

CITY OF BRAMPTON EMPLOYMENT LAND STRATEGY



Analysis and Strategic Directions
Discussion Paper for Public Review

HEMSON
Consulting Ltd.

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REPORT ADDENDUM: IMPLICATIONS OF CURRENT ECONOMIC CONDITIONS

This report has been prepared for the purposes of long-range planning. It is based on research conducted through 2008 and completed in November. The report is being released at the beginning of March of 2009 as part of a series of background reports on the City of Brampton's Growth Plan conformity process. While the report was being finalized in November 2008, the instability in the global financial system which had started in August 2007 intensified significantly. Then, as now, it was not clear for how long and how serious its effects on the broader economy would be. Accordingly, the report contains a number of references to an expected economic slowdown. While much remains uncertain about the economic situation, it has since become abundantly clear that Canada will experience a much more serious recession than the "slowdown" suggested in this report. What this means for Brampton, like the rest of the country, is that the next few years will present a wide range of economically-based challenges.

The subject of this report, however, is long-term planning for the City of Brampton. Whatever the duration of the current recession, Brampton still needs to plan for long-term growth and the ultimate development of the community. The policy directions recommended in this report — especially providing a significant inventory of employment lands for development over the long term — are designed to assure Brampton's readiness to accommodate economic expansion when it

resumes. Brampton will need to respond to short- and medium-term economic circumstances, but, while doing so, it is critical that the City not lose sight of the long-term economic development requirements of the community. In our view, the importance of key policy directions in this report for the City is unchanged notwithstanding the current economic situation.

EXECUTIVE SUMMARY

This report provides a review of the City of Brampton employment land supply and suggests a number of key policy directions to be considered as part of the City's official plan and conformity exercise with the 2006 Provincial *Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*). The report presents the findings of a "municipal comprehensive review" of employment land, which is required for future planning purposes in Brampton.

The key findings are as follows:

- The City of Brampton economy has been performing very well over the past 20 years. Employment has grown steadily and the industrial and commercial building markets have been strong. Of the City's total employment land supply of 4,300 net ha, approximately 2,900 net ha or two-thirds are developed.
- Employment in the City of Brampton is forecast to grow to 320,000 jobs in 2031, consistent with the community's strong past economic performance. Employment land will play a key role in accommodating this job growth, accounting for over half of the total employment growth to 2031.
- Major office employment is also forecast to grow rapidly to 2031, as the City of Brampton becomes a more mature and diverse urban community. The amount of major office employment is forecast to more than triple over the planning period.
- The City of Brampton is very well positioned to accommodate future employment growth, particularly to accommodate demand for employment land. In particular, the City's ability to provide large vacant development parcels is a major advantage.
- Analysis undertaken for this report indicates that at least the currently designated employment land supply is required to accommodate growth, and additional supply is required. Apart from the Northwest Brampton urban expansion area, there are few other options to provide significant additional supply.
- Even with the provision of additional employment lands in Northwest Brampton, the City may not be able to fully meet its future land need, mainly given the community's propensity to accommodate relatively low density, transportation-related uses such as warehousing and distribution.
- As a result, options to increase employment land density will also need to be considered, not only to achieve the City's economic objectives, but also to conform to the *Growth Plan*, which encourages municipalities to plan for higher densities and a more compact urban form, including employment uses.

As a result of these findings, the following key policy directions are suggested for public review:

1. Additional employment land should be designated in Northwest Brampton. It is suggested that Northwest Brampton should include between 400 and 800 net ha of employment land.
2. Given that a shortage of employment land will exist even under aggressive assumptions about future density, actions to encourage higher densities should be taken. Higher employment land densities should be encouraged through changes to land use policy addressing site design and landscaping. An economic development strategy should be developed to attract higher-intensity uses and employment intensification should be encouraged through investment in infrastructure and program and policy support.
3. Guidelines for community uses on employment land should be developed, particularly for Places of Worship. New guidelines are required to ensure that new community uses are compatible and well-planned, particularly with respect to parking and traffic.
4. And finally, the conversion of employment land to other, non-employment uses — including large format retail uses — should be resisted. Brampton, like most other communities in the Greater Toronto Area and Hamilton, is under strong pressure to convert employment land. In order to achieve the City's economic objectives, and conform to the *Growth Plan*, the following policy changes are suggested:
 - The City's official plan policies should unequivocally establish the role of employment land in Economic Development;
 - No employment land conversion should be allowed until such time as the next municipal comprehensive review. All of the locations where a conversion of employment land is considered appropriate are incorporated in the City's current official plan, including key sites within the Central Area and Urban Growth Centre;
 - No additional permissions for major retail uses should be provided in Employment Areas, although existing permissions that predate the *Growth Plan* should largely retain their development status;
 - Conversion policies in the secondary plans for major employment areas should be strengthened;
 - Guidelines for conversion should be included in the Urban Growth Centre, and the boundary of the Urban Growth Centre should be maintained in order to focus intensification and revitalization in this location over the planning period; and
 - Current applications to convert employment land should be refused, in addition to any future applications to convert employment land, or to permit "blended" commercial or residential permissions within the Employment Areas.

TABLE OF CONTENTS

EXECUTIVE SUMMARY i

I INTRODUCTION 1

A. Focus of this Study Is on Brampton’s Designated Employment Land Supply 1

B. A Strategy Is Required to Develop New Employment Land Policies 4

C. Method Incorporates a Variety of Sources and Analytical Approaches 7

D. This Discussion Paper Is Organized into Four Chapters 10

II LONG-TERM ECONOMIC OUTLOOK FOR THE CITY OF BRAMPTON IS VERY POSITIVE 11

A. The City of Brampton Economy Has Been Performing Very Well 11

B. Forecast Is for Continued Employment Growth to 2031 17

C. Employment Land Will Play a Key Role in Accommodating Future Growth 22

D. Major Office Employment Is Also Forecast to Grow Significantly 30

III BRAMPTON IS VERY WELL-POSITIONED TO ACCOMMODATE FUTURE DEMAND FOR EMPLOYMENT LAND 35

A. The City of Brampton Has a Large and Competitive Supply of Employment Land 36

B. Traditional Industrial Activities Dominate the Occupied Employment Land 40

C. Ability to Provide Large Vacant Parcels Is a Major Competitive Advantage 46

D. At Least the Current Designated Supply of Employment Land Is Required 50

E. Options to Increase Employment Density Will Also Need to Be Considered 52

IV A NUMBER OF KEY POLICY DIRECTIONS ARE SUGGESTED TO MAXIMIZE THE DEVELOPMENT POTENTIAL OF BRAMPTON’S LAND AND BUILDING SUPPLY 57

A. Additional Employment Land Should Be Designated in Northwest Brampton 57

B. Actions to Encourage Higher Employment Land Densities Should Be Taken 63

C. Guidelines for Community Uses in Employment Area Are Required 65

D. Conversion of Employment Land Should Be Resisted 66

V CONCLUSIONS 75

I INTRODUCTION

Hemson Consulting Ltd. was retained by the City of Brampton in 2007 to undertake a number of studies related to planning for long-term growth in the community. The studies are required now in order to bring the City's planning documents into conformity with the *Provincial Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*).

The future of employment land is particularly important to the City of Brampton. Employment land will play a major role in accommodating economic growth and improving the balance between population and employment. Without a competitive supply of employment land, Brampton will have great difficulty competing for new investment and achieving its own economic goals as well as the Provincial vision for growth in the Greater Golden Horseshoe (GGH).

Careful planning for employment land in the City of Brampton is important because these are the areas where the majority of long-term employment growth will be accommodated and few opportunities remain to provide additional supply. The community will be moving towards a complete build-out of its greenfield lands over the planning period to 2031, with the result that there will be no future opportunity to correct imbalances between employment lands and residential lands. Accordingly, a comprehensive analysis of the supply and demand for employment land is required.

A. FOCUS OF THIS STUDY IS ON BRAMPTON'S DESIGNATED EMPLOYMENT LAND SUPPLY

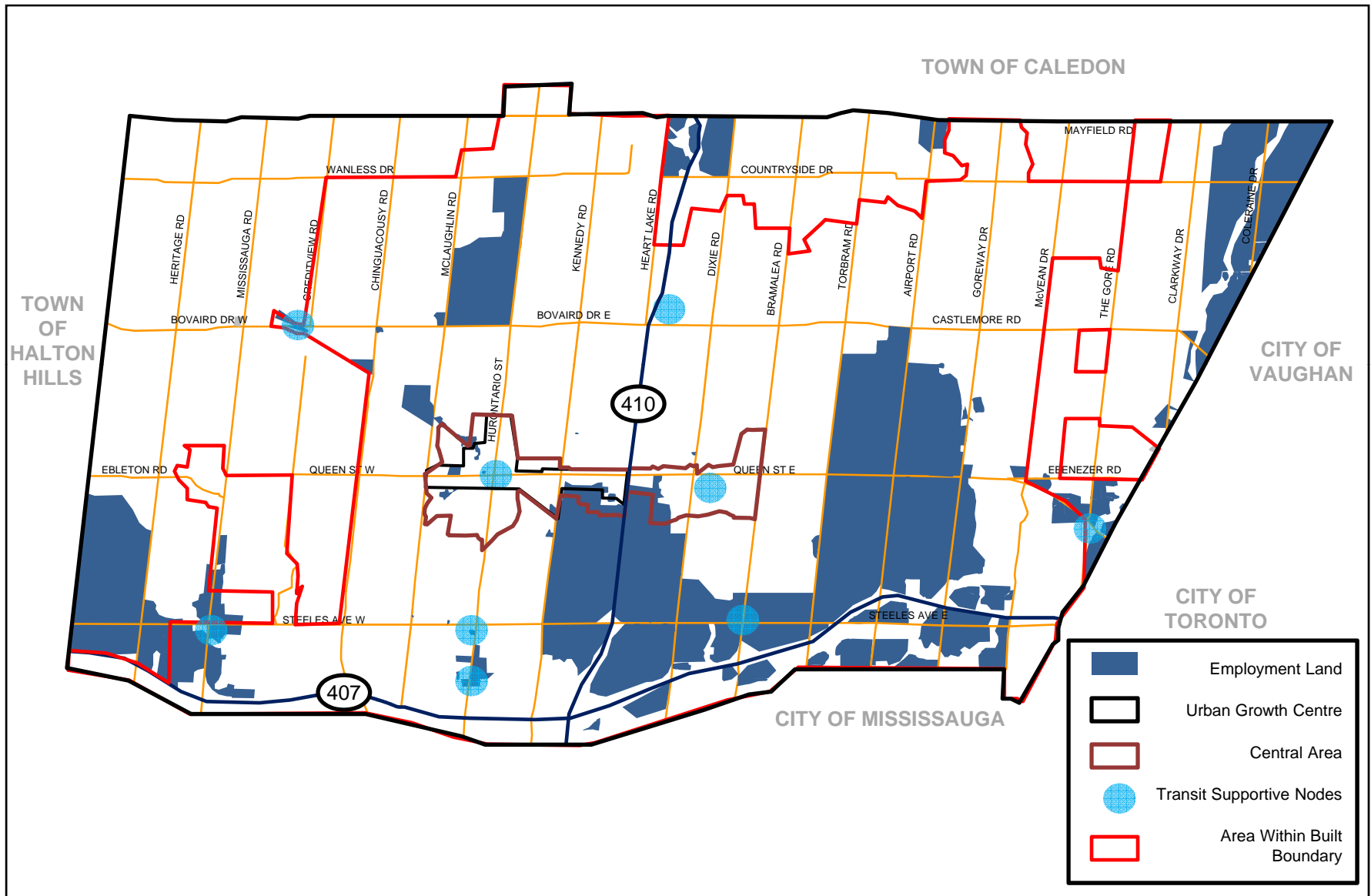
This study focusses on employment land in the City of Brampton, which consists of mainly low-rise, industrial-type building space. The analysis of employment land is based on a detailed inventory prepared by Brampton staff. Both the existing supply of employment land and future potential are considered, including the potential for employment land in Northwest Brampton.

1. What Is Employment Land?

Employment land was traditionally referred to as "industrial areas", but today accommodates a much wider range of economic uses, including: manufacturing and distribution; warehousing; research and development; commercial, institutional and accessory retail uses; and, increasingly, community facilities and Places of Worship. In the City of Brampton, Places of Worship have been permitted in some employment land locations through minor variances.

Notwithstanding the very wide range of economic uses accommodated on employment land, the majority are accommodated within large, land-extensive, low-rise, industrial-type buildings in employment areas strongly oriented towards the transportation network, in particular major highways and arterial roads. Brampton's employment land supply is illustrated on the following page.

MAP 1: CITY OF BRAMPTON CITY STRUCTURE AND EMPLOYMENT AREAS



Source: Hemson Consulting Ltd. based upon City of Brampton's Official Plan & Places to Grow, *Built Boundary for the Growth Plan for the Greater Golden Horseshoe, 2006*, Ministry of Public Infrastructure Renewal.

In some cases, major office development is accommodated on employment land.¹ However, for the purposes of this report major offices are treated as a separate category of employment although some may nevertheless be located on employment land. Major offices develop at very high densities, under a unique market dynamic and are concentrated in only a small number of locations.

Likewise, large-format retail development is also not considered part of employment land for long-range planning purposes. The focus of the analysis in the Employment Land Strategy is on the typically single-story, industrial-type development that occupies the vast majority of employment land and business park environments.

2. Employment Land Supply Includes the Designated Employment Areas and Other Industrial Sites

The Brampton employment land inventory was prepared by City planning staff and integrates a number of data sources, including: February 2008 parcel fabric data; building coverage data from April 2006 air photos; December 2007 business survey data; and information provided by the Municipal Property Assessment Corporation (MPAC).

¹For employment forecasting and most land-use planning purposes, major offices are traditionally defined as freestanding office buildings greater than 20,000 net sq. ft. in size. The Growth Plan uses the same expression — major office — for a different purpose. In the Growth Plan, major office policies address the desire to locate office buildings of 10,000 m² or greater in transit-oriented locations to encourage greater transit use. Except where otherwise noted, this report's definition of major office is 20,000 sq.ft. or more.

The employment land inventory is a parcel-by-parcel listing of the City's land supply and provides a range of information, including: occupied and vacant areas, land use designations and zoning, employment and building information, servicing and others. For the purposes of this study, the employment land supply is defined as follows:

- Lands designated for either *Industrial*, *Business Corridor* or *Office* use in the land use schedule (Schedule A) to the *City of Brampton Official Plan (2006)* and identified as being within the *Employment Precincts* shown in the City's urban structure (Schedule 1: City Concept);
- Lands in the Vales North special policy area²; and
- Also included in the supply are a small number of other sites that are outside of the Employment Precincts yet designated for employment uses in various Secondary Plans throughout Brampton.

For convenience, these areas are referred to collectively as the City's "designated Employment Areas" throughout the report. The combination of detailed land supply and employment information allows for an in-depth analysis of the profile of employment land in Brampton, including employment land density, built form and official plan designations. The information has been reviewed and standardized by Hemson Consulting Ltd., with input from the City's planning and economic development staff.

²The Vales North area is included in the employment land supply based on the preferred land use concept recommended in the Vales North Special Study Area Land Use Study, January 2008.

3. Analysis Also Takes into Account the Employment Land Potential in Northwest Brampton

In 2002, Hemson Consulting Ltd. undertook an analysis of long-range growth and land need in the City of Brampton, and recommended, among other matters, the designation of between 400 and 500 net ha of employment land in the Northwest Brampton urban expansion area. Since the lands contained in Northwest Brampton are approved for urban development by the City of Brampton and the Region of Peel, but land uses have yet to be designated, the potential area of employment land is not included in the employment land inventory.

It is recognized that Northwest Brampton represents the City's last remaining urban expansion area, and that the potential for employment land in this area needs to be considered carefully in the City's new official plan. As a result, one of the most important tasks in this discussion paper is an updated employment land needs analysis for Northwest Brampton, including the amount of land that is available and should be designated to accommodate future growth in employment.¹

¹*Northwest Brampton is an area bounded generally by Mayfield Road to the north, the Credit River to the south, Winston Churchill Boulevard to the west, and portions of McLaughlin, Creditview, and Mississauga Roads to the east. This area is now the Mount Pleasant, Mount Pleasant West and Huttonville North secondary plan areas. For details on the previous work see Northwest Urban Boundary Review: Employment and Residential Land Demand Forecast, prepared by Hemson Consulting Ltd.*

B. A STRATEGY IS REQUIRED TO DEVELOP NEW EMPLOYMENT LAND POLICIES

The employment land strategy is being undertaken to assist the City of Brampton to develop new policies for employment land. New policies are required to address pressure for the conversion of employment land to non-employment uses and to meet *Growth Plan* conformity requirements with respect to the Brampton official plan, particularly objectives for the development of "complete communities".

1. New Policies Are Required to Address Pressure for Conversion

The City of Brampton, like most other communities in the Greater Toronto Area and Hamilton (GTAH), is under strong pressure to convert employment land to other urban uses, particularly more intensive residential uses and large-format retail uses. A list of the current conversion applications is provided in the Technical Appendices to this report.

The pressure for conversion is occurring for many reasons, including a constrained urban land supply, strong growth pressure and the price differential between employment and non-employment land. The potential for higher land values, more intense development and a quicker return on investment generates a strong incentive for private landowners to seek conversions of employment land to these other non-employment uses.

While not conversions, these same economic forces will create pressure for new residential designations from the development industry, particularly in the Northwest Brampton Urban Development Area, where the City is contemplating the designation of additional employment land. Northwest Brampton was the last area of the City to be included within the urban boundary and, with its designation, the long-term urban structure for the community will be fixed. The long-term need for employment land needs to be considered here as Brampton develops into a mature, complete community.

2. New Policies Are Also Required to Meet Provincial *Growth Plan* Conformity Requirements

The Province of Ontario has recently undertaken a number of planning policy and growth management initiatives affecting long-range planning, particularly the 2006 Provincial *Growth Plan*, the 2005 *Provincial Policy Statement* (PPS) and recent amendments to the *Planning Act*.

Of these initiatives, two are particularly relevant to planning in the City of Brampton, the *Growth Plan* and the PPS. Through these two documents, the Province is seeking to achieve a set of “good planning” principles, which include more compact urban form, a good balance of jobs and housing and the direction of growth to existing built-up areas to limit the need for additional greenfield designations over the period to 2031. All municipalities in the GGH, including the Region of Peel and City of Brampton, will need to conform to the *Growth Plan*.

3. The Principle of “Complete Communities” Is a Major Consideration

The good planning principles sought by the *Growth Plan* are embodied in the notion of “complete communities”, defined as communities that will be able to meet the daily needs of residents through convenient access via public transportation to a mix of economic activities, as well as local services, housing and community infrastructure.¹

As a key element of complete communities, the *Growth Plan* seeks to promote economic vitality by ensuring there is enough readily available land for future economic activities, that the broader economic region is in a sound position to adapt to new economic trends, and that employment activities are planned to support the Province’s growth management objectives. In particular:

- The *Growth Plan* directs municipalities to accommodate employment growth by “ensuring the availability of sufficient land for employment to accommodate forecasted growth to support the GGH’s economic competitiveness” (Section 2.2.1);

¹Defined on page 41 of the *Growth Plan* as communities that “...meet people’s needs for daily living throughout an entire lifetime by providing convenient access to an appropriate mix of jobs, local services, a full range of housing, and community infrastructure including affordable housing, schools, recreation and open space for their residents. Convenient access to public transportation and options for safe, non-motorized travel is also provided.”

- Under the *Growth Plan*, employment in the Region of Peel is forecast to grow to 870,000 jobs by 2031, which represents a significant amount of growth.
- The *Growth Plan* directs municipalities to provide an adequate supply of lands and locations to accommodate future employment growth and to promote economic development and competitiveness by planning for, protecting and preserving *Employment Areas* (Section 2.2.6)¹;
- The *Growth Plan* builds on the PPS, which states in Section 1.3.2 that conversions may only be permitted through a comprehensive review and where it has been demonstrated that the land is not required over the long term and there is a need for conversion; and

¹The term *Employment Area* is defined on page 42 of the *Growth Plan* as “areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities”.

- Strict criteria are also provided regarding the conversion of employment land to non-employment uses.² Under the *Growth Plan*, major retail uses are not considered employment uses for the purposes of employment land conversion. Although these uses generate jobs, for long-range planning purposes, under the *Growth Plan* they are excluded and planned for separately.

The *Growth Plan* and PPS policies are further reinforced by *Planning Act* amendments (known as “Bill 51”), which seek to strengthen a municipality’s ability to refuse applications to convert employment land by removing a private applicant’s ability to appeal such refusals to the Ontario Municipal Board. Taken together, these new Provincial policies seek to minimize the conversion of employment land to other uses, although it is recognized that some change may be appropriate in localized circumstances.³

The *Growth Plan* also provides more specific planning direction regarding the preferred location, form and desired use of employment lands:

²The conversion policies can be found in Section 2.2.6.5, which states that conversions of employment land may only be permitted through a municipal comprehensive review and where a series of tests is met.

³By setting out policies to determine where the conversion of employment land may be considered appropriate (Section 2.2.6.5) the *Growth Plan* recognizes that there may be some circumstances where conversion of employment land could be considered appropriate and good planning.

- Municipalities are encouraged to designate and preserve lands within settlement areas within the vicinity of major transportation infrastructure (Section 2.2.6.9) including the Lester B. Pearson International Airport (LBPIA);
- The *Growth Plan* requires that municipalities, in planning employment land, facilitate the development of transit-supportive, compact built form and minimizes surface parking (Section 2.2.6.10); and
- Under the *Growth Plan*, major office and institutional development should not be located on employment land, but rather in the Urban Growth Centres, major transit station areas or other areas with planned higher order transit service (Section 2.2.6).

Under the *Growth Plan*, a set of specific intensification and density targets must also be achieved. The Region of Peel, like all other single- and upper-tier municipalities in the GGH, is directed to:

- Plan for a density of 50 residents and jobs combined per ha in new greenfield areas; and
- Accommodate 40% of new residential units within the built boundary after 2015.

A higher density target — 200 jobs and people per ha — is to be achieved in Brampton’s Urban Growth Centre. These, and other local and regional planning objectives, are taken into account in considering the future of employment land in the City of Brampton.

To this end, this employment land strategy is required by the City to review their policies dealing with areas of employment, the retention and conversion of employment land and policy options to direct major office and institutional development to the Urban Growth Centre and other transit-oriented nodes and locations.

New policies are required to address the pressure for conversion and for new residential designations, and also to identify those areas where some change may be appropriate for sound local planning reasons. For the City of Brampton, the issue of what type of change, if any, may be appropriate is considered in the context of City and Regional planning objectives and also new Provincial policies seeking to promote economic vitality and diversity and the development of “complete communities”.

C. METHOD INCORPORATES A VARIETY OF SOURCES AND ANALYTICAL APPROACHES

This study presents the results of a “municipal comprehensive review” of employment land in the City of Brampton within the meaning of the PPS (2005) and the *Growth Plan*. The completion of a municipal comprehensive review is one of the new minimum requirements required for settlement area expansions or conversion of employment land to non-employment uses.

Accordingly, the method used for the study incorporates a variety of information sources and analytical approaches, including past work and reports, input from the development community and a set of interim employment forecasts prepared to test the *Growth Plan's* density and intensification targets.

1. Previous Work and Reports Related to Employment Land in Brampton Have Been Reviewed

In addition to the City's employment land inventory, current and past literature on employment land in the City of Brampton has been carefully considered. In order to ensure that the most up-to-date findings and conclusions were considered in the analysis, several key documents have been reviewed, including:

- Documents regarding the employment growth outlook, including: the *Development Outlook Report 2006*, Brampton Growth Management Program and the *Growth Outlook for the Greater Golden Horseshoe* , Hemson Consulting Ltd., 2005;
- Documents regarding employment land requirements, including: *Northwest Brampton Urban Boundary Review: Analysis of Land Use Options*, Hemson Consulting Ltd., 2005; *Northwest Urban Boundary Review: Employment and Residential Land Demand Forecast*, Hemson Consulting Ltd. and Dougan and Associates, 2002 and *Understanding Employment Land in the Region of Peel* , Hemson Consulting Ltd., 2005;
- Documents regarding key policy issues, including: *Bram West Community Design Study — Employment Allocation Analysis and Urban Design Guidelines* Brook McIlroy and Hemson Consulting Ltd., 2005; *Retail Policy Review Study*, Malone, Given, Parsons Ltd., 2005; and *City of Brampton: Issues Affecting the Manufacturing Sector*, Centre for Spatial Economics and Interkom Creative Marketing, September 2006;
- Documents prepared as part of the official plan review, including: *Official Plan Review Office Strategy Discussion Paper*, City of Brampton Planning, Design and Development Department; *Status Report, City of Brampton Official Plan 2006: Region of Peel Approval Process*, June 2007.

A complete listing of the documents reviewed as part of the Employment Land Strategy is provided in the Technical Appendix to this report. In addition to the literature review, the development community was also consulted, to bring an “on-the-ground” perspective to the study process.

2. Development Community Has Been Consulted

In February 2008, Hemson Consulting Ltd. and the City of Brampton held a roundtable session with the development community to gain insight into the employment land market from those dealing with new development. Participants included members of the development community, realtors and the real estate advisory community such as:

- The Orlando Corporation; Giffels and the Kaneff Group of Companies;
- Prudential ELFA Realty, Indusite Realty Corporation, Morguard Investments and First Industrial Realty Trust; and
- DTZ Barnicke and Avison Young.

Key issues affecting employment land in Brampton were discussed, including the land supply, market outlook, trends in built-form and related policy issues. One of the key concerns that was raised during the session was that the *Growth Plan* density target is too high.¹ According to the development community, a density of 50 jobs and people per ha is much higher than the current pattern, and the current trend is towards lower, not higher densities. The meeting notes from the February 2008 roundtable session are provided in the Technical Appendix.

3. Analysis Incorporates Preliminary Employment Forecasts Prepared for the City in May 2008

The employment forecast used for this discussion paper is the preliminary forecast prepared for the City of Brampton by Small Geographic Unit (SGU) in May 2008.

¹For details, see Development Industry Focus Group Session, Draft Summary Report, prepared by Lura Consulting Ltd., February 29, 2008.

The forecast includes an overall employment forecast as well as a forecast of employment by land use type — major office, employment land and population-related employment:

- The employment forecasts have been prepared using the models used to prepare the forecast allocations in Schedule 3 of the *Growth Plan* and within the context of the overall Regional employment totals shown in the *Growth Plan* for 2031;
- The forecasts have been updated from previous work for the City of Brampton and the Region of Peel by incorporating 2006 Census data at the GTAH, Region of Peel and City of Brampton levels; and
- The forecast period is from 2006 to 2031 based on 5-year increments, which is unlike the Provincial *Growth Plan* forecasts which are from 2001 to 2031 based on 10-year increments, though the end-point Regional total is the same.

The employment forecasts provided in this study are considered preliminary pending additional work currently being undertaken as part of Brampton's growth management strategy, including the following:

- Review of Built and Planned Densities;
- Intensification Inventory and Analysis;
- Natural Systems and Culture of Conservation Policy Review;
- Infrastructure Review; and
- Transit and Transportation Master Plan.

The outcome of these studies will need to be considered prior to finalizing the forecasts and making policy choices regarding the future of employment land in Brampton. The ultimate growth outlook for Brampton's employment as part of the *Growth Plan* conformity work and the official plan review will be determined collectively with the Region of Peel and the other local municipalities.

D. THIS DISCUSSION PAPER IS ORGANIZED INTO FOUR CHAPTERS

This discussion paper describes the result of our review of the supply and demand for employment land in the City of Brampton. It has been prepared to provide background on the issue of employment land in the City of Brampton and suggests a number of policy directions to be incorporated into the official plan. It is organized into four chapters.

- This introduction describes the purpose of the study, the main issues to be addressed and the overall structure of the report.
- The second chapter describes the City of Brampton's employment growth outlook, including the employment forecast and the number of jobs that will need to be accommodated on employment land.

- The third chapter reviews the supply of employment land that is currently designated to accommodate future employment growth, existing and future employment densities and the adequacy of the supply to accommodate future demand.
- Based on these conclusions, the final chapter suggests a number of key policy directions that might be considered as a means to achieve City, Regional and Provincial planning objectives.

The suggested policy directions in this discussion paper are considered to be preliminary, to be finalized only after appropriate public and agency consultation. More specific details are provided in the Technical Appendix, which is provided under separate cover and contains information on the land supply, employment densities and other information relevant to employment land in Brampton.

The City of Brampton is seeking comments and input from the public and other interested stakeholders, including the development community. It also bears repeating that the Employment Land Strategy is one of many studies being undertaken as part of the City's municipal comprehensive review. The final outcome of these studies will need to be considered before the City can make final policy choices regarding the future of employment land in the City of Brampton.

II LONG-TERM ECONOMIC OUTLOOK FOR THE CITY OF BRAMPTON IS VERY POSITIVE

This chapter discusses the employment growth forecast that is used as the basis for estimating long-range employment land requirements in the City of Brampton.

Total employment in the City of Brampton is forecast to grow to approximately 320,000 jobs in 2031, representing more than a doubling of the 2006 employment of approximately 156,000 jobs. This is a significant amount of employment growth, reflecting the strong economic outlook for the GTA, the structure of the economy and the City of Brampton's strategic location.

Employment land will play a major role in achieving this forecast. Over half of the City's future employment growth will be employment land employment and will be characterized by modern, high-value industrial development including warehousing and logistics activities. Major office is also forecast to grow rapidly, reflecting the City of Brampton's evolving role within the regional economy. The outlook for major offices has implications for employment land as well as the range of uses to be accommodated within the Brampton Central Area, including the downtown.

A. THE CITY OF BRAMPTON ECONOMY HAS BEEN PERFORMING VERY WELL

Historically, the City of Brampton's economy has performed very well. Employment has almost doubled over the last 20 years and the City's industrial and commercial building markets are healthy. Reflecting these conditions, Brampton has also had high levels of employment land absorption. However, despite the City's strong economic performance, Brampton still has a relatively low activity rate and is a net exporter of labour.

1. Employment in the City of Brampton Has Almost Doubled Over the Last 20 Years

As shown in Table 1 below, employment has grown strongly in City of Brampton over the past 20 years. Employment has nearly doubled, growing from approximately 80,000 jobs in 1986 to approximately 155,000 jobs in 2006. Even during the recession-dominated 1991 to 1996 period, employment in Brampton grew while in the GTA, overall, it grew only marginally, by approximately 30,000 jobs or only 0.2%. This is shown in Table 2 below. Brampton has consistently grown at rates much faster than the GTA as a whole.

Table 1			
City of Brampton Employment and Employment Growth, 1986 to 2006			
Year	Employment	Growth	Growth Rate
1986	80,000	—	—
1991	93,000	13,000	3.1%
1996	104,000	11,000	2.3%
2001	134,000	30,000	5.2%
2006	155,000	21,000	3.0%

Source: Statistics Canada, Census of Canada

Note: Employment is "place of work" employment, including the usual place of work and work at home components and no-fixed place of work employment.

Table 2			
GTAH Employment and Employment Growth 1986 to 2006 (000s)			
Year	Employment	Growth	Growth Rate
1986	2,280	—	—
1991	2,500	220	1.9%
1996	2,530	30	0.2%
2001	2,940	410	3.0%
2006	3,180	260	1.6%

Source: Statistics Canada, Census of Canada

Note: Employment is "place of work" employment, including the usual place of work and work at home components and no-fixed place of work employment.

2. Industrial and Commercial Building Markets Are Healthy

The level of new, non-residential construction in the City of Brampton indicates enormous growth in the City's building stock. As shown in Table 3, Brampton averaged over \$290 million of industrial and commercial construction combined, per year, from the beginning of 2001 to mid-2008.

Table 3			
Value of Commercial-Industrial Building Permits 2001-2007 City of Brampton (\$ millions)			
Year	Industrial	Commercial	Total
2001	\$38	\$93	\$131
2002	\$66	\$96	\$162
2003	\$154	\$151	\$305
2004	\$110	\$257	\$367
2005	\$122	\$289	\$412
2006	\$76	\$210	\$217
2007	\$161	\$217	\$378
2008 (1 st half)	\$90	\$65	\$155
Average 2001 to mid-2008	\$109	\$184	\$293

Source: Statistics Canada Building Permit Data

As a percentage of total construction in the Toronto CMA, Brampton's industrial construction has averaged 15% of total industrial construction and 9% of commercial construction from 2001 to 2008.

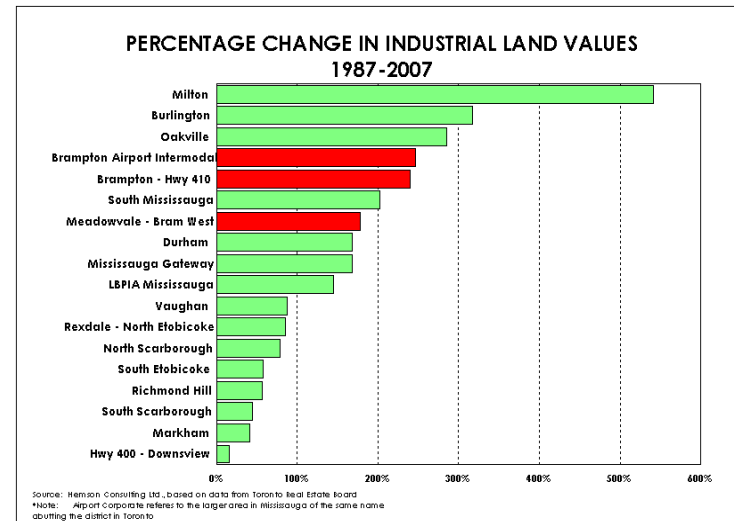
The strength of the industrial and commercial building market in recent years indicates continued strong economic growth from a building space perspective in Brampton, which, by comparison, only represents about 8.5% of the CMA population. Finally, a healthy short-term indicator for Brampton from these data is the strength of the industrial permits in the first half of 2008, given that Ontario's manufacturing output peaked in the 1st quarter of 2007 and was down 4.0% to the 1st quarter of 2008.

Another positive indicator for Brampton — and the rest of the GTA — is the relatively low rates of industrial building vacancy. As shown in Table 4, the industrial vacancy rate in Brampton is low compared to other communities in the GTA, indicating a relatively balanced and healthy industrial market where there is enough available space to encourage competition between landlords, but not so high that the vacancy rate would actively discourage new building construction.

A similar picture is painted by changes in land values. As shown in the graph following, the value of industrial land has risen sharply in the GTA over the past 20 years, particularly in the western areas. While the highest rates of increase were observed in Halton, the major markets in Brampton still have a very rapid rate of growth relative all of the rest of the GTA. These price changes in part indicate high demand and a high desirability for lands in Brampton. As point of comparison, general inflation over this period has been about 63%; only the last five areas shown on the graph have seen increases below this rate.

Brampton	4.7%
Oakville	3.9%
Toronto	5.0%
Vaughan	5.6%
Whitby	6.2%
Richmond Hill	6.4%
Mississauga	6.6%
Milton	6.7%
Markham	6.8%
Burlington	10.2%
GTAH	5.7%

Source: Cushman, Wakefield, LePage, Greater Toronto Industrial Report, Second Quarter 2008.



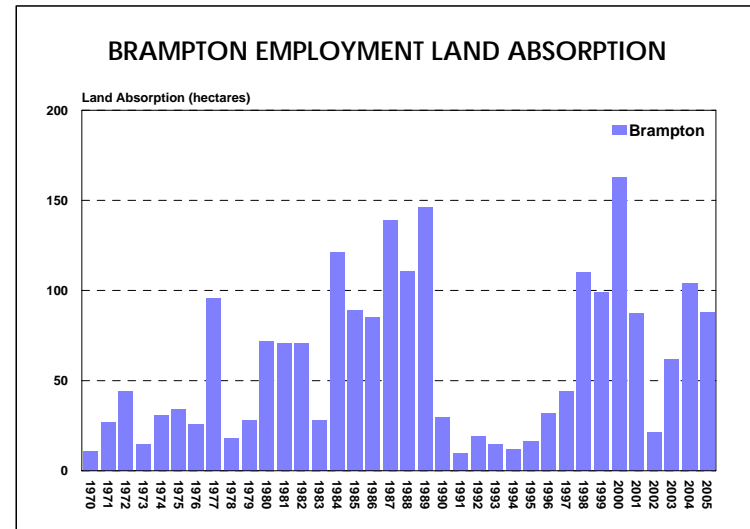
3. City of Brampton Has Had High Levels of Employment Land Absorption

The combination of strong employment growth and strong non-residential building construction has led to the development of a significant amount of the land supply in the City of Brampton. Like most communities in the GTA, employment land absorption in Brampton has fluctuated with economic trends in Southern Ontario:

- Brampton's employment land absorption in 2005 was estimated to be 90 ha, which was approximately 30% of the overall absorption in the GTA (310 ha).
- From 1995 to 2005 Brampton averaged 75 ha of employment land absorption per year.
- Since 1997, Brampton has averaged over 20% of the GTA's total employment land absorption, which is a strong showing by any measure.

The pattern of employment land absorption in the City of Brampton is shown on the graph over. Notwithstanding a slowing economy, according to the City of Brampton staff, there continue to be a number of active applications for development on employment land, which will result in additional employment growth, building space construction and employment land absorption.¹

¹A listing of current development applications is provided in the Technical Appendix.



Source: Hemson Consulting Ltd., Employment Land Database

4. Efforts Need to be Made, However, to Improve the Balance Between Population and Employment

Despite the City of Brampton's strong economic performance in recent years, Brampton's activity rate remains low and the community is a net-exporter of labour. The activity rate is the ratio of employment to population within a municipality, and standard measure of the population–employment balance in a community.

Typically, a balanced community where there are about the same number of jobs in the community as there are residents who have jobs, would have an activity rate in the range of 50% to 55%. The activity rate in the City of Brampton, however, is only 36%.

As shown in Tables 5 and 6 over, Brampton's activity rate of 36% is lower than in neighbouring communities — save for the still largely rural Town of Caledon — as well as the single-tier municipalities within the GTA. This pattern is the result of a number of factors, including:

- The relatively late arrival of Highway 407 in the City's transportation network;
- The success of the Cities of Mississauga and Vaughan in attracting employment, particularly to the areas around the Lester B. Pearson International Airport (LBPIA) and the CN Concord Rail Yards;
- Serviced, accessible employment land not being available in Brampton relative to these competing communities; and
- Brampton's very rapid population growth, which has had the effect of reducing the activity rate, despite the very strong performance of Brampton's economy.

An activity rate of under 40% is considered to be a relatively low ratio of employment to population, often referred to as the "live-work" balance. Considering Brampton's size and location within the central GTA, opportunities to improve the City's live-work balance should be an important long-range planning consideration.

City of Brampton	36%
City of Mississauga	64%
Town of Caledon	36%
Town of Milton	64%
City of Vaughan	51%

Source: Hemson Consulting based on Statistics Canada, Census of Canada

City of Brampton	36%
City of Toronto	59%
Region of Peel	51%
Region of York	51%
Region of Durham	39%
Region of Halton	49%
City of Hamilton	44%
GTA Overall	53%

Source: Hemson Consulting based on Statistics Canada, Census of Canada

Brampton's live-work balance is also reflected in commuting patterns, which show that the City is a net exporter of labour.¹ Improving the live-work balance and reducing the level of out-commuting is desirable for many reasons:

- Providing more job opportunities for local residents promotes the development of complete communities in the language of the *Growth Plan*;
- Providing an opportunity to reduce the need for long-distance commuting makes more efficient two-way use of the transportation system; and
- Developing a more diverse financial base for municipalities to improve the mix of residential and non-residential property assessment. A greater diversity in the land and assessment base tends to provide greater flexibility in responding to unanticipated changes in the community or market.

¹*Brampton's total resident employed labour force is approximately 225,000 whereas the total place of work employment is less at 155,000 jobs. The difference, approximately 70,000 jobs, is the net number of Brampton's residents that commute daily to employment opportunities outside of the community. The primary destination of out-commuters from Brampton are the Cities of Mississauga, Vaughan and Toronto, all of which are large net importers of labour.*

Reflecting these benefits, the City of Brampton's policies as well as those of the *Growth Plan* indicate that major efforts will need to be made to achieve a better balance between population and employment in the City as it moves towards a full build-out of the community. As a result, providing opportunities to achieve a better balance of employment and the resident labour force must therefore be a key planning challenge for the City of Brampton.

The City of Brampton economy has been performing very well. Employment has grown, non-residential building markets have been healthy and high levels of employment land absorption have occurred. A key consideration in the planning for future employment growth, however, will be the need to create more jobs to achieve a better balance between the number of jobs in the community and the resident employed labour force.

As discussed in the next section, employment in the City of Brampton is forecast to grow steadily to 2031, reflecting continued economic growth in the broader economic region and Provincial and City policy objectives to improve the live-work balance, provide more opportunities for the City of Brampton's residents to work within the community and reduce levels of long-distance commuting.

B. FORECAST IS FOR CONTINUED EMPLOYMENT GROWTH TO 2031

The employment forecast for Brampton is the interim forecast prepared for the City in May 2008, and has been prepared within the context of the overall economic outlook for the GTAH, and the *Growth Plan*, which provides an employment allocation of 870,000 jobs to the Region of Peel in 2031, growing from 600,000 jobs in 2006.¹

The employment forecast has been prepared with a view to setting an employment target that would improve the City's activity rate and live-work balance and meet key *Growth Plan* requirements, including objectives for the development of more complete communities.

Notwithstanding that employment growth fell somewhat short of expectations during the 2001 to 2006 Census period, the fundamentals are in place for continued, long-term growth. Within the context of continued economic growth in Canada, Ontario and the GGH and strong policy directions to achieve a better live-work balance, employment in the City of Brampton is forecast to grow to approximately 320,000 jobs by 2031.

¹For details, see The Growth Outlook for the Greater Golden Horseshoe, Hemson Consulting Ltd, January 2005.

1. Current Economic Slowdown Is Part of the Normal Business Cycle

One of the most interesting features of the 2006 Census is the pattern of employment growth that is shown during the 2001 to 2006 period:

- Overall, employment in the GTAH grew by only 8.4% over the five years, compared to a forecast of 11.7%, which was lower than expected².
- And for the City of Brampton, while employment from 2001 to 2006 grew by a quite healthy 15.7%, this was also lower than expected.
- Contrary to some suggestions, increasing Development Charges in the large fast-growing municipalities has not caused lower-than-expected growth. The differential in development charges between locations in relation to the overall cost of development and doing business is extremely small.
- The relationship between development charges rates and development activity tends to be the opposite, whereby locations with high rates tend to demonstrate higher levels of building activity. For example, the Cities of Toronto and Hamilton exempt industrial development from such charges and neither has accommodated significant development as a result.

²The Monthly Labour Force Survey reported growth of 10.6% in the same time period, which is somewhat closer to what the forecast expectations had been.

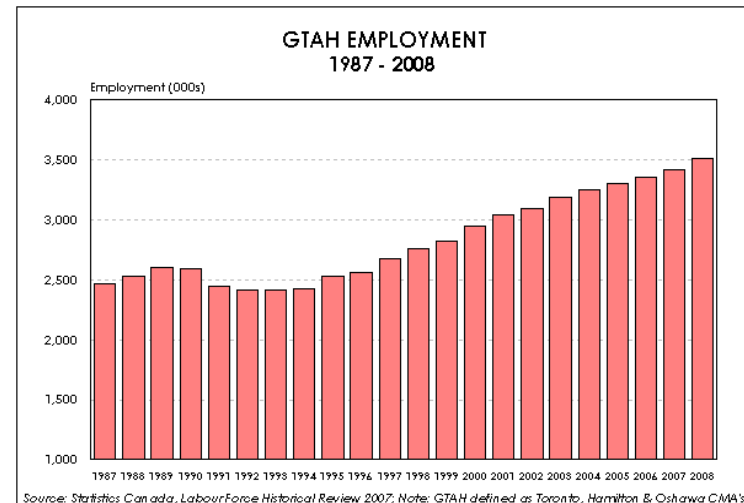
- The lower-than-expected growth in the City of Brampton is the result of a larger, metropolitan-wide pattern where all of the large fast-growing communities at the edges of the GTA fell short of growth expectations and the slower-growing communities met or exceeded expectations.
- Within the GTAH, the Cities of Toronto and Hamilton and the Region of Durham all met or exceeded expectations. Within the Outer Ring, the Counties and regions such as Simcoe, Waterloo, Wellington and Brant also met or exceeded growth expectations.

More recent data is now indicating why this pattern occurred: less employment growth than expected has taken place on employment lands, and somewhat more has taken place in other locations in activities such as retail, health, education and public administration. There was, however, a significant increase in building space, suggesting a decline in employment densities which would explain the geographical distribution of growth.

However, while industrial-type activities had little net growth in the GTAH between 2001 and 2006, there was a significant increase in building space. The combination of little employment growth and the addition of new space indicates a decline in employment density in employment areas. This decline in employment density largely explains the geographical distribution of growth.

2. Long-Term Growth Forecasts Incorporate the Cyclical Nature of the Economy

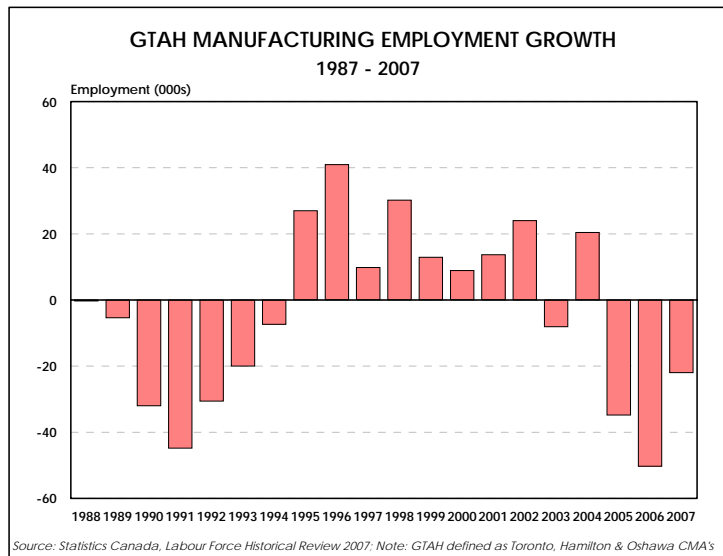
Notwithstanding the pattern of employment growth during the 2001 to 2006 period, on annualized basis, the pattern of sustained employment growth in the GTAH is clear. As shown in the graph below, since the end of the recession of the early and mid-1990s, employment has grown rapidly and steadily in the GTAH.



Within this pattern of sustained employment growth, however, some important changes in the composition of employment are worth noting. The manufacturing sector, in particular, continues to restructure in response to shifting competitive environments.

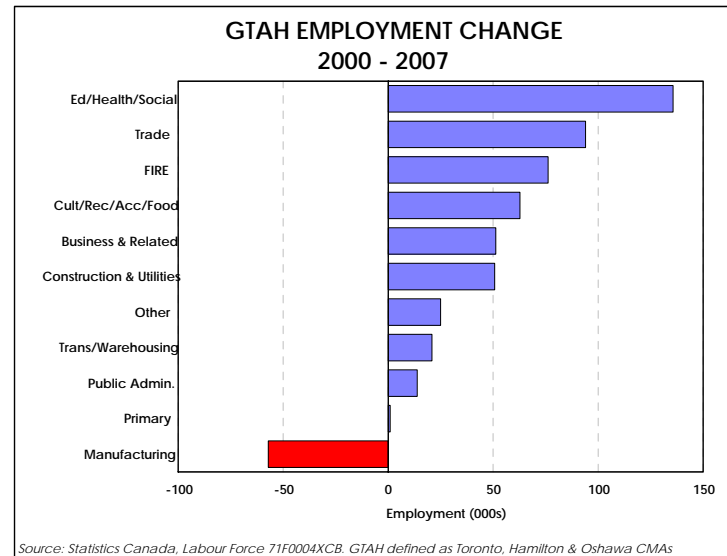
As shown in the graph below, following a period of strong gains from the mid-1990s to the early 2000s, manufacturing employment has declined in recent years. The decline in manufacturing employment has been the result of many factors, including:

- High energy and materials costs;
- The high value of the Canadian dollar; and
- Strong competition from foreign markets, particularly China and India.

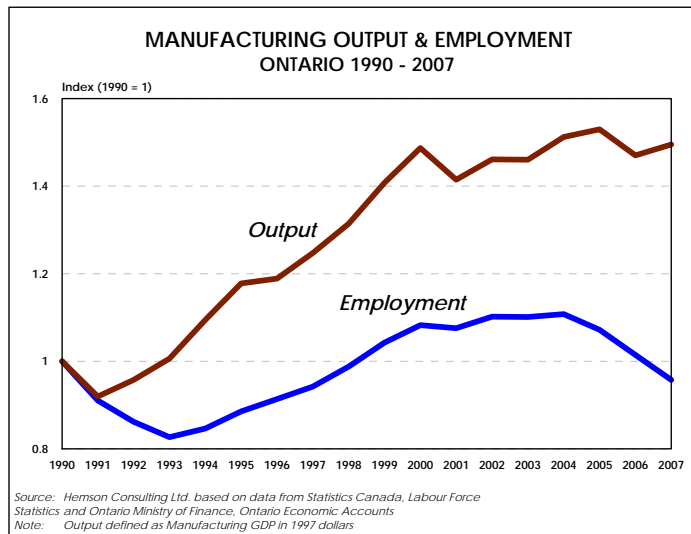


However, although some job losses in the GTAH have been occurring as a result of restructuring in the manufacturing sector, these jobs have been replaced with gains in employment in other economic sectors, particularly education, health and social services, trade and professional and business services.

As shown in the graph below, employment in the GTAH has continued to grow despite some significant challenges to the manufacturing sector. This is a further indication of the strength and diversity of the GTAH economy and its ability to replace job losses, when they occur, with other economic activities.



And, as shown in the graph below, the rate of manufacturing output has increased substantially since the early 1990s, though has stabilized in the current decade. The stable output of recent years has been achieved with fewer employees — increases in output per employee are increases in economic productivity.



There is no question that the current economic slowdown in the United States and Canada will yield declines in both manufacturing output and manufacturing employment. And, in turn, the economic slowdown is likely to have some short-term effects on the non-residential and real estate sectors in the GTA. The slowdown is also likely to have indirect effects through the financial markets, as nervous buyers and investors become more cautious.

However, there are some key differences between Toronto and some other American cities, mostly related to the housing market.¹ The GTA is anticipated to remain the primary economic engine in Ontario. Economic output is anticipated to continue to grow over the long-term, accompanied by associated growth in employment and income.

3. Brampton's Total Employment Is Forecast to Grow to 320,000 Jobs by 2031

The employment forecast for the City of Brampton is prepared within the context of the economic outlook for the GTA in the Provincial *Growth Plan*. Within this context, employment in the City of Brampton is forecast to grow to approximately 320,000 jobs in 2031.

The forecast is consistent with the *Growth Plan* target for the Region of Peel by 2031, including a consideration of the growth outlook for the City of Mississauga and Town of Caledon. The model is “top down”, in that it incorporates the allocations shown in the Schedule 3 of the Provincial *Growth Plan*. The model also incorporates “bottom-up” factors, including land supply, and the policy goal to improve the live-work balance, servicing and local and regional planning expectations. The Brampton employment forecast is summarized in Table 7 below.

¹Housing in the Toronto CMA is still more affordable than it was relative to the late 1980s real estate boom and to other housing markets in the United States, such as San Francisco and Chicago.

	Employment	Employment Growth	Growth Rate
1986	80,000	—	—
1991	93,000	13,000	3.1%
1996	104,000	11,000	2.3%
2001	134,000	30,000	5.2%
2006	155,000	21,000	3.0%
2011	203,000	48,000	5.6%
2016	239,000	36,000	3.3%
2021	274,000	35,000	2.8%
2026	295,000	21,000	1.5%
2031	320,000	25,000	1.6%
Change 2006– 2031	—	165,000	2.9%

Source: Hemson Consulting Ltd.

Note: Employment is “place of work” employment, including the usual place of work and work at home components and no-fixed place of work employment.

Under the above forecast, Brampton would increase its share of Regional employment from today’s 26% share to 37% of Peel employment in 2031 by accommodating well over half of the Region’s growth over the next 25 years. Preliminary work in the other municipalities indicates that this forecast is consistent with the other communities, while meeting the Region’s *Growth Plan* target for 2031.

4. Activity Rate Is Forecast to Increase from 36% in 2006 to 42% in 2031

Under the interim employment forecast shown in Table 7, Table 8 shows that Brampton’s activity rate will rise to 42% from the current rate of 36%, which may not be considered significant considering that municipalities such as the Cities of Vaughan and Mississauga are forecast to maintain activity rates in excess of 50% to 2031. Nevertheless, the employment forecast is considered a reasonable and achievable target for improving the live–work balance and reducing the current level of out-commuting.

	Employment	Population	Activity Rate
2001	134,000	325,000	41%
2006	155,000	433,000	36%
2011	203,000	512,000	40%
2021	274,000	632,000	43%
2031	320,000	726,000	44%

Source: Hemson Consulting Ltd.

As discussed in the next section, employment land will play a key role in accommodating the forecast employment growth and achieving the goal of improving the activity rate and Brampton’s live–work balance.

C. EMPLOYMENT LAND WILL PLAY A KEY ROLE IN ACCOMMODATING FUTURE GROWTH

The approach used by Hemson Consulting Ltd. to forecasting employment growth is based on the three standard land use-based categories—major office, population-related and employment land employment. The categories and their main characteristics are summarized below.

- **Major Office Employment** is employment contained within free-standing buildings over 20,000 net sq.ft. in size. This is in accordance with standard employment forecast category definitions in the *Growth Outlook for the Greater Golden Horseshoe* and distinct from the term major office as used for a different policy purpose in the *Growth Plan*.
- **Population-Related Employment** is employment that exists in response to a resident population that is primarily not located in employment areas or major office jobs. This category includes retail, education, health care, local government and work at home employment.
- **Employment Land Employment** is jobs accommodated in primarily low-rise industrial-type building space and multiples, the vast majority of which are located within business parks and industrial areas.

It is primarily for employment land employment where there is the most competition with other communities, and where land use planning and local economic development policy can have the strongest influence on the amount of employment that is accommodated:

- Population-related employment is driven by growth in population and is accommodated within existing neighbourhoods and commercial areas and through the normal course of secondary planning for most new residential communities.
- Major office employment occurs at much higher densities and under a unique market dynamic and the land supply is considered to be unlimited. As a result of its very high density and “footloose” nature, the location of major office development is driven mainly by market forces.

In the City of Brampton, employment land employment is forecast to account for more than half of the total employment growth over the 2006 to 2031 period. This reflects the role that employment land currently plays in accommodating economic development and the type of development anticipated in the future.

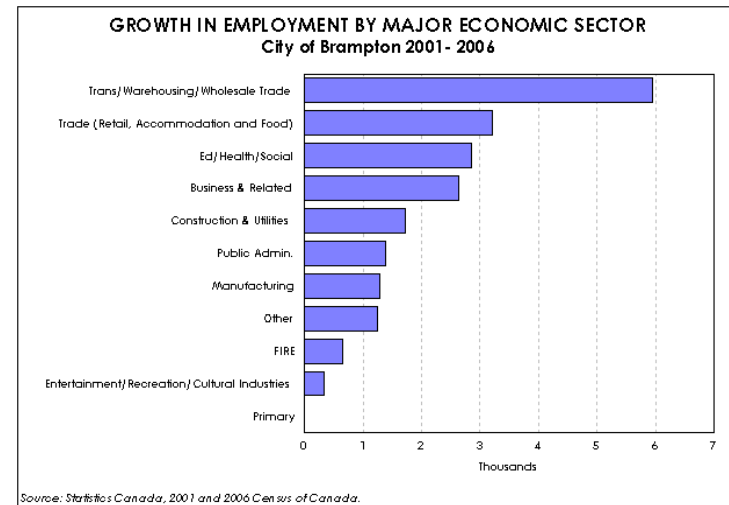
1. City of Brampton Economy Is Highly Oriented Towards Industrial Activities

Before turning to the forecast and the land use-based categories of employment used for planning purposes, it is important to understand the City’s economic base from an economic sector perspective.

According to the 2006 Census, the largest category of employment in the City of Brampton is manufacturing. Other traditional industrial sectors such as transportation and warehousing are also significant. Collectively, these industrial-oriented sectors account for almost 45% of the City’s employment base. This is illustrated in the graph below.



The industrial orientation of City of Brampton economy is also apparent from the pattern of employment growth by economic sector during the 2001 to 2006 Census period, which is shown below.



A number of key observations are worth noting:

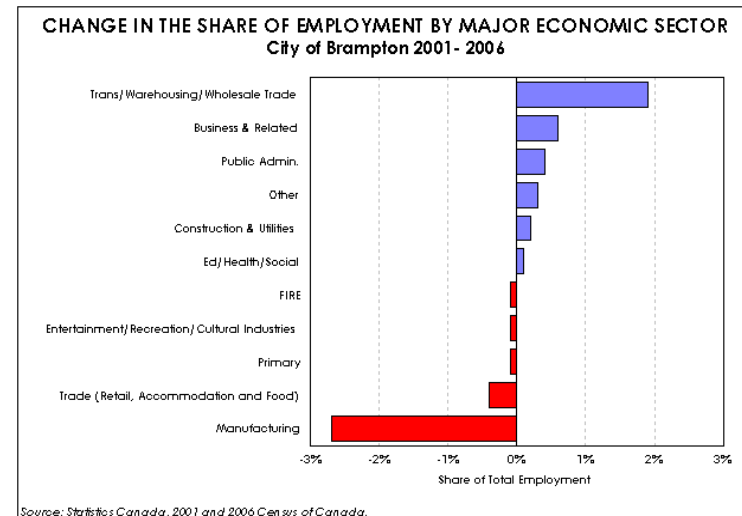
- Growth has occurred across all sectors of the Brampton economy; however, the top gainers are clearly traditional industrial sectors.
- Employment growth in the transportation, warehousing, and wholesale trade sectors have been particularly significant. Collectively, these sectors have added over 6,000 jobs or 30% of the City of Brampton’s employment growth in the 2001 to 2006 period.

- This is somewhat different than the pattern of growth in the GTAH overall, where employment gains were focussed more in service-oriented sectors. While the service sector in Brampton has growth over the period, it has not grown to the same extent as other communities because of Brampton's propensity for traditional industrial activities.
- To this end, the City of Brampton also accommodated a slight increase of 1,000 jobs in the manufacturing sector, which is of note given that manufacturing employment in the GTAH actually declined slightly by about 1% or 6,000 jobs during this period.
- Patterns in the Labour Force Survey data for the GTA indicate that between 2001 and 2006 manufacturing employment peaked at nearly 7% above the 2001 level in 2004, before declining in 2005 and 2006, indicating that the 2006 Census happened to catch the employment level on the down cycle at the same count as in the up cycle in the previous period; and
- Moderate employment growth has occurred in the professional, managerial and institutional sectors, consistent with the evolving nature of the City of Brampton as a growing and maturing community that is becoming more of a central place.

The primarily industrial character of the City's economy has remained well-defined over the 2001 to 2006 period. As shown in the figure over, most of the changes in the shares of employment by sector over the 2001 and 2006 period were marginal — for the most part less than 1%.

However, within this overall pattern of sectoral stability, there are two key trends worth noting:

- First, manufacturing's share of total employment has declined; and
- Second, this decline appears to have been compensated by a rise in the share of employment in transportation, warehousing and wholesale trade sector.



This pattern is the result of many factors, including changes in the nature of work, increased productivity and a range of other factors commonly attributed to the rise of the “new economy”, or the “creative” or “talent” economy.

Although some changes have occurred in the composition of employment, this has not been sufficient to change the overall orientation of the City of Brampton economy or the role of employment land in accommodating economic development. Employment land continues to play a major role in accommodating economic activity.

2. Employment Land Accommodates a Significant Component of Brampton's Economic Base

In describing the role employment land plays in economic development, there is an important distinction between *type* and *geography*. By *type*, employment land employment is jobs accommodated in primarily low-rise, industrial-type building space and multiples. By *geography*, employment on employment land includes primarily industrial-type development, but also population-related employment and in some cases major offices that lie within industrial areas.

- By type, employment land employment accounts for the largest share of employment: an estimated 79,500 jobs or 51% of the City's 2006 Census employment. This employment is accommodated primarily within the designated Employment Areas, but can also be found in other scattered locations.
- An estimated 9,200 jobs, or 6% of the employment, are major office jobs. This employment is accommodated within the designated Employment Areas as well as other locations, particularly central Brampton and the downtown.

- The balance, approximately 66,200 jobs, are population-related in a variety of locations throughout the community, including residential neighbourhoods and the downtown, but also within employment areas, primarily as retail and institutional uses.

The estimated employment by type for the City of Brampton in 2006 is shown in Table 9 below.

Table 9		
City of Brampton Employment by Type, 2006		
Employment Type	Number of Jobs	Percentage
Major Office Employment	9,200	6%
Population-related employment	66,200	43%
Employment Land Employment	79,500	51%
Total	154,900	100.0%

Source: Hemson Consulting Ltd based on Statistics Canada, Census of Canada

This is similar to many other communities in the GTA/H that also accommodate a significant share of employment on employment land. As shown in Table 10 below, across the entire GTA/H area approximately 40% of the total employment is employment land employment. Excluding the central cities of Toronto and Hamilton, approximately 55% is employment land employment.

In the Region of Peel, approximately 56% of the total is employment land employment with approximately 15% in major offices. Of the Regional major office employment, approximately 65% is located in the employment areas, primarily in the City of Mississauga's Airport Corporate and Meadowvale Districts. The remainder is in the City centre and other locations, including Brampton.

Regional Municipality	Employment Land	Major Office	Population Related
City of Toronto	26%	37%	37%
Region of Peel	55%	15%	30%
Region of York	56%	13%	31%
Region of Durham	55%	3%	42%
Region of Halton	59%	9%	32%
City of Hamilton	50%	6%	44%
GTAH Total	41%	23%	35%
Total GTA Excluding Toronto And Hamilton	55%	10%	35%

Source: Hemson Consulting Ltd. based on 2001 and 2006 Census and Statistics Canada Labour Force Information

- As shown in Table 11, by geography, employment land in the City of Brampton accommodates a larger share of employment, approximately 97,300 jobs, or close to two-thirds of the City's total employment according to the City's Employer Census. The map shown on page 2 illustrates the designated Employment Areas.

Employment Area	Total Employment*
Airport Intermodal	39,400
Bram East	800
Bram West	4,700
Bramalea South Gateway	11,700
Central Area	4,500
Downtown North	600
Hurontario South	3,700
Highway 410	25,200
Highway 410 North	0
Highway 427	400
McLaughlin North	1,100
Northwest Sandalwood	5,300
Vales North	37
Other Scattered Sites	100
Total	97,300

Source: City of Brampton Economic Development Office Employer Census, 2007.

*Note: Employment for the downtown north and central area represents the jobs on scattered sites designated for employment use in the vicinity, not employment of the entire downtown area.

The City's Employer Census is voluntary and does not collect employment information the same way as Statistics Canada collects data for the Census. The survey does not include all employment in the City and excludes institutional uses. While the two sources are broadly comparable, one should be cautious not to undertake precise comparisons between the employment counts provided here and the Census-based employment counts provided in the previous chapter.

As shown in Table 11, the major employment areas around the LBIPA are the main concentrations of employment, including the areas in the vicinity of Highway 410, the areas around Airport Road and the CN Intermodal yard. Notwithstanding differences in the employment information from the Census and the City's Employer Census, a number of observations can be made:

- While containing most of the employment land employment in the City of Brampton, the *Employment Areas* also accommodate much of the major office employment and some of the City's population-related employment, including retail and institutional uses:
- Out of the total of 97,300 jobs, approximately 80,000 are industrial-type activities, or employment land employment, by type, as shown in Table 9;
- Of the City's total major office employment by type of an estimated 9,200 jobs, approximately two-thirds, or about 6,000 jobs, are accommodated on employment lands, which includes the Hurontario South office node. The remainder is accommodated in a range of other locations including downtown.
- The remainder, approximately 11,000 jobs, are population-related in nature, including retail activities and a range of quasi-industrial service-commercial activities that tend to locate within industrial-type buildings on employment land, such as: automotive-related uses; specialty material suppliers; equipment rentals; schools; professional and community associations; and Places of Worship.

3. More Than Half of Future Employment Growth Will Be Employment Land Employment

Measured either by type, or geography, it is clear that employment land has played a major role in accommodating employment in the City of Brampton in the past, and this relationship is anticipated to continue over the forecast period:

- Employment land employment is forecast to maintain its current share of employment, approximately 50% of the 2006 total as shown in Table 9. The result is a forecast growth of approximately 87,000 jobs or 53% of the total employment growth to 2031.
- Growth in population-related employment is forecast to slow somewhat through the planning period as a result of the build-out of the remaining supply of greenfield lands for ground-related housing. The result is a forecast growth of approximately 44,000 jobs or 27% of the total employment growth to 2031.
- Growth in major office employment is forecast to accelerate, based on the anticipation that the City of Brampton will become an increasingly attractive location for major office development within the Region of Peel and GTAH. The result is a forecast growth of approximately 33,000 jobs or 20% of the total employment growth to 2031.

The employment forecast by type is summarized in Table 12 on the following page.

Table 12				
Employment Forecast By Major Type City of Brampton, 2006 to 2031				
Employment Type	2006	2031	Growth	Share
Major Office	9,200	42,300	33,100	20%
Population-related	66,200	110,000	44,800	27%
Employment Land	79,500	166,700	87,200	53%
Total	154,900	320,000	165,100	100%

Source: Hemson Consulting Ltd.

Note: Totals may not add due to rounding.

It will be difficult for the City of Brampton to accommodate significantly more major office employment than is anticipated in the interim employment forecast. The GTA office market is highly competitive and existing office nodes have well-established roles in the regional market and an abundant capacity to accommodate development.

Likewise, the amount of population-related employment growth that is anticipated is also relatively fixed. Population-related employment growth is related to growth in population and typically occurs in existing locations, such as hospitals and universities, and on new commercial and institutional land allocated through the normal secondary planning process for new residential communities.

4. Most New Development Will be Large, Single-Storey Industrial Buildings

One of the major features of the evolution of industrial development in recent years in Canada and the United States has been the rise of logistics and supply chain management activities. This evolution has driven two significant changes in industrial building design, size and location:

- Buildings have become larger and more automated, with an increasing tendency to combine storage with other functions, such as office, manufacturing and distribution; and
- There is a growing integration of manufacturing, warehousing and distribution activities in new industrial facilities, as well as an increasing trend for firms to centralize both their goods-operations and their office space into a single industrial facility.¹

These trends, combined with the City's strong industrial orientation and locational advantages, suggest that future employment land development will be characterized mainly by large industrial facilities engaged in traditional industrial activities. Examples of the type of facilities that can be expected to develop on employment land in Brampton are shown on the following page.

¹For detail, see *Understanding Employment Land in the Region of Peel, Hemson Consulting Ltd., 2005*. It is also noted in this report that trends towards integrating offices and other uses within a single facility may actually be having the effect of reducing the need for traditional office concentrations.

Examples of New Facilities in Brampton and Peel Region



Loblaw Office Building
1 Presidents Choice Circle, Brampton
597,432 sq.ft



Industrial Building
1900 Clark Blvd, Brampton
35,200 sq.ft



Industrial Building
6300 Kennedy Rd, Brampton
45,958 sq.ft



Office / Industrial Building
Airport Rd & Mayfield Rd, Caledon
43,128 sq.ft



Office / Retail Building
1 Delta Park Blvd, Brampton
25,000 sq.ft



Industrial Building
165 Sun Pac Blvd, Brampton
59,035 sq.ft

While the prospects of mixed use may be desirable from a planning perspective, this only works with a small part of the employment land market. Most of the market is made up of “boxes” on large sites that generate significant amounts of truck traffic. Recognizing the importance of this type of economic activity, one of the key objectives of the new Metrolinx draft regional transportation plan is to improve goods movement within the GTA. ¹

Similarly, heavy or noxious industries are also not likely to be attracted to Brampton’s Employment Areas because of the high land prices and the potential for land use conflicts. More details on the type of employment growth that is anticipated is provided in the next chapter, including some of the implications of Brampton’s attractiveness for warehousing and logistics activities.

D. MAJOR OFFICE EMPLOYMENT IS ALSO FORECAST TO GROW SIGNIFICANTLY

Currently, the City of Brampton does not have a large office market. Major offices account for only 9,200 jobs, or approximately 6% of total employment. Brampton, unlike other GTA municipalities including Mississauga, Markham and Richmond Hill, has not attracted a high proportion of major office employment to date. This pattern, however, is forecast to change as Brampton’s population and employment base continue to expand.

¹For detail, see *The Big Move: Transforming Transportation in the Greater Toronto Area and Hamilton, Metrolinx, 2008.*

1. City of Brampton Does Not Currently Have a Large Office Market

The City of Brampton currently has a gross, leaseable major office space inventory of about 390,000 m².²

- Most of the City’s office inventory is located within the South Central area, which includes the City’s Central area and the Highway 410 Employment Area. The largest office building in Brampton is the new Loblaws headquarters in Bram West at about 55,000 m².
- There are 17 major office buildings in the City of Brampton Central Area, ranging in size up to approximately 14,000 m². The remainder of the inventory is accommodated largely in the South East area, which includes the Airport Intermodal Employment Area.³

²Hemson office database. The office database includes the Nortel Networks head office on Dixie Road at nearly 1 million sq. ft, or just over 90,000 m². In the past, it has been considered a combined office and industrial building. However, according to Brampton staff the facility is no longer being used by Rogers Communications and included as a pure office building.

³For detail, see the Official Plan Review Office Strategy Discussion Paper *City of Brampton Planning, Design and Development Staff June 2005.*

Overall, Brampton’s major office inventory is relatively small and the potential for significant new major office development in the short term is limited. Again, this is because the most competitive areas for major office development in the GTAH are relatively well-established and have abundant capacity to accommodate future development, including Toronto’s financial core and a small number of centres at the edges of some employment areas with superior transportation access.

2. Over the Forecast Period, However, Demand for Offices Is Forecast to Grow Significantly

The employment forecast for Brampton embodies an expectation that the City of Brampton will become a more “central place” over time, providing a wider range of community uses and services to local residents and business community, and to residents and businesses in communities to the north and west of Brampton:

- Over time, like the City of Mississauga, Brampton will begin to shift to a more mature, fully built-out urban community.
- As this occurs, the supply of land for lower-density housing and employment will be exhausted, and growth will need to be accommodated through more intensive forms, such as major offices. Continued growth and maturing of other established office concentrations will create additional opportunities.

Among other things, this trend suggests that the City of Brampton is likely to develop a much larger office market than exists today and provide broader metropolitan-wide economic functions. As a result, major office development is expected to be a significant part of future employment growth in the City. Major office employment in Brampton is forecast to more than triple — from an estimated 9,200 jobs in 2006 to over 30,000 jobs in 2031.

3. Future Demand Will Be Largely for Greenfield Sites with Good Highway Access

The location of future demand for major offices in Brampton is anticipated to be largely on employment land, particularly locations with superior transportation access. From a market perspective, the Bram West Employment Area will provide Brampton’s best near- to mid-term opportunity to establish a major office node as an extension of the prestigious Meadowvale Business Park in the City of Mississauga. The area is already anchored by the new Loblaws head office.

Over time, however, it is anticipated by Brampton staff that some major office development will take place through the redevelopment of sites within the Central Area and downtown.¹ The necessary transportation and transit infrastructure is either in place or planned to accommodate higher density growth.

¹For details, see the Official Plan Review Office Strategy Discussion Paper *City of Brampton, June 2005. Brampton’s official plan, consistent with the Growth Plan, seeks to concentrate offices in the Central Area.*

Other major office projects that are either planned or under construction in the community include:

- The 16,200 m² Region of Peel Headquarters and Police building at Queen Street East and Central Park Drive, which is under construction;
- The 11,100 m² Springdale Professional Building, at Bovaird and Sunny Meadow, which is also under construction;
- The proposed 6-storey medical building at Dixie Road north of Queen Street east; and
- The pending 9-storey office building at 60 Gillingham Street near Bovaird and Hurontario Streets.

Additional office space, although not contained within freestanding buildings greater than 20,000 net sq.ft. in size, is also being proposed or under construction in a number of mixed residential and commercial projects.¹

In the event that the Province does not plan to proceed with a hospital at the Peel Memorial Hospital site, there is the opportunity to accommodate a significant amount of major office space at this location. As the current owners, the Province of Ontario will be able to play a key role in achieving more intensive employment uses on this site, consistent with Provincial planning objectives for transit-oriented development in the Urban Growth Centres.

¹For detail, see City of Brampton: Office Development Projects, November 2007, *November 2007*.

4. A Key Planning Issue Will Be the Extent to Which Brampton Can Direct Major Offices

Under the *Growth Plan*, municipalities are encouraged to direct major office development to major transit stations and intensification corridors (Section 2.2.5) and away from designated Employment Areas (Section 2.2.6.4). Historically, however, land use planning has had a weak influence on the location of major offices:

- The experience in the GTAH has been that the location of major offices is driven primarily by market demand. Most major office development outside of the City of Toronto has occurred not in planned transit nodes, but rather in greenfield business parks with superior transportation access.
- Most of the major office space that has been built in the Region of Peel has been accommodated in greenfield business park locations in the City of Mississauga, primarily in the Airport Corporate Employment District and Meadowvale Business Park.
- And, despite the success of the City of Mississauga in attracting offices, few have actually been built in planned transit nodes or the City Centre. This is consistent with the experience of most other communities in the GTAH.²

²For details, see *The Growth Outlook for the Greater Golden Horseshoe*, Hemson Consulting Ltd., 2005, page 49.

The City of Brampton’s official plan currently anticipates major office development occurring in a number of locations, including:

- The Central Area;
- Four office centres located in the designated Bram West, Hurontario, Airport Corporate and Hurontario and Bramwest Employment Areas; and
- A series of transit-supportive nodes, where the City intends to direct higher-density forms of development including offices.

Office uses have also been proposed in the Mt. Pleasant Village Mobility Hub as part of a draft official plan amendment for the Fletchers Meadow Secondary Plan, recognizing the strategic importance of the Mount Pleasant GO Train Station as a multi-modal mobility hub. The following key points warrant attention:

- The Mt. Pleasant Village Mobility Hub is being designed as a transit-oriented community that will support high density mixed-use development, consistent with *Growth Plan* objectives for transit-oriented development and complete communities.
- The vision for the area is a community containing an intensive concentration of housing, employment, shopping and recreational uses supporting the inter-regional transit service provided by GO rail, anchored at the Mt. Pleasant GO station.

- The City of Brampton has requested that Metrolinx recognize the Mt. Pleasant Village Mobility Hub as a “Gateway Hub” as it is located at the interchange of two or more rapid transit lines (GO rail and AcceleRide BRT) and is being planned to achieve high densities in close proximity to the transit lines.
- The Mt. Pleasant Village Mobility Hub Block Plan is proposed to be planned to achieve an overall minimum density of 90 persons and jobs combined per ha with specific higher density targets to be applied to certain areas within the community, resulting in an estimated 1,100 jobs in office and other population-related employment uses.¹

However, while there may be many *opportunities* to provide for major office development in these locations, the potential supply of major office sites vastly exceeds any reasonable expectation of growth to 2031, including the potential in the Central Area, the office centres and the transit-supportive nodes, including the Mt. Pleasant Village.

As a result, one of the key challenges Brampton will face in achieving the *Growth Plan* intensification and employment objectives for the Urban Growth Centre is the extent to which the City of Brampton can direct major offices to this location within the community.

¹According to City of Brampton staff, the employment area proposed on the south side of the CNR rail to the east and west of the realigned Creditview Road is estimated to yield about 1,100 jobs.

As the City of Brampton matures and reaches full build-out, there will continue to be demand for major office development. There will also be growing pressure to change land use designation, particularly pressure to convert lands designated for office use to other forms of commercial activity, particularly retail. Policies will need to be developed to address this pressure, in the context of the City's overall employment land requirements.

Employment land will be critical to maintaining the City's competitiveness within the GTA economy, and helping to address the relatively low live-work relationship, reflected in the low activity rate and high out-commuting. More than half of the total job growth forecast for the City of Brampton will be accommodated on employment land, which is consistent with the share of employment by type forecast for the other 905 regions of the GTA overall.

Given that the City of Brampton will have difficulty attracting significantly more than the amount of major office and population-related employment that is anticipated in the interim forecasts, for employment to grow, employment land employment must grow. In turn, in order for employment land employment to grow, the City of Brampton must provide an appropriate supply of marketable employment land.

Under the *Growth Plan* and the PPS, municipalities are directed to plan for an appropriate supply of employment land to accommodate future employment growth and economic development. Accordingly, the next chapter turns to a discussion of the current supply of employment land in the City of Brampton and whether or not it is adequate to accommodate forecast growth.

III BRAMPTON IS VERY WELL-POSITIONED TO ACCOMMODATE FUTURE DEMAND FOR EMPLOYMENT LAND

This chapter discusses the adequacy of Brampton's employment land supply to accommodate the growth forecast, or demand for employment land, that was discussed in the previous chapter.

In discussing employment land, planning professionals often use different definitions and terminology. To be able to interpret and compare figures, the basis used for the measurement must be clear. Hemson Consulting Ltd. defines three categories of employment land:

- The **total land area** is the amount of land in all types of uses, developable or not. It includes uses such as hydro corridors, natural features and all other types of non-developable land areas. The total land area is of limited use for long-range planning because it does not provide an accurate measure of how much land could actually be developed for urban purposes.
- The **gross land area** is the amount of land that could be developed for urban purposes. It *excludes* such uses as hydro corridors, major natural features and other non-developable land.

There is no set relationship between the total and the gross land area. This is because the amount of natural features and other non-developable areas varies by geography.

- The **net land area** is the area of the actual buildings and the building lot. It excludes uses such as roads, storm water management ponds and other services, which is typically 20 % of the gross land area.

For large vacant unsubdivided parcels, the net area must be derived from the gross area to account for land that will be lost to uses such as roads and services through the subdivision process. This is referred to as the "gross-to-net" adjustment, typically 80%.¹ The gross-to-net adjustment is not, as it is often taken to be, the removal of natural features and other non-developable lands from the area of the parcels.

¹That is to say that the net area is typically 80% per cent of the gross area. In the City of Brampton's vacant employment land inventory a factor of 80% was applied to large vacant parcels defined as parcels greater than 6 gross ha. The adjustment was applied to large vacant parcels within the Bram West, Highway 410 North, and Highway 427 Employment Areas.

In this chapter, the analysis of supply is undertaken in terms of the net land area, unless indicated otherwise and compared to future demand.¹ The overall conclusion is that Brampton’s current supply of employment land is not sufficient to accommodate long-range demand:

- Brampton has a large and competitive employment land supply, virtually all of which is suitable and marketable for continued employment uses;
- The City’s ability to provide large, vacant development parcels is a major competitive advantage. Over the next 25 years the demand for employment land will be strong and the supply of employment land in competing communities diminishing; and
- To take advantage of these opportunities, at least the current amount of designated and planned employment land is required, including the planned employment land designation in Northwest Brampton.

¹The Provincial Growth Plan adopts a different definition of land area, which is similar to the Hemson definition of gross land, but includes some non-developable areas that would normally be excluded, such as hydro-electric corridors. Cases where a net density figure is restated to a Growth Plan definition of density — or vice versa — are clearly indicated.

A. THE CITY OF BRAMPTON HAS A LARGE AND COMPETITIVE SUPPLY OF EMPLOYMENT LAND

One of the main reasons for the City of Brampton’s strong economic performance is a large and competitive employment land supply. A wide range of economic activities is accommodated on employment land in Brampton, including major concentrations of traditional industrial activity. Virtually the entire supply of employment land is suitable and marketable for continued employment uses.

1. Brampton Has a Total Supply of Approximately 4,300 Net Ha of Employment Land

Currently, the City of Brampton has a total employment land supply of approximately 4,300 net ha, excluding lands occupied by major retail uses — approximately 100 net ha — but including the small amount of land occupied by major office.

Of this total supply, approximately 2,900 net ha, or two-thirds, are occupied. The remainder, 1,400 net ha, are vacant. Most of the City’s occupied employment land supply is accommodated in the large areas around the LBPIA, whereas most of the vacant supply is located near the edges of the community in new greenfield areas. The City’s employment land supply is summarized below in Table 13.

Table 13				
Summary Employment Land Supply City of Brampton, 2007				
Employment Area	Net Land Area (ha)			
	Total	Occupied	Vacant	Share Occ.
Airport Intermodal	1,520	1,320	200	87%
Bram East	110	30	80	32%
Bram West	530	115	420	22%
Bramalea-South Gateway	320	310	10	96%
Central Area	130	130	<1	100%
Downtown North	5	3	2	69%
Huronontario South	25	20	<1	98%
Highway 410	690	650	40	91%
Highway 410 N	90	10	80	7%
Highway 427	470	10	460	2%
McLaughlin North	35	30	2	95%
Northwest Sandalwood	280	210	70	75%
Vales North	20	10	10	43%
None (Scattered Sites)	55	30	20	52%
Total	4,280	2,880	1,390	67%

Note: Totals may not add due to rounding. Further details about the employment land supply are provided in the Technical Appendix.

Source: City of Brampton Employment Land Inventory

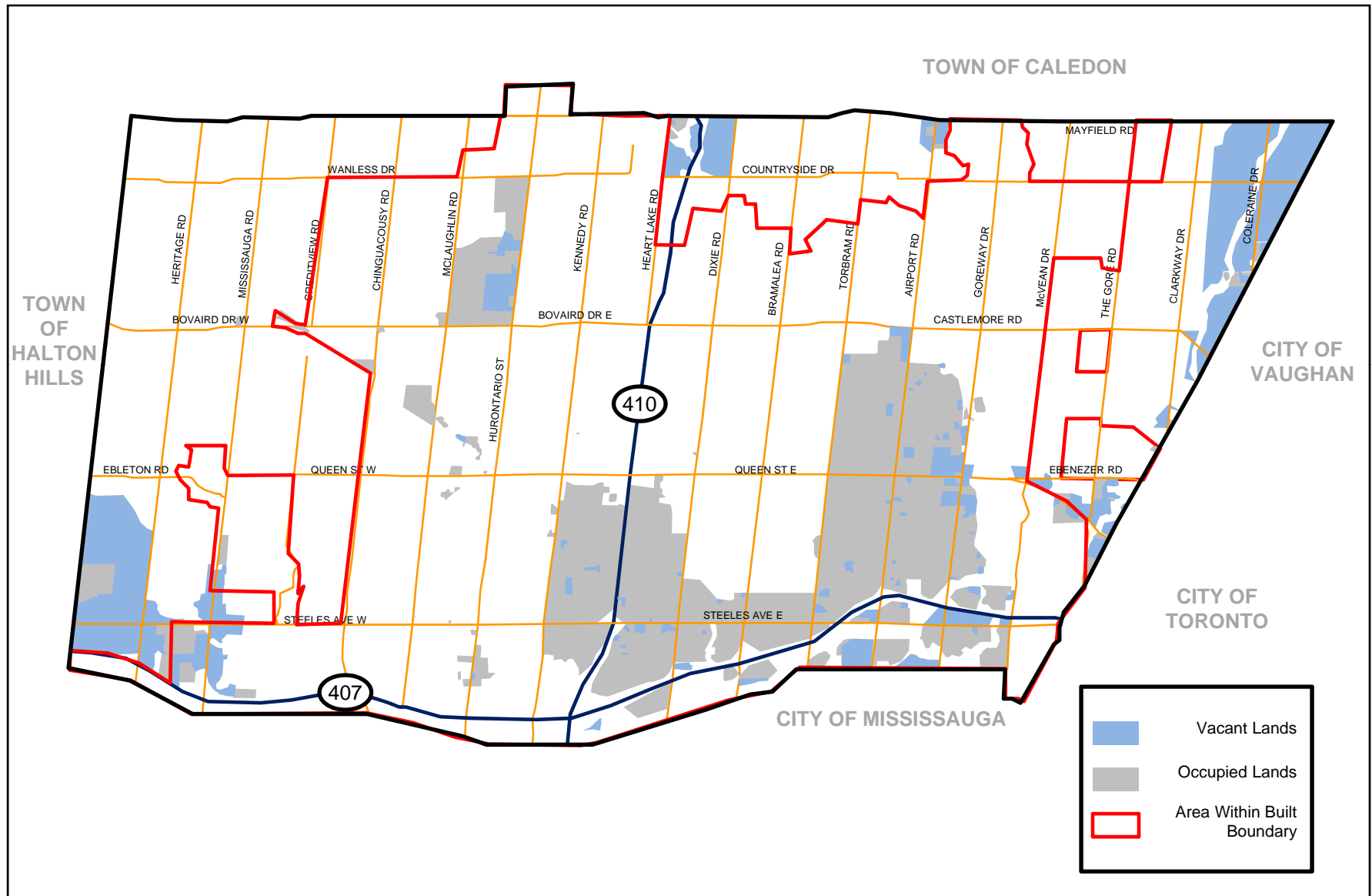
The employment land supply in the City of Brampton can be grouped into two broad categories — employment land that is within and employment land that is outside of the Built Boundary, as defined by the Province as part of implementing the *Provincial Growth Plan*:¹

- In terms of the total supply, the majority of employment land in Brampton — approximately 3,100 net ha — is within the Built Boundary. This includes the older, largely occupied areas around the LBPIA, as well as other areas in various stages of development.
- The remaining 1,180 net ha of employment land are located outside of the Built Boundary. These areas include, for the most part, the Bram West, Northwest Sandalwood, Highway 427, Bram East, and Vales North. In some cases, however, small portions of these areas are within the Built Boundary.

The supply of employment land by Employment Area, including the development status of the designated Employment Areas and their location relative to the Built Boundary, is shown on the following page.

¹For the purposes of planning to achieve specific density and intensification targets, the Province has defined the Built Boundary for communities within the GTA. For detail, see Built Boundary for the Growth Plan for the Greater Golden Horseshoe, Ministry of Public Infrastructure Renewal, 2008

MAP 2: CITY OF BRAMPTON VACANT AND OCCUPIED EMPLOYMENT LAND



Source: Hemson Consulting Ltd. based upon City of Brampton's Official Plan & Places to Grow, *Built Boundary for the Growth Plan for the Greater Golden Horseshoe, 2006*, Ministry of Public Infrastructure Renewal.

2. Net Effective Vacant Supply Is About 1,200 Net Ha

The vacant employment land supply of 1,420 net ha does not include an adjustment for long-term vacancy. In most municipalities, a small portion of the designated supply remains vacant over the long-term, typically about 5% of the total occupied and vacant supply.

Long-term vacancy may occur for many reasons, including: lands held for future expansion, but not used within the planning period; lands held off the market by the owners for their own reasons such as financial, tax or estate planning purposes; and lands that have a challenging configuration, access or other encumbrance.

As shown in Table 14 over, long-term vacancy in the City of Brampton amounts to about 210 net ha. After adjusting for long-term vacancy, the net *effective* vacant supply is approximately 1,200 net ha. This is the appropriate supply to be used for long-range planning. Ignoring long-term vacancy overstates the future capacity of the land base, with resulting implications for land use planning and servicing.

This supply does not include the planned employment land in Northwest Brampton, which would increase the net effective supply to a maximum of 1,600 net ha, not accounting for long-term vacancy.

Component of Estimate	net ha
Total employment land supply (occupied and vacant)	4,280
Long-term vacancy adjustment of 5%	210
Net vacant supply estimate	1,390
Less long-term vacancy adjustment	(210)
Net effective vacant supply	1,180

Source: Hemson Consulting Based on City of Brampton Employment Land Inventory

3. There Are No Significant Servicing Constraints to Land Development

Generally, servicing is not a constraint to the City of Brampton's employment land development. The following key points warrant attention in this regard:

- In Brampton's largely developed employment areas, which include Airport Intermodal, Bramalea South Gateway, Highway 410 and others, water and sewer servicing is available. Trunk servicing is planned for all other areas. Where current demand exists, servicing has been successfully provided. According to the Brampton's employment land inventory, only 6 parcels with a combined net area of 43 ha in Bram West are not within 500 m of a water and sewer trunk line.

- Major highway infrastructure in the vicinity of the City of Brampton includes the planned Highway 427 extension in Vaughan, which can only be constructed after an environmental assessment to determine an appropriate alignment for the extension is completed. It also includes long-term plans for an east-west corridor north of Brampton, and a north-south connector between Highway 401/407 and the east-west corridor.
- Within Brampton, the key large-scale transportation issue for goods movement is the ultimate status of the transportation corridor in the Bram West Employment Areas. The north-south corridor within Brampton may ultimately be the north-south corridor envisioned by the Province or perhaps a regional or local arterial road connecting through Bram West to the Northwest Brampton urban expansion areas.
- Ultimately, the North-South transportation corridor will significantly improve the competitive position of both the Bram West area and any potential employment areas that are designated in Northwest Brampton. Since Energy is also constructing an 875 Megawatt generating station to service existing and future development.
- Regarding hydroelectric servicing, the Ontario Ministry of Energy has plans to increase generation capacity in the Western GTA. Additionally, there is a new generating station under construction in Halton Hills which would also be able to provide capacity to the City of Brampton should the need arise.

B. TRADITIONAL INDUSTRIAL ACTIVITIES DOMINATE THE OCCUPIED EMPLOYMENT LAND

Consistent with the City's overall economic orientation, major clusters of traditional industrial activities are observed in the City of Brampton, including: manufacturing, wholesale trade and transportation and warehousing.

Among the top 10 largest concentrations of traditional industrial activity within the Region of Peel are two locations in Brampton: the Airport Intermodal (4th) and Highway 410 (7th) Employment Areas. Both of these areas show a significant concentration of manufacturing uses, including transportation equipment, metal products, plastics and rubber, and food, beverage and tobacco processing.¹

1. Significant Components of Brampton's Economy Are in Sectors That Depend on Transportation

When considered in terms of economic sectors, it is clear that significant components of the City of Brampton economy are engaged in activities that depend upon transportation, in particular goods movement, warehousing and logistics. As discussed in Chapter 2:

¹For detail on the industrial structure and major economic clusters in the Region and City of Brampton, see *Understanding Employment Land in the Region of Peel*, prepared by Hemson Consulting Ltd., in November 2005.

- The top three sectors of employment in 2006 were manufacturing, trade and transportation and warehousing;
- Over the 2001 to 2006, growth in employment was dominated by transportation, warehousing and wholesale trade, which accounted for approximately 30% of the overall growth;
- The overall composition of the economy seems to be shifting even more towards goods movement industries, as suggested by a fall in the share of manufacturing and rise in the share of transportation-related uses; and
- While the overall share of employment may have declined somewhat, Brampton actually accommodated *growth* in manufacturing employment, which is a notably different pattern than in the GTA/H overall, where employment in manufacturing actually declined, but was balanced by growth in services.

Based on the profile of employment by economic sector, it is clear that the City of Brampton economy is oriented strongly towards activities that depend upon the transportation system, such as warehousing and logistics. While goods manufacturing and distribution are increasingly becoming separate activities, they remain part of a complex arrangement of economic activity that continues to take place in primarily single-storey, industrial-type buildings within the designated Employment Areas.

This is reflected in the pattern of building occupancy on the occupied employment land supply.

2. A Building Coverage of 25% to 30% Is Consistent with This Economic Orientation

An examination of the building density on occupied parcels in the City of Brampton suggests that most of the economic activities accommodated on employment land are in the form of land-extensive industrial-type facilities. As shown in Table 15 on the following page, building coverage on employment land in Brampton averages approximately 25%.

A building coverage of 25% to 30% is normally expected in employment areas oriented towards transportation-related uses, and the profile in the City of Brampton is consistent with this pattern:

- Building coverage can be used as a good approximation of building density, since most of the industrial space in Brampton is in single-storey structures. Much of a building's footprint is determined by what occurs around the building.
- Goods movement, for example, is largely trucking-based for manufacturing and distribution facilities. Trucks require space to manoeuvre into and out of loading facilities. Trucks in North America have also become larger over recent decades and the use of double-trailers is becoming more common in some jurisdictions. Truck size tends to increase pavement requirements thus reducing the building coverage.

Employment Area	Building Coverage
Airport Intermodal	31%
Bram East	25%
Bram West	17%
Bramalea-South Gateway	31%
Central Area	30%
Downtown North	42%
Huronontario South	16%
Highway 410	30%
Highway 410 N	13%
Highway 427	20%
McLaughlin North	31%
Northwest Sandalwood	24%
Vales North	9%
Scattered Sites	19%
Total	24%

Source: Hemson Consulting based on City of Brampton Employment Land Inventory

Notes: Only occupied parcels with buildings on them are included in the calculation.

Areas where there is an insufficient available sample of parcels are shown as n/a. While the data are limited for Bram West, site plans in this area indicate higher than average coverages consistent with current market trends.

- An increasingly common approach for warehousing and distribution is the use of “cross-dock” facilities.¹ Outdoor areas are required for employee and visitor parking and, for many companies, some outdoor storage area is required. Planning policies also require portions of the land base to be used for landscaping and buffering which reduces potential building density.
- One particular area of concern for Brampton’s employment land planning that has emerged over recent years is the increased use of parked truck trailers as ancillary storage for outdoor storage of products and materials within areas where outdoor storage is not permitted. This is further evidence of the importance of these types of activities to the Brampton economy.

3. Employment Land Density Is Below The Provincial *Growth Plan* Targets

As a result of the City of Brampton’s propensity for transportation-related uses, the overall density of employment land is relatively low. As shown in Table 16 on the following page, the density of employment on employment land in Brampton is estimated to be approximately 38 jobs per net ha, or 28 jobs per gross ha as defined in the *Growth Plan*.

¹In cross dock facilities loading doors are located along two sides of the building, often so that inbound goods can come in one side, be sorted, and then get shipped out from the other side. This requires truck turning areas on both sides of the building instead of one side in a more traditional arrangement.

Table 16	
Estimate of Employment Land Density City of Brampton, 2007	
Occupied Employment Land with Employment	2,500 net ha
Employment Land Employment	94,100 jobs
Net Density (jobs per net ha)	37.6
<i>Growth Plan</i> Density (jobs per total ha)	28

Source: Hemson Consulting Ltd., based on information provided by the City of Brampton

Note: Occupied employment land and employment land employment excludes land and employment accounted for by major retail and offices. *Growth Plan* density is estimated by applying a 75% adjustment.

The density of employment land is calculated based on the total occupied land area and the total employment within the employment areas from the City's Employer Census, net of major retail uses for both land and employment. Additional adjustments have also been made to exclude parcels for which employment or land data may be either missing or in some cases double-counted.

The density is lower than in 2003, when it was estimated to be approximately 42 jobs per net ha, in part the result of a better set of land data, but also the result of newer employment land development at lower densities.

The density of 38 jobs per net ha is slightly lower than the density of 42 jobs per net ha estimated in 2003 in work undertaken for the Region of Peel.¹ One of the reasons is that much of the recent development on employment land in Brampton has been in warehousing and logistics, which tends to occur at lower densities.

According to the development community, the average of density of new warehousing and logistics facilities in the City of Brampton is between 20 and 25 jobs per net ha.² And, information from the City's employment and land inventory suggests that the density for specific transportation-related uses could be even lower:

- Of a total of 51 parcels identified as developed with warehousing activities, a total employment of approximately 3,900 jobs was observed on a total land area of approximately 290 net ha. This translates into a density of 13 jobs per net ha;
- Of a total of 84 parcels identified as developed with truck terminals, the density is even lower — a total employment of approximately 3,700 jobs was observed on a total land area of approximately 333 ha, which translates into a density of 11 jobs per net ha; and

¹For details, see Understanding Employment Land in the Region of Peel, prepared by Hemson Consulting Ltd., November 2005.

²For details, see Development Industry Focus Group Session, Draft Summary Report, prepared by Lura Consulting Ltd., February 29, 2008.

- For the warehousing activities building coverage was approximately 42%, with a floor space per worker ratio (FSW) of 315 m² per worker. For truck terminals building coverage was 25%, with a FSW of 226 m² per worker.

While preliminary estimates from the Region suggest that the Region-wide density of warehousing and truck terminals may be slightly higher — between 18 and 33 jobs per ha respectively — these densities remain substantially below the overall *Growth Plan* density target of 50 persons and jobs combined per ha, which translates into a net density over 65 persons and jobs per net ha.

Observed employment land densities are also below the expectation of the *City of Brampton Official Plan*, in which current employment land designations were based on the anticipation that future development would occur, on average, at a density of 37.5 employees per net ha.

4. An Emerging Trend Is for Community Uses to Locate Within Employment Areas

In addition to the shift towards larger facilities and lower employment densities, another emerging trend is for community uses to locate within the designated Employment Areas. Consistent with the experience of the City of Mississauga, a number of non-industrial uses are increasingly demanding locations within Brampton's designated Employment Areas, including schools (mainly private), community and recreation centres and other institutional uses such as cultural centres.

These types of uses will often seek to locate within employment areas, mainly because of the high price of land within existing residential communities — an unintended consequence of planning for higher residential densities. In a number of cases, community uses and in particular Places of Worship are located near or at the edge of the designated Employment Area, in close proximity to established residential areas. The pattern is illustrated on the map on the following page.

The trend of demand for community uses on employment land is anticipated to continue as the urban land supply becomes more constrained for all uses.¹ The City of Brampton is currently assessing the extent to which these uses should be restricted in the future.²

Overall, however, the pattern of development indicates that all of the City's Employment Areas are suitable and marketable as employment land. The City's occupied employment land supply is well-developed, particularly the areas around the Airport. The vacant employment land supply is relatively unconstrained and well-located considering existing and planned transportation investments, particularly the North-South transportation corridor.

¹For details, see *Employment Land Review Study, prepared by Hemson Consulting Ltd., for the City of Mississauga in June 2008.*

²For details, see *Places of Worship Policy Review, prepared by Macaulay Shiomi Howson Ltd., in January 2008.*



PLACES OF WORSHIP CITY OF BRAMPTON

Legend

	EXISTING SITE
	SITE UNDER CONSIDERATION (BY NUMBER)
	REMOVED FROM REGISTER
	PROPOSED SITES (BASED ON THE SUBSIDIARY PLAN)
	INDUSTRIAL/COMMERCIAL OFFICES, PLANT INSTALLATIONS
	REARAGED CONDOMINIUM OFFICES, PLANT INSTALLATIONS

FEBRUARY 2009

Ward	Lot Number	Place of Worship Name	Address	City of Brampton File Number
Ward 1	101	St. John's Anglican Church	101 St. John's St.	101-001
	102	St. Paul's Anglican Church	102 St. Paul's St.	102-002
	103	St. Peter's Anglican Church	103 St. Peter's St.	103-003
	104	St. James' Anglican Church	104 St. James' St.	104-004
	105	St. Mary's Anglican Church	105 St. Mary's St.	105-005
	106	St. Michael's Anglican Church	106 St. Michael's St.	106-006
	107	St. George's Anglican Church	107 St. George's St.	107-007
	108	St. Andrew's Anglican Church	108 St. Andrew's St.	108-008
	109	St. Basil's Anglican Church	109 St. Basil's St.	109-009
	110	St. Nicholas' Anglican Church	110 St. Nicholas' St.	110-010
Ward 2	201	St. Francis' Roman Catholic Church	201 St. Francis' St.	201-011
	202	St. Ignace' Roman Catholic Church	202 St. Ignace' St.	202-012
	203	St. Raphael's Roman Catholic Church	203 St. Raphael's St.	203-013
	204	St. Elizabeth's Roman Catholic Church	204 St. Elizabeth's St.	204-014
	205	St. Ann's Roman Catholic Church	205 St. Ann's St.	205-015
	206	St. Clare's Roman Catholic Church	206 St. Clare's St.	206-016
	207	St. Theresa's Roman Catholic Church	207 St. Theresa's St.	207-017
	208	St. Joseph's Roman Catholic Church	208 St. Joseph's St.	208-018
	209	St. Patrick's Roman Catholic Church	209 St. Patrick's St.	209-019
	210	St. Brigid's Roman Catholic Church	210 St. Brigid's St.	210-020
Ward 3	301	St. Vincent's Roman Catholic Church	301 St. Vincent's St.	301-021
	302	St. Rita's Roman Catholic Church	302 St. Rita's St.	302-022
	303	St. Agatha's Roman Catholic Church	303 St. Agatha's St.	303-023
	304	St. Cecilia's Roman Catholic Church	304 St. Cecilia's St.	304-024
	305	St. Thome's Roman Catholic Church	305 St. Thome's St.	305-025
	306	St. Lawrence's Roman Catholic Church	306 St. Lawrence's St.	306-026
	307	St. Basil's Roman Catholic Church	307 St. Basil's St.	307-027
	308	St. Nicholas' Roman Catholic Church	308 St. Nicholas' St.	308-028
	309	St. George's Roman Catholic Church	309 St. George's St.	309-029
	310	St. Andrew's Roman Catholic Church	310 St. Andrew's St.	310-030
Ward 4	401	St. John's Anglican Church	401 St. John's St.	401-031
	402	St. Paul's Anglican Church	402 St. Paul's St.	402-032
	403	St. Peter's Anglican Church	403 St. Peter's St.	403-033
	404	St. James' Anglican Church	404 St. James' St.	404-034
	405	St. Mary's Anglican Church	405 St. Mary's St.	405-035
	406	St. Michael's Anglican Church	406 St. Michael's St.	406-036
	407	St. George's Anglican Church	407 St. George's St.	407-037
	408	St. Andrew's Anglican Church	408 St. Andrew's St.	408-038
	409	St. Basil's Anglican Church	409 St. Basil's St.	409-039
	410	St. Nicholas' Anglican Church	410 St. Nicholas' St.	410-040

C. ABILITY TO PROVIDE LARGE VACANT PARCELS IS A MAJOR COMPETITIVE ADVANTAGE

Looking to the future, one of the City of Brampton's major competitive advantages is its ability to provide large vacant development parcels. As shown in Table 17 over, the City of Brampton has a significant number of large vacant parcels within its vacant employment land supply.

As can be seen, the largely undeveloped areas of Bram West, Highway 427, Highway 410 and Bram East contain most of the large vacant development opportunities. There is also the potential to provide large vacant parcels in the Northwest Brampton urban expansion area, where a range of between 400 and 500 net ha of new employment land designations are being contemplated. Because this new designation has not yet been approved by the Region and Province, however, it is not included in the supply analysis.

The large vacant parcels in these locations represent a significant share of the total vacant supply in the City of Brampton. The presence of large parcels in the vacant employment land supply is important to the City, since it is these types of parcels that provide the most flexibility in adapting to changing market conditions and responding to shifts in building space demand.

	<1 ha	1-6 ha	6 + ha
Airport Intermodal	53	30	7
Bram East	19	8	7
Bram West	21	14	17
Bramalea South Gateway	4	4	0
Central Area	1	0	0
Downtown North	0	1	0
Hurontario South	1	0	0
Highway 410	16	12	0
Highway 410 North	2	4	5
Highway 427	11	48	27
McLaughlin North	2	1	0
Northwest Sandalwood	5	2	3
Vales North	34	4	0
Other Scattered Sites	9	4	1
Total	178	132	67
Total Land Area	66	392	908
Share of Total Vacant Supply	5%	28%	67%

Source: City of Brampton Employment Land Database

For the most part, the large employment land parcels will be subdivided into parcel sizes appropriate to the market conditions at the time that development is occurring. However, from a long-range planning perspective, large parcels should also be available for the rare, but important occasions where a single user requires a large site. The ability to provide large vacant parcels is a major advantage for accommodating future demand.

1. Demand for Employment Land Will Be Strong Over the Next 25 Years

A significant component of the employment forecast for the GTAH in the Provincial *Growth Plan* will be accommodated in industrial-type buildings on employment land, consistent with current built forms. As noted in our previous reports, the GTAH remains one of the most industrialized economies in Canada and the United States.¹

As shown in Table 18, in the GTAH, approximately 42% of future employment growth will be employment land employment, which is forecast to grow by approximately 470,000 jobs from 2006 to 2031. The share of growth in employment land employment is somewhat higher for the 905 regions of York, Peel, Durham and Halton, which, taken together, are anticipated to accommodate approximately 50% of their future jobs as employment land employment.

¹For detail, see Employment Land Review Study, prepared by Hemson Consulting Ltd., for the City of Mississauga in June 2008

Type	2006	2031	Growth	Share
Major Office	760	1,070	300	27%
Population Related	1,110	1,490	380	33%
Employment Land	1,310	1,770	450	40%
Total Employment	3,180	4,330	1,150	100%

Source: *The Growth Outlook for the Greater Golden Horseshoe*, Hemson Consulting Ltd., Compact Growth Scenario Reference Forecast, updated with 2006 Census Employment information. May not add due to rounding.

The forecast growth in employment land employment will, in turn, continue to drive demand for industrial-type space and employment land to accommodate it. With the exception of small number of suburban office nodes, the majority of future employment land development will be large-scale industrial-type facilities.

2. The City of Brampton Is Well-Positioned to Accommodate Future Demand

The Region of Peel, in particular the Cities of Mississauga and Brampton, is a highly competitive location for economic development. Communities in southern Peel have developed significant amounts of employment land, the result of a combination of good planning and a competitive location with respect to the transportation network.

Further improving the employment land prospects for the City of Brampton is the pending build-out of competing employment areas and business parks in the City of Mississauga. The community's historic share of the market has already begun to shift to other locations:

- The City of Mississauga has traditionally been the Region of Peel's leader in employment land development and has emerged as one of the most important centres for manufacturing, trade, and warehousing in the GGH.
- However, following decades of steady employment land development, the Mississauga's supply of greenfield employment land is nearly built-out. Recent work for the Region of Peel has estimated that the City's employment land supply is about 85% occupied and will be fully occupied by about 2012.¹
- A key part of the market's adjustment to Mississauga's pending build will be the City of Brampton accommodating a portion of the market demand for employment within Peel Region that has historically been accommodated by the City of Mississauga.

A number of key market opportunities are associated with this "shift" in market demand:

¹For detail, see *Understanding Employment Land in the Region of Peel, prepared by Hemson Consulting Ltd., in November 2005.*

- Mississauga's main employment areas competing with Brampton are the Gateway and Northeast employment districts and the Meadowvale Business Park.
- From a market perspective, the Gateway and Northeast employment districts are closely related to Brampton's large existing areas on Highway 410 and near Airport Road. As these Employment Areas are largely built-out, however, the main market opportunity will be for Bram East, Highway 427 and Highway 410 North when these areas become available to the market.
- Mississauga's Meadowvale Business Park is considered one of the most valuable, prestigious and successful business parks in Canada and is related to the Bram West Employment Area in the City of Brampton. The two areas are effectively contiguous and have superb access to Highway 401 and Highway 407.
- As the Meadowvale Business Park is nearly built out, the main market opportunity will be for prestige industrial and office development in Bram West and, ultimately, in Northwest Brampton once appropriate transportation infrastructure is put in place.

The City of Brampton is very well-positioned to take advantage of these opportunities, particularly as it relates to attracting goods movement industries, warehousing and logistics and other relatively low-density, land-extensive employment activities to new greenfield areas outside of the Built Boundary. Significantly altering this pattern, particularly with respect to increasing employment land densities, will be a major challenge.

3. Communities in York and Halton Region Will Also Be Competing for Future Investment

While the City of Brampton may be well-positioned to accommodate Mississauga's historic market share, this is an opportunity that will be shared with other communities. Both the Town of Milton and the City of Vaughan, for example, have significant development potential and are in a strong position to compete with Brampton for employment land development over the next 25 years.

Both Vaughan and Milton currently have a large supply of vacant employment land.¹ Vaughan and the Milton market area both currently have a vacant designated employment land supply in the range of 1,200 ha to 1,400 ha, which is similar to Brampton's supply. Both communities are also considering additional employment land designations as part their current *Growth Plan* conformity and official plan review processes:

- In total, Vaughan has 3,390 net ha of employment land, of which York Region estimates 2,120 net ha are occupied and 1,270 net ha are vacant.

¹Milton currently has a major business park on Highway 401 at Highway 25. The most recent urban expansion in Halton Region added significant supplies of employment land to the eastern edge of the built-up portion of Milton and along the north side of Highway 401 in the Town of Halton Hills, extending west from the Brampton boundary. For the purposes of this market discussion the lands in both Milton and Halton Hills are treated as a single Milton market area.

- A significant portion of Vaughan's vacant employment land, about 1,000 hectares, is located on the Highway 427 employment lands abutting Brampton.
- The majority of these lands, about 620 net ha, are not available for development until the alignment of a planned northward extension of the Highway is finalized. Therefore, only 380 net ha are readily available for development in this location.
- In general, the lands in Vaughan will allow Vaughan to maintain its current role within the GTAH market and so they do not pose a large threat to Brampton's growth prospects. Locally, however, lands in the eastern part of Brampton will need to be developed in a way that allows them to compete with the Vaughan lands on the immediate other side of the boundary.
- While the supply of employment land in the Town of Milton is limited, the Town is currently planning to bring approximately 600 net ha of employment land to market in the Derry Green Corporate Business Park, located along Highway 401.

From a broad market perspective, the former market share of the City of Mississauga will likely be sufficient to provide for the growth aspirations of both Brampton and the Region of Halton, and the City of Brampton is well-positioned to take advantage of these market shifts.

However, to take full advantage of future economic opportunities, the City of Brampton will still need to provide an appropriate supply of employment land to remain competitive, particularly lands in the western part of the City to compete with lands in Halton Region. Accordingly, the next section turns to a discussion of the adequacy of the employment land supply to achieve this objective.

D. AT LEAST THE CURRENT DESIGNATED SUPPLY OF EMPLOYMENT LAND IS REQUIRED

The City of Brampton’s employment land requirements are estimated by applying a density factor to the employment land employment that is forecast in 2031. While the land need estimate depends strongly on the density that is chosen, it is clear that at prevailing densities — either City-wide or for more recent development — there will be significant shortage of employment land to 2031.

Based on this analysis, at least the current supply of employment land should be maintained. Additional supply needs to be designated in the Northwest Brampton urban expansion area, in at least the previously estimated amount of 400 to 500 net ha. Additional employment land designations would be justifiable should the City choose to convert employment land to achieve other planning objectives in the Central Area, Downtown or sites in proximity to planned higher-order transit.

1. Current Trends Suggest That the Density of New Employment Land Development Is Declining

Currently, the City-wide employment land density is estimated to be approximately 38 jobs per net ha. Despite planning objectives to the contrary, economic trends indicate that densities on employment land are likely to continue to decline as a result of two factors:

- First, over the forecast period, Brampton’s employment land density is likely to decrease because of the continued development of larger and more efficient industrial buildings, which are being built at densities lower than the current City-wide density; and
- Second, the employment density of existing areas, particularly the larger, older areas will begin to decline. Most employment areas follow a pattern of maximizing employment densities when first built, and then after a couple of decades begin to decline in employment density as buildings age. This is referred to as “declines in the existing base” and in our view is a key factor to be considered in long-range planning.

2. The Challenge of Increasing Employment Densities Has Been Recognized by the Province

The challenge of reducing the land taken up by industrial type by increasing densities is now widely acknowledged by most planners, including the Province, in their background report on employment land:

The manufacturing sector is expected to continue to be a major contributor to the economy of the Greater Golden Horseshoe and the whole of Ontario. Productivity is expected to continue to grow in this sector, primarily due to new technologies and increases in production efficiencies. Research shows that the Greater Golden Horseshoe is following North American and global trends of building bigger and more efficient industrial facilities that house fewer employees, particularly in the logistics and distribution sectors. So, even as employment density (jobs per hectare) in manufacturing declines, it is expected that this important economic sector will continue to generate significant land demand.¹

The City of Brampton is designating its final area of land in northwest Brampton for urban uses, and designated greenfield areas are to be planned to support the other objectives of the *Growth Plan*, most importantly their contribution to economic vitality and the creation of complete communities.

Accordingly, the amount of employment land that should be provided in Northwest Brampton is a key concern. For the purposes of this discussion paper, a range of demand scenarios has been prepared.

¹Planning for Employment in the Greater Golden Horseshoe *Background Paper*, May 2008, prepared by the Ontario Growth Secretariat, Ministry of Public Infrastructure Renewal, Province of Ontario.

3. A Range of Demand Scenarios Has Been Prepared as Input to Future Planning

In order to test the adequacy of the City of Brampton's employment land supply from a market, or "current trends" perspective, a range of density is used:

- The low end of the range of 25 employees per net ha, which is characteristic of new warehousing and distribution facilities which are highly automated and relatively low-density.
- The mid-range is 38 employees per net ha, which is the current average employment density in Brampton.
- The high end is 45 employees per net ha, a level with an increase in density that may be in the realm of possibility, as it is consistent with development in many neighbouring communities.

As shown in Table 19 below, under any of these densities there would be a significant shortage of employment land in the City of Brampton to 2031. Declines in the existing base would not be accounted for in these calculations.

At the high end of the density range, there would still be a shortage of 500 net ha of employment land in the City of Brampton. And even if the previously estimated 400 net ha of employment land for Northwest Brampton is included, there would still be a shortage of between 120 and nearly 1,500 net ha of employment land to 2031. This is a conservative estimate of employment land need because it does not fully account for the portion of population-related employment that typically locates on employment land.

Table 19			
Estimate of Pure Employment Land Need City of Brampton to 2031			
Total Growth in Employment Land Employment, 2006 to 2031	87,200		
Growth Requiring New Employment Land Occupancy	76,300		
Density of Future Employment Land Employment (Jobs per net ha)	45	38	25
Pure Employment Land Need (ha)	1,700	2,010	3,050
Net Effective Vacant Supply (ha)	1,180		
Surplus or (Shortage)	(520)	(830)	(1,870)
Including Previously Estimated Supply Northwest Brampton (net ha)	400	400	400
Revised Surplus or (Shortage)	(120)	(430)	(1,470)

Source: Hemson Consulting Ltd. based on City of Brampton Employment Land Inventory

The most significant implication of this analysis, however, is that the full amount of employment land demand suggested even at the highest density scenario requires more employment land in Northwest Brampton than suggested in earlier work. The conclusions suggests that, in addition to designating additional greenfield supply, the City of Brampton will also need to take actions to promote higher employment densities, including a greater amount of employment intensification.

E. OPTIONS TO INCREASE EMPLOYMENT DENSITY WILL ALSO NEED TO BE CONSIDERED

Although not explicitly addressed in the *Growth Plan*, implicitly included in the notion of good planning, or “complete communities”, is the notion of achieving higher densities on employment land and a greater level of employment intensification.

From the City of Brampton’s perspective, it will be necessary to consider options to increase employment densities in order to accommodate future jobs growth, and such an approach may even provide higher tax revenues for the City, particularly related to the choice between manufacturing and warehousing uses. In order to achieve this objective, however, specific action will need to be taken from both a policy and financial perspective.

1. Historically, the Potential for Employment Intensification Has Been Limited

Many planners and policy-makers have suggested that the density of employment land be increased — the issue popularly referred to as “job sprawl”. Similarly, when municipalities face constraints related to vacant employment land supply, there is often an expectation that employment intensification will enable higher densities and allow for a substantial decrease in overall employment land requirements.

In the past, however, the potential for employment intensification has been limited. There is little evidence of employment intensification occurring in other communities in the GTAH and there is no established economic base for employment intensification. The experience in Brampton and other GGH municipalities is that planning policy has a weak influence on employment intensification.

On the contrary, because of the increased reliance of economic activity in the GTAH on truck transportation and efficient production systems — including “just-in-time” delivery — the location of new industrial development is increasingly dependent upon good access to transportation infrastructure, particularly roads.¹ This circumstance has recently been recognized by the Province.

There is one way, however, to increase the density of employment land, and that is to plan for major offices in these locations. However, this approach is problematic from two perspectives: first, there will not be enough major office demand to achieve this objective in all of the City’s designated Employment Areas, and it would be contrary to other *Growth Plan* objectives to focus such development in the Urban Growth Centres.

¹*While there are some specific differences between industry types, the common locational requirement for most industries is access to large contiguous employment areas that are well-served by road transportation infrastructure and properly buffered from other uses, primarily residential. For additional details, see City of Hamilton Comprehensive Employment Study, Hemson Consulting Ltd., November 2006.*

2. In the Future, However, the Potential for Intensification May Improve

While there may not be a great deal of evidence currently suggesting that the pattern of land use is shifting significantly, a number of factors suggest that in the future the potential for employment intensification may improve. There is no doubt that some shifts are occurring in the “status quo” of how companies in Canada and the United States do business, including:

- The current financial crisis. Although the ultimate outcome remains unclear, the current global financial crisis is almost certain to have some effects on the business decisions of some firms, including those that may demand sites on employment land;
- Continued restructuring in the manufacturing sector, which may result in growth in some types of manufacturing for which access to a central location and a large labour force are important. One of the effects of this restructuring may be that existing sites within older established business parks may become more attractive;
- The success of the Provincial *Growth Plan* in focussing more population growth within existing area, which may further increase the attraction of existing employment areas to certain types of economic activities, particularly uses in the “talent” or “creative” economies; and

- A rising interest in infrastructure investment, particularly transit, which may provide a higher level of transportation access to existing areas. Should existing areas become *more* accessible, this may improve their competitive advantage.¹

While it may be too early to determine if these changes will alter the pattern of employment land development over the long term, there is no question that some shifts are occurring which may affect, and hopefully improve, the prospects for employment intensification.

3. The Shift Towards Warehousing and Distribution Uses May Have Tax Planning Implications

From the analysis presented in this report, it is clear that transportation-related uses such as warehousing and distribution have recently been and will likely continue to be major contributors to new development on employment land. As this shift occurs, one of the questions that has arisen relates to the effects of this pattern of growth on Brampton's assessment base.

¹As discussed in some of our previous reports, and many others, the "infrastructure deficit" is now widely recognized. The draft plan recently developed by Metrolinx is an indication of the broad desire to improve the region's transportation system, and includes nearly 100 specific actions to reduce congestion and maintain economic competitiveness, including a major expansion to the rapid transit network.

While there are various ways of looking at the question, the most straightforward is to consider it in relation to an individual site located within one of the City's designated Employment Areas, and being developed either with manufacturing uses or alternatively for some type of lower-density warehouse or distribution purpose. Three factors are of particular relevance to the comparison:

- The size of the building;
- The type and value of the building; and
- The classification for assessment purposes.

If the site were developed with a manufacturing facility, the building coverage would likely be in the order of 30% to 35%. This would leave sufficient site area to accommodate the number of parking spaces that would be required for the plant's employees together with space for trucking requirements.

In contrast, if developed with a building for warehouse or distribution uses, the coverage would likely be somewhat higher — perhaps as much as 50%. This is because warehouse and distribution activities typically require fewer employees for a given amount of space compared to manufacturing activities and less of the site area would be required for employee parking.

While there are differences between the activities that the two uses accommodate, they generally require buildings with similar characteristics in terms of construction type, quality and finish. In unique cases, however, some manufacturing facilities are more elaborate and may include specialized plants or very high-quality office space.

On the other hand, warehouse and distribution buildings may have unusually large ceiling heights which adds to the value of the building. Considering the various balancing factors, there is no particular reason to anticipate that a given site of equal size developed for manufacturing purposes would be assessed for more or less than if developed for warehouse or distribution purposes.

The one specific factor that would differentiate a site used by a manufacturer from one used for warehouse or distribution use from a taxation point of view is the classification for assessment purposes — the Tax Class and, in turn, the tax rate that would be applied.

In Brampton, properties which are occupied by manufacturers are classified *Industrial* for which a Class Ratio and tax rate is currently about 13% higher than properties classified *Commercial*. This is the classification applicable to warehouse and distribution uses. For this reason, holding other assessment factors constant including Regional tax policy, a manufacturing property would generate a higher tax revenue for the City of Brampton than one used for warehouse or distribution purposes.

4. Specific Actions Will Need to Be Taken to Shift Towards More Intensive Forms of Employment

Although there may be both a broad public policy interest and potentially a municipal fiscal benefit associated with achieving higher densities on employment land or employment intensification, in order to achieve these objectives specific actions must be taken.

Land use planning, by its nature, is speculative as it operates by envisioning proposed or planned functions for parcels of land. Planning in its nature is forward-looking and deals with a variety of possible outcomes. Since the intent of the *Growth Plan* is to promote higher densities overall, including employment land, it is necessary to take specific steps, or specific actions, to achieve this objective:

- At a minimum, the opportunity must be protected. The supply of employment land must be preserved and protected for continued employment use. If conversion of employment land is permitted, particularly in well-located areas, the potential for higher employment densities and employment intensification is lost.
- In addition to maintaining the land supply, strong land use policy and program support is required to promote an increased efficiency in land and building use. Particularly, financial and other economic development support will be required to improve the competitiveness of existing and new areas.

The City of Brampton is very well-positioned to accommodate employment land development. Demand for employment land in the GTAH is anticipated to remain high, and the City has major advantages in its ability to provide large vacant parcels for development. The pending build-out of Mississauga provides a major opportunity for economic development, but this opportunity will also be shared with other communities.

To take full advantage of future economic opportunities, the City of Brampton will need to provide an appropriate supply of employment land to remain competitive, particularly lands in the western part of the City to compete with lands in Halton Region. In accordance with the *Growth Plan*, the City of Brampton will also need to take specific actions to increase the density of employment land and encourage higher levels of employment intensification.

Accordingly, the final chapter of this discussion paper suggests a number of policy directions for consideration by the City, the public and other interested stakeholders.

IV A NUMBER OF KEY POLICY DIRECTIONS ARE SUGGESTED TO MAXIMIZE THE DEVELOPMENT POTENTIAL OF BRAMPTON'S LAND AND BUILDING SUPPLY

It is important to note that the current City of Brampton official plan was prepared with knowledge of the draft Provincial *Growth Plan*, with the result that many of the Plan's key policy directions and principles are included in the City's vision for the future. As a result, the focus of this final chapter is on the more specific issues related to employment land planning in Brampton, which include:

- Ensuring that the availability of sufficient supply of employment land accommodate forecasted growth to support the GGH's economic competitiveness, pursuant to Section 2.2.1 of the *Growth Plan*;
- Minimizing the conversion of employment land to other non-employment uses including Major Retail, pursuant to Section 2.2.6 of the *Growth Plan* and Section 1.3.2 of the PPS; and
- Promoting a greater level of employment intensification, consistent with broader *Growth Plan* objectives for more compact urban form and limiting the greenfield land supply that is required to accommodate growth.

The following policy directions are suggested to achieve these objectives, and maximize the development potential of Brampton's employment land and building supply.

- Additional employment land supply should be designated in Northwest Brampton;
- The City should take actions to encourage higher densities on employment land, including the development of a strategy to attract more intense built forms and more compact development;
- The conversion of employment land to non-employment uses should be resisted; and
- Guidelines for community uses in designated Employment Areas should be developed.

A. ADDITIONAL EMPLOYMENT LAND SHOULD BE DESIGNATED IN NORTHWEST BRAMPTON

The City of Brampton has not yet established a land use vision for Northwest Brampton. However, it is clear from this updated analysis that some additional employment land supply needs to be designated. As such, the following estimates of the employment land need for Northwest Brampton are based on various density scenarios that will need to be addressed as part of developing the overall vision for the area.

At an absolute minimum, the 400 to 500 net ha of employment land recommended in the *Northwest Urban Boundary Review: Employment and Residential Land Demand Forecast in 2002* should be provided. Reducing the City's employment land need by planning for significantly higher densities is not recommended.

The City of Brampton's existing employment land supply will be built out by about 2021. Some new economic activity may be accommodated through redevelopment and reuse; however, this may not be enough to fully accommodate long-term demand. Brampton needs to designate more employment land in Northwest Brampton, the last remaining area in the City that does not yet have primary land uses designated.

The *Growth Plan* anticipates that the Region of Peel will continue to accommodate a significant proportion of the overall GTA employment growth. Because Brampton contains the majority of the Region's remaining greenfield development opportunities, the City will play a key role in achieving the Regional forecast and, therefore, the Provincial vision for growth.

The City of Brampton's ability to achieve the employment forecast relies heavily on its ability to provide an adequate supply of competitive, marketable employment land, consistent with its past growth patterns and the growth patterns of the rest of the western GTA. From a long-range planning perspective, it is clear that for the City of Brampton to properly serve its role in accommodating Regional employment growth and, in turn, achieve the Provincial vision for growth, additional employment land is required.

1. A Significant Area of Northwest Brampton Could Be Justified as Employment Land

On a net basis, Brampton's employment land areas (excluding major offices) has been planned at 37.5 employees per net ha. This is nearly identical to the estimated, City-wide employment land density in Brampton at approximately 38 jobs per net ha, though much recent development activity has been even lower at around 25 jobs per net ha.

As defined by the *Growth Plan*, this translates into a range of density of — at best — between about 20 to 30 jobs per net ha, which is significantly less than the target of 50 jobs and residents combined per ha. At this range of density, nearly the entire land area of Northwest Brampton, excluding the already-in-planning Mount Pleasant area, would be justifiable as employment land:

- As noted, City-wide employment land employment is forecast to grow by approximately 87,000 jobs from 2006 to 2031, of which vacant development land would need to accommodate about 76,000 jobs.
- At the densities of 25, 38 and 45 jobs per net ha that were tested, this growth would require 3,100, 2,000 or 1,700 net ha respectively.
- The City of Brampton's current net, effective vacant employment land is approximately 1,180 ha, meaning that future demand — at a range of densities reflecting current and planned development patterns — exceeds the currently designated supply by approximately 500, 800 or 1,900 net ha, depending on the density of development.

At a net-to-gross factor of approximately 80%, this would translate into a total of between 600, 1,000 or 2,300 gross ha of developable land. The Northwest Brampton area, including Mount Pleasant Secondary Plan area, has a total developable land supply of about 1,940 ha, based on earlier studies.

With the highest density assumption, the resulting need in Northwest Brampton would be slightly larger than recommended in the Northwest Brampton studies completed over 5 year ago. At the mid-range, the employment land need would amount to most of the land in Northwest Brampton, excluding the Mount Pleasant area. And at the lowest density factor, the need for employment land would exceed the amount of all lands available in Northwest Brampton, including the Mount Pleasant area.

2. Employment Land Need Should Not Be Reduced by Planning for Higher Densities

In order to accommodate future employment growth, the City of Brampton needs to retain virtually the entire supply of employment land, and put additional designations in place. While, in theory, overall employment land requirements can be reduced through the application of higher densities and planning for employment intensification, there are major risks associated with planning to achieve these objectives.

- On the one hand, planning for higher employment densities would make *Growth Plan* conformity more feasible, but at the same time it would result in underestimating employment land need.
- For example, in order to accommodate future employment land employment growth on the currently designated supply — excluding employment land in North West Brampton — a density of approximately 72 jobs per ha would need to be achieved, or approximately 54 jobs per ha as defined in the *Growth Plan*.¹

¹Growth in employment land employment of 87,200 jobs, divided by the net effective vacant land supply of 1,210 net ha, including an adjustment for long-term vacancy, results in a density of approximately 72 jobs per net ha.

- If planning were undertaken on the basis of such an increased employment density to meet the *Growth Plan* target, but then the density did not materialize, the consequence of this turn of events would be a build-out scenario for Brampton with far fewer jobs than currently anticipated and there would be no way to accommodate future employment needs to meet City, Regional or Provincial economic goals.
- Similarly, attempts to simply exclude some low-density uses locally might have some of the desired effect in Brampton, but will simply shift those uses elsewhere to other communities or rural areas. Low-density uses such as distribution centres, cement batching, highly automated manufacturing or even auto wreckers are necessary parts of the economic fabric. Simply shifting them elsewhere provides no planning benefit to the urban region while introducing potential economic inefficiencies to these industries.

To responsibly manage this risk, the City of Brampton will need to have maximum flexibility in accommodating future employment growth. To achieve this objective, the City requires the current amount of designated employment land as well as the supply in Northwest Brampton. Given that a significant shortage of employment land will exist even under an aggressive future density assumption, the maximum possible employment land designation should be put in place for the Northwest Brampton area.

3. Northwest Brampton Should Include Between 400 and 800 Net Ha of Employment Land

In 2001, an assignment was undertaken to evaluate the growth opportunities and land use options for the Northwest Brampton area. Three growth scenarios were considered:

- In Scenario 1, all of Northwest Brampton would be designated for residential use;
- In Scenario 2, approximately 850 net ha would be designated as employment land in Northwest Brampton and the balance would be designated for residential use; and
- In Scenario 3, approximately 425 net ha would be designated as employment land in Northwest Brampton would be designated for residential use.

Based on a consideration of a wide range of criteria, including the mix of land uses, housing, economic development and implications for services delivery, it was determined that either Scenario 2 or Scenario 3 was preferred, because it would be unwise for the City of Brampton to plan for an activity rate of below 40%, which would be the result of Scenario 1.¹

¹For details, see City of Brampton Northwest Brampton Urban Boundary Review (Revised Draft For Discussion) prepared by Hemson Consulting Ltd. in May 2001.

The key consideration in choosing between Scenario 2 and Scenario 3 was the need for employment land, and more specifically the degree to which either scenario was achievable given market conditions and the locational characteristics of Northwest Brampton. All of the growth scenarios preserved the identified environmental features and would have similar requirements in terms of the provision of City services.

At the time, the evaluation concluded that the Northwest Brampton area would be a competitive employment land location and that a range of between 400 and 500 net ha of employment land would be a reasonable basis for future land planning because it would result in a moderate level of mix of land uses, result in a City-wide activity rate of 42% by 2031 and accommodate about half of the demand for employment land beyond 2021. Since the preparation of this report, however, a number of economic conditions have changed, including:

- Rapid and sustained employment growth in the GTA and the City of Brampton (though 2006 was somewhat lower than had been expected);
- High levels of building activity which have significantly diminished the supply of employment land in the GTA and Brampton, largely because new development has been occurring at lower than anticipated densities; and
- Rapid population growth, which has not contributed to a live-work balance and instead has resulted in high-levels of out-commuting.

As a result of changing market conditions, and the City of Brampton's significant shortage of employment land, it is recommended that a larger amount of employment land be designated in Northwest Brampton: the 800 net ha of employment land is recommended, which is very close to the Growth Scenario 2 (850 net ha) as described in the original analysis. This scenario is considered appropriate for a two main reasons:

- Good planning demands that long-term options be kept open and the City would still have a sufficient supply of residential land in greenfield areas to accommodate the previously planned population targets; and
- Providing for additional employment land in Northwest Brampton will allow for a greater mix of land uses, thereby advancing Provincial and City objectives to provide for a balance of jobs and more complete communities.

By planning for additional employment land, Brampton will be better-positioned to achieve City and Regional economic objectives, and therefore the Provincial vision for growth, though meeting the greenfield density targets will remain exceedingly difficult — in our view, the presence of a set of numeric targets alone should not supersede all other economic policies in the *Growth Plan*, the *Regional Plan* or the *City of Brampton Official Plan*.

4. Employment Land Designations Should Be of the Highest Quality Possible

Of the many factors that combine to produce competitive employment land, two of the most important are transportation access and size. To be most competitive, employment land must be well served by major road transportation infrastructure, preferably 400-series highways. Employment areas must also be large enough to provide a wide range of site sizes, develop a sense of place and be appropriately buffered from surrounding uses.

Based on these requirements, new employment land designations in Northwest Brampton should be well-served by the road network, in particular the future north-south and east-west facilities, and phased in a manner that promotes orderly development. As recommended in our previous work, the employment designations should provide for flexibility in use and a high design standard.¹

5. Other Options to Increase the Employment Land Supply Should be Considered

On a more general note regarding the preferred location of future employment land, it is also suggested that, as far as practical, all future employment land designations should be bounded by very clearly defined boundaries, such as arterial roads or natural features.

To this end, there may be a small opportunity to adjust the boundary of the industrial designation in the Highway 427 Employment Area to Clarkway Drive, in order to create a more appropriate interface between residential and employment uses, and help to address the City of Brampton's need for employment land.

Even with additional employment land in Northwest Brampton, there is the potential that Brampton will not achieve its employment target on the existing and future employment land base. And, given that the ability of planning to significantly increase the density of employment land is limited, specific policy actions will also need to be taken to encourage higher employment densities and employment intensification, consistent with both the City's economic objectives and the *Growth Plan*.

¹For details, see the Bram West Community Design Study, Employment Land Allocation Analysis, prepared by Hemson Consulting Ltd., October 2002.

B. ACTIONS TO ENCOURAGE HIGHER EMPLOYMENT LAND DENSITIES SHOULD BE TAKEN

As part of developing a broad strategy for maintaining a competitive position with respect to employment land development in Brampton, policy initiatives to increase employment density should be examined. Initiatives to increase density can include strategies to attract more intensive employment land users or policy initiatives to promote a different pattern of development.

Encouraging employment intensification will involve two basic policy initiatives, both of which involve financial assistance either from the City of Brampton or senior levels of government: investments in infrastructure and financial incentives for existing areas.

1. Investment in Infrastructure May Be Required to Maintain Competitiveness of Existing Areas

The major opportunities for employment intensification within the City of Brampton are the large employment areas abutting the LBPIA, including the Airport Intermodal, Highway 410 and Bramalea South Gateway areas.¹

¹For details, see *Understanding Employment Land in the Region of Peel*, Hemson Consulting Ltd., 2005.

These areas have been very attractive locations for development as a result of their competitive location, including access to the main CN rail line. The Airport Intermodal Employment Area, for example, contains the CN intermodal facility as well as a number of recently constructed large-scale distribution facilities, including Canadian Tire and the Hopewell Logistics facility.

Planning to take advantage of intensification opportunities in these areas would be consistent with *Growth Plan* directions to promote a more compact urban form. Such plans, however, would require major investments in infrastructure in order to alleviate traffic congestion and promote additional employment growth. Given the scale of investment that would be involved, financial assistance from senior levels of government will be required.

2. Changes to Site Design and Other Development Standards Could Be Considered

While *significant* changes in the employment density profile cannot be achieved, there are some actions that can be taken to increase the density of new employment land through changes to site design and strategies to attract more employment-intensive uses.

Increased building density on employment land could be influenced by measures such as reducing the land areas devoted to landscaping, encouraging multi-storey construction for the office portion of industrial buildings, encouraging the shared use of entrances, truck turning area or parking, and the provision of structured parking.

Some of these changes, such as reduced or eliminated landscaping, may achieve a desired density goal, but may be contrary to other public interests, not currently economically feasible or apart from “normal” development practices and may be resisted. For example, shared use of space for truck entrances, turning, loading or storage may introduce significant hurdles for liability and security.

Such an approach would also mean a significant change to the City’s zoning by-laws in terms of rights of way and maintaining health and safety. The introduction of additional development and operational costs to businesses through regulation or inconvenience would also need to be carefully considered in the broader context of the economic competitiveness of the GTAH in North America and the competitiveness of Brampton within the GTAH.

3. Financial Incentives May Need to Be Provided to Promote Employment Intensification

In most communities, including the City of Brampton, the redevelopment economics of older employment areas or “brownfields” favours residential or major retail use in virtually every circumstance. Both of these types of development are strongly discouraged in employment areas under the *Growth Plan*. As a result, financial incentives could be required to shift the development economics to promote redevelopment or intensification of existing areas for employment uses.

The City of Brampton is currently experimenting with using some tools to stimulate new investment, particularly with the Central Area Community Improvement Plan (CIP) that seeks to stimulate development and redevelopment within Brampton’s central areas.

The City of Brampton will need to continue and expand this program to include all of the City’s Employment Areas, in order to direct funds and related policy initiatives, including tax increment grants or loans, towards employment intensification. The City will also need to expand initiatives to reduce the cost of doing business and lobby the Provincial and Federal Government for increased financial capabilities to attract new users to existing locations within the community.

A number of successful examples and tools can be drawn from the City of Toronto, including Community Improvement Plans (CIP), Tax Increment Equivalent Grants (TIEGs), the sale or lease of publicly owned lands, and a range of other programs to provide direct and in-kind financial incentives, including the New Toronto Employment Centre Project, which contains a program of tax incremental grant which has already stimulated a major new investment within one of the City’s older Employment Districts.¹

Any number, or a combination of all of these types of initiatives, could be considered as a means to promote employment intensification in Brampton.

¹*For details, see the Long-Term Employment Land Strategy, City of Toronto (Phase 2 Report) prepared by Hemson Consulting Ltd. in January 2007.*

4. Additional Economic Development Support Could Also Be Very Helpful

In addition to investment in infrastructure and financial incentives, the City should continue to provide strong economic development support to maintain the competitiveness of the economy. The City of Brampton Economic Development Office currently provides a range of support programs, including:

- Review of business plans, cost of doing business analysis and trade area analysis;
- Information on available industrial and commercial lands or buildings for sale or lease; and
- Assistance and consultation on forming a new business, site selection and due diligence.

These efforts must continue to be provided and expanded over time. This could include:

- The provision or improvement of infrastructure, including beautification programs, marketing campaigns and targeted area revitalization; and
- Labour force development initiatives, such as small business incubators; and
- An economic development strategy to attract uses that are not in traditional industrial sectors, including research and development, “new economy” uses, and advanced manufacturing.

Taken together, the intention is that these initiatives will help the City achieve an increased overall efficiency in the development of its employment land and building supply. When combined with the City’s other policy initiatives to increase the density of other uses, these initiatives will put the community in a better position to achieve the Provincial *Growth Plan* density objectives.

C. GUIDELINES FOR COMMUNITY USES IN EMPLOYMENT AREA ARE REQUIRED

As noted, a number of non-employment uses such as private clubs, Places of Worship and community facilities are locating on employment land in the City of Brampton. Institutional uses, for example, will often seek to locate within employment areas, mainly because of the high price of land within residential neighbourhoods — an unintended consequence of planning to achieve higher densities.

In several cases non-industrial institutional uses within designated Employment Areas are located in close proximity to residential areas. This trend is expected to continue as the City’s urban land supply becomes increasingly constrained for all types of uses and begins to provide more central place functions, including a wider range of community uses to serve a more diverse and older population as well as broader metropolitan-wide economic functions.

Some of the areas identified for managed change may be appropriate locations to concentrate new community and institutional facilities. However, new policies will be required to direct, restrict or concentrate institutional uses in ways that minimize disruption and destabilisation to industrial-type users to ensure that the community uses are well-planned in respect to such matters as parking and well-integrated into the surrounding areas:

- Recent work prepared by the City of Brampton has identified a shift to larger Places of Worship, the result of larger catchment areas and the development of auxiliary facilities, such as schools and residential development, to better serve the community.
- When Places of Worship are permitted within Employment Areas, there is the potential to create land use conflicts with noxious industries.
- Uses such as schools and banquet facilities tend to result in ongoing activity on the site, with implications for surrounding industries, particularly with respect to parking and traffic. Parking is a particular concern when it occurs illegally, in unsafe locations, or in a way that interferes with the normal operations of surrounding industries. The development of sensitive land uses such as schools and residential development also has the potential for conflict with industrial-type use.¹

¹For details, see Places of Worship Policy Review, prepared by Macaulay Shiomi Howson Ltd. in January 2008.

Although, from a planning perspective, the preference may be to accommodate Places of Worship within new and existing residential communities, the high value of residential land often makes this a challenge, particularly for assemblies with limited financial capital. Recognizing that demand for such facilities on employment land will likely continue, they may be appropriate within Employment Areas, provided that they do not have an adverse impact on industrial and employment activity and that they are well-planned and integrated, particularly with respect to parking and traffic.

D. CONVERSION OF EMPLOYMENT LAND SHOULD BE RESISTED

Within the context of City and Provincial economic objectives, there is a need to retain virtually all of the currently designated employment land supply and, indeed, to increase the City's supply over the forecast period. Even with the designation of additional employment land in Northwest Brampton, however, there are significant risks that the City's employment targets may not be met within the available employment land base.

This is not the case for residential or commercial land. Preliminary forecasts for the City of Brampton indicate that the community will exceed its previously planned population of 725,000 in 2031, prior to including the increased levels of housing intensification sought by the *Growth Plan*.

The potential supply of residential intensification sites within the City of Brampton is very large, consistent with the experience of most other communities in the GTA. Conversion of employment land is therefore not required to achieve the City's planned residential structure. Major commercial development should be planned to serve the City's broader residential planning objectives, and directed to existing nodes and intensification corridors, consistent with new Provincial policy directions.

To this end, several policy directions are suggested to resist the conversion of employment land, as discussed in more detail in the following sections.

1. Policies Should Unequivocally Establish the Role of Employment Land in Economic Development

A separate section describing the importance of employment land and the rationale for retaining the vast majority of the employment land supply is recommended for inclusion in the new official plan. This could take the form of a refinement of the objectives in Section 2.3, *Economic Factors and the Role of Brampton*, to reinforce the need and key role that employment land plays in the economy, including:

- The need to provide a variety of employment land opportunities, including the importance of maintaining the ongoing health and integrity of the existing land and building supply;

Providing a variety of employment land opportunities includes both large and small areas, old and new areas and even some scattered industrial sites outside of the major employment areas which also play a valuable economic role in the community;

- As a related matter, the explicit recognition that maintaining a land base is an important objective in itself and is not just a means to achieve a particular employment target (to address common arguments for conversion or under-planning employment land by promises of high employment density on remaining lands); and
- The continuing need for employment land in the "new economy". Technological innovations such as the expansion of the internet, cellular communications and "e-business" have all increased the efficiency of industrial operations but do not seem to be reducing the overall demand for employment land.

It is also suggested that the protection of employment land be specifically addressed as one key element supporting the City's vision for growth. This could take the form of a refinement of Section 2.4.4, *A Dynamic and Prosperous Economy* to specifically indicate that employment land is considered a finite resource within the City and should be retained to support a competitive business environment and promote job growth.

2. No Employment Land Conversion Should Be Allowed; Planned Change Already Has Permissions in Place

Based on the specific “tests” provided in Section 2.2.6.5 of the *Growth Plan*, the amended official plan should contain a specific policy that no employment land conversions will be permitted until such time as the next official plan review.

Existing employment lands in the Urban Growth Centre have already been determined by the City and confirmed as appropriate to change to an alternative use. The official plan already designates these sites as mixed use or residential use.

The *City of Brampton Official Plan* identifies the Central Area as the preferred location for the highest concentration and range of uses within the City, including offices and other employment uses. The Central Area contains the *Urban Growth Centre*, as defined by the Province as part of the *Growth Plan*, which also indicates that the area should be a focus of more intensive development.

According to the City’s employment land inventory, there are approximately 10 net ha of employment land within the UGC. In order to achieve the City’s objectives, and Provincial *Growth Plan* objectives, carefully managed change may be appropriate for the employment land located within this area, as currently contemplated by the City.

Additional change should only be considered within the context of broader City of Brampton and Provincial planning initiatives. In addition, the “Gummed Paper” site, at just over 1 ha, is also considered appropriate for conversion, in accordance with our recommendations in the intensification study that the UGC be expanded to include this area.

Likewise, there are a number of parcels in existing employment uses in scattered locations where change to an alternative use (mixed use or residential) has already been deemed appropriate by previous official plan designations¹. Therefore, all of these 42 employment parcels, totalling 27.8 ha, in either the UGC or scattered sites are not considered conversions within the meaning of the *Planning Act*, PPS or the *Growth Plan*.

Based on our analysis, these parcels are the only parcels in industrial-type employment use in the City where a change in use is appropriate at this time. No further changes in use — conversions under the *Growth Plan* — are appropriate at this time. Lands currently used for industrial uses in Downtown Brampton have already been redesignated for mixed use in the secondary plan and a gradual phasing-out of these uses is anticipated.

¹*These sites do not include the industrial parcels on Rutherford Road and Clark Boulevard and Heart Lake Road, currently designed for mixed use, but are intended to be returned to a pure employment designation.*

3. No Additional Permission for Major Retail Uses Should Be Provided in Employment Areas

The existing *Brampton Official Plan* allows some major retail uses in Business Corridor areas along the arterial road frontages of employment areas. This permission is subject to some tests and some limitations. Under the *Growth Plan*, any additional retail permission, either by extending permissions into Industrial designated areas or by expanding permission within the Business Corridors would constitute an employment land conversion.

Existing retail permissions provide a significant land base on which to meet future retail needs and are largely within the built-up area of the City. The City's long-term retail needs should be planned as part of the residential and commercial structures of the City. Employment Areas should not be planned or relied upon to meet retail shopping needs of the growing population.

As result, it is recommended to maintain the current retail policies affecting employment lands and not to consider any conversions of employment land to provide for further retail opportunities:

- Section 4.3.1.4 allows for the consideration of conversion to mixed use or residential uses in Business Corridors when they are “within or at the edge of large Residential designation areas.” In general, our view of conversions would suggest the removal of this section entirely.

However, there may be a limited purpose to this section to allow the “detailing” of exact land use boundaries in Bram East and in Bram West on Mississauga Road, north of Steeles Avenue. In any other location in the City, in our view, such a conversion of Business Corridor lands would be detrimental to the integrity of major employment areas. If the limited purpose above is the intention, this may be addressed either through the interpretation sections of the plan or through a revision to 4.3.1.4 to be a more specific declaration of the intent and application of the section.

- Section 4.3.2.16 of the official plan states that conversion of lands designated *Industrial* shall only be permitted based on a comprehensive review in accordance with the Provincial Policy statement. Two revisions are suggested to this policy.

Firstly, the policy should be revised to include a specific reference to the policies in the *Growth Plan* which are stronger and clearer than the PPS. In particular, the PPS does not specifically indicate that Major Retail is considered a non-employment uses for the purposes of the conversion policies.

Secondly, and consistent with the recommendations of this study, the policy should also be revised to read that conversions of lands designated *Industrial* shall **not** be permitted, except where demonstrated to be necessary through a comprehensive review.

Existing commercial uses within employment areas should be maintained as part of the employment land supply and not converted. While the *Growth Plan* restrictions on Major Retail uses in *Employment Areas* do not apply to pre-existing approvals, existing development permissions should largely retain their status. Future conversions, however, including expansions of existing facilities, should be resisted.

4. Conversion Policies in Secondary Plans for Major Employment Areas Must Be Strengthened

Like most municipalities, Brampton’s Secondary Plans have been created over many years, under evolving primary official plans and evolving Regional and Provincial policies. More recent plans include objectives for industrial employment lands although few have policies explicitly addressing conversion.

Strengthening the policy against conversion in the Part 1 Plan and providing criteria for development review would allow Secondary Plans to refer to the Part 1 Plan for overall guidance. In some cases, Secondary Plans should be amended to include objectives discouraging applications for conversion and encouraging reoccupation and redevelopment of older buildings by different sectors of the economy. New investment can only be encouraged by assurance that long-term employment use in the area is supported by the City.

In particular, the secondary plan for the Vales North Area will likely require strong policies to implement a mix of employment uses that is being contemplated, given the strong market interest for large-format retail uses over others:

- Previous work undertaken for the Vales North Area recommended a preferred land use concept made up of a mix of employment, commercial retail and institutional uses.¹ The preferred land use concept was based on the unique local characteristics of the Vales North Area, including a rapidly growing nearby population and employment base, an emerging business park in Caledon, the role of key transportation corridors such as Airport and Mayfield Roads, and the opportunity to build on existing uses and natural features of the area.
- According to the market analysis prepared as part of the land use study, a wide range of employment uses is likely to find the area attractive, including small-scale light industrial uses, population-service office uses, institutional uses, local retail and service commercial uses and institutional uses.
- Similar to the risks of approving “blended” employment designations — that is, that only the components of the blend for which there is strongest market demand will actually be developed — there is likely to be pressure to shift or expand the retail components of the Vales North Secondary Plan to accommodate large-format retail uses.
- In the development of the Vales North Secondary Plan, the City of Brampton should seek to include clear and strong language to the effect that the small, local-serving character of the plan is maintained.

¹For details, see the Vales North Special Study Area Land Use Study, January 2008.

5. Guidelines for Conversion Need to Be Included in Secondary Plans for the Urban Growth Centre

The UGC is intended to be the focus of intensification in Brampton over the long term. The policy framework in the Secondary Plans for Downtown Brampton and the Queen Street Corridor (which together represent much of the UGC) already reflects the City's ongoing support of the transition of this area from small town to major urban downtown in the case of the "Four Corners" and from a largely highway commercial strip to a more pedestrian-oriented urban neighbourhood along Queen Street.

The priority for the vast majority of uses should be the transition to more urban uses, including higher-density residential uses. There are, however, some areas where a continued employment focus should be retained.

- To the southwest of Highway 410 and Queen Street, the retention and support of existing employment uses should be confirmed. As a result of ongoing study of the Queen Street Corridor, consideration should be given to the redesignation of lands currently in Mixed-Use to Industrial where they are sufficiently removed from the future revitalization of Queen Street and are suitable for reinvestment in industrial-type use.
- Generally, these are the lands within the Central Area fronting Heart Lake Road, Clark Boulevard and Rutherford Road, south of the retail properties near Queen Street.

- The Peel Memorial Hospital site is a significant opportunity for revitalization with employment uses, and redesignation away from Institutional use to Residential should be discouraged. The City of Brampton has a clear stated interest in maintaining a medical facility on the site and providing for new employment uses, potentially of a related medical nature.
- However, should the Province choose to not proceed with a new hospital in this location, there is the opportunity to accommodate other more intensive employment forms at this location, particularly offices. Provincial ownership of the site provides an opportunity for the Province to take a significant initiative to establish employment growth within the UGC in accordance with the *Growth Plan's* policies.

6. The Boundary of the Urban Growth Centre Should Be Maintained

The Urban Growth Centre is intended to be the focus for intensification and revitalization within the built-up area. At the edge of the UGC, however, it may be attractive to the development community to propose the conversion of employment lands to residential and to propose the inclusion of these lands in the UGC:

- Lands in the northwest corner of the Downtown Brampton area are just outside of the UGC and may well be proposed in the future for conversion. For now, these lands remain useful occupied employment lands and, like other employment lands, the change should be resisted.

- Once redevelopment is underway on the eastern portions of Queen Street within the UGC, there will likely begin to be pressure for conversion at the interface between the UGC and the Central Area employment lands to the south (Rutherford Road and Clark Boulevard). Clear policies need to be included in applicable secondary plans to hold this line both to confirm the location of the boundary and to insert criteria for development review where conversions may be proposed in the long term.
- Expansion of the UGC need only be considered in the very long term, once existing potential in the UGC is largely consumed by new development. For the current period, however, no expansion of the UGC is recommended.

As discussed in Chapter III, directing major office uses to the Urban Growth Centre will be a challenge. The potential capacity for major office development vastly exceeds any reasonable estimate of future demand.

Currently, the applicable secondary plan policies address the transition of existing industrial uses within the area to higher-order employment uses, but do not specifically address major offices. The City may wish to consider the development of new policies that indicate a clear desire to encourage major offices in the Urban Growth Centre, consistent with both the City's objectives and Provincial *Growth Plan* requirements to focus offices in such locations. Maintaining the boundary of the City's Urban Growth Centre is the first step towards encouraging a concentration of these uses over time.

7. Applications to Permit “Blended” Commercial or Residential Permissions Should Be Refused

Conversion of employment lands, whether within industrial-type employment areas or office nodes, is not recommended by this study. While some redistribution of permitted employment uses may be required to meet specific opportunities, the overall amount of land in hectares should not be reduced.

The introduction of non-employment uses in the form of blended designation, such as “live–work” or “mixed retail and office” should not be permitted. This type of conversion of areas designated for industrial and office employment erodes the City's competitiveness over the long term, particularly in two of the City's most desirable locations, the Bram East and Bram West designated employment areas:

- The Bram East Secondary Planning area covers the rapidly-changing eastern edge the City abutting the City of Vaughan along Highway 10. At the southwest corner of the major intersection of Queen Street East and Highway 50, a conversion of employment lands from Office Node to Mixed Use Commercial/Industrial was approved by Council in 2008.
- Given the location of this site associated with a major transit intersection, a mix of uses is perhaps appropriate. Staff agreed to blend permitted uses across the site because market conditions have not been favourable to major office users here.

- A significant component of the site is to be reserved for office uses, as well as industrial-type development; however, the timing of development will certainly favour commercial uses in the short term.
- Notwithstanding past decisions, in the future the City should actively seek to resist additional amendments within these lands that would reduce or eliminate remaining office or industrial designations. Building upon *Growth Plan* directions to restrict conversions of employment land to Major Retail uses, future applications of this type should be refused.
- Similarly, further north, in the vicinity of the intersection of Highway 50 and Clarkway Drive, a conversion has been recently approved by Council (September 2008) which allows residential uses in a Mixed Industrial–Commercial development with the resultant loss of potential employment land. This type of application should also not be supported in the future.
- Similarly, an application has been submitted for a mixed-use approach in the northeast corner of Mississauga Road and Steeles Avenue in the Bram West Employment District, which is planned to be a major office gateway to the City. It is clear, even early on in the planning process for Northwest Brampton, that there is a significant interest from the development community to provide retail and commercial and residential uses in forms that are argued to be flexible to accommodating employment when the market is ready.

In the case of Bram West, the proposal is to allow development in higher-density formats and retail commercial uses that will in the long term add to the vitality of the node. In our view, however, it is in the public interest to retain these lands for their intended purpose as a major office location. The timing of development should not be of relevance in the determination of land use designations, as long as a reasonable set of policies is in place.

8. Current Conversion Applications Should Be Refused

In response to applications for conversion of employment land received by the City, two Official Plan Amendments were passed: OPA 93 and OPA6, which together represent the *Interim Growth Management Policies*. A decision on these applications has been deferred until the completion of a Municipal Comprehensive Review, the results of which are described in this report and the *Inventory and Assessment of Intensification Opportunities*.

Based on the suggested policy directions in this report, most of the current applications for conversion should be refused including all applications to convert employment land in the designated employment areas. These policies should include any lands designated for Business Corridor, Industrial and Office Centre:

- The Bram West applications should only be approved where there is no net loss in the area of land designated for employment purposes resulting from the block plan.
- Where some shifting of boundaries is required, this may be acceptable in the interests of flexibility, but, again, only if there is no loss in employment land area. Indeed, if there are opportunities for expansion of employment areas through the block planning process, these opportunities should be seized.
- The Bram West application, in particular, which is proposing live-work units within the designated office area should be refused. While live-work is seen as an attractive mixture of uses in some locations, it remains a residential conversion under a different name. It is a common strategy employed by developers in recent decades in the GTAH and one that the City should avoid.
- Notwithstanding the Council-adopted plan for Bram West which permits a limited number of live-work units, in our view, this type of development should be significantly limited. If the applicants are of the view that there is a sufficient office market demand for their proposed office space, the City of Brampton should take the view that this in itself indicates the attractiveness of the site and location for higher-density employment development.

- If Brampton chooses or is forced to approve the application, the minimum requirement should be that the employment component or office space is built in advance of or conjunction with any residential development.

Given the key role that employment land will play in achieving City-wide, Regional and Provincial economic objectives, strong policies are required including a high test for conversion application. A high test for conversion does not place a disproportionate value on employment land, because the City of Brampton has already balanced the importance of various land uses in the current official plan and evolving growth management work.

A high test for conversion simply addresses emerging pressure which threatens that balance, and implements new Provincial policies by minimizing conversions. Resulting from the comprehensive review of employment land, the key policy position in the new official plan should be that no conversion should be permitted, except in selected locations to achieve site-specific objectives.

V CONCLUSIONS

In order to accommodate future employment growth and achieve the Provincial vision for growth, the City of Brampton will need to retain virtually all of the currently designated employment land supply and designate additional supply in Northwest Brampton. Even with such additional employment land designations, however, the City may still not be able to capitalize fully on future opportunities.

In order to address this situation, an integrated policy approach is required to promote an increased efficiency in land use, both for existing areas and on the new employment land development. Investment in infrastructure and financial incentives will be required to promote employment intensification and to move towards the *Growth Plan* density targets for new greenfield areas.

Some guidelines for the location of community uses in employment areas should also be developed, recognizing the growing pressure for this type of development. Additional restrictions or new policies may be required to direct, restrict or concentrate community uses, including Places of Worship, in a way that minimizes disruptions to existing and future industrial-type use and that is well-planned and integrated into the surrounding areas.

From a planning perspective, there is a need to retain virtually the entire supply of employment land in an employment land designation. There is little need to convert employment land to achieve the City's planned residential structure. Future commercial needs should be planned to complement the City's residential objectives and advance Provincial objectives to focus development in nodes and corridors.

Given that the City of Brampton is planning for its eventual build-out, a strong policy position on employment land retention is required. The overall employment land supply is finite, taking into account both what is developed today and what is to be developed in the future. Protecting both the occupied and vacant land supply will be critical to achieving the City's, Regional and Provincial economic objectives.

The City of Brampton has the opportunity to develop proactive policies in all areas of employment land retention and designation, employment land density, and employment land conversion. We hope that the information that has been presented in this discussion paper is of assistance, and now look forward to receiving input from both the public and other interested stakeholders on the key policy directions that have been suggested.