REPORT

PREPARED BY HEMSON FOR UNITED COUNTIES OF LEEDS AND GRENVILLE

GROWTH MANAGEMENT STRATEGY

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EXECUTIVE SUMMARY

This Growth Management Strategy (GMS) report presents long-term growth forecasts and the results of a residential and employment area land needs assessment undertaken for the United Counties of Leeds and Grenville (UCLG or the Counties). It also provides detailed analysis of growth management policies that will serve as the basis for updates to the Counties Official Plan.

The forecasts and land needs assessment extends to June 30, 2051. The forecast is based on a High Growth Scenario, which is higher than that set out in the most recent Ministry of Finance Population Projections for the Counties. On December 10, 2025, Counties Council adopted the use of the High Growth Scenario in principle for the GMS.

A. SUMMARY OF RESIDENTIAL FORECASTS TO 2051

Under the High Growth Scenario:

- The Counties population is forecast to increase from approximately 78,940 in 2026 to 98,770 by 2051, adding about 19,830 people over the period. Annual population growth is expected to be steady, averaging 800 people per year.
- Migration will be the primary driver of population growth in UCLG. Intra-provincial migration will account for the largest share of new residents. The number and share of seniors aged 65+ in the Counties are expected to rise steadily over the forecast period. Overall, the number of deaths will exceed the number of births within the Counties over the entire period (natural decrease).
- Households in the Counties are projected to grow steadily from 2021 to 2051, increasing from approximately 29,530 to about 42,270. This represents sustained long-term growth across the Counties, reflecting ongoing population increases, household formation, and housing demand. This represents 1.2% compound annual growth under the High Growth Scenario.
- Housing choices will continue to evolve as the population ages and household sizes becomes smaller in UCLG. Compared to current day, the housing mix in 2051 will be more balanced, with a stronger role for higher density housing forms across a wider range of age cohorts.

- Growth is not forecast to be evenly distributed across municipalities within the Counties. **North Grenville** remains the largest centre throughout the forecast period and continues to see rapid increases in population and households, reinforcing its role as the Counties' primary urban settlement area. North Grenville is forecasted to receive nearly 60% of all household growth in the Counties.

- Communities such as **Augusta**, **Edwardsburgh-Cardinal**, **Leeds and the Thousand Islands**, and **Elizabethtown-Kitley** are all projected to experience higher-than-historical population growth. These municipalities are expected to play a larger role in accommodating future residents due to their ability to absorb growth within settlement areas (rural and urban), the availability of developable land and, in some cases, planned expansions to municipal servicing infrastructure, such as those contemplated in the Riverview Heights Secondary Plan area in Augusta and the special serviced residential campus area on the former Rows Corner Fairground in Elizabethtown-Kitley.

- Smaller and more rural municipalities such as **Athens**, **Rideau Lakes**, **Front of Yonge**, and **Merrickville-Wolford** are projected to continue growing at a slower pace than the Counties-wide average, although still at rates above historical trends. **Westport** has also experienced high population growth in recent years, which has influenced the forecasts results. However, the community's physical and land supply constraints are expected to moderate growth over the longer term.

- It is recommended that the Counties, in partnership with **Westport** and **Rideau Lakes**, undertake a servicing and growth management study prior to the next Counties Official Plan Update to examine long-term opportunities for accommodating growth in and around **Westport**. The study should evaluate opportunities for intensification, potential settlement area boundary expansions, and, where appropriate, the feasibility of inter-municipal servicing agreements and/or communal servicing solutions.

- It is further recommended that the Counties undertake a long-term growth management study for **Merrickville-Wolford** as part of the next review of the Counties Official Plan. Given the importance of servicing considerations to future growth opportunities in the community, this study should be initiated only after the completion of a comprehensive master servicing plan. The study should examine the community's long-term growth potential, servicing capacity, opportunities for intensification and settlement area expansion, and any associated policy changes required to support sustainable growth.

B. SUMMARY OF NON-RESIDENTIAL FORECASTS TO 2051

- The Counties' employment will grow by 6,970, from 23,500 in 2026 to 30,470 in 2051. **North Grenville** is forecast to remain the largest employment centre in the Counties over the forecast period. Employment in North Grenville is forecasted to increase from about 7,860 jobs in 2026 to nearly 10,730 jobs by 2051, about 41% of total Counties employment growth, reinforcing its role as the primary economic hub within the Counties.

- **Augusta** will experience strong employment growth, increasing from approximately 1,350 jobs in 2026 to nearly 3,000 jobs by 2051, or 19% of total Counties employment growth. This growth reflects an expanding service and residential-related employment base.

- **Edwardsburgh-Cardinal** and **Elizabethtown-Kitley** are also projected to see substantial increases in employment, about 23% of Counties employment growth in both municipalities. Employment here will be mixed, with significant growth in employment areas in addition to population-related employment.

- The remaining municipalities, **Athens**, **Front of Yonge**, **Merrickville-Wolford**, **Leeds and the Thousand Islands**, **Rideau Lakes**, and **Westport** will see slower, but positive employment growth. These municipalities collectively contribute about 16% of overall Counties employment growth to 2051.

- Employment on designated employment areas—lands planned primarily for manufacturing and activities ancillary to manufacturing under the PPS 2024—are projected to experience significant growth. **Augusta**, **Edwardsburgh-Cardinal**, and **Elizabethtown-Kitley** show the largest increases in this type of employment, indicating continued demand for well-located lands along major good corridors that support manufacturing, logistics, and other industrial uses.

C. SUMMARY OF LAND NEEDS ASSESSMENT RESULTS

- When compared to forecast housing needs, all local municipalities except North Grenville have sufficient urban greenfield lands to accommodate residential growth to 2051. **North Grenville** has an overall urban greenfield land deficit of approximately 182.3 gross hectares of residential lands. Based on the forecast absorption of available lands, the existing urban residential land supply in the Municipality is expected to be exhausted by the mid-2030s.

- Collectively, the Counties have a sufficient supply of land to accommodate the forecast growth over the planning horizon.
- All local municipalities have sufficient designated employment areas to accommodate anticipated job growth in those areas to 2051.

D. POLICY RESEARCH AND RECOMMENDATIONS

In addition to the forecast results, Section 5 of this GMS report provides policy recommendations for managing residential (both urban and rural) and employment growth in the Counties. The recommendations are based on the growth forecasts and land needs assessment, a review of the Provincial Planning Statement 2024, a comparative review of growth management policies in UCLG local official plans and the official plans of other Ontario upper-tier municipalities (see Appendices C and D), and an assessment of local servicing, settlement structure, housing, and employment land conditions in the Counties.

The policy recommendations will be further developed through the County Official Plan Update, scheduled to start in late 2026 or early 2027. The final policies should create opportunities to focus growth and create complete communities in settlement areas and protect employment areas. Further, policies should maintain rural character and balance between County interests and local considerations.

1. Introduction

Hemson Consulting has been retained to prepare a Growth Management Strategy (GMS) for the United Counties of Leeds and Grenville (UCLG or the Counties). The strategy includes:

- long range forecasts of population, households, housing by type, and employment by type to 2051 for the Counties and its 10 local municipalities—Athens, Augusta, Edwardsburgh-Cardinal, Elizabethtown-Kitley, Front of Yonge, Leeds and the Thousand Islands, Merrickville-Wolford, North Grenville, Rideau Lakes and Westport;
- an assessment of the residential and non-residential land needs associated with the forecasted growth; and
- policy recommendations for managing growth in both rural and urban areas of the Counties.

The previous GMS was completed in 2014 as part of the background work for the Counties first Official Plan. The GMS is intended to serve as the basis for a subsequent amendment to that Official Plan or background in the Official Plan Update. Since 2014, several important changes as to how municipalities plan for growth have occurred, mainly:

- the Provincial Government has released the Provincial Planning Statement 2024, which establishes a new framework for municipal forecasting and growth management and replaces the previous Provincial Planning Statements 2020 and 2014; and
- the Counties has experienced stronger-than-anticipated growth in recent years, particularly in the Municipality of North Grenville and other communities which are within commuting distance of the City of Ottawa.

This report provides an overview of the socio-economic and demographic trends underlying this recent growth and examines how these trends might influence future growth in the Counties to 2051.

Detailed forecast results, as well as research supporting the policy recommendations, are provided in appendices.

A. PROVINCIAL PLANNING STATEMENT REQUIREMENTS

The Provincial Planning Statement 2024 (PPS 2024) is the province's primary land use planning policy issued under the *Planning Act*. All municipal planning decisions—including those related to the Counties Official Plan update—must be consistent with the PPS 2024.

i. Growth Forecasts and the PPS

The forecasts presented in this report are based on the most recent Ministry of Finance Population Projections and are prepared in accordance with PPS Policy 2.1.1, which states:

> As informed by provincial guidance, planning authorities shall base population and employment growth forecasts on Ontario Population Projections published by the Ministry of Finance and may modify, as appropriate.

In addition, PPS Policy 2.1.3 requires that, at the time of creating a new official plan or updating an existing official plan, sufficient land be made available to accommodate an appropriate range and mix of lands uses to meet projected needs over a planning horizon of at least 20 years and not more than 30 years. As the forecasts in this report are based on a 25-year time horizon, they satisfy this policy requirement.

Further, the PPS 2024 permits municipalities to plan for infrastructure, public service facilities, strategic growth areas, and employment areas beyond the 30-year maximum time horizon.

ii. Draft Provincial Projection Methodology Guidelines

While the provincial guidance referenced in PPS Policy 2.1.1 above has not yet been finalized, the Ministry of Municipal Affairs and Housing has released draft guidance to assist planning authorities with developing growth forecasts and assessing land needs for long-range planning.[1] The guidance is intended to help municipalities apply a common methodological approach when preparing studies, assessments, and technical analyses that inform planning and housing decisions, including circumstances where modifications to the Ministry of Finance Population Projections may be warranted.

The forecasts presented in this report are consistent with this draft guidance.

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[1] Proposed Updates to the Projection Methodology Guideline to Support Implementation of the Provincial Planning Statement, 2024, released on August 12, 2025 on the Environmental Registry of Ontario (ERO 025-0844).

iii. Planning for Employment

The PPS 2024 includes specific policies for planning for employment areas, including:

- requiring planning authorities to promote economic development and competitiveness by ensuring an appropriate mix and supply of employment lands, supporting a diversified economic base, identifying strategic investment sites, encouraging intensification and compact mixed-use development, and maintaining land use compatibility between employment areas and sensitive uses (Policy 2.8.1.1 a–e);

- permitting industrial and manufacturing uses that can operate without adverse effects to also be located in mixed-use or transit-served areas outside designated employment areas (Policy 2.8.1.2), while development within 300 metres of employment areas must avoid or mitigate impacts on their long-term viability (Policy 2.8.1.3);

- requiring that major office and institutional uses be directed to major transit station areas or other strategic growth areas (Policy 2.8.1.4);

- requiring municipalities to plan for, protect, and preserve employment areas by ensuring adequate infrastructure (Policy 2.8.2.1), safeguarding lands near major goods movement corridors (Policy 2.8.2.2), and designating employment areas primarily for industrial, manufacturing, warehousing, and related uses while generally prohibiting residential, unrelated retail/office, and other sensitive land uses (Policy 2.8.2.3 a–e); and

- requiring that municipalities periodically review employment area designations and maintain compatibility with surrounding uses to protect their long-term economic function (Policy 2.8.2.4).

iv. Upper-Tier Planning Responsibilities

Where planning responsibilities are undertaken by an upper-tier municipality such as the Counties, the upper-tier must, in consultation with lower-tier municipalities, coordinate and manage growth across the region. This includes allocating population, housing, and employment forecasts to lower-tier municipalities (Policy 6.2.9 a), identifying where growth will be focused—such as strategic growth areas—and establishing any applicable minimum density targets (Policy 6.2.9 b), setting minimum density requirements for development in new or expanded settlement areas (Policy 6.2.9 c), and providing policy direction on planning matters that cross municipal boundaries (Policy 6.2.9 d).

v. Consultation

As noted above, the PPS 2024 requires that the Counties work with lower-tier municipalities to coordinate and manage growth through their Official Plans. A coordinated, integrated, and comprehensive approach to regional planning is also emphasized by the Draft Projection Methodology Guidelines.

Given these directives, the approach to the GMS has been highly consultative, involving online engagement (including an online survey), direct engagement with local municipal planners and staff, and direct engagement with the development industry and the general public.[2] Further details of consultation are included in Appendix A.

B. MINISTRY OF FINANCE POPULATION PROJECTIONS

The Counties population forecasts are based on Ministry of Finance Population Projections (MOF Projections) from July 1, 2024 to June 30, 2025 that were released on August 1, 2025.[3] These projections provide annual population estimates using Statistics Canada Census data and other relevant demographic sources. They are prepared using a cohort-survival model, which is widely regarded as the best practice for projecting population by age and sex.

The cohort-survival approach separates population change into its fundamental components: births are added, deaths are subtracted, and net migration—reflecting movements into and out of the population from international, interprovincial, and intra-provincial sources—is incorporated. This methodology, accepted as the standard practice in growth forecasting and used to develop this GMS, was also applied consistently in previous Counties population forecasts prepared by Hemson in 2014.

The Ministry notes that the projections do not incorporate explicit economic assumptions or public policy interventions. Rather, they reflect a continuation of recent migration trends

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[2] For more see https://www.leedsgrenville.com/en/government/growth-management-strategy.aspx

[3] https://data.ontario.ca/dataset/population-projections

over the remainder of the projection period, along with the continuing evolution of long-term fertility and mortality patterns. As such, they are not intended to be "forecasts" that explicitly account for long-term structural changes in the economy, a precise outlook for Federal immigration policies, and Provincial and local housing demand, land use plans, infrastructure investment, or the availability of land for development.

> **Projections, forecasts and targets:** In this guidance, a 'projection' extrapolates present trends (e.g., fertility, mortality, and migration) to a future state (e.g., population) based on the assumption that the trends would continue into the future. A projection is neutral and does not consider how changes in assumptions or potential uncertainty in the continuation of past trends would impact the future. A 'forecast' is a best estimate to predict a future state (e.g., population, employment) that is based on projections and builds on present trends but considers the potential impacts that changing variables and assumptions may have. A 'target' represents a specific end goal, expressed as a policy objective (e.g., a target of 150 people and jobs per hectare in a major transit station area). Targets are specific policy objectives determined by planning authorities to be responsive to their forecasts.

Source: Proposed Projection Methodology Guideline, March 30, 2026, p.8.

This distinction is particularly important in the context of Leeds and Grenville. Planned investments in key housing-enabling municipal infrastructure—such as the expansion of the Kemptville Sewage Treatment Plant—together with County and local municipal policy initiatives intended to encourage growth across the region, could result in population and housing growth that exceeds levels implied by a projection based solely on recent demographic trends. Given this, a growth scenario based on higher growth than anticipated by the MOF Projections (the high growth scenario) has been prepared as part of the GMS.

For Ontario as a whole, the MOF prepares three long-term population projection scenarios: low, reference, and high. The reference (medium) scenario is then allocated to each of Ontario's 49 census divisions. Census divisions generally correspond to single-tier municipalities and upper-tier regions, counties, and districts. In the context of the Counties' GMS, the census division includes the Counties jurisdictional boundaries as well as the single tier City of Brockville and the Towns of Gananoque and Prescott. This GMS adopts the MOF census division projections as the starting point and then allocates the forecasted growth between the single-tier municipalities and the Counties.

Finally, the MOF Population Projections are limited to population and do not include forecasts of households, housing, or employment.

i. Summary of MOF Population Projections for Ontario

Under the MOF Projections reference scenario, Ontario's population is projected to grow from approximately 16.1 million in 2024 to more than 20.5 million by 2051. This represents growth of more than 4.4 million people, or about 27% over the projection period. Population growth is expected to be relatively modest through the mid-2020s before stabilizing at around 1% annually by the late 2020s and continuing at that pace through most of the period.

The projections also indicate continued aging of Ontario’s population.

- The number of seniors is expected to increase steadily, resulting in a growing share of the population aged 65 and over.
- While the population aged 0 to 14 is projected to increase slightly in absolute terms it is expected to decline as a share of the total population over much of the projection period.
- The working-age population aged 15 to 64 is projected to continue growing in absolute terms, supporting labour force expansion, although its share of the total population is expected to decline modestly before stabilizing over the longer term.

These provincial trends are apparent in the MOF Population Projections for the Counties.

Note: Throughout this report, any reference to “Counties” refers to the local area municipalities only rather than the UCLG CD, which refers to the Counties plus the City of Brockville, Town of Gananoque and Prescott.

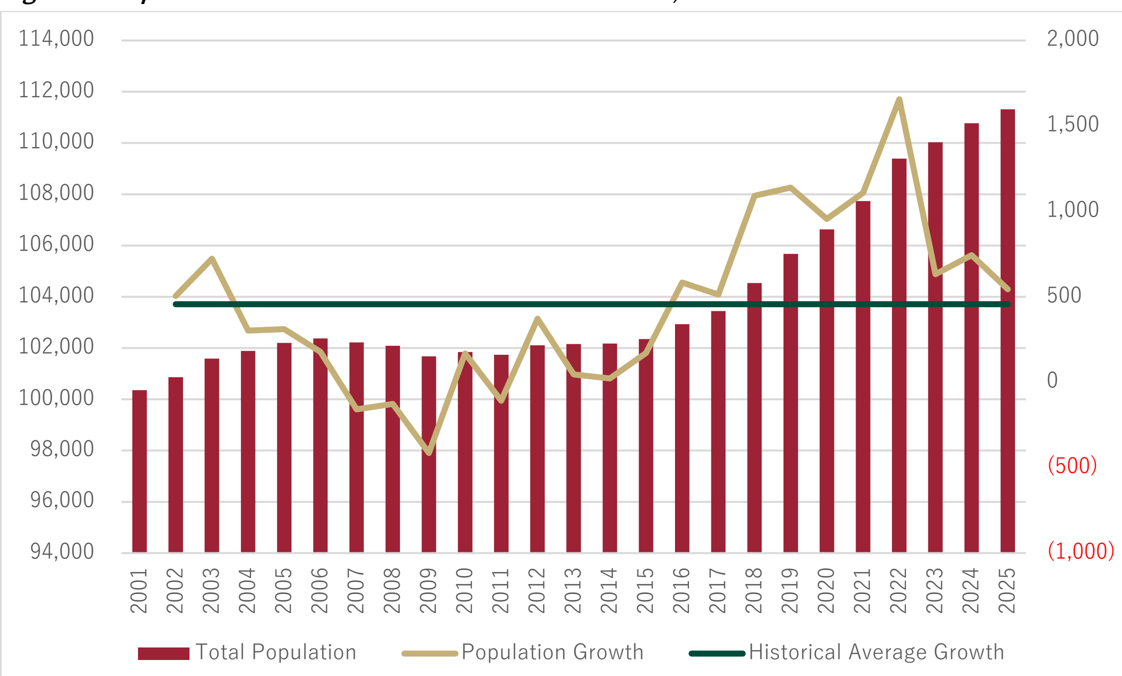
2. ECONOMIC & DEMOGRAPHIC CONDITIONS IN THE UCLG CENSUS DIVISION

This section summarizes the socio-economic and demographic trends driving recent population, housing, and employment growth in the Counties.

A. RECENT CENSUS DIVISION POPULATION GROWTH

Between 2001 and 2025, the population of the UCLG census division (which includes the City of Brockville, Town of Gananoque, and Town of Prescott) increased from 100,358 to 111,314, representing growth of nearly 11,000 permanent residents. Over the entire period, the census division grew by an average of approximately 460 residents per year (see Figure 1).

Figure 1: Population Growth in the UCLG Census Division, 2001-2025



Source: Statistics Canada, Census of Canada 2001-2021 and Annual Demographic Estimates.

Population growth began to accelerate in 2016. Each subsequent year recorded increases that exceeded historical averages, with particularly strong growth between 2017 and 2022. The most pronounced increase occurred in 2022, when the population grew by just over 1,650 residents. Although the rate of growth has moderated somewhat in the most recent years, it remains elevated relative to long-term trends.

Most of the Counties recent population growth has been driven by intra-provincial migration, primarily from the City of Ottawa. Intra-provincial migration accounted for the majority of total population growth since 2006, over 85% of all growth.

The acceleration in intra-provincial in-migration reflects several interrelated factors:

- **Population age structure**: the peak age of the Millennial generation just turned 35, the age at which many are forming households, having children, and purchasing their first home. This has led to a rise in the number of homebuyers.

- **Housing affordability pressures**, which have pushed younger and first-time homebuyers to seek more affordable housing options outside metropolitan areas, through still within a reasonable commuting distance to their place of work. This dynamic has been particularly evident in North Grenville, which is located approximately 60 km south of Ottawa via Highway 416.

- **Remote and flexible work patterns**: The pandemic accelerated the ability and willingness of some households to relocate from higher-density urban areas. In the Counties, this would likely include conversions of seasonal and recreational properties to permanent residences that typically would occur in lakeshore communities such as Rideau Lakes and Leeds and the Thousand Islands.

- **Retirement-related migration**: The early retirement of Baby Boomers—born between 1946 and 1966 whose peak age is therefore now approaching 70—has contributed to increased migration to the Counties, especially to communities offering an active lifestyle in a rural or small-town setting while remaining within driving distance of services, amenities, and the City of Ottawa.

Recent growth has also been influenced, indirectly, by policy-driven increases in permanent and non-permanent resident (NPR) populations at the provincial and national levels. While permanent international immigration and non-permanent residents have accounted for a relatively small share of the Counties direct population growth, broader immigration trends in Ontario have contributed to increased housing demand across eastern Ontario and, in turn, intensified intra-provincial migration to the Counties. In particular:

- Previous growth management work in the Counties anticipated limited growth in Ontario's non-permanent resident population; however, the province experienced record-high increases in NPRs after 2020; and

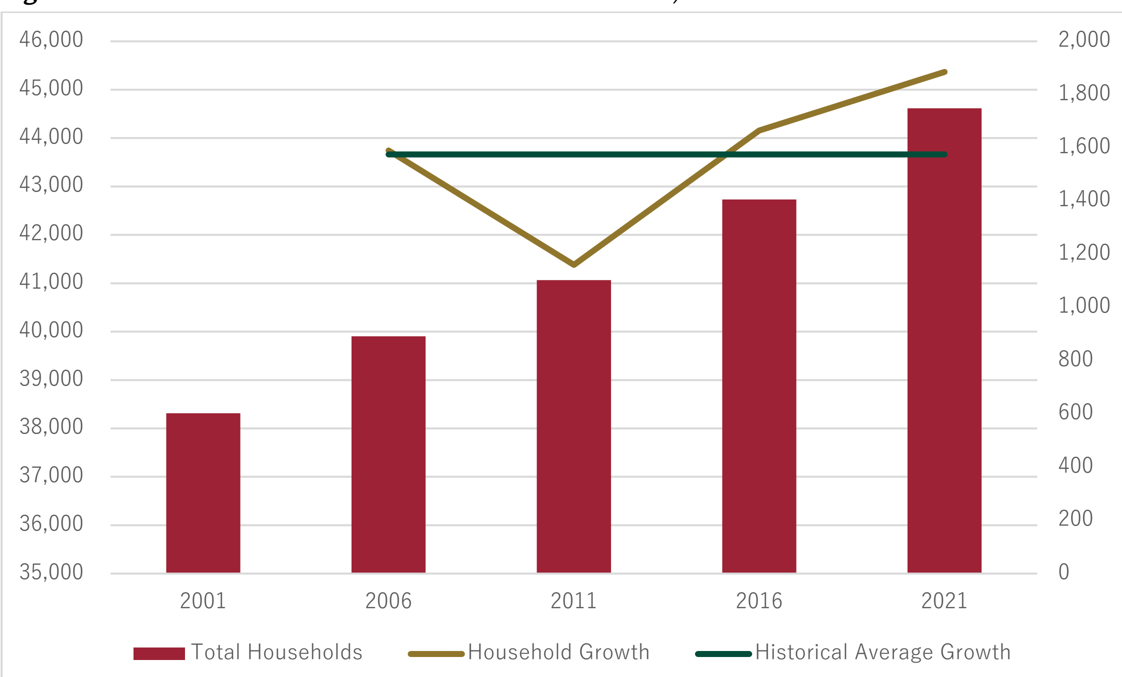
- while increases in permanent immigration were anticipated, the scale of recent federal immigration targets—465,000 in 2023, 485,000 in 2024, and 500,000 in 2025 and 2026—exceeded levels previously assumed in the 2014 GMS.

More recently, federal policy changes have introduced new constraints on population growth, including caps on international student enrolment, tighter eligibility for temporary foreign workers, and reduced national permanent resident targets of 395,000 in 2025, 380,000 in 2026, and 365,000 in 2027. These revised expectations for population growth are reflected in the MOF Population Projections that form the basis of the forecasts presented in this report.

B. RECENT UCLG-WIDE HOUSEHOLD AND HOUSING GROWTH

The number of households with permanent residents in the UCLG census division has increased steadily over the last 25 years, from approximately 38,300 in 2001 to about 44,600 in 2021, with the fastest period of growth being since 2016 (see Figure 2).

Figure 2: Household Growth in the UCLG Census Division, 2001 - 2021



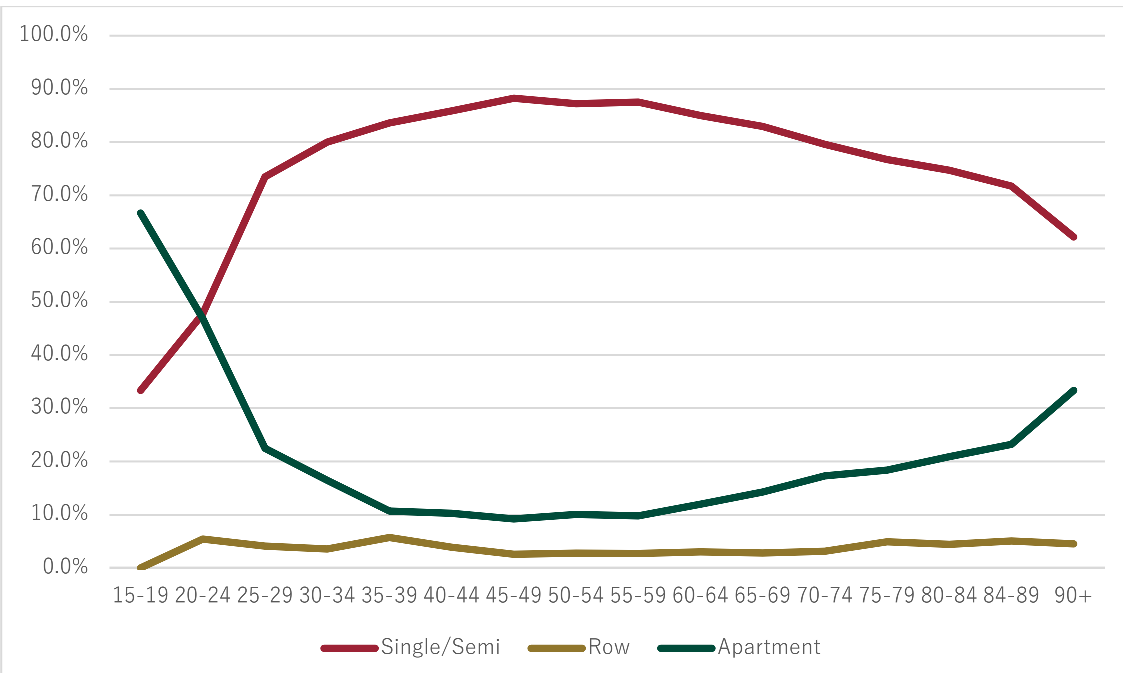
Source: Statistics Canada, Census of Canada 2001-2021

Not all households have the same housing preferences or needs in the UCLG census division. Different age groups and household types tend to occupy different forms of housing, such as apartments, townhouses, single-detached homes or, increasingly, accessory dwelling units (ARUs) influenced by factors like income, lifestyle, accessibility, and proximity to services.

Figure 3 illustrates how housing choice in the census division in 2021 varies significantly by age, reflecting changing household needs and life stages over time.

- **Younger Adults (ages 15-24)**: Household formation rates are relatively low among young adults and only start to increase rapidly from the late 20s. Among the youngest age groups, 15 to 24, apartment living accounts for the largest share of the limited number of households. This pattern reflects a preference for smaller, more affordable and flexible housing options, as well as proximity to education, employment, and services. Ground-oriented housing plays a comparatively minor role at these ages, as many individuals are either delaying independent household formation or opting for higher-density housing types.

Figure 3: 2021 Housing Type Preferences by Age in UCLG Census Division



Source: Statistics Canada 2021 Census Special Run

- **Working Age Population (Ages 25–64)** - Household formation increases rapidly among adults aged 25 to 39, coinciding with family formation and entry into the housing market. As residents in UCLG census division move through their 30s and 40s, there is a pronounced shift toward single and semi-detached dwellings, reflecting demand for larger units and ground-oriented housing. Single and semi-detached homes remain the predominant housing choice through the core working-age years into the mid-60s, while the share of apartment living declines sharply. Row housing plays a limited but important transitional role, providing a more attainable form of ground-oriented housing for some households.

- **Seniors (Ages 65 and Over)** - Beyond age 65, housing preferences begin to shift again. The share of single and semi-detached dwellings gradually declines, while apartment living increases steadily and becomes a more prominent housing choice. This reflects household downsizing, reduced household sizes, accessibility considerations, and a preference for lower-maintenance living closer to services and amenities. As the UCLG's census division population continues to age over the forecast period, the City of Brockville and the Municipality of North Grenville are expected to play an increasingly important role in accommodating the housing needs of older adults.

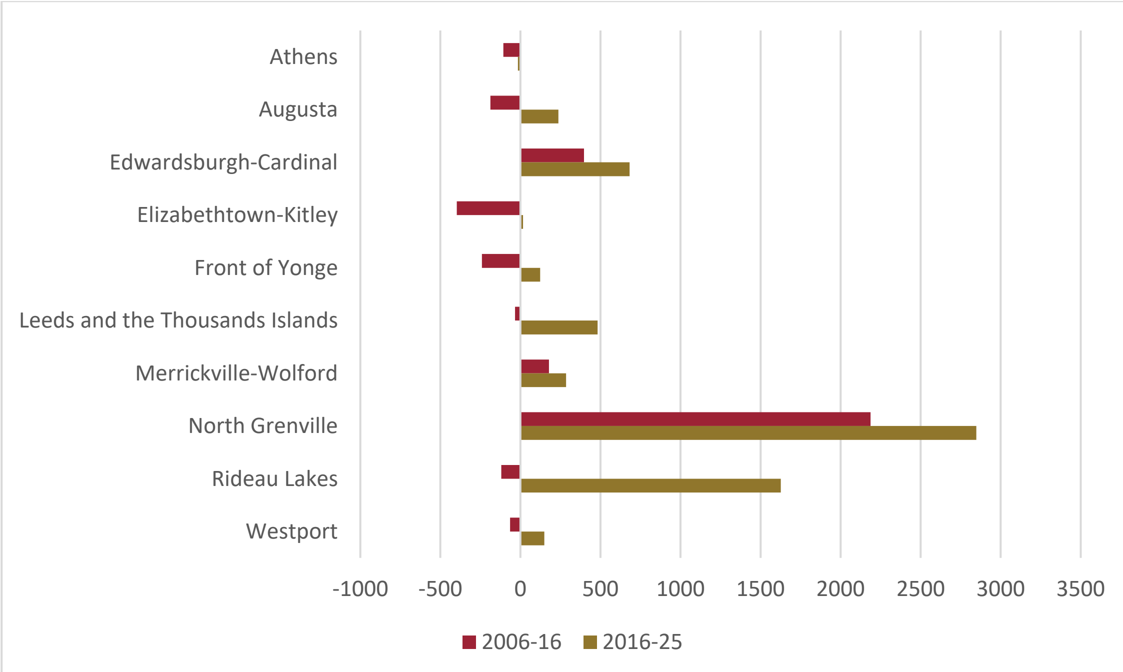
C. RECENT POPULATION GROWTH AT THE LOCAL MUNICIPAL LEVEL

An analysis of historical population growth across the Counties from 2006 to 2025 reveals a notable acceleration in a few municipalities beginning after 2016 and continuing into to 2025. While most local municipalities experienced growth over the 20-year period, the scale and timing varied significantly (see Figure 4).

- Between 2006 and 2016, most municipalities experienced population decline. Where growth did occur, it was concentrated in North Grenville, and to a lesser extent in Edwardsburgh-Cardinal and Merrickville-Wolford.

- Growth accelerated across the Counties from 2016, with all municipalities except Athens seeing positive population increases. North Grenville continued to absorb the majority of population growth with Rideau Lakes seeing an unprecedented level of growth, partially during the period of the pandemic. Of the approximately 6,400 new permanent residents since 2016, 70% located in these two municipalities. Of the remaining 30%, Edwardsburgh-Cardinal and Leeds and the Thousand Islands led the way with 11% and 7% of the growth share respectively.

Figure 4: Population Growth in Local Municipalities, 2001-2025



Source: Statistics Canada, Census of Canada 2001-2021 and Annual Demographic Estimates

D. RECENT HOUSING GROWTH AT THE LOCAL MUNICIPAL LEVEL

Figure 5 illustrates the number of building permits issued for new residential dwelling units in each local municipality since 2021. The distribution of permits highlights both the acceleration in housing activity since 2021 and the continued concentration of growth in North Grenville. Of note is that:

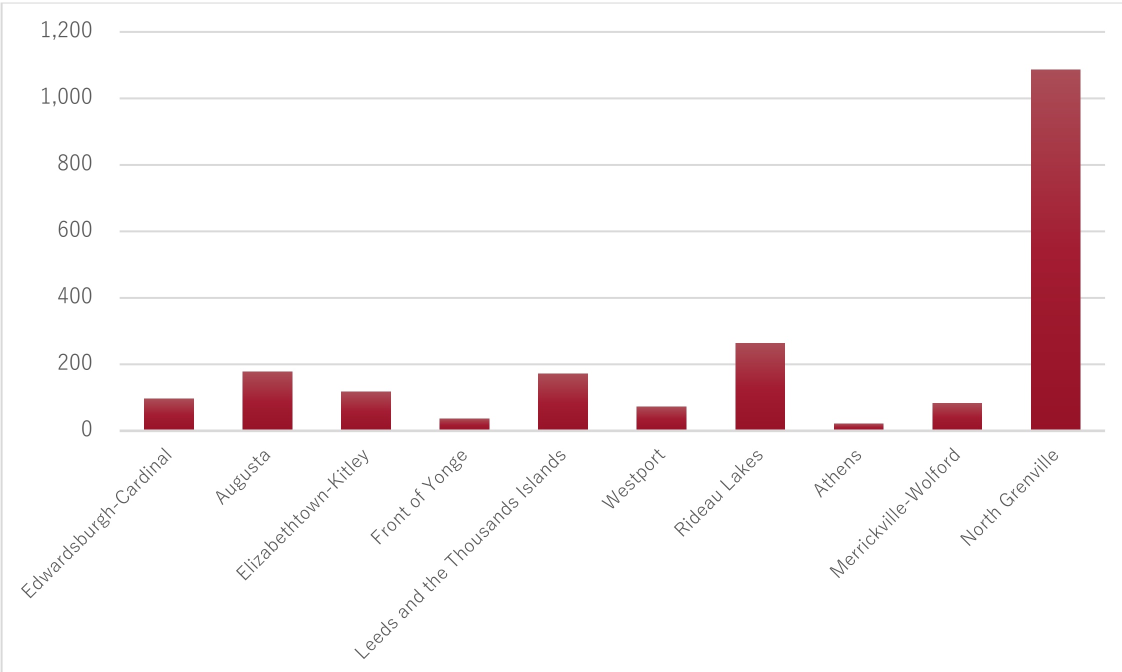
- the composition of new housing is beginning to shift towards higher-density built forms. Since 2021, more than 35% of all permits issued have been for row houses and apartments. This contrasts sharply with the 2006–2021 period, during which only 17% of permits were issued for these unit types;

- the shift in built form has been primarily in North Grenville, which has permitted 331 row units (89% of the Counties' total) and 269 apartments (71% of the Counties' total) since 2021; and

- outside North Grenville, most residential permits have continued to be issued for single and semi-detached units.

Consistent with the direction of the PPS 2024, and in order to meet the needs of a growing and aging population while supporting households across a broad range of income levels, the Counties Official Plan should encourage a greater range and mix of housing forms moving forward.

Figure 5: Residential Building Permit Issuance, 2016-2025



Source: Statistics Canada Building Permits

E. RECENT COUNTIES-WIDE EMPLOYMENT GROWTH

The Counties employment forecasts adopt the Census definition of employment by place of work. As such, employment figures include all place of work status types—including those with no fixed place of work and those who work at home—and encompass all industry sectors, such as retail, industrial, and service employment, regardless of location.

Place-of-work employment in the UCLG census division has experienced periods of both growth and decline over the past several decades, followed by a return to sustained growth.

- Total employment increased from approximately 39,000 jobs in 2001 to about 40,300 jobs in 2006, reflecting strong growth during that period.

- Between 2006 and 2016, employment growth was more uneven. The Counties experienced modest employment declines between 2006 and 2011, and more pronounced declines between 2011 and 2016, reflecting broader economic conditions during those periods. By 2016, total employment stood at approximately 38,001 jobs, a marginal decrease from both the 2006 and 2001 levels.

- From 2016 to 2021, employment in the Counties rebounded, increasing by nearly 1,200 jobs to approximately 39,200 jobs in 2021. While total employment over the longer 2001–2021 period remained largely unchanged, the gains recorded in the most recent five-year period fully offset earlier job losses and resulted in a modest net increase of approximately 200 jobs.

i. Sectoral Breakdown of Employment in Leeds and Grenville

Figure 6 illustrates the distribution of place-of-work employment across major industry sectors of the UCLG census division in 2021. The data indicates that the employment base is characterized by a strong emphasis on construction and manufacturing, as well as population-serving sectors in retail trade, heath care and social assistance, and public administration:

- **Health care and social assistance** is the largest employment sector, accounting for approximately 5,800 jobs. Most of these jobs, approximately 2,675 or nearly 50% are located in Brockville. Brockville also accommodates a concentration of institutional facilities, specialized services, and community supports that extend beyond its municipal boundaries and contribute to regional service delivery.

- **Retail trade** is the second-largest sector, with roughly 5,200 jobs, and is closely tied to resident population growth, household spending, and tourism activity. These jobs are prevalent in all municipalities in the census division, with the main concentrations in Brockville (1,840 or 35%) and North Grenville (1,180 or 23%).

- **Construction** represents the third largest employment sector, employing approximately 4,215 workers. Construction employment, which is dispersed throughout the census division, reflects residential development, infrastructure investment, and renovation activity, particularly since 2020. Continued short to medium-term demand for construction-related employment as population growth and housing development persist is expected.

- **Manufacturing** remains a significant component of the Counties economic base, with approximately 3,600 jobs, mostly in small and medium-sized manufacturing operations (Edwardsburgh-Cardinal, with 700 manufacturing jobs, has a large concentration within the Counties). Along with transportation and warehousing, manufacturing supports a stable base of employment that is in part dependent on designated employment lands.

While these sectors are important to the UCLG's economic resilience, they are collectively smaller than population-serving sectors, underscoring the need by the Counties and local municipalities to invest in economic development to promote the development of employment lands over the long term.

- **Agriculture, forestry, fishing, and hunting** continue to play a meaningful role in the local economy, accounting for approximately 1,400 jobs and reinforcing the role the Counties plays in Ontario's agri-food system; 94% of these jobs in the census division are located in the Counties proper. This sector is composed of a diverse range of farm-based and agri-food businesses spanning livestock production, crop farming, specialty agriculture, and related value-added activities.

- **Office-intensive sectors** such as professional, scientific and technical services, finance and insurance, and information and cultural industries are present but comparatively modest in scale. This suggests that future employment growth is more likely to be driven by health care, education, construction, retail, and tourism-related activities rather than large-scale office employment.

Figure 6: UCLG Census Division Employment by NAICS, 2021

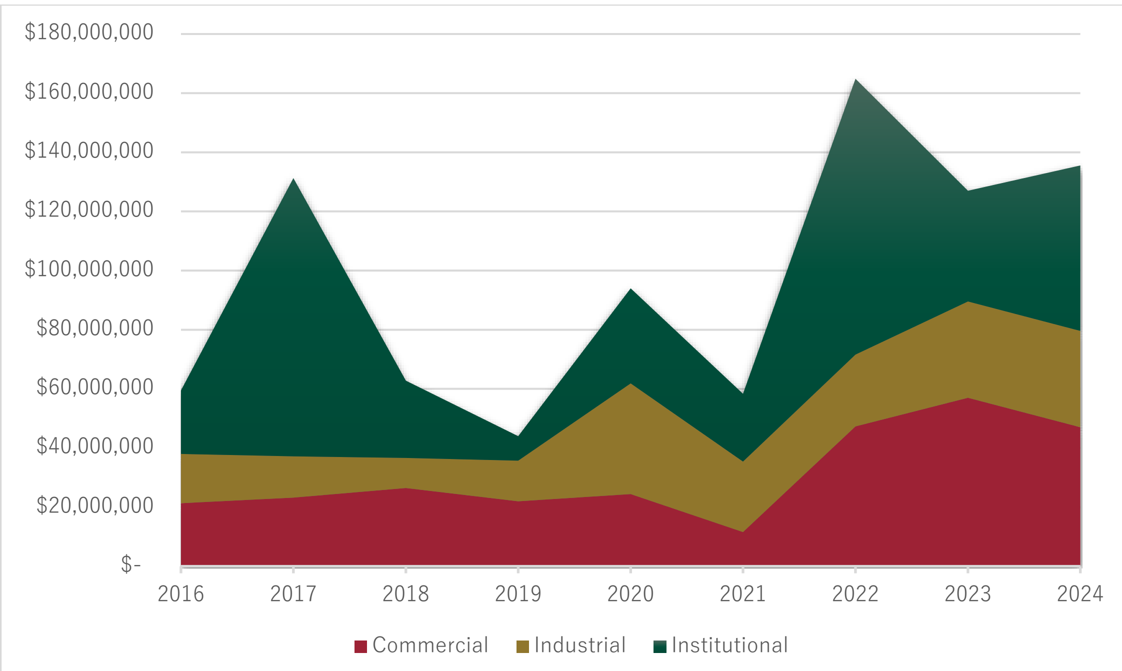
Source: Statistics Canada, North American Industry Classification System

It is noted that tourism and lifestyle-based economic activity underpin much of the employment base in rural parts of the Counties. These economic activities are supported by the area's natural amenities, waterfront landscapes, and cultural attractions, particularly those associated with the Rideau Canal and the St. Lawrence River corridor. These activities include accommodation services, recreation and outdoor tourism, heritage attractions, and seasonal hospitality businesses, which contribute to local employment, attract visitors, and enhance the Counties' quality of life and residential appeal.

ii. Recent Employment Construction

Between 2016 and 2024, the UCLG census division experienced significant investment across all non-residential sectors—commercial, industrial, and institutional—particularly in 2017 and 2022. Figure 7 shows the non-residential value of building permits in the census division since 2016. While growth in any one year is strongly influenced by large-scale investments, particularly public sector institutions and commercial retail stores, the relatively sustained growth in recent years supports the employment forecasts set out in this report.

Figure 7: Value of Non-Residential Building Permits in the UCLG Census Division, 2016-2024



Source: Statistics Canada Building Permits

iii. Commuting Trends

Commuting patterns within the UCLG census division reflect a strong reliance on external employment centres, particularly Ottawa and, in the western portion of the Counties, Kingston. In 2021, 20,425 residents both lived and worked within the census division. However, out-commuting significantly exceeded in-commuting: approximately 9,470 residents travelled outside the census division for work, compared with about 3,670 workers who commuted into the census division for employment (see Figure 8).

Figure 8: 2021 Place of Work Commuting Flows in the UCLG CD

UCLG CD Commuting Flows, 2021	
Live and Work In UCLG	**20,425**
Total In-Commuting	3,670
Total Out-Commuting	9,470
Net Commuting	**-5,800**
Top 5 In-Commuting Municipalities	
Ottawa	1,130
Kingston	625
South Dundas	380
North Dundas	235
Smiths Falls	205
Top 5 Out-Commuting Municipalities	
Ottawa	3,370
Kingston	2,360
Smiths Falls	1,515
South Dundas	310
North Dundas	295

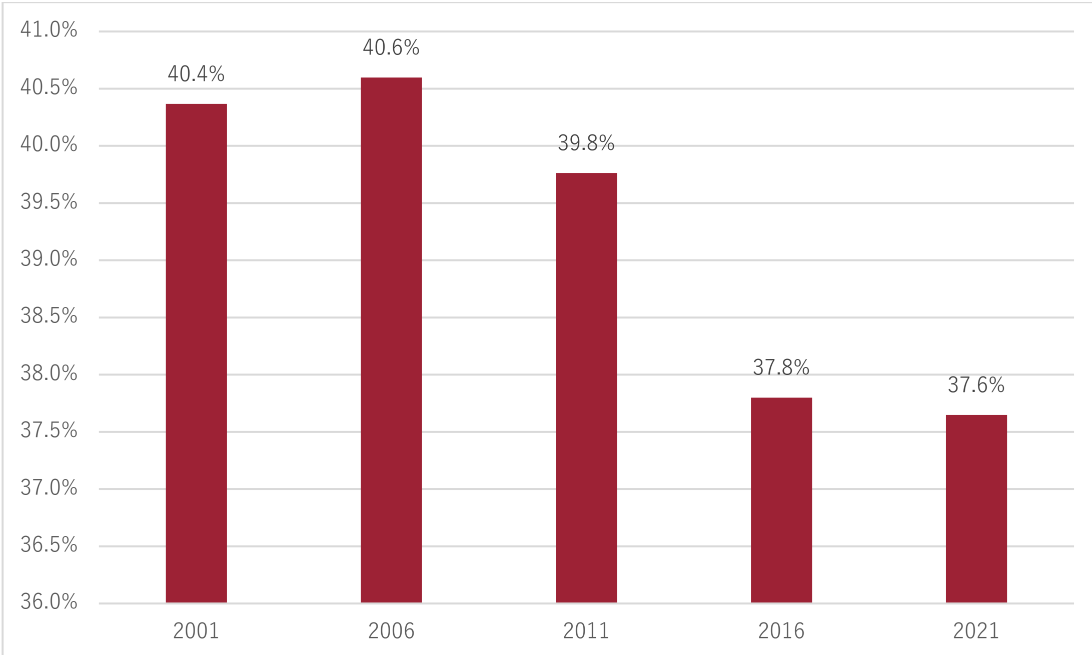
Source: Statistics Canada Special Run data

iv. Activity Rates

During the recent period of population growth, employment growth has not kept pace. As shown in Figure 9, the activity rate—defined as the ratio of total place-of-work employment to the Census population—has trended downward in the UCLG census division since 2006.

It is important to note, however, that the 2021 Census was conducted during the height of the COVID-19 pandemic. As a result, the employment data from that year should be interpreted with caution and may be less reliable as an indicator of longer-term structural trends.

Figure 9: UCLG Census Division Activity Rate, 2001-2021



Source: Statistics Canada, Census of Canada 2001-2021

In recent years, commuting and remote work have expanded the connection between the Counties and the wider economy. People who live locally but work elsewhere still contribute to the community by supporting local businesses, schools, and services. This helps strengthen the local economy even when jobs are not physically based in the Counties.

A key objective of the PPS 2024 and Counties' Official Plan is to build "complete communities", that is communities where people can work close to where they live, without extended commuting distances. The growth forecasts and land needs assessment in this report provide an opportunity for the Counties to promote employment growth within Leeds and Grenville, including on designated employment lands, to increase activity rates and promote complete communities.

3. GROWTH FORECASTS TO 2051

This section sets out the population, household, housing by type, and employment by type growth forecasts for the UCLG census division, the Counties, and the 10 local municipalities within the Counties to 2051. Detailed forecast tables for each local municipality are provided in Appendix B.

A. TWO GROWTH SCENARIOS WERE DEVELOPED

The UCLG population forecasts are based on a regional growth forecast model that looks at demographic and economic trends for the entire census division. Two forecast scenarios were prepared:

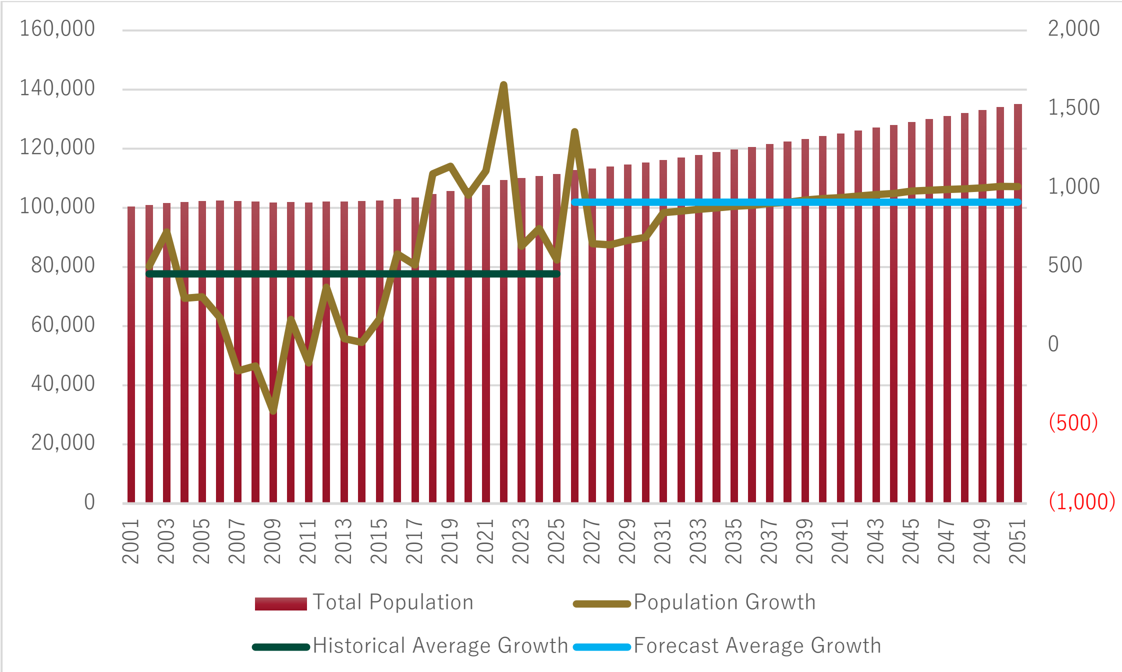
- The Baseline Scenario is based on the MOF Population Projections and achieves a census division population of 132,030 by 2051;
- A High Growth Scenario, which assumes about 10% more intra-provincial in-migration to the census division, achieves a census division population of 135,000 by 2051.

On December 10, 2025, Counties Council adopted the use of the High Growth Scenario in principle. As no further input or concerns have been received during subsequent public consultations, the forecast details and the land needs assessment analysis that follow are based on the High Growth Scenario.

B. COUNTIES-WIDE POPULATION GROWTH FORECAST UNDER THE HIGH GROWTH SCENARIO

As noted above, under the High Growth Scenario, the UCLG census division is forecast to exceed the MOF Projections by nearly 3,000 people in 2051 (see Figure 10).

Figure 10: UCLG Census Division Population Growth Under High Growth Scenario to 2051



Source: Statistics Canada, Annual Demographic Estimates (historical); Hemson Consulting based on MOF Population Projections (forecast)

The UCLG's census division population is forecast to grow from 107,700 residents in 2021 to approximately 135,000 residents by 2051. This represents an increase of more than 27,000 people, or an average annual growth rate of about 0.8%. Growth is expected to be strongest now with the population reaching an estimated 113,000 by 2026. While the pace of growth is projected to gradually moderate over time, it remains positive throughout the forecast period. By the 2030s and 2040s, annual growth rates are expected to stabilize between 0.7% and 0.8%, indicating consistent, long-term population increases.

By 2051, the UCLG's census division population is projected to be approximately 25% larger than it was in 2021. This sustained growth will have important implications for housing, transportation, infrastructure, community services, and economic development.

C. KEY DEMOGRAPHIC ASSUMPTIONS UNDER THE HIGH GROWTH SCENARIO

Population change results from two processes: natural increase and net migration.

i. Natural Increase

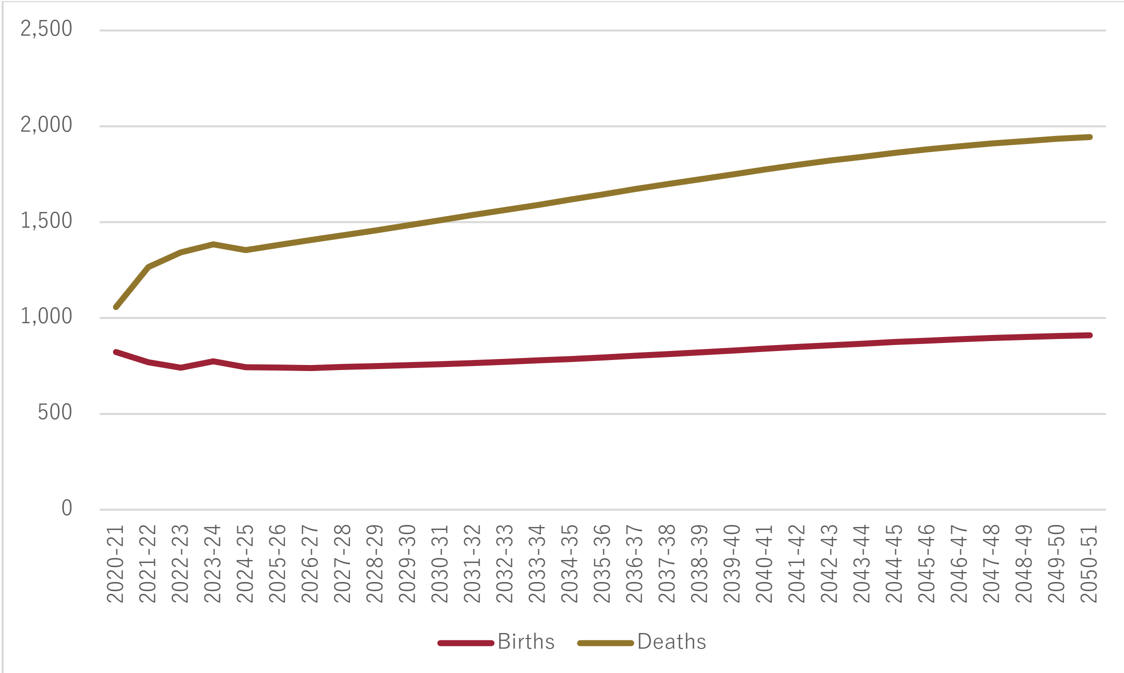
Natural increase is the difference between the number of births and deaths over a given period. Projections of births are based on fertility rate assumptions while projections of deaths are based on assumptions about life expectancy. Fertility rates measure the average number of children born per woman by the age of mother in a given year. They are expressed in this growth forecast as the total fertility rate, which represents the average number of children to be born to a woman if current fertility rates prevail over her reproductive life.

Figure 11 outlines the projected births and deaths in the UCLG census division from 2020 to 2051 under the High Growth Scenario. Since 2016, the natural decrease averaged approximately 428 persons per year. While births remained relatively stable, at around 800 births per year, deaths have continued to increase, widening the gap between births and deaths.

Through the mid-2020s and 2030s, the natural decrease is projected to grow steadily. Annual losses increase from approximately 428 people per year to more than 760 people per year. By the 2040s, the Counties natural decrease becomes more pronounced. Annual losses exceed 950 people per year. Although births gradually rise over time, they are outpaced by a faster increase in deaths.

By 2050–51, the Counties are projected to experience a natural decrease of approximately 1,030 people in a single year, roughly four times the annual loss seen at the start of the period.

Figure 11: Natural Increase in the UCLG Census Division Under High Growth Scenario to 2051



Source: Hemson Consulting

The sustained natural decrease means that population growth in the UCLG will depend largely on net migration.

ii. Net Migration

Migration is the dominant driver of population growth in the UCLG census division and a central component of this population forecast. Over the forecast period to 2051, the largest source of population growth from migration will be intra-provincial migration (see Figure 12). This is consistent with historical trends, as population growth in the UCLG census division has been driven primarily by in-migration from other parts of Ontario—most notably the City of Ottawa—over recent decades. Figure 12 highlights several key migration patterns:

- **International migration** contributes positively to population growth but remains relatively modest when compared with other sources. Nevertheless, the contribution from international migration is projected to increase gradually over the forecast period, reflecting broader national immigration patterns that are expected to support population growth in smaller communities.

- **Interprovincial migration**—movement from other provinces—is forecast to remain modest throughout the projection period, although somewhat higher than historical averages. Despite this increase, it is not expected to represent a major driver of long-term population growth in the UCLG census division. The projections suggest that migration from other provinces, including nearby Quebec, is unlikely to occur at levels that would materially influence overall population growth.

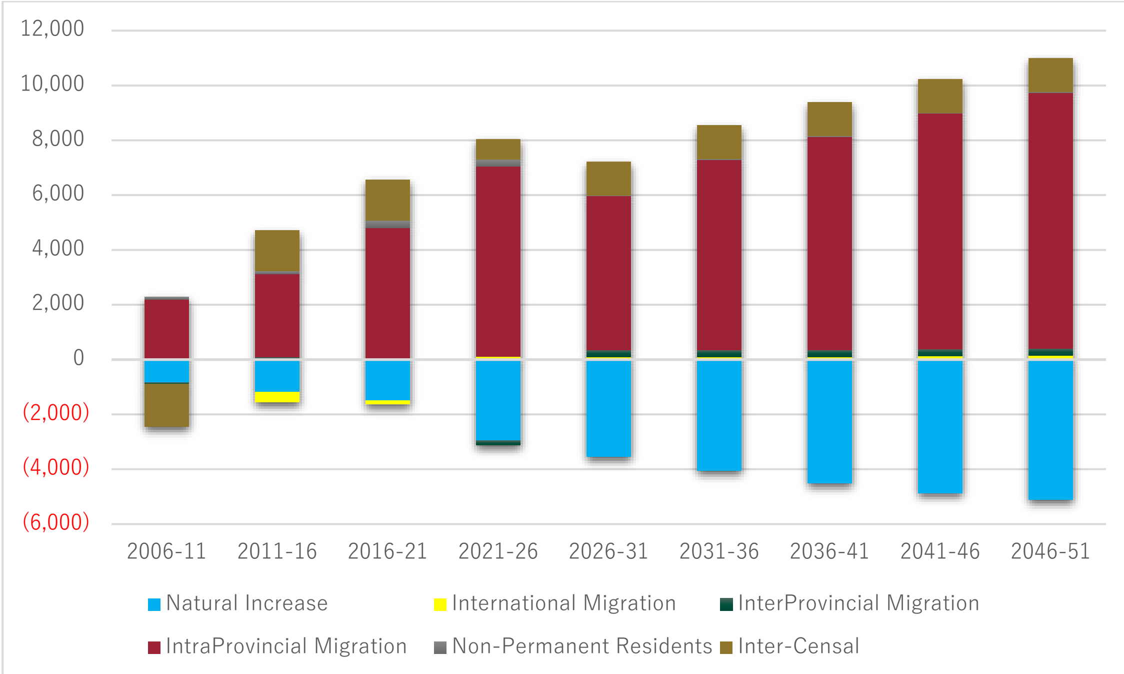
- **Intraprovincial migration** representing movement from other municipalities within Ontario, will continue to be the largest contributor to population growth in the UCLG census division. Historically, this source of growth has averaged nearly 700 net new residents annually since 2006. Over the forecast period, this growth is expected to intensify, averaging more than 1,500 net new residents per year. The increasing importance of intra-provincial migration suggests that the UCLG census division is becoming more attractive to residents from other parts of Ontario, particularly the City of Ottawa. This trend may reflect a combination of factors, including relative housing affordability, lifestyle considerations, and proximity to major urban employment centres.

- **Non-permanent residents** including international students and their families as well as temporary foreign workers, also contribute to population change. The largest influx of non-permanent residents occurred over the past decade; however, this group is not expected to represent a significant or sustained source of population growth over the long term.

Overall, the High Growth Scenario assumes that net intra-provincial migration will account for the largest share of population growth in each forecast period after 2025 and will increasingly offset the effects of declining natural increase (see Figure 12).

A migration-led growth trajectory will lead to demand for a greater range and mix of housing and employment opportunities in the UCLG census division and underscores the importance of planning for a diverse population base.

Figure 12: Components of Population Growth in the Census Division Under the High Growth Scenario, 2006-2051



Source: Statistics Canada, Census of Canada 2006-2021 (historical); MOF Population Projections (forecast)

iii. Age Structure

The amount and type of housing needed in the UCLG census division is strongly related to the population age structure. The Counties' labour force is also closely tied to age structure as the primary determinant of the size and availability of labour is the size of the working age population between about 20 and 65 years of age.

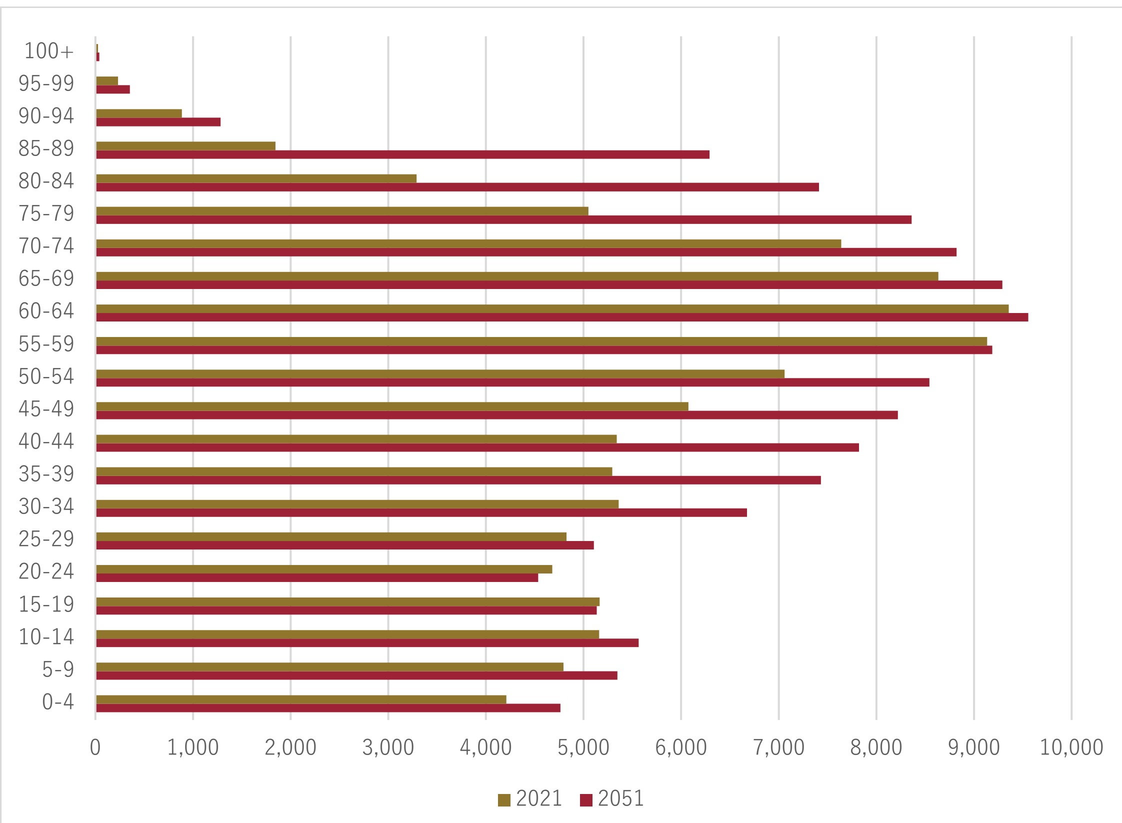
Between 2021 and 2051, the UCLG's census division population structure is projected to shift across all major age groups, however, will remain generally consistent. Absolute growth in working age cohorts, adults 25 to 54, and seniors cohorts 75+ will be especially pronounced (see Figure 13).

- **Younger Age Cohorts** – The population aged 0 to 24 is expected to remain steady over the projection period, although the share of the overall population represented by this group will decline. In 2021, this age group represented 23% of the population and in 2051 will be nearly 20%. Child and youth cohorts exhibit absolute growth, reflecting continued household formation and sustained population inflows. This growth will support ongoing demand for childcare, schools, post-secondary institutions, recreation facilities, and family-oriented housing, particularly in areas experiencing new residential development.

- **Working Age Cohorts** – The 25 to 64 age cohorts, which represents the UCLG's core working-age population, are projected to experience a sizeable absolute increase. Growth is anticipated across all cohorts in this range, particularly among adults aged 30 to 54. In 2021, this cohort represented half the total population, while in 2051, this share will decline slightly to 48%. This trend reinforces the importance of maintaining a strong employment base, expanding transit and transportation infrastructure, and ensuring a diverse housing supply that accommodates both early and mid-career households.

- **Older Adult Cohorts** – The 65 and over population is projected to grow the most in absolute terms, though without fundamentally reshaping the UCLG's age structure. While growth occurs across all senior age groups, the most rapid increases are among older seniors, particularly those in their 80s. The population aged 90+ is projected to remain stable by 2051. In 2021, this age cohort represented 26% of total population and this figure is forecasted to increase to 32% in 2051. This shift will significantly increase demand for accessible housing, health care services, long-term care, and age-friendly community design.

Figure 13: UCLG Census Division Change in Population Age Structure 2021-2051



Source: Hemson Consulting based on Statistics Canada, 2021 Census, and High Growth Scenario forecasts

While inflows of younger adults and working-age households to the UCLG will contribute somewhat to a relatively balanced age structure, the number and share of seniors aged 65+ in the UCLG is expected to rise steadily through the 2030s and 2040s. As such, planning for 2051 will need to balance investments in education, employment, housing, and transportation with an expanded focus on seniors' services and accessibility to support residents at all stages of life.

D. COUNTIES-WIDE HOUSEHOLDS AND HOUSING UNDER THE HIGH GROWTH SCENARIO

Housing is the single largest consumer of urban land in the census division and consequently a vital component in planning for future land requirements. In order to forecast housing needs in Leeds and Grenville, the population forecast under the High Growth Scenario is translated into a household forecast by applying assumptions about household formation rates (or headship rates). Housing demand is then derived by forecasting the housing types by each age cohort within the adult population that forms households.

i. Household Formation

Age is the primary determinant of household formation, and the forecast method explicitly reflects the close relationship between age and the likelihood of forming a household. Households are forecast by applying age-specific household formation rates to the projected population in each adult age cohort and aggregating the results.

Household formation reflects the process by which people separate from existing households to form new households. It is a social phenomenon that is driven by critical events during a lifetime: leaving the parental home; forming partnered relationships; having children; divorcing; losing a spouse; and transitioning into shared or supportive living arrangements. Historically, economic factors have had a limited influence on household formation overall. However, younger adults are more sensitive to economic cycles and housing market conditions, often delaying household formation during periods of economic uncertainty.

The household growth forecast is for approximately 15,500 over the forecast period, from 44,615 households in 2021 to 60,145 households in 2051. Detailed household forecasts are provided in Appendix B.

ii. Housing by Type

The next step in the forecast method is to convert the household forecast for the census division into a forecast of housing by type: ground-related housing categories; and apartment buildings.

Figure 14 compares housing growth by unit type over the past 20 years with projected growth over the forecast period to 2051 under the High Growth Scenario. The data shows that total housing growth has increased moderately since 2006, reaching a peak in the period immediately following the 2021 Census. Looking ahead, overall housing growth is projected to continue at a pace above historical averages throughout the forecast horizon.

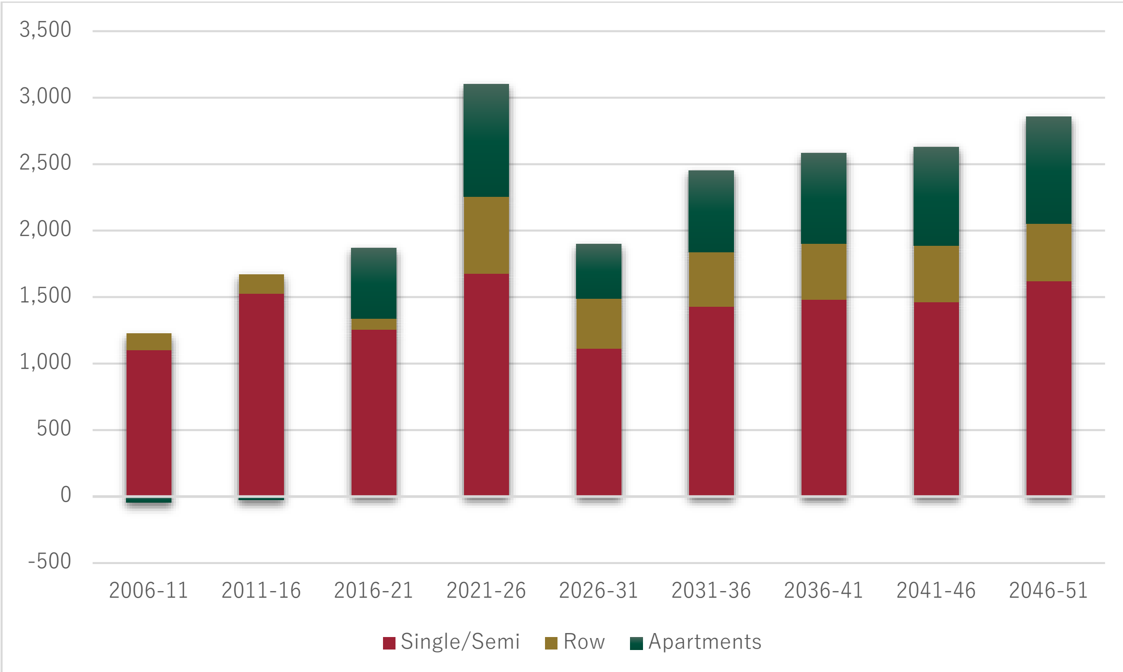
- **Single and Semi-Detached Housing** – These dwelling types are projected to account for the largest share of housing growth in every forecast period. Since 2006, single-detached units in particular have consistently comprised a substantial portion of net household growth, especially during the recent period of accelerated population growth. After 2026, growth in single and semi-detached units is expected to decline gradually. However, these forms are projected to continue representing approximately one-half or more of all new housing throughout the forecast period.

- **Row Housing** – Row housing is forecast to experience steady and moderate growth across all periods. Growth increases through the 2021–2026 period and then remains relatively stable thereafter, with only a modest decline in later years. As growth in single and semi-detached housing slows, row housing is expected to accommodate an increasing share of total housing growth, reflecting a gradual diversification of the UCLG's housing stock.

- **Apartment Housing** – Apartment development was limited in the early years of the historical period but has increased notably since 2016 and is sustained through the remainder of the forecast horizon. Apartments will continue to account for a significant share of total housing growth throughout the forecast. This trend reflects a growing demand for more compact and accessible housing forms, particularly among smaller households and seniors.

Overall, the projected trends point to strong near-term demand for low and medium density housing, particularly during the 2021–2031 period, followed by a gradual shift toward higher-density housing forms over the medium to long term. This evolution is consistent with demographic aging, affordability pressures, and the need for more efficient use of land and infrastructure. Collectively, these findings underscore the importance of maintaining a balanced and flexible housing strategy through introducing minimum density targets for new greenfield areas which can better respond to the Counties evolving household needs.

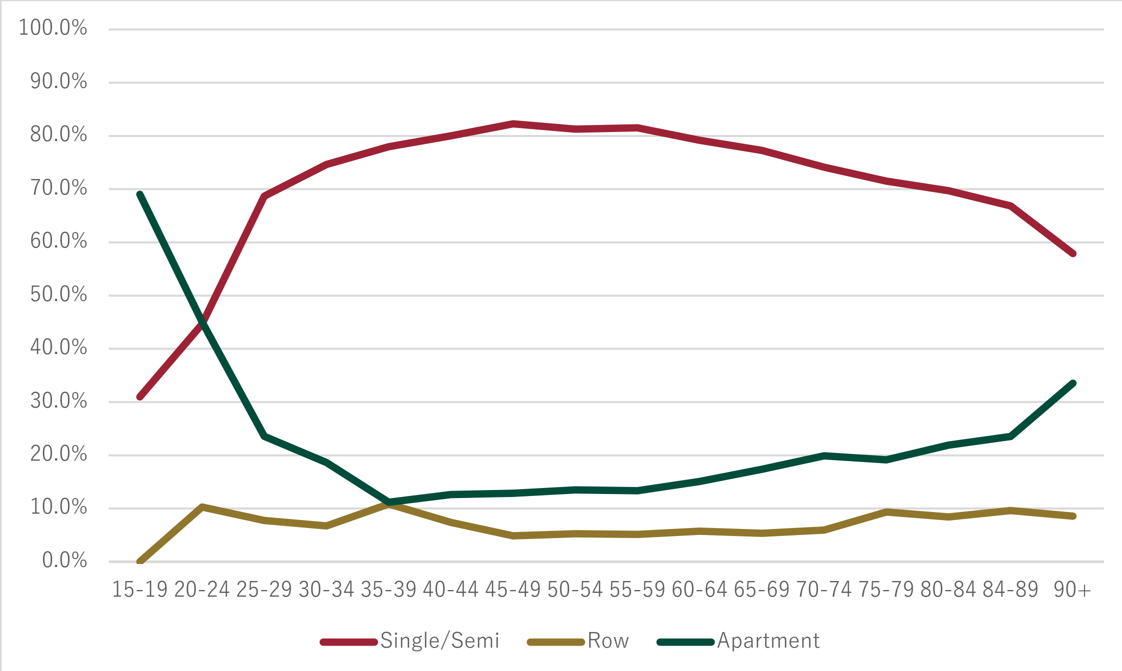
Figure 14: UCLG Census Division Housing Growth Under the High Growth Scenario 2006-2051



Source: Statistics Canada, Census of Canada 2006-2021 (historical); Hemson Consulting (forecast)

Although the housing forecast assumes a broader range and mix of housing types over time, overall housing preferences by age cohort are not expected to change significantly. Figure 15 illustrates the projected housing occupancy patterns in the UCLG census division in 2051, which remain broadly consistent with the age-based occupancy patterns observed in 2021 and presented in Figure 3. This suggests that future changes in the housing mix are driven primarily by shifts in population size and age structure, rather than by fundamental changes in household housing preferences.

Figure 15: 2051 Housing Type Preferences by Age in the UCLG Census Division



Source: Hemson Consulting (High Growth Scenario)

E. ALLOCATION OF GROWTH TO COUNTIES AND LOCAL MUNCIPALITIES UNDER THE HIGH GROWTH SCENARIO

Allocating the UCLG census division total population, household, and housing growth to the Counties and local municipalities combines market demands and recent growth trends, planning policy direction—including the hierarchy of settlement areas set out in the Counties Official Plan—and the availability of designated and serviced land to accommodate residential development. In general, growth is primarily directed to established urban and serviced settlement areas, while more modest growth is focused in rural settlement areas and rural areas.

i. Population

Table 1 illustrates the total population forecast for each local municipality to 2051. Total population includes the census base population plus a factor for people missed by the census, commonly referred to as the estimated net-undercoverage rate. The forecast shows that every municipality is expected to grow, although the scale of growth varies by community.

North Grenville functions as the Counties' main population anchor and is forecasted to accommodate a significant share of overall population growth and urban-style development. Increasing from about 18,650 residents in 2021 to over 33,000 by 2051, North Grenville is forecast to continue to be the principal location for new housing, commercial activity, and institutional services within the Counties.

Communities such as Augusta, Edwardsburgh-Cardinal, Leeds and the Thousand Islands, and Elizabethtown-Kitley are all projected to experience higher-than-historical population growth. These municipalities are expected to play a larger role in accommodating future residents due to their ability to absorb growth within settlement areas (rural and urban), the availability of developable land and, in some cases, planned expansions to municipal servicing infrastructure, such as those contemplated in the Riverview Heights Secondary Plan area in Augusta.

Table 1: Total Population Forecast by Local Municipality to 2051

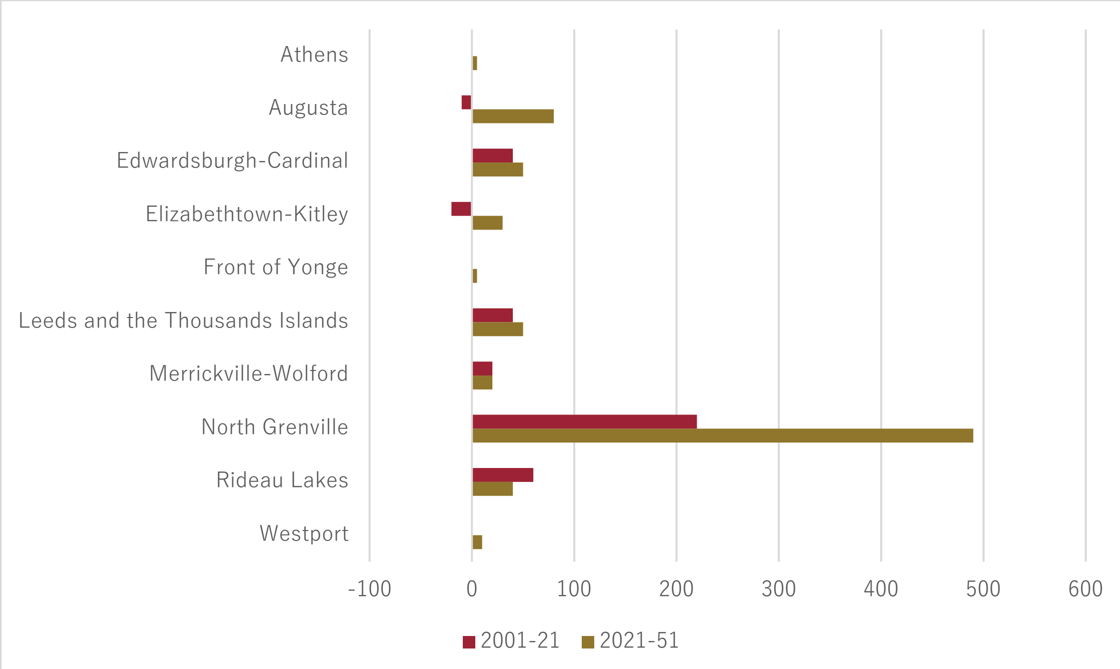
Total Population							
	2021	2026	2031	2036	2041	2046	2051
Athens	3,150	3,150	3,180	3,200	3,220	3,250	3,280
Augusta	7,640	7,780	8,140	8,600	9,090	9,620	10,180
Edwardsburgh-Cardinal	7,790	7,990	8,160	8,450	8,740	9,050	9,370
Elizabethtown-Kitley	9,880	10,030	10,110	10,230	10,360	10,510	10,670
Front of Yonge	2,690	2,720	2,730	2,740	2,750	2,770	2,790
Leeds and the Thousand Islands	10,150	10,420	10,530	10,750	10,980	11,250	11,540
Merrickville-Wolford	3,230	3,420	3,520	3,620	3,720	3,820	3,920
North Grenville	18,650	20,340	22,500	25,150	27,880	30,610	33,460
Rideau Lakes	11,260	12,310	12,350	12,370	12,410	12,480	12,540
Westport	650	780	830	880	930	980	1,030
UCLG	**75,090**	**78,940**	**82,050**	**85,990**	**90,080**	**94,340**	**98,780**

Source: Hemson Consulting

Smaller and more rural municipalities such as Athens, Front of Yonge, and Merrickville-Wolford are projected to continue growing at a slower pace than the Counties-wide average, although still at rates above historical trends. Westport has also experienced high population growth in recent years, which has influenced the forecasts results. However, the community's physical and land supply constraints are expected to moderate growth over the longer term.

Figure 16 compares the historical annual growth (2001-2021) and the forecast annual growth (2021-2051) in each municipality.

Figure 16: Annual Population Growth in Local Municipalities (High Growth Scenario)



Source: Statistics Canada, Census of Canada 2001-2021 (historical); Hemson Consulting (High Growth Scenario)

ii. Households

Households in the Counties are projected to grow steadily from 2021 to 2051, increasing from approximately 29,530 to about 42,270. This represents sustained long-term growth across the Counties, reflecting ongoing population increases, household formation, and housing demand. This growth represents 1.2% annually under the High Growth Scenario.

Growth is not evenly distributed across municipalities. North Grenville remains the largest centre throughout the projection period and continues to see rapid increases in households, reinforcing its role as the Counties' primary urban settlement area. North Grenville is forecasted to receive nearly 60% of all household growth in the Counties. North Grenville is followed by Augusta with nearly 12% of Counties' growth to 2051. In particular:

- growth in Augusta considers development proposals and the ultimate growth potential of the Riverview Heights Secondary Plan area;[4] and

[4] Located immediately west of the Town of Prescott, between Highway 401 and County Road 2, the Secondary Plan area is subject to an agreement between the Township of Augusta and the Town of Prescott for the extension of municipal water and wastewater services from Prescott into the area. The lands have an estimated ultimate development potential of approximately 2,900 housing units.

- growth in Elizabethtown-Kitley recognizes the units associated with the special serviced residential campus area and ancillary commercial uses recently approved through a Minister's Zoning Order on the former Row's Corners Fairground.

Other municipalities—including Edwardsburgh-Cardinal, Leeds and the Thousand Islands—experience consistent and moderate growth over the forecast period, contributing steadily to the overall Counties' household total. These communities reflect stable housing demand without sharp fluctuations. Table 2 illustrates the household forecast for each local municipality.

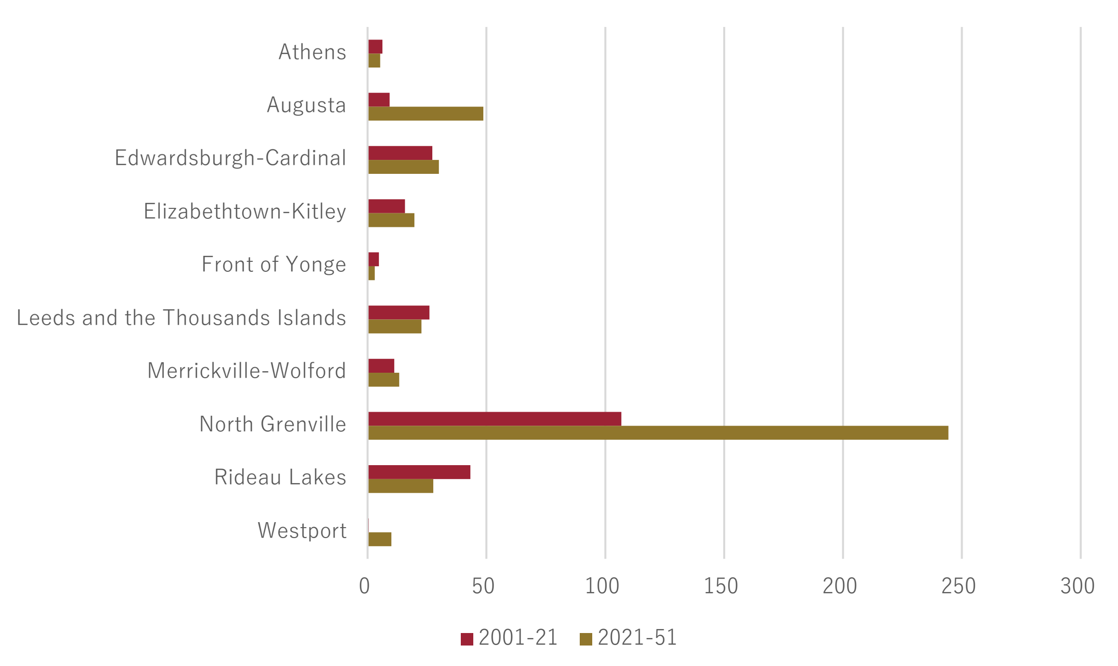
Table 2: Household Forecast by Local Municipality to 2051

	Households						
	2021	2026	2031	2036	2041	2046	2051
Athens	1,220	1,260	1,280	1,310	1,330	1,350	1,380
Augusta	2,950	3,130	3,320	3,570	3,830	4,110	4,410
Edwardsburgh-Cardinal	3,140	3,270	3,360	3,520	3,690	3,860	4,040
Elizabethtown-Kitley	3,790	3,930	3,990	4,090	4,180	4,270	4,380
Front of Yonge	1,080	1,100	1,110	1,120	1,140	1,160	1,170
Leeds and the Thousand Islands	3,990	4,190	4,260	4,350	4,450	4,550	4,670
Merrickville-Wolford	1,290	1,380	1,430	1,500	1,570	1,630	1,690
North Grenville	7,040	7,960	8,940	10,220	11,560	12,920	14,370
Rideau Lakes	4,700	5,240	5,240	5,230	5,310	5,420	5,530
Westport	330	410	495	605	630	630	630
UCLG	**29,530**	**31,870**	**33,425**	**35,515**	**37,690**	**39,900**	**42,270**

Source: Hemson Consulting

A comparison of historical (2001–2021) and forecast (2021–2051) average annual household growth shows a clear acceleration in several municipalities (see Figure 17).

Figure 17: Annual Household Growth in the Counties Under the High Growth Scenario



Source: Statistics Canada, Census of Canada 2001-2021 (historical); Hemson Consulting (High Growth Scenario)

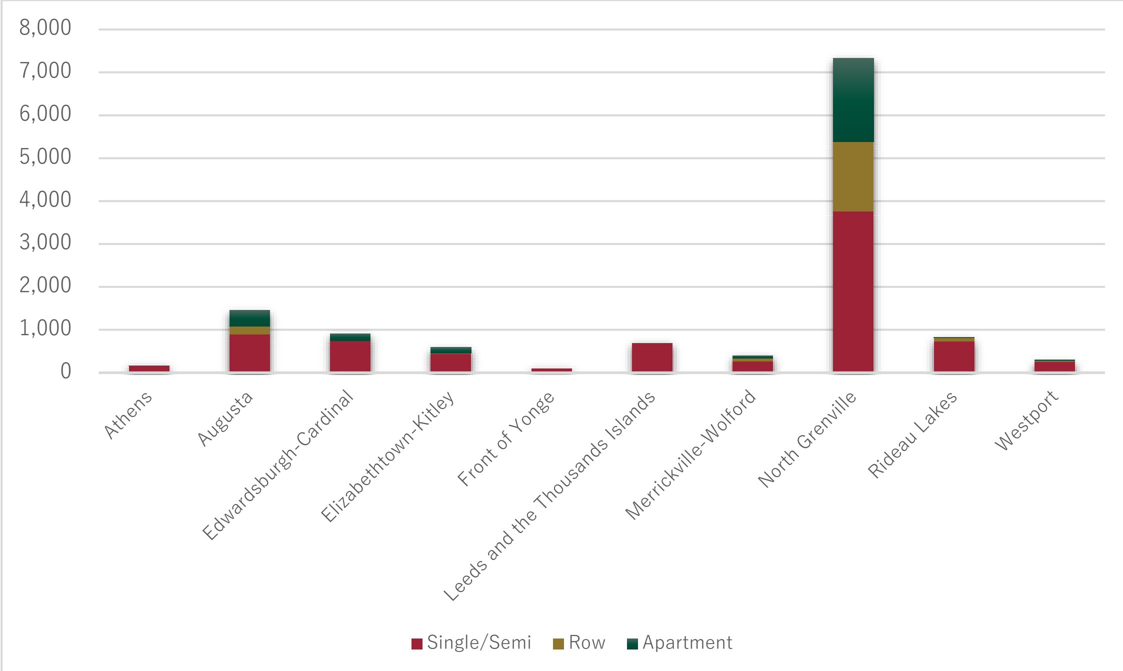
iii. Housing by Type

From 2021 to 2051, household growth across the municipalities is projected to vary significantly by location and housing type. North Grenville is expected to experience the largest increase in households, approximately 50% of which will take the single and semi-detached form, indicating continued low-density development. North Grenville is also projected to accommodate a substantial share of its growth through row houses and apartment units, reflecting a higher-density, urban development pattern.

Moderate increases in predominately low-density housing forms will be seen in Edwardsburgh-Cardinal, Elizabethtown-Kitley, Rideau Lakes and Leeds and the Thousand Islands. This growth pattern is consistent with historical trends and will maintain the existing character in each municipality. The forecast for Elizabethtown-Kitley considers the development potential associated with the redevelopment of the Rows Corners Fairgrounds for rental housing.

Figure 18 shows the forecasted household growth by structure type in the Counties.

Figure 18: Housing Growth by Type in the Counties, High Growth Scenario, 2021-2051



Source: Hemson Consulting

F. UCLG CENSUS DIVISION EMPLOYMENT FORECASTS UNDER THE HIGH GROWTH SCENARIO

For the most part, the employment forecast for the UCLG census division is driven by the anticipated increase in population. Total employment growth is differentiated by economic sector and land-use type. Population-related (or general) employment, employment land employment (such as manufacturing), and rural employment each have distinct built-form and locational requirements. Work-from-home trends are also considered, recognizing their influence on both employment location and commuting behaviour.

Looking forward, employment in the UCLG census division is forecast to grow steadily through to 2051. Total employment is forecasted to increase from approximately 39,240 jobs in 2021 to more than 49,000 jobs by 2051. This represents an increase of nearly 9,900 jobs over the 30-year forecast period, or an average annual growth rate of approximately 0.8%.

Overall, the employment forecast indicates a positive long-term outlook for the UCLG economy. The forecasted increase in jobs supports the need for continued planning for employment lands, infrastructure, housing, and transportation to accommodate future economic growth.

G. ALLOCATION OF EMPLOYMENT GROWTH TO LOCAL MUNICIPALITIES UNDER THE HIGH GROWTH SCENARIO

Table 3 illustrates the total employment forecast for each member municipality in the Counties proper. The table shows that:

Table 3: Total Employment Forecast by Member Municipality to 2051

Place of Work Employment							
	2021	2026	2031	2036	2041	2046	2051
Athens	1,020	1,120	1,130	1,130	1,140	1,140	1,150
Augusta	1,460	1,630	1,820	2,060	2,280	2,600	2,980
Edwardsburgh-Cardinal	2,800	2,930	3,040	3,200	3,380	3,590	3,810
Elizabethtown-Kitley	2,770	2,880	2,970	3,090	3,250	3,430	3,630
Front of Yonge	800	810	820	830	850	860	890
Leeds and the Thousand Islands	2,170	2,270	2,310	2,390	2,460	2,540	2,630
Merrickville-Wolford	1,200	1,230	1,260	1,300	1,410	1,430	1,440
North Grenville	7,290	7,860	8,420	9,080	9,670	10,220	10,730
Rideau Lakes	2,100	2,490	2,550	2,620	2,710	2,810	2,930
Westport	260	280	280	280	280	280	280
UCLG	**21,870**	**23,500**	**24,600**	**25,980**	**27,430**	**28,900**	**30,470**

Source: Hemson Consulting

- **North Grenville** is forecast to remain the largest employment centre in the Counties throughout the forecast period. Employment is forecasted to increase from about 7,500 jobs in 2021 to nearly 11,000 jobs by 2051, about 41% of total Counties employment growth, reinforcing its role as the primary economic hub within the Counties.

- **Augusta** is expected to experience strong employment growth, increasing from approximately 1,460 jobs in 2021 to nearly 3,000 jobs by 2051, or 19% of total Counties employment growth. This growth reflects an expanding service and residential-related employment base.

- **Edwardsburgh-Cardinal** and **Elizabethtown-Kitley** are also projected to see consistent increases in employment, about 23% of Counties employment growth in both municipalities. Employment in these municipalities will be mixed, with significant growth in employment areas in addition to population-related employment.

- The remaining municipalities, **Athens, Front of Yonge, Merrickville-Wolford, Leeds and the Thousand Islands, Rideau Lakes, and Westport** will see slower, but positive employment growth. These municipalities collectively contribute about 16% of overall Counties employment growth to 2051.

Overall, the employment projections indicate balanced growth across the Counties, with continued concentration in North Grenville and strong relative gains in several municipalities. This pattern supports the need for ongoing planning for employment lands, transportation, and supporting infrastructure to accommodate long-term economic growth across the Counties.

i. Employment by Land-use Type

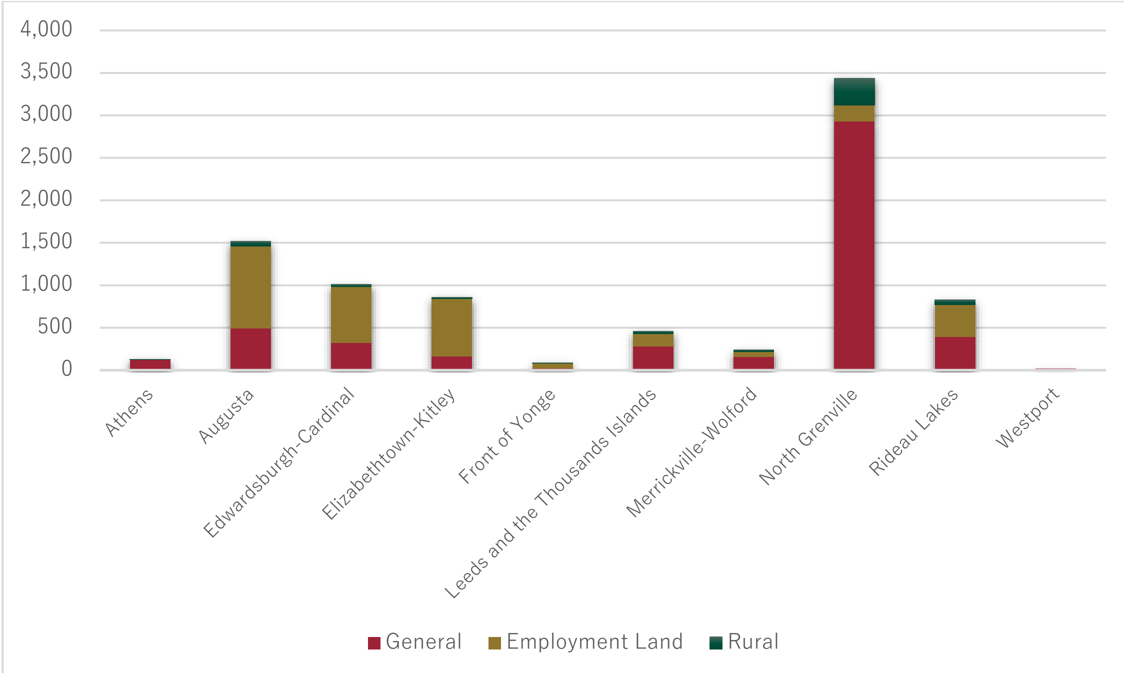
Figure 19 illustrates the employment growth by land-use area to 2051 for each local municipality in the Counties under the High Growth Scenario. Most new jobs are forecast to occur within built-up settlement areas, particularly in North Grenville, acting as the primary service centre in the Counties. These settlement areas are expected to see strong growth in "population-related"[5] employment—retail, office, institutional, and service-based employment—reflecting their role as regional hubs that provide services and amenities for surrounding municipalities.

Employment on designated employment areas—lands planned primarily for manufacturing and activities ancillary to manufacturing under the PPS 2024—are also projected to experience significant growth. Augusta, Edwardsburgh-Cardinal, and Elizabethtown-Kitley show the largest increases in this type of employment, indicating continued demand for well-located lands along major good corridors that support manufacturing, logistics, and other industrial uses. A limited amount of employment growth is forecast for general industrial lands in Rideau Lakes. These lands, however, are not anticipated to be ready for development within the short-term.

Smaller municipalities such as Athens, Front of Yonge, Leeds and the Thousand Islands, Merrickville-Wolford and Westport are projected to experience more moderate employment growth. In these areas, new jobs are expected to be distributed across a mix of employment lands, local service uses, and rural-based activities that align with community scale and available infrastructure.

[5] Renamed "General" employment under the Draft Projection Methodology Guidelines.

Figure 19: Employment Growth by Land-Use Type in the Counties, 2021-2051



Source: Hemson Consulting

Rural employment growth is anticipated to remain modest but steady across the Counties. This includes jobs related to agriculture, resource-based industries, tourism, and rural commercial/industrial uses which are located within or along local rural commercial area or corridors. Rural municipalities are expected to accommodate a higher proportion of this type of employment, reflecting their rural character and economic base.

Overall, the employment growth pattern reflects a balanced approach that strengthens urban settlement areas, protects and supports designated employment areas, and sustains rural economies. This distribution of jobs is consistent with PPS 2024 policy, which encourages compact development, long-term employment land protection, economic opportunities that align with local community context, focusing of employment in settlement areas and in proximity to major goods movement facilities and corridors.

ii. Treatment of Large-Scale Employment Uses

The employment forecasts prepared at both the Counties-wide and local municipal levels present “smoothed” growth trends over the forecast period to 2051. In practice, however, employment growth is likely to occur in a more uneven manner, as it is highly sensitive to broader macroeconomic conditions and can be significantly affected by the timing of large-scale development projects. In particular, the construction and commissioning of major employment uses can generate short-term spikes in employment that are not representative of longer-term economic conditions. Temporary increases in employment may also reflect construction-related activity rather than sustained job creation.

From a growth management perspective, the key consideration is whether, and how, such short-duration employment surges should be reflected in long-range employment forecasts and associated land needs assessments. Consistent with standard growth management practice, the forecasts focus on sustained, long-term employment that supports permanent population growth and ongoing demand for employment lands. Temporary construction-related employment associated with large-scale projects is therefore more appropriately acknowledged qualitatively or addressed through short-term accommodation, transportation, and servicing strategies, rather than being incorporated directly into long-term employment targets.

4. Land Needs Assessment Under the High Growth Scenario

This section sets out the results of the residential and non-residential (employment area) land needs assessment for the Counties. The purpose of the land needs assessment is to determine whether there is enough land within existing settlement areas to accommodate projected population and employment growth to the 2051 time horizon.

The policy basis for land needs assessments is found in PPS 2024 and Draft Methodology Guidelines. Under this framework, the need for land for new housing and employment area (or employment land) jobs is determined based on how much housing and employment growth can reasonably be accommodated within existing built-up areas and designated greenfield lands. The assessment considers opportunities for intensification and redevelopment, expected development densities, and the capacity of existing urban lands before concluding whether additional land is required.

Provincial policy places a strong emphasis on using land efficiently and supporting compact, complete communities. As a result, a land needs assessment must demonstrate that growth cannot be reasonably accommodated within existing settlement boundaries before any expansion of those boundaries is considered. This ensures that urban boundary expansions are supported by evidence and are only pursued where there is a clear need, taking into account infrastructure availability, servicing capacity, and long-term planning objectives.

The base year for the land needs assessment is 2024. As such, land supply data reflects 2024 conditions, and all housing and employment forecasts have been adjusted to a 2024 base.

A. RESIDENTIAL LAND NEEDS IN THE COUNTIES

Between 2025 and 2051, the Counties is forecast to grow by a total of 10,664 new housing units under the High Growth Scenario. This demand includes 6,640 single and semi-detached homes, 1,633 rowhouses, and 2,391 apartment units. Table 4 outlines the land needs for the Counties by policy area (rural vs. intensification vs. greenfield) and by unit type.

Table 4: Residential Land Needs to 2051 in the Counties

United Counties of Leeds and Grenville	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	6,640	1,633	2,391	10,664
Rural Lands Outside of Settlement Areas	*1,915*	*0*	*0*	*1,915*
Intensification within Urban Settlement Areas	*235*	*422*	*974*	*1,630*
Greenfield Land within All Settlement Areas	*4,490*	*1,211*	*1,417*	*7,119*
Settlement Area Land Need (units)	4,490	1,211	1,417	7,119
Settlement Area Land Need (net ha)	216.1	31.1	19.0	266.2
Net to gross Assumption				55%
Settlement Area Land Need (gross ha)	392.9	56.5	34.6	484.0

Source: Hemson Consulting

Note: Totals may not add up due to rounding.

A portion of this housing demand is expected to occur in rural areas in the form of low-density development. Rural areas account for 1,915 single and semi-detached units over the forecast period, with no rowhouse or apartment development anticipated in these locations. This equates to 18% of all units developed in the Counties.

Within municipalities with urban settlement areas, growth is divided between intensification and greenfield development. Urban intensification is expected to deliver a broad mix of housing types, including 235 single and semi-detached units, 422 rowhouse units, and 974 apartments. This reflects the role of existing built-up areas in accommodating higher-density and more compact forms of development. Although these units are dispersed throughout the settlement areas in Counties at differing rates, the overall intensification rate for municipalities with urban settlement areas is 20%. This is consistent with the policy direction in the Counties Official Plan.

The majority of future housing growth, however, is projected to occur on urban greenfield lands. Urban greenfield areas are expected to accommodate about 7,119 units in total, consisting of 4,490 single and semi-detached homes, 1,211 rowhouses, and 1,417 apartments. These figures define the overall urban greenfield land need for the planning period and represent the remaining 67% of total Counties growth.

To support this level of greenfield development, the Counties will require approximately 484 hectares of gross (developable) urban land. This includes approximately 393 gross hectares for single and semi-detached housing, 57 gross hectares for rowhouse development, and 35 gross hectares for apartments. These lands will also need to accommodate roads, parks, stormwater management, and other supporting infrastructure.

B. VACANT RESIDENTIAL LAND SUPPLY BY LOCAL MUNICIPALITY

The Counties has a total residential land supply of approximately 1,011.7 hectares of gross land across all settlement area types, urban and rural. This supply is distributed among these settlement types.

- **Urban settlement areas** account for over 260 hectares, representing 26% of the Counties total residential land supply. These lands are concentrated in larger urban communities where the majority of growth is intended to occur and are required to be fully municipally serviced. These settlement areas are located in North Grenville (Kemptville), Edwardsburgh-Cardinal (Cardinal), Leeds and the Thousand Islands (Landsdowne), Merrickville-Wolford (Merrickville) and Westport (Westport).

- **Rural settlement areas** comprise approximately 750 hectares and are generally privately serviced, although some municipalities offer limited servicing. These lands are more evenly distributed across the Counties. Rural settlement areas typically support more moderate levels of growth while maintaining a smaller-scale community character and lower housing densities. This includes future serviced areas in Augusta and Elizabethtown-Kitley.

A concept map showing the location of the residential land supply are provided in Appendix A.

Table 5: Vacant Residential Land Supply in UCLG by Type of Settlement Area (ha)

	Urban	Rural	Total
Athens	0.0	26.5	26.5
Augusta	0.0	159.5	159.5
Edwardsburgh-Cardinal	89.0	41.4	130.4
Elizabethtown-Kitley	0.0	33.8	33.8
Front of Yonge	0.0	14.1	14.1
Leeds and the Thousands Islands	50.1	109.2	159.4
Merrickville-Wolford	59.1	16.0	75.2
North Grenville	52.5	292.2	344.7
Rideau Lakes	0.0	56.4	56.4
Westport	11.7	0.0	11.7
UCLG	**262.4**	**749.2**	**1,011.7**

Source: Hemson Consulting, based on Counties and Local Municipal data.

Overall, the distribution of residential land supply across the Counties supports a balanced approach to growth, with higher concentrations in urban settlements and more limited, low density development in the rural settlements and rural areas.

i. Types of Land Supply

Clarifying how land supply should be interpreted across the two different settlement area types is a key consideration in the Counties. In particular, it is important to recognize that a hectare of land within a fully serviced urban settlement area has fundamentally different development potential than a hectare of land within a rural settlement area, which is typically reliant on private servicing. Development densities in urban settlement areas can reasonably reach the order of 25 units per net hectare, whereas densities in rural settlement areas are often more like 10-15 units per hectare due to servicing limitations. In North Grenville specifically, this report relies on the unit capacity of the rural settlement areas as set out in the Municipality's Long-term Population, Housing and Employment Study, dated December 13, 2023.

As a result, a municipality may appear to have a substantial overall land supply when both urban and rural settlement area lands are considered in aggregate yet still face a shortage of realistically developable land within its urban serviced settlement areas. For a hypothetical example, if Cardinal, as the urban settlement in Edwardsburgh-Cardinal, were approaching a limited remaining supply of serviced land, while rural settlement areas such as Spencerville contained significant vacant land, the municipality could nonetheless experience a functional land supply shortfall once achievable development densities are taken into account.

For this reason, while it is appropriate to monitor land availability across all settlement areas in the Counties, caution is warranted in assigning equal weight to lands within rural settlement areas. Land supply analysis should continue to clearly distinguish between settlement area types to ensure that future planning decisions are grounded in realistic assumptions about developable capacity and long-term growth needs.

C. RESIDENTIAL LAND NEEDS BY LOCAL MUNICIPALITY

This section provides a detailed assessment of residential land needs for each local municipality. In allocating housing growth at the local level, consideration has been given to the availability of municipal water and wastewater servicing. However, it should be noted that a comprehensive Counties-wide servicing capacity analysis has not been undertaken as part of this study. Furthermore, the current absence of municipal servicing has not necessarily been treated as a constraint on long-term growth potential, particularly in areas where future servicing expansions may be feasible.

i. North Grenville

Between 2025 and 2051, North Grenville is forecast to grow by approximately 6,244 new housing units. This demand includes 3,274 single and semi-detached dwellings, 1,289 rowhouses, and 1,681 apartment units, reflecting continued demand for ground-related housing alongside an increased role for medium and higher-density forms.

Of the total housing demand, approximately 624 units are anticipated to occur in rural areas in the form of single and semi-detached dwellings. Within the urban settlement area of Kemptville, approximately 1,249 units are expected to be accommodated through intensification, including a mix of rowhouse and apartment units.

The remaining 4,371 units are projected to be developed within urban greenfield areas, representing the largest share of future residential growth. This greenfield demand consists of 2,525 single and semi-detached units, 914 rowhouses, and 932 apartment units. To accommodate this development, an estimated 234.8 gross hectares of urban greenfield land will be required over the planning period.

Based on the current land supply inventory, the municipality has capacity to accommodate approximately 975 units within the urban settlement area of Kemptville and an additional 450 units within the rural settlement areas.

When compared to forecast housing needs, North Grenville has an overall urban greenfield land deficit of approximately 182.3 gross hectares. This indicates that, from an urban land supply perspective, the municipality does not currently have sufficient urban designated greenfield lands to accommodate anticipated residential growth to 2051. Based on the forecast absorption of available lands, the existing urban land supply is expected to be exhausted by the mid-2030s.

Accordingly, North Grenville will require additional urban settlement area lands to accommodate forecast growth over the planning horizon. Consistent with PPS 2024, any future settlement area expansion must minimize impacts on agricultural lands, natural heritage features, and infrastructure systems. The addition of lands to the Kemptville urban settlement area would need to occur through a Counties Official Plan Amendment process, supported by technical studies such as this land needs assessment, as well as additional servicing, transportation, and environmental analyses. These studies would also be accompanied by a comprehensive public consultation process.

The densities applied for future land needs for singles, semis and rowhouses is based on observed development recently completed.

Table 6: North Grenville - Land Needs Assessment

North Grenville	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	3,274	1,289	1,681	6,244
Rural Lands Outside of Settlement Areas	*624*	*0*	*0*	*624*
Intensification within Urban Settlement Areas	*125*	*375*	*749*	*1,249*
Greenfield Land within All Settlement Areas	*2,525*	*914*	*932*	*4,371*
Settlement Area Land Need (units)	2,525	914	932	4,371
Settlement Area Net Density Assumption	26	43	100	34
Settlement Area Land Need (net ha)	98.6	21.2	9.3	129.1
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	179.3	38.5	16.9	234.8

	Total Area (gross ha)
Residential Land Supply	52.5
Residential Land Need	234.8
Surplus/Deficit	(182.3)

Source: Hemson Consulting

ii. Edwardsburgh-Cardinal (EC)

Between 2025 and 2051, EC is forecast to accommodate 813 new housing units, primarily in the form of single and semi-detached dwellings. Of this demand, about 122 units are expected in rural areas and 163 units through urban intensification. The majority of growth—approximately 528 units—is anticipated to occur within urban greenfield areas, requiring an estimated 47.6 gross hectares of land.

EC is shown to have approximately 130.4 gross hectares of greenfield land, 89.0 in the urban settlement area of Cardinal and 41.4 dispersed throughout the rural settlements. This results in an apparent surplus of 82.8 hectares when compared to forecast needs. The Cardinal settlement area currently has land capacity for approximately 1,000 units based on an overall density of around 20 units per net hectare.

The substantial supply of designated and potentially developable lands in Edwardsburgh Cardinal is expected to provide a significant amount of lands in the near future capable of accommodating growth well beyond forecast requirements, offering flexibility to respond to future market opportunities and economic development initiatives.

Table 7: Edwardsburgh-Cardinal – Land Needs Assessment

Edwardsburgh-Cardinal	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	647	5	161	813
Rural Lands Outside of Settlement Areas	*122*	*0*	*0*	*122*
Intensification within Urban Settlement Areas	*5*	*5*	*153*	*163*
Greenfield Land within All Settlement Areas	*520*	*0*	*8*	*528*
Settlement Area Land Need (units)	520	0	8	528
Settlement Area Net Density Assumption	20	30	50	20
Settlement Area Land Need (net ha)	26.0	0.0	0.2	26.2
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	47.3	0.0	0.3	47.6

	Total Area (gross ha)
Residential Land Supply	130.4
Residential Land Need	47.6
Surplus/Deficit	82.8

Source: Hemson Consulting

iii. Leeds and the Thousand Islands (LTI)

Between 2025 and 2051, LTI is forecast to require approximately 520 new housing units, with about 260 units expected to be accommodated within urban greenfield areas in Landsdowne. This requires an estimated 23.4 gross hectares of land. While the municipality has a large overall supply of land—approximately 50.1 gross hectares of urban settlement area land and 109.2 gross hectares of rural settlement area land. In the urban area, there is a resulting in an apparent surplus of 26.7 hectares.

LTI currently has urban land capacity to accommodate approximately 560 units in Landsdowne. These units were derived based on the assumed density of 20 units per net hectare.

Table 8: Leeds and the Thousand Islands – Land Needs Assessment

Leeds and the Thousand Islands	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	510	5	5	520
Rural Lands Outside of Settlement Areas	*156*	*0*	*0*	*156*
Intensification within Urban Settlement Areas	*100*	*0*	*4*	*104*
Greenfield Land within All Settlement Areas	*254*	*5*	*1*	*260*
Settlement Area Land Need (units)	254	5	1	260
Settlement Area Net Density Assumption	20	30	50	20
Settlement Area Land Need (net ha)	12.7	0.2	0.0	12.9
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	23.1	0.3	0.0	23.4

	Total Area (gross ha)
Residential Land Supply	159.4
Residential Land Need	23.4
Surplus/Deficit	135.9

Source: Hemson Consulting

iv. Merrickville-Wolford (MW)

Between 2025 and 2051, MW is forecast to require approximately 320 new housing units, with about 160 units expected to be accommodated within the urban settlement area of Merrickville, requiring an estimated 12.7 gross hectares of land. In addition, 64 units are forecast to be developed through intensification, which brings the total unit development in Merrickville to 224 units. Merrickville has approximately 59.1 gross hectares of developable land, which provide a unit capacity of approximately 750 based on an overall density of 23 units per gross hectare. Through this analysis, Merrickville appears to have a surplus of designated lands of approximately 46.5 gross hectares.

Future development potential in Merrickville-Wolford is constrained by limited municipal water and wastewater servicing capacity, requiring careful management of growth, infrastructure investment, and consideration of servicing solutions to support additional residential and employment development over the planning horizon. The Village has advised they will be undertaking a Master Servicing Plan to examine their serving limitations. Accordingly, it is recommended that the Counties undertake a long-term growth management study for Merrickville-Wolford after the completion of a comprehensive master servicing plan, and as part of the next review of the Counties Official Plan. The study should examine the community’s long-term growth potential, servicing capacity, opportunities for intensification and settlement area expansion, and any associated policy changes required to support sustainable growth.

Table 9: Merrickville-Wolford - Land Needs Assessment

Merrickville-Wolford	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	213	47	60	320
Rural Lands Outside of Settlement Areas	*96*	*0*	*0*	*96*
Intensification within Urban Settlement Areas	*5*	*17*	*42*	*64*
Greenfield Land within All Settlement Areas	*112*	*30*	*18*	*160*
Settlement Area Land Need (units)	112	30	18	160
Settlement Area Net Density Assumption	20	30	50	23
Settlement Area Land Need (net ha)	5.6	1.0	0.4	7.0
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	10.2	1.8	0.7	12.7

	Total Area (gross ha)
Residential Land Supply	75.2
Residential Land Need	12.7
Surplus/Deficit	62.5

Source: Hemson Consulting

v. Westport

Between 2025 and 2051, Westport is forecast to develop approximately 236 new housing units which encompasses 185 single and semi detached, 25 row house units and 26 apartments. Westport as a municipality is an urban settlement and therefore will absorb all forecasted growth. The forecasted unit growth will, in all practical terms, build-out all the remaining developable land in the municipality.

Westport currently has approximately 17.7 gross hectare of residential land available for development and will require approximately 16.8 hectares of land to accommodate the forecast. As this leaves Westport with only 0.9 hectares of land remaining for any proposed development beyond the forecast horizon, it is prudent to continue to monitor the development of residential units as they occur. Ultimately, it is recommended that the Counties, in partnership with Westport and Rideau Lakes, undertake a servicing and growth management study prior to the next Counties Official Plan Update to examine long-term opportunities for accommodating growth in and around Westport. The study should evaluate opportunities for intensification, potential settlement area boundary expansions, and, where appropriate, the feasibility of inter-municipal servicing agreements and/or communal servicing solutions.

Table 10: Westport – Land Needs Assessment

Westport	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	185	25	26	236
Rural Lands Outside of Settlement Areas	*0*	*0*	*0*	*0*
Intensification within Urban Settlement Areas	*0*	*25*	*26*	*51*
Greenfield Land within All Settlement Areas	*185*	*0*	*(0)*	*185*
Settlement Area Land Need (units)	185	0	(0)	185
Settlement Area Net Density Assumption	20	n/a	n/a	20
Settlement Area Land Need (net ha)	9.3	0.0	(0.0)	9.2
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	16.8	0.0	(0.0)	16.8

	Total Area (gross ha)
Residential Land Supply	17.7
Residential Land Need	16.8
Surplus/Deficit	0.9

Source: Hemson Consulting

vi. Athens

Between 2025 and 2051, Athens is forecast to develop 144 new housing units, with the majority of this growth—about 101 units—expected to be accommodated within the rural settlement areas. Meeting this demand, it is estimated that Athens will require approximately 17.6 gross hectares of rural settlement area land over the planning period. Athens is also forecasted to develop 43 single and semi detached units in the rural area, representing a third of all units developed.

Athens currently has approximately 26.5 gross hectares of rural settlement area land. When compared to forecast needs, this results in a surplus of approximately 8.9 hectares. The total capacity of the rural settlements is currently 150 units at an overall density of 10 units per net hectare.

Table 11: Athens – Land Needs Assessment

Athens	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	139	0	5	144
Rural Lands Outside of Settlement Areas	*43*	*0*	*0*	*43*
Intensification within Urban Settlement Areas	*0*	*0*	*0*	*0*
Greenfield Land within All Settlement Areas	*96*	*0*	*5*	*101*
Settlement Area Land Need (units)	96	0	5	101
Settlement Area Net Density Assumption	10	n/a	50	10
Settlement Area Land Need (net ha)	9.6	0.0	0.1	9.7
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	17.4	0.0	0.2	17.6

	Total Area (gross ha)
Residential Land Supply	26.5
Residential Land Need	17.6
Surplus/Deficit	8.9

Source: Hemson Consulting

vii. Augusta

Between 2025 and 2051, Augusta is forecast to require approximately 1,282 new housing units, with about 321 units or 25% expected to be accommodated within the rural areas. The remaining 962 units will be developed throughout the rural settlement areas as well as the Riverview Heights Secondary Plan area (which is recommended to be redesignated as an urban settlement area). New development is forecast to contain a mix of built-forms including 472 single and semi detached, 177 rows and 313 apartments. These units are estimated to require 79.3 gross hectares of land. The municipality has approximately 159.5 gross hectares of designated land within the rural settlements, resulting in an apparent surplus of about 80.2 hectares when compared to forecast needs.

At 15 units per net hectare, the rural settlement areas in Augusta currently have capacity for approximately 1,315 units.

Table 12: Augusta – Land Needs Assessment

Augusta	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	792	177	313	1,282
Rural Lands Outside of Settlement Areas	*321*	*0*	*0*	*321*
Intensification within Urban Settlement Areas	*0*	*0*	*0*	*0*
Greenfield Land within All Settlement Areas	*472*	*177*	*313*	*962*
Settlement Area Land Need (units)	472	177	313	962
Settlement Area Net Density Assumption	15	30	50	22
Settlement Area Land Need (net ha)	31.4	5.9	6.3	43.6
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	57.2	10.7	11.4	79.3

	Total Area (gross ha)
Residential Land Supply	159.5
Residential Land Need	79.3
Surplus/Deficit	80.2

Source: Hemson Consulting

viii. Elizabethtown-Kitley (EK)

Between 2025 and 2051, EK is forecast to grow by approximately 475 new housing units, including units within the fully serviced special residential campus area. About 238 units (approximately 50%) are expected to be accommodated within rural areas outside of the rural settlements. EK is forecast to develop 238 units, predominately single and semi detached and apartments, within the boundaries of the rural settlement areas. These units will require an estimated 16.6 gross hectares. EK has approximately 33.8 gross hectares of land currently developable within the rural settlements, resulting in a surplus of about 17.2 hectares relative to forecast needs.

Table 13: Elizabethtown-Kitley – Land Needs Assessment

Elizabethtown-Kitley	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	330	5	140	475
Rural Lands Outside of Settlement Areas	*238*	*0*	*0*	*238*
Intensification within Urban Settlement Areas	*0*	*0*	*0*	*0*
Greenfield Land within All Settlement Areas	*93*	*5*	*140*	*238*
Settlement Area Land Need (units)	93	5	140	238
Settlement Area Net Density Assumption	15	30	50	26
Settlement Area Land Need (net ha)	6.2	0.2	2.8	9.1
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	11.2	0.3	5.1	16.6

	Total Area (gross ha)
Residential Land Supply	33.8
Residential Land Need	16.6
Surplus/Deficit	17.2

Source: Hemson Consulting

ix. Front of Yonge

Between 2025 and 2051, Front of Yonge is forecast to require approximately 65 new housing units, with about 33 units or 50% expected to be accommodated outside of the rural settlements and 33 inside. Front of Yonge has approximately 14.1 gross hectares of land in their rural settlements, resulting in an apparent surplus of about 8.2 hectares relative to forecast needs. It is noted that in future reviews of the land supply and land need in Front of Yonge, settlement area reconfiguration could be explored to promote and develop Mallorytown into a more complete community.

Front of Yonge's rural settlements have a current total capacity of 78 units based on an overall density of 10 units per net hectare.

Table 14: Front of Yonge – Land Needs Assessment

Front of Yonge	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	65	0	0	65
Rural Lands Outside of Settlement Areas	*33*	*0*	*0*	*33*
Intensification within Urban Settlement Areas	*0*	*0*	*0*	*0*
Greenfield Land within All Settlement Areas	*33*	*0*	*0*	*33*
Settlement Area Land Need (units)	33	0	0	33
Settlement Area Net Density Assumption	10	n/a	n/a	10
Settlement Area Land Need (net ha)	3.3	0.0	0.0	3.3
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	5.9	0.0	0.0	5.9

	Total Area (gross ha)
Residential Land Supply	14.1
Residential Land Need	5.9
Surplus/Deficit	8.2

Source: Hemson Consulting

x. Rideau Lakes

Between 2025 and 2051, Rideau Lakes is forecast to require approximately 565 new housing units, with a significant share of growth directed to the single and semi-detached form. Rideau Lakes will also see higher density forms in 80 row houses. Approximately 415 units are expected to be developed in the rural area and 150 units, including the higher density rowhouse form, will be developed in the rural settlements.

Rideau Lakes currently has approximately 56.4 gross hectares of residential land available for development in the rural settlements. This translates to an approximate total capacity of 635 units on 31 net hectares at an overall density of 20 units per net hectare.

Table 15: Rideau Lakes – Land Needs Assessment

Rideau Lakes	Singles and Semis	Rowhouses	Apartments	Total
Unit Demand (2025-2051)	485	80	0	565
Rural Lands Outside of Settlement Areas	*415*	*0*	*0*	*415*
Intensification within Urban Settlement Areas	*0*	*0*	*0*	*0*
Greenfield Land within All Settlement Areas	*70*	*80*	*0*	*150*
Settlement Area Land Need (units)	70	80	0	150
Settlement Area Net Density Assumption	15	30	n/a	20
Settlement Area Land Need (net ha)	4.6	2.7	0.0	7.3
Net to Gross Assumption				55%
Settlement Area Land Need (gross ha)	8.5	4.8	0.0	13.3

	Total Area (gross ha)
Residential Land Supply	56.4
Residential Land Need	13.3
Surplus/Deficit	43.1

Source: Hemson Consulting

D. EMPLOYMENT LAND NEEDS BY LOCAL MUNICIPALITY

The employment land needs assessment identifies the amount of employment land required to accommodate forecast job growth across Counties municipalities to 2051. Overall, the forecast indicates that employment land employment growth will be distributed across both urban and rural communities, with larger land requirements concentrated in municipalities that are expected to accommodate higher levels of job growth. The hierarchy of assigning employment land employment growth throughout the UCLG CD is the following:

- Counties Identified Regional and Local Employment Areas
- Separated Cities
- Counties Settlement Areas

This forecast has assumed that new job growth in employment areas will achieve a density of approximately 10 – 15 jobs per gross hectare. The Counties identified employment areas in Elizabethtown-Kitley, Edwardsburgh-Cardinal, North Grenville and Augusta have been estimated to achieve the higher end of the density range. Similar density assumptions have been assumed for the separated cities of Brockville and Prescott. While the lower end of the density range is assumed in the settlement areas of Leeds and the Thousand Islands, Rideau Lakes, Front of Yonge and Merrickville-Wolford.

The forecast assigns a growth of 3,160 to the UCLG for employment land employment. The methodology applied directs growth to municipalities that currently contain designated employment lands. For the member municipalities, this forecast is for 3,160 jobs or approximately 83% of the CD growth. Table 16 outlines the current vacant supply, the land needed to accommodate the forecast and number of jobs forecasted to 2051 for the Counties.

Table 16: Employment Land Required to Accommodate Growth Forecast

Municipality	Employment Land Forecast (jobs)	Supply Required (gross ha)	Employment Land Supply (gross ha)	Remaining Employment Land (gross ha)
Athens	0	0.0	0.0	0.0
Augusta	970	64.7	81.0	16.3
Edwardsburgh-Cardinal	660	43.9	54.8	11.0
Elizabethtown-Kitley	680	60.0	75.0	15.0
Front of Yonge	60	5.3	6.6	1.3
Leeds and the Thousand Islands	150	14.5	18.1	3.6
Merrickville-Wolford	70	6.4	8.0	1.6
North Grenville	190	13.1	16.4	3.3
Rideau Lakes	380	37.7	47.1	9.4
Westport	0	0.0	0.0	0.0
Counties Total	**3,160**	**245.5**	**307.0**	**61.5**

Source: Hemson Consulting

5. Growth Management Policy Recommendations

This section provides policy recommendations for managing residential (both urban and rural) and employment growth in the Counties. The recommendations are based on:

- the growth forecasts and land needs assessment prepared as part of this Growth Management Strategy;
- a review of the PPS 2024;
- a comparative review of growth management policies in other Ontario upper-tier municipalities (see Appendices C and D); and
- an assessment of local servicing, settlement structure, housing, and employment land conditions across the Counties.

A. Urban Settlement Area and Housing Policy Recommendations

The PPS 2024 identifies settlement areas as the primary location for accommodating population and employment growth and requires that the Counties and local municipalities to focus development in areas where infrastructure, public service facilities, and transportation systems can be provided efficiently and sustainably.

Serviced settlement areas are generally better positioned to accommodate growth because they already contain or are planned to contain municipal water and wastewater systems, transportation infrastructure, parks and community facilities, schools and emergency services, and a more diverse employment and commercial base. Concentrating development in these areas can help maximize the use of existing infrastructure investments while reducing the long-term costs associated with dispersed rural growth.

The forecasts prepared as part of this Growth Management Strategy were developed in accordance with this provincial policy direction and generally direct future population and housing growth toward urban settlement areas in communities with servicing capacity, available urban lands, and existing urban characteristics. As noted above, the analysis concluded that, outside of North Grenville, existing designated urban lands are generally sufficient to accommodate forecast growth to 2051.

Directing growth to serviced settlement areas also supports several broader growth management objectives identified throughout the report, including:

- promoting complete communities;
- supporting housing diversity and intensification;
- protecting agricultural and rural lands from fragmented development;
- reducing infrastructure and servicing costs; and
- improving the long-term financial sustainability of municipal infrastructure systems.

Given these objectives and the observations previously noted in this GMS, the following policy directions are recommended for consideration in the UCLG Official Plan.

1. **Direct Growth to Urban Settlement Areas** - Continue to prioritize residential and employment growth in serviced settlement areas where infrastructure and public service facilities are available or planned.

2. **Expand the Kemptville Settlement Area** – The land needs assessment prepared as part of this Growth Management Strategy indicates that the Municipality of North Grenville is expected to exhaust its current supply of designated urban land by the mid-2030s. Given the strong population and housing growth forecast for the municipality, particularly in and around Kemptville, additional urban land will be required to accommodate long-term growth to 2051. Consistent with PPS 2024 policy direction, any settlement area boundary expansion should occur in a logical and phased manner, with minimum density targets, and should be supported by appropriate infrastructure and public service facilities.

3. **Redesignate a Portion of Riverview Heights to an Urban Settlement Area** – The Riverview Heights Secondary Plan area should be redesignated as an urban settlement area based on its planned role in accommodating a significant share of future residential growth in the Township of Augusta. Between 2026 and 2051, Augusta is forecast to grow by approximately 1,310 new housing units, of which approximately 1,090 units are anticipated to be accommodated within rural settlement areas and the rural area. The Riverview Heights area is planned to accommodate a range of housing forms, including single and semi-detached dwellings, row housing, and apartments, consistent with a more urban development pattern. Redesignating the area as an urban settlement area, together with the establishment of a minimum density target in the Counties Official Plan, would better reflect the area's intended function, planned municipal servicing strategy, and anticipated built form.

4. **Review Excess Lands** - The land needs assessment indicates that the existing supply of designated urban land within the remaining local municipalities is sufficient, and in some cases exceeds, what is required to accommodate forecast growth to 2051 based on current assumptions regarding density, intensification, and servicing capacity. Accordingly, no new urban land designations are required at this time within the other local municipalities.

   Where local municipalities have a significant supply of excess designated lands beyond the 2051 planning horizon, the Counties Official Plan should consider identifying such lands as long-term or post-2051 development areas to provide greater clarity regarding the intended phasing and timing of future growth.

5. **Undertake Long-Term GMS Studies for Westport and Merrickville-Wolford** - It is recommended that the Counties, in partnership with the Village of Westport and the Township of Rideau Lakes, undertake a servicing and growth management study prior to the next Counties Official Plan Update to examine long-term opportunities for accommodating growth in and around Westport. The study should evaluate opportunities for intensification, potential settlement area boundary expansions, and, where appropriate, the feasibility of inter-municipal servicing agreements and/or communal servicing solutions.

   It is further recommended that the Counties undertake a long-term growth management study for Merrickville-Wolford as part of the next review of the Counties Official Plan. Given the importance of servicing considerations to future growth opportunities in the community, this study should be initiated only after the completion of a comprehensive master servicing plan. The study should examine the community's long-term growth potential, servicing capacity, opportunities for intensification and settlement area expansion, and any associated policy changes required to support sustainable growth.

6. **Support Complete Communities** – The PPS 2024 requires the Counties and local municipalities to support the development of complete communities.[6] Accordingly, it is recommended that policy language be added to the Counties' Official Plan directing local municipal Official Plans to encourage compact development patterns, including

[6] The PPS 2024 defines complete communities as "places such as mixed-use neighbourhoods or other areas within cities, towns, and settlement areas that offer and support opportunities for equitable access to many necessities for daily living for people of all ages and abilities, including an appropriate mix of jobs, a full range of housing, transportation options, public service facilities, local stores and services. Complete communities are inclusive and may take different shapes and forms appropriate to their contexts to meet the diverse needs of their populations."

intensification and redevelopment, as well as integrated land uses that support walkability, active transportation, access to community services, and the creation of complete communities.

7. **Encourage Housing Diversity and Intensification** – The PPS 2024 identifies intensification and redevelopment as key mechanisms for achieving complete communities by accommodating growth within existing built-up areas while supporting efficient infrastructure use, active transportation, and a broader range of housing options. The Counties Official Plan should introduce policies requiring local municipalities to encourage a broader mix of housing types, including apartments and higher-density forms to, among other things:

    - improve housing affordability
    - support aging populations
    - use serviced lands more efficiently.

B. SETTLEMENT AREA BOUNDARY EXPANSION/REALLOCATION POLICY RECOMMENDATIONS

The land needs assessment indicates that many settlement areas have a theoretical surplus of designated development land relative to forecast needs to 2051. However, the existence of a theoretical surplus does not necessarily mean that all such lands are developable, serviceable, or likely to be brought to market within the planning horizon. As a result, the following policy directions are recommended to guide the consideration of settlement area boundary expansion and land reconfiguration requests:

1. **Permit Settlement Area Boundary Reconfigurations** – Introduce policies permitting the limited reconfiguration of settlement area boundaries, provided that: (a) such adjustments are minor in scale; and (b) they do not result in any net increase in the total developable area of the affected settlement area(s).

2. **Introduce Policies for Private Requests for Settlement Area Boundary Expansion:**

    2.1 Establish Expansion Criteria - The Counties should develop and adopt a clear set of evaluation criteria for considering settlement area boundary expansion requests, which, under the PPS 2024, may now be initiated at any time. Establishing clear criteria would provide greater transparency and consistency in decision-making, while also assisting applicants in preparing complete and appropriately scoped proposals.

2.2 Require a Land Needs Assessment – Introduce policies requiring that any privately initiated request to expand a settlement area boundary be supported by a comprehensive land needs assessment. The assessment should evaluate both local municipal requirements and broader Counties-wide land needs to ensure consistency with overall growth management objectives and the PPS 2024.

2.3 Close Coordination with Local Municipality – Ensure that the evaluation of settlement area boundary expansion requests is undertaken in close coordination with the affected local municipality, particularly with respect to the availability and capacity of municipal infrastructure and servicing for potential new urban lands.

C. EMPLOYMENT AREA POLICY RECOMMENDATIONS

The PPS 2024 requires that the Counties and local municipalities actively protect and preserve employment areas for long-term economic activity and future job growth. Employment areas are intended primarily for uses such as manufacturing, warehousing, logistics, research and development, and related office and retail uses that support those functions.[7]

The PPS 2024 emphasizes that employment lands—particularly those located near highways, rail corridors, and other major goods movement infrastructure—are strategic economic assets and should be safeguarded from incompatible development. Municipalities are expected to ensure that appropriate infrastructure is available to support both existing and future employment uses.

To maintain the long-term viability of employment areas, the PPS 2024 generally prohibits residential, institutional, and unrelated commercial uses within these areas, and requires municipalities to address compatibility issues between employment lands and nearby sensitive uses.

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[7] The PPS 2024 defines employment areas as "those areas designated in an official plan for clusters of business and economic activities including manufacturing, research and development in connection with manufacturing, warehousing, goods movement, associated retail and office, and ancillary facilities. An employment area also includes areas of land described by subsection 1(1.1) of the *Planning Act*. Uses that are excluded from employment areas are institutional and commercial, including retail and office not associated with the primary employment use listed above."

The PPS also establishes strict criteria for converting employment lands to non-employment uses. Municipalities may only remove lands from employment areas where it can be demonstrated that:

- the lands are not needed for long-term employment purposes;
- the conversion will not undermine the viability of the broader employment area;
- infrastructure and servicing are available; and
- sufficient employment land supply will remain to accommodate future employment growth.

Overall, the PPS 2024 treats employment areas as strategically important lands that are critical to long-term economic competitiveness, goods movement, and municipal employment growth. Given this policy framework, the Counties should consider the following policy recommendations:

1. **Strengthen Employment Lands Protection** – Given the PPS 2024 direction noted above, the Counties should update its Official Plan policies to:

    i. Refine permitted uses (excluding residential, institutional and stand-alone commercial uses as per PPS 2024);
    ii. Protect Employment Areas from incompatible uses;
    iii. Promote intensification of Employment Areas;
    iv. Ensure supply of employment lands.

2. **Develop Employment Area Conversion Criteria** - The Counties should consider developing and adopting a clear set of evaluation criteria for considering employment area conversion requests. As with settlement area boundary requests, establishing clear criteria would provide greater transparency and consistency in decision-making, while also assisting applicants in preparing complete and appropriately scoped proposals.

3. **Redesignate a Portion of the Employment Area in Kemptville** - Lands within Kemptville that are currently designated as Regionally Significant Employment Areas but have developed, or are planned to develop, for commercial uses were excluded from the employment land inventory. It is recommended that these lands also be removed from the Regionally Significant Employment Area designation, as the associated policy framework is intended to protect employment uses and may unnecessarily constrain the continued development and redevelopment of commercial uses on these lands.

D. RURAL AREA DEVELOPMENT POLICY RECOMMENDATIONS

A significant proportion of development in Leeds and Grenville continues to occur within rural settlement areas and the broader rural area, accounting for approximately 25% to 50% of new residential construction in recent years. Rural development also plays an important role in shaping the character and function of communities such as Athens, Augusta, Elizabethtown-Kitley, Front of Yonge, Leeds and the Thousand Islands, Merrickville-Wolford, and Rideau Lakes.

Between 2022 and 2024, approximately 140 to 190 dwelling units were created annually through rural severances and rural subdivisions, representing roughly one-third of all residential lot creation within the Counties during that period. This level of rural development highlights the importance of carefully managing growth in rural areas in a manner that protects rural character, supports agricultural and environmental objectives, and does not undermine planned growth and infrastructure investment within designated settlement areas. Planning for rural development in UCLG is further complicated by a substantial supply of vacant rural residential lots that exist in many parts of the Counties.

Rural development occurs in a variety of forms, including residential lot severances in the rural area, estate lot subdivisions, waterfront and recreational residential development, and larger rural subdivisions. These forms of development can have varying impacts on agricultural land preservation, infrastructure requirements, environmental protection, and the overall pattern of growth. The scale of rural subdivisions also varies considerably, ranging from small clusters of lots to developments containing more than 80 lots.

At the same time, differences in rural development policies and approval practices among local municipalities can create a number of planning challenges, including:

- inefficient and costly provision of infrastructure and municipal services including, for example, ambulance and protection (fire and police) services, where service requirements are typically driven by the need to maintain incident response times;
- erosion of rural character and fragmentation of the agricultural land base;
- potential environmental impacts associated with increased population, traffic, and reliance on private wells and septic systems; and
- the undermining of planned growth and investment in designated settlement areas.

In light of these considerations, the PPS 2024 direction regarding settlement-area focused growth, and the best practice review set out in the appendices to this report, the following policy directions are recommended for the UCLG Official Plan update.

1. **Prevent Landlocked Parcels** – The rationale for prohibiting the creation of landlocked parcels is grounded in sound land use planning, public safety, and infrastructure management considerations. Parcels without direct frontage on a public road can create long-term access issues for emergency services, utility servicing, maintenance, and future development approvals. They may also lead to disputes regarding easements, maintenance obligations, and legal access rights. A review of official plans from other Ontario upper-tier municipalities found that many counties explicitly prohibit the creation of landlocked parcels as a standard rural planning practice (see Appendix C).

2. **Maintain Rural Character, Road Function, and Focus Growth in Rural Settlement Areas** – The Counties should adopt policies that prohibit the creation of new lots through severance where the resulting lot would not have direct access to a public road or condominium road unless exceptional circumstances exist and both legal and practical access can be clearly demonstrated (e.g. infill development along an existing private road or lots intended for conservation purposes). For the purposes of these policies, direct access should mean that the lot can be reasonably accessed by emergency and municipal services via access roads or common roads.[8]

   These policies should apply consistently across both rural and agricultural areas and would help standardize access requirements among local municipalities within the Counties, while providing limited flexibility for site-specific exceptions where appropriate. Such an approach would promote safe and accessible development patterns and improve the long-term serviceability of rural properties (see Table 17).

   This recommendation is also consistent with broader growth management objectives identified in this report, including avoiding inefficient development patterns and ensuring that rural development can be safely and effectively serviced.

   2.1 Ribbon Development Definition/Guidance – A review of official plans from other Ontario upper-tier municipalities found that many jurisdictions include policies restricting strip or ribbon development in rural areas to prevent inefficient

[8] *Road Access Act R.S.O. 1990*, Chapter R.34.

development patterns, avoid incremental urbanization along rural roads, and protect opportunities for future settlement area expansion.

Accordingly, the Counties' Official Plan should introduce policies discouraging or restricting strip or ribbon development along rural roads between settlement areas. This would help avoid inefficient development patterns and prevent incremental urbanization of rural corridors. Most local municipal official plans already prohibit or discourage such development (see Table 17) but do not have guidance for implementation. Building on the existing policy framework, the following definition for the purposes of this Counties policy should be considered:

> *"Strip or ribbon development* means a pattern of rural residential development characterized by a concentration of non-farm lots created along an existing public roadway outside of settlement areas, resulting in a linear sequence of residential lots that may undermine rural land use objectives, contribute to inefficient infrastructure expansion and service provision, or limit the future expansion of nearby settlement areas."

Applications for severances may be refused unless it can be demonstrated that the proposal will not contribute to a pattern of strip or ribbon development. For the purposes of evaluating applications for consent or subdivision, strip or ribbon development may be considered to occur where:

- more than three non-farm residential lots exist or are proposed within 200 metres of either side of the proposed lot line, measured along the frontage of one side of a public road; or
- the proposed severance or subdivision would contribute to the incremental extension of residential development along a rural road between settlement areas.

Local municipalities could elect to have higher standards in their policies.

2.2 Introduce Caps on Rural Severances and Subdivisions – As noted above, rural lot creation is a significant component of residential growth in Leeds and Grenville and therefore warrants a more coordinated policy framework. The Counties should consider establishing limits on the number of lots that may be created:

- from a single original parcel through consents; and
- within individual rural area residential subdivision applications.

The rationale for introducing caps on rural severances and subdivision sizes is to manage the cumulative impacts of dispersed rural residential growth, prevent the gradual urbanization of rural areas, and encourage development in settlement areas. Although individual severances may appear modest in isolation, their cumulative effect can significantly increase demand for roads, emergency services, school transportation, and other public services in areas not intended for urban development.

The comparative policy review found that many Ontario municipalities establish limits on the number of lots created through severances or rural subdivisions (see Table 17). Introducing caps would therefore bring the Counties more in line with common upper-tier planning practice in Ontario while helping preserve rural character, reduce fragmented and scattered development patterns, limit infrastructure and servicing pressures in rural areas; and reinforce the PPS 2024 direction that growth should primarily occur within settlement areas.

2.3 **Restrict Rural Subdivisions Near Settlement Areas** - Several upper-tier municipalities in Ontario discourage or prohibit rural subdivisions in close proximity to settlement areas to preserve opportunities for future urban expansion and avoid fragmented development patterns. In light of the PPS 2024 emphasis on directing growth to settlement areas, a buffer of approximately one kilometre from settlement boundaries should be considered. As such, the Counties' Official Plan should discourage or restrict rural subdivisions located near settlement area boundaries to avoid interfering with future settlement expansion or creating inefficient development patterns. A buffer of 1 kilometre from settlement boundaries should be considered.

2.4 **Address Water Quality and Quantity Considerations Through Upper-Tier Minimum Standards for Rural Lots** – The Counties should consider introducing baseline upper-tier standards for rural lot creation, including:

- minimum lot sizes (e.g. 0.8 hectare, in keeping with the UCLG Groundwater Study and D-Series Guidelines);
- density criteria (e.g. 5 lots within 5 hectares, consistent with approach used in Augusta); and
- frontage-to-depth ratios.

Local municipalities should be allowed to retain the ability to impose more restrictive requirements provided the associated official plan requires hydrological assessments.

The rationale for establishing baseline upper-tier standards for rural lot creation is to ensure a consistent minimum level of environmental protection, servicing feasibility, and orderly development across the Counties, while still allowing local municipalities flexibility to adopt more restrictive standards where appropriate. The review of other Ontario official plans found that several upper-tier municipalities establish minimum lot size and frontage requirements directly within their upper-tier official plans. Such standards help ensure adequate lot area for private wells and septic systems, reduce risks to groundwater quality and quantity, avoid the creation of long, narrow parcels that contribute to strip development, and support more coordinated growth management outcomes across municipalities. Lot configuration/dimensions are specifically identified for consideration in lot creation under the *Planning Act*.[9]

The recommendation also reflects the servicing realities of rural development. Much rural growth in Leeds and Grenville relies on private water and wastewater systems, and concentrated residential development in such areas can create environmental and infrastructure concerns if not carefully managed.

3. **Support Rural Settlement Area Growth** – While growth should continue to be directed primarily to settlement areas with existing servicing and development capacity, there may be opportunities to strengthen the role of selected rural settlement areas as complete and sustainable communities. The following recommendations are intended to support appropriately scaled growth in strategic locations while maintaining the rural character of the Counties and ensuring that development occurs in an environmentally and fiscally responsible manner.

   3.1 Consider Communal Servicing Locations – The Counties should consider identifying a limited number of strategic locations where private communal water and wastewater systems could support appropriately scaled growth within rural settlement areas, particularly in communities with tourism, recreational, or amenity-based development potential. Private communal servicing may provide opportunities

[9] *Planning Act*, s.51 (24).

to accommodate targeted growth where full municipal servicing is unavailable or not financially feasible.

The PPS 2024 provides greater flexibility for the use of communal servicing systems than previous provincial policy frameworks, particularly within rural settlement areas. This creates opportunities for carefully managed growth in communities where conventional municipal servicing may not be practical in the foreseeable future.

This recommendation is not intended to support widespread rural expansion or large-scale unserviced development. Rather, it recognizes that there may be specific circumstances where communal servicing could:

- support tourism-related economic development;
- accommodate retirement or amenity-based housing;
- improve servicing efficiency and municipal autonomy compared to individual private systems;
- facilitate compact development patterns in existing settlement areas; and
- protect environmental health and minimize safety risks.

3.2 **Strengthen Rural Settlement Areas through Incentives** – Some rural settlement areas are better positioned than others to evolve as complete communities due to their existing mix of services, larger population base, strategic location, or capacity to accommodate additional growth. These communities may also be appropriate candidates for future growth through settlement area boundary reallocations.

To help direct growth to these locations, the Counties should work collaboratively with local municipalities to identify and implement incentives that encourage residential, commercial, and mixed-use development. Potential measures could include planning and approval process improvements, coordinated infrastructure investment, community improvement initiatives, and other financial or policy tools designed to support growth in priority settlement areas and reinforce their role as service and activity centres within the broader rural area.

Table 17 – Comparison of Selected Rural Growth Management Policies in Local OPs

	Landlocked Parcels	Strip development	Minimum Lot Size	Density Caps (lots)	Subdivisions near Settlements
Athens	Not permitted	Discouraged	0.4 ha	Consent: 4 Sub: 25	No policy
Augusta	Not permitted	Discouraged	0.8 ha	Consent: 2 Sub: No policy	No policy
Edwardsburgh/ Cardinal	Not permitted	Not permitted	0.4 ha	Consent: 3 Sub: No policy	No policy
Elizabethtown-Kitley	Not permitted	Not permitted	0.4 ha	Consent: 2 Sub: Prohibited	Allowed in rural area with residential designation
Front of Yonge	Not permitted	Discouraged	0.4 ha	Consent: 4 Sub: 25	No policy
Leeds and the Thousand Islands	Not permitted	Not permitted	No policy	Consent: 3 Sub: 20 per phase	No policy
Merrickville–Wolford	Not permitted	Not permitted	0.4 ha	Consent: 3 Sub: 25-30 per phase	No policy
North Grenville	Not permitted	Not permitted	1.0 ha	Consent: 2 Sub: Prohibited	All rural subdivisions prohibited No policy

	Landlocked Parcels	Strip development	Minimum Lot Size	Density Caps (lots)	Subdivisions near Settlements
Rideau Lakes	Not permitted	Not permitted	0.4 ha	Consent: 4 Sub: 40 first phase; 20 (ad. phases)	No policy
Westport	Not permitted	No policy	0.4 ha	Consent: 4 Sub: No policy	No policy

E. MONITORING AND IMPLEMENTING POLICY RECOMMENDATIONS

With respect to monitoring and implementation policies in the Counties Official Plan, the Counties should:

1. **Continue Monitoring Rural Development** - Maintain the Counties' current practice of monitoring and reporting on rural severances and subdivisions. Regular monitoring will allow the Counties to:

   - evaluate the effectiveness of policy changes, and
   - support evidence-based updates during future Official Plan reviews.

2. **Expand Settlement Area Growth Monitoring and Land Budgeting** - Establish an ongoing Counties-wide monitoring program to track:

   - development activity
   - land absorption rates
   - intensification rates
   - remaining urban land supply

3. **Commit to 5-year Forecast Updates and Land Needs Review**

Maintaining an up-to-date land budget and monitoring program for settlement areas will also support future decisions regarding settlement area boundary expansions and infrastructure planning under the PPS 2024.

F. OTHER POLICY RECOMMENDATIONS

It is recommended that Council adopt the growth forecasts contained in this report as the basis for future planning and growth management activities within Leeds and Grenville. These forecasts would replace Table 2.1 (Population Forecasts and Allocations to Local Municipalities) and Table 2.2 (Total Place of Work Employment Forecasts and Allocations to Local Municipalities) of the Official Plan.

It is further recommended that the forecasts be reviewed and updated every five years, and within one year following the release of final Census of Canada data by Statistics Canada. Accordingly, the next forecast update should be initiated in 2032.

Finally, considering the diversity of community structure and the economic base within Leeds and Grenville, the Counties should:

1. **Reflect Local Municipal Growth Contexts** - Maintain flexibility within Counties-level policy to reflect the diverse growth conditions across municipalities, including:

    - stronger intensification and housing demand in North Grenville;
    - local employment area protection and economic development priorities in Elizabethtown-Kitley;
    - tourism and retirement-oriented development in Westport; and
    - rural character preservation in slower-growing municipalities.

2. **Support Agricultural Economic Development** - Encourage policies that support a diversified agricultural economy, including on-farm diversification and value-added agricultural activities, consistent with PPS 2024.

3. **Initiate a Rural Growth Management Strategy** – focused on how the Counties and local municipalities can better coordinate initiatives on rural development through community improvement plans, rural settlement area growth targets, and economic development.

4. **Align Official Plan Policies with the PPS, 2024** - Finally, the Counties' Official Plan should be updated to ensure full consistency with the PPS 2024, thereby maintaining a legally and technically defensible framework for managing growth and guiding land use

planning decisions. The Counties should update terminology, definitions, and policy language to reflect the PPS 2024, including key terms such as “settlement area,” “complete communities,” “rural area,” “rural lands,” “prime agricultural area,” and “prime agricultural land.”

In addition to ensuring conformity with current provincial policy direction, these updates will improve clarity and consistency throughout the Official Plan, reduce the potential for interpretation disputes, and strengthen the Counties’ ability to defend planning decisions and Official Plan policies before the Ontario Land Tribunal.

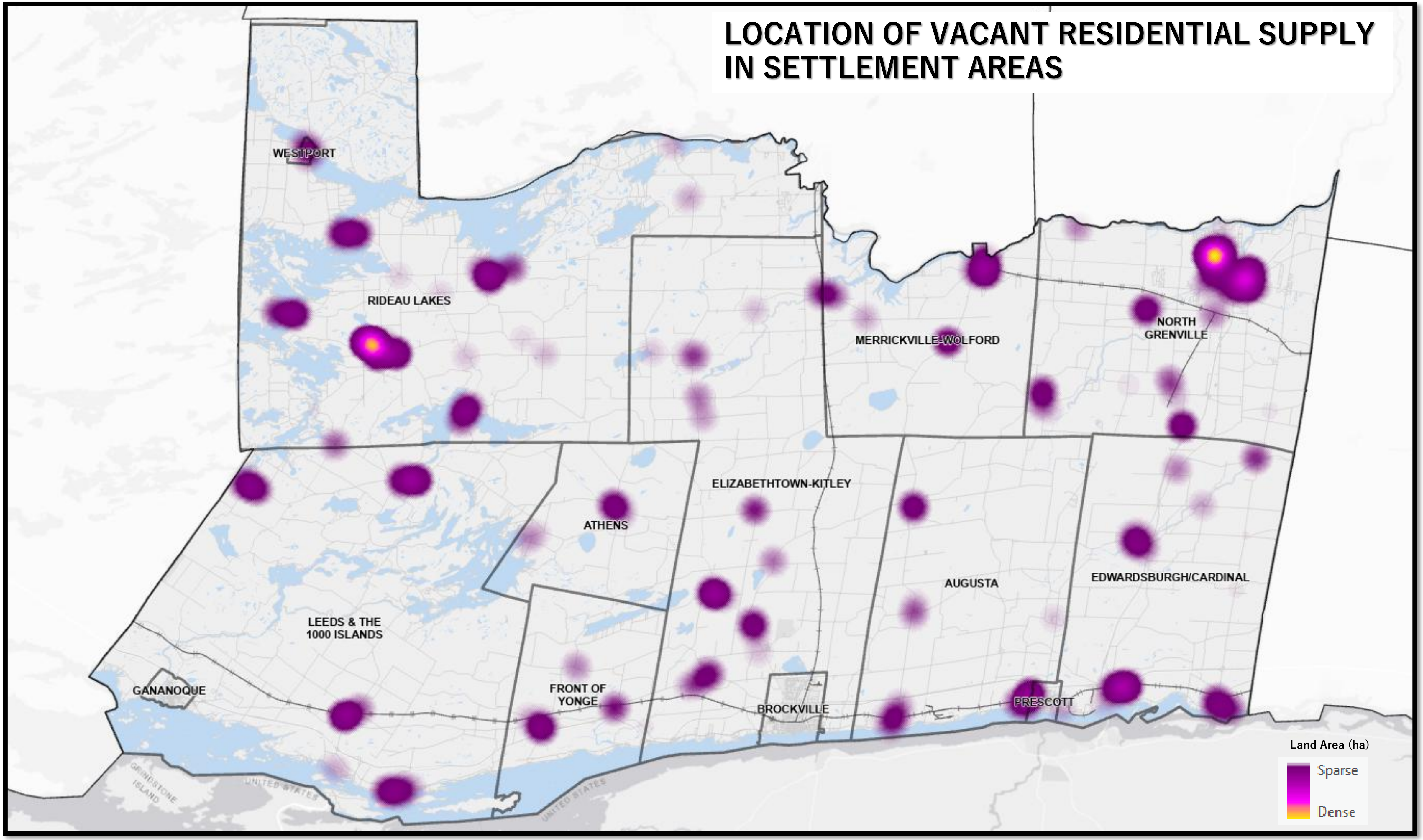
APPENDIX A

LAND SUPPLY MAPS

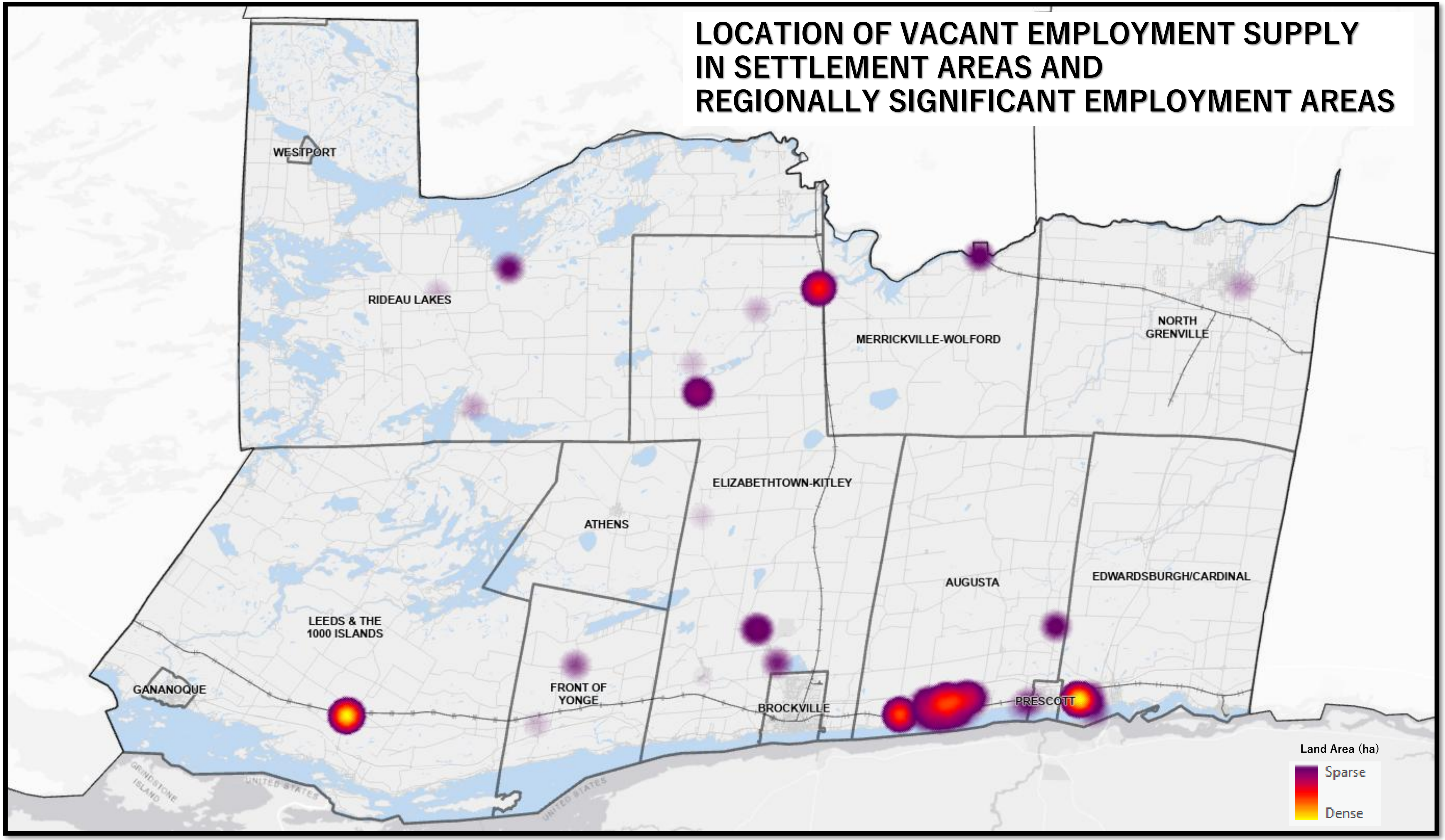
LAND SUPPLY MAPS

Appendix A provides concept maps showing the location of the residential and employment area land supply across the Counties.

LOCATION OF VACANT RESIDENTIAL SUPPLY IN SETTLEMENT AREAS



LOCATION OF VACANT EMPLOYMENT SUPPLY IN SETTLEMENT AREAS AND REGIONALLY SIGNIFICANT EMPLOYMENT AREAS



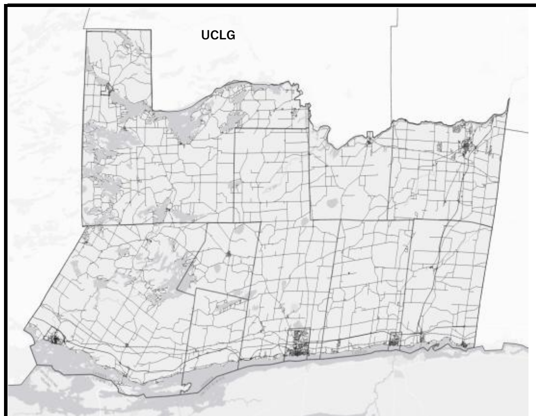
Appendix B

Detailed Forecast Results

Detailed Forecast Results

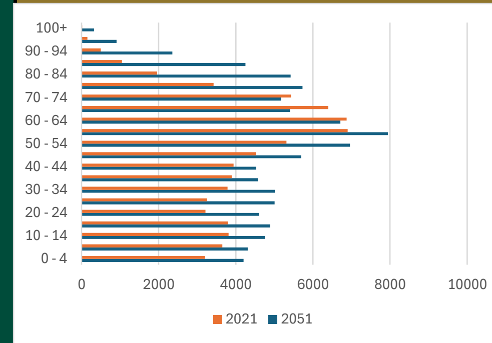
Appendix B sets out detailed forecast results for the Counties and each local municipality. The results are set out in tables that provide:

- population forecast 2016 to 2051;
- housing by type 2016 to 2051;
- population age structure 2021 and 2051;
- employment forecast 2016 to 2051; and
- employment by type 2016 to 2051.



United Counties of Leeds and Grenville

Population Age Structure 2021 and 2051



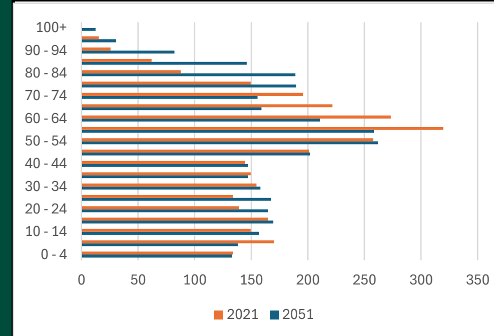
FORECAST RESULTS

Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2016	71,250				26,395	495	1,185	28,075	
2021	75,090	3,840	1.1%	100.0%	27,545	550	1,445	29,540	1,465
2026	78,940	3,850	1.0%	100.0%	29,040	890	1,885	31,815	2,275
2031	82,030	3,090	0.8%	100.0%	30,050	1,190	2,190	33,430	1,615
2036	85,990	3,960	0.9%	100.0%	31,360	1,520	2,625	35,505	2,075
2041	90,080	4,090	0.9%	100.0%	32,720	1,860	3,100	37,680	2,175
2046	94,340	4,260	0.9%	100.0%	34,065	2,200	3,620	39,885	2,205
2051	98,770	4,430	0.9%	100.0%	35,560	2,545	4,190	42,295	2,410
2021-51 Growth		**23,680**	**0.9%**	**100.0%**	**8,015**	**1,995**	**2,745**	**12,755**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	18,840				0	8,740	6,450	3,650	18,840
2021	21,870	3,030	3.0%	100.0%	0	10,760	7,590	3,520	21,870
2026	23,540	1,670	1.5%	100.0%	0	11,950	7,890	3,700	23,540
2031	24,610	1,070	0.9%	100.0%	0	12,650	8,210	3,750	24,610
2036	25,990	1,380	1.1%	100.0%	0	13,510	8,650	3,830	25,990
2041	27,410	1,420	1.1%	100.0%	0	14,290	9,230	3,890	27,410
2046	28,920	1,510	1.1%	100.0%	0	14,990	9,930	4,000	28,920
2051	30,480	1,560	1.1%	100.0%	0	15,650	10,750	4,080	30,480
2021-51 Growth		**8,610**	**1.1%**	**100.0%**	**-**	**4,890**	**3,160**	**560**	**8,610**

Athens

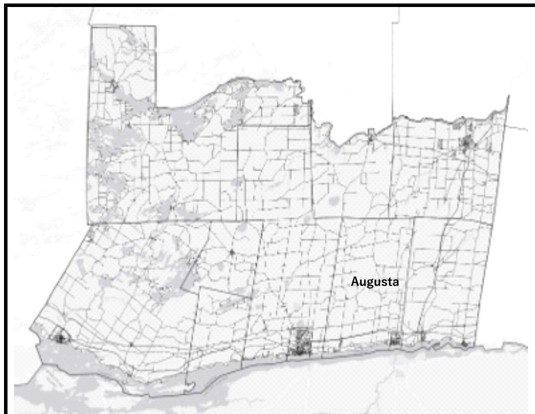
Population Age Structure
2021 and 2051



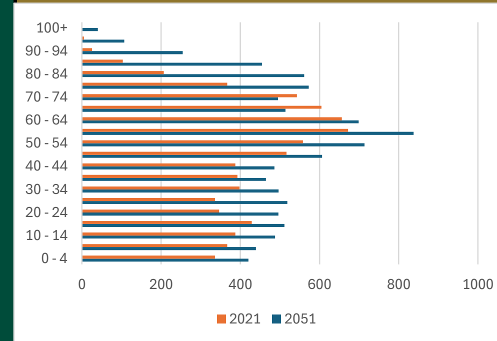
FORECAST RESULTS

Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Rows	Apartments	Total	Growth
2016	3,090				1,150	10	25	1,185	
2021	3,150	60	0.4%	1.6%	1,180	15	20	1,215	30
2026	3,150	0	0.0%	0.0%	1,210	15	25	1,250	35
2031	3,180	30	0.2%	1.0%	1,230	15	20	1,265	15
2036	3,200	20	0.1%	0.5%	1,250	15	25	1,290	25
2041	3,220	20	0.1%	0.5%	1,270	15	20	1,305	15
2046	3,250	30	0.2%	0.7%	1,290	15	25	1,330	25
2051	3,280	30	0.2%	0.7%	1,340	15	25	1,380	50
2021-51 Growth		**130**	**0.1%**	**0.5%**	**160**	**-**	**5**	**165**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Pop-Related	Emp. Land	Rural	Total
2016	830				0	360	300	170	830
2021	1,020	190	4.2%	6.3%	0	380	420	220	1,020
2026	1,120	100	1.9%	6.0%	0	480	420	220	1,120
2031	1,130	10	0.2%	0.9%	0	490	420	220	1,130
2036	1,130	0	0.0%	0.0%	0	490	420	220	1,130
2041	1,140	10	0.2%	0.7%	0	490	430	220	1,140
2046	1,140	0	0.0%	0.0%	0	500	420	220	1,140
2051	1,150	10	0.2%	0.6%	0	500	420	230	1,150
2021-51 Growth		**130**	**0.4%**	**1.5%**	**-**	**120**	**-**	**10**	**130**



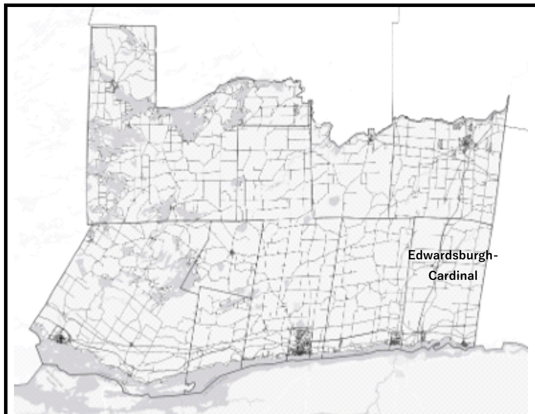
Augusta



FORECAST RESULTS

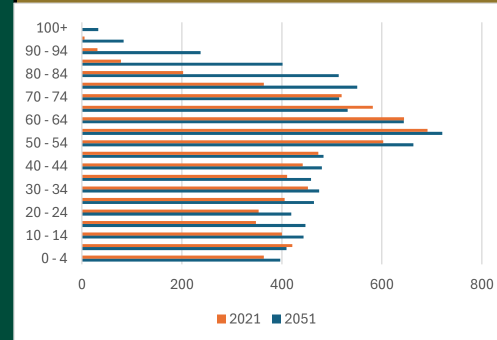
Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Rows	Apartments	Total	Growth
2016	7,530				2,850	25	35	2,910	
2021	7,640	110	0.3%	2.9%	2,875	25	50	2,950	40
2026	7,780	140	0.4%	3.6%	2,920	60	150	3,130	180
2031	8,140	360	0.9%	11.7%	3,050	90	180	3,320	190
2036	8,600	460	1.1%	11.6%	3,210	120	230	3,560	240
2041	9,090	490	1.1%	12.0%	3,380	150	290	3,820	260
2046	9,620	530	1.1%	12.4%	3,570	180	350	4,100	280
2051	10,180	560	1.1%	12.6%	3,770	210	430	4,410	310
2021-51 Growth		**2,540**	**1.0%**	**10.7%**	**895**	**185**	**380**	**1,460**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Pop-Related	Emp. Land	Rural	Total
2016	1,150				0	470	510	170	1,150
2021	1,460	310	4.9%	10.2%	0	610	480	370	1,460
2026	1,630	170	2.2%	10.2%	0	670	580	380	1,630
2031	1,820	190	2.2%	17.8%	0	750	680	390	1,820
2036	2,060	240	2.5%	17.4%	0	850	810	400	2,060
2041	2,280	220	2.1%	15.5%	0	930	940	410	2,280
2046	2,600	320	2.7%	21.2%	0	1,020	1,160	420	2,600
2051	2,980	380	2.8%	24.4%	0	1,100	1,450	430	2,980
2021-51 Growth		**1,520**	**2.4%**	**17.7%**	**-**	**490**	**970**	**60**	**1,520**



Edwardsburgh-Cardinal

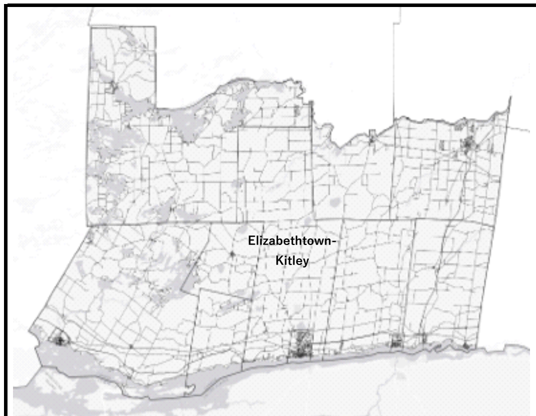
Population Age Structure
2021 and 2051



FORECAST RESULTS

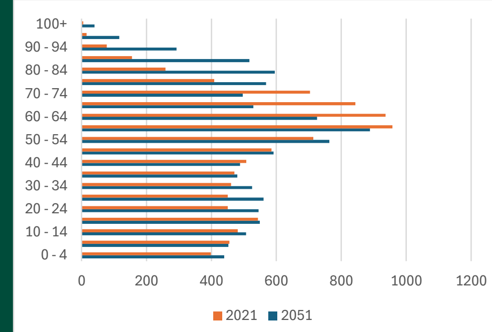
Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Housing By Type Rows	Housing By Type Apartments	Housing By Type Total	Housing By Type Growth
2016	7,270				2,670	40	205	2,915	
2021	7,790	520	1.4%	13.5%	2,730	45	365	3,140	225
2026	7,990	200	0.5%	5.2%	2,850	50	370	3,270	130
2031	8,160	170	0.4%	5.5%	2,930	50	390	3,370	100
2036	8,450	290	0.7%	7.3%	3,060	50	420	3,530	160
2041	8,740	290	0.7%	7.1%	3,190	50	450	3,690	160
2046	9,050	310	0.7%	7.3%	3,320	50	490	3,860	170
2051	9,370	320	0.7%	7.2%	3,470	50	530	4,050	190
2021-51 Growth		**1,580**	**0.6%**	**6.7%**	**740**	**5**	**165**	**910**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Employment By Type Pop-Related	Employment By Type Emp. Land	Employment By Type Rural	Employment By Type Total
2016	2,060				0	540	1,070	450	2,060
2021	2,800	740	6.3%	24.4%	0	1,040	1,330	430	2,800
2026	2,930	130	0.9%	7.8%	0	1,100	1,390	440	2,930
2031	3,040	110	0.7%	10.3%	0	1,140	1,460	440	3,040
2036	3,200	160	1.0%	11.6%	0	1,200	1,550	450	3,200
2041	3,380	180	1.1%	12.7%	0	1,260	1,670	450	3,380
2046	3,590	210	1.2%	13.9%	0	1,310	1,820	460	3,590
2051	3,810	220	1.2%	14.1%	0	1,360	1,990	460	3,810
2021-51 Growth		**1,010**	**1.0%**	**11.7%**	**-**	**320**	**660**	**30**	**1,010**



Elizabethtown-Kitley

Population Age Structure
2021 and 2051



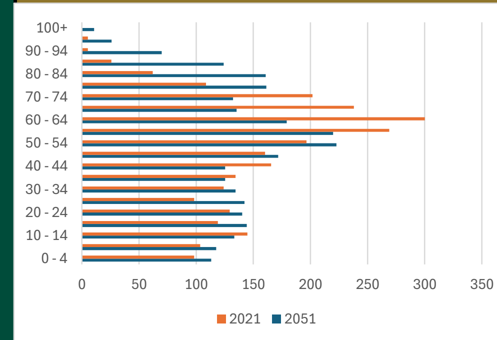
FORECAST RESULTS

Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Rows	Apartments	Total	Growth
2016	9,870				3,650	30	70	3,750	
2021	9,880	10	0.0%	0.3%	3,680	30	90	3,800	50
2026	10,030	150	0.3%	3.9%	3,700	30	160	3,890	90
2031	10,110	80	0.2%	2.6%	3,720	30	230	3,980	90
2036	10,230	120	0.2%	3.0%	3,820	30	230	4,080	100
2041	10,360	130	0.3%	3.2%	3,920	30	230	4,180	100
2046	10,510	150	0.3%	3.5%	4,020	30	230	4,280	100
2051	10,670	160	0.3%	3.6%	4,120	30	230	4,380	100
2021-51 Growth		**790**	**0.3%**	**3.3%**	**440**	**-**	**140**	**580**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Pop-Related	Emp. Land	Rural	Total
2016	3,320				0	1,430	1,170	720	3,320
2021	2,770	(550)	-3.6%	-18.2%	0	1,220	1,050	500	2,770
2026	2,890	120	0.9%	7.2%	0	1,260	1,120	510	2,890
2031	2,970	80	0.5%	7.5%	0	1,280	1,180	510	2,970
2036	3,090	120	0.8%	8.7%	0	1,300	1,280	510	3,090
2041	3,240	150	1.0%	10.6%	0	1,330	1,400	510	3,240
2046	3,440	200	1.2%	13.2%	0	1,360	1,560	520	3,440
2051	3,630	190	1.1%	12.2%	0	1,380	1,730	520	3,630
2021-51 Growth		**860**	**0.9%**	**10.0%**	**-**	**160**	**680**	**20**	**860**

Front of Yonge

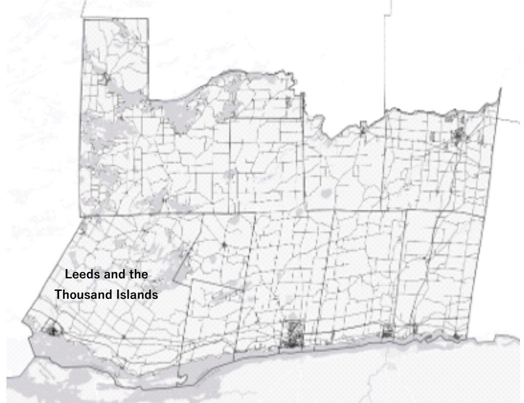
Population Age Structure
2021 and 2051



FORECAST RESULTS

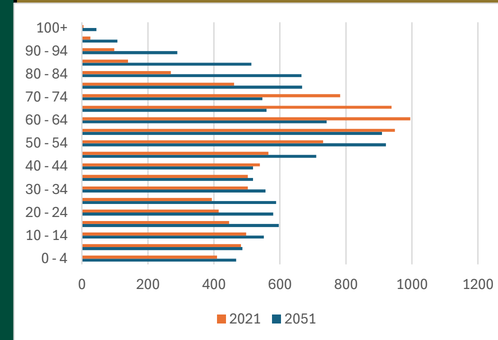
Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Rows	Apartments	Total	Growth
2016	2,650				1,020	0	35	1,055	
2021	2,690	40	0.3%	1.0%	1,040	0	35	1,075	20
2026	2,720	30	0.2%	0.8%	1,060	0	35	1,095	20
2031	2,730	10	0.1%	0.3%	1,080	0	35	1,115	20
2036	2,740	10	0.1%	0.3%	1,100	0	35	1,135	20
2041	2,750	10	0.1%	0.2%	1,120	0	35	1,155	20
2046	2,770	20	0.1%	0.5%	1,130	0	35	1,165	10
2051	2,790	20	0.1%	0.5%	1,140	0	35	1,175	10
2021-51 Growth		**100**	**0.1%**	**0.4%**	**100**	**-**	**-**	**100**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Pop-Related	Emp. Land	Rural	Total
2016	630				0	250	260	120	630
2021	800	170	4.9%	5.6%	0	260	390	150	800
2026	810	10	0.2%	0.6%	0	270	390	150	810
2031	830	20	0.5%	1.9%	0	270	410	150	830
2036	850	20	0.5%	1.4%	0	270	430	150	850
2041	850	0	0.0%	0.0%	0	270	430	150	850
2046	870	20	0.5%	1.3%	0	270	450	150	870
2051	890	20	0.5%	1.3%	0	280	450	160	890
2021-51 Growth		**90**	**0.4%**	**1.0%**	**-**	**20**	**60**	**10**	**90**



Leeds and the Thousand Islands

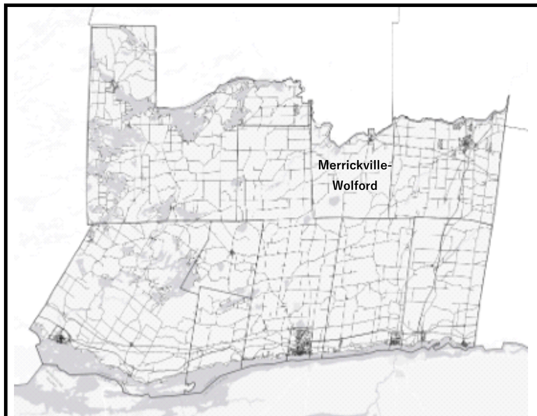
Population Age Structure
2021 and 2051



FORECAST RESULTS

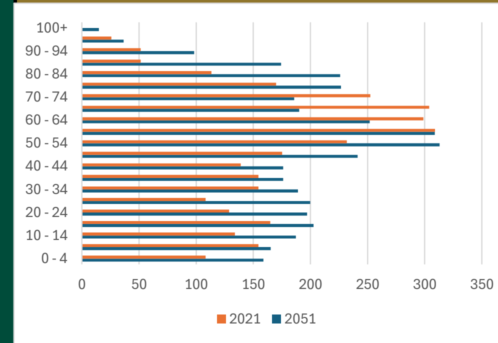
Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2016	9,700				3,760	30	80	3,870	
2021	10,150	450	0.9%	11.7%	3,910	10	80	4,000	130
2026	10,420	270	0.5%	7.0%	4,100	10	80	4,190	190
2031	10,530	110	0.2%	3.6%	4,180	10	80	4,270	80
2036	10,750	220	0.4%	5.6%	4,270	10	80	4,360	90
2041	10,980	230	0.4%	5.6%	4,360	10	80	4,450	90
2046	11,250	270	0.5%	6.3%	4,470	10	80	4,560	110
2051	11,540	290	0.5%	6.5%	4,590	10	80	4,680	120
2021-51 Growth		**1,390**	**0.4%**	**5.9%**	**680**	**-**	**-**	**680**	

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	2,380				0	1,050	810	520	2,380
2021	2,170	(210)	-1.8%	-6.9%	0	1,050	700	420	2,170
2026	2,270	100	0.9%	6.0%	0	1,130	710	430	2,270
2031	2,310	40	0.3%	3.7%	0	1,150	730	430	2,310
2036	2,390	80	0.7%	5.8%	0	1,200	750	440	2,390
2041	2,460	70	0.6%	4.9%	0	1,250	770	440	2,460
2046	2,550	90	0.7%	6.0%	0	1,290	810	450	2,550
2051	2,630	80	0.6%	5.1%	0	1,330	850	450	2,630
2021-51 Growth		**460**	**0.6%**	**5.3%**	**-**	**280**	**150**	**30**	**460**



Merrickville-Wolford

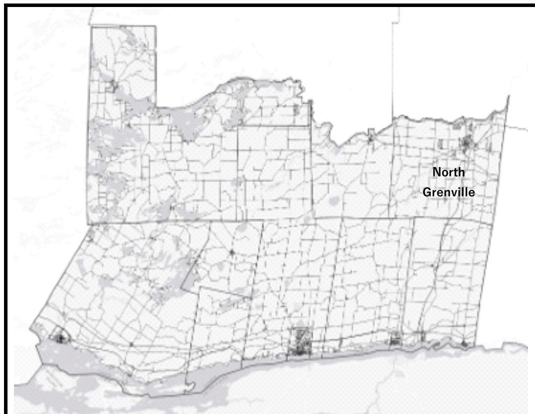
Population Age Structure
2021 and 2051



FORECAST RESULTS

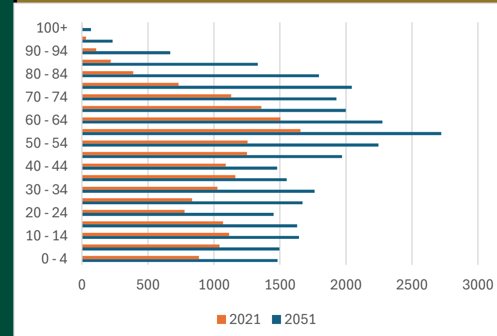
Year	Population			Share of	Housing By Type				
	Total	Growth	Annual Rate	Growth	Single/Semi	Rows	Apartments	Total	Growth
2016	3,130				1,125	0	105	1,230	
2021	3,230	100	0.6%	2.6%	1,190	0	100	1,290	60
2026	3,420	190	1.1%	4.9%	1,250	30	100	1,380	90
2031	3,520	100	0.6%	3.2%	1,300	30	100	1,430	50
2036	3,620	100	0.6%	2.5%	1,330	50	120	1,500	70
2041	3,720	100	0.5%	2.4%	1,380	60	130	1,570	70
2046	3,820	100	0.5%	2.3%	1,415	70	145	1,630	60
2051	3,920	100	0.5%	2.3%	1,450	80	160	1,690	60
2021-51 Growth		**690**	**0.6%**	**2.9%**	**260**	**80**	**60**	**400**	**-**

Year	Employment			Share of	Employment By Type				
	Total	Growth	Annual Rate	Growth	Major Office	Pop-Related	Emp. Land	Rural	Total
2016	900				0	390	270	240	900
2021	1,200	300	5.9%	9.9%	0	520	360	320	1,200
2026	1,240	40	0.7%	2.4%	0	550	360	330	1,240
2031	1,270	30	0.5%	2.8%	0	580	360	330	1,270
2036	1,300	30	0.5%	2.2%	0	610	360	330	1,300
2041	1,400	100	1.5%	7.0%	0	640	430	330	1,400
2046	1,430	30	0.4%	2.0%	0	660	430	340	1,430
2051	1,450	20	0.3%	1.3%	0	680	430	340	1,450
2021-51 Growth		**250**	**0.6%**	**2.9%**	**-**	**160**	**70**	**20**	**250**



North Grenville

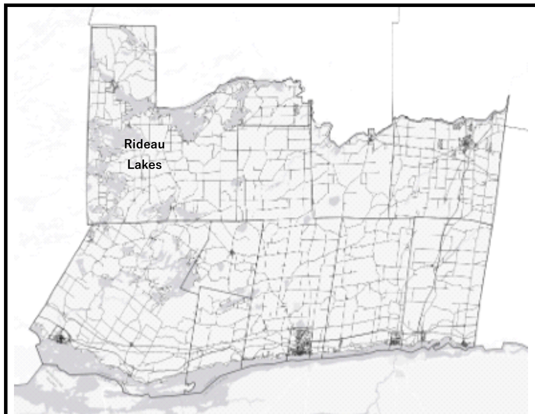
Population Age Structure
2021 and 2051



FORECAST RESULTS

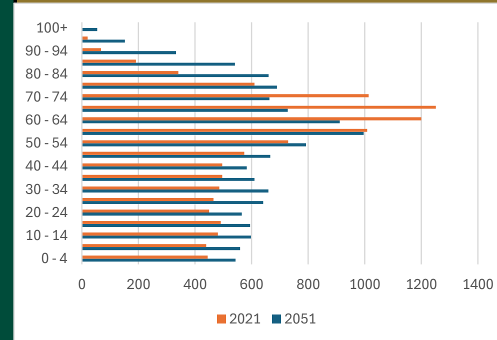
Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Rows	Apartments	Total	Growth
2016	16,890				5,670	310	460	6,440	
2021	18,650	1,760	2.0%	45.8%	6,150	370	520	7,040	600
2026	20,340	1,690	1.8%	43.9%	6,580	640	740	7,960	920
2031	22,500	2,160	2.0%	69.9%	7,130	890	930	8,950	990
2036	25,150	2,650	2.3%	66.9%	7,810	1,150	1,260	10,220	1,270
2041	27,880	2,730	2.1%	66.7%	8,500	1,430	1,640	11,570	1,350
2046	30,610	2,730	1.9%	64.1%	9,170	1,710	2,040	12,920	1,350
2051	33,460	2,850	1.8%	64.3%	9,910	1,990	2,470	14,370	1,450
2021-51 Growth		**14,810**	**2.0%**	**62.5%**	**3,760**	**1,620**	**1,950**	**7,330**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Pop-Related	Emp. Land	Rural	Total
2016	5,170				0	3,090	1,310	770	5,170
2021	7,290	2,120	7.1%	70.0%	0	4,470	2,120	700	7,290
2026	7,870	580	1.5%	34.7%	0	4,950	2,140	780	7,870
2031	8,420	550	1.4%	51.4%	0	5,440	2,160	820	8,420
2036	9,070	650	1.5%	47.1%	0	6,020	2,180	870	9,070
2041	9,670	600	1.3%	42.3%	0	6,530	2,220	920	9,670
2046	10,210	540	1.1%	35.8%	0	6,980	2,260	970	10,210
2051	10,730	520	1.0%	33.3%	0	7,400	2,310	1,020	10,730
2021-51 Growth		**3,440**	**1.3%**	**40.0%**	**-**	**2,930**	**190**	**320**	**3,440**



Rideau Lakes

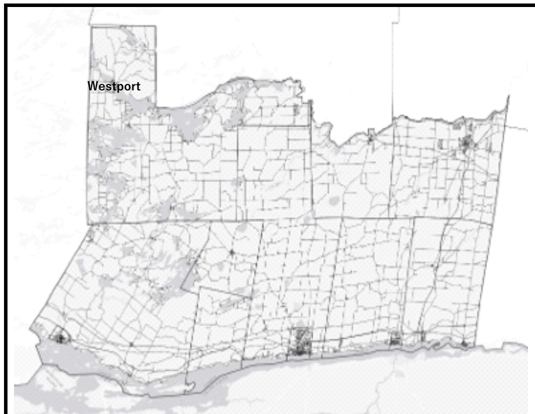
Population Age Structure 2021 and 2051



FORECAST RESULTS

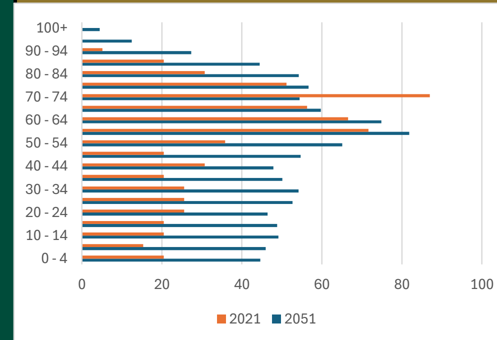
Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Housing By Type Rows	Housing By Type Apartments	Housing By Type Total	Housing By Type Growth
2016	10,520				4,305	35	80	4,420	
2021	11,260	740	1.4%	19.3%	4,550	30	120	4,700	280
2026	12,310	1,050	1.8%	27.3%	5,080	30	160	5,270	570
2031	12,350	40	0.1%	1.3%	5,090	30	160	5,280	10
2036	12,370	20	0.0%	0.5%	5,120	30	160	5,310	30
2041	12,410	40	0.1%	1.0%	5,160	50	160	5,370	60
2046	12,480	70	0.1%	1.6%	5,200	70	160	5,430	60
2051	12,540	60	0.1%	1.4%	5,280	110	140	5,530	100
2021-51 Growth		**1,280**	**0.4%**	**5.4%**	**730**	**80**	**20**	**830**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Employment By Type Pop-Related	Employment By Type Emp. Land	Employment By Type Rural	Employment By Type Total
2016	2,150				0	910	750	490	2,150
2021	2,100	(50)	-0.5%	-1.7%	0	950	740	410	2,100
2026	2,500	400	3.5%	24.0%	0	1,260	780	460	2,500
2031	2,540	40	0.3%	3.7%	0	1,270	810	460	2,540
2036	2,620	80	0.6%	5.8%	0	1,290	870	460	2,620
2041	2,710	90	0.7%	6.3%	0	1,310	940	460	2,710
2046	2,810	100	0.7%	6.6%	0	1,320	1,020	470	2,810
2051	2,930	120	0.8%	7.7%	0	1,340	1,120	470	2,930
2021-51 Growth		**830**	**1.1%**	**9.6%**	**-**	**390**	**380**	**60**	**830**



Westport

Population Age Structure 2021 and 2051



FORECAST RESULTS

Year	Population Total	Population Growth	Population Annual Rate	Share of Growth	Housing By Type Single/Semi	Housing By Type Rows	Housing By Type Apartments	Housing By Type Total	Housing By Type Growth
2016	600				195	15	90	300	
2021	650	50	1.6%	1.3%	240	25	65	330	30
2026	780	130	3.7%	3.4%	290	25	65	380	50
2031	830	50	1.3%	1.6%	340	45	65	450	70
2036	880	50	1.2%	1.3%	390	65	65	520	70
2041	930	50	1.1%	1.2%	440	65	65	570	50
2046	980	50	1.1%	1.2%	480	65	65	610	40
2051	1,030	50	1.0%	1.1%	490	50	90	630	20
2021-51 Growth		**380**	**1.5%**	**1.6%**	**250**	**25**	**25**	**300**	

Year	Employment Total	Employment Growth	Employment Annual Rate	Share of Growth	Employment By Type Major Office	Employment By Type Pop-Related	Employment By Type Emp. Land	Employment By Type Rural	Employment By Type Total
2016	250				0	250	0	0	250
2021	260	10	0.8%	0.3%	0	260	0	0	260
2026	280	20	1.5%	1.2%	0	280	0	0	280
2031	280	0	0.0%	0.0%	0	280	0	0	280
2036	280	0	0.0%	0.0%	0	280	0	0	280
2041	280	0	0.0%	0.0%	0	280	0	0	280
2046	280	0	0.0%	0.0%	0	280	0	0	280
2051	280	0	0.0%	0.0%	0	280	0	0	280
2021-51 Growth		**20**	**0.2%**	**0.2%**	**-**	**20**	**-**	**-**	**20**

Appendix C

Policy Research Memos

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MEMORANDUM

To: Cherie Mills and Elaine Mallory, The United Counties of Leeds and Grenville (UCLG)

From: Stefan Krzeczunowicz

Date: February 25, 2026

Re: Policy Review and Recommendations Regarding Urban Settlement Areas and Employment Areas

This memorandum provides a review of the Provincial Planning Statement, 2024 (PPS 2024) and its implications for settlement area planning, employment land protection, and growth management in the United Counties of Leeds and Grenville. It summarizes key Provincial policy requirements, evaluates their relevance in the context of the Counties' long-term population, housing, and employment forecasts, and presents recommended Official Plan policy updates to ensure consistency with the PPS while supporting sustainable, infrastructure-efficient, and economically competitive growth to 2051.

A companion memorandum addresses policy recommendations for growth management in rural areas of Leeds and Grenville.

A. SETTLEMENT AREAS ARE PRIMARY LOCATION FOR GROWTH UNDER PROVINCIAL PLANNING STATEMENT 2024

The PPS 2024 establishes settlement areas as the primary focus for accommodating population and employment growth. Municipalities are required to direct development to settlement areas to ensure that growth occurs in locations where infrastructure, public service facilities, and transportation systems can be efficiently provided. Within settlement areas, municipalities are further encouraged to focus growth in strategic growth areas, including major transit station areas, where higher densities and transit-supportive development can be accommodated. This approach promotes efficient urban structure, supports transit viability, and optimizes existing infrastructure investments.

In keeping with this policy direction, the forecasts prepared as part of this Growth Management Strategy direct growth to communities that have servicing capacity, available lands, and urban characteristics.

i. Land Use Patterns in Settlement Areas

Under the PPS 2024, land use planning within settlement areas must promote efficient and integrated development patterns. Municipalities are required to plan for densities and a mix of land uses that make efficient use of land and resources while maximizing the use of existing and planned infrastructure such as water, wastewater, roads, transit, and community facilities. Settlement area land use patterns must support active transportation, including walking and cycling, and should be designed to support public transit where it is available or planned. In addition, planning must consider the efficient movement of goods, ensuring that freight transportation needs are accommodated, particularly in employment areas and along key transportation corridors.

ii. Settlement Areas as Complete Communities

The PPS 2024 also requires municipalities to support intensification and redevelopment within existing built-up areas. Intensification is a key mechanism for achieving "complete communities" by accommodating growth within existing urban areas rather than through outward expansion. This includes planning for a range and mix of housing options to meet diverse needs, including different housing types, densities, and affordability levels. Supporting intensification also requires municipalities to plan for and invest in infrastructure and public service facilities necessary to accommodate increased population and employment densities within built-up areas.

To ensure that intensification occurs in a measurable and deliberate manner, municipalities are required to establish and implement minimum intensification and redevelopment targets within built-up areas. These targets must reflect local conditions, including the municipality's size, growth rate, infrastructure capacity, and development patterns.

iii. Density Targets for Settlement Areas

In addition to intensification targets, municipalities are encouraged to establish density targets for designated growth areas, such as greenfield areas planned for future urban development. These density targets should also reflect local conditions and planning objectives.[1]

[1] The PPS 2024 specifically encourages "large and fast-growing municipalities" to plan for densities of at least 50 residents and jobs combined per gross hectare in designated growth areas. However, Leeds and Grenville is not currently designated as one of these municipalities.

iv. Phasing

Finally, municipalities are encouraged to establish phasing policies for development within designated growth areas (i.e. greenfield areas). Phasing policies help ensure that development occurs in a logical and orderly sequence and that infrastructure and public service facilities are available when needed. This prevents premature development in areas where servicing is not yet available and helps municipalities manage infrastructure costs, coordinate capital planning, and ensure financially sustainable growth patterns.

v. Settlement Area Boundary Expansion

One of the most significant changes in the PPS 2024 is increased flexibility for settlement area boundary expansions. Municipalities may now identify new settlement areas, or expand existing settlement area boundaries at any time, not only during comprehensive Official Plan reviews. In identifying boundary expansion locations, municipalities must consider:

- the need for additional land to accommodate growth;
- the availability and capacity of infrastructure and public service facilities;
- the protection of agricultural lands and natural heritage; and
- whether the expansion provides for the phased progression of urban development.

B. EMPLOYMENT AREAS UNDER THE PPS 2024

The PPS 2024 requires municipalities to actively promote economic development, competitiveness, and long-term employment growth through appropriate land use planning. Municipalities must ensure that sufficient land is available to accommodate a broad range and mix of employment, institutional, and mixed-use activities needed to support both current and future economic needs. This includes planning for a diverse economic base by maintaining an adequate supply of suitable employment sites capable of accommodating various economic sectors, including industrial, manufacturing, logistics, office, and institutional uses. Municipalities must also consider the needs of existing businesses and ensure that future growth opportunities are not constrained by a lack of available land or infrastructure.

Municipalities are required to identify and protect strategic employment sites that are important for economic development and investment attraction. This includes monitoring the supply, availability, and suitability of employment lands, particularly sites that are market-ready or capable of being developed in the near term. Municipalities are also expected to identify and address barriers that may prevent investment or employment growth, such as infrastructure limitations, land use conflicts, or inadequate land supply.

The PPS 2024 also encourages intensification and more efficient use of employment lands, including compact and mixed-use development where appropriate. This includes supporting the intensification of existing employment areas and encouraging compatible employment uses in strategic growth areas and mixed-use areas, particularly where frequent transit service is available. Certain industrial and small-scale warehousing uses that are compatible with surrounding land uses may be permitted in mixed-use or transit-accessible areas outside of traditional employment areas, helping integrate employment opportunities into complete communities.

To support transit-oriented development and efficient urban structure, major office and institutional uses should be directed to major transit station areas and other strategic growth areas with frequent transit service. This helps concentrate high-density employment uses in accessible locations, supports transit viability, and promotes more sustainable development patterns.

The PPS 2024 also emphasizes the importance of protecting employment areas from land use conflicts. Development proposed near employment areas must avoid or minimize potential negative impacts on the continued operation and economic viability of employment uses. This includes mitigating conflicts such as noise, traffic, or environmental impacts that could restrict industrial operations or discourage investment.

i. Planning for Employment Areas

Under the PPS 2024 municipalities are required to designate, protect, and preserve employment areas within settlement areas for long-term employment uses. These areas play a critical role in supporting economic growth and providing locations for key economic activities such as manufacturing, warehousing, goods movement, and research and development. Municipalities must ensure that adequate infrastructure, including transportation, water, wastewater, and utilities, is available to support both existing and future employment uses.

Employment areas located near major transportation infrastructure, such as highways, rail corridors, ports, or goods movement corridors, must be specifically protected because these locations are essential for industrial and logistics uses that depend on efficient goods movement. These lands are considered strategically important and must be preserved for employment uses that require such locations.

To ensure that employment areas remain viable and available for their intended purpose, municipalities must restrict the introduction of non-employment uses within employment areas. Residential uses, institutional uses such as schools or hospitals, and unrelated commercial uses are generally prohibited, as these uses can create land use conflicts and undermine the long-term viability of employment operations. Retail and office uses may only be permitted if they are directly associated with and support the primary employment uses in the area. Sensitive land uses, such as residential development, are also prohibited unless they are clearly ancillary to employment functions.

Municipalities are also required to ensure compatibility between employment areas and adjacent land uses. This includes providing appropriate transitions between employment areas and surrounding non-employment uses to prevent land use conflicts and protect the continued operation of employment activities.

Municipalities must regularly review and assess employment area designations to ensure they remain appropriate and sufficient to meet long-term employment needs. This includes ensuring that employment lands are protected from incompatible uses and remain viable locations for economic activity.

ii. Removal of Lands from Employment Areas

The PPS 2024 establishes strict criteria for removing lands from employment area designations. Municipalities may only redesignate employment lands for non-employment uses where it has been clearly demonstrated that the lands are no longer needed for employment purposes over the long term. Before removing lands from employment areas, municipalities must demonstrate that:

- there is a legitimate need to convert the land to another use;
- the removal will not negatively affect the viability or function of the overall employment area;
- access to major goods movement infrastructure will be maintained;
- adequate infrastructure and public service facilities are available to support the proposed new uses; and

- the municipality will continue to have sufficient employment land to accommodate forecast employment growth over the planning horizon.

These requirements ensure that employment lands are not prematurely or unnecessarily converted to other uses, which could undermine long-term economic growth and reduce the municipality's ability to accommodate future employment.

C. GENERAL OFFICIAL PLAN POLICY DIRECTION FOR LEEDS AND GRENVILLE

Leeds and Grenville local municipalities are anticipated to experience relatively high population growth over the 2026 to 2051 planning horizon, with growth especially high in municipalities with urban settlement areas such as North Grenville. Housing growth is expected to outpace population growth, reflecting smaller household sizes, an aging population, and continued demand for housing in amenity-rich and commuter-accessible locations. Employment levels are forecast to remain relatively stable.

Growth in population, housing, and employment will be unevenly distributed across local municipalities, influenced by factors such as proximity to larger urban labour markets, access to natural amenities, land availability, and servicing capacity and constraints. As noted above, and consistent with the PPS 2024, the majority of growth is directed to municipalities with urban serviced settlement areas.

The following policy recommendations are provided for consideration by the Counties in light of the PPS 2024 policy direction set out above:

- Based on the forecast growth and the results of the land needs assessment, the existing supply of designated urban land is sufficient to accommodate anticipated development over the planning horizon in all municipalities, with the exception of North Grenville. Outside North Grenville, no additional urban land designations are required at this time.

- North Grenville will require a settlement area boundary expansion, probably around Kemptville settlement area.

- It is recommended that the Counties, in consultation with local municipalities, implement ongoing monitoring of development activity and land absorption, and maintain a Counties-wide land budget to ensure an appropriate and sustainable land supply over the longer term.

- Residential growth should be primarily directed to settlement areas where full municipal services are available. The development potential of designated lands will depend on the availability and capacity of municipal water, wastewater, and stormwater infrastructure, as well as access to parks and community services.

- To support long-term housing affordability and respond to the needs of an aging population, local municipalities should encourage a broader range of housing types, including apartment-style and other higher-density forms, even within smaller settlement areas where appropriate. Consideration should also be given to compact development patterns and the creation of complete communities when evaluating future development proposals.

- Local municipalities, through their local Official Plans, will be responsible for distributing growth within their settlement areas in a manner consistent with PPS 2024 and Counties' OP policy direction. The diversity of geographic conditions, settlement patterns, housing markets, and growth drivers across Leeds and Grenville highlights the importance of maintaining flexibility in both Counties-level and local planning policies to support Provincial objectives while addressing local priorities.

    - In North Grenville, strong housing demand driven by commuters may warrant a greater emphasis on intensification, compact development, and efficient use of serviced lands.

    - In Elizabethtown-Kitley, economic development objectives may prioritize the protection, preservation, and strategic expansion of employment lands.

    - In Westport, policies that support tourism development and retirement-oriented housing may help attract amenity-driven and older-aged population growth.

    - In some local municipalities, attracting new growth and investment will be a key policy objective, while in others, preserving rural character and managing growth at a modest pace will remain a priority.

    - Across the Counties, policies that support a diversified and resilient agricultural economy should be considered, consistent with the broader range of permitted uses under the PPS 2024. Expanded opportunities for on-farm diversification and value-added activities may enhance the long-term economic viability of agricultural operations.

D. SPECIFIC POLICY DIRECTION

Policy Reference in Current OP	Recommended Change	Rationale
s. 2.0 Preamble	Italicize and define "complete communities" per PPS 2024	Consistency with PPS 2024
Schedule A	Reconfigure urban settlement area boundary in North Grenville to reflect land needs to 2051	Pursuant to PPS 2024 2.1.3
"Settlement area" definition	Reword to reflect PPS 2024	Consistency with PPS 2024
Policy 2.2	Replace "total population of 75,960 persons and 16,760 jobs to 2031" with "total population of 98,500 persons and 30,700 jobs to 2051"	Based on Hemson report
Policy 2.2	Reword paragraphs 2 and 3 to reflect the higher growth prospects for the Counties Replace figures in Tables 2.1 (Population Forecasts and Allocations to Local Municipalities) and 2.2 (Total Place of Work Employment Forecasts and Allocations to Local Municipalities)	Based on Hemson report
2.3.1 g) i), 2.3.2 d), and 2.5	Modify to limit settlement area boundary expansion according to PPS criteria and Counties settlement	Consistency with PPS 2024 policy 2.3.2

	area boundary expansion criteria (forthcoming)	
Section 2 Definitions	Align defined terms in Section 2 with PPS 2024 definitions	
2.5.1	Reword to align with PPS 2024 requirements for settlement area boundary expansion (see policy 2.3.2)	
2.5.1.1	Consider removal of this section	
2.5.2	Establish clear criteria for urban and rural settlement area boundary adjustments	
2.6.1	Revise definitions of employment area. Introduce policy encouraging the promotion of intensification on existing employment areas in local OPs.	Consistent with PPS 2024 as noted above.
2.6.2	Revise employment land conversion criteria	Consistent with PPS 2024 policies as noted above.
2.7.1	Update to reflect PPS housing policy 2.2	

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MEMORANDUM

To: Cherie Mills and Elaine Mallory, The United Counties of Leeds and Grenville (UCLG)

From: Jack Campbell and Stefan Krzeczunowicz

Date: February 9, 2026

Re: Policy Review and Recommendations Regarding Rural Consents and Subdivisions

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Although most upper-tier municipalities in Ontario direct growth to designated settlement areas, opportunities for limited residential development typically remain in other land use designations, including in rural areas. One form of development that has emerged in rural areas of many counties is the "country lot estate". These are subdivisions with densities higher than what is typical for rural areas, generally located outside the boundaries of settlement areas.

Because areas outside settlement areas usually have limited municipal servicing, these developments often rely partly or entirely on private services. Given this reliance—and the fact that concentrated residential pockets can be inconsistent with rural land use objectives—the creation of new rural lots should be carefully regulated to ensure responsible and sustainable development.

This memorandum reviews how the UCLG's Official Plan regulates the creation of new lots in rural areas and compares those policies with selected official plans from other jurisdictions in Ontario.

A companion memorandum addresses policy recommendations for growth management in urban settlement areas and employment areas of Leeds and Grenville.

A. COUNTIES' OFFICIAL PLAN GENERALLY LEAVES PLANNING FOR RURAL AREAS TO LOCAL OFFICIAL PLANS

The current rules governing rural severances and subdivisions are set out in Sections 3.3 *Rural Lands*, 7.6.2.6 *Plans of Subdivision and Condominium*, and 7.6.3.2 *Consent* of the UCLG Official Plan. Collectively, these sections provide direction to local municipalities on how to establish policies in their own official plans related to rural uses, including promoting limited residential development (Policy 3.3.1 a)) on individual on-site sewage and water services (Policy 3.3.1 e)).

The Official Plan defines rural lands as those "located outside settlement areas" that "do not comprise prime agricultural areas in the Counties." These lands are intended to protect the County's natural amenities and rural character, while accommodating a range of other rural uses.

Beyond high-level policy direction—such as prioritizing growth in settlement areas, preserving rural characteristics, and protecting prime agricultural lands—most detailed policies, including the definition of "limited residential development" and specific permitted and accessory uses, are left to local municipal official plans and zoning-bylaws.

B. COUNTIES' OFFICIAL PLAN IS AMONG LEAST RESTRICTIVE WITH RESPECT TO REGULATING RURAL SEVERANCES

A review of official plans from other counties in Ontario reveals a number of common policies related to rural severances and subdivisions. Figure 1 illustrates that several policy tools frequently used elsewhere are absent from the UCLG Official Plan. Together with a more detailed policy review, this comparison indicates that UCLG is among the least restrictive county jurisdiction in Ontario with respect to regulating rural severances. Of the eight recurring policy themes identified, only four are present in the UCLG Official Plan. Notably, these four are also the most commonly adopted policies among the jurisdictions surveyed.

The four additional policies found in other official plans—but not in the UCLG Official Plan—are summarized below:

1. **Minimum lot sizes** - In UCLG, minimum lot sizes for rural lands are established through local official plans and zoning by-laws rather than the Counties Official Plan. By contrast, some counties set minimum lot sizes at the upper-tier level. UCLG does apply this approach in agricultural areas, where the Official Plan prescribes a minimum lot size of 40 hectares (Policy 3.2.5 a)).

2. **Restrictions on subdivisions nearby to existing settlement areas** – Four municipalities restrict or discourage plans of subdivision in areas adjacent to settlement boundaries. The intent is to ensure that rural subdivisions do not impede the future expansion of settlement areas or lead to fragmented, inefficient growth

patterns. The degree of restrictiveness varies: for example, Simcoe County applies policies similar to those for prime agricultural areas to lands within one kilometre of settlement boundaries, while others either “strongly discourage” such development (United Counties of Stormont, Dundas and Glengarry) or apply more stringent approval criteria where potential impacts on settlement expansion are identified (Ottawa).

3. **Limits on linear/ribbon/strip development** – Several official plans discourage excessive severances along major roads between settlement areas, as this pattern can lead to unplanned and costly extensions of settlement infrastructure into rural areas. To address this, some municipalities require consideration of ribbon development impacts before approving a severance, while others impose limits on lot density along certain roads. For example, Simcoe County defines strip development as “more than three non-farm lots within 200 metres of the proposed lot line, measured along the frontage on one side of the road.”

4. **Prohibition on Creating Landlocked Parcels** – Many official plans prohibit severances that would result in one or more lots lacking direct access to a public roadway, thereby preventing the creation of landlocked parcels. Although Counties’ staff general apply this principle in practice, explicitly incorporating this policy into the Counties’ Official Plan would formalize and strengthen the existing approach.

Figure 1 – Comparison of Rural Severance/Subdivision Official Plan Policies

	UCLG	Simcoe	Grey	Lanark	Ottawa	Prince Edward County	UCSDG	Renfrew	UCPR	Frontenac	Lennox & Addington
Growth to be prioritized in settlements	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Maintain rural character	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Minimum lot sizes			✓ (0.8 ha)		✓ (0.8 ha)			✓ (0.4 ha)	✓ (0.4 ha)		
Minimum distance from existing settlement		✓ (1 km)			✓ (1 km)		✓ (500 m)	✓ (1 km)			
Not permitted on prime agriculture or natural heritage lands	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Avoid linear/ribbon/strip development		✓				✓	✓	✓	✓		
Cannot lead to landlocked lots		✓	✓		✓	✓	✓	✓	✓	✓	
If on private water and/or wastewater systems, reports required to ensure quality standards will be met	✓*	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

* Counties' OP policies in this respect are generally less prescriptive than other upper tier official plans.

In addition to the common policies outlined above, several municipalities include more restrictive provisions in their official plans. Selected examples are summarized below.

General Prohibitions on Rural Subdivisions – Among the most restrictive jurisdictions are Ottawa and Prince Edward County, both of which generally prohibit rural subdivisions across most rural land-use designations. The Ottawa Official Plan does not permit "Country Lot Estates" within the Rural Countryside designation—which comprises the majority of the city's rural lands—except where applications were submitted prior to December 31, 2009. Similarly, the Prince Edward County Official Plan does not permit "country lot subdivisions" on lands designated as Aggregate, Environmental Protection, Waterfront, Open Space, Rural, or Shore Land.

Hard Cap on Size of Rural Subdivisions – The United Counties of Stormont, Dundas and Glengarry permit "Rural Estate Subdivisions", but place a hard cap on their size, allowing a maximum of 20 lots per application in rural district zoning areas.

Limits on Number of Severances – Several official plans also place limits on the total number of severances permitted from an original parcel. Grey County provides one of the most detailed approaches, establishing a sliding scale based on the size of the original lot. Figure 2 below summarizes this policy. Where a lot size falls between two categories, it may be rounded to the nearest size shown in the schedule. The Official Plan specifies that these limits represent maximum densities, and that local municipalities may adopt more restrictive standards in their own official plans. The plan also establishes a maximum frontage-to-depth ratio of 1:3 to prevent the creation of long, narrow parcels through severances.

Figure 2: Grey County: Permitted Rural Severances Based on Original Lot Size

Original Township Lot Size (in hectares)	Number of Severances Permitted	Total Lots Permitted including the Severed and the Retained
20	1	2
40	3	4
60	4	5
80	5	6

C. RECOMMENDATIONS FOR UCLG OFFICIAL PLAN

Anywhere between 140 dwelling units and 190 dwelling units were created, either through new lot division or consents to sever existing lots, between 2022 and 2024. This represents about one third of all units constructed in the Counties over that period.

Based on the analysis above, it is recommended that the Counties Official Plan include clear rural land division policies in order to ensure Counties land use planning objectives—including those that direct growth to urban settlement areas while preserving the character of rural areas in Leeds and Grenville—are achieved. The following policy recommendations are made for consideration within Section 3.0 Rural Area of the Counties Official Plan:

1. **Prevent the creation of landlocked parcels** – Prohibit severances that would result in lots without direct access to a public roadway, except where legal and practical access can be clearly demonstrated. Such a policy(ies) could be applied more broadly than just rural lands; for example, to lot creation in agricultural areas.

2. **Limit linear or ribbon development patterns** – Introduce policies that discourage or prohibit severances that contribute to strip or ribbon development between settlement areas. A definition of "strip or ribbon development" would likely be required.

3. **Introduce caps or density limits for consents and plans of subdivision** – Consider maximum limits on the number of lots that may be created through severance of an original parcel, as well as caps on the number of lots permitted within a single rural subdivision application.

4. **Consider upper-tier minimum standards for rural lot creation** – Current policy gives flexibility for local plans to establish minimum lot sizes. While this approach allows standards to reflect local conditions, the Counties could consider introducing baseline upper-tier standards—such as minimum lot sizes, densities, and frontage-to-depth ratios—while still allowing for local plans to adopt more restrictive standards where appropriate.

5. **Discourage rural subdivisions near existing settlement areas** – To avoid impeding future settlement area expansion or creating inefficient growth patterns, rural subdivisions should generally be discouraged in close proximity to existing settlement area boundaries. There is precedent in Ontario for both outright prohibitions and for more stringent approval criteria in these areas. The official plans reviewed typically establish buffers ranging from 500 metres to 1 kilometre

from settlement area boundaries. It is recommended that the Counties' consider a 1 kilometre buffer.

6. **PPS 2024 Alignment** – Review, and amend if necessary, the definitions of "rural area", "rural lands", "prime agricultural area" and "prime agricultural land" to ensure alignment with the Provincial Planning Statement 2024;

i. Development on Private Communal Sewage and Water Systems

The PPS provides some flexibility for the use of private communal servicing systems, which may present opportunities to accommodate limited, targeted growth in rural settlement areas. The Counties Official Plan may wish to identify strategic locations where communal servicing could support tourism-related development and amenity-based residential growth, while ensuring consistency with Provincial policy and infrastructure capacity considerations.

ii. Growth Monitoring in Rural Areas

Finally, the Counties should continue its current practice of tracking and regularly reporting on rural severances and subdivisions over time. This practice allows the Counties to evaluate the effects of policy changes and support evidence-based adjustments in future official plan reviews.

APPENDIX D

CONSULTATION SUMMARY

Growth Management Strategy Timeline (June 11, 2026)

October 1, 2024	Request for Proposals issued in compliance with Procurement Policy
November 11, 2024	Email to Municipalities regarding TAG representation and background information compilation
December 4, 2024	Report to COW/Council regarding consulting team selection
December 17, 2024	Contract with Counties and Hemson completed
January 14, 2025	Project kick-off with Planning staff
January 15, 2025	Request to each local municipality for TAG representation
January 27, 2025	Data request to local municipal planning staff
February 3, 2025	Letter to Local Mayors and Councils re: GMS initiation
February 6, 2025	Meeting with Consultants and Local Municipalities regarding data request (Aug, EC, EK, LTI, MW, MNG)
March 6, 2025	Consulting team scheduled to present overview to PAC. PAC undertook a 90 day pause on the study (report was deferred and a 90 day pause was put in place)
July 9, 2025	PAC report to reinitiate Growth Management Strategy
July 24, 2025	Counties Council endorsed PAC recommendation
August 18, 2025	Counties dedicated webpage for the Growth Management Strategy goes live.
August 1 to 19, 2025	Gathering of development community contacts from municipalities.

Growth Management Strategy Timeline (June 11, 2026)

August 25, 2025	Status update letters sent to each local municipal CAO for distribution to local Mayors/Councils. Also sent to public PAC members.
Aug. 26 - Sept. 29, 2025	Survey posted on Counties website to obtain public and stakeholder input about potential future development lands (about 15 surveys received).
August 27, 2025	Notice of study on Counties and local websites, Counties Facebook page and social media.
August 27, 2025	Direct emails/letters to any identified key stakeholders (major landowners, developers, potential developers) in each municipality.
September 10, 2025	Initial meeting with the Technical Advisory Group (TAG) (representatives from every local municipality, plus MMAH and Counties' Departments).
Sept. 10 & 11, 2025 -	Individual meetings with each local municipality (CAOs, planners) to offer an opportunity for further discussion and input from each local municipal perspective.
Early September, 2025	Notice of the study and consultation in the newspapers (see above for others circulated earlier in process).
Oct. 2, 2025 (4:00 p.m.)	Virtual public consultation by consulting team with stakeholders (about 25 people on the line).
November 10, 2025	Meeting with TAG (includes local municipalities) - initial draft forecasts (low, medium, high scenarios) and land needs assessment presented for early input from TAG and local municipalities.

Growth Management Strategy Timeline (June 11, 2026)

November 12, 2025	Circulation of initial presentation on draft forecasts and land needs to TAG (local municipalities). Deadline for comments by November 21, 2025.
November 20, 2025	Reminder to TAG (including local municipalities) regarding comments on initial forecasts and lands needs.
December 8, 2025	Final circulation of revised initial presentation on draft forecasts and land needs to TAG (local municipalities).
December 10, 2025	Findings on growth scenarios and growth options will be presented to PAC/Council for discussion, input and direction. PAC endorses the high growth option in principle.
March 2 & 3, 2026	Public/stakeholder consultation on forecasts, land needs and proposed growth options. Planned consultation in multiple locations. Notices in the newspapers, on Counties and local websites, Counties Facebook page and social media. Notice also circulated to stakeholders. – Approximately 47 persons in attendance at 3 locations and a virtual session (15).
March 27, 2026	Meeting with TAG (includes local municipalities) – presentation and discussion of policies in the initial draft document.
April 8, 2026	Draft Growth Management Strategy circulated for initial comment to TAG (includes local municipalities), initial comments by April 15, 2026.
April 15, 2026	Comments received from 8 municipalities and UCLG Housing. Included AUG, EC, EK, MW, MNG, RL, TLTI and WEST
May 14, 2026	Meeting with consultants and Merrickville-Wolford regarding initial comments, specifically regarding allocations.

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May 15, 2026	Meetings held with Edwardsburgh Cardinal and Rideau Lakes regarding initial comments, specifically regarding allocations.
May 22, 2026	Meeting held with Westport regarding initial comments, specifically regarding allocations.
June 5, 2026	Second Draft Growth Management Strategy circulated for comment to TAG (includes local municipalities), comments to be brought to TAG meeting June 15, 2026.
June 15, 2026	TAG (includes local municipalities) meeting to discuss revised GMS.
July 8, 2026	Draft Growth Management Strategy presented to PAC for review.

***For consultation events** – local newspaper ads placed, dedicated Counties webpage, request to local municipalities to put on local webpages, social media multiple times (Twitter/X), stakeholder list members advised (several hundred members gathered throughout the study), Technical Advisory Group advised, Counties Council, Local Planners/Clerks/CAOs advised

GLOSSARY OF TERMS

Glossary of Terms

Census division: A group of neighbouring municipalities joined together for the purposes of regional planning and managing common services (per Statistics Canada). The Leeds and Grenville Census Division includes the Counties, the City of Brockville, and the Towns of Prescott and Ganaoque.

Complete communities: means places such as mixed-use neighbourhoods or other areas within cities, towns, and *settlement areas* that offer and support opportunities for equitable access to many necessities for daily living for people of all ages and abilities, including an appropriate mix of jobs, a full range of housing, transportation options, *public service facilities*, local stores and services. *Complete communities* are inclusive and may take different shapes and forms appropriate to their contexts to meet the diverse needs of their populations (PPS 2024).

Designated growth areas: means lands within *settlement areas* designated for growth or lands added to *settlement areas* that have not yet been fully developed. *Designated growth areas* include lands which are *designated and available* for residential growth in accordance with policy 2.1.4.a), as well as lands required for employment and other uses (PPS 2024).

Employment area: means those areas designated in an official plan for clusters of business and economic activities including manufacturing, research and development in connection with manufacturing, warehousing, goods movement, associated retail and office, and ancillary facilities. An *employment area* also includes areas of land described by subsection 1(1.1) of the *Planning Act*. Uses that are excluded from *employment areas* are institutional and commercial, including retail and office not associated with the primary employment use listed above (PPS 2024).

Intensification: means the development of a property, site or area at a higher density than currently exists through:

a) *redevelopment*, including the reuse of *brownfield sites* and underutilized shopping malls and plazas;

b) the development of vacant and/or underutilized lots within previously developed areas;

c) infill development; and

d) the expansion or conversion of existing buildings (PPS 2024).

Regional market area: refers to an area that has a high degree of social and economic interaction. The upper or single-tier municipality, or planning area, will normally serve as the *regional market area*. However, where a *regional market area* extends significantly beyond these boundaries, then the *regional market area* may be based on the larger market area. Where *regional market area*s are very large and sparsely populated, a smaller area, if defined in an official plan, may be utilized (PPS 2024).

Rural areas: means a system of lands within municipalities that may include rural *settlement areas*, *rural lands*, *prime agricultural areas*, *natural heritage features and areas*, and resource areas (PPS 2024).

Rural lands: means lands which are located outside *settlement areas* and which are outside *prime agricultural areas* (PPS 2024).

Settlement areas: means urban areas and rural settlement areas within municipalities (such as cities, towns, villages and hamlets). Ontario's *settlement areas* vary significantly in terms of size, density, population, economic activity, diversity and intensity of land uses, service levels, and types of infrastructure available. *Settlement areas* are: built-up areas where development is concentrated and which have a mix of land uses; and lands which have been designated in an official plan for development over the long term (PPS 2024).