

Growth Management Strategy: Growth Analysis and Urban Land Needs Report: Phases 1 & 2

Town of Orangeville

Draft Report

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List of Acronyms and Abbreviations

A.R.U.	Additional residential unit
B.U.A.	Built-up Area
C.M.A.	Census Metropolitan Area
D.G.A.	Designated Greenfield Area
G.D.P.	Gross domestic product
G.G.H.	Greater Golden Horseshoe
G.T.H.A.	Greater Toronto and Hamilton Area
G.M.S.	Growth Management Strategy
G.I.S.	Geographic information systems
L.Q.	Location quotients
M.C.R.	Municipal Comprehensive Review
N.P.R.	Non-permanent resident
O.P.	Official Plan
O.P.A.	Official Plan Amendment
O.P.R.	Official Plan Review
P.M.G.	Projection Methodology Guideline
P.U.U.	Persons per unit
U.S.	United States



Executive Summary

Introduction

In 2025, the Town of Orangeville retained Watson & Associates Economists Ltd. and J.L. Richards & Associates Limited to prepare a long-term Growth Management Strategy (G.M.S.). A core objective of this G.M.S. is to establish a unified vision to guide how and where the Town should grow, ensuring Orangeville continues to evolve and mature as a complete, competitive, and sustainable community. This study will form a foundation for the Town's upcoming Official Plan Review (O.P.R.), providing key technical updates and local planning policy recommendations as directed under the Provincial Planning Statement, 2024 (P.P.S., 2024).

While Orangeville has experienced steady population, housing, and employment growth, driven largely by outward pressure from the Greater Toronto and Hamilton Area (G.T.H.A.) and its role as an urban centre in Dufferin County, future growth is constrained by limited water and wastewater capacity, a finite greenfield land supply, and available intensification opportunities. Accommodating future development in new greenfield areas will require expanding the Town's corporate boundary. This involves inter-municipal negotiations, technical studies, infrastructure planning and construction, development approvals, and ultimately building and occupying new development, typically a process spanning more than a decade. Given the complexity of cross-jurisdictional servicing, land supply, phasing, and approvals, the Town is encouraged to take a proactive approach and adopt a 50-year planning horizon for this G.M.S.

This G.M.S. is organized into five phases. Phases 1 and 2 update the Town's population, housing, and employment forecasts, assess residential and non-residential land needs, and identify potential locations for future corporate boundary expansion. This report summarizes the findings of Phases 1 and 2.

Phases 3, 4, and 5 will qualitatively evaluate the three boundary expansion options using criteria related to land use planning, market conditions, infrastructure, natural heritage, and municipal finance. A detailed infrastructure and fiscal assessment of the preferred option will follow, along with a comparison of the preferred expansion scenario to a constrained scenario without additional servicing or land supply. A final report will summarize the results of Phases 3 to 5.



Exploring Long-Term Scenarios for Population and Employment Growth for the Town of Orangeville

As discussed throughout this report, the G.T.H.A. and surrounding municipalities within the Greater Golden Horseshoe (G.G.H.) Outer Ring represents a key center of economic activity in Ontario as well as in Canada. This broad region of Ontario also represents a large portion of the commuter-shed for the Town of Orangeville. Potential employment opportunities within the Town and its surrounding commuter-shed are a key factor driving net migration and housing growth in the Town and the broader region.

With the onset of the COVID-19 pandemic, housing demand accelerated in the Town of Orangeville and more broadly across the G.G.H. Outer Ring, Southwestern and Eastern Ontario. This growth acceleration has been largely fueled by eroding housing affordability in the G.T.H.A., changing work patterns (namely increased opportunities for hybrid/remote work), and employment growth more broadly across Southern Ontario following a gradual recovery from the 2008/2009 global economic downturn. While this acceleration has moderated since 2023, the anticipated long-term pace for population and employment growth in Southern Ontario outside the G.T.H.A. remains elevated in accordance with the most recent Ontario Ministry of Finance (M.O.F.) long-term population projections. While broader net migration patterns will continue to influence the pace of long-term population growth across the Province's sub-regions, local development conditions ultimately dictate how development pressures are accommodated at the municipal or settlement area level.

Municipal water and wastewater servicing capacity represents an important factor which directly impacts the amount of future growth that a specific municipality or settlement area can accommodate. Looking forward, the long-term population, housing, and employment growth outlook for Orangeville has been considered within the context of the availability of existing municipal water and wastewater servicing capacity and potential long-term solutions to overcome these identified constraints. The availability of vacant designated land is also a key factor influencing the amount and type of future development. The Town has a finite and diminishing urban land supply within its corporate boundary to accommodate new development, which is discussed in this report.



Considering these identified local development constraints and the Town's ultimate long-term growth potential within the context of the regional trends previously identified, two long-term population and employment scenarios are explored for the Town of Orangeville as part of this G.M.S. This includes:

- **Scenario 1 – Constrained: Growth Scenario:** reflects currently available water and wastewater servicing capacity and potential residential and non-residential supply within the Town's corporate boundary. Urban land opportunities include vacant greenfield lands designated for residential and non-residential development as well as intensification (i.e. infill and redevelopment). Based on discussions with Town staff, existing municipal water and wastewater systems are estimated to have a servicing capacity of up to 36,500 people.

Under the Constrained Scenario, the employment base for the Town is forecast to increase by 2,200 employees, reaching 16,900 total jobs by 2045. The employment activity rate (ratio of jobs to population) is forecast to remain stable at 46%, suggesting the Town's population and employment is forecast to grow at a similar rate.

- **Scenario 2 – Expansion Scenario:** assumes that the Town attracts and accommodates a proportionate share of County-wide and G.G.H. population and employment growth over the long term. Under this scenario it is assumed that local municipal water and wastewater servicing constraints and urban land requirement to accommodate anticipated future growth are overcome by 2041 and addressed throughout the long-term planning horizon.

Under the Expansion Scenario, Orangeville's employment is forecast to increase by 7,100 jobs, reaching 21,800 total jobs by 2076. The employment activity rate is forecast to increase from 46% in 2025 to 49% in 2076. This suggests the Town's employment is forecast to grow at a slightly faster pace than its population, driven by export-based employment opportunities that can be accommodated in new Employment Areas established and other employment-generating lands during the post-2041 period.

It is recognized that any long-term growth scenario for Orangeville will require the Town to consider long-term municipal servicing solutions and adjustments to its corporate boundary. Due to the complexity and anticipated timelines associated with this process, it is important for the Town to consider a long-term planning horizon for expansion beyond the current horizons of the County and Town O.P. Accordingly, Scenario 2 is

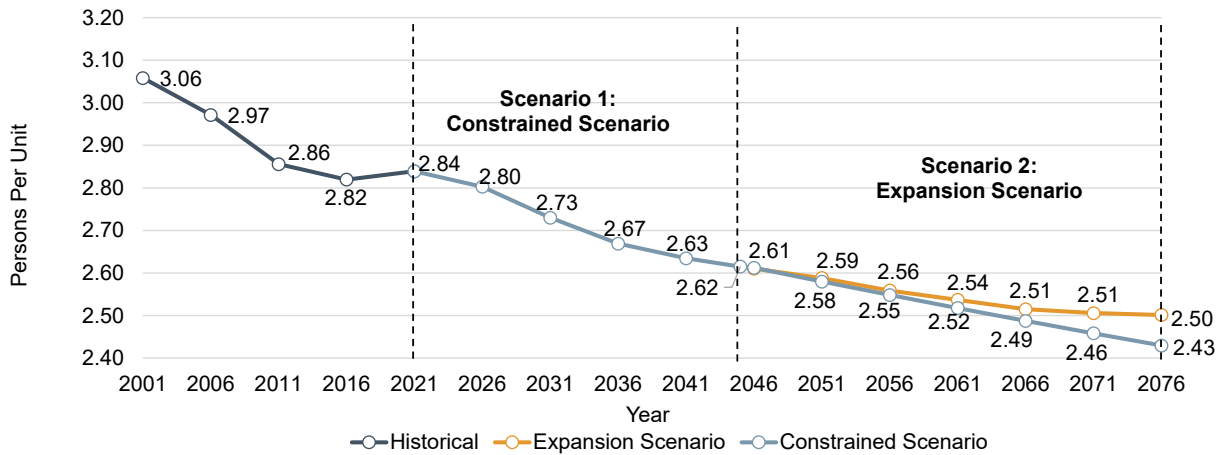


premised on a 50-year planning horizon. Figure ES-1 illustrates the long-term population growth forecast for the Town of Orangeville under the Constrained and Expansion Scenarios. Key findings include:

- Orangeville's population increased at a 0.9% annual growth rate from 2001 to 2021, adding approximately 255 people a year.
- Under the Constrained Scenario (Scenario 1), it is assumed that existing municipal water and wastewater capacity can accommodate up to 36,500 people by approximately 2045. This represents an additional 5,000 people (215 annually) from 2021 to 2045.
- Under this scenario, it is anticipated that the pace of population growth could potentially slow over time as the Town's supply of greenfield land diminishes. Assuming the Town's corporate boundary remains fixed and no further expansions are made to the Town's municipal water and wastewater systems, the Town's population would not exceed 36,500. Under this scenario, the Town's population and employment base would be expected to reach buildout by approximately 2045.
- During the post-2045 period, it is foreseeable that the Town could accommodate a modest level of new high-density housing development through intensification to offset the population decline in existing households to 2076.
- Under the Expansion Scenario (Scenario 2), the Town is forecast to reach 44,800 people by 2076, adding 13,400 persons (245 annually) between 2021 and 2076, at an annual growth rate of 0.6%. This reflects a comparable amount of absolute annual population growth relative to what the Town has experienced over the last two decades.



Figure ES-1
Town of Orangeville
Population Forecast, 2021 to 2076



Note: Population includes net Census undercount and figures have been rounded. Population figures include the net Census Undercount, which is estimated at 3.2%.
Source: Historical 2001 to 2021 data derived from Statistics Canada data, forecast prepared by Watson & Associates Economists Ltd..

Figure ES-2 and ES-3 summarize the long-term annual household forecast by housing structure for Orangeville under the Constrained and Expansion Scenarios. Key findings are as follows:

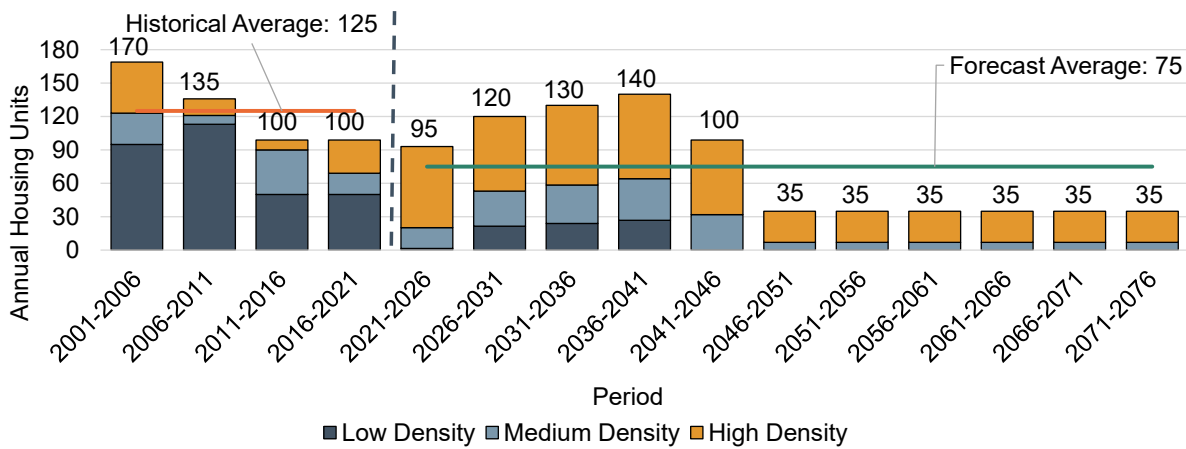
- Under Scenario 1, an additional 2,880 housing units (120 annually) are forecast to accommodate an additional 5,100 persons, bringing the Town’s total population to 36,500. Under this scenario, limited opportunities exist for new low-density housing (i.e. single and semi-detached) in greenfield areas. As such, low-density housing forms comprise only 13% of housing growth between 2021 to buildout. Medium-density housing (townhouses, duplexes and back-to-back townhouses) represent 26% of housing, while high-density housing (stacked townhouses and all other apartments) make up approximately 60% of forecast housing growth from 2021 to 2045.
- Under the Constrained Scenario, it is foreseeable that the Town would add a modest number of additional housing units, predominantly in high-density forms, including additional residential units (A.R.U.s), to maintain a population of 36,500 after 2045. The demographic modelling that supports the growth scenarios provided herein indicates that approximately 35 new high-density/A.R.U. housing



units could be accommodated annually from 2045 to 2076 without exceeding the Town’s current municipal servicing capacity limit of 36,500.^[1]

- Under Scenario 2, the Town is forecast to grow by 6,850 housing units (125 annually) from 2021 to 2076. Under the Expansion Scenario, it is assumed that a Corporate Boundary expansion would be required prior to 2041 to provide opportunities for new low-density and medium-density housing in greenfield areas. Under this scenario, new housing development is forecast to comprise 27% low-density, 27% medium-density, and 46% high-density units.

Figure ES-2
Town of Orangeville
Constrained Scenario: Housing by Structure Type, 2001 to 2076



Notes:

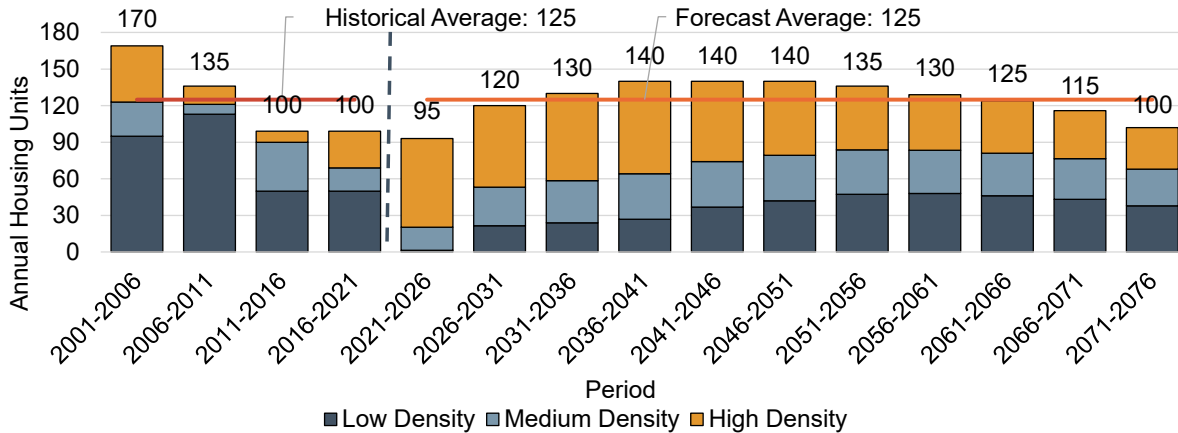
- Low-density housing includes single detached and semi-detached units.
- Medium-density housing includes townhouses and apartments in duplexes.
- High-density housing includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, including stacked townhouses.

Source: Historical 2001 to 2021 data derived from Statistics Canada Census data. Forecast prepared by Watson & Associates economists Ltd.

^[1] A housing unit mix of 20% medium-density and 80% high-density units from 2045 to 2076 is assumed to sustain a population of 36,500, which is tied existing water and wastewater servicing capacity potential.



Figure ES-3
Town of Orangeville
Expansion Scenario: Housing by Structure Type, 2001 to 2076



Notes:

- Low-density housing includes single detached and semi-detached units.
- Medium-density housing includes townhouses and apartments in duplexes.
- High-density housing includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, including stacked townhouses.

Source: Historical 2001 to 2021 data derived from Statistics Canada Census data. Forecast prepared by Watson & Associates economists Ltd.

Urban Land Need Assessment

The P.P.S., 2024 requires that municipalities provide sufficient lands to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of at least 20 years, but not more than 30 years, informed by provincial guidance. The P.P.S., 2024 further identifies that when planning for Employment Areas, land requirements can extend beyond the 30-year horizon. This G.M.S. follows this provincial planning policy direction and extends this land needs assessment over a 50-year period, as previously noted.

Over the 30-year period, the Town is forecast to require approximately 119 hectares of additional land to accommodate future housing and employment growth. This includes 37 hectares for residential uses, 26 hectares for commercial and institutional uses, and a combined total of 63 hectares for all Community Area needs. Employment Area lands account for a further 56 hectares, reflecting the long-term need to support industrial and export industry growth.



Over the 50-year horizon, total land needs are forecast to increase to 317 hectares. Residential land requirements rise to 135 hectares, while commercial and institutional needs increase to 65 hectares, resulting in a total Community Area need of 200 hectares. Employment Area land needs also increase substantially to 117 hectares, consistent with forecast employment growth and the need to ensure a stable long-term supply of industrial land to compete regionally.

Figure ES-4
Town of Orangeville
Land Needs Requirements – 30-Year and 50-Year

Land Needs	30-Year Land Needs	50-Year Land Needs
Residential Land Needs (hectares)	37	135
Commercial and Institutional Land Needs (hectares)	26	65
Sub-Total Community Area (hectares)	63	200
Employment Area Land Needs (hectares)	56	117
Total Land Needs (hectares)	119	317

Note: All figures are in gross developable hectares.
Source: Watson & Associates Economists Ltd., 2026.

As the Town advances to the next phase of work, an important focus will be on identifying and evaluating opportunities to accommodate long-term residential, commercial, institutional, and Employment Area land needs. This will require assessing potential locations that can support a well-balanced and complete community structure while ensuring a robust supply of land for future economic growth. In particular, identifying sites with sufficient size, servicing capacity, and access to the regional transportation network will be critical for establishing Employment Areas with the critical mass needed to attract investment and remain competitive within the regional economy. A strategically planned and cohesive Employment Area will help support targeted industrial sectors, reinforce Orangeville's economic role in the region and ensure the Town is well-positioned to meet future growth demands.



Location Options for Corporate Boundary Expansion

As part of this G.M.S., the Consultant Team has explored preliminary opportunities to expand Orangeville's corporate boundary in all directions. This initial review found that expansion to the north and east into the Town of Mono is significantly constrained by key environmental features, a lack of major transportation routes, and the presence of established urbanized areas such as Purple Hill. To the south, within the Town of Caledon, the provincial Greenbelt imposes substantial constraints on the potential configuration of the gross developable land area. In contrast, areas to the west, within the Townships of Amaranth and East Garafraxa, contain large, contiguous land blocks with fewer environmental constraints, offering greater flexibility in configuring the gross developable area.

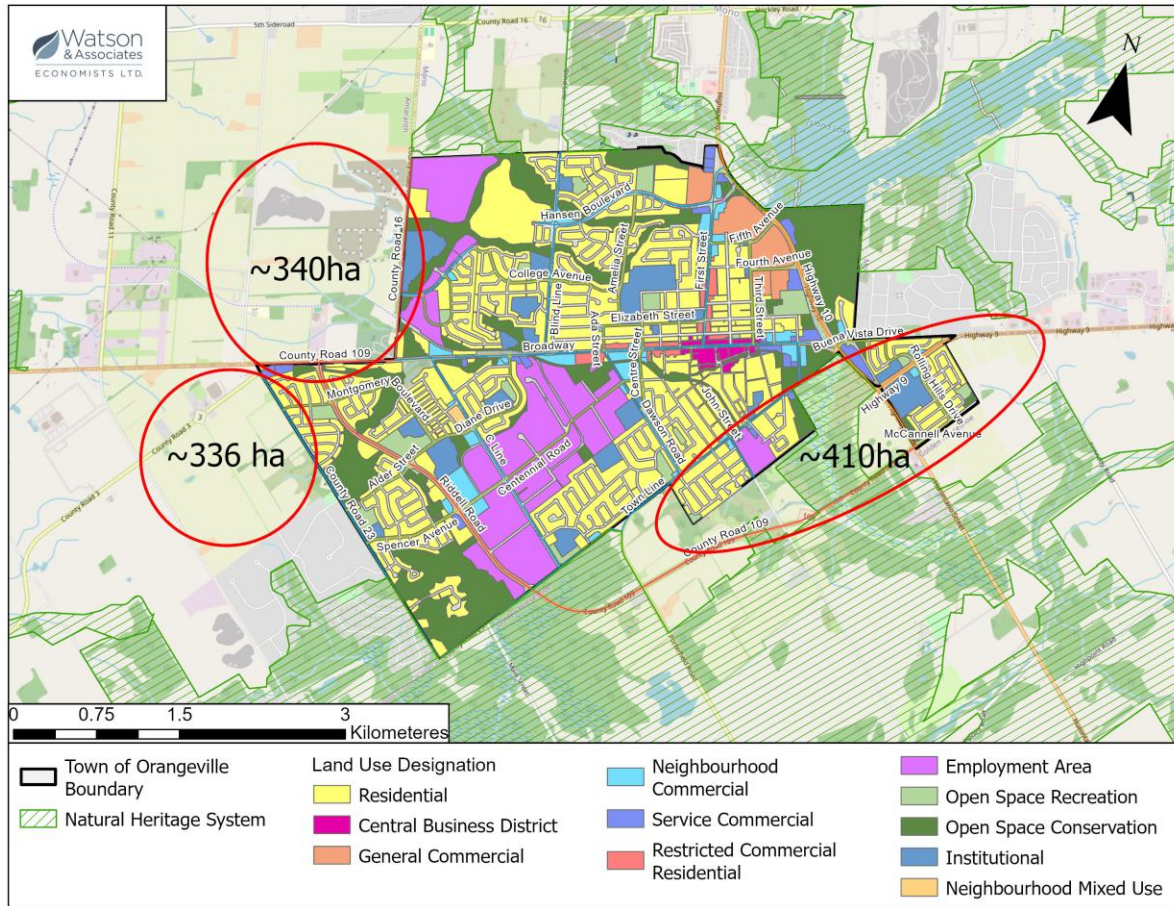
The Consultant Team has identified three Study Areas, with individual Study Areas ranging from 336 to 410 gross developable hectares. It is important to note that each Study Area exceeds the minimum requirement of 317 gross developable hectares needed to accommodate growth over a 50-year horizon. As a result, the Study Areas each provide ample land supply and an appropriate level of contingency to support long-term planning needs. The Study Areas include the following, with directional estimates of gross developable land area, which will be further reviewed.

- Study Area 1 (Caledon): up to 410 hectares
- Study Area 2 (Amaranth): up to 340 hectares
- Study Area 3 (East Garafraxa): up to 336 hectares

Each Study Area is influenced to varying degrees by Natural Heritage System features, which affect the gross developable land base and overall expansion potential. It is important to note that the land areas referenced above represent gross developable area, which excludes identified environmental features. As part of any annexation process, it is recommended that the Town also incorporate environmental features that may separate or fragment gross developable areas to ensure a contiguous municipal boundary. The next step in the G.M.S. will involve delineating the Study Areas using an appropriate configuration. Furthermore, the G.M.S. will involve a comprehensive evaluation of the Study Areas using a range of criteria, including market conditions, planning considerations, environmental constraints, and infrastructure requirements. Figure E-5 provides a map of the Study Areas.



Figure E-5
Potential Expansion Study Areas



Next Steps

The next phases of this G.M.S. will focus on developing a comprehensive evaluation framework with a series of criteria to guide the assessment of three Study Areas. Using this framework, the Consultant Team will undertake a detailed analysis to evaluate the relative merits, opportunities, and constraints of each Study Area from market, land-use planning, infrastructure, agricultural, and environmental perspectives. This assessment will provide the basis for identifying the most suitable location for future municipal boundary expansion to be further explored in more detail.

The preferred Study Area will be further examined in greater depth through additional technical analyses. This will include a review of municipal financial implications, infrastructure servicing requirements, and land-use planning considerations to ensure



that the preferred expansion area is both feasible and supportive of the Town's long-term growth objectives. These detailed assessments will provide the foundation for informed decision-making as Orangeville advances toward a recommended corporate boundary expansion process.



1. Introduction

1.1 Background

In 2025, the Town of Orangeville retained Watson & Associates Economists Ltd. (Watson) and J.L. Richards & Associates Limited (J.L.R.), hereinafter referred to as the Consultant Team, to prepare a long-term Growth Management Strategy (G.M.S.). A G.M.S. establishes a long-term cohesive vision for a municipality, which provides direction and policies which influence how and where growth and/or change should occur. Such planning and economic policies are required to ensure that municipalities such as Orangeville continue to grow as complete, vibrant and competitive communities while continuing to mature and evolve in a sustainable manner from a financial, environmental, and socio-economic standpoint.

This strategy will form a foundation document to the Town's Official Plan Review (O.P.R.) process, which is scheduled to commence in 2026. Over the past several decades, the Town of Orangeville has experienced steady population, housing and employment growth, largely driven by outward growth pressures from the Greater Toronto Hamilton Area (G.T.H.A.) combined with the Town's role as an urban centre within Dufferin County. It is recognized, however, that the extent of future urban development within the Town of Orangeville is ultimately limited to the capacity of the Town's municipal water supply, wastewater treatment capacity, and the supply of vacant, designated greenfield lands and intensification opportunities to accommodate new residential and non-residential development.

It is recognized that accommodating new urban development in future greenfield areas will require an expansion to the Town's corporate boundary. This process will require an extensive timeline to allow for communications and negotiations with one or more of the Town's municipal neighbours; the preparation of studies (e.g. infrastructure, municipal services, and local planning); construction of infrastructure; development planning and approvals, housing and non-residential building construction and development occupancy. Typically, this combined process can take a period of over a decade before new development is approved and ultimately occupied. Accordingly, it is important for the Town to take a proactive approach to this process while also adopting a long-term perspective regarding its role as an urban centre within Dufferin County. Given the complexities surrounding the corporate boundary expansion process, as it relates to



cross-jurisdictional issues, infrastructure municipal service needs, urban land requirements, phasing, development approvals and construction, it is recommended that the Town adopt a 50-year planning horizon for the purpose of this G.M.S.

1.2 Reporting Structure

This G.M.S. has been organized into five phases. The key objectives of Phases 1 and 2 are to update the population, housing, and employment forecast for the Town of Orangeville, conduct an urban residential and non-residential land needs analysis and provide location options for future corporate boundary expansion that best accommodate forecast demand for urban development over the long-term planning horizon. This report, as provided herein, summarizes the results of Phases 1 and 2.

As part of Phases 3, 4 and 5, the Consultant Team will then prepare a qualitative evaluation of the three corporation boundary expansion location options based on criteria related to land use planning, real estate market considerations, infrastructure, natural heritage and municipal finance. A more detailed assessment of the preferred corporation boundary expansion option will be provided from an infrastructure and fiscal impact perspective. Lastly, the fiscal impacts of the preferred expansion scenario will be compared against the constrained scenario in which expansions to municipal servicing capacity and urban land supply are not addressed. A second and final report will be provided to summarize the findings of Phases 3, 4 and 5.

2. Policy Context

2.1 The Provincial Policy Context

On August 20, 2024, the Province released a new Provincial Planning Statement (P.P.S.), which came into effect on October 20, 2024.^[1] The P.P.S., 2024 was released in coordination with Bill 185, *Cutting Red Tape to Build More Homes Act*. The P.P.S., 2024, provides key policy direction relevant to this study, particularly related to planning for population, housing and employment growth, as well as planning for settlement area boundary expansions (S.A.B.E).

^[1] <https://ero.ontario.ca/notice/019-8462>.



On August 11, 2025, the Province released a proposed Provincial Projection Methodology Guideline (P.M.G.) document to support the implementation of the P.P.S., 2024. The proposed P.M.G. provides prescriptive steps regarding the technical approach to carrying out long-range population and housing forecasts and land needs assessments, which have been considered as part of this review. Once finalized, the P.M.G. document would replace the existing P.M.G. released in 1995. According to the Province, the P.M.G. is meant to support policy implementation but cannot add to or detract from the policies of the P.P.S., 2024.^[1]

The growth forecast and Urban Land Needs Assessment methodology in this study are consistent with and adhere to the P.P.S., 2024, and proposed P.M.G. Key provincial planning policies for assessing long-term urban growth and urban land requirements related to this study are provided in Appendix A, Policy Context.

2.2 Dufferin County – Growth Management Policy Context

The County of Dufferin Official Plan (O.P.) (August 2025) provides over-arching policy direction to guide the County and local municipalities on growth management and land use planning matters. On October 9, 2024, the Ministry of Municipal Affairs and Housing approved with modification Official Plan Amendment No. 2 (O.P.A. 2) in accordance with the *Planning Act*. This amendment established the planning framework in the County O.P. to accommodate the Dufferin County population and employment growth forecast to 2051.^[2] O.P.A. 2 also sets intensification targets and allocates residential, commercial, and employment land needs for the County's lower-tier municipalities.

Chapter 3 of the County O.P. addresses growth management policies. According to the growth forecasts set in subsection 3.2.1 of the County O.P., Dufferin County is forecast to grow to 100,700 people and 40,900 jobs by 2051, representing an increase of about 47% and 64%, respectively, between 2021 and 2051. The majority of this growth is to be focused within the Urban Settlement Areas, while moderate growth is to be allocated to the County's Community Settlement Areas.

[1] ERO Posting Notice: <https://ero.ontario.ca/notice/025-0844/>

[2] Notice of Decision with respect to an Official Plan Amendment subsection 17 (34) and section 26 of the *Planning Act*. Official Plan Amendment No. 2 to the County of Dufferin Official Plan as adopted by By-law 2023-25.



According to the County O.P. policies, Dufferin County is responsible for the allocation of growth to the local municipalities and will collaborate and coordinate on integrated planning objectives. According to the County O.P., the Town of Orangeville is forecast to grow to 38,500 people and 21,700 jobs by 2051, representing approximately 24% and 48% of the County's population and employment, respectively, by 2051.

2.3 Town of Orangeville – Local Growth Management Policy Context

The Town of Orangeville O.P. was adopted on October 21, 1985, and has been amended and updated numerous times to its current March 10, 2025, office consolidation version. The Town is currently in the process of reviewing its O.P. to ensure it maintains alignment with provincial policies and implements evolving local planning interests. The existing O.P. identifies a framework of sustainably developing the Town as a vibrant, attractive, safe, complete, and healthy community contributing to an exceptional quality of life. The O.P. recommends a comprehensive framework to direct and manage growth to 2031 based on the population and employment forecasts identified in the document.

Orangeville's urban structure consists of an Urban Area, divided further into the built-up area (B.U.A.)^[1] and the designated greenfield area (D.G.A.)^[2] Key growth management policies in the plan include:

- Encourage a coordinated approach to land use and infrastructure planning between the municipal jurisdictions in the Orangeville Area and promote a clear distinction between urban uses in the Town of Orangeville and the agricultural and rural lands in the surrounding municipalities.
- To plan for growth in appropriate locations to be accommodated both in the B.U.A. and in the D.G.A. As identified in subsection D.9.2.4 of the Town's O.P.:
 - Direct a significant portion of new growth to the B.U.A. through intensification.
 - Build compact and transit-supportive communities in the D.G.A.;

[1] As delineated in Schedule "B1" of the Town of Orangeville Official Plan.

[2] In accordance with the Provincial Planning Statement, 2024, D.G.A. is hereinafter defined as "designated growth area."



- Reduce dependence on the automobile through the development of mixed-use, transit-supportive, pedestrian-friendly urban environment;
- Provide convenient access to public transit; and
- Encourage a diverse mix of land uses, a range and mix of employment and housing types, high-quality public open spaces and easy access to local stores and services throughout the community.
- To meet or, when feasible, exceed provincial and regional minimum density targets and residential intensification targets.
- About half of the growth within the City is to be concentrated in the B.U.A. The O.P. identifies a minimum annual intensification target of 50%.
- Vacant residential lands in Community Areas in the Town have been assigned a minimum density target of 46 people and jobs/hectare.



3. Overview of Macro-Economic and Regional Trends Influencing Growth in Orangeville

The following summarizes the global, national, provincial, and regional economic trends anticipated to continue to influence the population and employment growth outlook for the Town of Orangeville over the coming decades.

3.1 Navigating Increased Uncertainty in a Changing Global and Canadian Economy

After several years of resilient global economic growth following the 2020 and 2021 lockdowns during the coronavirus disease (COVID-19) pandemic, the global economy is now facing a mounting number of near-term economic challenges and geo-political conflicts. These global economic challenges largely relate to unresolved conflicts associated with the ongoing war between Ukraine and Russia; the Israel/Gaza conflict; continued global trade tensions, particularly with the United States (U.S.); increasing government, corporate and consumer debt; and ongoing concerns regarding persistent inflation.

Collectively, these factors have resulted in heightened global economic uncertainty and volatility, which continues to act as a near-term global economic headwind. Following the recent softening of economic growth, the Organisation for Economic Co-operation and Development is predicting stabilizing economic conditions in their global economic forecast for 2026 and 2027.

For manufacturing-focused regions such as Southern Ontario, goods-producing sectors, especially the automotive industry, are being impacted by global disruptions while also undergoing a shift toward advanced technologies such as electric vehicle production. While not a new trend, globalization and technological advancements continue to shift the economic composition of developed economies from goods production toward a service-based economy. Since the onset of the pandemic, this economic shift has increasingly raised fundamental concerns in certain cases regarding national security, economic trade balances and prosperity, prompting countries to adopt protectionist measures when setting out their near- and longer-term national economic strategies.

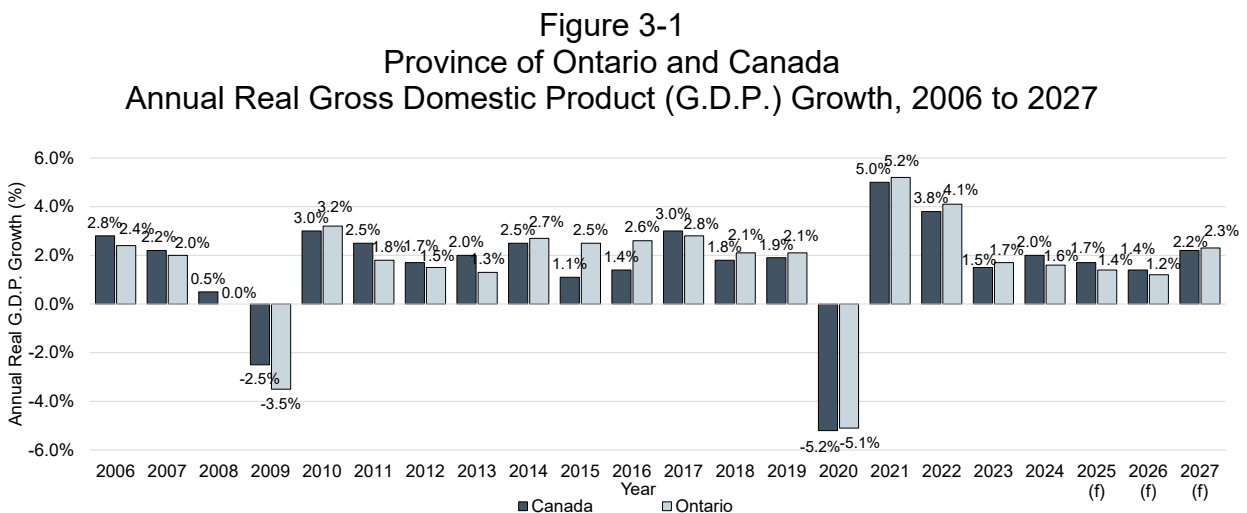
Furthermore, COVID-19 accelerated technological shifts already underway, forcing businesses to rapidly adopt remote-work tools. The evolving integration of artificial



intelligence (AI) is also transforming business operations through improved workflow management with task automation. These disruptions continue to reshape employment patterns across sectors and locations.

These ongoing structural changes and technological disruptions shaping the global economy, combined with rising geo-political and trade tensions, will require that both senior and local governments become increasingly agile and responsive to evolving industry demands and disruptive economic forces, a trend that has been expedited by the COVID-19 pandemic. These revised near-term economic forecasts and ongoing disruptions are anticipated to influence the near-term population and employment growth outlook for Canada, Ontario, the Greater Golden Horseshoe (G.G.H.) and the Town of Orangeville over the coming years.

Considering these broader global and domestic economic trends, BMO Capital Markets has forecast that gross domestic product (G.D.P.) growth will decline to 1.4% in Ontario and 1.7% overall for Canada in 2025. For 2026, an annualized G.D.P. growth rate of 1.2% is forecast for Ontario and 1.4% for all of Canada before increasing to 2.3% and 2.2% respectively (refer to Figure 3-1).^[1]



Note: The years 2025 to 2027 are forecasts by BMO Capital Markets Economics
Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, February 6, 2026, by Watson & Associates Economists Ltd.

As of 2025, rising public sector and household debt remains a major concern in Canada, driven by pandemic-era spending, expansionary fiscal policy, and higher

^[1] Provincial Economic Outlook, BMO Capital Markets, February 6, 2026.



household borrowing tied to living costs and housing prices. While the housing market has cooled relative to the 2022 peak, affordability continues to remain a concern across most regions. As a result, recent interest rate declines are unlikely to notably improve affordability without sustained reductions in home prices and rents. Added to these economic headwinds, the Canadian federal government announced reductions to non-permanent residents (N.P.R.) and new permanent residents in 2024 through their Immigration Levels Plan, which is further detailed in section 3.3

3.1.1 Implications for the Town of Orangeville Population and Employment Growth Outlook

The above-mentioned macro-economic conditions, combined with slower domestic labour force and population growth and a weaker housing market are anticipated to dampen the near-term population, housing and employment growth outlook for the G.G.H., Dufferin County and the Town of Orangeville over the next one to two years. It is important to recognize that the broad economy has, and will continue to, experience regular cycles of expansion and contraction, typically over a five to ten-year period. It is anticipated that Canada, Ontario, Dufferin County, and the Town of Orangeville will experience multiple economic cycles, which is a recognized pattern that is foundational to the Town's long-term growth forecast to 2051. These ongoing structural changes and technological disruptions shaping the global economy, combined with rising geo-political and trade tensions, will require that both senior and local governments are agile and responsive to evolving industry demands and disruptive economic forces, a trend that has been expedited by the COVID-19 pandemic.

3.2 COVID-19 and The Changing Nature of Work

More than five years after COVID-19 was declared a pandemic on March 12, 2020, its impacts remain significant and far-reaching. Beyond broad economic effects, the pandemic accelerated technological changes in work and commerce. Businesses have increasingly adopted remote and hybrid models supported by virtual private networks, virtual meetings, cloud services, artificial intelligence, and other digital tools. These shifts continue to reshape employment patterns by location and sector, directly influencing commercial, institutional, and industrial space needs.

In 2016, about 6% of the Orangeville workforce worked at home full-time; by 2025, this grew to roughly 7%, excluding hybrid workers. In addition to work at home employment,



the share of workers with no fixed place of work (N.F.P.O.W.)^[1] was approximately 16% in 2025. The proportion of full-time and part-time work at home workers, along with N.F.P.O.W. workers, is expected to remain relatively high in Orangeville over the long term, driven by continued growth in knowledge-based employment sectors and continued technological advancement. Recognizing the future impacts of hybrid, remote and off-site work trends is essential when evaluating future non-residential space requirements and long-term urban land needs.

3.3 National and Provincial Immigration Trends

Canada's population has experienced significant growth in recent years. During the recovery period from COVID-19, immigration targets were raised in Canada primarily in response to federal labour force demands. Immigration accounts for almost 100% of Canada's labour force growth and nearly 80% of its population growth. As a result of these increased immigration targets, Canada welcomed 471,800 and 483,600 new permanent residents in 2023 and 2024, respectively. With population growth outpacing G.D.P. growth, G.D.P. per capita has declined to well below pre-pandemic levels.^[2] The key challenges to growth in Canadian G.D.P. per capita include declining labour productivity and a rising unemployment rate for recent immigrants.^[3] In response to these challenges, the federal government has lowered the previous near-term

^[1] Statistics Canada defines N.F.P.O.W. employees as “persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”

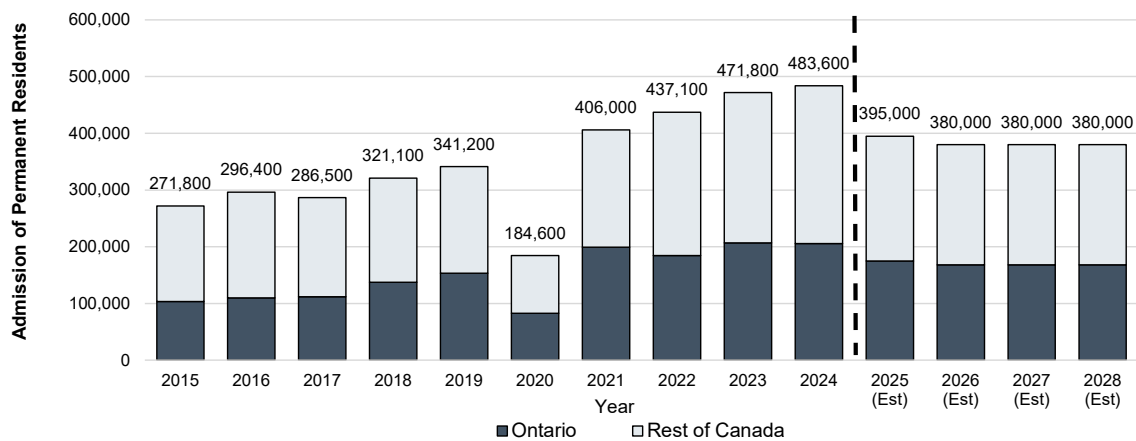
^[2] Statistics Canada, Economic and Social Reports, Canada's Gross Domestic Product Per Capita Perspectives on the Return to the Trend report by Carter McCormack and Weimin Wang, April 24, 2024.

^[3] TD Economic Reports, Canadian Employment (July 2024), Canada's job market softens further in July, published August 9, 2024.



immigration target of 500,000 people per year to 395,000 in 2,025, 380,000 in 2026 to 2028 (refer to Figure 3-2).^{[1].[2]}

Figure 3-2
Admission of Permanent Residents in Ontario and Canada
Historical (2015 to 2024) and Forecast (2025 to 2028)



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

Source: 2015 to 2024 derived from Immigration, Refugees, and Citizenship Canada April 22, 2025, data. 2025 target from the Government of Canada’s Immigration Levels Plan for 2025 to 2027, and 2026 to 2028 target from the Government of Canada’s Immigration Levels Plan for 2026 to 2028, the Ontario target estimated based on the historical share of 44% of the Canadian Permanent Residents Admissions from 2018 to 2024, by Watson & Associates Economists Ltd.

The federal government has also announced that it will reduce the percentage of N.P.R. from 6.8% of the national population to 5.0% by the end of 2026.^[3] These modifications address the changing needs of the country by easing pressures on housing, infrastructure, and social services. These changes are anticipated to have a further downward impact on future population growth in Canada, including Ontario, over the

^[1] Non-permanent residents (N.P.R.) are defined by Statistics Canada as persons from another country who have been legally granted the right to live in Canada on a temporary resident permit, along with members of their family living with them. These residents include foreign workers, foreign students, the humanitarian population, such as refugees, and other temporary residents.

^[2] N.P.R. share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 N.P.R. out of 41,288,599 residents in Canada.

^[3] N.P.R. national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.



next few years.^[1] Based on 2025 data and looking forward through 2026 and beyond, despite the target cuts, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

3.4 Regional Trends Driving Growth in Orangeville

Population and employment growth in the Town of Orangeville is strongly correlated with the growth outlook and competitiveness of the regional economy, which in this case is largely represented by the G.G.H. Potential employment opportunities within the Town and the surrounding commuter-shed, most notably within the G.T.H.A., represent the primary driver of population growth through net migration to the Town of Orangeville.

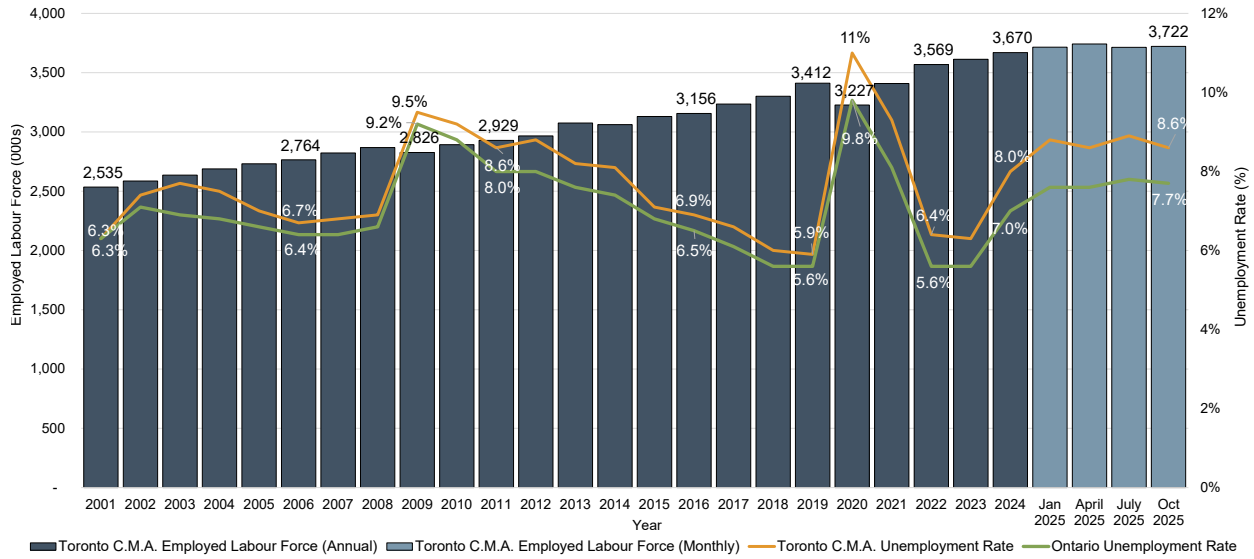
3.4.1 Regional Labour Force Trends

Figure 3-3 summarizes total labour force and unemployment trends for the Toronto Census Metropolitan Area (C.M.A.). Labour force data is not available for Orangeville, but it is captured within the broader C.M.A., which comprises 87% of Orangeville's commuter-shed, as illustrated in Figure 3-4. The total employed labour force within the Toronto C.M.A. has steadily increased over the past 25 years from 2.5 million people in 2001 to 3.7 million as of October 2025. This represents a total employed labour force increase of 1.2 million people and a growth rate of 1.6%. It is important to note that C.M.A. labour force growth has slowed since 2022, while the unemployment rate has moderately increased from a low of 5.9% in 2019 to 8.6 % as of October 2025, due to the economic headwinds discussed in section 3.1.

^[1] Government of Canada News Release, October 24, 2024.
<https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/government-of-canada-reduces-immigration.html>



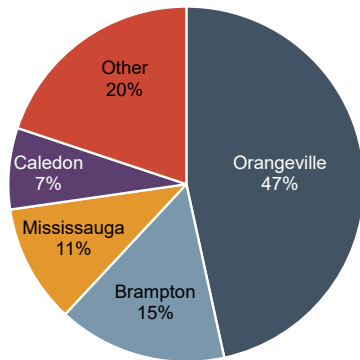
Figure 3-3
Toronto Census Metropolitan Area (C.M.A.)
Labour Force Trends, 2006 to 2025



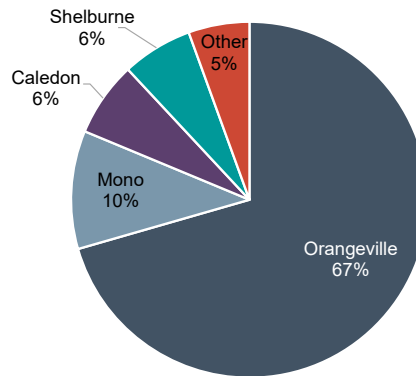
Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
Source: Toronto C.M.A. employed labour force and unemployment rate from Statistics Canada Table 14-10-0096-01, 14-10-0461-01, Table 14-10-0459-01. Province of Ontario unemployment rate from Statistics Canada Table 14-10-0023-01. Derived by Watson & Associates Economists Ltd.

Figure 3-4
Town of Orangeville
Commuting Patterns, 2021

To where Orangeville Residents Commute



From where Orangeville Employees Commute



Source: Derived from Statistics Canada, Table 98-10-0459-01, by Watson & Associates Economists Ltd.

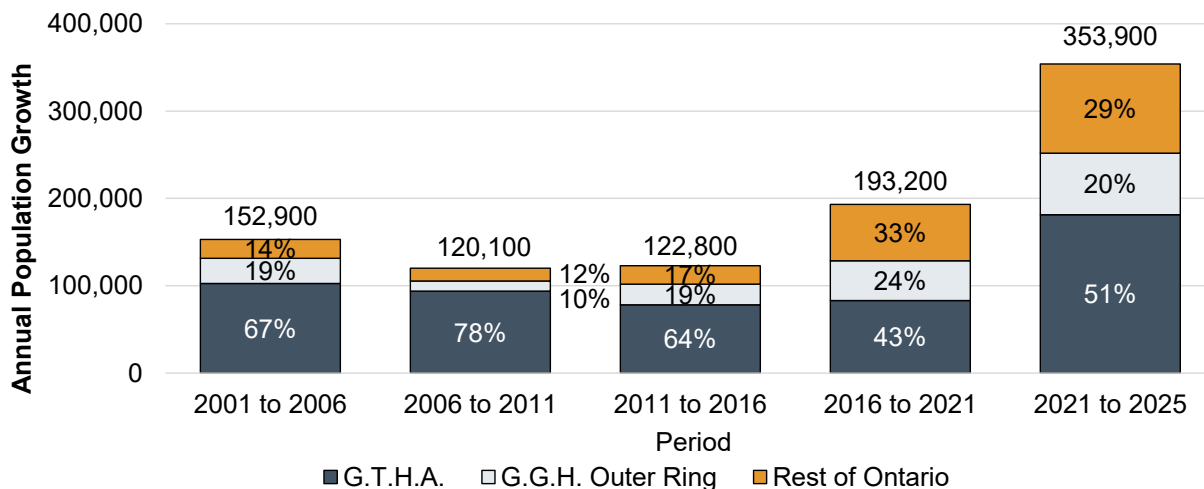


3.4.2 Provincial Population Growth Trends by Sub-Area

Figure 3-5 illustrates the population growth in the Province by sub-regional area. Key observations are as follows:

- The share of provincial population growth occurring outside the G.T.H.A. has increased steadily, rising from 12% (2006 to 2011) to 17% (2011 to 2016) and then to 33% (2016 to 2021).
- The share of provincial population growth in the G.T.H.A. has steadily declined, falling from 78% (2006 to 2011), to 64% (2011 to 2016), and then to 43% (2016 to 2021). The 2021 to 2025 period saw an overall increased share of provincial growth; however, there was a significant decline from 2024 to 2025 relative to the 2021 to 2024 period.
- These historical trends in provincial population growth suggest that while the G.T.H.A. will continue to experience a large share of provincial population growth, this population share is anticipated to continue to shift outward into the G.G.H. Outer Ring and the remaining sub-areas of Southern Ontario.

Figure 3-5
Province of Ontario by Regional Area
Population Growth, 2001 to 2025



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

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



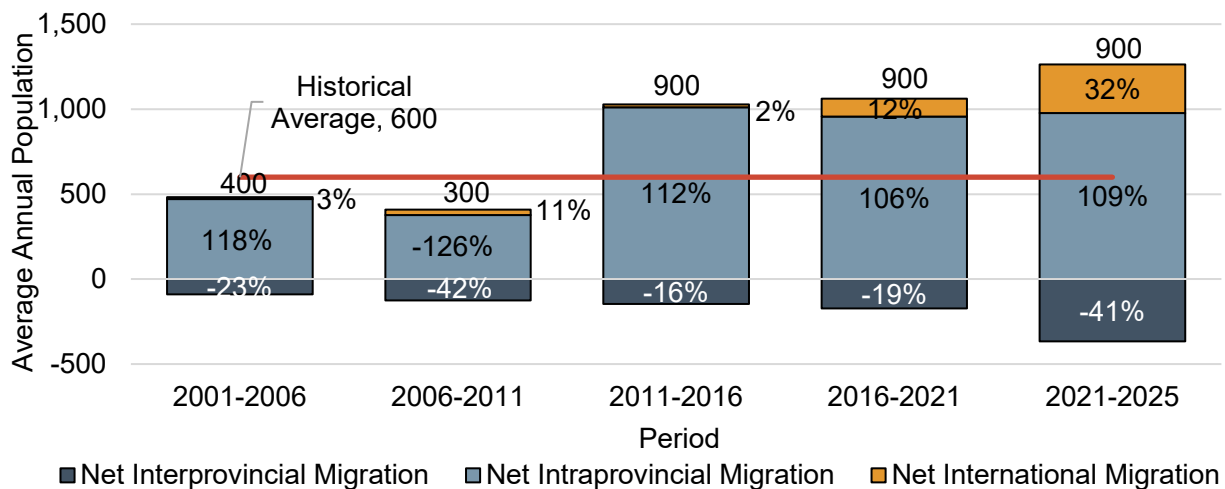
3.4.3 Components of Dufferin County Population Growth

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

- **International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents (N.P.R.s).
- **Interprovincial Net Migration** – comprises in-migration less out-migration from other Canadian provinces/territories; and
- **Intraprovincial Net Migration** – includes in-migration less out-migration from elsewhere within the Province of Ontario.

Figure 3-6 summarizes the components of migration within Dufferin County from 2021 to 2025. While this section emphasizes net migration, it should also be noted that Dufferin County has experienced positive growth in natural increase (i.e. births less deaths), driven by the County’s relatively high share of young adults and children. Historically, between 2001 and 2025, Dufferin’s population growth has largely been driven by net intraprovincial migration. While international migration saw an increase between 2016 and 2025, it is expected to stabilize or decline slightly in the near-term, largely due to recent reductions in federal immigration targets, as discussed in section 3.3.

Figure 3-6
Dufferin County
Components of Population Growth, 2001 to 2025



Source: Statistics Canada Table 17-10-0153-01, summarized by Watson & Associates Economists Ltd.

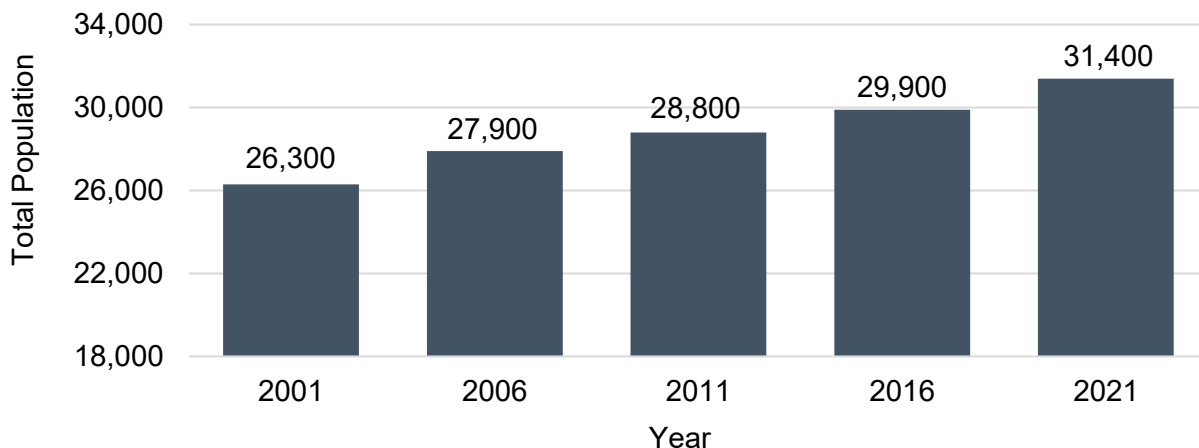


4. Demographic and Employment Trends in the Town of Orangeville

4.1 Population Trends

Figure 4-1 summarizes historical population trends for the Town of Orangeville over a 20-year period from 2001 to 2021. During this historical period, the Town's population increased from 26,300 in 2001 to 31,400 in 2021, an increase of approximately 5,100 people or an annual increase rate of approximately 0.9%. Comparatively, the population base for the Province of Ontario grew at an average rate of 1.1% annually during the same time period.

Figure 4-1
Town of Orangeville
Historical Total Population, 2001 to 2021



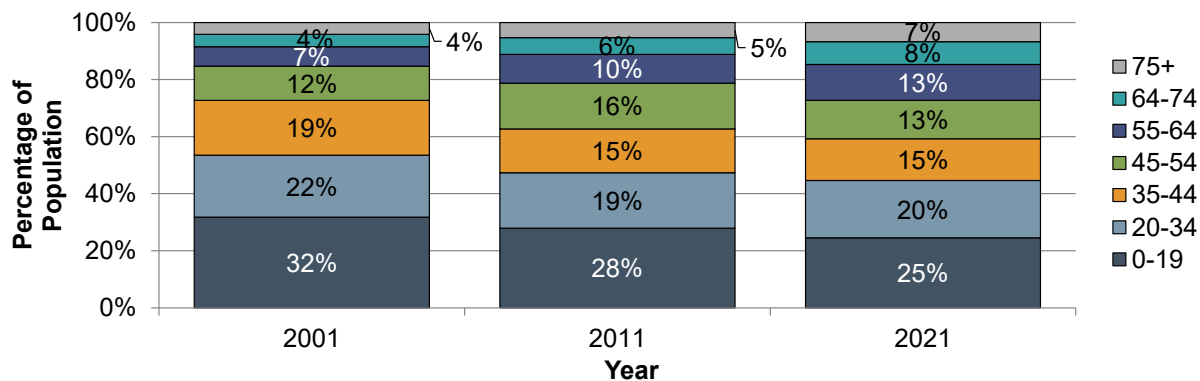
Note: Population includes net Census undercount.

Source: Data derived from Statistics Canada Census data, by Watson & Associates Economists Ltd.

Between 2001 to 2021, the Town has experienced positive growth in most population age groups, except for the 0 to 19 and 35 to 44 age groups. As illustrated in Figure 4-2, most of the Town's population growth was experienced in the 45+ age group. Historical and future population trends by age within Orangeville are important to consider, as these trends have a direct impact on housing needs by structure type (i.e., grade-related housing forms vs. high-density housing types), tenure (i.e., ownership vs. rental), and municipal service needs. This is discussed in further detail in section 5.3.



Figure 4-2
Town of Orangeville,
Historical Permanent Population by Age Cohort, 2001 to 2021



Source: Data derived from Statistics Canada Census data, 2001 to 2021, by Watson & Associates Economists Ltd.

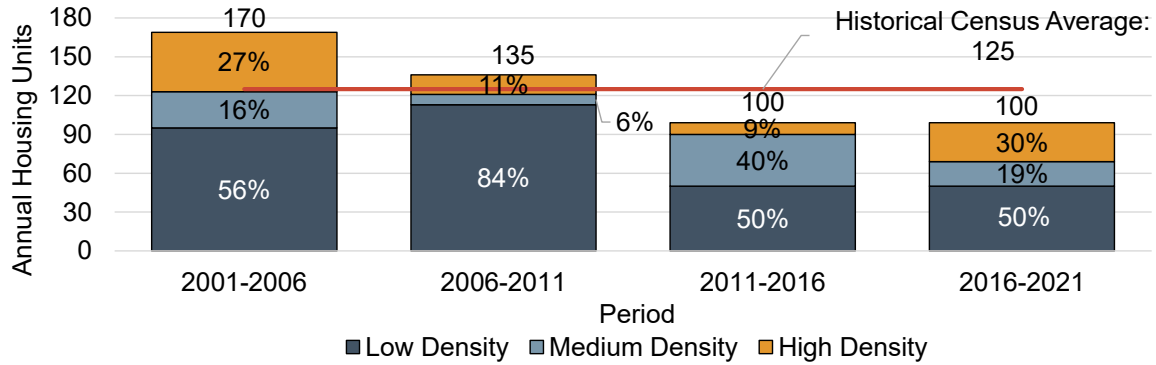
4.2 Housing Trends

4.2.1 Census Housing Growth by Structure Type

Orangeville added an average of approximately 125 new housing units annually between 2001 to 2021, as illustrated in Figure 4-3. The share of low-density units has decreased over the last two decades, while the share of medium- and high-density dwelling units has increased.



Figure 4-3
Town of Orangeville
Occupied Housing Units, 2001 to 2021



[1] Low-density housing includes single and semi-detached houses.
 [2] Medium-density housing includes townhouses and apartments in duplexes.
 [3] High-density housing includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.
 Note: Figures have been rounded and may not add up precisely.
 Source: Derived from Statistics Canada data, by Watson & Associates Economists Ltd.

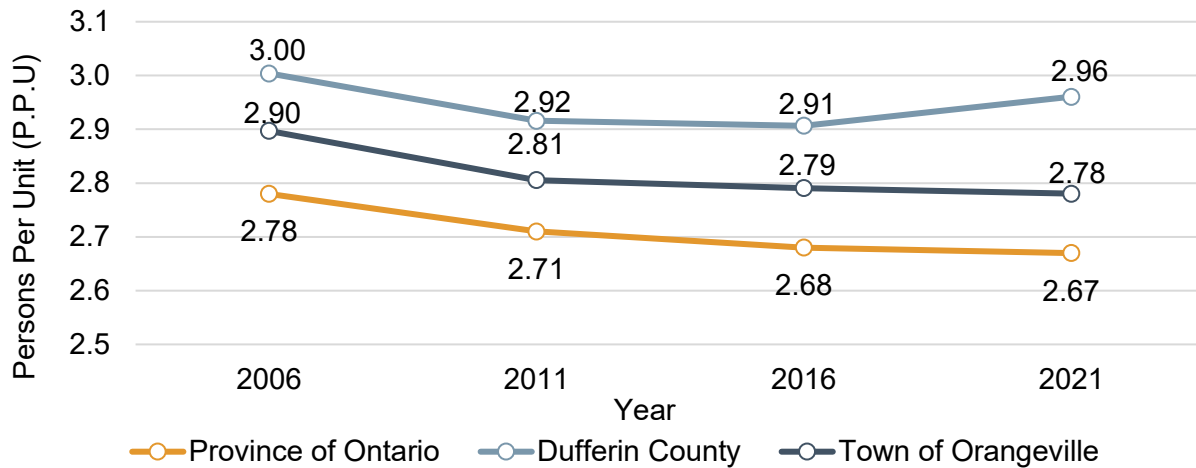
4.2.2 Average Persons Per Unit Trends

Figure 4-4 summarizes the average number of persons per unit (P.P.U.) in the Province of Ontario, Dufferin County, and the Town of Orangeville from the 2001 to 2021 historical period. Key observations are as follows:

- Orangeville has a higher average housing occupancy than the Province, but lower than Dufferin County; and
- Orangeville and Ontario both experienced a steady but stabilizing P.P.U. decline from 2006 to 2021. In contrast, Dufferin County saw an increase in average household occupancy levels from 2016 to 2021.



Figure 4-4
Orangeville, Dufferin County and Ontario
Average Household Occupancy, 2006 to 2021



Note: Population includes a net Census undercount.

Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd.

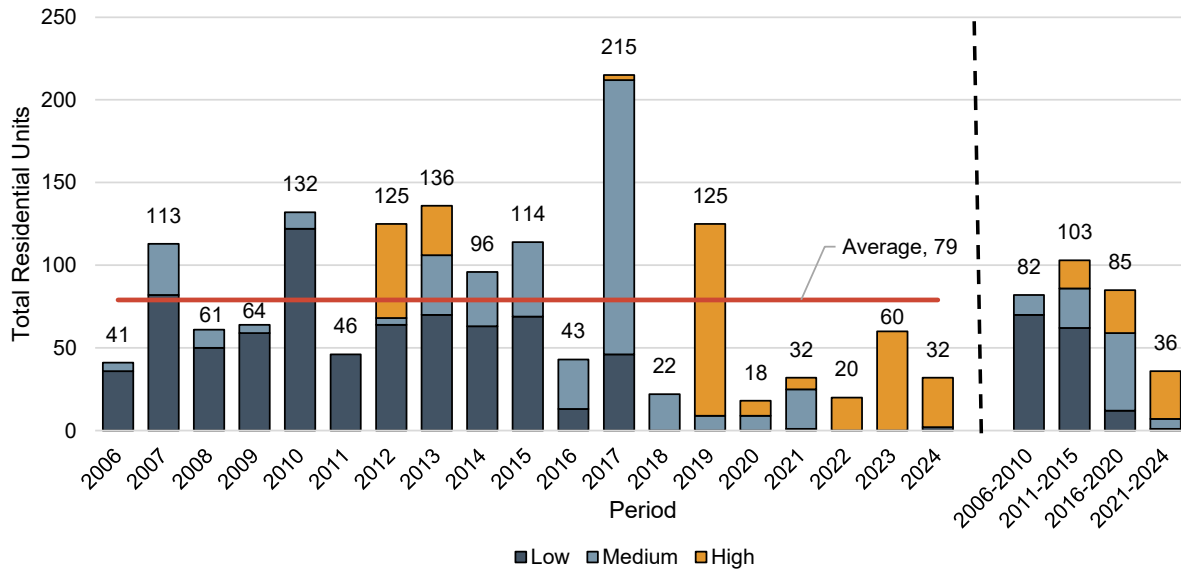
4.2.3 Residential Building Permit Activity

Figure 4-5 summarizes total residential building permits (new units only) by structure type between 2006 and 2024 within Orangeville. Key findings are as follows:

- Orangeville averaged 79 residential building permits annually from 2006 to 2024.
- The average rate of residential building permit activity remained relatively stable from 2006 to 2019 and has notably decreased since then. This is consistent with the recent slowdown in the broader housing market across Ontario.
- While low-density units have historically dominated development, the Town has experienced a notable increase in medium- and high-density development since 2016.



Figure 4-5
Town of Orangeville
Historical Residential Building Permits, 2006 to 2024



[1] Low-density housing includes single and semi-detached houses.
 [2] Medium-density housing includes townhouses and apartments in duplexes.
 [3] High-density housing includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.
 Note: Figures have been rounded and may not add up precisely.
 Source: Derived from Town of Orangeville building permit data, by Watson & Associates Economists Ltd.

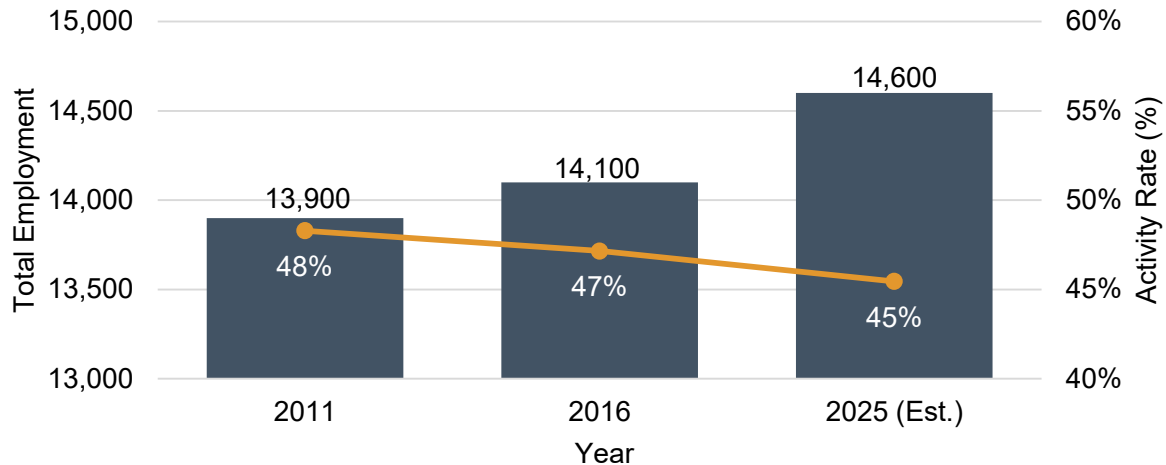
4.3 Employment Trends

The Town of Orangeville employment base over the 2006 to 2025 period is summarized in Figure 4-6. Key observations include the following:

- The Town’s total employment remained stable between 2011 to 2016, increasing slightly from 13,900 jobs to 14,200 jobs. Total employment has since increased moderately by 700 jobs to 14,600 in 2025.
- Orangeville’s employment activity rate (ratio of jobs per population) has decreased from 48% in 2011 to 45% in 2025, meaning the Town’s population grew at a faster pace than its employment.



Figure 4-6
Town of Orangeville
Total Employment and Activity Rate, 2006 to 2025

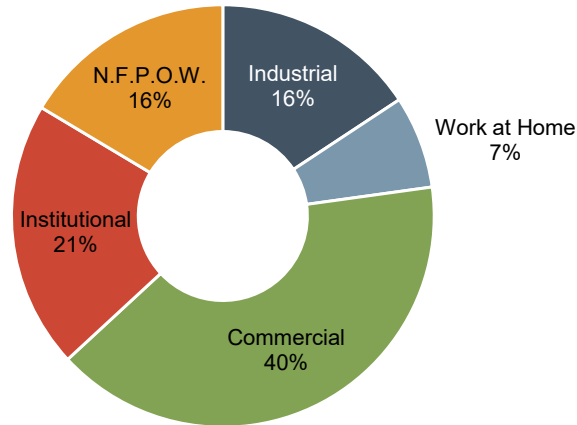


Notes: Numbers have been rounded. Total employment metrics include work at home and no fixed place of work. Activity rates include net Census undercount.
Source: Derived from Statistics Canada Census data, 2011 to 2016, and 2025 estimated by Watson & Associates Economists Ltd.

As illustrated in Figure 4-7, the Town of Orangeville has a diverse employment base. The commercial and institutional sectors primarily provide services for the needs of the population and comprise 61% of existing jobs. The industrial sector makes up 16% of jobs in the Town. Primary jobs are also included in Orangeville’s employment base but comprise less than 1% of total employment. Work at home and N.F.P.O.W. employment comprises 7% and 16% of the Town’s existing jobs, respectively.



Figure 4-7
Town of Orangeville
Employment Structure, 2025



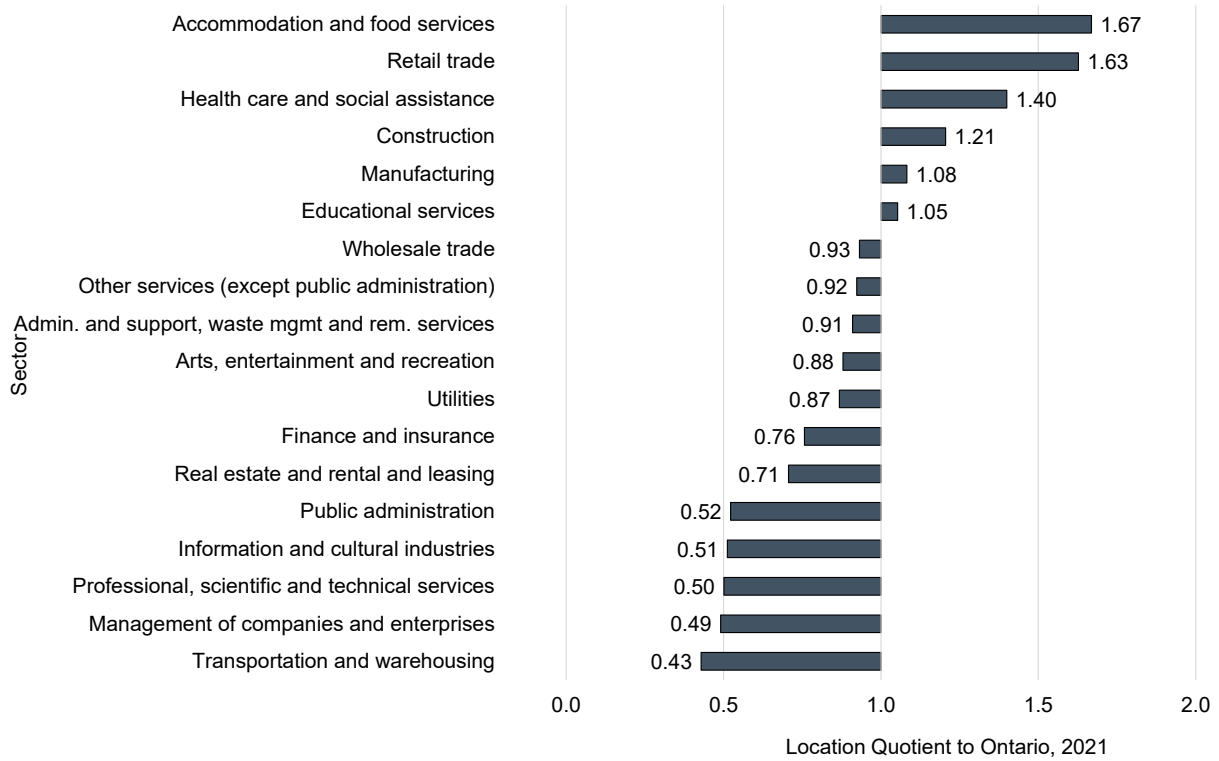
Notes: Figures include employed and self-employed jobs.
N.F.P.O.W. means no fixed place of work.
Source: Watson & Associates Economists Ltd.

Figure 4-8 illustrates the strength of employment sectors in the Town of Orangeville relative to the Province using Location Quotients (L.Q.).^[1] Orangeville has a relatively high concentration of employment in sectors such as accommodation and food service, retail trade, health care and social assistance, construction, manufacturing and education services. In contrast, the Town has a relatively low concentration of employment most notably in transportation and warehousing, management of companies and enterprises, professional, scientific and technical services, information and cultural industries, and public administration.

^[1] An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 identifies that the concentration of employment in a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or “cluster.”



Figure 4-8
Town of Orangeville
Location Quotients by Sector Relative to Ontario, 2021



Note: Includes work at home and place of work employment.

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



5. Long-Term Population, Housing and Employment Growth

5.1 Introduction

This chapter examines the long-range population, housing and employment growth outlook for the Town of Orangeville over the next 50 years. This review has been prepared based on a detailed assessment of the long-term growth outlook for the Town within the context of economic and demographic outlook for the Province of Ontario, the G.G.H., and Dufferin County over the next several decades. The methodology adopted to prepare this growth analysis and land needs assessment is consistent with the current provincial planning policy framework, as detailed in Appendix A. Details regarding the growth forecast methodology are provided in Appendix B.

5.2 Provincial and Regional Long-Term Population and Employment Growth Outlook

In developing the long-term growth forecast for the Town, a comprehensive assessment of the long-term population growth outlook for the Province of Ontario, the G.G.H, the G.G.H. Outer Ring, and Dufferin County has been undertaken. Consideration has also been given to recent population forecasts that have been developed at these broader levels of geography.

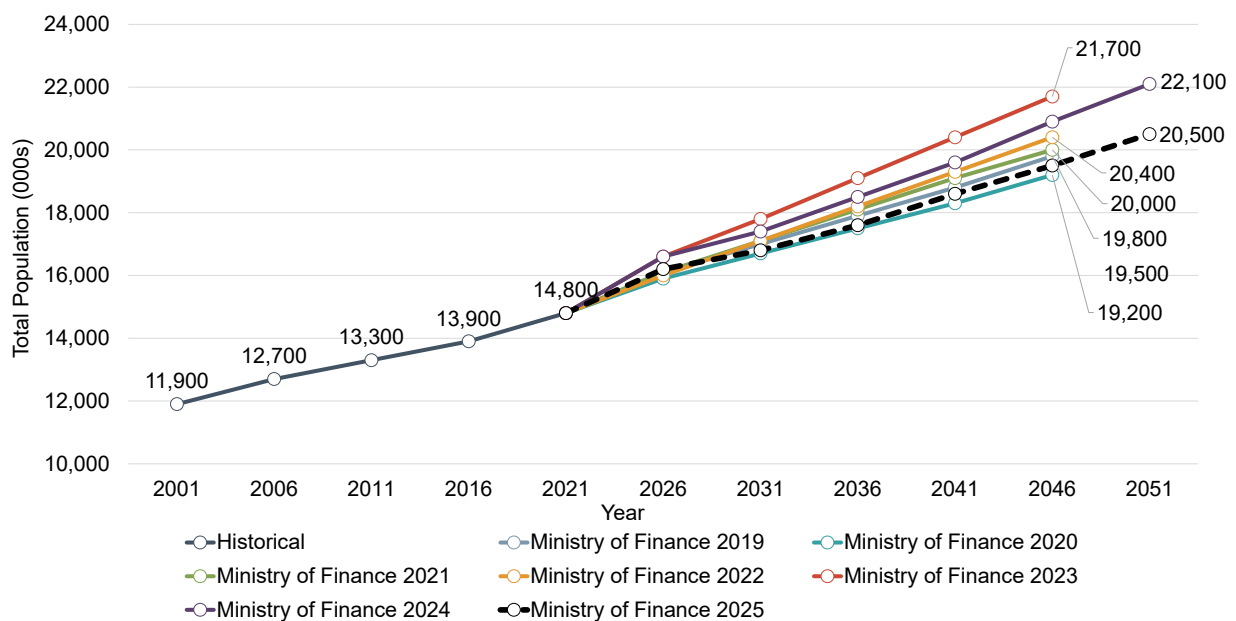
Figure 5-1 illustrates Ontario's population trends over the past 20 years and how the provincial population is forecast to grow to the year 2046 and 2051 in accordance with M.O.F. population projections since 2019. Key observations are as follows:

- Historically, the Province of Ontario has grown at a rate of 1.1% between 2001 and 2021, reaching a population of 14.8 million in 2021.
- Between 2019 and 2023, the M.O.F. population projections for Ontario showed a consistent upward trend in the Province's annual population growth rate with each new release between this time period. The latest 2024 and 2025 projections have steadily reduced the provincial population outlook to 2051, reflecting reduced federal immigration targets and a lower near-term economic outlook, as discussed in Chapter 3.



- The latest 2025 M.O.F. update indicates that Ontario’s population is projected to grow at an annual rate of around 1.1% from 2021 to 2051, adding approximately 190,000 people per year and reaching a population of 20.5 million by 2051.
- Comparatively, the level of annual population growth forecast for Ontario under the 2025 M.O.F. forecast is 29% higher than the level of population growth achieved between 2001 and 2021.

Figure 5-1
Province of Ontario
Ministry of Finance Population Projections, 2019 to 2025



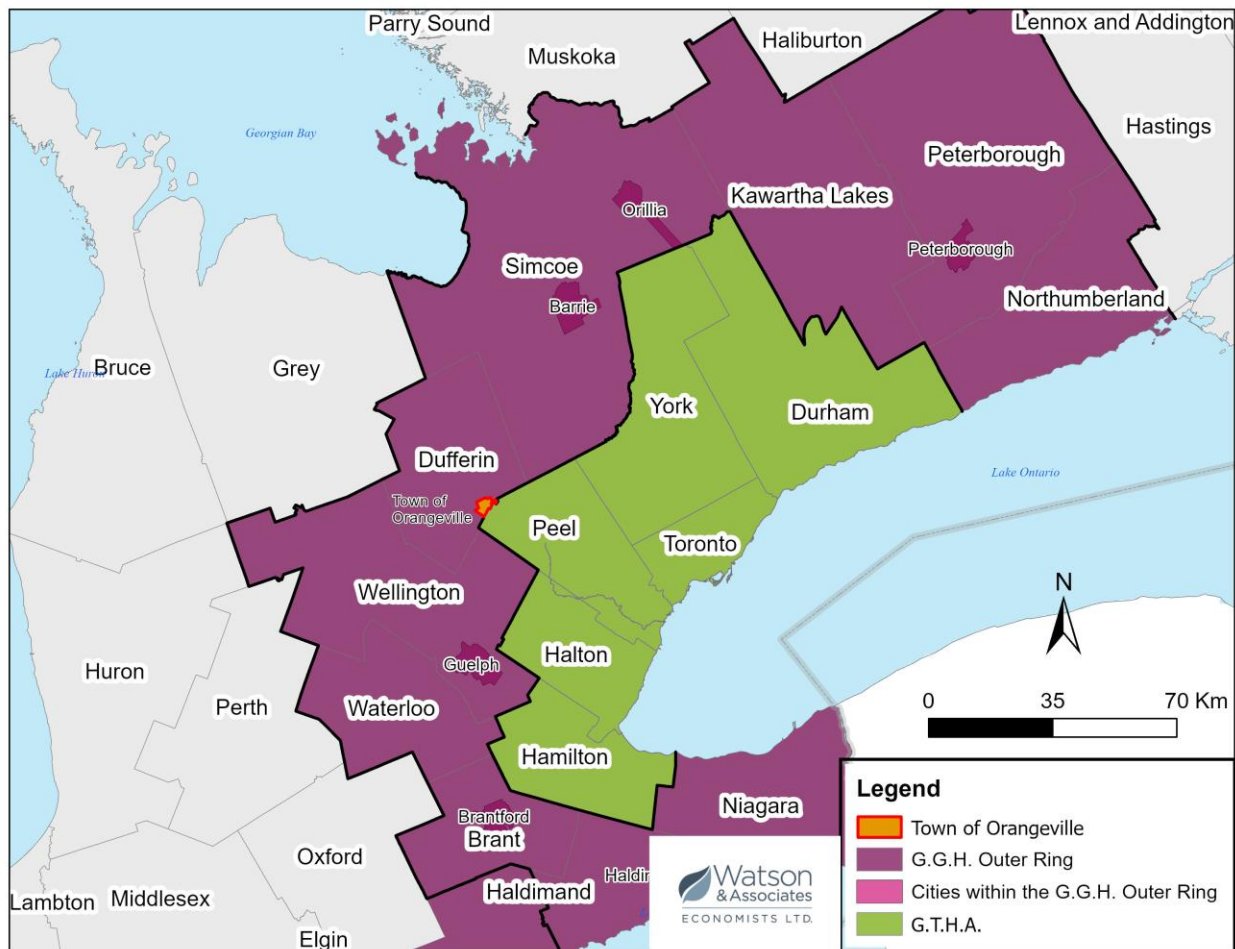
Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical 2001 to 2021 data from Statistics Canada Table: 17-10-0152-01, and Ministry of Finance projections from Summer 2019, Spring 2020, Spring 2021, Summer 2022, Summer 2023, Fall 2024, and 2025 Interim Update releases derived by Watson & Associates Economists Ltd.

As mentioned in section 3.4, future population and employment growth within Orangeville is strongly correlated with the growth outlook and competitiveness of the G.G.H. regional economy. The municipalities that comprise the G.G.H. are illustrated in Figure 5-2. The G.G.H. is one of the fastest-growing larger City/Regions in North America. The G.G.H. represents a key centre of economic activity for Ontario and Canada. The G.G.H. is economically diverse, with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. Within the



G.G.H., the G.T.H.A. industrial and office commercial real-estate markets are significant, having the third and sixth largest inventories, respectively, in North America. Over the past several decades, economic opportunities within the G.G.H. have represented a key draw for international migration, as well as migration from other areas of the Province. In accordance with the M.O.F. projections, the long-term outlook for the G.G.H. is very positive, characterized by strong population growth fueled by economic expansion, which continues to be largely concentrated in the larger urban centers of this region.

Figure 5-2
Town of Orangeville within the Context of the Greater Golden Horseshoe



Note: G.G.H. means Greater Golden Horseshoe; G.T.H.A. means Greater Toronto and Hamilton Area.

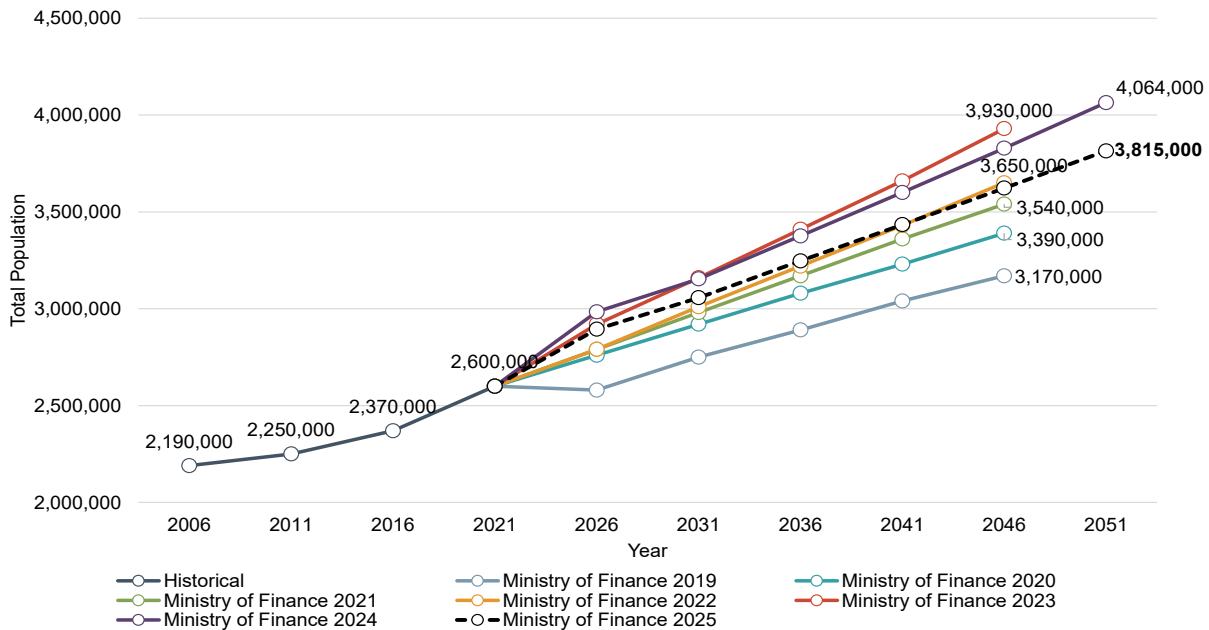


Over the past several decades, the G.T.H.A. and the Greater Ottawa Region have experienced the highest annual rate of population growth within the Province of Ontario. Since 2011, however, and more notably during the latest Statistics Canada Census period (2016 to 2021), the share of Ontario's population growth has been increasingly concentrated outside the G.T.H.A., in the G.G.H. Outer Ring, Eastern Ontario, and Southwestern Ontario. These growth patterns experienced between 2016 and 2021 are anticipated to continue over the forecast period and are reflected in the M.O.F. 2025 Reference Scenario. Figure 5-3 presents the 2025 reference forecast from M.O.F. for the G.G.H. Outer Ring. Key highlights are as follows:

- Historically, the G.G.H. Outer Ring population has grown at an annual rate of 1.1%, which is comparable to growth in the Province as a whole.
- Similar to the Province, the M.O.F. projections for this region steadily increased between 2019 to 2023, before moderating in the latest 2024 and 2025 releases.
- The M.O.F. 2025 projections indicate the G.G.H. Outer Ring is projected to reach 3.8 million people by 2051, growing at an annual rate of 1.3%.
- Comparatively, A Place to Grow: Growth Plan for the G.G.H., 2020 (the Growth Plan) forecast the G.G.H. to grow at an annual rate of 1.3%, reaching 3.7 million people by 2051.
- Notwithstanding the current macro-economic headwinds, the 2025 M.O.F. projections for the G.G.H. Outer Ring appear ambitious but appropriate for long-term planning purposes. The long-term population growth outlook for the G.G.H. Outer Ring remains strong relative to historical population growth trends for this region over the past 20 years, as well as to the population growth outlook for the Province as a whole.



Figure 5-3
Greater Golden Horseshoe – Outer Ring
Recent Ministry of Finance Projections, 2021 to 2051



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical data from Statistics Canada Census, 2001 to 2021, and Ministry of Finance projections from Summer 2019 to Summer 2025 releases, adapted by Watson & Associates Economists Ltd.

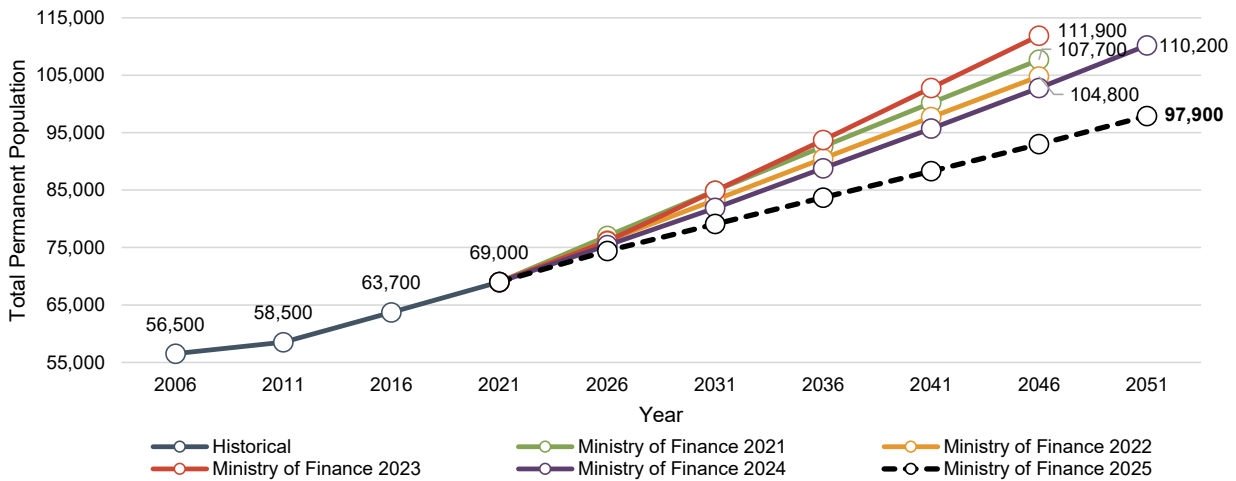
A review of the M.O.F. population growth trends for Dufferin County was also undertaken. Figure 5-4 highlights the population growth outlook anticipated by the M.O.F. between the 2021 and the most recent 2025 projections. Key observations are:

- Between 2006 and 2021, Dufferin County grew at an annual growth rate of 1.3%.
- Similar to the province and G.G.H. Outer Ring, the population projections for Dufferin County moderated in the latest 2024 and 2025 M.O.F. releases.
- The M.O.F. 2025 Reference Scenario projects that Dufferin County will reach 97,900 people by 2051, growing at an annual rate of 1.2% which is generally comparable to historical trends and the outlook for the G.G.H. Outer-Ring as whole.
- Comparatively, the Growth Plan forecast Dufferin County and Dufferin County O.P. forecast a population of 95,000 and 100,700 by 2051, respectively. Both



forecasts are comparable to the 2025 M.O.F. projections, being within 3% of its 2051 population.

Figure 5-4
Dufferin County
Ministry of Finance Population Projections, 2021 to 2051



Note: Population includes net Census undercount. Figures have been rounded.
Source: Historical data from Statistics Canada Census, 2006 to 2021, and Ministry of Finance projections from Spring 2021 to Summer 2025 releases, adapted by Watson & Associates Economists Ltd.

As discussed in further detail in Appendix A, the P.P.S., 2024 and the proposed P.M.G. require municipalities to consider growth forecasts prepared using M.O.F. projections and allow municipalities to modify these forecasts, as appropriate. It is noted that the use of the M.O.F. forecasts is not meant to replace long-term forecasting by municipalities. Rather, the M.O.F. forecasts (provided at the Census Division level) are to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area-municipal growth allocations.



5.3 Town of Orangeville Long-Term Population and Employment Growth Forecast

5.3.1 *Regional and Local Factors Influencing Population and Employment Growth*

As previously discussed, the Town's long-term population, housing and employment growth potential will be influenced by both the broader outlook for the G.G.H. and local factors related to urban land supply and municipal servicing. These broad and local factors have been considered in shaping the potential long-term growth population and employment growth scenarios for the Town, as discussed below.

At the local level, municipal water and wastewater servicing capacity is an important factor impacting the amount of future growth the Town can accommodate. The long-term population, housing, and employment growth outlook for Orangeville has been considered within the context of the availability of existing municipal water and wastewater servicing capacity and potential long-term solutions to overcome these identified constraints.

The availability of vacant designated land is also a key factor influencing the amount and type of future development. The Town has a finite and diminishing urban land supply within its corporate boundary to accommodate new development, which is discussed herein in sections 6.1, 6.4 and 6.5.

5.3.2 *Long-Term Growth Scenarios*

Building on the key assumptions discussed in section 5.2 and subsection 5.3.1, two long-term population and employment scenarios have been prepared for the Town of Orangeville. The key assumptions for the scenarios are as follows:

1. **Scenario 1 – Constrained: Growth Scenario:** reflects currently available water and wastewater servicing capacity and potential residential and non-residential supply within the Town's corporate boundary. Urban land opportunities include vacant greenfield land designated for residential and non-residential development as well as intensification (i.e., infill and redevelopment). Based on discussions with Town staff, existing municipal water and wastewater systems are estimated to have a servicing capacity of up to 36,500 people.



- Scenario 2 – Expansion Scenario:** assumes that the Town attracts and accommodates a proportionate share of County-wide and G.G.H. population and employment growth over the long term. Under this scenario, it is assumed that local municipal water and wastewater servicing constraints and urban land requirements to accommodate anticipated future growth are overcome by 2041 and addressed throughout the long-term planning horizon.

It is recognized that any long-term growth scenario for Orangeville will require the Town to consider long-term municipal servicing solutions and adjustments to its corporate boundary. Due to the complexity and anticipated timelines associated with this process, it is important for the Town to consider a long-term planning horizon for expansion beyond the current horizons of the County and Town O.P. Accordingly, Scenario 2 is premised on a 50-year planning horizon.

5.3.3 Town of Orangeville Population Forecast

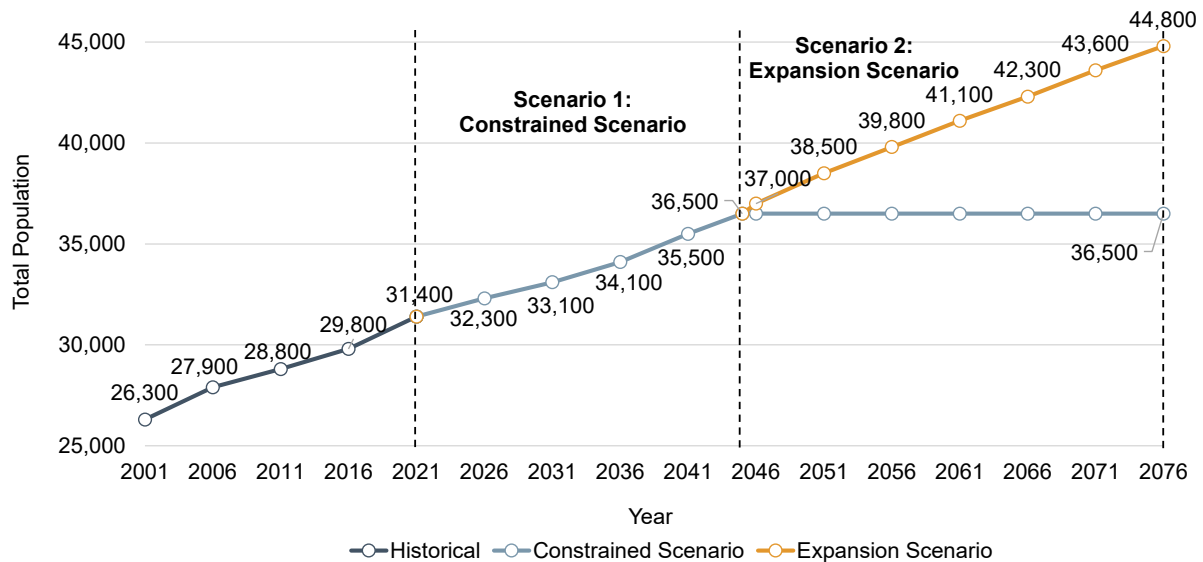
Figure 5-5 illustrates the long-term population growth forecast for the Town of Orangeville under the Constrained and Expansion Scenarios. Key findings include:

- Orangeville's population increased at a 0.9% annual growth rate from 2001 to 2021, adding approximately 255 people a year.
- Under the Constrained Scenario (Scenario 1), it is assumed that existing municipal water and wastewater capacity can accommodate up to 36,500 people by approximately 2045. This represents an additional 5,000 people (215 annually) from 2021 to 2045.
- Under this scenario, it is anticipated that the pace of population growth could potentially slow over time as the Town's supply of greenfield land diminishes. Assuming the Town's corporate boundary remains fixed, and no further expansions are made to the Town's municipal water and wastewater systems, the Town's population would not exceed 36,500. In order to maintain a stable population after 2045, it is foreseeable that the Town could accommodate a modest level of new high-density housing development through intensification to offset the population decline in existing households to 2076. This is further discussed in subsections 5.3.4 to 5.3.6.
- Under the Expansion Scenario (Scenario 2), the Town is forecast to reach 44,800 people by 2076, adding 13,400 people (245 annually) between 2021 and 2076, at an annual growth rate of 0.6%. This reflects a comparable amount of



absolute annual population growth relative to what the Town has experienced over the last two decades.

Figure 5-5
Town of Orangeville
Population Forecast, 2021 to 2076



Note: Population includes net Census undercount and figures have been rounded.
Source: Historical 2001 to 2021 data derived from Statistics Canada data, forecast prepared by Watson & Associates Economists Ltd.

As shown in Figure 5-5, the Town’s near-term and longer-term population outlook to 2076 generally aligns with the pace of population growth experienced in the Town over the past two decades, and appears suitable for long-range planning for the following reasons:

1. Over the near term (i.e., next one to five years), the population outlook represents a reasonable amount of future annual population growth considering recent and forecast immigration levels expected for Canada and Ontario.
2. The rate of population growth for the Town over the longer term (i.e., five plus years) considers the population growth forecasts for the Province, the G.G.H. Outer Ring, and Dufferin County. As previously noted, continued outward growth pressure from the G.T.H.A. will continue to represent the largest driver of population growth for the Town of Orangeville.



3. Scenario 1 considers the Town's current limits to municipal water and wastewater servicing capacity and designated urban land supply. The pace of population and employment growth under this scenario will allow sufficient time for the Town, working with its neighbouring municipalities (where applicable), to plan for the necessary municipal services and urban lands required to accommodate anticipated residential and non-residential development assumed under Scenario 2.
4. The anticipated population growth in Orangeville will require steady levels of net migration to offset downward pressure on the population base due to the aging population. Forecast near- and long-term trends in net migration are considered strong but plausible within the context of federal immigration targets, regional migration patterns, and projected long-term population growth rates across Southern Ontario. Appendix C provides additional details regarding the population growth forecast under each scenario.

5.3.4 Forecast Population by Age Group

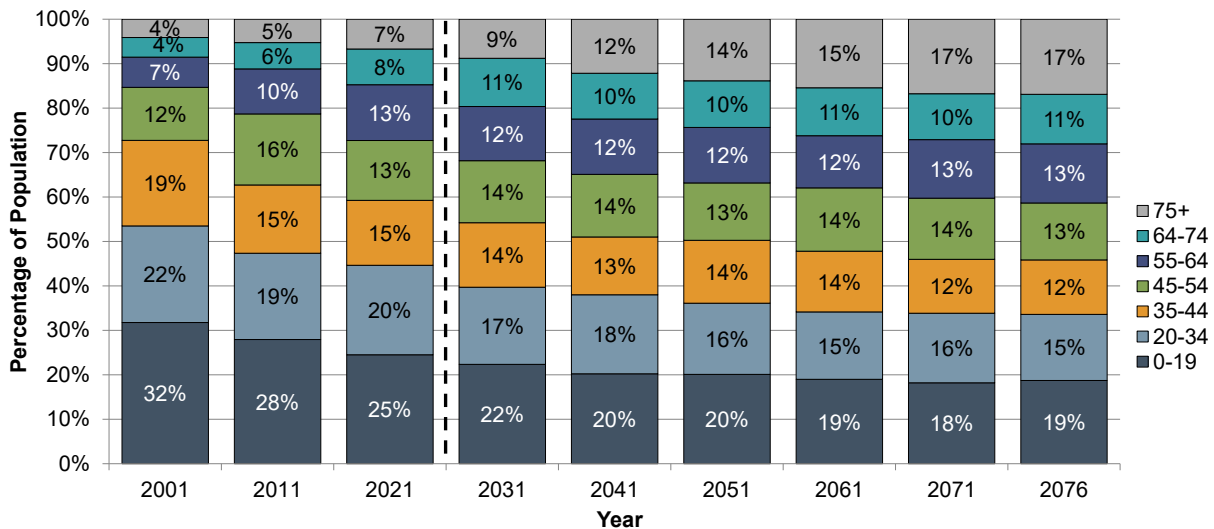
Figure 5-6 summarizes the Town-wide population forecast by major age group to 2076, with additional details provided in Appendix C. Key findings include:

- The Town's population is expected to steadily age, with the 65+ age group forecast to increase from 15% of the population in 2021 to 28% in 2076.
- The aging of the population is anticipated to place downward pressure on the rate of population and labour force growth within the Town over the long term. It is also anticipated that this will place increasing demand for housing options to accommodate the Town's growing seniors' population base.
- Similar to the Province, the Town will increasingly become more reliant on net migration as a source of population growth as population growth associated with natural increase (births less deaths) declines and potential becomes negative over the long term due to the aging of the population.
- While the population base is aging, the Town is also anticipated to accommodate a steady increase of young adults and adults in family-forming age groups. This will require a broad range of ownership and rental housing opportunities to accommodate a diverse population base across a broad range of income levels.
- It is important to note that under Scenario 1, the population by age structure is anticipated to become more weighted towards the seniors' population age group.



This is due to a lower level of net migration associated with new families and younger population age groups under Scenario 1 over the long term.

Figure 5-6
Town of Orangeville
Population by Age Cohort, 2001 to 2076



Note: Population includes net Census undercount.

Source: Historical derived from Statistics Canada Census and Demography Division data, 2001 to 2021. 2021 to 2076 forecast by Watson & Associates Economists Ltd.

5.3.5 Trends in Housing Occupancy

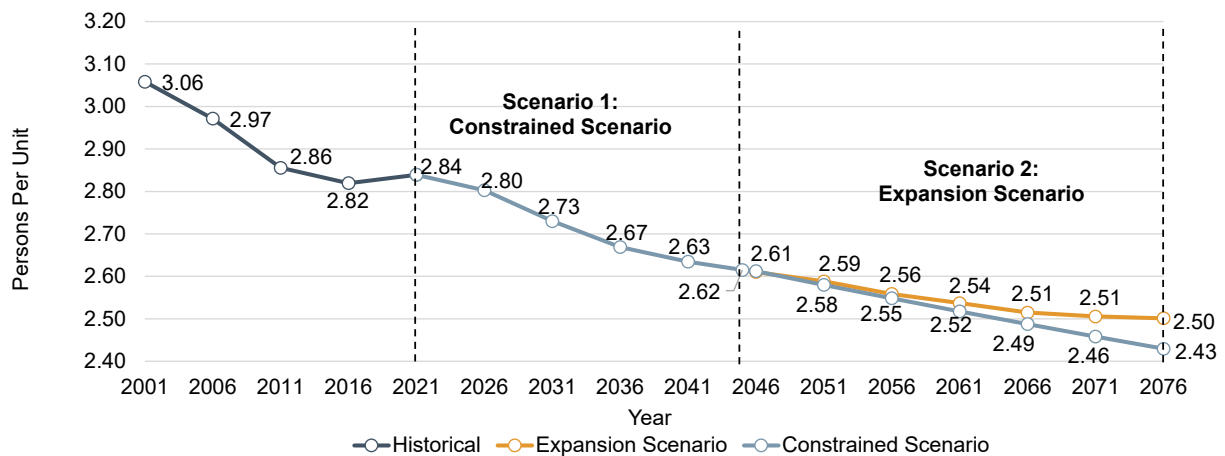
Figure 5-7 summarizes anticipated long-term trends in average housing occupancy (i.e., P.P.U.) for Orangeville from 2021 to 2076. The P.P.U. forecast is based on a headship rate analysis (refer to Appendices B and C) and includes the following observations:

- Between 2001 and 2021, the average P.P.U. decreased from 3.06 to 2.84.
- Over the long-term forecast period, the average P.P.U. is anticipated to continue to gradually decline to 2.62 by 2045 under Scenario 1 and 2.50 by 2076 under Scenario 2. This downward trend in the P.P.U. is largely a result of the aging of the population, which typically results in a population decline associated with existing households.
- Under Scenario 2, the P.P.U. is forecast to moderate over time, partially driven by stronger net migration levels attributed to working-age adults and their children. In contrast, under Scenario 1, the P.P.U. would be anticipated to decline



at a faster rate after 2045 due to lower net migration levels assumed under the constrained assumptions.

Figure 5-7
Town of Orangeville
Historical and Forecast Persons Per Unit, 2001 to 2076



Note: Persons per unit includes net Census undercount.

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

5.3.6 Housing Forecast by Structure Type

Figures 5-8a and 5-8b summarizes the long-term annual household forecast by housing structure for Orangeville under the Constrained and Expansion Scenarios. Key findings are as follows:

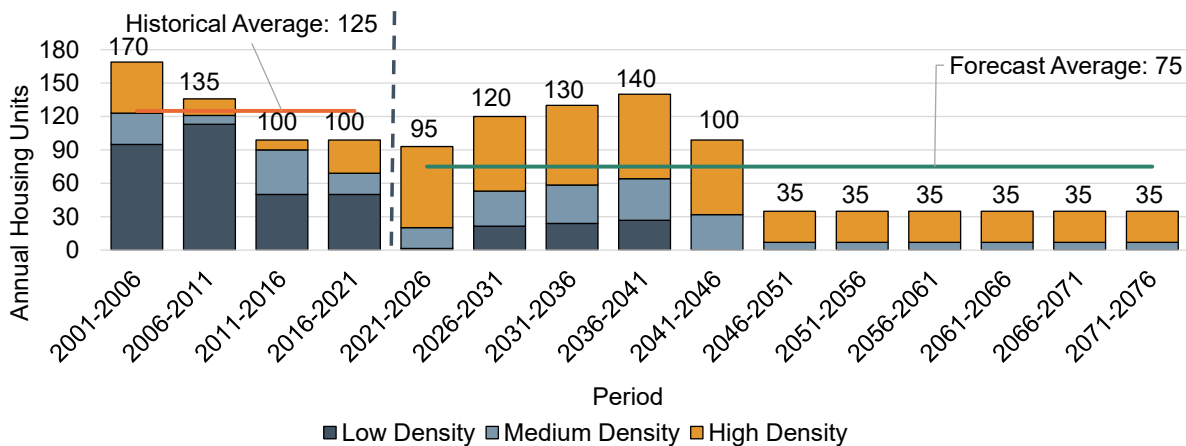
- Under Scenario 1, an additional 2,880 housing units (120 annually) are forecast to accommodate 36,500 people by approximately 2045. Due to limited existing opportunities for new low-density housing development (see subsections 5.4.4 and section 6.1), 13% of housing growth is forecast in low-density housing forms, followed by medium-density at 26%, and high-density at 60% from 2021 to 2045.
- Under the Constrained Scenario, it is foreseeable that the Town would add a modest number of additional housing units, predominantly in high-density forms, including additional residential units (A.R.U.s), to maintain a population of 36,500



after 2045. This would require approximately 35 new housing units annually from 2045 to 2076.^[1]

- Under Scenario 2, the Town is forecast to grow by 6,850 housing units (125 annually) to 2076. Under the Expansion Scenario, it is assumed that a Corporate Boundary expansion will occur prior to 2041, providing opportunities for new low-density and medium-density housing in greenfield areas. Under this scenario, new housing development is forecast to comprise 27% low-density, 27% medium-density, and 46% high-density units.

Figure 5-8a
Town of Orangeville
Constrained Scenario: Housing by Structure Type, 2001 to 2076



Notes:

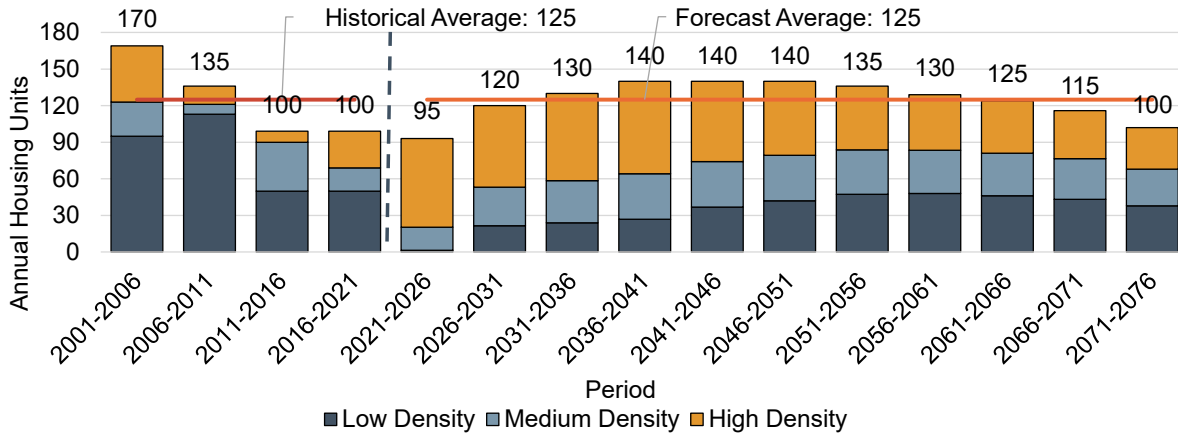
- Low-density housing includes single detached and semi-detached units.
- Medium-density housing includes townhouses and apartments in duplexes.
- High-density housing includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, including stacked townhouses.

Source: Historical 2001 to 2021 data derived from Statistics Canada Census data. Forecast prepared by Watson & Associates Economists Ltd.

^[1] A housing unit mix of 20% medium-density and 80% high-density units from 2045 to 2076 is assumed to sustain a population of 36,500, which is tied existing water and wastewater servicing capacity potential.



Figure 5-8b
Town of Orangeville
Expansion Scenario: Housing by Structure Type, 2001 to 2076



Notes:

- Low-density housing includes single detached and semi-detached units.
- Medium-density housing includes townhouses and apartments in duplexes.
- High-density housing includes bachelor, 1-bedroom, and 2-bedroom+ apartment units, including stacked townhouses.

Source: Historical 2001 to 2021 data derived from Statistics Canada Census data. Forecast prepared by Watson & Associates Economists Ltd.

5.4 Aligning Housing Needs with Anticipated Demographic Trends in the Town of Orangeville

As previously discussed, accommodating a steady rate of population growth will require the Town to provide a broad range of housing options by location, structure type/ density, and affordability to accommodate a growing and diversifying population base by age and income. Provided below is a brief discussion of the housing needs associated with the broad demographic groups that will be seeking housing in the Town over the next several decades.

5.4.1 Attracting Younger Generations

Population growth within the Town of Orangeville will continue to be increasingly driven by net-migration associated with young adults and families. This broad age group is anticipated to comprise the majority of newcomers within the Town over the next several decades. In contrast, the Town is not anticipated to attract significant population growth associated with new residents 55+ years of age through net migration. These



trends in net migration are generally consistent with many mid-sized and large suburban communities across the G.G.H.

In comparison to historical trends, future population growth pressures associated with young adults and growing families are anticipated to be strong. Job opportunities within the commuter-shed play a key role in attracting young adults to the Town. Such newcomers will be seeking a broad range of housing options, ranging from affordable, higher-density ownership and rental housing options for younger adults to ground-oriented housing options for those in peak family-forming years. As such, providing a broad range of housing choice is important to ensure that both new and existing residents within the Town can be accommodated over the long term.

A fundamental planning policy objective for the Town of Orangeville is to plan for complete communities that offer a broad range of housing options, community facilities, and a diverse mix of local employment opportunities. This is important because it recognizes that the Town has a role to play in attracting, growing, and retaining local businesses by providing housing options to a growing local labour force base, including younger generations such as Millennials, Generation Z and future generations.^[1] To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by the Town of Orangeville (working with its partners) to explore ways to attract and accommodate new skilled working-age residents to the Town within a diverse range of housing options by structure type, tenure, and location. Labour force attraction efforts must also be linked to a broad range of attainable housing accommodations (both ownership and rental), infrastructure, municipal services, amenities, and quality of life attributes that appeal to the younger mobile population while not detracting from the Town's attractiveness to families and older population segments.

Lifestyle preferences also play an important role in the type of housing that is provided and are a key determinant in residential development location decisions, particularly as lifestyle preferences relate to younger demographic groups within urban settings.

^[1] Millennials are typically defined as the segment of the population which reached adulthood during the 2000s. While there is no standard age group associated with the Millennial generation, people born between 1980 and 1992 (currently 33 to 45 years of age in 2025) best fit the definition of this age group. For the purposes of this study, we have assumed that those born between 1993 and 2005 (19 to 31 years of age as of 2025) comprise Generation Z.



Mixed-use environments that integrate residential and commercial uses with other community uses and public open spaces represent opportunities to attract younger working-age residents over traditional suburban environments. This underscores the concept of “place making” as an increasingly recognized and important planning approach to creating diverse and vibrant neighbourhoods and workplaces, which, in turn, can help attract local population and job growth, provided that other necessary infrastructure requirements are met.

5.4.2 Accommodating Adults and Families

To a large extent, newcomers to the Town within the 35 to 54 age group will continue to seek new and resale ground-oriented housing options, including single detached, semi-detached units and a variety of townhouse products (i.e., traditional townhouses, back-to-back, and stacked townhouses). In addition, increasing demand is anticipated across a range of other missing middle housing options, including duplexes, triplexes, fourplexes, and other low-rise hybrid buildings.^[1]

Looking forward, the composition of households in the Town of Orangeville is anticipated to diversify. On the one hand, the Town is anticipated to experience an increase in the number of multi-generational families, which typically generate larger average household sizes in terms of average P.P.U. On the other hand, the Town is also experiencing an increase in the share of non-Census families, which typically produce smaller average households. This suggests an increasing need to provide for a broader range of housing products by built-form/density and affordability to meet the diverse needs of both smaller and larger households by life stage and income.

5.4.3 Accommodating an Aging Population

As previously discussed, forecast trends in population-age structure are important to address, as these demographic trends directly influence the rate of future population growth, future housing needs, infrastructure requirements, and community services. For Canadian municipalities, including the Town of Orangeville, the influence of the Baby

[1] The “missing middle” describes a range of medium-density housing types between single detached houses and apartment buildings. This includes a range of multi-unit or clustered housing types compatible in scale with single-family homes that help meet the growing demand for walkable urban living, such as duplexes, triplexes, fourplexes, row houses, and townhouses.



Boom generation on real-estate market demand over the next several decades remains a key issue.

As the Town's Baby Boomer population continues to age over the next several decades, the percentage of older seniors (i.e., people 75 years of age and older) is anticipated to steadily increase from approximately 7% in 2021 to 17% in 2076 (refer to subsection 5.3.4). This represents a forecast annual population growth rate for the 75+ age group of 2.3%, compared to 0.6% for the Town's total population.^[1]

Not only is the Baby Boom age group growing in terms of its population share in the Town of Orangeville, but it is also diverse with respect to age, income, health, mobility, and lifestyle/life stage. When planning for the needs of older adults, it is important to consider these diverse physical and socio-economic characteristics relative to younger population age groups. On average, seniors, particularly those in the 75+ age group, have less mobility and typically require greater health care compared to younger seniors (65 to 74 age group) and other younger segments of the working-age population. Typically, these characteristics associated with the 75+ age group drive relatively stronger demand for higher-density forms (e.g., rental apartments, condominiums, and seniors' homes) than among younger adults. Market demand for these types of housing products in the Town of Orangeville is strongest in locations close to urban amenities such as retail, dining and entertainment, health care facilities, and other community services geared towards older seniors.

Considerable research has been undertaken over the past decade regarding the aging population and its impact on housing needs over the long term. The majority of literature and commentary regarding the housing needs of older Canadians overwhelmingly suggests that a large percentage of seniors will "age in place"; that is, to continue to live in their current home and/or community for as long as possible even if their health changes.^[2] While there is strong rationale to support "aging in place" as a general concept, it is important to recognize that demand for high-density dwellings is highest in Orangeville for those aged over 75 years, as well as younger adults under 34, similar to other comparable Canadian municipalities.^[3]

[1] Over the 2021 to 2076 planning horizon, the 75+ age group is anticipated to be about 2% of total net migration in the Town of Orangeville.

[2] Canadian Housing Observer 2011. CMHC. 2011.

[3] Statistics Canada 2021 Census data.



With this in mind, the concept of “aging in place” should emphasize the goal to age with some level of independence “within the community,” as opposed to simply “aging at home.” The overarching message around “aging in place” is that seniors require choice as well as access to services and amenities regarding their living arrangements.^[1] In part, this is being accomplished in the Town by creating new housing options, largely in intensification areas, to facilitate “aging in place” and ensure seniors can remain in their communities when responding to life changes. In turn, providing a broader range of housing options for the Town’s growing seniors’ population will reintroduce additional grade-related (i.e., low- and medium-density) housing into the local supply inventory to accommodate existing and new families in Orangeville.

5.4.4 Long-Term Employment Growth, 2025 to 2076

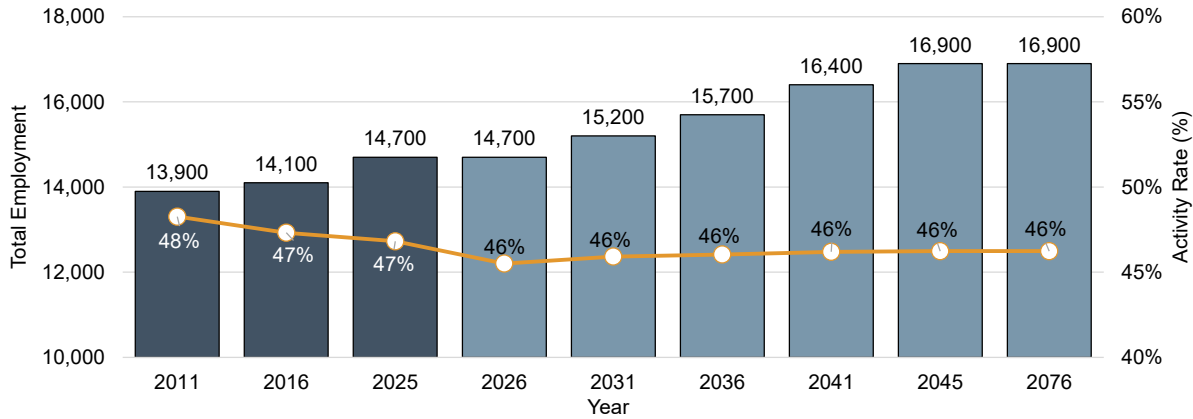
Building on the population growth forecast and key macro and regional growth assumptions discussed throughout Chapter 3 and sections 5.2 to 5.4, a long-term employment growth forecast for Scenarios 1 and 2 has been prepared for the Town of Orangeville, as summarized in Figures 5-9a and 5-9b. Key observations are as follows:

- As of 2025, the Town has an estimated employment base of 14,700 jobs.
- Under the Constrained Scenario, the employment base for the Town is forecast to increase by 2,200 employees, reaching 16,900 total jobs by 2045, and is anticipated to remain stable through to 2076. The employment activity rate (ratio of jobs to population) is forecast to remain stable at 46%, suggesting the Town’s population and employment are forecast to grow at a similar rate.
- Under the Expansion Scenario, Orangeville’s employment is forecast to increase by 7,100 jobs, reaching 21,800 total jobs by 2076. The employment activity rate is forecast to increase from 46% in 2025 to 49% in 2076. This suggests the Town’s employment is forecast to grow at a slightly faster pace than its population, driven by export-based employment opportunities that can be accommodated in new Employment Areas established and other employment-generating lands during the post-2041 period.
- The employment growth forecast is a plausible outlook for Orangeville, considering our review of macro, regional, and local economic trends, as well as the Town’s long-term population growth forecast.

[1] The Meaning of “Aging in Place” to Older People. *The Gerontologist*, Vol. 52, No. 3, 2012.



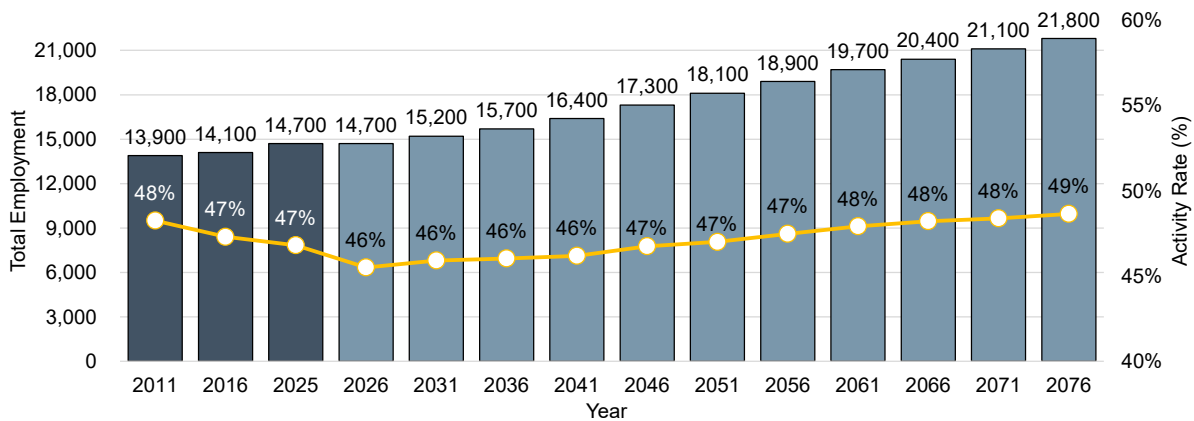
Figure 5-9a
Town of Orangeville
Scenario 1: Constrained Scenario
Employment Forecast 2025 to 2076



Notes: Figures have been rounded. The population used to calculate the activity rate includes a net Census undercount. Statistics Canada 2021 Census employment data has been reviewed. Accordingly, Watson & Associates Economists Ltd. developed a 2025 employment base using a range of sources.

Source: Historical 2006 to 2016 data from Statistics Canada Place of Work data. 2025 and forecast prepared by Watson & Associates Economists Ltd.

Figure 5-9b
Town of Orangeville
Scenario 2: Expansion Scenario
Employment Forecast 2025 to 2076



Notes: Figures have been rounded. The population used to calculate the activity rate includes a net Census undercount. Statistics Canada 2021 Census employment data has been reviewed. Accordingly, Watson & Associates Economists Ltd. developed a 2025 employment base using a range of sources.

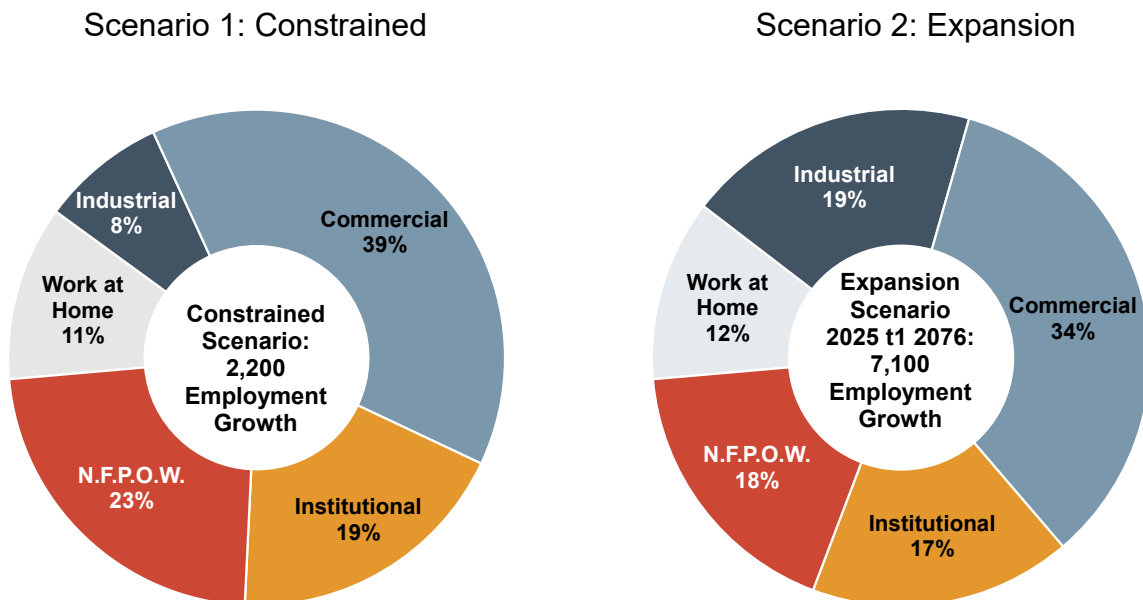
Source: Historical 2006 to 2016 data from Statistics Canada Place of Work data. 2025 and forecast prepared by Watson & Associates Economists Ltd.



Figure 5-10 provides further details regarding the employment growth forecast by place of work and major employment sector for the Town of Orangeville for the Constrained and Expansion Scenarios. Additional details regarding the long-term employment forecast are provided in Appendix C. Key findings are as follows:

- Under the Constrained Scenario, 66% of job growth is anticipated to have a usual place of work (i.e. industrial, commercial or institutional sector job), while the remaining 34% of new jobs are associated with work at home employment or off-site employees. The industrial land supply is anticipated to be built out prior to 2041.
- Of the total additional jobs forecast over the long-term planning horizon to 2076 under the Expansion Scenario, 70% have a usual place of work, while 30% are associated with work at home or off-site employment. With respect to employment by major sector, approximately 81% of job growth for the Town is associated with services-producing sectors, while 19% of jobs are associated with goods-producing sectors (i.e., industrial and primary employment sectors).

Figure 5-10
Town of Orangeville
Recommended Employment Growth Forecast by Place of Work



Note: Figures have been rounded and may not add precisely. N.F.P.O.W. means no fixed place of work.

Source: Watson & Associates Economists Ltd.



6. Opportunities to Accommodate Residential and Non-Residential Development

This chapter provides an overview of Orangeville's potential to accommodate future housing and employment growth through its designated residential, commercial, and Employment Area lands, including opportunities arising from active applications and remaining vacant sites.

6.1 Housing Supply Potential

The following section assesses Orangeville's capacity to accommodate future housing growth, including opportunities for residential intensification. The Town has vacant residential units that are approved, in review, under review and remaining vacant lands within the D.G.A. In addition, potential housing units can be accommodated through residential intensification, primarily infill and vacant lots. It is important to note that a comprehensive review of intensification opportunities has not yet been completed, and therefore, potential redevelopment sites were not identified as part of the G.M.S. As part of the Official Plan Review (O.P.R.), it is recommended that the Town build on the analysis provided herein and further identify additional intensification opportunities, including those achievable through redevelopment.

6.1.1 *Estimated Total Housing Supply Potential*

Orangeville has approximately 60 hectares (148 acres) of vacant gross developable land area on lands designated for residential use and has approximately 2,890 housing units on land currently designated for residential (approved, in review, under review and remaining vacant) across the Town, as illustrated in Figure 6-1. This includes 1,770 housing units that are unbuilt in registered and draft-approved plans, 947 housing units in review, 54 housing units under appeal, and an estimated 116 housing units on the remaining vacant lands. Of the total housing units on vacant designated residential lands (1,770 housing units), approximately 60 housing units (3%) are low density, 530 housing units (30%) are medium density, and 1,180 housing units (67%) are high density.



Figure 6-1
Town of Orangeville
Residential Unit Potential on Vacant Designated Lands

Status	Low-Density Housing Units ^[1]	Medium-Density Housing Units ^[2]	High-Density Housing Units ^[3]	Total Housing Units
Approved (Draft Approved/ Registered Unbuilt)	59	532	1,179	1,770
In Review	127	150	670	947
Under Appeal	-	54	-	54
Remaining Vacant	45	71	-	116
Total	231	807	1,849	2,887
Housing Mix (%)	8%	28%	64%	100%

^[1] Includes single and semi-detached houses.

^[2] Includes back-to-back townhouses and street townhouses.

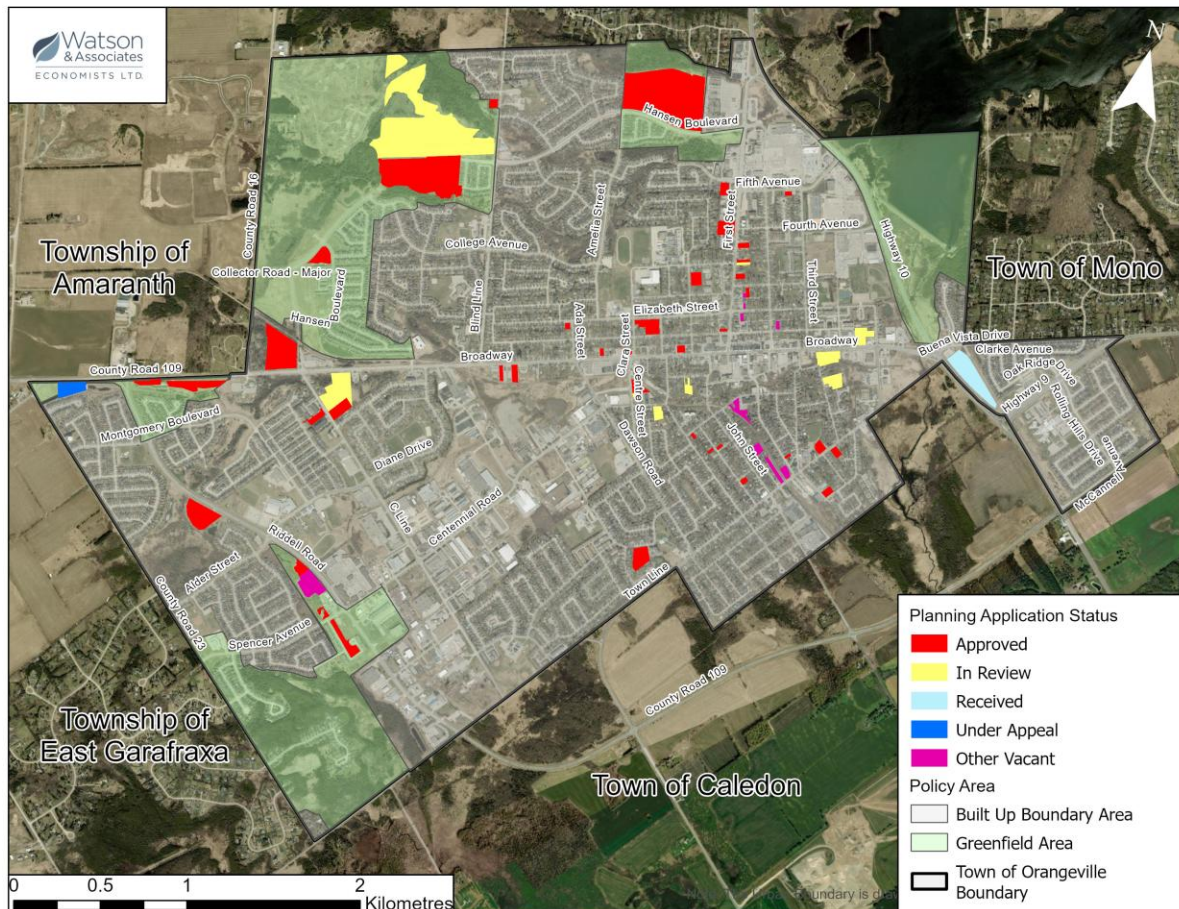
^[3] Includes stacked townhouses and apartments.

Source: Based on Town of Orangeville development approvals information as of mid-2025. The estimate of housing units remaining on vacant land is provided by Watson & Associates Economists Ltd.

Figure 6-2 provides a map of the vacant designated residential land supply within Orangeville. The map illustrates the status of vacant land and the location of supply relative to policy areas, including the B.U.A. and the D.G.A. Of the vacant supply opportunities within the Town, approximately 38% of the housing unit potential is within the B.U.A. and 62% is within the D.G.A.



Figure 6-2
Town of Orangeville
Map of Designated Vacant Residential Land Supply



Source: Watson & Associates Economists Ltd., based on geographic information systems data obtained from the Town of Orangeville.

6.2 Housing Unit Supply Potential within the Built-Up Area

Housing unit supply opportunities in Orangeville and the corresponding housing unit potential by planning status are summarized in Figure 6-3. As shown, the B.U.A. has approximately 18 hectares (44 acres) of vacant, gross, developable residential land and can accommodate approximately 1,100 housing units. As previously noted, a detailed intensification assessment has not been carried out. The intensification opportunities do



not include housing supply opportunities through redevelopment. Other key highlights include the following:

- The housing supply within the B.U.A. consists of 444 housing units in approved plans, 650 housing units in review, and 5 housing units on vacant lands with no active application. Generally, the supply within the B.U.A. indicates that most future housing potential is tied to active development applications.
- Vacant sites within the B.U.A. are generally small infill parcels ranging from under 1 hectare to approximately 2 hectares.
- The housing supply opportunities within the B.U.A. reflect a strong emphasis on higher-density housing opportunities, with 86% as high-density housing opportunities.
- Residential supply opportunities within the B.U.A. are estimated to provide an average of 61 housing units per net hectare (25 units per net acre).

Figure 6-3
Town of Orangeville
Housing Unit Supply Potential in the Built-Up Area (B.U.A.)

Status	Low-Density Housing Units ^[1]	Medium-Density Housing Units ^[2]	High-Density Housing Units ^[3]	Total Housing Units	Net Land Area (hectares)	Units Per Hectare
Approved (Registered Unbuilt/Draft Approved)	7	109	328	444	7	61
In Review	-	35	615	650	11	61
Under Appeal	-	-	-	-	0	0
Remaining Vacant	-	5	-	5	0.1	55
Total B.U.A.	7	149	943	1,099	18	61
Housing Mix (%)	1%	14%	86%	100%	-	-

^[1] Includes single and semi-detached houses.

^[2] Includes back-to-back townhouses and street townhouses.

^[3] Includes stacked townhouses and apartments.

Source: Based on Town of Orangeville development approvals information as of mid-2025. The estimate of housing units remaining on vacant land is provided by Watson & Associates Economists Ltd.



6.3 Supply Opportunities within the Designated Growth Area

6.3.1 Housing Unit Potential and Land Supply

Figure 6-4 provides a summary of the housing unit supply potential and the corresponding gross developable land supply (excluding environmental features) within the D.G.A. As shown in Figure 6-4, the D.G.A. contains approximately 42 hectares (approximately 100 acres) of vacant gross developable land, supporting a potential yield of 1,790 housing units.

The housing supply reflected in the figure includes the following unit mix by status:

- 1,330 housing units in approved plans;
- 300 housing units in review;
- 50 housing units under appeal; and
- 110 housing units on vacant lands with no active applications.

Vacant site opportunities within the D.G.A. range in size from less than 1 hectare to approximately 13 hectares, indicating that the remaining development potential largely consists of developing subdivisions and small-scale greenfield opportunities. Of the total housing unit potential, 242 units (13%) are low-density, 658 units (32%) are medium-density, and 906 units (64%) are high-density, demonstrating a strong emphasis on medium- and high-density housing forms.

The average planned density across the D.G.A. is 42 units per hectare (17 units per acre), although this varies by planning status. Approved plans exhibit the highest densities, averaging 69 units per hectare (28 units per net acre), while lands under review and vacant parcels show lower densities, reflecting their capacity to accommodate a broader mix of future housing forms.



Figure 6-4
Town of Orangeville
Housing Unit Supply Potential in the Designated Growth Area (D.G.A.)

Status	Low-Density Housing Units ^[1]	Medium-Density Housing Units ^[2]	High-Density Housing Units ^[3]	Total Housing Units	Land Area (hectares)	Units per hectare
Approved (Registered Unbuilt/Draft Approved)	52	423	851	1,326	19	69
In Review	127	115	55	297	19	16
Under Appeal	-	54	-	54	1	47
Remaining Vacant	45	66	-	111	3	37
Total D.G.A	224	658	906	1,788	42	42
Housing Mix %	13%	37%	51%	100%	-	-

Source: Based on Town of Orangeville development approvals information as of mid-2025. The estimate of housing units remaining on vacant land is an estimate by Watson & Associates Economists Ltd.

6.4 Employment Lands Supply

Orangeville's vacant employment land inventory was developed based on employment land inventory provided by Town staff and using geographic information systems (G.I.S.) based mapping software with various mapping overlays, including O.P. designations and orthophotos. Vacant designated employment lands were identified as those that fall under the O.P. designation of "Industrial." Figure 6-5 summarizes the vacant employment land supply for Orangeville as of August 2025.

As illustrated, Orangeville has 40 hectares of vacant Employment Area land, while approximately 80% of the designated Employment Area land supply is already developed. Developed employment lands in Orangeville include a range of sectors, such as manufacturing, warehousing and logistics, construction-related services, and light industrial uses. These sectors form the backbone of the Town's industrial base and support regional economic activity.



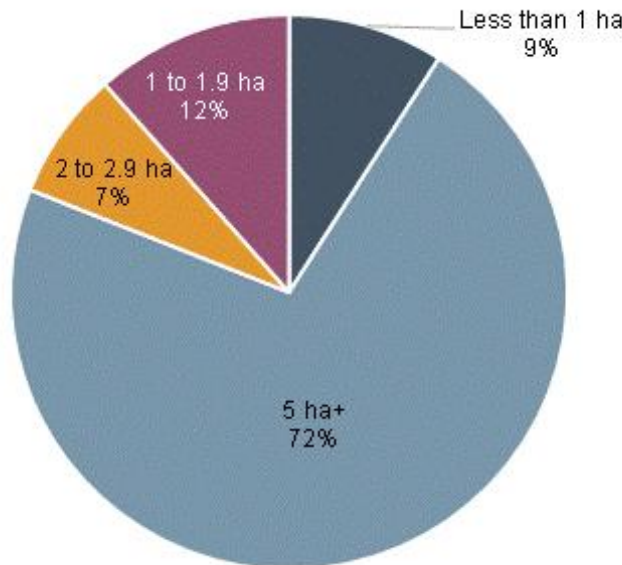
Figure 6-5
Town of Orangeville
Designated Developed and Vacant Employment Land Supply

Land Area Type	Area (hectares)	Share of Land Area
Vacant Land Area	38	19%
Developed Land Area	159	81%
Total Area	197	100%

Source: Based on Town of Orangeville land inventory information as of mid-2025. The estimate of housing units remaining on vacant land is an estimate by Watson & Associates Economists Ltd.

Out of the 13 vacant parcels, one parcel represents 72% of the supply located in the northwest corner of Orangeville. Figure 6-6 illustrates that the majority of Orangeville’s vacant employment land is concentrated in large parcels of 5 hectares (12 acres) or more, which account for 72% of the supply. Smaller parcels make up the remainder: 2 to 2.9 hectares (7%), 1 to 1.9 hectares (12%), and less than 1 hectare (9%).

Figure 6-6
Town of Orangeville
Designated Vacant Employment Land Supply by Parcel Size

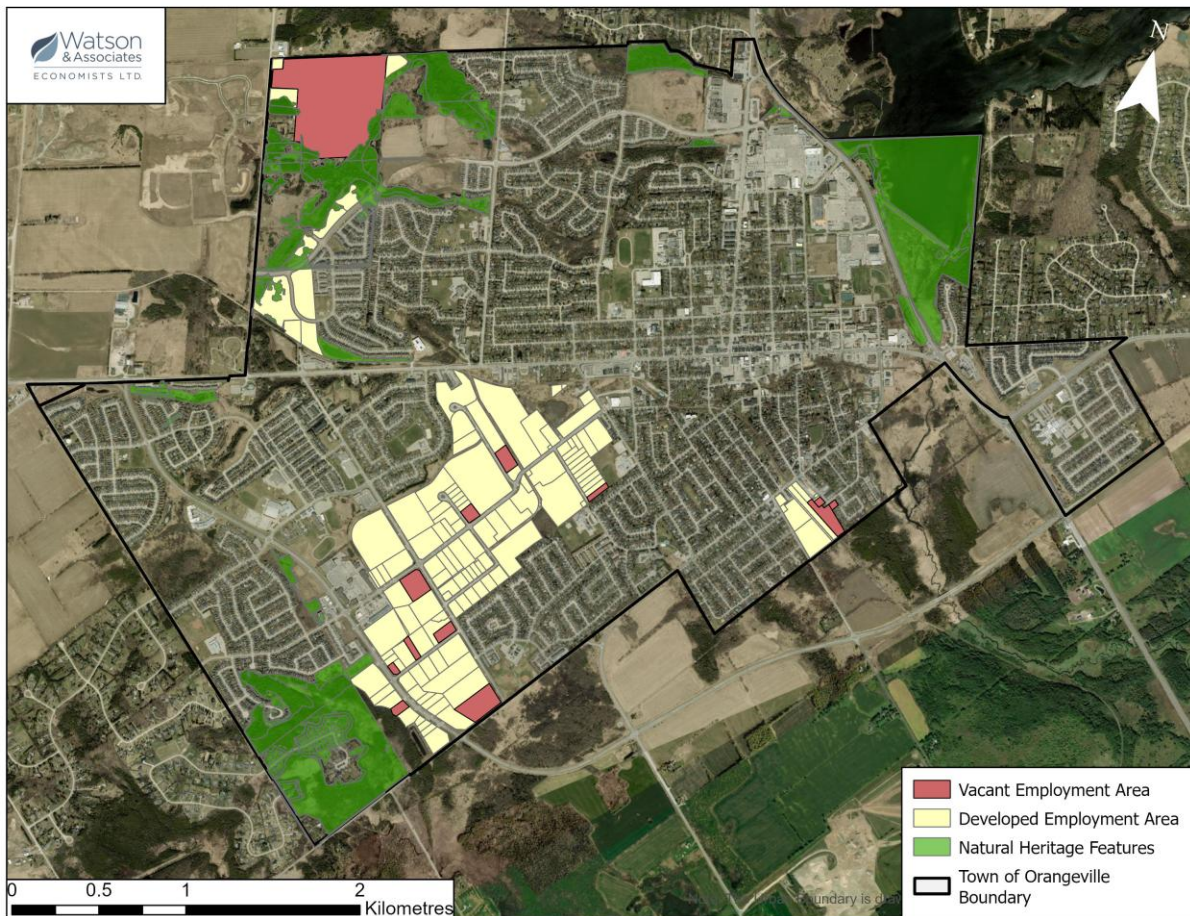


Source: Watson & Associates Economists Ltd., 2025.



Figure 6-7 illustrates the distribution of designated employment lands within Orangeville, highlighting both vacant and developed parcels in relation to the municipal boundary and surrounding natural heritage features. As shown on the map, the majority of the vacant employment land supply is concentrated in the northwest portion of the Town with one large parcel. The remaining vacant parcels are smaller and located primarily within the established Employment Area in the southwest.

Figure 6-7
Town of Orangeville
Map of Designated Employment Land Supply



Source: Watson & Associates Economists Ltd., 2025.



6.5 Employment Area Removal Review

6.5.1 Provincial Policy Direction

Under the updated provincial definition of Employment Area, the Town of Orangeville, along with all Ontario municipalities, is now required to plan for and protect lands intended for industrial uses based on a more narrowly defined set of criteria.

Employment Areas are limited to uses that are primarily industrial in nature, along with directly associated or ancillary uses.^[1]

With the P.P.S., 2024, municipalities now have greater flexibility to initiate Employment Area removals, formerly referred to as conversions, at any time rather than only through a Municipal Comprehensive Review (M.C.R.) or O.P.R.^[2] Applications for Employment Area removals may also be submitted by private applicants at any time and are not restricted to the O.P.R. process. Lands that do not meet the new Employment Area definition are no longer protected under provincial policy and may be considered for residential, commercial, mixed-use, or institutional uses.

Municipalities across Ontario are proactively reviewing their Employment Area designations as part of their O.P.R. process to ensure alignment with the updated definition. This review includes the development of a clear evaluation framework for assessing Employment Area removals that may be initiated by private landowners. As part of the Town's O.P.R., Orangeville will need to develop such a framework and complete a comprehensive review of its current inventory of Employment Area lands.

6.5.2 Site Context and Overview

For the purposes of this G.M.S., Watson undertook an assessment of the vacant Employment Area lands located in northwest Orangeville. Figure 6-8 illustrates the location of these lands at the northwestern edge of the Town, adjacent to the Township of Amaranth to the west and the Town of Mono to the north. In total, this area comprises

[1] Provincial Planning Statement, 2024, definitions, p. 34.

[2] Under the former Growth Plan (Places to Grow), 2019, a Municipal Comprehensive Review is defined as a new Official Plan, or an Official Plan Amendment, initiated by an upper- or single-tier municipality under section 26 of the *Planning Act* that comprehensively applies the policies and schedules of this Plan.

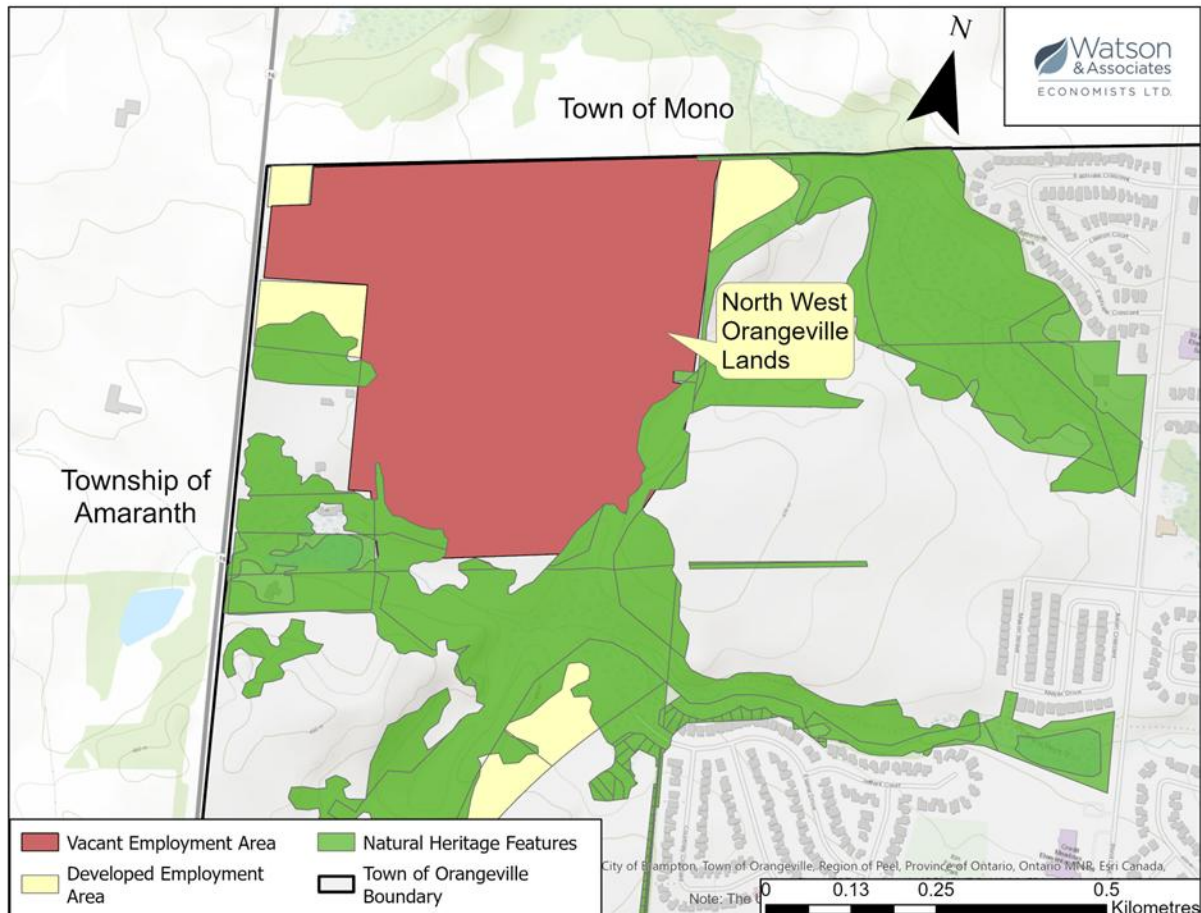


approximately 27 hectares of designated Employment Area, representing more than two-thirds of the Town's vacant Employment Area land supply.

To the west of subject site, beyond County Road 16, the surrounding area consists of agricultural and rural residential uses within the Township of Amaranth, portions of which fall under the policies of the Greenbelt Plan. To the north, the lands continue as agricultural areas within the Town of Mono. To the east and southeast, the context shifts to developing and established low-density residential neighbourhoods within Orangeville, characterized primarily by single detached dwellings. Adjacent developed uses include a utility building to the south (larger yellow parcel along County Road 16 in Figure 6-8), and to the north a small industrial operation located primarily within the Town of Mono (CPD Construction Products), but with one small building within the Town of Orangeville (small yellow parcel in the northwest corner of the Employment Area in Figure 6-8). Aside from this small industrial use, there are no significant industrial or warehouse operations surrounding the subject lands, and overall employment activity in the area is minimal.



Figure 6-8
Town of Orangeville
Northwest Orangeville Employment Area Lands



Source: Watson & Associates Economists Ltd.

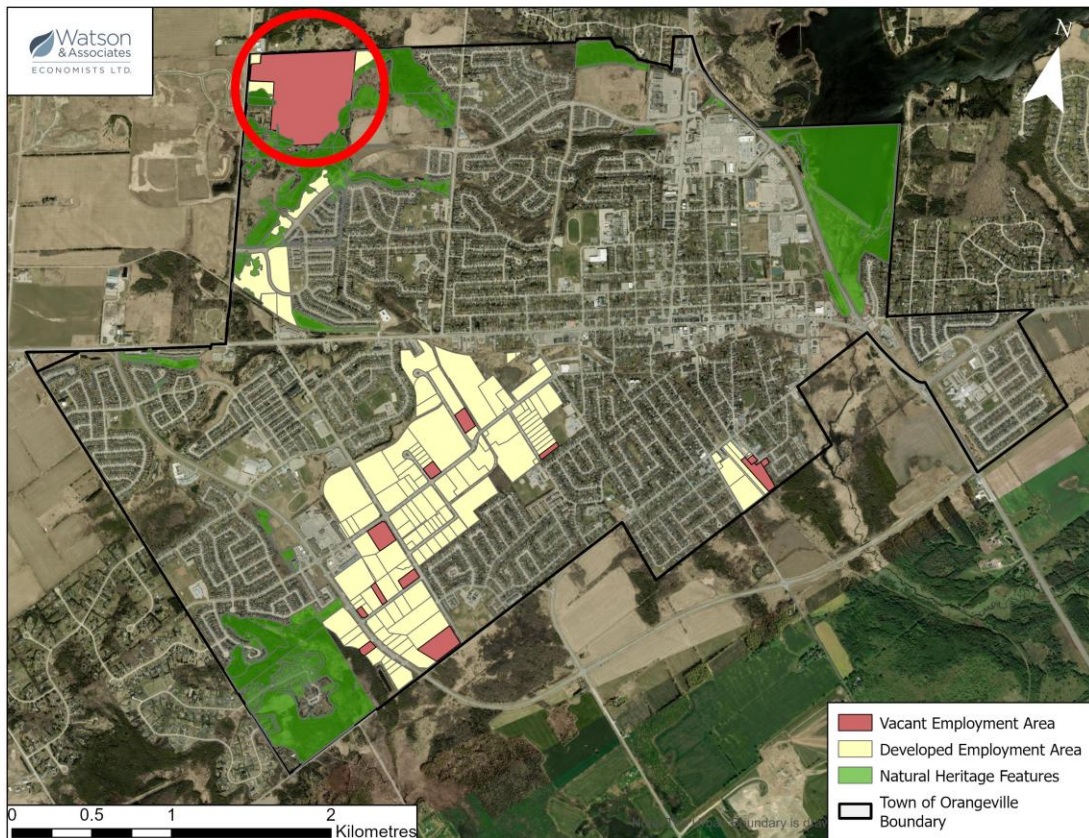
Although these lands are currently undeveloped and lack existing uses that clearly establish an employment or non-employment direction, their suitability to accommodate future Employment Area uses was examined. Given the Town's overall shortfall across all major land use categories, it is important from a growth-management perspective to carefully consider the most appropriate long-term use of these lands.

As illustrated in Figure 6-9, Orangeville's established employment base is concentrated in the southern portion of the Town; as a result, the northwest Employment Area does not function as part of an active industrial cluster and remains physically separated from the Town's primary Employment Areas. Additionally, the limited land area prevents the



site from achieving the critical mass required to support a viable and competitive employment cluster.

Figure 6-9
Town of Orangeville
Subject Employment Area Site



Source: Watson & Associates Economists Ltd.

6.5.3 Key Considerations

The Town faces designated land shortages across residential, commercial, and Employment Area categories. The existing Employment Area in northwest Orangeville presents several limitations. At approximately 27 hectares, the parcel is too small to achieve the critical mass needed for a viable Employment Area. It is not connected to existing Employment Areas, and there is no established industrial base nearby to support future development, which limits its competitiveness within the regional employment market.



From a compatibility and land-use perspective, the site is more appropriately suited for future Community Area purposes. Development could help accommodate residential and commercial growth and contribute to meeting the Town's broader commercial land needs within the existing urban area.

The surrounding context further supports this conclusion. The site has limited frontage on County Road 16, and no northern road connections. Existing development adjacent to the site includes a utility building and a small industrial operation located partly in Orangeville and partly in the Town of Mono. Beyond this isolated use, no significant industrial or warehouse operations are located nearby.

Land uses to the west, north, and east consist largely of rural residences and open lands, which do not contribute to or support an employment cluster. The area is physically and functionally separated from Orangeville's established Employment Area base, which is concentrated in the southern portion of the Town. This isolation limits the site's integration into the Town's wider Employment Area structure.

Overall, the subject lands represent an isolated Employment Area surrounded by rural and residential uses, with limited potential to support future industrial development. Their location, context, and lack of connection to the Town's primary Employment Areas indicate that the lands are better suited to alternative urban land uses.

6.5.4 Recommended Removal and Impact

Watson has adjusted the vacant Employment Area land supply to exclude the Northwest Orangeville Employment Area Removal of 27 hectares, as identified in Figure 6-10. The Town's total vacant land supply is 11 hectares with the adjustment. The land needs assessment discussed later in this report is based on the removal of this vacant Employment Area land site. The land needs assessment will also consider the potential for these lands to accommodate a mix of residential and non-residential (non-industrial) uses.



Figure 6-10
Town of Orangeville
Adjusted Vacant Employment Area Land Supply

Land Area Type	Calculation	Area (hectares)
Unadjusted Vacant Employment Land Supply	A	38
Northwest Orangeville – Recommended for Removal	B	27
Vacant Land Area, Excluding Northwest Orangeville	C = A - B	11

Source: Based on Town of Orangeville land inventory information as of August 2025. The estimate of housing units remaining on vacant land is an estimate by Watson & Associates Economists Ltd.

6.6 Commercial/Mixed Use Lands Supply

Orangeville's vacant commercial/mixed-use land inventory was prepared by Town staff using G.I.S.-based mapping software with various mapping overlays, including O.P. designations and orthophotos. Vacant designated commercial/mixed-use lands were identified as those that fall under the O.P. designation of "Central Business District," "General Commercial," "Neighbourhood Commercial," "Restricted Commercial Residential," and "Service Commercial."

Figure 6-11 summarizes the vacant designated commercial and mixed-use land supply within Orangeville. The table illustrates the distribution of vacant lands by policy area. Of the total 13 hectares of vacant commercial/mixed-use lands, approximately 7 hectares, representing 52% of the total supply, are located within the B.U.A., spread across 17 parcels, while 6 hectares, representing 48% of the total supply, are located within the D.G.A., across 7 parcels. This relatively balanced distribution provides opportunities for both infill and greenfield development, supporting a mix of commercial and mixed-use growth in strategic locations throughout the Town.



Figure 6-11
Town of Orangeville
Vacant Designated Commercial/Mixed-Use Lands

Policy Area	Land Area (hectares)	Parcel Count	Share of Land Area
Built-Up Area	7	17	52%
Designated Growth Area	6	7	48%
Total	13	24	100%

Source: Watson & Associates Economists Ltd., 2025.

Figure 6-12 summarizes the vacant designated commercial and mixed-use lands by commercial area within Orangeville. The largest share of vacant lands is located in the “Other” category, which includes various smaller sites across the Town, totalling 5 hectares across six parcels. Orangeville Square is the largest site, with 3 hectares on a single parcel, offering significant redevelopment potential for retail or mixed-use development.

Other notable areas include Spencer Avenue and Riddell Road Node (1 hectare on 1 parcel), Fifth Street Corridor North (1 hectare on 1 parcel), and the Broadway Corridors East and West, each with 1 hectare spread across multiple parcels, providing opportunities for corridor-based intensification. The Downtown contains nine parcels, totalling 1 hectare, reflecting smaller infill sites suited for mixed-use development in the core. The Orangeville Shopping Centre currently has no vacant land available for development.

This distribution highlights that while some large redevelopment opportunities exist, such as Orangeville Square, most vacant commercial lands are smaller parcels concentrated in the Downtown and along key corridors and provide limitations in supporting a range of commercial uses.



Figure 6-12
Town of Orangeville
Vacant Designated Commercial/Mixed-Use Lands by Commercial Area

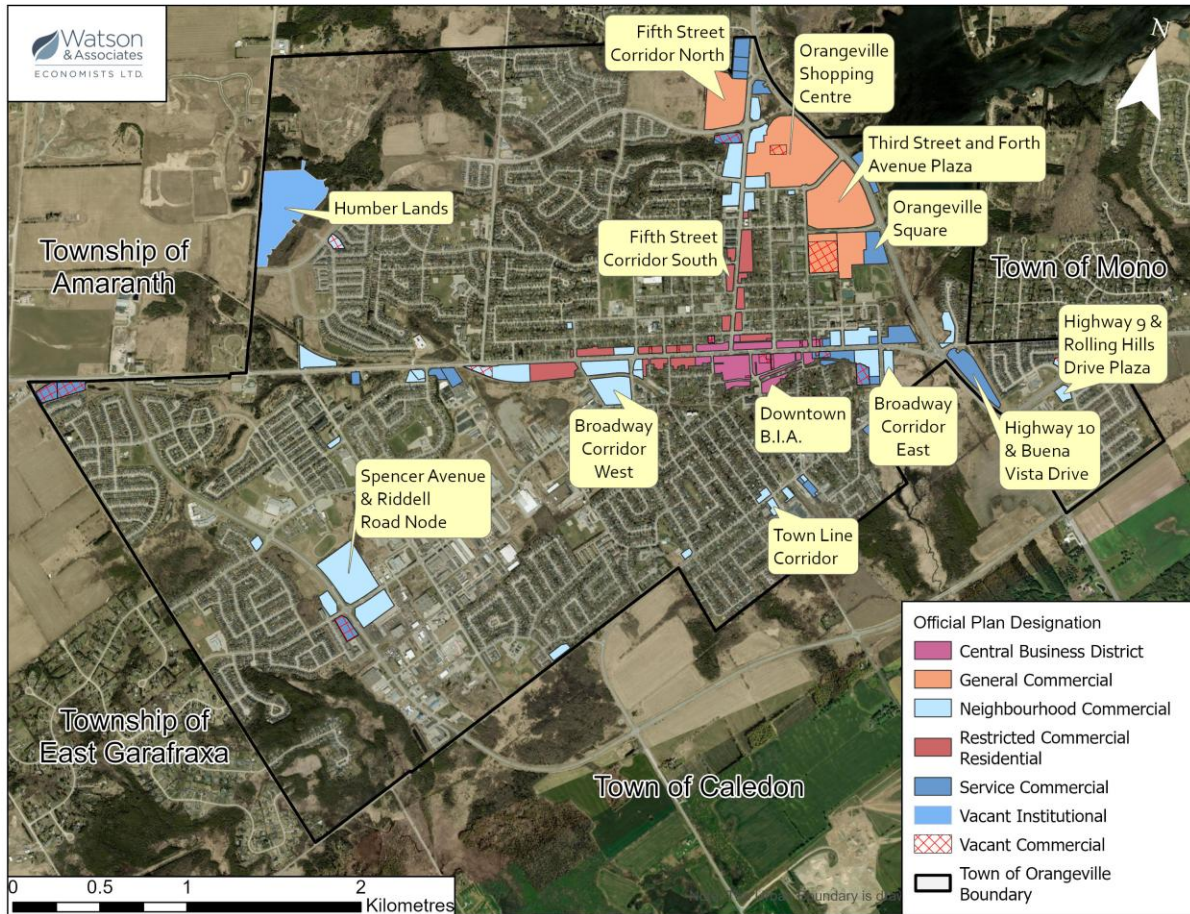
Commercial Area	Land Area (hectares)	Number of Parcels
Spencer Avenue and Riddell Road Node	1	1
Orangeville Square	3	1
Orangeville Shopping Centre	<1	1
Fifth Street Corridor North	1	1
Downtown	1	9
Broadway Corridor West	1	3
Broadway Corridor East	1	2
Others	5	6
Total	13	24

Source: Watson & Associates Economists Ltd., 2025.

Figure 6-13 illustrates the spatial distribution of these designated commercial and mixed-use lands. The map shows vacant parcels concentrated along major corridors such as Broadway and Fifth Street, as well as nodes like Spencer Avenue and Riddell Road. Larger redevelopment opportunities, including Orangeville Square, are located in prominent commercial areas, while smaller parcels are distributed within the Downtown and along key corridors.



Figure 6-13
Town of Orangeville
Map of Vacant Designated Institutional and Commercial Lands



Source: Watson & Associates Economists Ltd., 2025.



7. Residential Land Needs

This chapter summarizes the technical analysis of the Town's residential land needs, drawing on the housing supply opportunities identified in Chapter 6 and the housing growth forecasts outlined in Chapter 5. The assessment is based on the portion of future housing growth allocated to the D.G.A., following assumptions regarding the share of housing units expected to be accommodated through intensification within the B.U.A.

7.1 Approach

The residential land needs assessment has been prepared in accordance with the proposed P.M.G. using Method 2, which is the recommended approach for urban municipalities. Under this methodology, residential land needs are determined by assessing housing requirements within the D.G.A., with a portion of total housing growth allocated through intensification. It should be noted that the P.P.S., 2024, introduces D.G.A. (refer to Chapter 2), which refers to the portion of a Settlement Area identified to accommodate future population and employment growth and/or expansion. These areas generally correspond to the Town's Designated Greenfield Area (D.G.A.) identified in the Town's O.P. but only include the vacant lands within this policy area. For the purposes of this G.M.S. and to be consistent with the Town's O.P., intensification refers to all housing growth accommodated within the B.U.A. Commercial and institutional land needs are then evaluated separately, along with residential needs, to establish the total land requirement for Community Area uses, which include all non-Employment Area land uses.

A key emphasis of the proposed P.M.G. is the need to plan for a diverse range of housing options to support demographic change, market demand and affordability objectives. The methodology also recognizes the importance of incorporating a contingency factor, acknowledging that unforeseen changes in market conditions, development timing or housing preferences may influence future land consumption. This ensures that municipalities maintain sufficient flexibility to accommodate a variety of housing forms and to respond to evolving community needs over the long term.

It is important to note that the P.P.S. 2024 and the proposed P.M.G. require municipalities to assess designated land needs over a 30-year planning horizon for Community Area uses. While this report follows that requirement, it also provides an



assessment of residential land needs over a 50-year period. This extended analysis is included to recognize the Town's long-term growth context, and the need for a municipal boundary adjustment will be required to accommodate urban growth within the initial 30-year period.

Given the time, complexity and coordination involved in annexation, it is important for the Town to plan proactively beyond the minimum 30-year horizon. A longer-term planning perspective will help ensure that future boundary expansions are appropriately sized and that long-term infrastructure planning, including transportation, water, wastewater, stormwater and community facilities, can be aligned with expected growth. By providing both 30-year and 50-year residential land needs, this assessment provides the Town with a more comprehensive understanding of its near-term and long-term Community Area land requirements as it considers future boundary adjustments.

It is important to note that the land supply opportunities for housing have been adjusted based on the proposed Employment Area Removal in Northwest Orangeville, where it is recommended that these lands be converted to land-use designations that support Community Area uses. This provided an additional 27 hectares of designated land for Community Area uses such as residential, institutional and commercial uses.

7.2 Housing Growth Allocation by Policy Area (Designated Growth Area and Built-Up Area)

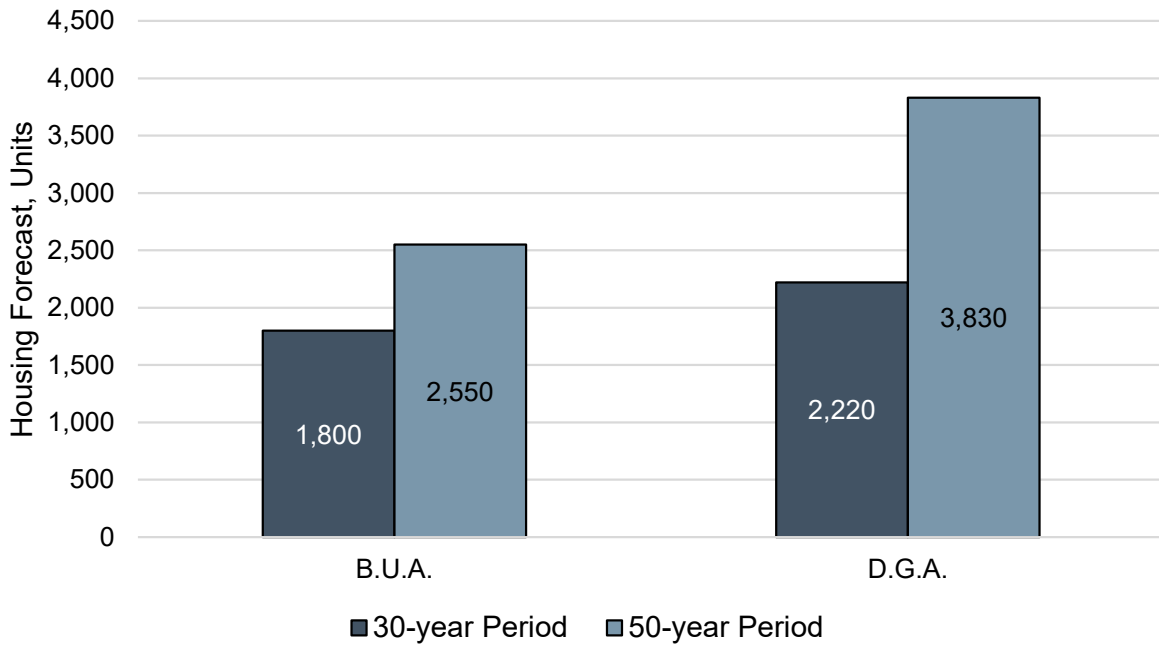
Figure 7-1 illustrates the housing growth allocations between the B.U.A. and the D.G.A. as shown for the 30-year and 50-year planning horizon under Scenario 2 (Expansion Scenario), while Figure 7-2 shows the proportional distribution of growth. Over the 30-year period (2026 to 2056), the Town is anticipated to accommodate 4,020 housing units, representing an average of approximately 134 units per year. Of this total, the B.U.A. accounts for 1,800 housing units (45%), equating to approximately 60 housing units annually, while the D.G.A. is anticipated to accommodate 2,220 housing units (55%), or approximately 74 housing units annually.

Over the longer 50-year horizon from 2026 to 2076, total housing growth increases to 6,380 housing units, representing an average of approximately 128 housing units annually. During this period, the share of growth allocated to the B.U.A. declines to 40% (2,550 housing units), averaging 51 housing units per year, while growth in the D.G.A. increases to 60% (3,830 housing units), averaging 77 housing units per year. It is



important to note that even with the long-term shift, the B.U.A. continues to play an important role in supporting a substantial share of the Town’s annual housing delivery.

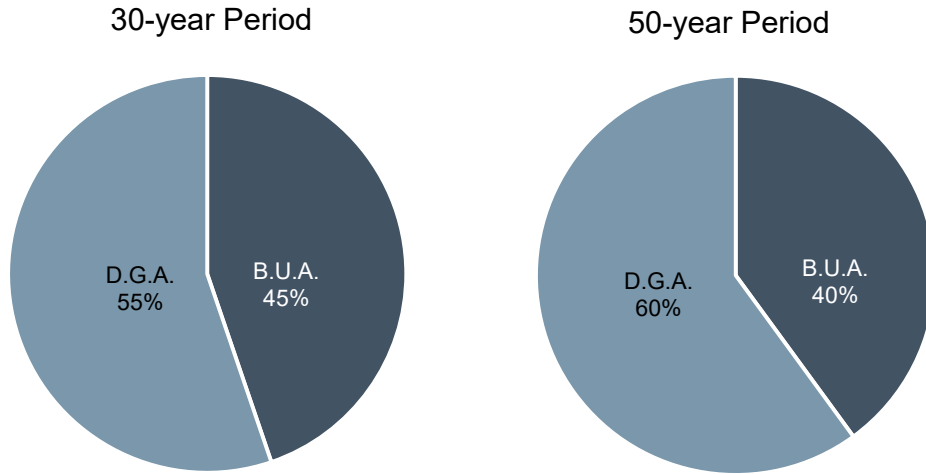
Figure 7-1
Town of Orangeville
Housing Allocation by 30- and 50-Year Period by Policy Area



Note: B.U.A. means Built-Up Area. D.G.A. means Designated Growth Area.
Source: Watson & Associates Economists Ltd., 2025.



Figure 7-2
Town of Orangeville
Housing Allocation by 30- and 50-Year Period by Policy Area



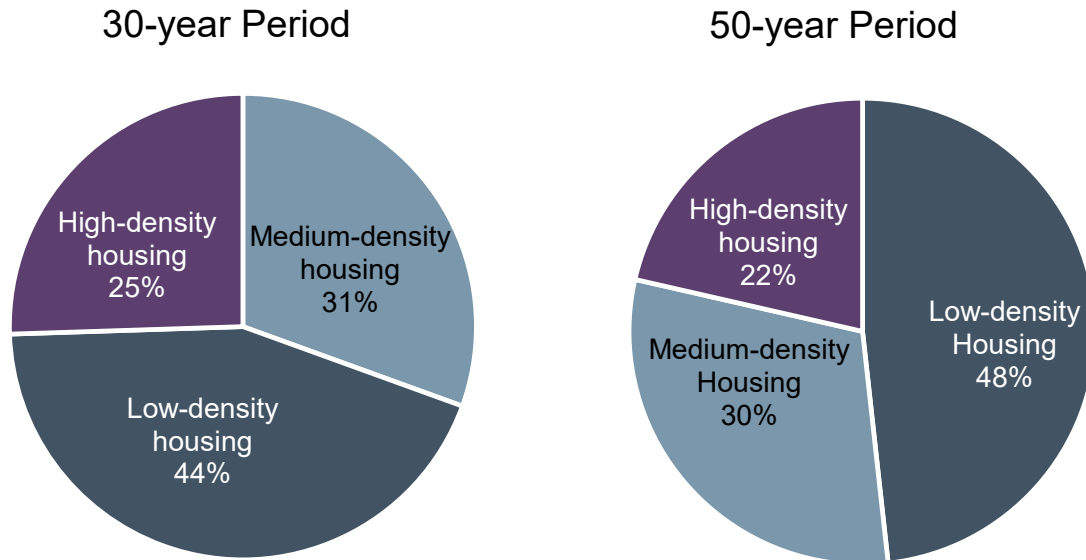
Note: B.U.A. means Built-Up Area. D.G.A. means Designated Growth Area.
Source: Watson & Associates Economists Ltd., 2025.

7.3 Housing Needs in the D.G.A.

Over the 30-year period, the D.G.A. is anticipated to accommodate 2,220 housing units, increasing to 3,830 units over the 50-year period. As shown in Figure 7-3 low-density housing represents a larger share of the housing mix over the 50-year period compared to the 30-year period, resulting in a corresponding decline in the proportional share of medium- and high-density housing. While medium- and high-density units continue to account for a substantial portion of overall housing supply in both periods, the shift in proportions reflects a greater contribution of lower-density housing over the longer-term horizon.



Figure 7-3
Town of Orangeville
30- and 50-Year Housing Unit Mix (Designated Growth Area)



Source: Watson & Associates Economists Ltd., 2025.

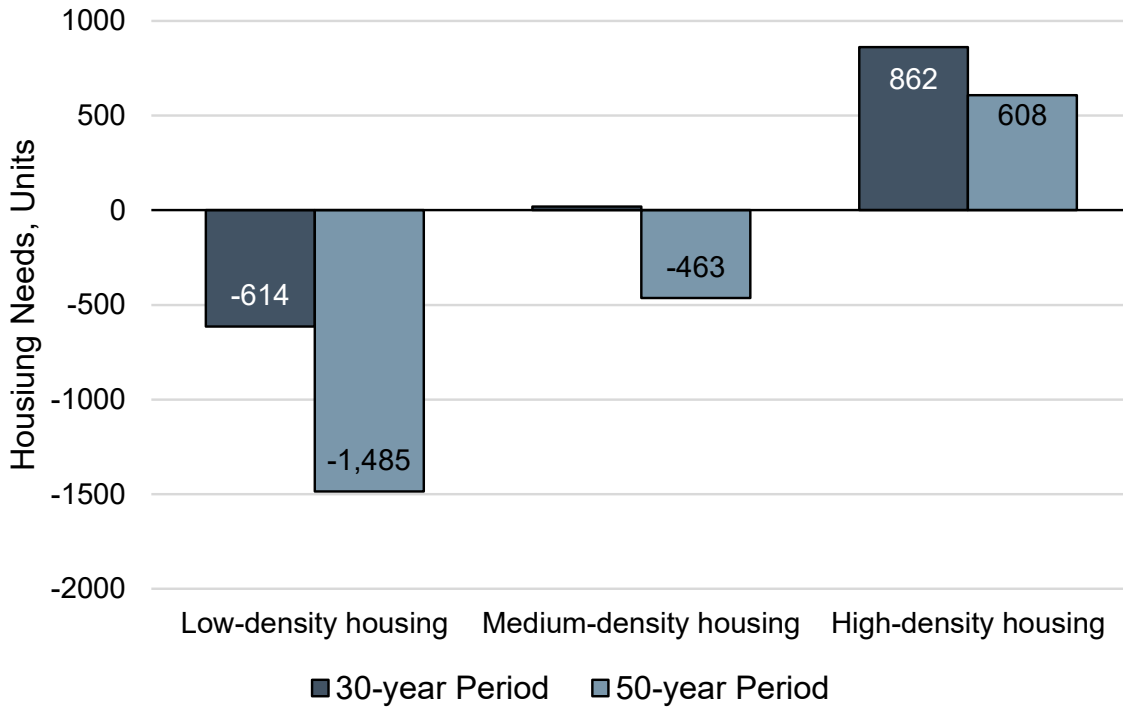
Figure 7-4 illustrates the surplus and shortfall by housing type over the 30-year and 50-year planning horizons. Positive values represent a surplus, while negative values indicate a shortfall. The analysis shows a modest surplus of high-density units across both timeframes, contrasted with notable shortfalls in low-density housing in both the 30-year and 50-year periods, as well as a shortfall in medium-density housing over the 50-year horizon. As previously discussed, the Town has the potential to accommodate approximately 362 low-density housing units, which represents only 37% of the 30-year demand and 20% of the 50-year demand. Based on current supply, it is estimated that low-density housing needs could be met for roughly 11 years, while medium-density needs could be met for approximately 31 years. The Town, however, has a more than sufficient supply to accommodate high-density housing throughout the planning horizon. These findings indicate that future planning efforts should emphasize expanding opportunities for low- and medium-density residential development to better align long-term housing supply with forecast demand.

It is important to note that an adjustment has been made to the housing unit supply opportunities in the D.G.A. based on the proposed Employment Area Removal in Northwest Orangeville, of approximately 27 hectares. Watson estimates that this land



area could accommodate 700 housing units (138 low-density housing units, 128 medium-density housing units and 434 high-density housing units). This has been factored in Figure 7-4 and the preceding figures.

Figure 7-4
Town of Orangeville
30- and 50-Year Housing Unit Shortfall/Surplus by Housing Type



Source: Based on Town of Orangeville land supply information as of August 2025 in active applications provided by planning staff, while the estimate of housing units on vacant lands without an application is an estimate by Watson & Associates Economists Ltd.

7.4 Residential Land Needs Requirements

Figure 7-5 presents a summary of the Town’s residential land requirements over both the 30-year and 50-year planning horizons. As discussed previously, the Town has an insufficient supply of low-density housing unit opportunities to meet forecast demand over the 30-year period, and a shortfall of medium-density housing opportunities over the 50-year period. To quantify the associated land requirements, the housing unit shortfalls have been converted into net land needs using assumed residential densities of 20 units per net hectare for low-density housing, 45 units per net hectare for medium-density housing and 100 units per net hectare for high-density housing. These



assumptions are informed by a review of active development applications within the Town and by observed density trends in comparable municipalities across the G.G.H.

Based on this approach, the Town has a net residential land requirement of approximately 22 hectares over the 30-year period, increasing to approximately 78 hectares over the 50-year horizon. These figures represent net residential land needs, meaning they include only the land required to physically accommodate the housing units themselves at the parcel level. Additional land will be required to support the local infrastructure necessary for complete community development, including internal roads, stormwater management facilities, parks and other public open spaces. These broader community-serving functions are captured through the application of a net-to-gross adjustment factor, which converts net land to gross developable land.

In this analysis, a 70% net-to-gross factor has been applied, meaning an additional 30% of the land area is assumed to be needed to accommodate local infrastructure such as roads, stormwater ponds and parks. This adjustment aligns with typical planning practice for new greenfield community development and ensures that the resulting land area accounts for the full range of components required to support residential neighbourhoods. It is important to note that a separate land needs assessment has been prepared for commercial and institutional uses (discussed in the subsequent chapter). The resulting gross developable land requirement is approximately 29 hectares over the 30-year period and increases to approximately 112 hectares over the 50-year period.

Recognizing the direction provided in the proposed P.M.G. to potentially consider a market contingency, an additional 20% market contingency factor has been applied to the gross residential land requirements. This contingency acknowledges uncertainties in development timing, market preferences and unit mix and ensures the Town maintains flexibility to respond to future housing demand. When the market contingency is applied, the total gross developable residential land requirement increases to 37 gross developable hectares over the 30-year period and 135 gross developable hectares over the 50-year period.



Figure 7-5
Town of Orangeville
Designated Residential Land Needs

Residential Land Needs	Low-density Housing	Medium-density housing	High-density housing	Total Housing Units
30-Year Housing Demand	976	678	566	2,220
50-Year Housing Demand	1,847	1,161	820	3,828
Housing Unit Supply	362	698	1,428	2,488
30-Year Housing Unit Need (Shortfall)/Surplus	-614	20	862	268
50-Year Housing Unit Need (Shortfall)/Surplus	-1,485	-463	608	-1,340
Net Units Per Hectare	20	45	100	-
Net Residential Land Needs, Hectares	-	-	-	-
30-Year	-31	0	9	-22
50-Year	-74	-10	6	-78
Gross Residential Land Needs, Hectares (to account for local infrastructure and parkland)	-	-	-	-
30-Year	-44	1	12	-31
50-Year	-106	-15	9	-112
Additional 20% Market Contingency, Hectares	-	-	-	-
30-Year	-	-	-	-37
50-Year	-	-	-	-135

Source: Watson & Associates Economists Ltd., 2025.



8. Commercial and Institutional Land Needs

This chapter summarizes the technical analysis of the Town's commercial and institutional land needs, drawing on the land supply opportunities identified in Chapter 6 and the employment growth forecast summarized in Chapter 5.

8.1 Approach

Under Method 2 of the proposed P.M.G., the preferred approach for calculating land needs requires that municipalities also assess the commercial and institutional land required to support new residential communities. These supporting uses typically account for an additional 20% to 25% of the gross developable land area in a new community, depending on the community's scale and the existing dynamics of the commercial and institutional base. As a result, it is generally expected that 50% to 55% of the gross developable land base within a new community will be available for residential development, with the balance dedicated to commercial, institutional and other local infrastructure (roads, parks, and stormwater ponds).

In this assessment, commercial and institutional uses encompass a broad range of functions that support day-to-day community needs and contribute to the development of complete communities. Commercial uses include retail establishments, office space and a variety of commercial services that provide goods, employment opportunities and local amenities. Institutional uses include public and private facilities such as medical and health-care services, schools, community centres, libraries and recreational facilities. Together, these commercial and institutional components play a vital role in supporting residential areas and the broader regional area by providing essential services, employment, and community infrastructure that contribute to the overall livability and functionality of new neighbourhoods.

The commercial and institutional land needs summarized in this report represent a high-level assessment intended to inform the broader land needs analysis. This assessment does not evaluate whether the Town's existing commercial and institutional base is sufficient to meet the current residents' needs, nor does it identify any gaps in the existing supply. Instead, the analysis focuses exclusively on the commercial and institutional land required to support future growth associated with new residential development.



As part of the Town's upcoming O.P.R., there will be an opportunity to undertake a more detailed examination of the adequacy of the existing commercial and institutional base. That work may include an assessment of service gaps, opportunities to strengthen the existing land-use structure and policy directions regarding the appropriate balance and distribution of commercial and institutional uses within the Town over the long term. Furthermore, this additional work would provide valuable insights into the types of commercial and institutional uses the Town should seek to attract in order to better support future job growth and community needs.

8.2 Commercial and Institutional Employment Forecast

The Town of Orangeville functions as the primary commercial and institutional service centre for Dufferin County and surrounding rural municipalities. Its strategic location, concentration of services and established urban structure enable the Town to serve both its local population and a broader regional catchment area. Orangeville's commercial base is diverse and well developed, encompassing a range of retail formats and service-oriented uses that support daily needs, higher-order shopping and employment opportunities. These include large-format retail and service commercial uses, community-scale retail plazas, and a traditional downtown featuring specialty retail, restaurants, and personal services. The Town also accommodates a significant base of business and professional services that support both local residents and the wider region.

In addition to its commercial role, Orangeville is home to several major institutional uses that reinforce its function as a regional centre. These include health-care services, public administration offices, educational facilities and a range of community and recreational amenities. Collectively, these commercial and institutional functions underpin Orangeville's role as the focal point for service delivery in Dufferin County, drawing residents from neighbouring communities for shopping, employment, health care, education and recreational opportunities. This strong institutional and commercial foundation also provides an important context for planning future land needs, ensuring new growth areas are aligned with the Town's long-standing role within the regional urban structure.

Commercial activity is spatially concentrated along established corridors and nodes rather than dispersed throughout the Town. A map of the designated commercial land



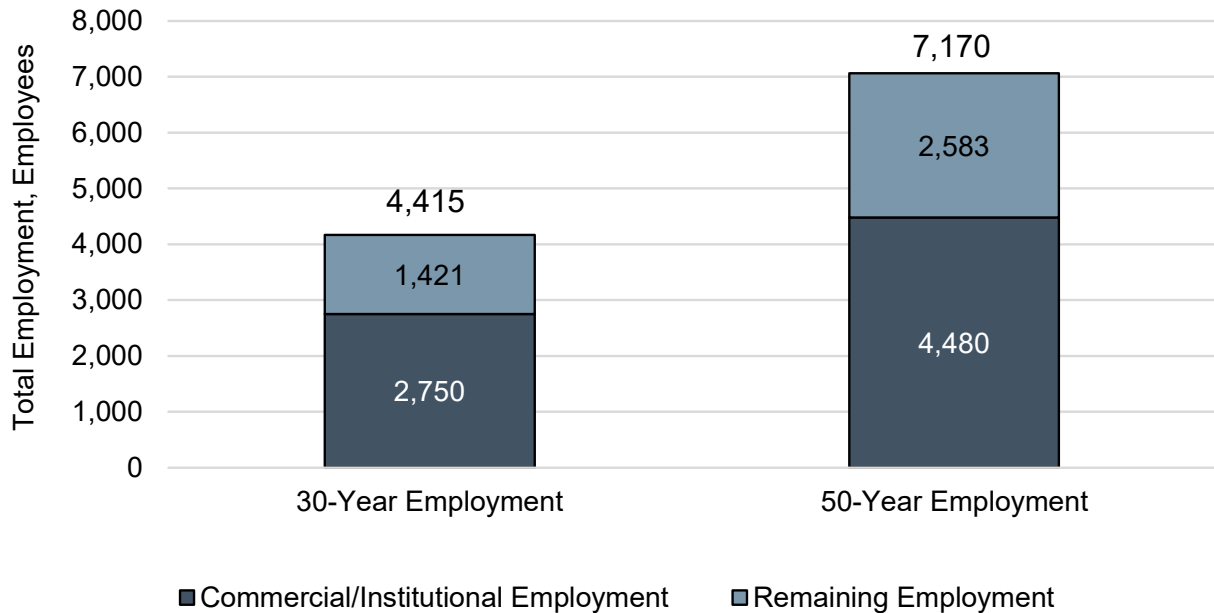
supply was previously provided in Chapter 6. The primary commercial structure is organized as follows:

- The historic downtown and main street commercial area along Broadway, which functions as the Town's primary retail spine;
- Larger format and highway-oriented commercial uses along the Fifth Avenue corridor and in proximity to Highway 10;
- Key retail nodes including the Orangeville Mall area and plaza developments along the Fifth Street corridor; and
- Secondary commercial nodes at major intersections such as Spencer Avenue and Riddell Road.

As summarized in Figure 8-1, commercial and institutional employment is anticipated to represent a consistent majority of total employment over the planning horizon. Over the 30-year period, the Town is forecast to accommodate approximately 2,750 commercial and institutional jobs, accounting for 62% of the total 4,415 jobs. By the 50-year horizon, commercial and institutional employment is anticipated to increase to approximately 4,490 jobs, representing 63% of the total 7,170 jobs forecast. This stable share reflects the strong relationship between population growth and demand for retail, health care, education, and other community-serving uses, as discussed in earlier sections of this report.



Figure 8-1
Town of Orangeville
30- and 50-Year Total Employment by Employment Type



Source: Based on Town of Orangeville land supply information as of August 2025, provided by planning staff, while the estimates by Watson & Associates Economists Ltd.

8.3 Commercial and Institutional Land Requirements

Based on the forecast commercial and institutional employment growth, the Town of Orangeville is anticipated to require additional developable land to accommodate future demand for commercial and institutional uses. Figure 8-2 provides the calculation of the commercial and institutional land needs. Key highlights are discussed below.

- It is assumed that 25% of commercial and institutional employment will be accommodated through intensification of existing sites, through expansion of existing facilities, small infill and redevelopment opportunities. Over the 30-year period, approximately 690 jobs will be accommodated through intensification, increasing to 1,120 jobs over the 50-year period. As part of the Town’s upcoming O.P.R., it is recommended that the Town explore opportunities to accommodate intensification, including not only non-residential uses but also residential uses through mixed-use development.



- Adjusted for intensification, approximately 2,060 commercial and institutional jobs will need to be accommodated on vacant sites over the 30-year period, increasing to roughly 3,360 jobs over the 50-year horizon.
- The commercial and institutional employment demand is then translated into a net land area using an employment density assumption of 50 jobs per net hectare. Applying building coverage ratios between 25% to 30% (the ratio of the site occupied by building footprint), the resulting non-residential building floor space per worker is estimated to range from 50 to 60 sq.m per worker. This corresponds to an average implied floor space index of approximately 0.25 to 0.30, consistent with typical low-rise commercial and institutional development patterns in greenfield settings. It is important to note that the building typology requirements will vary, and it is assumed that some multi-storey non-residential buildings or mixed-use buildings will be required.
- Commercial uses are expected to exhibit relatively high land utilization due to their more compact built form and higher employment density, whereas many institutional uses generally require more extensive land areas for amenities such as open space, recreation areas and on-site storage. As a result, institutional activities tend to operate at lower built-form intensities and, correspondingly, at higher land consumption per employee.
- It is estimated that the Town has approximately 24 hectares of vacant land available to accommodate commercial and institutional employment demand. This estimate incorporates the additional opportunities created through the proposed Employment Area removal in Northwest Orangeville. It is assumed that the conversion of the Northwest Orangeville lands to Community Area uses could provide up to 11 hectares of developable area suitable for mixed-use (e.g., commercial at-grade and high-density residential uses above), commercial and institutional uses. These lands would supplement the Town's broader supply of Community Area land and support the long-term provision of services, amenities and employment opportunities within the urban structure.
- Over the 30-year horizon, the Town will require an additional 18 net hectares of commercial and institutional lands, increasing to 44 net hectares over the 50-year horizon.
- In terms of gross developable land, which includes the land required for commercial and institutional uses as well as local infrastructure such as roads, the total gross developable land requirement is estimated at 22 hectares over the 30-year planning horizon and increases to 54 hectares over the 50-year period.



- Similar to the residential land needs assessment, a 20% market contingency factor has been applied to the commercial and institutional land requirements. This contingency recognizes that planning for new communities must allow flexibility to accommodate a range of commercial and institutional uses, respond to evolving market conditions, and reflect uncertainties related to development timing, land availability and changes in service needs. The contingency ensures that sufficient land is safeguarded to support a complete and diverse mix of commercial and institutional functions as the community grows.

Figure 8-2
Town of Orangeville
30- and 50-Year Commercial/Institutional Land Requirement

Commercial and Institutional Land Needs	Commercial and Institutional	Intensification (25%)	Less Intensification
30-Year Employment	2,750	690	2,060
50-Year Employment	4,480	1,120	3,360
Employment Density (jobs per net hectare)	-	-	50
30-Year Land Demand	-	-	41
50-Year Land Demand	-	-	67
Land Supply, hectares	-	-	24
Net Non-Residential Land Needs	-	-	-
30-Year Net Land Shortfall, hectares	-	-	-18
50-Year Net Land Shortfall, hectares	-	-	-44
Gross Non-Residential Land Needs	-	-	-
30-Year Gross Developable Shortfall, hectares	-	-	-22
50-Year Gross Developable Shortfall, hectares	-	-	-54
Gross Non-Residential Land Needs - Market Contingency	-	-	-
Adjusted 30-Year Gross Developable Shortfall, hectares	-	-	-26
Adjusted 50-Year Gross Developable Shortfall, hectares	-	-	-65

Source: Watson & Associates Economists Ltd., 2025.

An important focus in the next phase of work will be assessing opportunities to accommodate the long-term commercial and institutional land needs identified. These uses play a central role in shaping complete communities by providing essential goods, services and public amenities that support daily life for existing and future residents. Commercial and institutional areas also reinforce Orangeville's function as a regional service centre, supporting higher-order retail, health care, education, recreation and



public administration for residents of Dufferin County and the surrounding region. Ensuring an adequate supply of well-located commercial and institutional lands will help sustain this role, diversify the Town's employment base and enhance local economic resilience by providing a wide range of job opportunities beyond industrial uses. As the Town considers future land use planning directions, identifying sites that can integrate smoothly with surrounding neighbourhoods, support convenient access for residents, and accommodate a range of service-oriented and institutional functions will be essential to strengthening the Town's urban structure and maintaining a high quality of life for the community.



9. Employment Area Land Needs

This chapter summarizes the technical analysis of the Town's Employment Area land needs, drawing on the land supply opportunities identified in Chapter 6 and the employment growth forecast summarized in Chapter 5.

9.1 Approach

As discussed in Chapter 6, the provincial policy direction established through the P.P.S., 2024, requires municipalities to plan and designate Employment Areas primarily for industrial-type uses. Under this updated definition, Employment Areas are intended to accommodate activities such as manufacturing, warehousing and logistics, construction-related operations and other industrial functions. While commercial and institutional uses may be permitted within Employment Areas, they must be clearly secondary and supportive of the primary industrial function. Examples include small-scale ancillary offices, retail outlets associated with industrial operations and other service-based uses that directly support industrial employment, where permitted by the Town's zoning and land use policies.

In accordance with both the P.P.S., 2024 and the proposed P.M.G., Watson has assessed the land requirements needed to support Employment Area growth over the 30-year and 50-year planning horizons. Unlike Community Area land uses, which are restricted to a 30-year land needs assessment, municipalities are permitted under the P.P.S., 2024, to plan for Employment Area lands beyond the 30-year timeframe. This reflects the long-term nature of industrial development, the large and often complex infrastructure investments required to serve Employment Areas, and the need to ensure a stable, long-term supply of industrial land to support economic growth and competitiveness. Furthermore, as discussed previously, given the complex nature of planning for a municipal boundary adjustment, a 50-year horizon has been considered.

9.2 Employment Area Forecast

9.2.1 Existing Employment Area Context

The Town's Employment Areas are primarily concentrated within a single, well-established industrial district located in the southwest portion of Orangeville, along Centennial Road and C-Line. This primary Employment Area contains approximately



159 hectares of gross employment land and accommodates the Town's largest and most mature concentration of industrial activity. Its strategic location along the arterial road network, including Centennial Road and Town Line, enables industrial traffic and goods movement to access the area efficiently without travelling through established residential neighbourhoods, thereby minimizing land use conflicts and supporting safe and efficient operations.

Development within the primary Employment Area is characterized by low- to mid-rise, low-coverage industrial built form, including manufacturing, warehousing, distribution, transportation-related uses and industrial service functions. The Town's industrial base is broadly diversified, with established sectors such as plastics and rubber manufacturing, food processing, automotive-related manufacturing, packaging, warehousing and logistics. This diversity contributes to the stability and resilience of Orangeville's employment structure and reinforces the area's long-standing regional economic role.

Beyond this core district, the Town contains three smaller employment pockets within the Town. These areas provide local employment opportunities but are limited in size and do not function as major industrial clusters. As noted in Chapter 6, approximately 27 hectares of vacant designated Employment Area land are located in the northwest corner of the Town. These lands are physically separated from the primary industrial area, lack connection to the Town's established employment base and were assessed separately through the Employment Area removal analysis. For the purposes of the Employment Area land needs assessment, these lands have been excluded.

9.2.2 Employment Area Outlook and Growth Potential

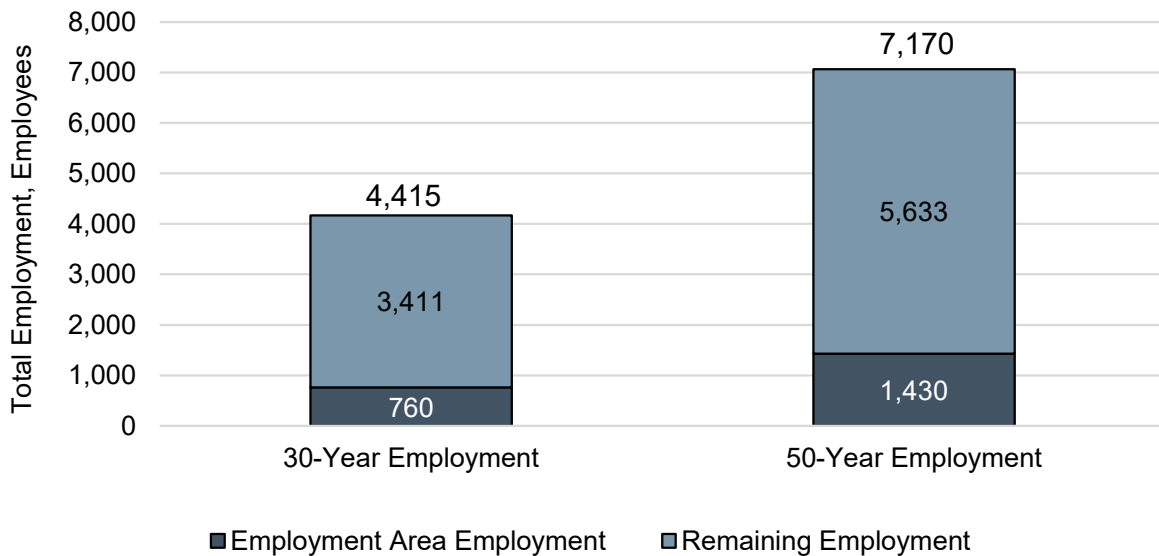
Employment Area jobs are anticipated to represent a stable share of total employment growth over the forecast horizon, as illustrated in Figure 9-1. By the 30-year horizon, Employment Areas are anticipated to accommodate approximately 980 jobs, representing 22% of the 4,415 total jobs forecast. By the 50-year horizon, Employment Area employment increases to approximately 1,560 jobs, maintaining the same 22% share as total employment reaches 7,170 jobs.

Over the forecast period, industrial activity in Orangeville is expected to align with both provincial policy direction and the Town's economic development priorities. The P.P.S., 2024 places strong emphasis on protecting and intensifying Employment Areas for industrial-type uses, including advanced manufacturing, export-oriented production and



goods-movement functions. Similarly, the Town’s Economic Development Strategy and Business Retention and Expansion initiatives identify target sectors such as advanced and value-added manufacturing, food processing and packaging, automotive-related production and industrial-supporting professional and technical services. These sectors reflect the types of industrial employment expected to occupy the Town’s Employment Areas over the 30- and 50-year planning horizons.

Figure 9-1
Town of Orangeville
30- and 50-Year Total Employment by Employment Type



Source: Watson & Associates Economists Ltd., 2025.

9.3 Employment Area Land Requirements

Based on forecast Employment Area job growth, additional Employment Area land will be required to accommodate future industrial development in the Town of Orangeville. Figure 9-2 illustrates the additional land required over the 30-year and 50-year period. Summarized below are key highlights.

- It is assumed that a small portion of Employment Area growth, approximately 5%, will be accommodated through intensification. This would primarily occur through expansions or redevelopment of existing industrial sites.



- After accounting for intensification, it is estimated that approximately 720 Employment Area jobs over the 30-year period and 1,360 jobs over the 50-year period will need to be accommodated on vacant Employment Area lands.
- To translate this employment demand into land requirements, a density assumption of 15 jobs per net hectare has been applied. This density reflects the anticipated range of industrial-type uses expected within the Town's Employment Areas, including logistics, warehousing, and various forms of manufacturing. These uses typically exhibit lower employment densities due to larger building footprints, extensive outdoor storage needs and site circulation requirements.
- The total net Employment Area land requirement is estimated to be approximately 48 hectares over the 30-year planning period, increasing to 91 hectares over the 50-year horizon.
- It is estimated that the Town has approximately 11 hectares of vacant designated Employment Area land. To reflect long-term market conditions and the reality that a portion of Employment Area lands typically remain undeveloped due to ownership, parcel configuration or market readiness constraints, a long-term vacancy adjustment of 15% has been applied. After applying this adjustment, the effective vacant land supply is reduced to approximately 9 hectares, representing the amount of land available to support future Employment Area development.
- As a result of the calculations described above, the Town is estimated to have a net shortfall of approximately 39 hectares of Employment Area land over the 30-year planning period. This shortfall increases to approximately 81 hectares over the 50-year horizon. These figures reflect the gap between the amount of land required to accommodate forecast Employment Area job growth and the effective supply of vacant Employment Area land available for development.
- To determine the gross developable land requirement, an adjustment has been applied to account for the additional land needed to accommodate local infrastructure such as roads, parks and stormwater management facilities. Watson applied an 80% net-to-gross relationship, meaning that an additional 20% of land is assumed to be required for these supporting infrastructure components. After applying this adjustment, the gross developable Employment Area land requirement is approximately 46 hectares over the 30-year planning period and increases to approximately 98 hectares over the 50-year period. This reflects the total land base needed to support industrial development, including both developable parcels and the infrastructure necessary to service and access them.



- A 20% market contingency factor has been applied to the Employment Area land needs to ensure that the Town maintains sufficient flexibility to respond to long-term industrial market conditions. Incorporating a market contingency is an important component of long-range Employment Area planning because it provides a buffer that enables the Town to accommodate unanticipated land absorption and to respond to emerging economic opportunities.
- With the application of the 20 percent contingency, the total gross developable Employment Area land requirement increases from the initial estimate to approximately 56 hectares over the 30-year planning horizon, rising to approximately 117 hectares over the 50-year period.

Figure 9-2
Town of Orangeville
30- and 50-Year Employment Land Requirement

Employment Area Land Needs	Calculation	30-Year	50-Year
Employment Area Growth, Employees	A	760	1,430
Employment Growth Less Intensification (5%)	$B = A \times 95\%$	720	1,360
Employment Density (jobs/net ha)	C	15	15
Employment Area Land Demand, Net hectares	$D = B / C$	48	91
Employment Area Land Supply, Net hectares	E	11	11
Employment Area Land Supply, Less Long-Term Vacancy Adjustment (15%), Net hectares	$F = E \times 85\%$	9	9
Employment Area Land Needs, Net hectares	$G = F - D$	(39)	(81)
Employment Area Land Needs, Gross Developable hectare	$H = G \times 120\%$	(46)	(98)
Employment Area Land Needs - Market Contingency Added	$I = H \times 120\%$	(56)	(117)

Source: Watson & Associates Economists Ltd., 2025.

As part of the next phase of work, a key consideration will be to identify and evaluate opportunities to accommodate the Town's long-term Employment Area land needs. This will require assessing potential locations capable of supporting a critical mass of industrial activity, with sufficient size, servicing capacity and access to the regional transportation network to ensure long-term competitiveness. Establishing a cohesive and strategically located Employment Area will be essential for attracting investment, supporting targeted industrial sectors and ensuring that Orangeville can compete effectively within the regional employment market.



10. Location Expansion Area Options

10.1 Approach in Selecting Study Areas

As part of this G.M.S., the Consultant Team has explored preliminary opportunities to expand Orangeville's corporate boundary in all directions. This initial review found that expansion to the north and east into the Town of Mono is significantly constrained by key environmental features, a lack of major transportation routes, and the presence of established urbanized areas such as Purple Hill. To the south, within the Town of Caledon, the provincial Greenbelt imposes substantial constraints on the potential configuration of the gross developable land area. In contrast, areas to the west, within the Townships of Amaranth and East Garafraxa, contain large, contiguous land blocks with fewer environmental constraints, offering greater flexibility in configuring the gross developable area.

10.2 Study Areas Overview

Figure 10-1 provides a map identifying three potential Study Areas selected for evaluation to accommodate long-term growth and future land needs. The Study Areas are generally located to the east and southeast, west and southwest and south of the existing Town of Orangeville municipal boundary.

Collectively, the three Study Areas contain over 1,100 hectares of gross developable land (net of Natural Heritage System and environmental features), with individual Study Areas ranging from 336 to 410 hectares. It is important to note that each Study Area exceeds the minimum requirement of 317 gross developable hectares needed to accommodate growth over a 50-year horizon. As a result, the Study Areas collectively provide ample land supply and an appropriate level of contingency to support long-term planning needs. The Study Areas include the following, with a directional estimate of gross developable land area, which will be further reviewed.

- Study Area 1 (Caledon): up to 410 hectares
- Study Area 2 (Amaranth): up to 340 hectares
- Study Area 3 (East Garafraxa): up to 336 hectares

Each Study Area is influenced to varying degrees by Natural Heritage System features, which affect the gross developable land base and overall expansion potential. It is



important to note that the land areas referenced above represent gross developable area, which excludes identified environmental features. As part of any annexation process, it is recommended that the Town also incorporate environmental features that may separate or fragment gross developable areas to ensure a contiguous municipal boundary. The next step in the G.M.S. will involve delineating the Study Areas using an appropriate configuration. Furthermore, the G.M.S. will involve a comprehensive evaluation of the Study Areas using a range of criteria, including market conditions, planning considerations, environmental constraints, and infrastructure requirements. Figure 10-2 provides a summary of the Study Areas, including contextual and site information.

Figure 10-1
Potential Expansion Study Areas

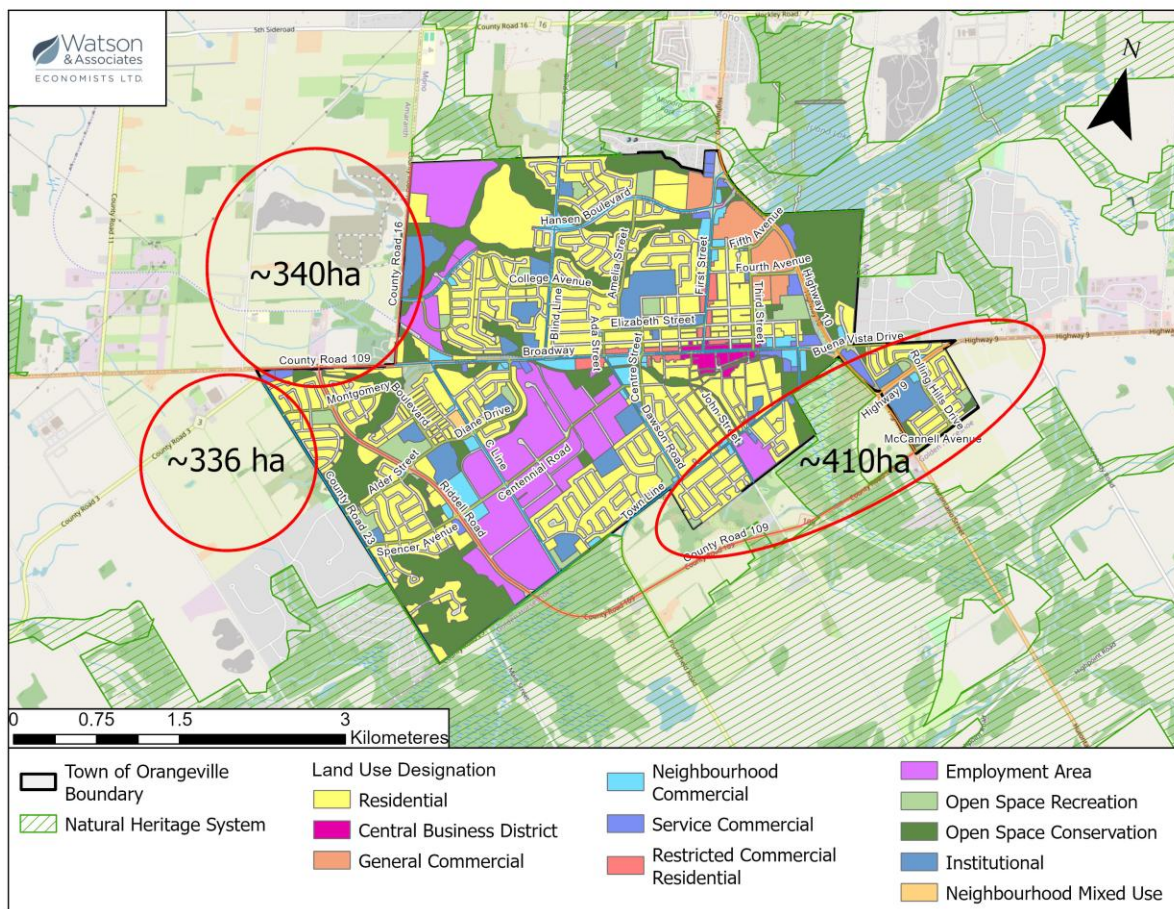




Figure 10-2
Summary of Expansion Study Areas

Criteria	Study Area 1	Study Area 2	Study Area 3
Municipality	Town of Caledon	Township of Amaranth	East Garafraxa
Geographic Direction from Town	South East	West	South West
Gross Developable Land Area (hectares)	~410 hectares	~341 hectares	~336 hectares
Adjacent Official Plan Designations in Orangeville	<ul style="list-style-type: none"> Residential Open space Institutional Employment Area 	<ul style="list-style-type: none"> Residential Employment Area (Recommended to be removed as Employment Area) 	<ul style="list-style-type: none"> Residential Open space Institutional
Current Official Plan Designation in the Respective Municipality	<ul style="list-style-type: none"> Rural Lands Natural Heritage 	<ul style="list-style-type: none"> Employment Use Countryside Area Natural Heritage 	<ul style="list-style-type: none"> Employment Use Countryside Area Natural Heritage
Existing Occupied Uses	<ul style="list-style-type: none"> Scattered rural residential Agricultural Uses 	<ul style="list-style-type: none"> Rural Industrial Uses Scattered rural residential Agricultural Uses 	<ul style="list-style-type: none"> Industrial Building Community Hub building for Township Scattered rural residential Agricultural Uses
Surrounding Uses	<ul style="list-style-type: none"> Commercial Corridor along Highway 9 (Mono) Rural and agricultural lands 	<ul style="list-style-type: none"> Rural and agricultural lands 	<ul style="list-style-type: none"> Rural and agricultural lands
Access to Major Roads	County Road 109 / Highway 9	Highway 9 / County Road 16 / County Road 109	County Road 109 / Highway 9



10.3 Next Steps

The next phase of the G.M.S. will focus on developing a comprehensive evaluation framework with a series of criteria to guide the assessment of each Study Area. Using this framework, the Consultant Team will undertake a detailed analysis to evaluate the relative merits, opportunities, and constraints of each Study Area from market, land-use planning, infrastructure, agricultural, and environmental perspectives. This assessment will provide the basis for identifying the most suitable location for future municipal boundary expansion to be further explored in more detail.

The preferred Study Area will be further examined in greater depth through additional technical analyses. This will include a review of municipal financial implications, infrastructure servicing requirements, and land-use planning considerations to ensure that the preferred expansion area is both feasible and supportive of the Town's long-term growth objectives. These detailed assessments will provide the foundation for informed decision-making as Orangeville advances toward a recommended municipal boundary expansion.

Appendices



Appendix A

Applicable Planning Policy Context



Appendix A: Applicable Planning Policy Context

Appendix A provides additional details related to section 2.1 on how the growth forecast and land needs assessment approach used for this study is consistent with the requirements of the Provincial Planning Statement, 2024 (P.P.S, 2024), and Proposed Projection Methodology Guideline (P.M.G.). The Appendix also provides details regarding relevant County and local planning policy.

Provincial Planning Statement, 2024

On August 19, 2024, the Province released the P.P.S., 2024, which replaces the Provincial Policy Statement, 2020 (P.P.S., 2020) and a Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (the Growth Plan) as an integrated document. The P.P.S., 2024 came into effect on October 20, 2024, and was released in coordination with Bill 185, *Cutting Red Tape to Build More Homes Act*.

A key focus of the P.P.S., 2024 is that it recognizes that the approach to delivering housing needs and Employment Area land need requirements will vary by municipality and, as such, moves away from a prescriptive guideline-based approach. The following summarizes key highlights of the P.P.S., 2024.

Planning for Growth

- Compared to the P.P.S., 2020, the P.P.S., 2024 presents a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Additionally, it allows for planning of infrastructure, public service facilities, strategic growth areas, and Employment Areas to extend beyond this time horizon.^[1] As such, this suggests that municipalities are to designate land to accommodate growth for at least 20 years, but not more than 30 years, with the opportunity to designate additional land beyond the 30-year time horizon for Employment Areas, strategic growth areas, and planning for infrastructure.^[2]
- The P.P.S., 2024 requires municipalities to consider population and employment growth forecasts prepared using Ministry of Finance (M.O.F.) projections and

^[1] Provincial Planning Statement, 2024, policy 2.1.3, p. 6.

^[2] Ibid.



allows municipalities to modify these forecasts as appropriate.^[1] The use of M.O.F. forecasts is not meant to replace long-term forecasting by municipalities, but the forecasts are to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations. This approach was carried out for this study.

- According to the P.P.S., 2024, Minister's Zoning Orders (M.Z.O.s) are to be treated as "in addition to projected needs" over the planning horizon. In planning for M.Z.O. lands, the P.P.S., 2024 states that these lands must be incorporated into the O.P. and related infrastructure plans.^[2]
- Since M.Z.O. lands are not tied to an assessment of need, it is understood that, when planning for these lands, the timing of their buildout is not held to a targeted minimum or maximum planning horizon. As such, it is recognized that full development of M.Z.O.s may or may not extend beyond the 30-year maximum planning horizon set out in the proposed P.P.S., 2024, subject to anticipated economic growth and real estate market demand within the municipality and the broader economic region over the horizon of the plan. In view of this, it is recommended that the timing of development regarding approved M.Z.O.s should be established through provincial and local phasing policies, municipal servicing plans, and reviewed through regular monitoring.
- The P.P.S., 2024 introduces the concept of "large and fast-growing municipalities," which are listed in Schedule 1 of the P.P.S., 2024. These municipalities are encouraged to plan for a target of 50 residents and jobs per gross hectare in designated growth areas.^[3] This density target represents a minimum, and municipalities are encouraged to go beyond these minimum targets, where appropriate.^[4] Furthermore, large and fast-growing municipalities are to consider watershed planning in planning for storm, sewage, and water servicing.^[5]
- Density targets in the P.P.S., 2024 are noted as minimum standards and municipalities are encouraged to go beyond these minimum targets, where appropriate.

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

[2] Ibid.

[3] Ibid., policy 2.3.1.5, p. 8.

[4] Ibid., policy 6.1.13, p. 33.

[5] Ibid., policy 4.2, p. 22.



- The P.P.S., 2024 provides direction in planning for complete communities. This direction has been refined from the P.P.S., 2020 and requires that municipalities plan for an appropriate range and mix of land uses, housing options, transportation options with multimodal access, employment, public service facilities and other institutional uses (including schools and associated child care facilities, long-term care facilities, places of worship, and cemeteries), recreation, parks and open space, and other uses to meet long-term needs. Furthermore, municipalities need to ensure that efforts are made to improving access for all members of the community and to reducing barriers.

Planning for Housing

- Generally unchanged from the P.P.S., 2020, the P.P.S., 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated and available for residential development within the regional market area.^[1]^[2] It is noted, however, that the emphasis on intensification and redevelopment in this regard has been removed. Planning authorities are also required to maintain at all times, where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans within the regional market area.^[3]
- The P.P.S., 2024 requires municipalities to establish and maintain minimum targets for intensification and redevelopment within built-up areas (B.U.A.), based on local conditions.^[4] Furthermore, municipalities are required to keep their zoning by-laws up to date by establishing minimum densities, heights, and other standards to accommodate growth and development.^[5]

^[1] Provincial Planning Statement, 2024, policy 2.1.4, p. 6.

^[2] According to the Provincial Planning Statement, 2024, "designated and available" refers to lands marked in the Official Plan for urban residential use. In municipalities requiring more detailed Official Plan policies (such as secondary plans) before development applications can be approved, only lands that have started the detailed planning process are considered designated and available.

^[3] According to the Provincial Planning Statement, 2024, upper or single-tier municipality, or planning area, will normally serve as the regional market area.

^[4] Provincial Planning Statement, 2024, policy 2.3.1.4, p. 8.

^[5] Ibid., policy 6.1.6, p. 32.



- For the purposes of this analysis, it is recommended that the B.U.A. continues to be referred to the boundary delineated by the Province in 2006. Although the term “built-up area” is no longer defined in the P.P.S., 2024, the policies allow flexibility in how intensification is approached and measured. Based on a review of policy framework, however, it is appropriate for the Town of Orangeville to continue to refer to this geographic area when identifying the location of intensification areas. Within the B.U.A., the primary focus of intensification will be in strategic growth areas, including major transit station areas (M.T.S.A.s) and nodes and corridors, which will contribute to most of the intensification target.

No Significant Policy Change and Approach to Planning for Affordable Housing

- The P.P.S., 2024 carries forward a similar definition of affordable housing as established in the P.P.S., 2020. The definition of affordable housing in the P.P.S., 2024, however, is based on the municipality instead of the regional market area as defined in the P.P.S., 2020. Additionally, the P.P.S., 2024 carries forward the requirement of “establishing and implementing minimum targets for the provision of housing that is affordable to low- and moderate-income households.”^[1] The P.P.S., 2024 does not address the issue of attainable housing, an issue that was also lacking in the P.P.S., 2020.

Settlement Area Boundary Expansions

- According to the P.P.S., 2024, a Settlement Area boundary expansion (S.A.B.E.) is allowed at any time and without the requirement of an M.C.R., provided that the S.A.B.E. meets the criteria established in policy 2.3.2.1. The criteria include establishing the need to designate and plan for additional land to meet an appropriate range and mix of land uses, supported by infrastructure and public facilities, while limiting the impact on agricultural areas. Furthermore, the S.A.B.E. is to support a phased progression of urban development. Overall, the policies allow for a simplified and flexible approach for municipalities to undertake an S.A.B.E.^[2]

^[1] Provincial Planning Statement, 2024, policy 2.2.1, p. 7.

^[2] Ibid., policy 2.3.2, p. 9.



Planning for Employment

- Unchanged from the P.P.S., 2020, major office and major institutional development should be directed to M.T.S.A.s or other strategic growth areas where frequent transit service is available, according to the P.P.S., 2024.^[1]
- The P.P.S., 2024 includes an updated definition of Employment Area based on the amendment of the *Planning Act* on June 8, 2023. The *Planning Act* was amended under subsection 1 (1) to include a new, more narrowly scoped definition of “area of employment.” This definition of Employment Area has been revised to include only industrial-type employment as a primary use. The amendment to the *Planning Act* received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the *Planning Act* came into effect on October 20, 2024, in concert with the P.P.S., 2024.
- According to the P.P.S., 2024, municipalities are to assess and update Employment Areas identified in Official Plans (O.P.s) to ensure that this designation is appropriate to the planned function of Employment Areas.^[2]
- The P.P.S., 2024 requires that municipalities designate, protect, and plan for all Employment Areas in Settlement Areas by:
 - planning for the long-term needs of Employment Area uses;
 - prohibiting residential uses, commercial uses, public service facilities, other institutional uses, and retail and office uses not associated with the primary employment use; and
 - providing an appropriate transition to adjacent non-Employment Areas to ensure land use compatibility and economic viability.^[3]
- Under the P.P.S., 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Previously, under the P.P.S., 2020 and the Growth Plan, municipalities were only permitted to make changes to designated Employment Areas during an M.C.R. or Comprehensive Review. Under the P.P.S., 2024, municipalities are required to demonstrate that there is an identified need for the removal and that the land is not required for Employment Area uses over the long term. Furthermore, municipalities need to demonstrate that the proposed change from Employment

[1] Provincial Planning Statement, 2024, policy 2.8.1.4, p. 13.

[2] Ibid., policy 2.8.2.4, p. 14.

[3] Ibid., policy 2.8.2.3, p. 14.



Area to a non-Employment Area use does not undermine the overall viability of the Employment Area.^[1]

- The P.P.S., 2024 requires that all development within 300 metres of Employment Areas shall avoid, or mitigate, potential impacts on the “long-term economic viability” of employment uses.^[2] This means that when planning for Employment Areas or other uses in proximity to Employment Areas, municipalities must ensure there is an appropriate transition between Employment Areas and sensitive uses like residential uses where necessary. This acknowledges that the delineation of the Employment Area does not necessarily protect uses on the edge of the Employment Area which may require separation from sensitive uses.
- While the P.P.S., 2024 requires an appropriate separation between Employment Area uses and sensitive uses, it also provides the opportunity for manufacturing, small-scale warehousing, and other industrial uses to be accommodated outside of Employment Areas where there are no adverse effects to being located near a sensitive use. It notes that, if there is an opportunity, these uses are to be encouraged in strategic growth areas and other mixed-use areas where frequent transit service is available.^[3]

Removal of Planning Responsibilities for Upper-Tier Municipalities

- Under Bill 185, the Region of Halton, the Region of Peel, and the Region of York became “upper-tier municipalities without planning responsibilities” as of July 1, 2024; the Regions of Durham and Waterloo followed on January 1, 2025. The Region of Niagara followed these preceding municipalities on March 31, 2025. We anticipate there will continue to be a strong need for impacted upper-tier municipalities to address regional growth management coordination efforts (e.g., coordination of local municipal growth forecasts, assessment of regional infrastructure needs, and review of cross-jurisdictional issues) working with their area municipalities. It is acknowledged that Dufferin County and the Town of Orangeville are not affected by this legislation.

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

[2] Ibid., policy 2.8.1.3, p. 13.

[3] Ibid., policy 2.8.1.2, p. 13.



Proposed Provincial Methodology Guidelines

On August 11, 2025, the Province released a proposed Provincial Projection Methodology Guideline (P.M.G.) to support the implementation of the P.P.S., 2024 with regard to carrying out long-range forecasts and land need assessments. The Province is currently seeking comments on the proposed P.M.G. with the comment period ending October 11, 2025. Once finalized, this proposed P.M.G. document would replace the existing P.M.G. released in 1995.

Before the P.P.S., 2024 took effect, a separate Land Needs Assessment Methodology for the Greater Golden Horseshoe (G.G.H.) was used to implement the “A Place to Grow: Growth Plan for the Greater Golden Horseshoe.” Although this methodology was specifically designed for the G.G.H., its core principles and approaches were widely considered best practices and were often used by municipalities outside the G.G.H. for their land needs assessments. The proposed P.M.G. document includes elements that are very similar to those of the former Land Needs Assessment Methodology for the G.G.H.

According to the Province, the P.M.G. is meant to support policy implementation but cannot add to or detract from the policies of P.P.S., 2024. In addition, the proposed guidance is not intended to address the location of new settlement areas, the location of expansions to settlement areas, the location of employment areas, or the suitability of whether a particular area of land should be included or removed from an Employment Area. These matters are to be addressed through other relevant policies.^[1]

The P.M.G. document includes the following components:

- Establishing Municipal Population Projections
- Developing Housing Needs Forecasts
- Developing Employment Forecasts
- Land Needs Assessment
- Implementation

[1] ERO Posting Notice: <https://ero.ontario.ca/notice/025-0844/>



Upon reviewing the proposed P.M.G. document, Watson has determined that the approach used for this study is consistent with its requirements. Our key observations on the proposed P.M.G. document as it relates to this study are provided below

Chapter 1: Introduction

- The P.M.G. states that population growth projections are informed by the P.P.S., 2024, specifically Policy 2.1.1 and 2.1.2. which are discussed in Chapter 2.1.1 of this report. In developing the growth forecast, the Ontario M.O.F. Population Projections for Ontario, the G.G.H. Outer Ring and the Dufferin County C.D. were reviewed in Chapter 5 of this study. The population forecast to 2051 established in this study for Orangeville is consistent with the 2025 M.O.F. projections for the Dufferin County C.D. to 2051.^[1]

Chapter 2: Establishing Municipal Population Projection:

- Population Step 1 of the P.M.G. establishes the approach for municipal projections. Municipalities are guided to disaggregate the C.D. forecast established through Policy 2.1.1 of the P.P.S. by developing a lower and upper population projection range based on two recommended methods. Population share (Method A) is based on a municipality's population share of the C.D., and growth share (Method B) is based on the municipality's share of population growth within the C.D. Municipalities also have the flexibility to modify their projection based on local conditions.
- Population Step 2 of the P.M.G. states that a population projection by age cohort needs to be developed to inform the development of housing forecasts. The P.M.G. recommended approach to forecast population by age group is based on an extrapolation of consecutive five-year periods within the previous 10 years. An alternative approach based on the more complex cohort-survival model, which accounts for births, death and net migration, may also be undertaken.
- This study utilizes the cohort-survival forecast methodology, with further details provided in Appendix B. The population forecast is based on a number of supply

^[1] It is important to note that P.M.G. Population Step 2 states that “MOF projections do not reflect local characteristics regarding existing and planned infrastructure capacity or availability, economic and planning assumptions, information from official plans or locally prepared projections. Therefore, the local context is helpful in supplementing the M.O.F. projections.”



and demand factors, which includes a review of historical Statistics Canada population and housing growth trends. Additional details are provided in Chapter 6 of this report. **Watson is consistent with the approach identified in Chapter 2 of the P.M.G.**

Chapter 3: Developing Housing Needs Forecasts

- Housing Step 1 recommends age-specific headship rates are applied to municipal-level population projections to project total housing needs.
- Housing Step 2 recommends that municipalities should adjust total housing needs to reflect local housing market factors that may impact the number and type of units needed.
- Housing Step 3 states that planning authorities shall establish and implement minimum intensification and redevelopment targets within the built-up area.
- As part of this study, a headship rate analysis by age cohort was undertaken to forecast future housing needs for the Town, which was allocated by Planning Policy Area (see sections 5.5 and 7.3, and Appendices B and C). The total housing forecast in this study was identified by housing structure type based on broader and local market factors, such as building permit data, active development applications, demographic trends (i.e., aging of the population), housing affordability, and increasing demand for rental housing (see sections 5.3, 5.4, 6.1, 6.2 and 6.3). **Watson is consistent with the methodology established in Chapter 3 of the P.M.G. for this study.**

Chapter 4: Developing Employment Forecasts

- Employment Step 1, establishes the recommended approach to calculating employment by applying the municipal activity rate to the population projections.
- Employment Step 2, states that municipalities should make adjustments to the total employment forecast established in Employment Step 1 based on local factors and data.
- Employment Step 3 provides direction to categorize the total employment forecast by land-use category: General Employment, Employment Land Employment and Rural Employment.
- Employment Step 4 lays out the recommended approach planning for employment intensification in the built-up area through consideration of recent



building permit data and development applications to assist with understanding market absorption and intensification potential.

- The employment forecast in this study was developed based on the activity rate method by employment sector (primary, industrial, commercial, institutional, work at home and no fixed place of work) as a base, and adjusted based on key macro economic and regional growth assumptions, and local municipal factors through consultation with Town staff (refer to section 5.4, 5.5.4, and Appendices B and C). The employment forecast was further allocated by Community Area and Employment Area employment for the purposes of land needs assessment (refer to Chapters 8 and 9). Based on this, **Watson has applied the appropriate employment forecast methodology in line with Chapter 4 of the P.M.G. for this study.**

Chapter 5: Land Needs Assessment (L.N.A.)

- The P.M.G. allows for one of three methods to be utilized in a L.N.A., including the option of a simplified method, to identify the quantity of land needed for housing and jobs, considering Employment Area land needs separately from other employment land needs. Each method is consistent with policy direction in the P.P.S., 2024 and considers available data and local conditions. Provided below is a summary of the three methods.
- **Method 1** is based on determining the total number of residents and jobs identified to be accommodated on designated lands by the planning horizon and dividing that amount by the municipality-established appropriate gross density target. The result is the quantity of gross land needs by land-uses type (residential, general employment and Employment Areas). This density-based method is particularly useful for municipalities that plan their growth around specific density targets for residents and jobs. It is especially effective in mixed-use environments where it's challenging to separate residential and non-residential land because of multiple uses on a single site.
- **Method 2** requires municipalities to assess multiple net densities by land use, based on standard industry and land use planning practices, which then adjusted to account for gross land needs. Utilizing this approach would provide an outcome that would provide details on lands required in planning for residential, general employment and Employment Areas. Community Areas which include residential and general employment (commercial and institutional uses) are isolated with separate densities, rather than blended as identified in Method 1.



Watson has carried out this method for this study. Details have been provided on the long-term land requirements for residential and commercial/institutional uses in this study. For simplicity, Watson has used an employment density assumption for general employment instead of using Floor Space Per Worker and Floor Space Index as identified in the proposed P.M.G. document.

- **Method 3** is a simplified approach that allows municipalities to use either Method 1 or 2 to develop housing needs with a simplified approach for accounting for employment. General employment (outside of the Employment Area) is factored in based on adding a percentage for jobs to the people and jobs total, while Employment Area is separated based on density (i.e., jobs per hectare). According to the P.M.G. document, smaller and more rural municipalities are advised to use this method, where there are resources and capacity constraints in undertaking the work required for methods 1 or 2 (e.g undertaking detailed employment surveys). This method would largely assume that a robust employment forecast or limited has not been prepared.



Appendix B

Growth Projections Approach/Methodology



Appendix B: Growth Projections Approach/ Methodology

Approach and Methodology

The population, household, and employment forecast methodology adopted for this study utilizes a combined forecasting approach that incorporates both the traditional “top-down” cohort-survival forecast methodology (i.e., population by age-cohort) and a “bottom-up” household formation methodology. This combined approach is adopted to ensure that both regional economic/demographic trends and local housing market conditions are adequately assessed in developing the long-term growth potential for Orangeville.

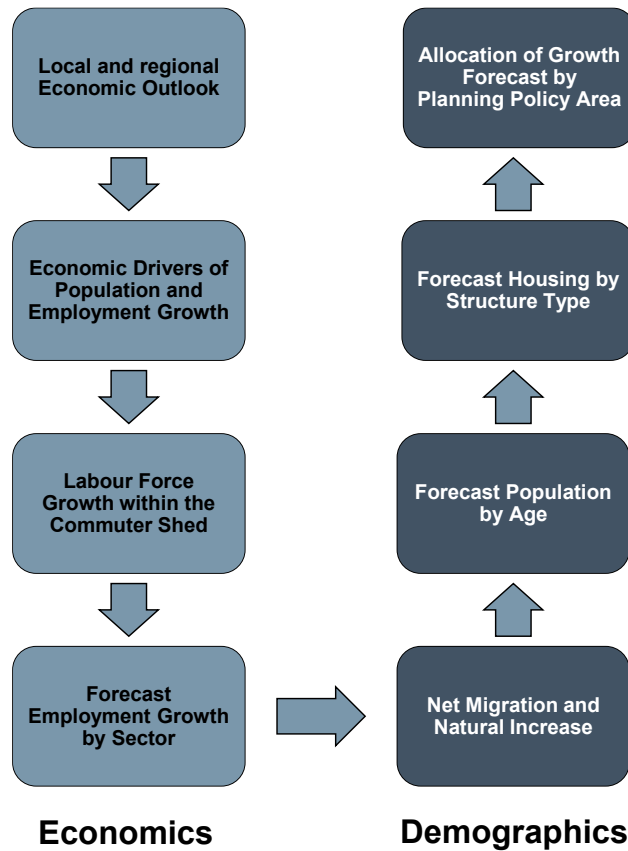
B.1 Economic Base Model

Local/regional economic activities can be divided into two categories: those that are “export-based,” and those that are “community-based.” The export-based sector comprises industries (i.e., economic clusters) that produce goods that reach markets outside the community (e.g. agriculture and primary resources, manufacturing, research and development). Export-based industries also provide services to temporary and second-home residents of Orangeville (hotels, restaurants, tourism-related sectors, colleges, and universities) or to businesses outside the region (specialized financial and professional, scientific and technical services). Community-based industries produce services that primarily meet the needs of the residents in the Town (retail, medical, primary and secondary education, and personal and government services). Ultimately, future permanent population and housing growth within Orangeville has been determined in large measure by the competitiveness of the export-based economy within the Town and the surrounding market area.

On the other hand, population growth in the 65+ cohort will continue to be largely driven by the aging of the Town’s existing population and, to a lesser extent, the attractiveness of the Town to older adults and seniors through net migration. The approach is illustrated schematically in Figure B-1.



Figure B-1
Population and Household Projection Model



B.2 Cohort-Survival Population and Household Forecast Methodology

The cohort-survival population forecast methodology uses as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality, less out-migration, by age group).

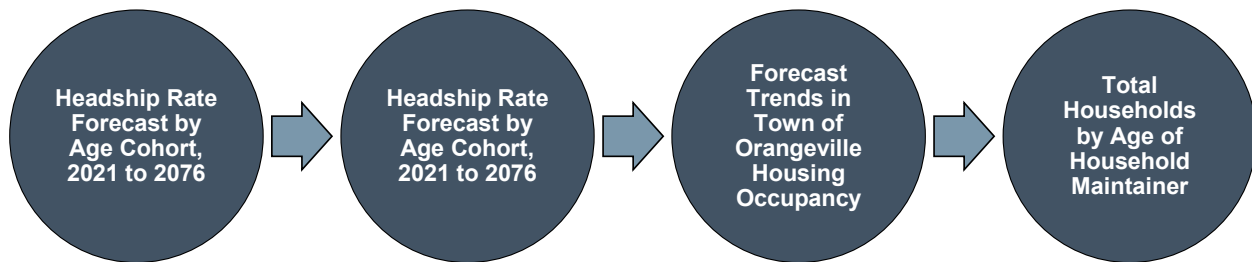
Forecast trends in population age structure provide important insights with respect to future housing needs based on forecast trends in average household occupancy. Total housing growth is generated from the population forecast by major age group using a headship rate forecast.

A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e., cohort). Average headship rates do not



tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e., 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as Orangeville's population ages, the ratio of household maintainers is anticipated to increase. The average headship rate represents the inverse of the average number of persons per unit (P.P.U.). As such, as the Town's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants increases. Figure B-2 summarizes the cohort-survival forecast methodology, which is a provincially accepted approach to projecting population and corresponding total household formation.^[1]

Figure B-2
Cohort-Survival Population and Household Forecast Methodology



This forecasting approach has been developed with consideration to the provincial 1995 Projection Methodology Guideline (P.M.G.)^[2], proposed P.M.G. and industry best practices. This approach focuses on the rate of historical housing construction in Orangeville and the surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, housing units in the development process, and historical housing demand. Population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new housing units and the decline in P.P.U. over time within existing households.

^[1] Projection Methodology Guideline. A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements. 1995.

^[2] Ibid.



B.3 Employment Forecast

The long-term employment growth potential for Orangeville has been developed from the labour force growth forecast, which considers both the rate and age structure of forecast labour-force growth over the 2021 to 2076 planning horizon. A long-term employment growth forecast by major employment sector/category (i.e., primary, industrial, commercial, institutional, work at home) was then established using the employment “activity rate” method.^[1]

When forecasting long-term employment, it is important to understand how employment growth in Orangeville by major employment category (i.e., industrial, commercial, and institutional) is impacted by forecast labour-force and population growth. Population-related employment (i.e., retail, schools, services, and commercial) is generally automatically attracted to locations convenient to residents. Typically, as the population grows, the demand for population-related employment also increases, to service the needs of the local community. Forecast commercial and institutional activity rates have been based on historical activity rates and employment trends, as well as future commercial and institutional employment prospects within a local and regional context. Similar to population-related employment, home-based employment is also anticipated to generally increase in proportion to population growth.^[2]

Industrial and office commercial employment (export-based employment), on the other hand, is not closely linked to population growth and tends to be more influenced by broader market conditions. This includes, but is not limited to, economic competitiveness, transportation access, access to labour, and distance to employment markets) and local site characteristics.^[3] As such, industrial employment (employment

^[1] An employment activity rate is defined as the number of jobs in a municipality divided by the number of residents.

^[2] Due to further advancements in telecommunications technology, it is anticipated that home-based employment activity rates may increase over the forecast period for the Town.

^[3] Local site characteristics include, but are not limited to, servicing capacity, highway access and exposure, site size/configuration, physical conditions, and site location within existing and future industrial lands and Employment Areas throughout Orangeville and the surrounding market area.



land employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

- Macro-economic trends influencing industrial and employment land development (i.e., industrial employment) within Orangeville and the surrounding market area);
- Historical employment trends (i.e., review of established and emerging employment clusters), non-residential construction activity, and recent employment land absorption rates; and
- Availability of serviced industrial and employment land supply (i.e., shovel-ready industrial and employment land) and future planned greenfield development opportunities on vacant designated industrial and employment lands within Orangeville and the surrounding market area.



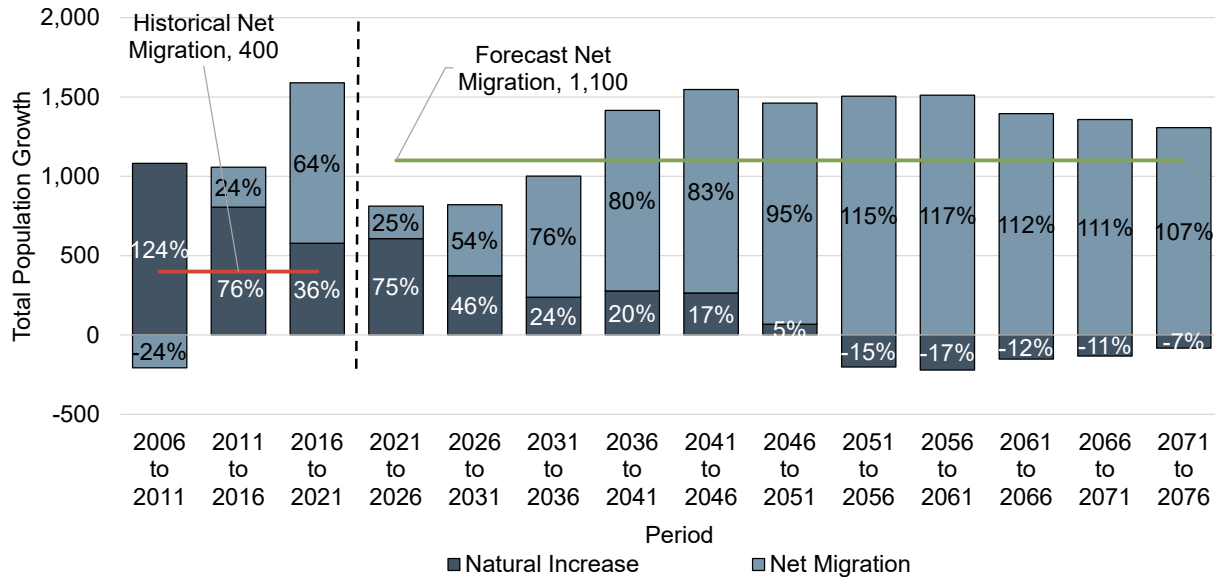
Appendix C

Town of Orangeville Population, Housing and Employment Forecast Details



Appendix C: Town of Orangeville Population, Housing and Employment Forecast Details

Figure C-1
Town of Orangeville
Components of Population Growth, 2021 to 2076



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

Source: Historical data derived from Statistics Canada Table 17-10-0136-01; forecast by Watson & Associates Economists Ltd.



Figure C-2a
Town of Orangeville
Forecast Net Migration by Age Cohort, 2021 to 2076

Cohort	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056	2056-2061	2061-2066	2066-2071-	2071-2076
0-19	85	145	250	380	430	490	505	510	470	460	455
20-34	75	165	275	400	440	495	500	495	450	435	415
35-44	100	190	310	455	505	570	580	570	520	505	485
45-54	-30	10	20	30	45	55	65	75	75	80	85
55-74	-40	-55	-85	-120	-130	-140	-135	-130	-115	-105	-100
75+	10	20	25	25	25	30	30	30	25	25	25
Total	200	475	795	1,170	1,315	1,500	1,545	1,550	1,425	1,400	1,365

Figure C-2b
Town of Orangeville
Forecast Net Migration Shares by Age Cohort, 2021 to 2076

Cohort	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056	2056-2061	2061-2066	2066-2071-	2071-2076
0-19	43%	31%	31%	32%	33%	33%	33%	33%	33%	33%	33%
20-34	38%	35%	35%	34%	33%	33%	32%	32%	32%	31%	30%
35-44	50%	40%	39%	39%	38%	38%	38%	37%	36%	36%	36%
45-54	-15%	2%	3%	3%	3%	4%	4%	5%	5%	6%	6%
55-74	-20%	-12%	-11%	-10%	-10%	-9%	-9%	-8%	-8%	-8%	-7%
75+	5%	4%	3%	2%	2%	2%	2%	2%	2%	2%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Figures have been rounded.

Source: Watson & Associates Economists Ltd.



Figure C-3a
Town of Orangeville
Population Forecast by Major Age Group, 2021 to 2076

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061	2066	2071	2076
0-19	8,300	8,000	7,700	7,700	7,700	7,400	7,200	7,200	7,500	7,700	7,800	7,800	7,800	7,900	8,400
20-34	5,600	5,600	5,900	6,300	5,800	5,700	6,000	6,300	6,300	6,200	6,000	6,200	6,600	6,800	6,700
35-44	5,000	4,400	4,200	4,600	4,900	4,800	4,500	4,600	5,100	5,400	5,700	5,600	5,400	5,300	5,500
45-54	3,900	4,600	4,700	4,200	4,300	4,600	5,000	5,000	4,800	5,000	5,500	5,800	6,100	6,000	5,700
55-64	2,400	2,900	3,300	3,900	4,200	4,000	4,100	4,400	4,800	4,800	4,600	4,800	5,300	5,700	5,900
65-74	1,400	1,700	2,300	2,500	2,900	3,600	3,800	3,700	3,700	4,000	4,400	4,400	4,300	4,500	5,000
75+	1,300	1,500	1,800	2,100	2,500	2,900	3,500	4,300	4,900	5,300	5,800	6,300	6,900	7,300	7,600
Total	27,900	28,800	29,900	31,400	32,300	33,100	34,100	35,500	37,000	38,500	39,800	41,100	42,300	43,600	44,800

Figure C-3b
Town of Orangeville
Population Forecast Shares by Major Age Group, 2021 to 2076

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061	2066	2071	2076
0-19	30%	28%	26%	25%	24%	22%	21%	20%	20%	20%	20%	19%	18%	18%	19%
20-34	20%	19%	20%	20%	18%	17%	18%	18%	17%	16%	15%	15%	16%	16%	15%
35-44	18%	15%	14%	15%	15%	14%	13%	13%	14%	14%	14%	14%	13%	12%	12%
45-54	14%	16%	16%	13%	13%	14%	15%	14%	13%	13%	14%	14%	14%	14%	13%
55-64	9%	10%	11%	13%	13%	12%	12%	12%	13%	12%	12%	12%	13%	13%	13%
65-74	5%	6%	8%	8%	9%	11%	11%	10%	10%	10%	11%	11%	10%	10%	11%
75+	5%	5%	6%	7%	8%	9%	10%	12%	13%	14%	14%	15%	16%	17%	17%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note: Population includes Census undercount of approximately 4.1%. Figures may not add precisely due to rounding.

Source: 2006 to 2021 derived from Statistics Canada Census and Demography Division data; 2021 to 2061 derived by Watson & Associates Economists Ltd.



Figure C-4
Town of Orangeville
Housing Headship Rates, 2021 to 2076

Cohort	2006	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061	2066	2071	2076
15-24	5%	5%	4%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%	3%
25-34	39%	39%	38%	33%	33%	33%	33%	33%	33%	33%	33%	33%	33%	33%	33%
35-44	51%	51%	50%	47%	46%	46%	46%	46%	46%	46%	46%	47%	46%	46%	46%
45-54	54%	56%	57%	56%	56%	56%	56%	56%	56%	56%	56%	56%	56%	56%	56%
55-64	60%	57%	57%	57%	57%	57%	57%	57%	57%	57%	57%	57%	57%	57%	57%
65-74	61%	58%	56%	57%	56%	56%	56%	56%	56%	56%	56%	57%	56%	56%	56%
75+	57%	66%	56%	58%	57%	57%	57%	57%	57%	57%	57%	58%	57%	57%	57%
Total	34%	35%	35%	35%	36%	37%	37%	38%	38%	39%	39%	39%	40%	40%	40%

Source: 2006 to 2021 derived from Statistics Canada Census data; 2021 to 2076 by Watson & Associates Economists Ltd.



Figure C-5a
Town of Orangeville
Population and Household Forecast, 2021 to 2076

Year	Population (Excluding Census undercount)	Population (Including Census undercount) ^[1]	Singles & Semi- Detached Households	Multiple Dwelling Households ^[2]	Apartment Households ^[3]	Total Households	Persons Per Unit (P.P.U.) with undercount
2011	28,800	28,000	7,400	1,090	1,600	10,090	2.85
2016	29,800	28,900	7,640	1,290	1,650	10,570	2.82
2021	31,400	30,200	7,890	1,390	1,800	11,060	2.84
2026	32,300	30,900	7,890	1,480	2,160	11,530	2.80
2031	33,100	31,700	8,000	1,640	2,490	12,130	2.73
2036	34,100	32,700	8,120	1,810	2,850	12,780	2.67
2041	35,500	34,000	8,250	2,000	3,230	13,480	2.63
2046	37,000	35,500	8,440	2,180	3,560	14,180	2.61
2051	38,500	36,900	8,650	2,370	3,860	14,870	2.59
2056	39,800	38,200	8,890	2,550	4,120	15,550	2.56
2061	41,100	39,400	9,130	2,730	4,350	16,200	2.54
2066	42,300	40,600	9,360	2,900	4,570	16,820	2.52
2071	43,600	41,800	9,570	3,070	4,760	17,400	2.50
2076	44,800	42,900	9,760	3,220	4,930	17,910	2.50



Figure C-5b
Town of Orangeville
Incremental Population and Household Forecast, 2021 to 2076

Year	Population (Excluding Census undercount)	Population (Including Census undercount) ^[1]	Singles & Semi- Detached Households	Multiple Dwelling Households ^[2]	Apartment Households ^[3]	Total Households	Persons Per Unit (P.P.U.) with undercount
2011 - 2021	2,600	2,200	490	300	200	990	-
2021 - 2031	1,700	1,500	110	250	690	1,050	-
2021 - 2041	4,100	3,800	360	610	1,430	2,420	-
2021 - 2051	7,100	6,700	760	980	2,060	3,800	-
2021 - 2061	9,700	9,200	1,240	1,340	2,550	5,140	-
2021 - 2071	12,200	11,600	1,680	1,680	2,960	6,320	-
2021 - 2076	13,400	12,700	1,870	1,830	3,130	6,830	-

^[1] Census undercount estimated at approximately 4.3%.

^[2] Includes townhouses and apartments in duplexes.

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

Notes: Figures may not sum precisely due to rounding.

Source: 2011 to 2021 derived from Statistics Canada Census data. 2021 to 2076 by forecast by Watson & Associates Economists Ltd.



Figure C-6a
Town of Orangeville
Employment Forecast, 2025 to 2076

Period	Population Including Undercount	Primary Employment	Work at Home Employment	Industrial Employment	Commercial/ Population Related Employment	Institutional Employment	N.F.P.O.W. ^[1] Employment	Total Employment (Including N.F.P.O.W.)	Activity Rate
2011	28,800	60	710	2,250	5,810	3,090	1,990	13,910	48%
2016	29,800	40	840	2,110	5,790	2,970	2,340	14,080	47%
2025	32,100	40	1,030	2,290	5,880	2,980	2,390	14,610	46%
2026	32,300	40	1,070	2,330	5,880	2,980	2,390	14,700	45%
2031	33,100	40	1,130	2,380	6,070	3,070	2,520	15,200	46%
2036	34,100	40	1,190	2,420	6,270	3,170	2,660	15,750	47%
2041	35,500	40	1,260	2,500	6,530	3,300	2,760	16,390	47%
2046	37,000	40	1,350	2,690	6,830	3,440	2,940	17,290	47%
2051	38,500	40	1,440	2,870	7,110	3,590	3,050	18,100	48%
2056	39,800	40	1,530	3,050	7,360	3,710	3,210	18,900	48%
2061	41,100	40	1,670	3,270	7,610	3,840	3,290	19,720	48%
2066	42,300	40	1,720	3,440	7,850	3,950	3,450	20,440	48%
2071	43,600	40	1,820	3,570	8,080	4,070	3,530	21,100	48%
2076	44,800	40	1,910	3,680	8,320	4,190	3,660	21,790	49%



Figure C-6b
Town of Orangeville
Incremental Employment Forecast, 2025 to 2076

Period	Population Including Undercount	Primary Employment	Work at Home Employment	Industrial Employment	Commercial/ Population Related Employment	Institutional Employment	N.F.P.O.W. ^[1] Employment	Total Employment (Including N.F.P.O.W.)	Activity Rate
2011 - 2016	1,000	-20	130	-140	-20	-120	350	170	-
2016 - 2025	2,300	0	190	180	90	10	50	530	-
2025 - 2031	1,000	0	100	90	190	90	130	590	-
2025 - 2041	3,400	0	230	210	650	320	370	1,780	-
2025 - 2051	6,400	0	410	580	1,230	610	660	3,490	-
2025 - 2061	9,000	0	640	980	1,730	860	900	5,110	-
2025 - 2071	11,500	0	790	1,280	2,200	1,090	1,140	6,490	-
2025 - 2076	12,700	0	880	1,390	2,440	1,210	1,270	7,180	-

^[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as “persons who do not go from home to the same work place location at the beginning of each shift.” Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

Note: Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021 to June 14, 2021. eSource: 2011 to 2016 data from Statistics Canada Census. 2024 to 2061 forecast by Watson & Associates Economists Ltd.