail warehousing, entertainment facilities and service establishments.	Recognize in OP and Land Use schedule
District Retail	100,000-500,000 sq.ft. GLA	• A concentration of retail establishments serving 50,000-80,000 people • Typically anchored by a large format supermarket, and/or major or discount department store.	Recognize in OP and Land Use schedule
Neighbourhood Retail	50,000-100,000 sq.ft. GLA	• A concentration of retail establishments serving 20,000-50,000 people • Typically anchored by a supermarket	Recognize in OP Establish locations through Secondary Plans
Convenience Retail	< 50,000 sq.ft. GLA	• One or more establishments planned and developed as a unit to serve day to day needs of 5,000-10,000 people	Recognize in OP Establish locations through Secondary Plans
Central Area	N/A	• A mixed-use area intended to accommodate the fullest range and concentration of commercial, service, cultural, entertainment, and civic uses and compatible residential uses.	Recognize in OP Establish locations through Secondary Plans
Commercial Corridor	N/A	• Automotive oriented • Could be a stand alone area, or a transition between other retail designations and non-commercial land uses particularly residential • Selected retail warehousing and retail uses but exclude supermarkets and department stores • Entertainment, hotels, motels, and restaurant uses.	Recognize in OP Establish locations through Secondary Plans
Mixed Use	N/A	• Mix of commercial and residential development in compact urban form. • Multi-purpose • Retail, service, community, institutional, cultural, recreational and residential uses.	Recognize in OP Establish locations through Secondary Plans

Recommended Industrial Designations and Description

Brampton Secondary Plan Designation	Recommended General Size Range (sq.ft.) Specified in OP	Description of Function and Major Retail Uses Permitted	Comment
Business Industrial	N/A	• Selected retail warehousing and retail uses but exclude supermarkets and department stores. • Some permission for entertainment, hotels, motels, and restaurant uses.	Recognize in OP Establish locations through Secondary Plans in Highway Commercial designations
Industrial	N/A	• Ancillary and limited retail and business serving uses. • Exclude supermarket and department store uses.	Recognize in OP Establish locations through Secondary Plans

2. Give greater emphasis to place making.

The OP expresses this intent and the goals have been reflected by recent Secondary Planning initiatives. However, this needs to be strengthened.

- Place more emphasis on mixed use.

- Make strong locations stronger rather than trying to make weaker locations not weak.

- Brampton needs to build on its move to making large scale commercial development more urban. For future development this means transit supportive locations that are central to and more closely integrated with surrounding communities, with more mixed use, and more urban in design and configuration.

- High standards of urban design should be a component of all commercial projects, site plans and Secondary Plans. Consideration should be given to establishing a private/public initiative to seek a practical set of commercial area design guidelines.

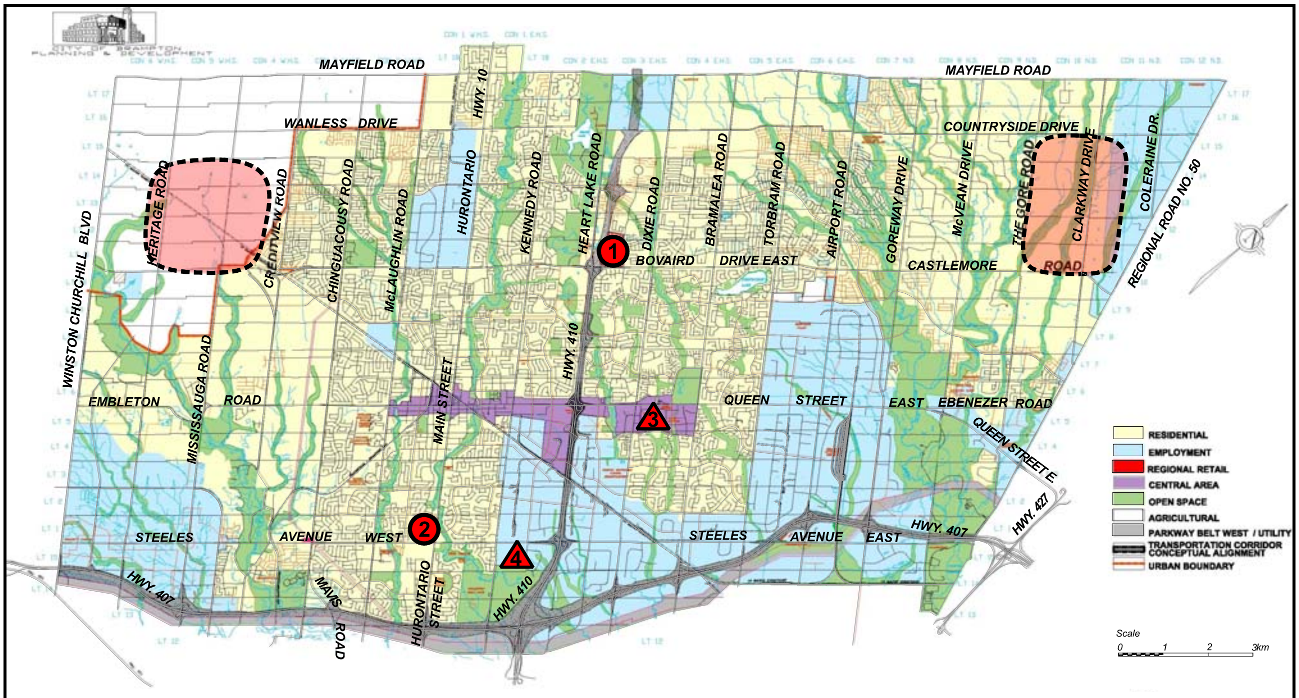
3. The general locations for future Regional and District Retail should be identified in the new Official Plan.

These large centres are strategic structural elements within Brampton's urban fabric. They are few in number but they affect numerous other land use planning, transportation, and growth management decisions.

- The text of the OP should identify the role, function, scale, defining retail uses, location criteria, and urban design objectives for all retail designations.

- The general locations for new Regional Retail centres and new District Retail centres should be identified in the new Official Plan.

- The following maps illustrate existing and recommended potential regional and district retail locations in Brampton. The potential retail locations shown are general in nature and not intended to specify a specific site.



Existing Regional Retail/Commercial
Regional Function
General Area for Potential Location of Regional Retail

Existing Regional Retail/Commercial

1. **Trinity Common - 900,200 sq.ft.**
   Home Depot - 130,000 sq.ft.
   Zellers - 118,600 sq.ft.
   Canadian Tire - 100,000 sq.ft.
   A&P - 55,100 sq.ft.

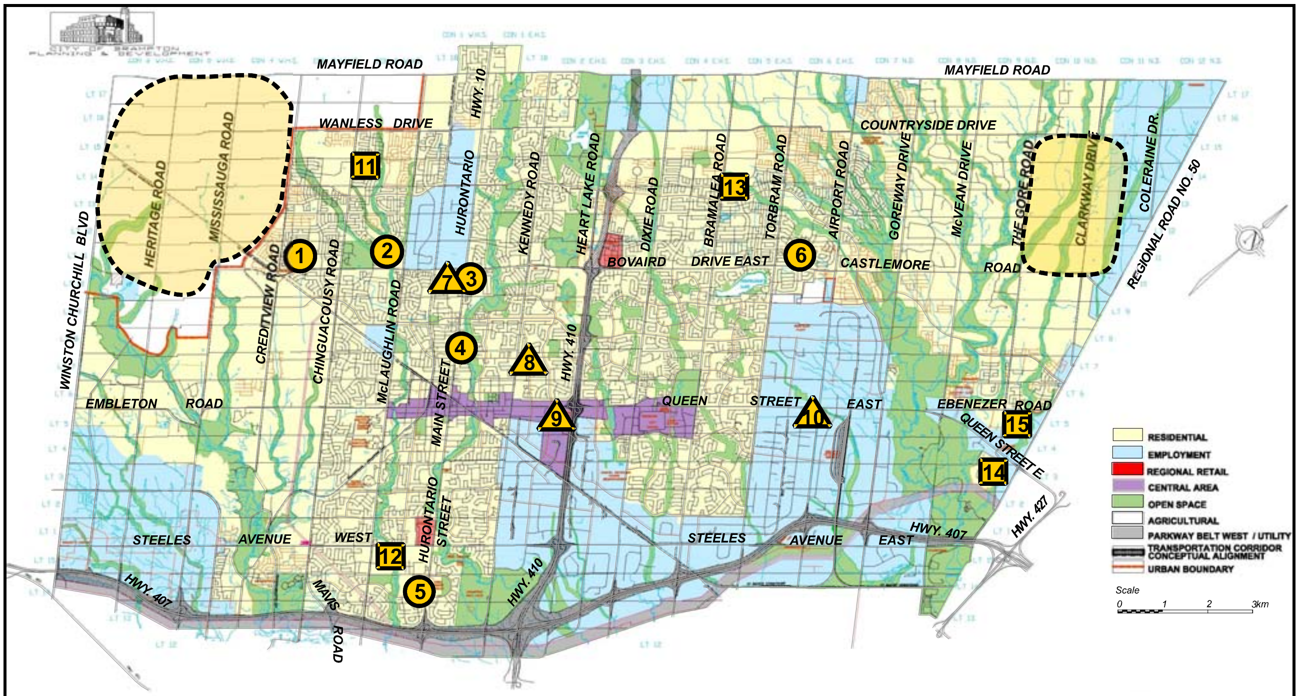
2. **Shoppers World Brampton - 797,200 sq.ft.**
   The Bay - 138,000 sq.ft.
   Zellers - 115,700 sq.ft.
   Canadian Tire - 80,300 sq.ft.
   Staples - 26,600 sq.ft.
   Price Chopper - 42,200 sq.ft.

Regional Function

3. **Bramalea City Centre - 1,115,700 sq.ft.**
   (Central Area Designation)
   The Bay - 131,800 sq.ft.
   Sears - 157,200 sq.ft.
   Zellers - 120,800 sq.ft.
   A&P - 63,600 sq.ft.
   Price Chopper - 26,000 sq.ft.

4. **Orion Gate - 591,600 sq.ft.**
   (Mixed Commercial - Light Industrial Designation)
   Home Depot - 131,000 sq.ft.
   Costco - 117,000 sq.ft.

City of Brampton Existing and Potential Regional Retail Locations



Existing District Retail or District Commercial
District Function
Planned and Approved District Retail
General Area for Potential Location of District Retail

Existing District Retail/Commercial

1 **Fletcher's Meadow - 210,800 sq.ft.**
Fortinos - 120,000 sq.ft.

2 **McLaughlin Corners - 115,700 sq.ft.**
A&P - 50,500 sq.ft.

3 **Brampton Corners - 287,800 sq.ft.**
(Yellow Brick plaza)
Wal-Mart - 160,000 sq.ft.
Fortinos - 69,900 sq.ft.

4 **Kingspoint Plaza - 144,300 sq.ft.**
A&P - 39,000 sq.ft.

5 **City South Plaza - 189,800 sq.ft.**
The Bay Furniture - 65,000 sq.ft.
Longos Fruit Market - 46,000 sq.ft.

6 **Springdale Square - 115,000 sq.ft.**
Fortinos - 60,100 sq.ft.

District Function

7 **Rona Home & Garden Centre - 179,400 sq.ft.**
(Highway Commercial Designation)
Rona (formerly Building Box) - 98,800 sq.ft.

8 **Centennial Mall - 170,700 sq.ft.**
(Neighbourhood Commercial Designation)
Zellers - 84,200 sq.ft.
Food Basics - 28,900 sq.ft.

9 **Bramrose Square - 238,400 sq.ft.**
(Central Area Designation)
Sears Outlet Store - 79,300 sq.ft.
No Frills - 59,800 sq.ft.

10 **Hwy 7 & Airport Road - 462,200 sq.ft.**
(Highway and Service Commercial Designation)
Wal-Mart - 131,800 sq.ft.
Rona - 132,000 sq.ft.
Canadian Tire - 95,200 sq.ft.

Planned and Designated District Retail

11 Sandalwood Parkway & Chinguacousy Road (NE)

12 Hurontario Street & Steeles Avenue (SW)

13 Sandalwood Parkway & Bramalea Road (NE)

14 Highway 50 & Highway 7 (SW)

15 Highway 50 & Ebenezer (SW)

City of Brampton Existing, Planned, and Potential District Retail Locations

- The locations for Neighbourhood Retail, Convenience Retail, Commercial Corridor, Mixed Use, and retail within Business Industrial and Industrial should be identified through a Secondary Plan process that recognizes their roles and which responds to the particular land use planning and transportation characteristics of each new Secondary Plan Area.

4. Renewal and intensification in the Central Area.

The OP needs to more explicitly recognize the maturity of the Central Area and the opportunity to intensify and diversify its land uses.

The Central Area is too spread out to evolve into a tightly integrated pedestrian precinct. However, there is an opportunity to create localized focal points that emphasize integration, intensification, and multi-functionality.

The implementing policies for the Central Area need to be finer grained that emphasize urban design, density, flexibility, and innovation with the goal to create a dense, diverse, mixed use linear corridor anchored by the historic downtown core and a major regional shopping centre (Bramalea City Centre).

The Central Area policies should continue to promote a mixed use area with important associations with civic functions, office development, higher density residential, and cultural and other entertainment activities although recognize commercial trends.

The commercial planning objectives for the Central Area should encourage:
- emphasis on visual improvements;
- more retail commercial and less industrial commercial;
- reduction in entrance ways;
- more public and private investment in landscape and streetscape improvements; and,
- evolution to more higher order and specialized retail.

5. Limit commercial within industrial designations.

Some retailers have evolved to large and powerful formats that have sufficient critical mass to create viable shopping locations within industrial areas. However, these locations do not necessarily enhance the overall community fabric and often represent a lost opportunity for place making.

While some larger format, specialized retail and retail warehousing is suitable for industrial sites, Brampton's future commercial policy should establish the conditions whereby non-industrial locations offer more competitive venues for retail development.

It is recommended that:

- With the exception of warehouse membership clubs, all large general merchandise establishments including department stores and home and auto supply stores, should be located in Regional Retail centres and District Retail centres, not in Industrial Areas or Business Parks.

- Supermarkets should be located in Regional Retail, District Retail, and Neighbourhood Retail centres, not in Industrial Areas or Business Parks.

- The retail function of Industrial Areas and Business Parks should focus on regional serving land extensive warehouse retail which would not ordinarily locate in Regional or District Retail centres, automotive, entertainment, and specialized retail and service commercial associated with employment land uses.

6. Designations in Secondary Plans should be consistent with the retail hierarchy.

There are over 20 different retail/commercial designations identified within Brampton's existing Secondary Plans.

- There is a need to consolidate the number of retail designations in order to provide consistency in all new Secondary Plans and to provide a flexible framework which recognizes commercial trends and accommodates future growth.

- The obvious approach is to ensure that retail land uses in future Secondary Plans are consistent with the functional retail topology that is articulated in the Official Plan.

Because retail areas are gathering places for people and a focus for activity, commerce, employment, and entertainment, their functional and spatial arrangement is a major determinant of the quality of Brampton's future urban fabric. The retail policies in the new Official Plan should maximize the level of retail service to residents. They should level the playing field and encourage competition among retailers and developers. They should enable viable and profitable enterprise. Finally, the retail policies should provide an important structuring element for creating a system of attractive, interesting, liveable, and sustainable communities in the City of Brampton.