

City of Belleville

2018 Municipal Comprehensive Review of Urban Serviced Area



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Draft Report



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Executive Summary

The City of Belleville retained Watson & Associates Economists Ltd. (Watson), in association with Dillon Consulting Limited (Dillon), herein referred to as the Consultant Team, to undertake a Municipal Comprehensive Review (M.C.R.)¹ to the year 2041 as part of the City's Official Plan (O.P.) update. The primary objective of this assignment is to provide a long-term assessment of future urban growth and associated urban land needs to inform and support the City's new Official Plan (O.P.).² This study represents a critical background document regarding the City of Belleville's O.P. update.

The continued growth pressures north of Highway 401 and the future North East Industrial Park have prompted the City to seek direction in possible adjustments to the City's Urban Serviced Area. Integral to this analysis for the City of Belleville is a comprehensive review of how growth in the built-up area and remaining greenfield lands will be planned, phased and accommodated. This analysis is critical to guiding the timing and quantum of future land needs, as well as hard and soft infrastructure requirements associated with new development within the context of the current provincial and local policy framework.

The study has been organized into four phases. The report herein includes the results of Phases 1 and 2. Phase 1 includes a policy review of the draft City of Belleville O.P., as well as key amendments including the Loyalist Secondary Plan. In conjunction with the policy review, a detailed technical planning and economic analysis has been prepared to comprehensively assess the City's long-term urban land needs. Under the provincial policy framework, Phase 1 assesses the current boundary of the Urban Serviced Area and whether there is a sufficient amount of designated land available in greenfield and intensification areas to accommodate future residential and non-residential employment growth over a 20-year planning horizon. The study examines a scenario that includes the exchange of lands that are currently within the Urban Serviced Area for lands outside the Urban Serviced Area that have been recently

¹ An M.C.R. is used to establish a long-term vision and planning framework for a municipality that fosters a sustainable approach to future residential growth and economic development. Typically, an M.C.R. examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon (up to 20 years).

² Long-term growth assessment based on population, housing and employment forecasts to 2041 and the associated residential and non-residential land needs to 2038.

expropriated by the City of Belleville for the purpose of future industrial development. Phase 2 provides detailed policy direction and recommendations. A draft Official Plan Amendment (O.P.A.) incorporating recommendations and policy changes will be completed in Phase 3. Phase 4 will involve finalizing the O.P.A. The following provides a summary of the key M.C.R. findings.

Demographic and Socio-Economic Profile

Population and Housing Trends

Belleville's population grew by almost 13% between 1991 and 2016, increasing from 44,900 to 50,700 over the period.¹ During this time, average annual growth ranged between 0.1% and 1.2%. Over the past decade, population growth has been fueled primarily by net migration of persons in the 55-74 age group (empty-nesters and seniors), children (0-19 age group) and to a lesser extent, seniors over the age of 75.

Since 2001, population growth from natural increase in Belleville has been limited or negative (i.e. deaths have outnumbered births) which has been attributed to declining fertility rates and the aging of the City's baby boomer population (i.e. persons born between 1946 and 1964). Belleville's population is older than the provincial average and is aging at a faster rate than the provincial average (i.e. in terms of the percentage increase of persons 65 years of age or greater).

Belleville's existing housing stock is dominated by low-density built form, with approximately 63% consisting of single and semi-detached units as of 2016. The City's housing mix has not changed significantly over the 1991 through 2016 period. Average household size in Belleville is relatively low in comparison to the Province.

Employment Growth Trends

Between 2001 and 2016, the City's employment base increased modestly from 32,360 to an estimated 32,870. Belleville has demonstrated relatively steady employment growth in a number of sectors where it has a relatively high concentration of employment, including manufacturing and health care services. The City has also experienced strong employment growth in the past five years in finance and insurance, and transportation and warehousing relative to the average provincial growth rate. The

¹ Excluding Census undercount of approximately 2.5%. The net Census undercount represents the net number of persons missed during Census enumeration.

proportion of employment (jobs) in Belleville to total labour force remains positive, indicating that the City of Belleville is a net importer of jobs.

The majority of Belleville's employment base is accommodated on the City's designated employment lands, commercial lands and Community Facility lands. Belleville has a broad, competitive and diverse employment lands base comprised of seven designated Employment Areas with a developed land area of 568 net ha (1,403 net acres). Of the seven designated Employment Areas, employment is largely concentrated in the City's North East Industrial Area. The North East Industrial Area accommodates a number of the City's major employers and approximately 5,000 jobs,¹ a significant portion of the City's employment base.

In terms of the City's commercial designated lands, it is estimated that the City has a retail base of approximately 4.1 million sq.ft. of built retail G.L.A. (Gross Leasable Area).² A large portion (46%) of this space is concentrated in a retail node situated near an interchange of Highway 401 at North Front Street that serves the Greater Bay of Quinte Region.³ Approximately 8% of the retail space in the City of Belleville is currently vacant which suggests a balanced and healthy retail market. Belleville's Community Facility lands currently have a developed land base of 249 net ha (616 acres) and accommodate some of the Greater Bay of Quinte Region's major institutions, including Loyalist College and Quinte Health Care Corporation.

City of Belleville Growth Outlook to 2041

Growth Drivers

A number of key local drivers have been identified which are anticipated to influence future population, housing and employment growth within Belleville over the 2016 to 2041 period. Belleville's role as the largest urban centre within the Greater Bay of Quinte Region⁴ will continue to expand and evolve in retail trade, higher education and

¹ Based on business survey data provided from the City of Belleville.

² The retail base is comprised of purpose-built retail buildings and ground floor uses in the downtown core.

³ Trade area generally reflects the geographic area as defined by the Quinte Economic Development Commission Website, <https://quintedevelopment.com/wp-content/uploads/Bay-of-Quinte-Region-Demographic-Response-Package-Mar92018-1.pdf>, Appendix A, accessed June 1, 2018.

⁴ Refers to the geographic area as defined by the Quinte Economic Development Commission Website, <https://quintedevelopment.com/wp-content/uploads/Bay-of->

health services. New employment growth in select manufacturing sectors (i.e. food processing, logistics and distribution) is also anticipated which will provide local residents with a broad range of employment opportunities. Further, a number of major infrastructure projects at Canadian Forces Base Trenton are expected to generate permanent and temporary employment opportunities over the short, medium and longer term. Strong local employment growth potential within these sectors will continue to attract skilled labour to settle in the City.

Population growth of the 55-74 age category (i.e. baby boomers and younger seniors) across Ontario will continue to be a key driver of permanent housing in Belleville over the next 10 years and beyond. The source of net migration to Belleville within the 55-74 age category will largely be from the surrounding Bay of Quinte region and the Greater Toronto Hamilton Area (G.T.H.A.).

Population and Housing Forecast to 2041

Belleville's population is forecast to increase from 51,900 in 2016 to 58,300 by 2041, which represents an increase of 6,400 over the period.¹ Belleville's population growth is expected to average 0.5% per annum over the 25-year period, comparable to the trend observed over the 1991 to 2016 period. Over the forecast period, Belleville's share of Hastings County population is expected to increase marginally, in accordance with historical trends.²

Average net migration over the next 25 years is forecast to be marginally higher than historical levels experienced between 1991 and 2016, driven by the 55-74 age group. Over the 2016 to 2021 period, net migration is forecast to peak at 2,000 persons, followed by a gradual decline over the following two decades. This decline is anticipated as a result of the aging of the regional labour force base and slower population growth for the Province as a whole.

A total of 3,330 housing units are anticipated to be accommodated within the City of Belleville over the 2018 to 2038 period, representing an average of 167 units per year.

[Quinte-Region-Demographic-Response-Package-Mar92018-1.pdf](#), Appendix A, accessed June 1, 2018.

¹ Includes a Census undercount estimated at approximately 2.5%. The net Census undercount represents the net number of persons missed during Census enumeration.

² Based on Ministry of Finance projections for Hastings County, 2016-2041 (Spring 2017 Annual Population Projections).

Based on historical and forecast housing trends, it is estimated that 94% (3,300 units) of housing growth over this period will be accommodated within the urban area, while 6% (210 units) will be accommodated in the rural area. All of the housing development in the rural area is expected to consist of low-density housing. Within the Urban Serviced Area, future housing is anticipated to be comprised of 53% low-density units, 19% medium-density units and 28% high-density units. The percentage of new housing by structure type is expected to gradually shift towards medium- and high-density housing units over the next 25 years, driven by demand from baby boomers and the continued gradual erosion of housing affordability.

Employment Forecast to 2041

As of mid-2018, Belleville's employment base is estimated at approximately 32,930 jobs, a 0.2 % increase from the Census employment base of 32,870 jobs in 2016. Over the 2018 to 2041 forecast period, the City's employment base is expected to expand by approximately 4,000 jobs.

Employment growth is expected across a wide range of sectors driven by continued diversity of the regional and local economic base and steady local population growth. The City is anticipated to experience strong employment growth in the commercial sector, accounting for 39% of City-wide employment growth. The industrial and institutional sectors are each expected to account for 28% and 17% of the total employment growth, respectively. No fixed place of work (N.F.P.O.W.) and work at home employment are expected to account for 11% and 6% of employment growth, respectively.

Opportunities to Accommodate Growth

Housing Supply Opportunities

As of 2018, the City of Belleville's total potential supply inventory for new housing units was 9,619, of which 9,556 units (99%) are located within the urban area and 63 units (1%) are situated in the rural area. In terms of the potential supply in the Urban Serviced Area, 36% are low-density, 27% medium-density and 37% high-density units. The Loyalist Secondary Plan Central Zone accounts for 38% of housing supply opportunities identified within the Urban Serviced Area. In comparison, housing intensification opportunities within the City Centre account for 25%, followed by housing units in the development approvals process (22%), and residential development

opportunities on designated vacant residential lands outside the Loyalist Secondary Plan Area (15%).

Employment Land Supply Opportunities

Belleville has a total of 191 gross ha (471 gross acres) of vacant employment land. In determining the net vacant land inventory, downward adjustments were made to reflect environmentally sensitive lands/environmental features and internal infrastructure (i.e. roads, stormwater ponds, easements, etc.), where applicable. The majority of vacant employment land supply opportunities are located in the North East Industrial Park. In total, the City has a gross supply of 312 ha (7,171 acres) of vacant employment lands.

Commercial Land Opportunities

Net developable commercial land area is estimated to total 234 net ha (578 net acres). Approximately half the vacant designated commercial lands in the City of Belleville are located in the Loyalist Secondary Plan Area. Vacant land in this area is designated as “Employment Area” in the Loyalist Secondary Plan and is planned to accommodate a mix of commercial and industrial uses. While these lands are included in the commercial vacant inventory, it is important to recognize that these lands will develop and function differently than other designated commercial lands in Belleville given these lands permit some industrial uses.

Community Facility Land Opportunities

Belleville’s vacant designated Community Facility greenfield lands total 32 net ha (80 net acres) and are located in the Loyalist Secondary Plan in proximity to Loyalist College, a post-secondary institution.

Urban Land Needs to 2038

Over the next 20 years (2018 to 2038), forecast housing demand (3,330 housing units) is anticipated to be less than the identified housing supply opportunities (9,560 units), resulting in a surplus of approximately 6,260 housing units by 2038. As such, it is anticipated that the City currently has a more than adequate supply of residential lands within its existing urban boundary to accommodate forecast housing demand over the next 20 years. Based on this assessment, the City of Belleville has sufficient residential supply opportunities to accommodate residential growth through 2038.

While the Central Zone of the Loyalist Secondary Plan contains significant residential supply opportunities, the lands are not currently developable due to servicing cost challenges, as identified in the City's 2011 South Loyalist Secondary Plan Area-specific Development Charge Background Study and Area-specific By-law.¹ Excluding the Central Zone of the Loyalist Secondary Plan from the City's future residential land supply would result in a small deficit of low-density housing units by 2038. Given the challenges to extend municipal services into the Central Zone of the Loyalist Secondary Plan Area, urban expansion requirements north of Highway 401 should be considered during the City's next O.P. review. An O.P. Review process typically occurs in a 5 to 10-year time period after the current O.P. has been given final approval.

Commercial Land Needs

Over the forecast period, designated commercial lands are forecast to accommodate the bulk of the City's retail employment growth (a small portion, approximately 10%, is to be accommodated on employment lands). In addition to retail employment, designated commercial lands are anticipated to accommodate a portion of the City's institutional and office employment. The total demand for commercial designated land is approximately 14 ha. A large share of employment growth on commercial lands is anticipated to occur in the downtown area and on existing sites; the overall average of retail, office and institutional growth to be accommodated through intensification on commercial sites/downtown area is 34%. Based on the vacant designated commercial land supply identified, the City has sufficient designated vacant commercial land to accommodate forecast demand.

Community Facility Land Needs

Over the 2018 to 2038 period, Belleville's institutional employment base is forecast to increase by 630. Based on existing and forecast trends, it is estimated that 45% of this employment will be accommodated on Community Facility designated lands. The remaining 55% of institutional employment is expected to be accommodated within the downtown core, residential lands, commercial designated lands and industrial lands. Based on the Community Facility lands' forecast land demand and corresponding land supply opportunities, the City has sufficient designated Community Facility lands to accommodate forecast demand over the 2018 to 2038 period.

¹ City of Belleville 2011 South Loyalist Secondary Plan Area-specific Development Charge Background Study and Area-specific D.C. By-law, September 26, 2011, Watson & Associates Economists Ltd.

Employment Land Needs

Over the 20-year planning horizon, the City is expected to add a total of approximately 1,510 jobs on employment lands. While a portion of employment growth is expected to be accommodated through intensification, employment land demand is expected to total 81 net ha (200 net acres). To accommodate this employment growth, Belleville is expected to absorb 4 net ha (10 net acres) of employment lands annually, comparable to the historical average.

In accordance with the existing supply of developable vacant employment land, Belleville has a surplus of employment lands to meet long-term needs to 2038. Despite an identified surplus of employment land to accommodate growth to 2038, it is recommended that the City complete a land exchange to strengthen its competitive position and economic development potential. This would involve removing 276 gross ha/682 gross acres (excluding environmental features) of employment land located north of Highway 401 and east of Highway 37 from the City's urban boundary. These lands are currently unserviced and not considered serviceable within the forecast period.¹ In return, 166 gross ha/410 gross acres of expropriated rural agricultural land (located immediately to the east of the North East Industrial Area, located between Highway 401 and College Street East) would be brought into the Urban Serviced Area as employment land. It is important to note the land exchange would not exacerbate the City's employment land surplus and would result in reduced surplus of employment lands to 2038 (a surplus of 337 gross hectares/832 acres).

Recommended Employment Land Conversions

In association with the City of Belleville, all the City's designated employment lands have been reviewed on a site-by-site basis to determine if potential conversions to non-employment uses are appropriate and justified from a planning and economic perspective. In total, six sites have been identified for conversion, totaling 22 ha (55 acres). These sites are located in two mature industrial areas – the Sidney Street Industrial Area and the Waterfront Industrial Area. The industrial sites in the Waterfront Industrial Area are generally isolated and fragmented parcels which are independent of existing or planned Employment Areas within the City. The industrial site in the Sidney Street Industrial Area is not well-connected to the surrounding industrial area and is surrounded by residential uses. Thus, the proposed employment land conversion sites

¹ As identified in Chapter 5 on a map (Figure 37). Refer to Appendix F for the Water and Wastewater Infrastructure Review.

will have little to no impact on established Employment Areas. Given the relatively limited marketability of the subject sites, they will likely remain underutilized over the long term, which does not support the broader objectives of the 2014 P.P.S. to promote economic development and competitiveness. As such, all six employment land sites reviewed are recommended for conversion to a residential land use.

Policy Recommendations

This report also provides O.P. policy direction recommendations that will assist Belleville to effectively manage its supply of residential and non-residential land over the long term. Policy directions are provided for residential, commercial/community facility and employment lands in Chapter 10 herein, and are framed around the planning matters discussed earlier in the report.

1. Introduction

1.1 Terms of Reference

The City of Belleville retained Watson & Associates Economists Ltd. (Watson), in association with Dillon Consulting Ltd., in the fall of 2017 to prepare a long-term Municipal Comprehensive Review (M.C.R.) for the City to the year 2041. The primary objective of this assignment is to provide a long-term assessment of future urban growth and associated urban land needs to inform and support the City's new Official Plan (O.P.).¹ This study represents a critical background document regarding the City of Belleville's five-year O.P. review.

The continued growth pressures north of Highway 401 and the future North East Industrial Park have prompted the City to seek direction in possible adjustments to the City's Urban Serviced Area. Integral to this analysis for the City of Belleville is a comprehensive review of how growth in the built-up area and remaining greenfield lands will be planned, phased and accommodated. This analysis is critical to guiding the timing and quantum of future land needs, hard and soft infrastructure requirements and municipal finance impacts associated with new development within the context of the current policy framework under the 2014 Provincial Policy Statement (P.P.S.).

In accordance with the Terms of Reference for this assignment, the following key deliverables are required as part of this M.C.R. exercise:

- A long-term demographic analysis and growth forecast which will project long-term population, housing and employment growth for the City from 2016 to 2041;
- A residential intensification assessment which identifies where intensification is projected to occur within the City's built boundary;
- A detailed allocation of population, housing and employment growth between the built-up area and designated/future greenfield area;
- An assessment of long-term (i.e. 2038) residential and commercial/institutional land needs in accordance with subsections 1.1.3.8 and 1.3.2 of the 2014 P.P.S.; and
- Policy recommendations regarding residential, commercial/institutional and employment lands development, complete with phasing policies to ensure that

¹ Long-term growth assessment based on population, housing and employment forecasts to 2041 and the associated residential and non-residential land needs to 2038.

future population and employment growth is sequentially planned, serviced and developed in a manner that promotes the development of a complete, economically competitive and sustainable City.

1.2 What is a Municipal Comprehensive Review?

An M.C.R. is used to establish a long-term vision and planning framework for a municipality that fosters a sustainable approach to future residential growth and economic development. Typically, an M.C.R. examines future population and employment growth potential and corresponding urban land needs over a long-term planning horizon (up to 20 years).

1.3 Study Process

The study has been organized into four phases. The report herein includes the results of Phases 1 and 2. Phase 1 includes a policy review of the draft City of Belleville O.P., as well as key amendments including the Loyalist Secondary Plan. In conjunction with the policy review, a detailed technical planning and economic analysis has been prepared to comprehensively assess the City's long-term urban land needs. Under the provincial policy framework, Phase 1 assesses the current boundary of the Urban Serviced Area and whether there is a sufficient amount of designated land available in greenfield and intensification areas to accommodate future residential and non-residential employment growth over a 20-year planning horizon. The study examines a scenario that includes the exchange of lands that are currently within the Urban Serviced Area for lands outside the Urban Serviced Area that have been recently expropriated by the City of Belleville for the purpose of future industrial development. Phase 2 provides detailed policy direction and recommendations. A draft Official Plan Amendment (O.P.A.) incorporating recommendations and policy changes will be completed in Phase 3. Phase 4 will involve finalizing the O.P.A.

2. Overview of Macro-Economic Outlook and Regional Employment Trends

The following Chapter provides a summary of the macro-economic trends influencing regional labour force and employment trends within Hastings County¹ as well as the City of Belleville over the past two decades. It is noted that historical time periods examined within this chapter vary due to data availability.

2.1 Trends in Provincial Economy

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by G.D.P. (gross domestic product) output, has shifted from the goods-producing sector (i.e. manufacturing and primary resources) to the services-producing sector. Much of this shift has occurred during the past decade, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. In contrast, service-based sectors such as financial and business services have seen significant increases over the past several years.

While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province. In general, globalization has led to increased outsourcing of production processes to overseas manufacturers. While there will continue to be a manufacturing focus in Ontario, industrial processes have become more capital/technology intensive and automated. The highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

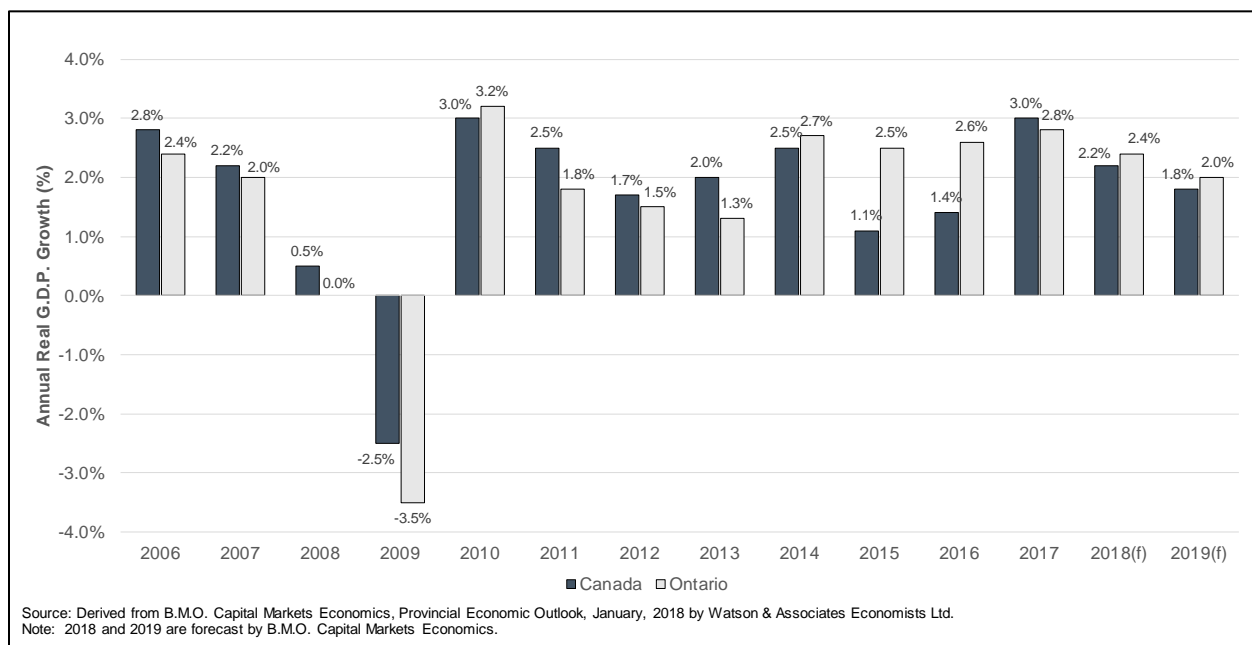
While the Ontario economy has experienced a rebound in economic activity since the 2008/2009 downturn, this recovery has been relatively slow to materialize. That said, provincial G.D.P. levels have sharply rebounded since 2013 and are forecast to remain above the national average in 2018/2019, as illustrated in Figure 1. Stronger provincial economic growth is attributed, to some extent, to the steady improvement in the

¹ For the purpose of this study, Hastings County (Census District) includes the separated Cities of Belleville and Quinte West in accordance with Statistics Canada.

economic outlook for the U.S. and an improving export market due, in part, to a lower-valued Canadian dollar.¹

While the performance of the provincial economy is anticipated to remain strong over the near-term, there are potential risks to the national and provincial economies that are important to recognize. More specifically, this includes risks with respect to the proposed renegotiation of the North American Free Trade Agreement (NAFTA), the adoption of more protectionist trade measures in the U.S., as well as other proposed changes to U.S. fiscal and industrial policies. Domestically, the housing market continues to pose a significant risk to the overall economy. The sharp rise in Ontario housing prices – particularly in the Greater Toronto and Hamilton Area (G.T.H.A.) – has contributed to record consumer debt loads and eroded housing affordability.²

Figure 1
Province of Ontario and Canada
Annual Real G.D.P. Growth, Historical (2006 to 2017) and Forecast (2018 to 2019)



¹ Valued at approximately \$0.80 U.S. as of April, 2018.

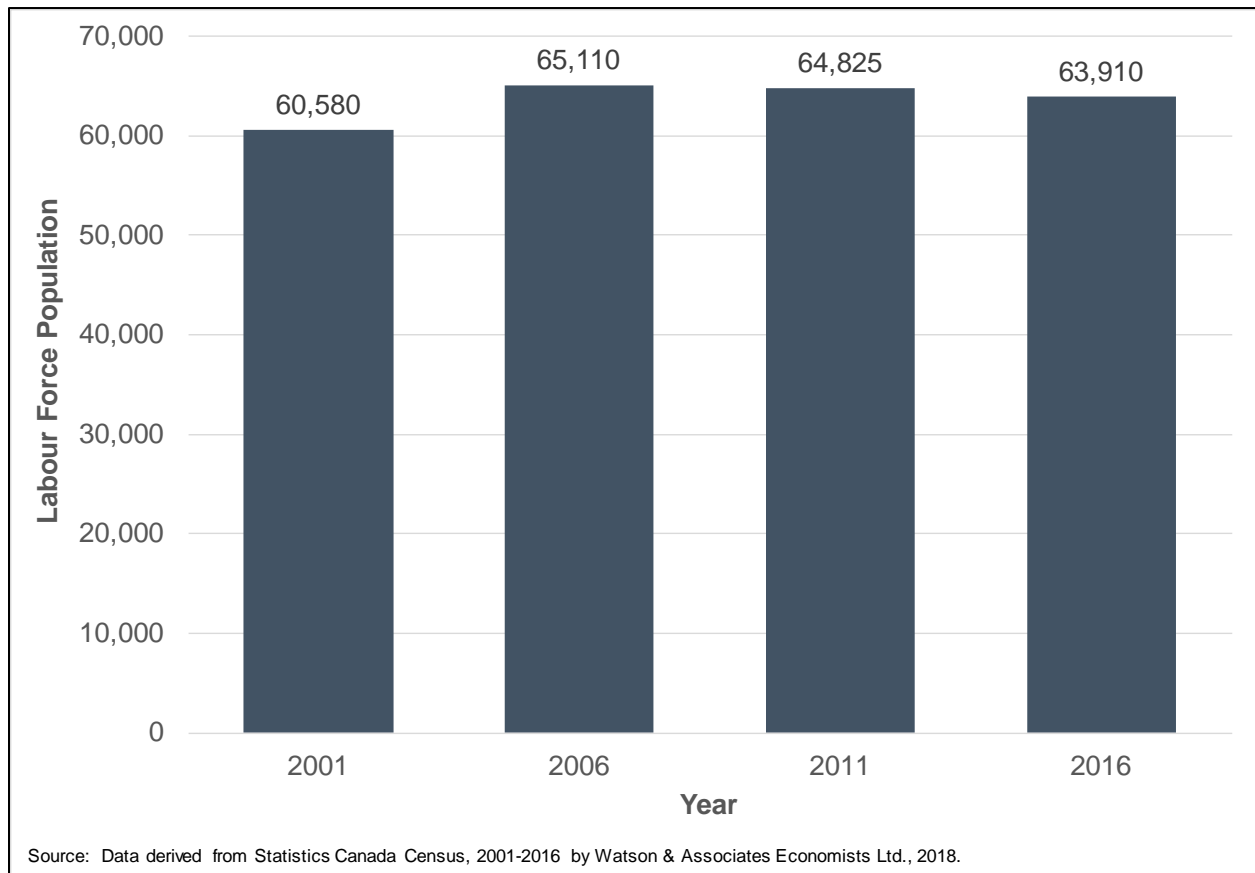
² Economic and Fiscal Outlook. Financial Accountability Office of Ontario (F.A.O.). Assessing Ontario's Medium-Term Prospects. Spring 2017.

2.2 Labour Force Trends

2.2.1 Regional Labour Force Trends, Hastings County, 2001 to 2016

Figure 2 summarizes historical labour force trends within Hastings County over the 2001 to 2016 period. During the 2001 to 2006 period, Hastings County experienced an increase in total labour force of approximately 7%, or 4,530. The County's labour force has declined marginally over the past decade from 65,110 in 2006, to 64,825 in 2011 to 63,910 in 2016.

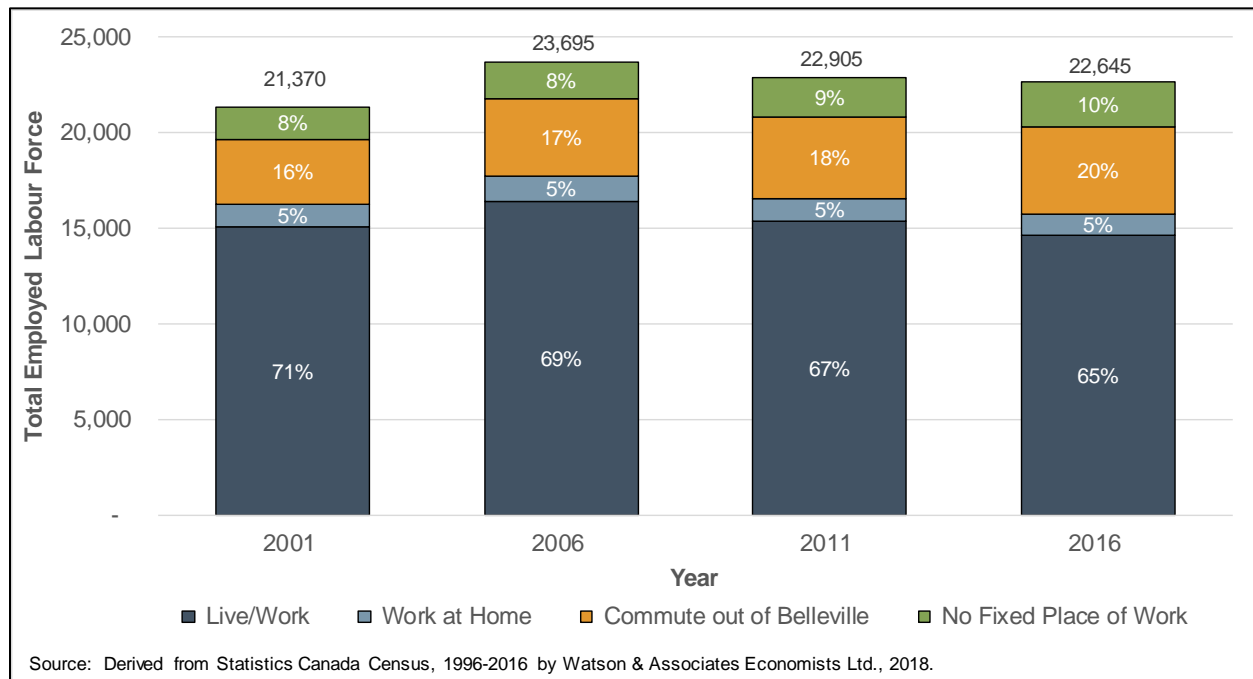
Figure 2
Hastings County
Labour Force Population, 2001 to 2016



2.2.2 City of Belleville, Labour Force by Place of Work, 2001 to 2016

Figure 3 summarizes historical trends in the City of Belleville's labour force base by place of work. As illustrated below, the Belleville labour force is highly concentrated by those who live and work within the City. As of 2016, approximately 70% of Belleville's employed labour force live and work in the City or work from home. Over the past 15 years, the share of live/work labour force has gradually declined from 71% in 2001 to 65% in 2016, due to an increase in Belleville residents commuting outside the City for work. Section 2.4 provides a more detailed discussion of recent commuting patterns within the City of Belleville.

Figure 3
City of Belleville
Employed Labour by Place of Work (2001 to 2016)



2.3 Education Attainment

Figure 4 summarizes the highest level of education achieved by Belleville residents 15 years of age and older, compared to Hastings County and the provincial average in 2016. Key findings include:

- Generally, Belleville compares favourably with Hastings County in terms of educational attainment, but lags the provincial average in terms of higher education (university degree or higher);
- Of Belleville residents aged 15 and older, 81% of the population has a high school education or higher, which is comparable to Hastings County at 80%, but lower than the Province (83%); and
- Belleville has a lower share of residents 15 years of age and older that have a university bachelor's degree or higher compared to the provincial average (14% vs. 25%), but a higher share of residents with college certificates or diplomas (26% vs. 22%).

Figure 4
City of Belleville
Highest Level of Education (2016)

Highest Level of Education	City of Belleville	Hastings County	Province of Ontario
No Certificate, Diploma or Degree	19%	20%	17%
High School Certificate or Equivalent	29%	29%	26%
Trade Certificate (No Post Secondary Education)	12%	15%	11%
College Certificate or Diploma	26%	25%	22%
University Degree or Higher	14%	10%	25%
Total	100%	100%	100%

Source: Data derived from Statistics Canada 2016 Census profiles by Watson & Associates Economists Ltd., 2018.

Over the 2006 to 2016 period, the share of Belleville residents 15 years of age and older with a higher education, including trade certificates, college certificates or diplomas and university degrees or higher, has increased from 46% to 52%.

2.4 City of Belleville Commuting Trends

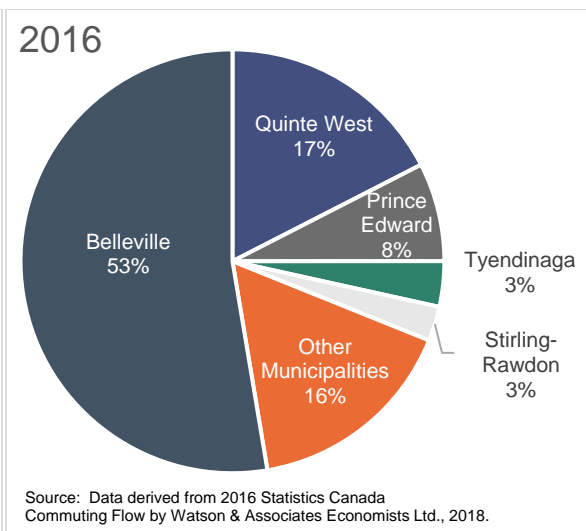
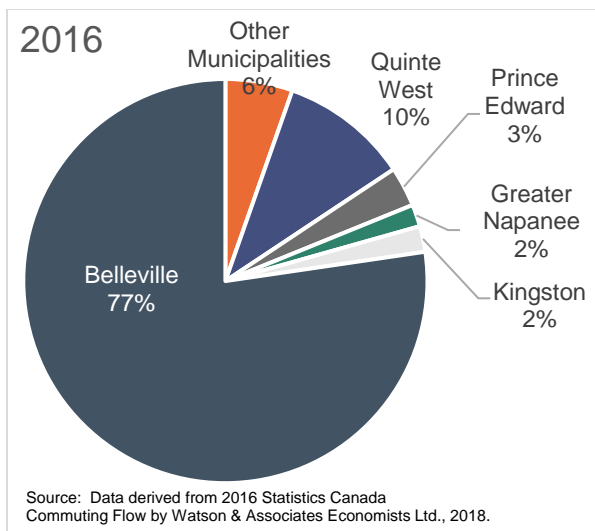
Figure 5 summarizes where Belleville residents commute to for employment and where those employed in Belleville commute from. Of the employed Belleville labour force, 77% work within Belleville; meanwhile, 10% commute to Quinte West and approximately 13% to other municipalities. Of the total employment base in Belleville, 53% of jobs are held by Belleville residents while 17% commute from Quinte West and approximately 30% commute from other municipalities.

The City of Belleville remains relatively “self-contained” though the live-work ratio has decreased slightly over the past decade, falling from 82% in 2006 to 77% in 2016. The number of people who work in Belleville but reside in other municipalities has remained relatively stable over the past 10 years.

**Figure 5
City of Belleville
Commuting Patterns, 2016**

Where Belleville residents commute to

Where Belleville employees commute from

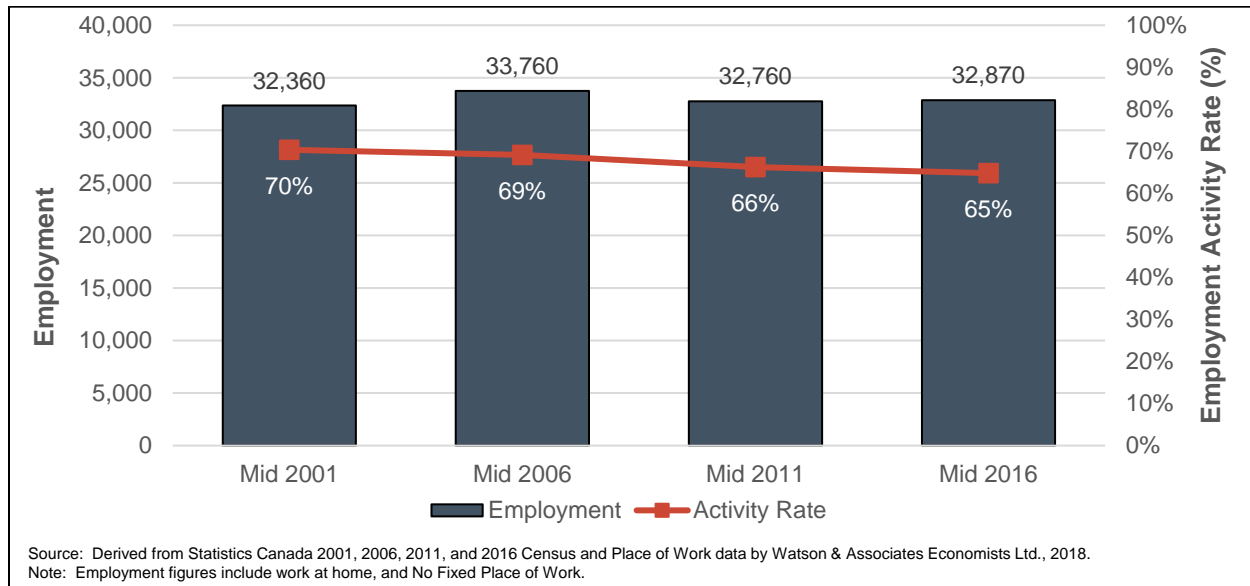


2.5 City of Belleville Employment and Non-Residential Development Trends

2.5.1 City of Belleville Employment Trends by Place of Work

Over the 2001 to 2016 period, the City's employment base has remained relatively stable, ranging between 32,360 in 2001 to 32,870 in 2016, as illustrated in Figure 6.¹ During this period, employment growth within the City of Belleville averaged 0.1% annually. Over the past decade, the City's employment activity rate² has declined moderately, from 69% in 2006 to 65% in 2016, as shown in Figure 6.

Figure 6
City of Belleville
Employment Base and Activity Rate, 2001 to 2016



¹ Watson & Associates Economists Ltd. (includes no fixed place of work and work at home).

² An employment activity rate is defined as the number of local jobs in a municipality divided by the resident population.

Figure 7 illustrates Belleville's employment base by sector for 2016. The largest sector in Belleville is retail trade which accounts for 19% of the total employment base. Other key sectors in Belleville include health care and social assistance, and manufacturing which comprise 16% and 15%, respectively, of the total employment base.

Figure 7
City of Belleville
Employment Base by Sector, 2016

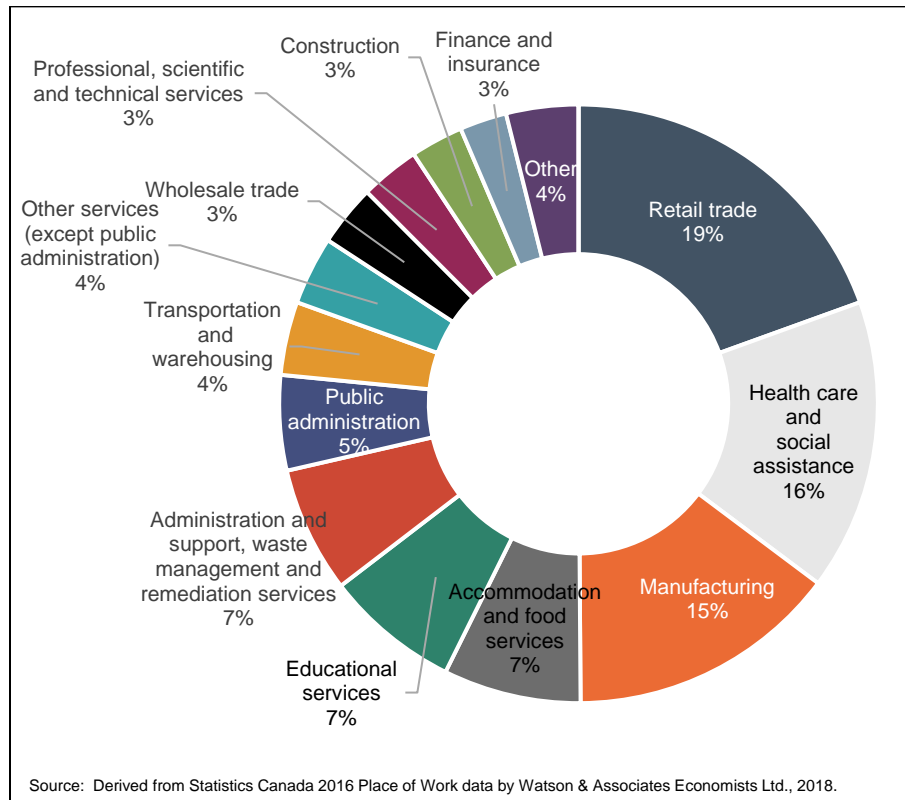
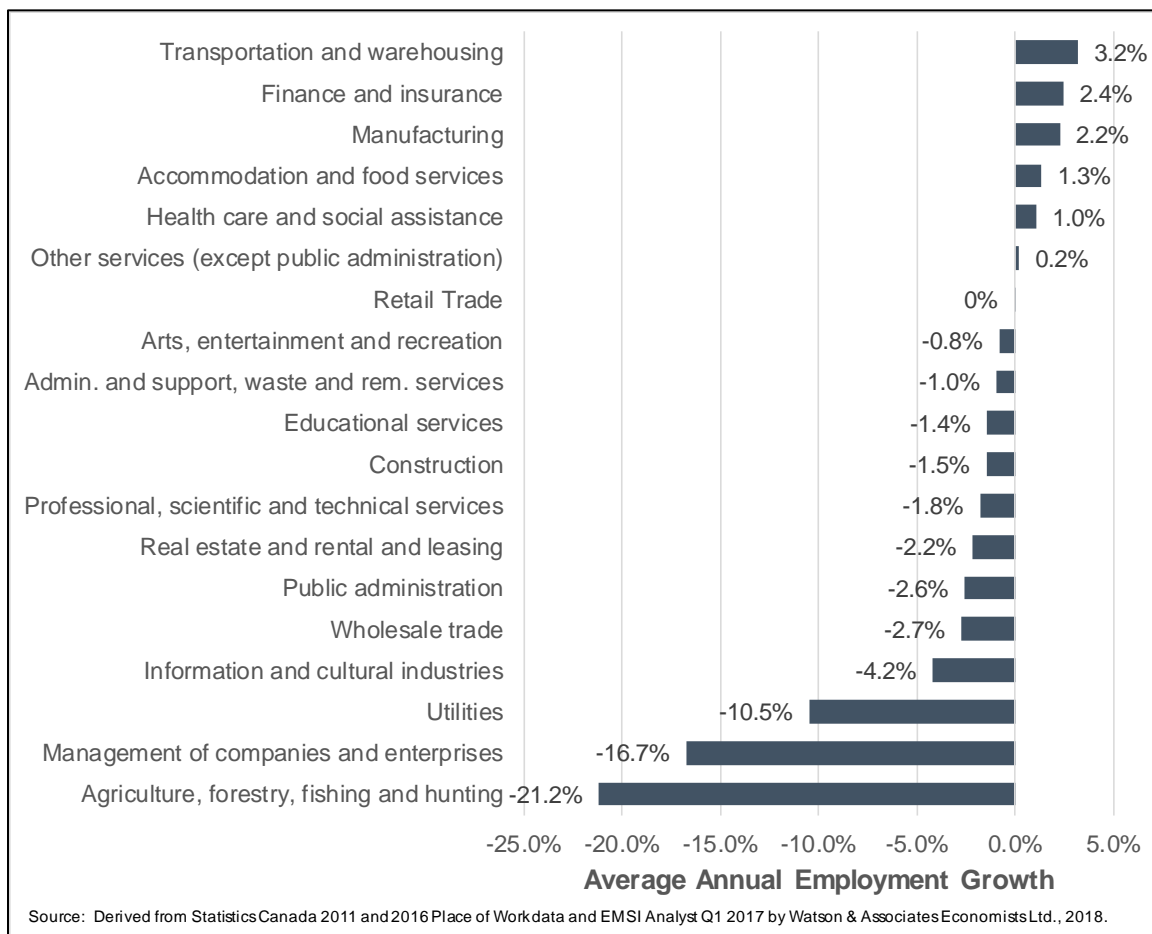


Figure 8 illustrates the employment change by industry sector over the 2011 to 2016 period in Belleville. As shown, the fastest growing employment sectors were primarily in the services-producing sector, including finance and insurance; accommodation and food services; and health care and social assistance. Of the industrial sectors, transportation and warehousing, and manufacturing, exhibited the strongest employment growth during this period. In contrast, the remaining industrial sectors such as construction, wholesale trade, and the utilities sector exhibited an employment decline over the 2011 to 2016 period.

Figure 8
City of Belleville
Average Annual Employment Growth by Sector, 2011 to 2016

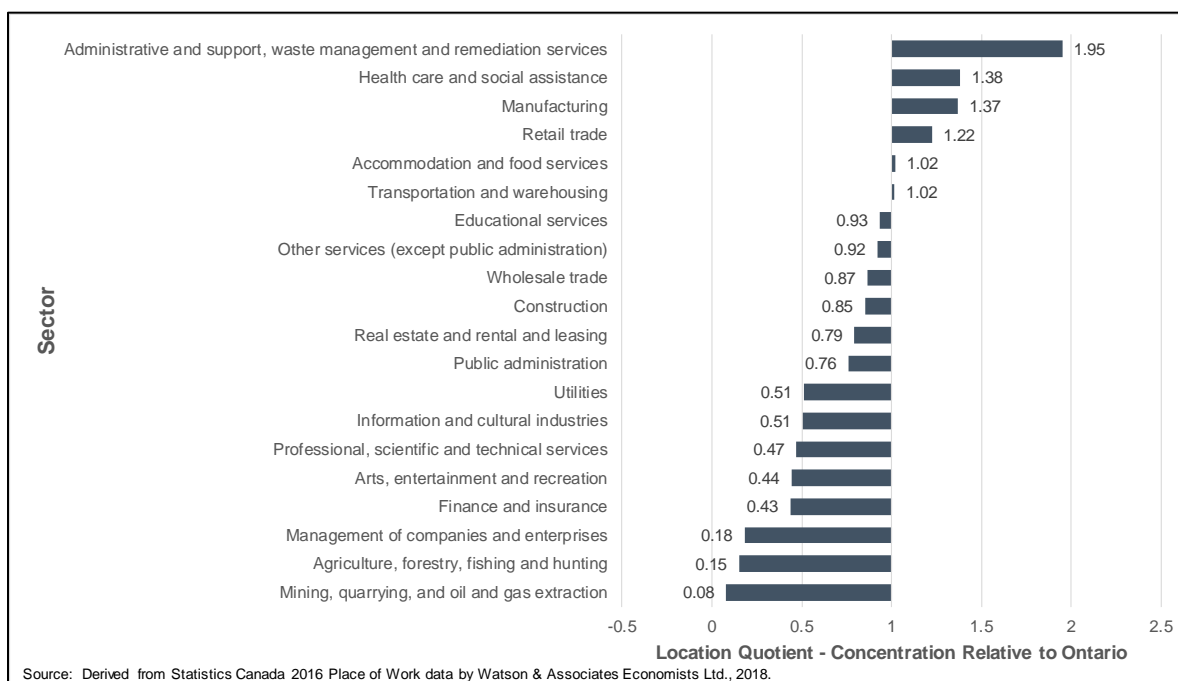


2.5.2 Industry Clusters in Belleville

Figure 9 illustrates the strength of employment sectors in the City of Belleville relative to the Province of Ontario using Location Quotients (L.Q.).¹ As shown, Belleville's economy is largely oriented towards administration and support, waste management and remediation services; health care and social assistance; manufacturing; and retail trade. Belleville has a relatively lower concentration of employment in all other sectors compared to the provincial average, except for accommodation and food services; and transportation and warehousing, which are close to the provincial average.

Belleville has demonstrated relatively steady employment growth in a number of sectors where it has a relatively high concentration of employment, including manufacturing and health care services. The City has also experienced strong employment growth in the past five years in finance and insurance, and transportation and warehousing, which are relatively less concentrated in Belleville compared to the provincial average.

Figure 9
City of Belleville
Location Quotient Relative to Ontario, 2016



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

2.5.3 Non-residential Building Permit Activity

Figure 10 summarizes non-residential construction (sq.ft.) over the past 5 years (i.e. 2013 to 2017) in the City of Belleville by major sector. Over the period, Belleville averaged 174,600 sq.ft. of non-residential development.

**Figure 10
City of Belleville
Historical Non-Residential Development Activity, 2013 to 2017**

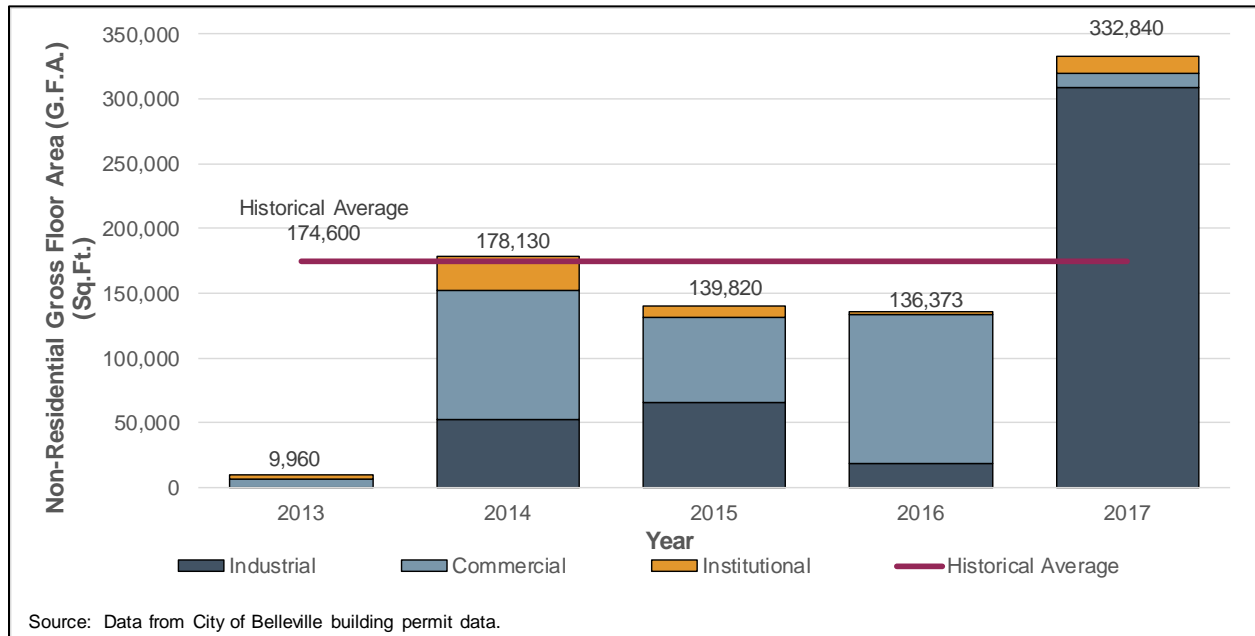
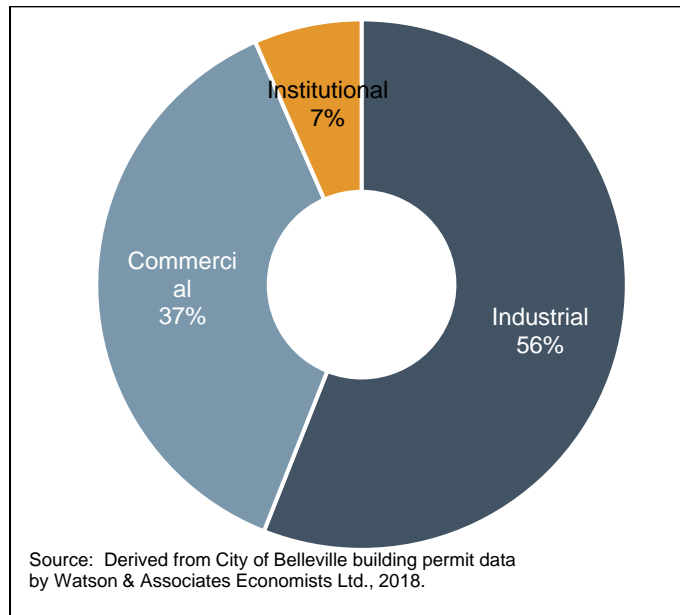


Figure 11 summarizes the share of non-residential development by major sector over the five-year period. As shown, industrial development comprised the majority of the non-residential development (56%) during the period. In comparison, commercial and institutional development accounted for 37% and 7% of the total non-residential development, respectively, during the period.

Figure 11
City of Belleville
Non-Residential Development Activity by Major Sector, 2013 to 2017



2.6 Observations

Belleville's economy is largely oriented towards services-producing sectors, including retail trade, education, health care and social services, and accommodation and food services. Belleville's live-work ratio is strong and the economy remains "self-contained" with a high share of local residents employed within the City. Of those residents who do work outside Belleville, most commute to the City of Quinte West.

The regional and local labour force has remained relatively stable over the past decade. Education levels of Belleville's working-age population are comparable to regional and provincial averages. There is, however, a lower proportion of working-age residents that have a university bachelor's degree or higher when compared to the provincial average.

The City of Belleville has experienced moderate non-residential development activity over the past five years and the City's employment base has remained relatively stable. Over the 2011 to 2016 period, a significant share of the City's employment growth has been in the industrial sector, most notably within manufacturing, and transportation and warehousing. In contrast, employment growth in commercial and institutional sectors has been more limited. Belleville's employment activity ratio of jobs to population has declined over the past 15 years as the City's population growth rate has outpaced employment growth, as discussed in the following chapter.

3. Demographic and Housing Trends within the City of Belleville and the Surrounding Market Area

This chapter explores historical demographic and housing trends within the City of Belleville and the surrounding market area based on recent Statistics Canada data and other available information sources. It is noted that the historical time period investigated varies throughout this chapter, subject to data availability.

3.1 Hastings County Historical Demographic Trends

This section provides an overview of historical net migration trends for Hastings County¹ and the City of Belleville over the past 25 years.

3.1.1 Hastings County Historical Net Migration Trends by Type

Figure 12 (on the next page) illustrates historical net migration trends over the past 25 years in Hastings County and the City of Belleville. Between 1991 and 2016, approximately 57% of the total net migration within Hastings County occurred within the City of Belleville. From 1991 to 2001, the City of Belleville experienced relatively low net migration; however, net migration to the City increased significantly between 2001 to 2006. Though net migration has stabilized over the past decade, Belleville has experienced relatively higher levels of net migration compared to Hastings County.

¹ For the purpose of this study, Hastings County (Census District) includes the separated Cities of Belleville and Quinte West in accordance with Statistics Canada.

Figure 12
Hastings County and City of Belleville
Historical Net Migration Trends, 1991 to 2016

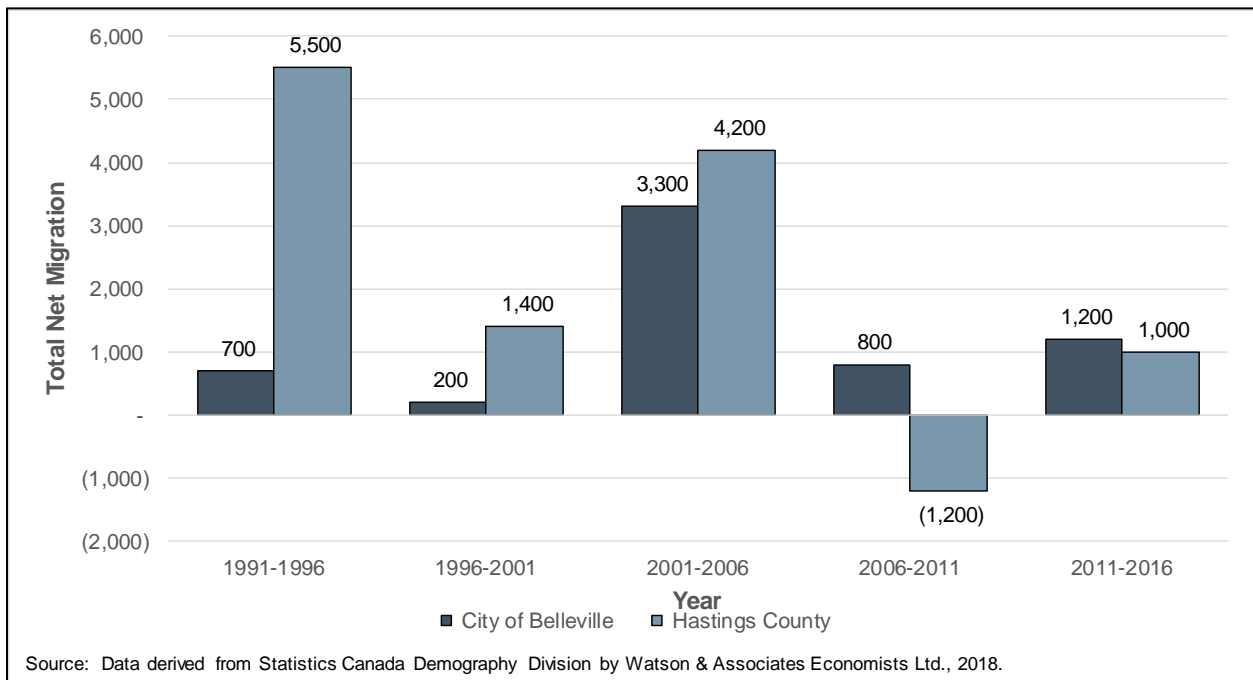
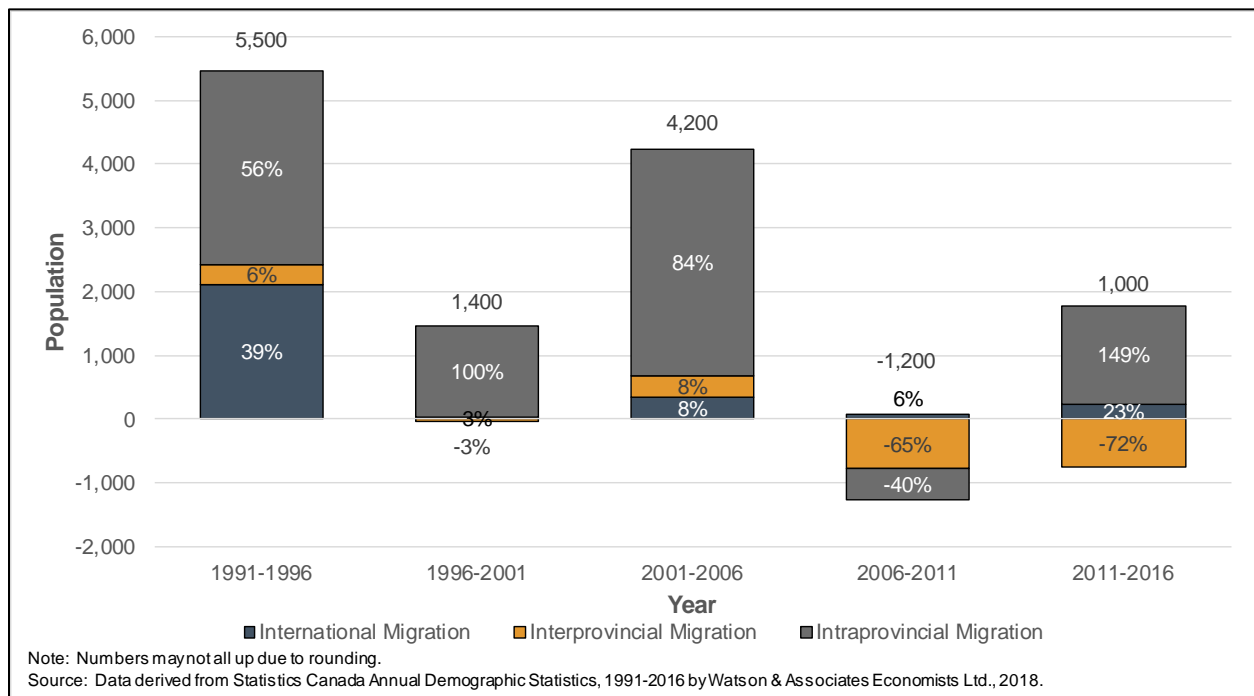


Figure 13 summarizes net migration trends in Hastings County by type over the 25-year period. Intraprovincial migration¹ has historically represented the largest component of net migration, ranging from 56% from 1991 to 1996, to 100% from 1996 to 2001, and most recently 149% from 2011 to 2016. The City’s share of international migration has been falling over the past two decades. Similarly, interprovincial migration² has steadily declined over the past 20 years.

**Figure 13
Hastings County
Historical Net Migration Trends**



¹ Represents movement between Census subdivisions, but residents remain in the same province or territory.

² Represents movement between provinces or territories involving a change in the usual place of residence.

3.1.2 Hastings County Historical Net Migration Trends by Age

Figure 14 (on the next page) summarizes historical net migration by age cohort within Hastings County and the City of Belleville over the past 10 years (i.e. 2006 to 2016). During this time period, the following net migration trends were observed:

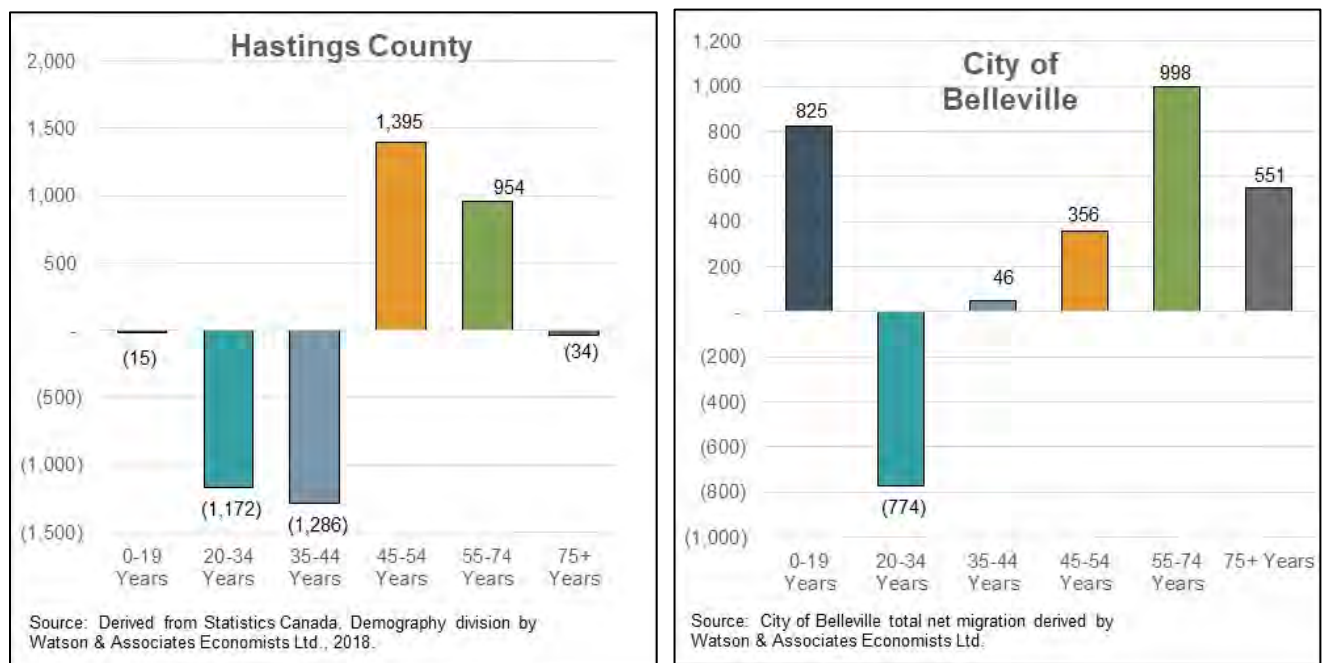
Hastings County

- Experienced significant net out-migration in the 20-44 age group (approximately 2,500 persons);
- Added approximated 2,300 persons to its population base in the 45-74 age group; and
- Experienced moderate losses in population in the 0-19 and 75+ age groups.

City of Belleville

- Net migration has largely been concentrated in the 55-74 age group. Over the past decade, approximately 77% of net migration to the City has been concentrated in this age group;
- Children (0-19 age group) also represent a significant share of net migration (approximately 41%); and
- Similar to Hastings County as a whole, the City of Belleville has experienced out-migration in young adults (20-34 age group). It is noted that the 20-34 age group was the only cohort to experience net out-migration in the City of Belleville over the past 10 years.

Figure 14
Hastings County and the City of Belleville
Historical Net Migration Trends by Age Cohort (2006 to 2016)



3.2 Review of Recent Demographic Trends, City of Belleville

3.2.1 Historical Population Trends, 1991 to 2016

Figure 15 and Figure 16 (shown on the next page) summarize historical population growth rates for the City of Belleville during the 1991 to 2016 period in accordance with Statistics Canada Census data. For comparative purposes, historical population growth rates have also been provided for Hastings County and the Province of Ontario. Key observations include the following:

- The City of Belleville's population base increased from 44,900 in 1991 to 50,700 in 2016;
- Over the past 25 years, the population base within the City of Belleville increased by 5,860 persons, or approximately 0.5% per year;
- Comparatively, the population base for the Province of Ontario grew at a significantly faster rate (1.2% annually) during the same time period; and
- Historically, population growth within Hastings County has also increased at a slightly faster rate than the City of Belleville; however, over the past five years (2011 to 2016), Belleville's rate of population growth has been notably stronger than the County's (0.5% vs. 0.2%).

Figure 15
City of Belleville
Historical Population, 1991 to 2016

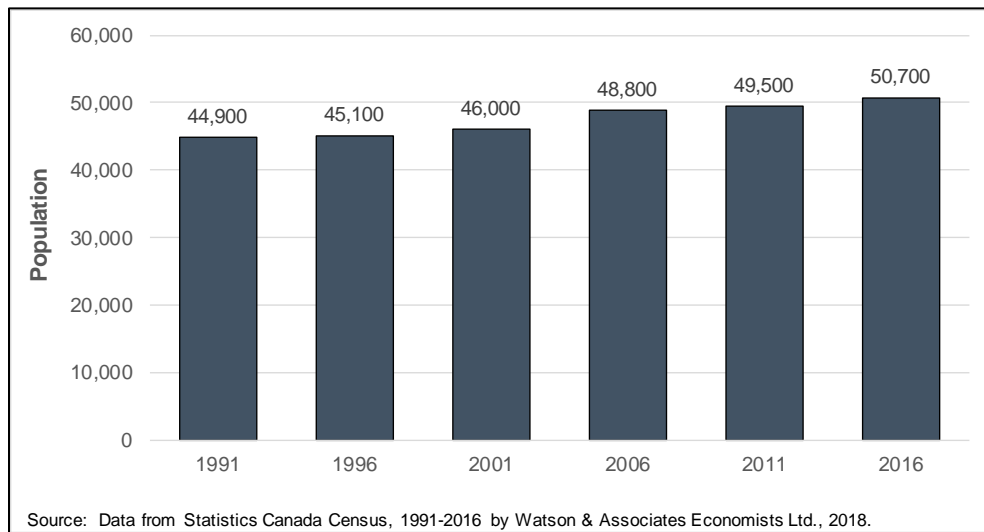
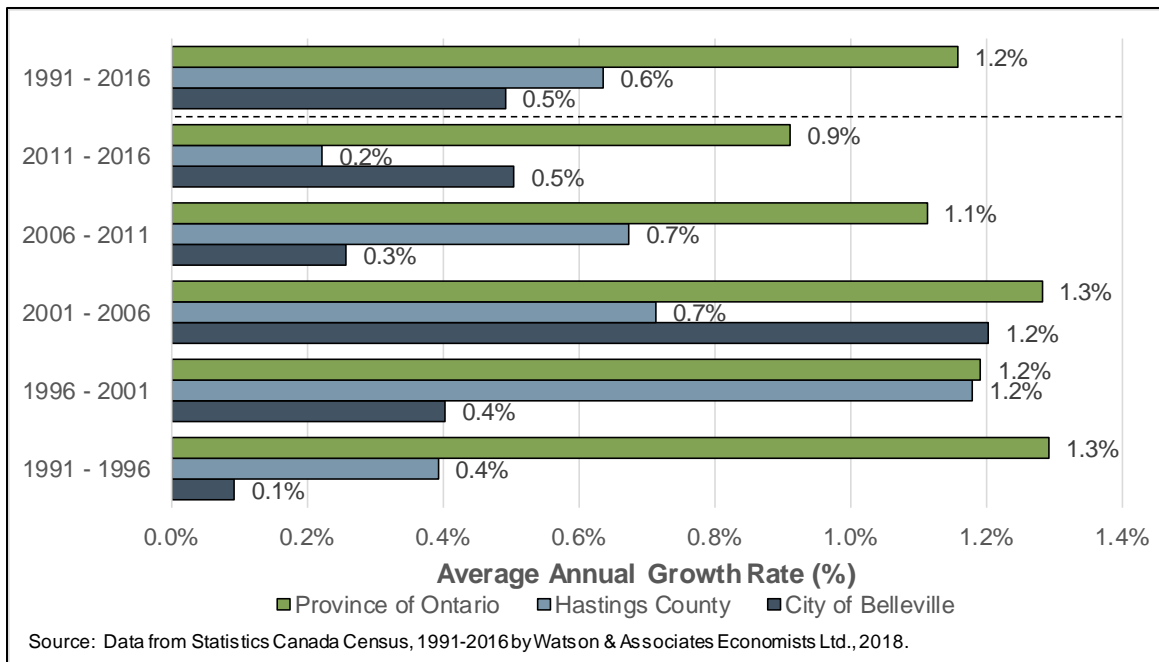


Figure 16
City of Belleville
Average Annual Population Growth Rate, 1991 to 2016



3.2.2 City of Belleville Components of Population Growth, 1991 to 2016

There are two primary components of population growth: natural increase (i.e. births less deaths), and net migration. Figure 17 summarizes historical trends regarding natural increase and net migration for Belleville. Key observations include the following:

- During the 1991 to 2016 period, net migration became an increasingly important component of population growth;
- Between 2001 and 2016, net migration represented a key driver of population growth. During this period, net migration averaged approximately 350 persons per year (1,800 per five-year period), compared to 50 annually during the 1991 to 2001 period; and
- Since 2001, population growth from natural increase in Belleville has been limited or negative (i.e. deaths have outnumbered births) which has been attributed to declining fertility rates and the aging of the City's Baby Boomer population (i.e. persons born between 1946 and 1964).

Similar to provincial trends, net migration within the City of Belleville is forecast to represent an increasing component of forecast population growth.

Figure 17
City of Belleville
Components of Population Growth, 1991 to 2016

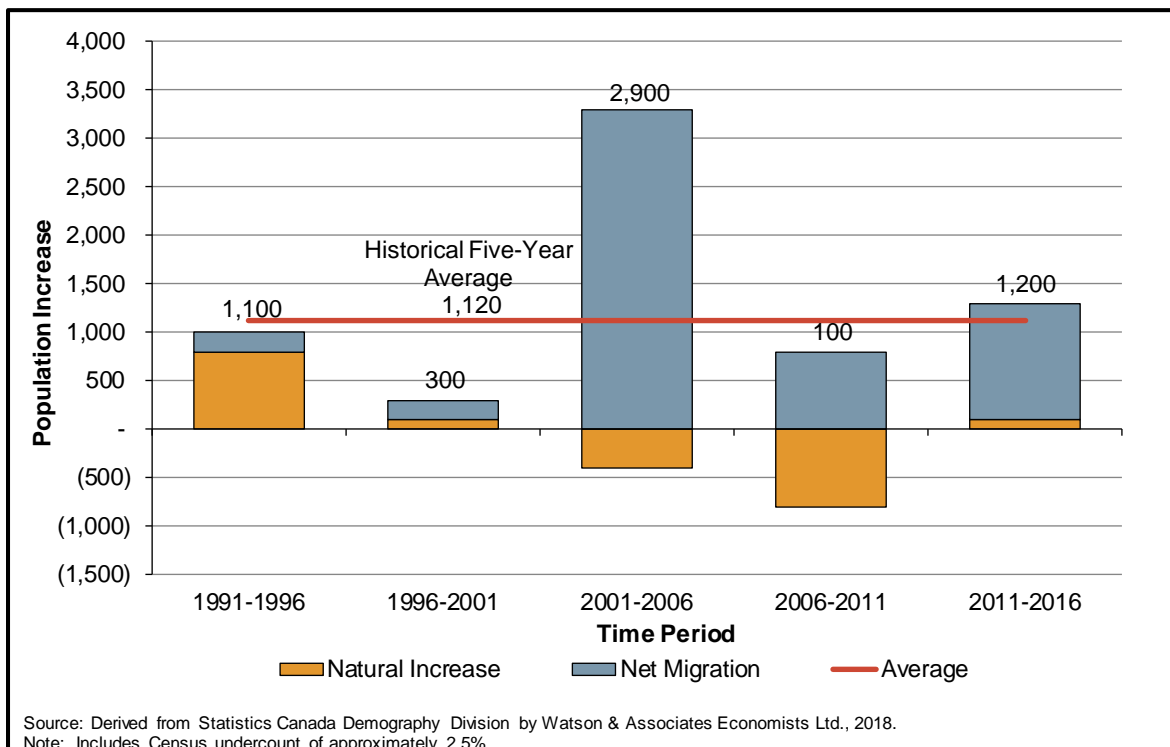


Figure 18 summarizes historical trends in population structure by age cohort over the 1991 to 2016 period by major age group. Figure 19 summarizes the 2016 population age structure in the City of Belleville compared to Hastings County and the Province. Key observations regarding the City of Belleville population forecast by age include the following:

- In 2016, the 0-19 age cohort (youth population) in Belleville accounted for 21% of the total population. Proportionately, the population share of this age cohort decreased from 26% in 1991;
- Similarly, Belleville's young adult/adult population (20-34 years of age) experienced a similar rate of decline as the 0-19 age cohort, comprising approximately 19% of the population in 2016);
- The share of the 35-44 age group moderately decreased from 14% in 1991 to 11% in 2016;
- Adults 45-54 years old accounted for 13% of the 2016 population, up from 10% in 1991;
- The 55-74 age group (empty-nesters/younger seniors) increased by 6% between 1991 and 2011, from 19% to 25%, with much of the increase occurring between 2011 and 2016;
- The 75+ age group (older seniors) increased from 7% in 1991 to 10% in 2016; and
- Comparably, the City of Belleville has a proportionally higher share of older adults and seniors (55+) relative to the Province, which is offset by a slightly lower share of population in the other age groups.

Figure 18
City of Belleville
Population by Age Cohort, 1991 to 2016

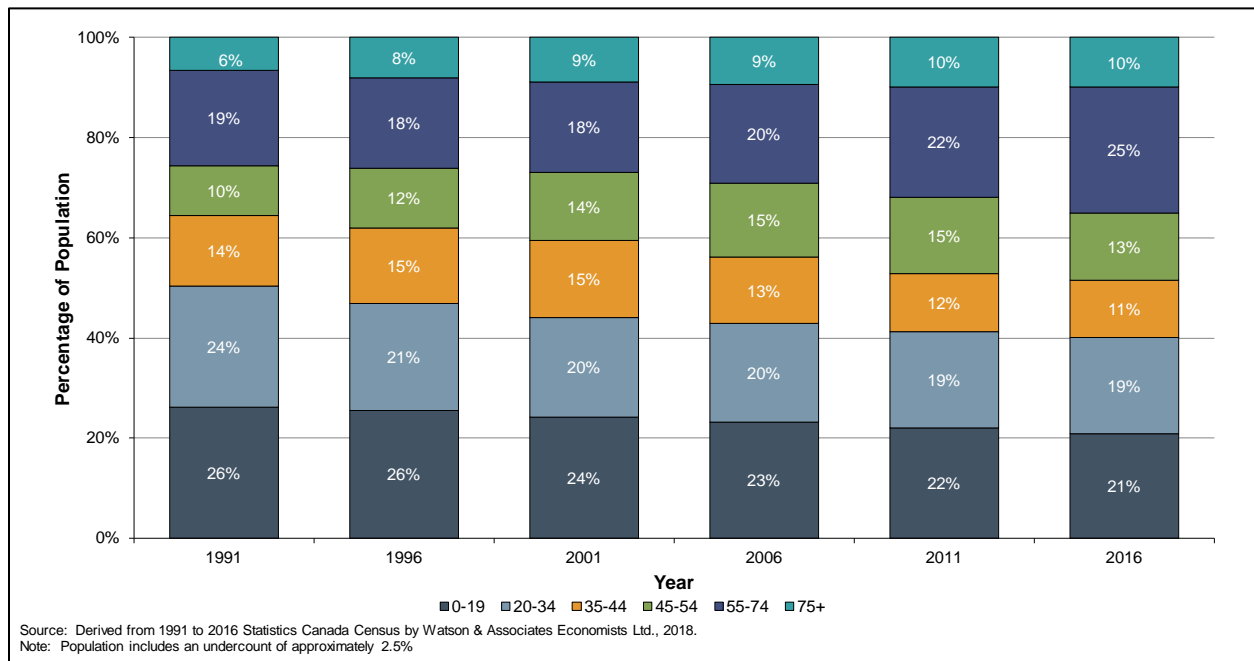
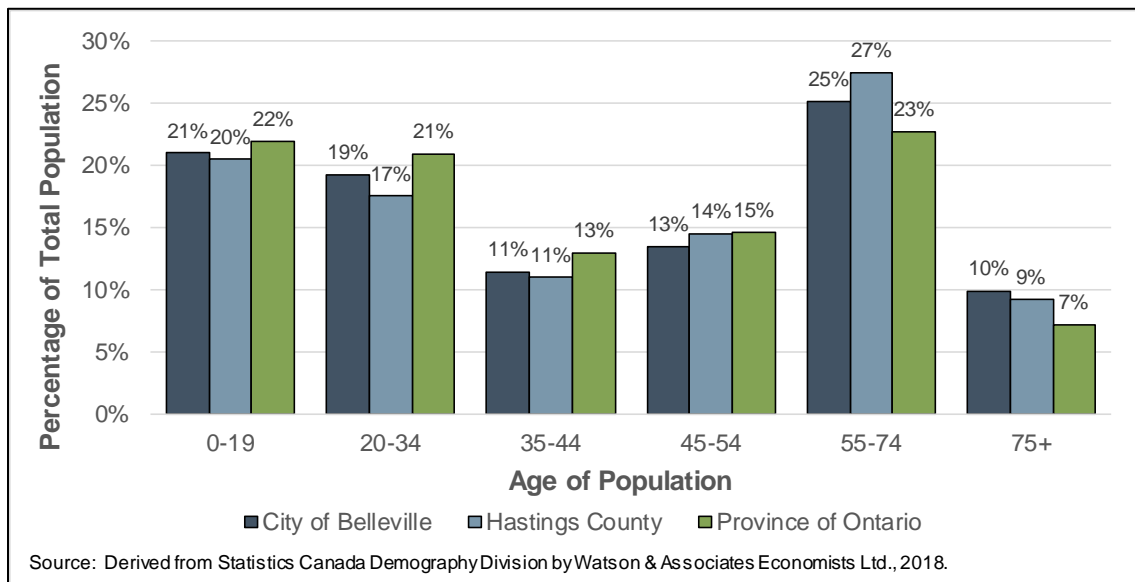


Figure 19
City of Belleville
Population Age Structure Relative to Hastings County
and the Province of Ontario, 2016



Demographic trends strongly influence both housing need and form (i.e. structure type and density). Across the City of Belleville, the population is getting older on average primarily due to the aging of the City's existing Baby Boomer resident base. The first wave of this demographic group turned 70 years of age in 2016. In recent years, the City has also been increasingly attracting new residents from outside Belleville within this age group, as previously discussed.

Not only is the Baby Boom age group large in population, but it is also diverse with respect to age, income, health, mobility, and lifestyle/life stage. Accommodating empty-nesters/seniors is a key planning issue across Ontario municipalities including the City of Belleville, as a growing percentage of the population will reach 75 years of age and older over the next 15 years. The aging of the City's population is anticipated to drive the need for seniors' housing and other housing forms geared to older adults (i.e. assisted living, affordable housing, adult lifestyle housing).

The physical and socio-economic characteristics of the 75+ age group (on average) are considerably different than those of younger seniors, empty-nesters and working-age adults. On average, older seniors have less mobility, less disposable income and typically have increased health issues compared to younger seniors. Typically, these characteristics associated with this age group drive their relatively higher propensity for medium- and high-density housing forms that are in proximity to urban amenities (e.g. hospitals/health care facilities and other community facilities geared towards seniors).

3.3 Review of Recent Housing Trends, City of Belleville

The following section explores housing growth trends for Belleville over the 1991 through 2017 period. This review is based on various data sources from Statistics Canada and the Canada Mortgage and Housing Corporation (C.M.H.C.).

3.3.1 Historical Residential Building Permit Activity by Dwelling Type for the City of Belleville, 2006 to 2017

Figure 20 summarizes residential building permits by unit type for new housing units from 2008 to 2017 for the City of Belleville. Key findings include:

- Over the 2008 through 2017 period, Belleville averaged 193 residential building permits per year;
- During this historical period, development activity was largely dominated by low-density units, accounting for 67% of units, while medium- and high-density housing accounted for 18% and 14% of new units, respectively;
- Belleville experienced a greater average number of annual residential building permit issuances for new units between 2013 to 2017 (220 units) than in the previous (2008 to 2013) 5-year period (160 units); and
- In 2017, the City added 385 new housing units (a 10-year high), comprised of 200 low-density (52%), 60 medium-density (14%) and 130 high-density units (33%).

Figure 20
City of Belleville
Historical Residential Building Permits, 2008 to 2017

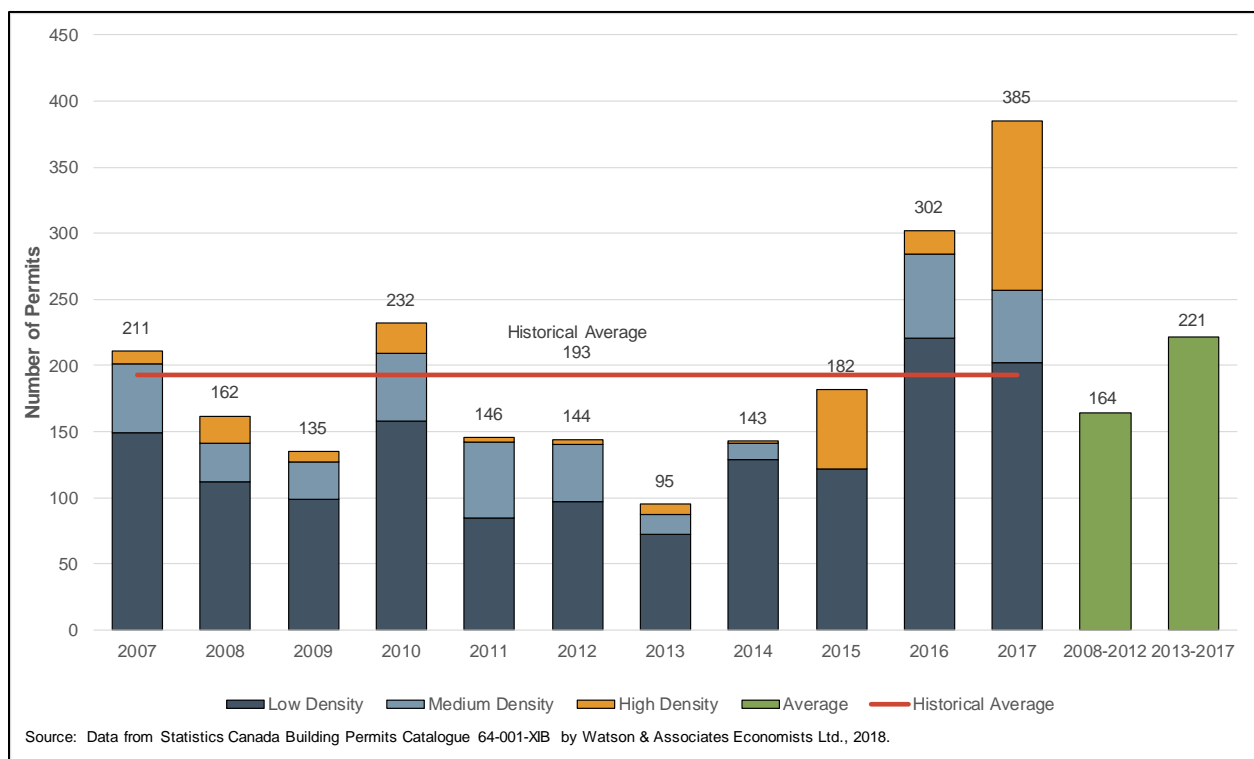
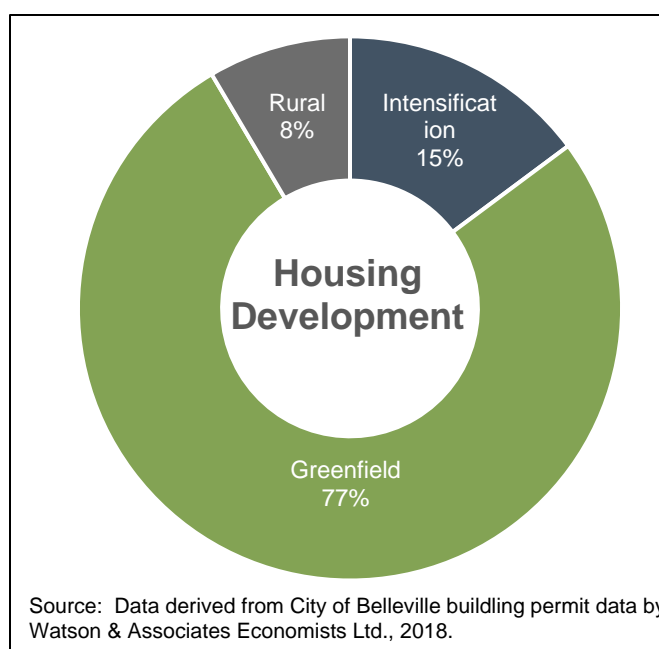


Figure 21 illustrates housing development by location (i.e. greenfield area, intensification and rural area) from 2013 to 2017. Key findings include:

- Greenfield development accommodated 77% of new dwelling units;
- Intensification¹ (development within the City's built-up area) accounted for 15% (164 units) of the total housing development during this period;
- The City Centre area had limited development in this time frame; and
- 8% of residential development over the period was located in the rural area.

Figure 21
City of Belleville
Residential Building Permit Activity by Location, 2013 to 2017



¹ For the purpose of this study, intensification is defined as the City Centre Area.

3.3.2 Residential Building Permit Activity by Structure Type, 2002 to 2016

Figure 22 illustrates the housing growth over the past 15-years by structure type for the City of Belleville. Over this time period:

- Belleville's high-density housing has experienced minimal growth, averaging 6% of the overall new housing stock;
- Low-density housing has seen fluctuations during this time frame. Overall, the share of low-density housing has been gradually decreasing, falling from 79% of the total new housing stock between 2002 and 2005, to 71% from 2012 to 2016; and
- Medium-density housing has shown significant growth over the 2002 to 2016 period. From 2002 to 2005, medium-density housing accounted for 15% of the overall housing growth, compared to 24% over the 2007 to 2016 period.

Figure 22
City of Belleville
Residential Building Permit Activity by Structure Type, 2002 to 2016

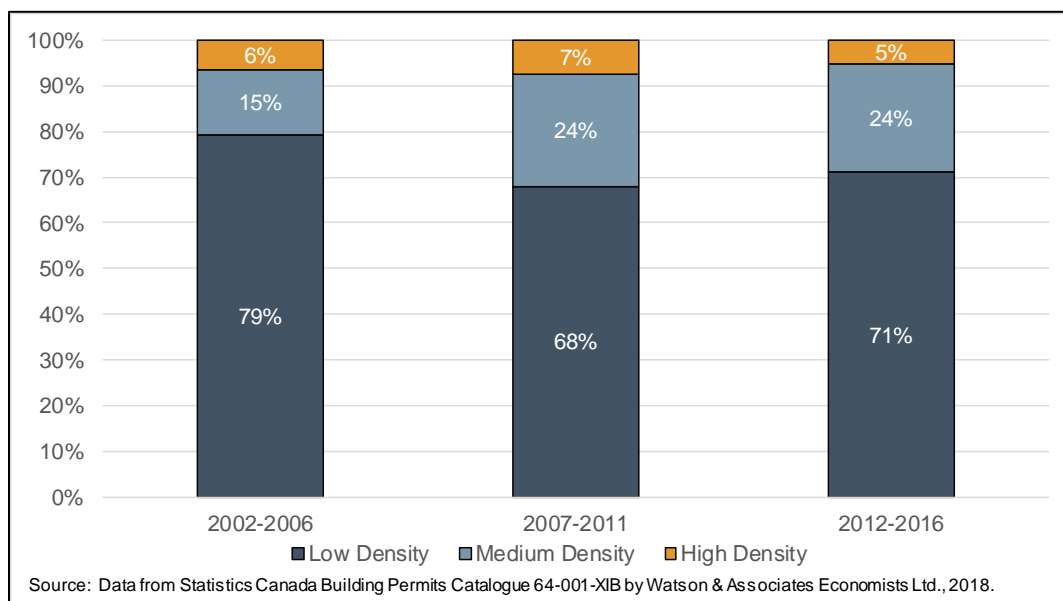


Figure 23 summarizes occupied housing stock for the City of Belleville over the 1991 through 2016 Census period. Figure 24 summarizes annual average housing growth rates for the City in comparison to the provincial average. Key findings include:

- During the 1991 through 2016 period, Belleville's occupied housing stock increased from approximately 17,800 to 21,700 units;
- During this period, the City's housing growth rate was generally lower than the provincial rate, averaging between 0.6% and 1.2% per annum; and
- The City's occupied housing stock grew at an average rate of 0.6% per annum over the past five years, significantly lower than the provincial average of 1.1%.

Figure 23
City of Belleville
Occupied Housing Stock, 1991 to 2016

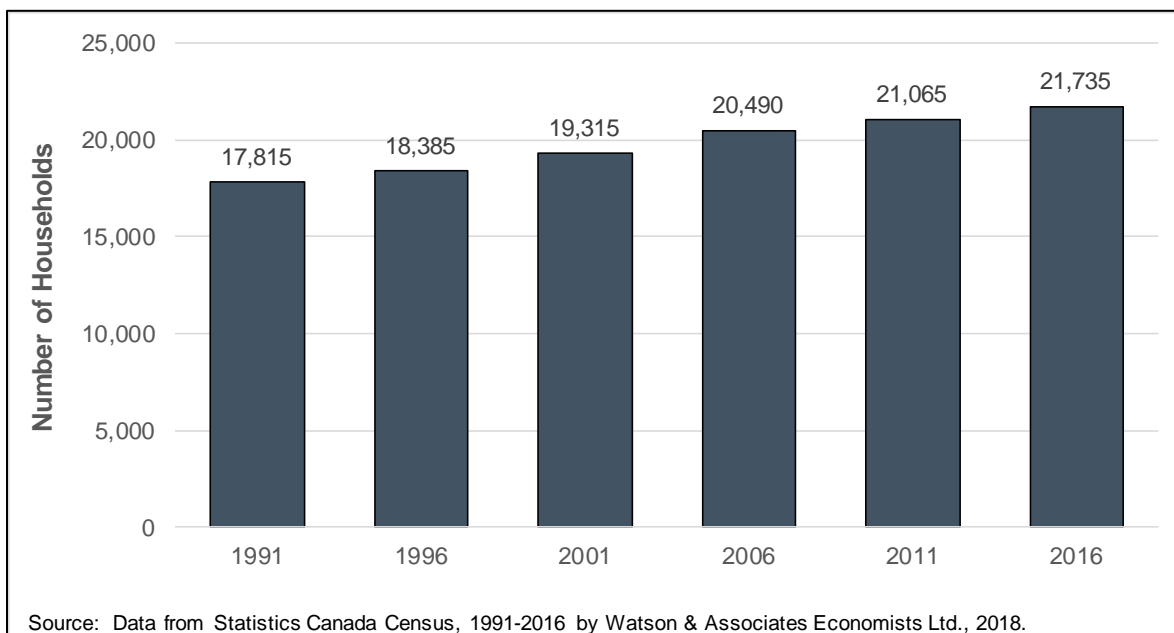


Figure 24
City of Belleville
Average Annual Household Growth, 1991 to 2016

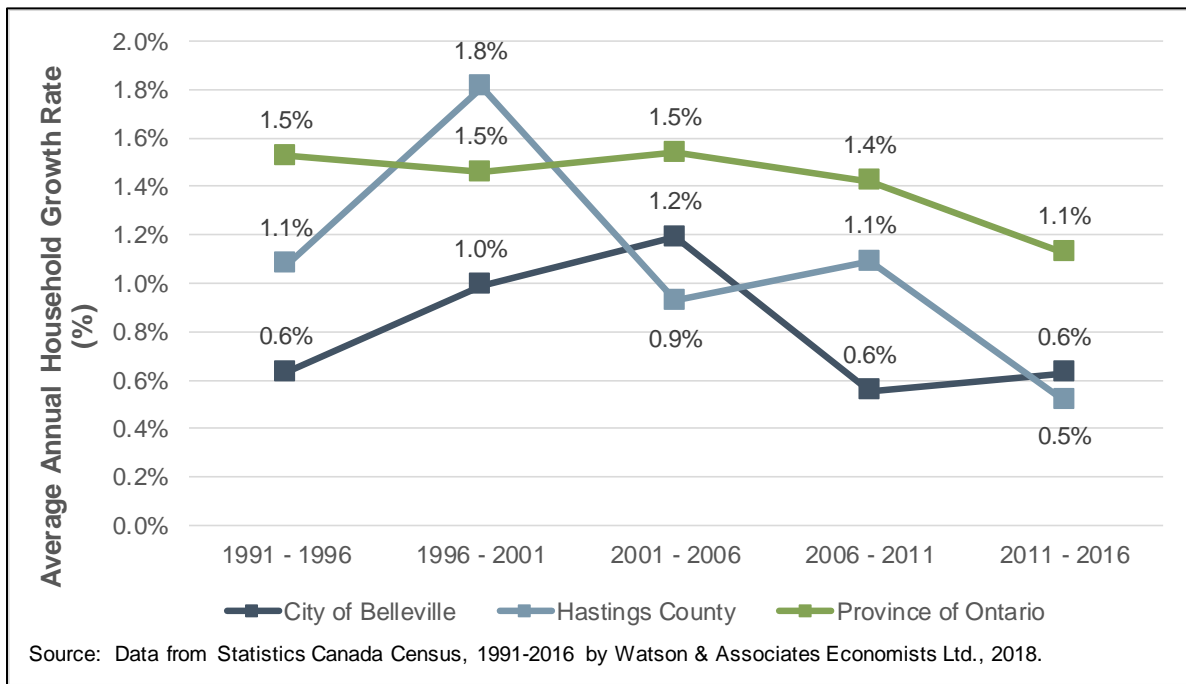
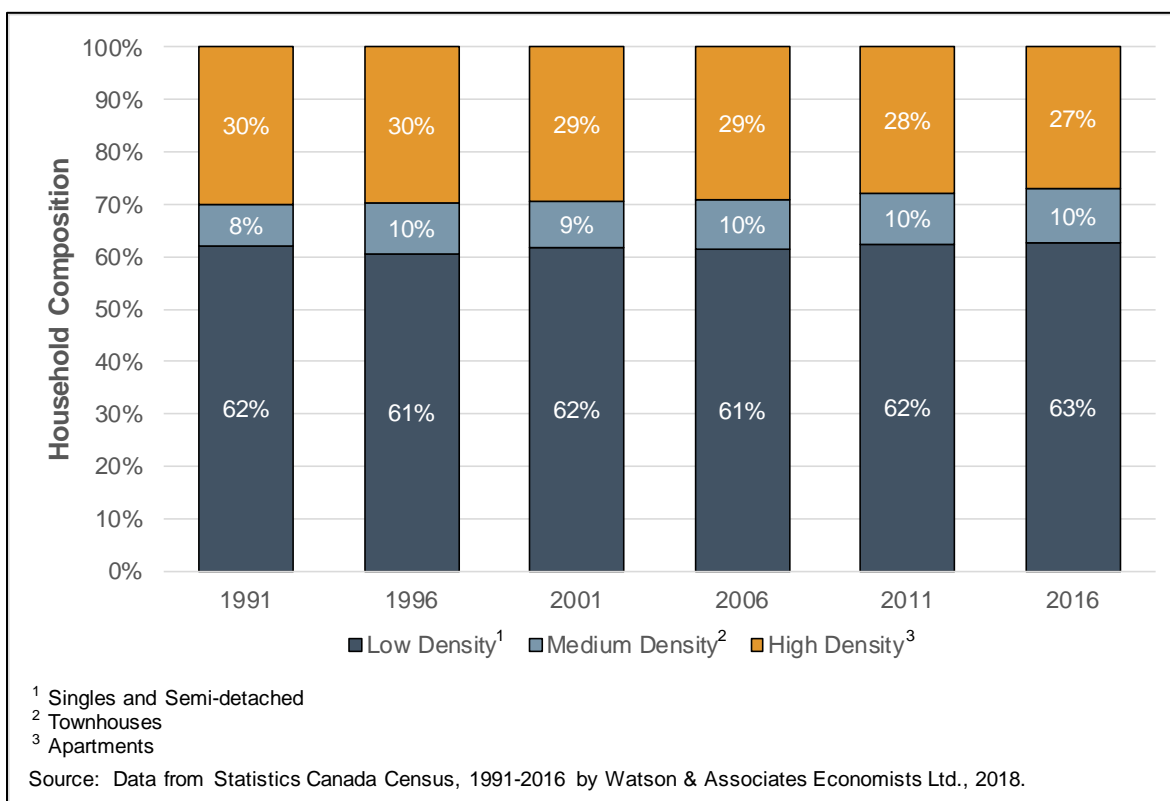


Figure 25 summarizes historical housing trends based on Statistics Canada Census data for the City of Belleville by housing type (i.e. density) from 1991 to 2016. Key observations include:

- Low-density housing (single and semi-detached) is the dominant form of housing in Belleville, representing approximately 63% of the housing stock in 2016. High density (apartments) comprised 27% and medium density (townhouses and row houses) comprised 10% of housing;
- Over the 1991 through 2016 period, the share of low-density housing in Belleville remained largely unchanged (62%); and
- In contrast, the proportionate share of high-density dwellings declined from 30% to 27% during the period, while the share of medium-density housing increased slightly from 8% to 10%.

Figure 25
City of Belleville
Household by Density Type



3.2.3 Housing Headship Rates, 1991 to 2016

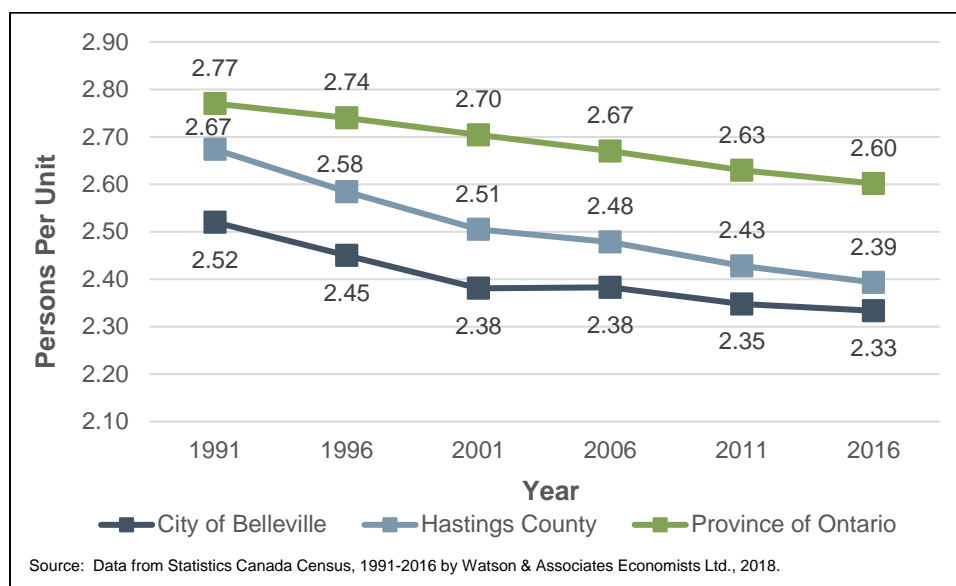
A headship rate is defined as the ratio of primary household maintainers, or heads of households, by major population age group (i.e. cohort). Between 1991 and 2016, the City's total headship rate increased modestly from 0.39 to 0.42 (refer to Appendix A for additional details). An understanding of historical headship rate trends is important because this information provides insights into household formation trends associated with population growth by age. While major fluctuations in headship rates are not common over time, the ratio of household maintainers per capita varies by population age group. For example, a municipality with a higher percentage of seniors will typically have a higher household maintainer ratio per capita (i.e. headship rate) compared to a municipality with a younger population. This is because households occupied by seniors typically have fewer children than households occupied by adults under 65 years of age. Accordingly, forecast trends in population age structure provide important insights into future headship rates and persons per unit (P.P.U.) trends for the City of Belleville.

3.2.4 Persons Per Housing Unit, 1991 to 2016

Figure 26 summarizes average housing occupancy in the City of Belleville, the County of Hastings and the provincial average over the 1991 through 2016 period, expressed as average P.P.U. Key observations include:

- After decreasing steadily between 1991 and 2001, the average P.P.U. in Belleville remained more stable over the 2001 to 2016 period, declining slightly from 2.38 to 2.33; and
- The P.P.U. for the Province declined steadily during the 1991 to 2016 period, declining from 2.77 to 2.60.

Figure 26
City of Belleville
Historical P.P.U. Trends, 1991 to 2016



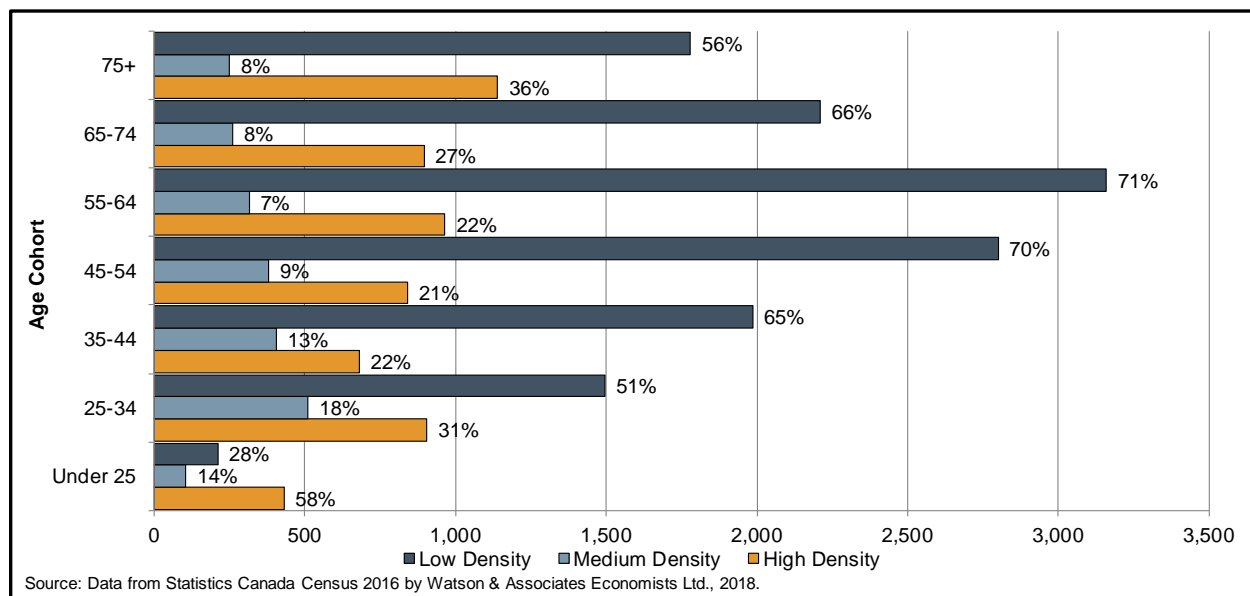
3.2.5 Historical Housing Propensity Trends by Structure Type, 2016

Figure 27 summarizes historical housing propensity trends by structure type for the City of Belleville based on 2016 Statistics Canada Census data. Age-specific propensities measure housing demand by dwelling structure type, by age of household maintainer.

As previously mentioned, population age structure impacts several factors such as income/affordability, lifestyle, family size, lifestyle decisions, health and mobility. In the City of Belleville, propensities for high-density housing (apartments and condominium units) are highest among younger age groups, while propensities for low-density housing (single and semi-detached housing) are highest among population age groups between 35 and 64 years of age.

Figure 27 identifies that the demand for high-density dwellings is highest among those aged under 25. The preference for high-density dwellings is also relatively strong for the 75+ age group. Between 2006 and 2011, housing propensities within the City of Belleville did not change significantly between age groups. For additional information, refer to Appendix C.

Figure 27
City of Belleville
Housing Propensity Trends by Structure Type, 2016



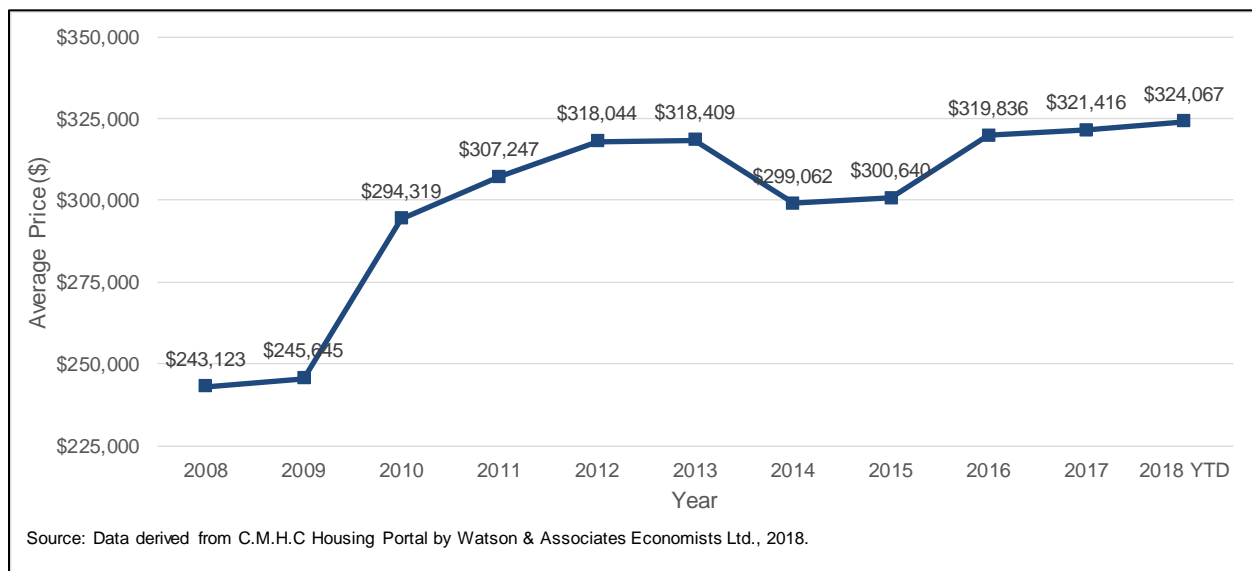
3.2.6 Historical Trends in Housing Prices and Housing Affordability, 2006 to 2016

Economic conditions also play a key role in shaping the rate, form, and location of urban development across the City. In recent years, many south-central Ontario municipalities have experienced a steady increase in housing prices driven by rising land prices, population growth and a recovering regional employment market.

In Ontario, housing appreciation has been strongest within the City of Toronto and the surrounding municipalities within the G.G.H.¹ This trend has resulted in a growing gap in housing prices between municipalities located within and outside the G.G.H. This trend in housing prices between the G.G.H. and the City of Belleville has been an important factor driving local and regional housing demand.

Figure 28 summarizes historical trends in housing prices within the City of Belleville over the 2008 to 2018 period for low-density households. As illustrated below, housing prices have steadily increased for low-density households within the City of Belleville over the past decade, increasing by approximately 33% over the past 10 years.

Figure 28
City of Belleville
Historical Housing Prices, 2006 to 2017



¹ Within the City of Toronto, the average price for a new single detached home in 2016 was \$1,333,000.

3.4 Observations

The City of Belleville's population base increased from 44,900 in 1991 to 50,700 in 2016 at an average annual rate of 0.5% per year, a moderately lower growth rate than the provincial average.

Since 2001, the City's population growth has been driven by net migration of persons over the age of 55 (empty-nesters and seniors). Belleville has also experienced steady net migration of adults (aged 35-54 years) and children (aged 0-19 years). Belleville's population is older (i.e. higher average age of population) than the provincial average and it is aging at a faster rate than the provincial average.

Average household size in Belleville is lower than the provincial average and the City of Belleville has experienced a steady decline in average housing occupancy since 1991, similar to provincial trends. Belleville's existing housing stock is dominated by low-density built form, with approximately 60% consisting of single and semi-detached units. The City's housing mix remained relatively unchanged during the 1991 through 2011 period, though recent housing development activity indicates a larger demand for medium-density units.

There are two major demographic factors driving housing demand in Belleville. This includes families that are attracted to Belleville for competitively priced housing/availability of low-density housing and the demand for housing from the 55+ age cohort. Over the past three years, residential building permit activity (new units only) has increased significantly within the City of Belleville relative to longer-term historical averages, driven by demand across all housing types. This trend is anticipated to continue over the short term, primarily fueled by the 55+ population. Over the long term, the rate of population and housing growth is anticipated to moderate relative to short-term trends as a result of the regional labour force and local population base.

There is strong preference for low-density housing in Belleville by households headed by individuals at most stages of life, including young adults (aged 25-34 years), mid-life (aged 35-54 years), empty-nesters (aged 55-64 years) and young seniors (aged 65-74 years). This preference decreases with age and can be attributed to housing affordability, health and mobility issues. High-density housing is also the dominant built form preference for individuals under 25 years of age, which is largely attributed to affordability and lifestyle issues.

4. Policy Context

4.1 Introduction

The *Planning Act* is the enabling legislation that guides planning and development in Ontario. It enables the creation of O.P.s, which are comprehensive documents that address how a community will grow to meet its needs and provides a framework for reducing land-use conflicts. O.P.s contain goals, objectives and policies to manage and direct change and consider the effects on the social, economic, built and natural environment. They are the municipality's primary means to control development to ensure it is directed towards appropriate locations so that it does not occur haphazardly, which may create land-use conflicts, higher servicing costs, and environmental degradation.

To provide guidance for O.P.s the *Planning Act* also enables the Provincial Policy Statement (P.P.S.). The P.P.S. is a statement of the Province's policies concerning land-use planning and it is intended to support an integrated, long-term approach to planning, and address inter-relationships between environmental, economic, and social factors. It provides direction on all land-use decisions in Ontario on matters of provincial interest, and O.P.s must be in conformity with all policies included in the P.P.S.

4.2 A Changing Policy Framework

4.2.1 *The Planning Act*

The *Planning Act* is occasionally amended by Bills brought through the Ontario legislature. In recent years, Bill 73 and Bill 139 have included notable changes that will be considered throughout the course of this project.

Smart Growth for Our Communities Act

Bill 73, the *Smart Growth for Our Communities Act*, 2015, came into effect in December 2015 and impacted both the *Development Charges Act* and the *Planning Act*. Changes that came into effect as a result of the passing of this Bill included the following:

- O.P.s must now include a description of measures and procedures for informing and obtaining views of the public on O.P.A.s, zoning by-laws, plans of subdivision and consents;

- Municipalities must provide a copy of the proposed O.P.s/O.P.A.s to the Ministry of Municipal Affairs and Housing (M.M.A.H.) at least 90 days prior to giving notice of a public hearing;
- New O.P.s are only required to be reviewed after 10 years (i.e., repeal and replacement of an existing O.P.); however, the 5-year cycle continues to apply to plans being updated;
- Built form was added as a new provincial interest, whereas it previously was not specifically included as a listed provincial interest, and O.P.s must contain policies related to the built environment;
- Although municipalities are still encouraged to keep their employment policies and land designations up-to-date, there is no longer a requirement that they are revised during an O.P. update;
- Municipal second unit policies cannot be appealed at the time of an O.P. update;
- An entire new O.P. can no longer be appealed;¹ and
- Applications to amend a new O.P. (or zoning by-law) will not be permitted for 2 years after adoption, unless supported by the municipality.²

Building Better Communities and Conserving Watersheds Act

Bill 139, the *Building Better Communities and Conserving Watersheds Act, 2017* came into effect on April 3, 2018. It affected the Province's appeal body, initiating a transition from the Ontario Municipal Board (O.M.B.) to the new Local Planning Appeal Tribunal (LPAT). As a result, practices and procedures for appeals have changed; however, many provisions in the new Act and the old Act are substantively the same.

Additional changes that came into effect as a result of the passing of Bill 139 include:

- Appeals are no longer permitted for provincially approved O.P.s and O.P. updates.
- The grounds for appeal have been restricted to matters of consistency and/or conformity with provincial and/or local plans and policies;
- Applications to amend a new secondary plan are not permitted for 2 years after adoption, unless supported by the municipality;
- Interim control by-laws cannot be appealed for one year;

¹ & ² Note that these were further modified in Bill 139.

- The municipality now has 210 days (changed from 180 days) to make decisions on O.P.s and O.P.A. The approval authority's timeline for decisions has also been extended from 180 to 210 days; and
- Municipal policies that support appropriate development around protected major transit station areas are no longer appealable.

In addition to the changes noted above, Bill 139 introduced a requirement for support of climate change action by requiring climate change mitigation and adaptation policies to be included in O.P.s:

“An official plan shall contain policies that identify goals, objectives and actions to mitigate greenhouse gas emissions and to provide for adaptation to a changing climate, including through increasing resiliency.”

This supports the *Modernizing Ontario's Municipal Legislation Act* (Bill 68), which was passed in 2017 and amended the *Ontario Municipal Act, 2001* to include “the mitigation of greenhouse gas emissions and adaptation to a changing climate” as a matter of provincial interest.

4.2.2 The Provincial Policy Statement

The *Planning Act* requires the P.P.S. to be reviewed every 10 years (changed from a 5-year review cycle as part of Bill 73); the most recent P.P.S. was released in 2014. The 2014 update reflected a wide range of input received during consultation which occurred in 2010 and 2012 in regards to the review of the previous 2005 P.P.S. The 2014 P.P.S. addresses the key areas that were identified as needing revisions, which were: the better integration of economic, social and environmental considerations; addressing rural and northern challenges; providing better support for implementation; and providing direction for emerging issues.

The updated policies are intended to support more sustainable patterns of development and resource use and are founded on the following core principles:

Our land is finite and valuable – We need to use it wisely

Our resources are finite and valuable – We need to manage them wisely

All Ontarians deserve strong and healthy communities.

There were several notable changes in the 2014 P.P.S. that reflect changing understanding and attitudes towards the management of land in Ontario. Policy areas that incurred substantive changes include:

- Healthy, Active Communities;
- Northern and Rural Communities;
- Economy and Employment;
- Infrastructure;
- Servicing;
- Climate Change;
- Natural Heritage, Wetlands and Water;
- Agriculture;
- Mineral Aggregate Resources;
- Natural Hazards;
- Aboriginal; and
- Integration and Implementation.

4.2.3 Consistency in Official Plans

Municipalities play an important role in land-use planning in the Province as they are the ones primarily in charge of implementing the policies set out in the P.P.S. that are the foundation of Ontario's land-use planning system. The *Planning Act* requires municipalities to review their existing O.P.s every five years to ensure conformity to the P.P.S. Regular updates help to keep the document current on an ongoing basis and allow municipalities to ensure that their plan reflects changing circumstances or new priorities for resource protection, growth or redevelopment. Updates are intended to ensure that assumptions underpinning plans are still valid, that they reflect any changes to guiding legislation, that they address changing municipality priorities, that they consider whether policies are being carried out and consider whether policies are having the intended outcome.

4.3 City of Belleville Official Plan

The City of Belleville's current O.P. was adopted pursuant to By-law 2001-98 and was approved by M.M.A.H. in January of 2002. In 2014, M.M.A.H., through a coordinated interministry review, evaluated updates to the 2002 O.P. that were completed as part of an earlier review. As previously discussed, the guiding legislation has undergone significant changes since the last update to the City's O.P. The update that was provided to M.M.A.H. for review was written in the context of the 2005 P.P.S.; therefore, there are significant areas within the 2002 O.P. that require updates to be in conformity with the current *Planning Act* and P.P.S. The M.M.A.H. provided recommendations and comments in general policy areas as well as in regards to specific policies, and other

technical matters. Some comments also indicated the need for additional study/planning exercises that should be completed to support policy development for the municipality.

4.3.1 General Comments from M.M.A.H.

The following provides a summary of the general recommendations received in 2014 from M.M.A.H. through their coordinated interministry review in regards to the City of Belleville O.P. Review. Please note that no plan update occurred as a result of the 2014 review, and that the comments received from M.M.A.H. will need to be addressed in the current review.

1. Identify and delineate a Natural Heritage System (N.H.S.) in Ecoregion 6E and add a policy to indicate the approach, and references to relevant natural heritage features, areas and linkages of the N.H.S. and policies related to each of those components. A policy section should also be added to address the protection of linkage areas and provide direction for how to avoid/mitigate impacts.
2. Identify and depict mineral aggregate resources and include a policy specifying the approach the City will take to prioritize and protect aggregate resources.
3. Reflect Minimum Distance Separation (M.D.S.) Formulae/Guidelines that were updated in 2007.
4. Add policies and a schedule reflecting the 2015 Source Protection Plan for the Quinte region with reference to vulnerable areas associated with two municipal drinking water systems within the City.
5. Add policies to identify and protect petroleum resource operations, resources and deposits, as well as the addition of a reference to available online mapping.
6. Add language to address development on, or abutting, human made hazards.
7. Address P.P.S. requirement that development is to be directed away from areas at risk of wildland fire.
8. Add policies that address the phasing of development to reflect intensification and redevelopment targets and ensure the orderly progression of development in greenfield areas.
9. Include appropriate targets for the provision of affordable housing.

10. Add policy to indicate that planning authorities may only allow lot creation where there is confirmation of municipal servicing sufficient capacity.
11. Add policy wording and mapping in regards to operating and former waste management sites.
12. Add known karst areas to schedules as a natural hazard category.
13. Identify how the lands included in the Loyalist Secondary Plan are intended to develop based on updates to growth and demographic work.
14. Clarify servicing and natural heritage policies as some contradict or do not fully address P.P.S. requirements.

4.3.2 Specific Comments from M.M.A.H.

The following provides an overview of some of the comments received from M.M.A.H. through their interministry review that relate to specific items to be addressed:

- Recommended addition of cross-references:
 - Indicate when a comprehensive review is required (e.g. to add urban designated lands);
 - Provide information regarding the permitting of individual on-site services and Ministry of Environment and Climate Change (M.O.E.C.C.) approvals; and
 - Cross reference servicing and natural heritage sections of the plan.
- Address issues regarding agricultural areas:
 - Update the list of permitted uses;
 - Add minimum lot sizes for consents for new lot creation;
 - Remove unnecessary provisions that are implemented under other legislation, or replace them with references to applicable provincial standards/requirements; and
 - Remove limitations of ability of agricultural uses to continue.
- Reflect updates to environmental requirements:
 - Reflect Quinte Conservation requirements in regards to development within 30 metres from a watercourse and development within floodplains;
 - Address non-provincially significant coastal wetlands;
 - Update wetland and natural heritage feature mapping;

- Reflect changes to treatment of endangered and threatened species habitat;
- Identify the criteria used for identifying significant woodlands;
- Identify how significant valleylands will be identified and protected;
- Add policies that outline the Environmental Impact Studies. process and describe the extent of requirements that may be required;
- Revise permitted uses in Recreation Commercial Land Use designation;
- Add of separation distances and/or other control measures for sensitive land uses close to sewage treatment facilities and waste stabilization ponds;
- Identify Industrial Land Use as Employment Lands as per P.P.S. s.1.3.2 and include associated policy direction;
- Change name of 5 “special policy areas” as that term is not consistent with Special Policy Areas as defined in the P.P.S.;
- Remove policies limiting expansion of aggregate operations;
- Reflect updates to *Planning Act* provisions that allows garden suites to be permitted for 20 years;
- Add best practices regarding heritage conservation;
- Provide additional definitions; and
- Edit policy wording to clarify or strengthen intent, or otherwise increase consistency with the P.P.S.

Note that this list is not exhaustive and that these items will be discussed in greater detail in Phase two of the project.

4.3.3 Technical Revisions

In addition to updates to address consistency with the 2014 P.P.S., there are several technical revisions to make to the O.P. to modernize the language in accordance with changes to other relevant legislation and contemporary planning terminology (see examples below). These items will be addressed in greater detail in the subsequent phase of the project.

Modernization of terminology:

- “Single family detached dwelling” (s.3.10.1) and “Two-family dwelling” (s.3.10.2)
 - Update recommended: the word “family” to be replaced with “unit”

- “provide for pedestrian security, convenience and amenity with special considerations for the disabled” (s.8.2.a) – Of working copy submitted to Ministry for review)
 - Update recommended: “disabled” to be replaced with “people with disabilities”
- Educational Facilities (s.5.8 b) and c)): Public and private schools listed separately
 - Update recommended: Removal of distinction between ownership of schools.

Consistency of terminology in keeping with other relevant Acts/ministries:

- Consistency with the *Ontario Heritage Act* (O.H.A.)
 - Items such as “historical significance,” “architectural merit” and “contextual importance,” etc.
 - Update recommended: Terms to be replaced with “cultural heritage resources”
 - “Known to be”
 - Update recommended: Phrase to be replaced with “known to contain”
- Changes to ministry names:
 - The Ministry of Natural Resources has been changed to The Ministry of Natural Resources and Forestry
 - The Ministry of Environment has been changed to The Ministry of Environment and Climate Change.

4.4 Loyalist Secondary Plan

Secondary plans are considered part of an O.P. that are added by way of amendment. They contain policies and land-use designations that provide greater detail in respect to a portion of a municipality. Belleville’s Loyalist Secondary Plan, adopted in 2010, will also need to be updated to reflect the aforementioned changes. Concurrent with the O.P. update, the secondary plan will need to be updated to indicate how lands are intended to develop based on updated growth and demographic work completed as part of this review, considerations of long-term infrastructure planning, and will need to be updated to reflect the 2014 P.P.S. and other relevant changes to enabling legislation. If there are areas in the Loyalist Secondary Plan that are not suitable for development and the municipality wishes to orient growth in a different direction resulting in changes to

Belleville's settlement area boundary, then it will have to meet the policy tests in s.1.1.3.8 of the P.P.S.

4.5 Conclusion

All decisions affecting land-use planning matters in the Province must be consistent with provincial planning legislation and the P.P.S. As there have been changes to the *Planning Act* and substantive changes to the P.P.S. since the adoption of Belleville's current O.P., there are several policy areas which will need to be addressed to ensure the plan is consistent with guiding legislation. In the second phase of this project, a "comment-and-response" matrix format will be used to provide a concise and streamlined approach to formulating and evaluating policy direction. This will identify all of the relevant policy issues and provide our analysis side-by-side with the issues/concerns. Alongside that, our further recommendation on the policy direction to be taken will be provided.

5. City of Belleville Residential and Non-Residential Land Supply

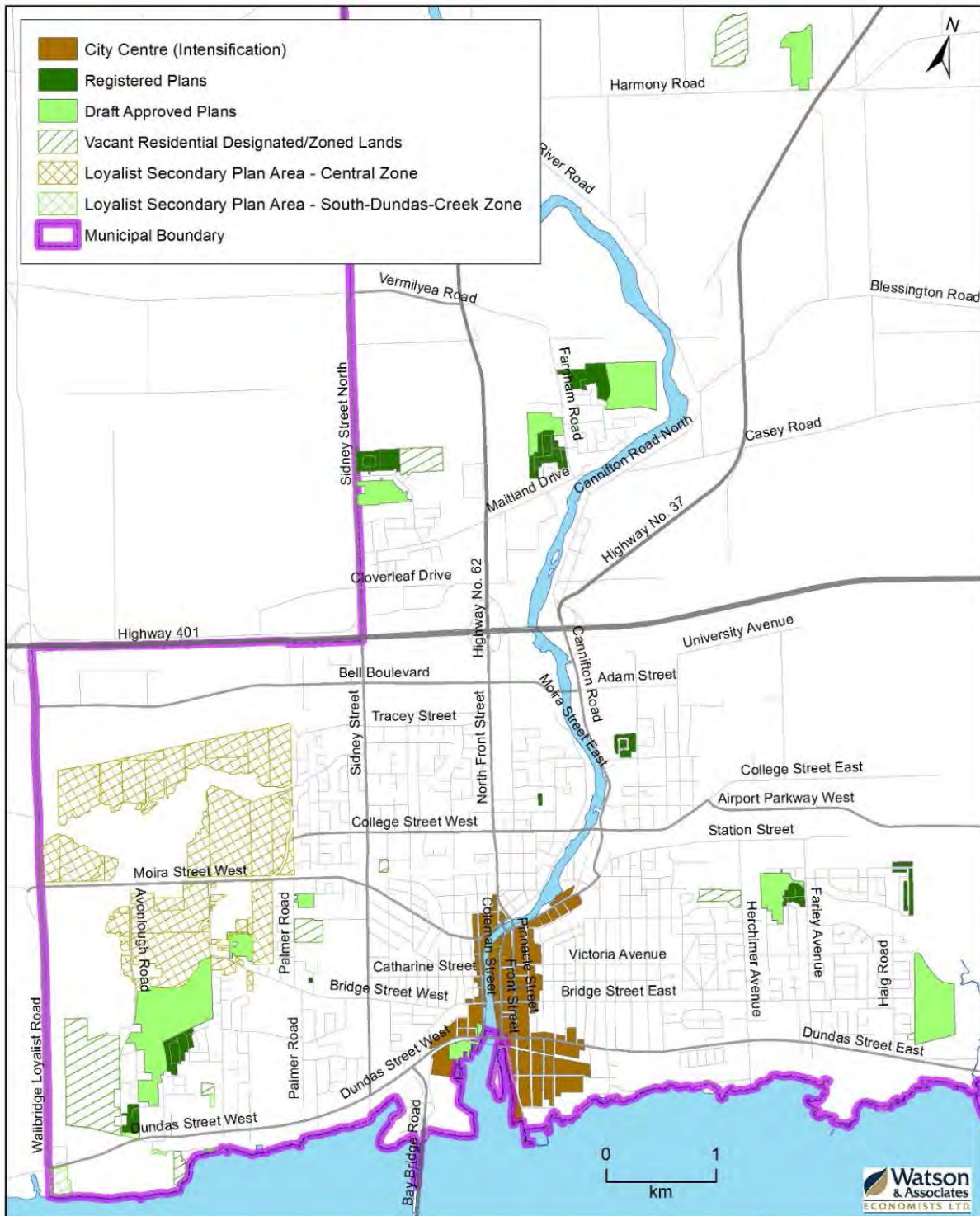
5.1 Introduction

This Chapter summarizes the City's potential to accommodate future housing and employment growth within its designated urban areas and remaining rural lands. With respect to the City's designated urban residential areas, future residential development opportunities are summarized by active development applications, vacant designated greenfield areas and intensification opportunities. Consideration has also been given to the City's ability to accommodate future non-residential growth on designated commercial, institutional and employment lands as well as through non-residential intensification.

5.2 Future Housing Supply Opportunities

The following section assesses the City of Belleville's capacity to accommodate future housing growth, including opportunities for residential intensification. The City has vacant residential units in the form of registered subdivisions (remaining to be built) and subdivisions that are draft approved. In addition, potential units can be accommodated through residential intensification, primarily infill and longer-term redevelopment opportunities. The City also has vacant designated residential lands (i.e. greenfield lands) that can accommodate future housing growth. These housing supply opportunities are illustrated in Figure 29, and discussed herein.

Figure 29
City of Belleville
Residential Supply Opportunities



5.2.1 Housing Supply in Development Approvals Process

The City's residential units in the development approvals process (registered un-built and draft approved), as of December, 2017, within the urban and rural area, are presented in Figure 30 (a more detailed listing provided in Appendix A). Collectively, these supply opportunities represent the majority of the City's short-to medium-term development opportunities. Key observations include:

- Belleville has a total of approximately 2,155 residential units in the development approvals process, of which 2,114 (98%) are within the urban area and 40 units (2%) are within the rural area;
- Within the urban area, 370 units (18%) are within registered plans of subdivision/condominium and 1,744 (82%) are draft approved; and
- Of the total units in the development approvals process, 1,002 (47%) are low density (single detached and semi-detached), 518 (24%) are medium density (townhouses) and 634 (29%) are high density (apartments). All of the medium- and high-density units are located within the City's urban area.

Figure 30
City of Belleville
Residential Units in the Development Approvals Process

	Low Density ¹	Medium Density ²	High Density ³	Total
Urban				
Registered Unbuilt	231	91	48	370
Draft Approved	731	427	586	1,744
Total Urban	962	518	634	2,114
Rural				
Registered Unbuilt	24	0	0	24
Draft Approved	16	0	0	16
Total Rural	40	0	0	40
TOTAL	1,002	518	634	2,154
Housing Mix	47%	24%	29%	100%

Source: Derived from City of Belleville Residential Land Supply data (as of December, 2017) by Watson & Associates Economists Ltd.

1. Reflects singles, semi detached, 2. Reflects townhouses, 3. Reflects apartments

5.2.2 Residential Intensification Potential

In accordance with section 1.1.3.3 of the 2014 P.P.S., this section focuses on the residential intensification potential within the City of Belleville. Belleville offers potential opportunities for residential intensification, largely within the City Centre. To a lesser extent, additional residential intensification opportunities also exist on vacant lots within the remaining built up area, outside of the downtown area (i.e. mature neighbourhoods); however, development potential is considered to be minimal.

In response to direction from the P.P.S., this analysis focuses on the identification of potential intensification sites within the City Centre, beyond those identified in the development approvals process. This assessment builds on and updates on the findings of the City Centre Intensification Plan, prepared by RFA Planning Consultants Inc. in 2012. Though a significant amount of supply opportunities has been identified, it is expected that only a portion of these sites will be absorbed over the forecast period, in accordance with forecast market demand. Anticipated residential intensification demand within the City Centre is discussed in Chapter 8.

Figure 31 summarizes the residential intensification opportunities within the City Centre. Key findings include:

- Total residential intensification supply potential within the Belleville City Centre is estimated at approximately 2,350 units;
- Of the supply potential identified, 83% is high density (apartments and condominiums) while 17% is medium density (townhouses and stacked townhouses); and
- Housing supply opportunities are concentrated in Riverview, the Flats, West Village and the Village.

Figure 31
City of Belleville
Residential Intensification Supply Opportunities within City Centre

	Low Density ¹	Medium Density ²	High Density ³	Total	Share of Total
Village	0	24	378	402	17%
Flats	0	12	340	352	15%
West Village	0	157	267	424	18%
Riverview	0	71	755	826	35%
Church	0	0	108	108	5%
East Gate	0	0	103	103	4%
Downtown Bayshore	0	134	0	134	6%
Total	0	398	1,951	2,349	100%
Housing Mix	0%	17%	83%	100%	

Source: Derived from City Centre Intensification Plan, 2012 by Watson & Associates Economists Ltd. Adjusted for recent development activity (2012-2017) and sites that are in development approvals.

1. Reflects singles, semi detached, 2. Reflects townhouses, stacked townhomes 3. Reflects apartments

5.2.3 Development Opportunities in Proposed Plans and Vacant Designated Residential Lands

The City's future housing supply potential also includes an inventory of vacant designated lands which are currently not active in the development approvals process (i.e. greenfield lands) as well as proposed plans which are not yet draft approved. Estimates of housing yields for each site were provided by City of Belleville staff and are summarized in Figure 32 (a complete listing is provided in Appendix B). Housing potential within remaining designated residential lands that are currently serviceable in the Loyalist Secondary Plan area, which consists of lands south of the creek, are also included. Key observations include:

- City's designated vacant residential lands (excluding draft approved and registered unbuilt lots) can accommodate a total of approximately 1,488 housing units, of which 35% are low density, 21% are medium density and 45% are high density; and
- Of the total supply, 98% (1,488 units) are within the urban area.

Figure 32
City of Belleville
Residential Development Potential on Vacant Designated Lands

	Low Density ¹	Medium Density ²	High Density ³	Total
Urban	500	311	677	1,488
Rural	23	0	0	23
TOTAL	523	311	677	1,511
Housing Mix	35%	21%	45%	

Source: Derived from City of Belleville Residential Land Supply data (as of December, 2017) by Watson & Associates Economists Ltd.

1. Reflects singles, semi detached, 2. Reflects townhouses, 3. Reflects apartments

5.2.4 Development Opportunities in the Loyalist Secondary Plan Area Central Zone

The Central Zone of the Loyalist Secondary Plan Area, located between the hydro corridor and the creek, offers significant opportunities for accommodating residential development. Based on a comprehensive G.I.S.-based parcel analysis and data provided from the City's planning department, the housing potential on greenfield lands within the Central Zone of the Loyalist Plan Area was inventoried, as summarized in Figure 33. The housing yield within the Loyalist Secondary Plan Central Zone Area totals approximately 3,605 units, of which 1,955 are low density units, 1,355 units are medium density and 300 units are high density.

Figure 33
City of Belleville
Loyalist Secondary Plan Area Central Zone Residential Development Potential

Location	Housing Type			Total
	Low Density ¹	Medium Density ²	High Density ³	
Potters Creek North of Creek ⁴	260	180	40	480
Other Greenfield Lands ⁵	1,695	1,170	260	3,125
Central Zone Total	1,955	1,350	300	3,605

1. Reflects singles, semi detached, 2. Reflects townhouses, 3. Reflects apartments

4. Total housing estimated provided by City of Belleville Planning Department. Housing mix estimated by Watson & Associates Economists Ltd.

5. Derived from GIS-based parcel data by Watson & Associates Economists Ltd. Assuming a 65% net to gross ratio and a unit mix and density consistent with current trends. Refer to Appendix A for further details.

5.2.5 Total Housing Supply Potential

Urban Housing Supply Opportunities by Planning Status and Location

Figure 34 summarizes Belleville's potential to accommodate new housing development (summarized in housing units) by urban and rural area. Figure 35 illustrate the potential housing supply within the urban area by housing density and status, respectively.

- Belleville's housing supply potential totals approximately 9,619 units, of which 9,556 (99%) are located within the urban area and 63 units (1%) are situated in the rural area;
- Of the housing supply, 36% are low density, 27% medium density and 37% high density;
- The Loyalist Secondary Plan Central Zone accounts for 38% of housing supply opportunities identified within the urban area. In comparison, intensification opportunities within the City Centre account for 25%, followed by units in the development approvals process (22%), and development opportunities on designated vacant residential lands (15%).

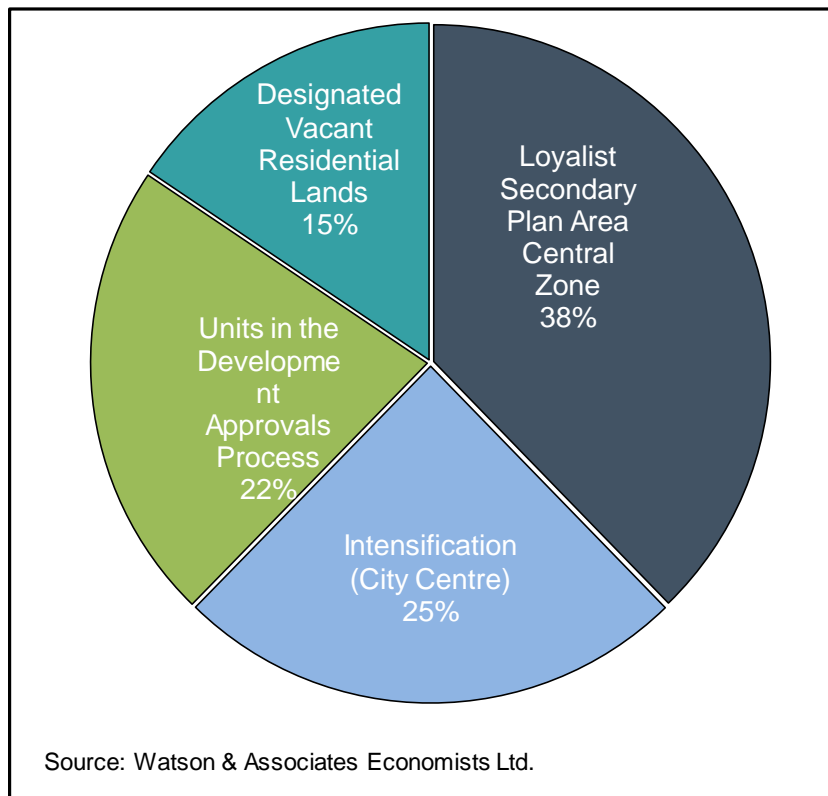
Figure 34
City of Belleville
Total Housing Supply Potential

Type/Location	Low Density ¹	Medium Density ²	High Density ³	Total	Proportionate Share of Total
Urban					
Units in the Development Approvals Process	962	518	634	2,114	22%
Intensification (City Centre)	0	398	1,951	2,349	24%
Designated Vacant Residential Lands	500	311	677	1,488	15%
Loyalist Secondary Plan Area Central Zone	1,955	1,350	300	3,605	37%
Urban Total	3,417	2,577	3,562	9,556	99%
Rural					
Units in the Development Approvals Process	40	0	0	40	< 1%
Designated Vacant Residential Lands	23	0	0	23	< 1%
Rural Total	63	0	0	63	1%
TOTAL	3,480	2,577	3,562	9,619	100%
Housing Mix	36%	27%	37%	100%	

Source: Watson & Associates Economists Ltd.

1. Reflects singles, semi detached, 2. Reflects townhouses, 3. Reflects apartments

Figure 35
City of Belleville
Urban Area Housing Supply by Status



Urban Housing Supply Opportunities within the Built-Up Area and Greenfield Areas

The City has a total potential housing supply of approximately 7,205 units within the urban area, excluding the intensification potential identified within the City Centre, as illustrated in Figure 36. Of this, 93% (6,690 units) represents greenfield development opportunities and 7% (515 units) signifies development opportunities within the built-up area through infill of vacant designated lands and units in the development approvals process.

Figure 36
City of Belleville
Urban Area Housing Supply within Built Up Area and Greenfield Areas

Type/Location	Low Density ¹	Medium Density ²	High Density ³	Total	Proportionate Share of Total
Greenfield Development	3,413	2,174	1,104	6,691	93%
Within Built Up Area	4	5	507	516	7%
Urban Total	3,417	2,179	1,611	7,207	100%

Source: Watson & Associates Economists Ltd.

1. Reflects singles, semi detached, 2. Reflects townhouses, 3. Reflects apartments

Note: Excludes intensification opportunities identified within the City Centre.

5.3 Vacant Employment Land Supply

The City's vacant employment land inventory was developed from the City's vacant industrial lands mapping layer and refined using G.I.S.-based mapping software with various mapping overlays, including O.P. designations and orthophotos. Vacant designated employment lands were identified as those which fall under the O.P. designation of "industrial" and are located within the urban area illustrates the geographic location of the City's vacant designated employment lands. As shown in Figure 37, the City's vacant designated employment lands are categorized into two distinct classes – those which are considered serviceable and developable within the forecast period, and those which are not considered developable over the forecast period.¹ The vacant designated employment lands which are considered non-developable over the forecast period were brought into the Urban Serviced Area with the City's amalgamation with the Township of Thurlow and are currently unserviced and not considered serviceable within the forecast period.

Figure 38 summarizes the total gross and net vacant employment lands supply for the City of Belleville (as of 2018) by employment area. As illustrated, the City has a total of 554 gross ha (1,369 gross acres) of vacant employment land. In determining the net vacant land inventory, downward adjustments were made to reflect environmentally sensitive lands/environmental features and internal infrastructure (i.e. roads, stormwater ponds, easements, etc.), where applicable.

The environmental takeouts were based on the Environmental Protection (EP) Lands layer as delineated in Schedule B of the City's O.P. Larger vacant parcels (i.e. 4 ha or greater) were also subject to an additional downward adjustment to reflect internal infrastructure with a net to gross adjustment of 75%. In accordance with the aforementioned adjustments for internal infrastructure and environmentally sensitive/constrained lands, the City's net developable employment lands supply is estimated at 475 net ha (1,174 net acres).

¹ The non-developable vacant designated employment lands reflect 140 gross ha (excluding environmental features) located north of Highway 401 and east of Highway 37. The review of these lands is further discussed in Section 9.8, Potential Employment Land Exchange.

Figure 37
City of Belleville Urban Area
Vacant Designated Employment Land Supply

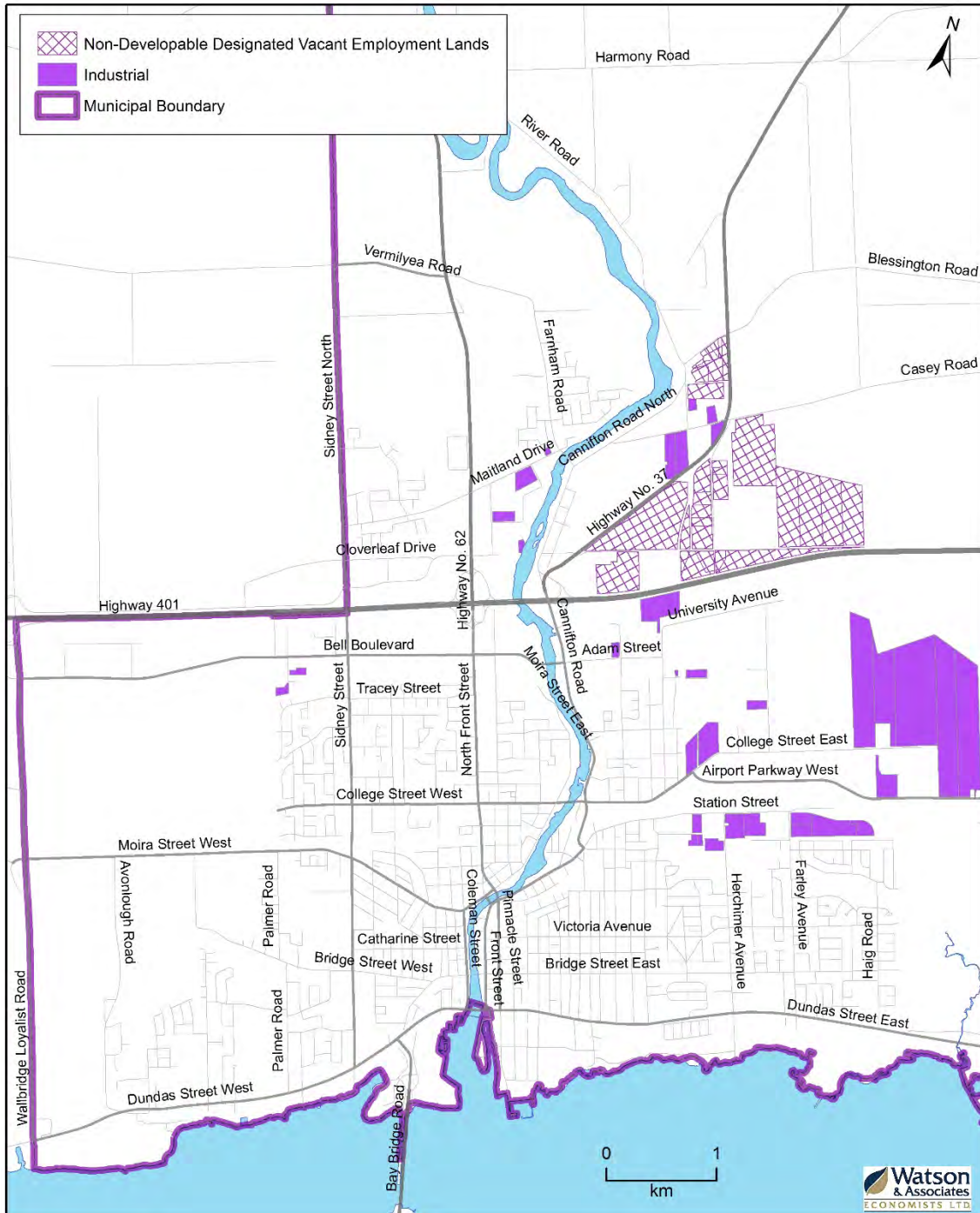


Figure 38
City of Belleville Urban Area
Vacant Designated Employment Land Supply¹
Gross vs. Net Supply of Employment Lands

Employment Area	Total Gross Vacant (A)		Environmentally Constrained Adjustment (B)		Adjustment for Roads and other Internal Infrastructure (C)		Net Vacant Development Employment Land Supply (D = A-B-C)	
	Net Acres	Net ha	Net Acres	Net ha	Net Acres	Net ha	Net Acres	Net ha
Cannifton East Industrial Area	998	404	0	0	123	50	875	354
Maitland/Parks Drive Industrial Area	13	5	0	0	0	0	13	5
North East Industrial Park	426	172	71	29	72	29	282	114
North West Industrial Park	4	2	0	0	0	0	4	2
Sidney Street Industrial Area	0	0	0	0	0	0	0	0
Wallbridge Crescent Industrial Area	0	0	0	0	0	0	0	0
Waterfront Industrial Area	0	0	0	0	0	0	0	0
Total	1,441	583	71	29	195	79	1,175	475

Source: Watson & Associates Economists Ltd., 2018.

1. Reflects environmental take outs of vacant employment lands encroached by environmentally sensitive lands identified as Environmental Protection (EP) lands in Schedule B of City of Belleville Official Plan.
2. A downward adjust of 25% of the gross area (after environmental take outs) has been applied to account for internal infrastructure on parcels greater than 10 acres (4 hectares) in size.

Long-term land vacancy (i.e. vacant industrial parcels) is a common characteristic which is experienced in mature industrial parks throughout Ontario, including the City of Belleville. Typically, as industrial/business park lands are brought to market, the more marketable and developable industrial sites absorb first. Often, the remaining less-marketable sites are fragmented throughout the industrial park, which limits their potential for larger scale development. Invariably, many of these sites remain vacant over the longer term, due to their limited market choice to end users. While these observations largely apply to Belleville's more mature employment areas, over time it is foreseeable that the City's newer employment areas will also begin to exhibit these characteristics.

¹ Includes all designated employment lands, including serviced and unserved.

Accordingly, additional reductions to the net developable vacant employment land supply have been made to account for long-term land vacancy, as summarized in Figure 39. This adjustment accounts for sites which are unlikely to develop over the long term due to odd/small lot sizes and poor configuration, unfavourable site conditions (e.g. low-lying areas prone to flooding), underutilized employment sites and site inactivity/land banking, which may tie up potentially vacant and developable lands.

For the purpose of this analysis, an estimate of approximately 5% long-term land vacancy has been used, i.e. (total net occupied (A) + total net vacant land area (B) X 5%). Adjusted for land vacancy, the City's net developable vacant employment land supply is 426 net ha (1,054 net acres).

Figure 39
City of Belleville
Urban Serviced Area
Vacant Designated Employment Land Supply¹
Net Supply of Employment Lands Adjusted for Long Term Vacancy

Employment Area	Occupied/Built Employment Lands (A)		Net Vacant Development Employment Land Supply (B)		Long-Term Land Vacancy Adjustment (C)		Total Net Employment Land Supply Adjusted for Land Vacancy (D= B-C)	
	Net Acres	Net ha	Net Acres	Net ha	Net Acres	Net ha	Net Acres	Net ha
Cannifton East Industrial Area	278	113	875	354	58	23	817	331
Maitland/Parks Drive Industrial Area	90	36	13	5	5	2	8	3
North East Industrial Park	819	331	282	114	55	22	227	92
North West Industrial Park	55	22	4	2	3	1	1	0.5
Sidney Street Industrial Area	74	30	0	0	0	0	0	0
Wallbridge Crescent Industrial Area	25	10	0	0	0	0	0	0
Waterfront Industrial Area	60	24	0	0	0	0	0	0
Total	1,402	567	1,175	475	121	49	1,054	426

Source: Watson & Associates Economists Ltd.

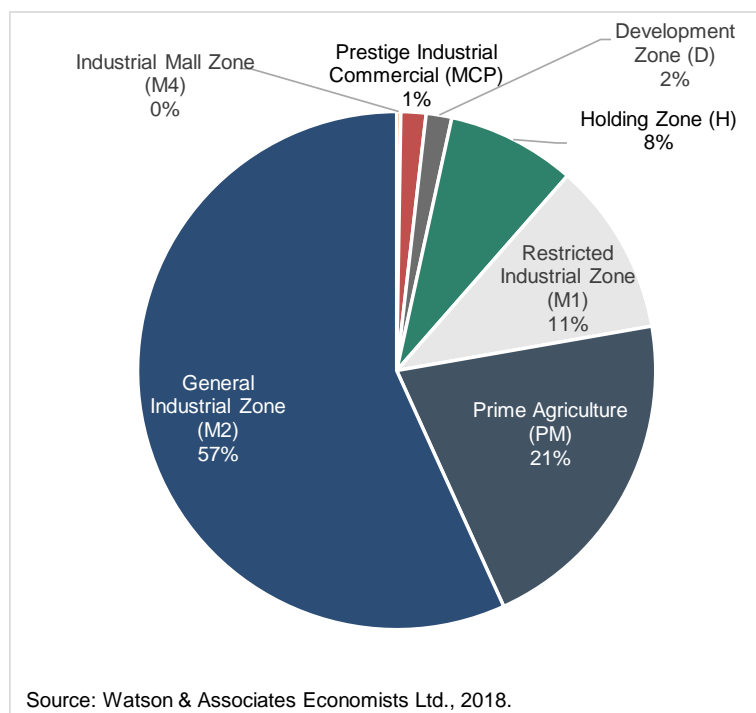
1. Reflects environmental take outs of vacant employment lands encroached by environmentally sensitive lands identified as Environmental Protection (EP) lands in Schedule B of City of Belleville Official Plan.

2. A downward adjust of 25% of the gross area (after environmental take outs) has been applied to account for internal infrastructure on parcels greater than 10 acres (4 hectares) in size.

¹ Includes all designated employment lands, including serviced and unserved.

Figure 40 summarizes the City's total net vacant employment land supply by zoning designation. As shown, 57% (206 net ha) of the City's vacant employment land is zoned General Industrial, 21% (76 net ha) is zoned Prime Agricultural, 11% (39 net ha) is zoned Restricted Industrial, 2% (6 net ha) is zoned Development Zone, 1% (5 net ha) is zoned Prestige Industrial Commercial and 1% (1 net ha) is zoned Industrial Mall. An additional 29 net ha (8% of the total vacant employment lands) is within a Holding Zone (H) with development currently not permitted.

Figure 40
City of Belleville Urban Area
Vacant Designated Employment Land Supply
Supply of Employment Lands by Zoning Designation



5.4 Future Commercial and Institutional Land Supply Opportunities

This M.C.R. includes an updated review of vacant commercial and community facility lands which are potentially available for immediate absorption and future long-term planning purposes. This updated assessment is summarized below.

5.4.1 Commercial Land Supply Opportunities

Figure 41 and Figure 42 summarize the supply of vacant commercial land within Belleville. Figure 43 presents the location of the City's vacant commercial lands spatially. This reflects all vacant lands that are designated "Commercial" in the City's O.P.

In total, the City has a gross supply of 312 ha (7,171 acres) of vacant commercial lands. Net developable commercial land area is estimated to total 234 net ha (578 net acres). Approximately half of the vacant designated commercial lands in the City of Belleville are located in the Loyalist Secondary Plan Area. Vacant land in this area is designated as "employment

area" in the Loyalist Secondary Plan and is planned to accommodate a mix of commercial and industrial uses. While these lands are included in the commercial vacant inventory, it is important to recognize that these lands will develop and function differently than other designated commercial lands in Belleville. Due to phasing of the residential development in the Loyalist Secondary Plan area and distance to established retail areas in the City, the commercial lands in the northern area of the Loyalist Secondary Plan are not anticipated to accommodate a wide range of retail uses in the short-term horizon. Recent development in this area has included the Marriot Hotel, Shorelines Casino, freightliner auto repair facility and a donation collection/retail outlet. It is anticipated that lands will continue to accommodate commercial services and retail uses which is not as dependent upon the local population compared to the City's other designated commercial retail areas and exposure of local traffic over the short and medium terms (e.g. automobile sales and services, equipment rentals, hotels).



Marriot Hotel and Shorelines Casino development in the Loyalist Secondary Plan Area.

The bulk of the City's vacant commercial lands are located in greenfield or developing areas, approximately 91% of the vacant commercial land. The majority of these lands have a limited established retail base.

Figure 41
City of Belleville Urban Area
Vacant Designated Commercial Land Supply (excludes Downtown)

Commercial Area	Total Gross Vacant ¹		Net Land Area Vacant ²		Vacant Land as % of Total Vacant land
	Net Acres	Net ha	Net Acres	Net ha	
Mature Commercial Areas					
Bell Boulevard Area	27.9	11.3	20.9	8.5	4%
Dundas Street East	9.4	3.8	7.0	2.8	1%
North Front Street/Highway 62 Corridor South of 401 Highway	0.6	0.2	0.4	0.2	0%
Other	28.6	11.6	21.5	8.7	4%
Total Mature Commercial Areas	66.5	26.9	49.9	20.2	9%
Greenfield/Developing Commercial Areas					
Millennium Parkway Area	27.0	10.9	20.3	8.2	4%
North Front Street/Highway 62 Corridor North of 401 Highway	186.3	75.4	139.7	56.5	24%
Cannifton Road/Highway 401 Area	58.6	23.7	44.0	17.8	8%
Loyalist Secondary Plan Area - North	394.7	159.7	296.0	119.8	51%
Loyalist Secondary Plan Area - Central/South	37.3	15.1	28.0	11.3	5%
Total Greenfield/Developing Commercial Areas	704.0	284.9	528.0	213.7	91%
Total	770.5	311.8	577.9	233.9	100%

Source: Watson & Associates Economists Ltd.

1. Excludes Environmental Protection Lands.

2. Net to gross ratio of 75%.

Figure 42
City of Belleville Urban Area
Vacant Designated Commercial Land Supply

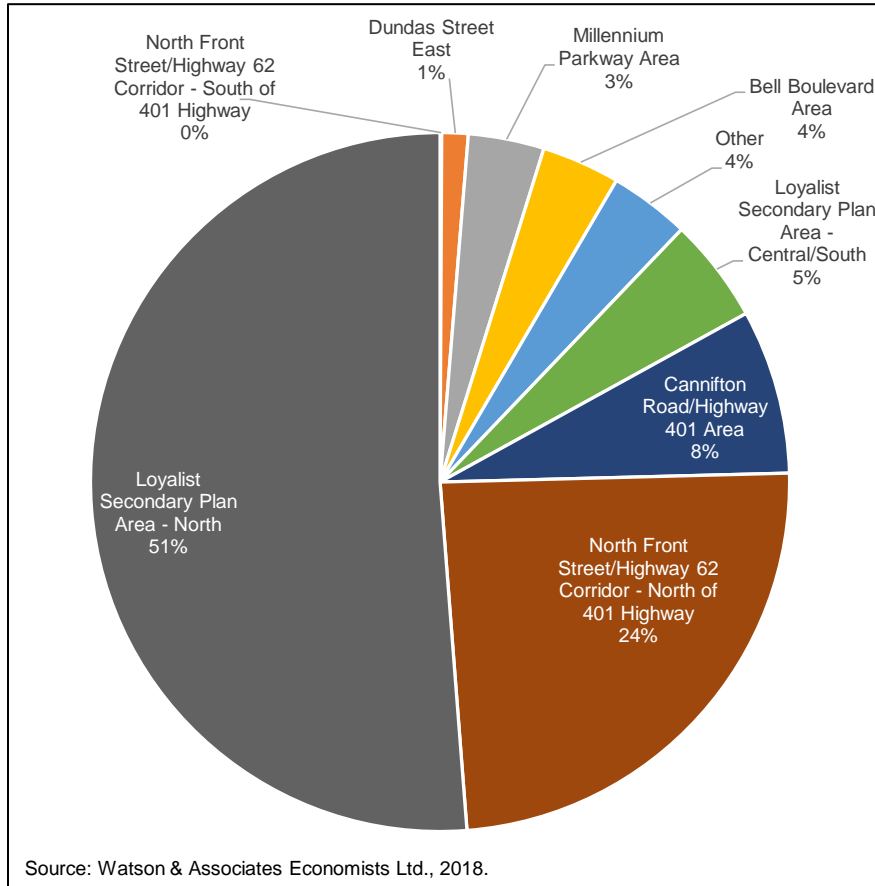
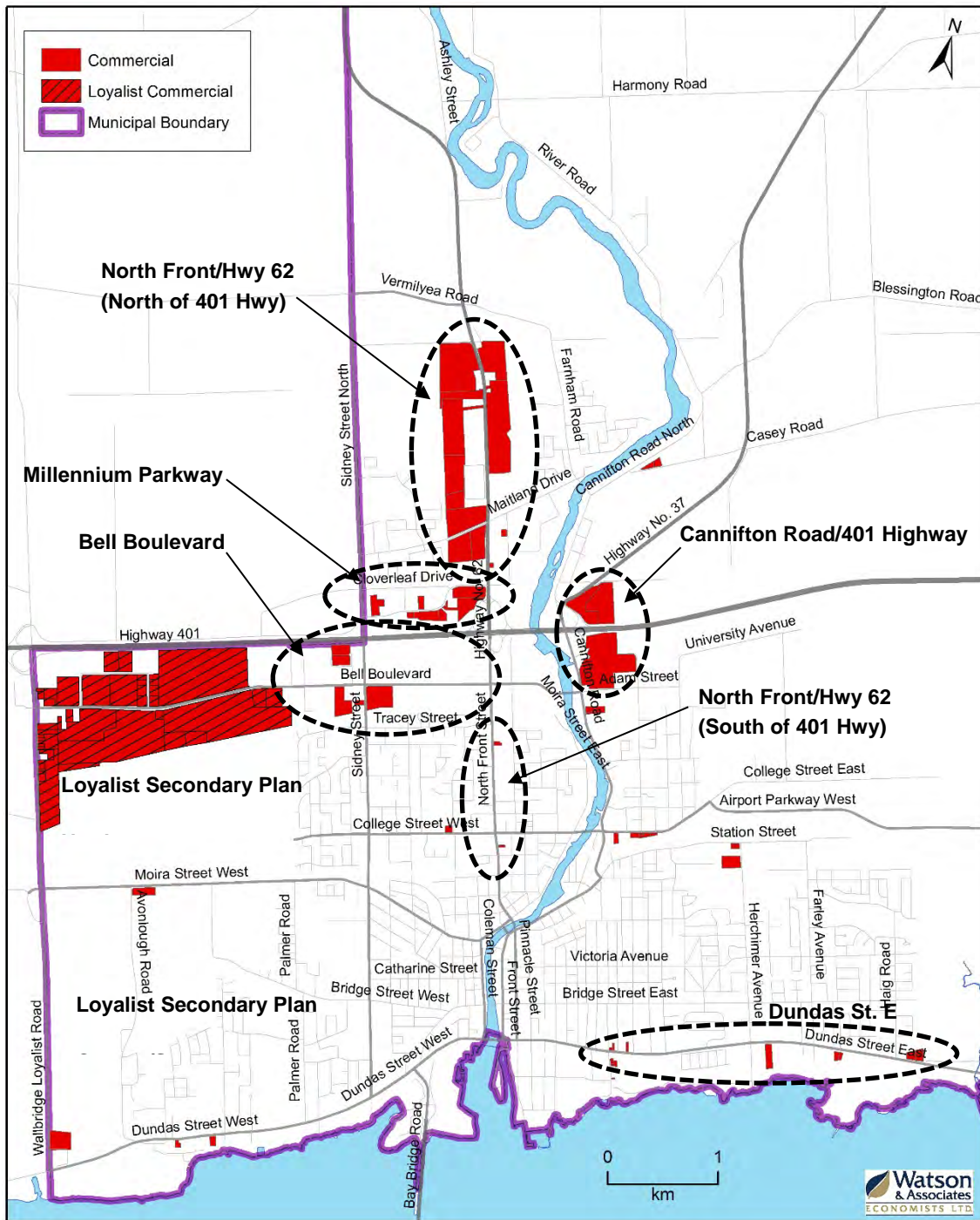


Figure 43
City of Belleville Urban Area

Vacant Designated Commercial Areas



Opportunities for Intensification

There is a significant opportunity to increase commercial space in the downtown. The City Centre Intensification Plan prepared in 2012,¹ identified the potential to accommodate 2.7 million sq.ft. of commercial (retail and office). The potential in the downtown will be greatest for office space, due to the potential for multi-storey development. It is important to note that the downtown currently accommodates the bulk of office space in the City.

The designated developed commercial lands located along the northern portion of the North Front/Highway 62 Corridor include commercial uses with very low building coverage ratios² and may provide additional opportunities for retail growth through intensification and/or redevelopment.

The City has also indicated that there are underutilized and/or smaller properties that could benefit from lot consolidation and redevelopment for mixed-uses that incorporate both commercial and residential uses that contribute to the urban fabric of the community. These are located within North Front Street Corridor, Dundas Street East Commercial Area, and Other Mature Commercial Areas. In addition, Greenfield/Developing Commercial Areas should be reviewed during the O.P. update to determine if there are any suitable areas that have strategic advantages to provide intensification policies for mixed-uses that incorporate both commercial and residential uses.

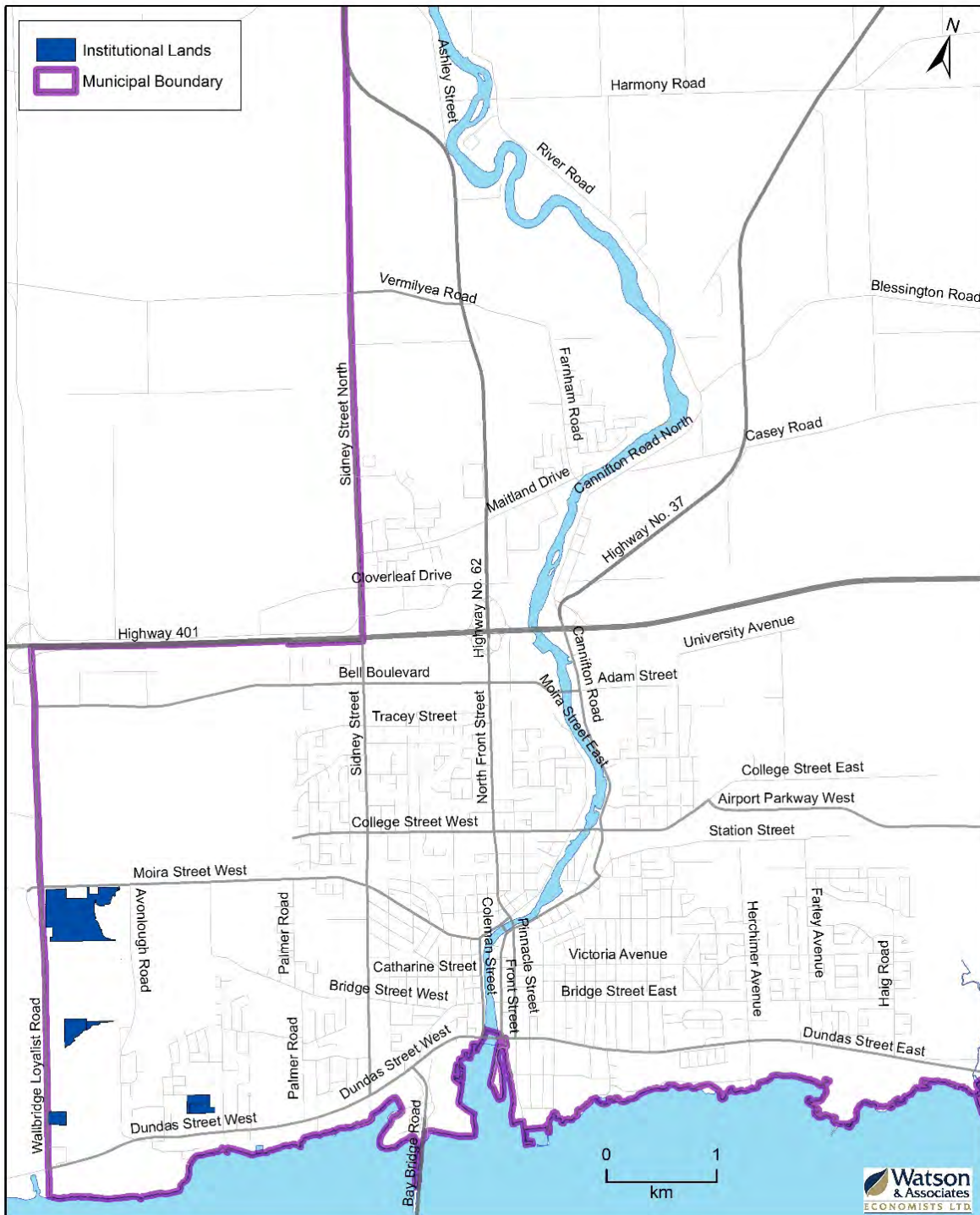
5.4.2 Community Facility Lands Supply Opportunities

Figure 44 (on the next page) provides a map of the supply of vacant greenfield community facility lands within Belleville. Belleville's vacant designated Community Facility greenfield lands total 32 net ha (80 net acres) and are located in the Loyalist Secondary Plan in proximity to Loyalist College, a post-secondary institution.

¹ City Centre Intensification Plan, prepared by RFA Planning Consultants Inc., 2012.

² Ratio of building footprint to lot area. Building coverages in this area is estimated at approximately 10% based on an analysis prepared by Watson & Associates Economists Ltd.

**Figure 44: City of Belleville Urban Area
Vacant Designated Institutional Areas**



6. Population, Housing and Employment Forecast, 2016 to 2041

This Chapter provides a comprehensive analysis of population and employment growth drivers for the City of Belleville from a regional and local perspective. The growth analysis provided herein builds on the findings detailed in Chapters 2 and 3. In accordance with recent demographic, economic and socio-economic trends, as well as the growth drivers identified for the City, a long-term population, housing and employment forecast has been prepared. In developing the City of Belleville's long-term population forecast, consideration has also been given to the most recent long-term population trends for Hastings County,¹ based on the Ministry of Finance (M.O.F.) Spring 2017 projections – reference scenario.²

The population and household forecasts are based on an approach commonly referred to as the cohort-survival methodology, as detailed in Appendix A. This approach uses, as its base, five-year age groups by sex and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality less out-migration, by age group). The cohort survival forecast methodology is recognized in the Province's 1995 "Projection Methodology Guidelines" as one of the more common, provincially-accepted approaches to growth forecasting.

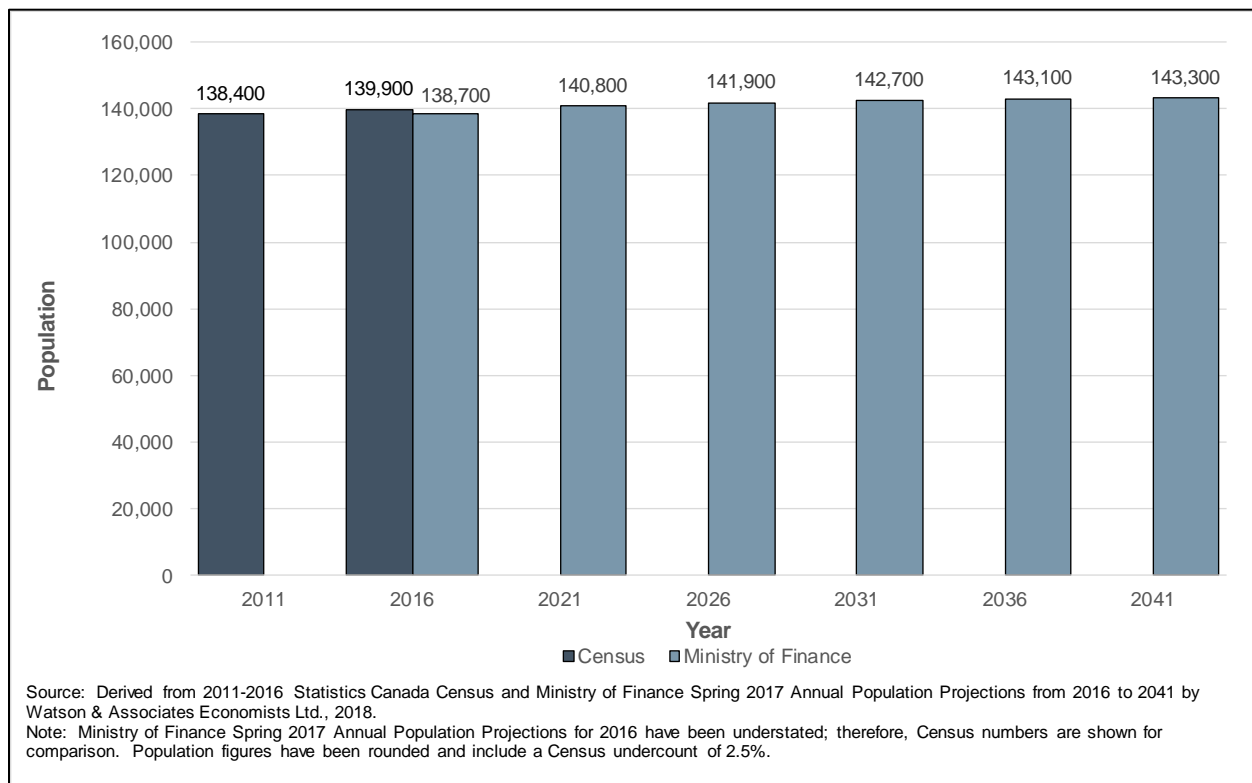
¹ For the purpose of this analysis, Hastings County includes the City of Belleville.

² Ministry of Finance, Spring 2017 Update, Table 12.3: Population by five-year age groups, 2016-2041 – reference scenario Hastings.

6.1 Hastings County Long-Term Population Forecast, 2016 to 2041

Figure 45 presents the long-term population forecast for Hastings County in accordance with the Spring 2017 M.O.F. reference scenario. As shown, the population of Hastings County is projected to increase from 139,900 in 2016¹ to 143,300 by 2041. This represents a modest annual rate of population growth over the 25-year forecast period of 0.1% (or 136 persons annually).

Figure 45
Hastings County
Long-Term Population Forecast, 2011 to 2041



¹ Note that Spring 2017 Ministry of Finance 2016 population estimates are lower than the 2016 Census.

6.2 Overview of Key Regional Economic Growth Drivers within the City of Belleville

Several key local drivers have been identified which are anticipated to influence future population, housing and employment growth within Belleville over the 2016 to 2041 period. These drivers are identified below.

Belleville's Growing Importance as a Regional Centre

Belleville serves a relatively large regional market which includes the Bay of Quinte region, encompassing the eastern part of Northumberland County, the southern part of Hastings County, Prince Edward County, and the southern part of Lennox and Addington County. Over the next two decades, Belleville's role as the largest urban centre in the region and primary service hub will continue to expand and evolve in retail trade, higher education and health services.

Population Growth of 55+ Age Group

Population growth of the 55+ age group across Ontario will continue to be a key driver of housing growth in Belleville over the next 25 years. For the Province of Ontario as a whole, the percentage of the 55+ age group to the total population is projected to increase from 30% in 2016 to 35% in 2036.¹ The source of net migration to Belleville within the 55+ age category will largely be from the surrounding Bay of Quinte region, and the G.T.H.A.

Future housing demand across the City of Belleville generated by the 55+ age group is anticipated to remain strong over the next decade driven by the aging of the baby boom population. This will generate an increasing need to accommodate a growing number of seniors in housing forms that offer a variety of services ranging from independent living to assisted living and full-time care. On the other hand, a growing wave of new Belleville residents will be seeking housing opportunities that are geared towards active lifestyles and recreation.

Geographic Location

Location plays a key role in the geographic distribution of the dominant industry clusters visible across Ontario today. Belleville benefits from its location along Highway 401,

¹ Ministry of Finance, Spring 2017 Update, Table 6: Ontario Population Projections, 2016-2041, reference scenario.

which serves as Canada's major trade corridor and links major urban centres in Ontario and Quebec to the United States. Belleville's employment lands are centrally located to serve major North American employment markets in eastern Ontario, Quebec and the north-eastern U.S.

Quality of Life

Quality of life is a key factor influencing the residential location decisions of individuals and their families. It is also a factor considered by companies in relocation decisions. Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences.

The City of Belleville has a reputation for being a vibrant, growing, affordable, low-crime location in which to live in Ontario, with access to a wide range of recreational opportunities within the City and surrounding countryside. Furthermore, given the City's strategic location between major markets such as Toronto, Kingston and Ottawa, and its proximity to Highway 401, Belleville is well-positioned to develop and expand its economic base.

6.3 City of Belleville Long-term Population Growth

This section provides a detailed analysis of population growth for the City of Belleville. As previously discussed, a broad range of considerations related to demographics, economics and socio-economics are anticipated to drive future growth throughout the City over the long-term planning horizon. These factors will not only impact the rate and magnitude of growth but will also influence the form, density and location of residential development throughout Belleville.

Figure 46 summarizes the population growth forecast for the City. Between 2016 and 2041, the City's population is forecast to increase by 6,400, which represents an annual population increase of 0.5%

Figure 46
City of Belleville
Population Growth Forecast, 2006 to 2041¹

Year	Population (Excluding undercount)	Population (Including undercount) ¹
Mid 2006	48,800	50,600
Mid 2011	49,500	50,700
Mid 2016	50,700	51,900
Mid 2021	52,900	54,200
Mid 2026	54,500	55,900
Mid 2031	55,700	57,100
Mid 2036	56,600	58,000
Mid 2041	56,900	58,300
Mid 2016-Mid 2021	2,200	2,300
Mid 2016-Mid 2026	3,800	4,000
Mid 2016-Mid 2031	5,000	5,200
Mid 2016-Mid 2036	5,900	6,100
Mid 2016-Mid 2041	6,200	6,400
Mid 2006-Mid 2011	700	100
Mid 2011-Mid 2016	1,200	1,200
Mid 2016-Mid 2021	2,200	2,300
Mid 2021-Mid 2026	1,600	1,700
Mid 2026-Mid 2031	1,200	1,200
Mid 2031-Mid 2036	900	900
Mid 2036-Mid 2041	300	300

Source: Data from 2006-2016 based on Statistics Canada Demography Division by Watson & Associates Economists Ltd., 2018.

Note: Population figures have been rounded.

¹ Census undercount estimated at approximately 2.5%. The net Census undercount represents the net number of persons missed during Census enumeration.

6.4 Labour Force Growth Forecast, 2016 to 2041

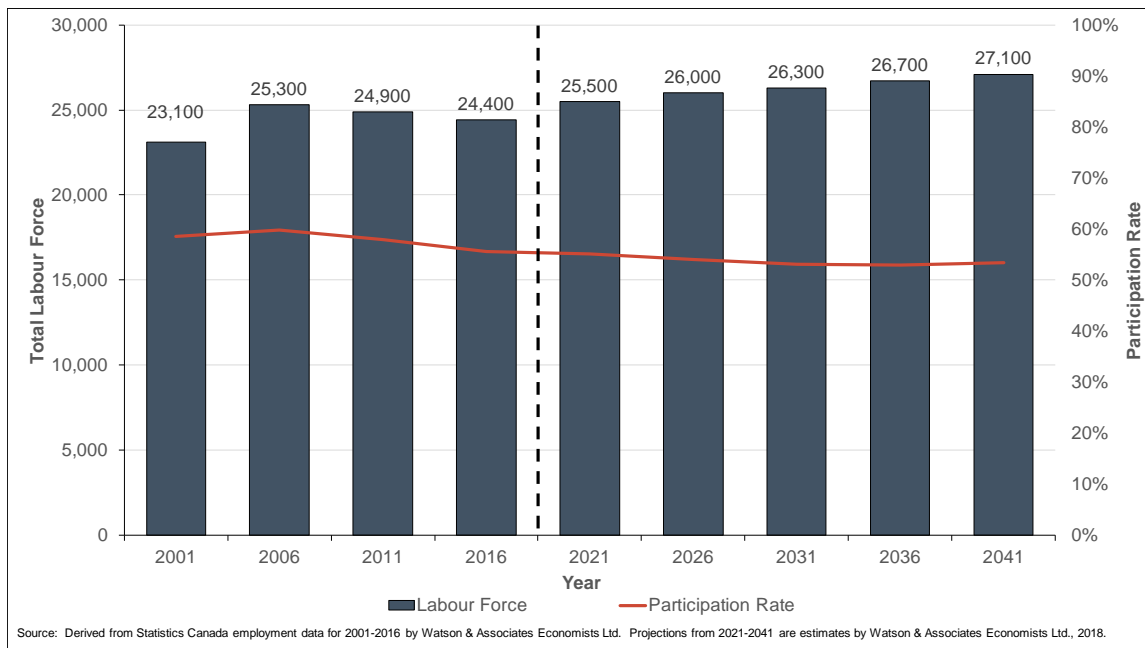
Figure 47 summarizes the long-term labour force growth forecast for the City of Belleville from 2016 to 2041. As previously addressed in Chapter 2, local labour force growth represents the primary driver of future net migration within the City of Belleville related to the working-age population. The City's forecast labour force growth potential is largely tied to local employment growth opportunities within the City, as well as employment growth potential within primary and secondary commuter-sheds (i.e. potential opportunities for out-commuters). By 2031, the City of Belleville's total labour force is forecast to grow to 26,300, which represents an increase of 1,900 from 2016. By 2041, the City's total labour force is forecast to reach 27,100, representing a further increase of 800 over the 2031 to 2041 period.

As previously identified, the population and the labour force base are aging across the Province as well as at the regional level. Looking forward, the aging labour force base is anticipated to result in a gradual decline in the labour force participation rates over the first half of the forecast period (2016 to 2031) from 56% to 53%.¹ Between 2031 and 2041, labour force participation rates are forecast to stabilize at approximately 53%, largely driven by higher labour force participation in the 55+ age group over the long term. As previously mentioned, forecast trends in labour force growth and labour force participation represents a key driver of net migration which, in turn, is a key component of population growth.

The City's labour force grew at an annual rate of 0.4% between 2001 and 2016. Over the 2016 to 2041 forecast period, Belleville's labour force growth rate is projected to increase at a comparable growth rate averaging approximately 0.4% annually.

¹ The labour force participation rate is defined as the ratio of employed and unemployed people to the total working-age population (aged 15 years and older).

Figure 47
City of Belleville
Forecast Labour Force Growth, 2016 to 2041



Population & Labour Force Population	Historical Period				Forecast Period				
	2001	2006	2011	2016	2021	2026	2031	2036	2041
City of Belleville Total Labour Force	23,100	25,300	24,900	24,400	25,500	26,000	26,300	26,700	27,100
Total Population	47,800	50,600	50,700	51,900	54,200	55,900	57,100	58,000	58,300
Total Population 15 Years and Older	39,500	42,400	42,900	43,900	46,300	48,200	49,600	50,400	50,800
Total Labour Force Participation Rate	59%	60%	58%	56%	55%	54%	53%	53%	53%

Source: Derived from Statistics Canada employment data for 2001-2016 by Watson & Associates Economists Ltd. Projections from 2021-2041 are estimates by Watson & Associates Economists Ltd., 2018.

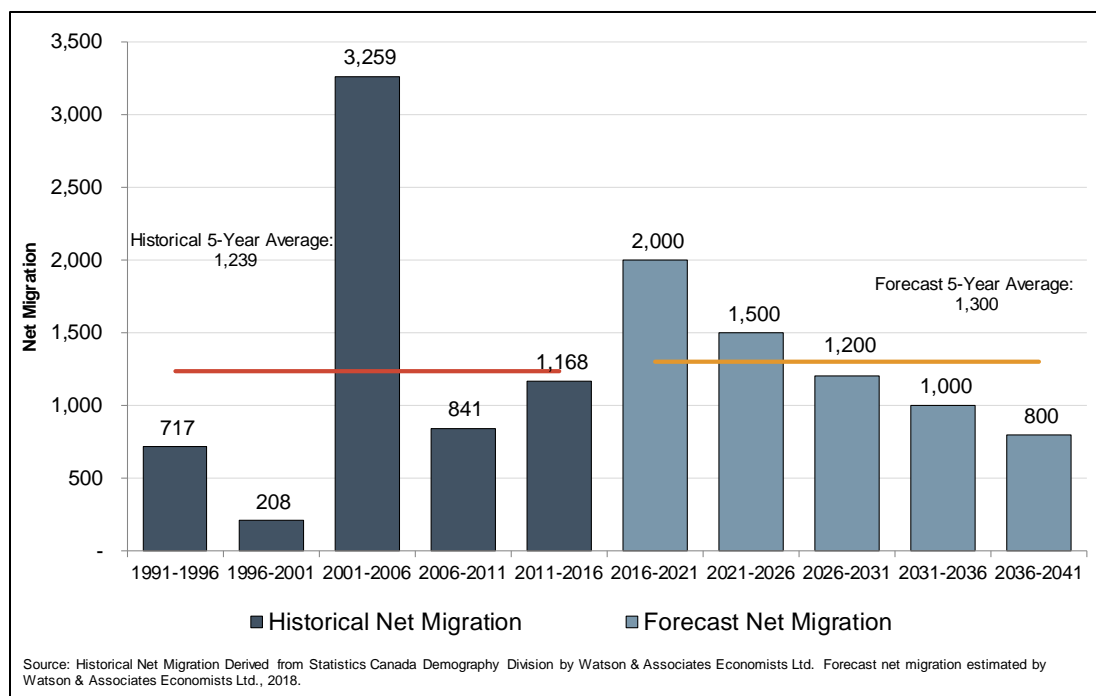
6.5 Components of Forecast Population Growth

6.5.1 City of Belleville Net Migration Forecast, 2016 to 2041

Net migration represents the primary driver of long-term population growth for the City of Belleville. Similar to recent trends, net migration trends are anticipated to be strongest within the 55+ age group (older adults). To a lesser extent, population growth within the City of Belleville is also anticipated to be supported by net migration in the 35 to 54 age group as well as children 14 to 18 years of age. As previously discussed, net migration in the City of Belleville is anticipated to be largely driven by the long-term economic growth prospects in the regional economy and surrounding commuter-shed.

Figure 48 summarizes forecast net migration for the City of Belleville over the 2016 to 2041 forecast period relative to actual net migration levels achieved during the 1991 to 2016 period. In comparison to historical trends, average net migration over the next 25 years is forecast to be marginally higher than historical levels experienced between 1991 and 2016. Over the 2016 to 2021 period, net migration is forecast to peak at 2,000 persons, followed by a gradual decline over the following two decades. This decline is anticipated as a result of the aging of the regional labour force base and slower population growth for the Province as a whole during the post-2021 period.

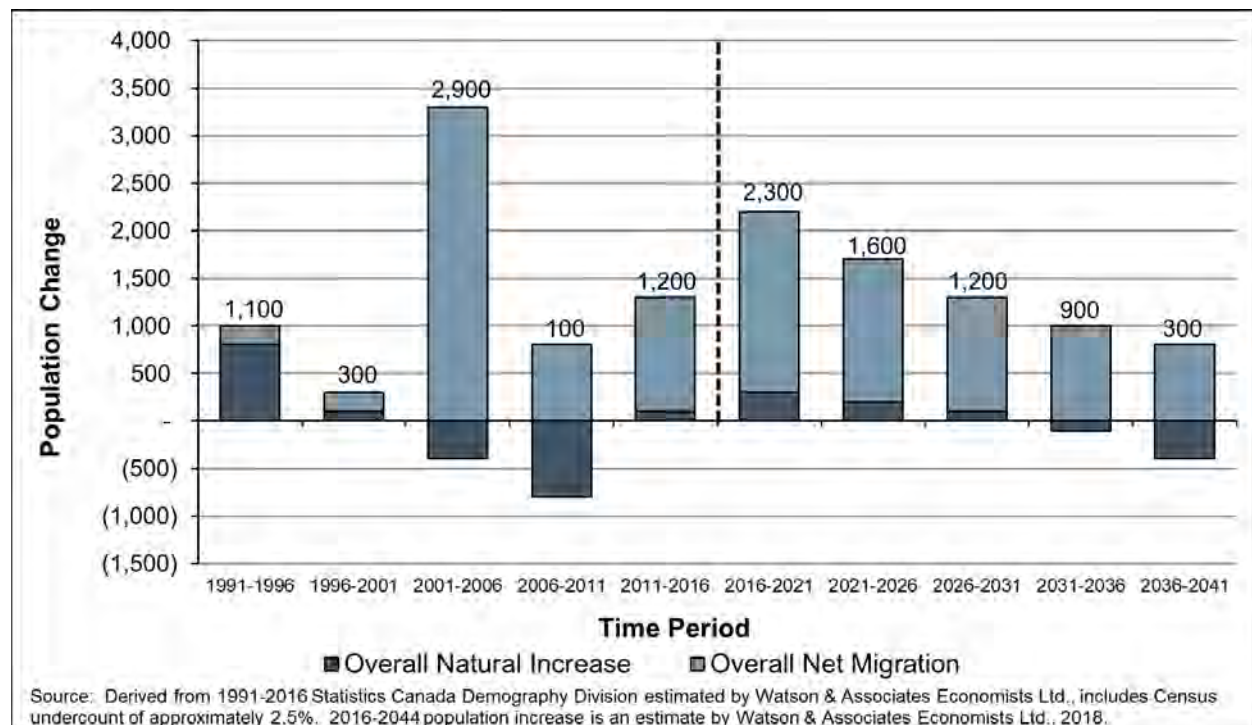
Figure 48
City of Belleville
Forecast Net Migration, 2016 to 2041



6.5.2 Forecast Trends in Natural Increase (Births Less Deaths), 2016 to 2041

As previously discussed, population growth associated with natural increase steadily diminished between 1991 and 2016 for the City of Belleville, as a result of the City's aging population combined with lower fertility rates relative to historical trends. Over the forecast period, the population growth from natural increase is forecast to steadily decline between 2016 and 2041, due to the continued aging of the City's population, as illustrated in Figure 49. This trend is consistent with most Ontario and Canadian municipalities. The implication of this trend is that the City will become increasingly dependent on net migration as a source of population growth.

Figure 49
City of Belleville
Historical and Forecast Net Migration vs. Natural Increase



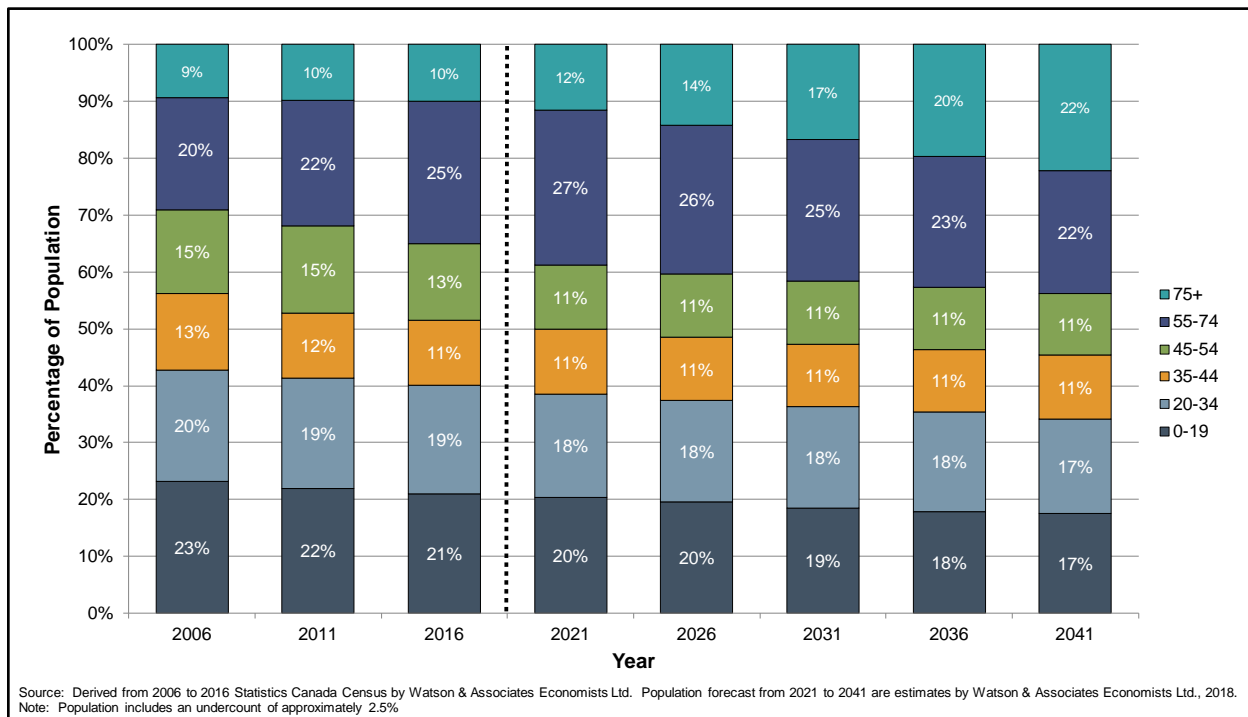
6.6 City of Belleville Population Forecast, 2016 to 2041

6.6.1 Population Forecast by Age Cohort

Figure 50 summarizes the population growth forecast by major age group over the 2016 to 2041 period for the City of Belleville. Key observations are as follows:

- The percentage of population in the 0-19 age cohort (youth population) is forecast to gradually decline from 21% in 2016 to 17% in 2041;
- Belleville’s population 20-54 years of age is the largest age cohort group, and is forecast to decline from 44% in 2016 to 39% in 2041;
- The 55-74 age group (empty-nesters/younger seniors) is forecast to marginally decrease from 25% in 2016 to 22% in 2041; and
- The percentage of the population in the 75+ age group (older seniors) is forecast to more than double over the 25-year period, from 10% in 2016 to 22% in 2041.

Figure 50
City of Belleville
Population by Age Forecast, 2016 to 2041

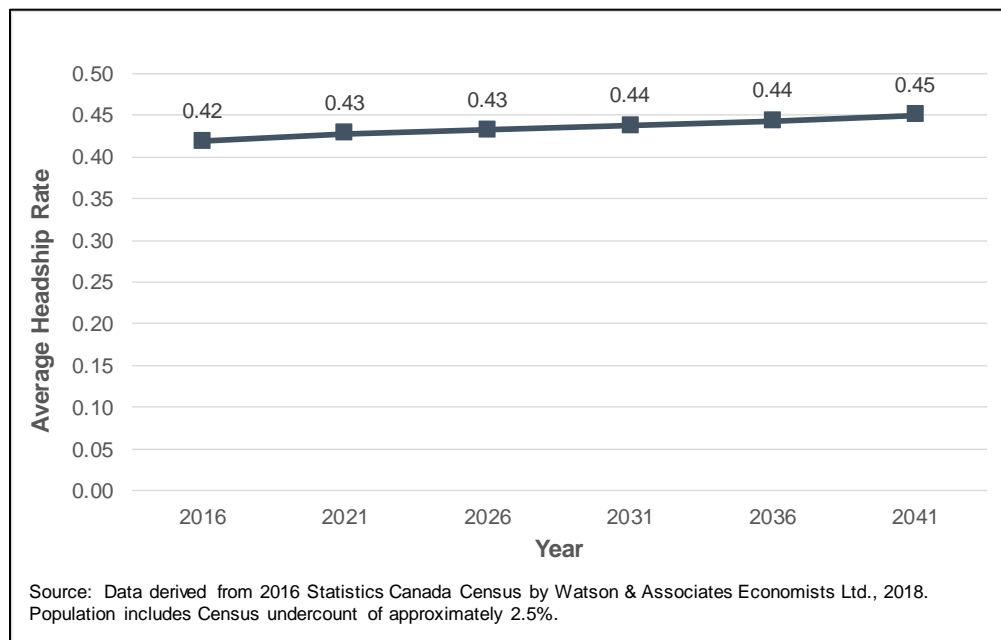


6.7 City of Belleville Forecast Housing Trends, 2016 to 2041

6.7.1 Forecast Household Growth by Age of Household Maintainer

A total household forecast has been generated using a forecast headship rate, as summarized in Figure 51. As previously identified, a headship rate is defined as the number of primary household maintainers or heads of households by major population age group. The headship forecast forms the basis for determining the demand for new households generated from population growth. Dividing total units over population generates the resulting long-term P.P.U. for the City from 2016 to 2041.

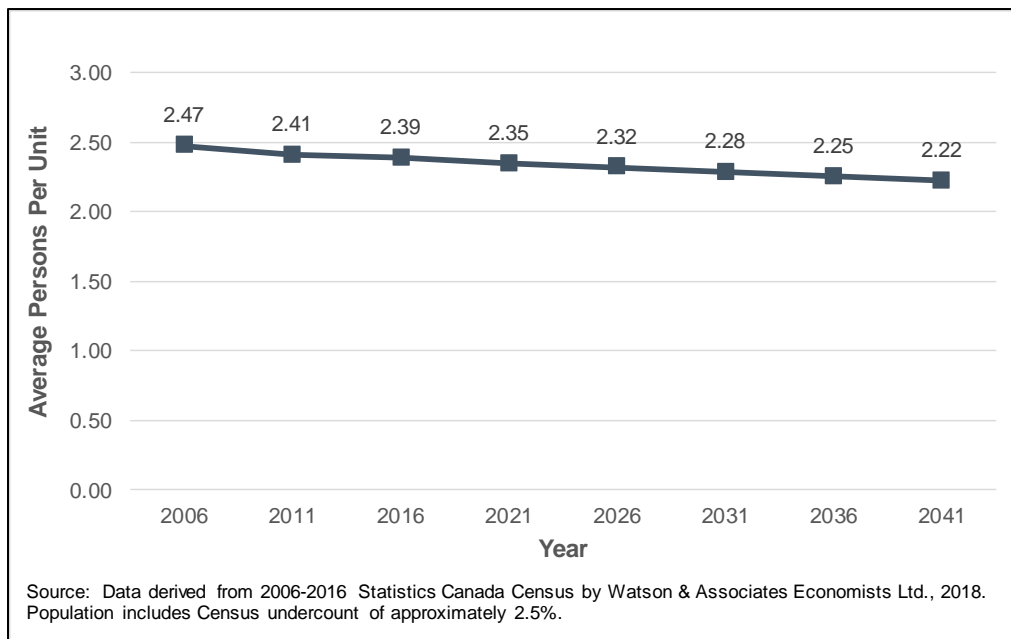
Figure 51
City of Belleville
Forecast Household Headship Rates, 2016 to 2041



6.7.2 Average Persons Per Housing Unit (P.P.U.)

Figure 52 summarizes the P.P.U. forecast for the City of Belleville from 2016 to 2041 in accordance with the headship rate analysis discussed above. Over the forecast period, the City's average P.P.U. is anticipated to steadily decline from 2.39 in 2016 to 2.23 in 2041, largely as a result of the aging of the City's population.

Figure 52
City of Belleville
Forecast Average Persons Per Housing Unit (P.P.U.), 2006 to 2041



6.7.3 City of Belleville Household Growth Forecast, 2016 to 2041

Figure 53 summarizes the City of Belleville total household forecast from 2016 to 2041. By 2031 the City's housing base is forecast to increase to 25,000 units from 21,700 in 2016. The rate of housing growth is forecast to slow during the post-2031 period in accordance with forecast population growth trends during this time period. By 2041, the City is forecast to increase to 26,200 households.

Figure 54 summarizes the City's housing growth forecast in five-year increments from 2016 to 2041. During the 25-year forecast period, the City is forecast to average 180 new households per year (equal to 900 per five-year increment), which is moderately higher than the historical average over the 2001 to 2016 period (approximately 160 units annually).

Figure 53
City of Belleville
Forecast Households, 2016 to 2041

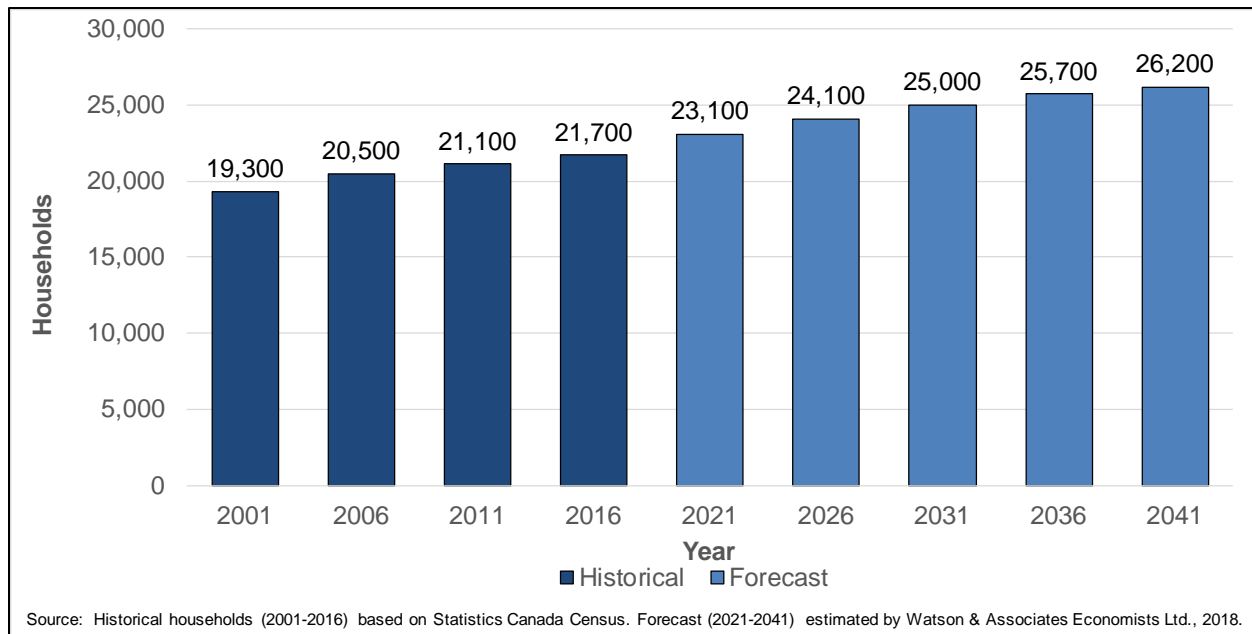
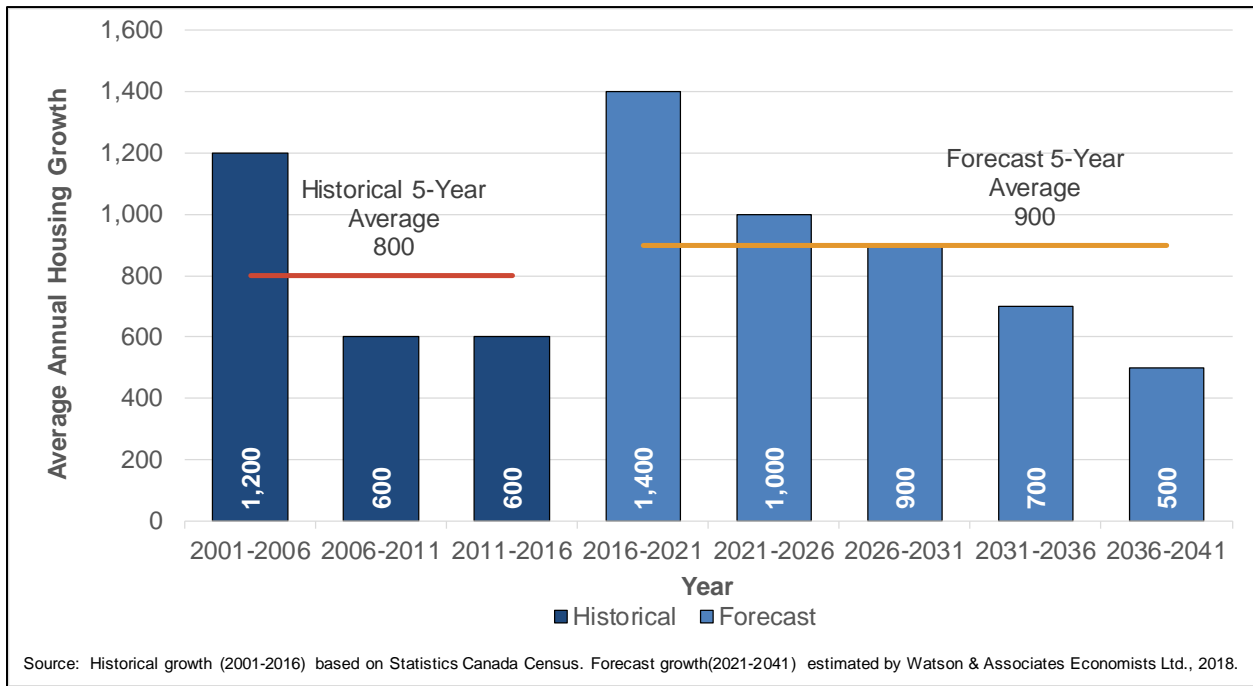


Figure 54
City of Belleville
Five-Year Incremental Housing Growth – Historical and Forecast, 2001 to 2041

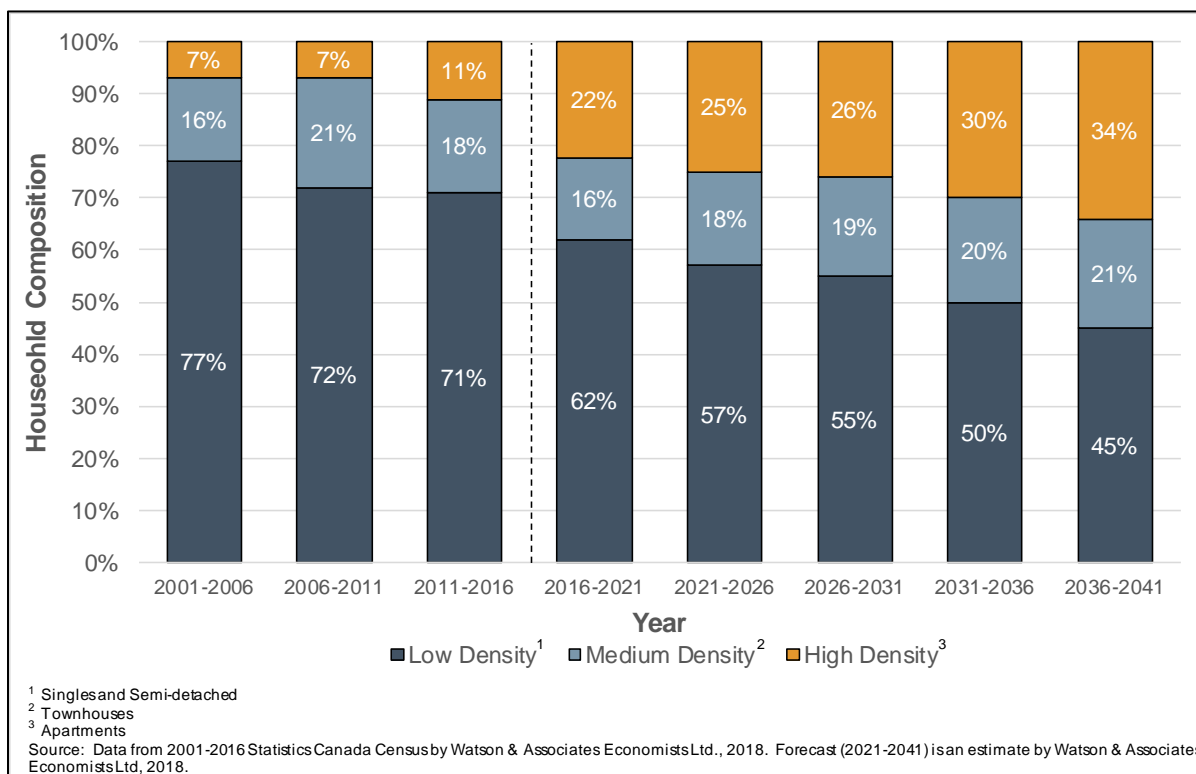


6.7.4 Forecast Annual Housing Growth by Structure Type

Figure 55 summarizes the City of Belleville housing forecast by structure type (i.e. low density, medium density and high density) over the 2016 to 2041 forecast period in five-year growth increments. For comparative purposes, historical housing growth by structure type is also provided for the period between 2001 and 2016 (refer to Appendix D for additional details). Key observations include:

- In the short-term, new residential development within the City of Belleville will continue to be concentrated in low-density housing forms, largely driven by demand from new families and empty nesters;
- As previously discussed, housing preferences by structure type are anticipated to continue to gradually shift from low-density to medium- and high-density housing forms over the long term. This shift is anticipated to be driven largely by the aging of the population; and
- Over the 2016 to 2041 projection period, housing demand is forecast to be comprised of 56% low-density housing, 18% medium-density housing and 26% high-density housing.

Figure 55
City of Belleville
Forecast Households by Structure Type



6.8 Long-term Employment Growth

The following provides an assessment of the long-term employment potential for the City of Belleville to the year 2041 by major employment sector, building on the macro-economic analysis as well as regional/local non-residential development trends previously discussed in Chapters 2 and 3. Also provided herein is a commentary with respect to key industry sectors that are anticipated to drive market demand for non-residential lands over the 2018 to 2041 period.

6.8.1 Forecast Employment Growth, 2016 to 2041

As shown in Figure 56, over the 2016 to 2041 forecast period, the City’s employment base is expected to add an additional 4,000 jobs, bringing the total employment in 2041 to 36,900 jobs. This represents an average annual growth rate of 0.5% over the 25-year forecast period. Over the 2016 to 2041 forecast period, the City’s employment activity rate (ratio of jobs to population) is forecast to remain relatively steady at 65%.

Figure 56
City of Belleville
Employment Forecast, 2016 to 2041

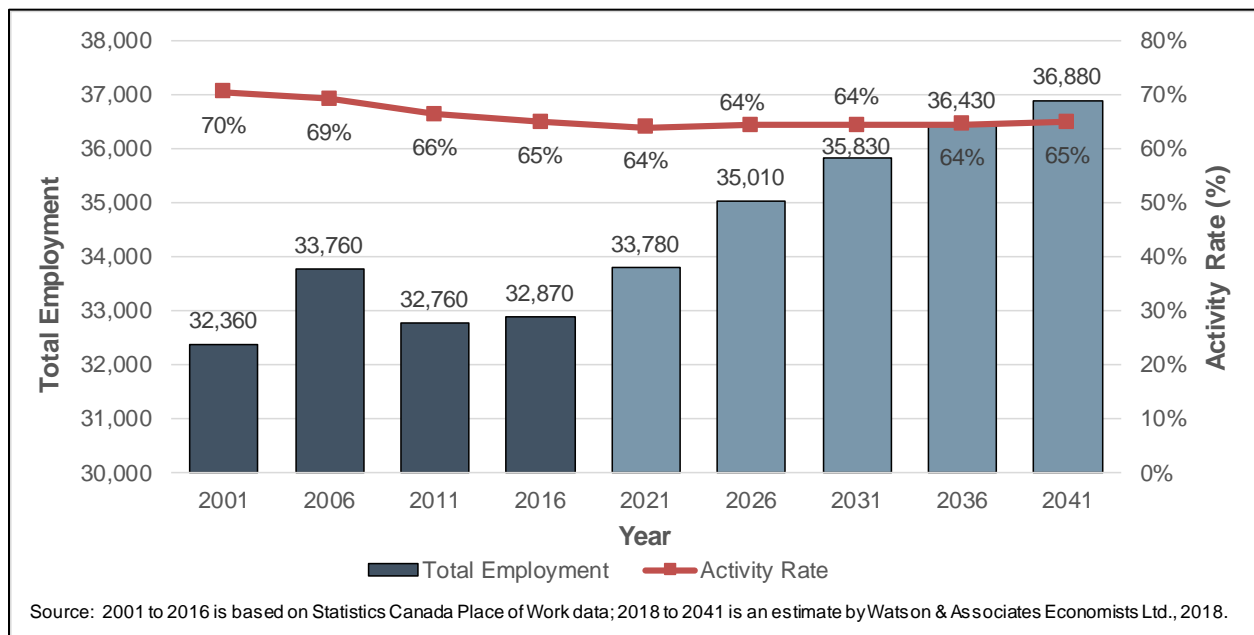
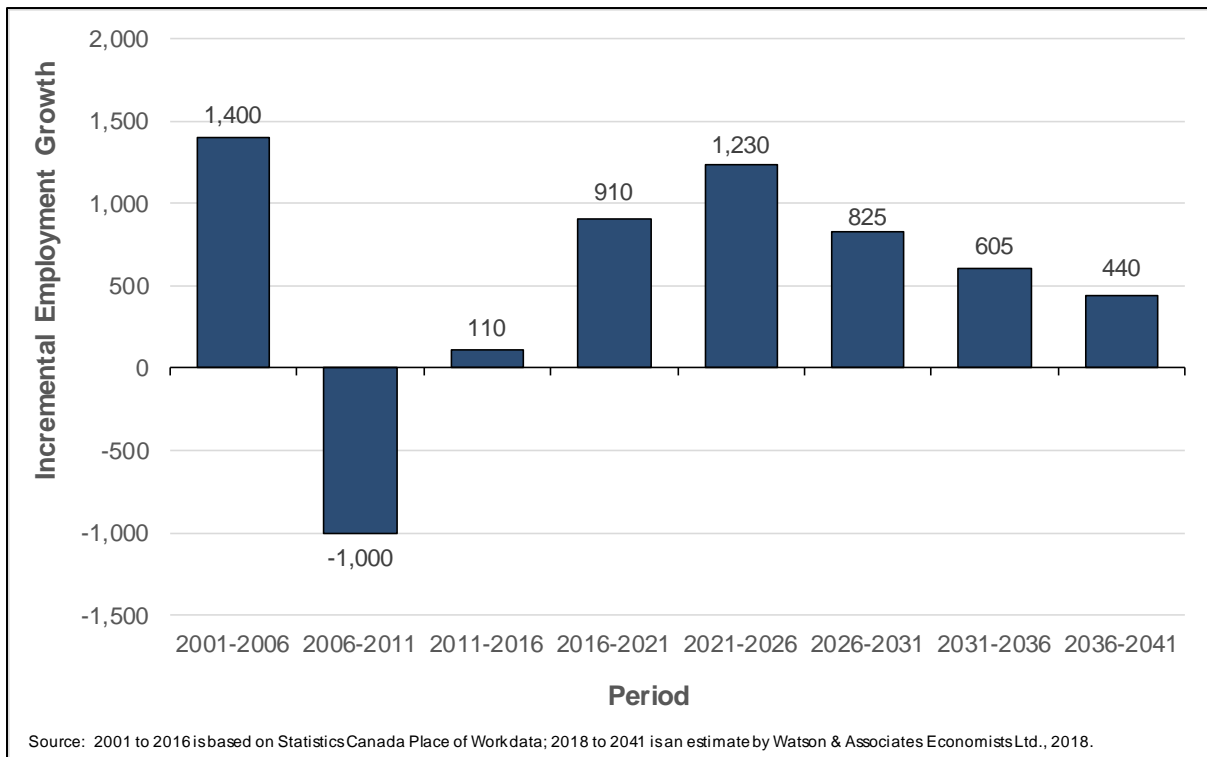


Figure 57 summarizes the forecast employment growth in five-year increments by major sector in comparison to historical trends (2001 to 2016). As illustrated, employment growth over the 2016 to 2021 period is expected to total 910 jobs. Over the 2021 to 2026 period, employment is forecast to grow by 1,230 jobs. Employment growth is anticipated to gradually decline over the 2026 to 2036 period, largely as a result of the age of the population and labour force relative to the previous 10-year period.

Figure 57
City of Belleville
Incremental Employment Growth, 2001 to 2041

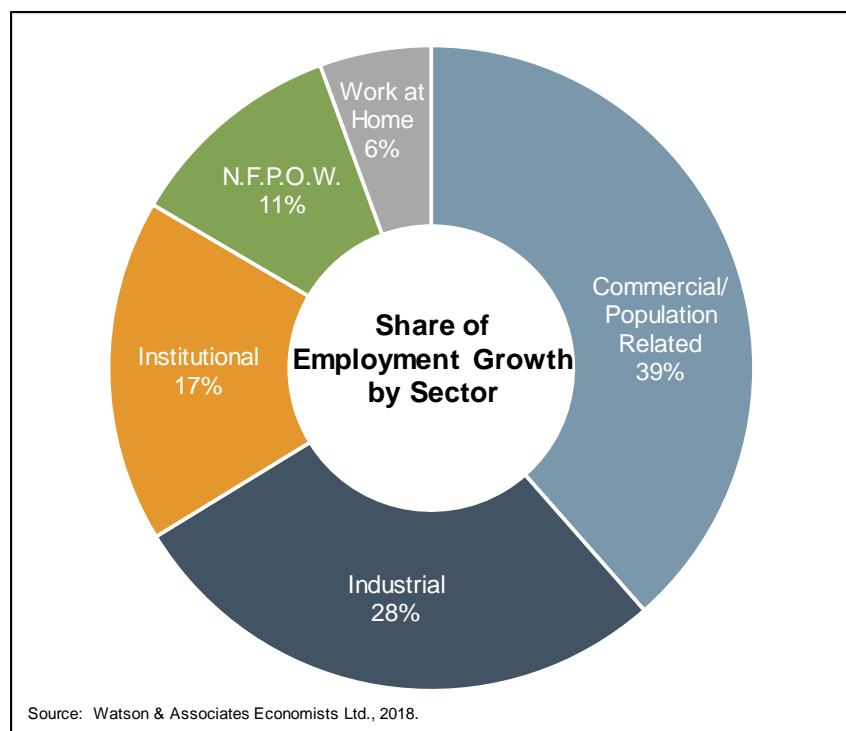


6.8.2 Forecast Employment Growth by Major Sector, 2018 to 2041

As of mid-2018, Belleville's employment base is estimated at approximately 32,930 jobs, a 0.2 % increase from the Census employment base of 32,870 jobs in 2016. Over the 2018 to 2041 forecast period, the City's employment base is expected to expand by approximately 4,000 jobs.

Employment growth is expected across a wide range of sectors driven by continued diversity of the regional and local economic base and steady local population growth. Figure 58 summarizes the 2018 to 2041 employment forecast by major employment sector for the City of Belleville (refer to Appendix E for additional details). As shown, the City is anticipated to experience strong employment growth in the commercial sector, accounting for 39% of City-wide employment growth. The industrial and institutional sectors are each expected to account for 28% and 17% of the total employment growth, respectively. No fixed place of work (N.F.P.O.W.) and work at home employment are expected to account for 11% and 6% of employment growth, respectively.

Figure 58
City of Belleville
Share of Employment Growth by Sector, 2018 to 2041



With respect to employment growth by major employment sector, the following observations have been made:

- **Primary Employment** – Primary industries (i.e. agriculture and other resource-based employment) comprise a relatively small proportion of Belleville’s employment base (approximately 0.1% in 2016). This sector is not anticipated to experience any employment growth over the 2018 to 2041 forecast period.
- **Industrial Employment** – Future industrial employment growth in Belleville is anticipated to total approximately 1,110 over the 2018 to 2041 period, accounting for 28% of employment growth. Industrial employment growth is anticipated to be concentrated in sectors related to small/medium-scale manufacturing (primarily firms which are technology intensive), construction, wholesale trade, food processing and transportation and warehousing.
- **Commercial Employment** – Commercial/population-related employment (which includes the office and retail sectors) represents the City’s largest major sector with respect to total employment growth. This sector is largely driven by local and regional population growth. Commercial employment growth is forecast to increase by approximately 1,500 jobs over the 2018 to 2044 period, accounting for 39% of total employment growth.
- **Institutional Employment** – Belleville is anticipated to experience a modest employment increase in the institutional sector, representing 700 jobs (18% of total employment growth), which will be largely driven by population growth. This includes employment growth in education, health and social services and other institutional facilities (i.e. cultural, religious). The City is expected to see an increase in seniors’ health facilities/services, including retirement homes and assisted living facilities, as well as other institutional-related development due to a growing, but aging population base.
- **Work at Home** – In addition to reviewing employment trends by usual place of work, consideration has also been given to the employment outlook in Belleville for employees who work at home. Over the forecast period, work at home employment in the City is expected to expand by 200 jobs, driven by forecast growth in the knowledge-based and creative economy. This will be facilitated by opportunities related to telecommuting and increased technology. Demographics also play a role in the employment outlook for work at home employment. As the City’s population and labour force continues to age, it is likely that an increased number of working and semi-retired residents will be seeking lifestyles which will allow them to work from home on a full-time or part-time basis.

- **No Fixed Place of Work (N.F.P.O.W.)** – This type of employment is forecast to steadily increase within the City over the long term, largely driven by steady employment growth in the construction, and transportation and warehousing sectors. Over the forecast period, N.F.P.O.W. employment is expected to expand by approximately 400 jobs, 10% of the total employment growth.

7. Residential Land Needs

The following Chapter presents the allocation of the City-wide housing forecast within the urban area and the remaining rural area. Further, this Chapter examines the City's urban residential land needs to the year 2038,¹ based on the supply analysis provided in Chapter 5.

7.1 Housing Growth Allocations by Geographic Area, 2018 to 2038

In accordance with the housing forecast presented in section 6.7, over the next two decades (2018 to 2038), Belleville's housing base is expected to increase by 3,510 units, as illustrated in Figure 59. A summary of the housing growth forecast by unit type and location is provided below, based on a review of intensification and greenfield housing supply opportunities, recent development trends, as well as an assessment of future market demand for housing in Belleville.

Figure 59
City of Belleville
Housing Forecast, 2018 to 2038

Housing Type	City-Wide Housing Growth			
	2018-2023	2018-2028	2018-2033	2018-2038
Low Density ¹	641	1,181	1,703	1,943
Medium Density ²	166	343	535	637
High Density ³	253	497	772	930
Total	1,060	2,020	3,010	3,510

Source: Watson & Associates Economists Ltd., 2018.

¹ Singles and Semi-detached

² Townhouses

³ Apartments

¹ Residential land needs are forecast over a 20-year time horizon in accordance with subsection 1.1.2 of the P.P.S.

7.1.1 Urban and Rural Housing Growth

Based on historical and forecast housing trends, it is estimated that 94% (3,300 units) of housing growth over the 2018 to 2038 period will be accommodated within the urban area, while 6% (210 units) will be accommodated in the rural area, as summarized in Figure 60. All of the housing development in the rural area is expected to consist of low-density housing.

Figure 60
City of Belleville
Forecast Housing Demand, 2018 to 2038, Urban and Rural Area

Location	Low Density ¹	Medium Density ²	High Density ³	Total	Proportionate Share of Total
Urban	1,732	637	930	3,299	94%
Rural	211	0	0	211	6%
Total	1,943	637	930	3,510	100%

Source: Watson & Associates Economists Ltd., 2018.

¹ Singles and Semi-detached

² Townhouses

³ Apartments

7.1.2 Urban Housing Growth – Intensification

As previously addressed in Chapter 5, future residential intensification opportunities within Belleville will be primarily realized through infill and redevelopment opportunities within the City Centre. As identified, potential supply opportunities for intensification within the City Centre are significant, totalling approximately 2,350 housing units.

As discussed in Chapter 3, total residential intensification over the 2013 to 2017 period accounted for 15% of total housing growth over the past five years (2013 to 2017). The share of housing growth accommodated through intensification has remained relatively stable over the past decade.

Opportunities to accommodate future housing growth through second suites is also an important consideration. The *Strong Communities* through the *Affordable Housing Act, 2011*, which made a number of amendments to the *Planning Act*, emphasizes to decision-makers that affordable housing is a key priority for the Province. In accordance with the Act, municipalities are required to establish O.P. policies and zoning by-law provisions allowing second units in detached, semi-detached and row houses, as well as in ancillary structures. Belleville's urban area is characterized by a

significant share of low-density housing, conducive to the development of second suites. Second suites offer an effective means to achieve intensification.

The demographic and socio-economic analysis provided in Chapters 2 and 3 suggests that the local market is evolving to include more opportunities for medium- and higher-density residential development, driven largely by demographic trends characterized by an aging population and declining average household size. The growing share of higher-density housing is a positive signal that the local market is maturing and opportunities exist for housing forms conducive to intensification. The forecast demographic trends identified for Belleville suggest that the demand for residential intensification will gradually increase over the next 20 years. Accordingly, a portion of new housing demand in Belleville is expected to be accommodated through intensification.

Figure 61 summarizes forecast intensification potential in accordance with identified supply and forecast demand. The percentage of housing development identified as intensification through infill/redevelopment within the built-up area is forecast to average approximately 20% of total housing construction, totalling 660 units. Of the intensification units forecast to be built over the 20-year period, 1% is expected to be low density, 14% medium density and 85% high density. Further, an estimated 100 units are expected to be accommodated through second-suite activity.¹ Intensification potential is forecast to gradually increase over the forecast period averaging approximately 38 units per year.

¹ Second suites, while typically accommodated in low and medium density housing units are considered high density housing potential due to an average P.P.U. that is similar to high density development.

Figure 61
City of Belleville
Forecast Urban Housing Growth, Intensification vs. Greenfield Development,
2018 to 2038

Location	Low Density ¹	Medium Density ²	High Density ³	Total	Proportionate Share of Total
Built Boundary (Intensification)	7	92	561	660	20%
Second Suites	0	0	100	100	3%
Greenfield Areas	1,725	545	269	2,539	77%
Total	1,732	637	930	3,299	100%

Source: Watson & Associates Economists Ltd., 2018.

¹ Singles and Semi-detached

² Townhouses

³ Apartments

There are a number of opportunities associated with increasing the proportion of development within the built-up area. Generally, many of these sites are serviced (or serviceable) with municipal water and sewer, offer good access to other hard infrastructure such as roads, indoor and outdoor recreation facilities, fire stations, schools, libraries, etc., and are within proximity to the downtown area which offers employment opportunities, shopping and entertainment. On the other hand, there are often challenges that can be associated with intensification, such as existing infrastructure capacity (for both hard and soft services), limited market demand, development feasibility, available policy tools/incentives and public perception. Given both the opportunities and challenges of accommodating intensification within the built-up area, a detailed review of these areas should be undertaken to ensure existing intensification policies will accommodate intensification goals. These should be supported by updated mapping as part of the Official Plan update.

7.2 Urban Residential Land Needs, 2018 to 2038

The purpose of this section is to determine Belleville's greenfield residential land needs over the next 20 years, based on the supply and demand analysis provided in Chapter 5 and section 7.1.

7.2.1 Policy Context

Requirements for long-term residential land needs for Ontario municipalities are set out in the 2014 P.P.S. Section 1.1.2 of the P.P.S. states that:

“Sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of up to 20 years. However, where an alternate time period has been established for specific areas of the Province as a result of a provincial planning exercise or a *provincial plan*, that time frame may be used for municipalities within the area.

Within *settlement areas*, sufficient land shall be made available through *intensification* and *redevelopment* and, if necessary, *designated growth areas*.”

Section 1.4.1 of the P.P.S. also states:

“To provide for an appropriate range and mix of housing types and densities required to meet projected requirements of current and future residents of the *regional market area*, planning authorities shall:

- a. maintain at all times the ability to accommodate residential growth for a minimum of 10 years through *residential intensification* and *redevelopment* and, if necessary, lands which are *designated and available* for residential development; and
- b. maintain at all times where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate *residential intensification* and *redevelopment*, and land in draft approved and registered plans.”

If the requirements of subsection 1.4.1 of the P.P.S. are not satisfied, subsection 1.1.3.8 of the P.P.S. states that:

“A planning authority may identify a *settlement area* or allow the expansion of a *settlement area* boundary only at the time of a *comprehensive review* and only where it has been demonstrated that:

- a. sufficient opportunities for growth are not available through *intensification*, *redevelopment* and *designated growth areas* to accommodate the projected needs over the identified planning horizon;
- b. the *infrastructure* and *public service facilities* which are planned or available are suitable for the development over the long term, are financially viable over their life cycle, and protect public health and safety and the natural environment;
- c. in *prime agricultural areas*:
 1. the lands do not comprise *specialty crop areas*;
 2. alternative locations have been evaluated, and
 - i. there are no reasonable alternatives which avoid *prime agricultural areas*; and

- ii. there are no reasonable alternatives on lower priority agricultural lands in *prime agricultural areas*;
- d. the new or expanding *settlement area* is in compliance with the *minimum distance separation formulae*; and
- e. impacts from new or expanding *settlement areas* on agricultural operations which are adjacent or close to the *settlement area* are mitigated to the extent feasible.”

One of the key objectives of this study is to address subsection 1.4.1 of the P.P.S. as it specifically relates to item (a) of subsection 1.1.3.8.

7.2.2 Urban Residential Land Needs

The City currently satisfies subsection 1.1.2 of the P.P.S. regarding the requirements to provide sufficient residential lands through intensification, redevelopment and designated growth areas to meet projected urban residential needs for a time horizon of up to 20 years, as summarized in Figure 62. Over the next 20 years (2018 to 2038), forecast housing demand (3,330 housing units, as identified in section 7.1) is anticipated to be less than the identified housing supply opportunities (9,560 units, as identified in Chapter 5), resulting in a surplus of approximately 6,260 housing units by 2038. In other words, it is anticipated that the City currently has a more than adequate supply of residential lands within its existing urban boundary to accommodate forecast housing demand over the next 20 years.

Figure 62
City of Belleville
Urban Residential Demand vs. Supply, 2018 to 2038

	Residential Units			
	Low Density ¹	Medium Density ²	High Density ³	Total
2018-2038 Housing Unit Demand	1,732	637	930	3,299
Housing Unit Supply	3,417	2,577	3,562	9,556
Housing Surplus/(Deficit)	1,686	1,940	2,632	6,257

Source: Watson & Associates Economists Ltd.

¹ Singles and Semi-detached

² Townhouses

³ Apartments

Figure 63 summarizes the urban greenfield residential land need (excluding identified intensification supply and demand potential), including the housing potential identified on designated residential lands within the Loyalist Secondary Plan Central Zone Area (totalling approximately 3,600 housing units). As shown, the City is expected to have a surplus of approximately 4,150 units by 2038 within its greenfield lands, assuming all the designated residential lands in the Loyalist Secondary Plan Area are included.

Figure 63
City of Belleville
Urban Greenfield Residential Demand vs. Supply, 2018 to 2038

	Residential Units			
	Low Density ¹	Medium Density ²	High Density ³	Total
2018-2038 Housing Unit Demand	1,725	545	269	2,539
Housing Unit Supply	3,413	2,174	1,104	6,691
Housing Surplus/(Deficit)	1,688	1,629	835	4,152

Source: Watson & Associates Economists Ltd.

¹ Singles and Semi-detached

² Townhouses

³ Apartments

While the Central Zone of the Loyalist Secondary Plan contains significant residential supply opportunities, the lands are not currently developable due to servicing cost challenges, as identified in the City's 2011 South Loyalist Secondary Plan Area-specific Development Charge Background Study and Area-specific By-law.¹ Excluding the Central Zone of the Loyalist Secondary Plan from the City's future residential land supply would result in a deficit of 267 low-density housing units by 2038, as illustrated in Figure 64.

¹ City of Belleville 2011 South Loyalist Secondary Plan Area-specific Development Charge Background Study and Area-specific DC By-law, September 26, 2011, Watson & Associates Economists Ltd.

Figure 64
City of Belleville
Urban Greenfield Residential Demand vs. Supply, 2018 to 2038
(Excluding Loyalist Secondary Plan Residential Supply within the Central Zone)

	Residential Units			
	Low Density ¹	Medium Density ²	High Density ³	Total
2018-2038 Housing Unit Demand	1,725	545	269	2,539
Housing Unit Supply	1,458	824	804	3,086
Housing Surplus/(Deficit)	(267)	279	535	547

Source: Watson & Associates Economists Ltd.

¹ Singles and Semi-detached

² Townhouses

³ Apartments

Given the cost challenges to extend municipal services into the Central Zone of the Loyalist Secondary Plan Area, alternative location options should be considered and evaluated for urban boundary expansion to accommodate urban residential growth over the 20-year forecast period. This includes evaluating alternative locations for future residential development north of Highway 401. This exercise should be completed during the next O.P. review. The City should continue to monitor its long-term residential land needs and urban servicing requirements throughout its O.P. review process.

Figure 65 summarizes the potential supply of housing units in draft approved and registered plans, plus intensification potential within the City of Belleville. This housing supply inventory represents Belleville's three-year housing supply requirement, as per subsection 1.4.1b of the 2014 P.P.S. Short-term housing demand has been derived from the 2018 to 2023 housing forecast. The analysis indicates that Belleville has an adequate supply of potential housing units in registered and draft approved plans and intensification to accommodate housing demand over the three-year period. Based on forecast housing demand, the City's potential housing supply in active development applications, plus identified intensification supply opportunities, can accommodate 22-years of future residential growth. It is important to note that if residential intensification opportunities are excluded from the supply, the City's years of potential residential land supply would be significantly reduced to 11 years.

Figure 65
City of Belleville
Three-Year Urban Housing Requirements
(Draft Approved/Registered Units + Intensification)

Total Supply of Draft Approved and Registered Housing Units	Intensification Potential Supply	Total Three-Year Housing Supply	Short-Term Housing Average Annual Demand ¹	Years of Supply (with intensification potential)	Years of Supply (without intensification potential)
2,114	2,349	4,463	199	22	11

Source: Watson & Associates Economists Ltd.

¹ Based on 2018-2023 housing forecast

Figure 66 summarizes Belleville's longer-term (i.e. 10 years) urban housing needs in accordance with subsection 1.4.1a of the P.P.S. The total residential supply potential represents all the designated urban residential lands (within the planning approvals process and vacant greenfield land), plus identified potential for intensification. Longer-term housing demand has been derived from the 2018 to 2028 housing forecast.

Similar to short-term housing needs, the analysis indicates that the City has a sufficient supply of designated residential lands plus intensification potential to accommodate housing demand over the next 10-years. Based on the 10-year housing demand forecast, the City of Belleville can accommodate housing demand for up to 50 years, assuming all the designated lands within the Loyalist Secondary Plan are included in the supply. If residential intensification/redevelopment opportunities are excluded from the supply, the City's years of potential residential land supply would be reduced to 38 years.

Figure 66
City of Belleville
Ten-Year Urban Housing Requirements
(Draft Approved/Registered Units/Vacant Designated Lands + Intensification)

Total Supply of Draft Approved and Registered Housing Units and Designated Residential Areas	Intensification Potential Supply	Total 10-Year Housing Supply	10-year Housing Average Annual Demand ¹	Years of Supply (with intensification potential)	Years of Supply (without intensification potential)
7,207	2,349	9,556	190	50	38

Source: Watson & Associates Economists Ltd.

¹ Based on 2018-2028 housing forecast

In accordance with the above, the City currently meets the requirements of subsection 1.4.1 of the P.P.S. Based on this assessment, the City of Belleville has sufficient residential supply opportunities to accommodate residential growth through 2038. Given the challenges to extend municipal services into the Central Zone of the Loyalist Secondary Plan Area, urban expansion requirements north of Highway 401 should be considered during the City's next O.P. review.

8. Commercial and Institutional Land Need

A key requirement of this M.C.R. is to undertake a detailed review of the vacant commercial and community facility lands which are potentially available for absorption and future long-term planning purposes. Accordingly, this Chapter provides a detailed review of Belleville's commercial and community facility land base, vacant community facility and commercial land supply and the City's ability to accommodate development over a short-term and longer-term period based on the employment growth identified in Chapter 6.

8.1 Commercial Land Profile

8.1.1 Estimated Trade Area

The City of Belleville has a strong commercial base serving a broad regional market with a trade area population of approximately 192,000.¹ Generally, the trade area encompasses communities along the Highway 401 corridor between the Town of Cobourg and the City of Greater Napanee, as well as communities north of Belleville and Trenton along Highways 7, 30, 33, 37 and 62.^{2,3} The population base of the trade area is primarily concentrated south of Highway 7. The population of this area increased modestly over the 2011 and 2016 period, adding a population of 2,100 (or an annual growth rate of 0.2%). The population growth in the trade area was largely concentrated in the City of Belleville, the eastern extent of Northumberland County,⁴ and to a lesser extent the City of Quinte West. Hastings County⁵ and Prince Edward

¹ Based on the 2016 Census.

² Trade area delineation for this study is based on a high-level estimate of the geographic extent that the City draws most of its customers and where market penetration is the highest. The trade area delineation has been informed based on previous market studies prepared for the two large municipalities with a regional retail base in the area, the City of Kingston and the City of Peterborough. Generally, the City of Belleville is estimated to serve the geographic area between the trade areas of Peterborough and Kingston with minimal overlap. The purpose of the trade area delineation for this study is to provide context of the surrounding area. While it is beyond the scope of this assignment, a more in-depth commercial market study would examine the potential overlap areas in more detail and delineate primary and secondary trade areas.

³ In addition to the City of Belleville, the trade area includes Hastings County, City of Quinte West, Prince Edward County, Municipality of Brighton, Municipality of Trent Hills and Cramahe Township.

⁴ Municipality of Brighton, Municipality of Trent Hills and Cramahe Township.

⁵ Excludes the City of Belleville and City of Quinte West.

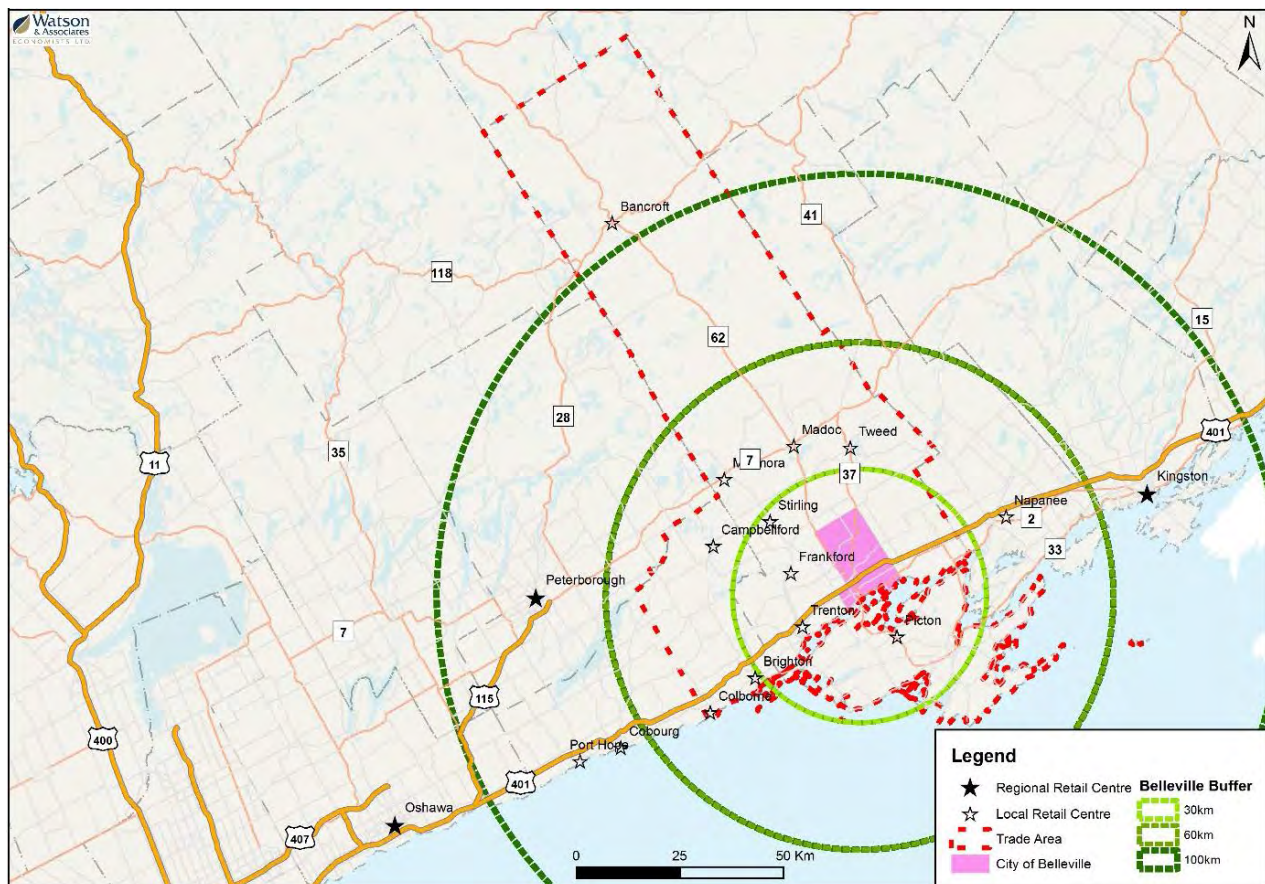
County experienced a decline in population over the 2011 to 2016 period. Over the next 20 years, it is anticipated that the bulk of population growth within this area will continue to be concentrated in the City of Belleville.¹

In terms of regional retail trade, the City of Belleville competes with the City of Peterborough to the northwest, the City of Kingston to the east, and to a lesser extent the City of Oshawa. Retail development has been particularly active in these Cities over the past few years with expansions of regional shopping malls and big box developments. Further, it is important to note the number of communities in, or near, the trade area with a retail base that attract customers from beyond a local area, specifically Trenton (City of Quinte West), Cobourg and Napanee. Over the past decade Cobourg, Trenton and Napanee have expanded their retail base with a greater emphasis on comparison goods retail (retail category referred to as G.A.F.O. (General Merchandise, Apparel, Furniture and Other Retailers)) which attracts customers from a greater distance than other retail categories, such as food store retail and personal services.

In addition, to serving a large retail trade area, the City of Belleville supports the surrounding area's tourism industry, with a number of attractions and overnight accommodations. The number of hotel rooms in the City has significantly increased over the past two years with the completion of a large hotel and expansions of other hotels/motels in the City. New attractions to the City enticing out-of-town visitors include the Shorelines Casino (opened in 2017) which, in addition to providing casino activities, accommodates large entertainment events.

¹ Based on a high-level review of population projections prepared for the municipalities in the trade area.

Figure 68
City of Belleville
Estimated Trade Area



8.1.2 City of Belleville Retail Base

As of 2018, it is estimated that the City has a retail base of approximately 4.1 million sq.ft. of built retail G.L.A. (Gross Leasable Area).¹ The retail base is comprised of purpose-built retail buildings² and ground floor uses in the downtown core.

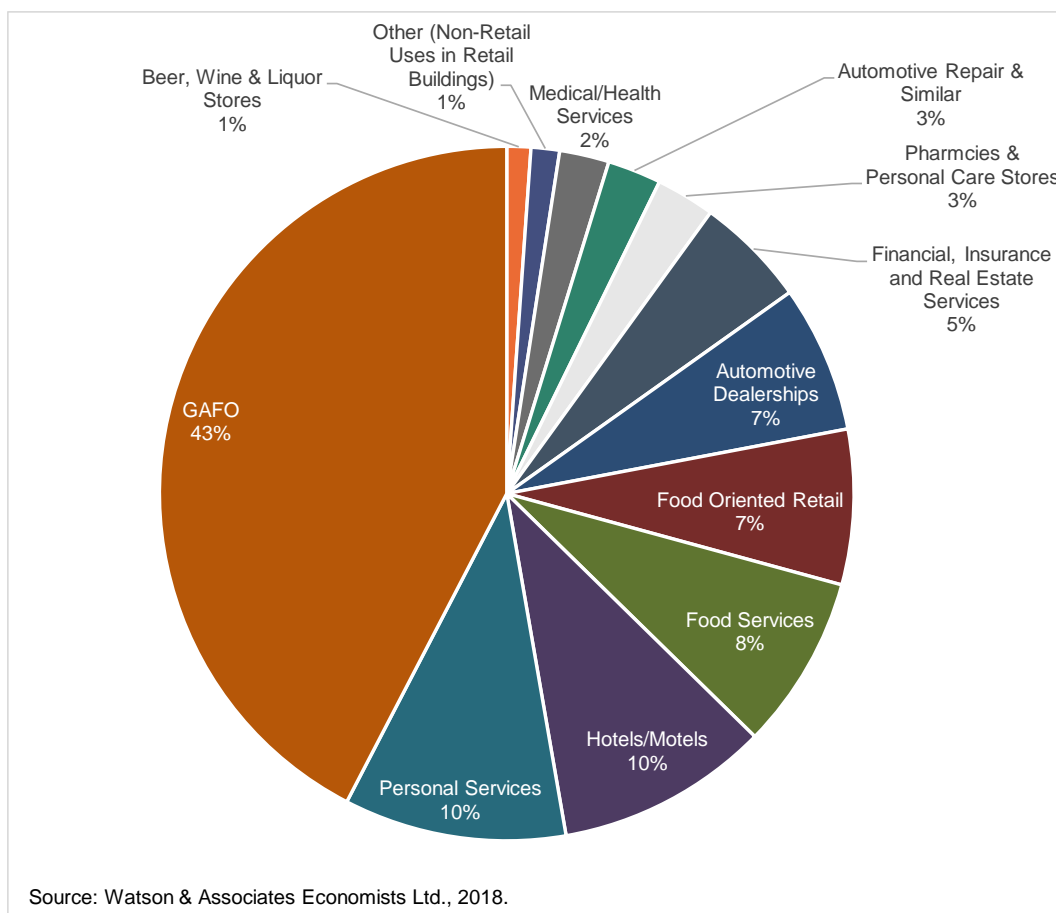
Approximately 8% of the retail space in the City of Belleville is currently vacant which suggests a balanced and healthy retail market. A healthy retail vacancy rate in a balanced market is typically less than 10%.

¹ With the exception of the Quinte Mall and the Bay View Mall, G.F.A. (Gross Floor Area) is generally synonymous with G.L.A. (Gross Leasable Area) in the City of Belleville context.

² Retail uses in multi-tenant industrial buildings and retail accessory space in industrial, office and institutional buildings are not included in the analysis.

Figure 69 summarizes the retail base by retail type. As summarized, a large portion (43%) of the built retail space accommodates G.A.F.O. retail uses,¹ as previously mentioned, G.A.F.O. attracts customers from a further distance for comparison shopping. Relative to the population base, the City of Belleville has a large G.A.F.O. retail base. On a per capita basis, the City of Belleville has approximately 30.2 sq.ft. of G.A.F.O. per resident. As a comparison, the City of Kingston had a slightly lower G.A.F.O. per capita at approximately 27.9 sq.ft. of G.A.F.O. per resident in 2015.²

Figure 69
City of Belleville
Occupied Retail Space by Category



¹ Examples of major retailers in the G.A.F.O. category include Walmart, Canadian Tire, Best Buy, Toys “R” Us, Home Depot, Home Hardware, Reitmans, Dollarama, Chapters, Sport Chek and Winners.

² Based on the City of Kingston Commercial Land Review Final Report, prepared by SGL Planning & Design Inc. and urbanMetrics Inc., March 2016.

The City's primary retail areas are discussed below followed by figures on the City's retail base by area, including a map of retail areas (Figure 70), distribution of retail space by area (Figure 71), vacancy rates by retail area (Figure 72) and a detailed summary of retail areas (Figure 73).

Bell Boulevard and the Millennium Parkway Retail Areas – Regional Retail Node

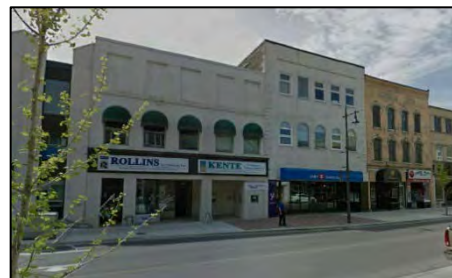
Collectively, the Bell Boulevard and the Millennium Parkway retail areas form a large regional retail node of approximately 1.9 million sq.ft. of retail space and represent 46% of the City's retail G.L.A. With proximity to the Highway 401 interchange, the City's Bell Boulevard retail node and Millennium Parkway retail area primary attract regional retail trade accounting for the bulk (75%) of the City's G.A.F.O. Quinte Mall, a large enclosed regional mall is a major anchor in the area. Surrounding the mall is a strip of retail plazas and big box stores along Bell Boulevard, forming a shadow of tenants to the mall. The Millennium Parkway retail area is a newer retail area north of Quinte Mall and Highway 401. Retail uses to the west of North Front Street includes a Lowe's Home Improvement Store and an automotive sales retail cluster. To the east of North Front Street includes a Walmart-anchored power centre. The current vacancy rate in Bell Boulevard is at 10%, while the Millennium Parkway area has no vacancy. Vacant retail space in the Bell Boulevard area is largely due to the recent closures of the Sears store at Quinte Mall (early 2018) and the Future Shop store (2015).



Bell Boulevard and the Millennium Parkway Retail Areas.

Downtown

The downtown area of Belleville represents 14% of the City's retail G.L.A. and includes a mix of retail uses with a large share of the retail space accommodating the City's personal services.¹ Other uses in the downtown area include storefront offices,² which represent 27% of the ground floor



Storefront office uses in the downtown.

¹ Examples of personal service establishments include barber shops, nail salons, spas, dry cleaners, funeral facilities, weight reduction centres and tattoo shops.

² Examples of office uses in the downtown include insurance agencies, banks, real estate firms, law offices, accounting offices and various medical/health, professional, scientific and technical services.

G.L.A. in the downtown. As summarized in Figure 72, the current vacancy rate in the downtown area is 15% which is considered high.

North Front Street Corridor (South of Bell Boulevard to North of College Street)

The North Front Street Corridor south of Bell Boulevard includes a linear strip of retail plazas and automotive-oriented retail uses, including grocery-anchored retail plazas, fast food drive-thru facilities, personal services facilities,¹ restaurants, automotive services and hotels/motels. Two of the City's five large supermarkets (Metro and Freshco) are



North Front Street Corridor.

located in this retail area serving the west end of the City. This area represents 12% of the City's retail G.L.A. and accounts for nearly a third of the City's food services G.L.A. space (30%). Vacant space in this area is limited, with a vacancy rate of 4%, as summarized in Figure 72.

Dundas Street East Corridor

The Dundas Street East Corridor includes the City's second enclosed mall (Bay View Mall) and a linear strip of retail plazas and automotive-oriented retail uses, including small retail plazas, fast food drive-thru facilities, personal services facilities, restaurants and automotive services. Two of the City's five large supermarkets (Food Basics and Your Independent Grocer) are located in this retail area.



Bay View Mall (approximately 200,000 sq.ft. GFA) converted from a plaza to an enclosed shopping mall in 1976.

This area represents 8% of the City's retail G.L.A.

The Dundas Street East Corridor is the primary retail area serving the east side of the City. The Corridor has the City's highest vacancy rate (16%) primarily due to the vacant space at Bay View Mall, an aging retail shopping mall which was developed from a plaza to an enclosed mall in 1976. It is important to note that a third of the occupied space at Bay View Mall is being utilized for non-retail uses, including medical/health care and institutional uses. The Bay View Mall site is approximately 6.3 ha and may provide an opportunity for redevelopment in the future.

Southwest Belleville

¹ Examples of personal service establishments include barber shops, nail salons, spas, dry cleaners, funeral facilities, weight reduction centres and tattoo shops.

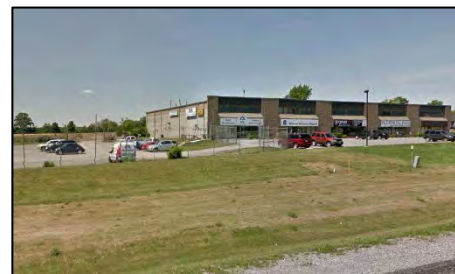
In the southwest area of Belleville, there are two smaller retail corridors, the Dundas Street West corridor and the College Street West corridor. In addition, the southwest has a small retail node surrounding the intersection of Bridge Street and Sydney Street.¹ Retail space in these areas primarily serves the needs of residents in the southwest area of the City and includes a mix of G.A.F.O., personal services, restaurants, automotive sales and services and pharmacies/personal care stores. This area represents 9% of the City's retail G.L.A. and its vacancy rate is among the lowest in the City at only 2%. While the area has a very low vacancy rate, it is important to note that over the years retail space has been converted to other uses. In 2000/2001, a large retail site (anchored by IGA and Zellers) on Dundas Street/Wall Bridge Loyalist Road was converted to non-retail uses to accommodate a large call centre, Stream International. Renewed demand for retail space in this area may be supported with the significant growth planned in the Loyalist Secondary Plan Area.



Stream Call Centre (89,000 sq.ft. G.F.A.), site of former retail centre.



Shorelines Casino in the northern portion of the Loyalist Secondary Plan Area opened in early 2017.



Multi-tenant industrial/commercial building with on-site storage. Highway 62 in the City's north end.

Other Retail Areas

Other retail areas in the City are primarily concentrated along the fringe of the City's Urban Serviced Area. These areas include lands along North Front Street in the north end, the northern portion of the Loyalist Secondary Plan in the City's west end, and lands in the Cannifton area in the City's northeast end. These lands accommodate commercial uses that are different than other commercial uses in the City. These commercial uses generally include commercial, recreation/entertainment, places of assembly and uses that are "quasi-industrial," whereby they have some elements of industrial uses (e.g. outdoor storage for equipment sales) and have a very low building coverage. Recently a new hotel, casino and donation outlet was built in the northern portion of the Loyalist Secondary Plan.

¹ Includes the retail plazas of Dundas & Sidney Square and Loyalist Market.

Figure 70
City of Belleville
Developed Commercial Lands

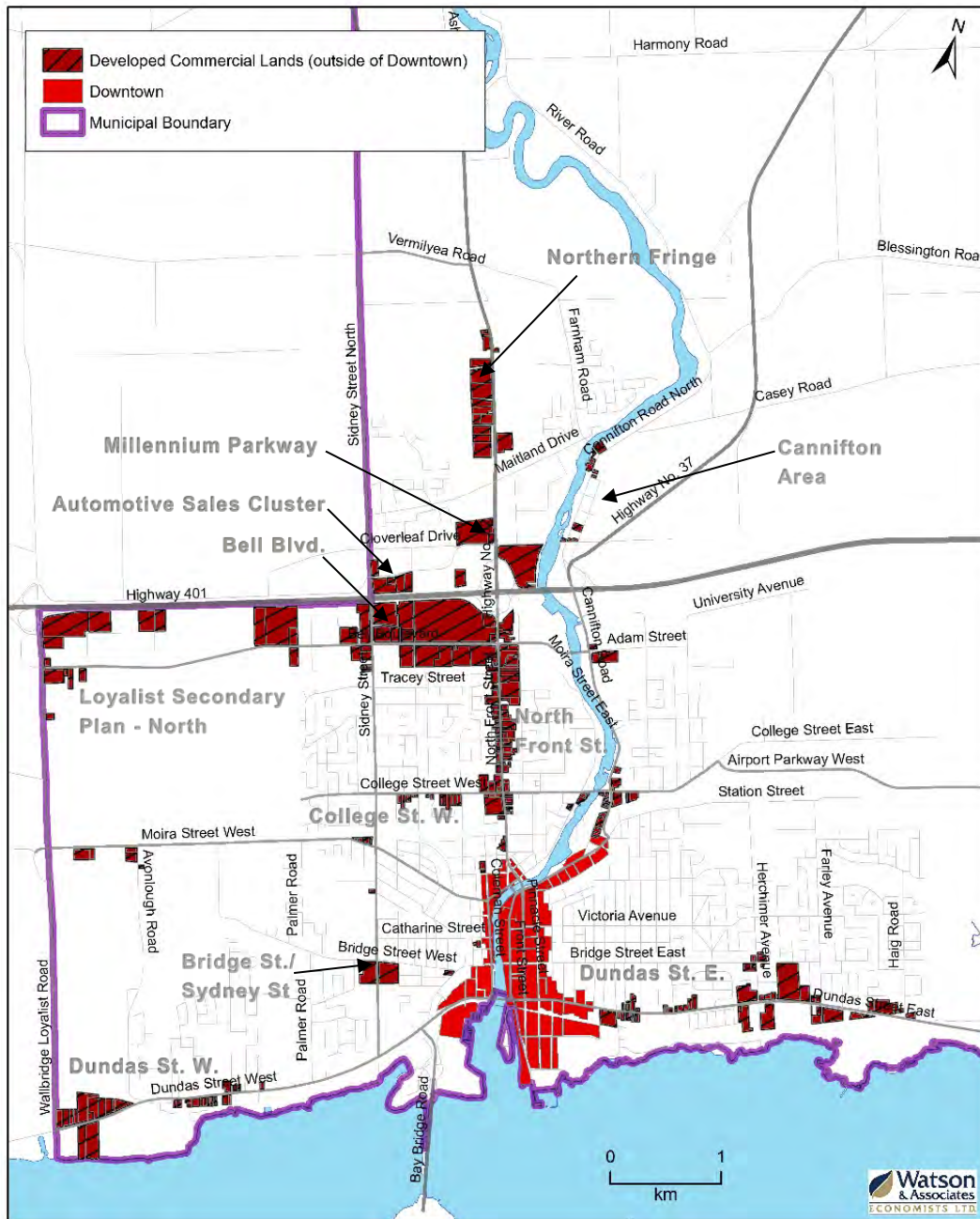


Figure 71
City of Belleville
Occupied and Built Retail Space by Location

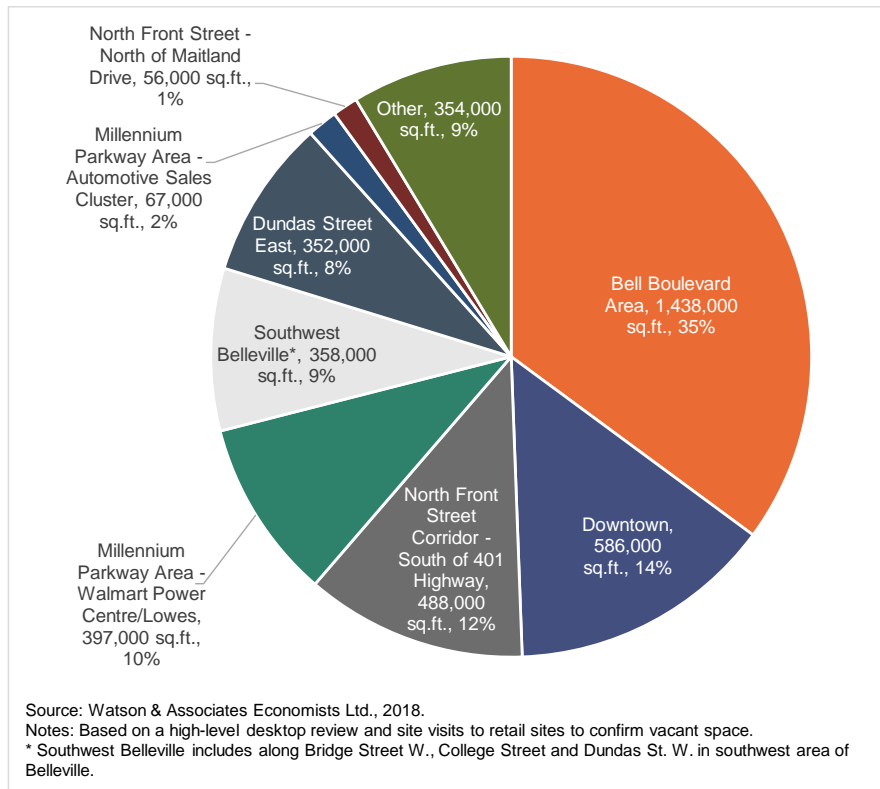


Figure 72
City of Belleville
Vacant Retail Space by Location

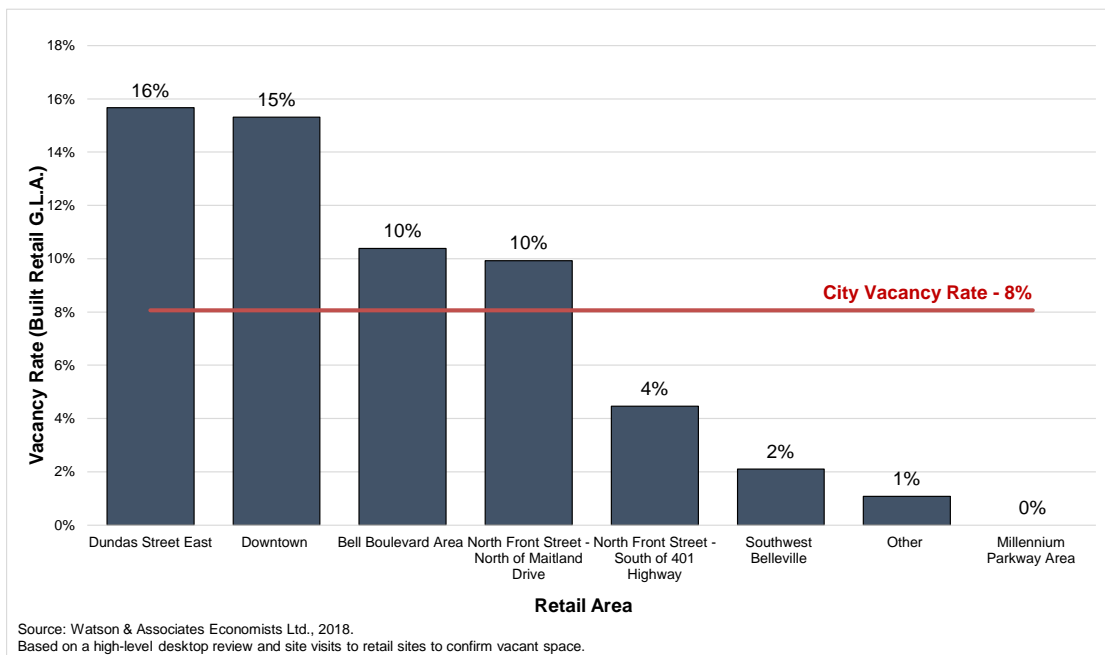


Figure 73
City of Belleville
Summary of Retail Areas

Retail Area	Occupied Retail and Service Space G.L.A. (sq.ft.)	Distribution (%) Retail and Service Space G.L.A. (sq.ft.)	Building Vacancy Rate	Major Retailers/Anchors	Available Vacant Land, ha
Bell Boulevard Area and Millennium Parkway Area - Regional Node					
Bell Boulevard Area	1,438,000	35%	10%	Quinte Mall, Home Depot, Canadian Tire, Staples, Toys "R" Us, Sports Chek, Chapters, No Frills, Best Buy, Bed, Bath & Beyond, Cineplex Theatres	9
Millennium Parkway Area - Walmart Power Centre/Lowes	397,000	10%	0%	Lowe's Home Improvement, Walmart, Giant Tiger, PetSmart, Reitmans	8
Millennium Parkway Area - Automotive Sales Cluster	67,000	2%	0%	Automotive Dealerships	
Bell Boulevard Area and Millennium Parkway Area - Regional Node, sub-Total	1,902,000	46%	8%		17
Downtown	586,000	14%	15%	Office	unknown
North Front Street Corridor - South of Highway 401	488,000	12%	4%	Metro, Freshco	0.2
Southwest Belleville*	358,000	9%	2%	Giant Tiger, TSC Hardware, Shorelines Casino, Loyalist College	12
Dundas Street East	352,000	9%	16%	Food Basics, Your Independent Grocer, Home Hardware	3
North Front Street - North of Maitland Drive	56,000	1%	10%		57
Other	354,000	9%	1%	Shorelines Casino, Loyalist College	146
Total	4,096,000	100%	8%		234

Source: Watson & Associates Economists Ltd., 2018.

*Includes retail along Bridge Street W., College Street and Dundas St. W. in southwest area of Belleville.

8.1.3 National and Local Retail Trends

There have been some major retail trends influencing the retail landscape across the Country, which generally will influence the demand for retail in Belleville. These trends are discussed below.

Increasing Productivity of Retail Stores

- Retailers are embracing the concept of “just-in-time retail” which involves using the latest technologies in controlling product inventory and applying scheduling techniques to provide the same product assortment with less real-estate square footage.
- While sales per square foot has been a typical measuring metric for store performance, retailers are now also evaluating store performance based on meeting other corporate objectives, including enabling e-commerce sales or creating a showroom for brand experiences.

Service-Based Retailers Leading Retail Growth

- The rise of e-commerce has influenced the demand for retail square footage, in particular the demand for retail goods. While e-commerce has been capturing market share from goods-based retailers, growth in service-based retailers continues as they provide social experiences and other services that cannot be purchased remotely. Service-based retailers¹ typically have smaller footprints than goods-based retailers and, therefore, have greater flexibility for intensification areas. These service-based retailers are driving the intensification of power centre and shopping centre sites across Canada by adding retail space to parking lots and occupying vacant retail space previously inhabited by goods-based retailers.

Small Store and “Right-Size” Store Format

- The majority of Canada’s top retailer players (e.g. Canadian Tire, Sobeys and Loblaw), which have traditionally been “big-box” retailers, have developed small-store prototypes that range in size from 5,000 to 20,000 sq.ft. The small-store prototype is about serving a more defined targeted demographic from a smaller local trading area and pursuing infill opportunities that may have been overlooked in the past. The small-store footprint provides developers with greater flexibility in incorporating retail into mixed-use developments and small infill retail sites.
- With the recent exit of large retailers (e.g. Sears, Target and Future Shop) in Canada, retail property owners are redeveloping or breaking up big-box retail buildings into multiple retail units. Further, over the past few years, retailers have been rationalizing retail networks which has led to some store closures and “downsizing” of leased space to a “right-sized” footprint (i.e. leased space is being subdivided).

¹ Service-based retailer refers to retail establishments that primarily provide an on-site service or where goods are consumed on-site, including food services (e.g. restaurants and bars), personal care services (e.g. hair salon), commercial recreational uses (e.g. fitness centres and movie theatres) and automotive services. Goods-based retailer refers to retail facilities that sell goods to be used or consumed at home, including food-oriented retail (supermarkets and convenience stores), beer, wine and liquor stores, pharmacies and personal care stores and G.A.F.O.

The following are recent local retail development trends over the past five years that have been occurring in the City of Belleville and are anticipated to continue:

- A large share (60%) of new retail G.L.A. has been occurring on existing retail sites through the expansion of existing facilities and the addition of retail pads;
- New retail development has primarily consisted of adding G.L.A. to accommodate the following retail uses: entertainment (including a casino), accommodation and food services, personal services, automotive services and fuel stations; and
- Major redevelopment of the Zellers retail plaza resulted in a greater share of personal services and other non-G.A.F.O. uses (such as a fitness centre, children's play centre and food services) compared to previous retail occupancy.

8.2 Commercial Land Needs

Figure 74 provides a high-level summary¹ of the City-wide demand for retail G.L.A., including the demand for G.A.F.O. retail space. As of 2018, the City of Belleville currently has a total of 3.4 million sq.ft. of retail G.L.A. in the City and a retail space per capita of 64.9 sq.ft. Over the 2016 to 2018 period, the change in occupied retail space in the City of Belleville amounted to approximately 37,000 sq.ft. (or 12,000 sq.ft. annually). The Sears department store of approximately 91,000 sq.ft. closed in early 2018 and has largely impacted on the occupied retail G.L.A. since 2016. Further occupied new construction retail space since 2016 amounted to less than 129,000 sq.ft.² Retail activity over the decade has largely included redevelopments, store relocations and re-occupied leased space in the City of Belleville.

Over the next 20 years, the City is anticipated to slightly increase its retail space per capita to 65.5 sq.ft. to the 2016 level, as summarized in Figure 74. The retail G.L.A. growth forecast is based on modest growth in the broader trade area (i.e. the trade area outside the City of Belleville), occupancy of the vacant Sears department store space,³ a City-wide vacancy rate of less than 10%, and national trends in the retail sector, as

¹ The purpose of this analysis is to examine the future need for retail space based on forecast population growth and assuming a slight increase in retail space per capita based on historical and anticipated trends. As previously mentioned, it is beyond the scope of this study to provide an in-depth commercial market study. An in-depth market study would examine the demand on a more granular level and review retail expenditure inflows and outflows.

² Based on building permit activity and estimated timing of occupancy.

³ Sears retail space is prime retail real estate and it is assumed the space will be occupied in the short term.

previously discussed. Growth in the City's retail space will largely be driven by its local population base and the demand for non-G.A.F.O. retail space.

Figure 74
City of Belleville
Retail G.L.A. Demand, 2018 to 2038

Year	Population ¹	Total Occupied Retail G.L.A. ²			G.A.F.O. G.L.A. ⁴		Non-G.A.F.O. G.L.A. ⁵	
		Total G.L.A., sq.ft.	Retail G.L.A. per Capita ³	Annualized Change in Retail G.L.A. per Capita Since 2016	G.A.F.O. sq.ft.	G.A.F.O. G.L.A. per Capita	Non-G.A.F.O. G.L.A., sq.ft.	Non-G.A.F.O. G.L.A. per Capita
2016	51,900	3,397,000	65.5					
2018	52,900	3,434,000	64.9	-0.18	1,596,000	30.2	1,838,000	34.7
2023	54,900	3,565,000	64.9	-0.07	1,650,000	30.1	1,915,000	34.9
2028	56,400	3,680,000	65.2	-0.02	1,695,000	30.0	1,985,000	35.2
2033	57,500	3,763,000	65.4	0.00	1,727,000	30.0	2,036,000	35.4
2038	58,200	3,814,000	65.5	0.00	1,748,000	30.0	2,066,000	35.5

Source: Watson & Associates Economists Ltd.

¹ Population includes Census Undercount. Census Undercount estimated at approximately 2.5%.

² Excludes non-retail uses in retail buildings (medical/health, government and financial/insurance and real estate) and vacant retail space.

³ Based on ratio of occupied retail space over population.

⁴ G.A.F.O. (General Merchandise, Apparel, Furniture and Other Retailers), comparison retail. Examples of retail uses include home improvement stores, department stores, furniture stores, apparel stores and general merchandise stores.

⁵ Excludes G.A.F.O. (General Merchandise, Apparel, Furniture and Other Retailers), comparison retail. Includes personal services, accommodations and food services, automotive sales/repair, food store retail, pharmacies and personal care stores and beer/wine/liquor stores.

⁶ Based on annual average over the 2016 to 2018 period and an annual average over the 5-year forecast periods.

As summarized in Figure 75, the incremental G.L.A forecast City-wide for retail space over the 2018 and 2038 period is 380,000 sq.ft. and the corresponding employment growth of 760 employees.¹ It is forecast that the bulk of retail employment will occur on designated commercial lands, estimated at approximately 90%. A small portion of retail employment will occur on employment lands as employment land supportive uses. Further, it is forecast that a portion, 30% of retail G.L.A., will be accommodate through intensification on existing commercial sites and in the downtown area. As summarized, approximately 245,000 sq.ft. of retail development (490 employees) is forecast to be accommodated on designated commercial lands adjusted for intensification. Based on a retail demand of 245,000 sq.ft. and a building coverage assumption of 25%,² approximately 9 ha of designated commercial lands are required to support retail demand over the forecast period.

Figure 75
City of Belleville
Retail Land Demand on Designated Commercial Lands

Growth Period	Total Retail G.L.A. Increment, sq.ft.	Retail Employment Growth		Retail Demand on Designated Commercial Lands				
		City-Wide ¹	Designated Commercial Lands ²	G.L.A. sq.ft.	G.L.A. sq.ft. Accommodated by Intensification ³ - 30%	G.L.A. sq.ft. Adjusted for Intensification	Land Area, ha	Building Coverage
2018-2023	131,000	262	236	118,000	35,000	83,000	3.1	25%
2018-2028	246,000	492	418	209,000	63,000	146,000	5.4	25%
2018-2033	329,000	658	592	296,000	89,000	207,000	7.7	25%
2018-2038	380,000	760	699	350,000	105,000	245,000	9.1	25%

Source: Watson & Associates Economists Ltd.

¹ Includes employment growth accommodated on employment lands and designated commercial lands.

² An average of 90% of City-wide retail employment forecast is accommodated on commercial lands.

³ Includes retail employment growth accommodated on existing commercial sites and in the downtown area.

¹ Based on retail floor space per worker (F.S.W.) of 500 sq.ft.

² The average building coverage on designated commercial lands (excluding the downtown) in the City of Belleville is approximately 23%.

In addition to retail employment, office and institutional uses are anticipated to be accommodated on designated commercial lands. It is assumed that institutional uses on commercial lands will primarily include uses that will have a comparable density to office uses, including government/public administration offices and health care/medical offices. As summarized in Figure 76, approximately 490 office and institutional employees are forecast to be accommodated on designated commercial lands, with 40% of employment on existing commercial sites and in the downtown area. Adjusted for demand accommodated through intensification, office and institutional uses on designated commercial lands are expected to require approximately 5 ha of land over the forecast period, a minimal amount of land.

Figure 76
City of Belleville
Office and Institutional Demand on Designated Commercial Lands

Growth Period	Office Employment Growth	Institutional Employment Growth	Total Office and Institutional Employment Growth	Employment Growth Adjusted for Intensification	Density (jobs/net ha)	Land Area, ha
2018-2023	112	70	182	109	60	1.8
2018-2028	208	125	332	199	60	3.3
2018-2033	237	168	406	243	60	4.1
2018-2038	299	189	488	293	60	4.9

Source: Watson & Associates Economists Ltd.

¹ Includes employment growth accommodated on existing commercial sites and growth in the downtown area.

The total demand for commercial designated land is approximately 14 hectares. As previously discussed, a large share of employment growth on commercial lands is anticipated to occur in the downtown area and on existing sites (overall average of retail, office and institutional growth to be accommodated through intensification on commercial sites/downtown area is 34%). Based on the vacant designated commercial land supply identified, the City has sufficient designated vacant commercial land to accommodate forecast demand, as summarized below in Figure 77.

Figure 77
City of Belleville
Commercial Land Need (Demand vs. Supply), 2018 to 2038

Growth Period	Total Commercial Demand, ha	Total Vacant Commercial Designated Land Area, ha	Net Surplus/ (Shortfall), ha
2018-2023	4.9	234	229
2018-2028	8.7	234	225
2018-2033	11.7	234	222
2018-2038	14.0	234	220

Source: Watson & Associates Economists Ltd.

Note: Based on commercial demand identified in Figures 75 and 76.

8.3 Community Facility Lands Profile

Belleville's Community Facility lands are intended to accommodate significant community or institutional uses such as government facilities, hospitals, seniors' homes, schools, places of worship, cemeteries, EMS facilities, theatres and community/recreation facilities. Community and institutional uses can also be accommodated on other designated lands throughout the City, including the downtown core, residential lands and commercial designated lands.

The City currently has 250 net ha (618 net acres) of developed Community Facility designated lands. The lands currently house a number of major institutional employers in the City, including Quinte Healthcare Corporation, Loyalist College, Hastings Manor, Belcrest Nursing Home and the Sir James Whitney School for the Deaf.

8.4 Community Facility Lands Needs

Over the 2018 to 2038 period, Belleville's institutional employment base is forecast to increase by 630 jobs. Based on existing and forecast trends, it is estimated that 45% of this employment will be accommodated on Community Facility designated lands. The remaining 55% of institutional employment is expected to be accommodated within the downtown core, residential lands, commercial designated lands and industrial lands. Based on this allocation, over the 2018 to 2038 period, employment growth on Community Facility designated lands is expected to total 350 employees, representing a land demand of 10 net ha (25 net acres), as shown in Figure 78. Based on the identified supply of 32 net ha (80 net acres), the City has sufficient vacant designated Community Facility lands to meet forecast demand over the next 20 years.

Figure 78
City of Belleville
Community Facility Land Needs,
2018 to 2038

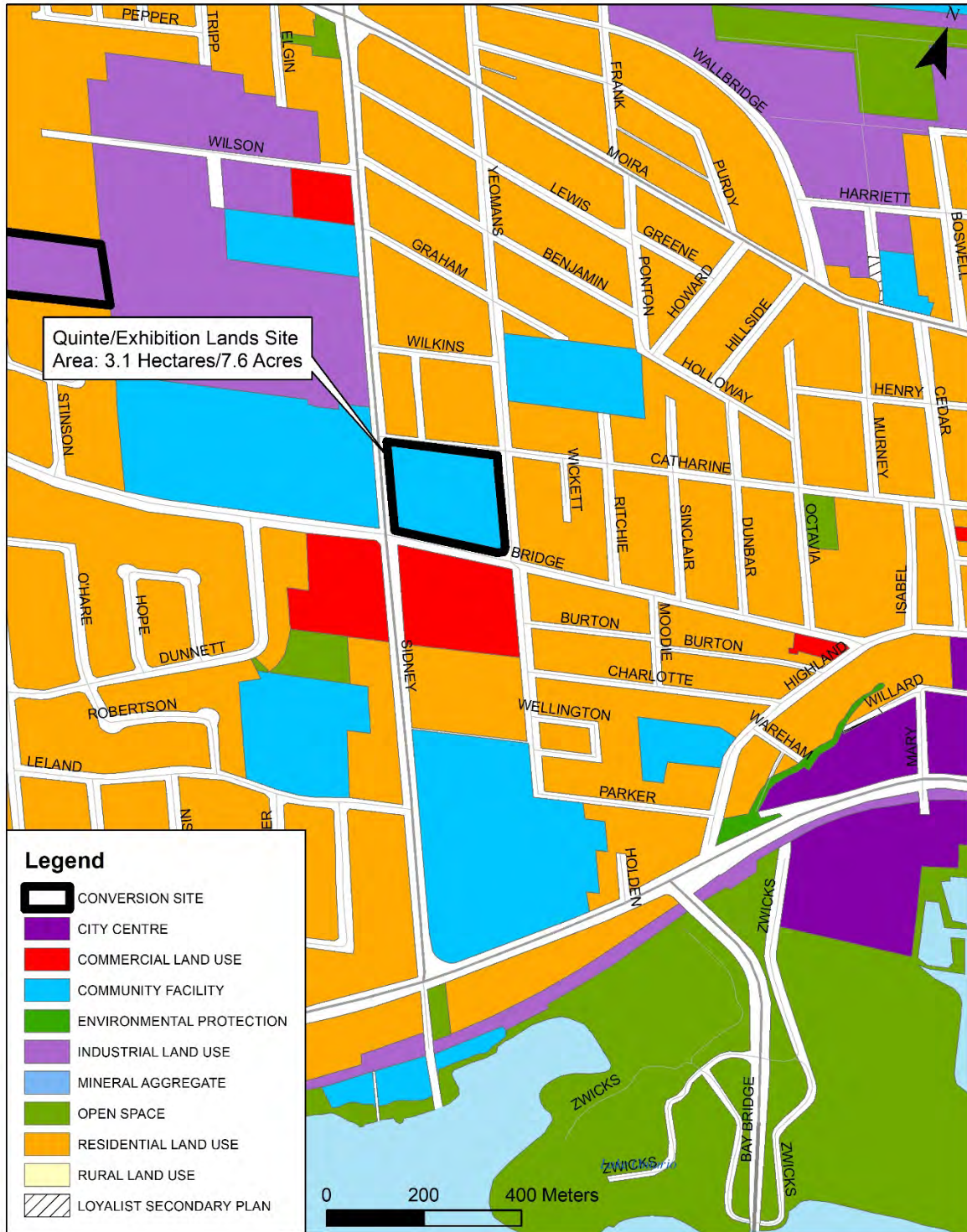
Growth Period	Employment Growth on Community Facility Designated Lands	Employment Density (jobs/net ha)	Community Facility Land Demand, ha	Community Facility Land Supply, ha	Net Surplus/Shortfall, ha
2018-2023	115	35	3.3	32	28.7
2018-2028	228	35	6.5	32	25.5
2018-2033	309	35	8.8	32	23.2
2018-2038	346	35	9.9	32	22.1

Source: Watson & Associates Economists Ltd.

Note: 55% of institutional employment is expected to be accommodated within the downtown core, residential lands, commercial designated lands and industrial lands.

The City of Belleville has identified a site, 18 & 40 Yeoman Street (southern portion of the “Quinte Exhibition Lands”), as a site for potential redesignation from community facility to commercial use. The total land area is approximately 3.1 hectares (7.6 acres). These lands are currently owned by the City and were previously used for recreational purposes. The City has recently demolished the existing buildings on this site. As illustrated in Figure 79, these lands are located opposite the Sidney Street and Bridge Street retail area in the City’s southwest. Based on a high-level review, the subject lands would form an extension of the retail uses north of Bridge Street at Sidney Street. The extension of the retail node will provide the opportunity to strengthen the retail offering in the area, an area with limited retail options (e.g. no grocery store) and a very low retail vacancy rate. As discussed previously, the City has a significant supply of vacant designated community facility lands. As such, the reduction of designated community facility lands is expected to have minimal impact.

Figure 79
City of Belleville
Potential Employment Land Conversion Site –
Community Facility Use to Commercial Use
18 & 40 Yeomans Street



9. Employment Land Needs

A key purpose of developing an M.C.R. for the City of Belleville is to create a long-term vision and plan for future employment lands within the City, in keeping with the provincial policy direction provided under the 2014 P.P.S. A key objective of this component of the study is to analyze the adequacy of the existing employment land supply within the City and determine the need to designate new Employment Areas to accommodate long-term growth.

Employment lands are defined herein as lands designated in the City's O.P. as "Industrial Land Use."¹ The City also has a rural land-use designation for lands located outside the Urban Serviced Area that includes policies permitting smaller-scale industrial development.²

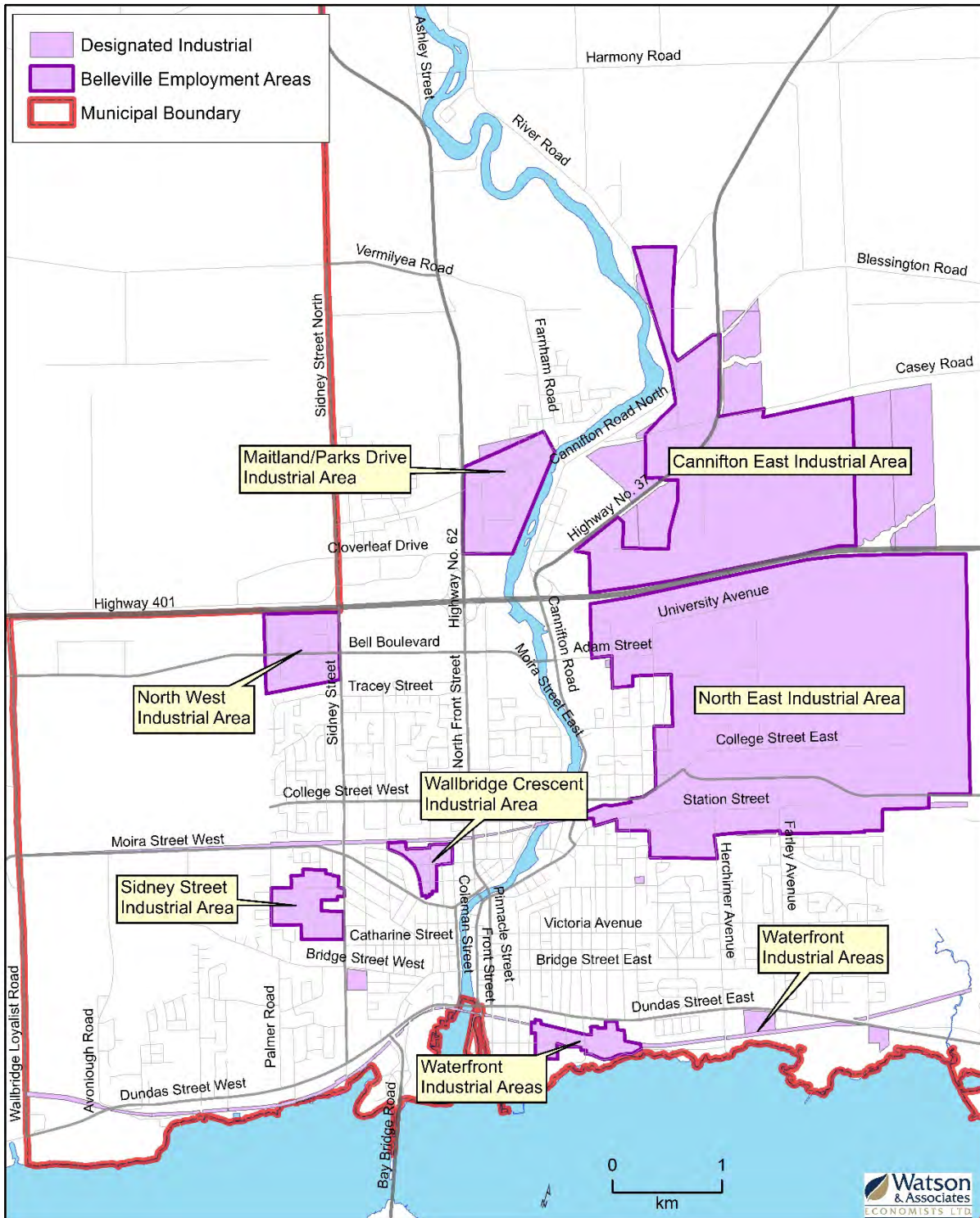
9.1 Employment Lands Profile

Employment lands are an integral part of Belleville's economic development potential and accommodate a significant share of the municipality's businesses and employment. Belleville's employment lands are organized into seven delineated industrial/ business park areas, as presented in Figure 80.

¹ City of Belleville Official Plan (February 2002).

² Ibid., Policy 3.3.4.: Rural Commercial/Industrial and Outdoor Recreation Policies.

Figure 80
City of Belleville
Delineated Employment Areas



The City's newer Employment Areas, including Cannifton East Industrial Area, Maitland/Parks Drive Industrial Area, North East Industrial Area and North West Industrial Area, are situated in proximity to Highway 401. The City's older Employment Areas, including Sidney Street Industrial Area and the Waterfront Industrial Areas, are located closer to the City's urban core and waterfront.

Belleville has 568 net ha (1,404 net acres) of developed employment land within its Urban Boundary with a large share in proximity to the Highway 401 corridor. Employment lands within Belleville accommodate a broad range of industrial uses including manufacturing, distribution/logistics, construction and transportation, as well as commercial office, employment supportive and institutional uses.

The following provides an overview of Belleville's key employment areas.

Cannifton East Industrial Area

The Cannifton East Industrial Area is situated in the City's northeast with proximity to Highway 37 and Highway 401. The Employment Area is comprised of two distinctive areas. The northern portion (north of Highway 37) includes a cluster of industrial occupants situated along Tank Farm Road. Purolator Courier, Northumberland Grain, Hewitt Material Handling, Reid Fuels and Imperial Oil Distribution Terminal are among



Imperial Oil Distribution Terminal,
121 Tank Farm Road.

the industrial occupants in this area. The southern portion (south of Highway 37) of the Employment Area includes a cluster of industrial occupants along Putman Industrial Area. A quarry pit operated by Lafarge Canada covers a large portion of the occupied land area of this Employment Area. Other industrial tenants include a logistics company and a waste management operation. The Black Diamond Cheese manufacturing plant, while located in this Employment Area, is isolated from the rest of the developed uses and is surrounded by undeveloped land. While largely undeveloped, this Employment Area provides limited opportunity for future industrial development due to servicing constraints.¹ Further, it is important to note that



Northumberland Grain Inc., 61
Tank Farm Road.

¹ Refer to Appendix F for the Water and Wastewater Infrastructure Review.

developed employment land in this area includes heavy industrial uses that limit the potential to attract a broad range of employment uses.

North East Industrial Area

The North East Industrial Area is the City's largest Employment Area with a developed land base of 331 ha (819 acres) and 4.5 million sq.ft. of industrial space. Located in proximity to Highway 401, the park caters to light and medium industrial uses. With an employment base of approximately 5,000 jobs,¹ the park is home to many of the City's largest private-sector employers including a Procter & Gamble Inc., Kellogg Canada,

Redpath Sugar, Cascades, Vantage Foods, Autosystems (Magna) and Hannon Systems Canada. The park has a significant presence of manufacturing, transportation/wholesale trade and distribution. The park has experienced relatively strong industrial development activity over the past decade. Recent development has included a new FedEx terminal, the expansion of the Procter & Gamble Inc. plant, and the expansion of two food manufacturing plants (Kellogg and Vantage Foods).



Autosystems Autoparts Plant
(Magna International), 200
Jamieson Bone Road.



Site of former Sears Warehouse
and Distribution Centre, 500
College St. E.

Due to the recent (early 2018) closure of Sears in Canada, the Sears Warehouse and Distribution Centre (approximately 1.5 million sq.ft.) ceased operations in Belleville. The Sears site is still currently vacant and provides opportunity to accommodate future employment growth. Largely due to the vacant space of the Sears Warehouse and Distribution Centre, the vacancy rate is approximately 38% in the North East Employment Area. Excluding the Sears vacant space, the vacancy rate in the North East Employment Area is approximately 6%.

Maitland/Parks Drive Industrial Area

The Maitland/Parks Drive Industrial Area is a small Employment Area (11 gross ha or 27 acres) in the City's northwest with approximately 5.4 net ha (13 net acres) of vacant employment land. The Employment Area includes small industrial occupants that

¹ Based on business survey data provided from the City of Belleville.

operate in multi-tenant buildings, workshops and utilize construction laydown yards for storage.

North West Industrial Area

The North West Industrial Area is a small employment area (approximately 24 gross ha or 56 acres) with a cluster of industrial occupants along Bell Boulevard and east of Sydney Street. The Employment Area has a limited amount of vacant land available for development (2 net ha). The vacancy rate is estimated at approximately 8% due to one large vacant industrial building of 51,000 sq.ft. Industrial occupants of the area include a mix of small and medium-sized businesses engaged in manufacturing, construction and logistics. Major employers in the area include an autoparts maker, Autosystems (Magna) and Wilson/Amer Sports which operates a distribution centre.



Loomis/Canpar Courier, 100 Hanna Court.

Other Industrial Areas

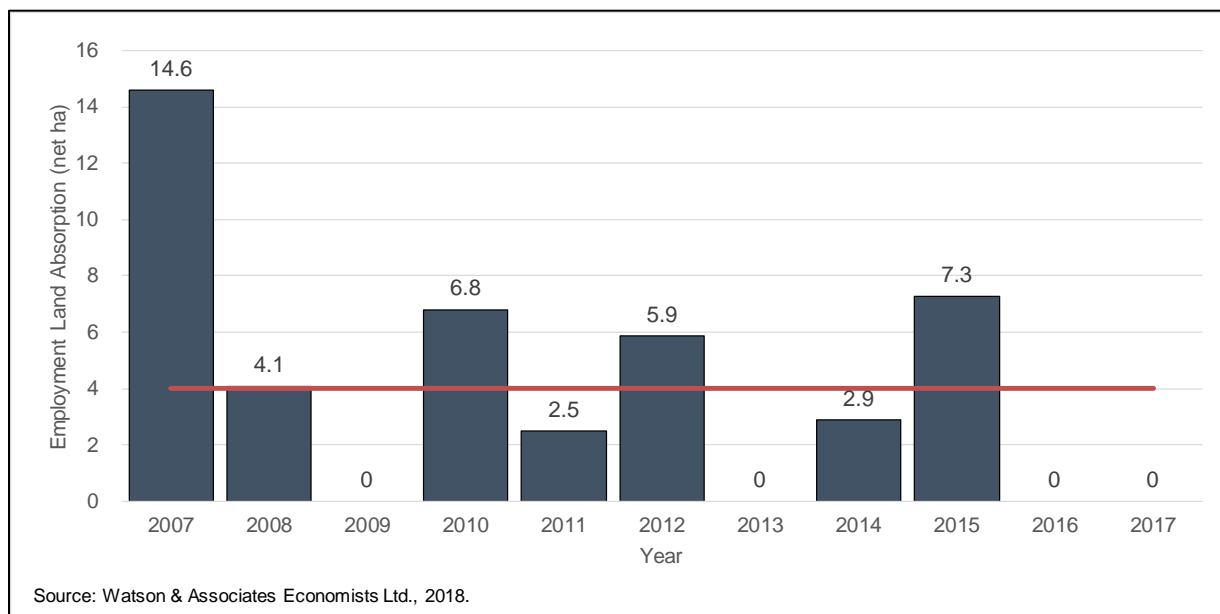
Other industrial areas in the City are mature industrial areas and provide limited opportunity in terms of vacant employment land to accommodate future employment lands employment. Over the years these Employment Areas have become fragmented and are surrounded by non-industrial uses. The Sidney Street Industrial Area, for example, is surrounded by residential uses and is located adjacent to the Quinte Exhibition Lands and an elementary school.¹ The Waterfront Industrial Areas have also become fragmented and these remaining industrial sites may provide opportunities for non-industrial redevelopment. The Waterfront Industrial Areas are identified in the City of Belleville Official Plan as Special Policy Area 1, Bayshore Planning Area. The O.P. allows for a transition of these industrial uses to other uses based on objectives set out for the Special Policy Area.

¹ The Quinte Exhibition lands are currently under review by the City for feasibility of servicing to support redevelopment.

9.2 Employment Lands Absorption

Error! Reference source not found.⁸¹ summarizes annual absorption of employment lands within Belleville over the past decade (i.e. 2007 to 2017). As illustrated, over this period, employment land absorption levels have averaged approximately 4 net ha (10 net acres) per year. The majority of land absorption over the past decade has been accommodated within the North East Industrial Park.

Figure 81
City of Belleville
Historical Employment Lands Absorption



9.3 Employment Lands Competitiveness

Municipalities compete directly for business attraction with other communities in their respective regional market areas and beyond. This is particularly true for “export-based” sectors in the industrial and knowledge-based sectors which are largely accommodated in Employment Areas.

Market competitiveness is typically driven by a broad range of factors which can strongly influence business location decisions, both for new development and expansion. This includes the following broad community level criteria:

- “Hard” factors – development costs (e.g. land costs, construction costs) and operating costs (e.g. property taxes, utilities’ costs); and
- “Soft” factors – proximity and access to major infrastructure, labour force, access to post-secondary institutions, availability of developable land and quality of life.

Belleville benefits from its location along Highway 401, which serves as Canada's major trade corridor and links major urban centres in Ontario and Quebec to the U.S. Belleville's employment lands are centrally located to serve major North American employment markets in eastern Ontario, Quebec and the north-eastern U.S. An efficient, dependable transportation and distribution network is an increasingly critical factor in location decisions for industrial-oriented sectors of the economy.

Belleville has a number of competitors along the Highway 401 corridor in central Ontario with which it competes for business attraction and retention. These municipalities also offer location and other regional attributes that appeal to prospective international and local firms. The degree to which Belleville can capitalize on its regional location advantages will depend largely on the competitiveness of its employment lands.

Belleville's municipal competitiveness is explored herein in comparison to a number of municipalities within the surrounding market area, including:

- City of Kingston;
- City of Quinte West;
- Town of Greater Napanee; and
- Northumberland County.

Belleville's competitive position is evaluated based on a review of labour force characteristics, supply of industrial lands and industrial development and operating costs, as discussed below.

9.3.1 Labour Force Characteristics

The availability of a local skilled labour force is an increasingly important location factor in the "new economy." Having a labour force that meets the needs and demands of current and future business is essential to the competitiveness of a community or region in attracting industry and job creators.

Figure 82 summarizes the proportion of the population that is of working age (20 to 64 years of age) by select municipality. As shown, Belleville's proportion of population which is of working age is comparable to the survey average (58% of total population), higher than Greater Napanee and Northumberland but lower than in Kingston and Quinte West.

Figure 82
Working Age Population within Select Municipalities

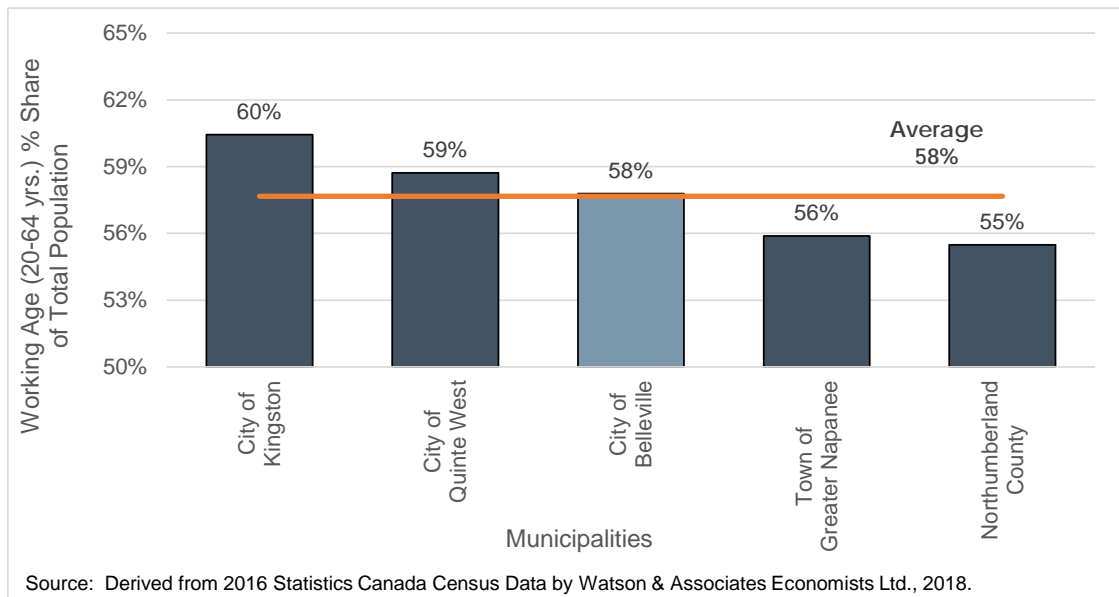
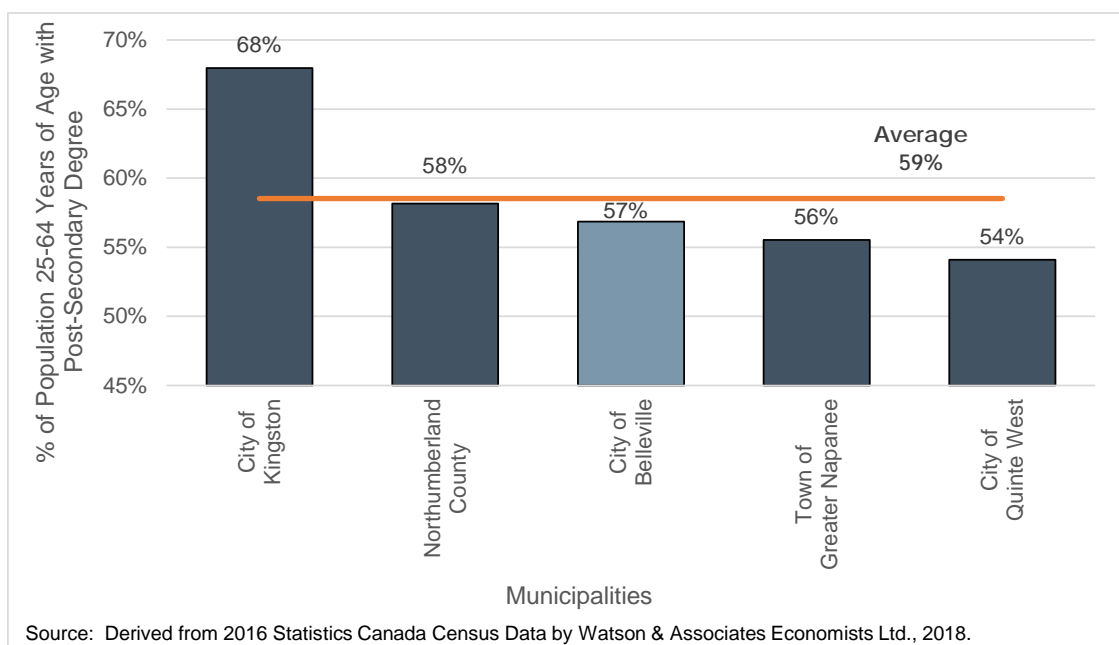


Figure 83 summarizes the proportion of the population (25 years and older) in Belleville and the surveyed municipalities that have a post-secondary degree, including a university or college degree or diploma. As shown, 57% of Belleville’s population aged 25 and older has a post-secondary degree, higher than Greater Napanee and Quinte West but lower than in Kingston and Northumberland.

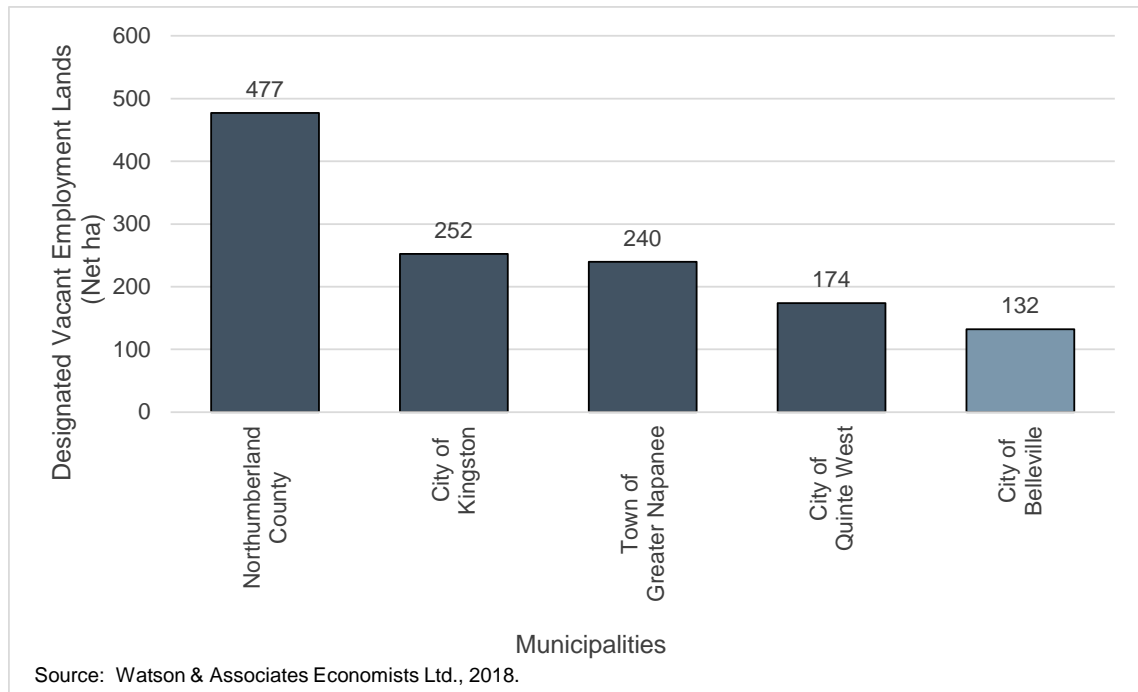
Figure 83
Population over the Age of 25 with a Post-Secondary Degree Within Select Municipalities



9.3.2 Supply of Vacant Employment Lands

The competitiveness of Belleville's export-based economy is partly determined by the availability and quality of its developable employment lands. Figure 84 provides a summary of the designated employment lands supply within Belleville and the surveyed municipalities in the surrounding market area. As shown, Belleville has 132 net ha (326 net acres) of designated vacant employment land, the least among the surveyed municipalities. Northumberland County has the most vacant designated employment land of the municipalities surveyed with 477 net ha (1,179 net acres), followed by Kingston with 252 net ha (623 net acres), Greater Napanee with 240 net ha (593 net acres) and Quinte West with 174 net ha (430 net acres).

Figure 84
City of Belleville and Surrounding Market Area Municipalities
Total Designated Vacant Employment Land



9.3.3 Cost of Development

A significant factor influencing business decisions on where to locate is the cost competitiveness (both capital investment and operating costs) of the development in relation to the market demand and potential return on investment.

On a regional level, cost competitiveness for business is largely associated with macro-economic factors such as wage rates, corporate income taxes and the dollar exchange rate. On a municipal level, cost competitiveness varies based on a number of factors, including land prices, development charges (D.C.s), property tax rates and utility costs. Industrial land prices, D.C.s/impost fees and property taxes are explored herein from an industrial development perspective.

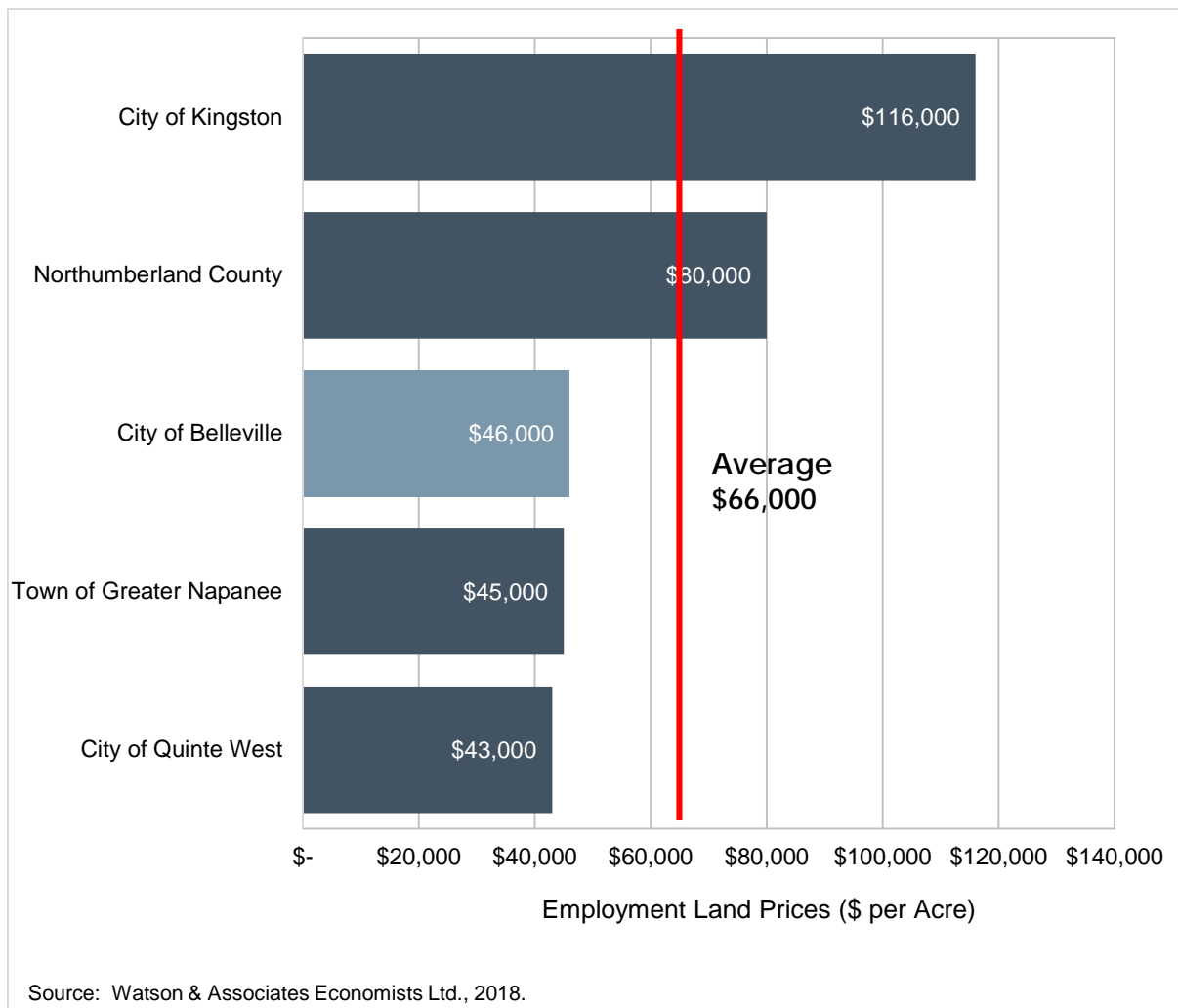
Price of Serviced Employment Land

From a competitiveness perspective, land prices can provide a key advantage, especially for land expansive uses such as transportation, wholesale trade/logistics, warehousing and large-scale manufacturing. Though competitive land costs provide an economic advantage in terms of the cost of development, very low land prices may be indicative of low demand. It is important to note that the majority of the municipalities in Eastern Ontario, in particular Quinte West, Kingston and Brighton (Northumberland County) sell municipally-owned industrial lands at below market average to attract employment land development. As such, maintaining a supply of municipally-owned employment in the City of Belleville is critical for the City in maintaining its competitiveness in the broader market area.

Figure 85 summarizes employment land prices (\$/serviced acre) for the City of Belleville and the surveyed municipalities based on recent market survey data. Key findings include:

- As illustrated, serviced employment land prices in Belleville average \$46,000 per acre, which is among the lowest surveyed, along with Quinte West and Greater Napanee; and
- In comparison, employment land prices in Northumberland and Kingston are significantly higher, averaging \$80,000 and \$116,000 per acre, respectively.

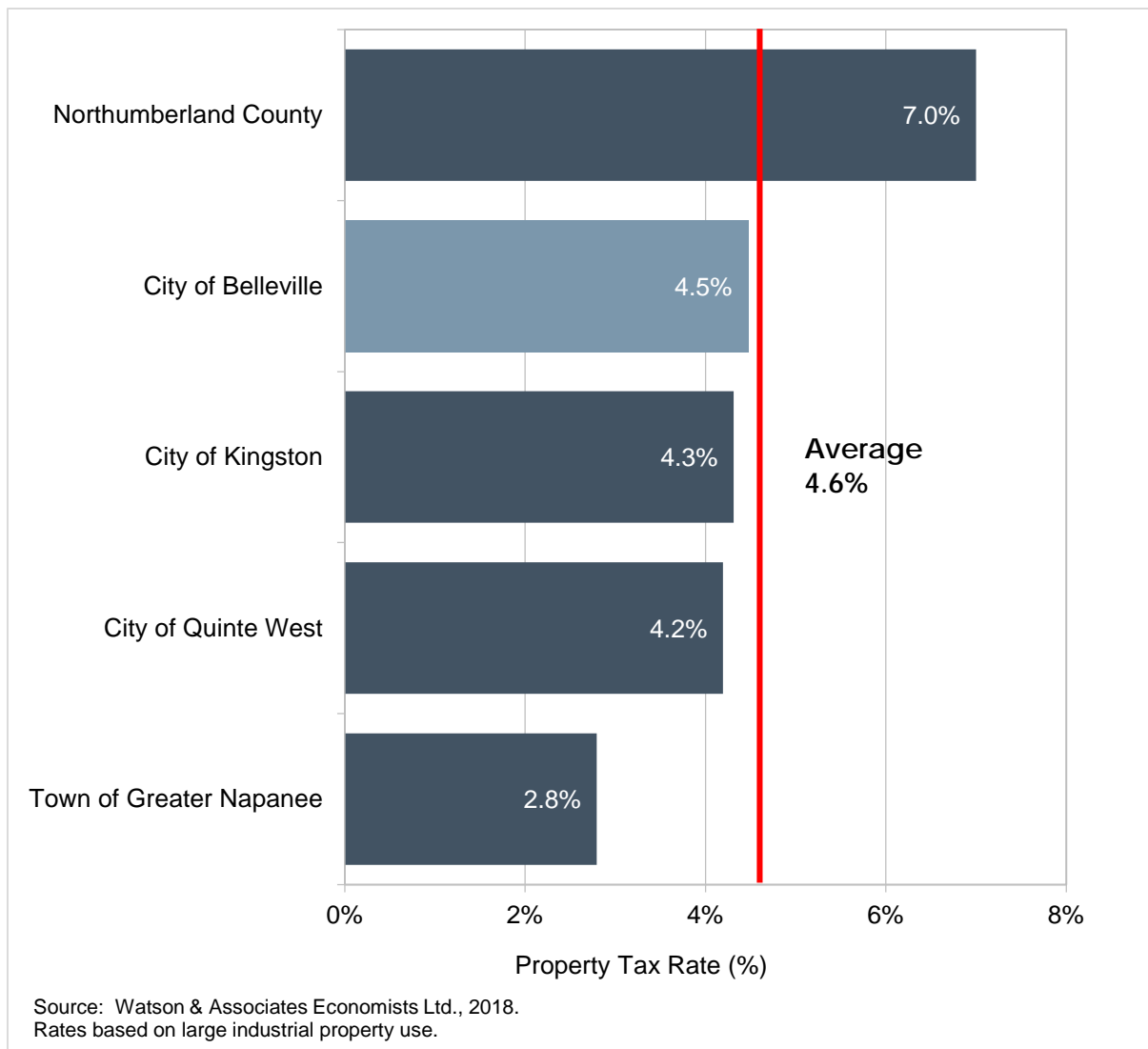
Figure 85
City of Belleville and Surrounding Market Area Municipalities
Average Price of Serviced Vacant Employment Land



Municipal Industrial Tax Rates

Property tax rates represent a consideration for business location decisions, since taxes impact operating profit annually. Figure 86 illustrates industrial tax rates¹ in the municipalities surveyed. As illustrated, Belleville's industrial tax rate is close to the survey average, slightly higher than in Kingston and Quinte West, but notably lower than in Northumberland.

Figure 86
City of Belleville and Surrounding Market Area Municipalities
Industrial Property Tax Rates

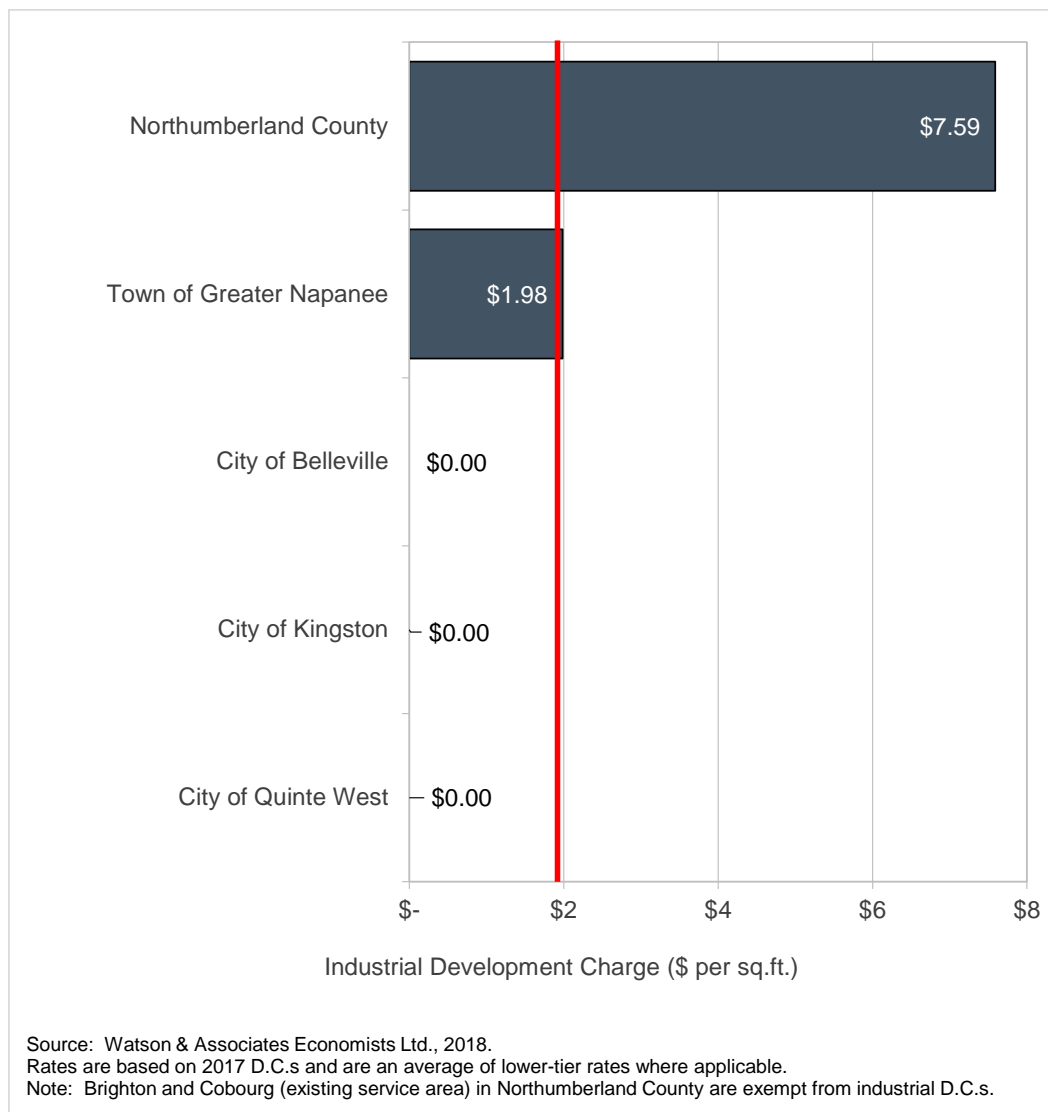


¹ Reflects rates for large industrial buildings.

Industrial Development Charge Rates/Impost Fees

D.C.s/impot fees are also a component of total development cost. Figure 87 summarizes the combined industrial D.C. rates and impost fees, where applicable, in the surveyed municipalities. As illustrated, Belleville, as well as Kingston and Quinte West have exempted industrial D.C.s/impot fees for industrial development, which provides a competitive advantage over the other municipalities surveyed. Northumberland has the highest industrial D.C.s/impot fee (average of \$7.59 per sq.ft.), followed by Greater Napanee (\$1.98).

Figure 87
City of Belleville and Surrounding Market Area Municipalities
Industrial Development Charge/Impost Fee



9.4 Employment Land Needs Forecast Approach

The most current provincially accepted approach to forecasting employment land needs was developed to reflect the broader types of employment in Employment Areas.¹ In 1995, as part of a *Planning Act* review, the Province published a document entitled, “Projection Methodology Guideline: A Guide to Projecting Population, Housing Need, Employment and Related Land Requirements,” to be used in forecasting population and employment for planning purposes.

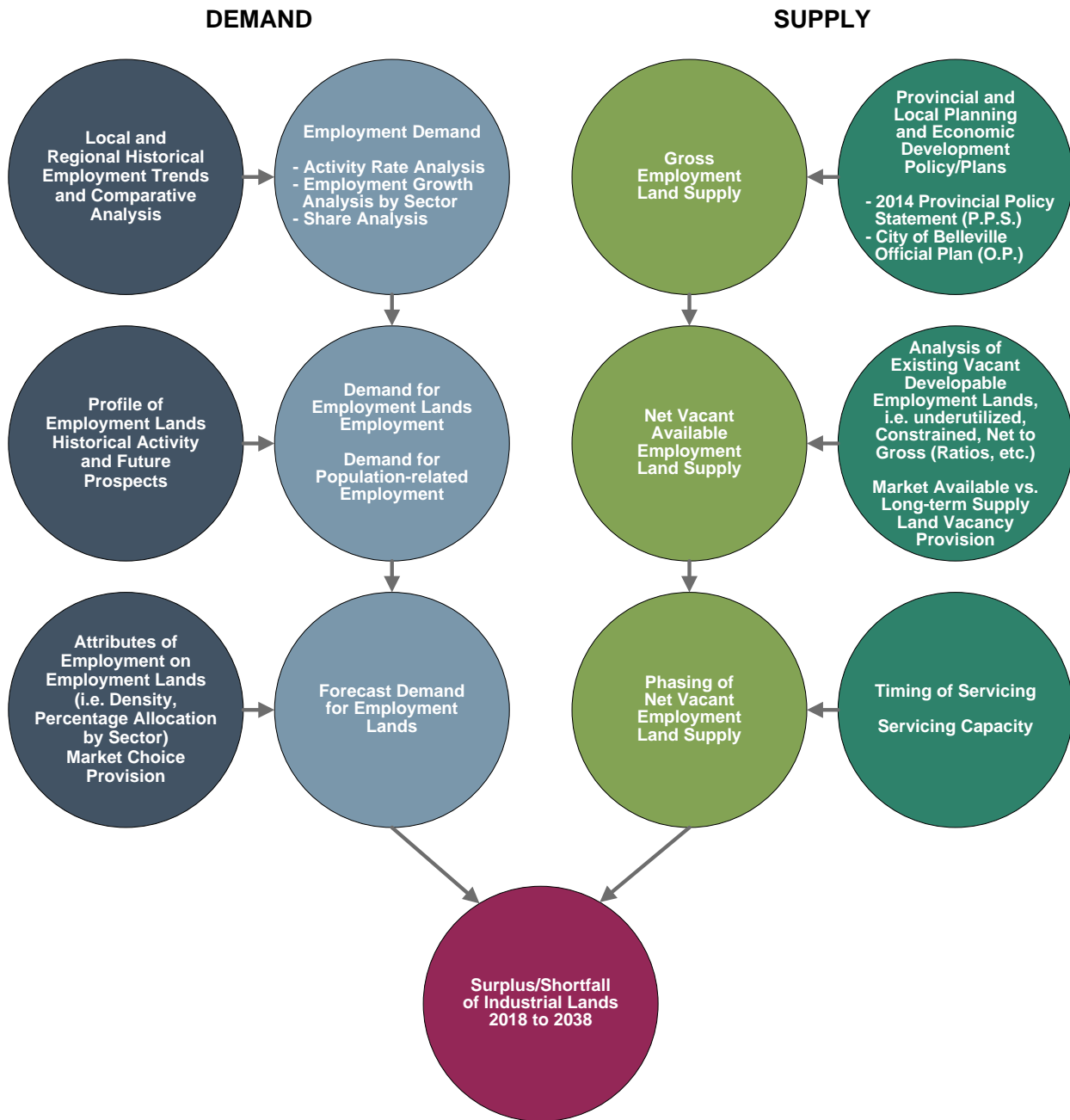
Building on the long-term employment forecast presented in Chapter 6, anticipated employment land need requirements are then identified based on consideration of the following:

- Estimating the share of employment growth on employment lands by major sector (industrial, commercial, institutional);
- Existing and forecast density assumptions (i.e. employees/net hectare or acre) for employment on employment lands;
- Historical and forecast employment land absorption by employment type (i.e. general vs. prestige and sector (i.e. manufacturing, warehousing and distribution, office commercial, etc.)); and
- The amount of long-term net employment lands currently designated for employment uses but currently not developed (vacant) within the City of Belleville.

Figure 88 graphically illustrates this approach.

¹ Excludes Ontario municipalities located within the Greater Golden Horseshoe (G.G.H.).

Figure 88
City of Belleville
Schematic Approach to Forecasting Long-Term Need for Employment Lands



9.5 Forecast Employment Growth on Employment Lands

The forecast demand for employment land is ultimately driven by the forecast growth of employment on employment lands. In accordance with 2014 P.P.S. requirements, a 20-year employment forecast in five-year increments over the 2018 to 2038 period was prepared based on the 2016 to 2041 employment forecast presented in section 6.8.

In generating employment land area requirements for the City of Belleville, the following tasks have been undertaken:

1. Remove Work at Home and No Fixed Place of Work Employment

As a first step, all estimated work at home and N.F.P.O.W. employment have been excluded from the employment land needs analysis, as these employees do not require land in the City's employment areas.

2. Determine the Amount of Employment by Sector to be Accommodated on Employment Lands

As previously identified, current definitions of employment lands have broadened. Employment lands continue to be a focus for industrial uses, but also include office-based commercial employment, employment-supportive uses and to a more limited extent, institutional uses.

A high-level analysis of existing employment distribution and recent development trends along with a review of permitted uses on employment lands, helped inform the percentage breakdown by major sector on employment lands used for the forecast period (2018 to 2038), as shown in Figure 89. Key observations include:

- 99% of forecast industrial employment growth is anticipated to be accommodated on employment lands. A small share of industrial employment growth (1%) is expected to occur in the rural area;
- 30% of forecast commercial employment is expected to be accommodated on employment lands. This includes a large share of the City's office-based employment growth, as well as employment-supportive uses, with the balance accommodated on other designated lands throughout Belleville; and
- 15% of institutional employment growth is anticipated to be accommodated on employment lands with the balance accommodated on other designated lands throughout Belleville.

Figure 89
City of Belleville
Share of 2018 to 2038 Employment Growth on Employment Lands

Major Employment Sector	Share of Employment on Employment Lands
Industrial	99%
Commercial	30%
Institutional	15%

Source: Watson & Associates Economists Ltd., 2018.

Figure 90 summarizes forecast employment on employment lands over the short-term and long-term forecast periods, based on the assumed allocation of growth on employment lands assigned by major sector, as set out in Figure. As illustrated, over the 2018 to 2038 period, Belleville's employment lands are anticipated to accommodate 41% of the City's total employment growth. Over the 2018 to 2028 and 2018 to 2038 periods, employment growth on employment lands is expected to total 990 and 1,510, respectively.

Figure 90
City of Belleville
Forecast Employment Growth on Employment Lands, 2018 to 2038

Employment Type	City-Wide Employment Growth by Sector				Employment Growth on Employment Lands by Sector				Percentage on Employment Lands (%)
	2018-2023	2018-2028	2018-2033	2018-2038	2018-2023	2018-2028	2018-2033	2018-2038	
Primary	0	0	0	0	0	0	0	0	0%
Work at Home	100	181	205	220	0	0	0	0	0%
Industrial	384	668	853	998	380	661	844	988	99%
Commercial	497	894	1,184	1,425	149	268	355	428	30%
Institutional	217	415	562	629	33	62	84	94	15%
No Fixed Place of Work	140	246	335	405	0	0	0	0	0%
Total	1,338	2,403	3,139	3,678	562	991	1,284	1,510	41%

Source: Watson & Associates Economists Ltd., 2018.

Determine Accommodation of Employment Growth through Intensification

As identified in Figure 91, it is recognized that a portion of forecast employment on employment lands growth will be accommodated through intensification. Over the 2018 to 2038 period, an estimated 20% of employment growth is expected to be accommodated through intensification. It is anticipated that the majority of this intensification will be accommodated through the up-take of current vacant industrial G.F.A., as well as expansion of existing developed properties. To evaluate the ability to meet this target, however, the City should monitor intensification development in Employment Areas on a go-forward basis by tracking the location of building permit activity on employment lands.

Identify Forecast Employment Density on Employment Lands

In the past five years (i.e. 2012 to 2017), employment density of development on employment lands in Belleville has averaged approximately 15 jobs per net ha (6 jobs per net acre). Structural changes in the economy are modifying the character of economic activities on employment lands and impacting employment density. Recent trends include:

- Increasing demand for warehousing/logistics and transportation uses for the growing Goods Movement sector which tends to be of lower employment density; and
- Increasing advanced manufacturing which is highly automated and less labour intensive than in the past, lowering employment density in the manufacturing sector.

Continued development of wholesale trade, warehousing and transportation land uses, combined with advanced manufacturing uses with increased automation, will continue to lead to lower employment densities, as exhibited by recent employment land development in the City. As such, it is recommended that the City of Belleville target an employment density on employment lands comparable to recent trends for the purpose of this long-term employment lands needs analysis. A target density of 15 jobs per net ha (6 jobs per net acre) is recommended.

It is recommended that the City monitor future density trends on employment lands.

9.6 Forecast Employment Land Demand

Figure 91 summarizes forecast demand for industrial lands from 2018 to 2038 in five-year increments in accordance with the assumptions made in section 9.5. Key observations include:

- Over the 2018 to 2038 period, 1,510 jobs are forecast to be accommodated on employment lands, of which approximately 300 are expected to be accommodated through intensification;
- Belleville is forecast to absorb an average of 4 net ha (10 net acres) annually of employment land per year over the forecast period;
- Over the 2018 to 2038 period, employment land demand is forecast to total 81 net ha (200 net acres); and
- Average annual absorption rates are forecast to gradually decrease over the forecast period.

Figure 91
City of Belleville
Forecast Employment Land Demand, 2018 to 2038

Growth Period	Employment Growth on Employment Lands			Employment Density (Jobs per net ha)	Total Employment Land Demand (Net ha)	Average Annual Employment Land Demand (Net ha)
	Total Employment on Employment Lands	Intensification on Employment Lands - 10%	Total Employment on Employment Lands Adjusted for Intensification			
2018-2023	562	112	450	15	30	6
2018-2028	991	198	793	15	53	5
2018-2033	1,284	257	1,027	15	68	5
2018-2038	1,510	302	1,208	15	81	4

Source: Watson & Associates Economists Ltd., 2018.

9.7 Employment Land Needs

Figure 92 summarizes forecast employment land needs for Belleville over the 20-year planning horizon. In accordance with the existing supply of developable designated vacant industrial lands, adjusted for the vacancy factor identified in Chapter 5 (i.e. 475 net ha or 1,174 net acres) versus long-term municipal-wide demand, Belleville has a sufficient supply of designated employment lands to meet long-term needs to 2038. As of 2038, a net surplus of 346 net ha (858 net acres) has been identified.

Figure 92
City of Belleville
Employment Land Need (Demand vs. Supply), 2018 to 2038

	Period			
	2018-2023	2018-2028	2018-2033	2018-2038
Net Employment Land Demand	30	53	68	81
Net Employment Land Supply ¹	426	426	426	426
Net Employment Land Surplus/(Shortfall)	396	374	358	346

Source: Watson & Associates Economists Ltd., 2018.

Note: Numbers may not add precisely due to rounding

¹ Adjusted for land vacancy factor.

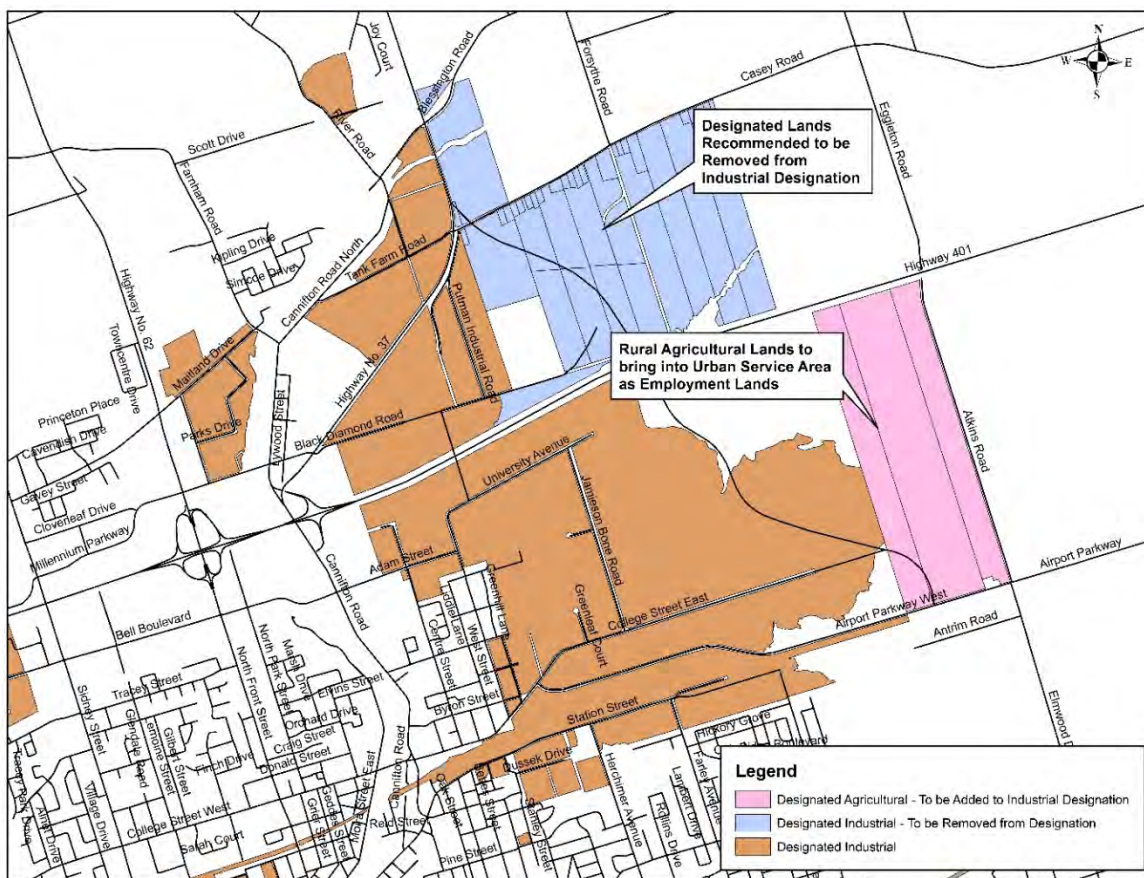
9.8 Potential Employment Land Exchange

One key objective of this study was to address the need to expand the City's Urban Serviced Area to include 166 gross ha (409 gross acres) of agricultural land expropriated in 2009 (located immediately to the east of the North East Industrial Area located between Highway 401 and College Street East) as employment land. These lands, hereafter referred to as the expropriated rural agricultural lands, are illustrated in Figure 93.

As identified in section 9.7, it has been determined that there is no need to designate additional employment land to meet the needs of the City over the next 20 years. In order to strengthen the employment lands base of the North East Industrial Park, however, and provide a broader market choice of municipally-owned vacant employment lands, it is recommended that the expropriated rural agricultural lands be brought into the Urban Serviced Area through a vacant employment land exchange (land swap).

As identified in section 5.3 and illustrated in Figure 49, there are approximately 276 gross ha (682 acres) of vacant employment lands (excluding environmental features) within the Urban Serviced Area located north of Highway 401 and east of Highway 37 that are not considered developable over the forecast period. These lands are included in the employment land supply and corresponding employment land needs analysis, are currently unserviced and not considered serviceable within the forecast period.¹ As such, it is recommended that an urban boundary adjustment be made, whereby these lands are removed from the Urban Serviced Area (i.e. de-designated from an employment land designation to an agricultural designation). In exchange, 166 gross ha/410 gross acres (excluding environmentally protected lands) of the expropriated agricultural lands would be added to the Urban Serviced Area and designated employment land.²

**Figure 93
City of Belleville
Land Exchange and Proposed Land-Use Designation Changes**



¹ As identified in Chapter 5 on a map (Figure 37). Refer to Appendix F for the Water and Wastewater Infrastructure Review.
² Refer to Appendix G for an Analysis of Removal of Prime Agricultural Area.

The addition of 166 gross ha (excluding environmentally protected lands) of expropriated lands to the Urban Serviced Area would complement and strengthen the existing North East Industrial Park and strengthen the City's competitive position in terms of employment lands and economic development potential. It is important to note the land exchange would not exacerbate the City's employment land surplus as the land exchange would reduce the supply of vacant designated employment lands and add additional designated agricultural lands. As summarized in Figure 94, it is recommended the City remove more employment land from its urban serviced area (276 ha/682 acres) than the lands recommended to be brought into the urban serviced area as employment lands (166 ha/410 acres). The land exchange would result in an employment land surplus of approximately 337 gross hectares (832 acres).

**Figure 94
City of Belleville
Employment Land Exchange**

	Land Area, ha	
	Gross	
Supply (A) ¹		554
Demand (B) ²	-	108
i) Employment Land Need: Surplus/(Shortfall) (C= A-B)	=	447
Lands to be Removed, North of 401 Highway and East of Hydro Corridor (D) ³	-	276
Lands to be Added, North East Industrial Area (E)	+	166
ii) Employment Land Need: Surplus/(Shortfall) (F= C - D + E)	=	337

¹Includes all designated industrial lands.

² 81 net hectares.

³ Refer to map for recommended designated area to be removed from industrial designation.

9.9 Employment Lands for Review and Potential Conversion

In association with the City of Belleville, all the City's designated employment lands have been reviewed on a site-by-site basis to determine if potential conversions to non-employment uses are appropriate and justified from a planning and economic perspective. This City-wide review identified several sites to be considered for potential conversion to non-employment uses. All but one of the sites is located in the City of

Belleville O.P. Special Policy Area – the Bayshore Planning Area.¹ The other site is located in the Sidney Street Industrial Area. This exercise was completed through the framework of a Municipal Comprehensive Review (M.C.R.) as directed by provincial policies under the 2014 P.P.S.

In total, six sites that are designated industrial in the O.P. have been selected and assessed for potential conversion from employment to non-employment uses based on a broad range of evaluation criteria. For each proposed site conversion, the recommended land-use designation has been provided. An Official Plan Amendment initiated by the City would redesignate the subject sites.

9.9.1 Employment Land Conversion Sites

As previously mentioned, the City of Belleville's occupied and vacant employment land inventory has been updated as part of this study. As part of this M.C.R. update, the City has identified six potential employment land sites to be reviewed for potential conversion to a non-employment use. These sites are summarized below in Figure 95.

Figure 95
City of Belleville
City of Belleville Employment Lands Reviewed

Employment Area	Site #	Site Name	Site Land Area
Sidney Street Industrial Area	1	Palmer Road/North of Boyce Court ("Nortel Lands" – western portion)	3.2 ha/8.1 acres
Waterfront Industrial Area – Bayshore Planning Area (Special Policy Area)	2	30 Franklin St/South of Dundas Street ("Stephens Adamson Site")	4.3 ha/10.7 acres
	3	1 Willis Street/South of Dundas Street ("Cold Storage Site")	1.1 ha/2.6 acres
	4	231 Dundas Street/North of CN Railway Line ("Bioniche Site")	3.5 ha/8.7 acres
	5	471 Dundas Street/North of CN Railway Line ("Kennametal Site")	5.5 ha/13.6 acres
	6	665 Dundas Street/East of Haig Road	4.5 ha/11.2 acres
Total			22 ha/55 acres

¹ City of Belleville Official Plan (2002), Section 4, Special Policy Areas.

9.9.2 Evaluation

Each site was subject to an evaluation to assess the merits for conversion based on a broad range of evaluation criteria as outlined below. This discussion also includes the conversion test established under subsection 1.3.2.2. of the P.P.S.:

“Planning Authorities may permit conversion of lands within employment areas to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.”

Each potential conversion site was reviewed against the following evaluation criteria to determine its merits for conversion:

- Site is located outside an established or proposed industrial/business park;
- Site is isolated from surrounding designated employment lands;
- Site is surrounded by non-employment land uses on at least three sides;
- Conversion would not create incompatible land uses;
- Conversion of site will not negatively affect employment lands in the area;
- Conversion would be consistent/supportive of City policy planning objectives;
- Conversion doesn't contravene any City policy planning objectives;
- Site offers limited market choice for employment lands development due to size, configuration, physical conditions, other; and
- Site does not offer potential future expansion on existing or neighbouring employment lands.

These evaluation criteria are discussed in a site-by-site analysis below and are summarized in Figure 96.

On a go-forward basis, the enhanced evaluation framework should be used by the City, in conjunction with the City's O.P., in reviewing applications on both vacant and developed industrial lands where an application has been submitted to the City to convert all, or a portion of, an industrial site to a non-employment use.

Figure 96
City of Belleville
Planning and Economic Considerations and Evaluation of Potential Conversion Sites

A	Site is located outside or on the fringe of an Employment Area
B	Site is isolated from surrounding designated employment lands
C	Site is surrounded by non-employment land uses on at least three sides
D	Conversion would not create incompatible land uses
E	Conversion of site will not negatively affect employment lands in the area
F	Conversion would be consistent/supportive of City policy planning objectives
G	Conversion doesn't contravene any City policy planning objectives
H	Site offers limited market choice for employment lands development due to size, configuration, physical conditions, other
I	Site does not offer potential for future expansion by neighbouring employment lands

Employment Area	Site #	Site Name	A	B	C	D	E	F	G	H	I	Recommend for Conversion
Sidney Street Industrial Area	1	Palmer Road/North of Boyce Court ("Nortel Lands" – western portion)	✓	✗	✓	✓	✓	✓	✓	✓	✗	✓
Waterfront Industrial Area - Bayshore Planning Area	2	30 Franklin Street/South of Dundas Street ("Stephens Adamson Site")	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓
	3	1 Willis Street/South of Dundas Street ("Cold Storage Site")	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓
	4	231 Dundas Street/North of CN Railway Line ("Bioniche Site")	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	5	471 Dundas Street/North of CN Railway Line ("Kennametal Site")	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	6	665 Dundas Street/East of Haig Road	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Source: Watson & Associates Economists Ltd.

9.9.3 Potential Sites Reviewed for Employment Conversion

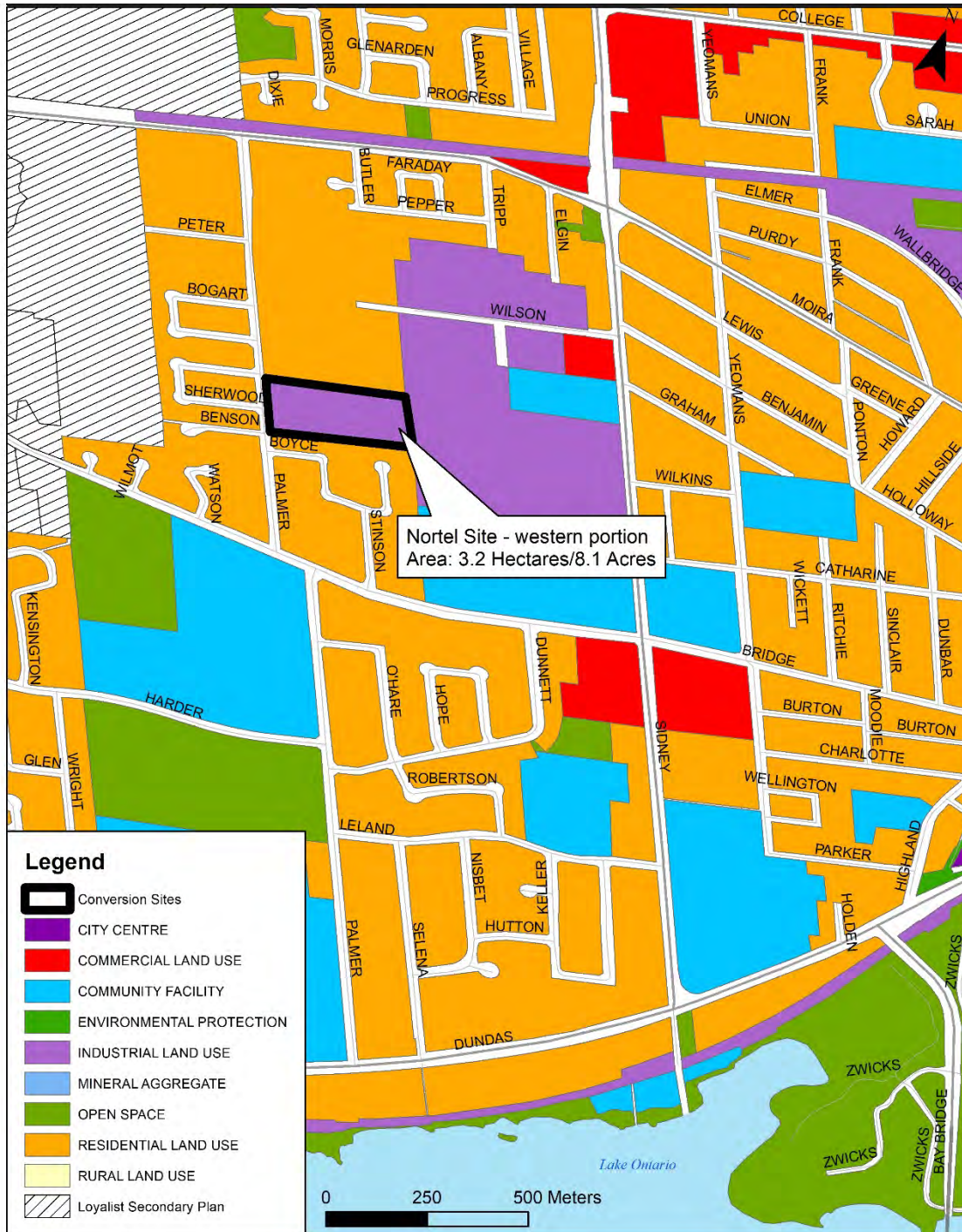
Area 1: Sidney Street Industrial Area

Figure 97 identifies the geographic location of the Palmer Road/North of Boyce Court site within the Sidney Street Industrial Area. The subject lands are surrounded by developed designated residential uses to the south and west, vacant designated residential lands to the north and industrial lands to the east.

In total, the site is 3.2 gross ha (8.1 gross acres) in area. The subject lands are currently underutilized and designated “Industrial” in the City of Belleville O.P. Historically, the lands functioned as an extension to the former Nortel operation (to the east) by providing an alternate entrance to the site via a private roadway connecting Palmer Road to the Nortel Lands. Adjacent industrial uses (“Nortel Lands”) have access to Sidney Street, a major arterial road in the City, while the subject lands have access to a primary residential street, Palmer Road. The subject lands are not connected to the Sidney Street Industrial Area via public internal roadway access.

It is recommended the subject lands should be redesignated from industrial to residential due to the lack of cohesion with the surrounding Sidney Street Industrial Area. Further, the subject lands are in a predominately residential area, reducing the potential for a broader range of industrial uses without negatively impacting the adjacent residential areas.

Figure 97
City of Belleville
Potential Employment Land Conversion Site #1
Sidney Street Industrial Area – Palmer Road/North of Boyce Court



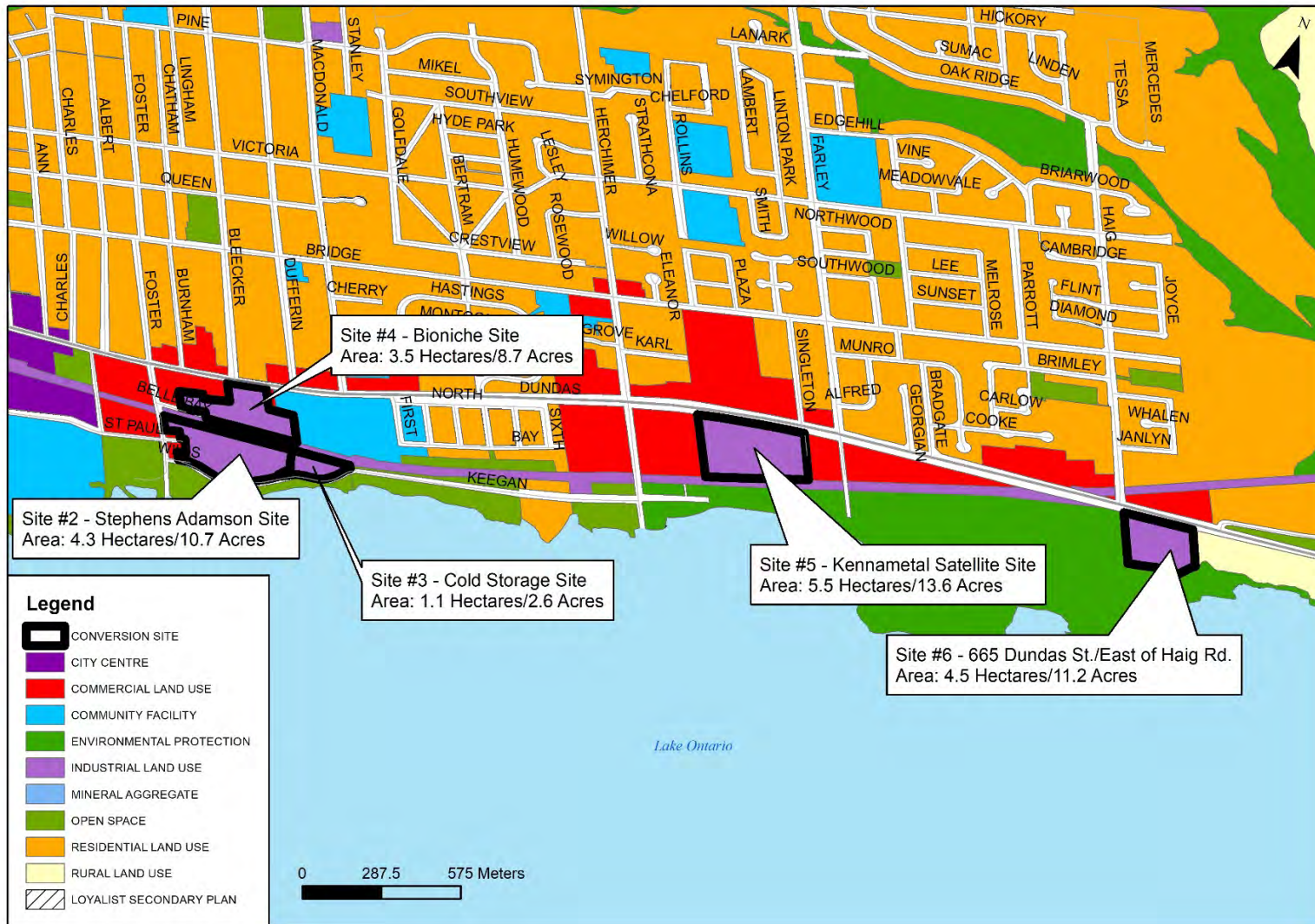
Area 2: Waterfront Industrial Area - Bayshore Planning Area

Figure 98 identifies the geographic location of five sites within the Waterfront Industrial Area. These sites represent all the designated industrial sites within the Waterfront Industrial Area. The Waterfront Industrial Area has had a very long history in the City of Belleville; these lands are situated along Dundas Street, originally the City's primary highway access (Highway 2) prior to the construction of Highway 401. Historically, these lands once accommodated a portion of the City's manufacturing base which over time has moved to the City's northern Employment Areas with access to Highway 401. Comprised of fragmented industrial sites, the Waterfront Industrial Area sites are surrounded by other land uses: residential, commercial, institutional and parkland.

The City's O.P. designates these lands as "industrial" and has identified the Waterfront Industrial Area as part of a special planning area, the Bayshore Planning Area. The Bayshore Planning Area is planned to transition to non-industrial uses benefiting from the market appeal of the City's waterfront. In total, the sites in this area total 18.8 gross ha (46.4 gross acres).

Due to limited market appeal for Employment Area development, it is recommended that the subject lands should be redesignated from industrial to residential with an opportunity for commercial uses. Limited market appeal is largely due to the distance to Highway 401 and the configuration of the Waterfront Industrial Area which is comprised of several small and fragmented industrial sites scattered throughout the southern portion of the City. From a planning and economic development perspective, these lands would provide the opportunity for the City of Belleville to create a vibrant mixed-use waterfront community over the long term.

Figure 98
City of Belleville
Potential Employment Land Conversion Sites #2 to #6
Waterfront Industrial Area – Bayshore Planning Area



9.9 Observations

Belleville is well located geographically along the Highway 401 corridor and is accessible to a range of markets in Central Canada and the north-eastern U.S. The City offers competitive industrial development costs and has a competitive labour force pool with respect to education and working-age population. The City's supply of vacant designated employment lands is, however, lower than in the other surveyed municipalities, which constrains competitiveness from a market choice perspective.

Over the 20-year planning horizon, the City is expected to add a total of approximately 1,510 jobs on employment lands. While a portion of employment growth is expected to be accommodated through intensification, employment land demand is expected to total 81 net ha (200 net acres). To accommodate this employment growth, Belleville is expected to absorb 4 net ha (10 net acres) of employment lands annually, comparable to the historical average.

In accordance with the existing supply of developable vacant employment land, Belleville has a sufficient supply of employment lands to meet long-term needs to 2038. Despite the identified surplus, Belleville has a shortage of municipally owned developable land and it is recommended that the City complete a land exchange to strengthen its competitive position. This would involve de-designating 276 gross ha (excluding environmental features) of employment land located north of Highway 401 and east of Highway 37. In return, a smaller land area (166 gross ha) of expropriated rural agricultural land (located immediately to the east of the North East Industrial Area, located between Highway 401 and College Street East) would be brought into the Urban Serviced Area as employment land.

In association with the City of Belleville, Watson has reviewed all the City's designated employment lands on a site-by-site basis to determine if potential conversions to non-employment uses are appropriate and justified from a planning and economic perspective. In total, six sites have been identified for conversion, totaling 22 ha (55 acres). These sites are located in two mature industrial areas – the Sidney Street Industrial Area and the Waterfront Industrial Area. The industrial sites in the Waterfront Industrial Area are generally isolated and fragmented parcels which are independent of existing or planned Employment Areas within the City. The industrial site in the Sidney Street Industrial Area is not well-connected to the surrounding industrial area and is surrounded by residential uses. Thus, the proposed employment land conversion sites will have little to no impact on established Employment Areas. Given the relatively limited marketability of the subject sites, they will likely remain underutilized over the

long term, which does not support the broader objectives of the 2014 P.P.S. to promote economic development and competitiveness. As such, all six employment land sites reviewed are recommended for conversion to a residential land use.

10. Policy Recommendations

The purpose of this section is to provide O.P. policy direction recommendations that will assist Belleville in effectively managing its supply of residential and non-residential land over the 20-year planning horizon. Policy directions are provided separately for residential, commercial/community facility and employment lands, and are framed around the planning matters discussed earlier in this report.

10.1 Residential Policy Matters

Residential Policy Matters from Section 7	Discussion and Recommended O.P. Policy Direction
Urban/rural housing growth	<p>Discussion:</p> <p>To properly manage growth in accordance with the P.P.S., revised O.P. policies need to incorporate the findings of the Comprehensive Review as its basis for the long-term planning of Belleville. Recent changes to the P.P.S. require the City to include provisions for second units.</p> <p>Recommendation for section 2.2.3 (Growth Pressures):</p> <p>The O.P. should incorporate a residential urban and rural housing growth allocation target over the forecast period. This should identify that approximately 90-95% of City-wide housing growth over the forecast period should occur in the urban area and approximately 5-10% of City-wide housing growth should occur through rural growth.</p> <p>Recommendation for section 2.2.4 (Settlement Patterns):</p> <p>O.P. policy indicating that rural growth should be limited to development on existing vacant lots in rural plans of subdivision and vacant rural lots. (Note: The specific approach to accommodate the demand for 210 rural lots in Belleville will be explored through a separate analysis.)</p>

Residential Policy Matters from Section 7	Discussion and Recommended O.P. Policy Direction
Urban/rural housing growth (cont'd)	<p>Recommendation for section 3.10 (Residential Land Use):</p> <p>O.P. policy indicating that second units¹ are permitted in single-detached, semi-detached, row houses, or ancillary structures, to increase the City's stock of affordable housing.</p>
Residential intensification in the urban area	<p>Discussion:</p> <p>The P.P.S. requires that municipalities set intensification targets for residential and non-residential development.</p> <p>Recommendation for section 2.2.3 (Growth Pressures):</p> <p>The basis of the O.P. should incorporate a residential intensification target of 20% (660 units) over the 2018 to 2038 forecast period.²</p> <p>Recommendation for intensification policies:</p> <p>Existing intensification policies and mapping for the built-up area should be reviewed to ensure they are sufficient for achieving intensification targets for residential and non-residential development.</p>
Intensification challenges such as infrastructure capacity, market demand, policy tools, etc.	<p>Discussion:</p> <p>The P.P.S. requires that municipalities promote opportunities for intensification, in appropriate areas, as a means to support the efficient use of existing infrastructure. Intensification through infill/redevelopment is forecast to represent 20% of total housing construction in Belleville. There are various tools that the municipality can use to identify, plan for, and encourage intensification in Belleville, creating an environment that makes it favourable to develop intensification projects; this could be emphasized for the City Centre where intensification activity is concentrated.</p>

¹ Ministry of Municipal Affairs: Secondary Units (2017). Accessed from: <http://www.mah.gov.on.ca/Page16444.aspx>

² Excludes secondary units.

Residential Policy Matters from Section 7	Discussion and Recommended O.P. Policy Direction
Intensification challenges (cont'd)	<p>Recommendation for Schedule B:</p> <p>O.P. mapping should include a map which delineates the City's built boundary.</p> <p>Recommendation for section 7.1 (Community Improvement Policies):</p> <p>O.P. policy for a Community Improvement Plan to offer financial incentives that will help stimulate development of intensification sites. The built boundary or sub-area(s) could be defined as the C.I.P. area; one sub-area of focus could be the City Centre where intensification is concentrated.</p> <p>Financial Incentives could be used to target the development of affordable housing in all forms, including medium and high density residential development within the City. In addition, consideration should be given to creating incentives through a Housing C.I.P. that would leverage the incentives available through the City's other C.I.P. programs. This could be achieved by creating a consolidated CIP document.</p> <p>Recommendation for section 8.2 (Site Plan Control):</p> <p>O.P. policy for fast-tracking the development of site plan control applications for intensification sites (i.e. giving these sites preferential treatment for processing over greenfield development applications).</p> <p>Recommendation for section 5.2 (Municipal Sanitary Sewer and Water Systems):</p> <p>O.P. policy prioritizing infrastructure upgrades in prime intensification areas where infrastructure is a constraint to facilitate development of intensification sites.</p>

Residential Policy Matters from Section 7	Discussion and Recommended O.P. Policy Direction
<p>Forecast overall greenfield housing surplus of 4,150 units in 2038 but forecast deficit of 270 low-density housing units when the Loyalist Secondary Plan residential supply is excluded</p>	<p>Discussion:</p> <p>There is overall sufficient residential land to service the growth needs of Belleville over the next 20 years. It is important that the O.P. policies recognize this and encourage development to achieve this forecast. Due to the financial constraints with servicing the Central Zone of the Loyalist Secondary Plan area, Belleville will benefit from having policies that offer flexibility for lands to build out where development is marketable and financially viable.</p> <p>Recommendation for section 2.2.4 (Settlement Patterns):</p> <p>O.P. policy indicating that no urban boundary expansion is required to accommodate residential growth to 2038.</p> <p>Recommendation for section 4.4 (Special Policy Area #4 – Loyalist Planning Area):</p> <p>O.P. policy indicating that the costs identified in the City of Belleville 2011 South Loyalist Secondary Plan Area-Specific Development Charge Background Study to extend municipal services into the Central Zone of the Loyalist Secondary Plan Area are significant. Lands which are not cost-effective to development shall be mapped and those lands deferred and other more cost-effective lands may be considered and evaluated during the next five-year O.P. review.</p> <p>Recommendation for section 8.12 (Plans and Plan Review):</p> <p>O.P. policy indicating that any changes to the urban boundary will require a Comprehensive Review as defined by the P.P.S.</p> <p>Recommendation for Zoning By-Law Review:</p> <p>An analysis of residential densities to identify areas in which phasing would be used in order to address the oversupply of higher density housing units and the under supply of low-density housing units. This may require supporting O.P. policy.</p>

Residential Policy Matters from Section 7	Discussion and Recommended O.P. Policy Direction
<p>Phasing-in development in the Loyalist Secondary Plan Area</p>	<p>Discussion:</p> <p>Phasing-in of servicing that facilitates development is important to maintaining the up-take of development land needed to achieve the long-range forecasts in this Comprehensive Review, in particular because there is a portion of the Loyalist Secondary Plan which is more cost-effective to service than the rest of the area.</p> <p>Recommendation for section 4.4.1 (Land Use Policies) / Loyalist Secondary Plan, section 7 (Development Phasing):</p> <p>O.P. policy for the orderly progression of development on the lands within the Loyalist Secondary Plan through consideration of the City's Wastewater Servicing Master Plan to ensure lands are developed in accordance with planned infrastructure investments, and prevent the development of areas that are not immediately serviceable.</p> <p>Recommendation for the Loyalist Secondary Plan, sections 4.1 (Municipal Water System) and 4.2 (Municipal Sanitary Sewer System):</p> <p>Secondary Plan servicing policies prioritizing the servicing of the most financially viable portions of the Loyalist Secondary Plan before 2038 to facilitate its timely buildout.</p>

10.2 Commercial/Community Facility Policy Matters

Commercial/Community Facility Policy Matters from Section 8	Discussion and Recommended O.P. Policy Direction
Overall supply of vacant designated commercial land	<p>Discussion:</p> <p>To properly manage growth in accordance with the P.P.S., revised O.P. policies need to incorporate the findings of the Comprehensive Review as its basis for the long-term planning of Belleville.</p> <p>Recommendation for section 2.2.3 (Growth Pressures):</p> <p>The basis of the O.P. should incorporate a forecast demand of 14 net ha (35 net acres) of designated commercial lands, over the 2018 to 2038 period.¹</p>
Nearly 2.7 million sq.ft. of commercial floor space could be potentially accommodated in the downtown core through intensification	<p>Discussion:</p> <p>Belleville has a strong and vibrant downtown, and intensifying development with additional commercial floor space and additional employees can contribute significantly to the long-term vibrancy of the downtown area, provide a larger base of immediate customers for existing downtown businesses, and synergize with residential intensification in the downtown. It is in the public interest that sufficient market choice in the commercial floor space is realized.</p> <p>Recommendation for section 7.1 (Community Improvement Policies):</p> <p>O.P. policy for financial incentives through a Community Improvement Plan that further encourages intensification of the downtown core.</p> <p>Recommendation for section 2.2.8 (Commerce and Industry):</p> <p>O.P. policy to promote mixed-use development that incorporates commercial land uses in appropriate locations to contribute to the urban fabric of the community and increase access to services; this would benefit from the identification of opportunity areas that may consist of underutilized properties and/or greenfield/developing commercial areas.</p>

¹ A portion of commercial employment to be accommodated through intensification on existing commercial sites and in the downtown.

Commercial/Community Facility Policy Matters from Section 8	Discussion and Recommended O.P. Policy Direction
Overall supply of community facility lands	<p>Discussion:</p> <p>To properly manage growth in accordance with the P.P.S., revised O.P. policies need to incorporate the findings of the Comprehensive Review as its basis for the long-term planning of Belleville.</p> <p>Recommendation for section 2.2.3 (Growth Pressures):</p> <p>The basis of the O.P. should incorporate a community facility forecast of 10 net ha (25 net acres) and approximately 350 new employees.</p>

Commercial/Community Facility Policy Matters from Section 8	Discussion and Recommended O.P. Policy Direction
<p>55% of future institutional employment is expected to be accommodated in the downtown core, as well as on lands designated residential, commercial and industrial</p>	<p>Discussion:</p> <p>The large amount of future institutional employment that could contribute to the take-up of downtown intensification, commercial and industrial land is significant and should be encouraged to help facilitate absorption in these land-use designations. It is expected that institutional uses accommodated on residential lands are appropriate to minimize land-use conflicts. Additionally, grouping health, social, cultural, recreational and other resources together in a community hub can serve as a central access point for residents and reduce the amount of land required to meet institutional needs in both urban and rural areas.¹ The policies of the Belleville O.P. should encourage institutional uses to develop in this way.</p> <p>Recommendation for section 3.10.3 (Non-Residential Policies):</p> <p>O.P. policies directing that residential-type institutional uses should be developed on lands designated residential and non-residential-type institutional uses should be developed on lands designated commercial and industrial.</p> <p>Recommendation for section 2.2.9 (Social Needs):</p> <p>O.P. policies directing community facility growth to areas where new development may create a community hub to make better use of public spaces and improve access to services.</p>

¹ Ministry of Infrastructure. Community Hubs (2017). Accessed from: <https://www.ontario.ca/page/community-hubs#section-0>

Commercial/Community Facility Policy Matters from Section 8	Discussion and Recommended O.P. Policy Direction
<p>Forecast commercial land surplus of 220 ha in 2038</p> <p>Forecast community facility lands surplus of 22 ha (54 acres) in 2038</p>	<p>Discussion:</p> <p>There is sufficient supply of commercial and community facility land to service the growth needs of Belleville over the next 20 years. It is important that the O.P. policies recognize this and encourages development to achieve this forecast.</p> <p>Recommendation for section 2.2.4 (Settlement Patterns):</p> <p>O.P. policies recognizing the surplus of commercial lands and discouraging the designation of new commercial lands to help focus development of the existing supply.</p>

10.3 Employment Lands Policy Matters

Employment Lands Policy Matters from Section 9	Discussion and Recommended O.P. Policy Direction
Overall supply of vacant employment lands	<p>Discussion:</p> <p>To properly manage growth in accordance with the P.P.S., revised O.P. policies need to incorporate the findings of the M.C.R. as its basis for the long-term planning of Belleville. Additionally, employees can benefit from the incorporation of appropriate commercial amenities to Employment Areas. The addition of commercial amenities to employment lands requires careful consideration to ensure that the availability of employment lands is preserved for future needs.¹</p> <p>Recommendation for section 2.2.3 (Growth Pressures):</p> <p>The basis of the O.P. should incorporate an employment lands forecast of 1,510 new jobs on employment lands, representing a land demand of approximately 80 net ha (197 net acres) of employment lands.²</p> <p>Recommendation for Section 7.1 (Community Improvement Policies):</p> <p>O.P. policy for an Industrial Lands Community Improvement Plan to offer financial incentives that will help stimulate new development and business expansion on employment lands.</p> <p>Recommendation for section 2.2.8 (Commerce and Industry):</p> <p>O.P. policy recognizing that where it is proposed that Employment Lands be converted for non-employment uses, they must be evaluated in accordance with section 1.3.2.2. of the P.P.S., in addition to the evaluation criteria provided 9.9.2 of this M.C.R.</p>

¹ For further discussion about amenity areas supporting employment land uses, refer to the discussion about “complementary uses” in the City of Kingston’s Employment Land Strategy Review at: <https://www.cityofkingston.ca/business/planning-and-development/planning-studies/land-review>.

² A portion of employment lands employment to be accommodated through intensification.

Employment Lands Policy Matters from Section 9	Discussion and Recommended O.P. Policy Direction
Overall supply of vacant employment lands (cont'd)	<p>Recommendation for section 2.2.8 (Commerce and Industry):</p> <p>O.P. policy to recognize the limited scale and type of commercial development that is appropriate for Employment Areas.</p> <p>Recommendation for Section 4.1 (Special Policy Area #1 – Bayshore Planning Area</p> <p>To provide for transition of this waterfront area and help ensure that the fragmented industrial uses in this area are not misinterpreted as an employment area, with respected to the P.P.S., O.P. policy should create a new designation for the Bayshore area as a mixed-use waterfront.</p> <p>Recommendation for O.P. amendment:</p> <p>It is recommended that that City bring forward an amendment to re-designate the lands identified in section 9.9 of this report to accommodate land uses where the employment lands are not favourably situated for future use as employment lands.</p>

Employment Lands Policy Matters from Section 9	Discussion and Recommended O.P. Policy Direction
<p>Future average densities on employment land in Belleville may be lower than existing densities currently being achieved</p>	<p>Discussion:</p> <p>It is beneficial to recognize that the planning basis for Belleville incorporates a lower density of employment per hectare than what currently exists in the municipality. Setting an employment density target will assist with long-range planning and monitoring of employment land. The target should be treated as a minimum to be achieved municipal-wide on vacant employment lands to allow for site-specific fluctuations in employment density.</p> <p>Recommendation for sections 2.2.3 (Growth Pressures) or 3.12 (Industrial Land Use):</p> <p>O.P. policies establishing an average target density of 15 jobs per net hectare on new (i.e. greenfield) employment lands.</p>

Employment Lands Policy Matters from Section 9	Discussion and Recommended O.P. Policy Direction
<p>Forecast employment lands surplus of 346 net ha (854 net acres) in 2038</p> <p>AND</p> <p>A significant share (276 gross ha (682 gross acres) of the City's designated employment lands are not considered economically viable over the forecast period. The City also has agricultural lands located immediately east of the North East Industrial Area which it would like to designate as employment land but cannot be justified from an employment land needs perspective.</p>	<p>Discussion:</p> <p>Overall, it may appear that the City has sufficient supply of employment land to service the growth needs of Belleville into the future. However, a municipality having existing designated lands which are difficult to service – and therefore unlikely to support the absorption forecast for Belleville – is not as appropriate as having lands which are serviceable and can be built out. In order to ensure that there is an alignment in the amount of land designated and forecast, it is recommended that, in this case, employment lands north of Highway 401 (276 gross ha/682 gross acres) be de-designated to agricultural status. In exchange, 166 gross ha/410 gross acres of land from the agricultural lands immediately east of the North East Industrial Area would be designated employment land.</p> <p>Recommendation for Schedule B:</p> <p>The employment lands north of Highway 401 and east of Highway 37, totaling 276 gross hectares, would be removed from the Urban Serviced Area and re-designated from industrial land use to an agricultural land-use designation. The City's Urban Serviced Area would be expanded to include 166 gross hectares of the agricultural lands and these subject lands would be designated industrial land use.¹</p> <p>Recommendation for section 5.2 (Municipal Sanitary Sewer and Water Systems):</p> <p>Phasing policies will address the necessary extension of services to accommodate future development in the North East Industrial Area to ensure the orderly provision of services and discourage/avoid the development of areas that are not immediately serviceable.²</p>

¹ Refer to Appendix G for an Analysis of the Removal of Prime Agricultural Area.

² Refer to Appendix F for Water and Wasterwater Infrastructure Review.

Appendix A – Growth Projections Approach/Methodology

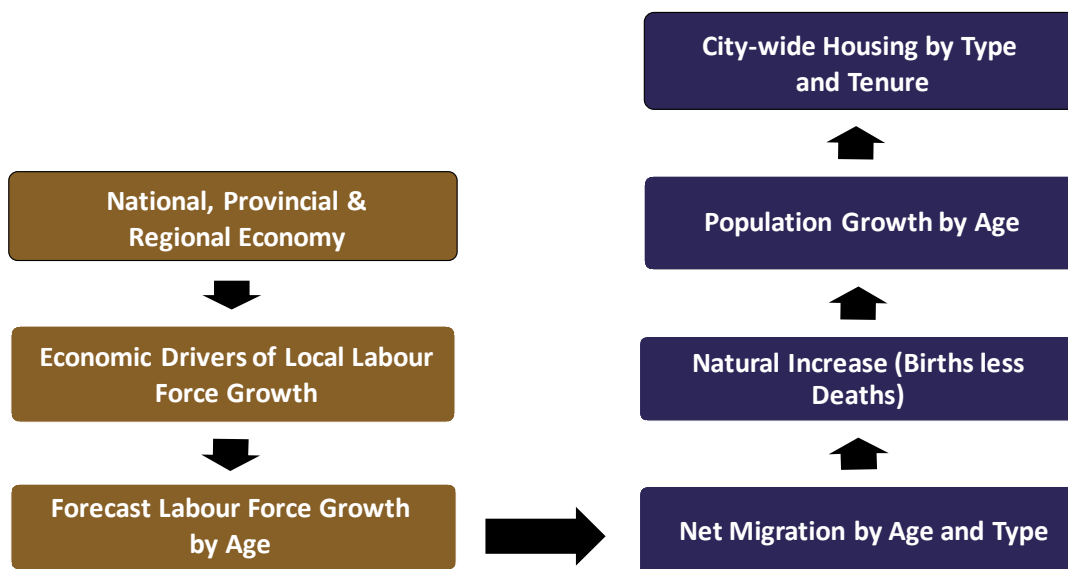
Approach and Methodology

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

A.1 Economic Base Model

Local/regional economic activities can be divided into two categories: those that are “export-based,” and those that are “community-based.” The export-based sector is comprised of industries (i.e. economic clusters) which produce goods that reach markets outside the community (e.g. agriculture and primary resources, manufacturing, research and development). Export-based industries also provide services to temporary and seasonal residents of the municipality (hotels, restaurants, tourism-related sectors, colleges and universities) or to businesses outside the municipality (specialized financial, professional, scientific and technical services). Community-based industries produce services that primarily meet the needs of the residents in the City (retail, medical, primary and secondary education, and personal and government services). Ultimately, future population and housing growth within the City of Belleville has been determined in large measure by the competitiveness of the export-based economy within the City and the surrounding market area. In developing the long-term labour force and population forecast for the City of Belleville, a review of key regional and local economic growth drivers was also considered. The approach is illustrated schematically in Figure A-1.

**Figure A-1
Population and Household Projection Model**



A.2 Cohort-Survival Population and Household Forecast Methodology

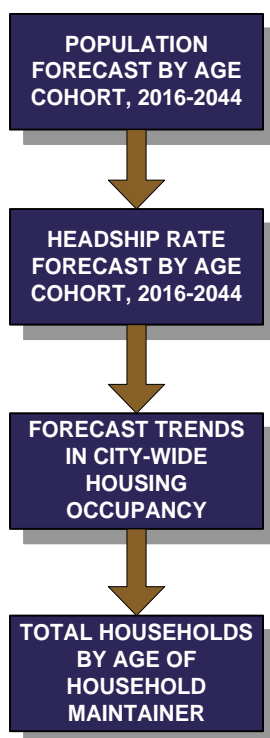
The cohort-survival population forecast methodology uses, as its base, population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this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

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

A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e. cohort). Average headship rates do not tend to vary significantly over time by major age group; however, the number of maintainers per household varies by population age group. For example, the ratio of household maintainers per total housing occupants is higher on average for households occupied by older cohorts (i.e. 55+ years of age) as opposed to households occupied by adults 29 to 54 years of age. This is important because, as the City's population ages, the ratio of household maintainers is anticipated to increase. The average headship

rate represents the inverse of the average number of persons per unit (P.P.U.). As such, as the City's population ages over time, the average P.P.U. is forecast to steadily decline as the ratio of household maintainers per total housing occupants increases. Figure A-2 summarizes the cohort-survival forecast methodology, which is a provincially accepted approach to projecting population and corresponding total household formation.¹

**Figure A-2
Cohort-Survival Population and Household Forecast Methodology**



As a requirement of the development charge calculation, the population forecast has been allocated between existing and new households. This forecasting approach has been developed in accordance with the Provincial Projection Methodology Guidelines and industry best practices.² This approach focuses on the rate of historical housing construction in the City of Belleville and surrounding area, adjusted to incorporate supply and demand factors by geographic area, such as servicing constraints, housing units in the development process, as well as historical housing demand. Population is then forecast by developing assumptions on average household size by unit type, taking

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

² Ibid.

into consideration the higher average occupancy of new housing units and the decline in P.P.U. over time within existing households.

A.3 Forecast Households by Structure Type

Forecast households have been categorized by the following structure types:

- Low density (singles/semi-detached);
- Medium density (townhouses); and
- High density (apartments).

Forecast housing growth by structure type has been developed based on the following supply and demand factors:

Supply Factors

- Supply of potential future housing stock in the development process by housing type and approval status;
- Lag-time between housing starts and completions;
- Housing intensification opportunities;
- Current inventory of net vacant designated urban “greenfield” lands not currently in the development approvals process; and
- Provincial and local planning policy.

Demand Factors

- Historical housing activity based on building permit activity/housing completions;
- Propensity trends by structure type for the City of Belleville;
- Commuting trends and access to surrounding employment markets;
- Market demand for housing intensification;
- Appeal to families, empty-nesters and seniors; and

Major infrastructure improvements and expansions.

A.4 Employment Forecast

The long-term employment growth potential for the City of Belleville has been developed from the labour force growth forecast discussed in section A.1, which considers both the rate and age structure of forecast labour force growth over the 2016 to 2041 planning horizon. A long-term employment growth forecast by major employment sector/ category (i.e. primary, industrial, commercial, institutional, work at

home and no fixed place of work (N.F.P.O.W.)) was then established using the employment “activity rate” method.¹

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

Industrial and office commercial employment (export-based employment), on the other hand, is not closely linked to population growth and tends to be more influenced by broader market conditions (i.e. economic competitiveness, transportation access, access to labour, and distance to employment markets), as well as local site characteristics, such as servicing capacity, highway access and exposure, site size/ configuration, physical conditions and site location within existing and future employment areas throughout the City and the surrounding market area. As such, industrial employment (employment lands employment) is not anticipated to increase in direct proportion to population growth and has been based on a review of the following:

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

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

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

designated employment lands within the City of Belleville and the surrounding market area;

- Recent land sales of municipally-owned vs. privately-owned industrial lands within the City of Belleville and the surrounding market area; and

Recent trends in industrial land prices and overall cost competitiveness on employment lands.

Appendix B – City of Belleville Housing Headship Rates

Figure B-1
City of Belleville
Historical Headship Rates¹, 1991-2016

Year	PPU	Total	Under 25	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75+ years
1991	3.029	0.33010	0.05965	0.40110	0.43209	0.43683	0.48191	0.97435	-
1996	3.024	0.33070	0.05874	0.41395	0.43427	0.42883	0.45105	0.53720	0.57859
2001	2.473	0.40438	0.06601	0.46545	0.54517	0.54999	0.57997	0.64214	0.64345
2006	2.473	0.40437	0.06456	0.43403	0.54971	0.56417	0.56323	0.63701	0.61098
2011	2.407	0.41544	0.06244	0.42891	0.52438	0.57764	0.59392	0.64377	0.60475
2016	2.389	0.41856	0.05279	0.44427	0.51843	0.57847	0.59688	0.60043	0.61492

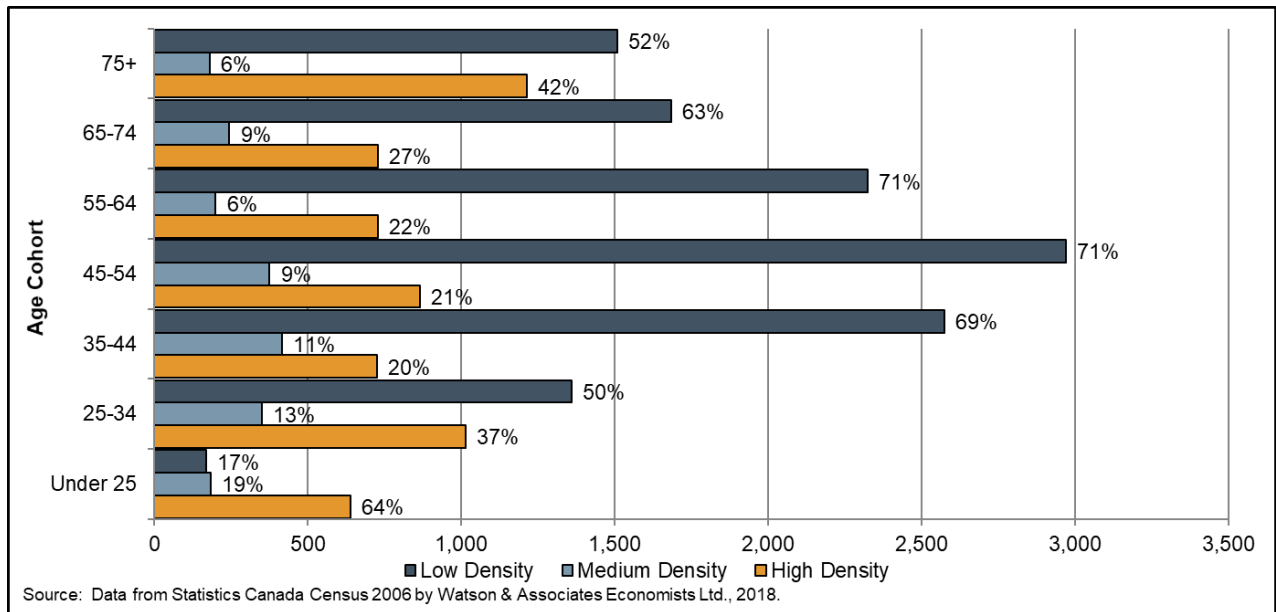
Population based on Census adjusted for Census undercount.

Source: Statistics Canada Census Population, 1991-2016.

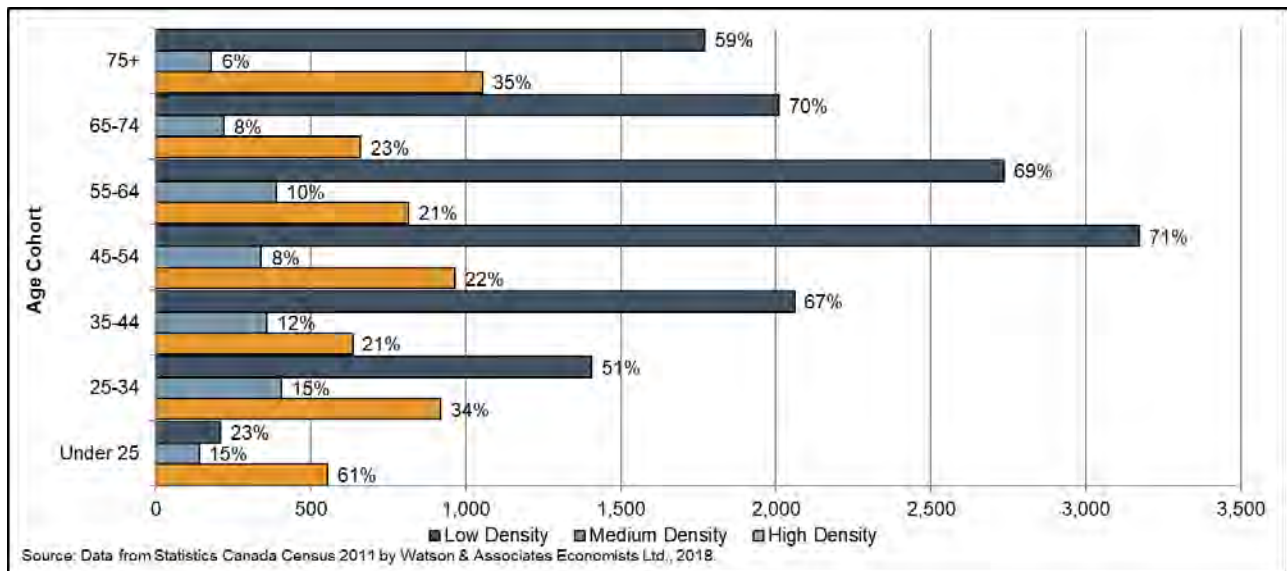
¹ A headship rate is defined as the number of primary household maintainers or heads of households by major population age group (i.e. cohort).

**Appendix C – City of Belleville Housing
Propensity by Household Maintainer,
Structure Type and Age Group, 2006, 2011
and 2016**

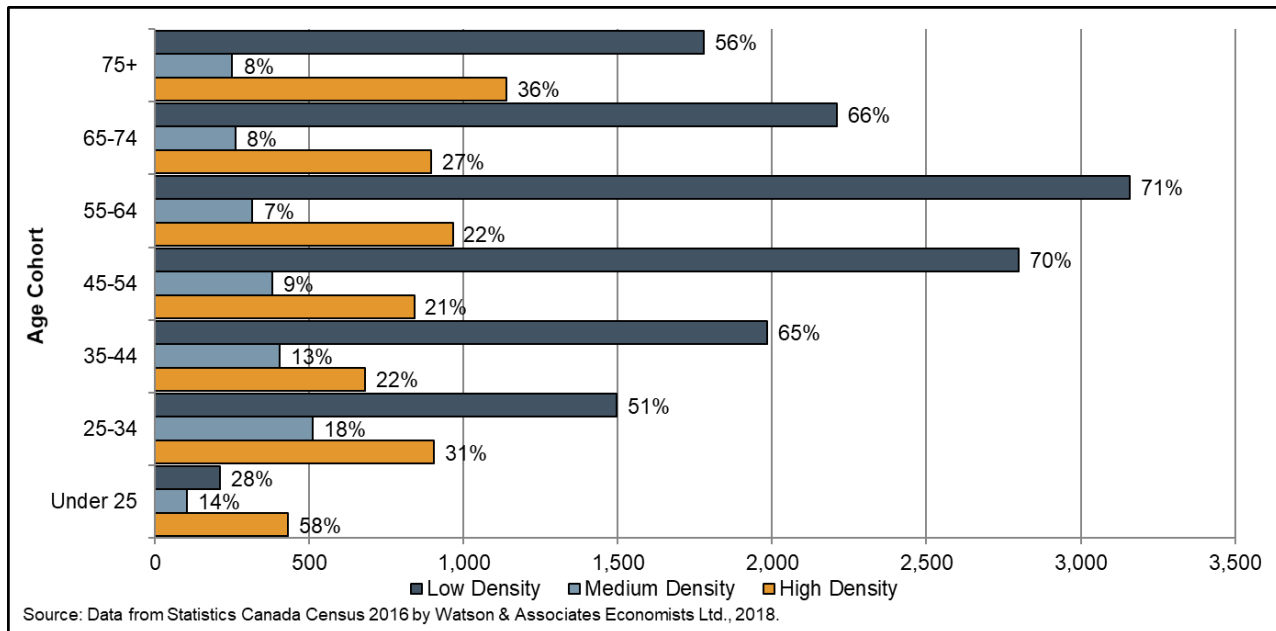
**Figure C-1
City of Belleville
2006 Census for City of Belleville**



**Figure C-2
City of Belleville
2011 Census for City of Belleville**



**Figure C-3
City of Belleville
2016 Census for City of Belleville**



**Figure C-4
City of Belleville
2016 Housing Preferences by Type and Age Group**

Age Cohort	Low Density ¹		Medium Density ²		High Density ³		Total
Under 25	210	28%	105	14%	430	58%	745
25-34	1,495	51%	510	18%	905	31%	2,910
35-44	1,985	65%	405	13%	680	22%	3,070
45-54	2,800	70%	380	9%	840	21%	4,020
55-64	3,160	71%	315	7%	965	22%	4,440
65-74	2,210	66%	260	8%	895	27%	3,365
75+	1,780	56%	250	8%	1,140	36%	3,170
Total Households	13,625	63%	2,230	10%	5,865	27%	21,735

¹ Represents Single and Semi-Detached units

² Represents Townhomes and apartments in duplexes

³ Represents Apartments 5+ Storeys

Figure C-4
City of Belleville
Estimated 2041 Unit Mix Based on 2016 Housing Preference by Structure Type
and Age Group

Age Cohort	Low Density ¹		Medium Density ²		High Density ³		Total
Under 25	200	28%	100	14%	410	58%	710
25-34	1,613	51%	550	18%	977	31%	3,141
35-44	2,186	65%	446	13%	749	22%	3,381
45-54	2,557	70%	347	9%	767	21%	3,671
55-64	2,766	71%	276	7%	845	22%	3,886
65-74	2,499	66%	294	8%	1,012	27%	3,806
75+	4,527	56%	636	8%	2,899	36%	8,062
Total Households	16,348	61%	2,649	10%	7,658	29%	26,655

¹ Represents Single and Semi-Detached units

² Represents Townhouses and apartments in duplexes

³ Represents Apartments 5+ Storeys

Appendix D – City of Belleville Population Forecast

Figure D-1
City of Belleville
Population by Selected Age Cohort, 1996 to 2041

City of Belleville Population (Including Census undercount) ¹

Cohort	1996	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-19	12,133	11,580	11,724	11,148	10,870	11,068	10,917	10,592	10,361	10,193
20-34	10,112	9,489	9,967	9,792	9,981	9,781	9,984	10,169	10,186	9,708
35-44	7,196	7,328	6,767	5,845	5,941	6,217	6,212	6,269	6,349	6,535
45-54	5,620	6,491	7,462	7,747	6,958	6,131	6,213	6,352	6,312	6,339
55-74	8,618	8,641	9,963	11,204	13,043	14,739	14,627	14,155	13,402	12,634
75+	3,811	4,235	4,763	4,969	5,147	6,278	7,910	9,561	11,362	12,895
Total	47,490	47,760	50,650	50,710	51,940	54,210	55,860	57,100	57,970	58,300

Percentage of Population

Cohort	1996	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-19	25.5%	24.2%	23.1%	22.0%	20.9%	20.4%	19.5%	18.5%	17.9%	17.5%
20-34	21.3%	19.9%	19.7%	19.3%	19.2%	18.0%	17.9%	17.8%	17.6%	16.7%
35-44	15.2%	15.3%	13.4%	11.5%	11.4%	11.5%	11.1%	11.0%	11.0%	11.2%
45-54	11.8%	13.6%	14.7%	15.3%	13.4%	11.3%	11.1%	11.1%	10.9%	10.9%
55-74	18.1%	18.1%	19.7%	22.1%	25.1%	27.2%	26.2%	24.8%	23.1%	21.7%
75+	8.0%	8.9%	9.4%	9.8%	9.9%	11.6%	14.2%	16.7%	19.6%	22.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Data from Statistics Canada, Demography Division, 1996-2016. Forecast is an estimate by Watson & Associates Economists Ltd., 2018.

¹ Net population undercount estimated at approximately 2.5%.

Note: Figures may not add precisely due to rounding.

Figure D-2 City of Belleville Net Migration by Age Cohort, 1991-2041

1996-2001

2001-2006

2006-2011

2011-2016

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	(19)	(53)	(72)	-34.6%
1-3 Years	(60)	(56)	(115)	-55.2%
4-8 Years	(54)	(62)	(116)	-55.8%
9-13 Years	(94)	(23)	(117)	-56.1%
14-18 Years	103	179	282	135.5%
19-24 Years	196	218	413	198.3%
25-29 Years	(128)	(139)	(267)	-128.2%
30-34 Years	(121)	(129)	(250)	-120.0%
35-39 Years	(61)	(17)	(79)	-37.8%
40-44 Years	18	8	26	12.7%
45-49 Years	(16)	48	32	15.1%
50-54 Years	(39)	3	(35)	-16.9%
55-59 Years	33	38	71	34.3%
60-64 Years	50	16	66	31.9%
65-69 Years	17	63	80	38.2%
70-74 Years	84	79	163	78.4%
75-79 Years	51	23	74	35.6%
80-84 Years	19	4	23	11.3%
85-89 Years	15	(4)	10	4.9%
90+	(6)	23	17	8.3%
Total	(10)	219	208	100.0%

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	(7)	(22)	(29)	-0.9%
1-3 Years	(46)	(1)	(47)	-1.4%
4-8 Years	10	9	20	0.6%
9-13 Years	75	58	133	4.1%
14-18 Years	301	234	535	16.4%
19-24 Years	227	329	557	17.1%
25-29 Years	(156)	(71)	(227)	-7.0%
30-34 Years	(70)	(50)	(120)	-3.7%
35-39 Years	2	118	121	3.7%
40-44 Years	151	164	315	9.7%
45-49 Years	72	91	163	5.0%
50-54 Years	131	114	244	7.5%
55-59 Years	137	126	263	8.1%
60-64 Years	110	112	222	6.8%
65-69 Years	106	173	279	8.6%
70-74 Years	116	100	217	6.6%
75-79 Years	129	99	228	7.0%
80-84 Years	75	120	195	6.0%
85-89 Years	26	57	83	2.5%
90+	39	72	111	3.4%
Total	1,430	1,829	3,259	100.0%

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	8	35	42	5.0%
1-3 Years	28	7	34	4.0%
4-8 Years	(54)	(125)	(178)	-21.2%
9-13 Years	(7)	(23)	(30)	-3.6%
14-18 Years	113	159	272	32.3%
19-24 Years	(91)	102	10	1.2%
25-29 Years	(131)	(269)	(400)	-47.6%
30-34 Years	(146)	(78)	(224)	-26.7%
35-39 Years	(49)	(40)	(89)	-10.6%
40-44 Years	54	39	93	11.0%
45-49 Years	42	64	106	12.6%
50-54 Years	49	37	86	10.2%
55-59 Years	10	23	33	3.9%
60-64 Years	20	74	94	11.2%
65-69 Years	91	78	169	20.1%
70-74 Years	108	47	155	18.4%
75-79 Years	95	90	186	22.1%
80-84 Years	93	78	171	20.3%
85-89 Years	62	87	149	17.7%
90+	56	107	164	19.5%
Total	351	490	841	100.0%

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	74	5	79	6.8%
1-3 Years	62	24	86	7.4%
4-8 Years	60	(66)	(6)	-0.5%
9-13 Years	121	(6)	115	9.9%
14-18 Years	164	75	238	20.5%
19-24 Years	146	2	148	12.8%
25-29 Years	27	(93)	(65)	-5.6%
30-34 Years	(32)	(38)	(69)	-6.0%
35-39 Years	14	(62)	(48)	-4.1%
40-44 Years	96	(6)	90	7.8%
45-49 Years	35	8	43	3.7%
50-54 Years	109	12	121	10.4%
55-59 Years	133	25	158	13.6%
60-64 Years	113	26	139	12.0%
65-69 Years	123	52	175	15.1%
70-74 Years	43	30	73	6.3%
75-79 Years	65	4	69	5.9%
80-84 Years	64	(23)	41	3.5%
85-89 Years	0	(35)	(35)	-3.0%
90+	1	(194)	(193)	-16.6%
Total	1,421	(260)	1,161	100.0%

Source: Derived from Statistics Canada, Demography Division

**Figure D-2
Continued**

2016-2021

2021-2026

2026-2031

2031-2036

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	2	3	5	0.3%
1-3 Years	(6)	(6)	(12)	-0.6%
4-8 Years	(12)	(27)	(39)	-1.9%
9-13 Years	8	19	28	1.4%
14-18 Years	366	366	733	36.6%
19-24 Years	187	281	468	23.4%
25-29 Years	(199)	(199)	(398)	-19.9%
30-34 Years	(55)	(55)	(110)	-5.5%
35-39 Years	(27)	(12)	(39)	-2.0%
40-44 Years	90	90	181	9.0%
45-49 Years	28	66	95	4.7%
50-54 Years	57	86	144	7.2%
55-59 Years	91	91	182	9.1%
60-64 Years	86	58	144	7.2%
65-69 Years	78	116	194	9.7%
70-74 Years	84	84	168	8.4%
75-79 Years	92	62	154	7.7%
80-84 Years	24	36	59	3.0%
85-89 Years	11	17	29	1.4%
90+	4	10	14	0.7%
Total	912	1,088	2,000	100.0%

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	1	1	2	0.2%
1-3 Years	(3)	(3)	(5)	-0.4%
4-8 Years	(11)	(25)	(35)	-2.4%
9-13 Years	5	12	17	1.1%
14-18 Years	334	334	668	44.5%
19-24 Years	114	170	284	18.9%
25-29 Years	(101)	(101)	(201)	-13.4%
30-34 Years	(33)	(33)	(67)	-4.5%
35-39 Years	(14)	(6)	(20)	-1.3%
40-44 Years	44	44	88	5.9%
45-49 Years	17	40	58	3.8%
50-54 Years	28	42	70	4.7%
55-59 Years	64	64	128	8.5%
60-64 Years	63	42	105	7.0%
65-69 Years	57	85	141	9.4%
70-74 Years	56	56	112	7.5%
75-79 Years	56	37	93	6.2%
80-84 Years	14	22	36	2.4%
85-89 Years	7	10	17	1.2%
90+	3	6	9	0.6%
Total	701	799	1,500	100.0%

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	1	1	1	0.1%
1-3 Years	(1)	(1)	(3)	-0.2%
4-8 Years	(11)	(25)	(36)	-3.0%
9-13 Years	4	9	13	1.1%
14-18 Years	256	256	512	42.7%
19-24 Years	87	131	218	18.2%
25-29 Years	(62)	(62)	(124)	-10.3%
30-34 Years	(26)	(26)	(51)	-4.3%
35-39 Years	(11)	(5)	(15)	-1.3%
40-44 Years	34	34	67	5.6%
45-49 Years	13	31	44	3.7%
50-54 Years	21	32	54	4.5%
55-59 Years	52	52	105	8.7%
60-64 Years	52	35	87	7.3%
65-69 Years	47	70	117	9.8%
70-74 Years	45	45	90	7.5%
75-79 Years	43	29	72	6.0%
80-84 Years	11	17	28	2.3%
85-89 Years	5	8	13	1.1%
90+	2	5	7	0.6%
Total	564	636	1,200	100.0%

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	0	0	1	0.1%
1-3 Years	(1)	(1)	(1)	-0.1%
4-8 Years	(9)	(21)	(30)	-3.0%
9-13 Years	3	8	11	1.1%
14-18 Years	212	212	425	42.5%
19-24 Years	72	108	181	18.1%
25-29 Years	(46)	(46)	(92)	-9.2%
30-34 Years	(28)	(28)	(57)	-5.7%
35-39 Years	(9)	(4)	(13)	-1.3%
40-44 Years	28	28	56	5.6%
45-49 Years	11	26	37	3.7%
50-54 Years	18	27	44	4.4%
55-59 Years	46	46	93	9.3%
60-64 Years	43	29	72	7.2%
65-69 Years	39	58	97	9.7%
70-74 Years	39	39	78	7.8%
75-79 Years	36	24	59	5.9%
80-84 Years	9	14	23	2.3%
85-89 Years	4	7	11	1.1%
90+	2	4	6	0.6%
Total	470	530	1,000	100.0%

Source: Watson & Associates Economists Ltd., 2018.

Figure D-2 Continued

2036-2041

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	%
Under 1	0	0	0	0.0%
1-3 Years	(0)	(0)	(1)	-0.1%
4-8 Years	(7)	(16)	(23)	-2.8%
9-13 Years	2	6	8	1.0%
14-18 Years	162	162	323	40.4%
19-24 Years	55	82	137	17.2%
25-29 Years	(29)	(29)	(58)	-7.3%
30-34 Years	(20)	(20)	(40)	-5.1%
35-39 Years	(8)	(3)	(12)	-1.4%
40-44 Years	21	21	43	5.3%
45-49 Years	8	20	28	3.5%
50-54 Years	14	20	34	4.2%
55-59 Years	37	37	75	9.3%
60-64 Years	38	25	63	7.9%
65-69 Years	34	51	85	10.7%
70-74 Years	31	31	62	7.7%
75-79 Years	27	18	45	5.7%
80-84 Years	7	10	17	2.2%
85-89 Years	3	5	8	1.1%
90+	1	3	4	0.5%
Total	377	423	800	100.0%

Figure D-3
City of Belleville
Historical Age Specific Fertility Rates
Births Per Population

Year	Fertility Rates per 1,000 Females by Major Age Cohort							Total
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	
1991	0.0264	0.0816	0.1329	0.0798	0.0217	0.0036	-	1.7303
1992	0.0344	0.0959	0.1497	0.1004	0.0247	0.0031	0.0007	2.0447
1993	0.0366	0.1002	0.1314	0.0848	0.0322	0.0006	-	1.9284
1994	0.0393	0.0772	0.1238	0.0836	0.0235	0.0031	-	1.7526
1995	0.0433	0.0811	0.1264	0.0982	0.0256	0.0024	-	1.8853
1996	0.0366	0.0866	0.1113	0.0791	0.0282	0.0017	-	1.7178
1997	0.0318	0.0674	0.1032	0.0831	0.0263	0.0038	-	1.5782
1998	0.0320	0.0831	0.1077	0.0733	0.0338	0.0064	-	1.6813
1999	0.0272	0.0721	0.0981	0.0893	0.0321	0.0047	0.0006	1.6206
2000	0.0304	0.0890	0.1085	0.0977	0.0320	0.0031	-	1.8037
2001	0.0309	0.0657	0.1087	0.0751	0.0291	0.0041	-	1.5680
2002	0.0258	0.0710	0.1087	0.0959	0.0284	0.0036	-	1.6672
2003	0.0238	0.0822	0.1044	0.0851	0.0295	0.0061	-	1.6557
2004	0.0325	0.0773	0.1014	0.0929	0.0342	0.0041	-	1.7123
2005	0.0270	0.0666	0.0895	0.0998	0.0430	0.0056	-	1.6581
2006	0.0257	0.0715	0.1136	0.0912	0.0328	0.0071	-	1.7096
2007	0.0234	0.0735	0.0949	0.0972	0.0437	0.0064	-	1.6953
2008	0.0253	0.0749	0.1054	0.0966	0.0434	0.0050	-	1.7528
2009	0.0153	0.0572	0.0923	0.0990	0.0310	0.0064	-	1.5060
2010	0.0183	0.0629	0.1061	0.0832	0.0388	0.0092	-	1.5925
2011	0.0232	0.0440	0.0905	0.0951	0.0378	0.0090	-	1.4981
2012	0.0263	0.0576	0.0876	0.0943	0.0344	0.0055	-	1.5290
2013	0.0239	0.0484	0.0956	0.0811	0.0292	0.0054	-	1.4183
2014	0.0202	0.0425	0.1091	0.0951	0.0391	0.0061	-	1.5604
2015	0.0115	0.0498	0.1034	0.0942	0.0419	-	-	1.5038
2016	0.0053	0.0558	0.0870	0.1010	0.0259	-	-	1.3754
2017	0.0193	0.0567	0.0972	0.0937	0.0365	0.0053	-	1.5432
2018	0.0193	0.0568	0.0975	0.0940	0.0366	0.0053	-	1.5478
2019	0.0195	0.0573	0.0983	0.0948	0.0370	0.0054	-	1.5617
2020	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2021	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2022	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2023	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2024	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2025	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2026	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2027	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2028	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2029	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2030	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2031	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2032	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2033	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2034	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2035	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2036	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2037	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2038	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2039	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2040	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898
2041	0.0199	0.0584	0.1001	0.0965	0.0376	0.0054	-	1.5898

Source: Office of the Registrar General; Statistics Canada Demography Division

Forecast Provided by Watson & Associates Economists Ltd., 2018.

Figure D-4
City of Belleville
Share of Ministry of Finance Hastings County Population Forecast

City of Belleville Population (Including Census undercount) ¹

Cohort	1996	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-19	12,133	11,580	11,724	11,148	10,870	11,068	10,917	10,592	10,361	10,193
20-34	10,112	9,489	9,967	9,792	9,981	9,781	9,984	10,169	10,186	9,708
35-44	7,196	7,328	6,767	5,845	5,941	6,217	6,212	6,269	6,349	6,535
45-54	5,620	6,491	7,462	7,747	6,958	6,131	6,213	6,352	6,312	6,339
55-74	8,618	8,641	9,963	11,204	13,043	14,739	14,627	14,155	13,402	12,634
75+	3,811	4,235	4,763	4,969	5,147	6,278	7,910	9,561	11,362	12,895
Total	47,490	47,760	50,650	50,710	51,940	54,210	55,860	57,100	57,970	58,300

Ministry of Finance Population Projections for Hastings County¹

Cohort	1996	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-19	35,700	34,300	32,900	30,600	28,300	27,800	27,800	27,400	26,900	26,300
20-34	26,500	23,300	23,300	23,700	24,200	23,800	22,200	20,600	20,200	20,500
35-44	20,700	22,000	20,000	16,200	15,200	15,700	16,200	16,900	16,000	14,300
45-54	16,000	18,600	21,100	22,700	20,100	16,700	15,700	16,000	16,800	17,600
55-74	23,900	25,000	29,100	33,700	38,000	42,000	41,600	40,000	37,300	34,900
75+	8,100	9,100	10,300	11,500	12,800	14,900	18,400	21,900	26,000	29,600
Total	130,900	132,300	136,700	138,400	138,600	140,900	141,900	142,800	143,200	143,200

Source: Data from Statistics Canada, Demography Division, 1996-2016. Forecast is an estimate by Ministry of Finance, Spring 2017.

¹ Net population undercount estimated at approximately 2.5%

City of Belleville's Share of Hastings County Population

Cohort	1996	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-19	34.0%	33.7%	35.6%	36.4%	37.4%	39.8%	39.3%	38.7%	38.5%	38.7%
20-34	38.1%	40.7%	42.7%	41.4%	41.0%	41.1%	45.0%	49.3%	50.3%	47.3%
35-44	34.8%	33.4%	33.9%	36.2%	38.6%	39.7%	38.4%	37.1%	39.8%	45.6%
45-54	35.2%	35.0%	35.4%	34.1%	34.9%	36.7%	39.5%	39.7%	37.6%	36.1%
55-74	36.1%	34.6%	34.3%	33.3%	33.7%	35.1%	35.1%	35.4%	36.0%	36.2%
75+	47.0%	46.6%	46.2%	43.3%	41.2%	42.2%	43.0%	43.7%	43.7%	43.6%
Total	36.3%	36.1%	37.1%	36.7%	37.1%	38.5%	39.4%	40.0%	40.5%	40.7%

Note: Figures may not add precisely due to rounding.

Appendix E – City of Belleville Employment Forecast

**Figure E-1
City of Belleville
Employment Forecast, 2018 to 2041**

Period	Population	Activity Rate								Employment								Employment Total (Excluding Work at Home)
		Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ¹	Total Including N.F.P.O.W.	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total (Excluding NFPow)	N.F.P.O.W. ¹	Total Employment (Including N.F.P.O.W.)	
Mid 2001	45,986	0.002	0.025	0.196	0.299	0.145	0.667	0.037	0.704	85	1,145	9,023	13,773	6,650	30,675	1,685	32,360	29,530
Mid 2006	48,821	0.001	0.027	0.186	0.295	0.145	0.653	0.039	0.692	50	1,295	9,085	14,380	7,065	31,875	1,885	33,760	30,580
Mid 2011	49,454	0.002	0.024	0.165	0.259	0.171	0.620	0.042	0.662	115	1,165	8,150	12,795	8,440	30,665	2,095	32,760	29,500
Mid 2016	50,716	0.001	0.021	0.166	0.251	0.164	0.603	0.045	0.648	45	1,070	8,430	12,725	8,305	30,575	2,295	32,870	29,505
Mid 2018	51,627	0.001	0.021	0.158	0.251	0.161	0.592	0.0456	0.638	45	1,084	8,161	12,962	8,327	30,579	2,354	32,933	29,495
Mid 2021	52,891	0.001	0.022	0.159	0.251	0.160	0.592	0.0463	0.639	45	1,137	8,410	13,276	8,463	31,331	2,449	33,780	30,194
Mid 2026	54,500	0.001	0.023	0.161	0.252	0.159	0.595	0.0470	0.642	45	1,254	8,747	13,734	8,666	32,446	2,562	35,008	31,192
Mid 2031	55,706	0.001	0.023	0.161	0.252	0.1590	0.595	0.0477	0.643	45	1,281	8,952	14,038	8,857	33,173	2,657	35,830	31,892
Mid 2036	56,558	0.001	0.023	0.161	0.253	0.1580	0.596	0.0484	0.644	45	1,301	9,106	14,309	8,936	33,697	2,737	36,434	32,396
Mid 2041	56,882	0.001	0.023	0.1624	0.255	0.1580	0.599	0.0491	0.648	45	1,308	9,238	14,505	8,987	34,083	2,793	36,876	32,775
Incremental Change																		
Mid 2001 - Mid 2006	2,835	-0.0008	0.0016	-0.0101	-0.0049	0.0001	-0.0142	0.0020	-0.0122	-35	150	63	608	415	1,200	200	1,400	1,050
Mid 2006 - Mid 2011	633	0.0013	-0.0030	-0.0213	-0.0358	0.0260	-0.0328	0.0038	-0.0291	65	-130	-935	-1,585	1,375	-1,210	210	-1,000	-1,080
Mid 2011 - Mid 2016	1,262	-0.0014	-0.0025	0.0014	-0.0078	-0.0069	-0.0172	0.0029	-0.0143	-70	-95	280	-70	-135	-90	200	110	5
Mid 2016 - Mid 2021	2,175	0.0000	0.0004	-0.0072	0.0001	-0.0038	-0.0105	0.0010	-0.0095	0	67	-20	551	158	756	154	910	689
Mid 2016 - Mid 2026	3,784	-0.0001	0.0019	-0.0057	0.0011	-0.0048	-0.0075	0.0028	0.0096	0	184	317	1,009	361	1,871	267	2,138	1,687
Mid 2016 - Mid 2031	4,990	-0.0001	0.0019	-0.0055	0.0011	-0.0048	-0.0074	0.0024	-0.0049	0	211	522	1,313	552	2,598	362	2,960	2,387
Mid 2016 - Mid 2036	5,842	-0.0001	0.0019	-0.0052	0.0021	-0.0058	-0.0071	0.0031	-0.0039	0	231	676	1,584	631	3,122	442	3,564	2,891
Mid 2016 - Mid 2041	6,166	-0.0001	0.0019	-0.0038	0.0041	-0.0058	-0.0037	0.0038	0.0002	0	238	808	1,780	682	3,508	498	4,006	3,270
Annual Average																		
Mid 2001 - Mid 2006	567	0.000	0.000	-0.002	-0.001	0.000	-0.003	0.000	-0.002	-7	30	13	122	83	240	40	280	210
Mid 2006 - Mid 2011	127	0.000	-0.001	-0.004	-0.007	0.005	-0.007	0.001	-0.006	13	-26	-187	-317	275	-242	42	-200	-216
Mid 2011 - Mid 2016	252	0.000	0.000	0.000	-0.002	-0.001	-0.003	0.001	-0.003	-14	-19	56	-14	-27	-18	40	22	1
Mid 2016 - Mid 2021	435	0.000	0.000	-0.001	0.000	-0.001	-0.002	0.000	-0.002	0	13	-4	110	32	151	31	182	138
Mid 2016 - Mid 2026	378	0.000	0.000	-0.001	0.000	0.000	-0.001	0.000	0.001	0	18	32	101	36	187	27	214	169
Mid 2016 - Mid 2031	333	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0	14	35	88	37	173	24	197	159
Mid 2016 - Mid 2036	292	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0	12	34	79	32	156	22	178	145
Mid 2016 - Mid 2041	247	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0	10	32	71	27	140	20	160	131

Source: Watson & Associates Economists Ltd., 2018.

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

Appendix F – Water and Wastewater Infrastructure Review

Appendix F – Water and Wastewater Infrastructure Review

Water and wastewater infrastructure requirements for the proposed employment lands alternatives have been reviewed, including the existing zoned area north of Highway 401 and the alternative location south of Highway 401, east of the Northeast Industrial Park. The infrastructure review includes an estimation of servicing requirements based on volumetric flow rates, the corresponding infrastructure size for servicing the projected lands, and a review of existing Municipal infrastructure against the anticipated interconnection requirements. The review is based upon understood development density targets identified through the Municipal Comprehensive Review, the relevant regulatory guidelines from the Ministry of Environment, Conservation and Parks (MECP), and available background data provided by the City. For comparison purposes, an equal amount of employment lands was considered north and south of Highway 401 (140 hectares).

The expected planning density for the proposed 140 hectares of employment lands is 15 persons per hectare, or 15 pph. This density is below the MECP design guideline of 25 pph (*“Design Guidelines for Sanitary Works,”* Ontario Ministry of the Environment, 2007 section 5.5.1). The review presented below considers both planning densities. Coupled to the population equivalent is the design flow rate of between 225 litres per capita day (L/c/d) up to 475 L/c/d according to the MECP design guideline. A conservative value of 475 L/c/d is used for this analysis in order to avoid constraining ultimate design objectives. The projected demands for the purpose of comparison allow for 475 L/c/d water demand, from which an average recovery rate of 85% is applied to the sewer collection system with an additional allowance of 0.025 L/ha/s inflow and infiltration factor. The peak hour demand is estimated using a peak hour factor from the Harmon equation of 3.57 and 3.38 for 15 pph and 25 pph respectively. The basis for water and wastewater demand on the employment land is summarized in **Table 1** below.

Table 1: Water and Wastewater Servicing Estimates for Two Density Scenarios

Demand Scenario	Peak Hour Demand [L/s]		Nominal Pipe Size [mm]	
	Water	Wastewater ¹	Water ²	Wastewater ³
15 Persons / Hectare	41.2	42.7	150	350

Demand Scenario	Peak Hour Demand [L/s]		Nominal Pipe Size [mm]	
	Water	Wastewater ¹	Water ²	Wastewater ³
(PHD x3.57)	(20.6 per connection)			
25 Persons / Hectare (PHD x3.38)	65.1 (32.6 per connection)	65.4	250	600

¹ Wastewater demand assumes 85% recover of potable water within the sewer network plus an allowance for inflow and infiltration as noted in the text

² The nominal pipe size for water is established on the basis of up to two service interconnections (for looping of supply) to existing Municipal infrastructure to the development area and a maximum pipe velocity of 1.5 m/s at each service connection.

³ The nominal pipe size for wastewater is based on a maximum velocity of 0.60 m/s and one service interconnection to existing Municipal infrastructure.

The estimated demand for the proposed lands requires interconnection with the existing Municipal infrastructure. GIS data for the existing water and wastewater networks was compared to the demand requirements, specifically for the availability of suitable linear works to support the anticipated connections. The two land areas are distinguishable on the basis of servicing requirements.

The existing employment lands north of Highway 401 includes neither water transmission nor sanitary trunk sewer within the proposed development area. The nearest existing Municipal infrastructure is located east of Cannifton Road North. An existing service stub on Black Diamond Road is limited to 150 mm and would not be suitable for providing two interconnections for the required flow rates under either demand scenario. Servicing of this area may require water interconnection under Highway 401 to existing water network on University Avenue. Consequently, water supply to the lands north of Highway 401 would first require development of a water transmission main suitable for connection of either two 150 mm water mains, or two 250 mm mains. The sanitary network is also not developed within the lands north of Highway 401 and would similarly require extension of the existing Municipal system either to the Moira Trunk Sewer near Cannifton Road North, or south under the highway. The nearest sewer in the southward direction is at University Avenue and terminates in a 250 mm diameter sewer which is not expected to be adequate for the projected peak flows.

The proposed lands south of Highway 401 may have access to existing Municipal water main on College Street East, consisting of a 400 mm diameter water main. This main would be expected to provide either both interconnections, or, may include one interconnection from the proposed lands with the second connection at University Avenue. The sanitary sewer on College Street East is 675 mm according to the GIS data provided. The servicing of the lands south of Highway 401 appears to provide the water and wastewater infrastructure for interconnections.

A model analysis of the existing water distribution and sanitary wastewater collection networks was not consulted in the review of servicing for the two development alternatives. Consequently, the capacity of the existing systems was not confirmed for either location or demand scenario. However, **on the basis of available linear infrastructure it is the conclusion of this review that the lands south of Highway 401 would be expected to bring proposed development closer to existing infrastructure.** Both parcels of land would ultimately discharge sanitary waste to the existing Moira Trunk Sewer; however, the north parcel would impose the demand on a longer length of the trunk sewer than the southern lands and may consequently impose more influence on the sanitary network. Similarly, the employment lands north of Highway 401 are farther from water transmission pumping and would be expected to experience increased energy loss due to friction. **The alternative east of the existing industrial park would be expected to provide more efficient servicing** on the basis of existing infrastructure availability but excluding potential limitations of present operation and excludes a review of reserved capacity.

Appendix G – Analysis of Removal of Prime Agricultural Area



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CONSULTING

City of Belleville

Analysis of Removal of Prime Agricultural Area

Technical Appendix to Municipal Comprehensive Review Report

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Appendices

A	Official Plan Schedules A and B
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1.0 Introduction

A Land Exchange to Reduce the Oversupply and Improve the Marketability of Employment Lands

One of the City of Belleville's strategic objectives includes ensuring that there are suitable serviced employment lands to meet the needs of potential industrial and commercial investments and to establish a foundation for economic prosperity. The City's municipal comprehensive review (M.C.R.) determined that there is an oversupply of employment lands; however, the City lacks lands that are marketable to the industrial sector (i.e. not ideal in terms of location, configuration, and/or serviceability). In order to better serve Belleville's needs, the City would like to complete a land exchange to be better able to attract industries in key areas, while also avoiding exacerbating the surplus.

Achieving a Net Reduction of 110 Hectares of Employment Land

While there are opportunities for employment land development within the existing settlement area, a portion of these lands, located in the Cannifton East Industrial Area, are less marketable for future industrial development, restricting their economic development potential. It is recommended that adjusting the Urban Serviced Area to include municipally-owned lands on the east side of the City, adjacent to the North East Industrial Park, will strengthen the employment land base and provide a broader market choice of employment lands. These lands are currently designated in the Official Plan as agricultural lands (see Figure 1). In order to protect the City's supply of agricultural lands, and to avoid exacerbating the City's existing surplus of employment lands, it is proposed that a greater amount of lands currently designed as employment lands are removed from the settlement area and designated for agricultural use; hereafter referred to as the "land exchange" (see Figure 2).

Figure 1: Excerpt from Schedule A of the City of Belleville Official Plan

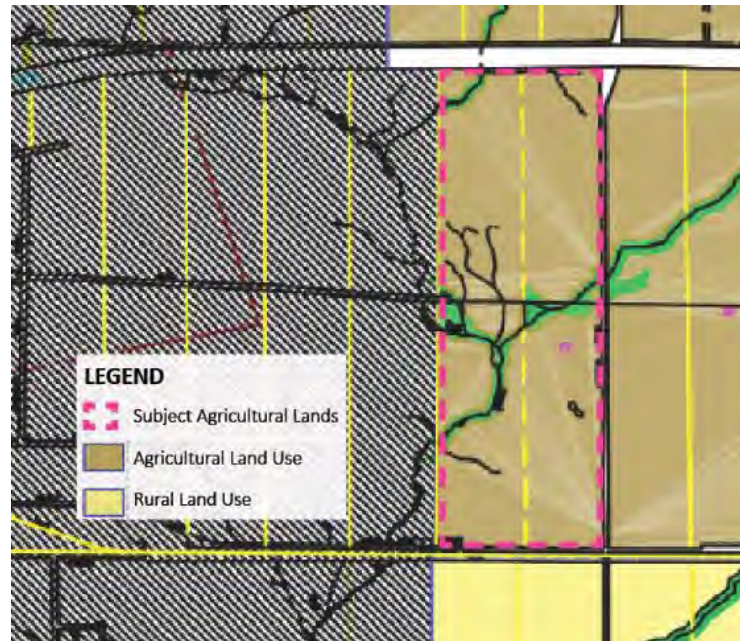
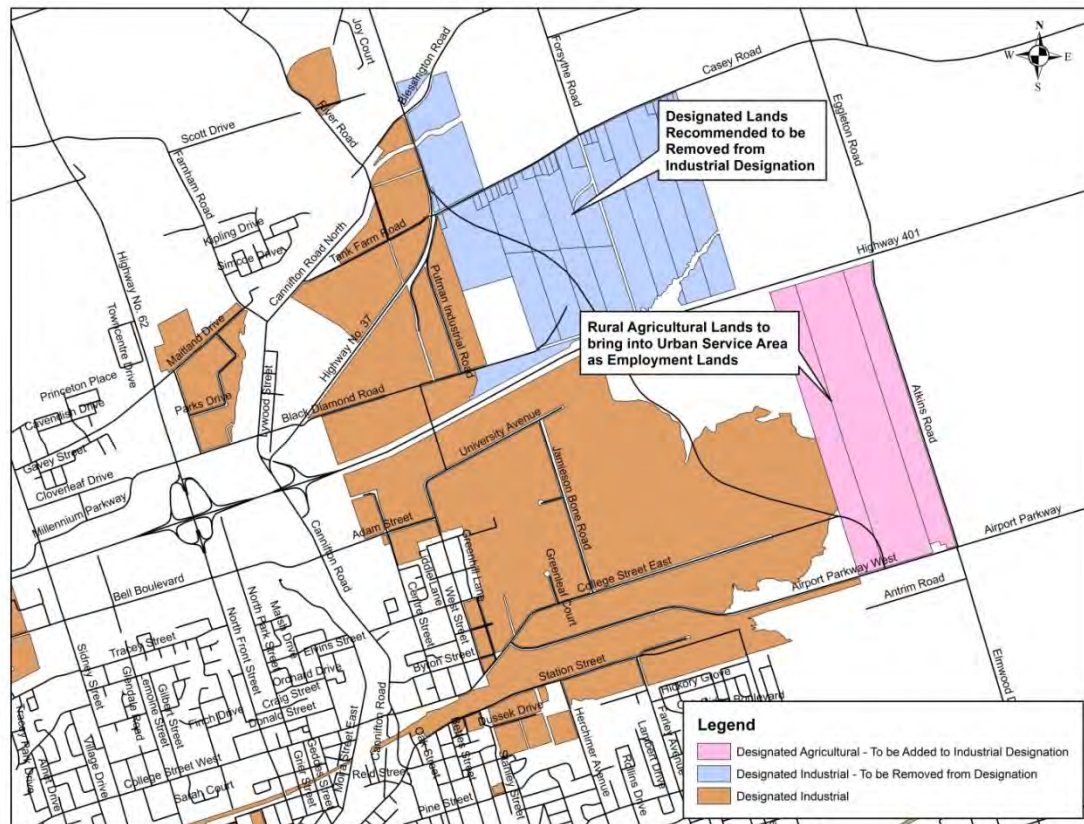


Figure 2: Land Exchange



The land exchange proposes to:

- Add 166 hectares of agricultural lands located east of the Northeast Industrial Park to the Urban Service Area and designate for employment use; and,
- Remove 276 hectares of employment lands located north of Highway 401 and east of the hydro corridor from the Urban Serviced Area and designate for agricultural use;
- Resulting in a **net reduction of 110 hectares of employment lands** within Belleville's settlement area boundary.

The Provincial Policy Statement, 2014 (P.P.S.) states that a settlement area expansion is only permitted at the time of a municipal comprehensive review, and only where it has been demonstrated that, in agricultural areas, the lands do not comprise specialty crop areas, alternative locations have been evaluated, and there are no reasonable alternatives that avoid prime agricultural areas or on lower priority agricultural lands, the expansion complies with Minimum Distance Separation (M.D.S.) formulae, and impacts to existing agricultural operations which are adjacent or in close proximity to the settlement area are mitigated to the extent feasible. Although the overall supply of designated agricultural lands will increase as a result of the land exchange, the purpose of this report is to satisfy the conditions outlined in **P.P.S. policies 1.1.3.8 c) through e)**, as well as demonstrate that the land exchange conforms to P.P.S. policies **1.1.1** and **1.1.3**, and **Sections 2** and **3**.

2.0 Analysis of P.P.S. Conformity

To determine the appropriateness of the proposed removal of agricultural lands, an evaluation of the planning issues and impacts has been undertaken. The scope and level of detail of the planning evaluation has been based on the P.P.S. The approach used attempts to consolidate the relevant policies and criteria, and identify and evaluate the potential planning and land use related issues associated with the proposed land exchange.

2.1 Provincial Policy Statement

Our analysis suggests that the proposed land exchange is consistent with the P.P.S. in the following ways, they are:

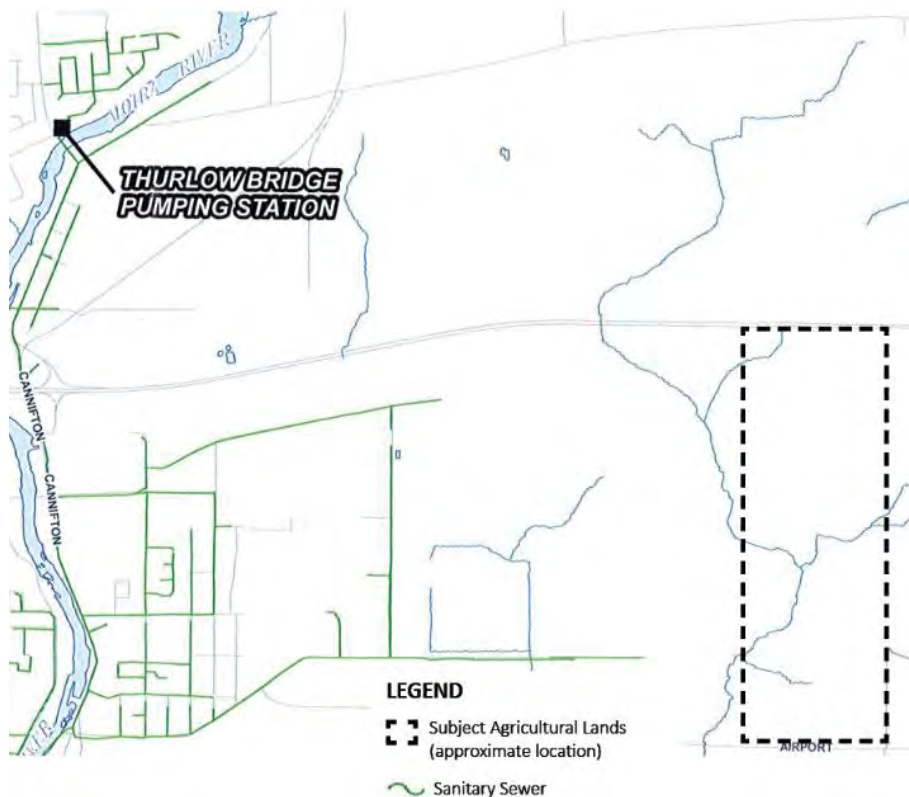
2.1.1 P.P.S. Section 1.1.1 – Healthy, Liveable and Safe Communities

P.P.S. Policy	How the Proposal Conforms to the P.P.S. Policy 1.1.1
1.1.1 a)	The proposed relocation of future employment lands promotes efficient development and land use patterns that help to sustain the financial well-being of the City over the long term; the addition of lands adjacent to the Northeast Industrial Park will strengthen the City's competitive position in terms of land marketability, increasing the municipal tax base.
1.1.1. b)	The proposed land exchange will ensure an appropriate range and mix of land uses are available to meet long-term needs by relocating employment lands to a more appropriate area of Belleville while also reducing the overall surplus of employment lands in the City.
1.1.1 c)	The proposed land use pattern is not assumed to create new risks to the environment or public safety. Any future employment use of the lands would be subject to all applicable Municipal and Provincial policies to ensure adequate protection of the environment and public safety.
1.1.1 d)	The proposed land exchange results in a contiguous settlement boundary , which enables the efficient use of the settlement area.
1.1.1 e)	The lands proposed to be added to the settlement area for employment use, are situated adjacent to the Northeast Industrial Area, which promotes a cost-effective development pattern by minimizing servicing costs associated with extending services across Highway 401.
1.1.1 f)	Not applicable.
1.1.1 g)	The expansion of the Urban Serviced Boundary adjacent to the existing industrial park will allow the City to make use of existing linear works; see the servicing analysis in Appendix F, herein, for more information. Phasing policies introduced as part of the Official Plan review will ensure additional infrastructure is provided in a logical order [see section 1.1.3.7 a) and b), below].
1.1.1 h)	Not applicable.

2.1.2 P.P.S. Section 1.1.3 – Settlement Areas

P.P.S. Policy	How the Proposal Conforms to the P.P.S. Policy 1.1.3
1.1.3.1	The proposed land exchange sees the realignment of the Urban Serviced Area, in order to support the vitality of the City’s employment lands, by creating opportunities for employment growth adjacent to the existing Northeast Industrial Area.
1.1.3.2	The proposed land exchange promotes the efficient use of land and resources by locating future industrial development adjacent to an existing industrial park, preventing the creation of an urban boundary with rural lands within it, and reducing the overall extent of Urban Serviced Area. Further, the provision of infrastructure will be more economical due to the proximity to existing services, as opposed to extending services across Highway 401 (see Figure 3).
1.1.3.3	The M.C.R. has identified that the majority of employment growth that will be accommodated through intensification (estimated 10%), will be accommodated through the up-take of current vacant industrial GFA and the expansion of existing developed properties (see Section 9.5 of the M.C.R. report).
1.1.3.4	Not applicable.
1.1.3.5	A minimum density target (15 jobs per net hectare) will be planned for employment lands to ensure that appropriate intensification and redevelopment is occurring prior to the use of greenfield lands.
1.1.3.6	The proposed land exchange and realignment of the Urban Serviced Area boundary will facilitate development adjacent to the existing built up area, and would result in a smaller boundary overall, promoting compact form and allowing for the efficient use of land.
1.1.3.7	a) Phasing policies for Industrial lands will be established through the course of the Official Plan update in order to ensure that the intensification targets established during the M.C.R. are achieved prior to, or concurrently, with growth within designated growth areas.
	b) Phasing policies will address the necessary extension of infrastructure to accommodate future development in the North East Industrial Area to ensure the orderly provision of services and prevent the development of areas that are not immediately serviceable.
1.1.3.8	a) Although Belleville has a sufficient supply of employment lands to meet long-term needs to 2038, the land exchange will complement and strengthen the existing North East Industrial Park and strengthen the City’s competitive position in terms of economic development potential.
	b) See section 1.1.3.7 a) and b), above, which address the necessary provision of infrastructure.
	c) to e) Detailed in the following section.

Figure 3: Excerpt from Waste Water Master Plan



2.1.3 P.P.S. Section 1.1.3.8 – Expansion of a Settlement Area Boundary

Although the proposed land exchange would see no net loss of agricultural land, an assessment was undertaken to review the lands proposed to be removed from the agricultural designation in order to comply with P.P.S. policy 1.1.3.8, namely conditions c) through e).

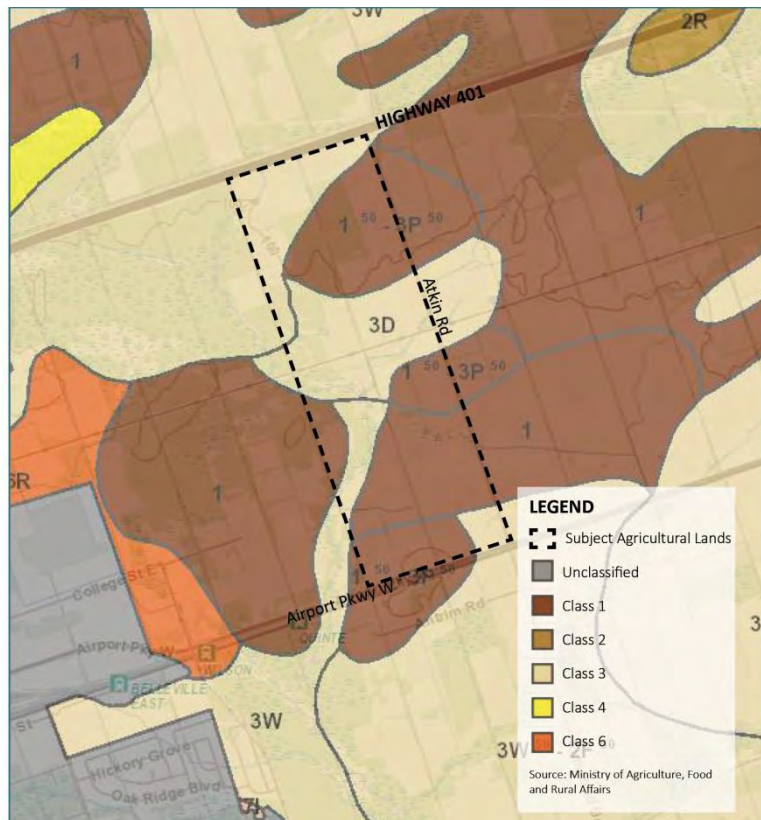
P.P.S. Policy	How the Proposal Conforms to the P.P.S. Policy 1.1.3.8
1.1.3.8 c)	<p>1. The agricultural lands proposed to be removed do not comprise of specialty crop areas, as per the City’s Official Plan Schedules or the Ministry of Natural Resources and Forestry mapping.</p> <p>2.i. It is most appropriate from a land use conflict perspective to direct future industrial development to areas that are currently used for that purpose. As such, lands adjacent to the Northeast Industrial Park were considered as alternative locations to accommodate the expansion of the industrial park. Growth of the Northeast Industrial Park is constrained as follows:</p> <p>To the north – Constrained by Highway 401</p> <p>To the south – Constrained by railway, and further south by existing industrial and residential lands</p> <p>To the west – Constrained by built-up residential and community facility lands</p> <p>To the east – Constrained by agricultural land use designation.</p>

P.P.S. Policy	How the Proposal Conforms to the P.P.S. Policy 1.1.3.8
	<p>As shown above, the logical direction for the reconfiguration of the Urban Serviced Area to accommodate more employment land is to the east of the existing industrial park. The current land uses on these lands include vacant lands, farm buildings, and rural residential uses (see Figure 4).</p>
1.1.3.8 d)	<p>2.ii. Alternatives on lower priority agricultural lands were considered, however due to the constraints identified previously, the only alternative in the area adjacent to the existing employment lands would be those agricultural lands located further east to the proposed lands to be added.</p> <p>These are not a viable alternative as those lands are higher priority, primarily consisting of Class 1 lands (see Figure 5), and their addition would result in the creation of an Urban Serviced Area that is surrounded by rural area.</p> <p>Policy guidance will be provided through the Official Plan update that ensures the compatibility between existing uses and future employment uses proposed as a result of the redesignation of lands. Wherever possible, uses known to have issues of compatibility will be co-located, to reduce the impacts of incompatibility to the greater area. Additionally, reference to M.D.S. requirements will be included in the updated Official Plan and compliance will be required as part of the permitting process through the City.</p>
1.1.3.8 e)	<p>Issues of incompatibility are limited due to the existing constraints in the subject area, including the Highway to the north, and the railway to the south, which serve as buffers for the existing adjacent land uses. Potential impacts on any existing agricultural operations will be mitigated through the policy guidance discussed in section 1.1.3.8 d), above.</p>

Figure 4: Land Uses



Figure 5: Soil Capability for Agriculture



2.1.4 P.P.S. Section 2 – Wise Use and Management of Resources

The City's approach to the land exchange is consistent with the Province's interest in the wise use and management of resources. The land exchange provides a balanced way to facilitate economic development in appropriate areas while also protecting provincial interests such as the protection of agricultural lands. Namely, section 2.3.5.1, which is concerned with the removal of agricultural lands is addressed in the above analysis of section 1.1.3.8. Further, the proposed land exchange sees no net loss of agricultural lands.

Cultural heritage and archaeology resources will be identified and protected through proper studies at the time of proposal.

2.1.5 Section 3 – Protecting Public Health and Safety

There are no lands identified as natural hazards within the subject area based on a review of the City's Official Plan (see Appendix A). To our knowledge there are also no known human made hazards in the subject area. Should any areas of natural or human-made hazards be identified in the future, development will be directed away from those lands where there is an unacceptable risk to the public, property, or which would aggravate the hazards.

3.0 Conclusion

The City wishes to improve its competitive position when it comes to attracting industrial development. The repositioning of employment lands will allow for future development of the lands adjacent to an existing industrial park, which the City believes are more economically viable than the lands currently designated for future employment use north of Highway 401. The lands proposed to be added to the Urban Service Area as employment lands are currently designated as agricultural lands; this report served to justify their redesignation by confirming conformity with the P.P.S. Further, in order to not exacerbate the existing surplus of designated employment lands, the City proposes to remove a greater amount of employment lands north of the 401 from the employment designation, and designate those lands for agricultural use, thereby increasing the overall supply of agricultural lands.

In summary, the proposed land exchange:

- will create much-needed opportunities for employment growth adjacent to the existing Northeast Industrial Area;
- promotes a cost-effective development pattern by minimizing servicing costs associated with providing services across Highway 401;
- does not result in a discontinuous settlement area boundary and will result in a **smaller urban boundary overall arising from a reduction of 110 hectares of land**, promoting compact form and allowing for the efficient use of land;
- is the preferred option, when considering alternative locations, including consideration for lower-priority agricultural lands;
- does not include lands that are comprised of designated specialty crop areas;
- does not result in any net loss of agricultural land, nor does it exacerbate the surplus of employment lands; and,
- conforms with all other relevant policies of the P.P.S.

For the reasons summarized above and provided throughout the report, the removal of the subject agricultural lands as part of the land exchanged is consistent with the Province's interests as outlined in the P.P.S.

Appendix F-2

Official Plan Schedules A and B

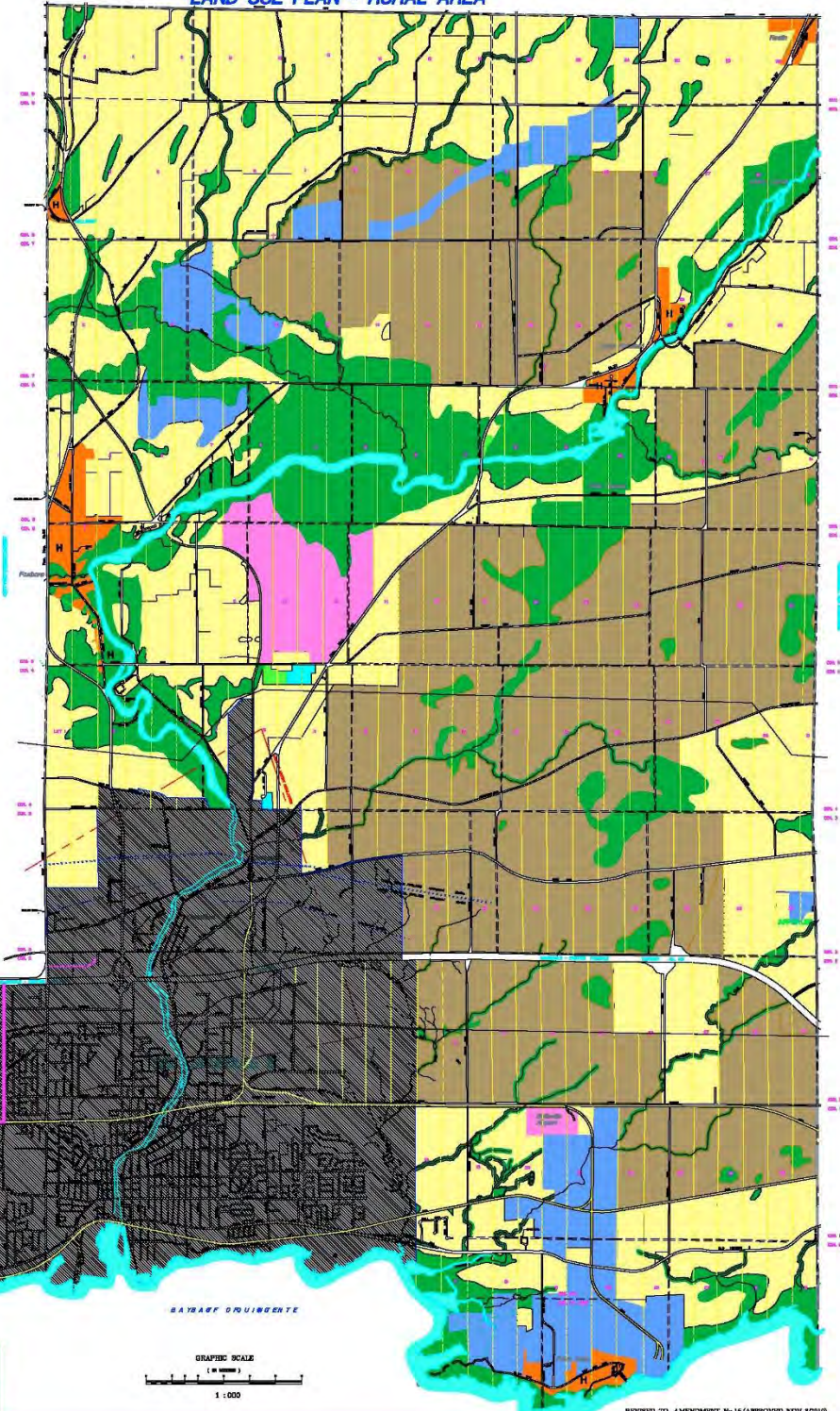


CITY OF BELLEVILLE OFFICIAL PLAN SCHEDULE 'A' LAND USE PLAN - RURAL AREA



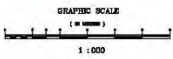
LEGEND

- WALLEY
- AGRICULTURAL LAND USE
- RURAL LAND USE
- ENVIRONMENTAL PROTECTION
- RECREATION COMMERCIAL LAND USE
- CITY CENTRE
- COMMERCIAL LAND USE
- RESIDENTIAL LAND USE
- RESIDENTIAL LAND USE
- OPEN SPACE
- MUNICIPAL INFRASTRUCTURE
- COMMUNITY FACILITY
- 100-YEAR EXCEEDED FLOODLINE
- WALLEY BOUNDARY
- PORT JANE SPECIAL STUDY AREA
- TROTTON AIRPORT REGULATIONS
- AGRICULTURE LICENCE BOUNDARY
- STP1 SEWAGE TREATMENT PLANT
- STP2 WATER TREATMENT PLANT
- CEMETERY
- OIL/GAS PIPELINE



See Localised Secondary

Anley CONSULTING ENGINEERS PLANNERS	
Project No.	0196
Client	City of Belleville
Scale	AS SHOWN
Author	DMG
Check	DMG
Drawn	DMG
Approved	DMG
Date	2022-01-01



REVISED TO AMENDMENT No.18 (APPROVED NOV. 2010)





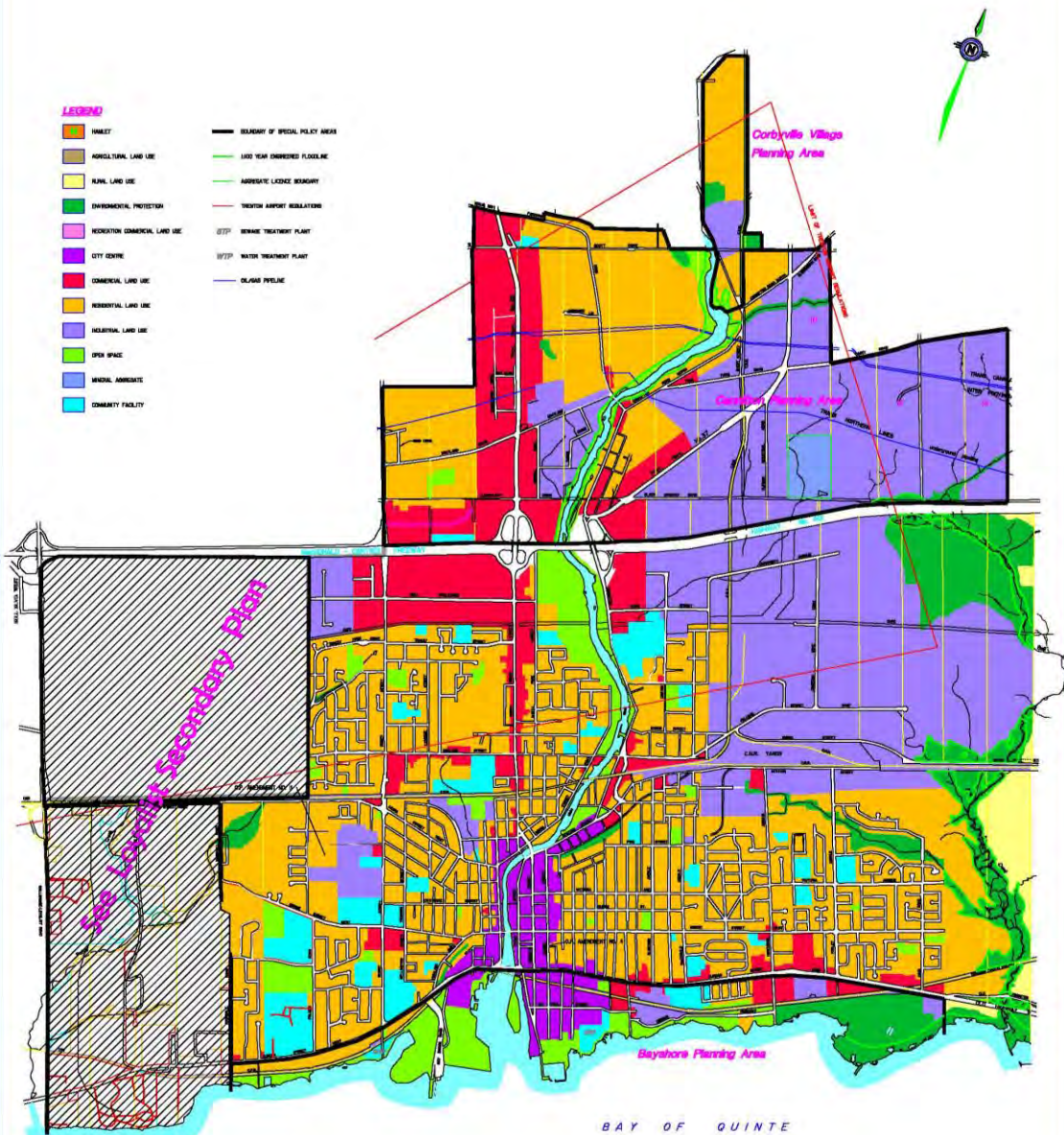
CITY OF BELLEVILLE - OFFICIAL PLAN

SCHEDULE 'B'

LAND USE PLAN - URBAN SERVICED AREA

LEGEND

- UNMET
- AGRICULTURAL LAND USE
- RURAL LAND USE
- ENVIRONMENTAL PROTECTION
- RECREATION COMMERCIAL LAND USE
- CITY CENTRE
- COMMERCIAL LAND USE
- RESIDENTIAL LAND USE
- INDUSTRIAL LAND USE
- OPEN SPACE
- MARINE ADJACENTE
- COMMUNITY FACILITY
- BOUNDARY OF SPECIAL POLICY AREA
- 100 YEAR ENGINEERED FLOODLINE
- ADEQUATE LOADLINE BOUNDARY
- TRUCKER AIRPORT REGULATIONS
- STP1 WASTE TREATMENT PLANT
- STP2 WATER TREATMENT PLANT
- OLAGAS PIPELINE



Anley CONSULTING ENGINEERS PLANNERS

PROJECT NO.	DATE	BY
98520-U		



REVISED UP TO AND INCLUDING AMENDMENT NO. 18 (APPROVED NOVEMBER 8, 2010)