



Growth Management Strategy

Lanark County

Draft Report

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In association with:



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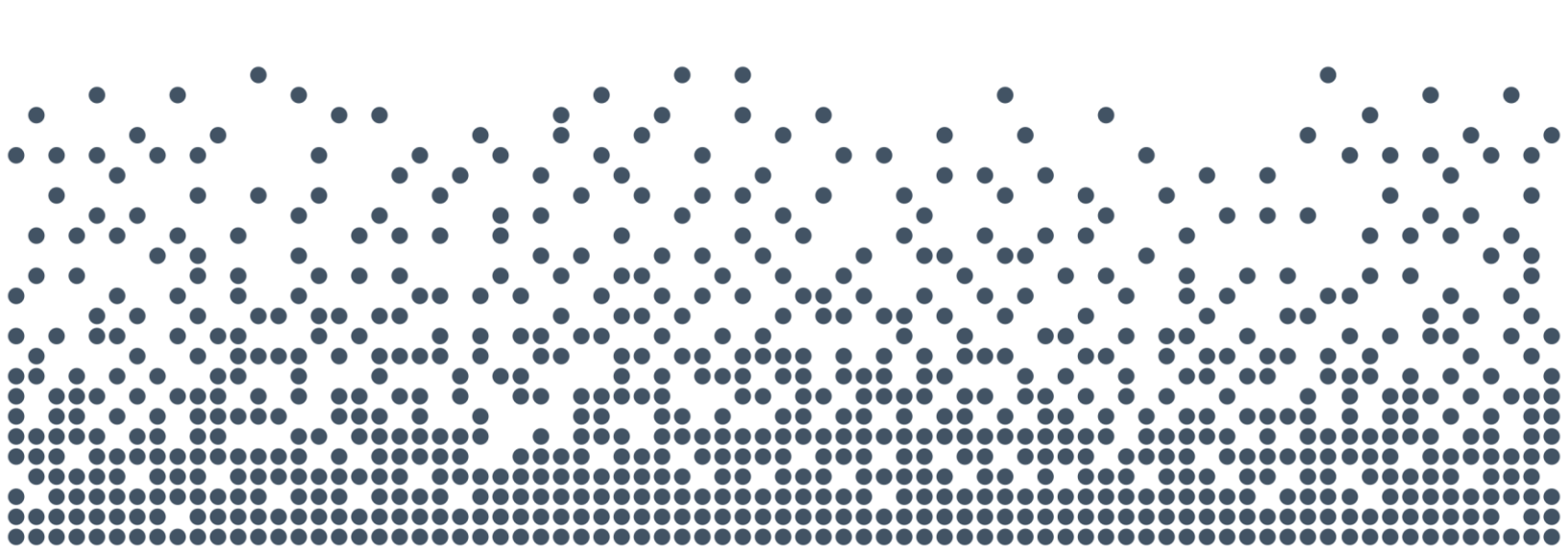
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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
BOC	Bank of Canada
COVID-19	Coronavirus disease
CR	Comprehensive Review
EORN	Eastern Ontario Regional Network
GDP	Gross domestic product
GMS	Growth Management Strategy
IMF	International Monetary Fund
MDS	Minimum Distance Separation
MOF	Ministry of Finance
MZO	Minister's Zoning Orders
NFPOW	No fixed place of work
NHS	National Household Survey
NPR	Non-permanent residents
OP	Official Plan
PMI	Purchasing Managers' Index
PPS	Provincial Planning Statement
PPU	Persons Per Unit
SABE	Settlement Area boundary expansion
SCOP	Sustainable Communities Official Plan
U.S.	United States



Executive Summary



Executive Summary

Introduction

Watson & Associates Economists Ltd. (Watson) in partnership with W.S.P. was retained by Lanark County in March 2023 to prepare the County's Growth Management Strategy (GMS). The final study will form an important background document to inform amendments to the County's Sustainable Communities Official Plan (SCOP). The GMS is to be completed in the following five phases:

- Background study review
- County-wide growth forecast
- Growth allocations for area municipalities and urban / serviced Settlement Areas
- Urban land needs and growth options
- Policy and strategic recommendations

Lanark County Historical Population, Housing and Employment Growth Trends, 2001 to 2021

Over the past several decades, the provincial economy has been steadily shifting away from goods-producing sectors and moving towards services-producing and knowledge-based sectors. As a result of these continued structural changes occurring in the macroeconomy, it is important to recognize that the trends mentioned within this chapter will generate both positive and disruptive economic impacts related to employment growth, local business investment, and labour force demand. These disruptive forces are also anticipated to have long-term impacts on non-residential space requirements, as well as population growth patterns.

Population growth rates have been increasing across the County for close to the past decade following the gradual economic recovery from the 2008/2009 economic downturn, with a more substantial increase between 2016 and 2021. This higher population growth trajectory is anticipated to remain over the long term, notwithstanding downward economic trends and real estate market trends that have been experienced locally recently.



Since the onset of the pandemic, COVID-19 has acted as a near-term driver of housing demand, led by increased opportunities for remote work or hybrid models. This has led to the reconsideration by some Ontario residents to trade “County lifestyles” for a greater balance of urban and rural living.

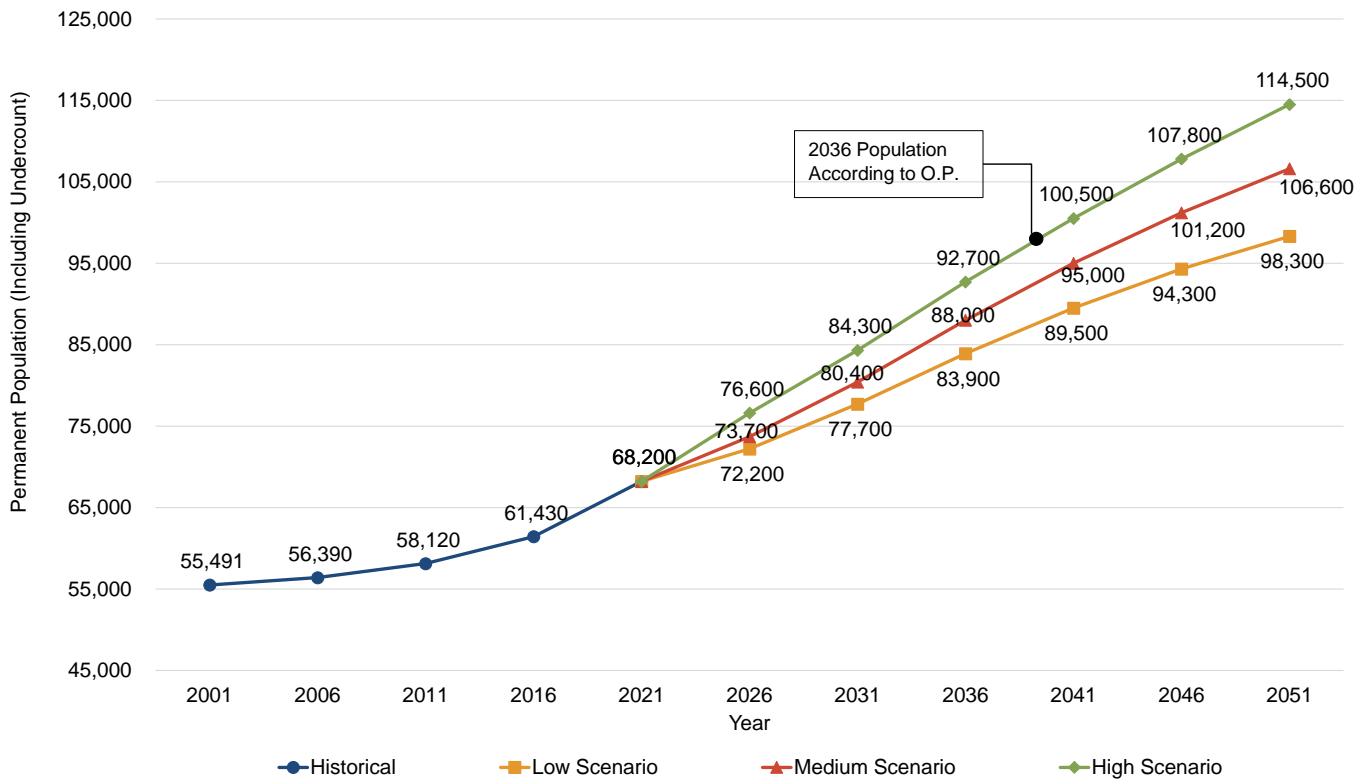
Lanark County is situated approximately 30 kilometres west of the city center of Ottawa. This makes the County an attractive area for commuters and those seeking a more rural lifestyle while still having access to the amenities within the City of Ottawa. For Lanark County, outward growth pressure is anticipated to be most heavily felt from the City of Ottawa as well as other urban Settlement Areas in neighbouring municipalities to Lanark County. It is recognized that the longer-term population and employment growth potential for Lanark County will be heavily dependent on the sustained economic growth potential of the broader economic region and the City of Ottawa.

Lanark County Population and Housing Growth Outlook to 2051

Figure ES-1 summarizes three long-term population forecast scenarios for Lanark County over the 2021 to 2051 forecast period relative to the historical population growth between 2001 and 2021. Based on a comprehensive assessment of local, regional and Provincial demographic and economic trends, it was recommended by the Consultant Team that the Medium Growth Scenario be used as the long-term forecast for the County. Under the Medium Growth Scenario, the population within Lanark County is forecast to grow at an annual rate of approximately 1.5% over the forecast period and reach 106,600 residents by 2051. This level of growth represents a slightly increased growth outlook compared to the 2024 Ministry of Finance (MOF) forecast.



Figure ES-1
Lanark County
Long-term Forecast Population Scenarios, 2021 to 2051



Growth Scenarios	2021 Population	2051 Population	2021 to 2051 Population Growth	Annual Population Growth	Annual Population Growth Rate
Low Scenario	68,180	98,300	30,120	1,000	1.2%
Medium Scenario	68,180	106,600	38,420	1,280	1.5%
High Scenario	68,180	114,500	46,320	1,540	1.7%

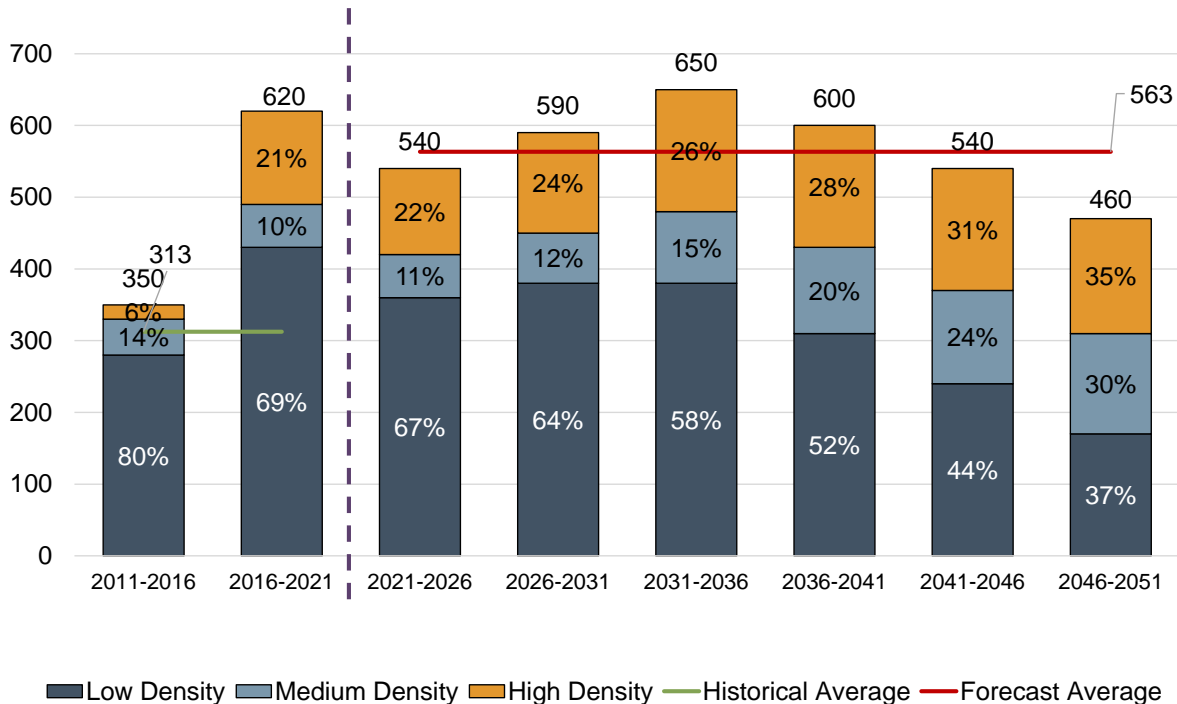
Source: 2001 - 2021 derived from Statistics Canada Census data, and 2051 by Watson & Associates Economists Ltd.

Accommodating forecast population growth across the County to the year 2051 will require approximately 16,910 new households, which results in an increase of about 560 units annually or an annual housing growth rate of 1.6% per year. Comparatively, the average housing growth in the historical 10-year (2011 to 2021) period was about 310 units per year (refer to Figure ES-2). To adequately accommodate future housing



demand across a diverse selection of demographic and socio-economic groups, a full range of new housing typologies will be required with respect to built-form, location, tenure and affordability across Lanark County.

Figure ES-2
Lanark County
Annual Household Forecast – 2001 - 2051



Notes:

- Low density includes single and semi-detached units.
- Medium density includes townhouses and apartments in duplexes.
- High density includes stacked townhouses, apartments (bachelor, 1-bedroom and 2-bedroom+) in buildings that have fewer than five stories, apartments (bachelor, 1-bedroom and 2-bedroom+) in buildings that have five or more stories, and secondary suites.
- Housing by type has been inferred based on Statistics Canada's classification of dwellings by structural type.

Source: 2001 to 2021 from Statistics Canada Census 2001-2021. Forecast by Watson & Associates Economists Ltd.

New residential development within Lanark County is anticipated to gradually shift away from low-density housing forms, largely driven by declining housing affordability associated with low-density housing options, as well as the increased demand for high-density housing associated with the growing seniors population. This shift in the share

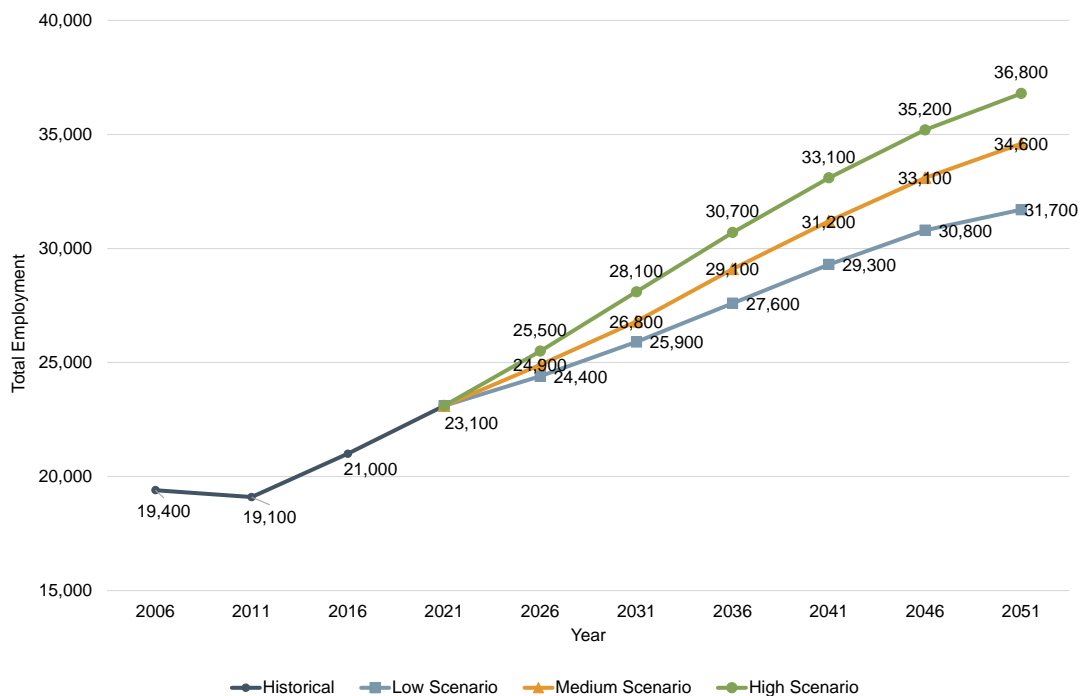


of medium and high-density housing forms is anticipated to be more pronounced in the County's Urban Areas associated with the stronger market demand and available infrastructure to support residential intensification and higher-density housing forms in these areas. Over the 2021 to 2051 forecast period, new housing is expected to be comprised of 54% low-density (singles and semi-detached), 18% medium-density (multiples), and 27% high-density (apartments and accessory apartments) units. While the share of medium- and high-density units is anticipated to increase, the overall housing base in the County would still largely comprise low-density housing.

Lanark County Employment Growth Outlook to 2051

It is important to recognize that future population and employment growth within Lanark County strongly correlate with the growth outlook and competitiveness of the broader region, specifically the surrounding municipalities which fall within the County's commuter shed, in particular the City of Ottawa. Figure ES-3 summarizes three long-term employment forecast scenarios for Lanark County over the 2021 to 2051 forecast period relative to historical employment trends between 2001 and 2021.

Figure ES-3
Lanark County
Long-Term Total Employment Forecast Scenarios, 2021 to 2051





Employment Growth Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	23,100	31,700	8,600	290	1.1%
Medium Scenario	23,100	34,600	11,500	380	1.4%
High Scenario	23,100	36,800	13,700	460	1.6%

Note: Figures have been rounded. Activity rate uses population including the net Census undercount.

Source: 2006 to 2021 derived from Statistics Canada Census data, 2023 derived from Statistics Canada Census and EMSI data; scenarios by Watson & Associates Economists Ltd.

Similar to population growth, the Medium Scenario has been identified as the recommended long-term employment growth forecast for the County. Under this scenario, the total employment base for Lanark County is forecast to steadily increase to approximately 34,600 jobs by the year 2051. This represents an increase of approximately 11,500 new jobs between 2021 and 2051, or an average annual employment growth rate of 1.4% during this period.

The County's employment growth is anticipated to be driven largely by population-related employment (including retail, accommodation and food services, and a range of knowledge-based sectors). Local employment opportunities associated with export-based employment sectors (e.g., transportation and warehousing, wholesale trade, construction and manufacturing) are also anticipated to experience moderate to steady growth. A sizeable percentage of forecast job growth is also anticipated to be accommodated through home occupations, home-based businesses, and off-site employment.

Population and Employment Growth Allocations by Urban Settlement Area and Remaining Rural Areas

Between 2021 and 2051, the urban Settlement Areas of Almonte, Carleton Place, and Perth are anticipated to accommodate approximately 60% of Lanark County's overall population growth. This concentration aligns with historical trends and emphasizes the ongoing urbanization in these areas. Carleton Place is forecast to experience the highest population growth rate over this period, followed closely by Mississippi Mills and Perth. Meanwhile, rural areas will continue to host a significant share of the population, although their overall proportion is expected to decrease as urban areas expand.



A substantial portion of the housing growth in urban areas will be focused on high-density and medium-density developments, particularly in Almonte, Carleton Place, and Perth. Over the forecast period, 40% of urban housing growth is expected to be in the form of apartments and stacked townhomes. Rural areas are forecast to see 6,720 new residential units, predominantly single and semi-detached homes, with a smaller share dedicated to multiple-unit housing forms such as townhouses and duplexes.

Employment growth across Lanark County is expected to be robust, with urban centers like Mississippi Mills, Carleton Place, and Perth leading the way. Together, these areas will account for the majority of job creation, driven by commercial, work-at-home, and institutional employment. Mississippi Mills is forecast to see the largest overall employment increase, supported by significant population growth and a corresponding need for services.

Rural municipalities like Tay Valley and Lanark Highlands will experience steady but more modest employment growth, focused on work-at-home opportunities and a balanced mix of population-related and industrial jobs. Perth stands out with a relatively high concentration of industrial employment, bolstered by a considerable supply of vacant industrial land. County-wide, the work-at-home sector is anticipated to be a significant driver of employment growth, reflecting ongoing shifts in work patterns.

Urban Land Needs Assessment to 2051

Based on the long-term land needs assessment conducted as a part of the GMS, the County's aggregate supply of designated land within its urban Settlement Areas is sufficient to accommodate urban housing demand over the 27-year planning horizons at a County-wide level. On an Area Municipal level, however, Mississippi Mills and Carleton Place have a deficit of six gross ha and two gross ha respectively. The PPS, 2024 presents a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Given the small nature of the deficits identified above over the 27-year planning horizon, there is a sufficient amount of residential land available in each municipality to satisfy the 20-year minimum requirement for land. Further to this, a further review of residential intensification opportunities is recommended for each of the local municipalities, which would ultimately have an impact on the land needs. Given that the 20-year PPS requirement is satisfied, it is recommended that the County and its local municipalities reassess the land needs after this intensification review has been conducted.



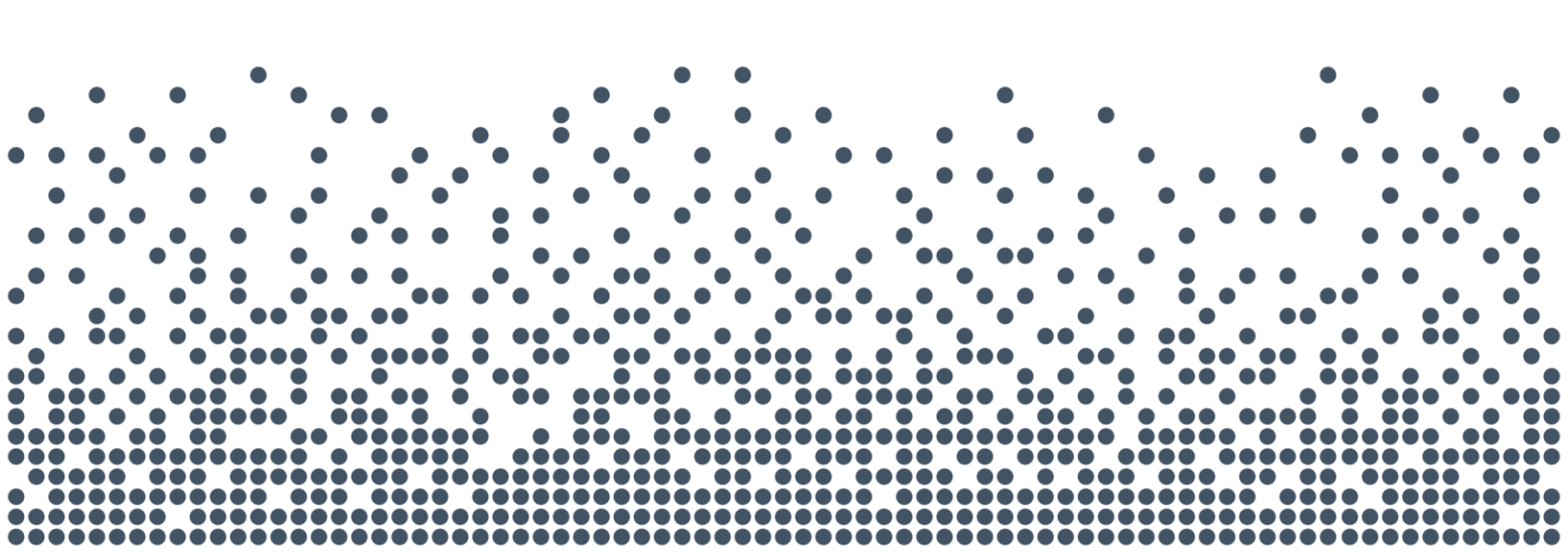
By 2051, Perth is expected to have a modest surplus of 11 net ha of vacant urban Employment Areas, while Carleton Place is projected to fully utilize its employment lands. In Almonte, Mississippi Mills, a deficit of 9 net ha (12 gross ha) is anticipated by 2051. Given the small scale of this shortfall in both 2044 (20-year PPS requirement) and 2051, immediate action is not required. A re-evaluation of employment land needs is recommended during the County's next CR process.

Policy Recommendations

- Residential Growth
 - Maintain a distinct Settlement Area Structure
 - Plan for Population Growth
 - Update County-Wide Housing Projections
 - Promote and Plan for Residential Intensification
 - Responsibly Manage Municipal Servicing Infrastructure
 - Develop a Robust Plan Monitoring and Evaluation Framework

- Non-Residential Growth
 - Plan for Employment Uses Under a New Provincial Policy Framework
 - Plan for Future Employment Area Lands Development and Strategically Plan New Employment Areas
 - Protect Employment Areas
 - Explore Opportunities for Intensification of urban Employment Lands
 - Conduct a Commercial Land Needs Study that Specifically Addresses the County's Retail Requirements and Commercial Structure
 - Encourage Eco-Industrial Development Approaches to Employment Lands Development and Strengthen Policies for Climate Change Adaptation
 - Identifying Employment Opportunities in the Rural Area

The growth forecast for Lanark County indicates a substantial rise in development activity compared to previous decades. Regular monitoring of this forecast will help the County and its residents better understand current real estate trends, demographic conditions, the progress of development initiatives, population and housing growth relative to OP targets, and the impact of OP policies on urban patterns. This analysis will also support regular assessment of broader growth management objectives and performance measures.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson) in partnership with W.S.P. was retained by Lanark County in March 2023 to prepare the County's Growth Management Strategy (GMS). The final study will form an important background document to inform amendments to the County's Sustainable Communities Official Plan (SCOP). The GMS is to be completed in the following five phases:

1. Background study review
2. County-wide growth forecast
3. Growth allocations for area municipalities and urban / serviced Settlement Areas
4. Urban land needs and growth options
5. Policy and strategic recommendations

1.2 Provincial Planning Context: Provincial Policy Statement, 2024

On August 19, 2024, the Province released the PPS, 2024, which replaces the PPS, 2020 and a Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 as an integrated document. It is important to note that the PPS, 2024 has been in effect since October 20, 2024.

A key focus of the PPS, 2024 is that it recognizes that the approach to delivering housing and accommodating non-residential development will vary by municipality and, as such, moves away from a prescriptive guideline-based approach. The following summarizes key highlights of the PPS, 2024.

Planning for Growth

- Compared to the PPS, 2020, the PPS, 2024 presents a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Additionally, it allows for the planning of infrastructure, public service facilities, strategic growth areas, and Employment



Areas to extend beyond this time horizon.^[1] As such, this suggests that municipalities are to designate land to accommodate growth for at least 20 years, but not more than 30 years with the opportunity to designate additional land beyond the 30-year time horizon for Employment Areas, strategic growth areas, and planning for infrastructure.^[2]

- The PPS, 2024 requires municipalities to consider population and employment growth forecasts prepared using the Ministry of Finance’s (MOF) projections and allows municipalities to modify these forecasts as appropriate.^[3] The use of the MOF forecasts is not meant to replace long-term forecasting by municipalities, but the forecasts are to be used as a starting place in establishing forecasts and testing the reasonableness of alternative regional forecasts and area municipal growth allocations. This approach was carried out for this study.
- According to the PPS, 2024, Minister’s Zoning Orders (MZOs) are to be treated as “in addition to projected needs” over the planning horizon. In planning for MZO lands, the PPS, 2024 states that these lands must be incorporated into the OP and related infrastructure plans.^[4]
- Since MZO lands are not tied to an assessment of need, it is understood that when planning for these lands the timing of their buildout is not held to a targeted minimum or maximum planning horizon. As such, it is recognized that the full development of MZOs may or may not extend beyond the 30-year maximum planning horizon set out in the proposed PPS, 2024, subject to anticipated economic growth and real estate market demand within the municipality and the broader economic region over the horizon of the plan. In view of this, it is recommended that the timing of development regarding approved MZOs should be established through provincial and local phasing policies, municipal servicing plans, and reviewed through regular monitoring.
- The PPS, 2024 introduces the concept of “large and fast-growing municipalities,” which are listed in Schedule 1 of the PPS, 2024. These municipalities are encouraged to plan for a target of 50 residents and jobs per gross hectare (ha) in designated growth areas.^[5] This density target represents a minimum, and

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

[2] Ibid.

[3] Ibid.

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

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



municipalities are encouraged to go beyond these minimum targets, where appropriate.^[6] Furthermore, large and fast-growing municipalities are to consider watershed planning in planning for storm, sewage and water servicing.^[7] No municipalities within Lanark County are included in the “large and fast-growing” classification from the Province.

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

Planning for Housing

- Generally unchanged from the PPS, 2020, the PPS, 2024 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands that are designated and available for residential development within the regional market area.^[8] It is noted, however, that the emphasis on intensification and redevelopment in this regard has been removed. Planning authorities are also required to maintain at all times, where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans within the regional market area.^[9]

^[6] Ibid., policy 6.1.13, p. 33.

^[7] Provincial Planning Statement, 2024, policy 4.2, p. 22.

^[8] Ibid., policy 2.1.4, p. 6.

^[9] According to the PPS, 2024, upper or single-tier municipality, or planning area, will normally serve as the regional market area.



- The PPS, 2024 requires municipalities to establish and maintain minimum targets for intensification and redevelopment within built-up areas, based on local conditions.^[10] Furthermore, municipalities are required to keep their zoning by-laws up to date by establishing minimum densities, heights, and other standards to accommodate growth and development.^[11]

Settlement Area Boundary Expansions

- According to the PPS, 2024, a Settlement Area boundary expansion (SABE) is allowed at any time and without the requirement of a Comprehensive Review (C.R), provided that the SABE meets the criteria established in policy 2.3.2.1. The criteria include establishing the need to designate and plan for additional land to meet an appropriate range and mix of land uses, supported by infrastructure and public facilities while limiting the impact on agricultural areas. Furthermore, the SABE is to support a phased progression of urban development. Overall, the policies allow for a simplified and flexible approach for municipalities to undertake a SABE^[12]

Planning for Employment

- Unchanged from the PPS, 2020, major office and major institutional development should be directed to major transit station areas or other strategic growth areas where frequent transit service is available, according to the PPS, 2024.^[13]
- The PPS, 2024 includes an updated definition of Employment Area based on the amendment of the *Planning Act* on June 8, 2023. The *Planning Act* was amended under subsection 1 (1) to include a new definition of “area of employment.” This definition of Employment Area has been scoped to include only industrial-type employment as a primary use. The amendment to the *Planning Act* received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the *Planning Act* came into effect on October 20, 2024, in concert with the PPS, 2024.

^[10] Provincial Planning Statement, 2024, policy 2.3.1.4, p. 8.

^[11] Provincial Planning Statement, 2024, policy 6.1.6, p. 32.

^[12] Ibid., policy 2.3.2, p. 9.

^[13] Ibid., policy 2.8.1.4, p. 13.



- According to the PPS, 2024, municipalities are to assess and update Employment Areas identified in OPs to ensure that this designation is appropriate to the planned function of Employment Areas.^[14]
- The PPS, 2024 requires that municipalities designate, protect, and plan for all Employment Areas in Settlement Areas by:
 - planning for the long-term needs of Employment Area uses;
 - prohibiting residential uses, commercial uses, public service facilities, other institutional uses, and retail and office uses not associated with the primary employment use; and
 - providing an appropriate transition to adjacent non-Employment Areas to ensure land use compatibility and economic viability.^[15]
- Under the PPS, 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Previously, under the PPS, 2020 and the Growth Plan, municipalities were required to review changes to designated Employment Areas during a Municipal Comprehensive Review (MCR) or Comprehensive Review (CR). Under the PPS, 2024, municipalities are required to demonstrate that there is an identified need for the removal and that the land is not required for Employment Area uses over the long term. Furthermore, municipalities need to demonstrate that the proposed change from Employment Area to a non-Employment Area use does not undermine the overall viability of the Employment Area.^[16]
- While the PPS, 2024 requires an appropriate separation between Employment Area uses and sensitive uses, it also provides the opportunity for manufacturing, small-scale warehousing, and other industrial uses to be accommodated outside of Employment Areas where there are no adverse effects to being located near a sensitive use. It notes that, if there is an opportunity, these uses are to be encouraged in strategic growth areas and other mixed-use areas where frequent transit service is available.^[17]

[14] Provincial Planning Statement, 2024, policy 2.8.2.4, p. 14.

[15] Provincial Planning Statement, 2024, policy 2.8.2.3, p. 14.

[16] Ibid., policy 2.8.2.5, p. 15.

[17] Provincial Planning Statement, 2024, policy 2.8.1.2, p. 13.



Planning for Growth in Rural Areas

- Generally unchanged from the PPS, 2020, the PPS, 2024 indicates that rural Settlement Areas shall be the focus of growth and development and their vitality and regeneration shall be promoted.^[18] Furthermore, when directing development in rural Settlement Areas, municipalities are to give consideration to locally appropriate rural characteristics, the scale of the development, and the provision of appropriate service levels.^[19]
- In prime agricultural areas, permitted uses and activities include agricultural uses, agriculture-related uses, and on-farm diversified uses based on provincial guidance, according to the PPS, 2024.^[20] Compared to the PPS, 2020, this policy has been modified in the PPS, 2024 and adds provincial guidance.

As previously noted, the PPS, 2024 came into effect on October 20, 2024. The technical analysis conducted as a part of this study was primarily done under the guidance of the previous PPS 2020. On review of the 2024 PPS policies, it is our opinion that the technical analysis carried out as part of this GMS is consistent with the 2024 PPS

1.3 Lanark County Official Plan

In its vision statement, the Lanark County SCOP strives to strengthen and diversify the economy, effectively manage growth, protect the environment, preserve heritage, and maintain its unique character. The SCOP is intended to provide broad policy context while relying on local Official Plans for the implementation of its plan policies. Some of the policies most relevant to this GMS exercise are discussed briefly below.

Population projections and forecasts by local municipality are discussed in Section 1.1 and Appendix 2 of the SCOP. According to the current SCOP, the County is expected to experience a growth rate of 3% per year between 2016 to 2038, reaching a population of 96,400 by 2038. This growth forecast by area municipality is reassessed herein.

Settlement Area land use policies are included in Section 2.6 of the SCOP and subsection 2.6.2.1 specifically states that Settlement Areas shall be defined through

^[18] Ibid., policy 2.5.2, p. 11.

^[19] Ibid., policy 2.5.3, p. 11.

^[20] Ibid., policy 4.3.2, p. 23.



local OPs and municipal zoning by-laws. The SCOP focuses on maintaining an adequate supply of residential lands, providing a range of housing types, ensuring the provision of adequate facilities and municipal services and developing mixed-use communities.

According to Section 2.4 of the SCOP, consideration for expanding a Settlement Area boundary to increase development potential would be done through a CR. A CR would include demographic projections, analysis of growth options including increased intensification, servicing studies, and compliance with Minimum Distance Separation (MDS) formula. As mentioned in Section 1.2, the concept of CR has been removed from the 2024 PPS planning policies, giving municipalities more control over the process. However, planning authorities are still required to assess the need to designate and plan for additional lands to support an appropriate range and mix of uses.

Housing is also a central consideration within the current SCOP Section 8.2.9 of the SCOP provides guidelines for implementation for providing a range of housing in the County. This entails the following:

- Monitoring the need for socially assisted housing for households and seniors through periodic surveys in cooperation with area municipalities.
- Encouraging infill and housing intensification, particularly in urban core areas.
- Ensuring a minimum 10-year supply of residential land at all times (see Chapter 6 for updated policy recommendations in this regard).
- Working with the development industry to ensure that a three-year minimum supply of registered or draft-approved lots and blocks for new residential development is available at all times.
- Monitoring population projections and the residential development targets of the SCOP
- Encouraging cost-effective development standards and densities for new residential development to reduce the cost of housing.

The analysis conducted herein functions within the context of the Lanark County SCOP and Chapter 6 provides high-level policy recommendations for incorporating the technical findings of this study into the SCOP



Chapter 2

Overview of the Macro- Economic Outlook and Growth Trends



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

This chapter summarizes the global, national, provincial, and regional economic trends that are anticipated to continue to influence the population and employment growth outlook for Ontario and Lanark County over the next three decades.

2.1 Global Economic Trends

In its latest World Economic Outlook, the International Monetary Fund (IMF) is forecasting global economic growth will remain relatively stable from 3.3% in 2023 to 3.2% in 2024 and 2025. For advanced economies, the projected economic growth of 1.8% in 2024 is slightly higher than the IMF's forecast of 1.5% from its January 2024 projections. Looking forward, the outlook has slightly improved from IMF's January 2024 projections, with forecast growth of 1.8% in 2024 and 1.8% in 2025. Forecast economic growth for advanced economies, however, is a little over half what was achieved in 2022, with 90% of advanced economies projected to experience a sharp slowdown due to higher unemployment. Growth prospects for emerging markets and developing economies are much more varied, but overall have strengthened from the IMF's January 2024 outlook and are noticeably stronger relative to advanced economies with economic growth projections of 4.2% in 2024 and in 2025.^[21]

Within the United States (U.S.), real gross domestic product (GDP) grew by 2.9% in 2023; and in 2024 U.S. economic growth is projected to remain relatively stable at 2.8% before decreasing to 2.2% in 2025. This outlook is due to several factors, including high household debt, high interest rates, a tightening in financial conditions, and a slowdown in global trade. These trends in global economic conditions are important to monitor, particularly in the U.S., as they have a direct influence on macro-economic conditions in Canada.

^[21] International Monetary Fund, World Economic Outlook, October 2024: Policy Pivot Rising Threats.



2.2 Evolving Macro-Economic Trends Following COVID-19

Since COVID-19 was declared a pandemic on March 12, 2020, its economic effects have been substantial. Employment sectors including travel, tourism, hospitality, manufacturing, and energy were hit relatively hard by social distancing. In contrast, knowledge-based sectors adapted well to remote and hybrid work, often thriving. Changes in social behaviour, including physical distancing, and increased remote work have led to ongoing economic disruptions, particularly in how work is done. Additionally, rising trade tensions and geopolitical unrest continue to highlight vulnerabilities in globalization and supply chains, which were severely disrupted during the peak of the pandemic.

Following a sharp national economic recovery in 2020 due to COVID-19 policy measures, federal economic support, fiscal stimulus, and vaccine rollouts, the Canadian economy experienced significant economic growth in 2021 and 2022. Despite this recovery, there are growing macroeconomic headwinds and increased volatility influencing the economy at national, provincial, and regional levels. Persistently high global and national inflation levels following the pandemic required an aggressive response by central banks, leading to sharp increases in interest rates and quantitative tightening measures.^[22] As of October 2024, both the Bank of Canada and the U.S. Federal Reserve have begun reducing interest rates in response to declining inflation rates and slowing economic growth. The Bank of Canada (BOC) has cut its policy rate multiple times this year, reducing it to 3.75% as of October 2024. Similarly, the US Federal Reserve has also implemented interest rate cuts to support economic growth. As of September 2024, Canada's inflation rate was at 1.6%, down from its peak of 8.1% in June 2022.

While most recent trends in inflation and interest rates are favourable to Canadian residents, businesses and investors, their effects often lag and vary considerably. Furthermore, when considering these more favourable recent conditions, wage and earnings growth have not kept with the pace of rising costs for goods and services over the past several years, with housing and food costs representing key stressors for most Canadian families. It is also important to recognize that ongoing trade disruptions,

^[22] Quantitative tightening is a process whereby a central bank reduces the supply of money circulating in the economy by selling financial assets, mainly government bonds.



geopolitical conflicts, U.S. protectionist policies, and relatively tight labour conditions in some sectors continue to exacerbate global supply shortages for certain goods and services and continue to potentially limit the effectiveness of monetary policy in both easing and controlling inflationary pressures.

As of 2024, rising public sector and household debt in Canada remains a key economic concern, largely due to pandemic response measures, alongside increasing household debt levels, largely driven by significant housing price appreciation in Canada's major urban centers. Since peaking in February 2022, the national housing market has shown signs of cooling, with notable declines in both sales and price growth in recent years. However, it is noted that trends vary widely by region and housing affordability (both ownership and rental) has been steadily eroded for the past decade across most Canadian regions. It is yet to be seen what impact the continued interest rate reductions by the BOC will have on the housing market and inflation as a whole.

While these immediate concerns highlight potential setbacks to the Country's economic recovery, the longer-term outlook for Canada's economy and housing market remains positive. Continued investments in infrastructure and technology, along with a resilient labour market, are anticipated to drive national economic growth. Policymakers will need to navigate these complexities carefully to foster stability and support recovery in the coming years.

2.2.1 COVID-19 and the Changing Nature of Work

In addition to its broader impacts on the economy, COVID-19 is also accelerating changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. Businesses are increasingly required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies, such as virtual private networks, virtual meetings, cloud technology, artificial intelligence and other remote work collaboration tools. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional, and industrial real estate space needs.

As of 2016, it was estimated that approximately 14% of the County's workforce was working from home on a full-time basis. This estimate increased slightly to 16% in 2024, excluding hybrid workers, who are captured as residents with a usual place of



work. From a municipal planning and urban development perspective, it is important to consider the impact of hybrid workers when assessing non-residential space needs, particularly in the office sector.

In addition to work-at-home employment, there are workers within the County who have no fixed place of work (NFPOW).^[23] The percentage of workers within the County who reported NFPOW was approximately 19% in 2016 and is estimated to remain relatively stable in 2024.^[24]

It is anticipated that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will increase slightly over the long term, driven by continued growth in knowledge-based employment sectors and technological advancement.

2.3 Canadian Immigration Targets

During the recovery period from COVID-19, immigration targets were raised in Canada primarily in response to labour force demands faced by Canadian businesses. Immigration accounts for almost 100% of Canada's labour force growth and nearly 80% of its population growth. As a result of the increased targets, Canada welcomed 471,800 and 485,000 new permanent residents in 2023 and 2024, respectively.

In October 2024, the federal government reduced the previous immigration targets by about 21%. The federal government has also announced that it will reduce the percentage of non-permanent residents (NPR) from 7.3% of the national population to 5.0% by the end of 2026.^[25] ^[26] These changes address the changing needs of the country to ease pressures on housing, infrastructure, and social services. Figure 2-1

^[23] Statistics Canada defines N.F.P.O.W. employees as “persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”

^[24] Work at home and N.F.P.O.W. employment derived from 2016 and 2021 Statistics Canada Census data. It is noted that the 2021 Census data may not be reliable due to timing of enumeration coinciding with COVID-19.

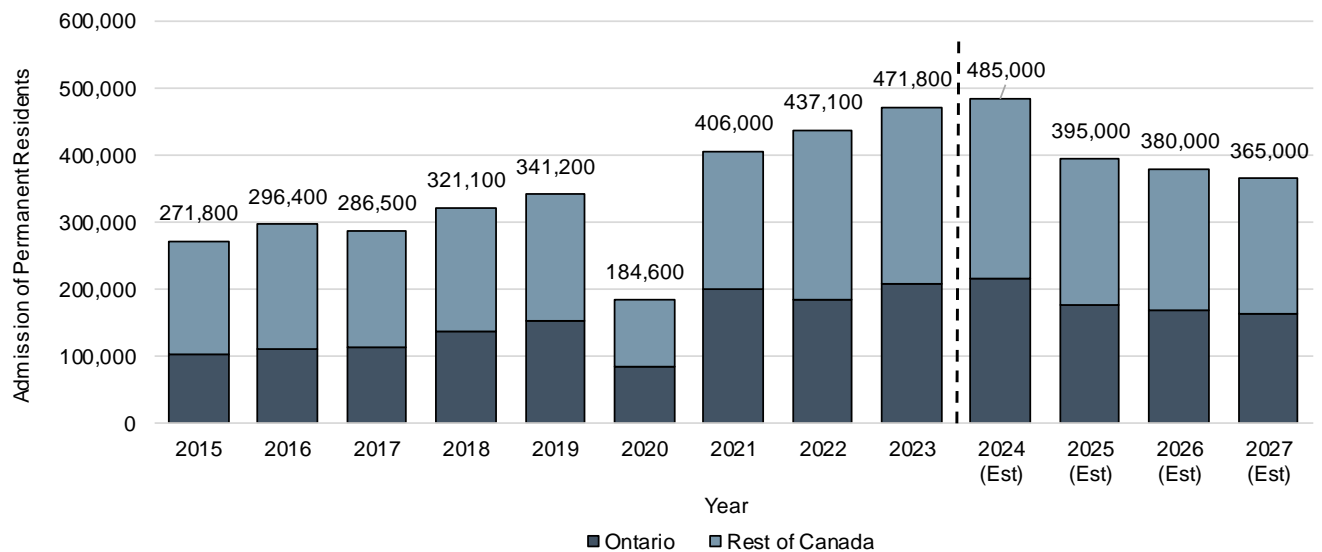
^[25] NPR share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 NPR out of 41,288,599 residents in Canada.

^[26] NPR national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.



shows annual admissions to Canada and Ontario since 2015. In 2020, national and provincial immigration levels sharply declined due to COVID-19. Immigration in 2021 rebounded strongly, resulting in 405,000 permanent residents admitted to Canada in 2021, roughly half of which were accommodated in the Province of Ontario that year. Based on 2024 data and looking forward through 2025 and beyond, despite the target reductions noted above, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

Figure 2-1
Admission of Permanent Residents in Ontario and Canada
Historical (2015 to 2023) and Forecast (2024 to 2027)



Source: 2015 to 2023 derived from Immigration, Refugees, and Citizenship Canada (I.R.C.C.) April 30, 2024 data. 2024 to 2027 federal targets from Government of Canada's Immigration Levels Plan for 2024 to 2026 and 2025 to 2027, and Ontario target estimated based on historical share of about 45% of the Canadian Permanent Residents Admissions from 2018 to 2023, by Watson & Associates Economists Ltd.



2.4 Planning within the Context of an Evolving National and Provincial Economy

2.4.1 Ontario Population Growth Outlook within the Canadian Context

Canada's population is experiencing significant growth. During 2023, the population increased by 3.2%, adding 1,271,000 individuals. With population growth outpacing output GDP growth, the GDP per capita has trended lower and is now well below pre-pandemic levels.^[27] The challenges facing growth in the GDP per capita in Canada include labour productivity and a rising unemployment rate for recent immigrants which increased from 9.5% to 12.6% over the past five years.^[28]

The most recent 2024 MOF projection has decreased the growth outlook for Ontario to 20.9 million by 2046, largely driven by the recent federal government announcement to reduce the percentage of non-permanent residents (NPR) from 7.3% of the national population to 5.0%, as previously noted.^[29]^[30] Since the release of the 2024 MOF projections, the federal government announced an additional reduction in the number of new permanent residents it will accept, lowering the 2025 and 2026 targets of 500,000 to 395,000 in 2025, 380,000 in 2026, and 365,000 in 2027. These changes are anticipated to have a further downward impact on future population growth in Canada, including Ontario (refer to Section 3.3.2).^[31]

When examining forecast immigration levels required over the long term to achieve the 2024 MOF projections for Ontario, these revised projections appear slightly ambitious.

^[27] Statistics Canada, Economic and Social Reports, *Canada's Gross Domestic Product Per Capita Perspectives on the Return to the Trend* report by Carter McCormack and Weimin Wang, April 24, 2024.

^[28] TD Economic Reports, Canadian Employment (July 2024), *Canada's job market softens further in July*, published August 9, 2024.

^[29] NPR share as of Q3 2024 derived from Statistics Canada Tables 17-10-0009-01 and 17-10-0121-01. There are 3,002,090 NPR out of 41,288,599 residents.

^[30] NPR national population target of 5% from the Government of Canada 2025-2027 Immigration Levels Plan.

^[31] Government of Canada News Release, October 24, 2024.

<https://www.canada.ca/en/immigration-refugees-citizenship/news/2024/10/government-of-canada-reduces-immigration.html>



The 2024 MOF population forecast continues to project a higher long-term population growth rate for the Province compared to historical trends experienced over the past 20 years, with an annual growth rate of 1.3% between 2021 and 2051. This translates into an annual population increase of 242,600 people. Comparatively, the level of annual population growth forecast for Ontario under the 2023 MOF is higher with an annual population growth of 274,000 and a growth rate of 1.6% over the 2021 and 2046 period.

2.4.2 National and Provincial Gross Domestic Product Trends and Near-Term Forecast

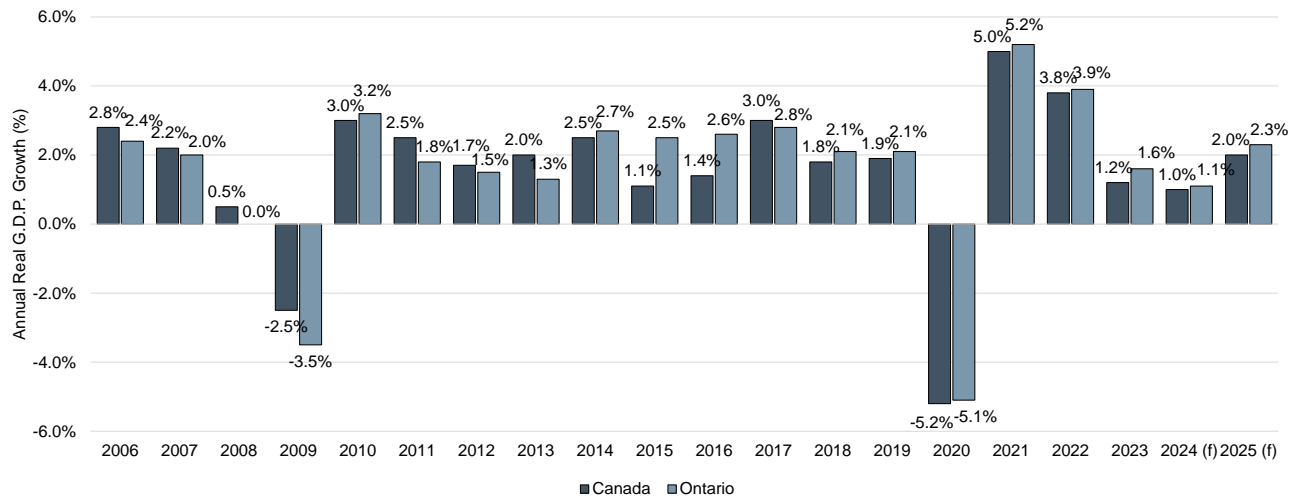
Similar to the broader Canadian economy, the economic base of Ontario, as measured by GDP output, has shifted from the goods-producing sector (i.e., manufacturing and primary resources) to the services-producing sector over the past several decades. This shift has largely been driven by GDP declines in the manufacturing sector which were accelerated prior to and following the 2008/2009 global economic downturn. It is noted, however, that these GDP declines in the manufacturing sector have started to show signs of stabilization, both prior to the coronavirus disease (COVID-19) pandemic and through the more recent economic recovery.

As illustrated in Figure 2-2, the Ontario economy contracted by 5.1% in 2020 before rebounding by 4.6% in 2021. BMO Capital Markets has forecast that the Ontario economy will continue to soften over 2024, growing by 1.0%, while the overall Canadian economy is expected to strengthen to an average annual GDP rate of 2.0% in 2025. Economic growth in Ontario is forecast to increase at a slightly higher rate than the overall Canadian economy.^[32]

^[32] BMO Capital Markets Economics, Provincial Economic Outlook, June 7, 2024.



Figure 2-2
Province of Ontario and Canada
Annual Real Gross Domestic Product (GDP) Growth, Historical (2006 to 2023),
and Forecast (2024 to 2025)



Note: 2021 (Ontario), 2024, and 2025 are forecast by BMO Capital Markets Economics.

Source: Derived from BMO Capital Markets Economics, Provincial Economic Outlook, June 7, 2024, by Watson & Associates Economists Ltd.

2.5 Regional and Local Labour Force Trends

2.5.1 Broader Regional Economic Outlook, 2001 to 2023

Figure 2-3 illustrates the total labour force and unemployment rate trends for the Ottawa Economic Region alongside the unemployment rate in Ontario.^[33] Labour force data represents the number of residents who live in the Ottawa Economic Region and are part of the labour force, regardless of where they work. This includes residents who live and work in the region, those who work from home, and those who commute outside the region for work. Key observations include:

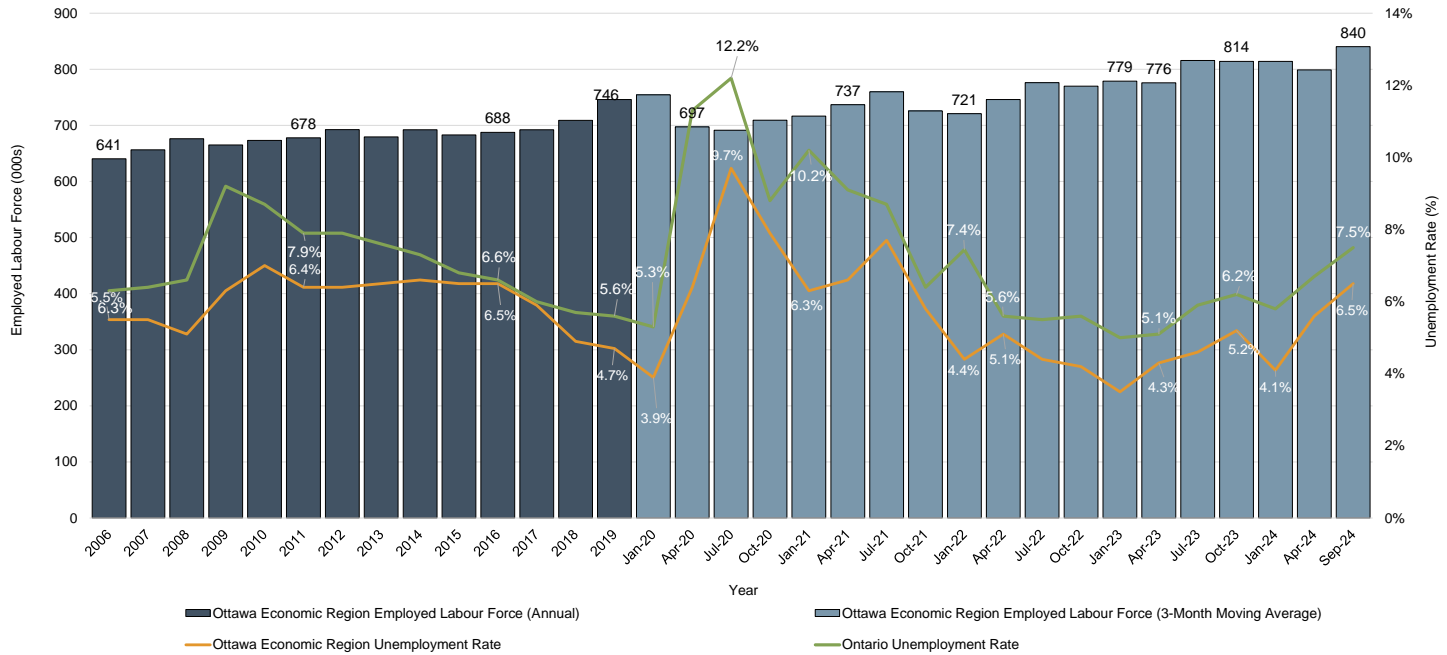
^[33] Based on the levels of geography for which the data on labour force and employment rate trends is maintained, Economic Region level data is the closest regional data available for the Lanark County.



- The employed labour force in the Ottawa Economic Region grew from 641,000 in 2006 to 746,000 by 2019 but thereafter dropped to 691,000 in July 2020 due to restrictions resulting from COVID-19.
- In the Ottawa Economic Region, the unemployment rate rose to 6.3% in 2009 due to the 2008 recession, fell to 4.7% in 2019, and peaked at 9.7% in July 2020 due to COVID-19. It was lower than the provincial average during these times; and
- Since mid-2020, the unemployment rate has declined, reaching 4.1% in January 2024, but has been gradually increasing since then.
- While labour force growth has been steadily increasing since COVID-19, signs of a rising unemployment rate and broader economic concerns may constrain future labour force growth. To ensure that economic growth is not constrained by future labour shortages, continued effort will be required by Lanark County and its local municipalities to continue to explore ways to attract and accommodate new skilled and unskilled working residents to the region within a broad range of housing options.



Figure 2-3
Ottawa Economic Region
Total Labour Force and Unemployment Rate Trends, 2001 to 2022



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
 Source: Statistics Canada Data Tables 14-10-0090-01, 14-10-0393-01, 14-10-0387-01, and 14-10-0327-01. By Watson & Associates Economists Ltd.

Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
 Source: Ottawa Economic Region employed labour force from Statistics Canada Table 14-10-0096-01.
 Province of Ontario unemployment rate from Statistics Canada Table 14-10-0090-01, by Watson & Associates Economists Ltd., 2024.

2.6 Outward Population Growth Pressure

Lanark County is situated approximately 30 kilometres west of the city center of Ottawa. This makes the County an attractive area for commuters and those seeking a more rural lifestyle while still having access to the amenities within the City of Ottawa. For Lanark County, outward growth pressure is anticipated to be most heavily felt from the City of Ottawa as well as other urban Settlement Areas in neighbouring municipalities to Lanark County. The County’s access to recreational areas combined with its blend of vibrant urban centres and rural hamlets/villages, also represents a key draw to this area of the Province.



The strength of the broader regional economy presents an opportunity for working-age residents in Lanark County within commuting distance to these steadily growing regional employment markets. Steady economic growth across the broader regional economy also continues to provide synergies and economic development opportunities across a range of employment sectors locally.

Driven by economic growth across the regional and local economy, the Lanark County employment market (i.e., jobs within the commuter shed) has strengthened and diversified in recent years. As previously noted, the COVID-19 pandemic also accelerated changes to the nature of work, allowing for greater opportunities for remote or hybrid work patterns. Continued investments in broadband infrastructure and advancements in technology are anticipated to further enable a growing share of work-at-home/hybrid work jobs across both urban and rural areas throughout the County. The creation of the Eastern Ontario Regional Network has further improved connectivity in the County and the broader region. Collectively, these conditions are providing increased opportunities for working-age residents to live in Lanark County and work locally, or within the surrounding commuter shed, provided that a range of ownership and rental housing options are available.

Accommodating younger generations, such as Millennials and Generation Z, and other working-age adults is a key objective for Lanark County, recognizing that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another.^[34] To ensure that economic growth is not constrained by future labour shortages, continued effort is required by the public sector and their private-sector partners to explore ways to attract and accommodate new skilled and unskilled working-age residents to the region within a diverse range of housing options by structure type, tenure, and location. Labour force attraction efforts must also be linked to housing accommodation (both ownership and rental), infrastructure, municipal services, amenities, as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the region's attractiveness to older population segments.

Housing demand associated with younger generations in the County is anticipated to be strong across a range of housing types that are affordable to new home buyers/renters

^[34] Millennials and Generation Z refer to those born between 1981 and 1996, and 1997 and 2012, respectively.



and cater to a broad range of lifestyle preferences largely towards urban and suburban living. This is particularly relevant for Lanark, as the County can offer more affordably-priced housing options compared to the City of Ottawa, especially when considering ground-oriented dwellings. Demand for low-density housing is anticipated to be strongest for “move-up” home buyers with growing families, typically working-age homeowners approaching 40 years and older.

Forecast demographic trends more broadly across Southern Ontario and nationally suggest that the percentage share of future housing will continue to remain strong in urban areas. Typically, existing and new working-age residents are seeking competitively priced, ground-oriented housing options located within proximity to local urban amenities (i.e., schools, retail, personal service uses, etc.) with good access to surrounding employment markets. Housing demands from the 55-74 age group (empty nesters/young seniors) and the 75+ age group (older seniors) are also anticipated to drive the future need for housing within proximity to urban amenities (i.e., shopping, entertainment, hospitals/health care) and other community infrastructure.

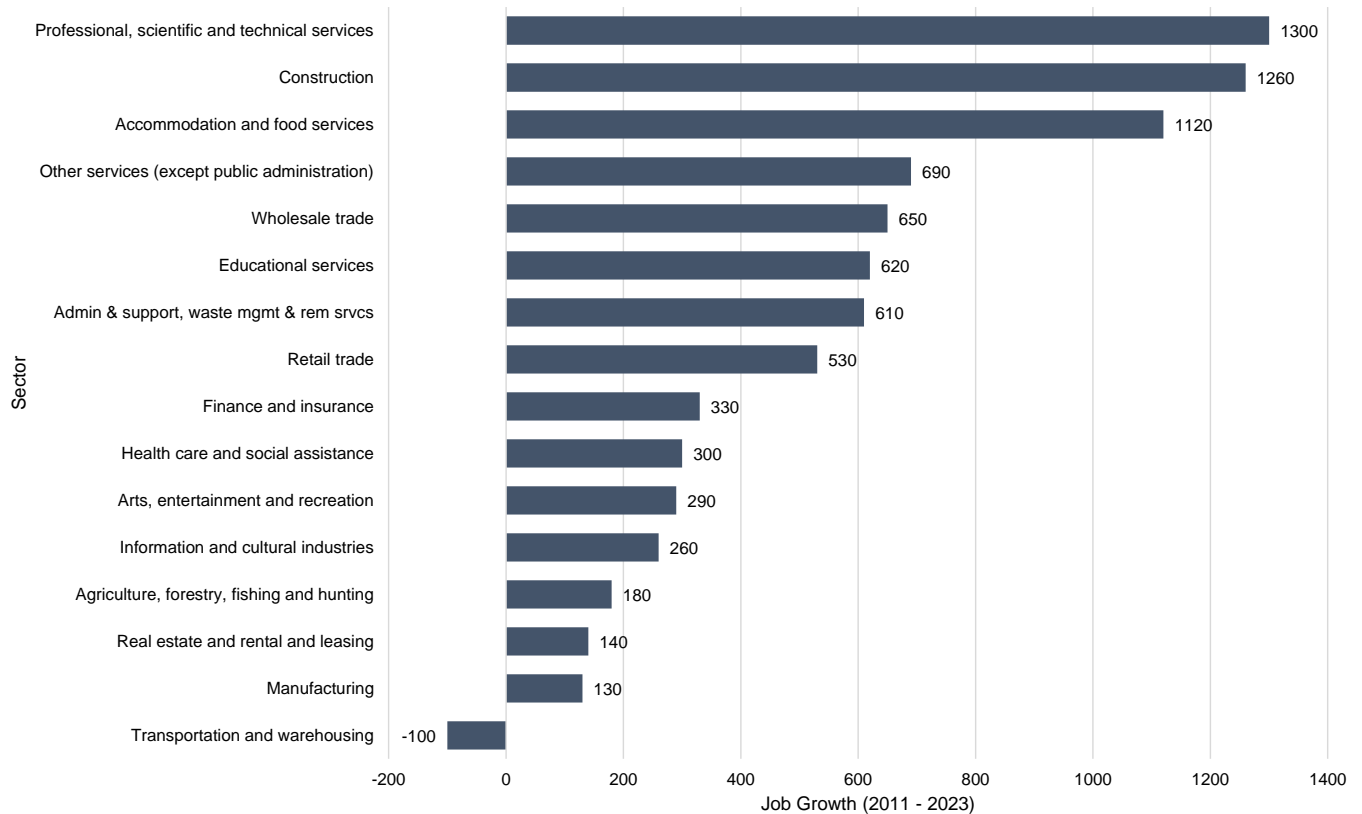
2.7 Overview of Lanark County Growth Trends

2.7.1 Recent Employment Growth Trends by Sector

Over the 2011 to 2023 time period, Lanark County has experienced positive employment growth in almost all major sectors of employment. The highest employment growth has occurred in service-based industries, including: professional, scientific and technical services, accommodation and food services, other services (refer to Figure 2-3). Industrial sectors like construction and wholesale trade have also seen significant growth over the 2011 to 2023 period. However, employment growth in manufacturing and transportation and warehousing has been limited.



Figure 2-3
Lanark County
Employment Growth by Industry, 2011 to 2023



Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2024.

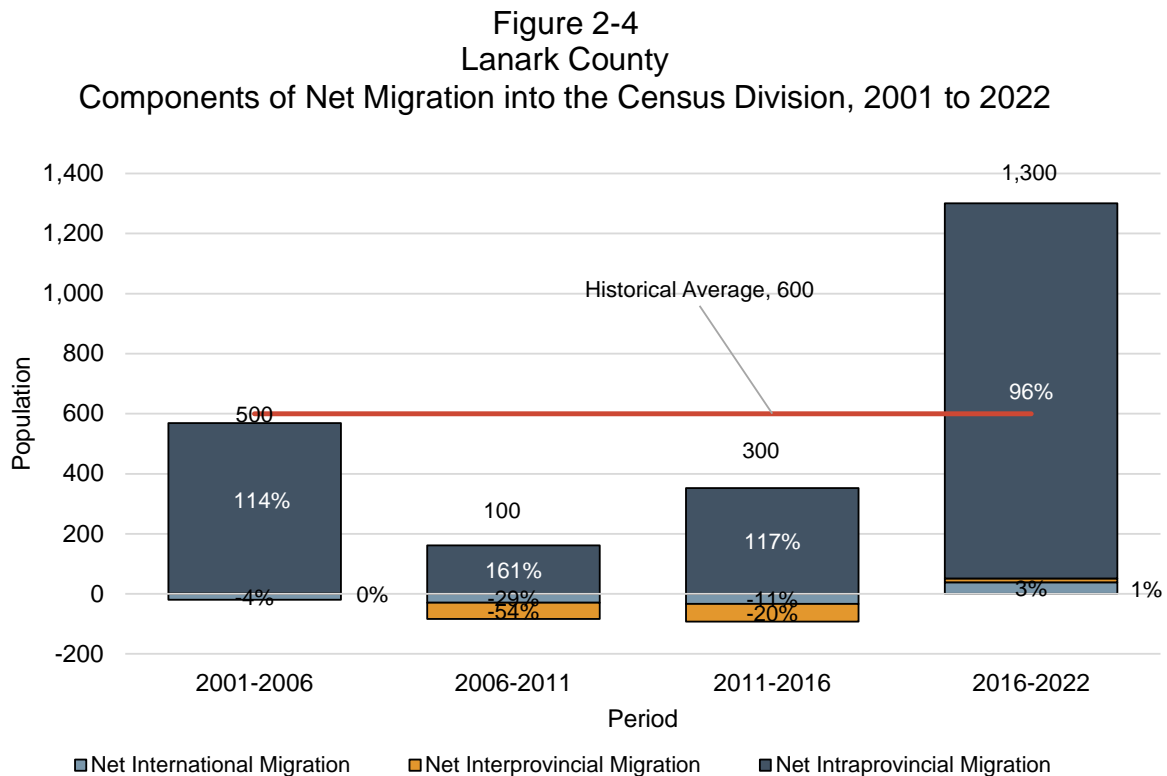
2.7.2 Lanark County Census Division Migration Trends

Migration can typically take three main forms: international migration (from one Country to another); inter-provincial migration (from one province to another); and intra-provincial migration (within the same province). Between 2006 and 2016, inter-provincial migration and international migration in the Lanark County Census Division were negative, meaning more people moved out of the Census Division than moved in from other countries or provinces. However, from 2016 to 2022, the County experienced a small amount of net international and interprovincial migration.

Most importantly for Lanark County, as seen in Figure 2-4, nearly all population growth in the County was achieved through intra-provincial migration, with people moving from other areas in Ontario to Lanark County. Looking forward, it is assumed that intra-



provincial migration will account for nearly all migration into Lanark County over the forecast period.



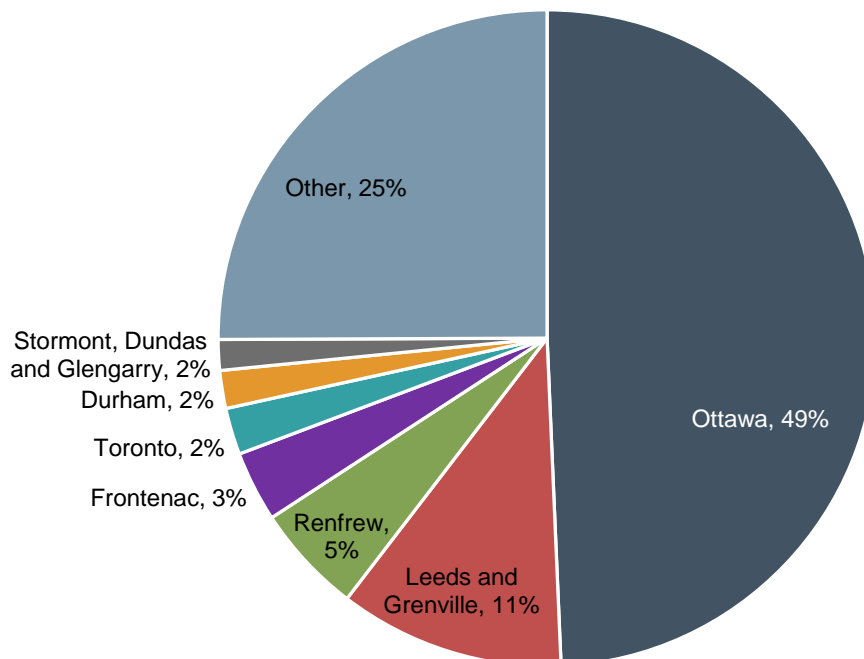
Note: Figures have been rounded. Figures are not adjusted for the residual deviation.
Source: Statistics Canada Table 17-10-0140-01, Components of Population Change by Census Division, 2016 boundaries, by Watson & Associates Economists Ltd.

Given the importance of intra-provincial migration to Lanark County's growth potential, Figure 2-5 summarizes intra-provincial migration flows into the Lanark County Census Division during the 2015 to 2021 period.^[35] For the Lanark County Census Division, this outward growth pressure has been most heavily felt from the City of Ottawa with just under half of all intra-provincial migration, followed by Leeds and Grenville (11%), and Renfrew County (5%).

^[35] Intra-provincial migration represents individuals migrating from a Census Division within Ontario to another Census Division within Ontario.



Figure 2-5
Lanark County Census Division
Historical Migration Flows into the Census Division, 2015 to 2021



Source: Statistics Canada Custom Order Data, Derived by Watson & Associates Economists Ltd., 2023.

2.7.3 Permanent Building Permit Activity

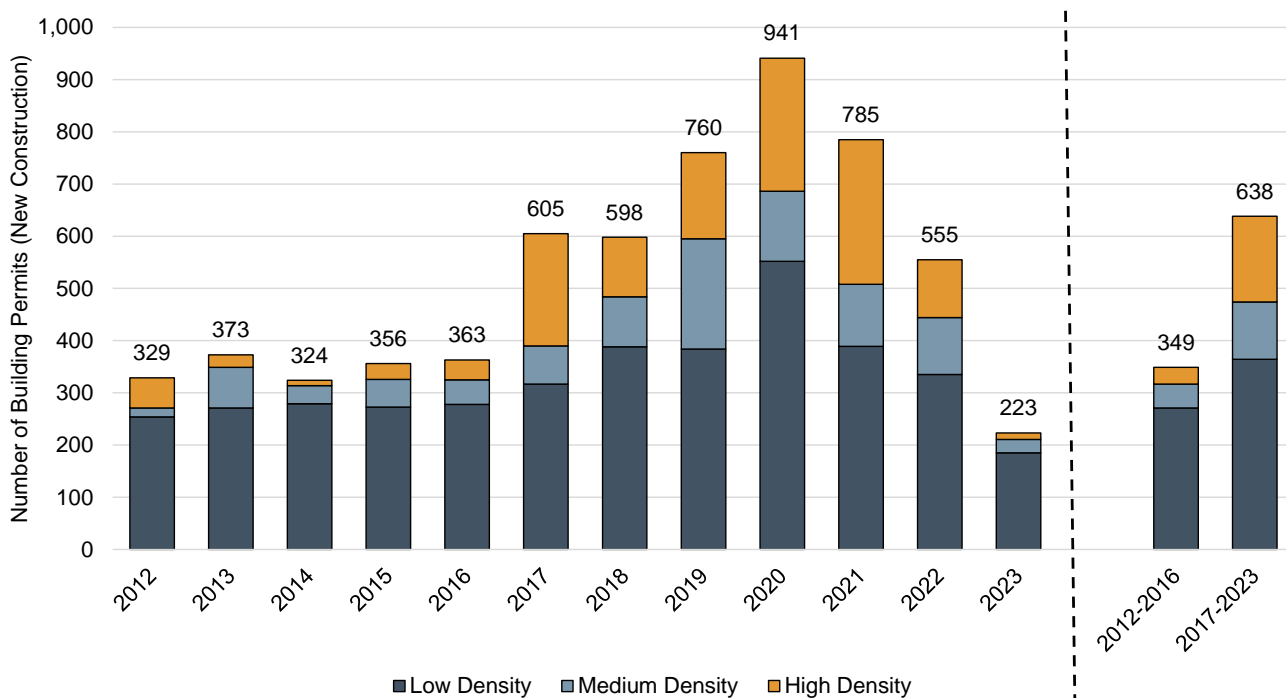
Figure 2-6 summarizes total building permits by structure type issued in Lanark County from 2013 to 2023 and Figure 2-7 displays the share of residential building permits by area municipality for new housing units between 2021 and 2023. Key findings include the following:

- Over the 2012 to 2016 period, the County averaged 349 residential building permits per year, increasing to 638 permits per year between 2017 and 2023;
- Building permit activity peaked in 2020 and has since been on a steady decline back to levels witnessed before 2017. As inflationary pressures and interest rates decline, it is anticipated that building activity will rebound in both the Province and Lanark County. However, it is important to note that lower interest rates are likely to have a limited impact on improving housing affordability, as lower borrowing costs are anticipated to be offset by rising housing prices.



- Historically, development activity has been largely dominated by low-density units; however, the share of building permits for medium- and high-density housing has particularly increased since 2017; and
- Of the total building permits issued more recently (from 2021 to 2023) for new dwellings, more than half were issued in the municipalities of Carleton Place and Mississippi Mills.

Figure 2-6
Lanark County
Historical Residential Building Permits (New Dwellings Only), 2012 to 2023



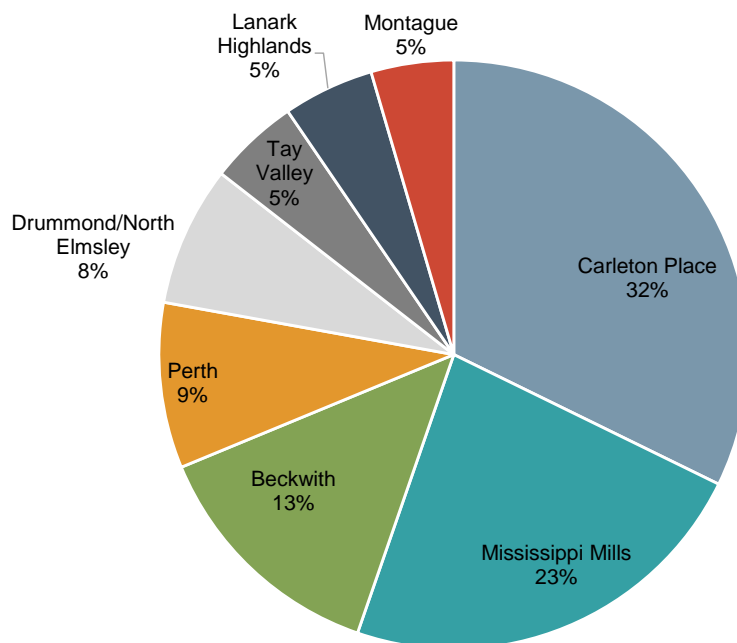
Notes:

- Medium density includes townhouses and apartments in duplexes.
- High density includes accessory apartments, bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: Derived from Statistics Canada building permit data, 2013 to 2023, by Watson & Associates Economists Ltd.



Figure 2-7
Lanark County
Historical Residential Building Permits, 2021 to 2023



Source: Derived from Statistics Canada building permit data, 2021 to 2023, by Watson & Associates Economists Ltd.

2.8 Observations

Over the past several decades, the provincial economy has been steadily shifting away from goods-producing sectors and moving towards services-producing and knowledge-based sectors. As a result of these continued structural changes occurring in the macroeconomy, it is important to recognize that the trends mentioned within this chapter will generate both positive and disruptive economic impacts related to employment growth, local business investment, and labour force demand. These disruptive forces are also anticipated to have long-term impacts on non-residential space requirements, as well as population growth patterns.

Population growth rates have been increasing across the County for close to the past decade following the gradual economic recovery from the 2008/2009 economic downturn, with a more substantial increase between 2016 and 2021. This higher population growth trajectory is anticipated to remain over the long term, notwithstanding



downward economic trends and real estate market trends that have been experienced locally recently.

Since the onset of the pandemic, COVID-19 has acted as a near-term driver of housing demand, led by increased opportunities for remote work or hybrid models. This has led to the reconsideration by some Ontario residents to trade “city lifestyles” for a greater balance of urban and rural living. It is recognized, however, that the longer-term population and employment growth potential for Lanark County will be heavily dependent on the sustained economic growth potential of the broader economic region and the City of Ottawa.



Chapter 3

County-wide Population, Housing and Employment Forecast, 2021 to 2051



3. County-wide Population, Housing and Employment Forecast, 2021 to 2051

3.1 Long-Term Growth in Lanark County

A summary of three long-term population growth forecasts for Lanark County have been provided herein, including Low, Medium and High Growth Scenarios. Each of these long-range population growth scenarios is premised on varying economic and demographic assumptions for the Province, the broader economic region, and the County, which are briefly discussed below. As previously noted, local and regional economic growth potential represents a key driver of net migration associated with working-age adults and their families. Accordingly, the long-term growth scenarios explored herein begin with an examination of the County's long-term population outlook.

3.1.1 *Macro-Economic Conditions*

As previously discussed in subsection 2.2, the COVID-19 pandemic had a significant economic impact on the national and provincial economy in 2020 and 2021. While the initial shock has subsided, its effects continue to shape economic conditions. Since then, Canada has experienced a robust recovery, with the economy outperforming expectations despite higher interest rates. Inflation has decreased from its peak, and the labour market remains strong, with over 1.1 million more Canadians employed today than before the pandemic.^[36]

Recently, the BOC has begun to lower interest rates, with the benchmark rate now at 3.75%.^[37] This decline in interest rates is expected to ease borrowing costs, potentially boosting consumer spending and investment. However, challenges persist, including elevated costs of living, particularly in housing and groceries. These ongoing macroeconomic conditions will continue to impact the strength and outlook of the Ontario economy. Provincial economic trends and broader national conditions will, in turn, influence the County's economy.

^[36] Federal Budget 2024: Economic and Fiscal Overview.

<https://budget.canada.ca/2024/report-rapport/overview-aperçu-en.html>

^[37] <https://www.bankofcanada.ca/core-functions/monetary-policy/key-interest-rate/>



Under the County's Low Population Growth Scenario, it is assumed that the provincial economy will generally underperform relative to the near-term GDP forecasts, as currently set out and updated in subsection 2.3. The Medium and High Growth Scenarios, respectively, assume that the provincial GDP growth will generally meet or exceed current and future provincial near-term GDP forecasts.

3.1.2 National Immigration Trends

Section 2.3 of this report provides a discussion regarding federal immigration targets for Canada and Ontario. Under the Low Population Growth Scenario, it is assumed that national immigration will underperform relative to federal targets over the 2021 to 2051 planning horizon. The Medium Growth Scenario assumes national immigration targets will be met, while the High Growth Scenario assumes that immigration targets will be exceeded. Under each of the long-term growth scenarios, it is assumed that the share of total provincial net migration allocated in the County will increase relative to historical trends over the past 20 years.

3.2 Ministry of Finance Population Projections for Lanark County and the Surrounding Census Divisions

Figure 3-1 presents the long-term population forecast for the Lanark County Census Division in accordance with the MOF (Summer 2020 to the most recent Fall 2024) reference scenario forecasts.^[38] It is noted that this study was undertaken within the context of the MOF 2023 Forecast. The recently released 2024 MOF forecasts have been reviewed and based on our assessment, the appropriateness of the long-term forecast scenarios have been reinforced through this latest MOF release. The following key trends have been identified:

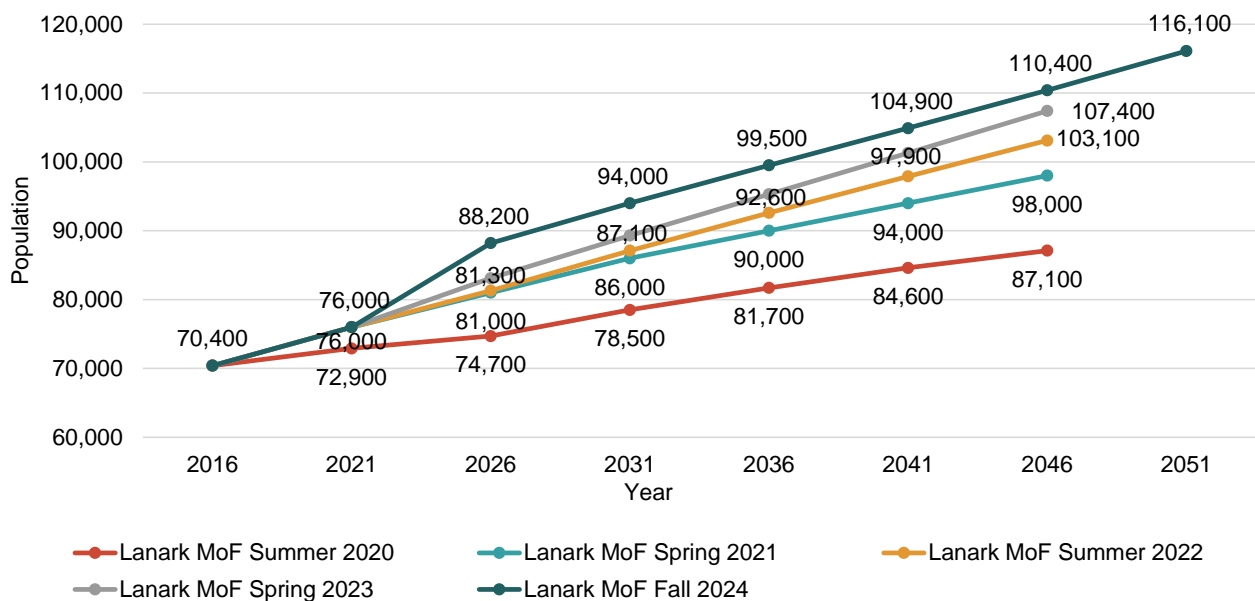
- Between 2020 and 2024, the MOF has continued to increase its growth outlook for the Lanark Census Division.
- According to the 2023 MOF, Lanark County's permanent population is projected to increase from 76,400 in 2021 to 107,400 by 2046, representing an annual population increase of 1.4% between 2021 to 2046, compared to 0.8% between 2001 and 2021.

^[38] Lanark County Census Division includes Smiths Falls.



- Comparatively, the 2023 MOF population projections are higher than the previous MOF population forecasts. In the Fall MOF 2024 update, the growth forecast for the County was increased further to 110,400, representing a minor upward adjustment in the growth outlook.
- Based on historical Census data, the share of the population in the County (excluding Smiths Falls) to the overall Census Division population has increased slightly from 86% in 2006 to 88% in 2021. Assuming a similar trend moving forward, the share of growth will continue to shift slightly toward the rest of the county. Based on this, it is estimated that the MOF 2024 forecast for the County (excluding Smiths Falls) in 2051 is about 104,500.

Figure 3-1
Lanark County (Census Division)
Ministry of Finance Long-Term Population Forecast Comparison, 2021 to 2046



Source: Ministry of Finance projections, presented by Watson & Associates Economists Ltd., 2024.



3.3 Lanark County Long-Term Permanent Population Growth Scenarios, 2021 to 2051

As previously noted, three long-term population growth forecasts for Lanark County have been provided herein, including a Low, Medium and High Growth Scenario. Each of the long-term population growth scenarios represents a varying growth outlook for Lanark County considering current economic trends across the Province and the economic region, as well as the identified long-term population growth drivers for Lanark County, as previously discussed in Chapter 2 and Section 3.1.

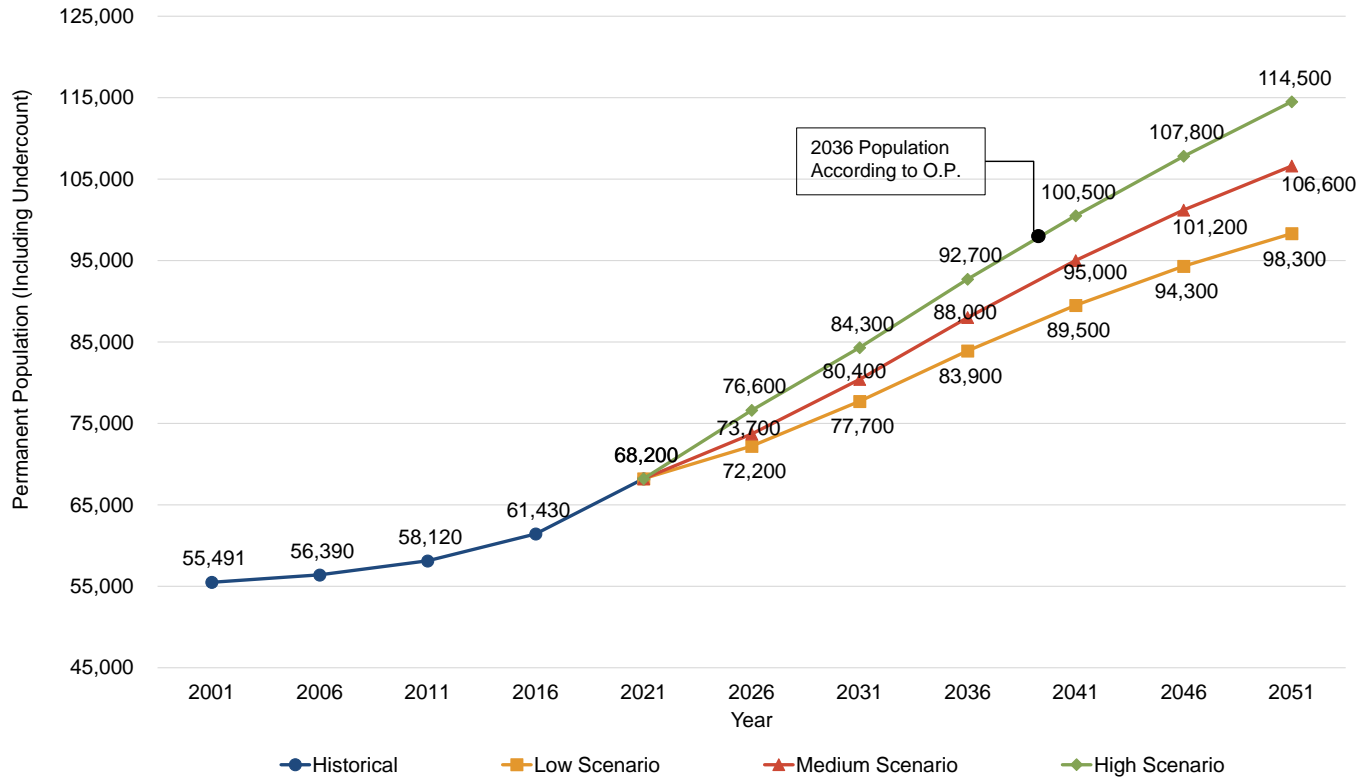
As noted previously, the forecast presented herein has been developed based on an assessment of the MOF 2023 forecast. Over the 2021 to 2051 planning horizon, the Low Growth Scenario assumes a lower rate of growth compared to the 2023 MOF population projections, while the Medium (recommended) and High Growth Scenario reflect a higher growth outlook than that established by the MOF

Figure 3-2 graphically compares the High, Medium (recommended) and Low Population Growth Scenarios for Lanark County. The following can be observed:

- The County's population outlook at 2051 ranges from 98,300 to 114,500 residents.
- The High scenario presented in Figure 3-2 aligns closer to the current OP growth forecast for the County. The current OP estimates a population of approximately 98,900 people (including census undercount) in Lanark County (excluding Smiths Falls). This forecast results in an annual population growth rate of about 2.2% between 2021 to 2038, which is more than double the historical growth rate between 2001 to 2021.
- Each scenario requires varying levels of net migration to offset the aging of the existing population base within Lanark County. Under the Low Scenario, the downward pressure from this aging population is more pronounced. Under the High Scenario, comparatively, increased levels of forecast net migration mitigate the long-term aging of the County's population.



Figure 3-2
Lanark County
Long-Term Population Forecast Scenarios, 2021 to 2051



Growth Scenarios	2021 Population	2051 Population	2021 to 2051 Population Growth	Annual Population Growth	Annual Population Growth Rate
Low Scenario	68,180	98,300	30,120	1,000	1.2%
Medium Scenario	68,180	106,600	38,420	1,280	1.5%
High Scenario	68,180	114,500	46,320	1,540	1.7%

Note: Population includes net Census undercount estimated at 2.5%

Source: 2021 from Statistics Canada Census; forecast by Watson & Associates Economists Ltd., 2022.



Low Population Growth Scenario

Under the Low Growth Scenario, it is assumed that the population base in Lanark County will grow at an average annual rate of 1.2% per year over the forecast period. This results in an incremental population increase of 30,120 persons between 2021 and 2051. Under this scenario, the rate of forecast population growth is anticipated to be higher in the first half of the forecast period and gradually slow during the latter half of the planning horizon. This forecast slowdown in the long-term population growth rate is anticipated as a result of the aging of the County's population resulting in declining population growth through natural increase (births less deaths) over the long term. An aging population also places downward pressure on labour force participation which, in turn, is anticipated to moderate economic growth over the long term.

Medium (Reference) Population Growth Scenario

Under the Medium Growth Scenario, the population within Lanark County is forecast to grow at an annual rate of approximately 1.5% over the forecast period. This represents a higher growth rate compared to that observed by the County between 2001 and 2016, and a slightly lower growth rate than observed over the 2016 to 2021 period (building permit activity since 2021 has declined below these 2016 to 2021 levels). This scenario assumes that the population will increase by approximately 38,400 between 2021 and 2051. Under the Medium Population Growth Scenario, the rate of population growth is also anticipated to gradually slow towards the end of the forecast period.

High Population Growth Scenario

Under the High Growth Scenario, an average annual growth rate of 1.7% is assumed for Lanark County over the 2021 to 2051 forecast period. Accordingly, under this scenario, Lanark County's total population would increase to 114,500 by 2051. This forecast would require a sustained, increasing level of net migration to offset the natural decline of the population by the latter half of the forecast period. Given the recent cuts in immigration targets by the Federal Government (discussed in Section 2.3), it is anticipated that there will be a downward impact on near-term population growth in the Province's larger urban centres (such as the City of Ottawa). This reduced immigration federally has the impact to also reduce the flow of intraprovincial migration flow across the Province, potentially impacting Lanark County.



Preferred Growth Forecast Scenario

Each growth scenario described above is based on a range of assumptions related to population and housing growth. As previously discussed, forecast net migration is largely driven by growth within the local economy and the surrounding commuter shed, as well as the County's attractiveness to residents elsewhere in Ontario. In turn, population growth creates demand for new housing across the County, which is then allocated by area municipality and urban Settlement Areas (refer to Chapter 5).

The population scenarios described in this chapter represent the potential range of future growth which can be anticipated for the County over the next 30 years. Based on our review, the Medium Growth Scenario is the recommended growth forecast scenario for Lanark County for the following reasons:

1. It represents a reasonable future rate of population growth relative to historical trends considering the levels of immigration expected into Canada over the next several decades. The County will continue to attract families and retirees from elsewhere in the Province. It is important that the County continue to focus its efforts on attracting a broad range of working-age population groups to achieve this Medium Growth Scenario.
2. As noted in subsection 3.2., based on MOF 2024, it is estimated that by 2051 the County (excluding Smiths Falls) is forecast to reach a population of 104,500. The Medium Growth Scenario for Lanark County is estimated to be moderately higher at 106,600 people by 2051, representing a slightly increased growth outlook compared to the MOF
3. Additionally, the Medium Growth Scenario assumes that the growth outlook is slightly reduced compared to the growth experienced in the County over the 2016 to 2021 period. This slowdown in the pace of short-term growth reflects caution regarding the current slowdown in economic growth nationally and provincially, potential inflation pressures and challenges regarding the rising cost of living, housing affordability concerns and rising building costs. This is also evident when looking at recent building permit activity. (refer Figure 2-6)
4. The share of net migration and population growth in the 15-64 age group is reasonable given historical patterns.



5. The forecast level of housing growth required to accommodate the Medium Population Growth Scenario represents a considerable increase in housing activity (explored later in this chapter). The growth in the near term (next five to 10 years) is supported by recent building permit activity and current development applications; however, sustaining this level of building activity will present a long-term shift in the County's ability to deliver the necessary infrastructure and soft services to support growth. The High Growth Scenario would require an even higher level of sustained growth, which is ambitious compared to historical trends and the economic uncertainty currently being experienced in the Province over the short term.

Appendix A provides additional information regarding this recommended Medium Population Growth Scenario.

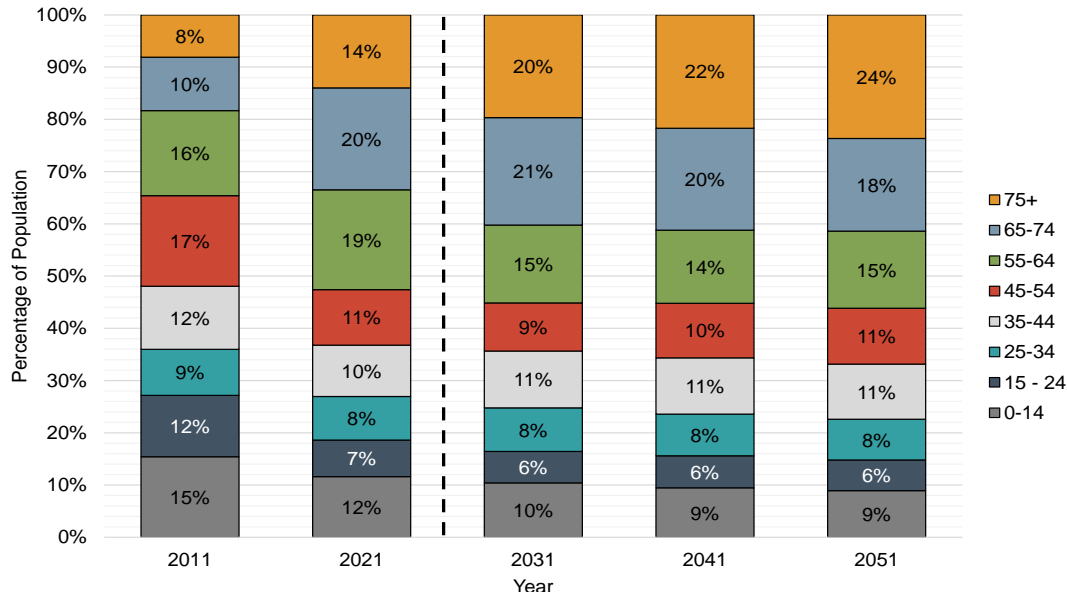
3.3.1 Lanark County Age Structure Forecast, 2021 to 2051

Figure 3-3 summarizes the Reference Population Growth Scenario by major age group over the 2021 to 2051 forecast period for Lanark County. Over the forecast period, the County's population base is expected to steadily age. Most notably, the percentage of the population in the 75+ age group (older seniors) is forecast to increase considerably over the forecast period, from 14% in 2021 to 24% in 2051.

The aging of the population and declining population growth resulting from natural increase (i.e., births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within the County. Similar to the Province as a whole, the County will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions.



Figure 3-3
Lanark County
Population by Age Forecast, 2021 to 2051



Note: Population includes net Census undercount estimated at approximately 2.5%.

Source: 2001 to 2021 from Statistics Canada Census data, 2021 to 2051 population forecast by age prepared by Watson & Associates Economists Ltd., 2024.

3.4 Lanark County Medium Housing Growth Scenario, 2021 to 2051

Figure 3-4 summarizes Lanark County's incremental housing forecast by structure type (i.e., low density, medium density and high density) over the 2021 to 2051 forecast period in five-year growth increments. Key observations include the following:

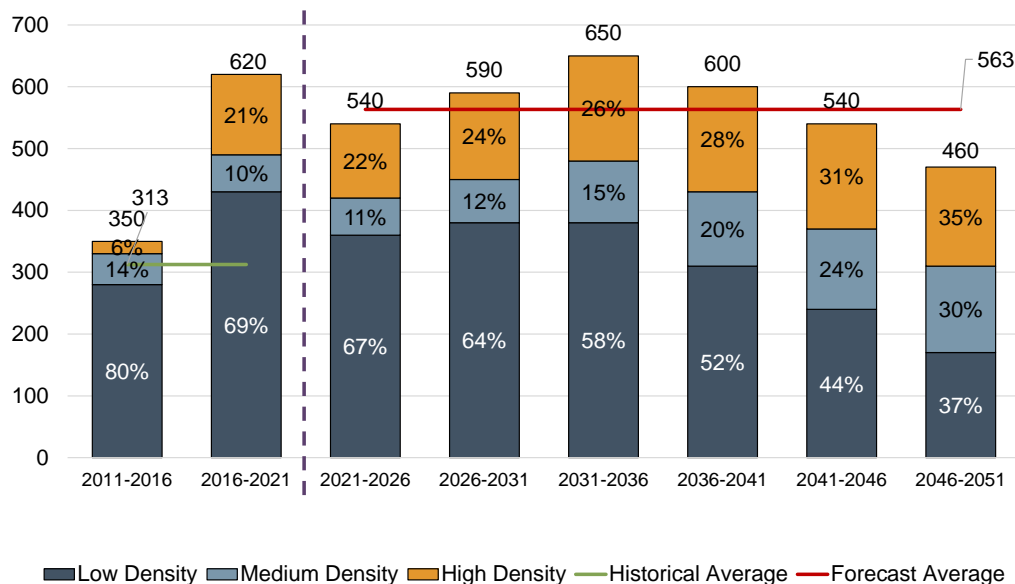
- The forecast represents an increase of approximately 16,910 households, which results in an increase of about 560 units annually or an annual housing growth rate of 1.6% per year. Comparatively, the average housing growth in the historical 10-year (2011 to 2021) period was about 310 units per year.
- The majority of new residential development is anticipated to be ground-oriented, i.e. low- and medium-density forms of housing (72%). Demand for low-density forms will be driven by demand from new families and move-up buyers. As housing prices in Ottawa continue to climb, residents are likely to seek relatively



more affordable housing options in nearby municipalities such as Carleton Place and Mississippi Mills. This also allows them to benefit from the urban amenities of Ottawa while enjoying the quality of life that areas like the County offer.

- Between 2011 and 2021, the share of medium- and high-density housing increased. This trend is expected to continue into the short-term forecast period, as recent building permit activity and active development applications suggest an increasing trend towards medium- and high-density residential development.
- The shift in dwelling type preferences is anticipated to be driven largely by the aging of the population and to a lesser extent from continued upward pressure on local housing prices.
- Over the 2021 to 2051 forecast period, new housing is expected to be comprised of 54% low-density (singles and semi-detached), 18% medium-density (multiples), and 27% high-density (apartments) units. While the share of medium- and high-density units is anticipated to increase, the overall housing base in the County would still largely comprise low-density housing (refer to Figure 3-5).

Figure 3-4
Lanark County
Incremental Annual Households by Structure Type, 2001 to 2051

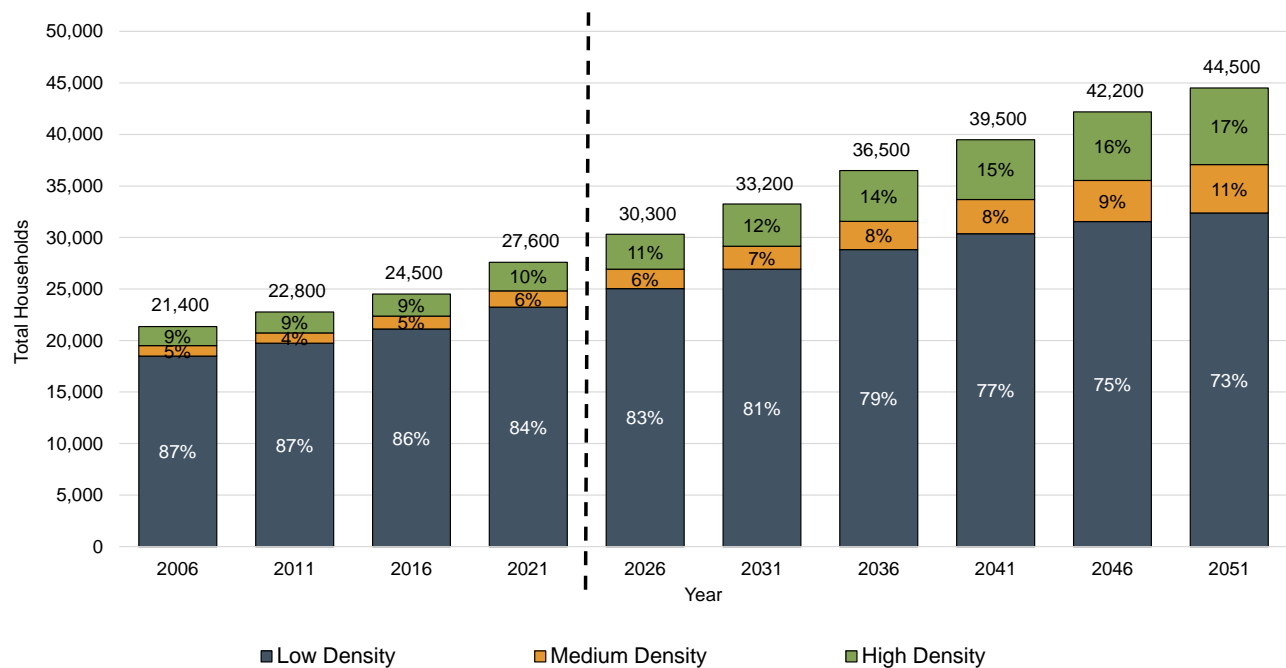


Source: 2006 to 2021 from Statistics Canada; forecast by Watson & Associates Economists Ltd., 2024.



Figure 3-5 summarizes the County’s total household forecast from 2021 to 2051. Housing for each period between 2006 and 2021 is also provided for historical context. By 2051, the County’s housing base is forecast to increase to 44,000 households from 27,600 in 2021. As shown, low-density housing forms represented 84% of total housing in 2021 and, by 2051, this is forecast to remain the predominant housing form in the County at 73%. While new housing growth in the County is forecast to occur in a wider variety of structure types, the existing housing base within the County will not be altered significantly. There will exist a substantial amount of low-density housing which will turn over throughout the next several decades, presenting considerable options for families to purchase a detached home in the County. To facilitate this turnover, the County will require a wider variety of housing options for older adults, including townhouses, ownership condominiums, rental apartments, and senior living housing.

Figure 3-5
Lanark County
Historical and Forecast Households, 2006 to 2051



Source: 2006 to 2021 from Statistics Canada; forecast by Watson & Associates Economists Ltd., 2024.



3.5 Lanark County Employment Growth Scenarios, 2021 to 2051

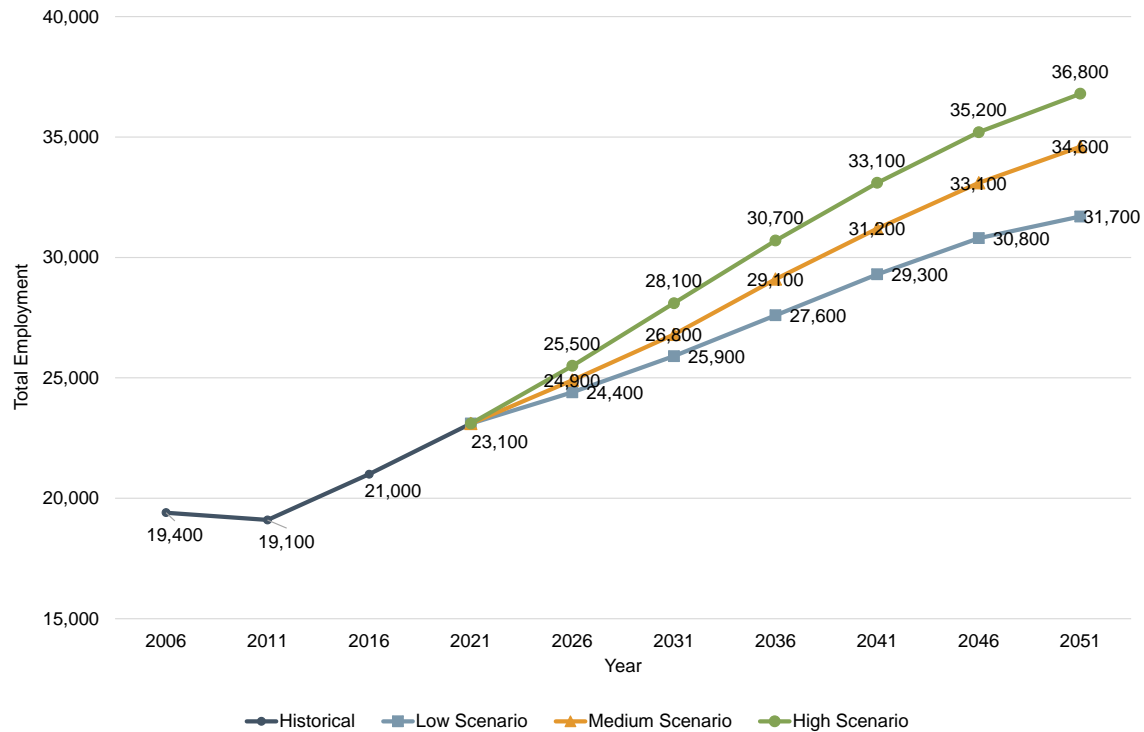
Building on the key growth assumptions discussed herein, three long-term employment growth scenarios from 2021 to 2051 have been developed for Lanark County, including a Low Scenario, Medium Scenario (recommended) and High Growth Scenario, as summarized in Figure 3-6.^[39] The following can be observed:

- The Low Scenario forecasts that employment in Lanark County will grow at an average annual rate of 1.1% per year. Under the Low Scenario, the Lanark County employment base is forecast to increase steadily between 2021 and 2051 by approximately 8,600 jobs, from 23,100 to 31,700.
- The Medium Scenario assumes an annual growth rate of approximately 1.4% for Lanark County between 2021 and 2051. Under the Medium Scenario, the County's employment base is expected to increase by approximately 11,500 jobs by 2051, increasing from 23,100 in 2021 to 34,600 by 2051.
- Under the High Scenario, Lanark County's employment base is forecast to grow at an average annual rate of roughly 1.6% per year. Under the High Scenario, the County is forecast to add approximately 13,700 jobs, increasing from 23,100 in 2021 to 36,800 by 2051.

^[39] Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized for the purposes of growth forecast calculations due to a significant increase in work at home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021, to June 14, 2021. Due to this, a 2023 employment base has been estimated by Watson and utilized for purposes of growth forecast and reporting.



Figure 3-6
Lanark County
Total Employment Forecast, 2021 to 2051



Employment Growth Scenario	2021	2051	2021-2051	Annual Growth	Annual Growth Rate
Low Scenario	23,100	31,700	8,600	290	1.1%
Medium Scenario	23,100	34,600	11,500	380	1.4%
High Scenario	23,100	36,800	13,700	460	1.6%

Note: Figures have been rounded. Activity rate uses population including the net Census undercount.

Source: 2006 to 2021 derived from Statistics Canada Census data, 2023 derived from Statistics Canada Census and EMSI data; scenarios by Watson & Associates Economists Ltd.

3.5.1 County-Wide Reference Employment Forecast, 2021 to 2051

In accordance with historical employment trends and the key macro and regional economic trends identified, the Medium Scenario represents the “recommended” (Reference) long-term employment growth scenario for Lanark County. Figure 3-7 summarizes the Lanark County Reference Scenario employment forecast and

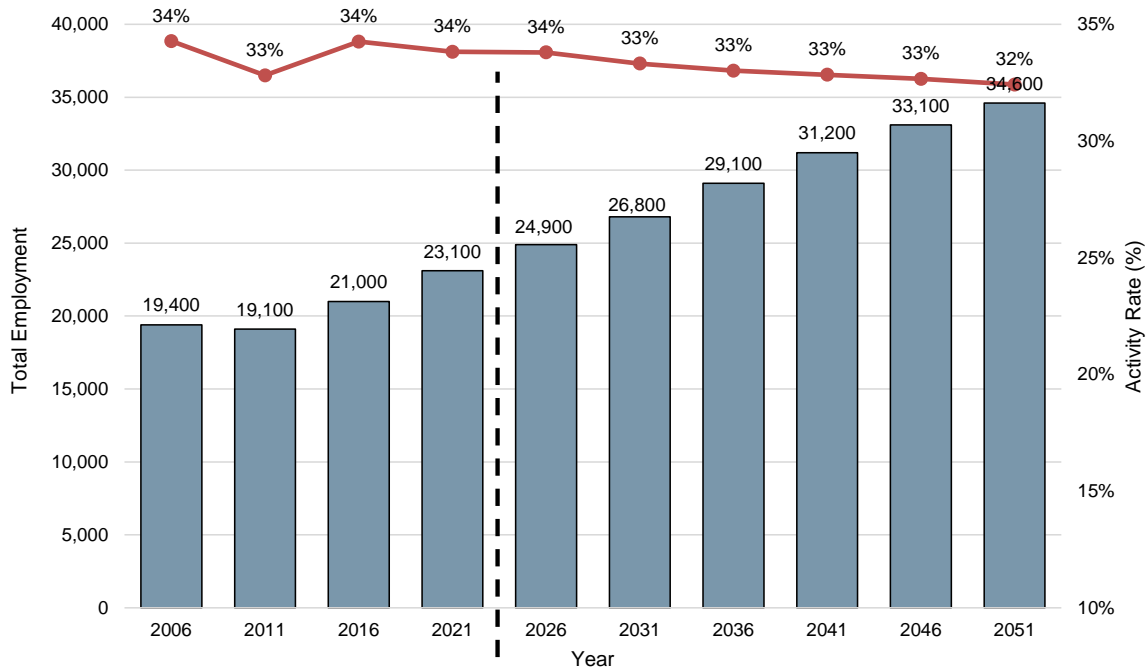


employment activity rate forecast (ratio of jobs to population) from 2021 to 2051 (see Appendix B for more details). Key observations include:

- Lanark County's employment activity rate (ratio of jobs to population) was approximately 34% in 2006. Between 2006 to 2011, there was a slight decline in the activity rate, largely due to structural changes in the macro-economy resulting in widespread provincial job losses in the manufacturing sector. It is noted that the global financial crisis of 2008/2009 further accelerated these job losses between 2010 and 2015. By 2021, it is estimated that the employment activity rate rebounded back to 34%, similar to the 2006 rate.
- Over the 2021 to 2051 forecast period, the County's employment activity rate is forecast to steadily decrease from 34% to 32% by 2051. This forecast decrease is attributed to the aging of the population. As the population ages, a larger proportion of people are anticipated to retire from full-time occupations and ultimately exit the workforce. This places downward pressure on the overall labour force participation rate if the number of retirees grows faster than the number of new entrants into the labour force (e.g., younger individuals or immigrants). Furthermore, it is estimated that a significant portion of the workforce from Lanark County will continue to commute to the City of Ottawa for employment, attracted by the diverse job opportunities the City offers. This trend is expected to have a long-term downward impact on the employment activity rate within the County.
- The County's employment growth is anticipated to be driven largely by population-related employment (including retail, accommodation and food services, and a range of knowledge-based sectors). Local employment opportunities associated with export-based employment sectors (e.g., transportation and warehousing, wholesale trade, construction and manufacturing) are also anticipated to experience moderate to steady growth. A sizeable percentage of forecast job growth is also anticipated to be accommodated through home occupations, home-based businesses, and off-site employment.



Figure 3-7
Lanark County
Permanent Employment Forecast Reference Scenario, 2021 to 2051



Notes: Figures have been rounded. Activity rate uses population including the net Census undercount. Statistics Canada 2021 Census place of work employment data has been reviewed. The 2021 Census employment results have not been utilized due to a significant increase in work-at-home employment captured due to Census enumeration occurring during the provincial COVID-19 lockdown from April 1, 2021, to June 14, 2021.

Source: 2006 to 2016 derived from Statistics Canada Census data, 2021 derived from Statistics Canada Census and EMSI data and forecast by Watson & Associates Economists Ltd., 2024.

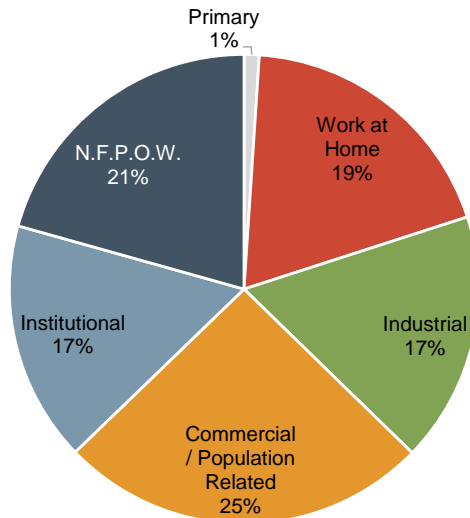
3.6 Overview of the Lanark County Medium Employment Scenario by Major Sector, 2021 to 2051

Figure 3-8 summarizes the share of employment growth by sector during the 2021 to 2051 forecast period. Employment sectors that generate a floor area requirement, including commercial, industrial and institutional, are anticipated to account for about 61% of employment growth over the forecast period. No fixed place of work (NFPOW) or off-site employment and work-at-home employment categories are forecast to comprise the remaining 39% of employment growth. When comparing these shares to historical employment growth by sector, it is observed that employment in population-



related sectors, particularly commercial, work-at-home, and NFPOW, is projected to grow slightly faster than historically observed, driven by the increased population growth outlook.

Figure 3-8
Lanark County
Permanent Employment Forecast Reference Scenario, 2021 to 2051



Source: Watson & Associates Economists Ltd., 2024.

3.7 Observations

By 2051, Lanark County's total population base is forecast to grow to approximately 106,600 persons under the Medium Scenario. This represents an increase of approximately 38,420 residents between 2021 and 2051, or an average annual population growth rate of 1.5% during this time period. Comparatively, the population of the Province as a whole is forecast to increase at a rate of 1.3% over the 2021 to 2051 period.^[40]

It is important to recognize that while the County's population base is growing, it is also getting older. Between 2021 and 2051, the 75+ age group is forecast to represent the

^[40] Ministry of Finance Fall 2024 Population Projections, Reference Scenario for the Province of Ontario.



fastest-growing population age group, with an average annual population growth rate of 3.2%. With an aging population, the County will be more reliant on net migration as a source of population as opposed to natural increase. With respect to future housing needs, strong population growth in the 75+ age group is anticipated to place increasing demand on medium- and high-density forms, including seniors' housing and affordable housing options. Lanark County is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Population growth associated with young adults is anticipated to be primarily driven by net migration.

Accommodating the forecast range in population growth across the County will require approximately 16,900 new households or 560 new households annually. For historical context, the County averaged just over 300 new households annually between 2011 and 2021. To adequately accommodate future housing demand across a diverse selection of demographic and socio-economic groups, a range of new housing typologies will be required with respect to built form, location, and affordability across the County.

Looking forward over the next five to 10 years and beyond, housing demand across all the County's area municipalities is anticipated to remain strong, particularly within urban areas, largely fueled by continued opportunities and outward growth pressure from Ottawa and elsewhere in Ontario.

Declining housing affordability and a range of broader economic headwinds, including persistently high inflation rates and rising household debt, are anticipated to moderate housing demand (particularly ownership housing) in the near term relative to recent historical trends over the past two to three years. However, as noted previously, recent reductions in interest rates are expected to alleviate some of the financial pressures on existing households, potentially offsetting the impact of higher borrowing costs that have contributed to declining housing affordability. This shift could lead to renewed activity in the housing market but may not lead to increased affordability in new housing sales, due to lower interest rates potentially increasing housing costs.



Chapter 4

Allocation of Population, Housing, and Employment Growth Forecasts by Local Municipality



4. Allocation of Population, Housing, and Employment Growth Forecasts by Local Municipality

The following chapter summarizes the forecast population, housing, and employment forecast by local municipality within Lanark County. Additional details regarding the local municipal growth allocations are provided in Appendix C and D.

4.1 Residential Growth Forecast by Area Municipality, 2021 to 2051

4.1.1 Lanark County Active Residential Supply, 2024

Figure 4-1 summarizes the County's active development applications by dwelling type as of summer 2024. Key observations are as follows:

- To contextualize current active development applications, an analysis of building permit data from the past five years in the County reveals a predominance of low-density developments (57%), followed by high-density (25%) and medium-density (18%) developments. This historical trend highlights a strong preference towards low-density housing but recent building trends and active development applications highlight a shift in building preferences.
- Lanark County has a total of 5,600 units in active development applications. This reflects the potential for ongoing growth and residential development activity within the County over the near- to medium-term (i.e. next decade).
- Of the 5,600 units within the development approvals process, nearly 3,100 (55%) are considered approved or draft approved.
- Active residential development applications demonstrate a wide range of housing structure types, with 44% categorized as low-density developments, 47% as medium-density, and the remaining 9% as high-density developments.



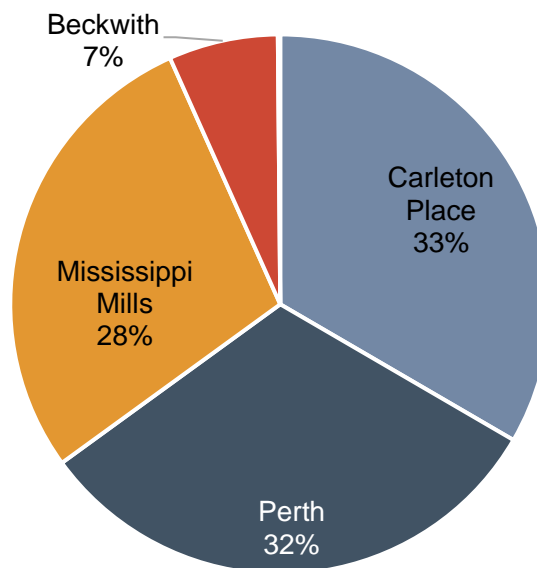
Figure 4-1
Lanark County
Active Development Applications

Status	Low Density	Medium Density	High Density	Total
Approved	750	1,106	66	1,922
Draft Approved	400	694	120	1,214
Under Review	1,309	834	321	2,464
Total	2,459	2,634	507	5,600
Share	44%	47%	9%	-

Source: Lanark County data, October 2023; updated for the Town of Perth, Town of Carleton Place and Municipality of Mississippi Mills in June 2024.

Figure 4-2 summarizes the County’s total approved and draft-approved units by local municipality as of June 2024. Notably, the urban municipalities of Carleton Place, Mississippi Mills, and Perth account for 92% of the approved units in the development approvals process. The remainder of the approved and draft-approved units are relatively dispersed across the County.

Figure 4-2
Lanark County
Approved and Draft Approved Development Applications by Area Municipality



Source: Lanark County data, October 2023; updated for the Town of Perth, Town of Carleton Place and Municipality of Mississippi Mills in June 2024.



4.1.2 Residential Growth Forecast Approach and Key Assumptions

The population and housing allocations by local municipality were carefully developed through a comprehensive review of several key local supply and demand factors:

Local Supply Factors

- Availability of potential future housing stock currently in the development approvals pipeline, categorized by housing type, and approval stage;
- Local residential intensification opportunities;
- Consideration of water and wastewater service capacity, informed through insights from municipal;
- Rural lot availability to accommodate growth; and
- Provincial policy guidance on residential growth forecasts for both urban and rural communities, acknowledging the unique challenges of balancing high-density demands in urban cores with the aspirations for communally-serviced, medium-density development in rural localities.

Local Demand Factors

- Analysis of historical population and housing data from 2001 to 2021 Statistics Canada Census;
- An assessment of recent residential building permit trends, segmented by housing type and local municipality, with emphasis on the shifting preference towards medium- and high-density developments in certain urban areas;
- A high-level analysis of local and regional employment trends within the County and surrounding commuter zones, considering how job opportunities influence residential appeal and population growth patterns;
- An evaluation of market demand for residential intensification;
- Proximity to the City of Ottawa and local municipal attractiveness based on diverse demographics, including young professionals, families, and the growing senior population.

Although forecast population growth rates vary considerably across different geographic areas, all area municipalities within Lanark County share a number of common characteristics when it comes to long-term residential development and demographic trends, including:



- All area municipalities, particularly those within urban settlement areas, are anticipated to experience housing growth over the long-term forecast period;
- For nearly all municipalities, levels of new housing construction are anticipated to remain above the longer-term historical averages seen over the past two decades;
- Over the long term, the average yearly rate of housing construction is expected to gradually slow down compared to the recent high levels of building activity. This is mainly due to an aging population across the County;
- Average housing occupancy rates are forecast to decline steadily from 2021 to 2051. This trend is mainly linked to the aging of the Baby Boomer generation and the demographic transition of succeeding generations, including Generation X and Millennials, over the long term.
- Housing demand from the 55-74 age group (empty nesters and younger seniors) and the 75+ age group (older seniors) is also anticipated to play a key role in shaping future needs. This includes a growing requirement for urban housing options, such as high-density rental units, ownership housing, and specialized senior housing, across municipalities within Lanark County. This broad demographic trend within the County is expected to have a more direct housing impact on the municipalities that can accommodate high-density development within urban areas.

4.1.3 Lanark County Forecast Housing Demand by Urban Settlement Areas and Remaining Rural Areas, 2021 to 2051

This subsection summarizes the long-term residential demand in Lanark County by urban and rural areas throughout the forecast horizon of 2021 to 2051. As shown Figure 4-3, under the Medium Scenario, the County's housing base is forecast to increase by 16,920 units over the 30 years. Approximately 60% of this County-wide housing growth is expected to occur within the urban serviced areas of Almonte, Carleton Place, and Perth. This forecast would result in an estimated 10,200 new households within urban areas over the forecast period, translating to an annual increase of around 340 units annually. High-density dwelling growth, primarily in the form of apartments, is expected to represent 40% of all housing development in these areas.

The remaining urban and rural areas are forecast to add 6,720 new residential units. Development in these areas is projected to have a strong emphasis on single and semi-detached dwellings, totalling 6,040 units. In contrast, multiple-unit housing, such as



townhouses and duplexes, is forecast to contribute a modest 200 units.^[41] Within rural areas, high-density developments are forecast to account for 480 units, primarily comprised of secondary units.

Figure 4-3
Lanark County
Forecast Housing Demand, Urban and Rural Area, 2021 to 2051

Development Location	Timing	Single & Semi-Detached	Multiples ^[1]	Apartments ^[2]	Total Residential Units	Proportionate Share of Total
Urban Settlement Area Growth ^[3]	2021 to 2051	3,290	2,850	4,060	10,200	60%
Remaining Rural Areas		6,040	200	480	6,720	40%
Lanark County		9,330	3,050	4,540	16,920	100%

^[1] Includes townhouses and apartments in duplexes.

^[2] Includes accessory apartments, bachelor, 1-bedroom and 2-bedroom+ apartments.

^[3] Includes the Urban Settlement Areas of Almonte, Carleton Place, and Perth.

Source: Watson & Associates Economists Ltd., 2024.

4.1.4 Summary of Long-Term Population and Household Growth Forecasts by Local Municipality

Figure 4-4 through Figure 4-6 summarize the County’s long-term population and housing forecast by local municipality over the 2021 to 2051 planning horizon. Further details regarding the residential growth forecast by area municipality and Settlement Area can be found in Appendix C. Between 2001 and 2021, some municipalities experienced limited or modest growth. Over the forecast period, it is anticipated that all municipalities will experience sustained population and housing growth.

Notably, Carleton Place and Mississippi Mills are forecast to see the largest increase in both housing and population in absolute terms. Units in the development approvals process, including a notable rise in high-density residential applications, provide insight

^[41] Subject to private servicing configurations.



into near- to medium-term (next one to five years) housing demand, particularly in these key urban areas.

Each municipality in Lanark County has unique demographic characteristics that will influence growth over the next 30 years. Beckwith and Montague have relatively young populations, suggesting a continued need for family-oriented housing and community services. In contrast, Tay Valley has the highest proportion of seniors, with 32.1% of the population aged 65 and over, highlighting a significant demand for senior housing which may be partially accommodated elsewhere in the County. Further to this, the proximity to the City of Ottawa is a consideration when examining the potential for intraprovincial migration and commuting opportunities. The following provides a summary of the forecast by area municipality:

Township of Beckwith

- As outlined in Figure 4-4, the population of Beckwith is anticipated to reach approximately 13,630 by 2051, contributing around 11% of the County's projected population growth over the forecast period.
- Figure 4-5 estimates an annual population growth rate of 1.3%, which is lower than the 1.9% growth rate observed between 2001 and 2021. Notably, this moderation reflects the stronger-than-average growth Beckwith experienced between 2011 and 2021. While the rate of growth has decreased, the annual population increase is projected to remain stable at approximately 150 people both historically and forecast over the next 30 years.
- Recent trends further support this trajectory. Between 2021 and 2024, Beckwith's population grew at a rate of 0.92%, and available supply opportunities in the development pipeline suggest this trend will continue without significant deviation. Historically, Beckwith has accounted for 14% of the County's low-density units and is forecast to contribute 17% of overall low-density growth in the County over the next 30 years.
- Beckwith is expected to add approximately 60 households annually over the forecast period, which is slightly less than the pace of housing growth observed over the historical period, as shown in Figure 4-6. This is, in part, due to subdued development activity since the release of the Census in 2021, limited units in the development approval process that are approved or draft-approved (approximately 100 units), and the long-term forecast of the aging population placing downward pressure on the need for new housing development.



Town of Carleton Place

- Figure 4-4 projects that Carleton Place's population will grow to 23,700 by 2051, accounting for 28% of the County's overall population increase.
- The annual growth rate is forecast at 2.1%, the highest in the County, significantly outpacing the historical average of 1.5% from 2001 to 2021, as shown in Figure 4-5.
- Carleton Place is projected to add 164 housing units per year, nearly doubling the historical average of 89 units annually, as outlined in Figure 4-6.
- Figure 4-7 indicates that Carleton Place is likely to lead the County in high-density and medium-density developments over the next three decades.

Township of Drummond/North Elmsley

- As presented in Figure 4-4, the population of Drummond/North Elmsley is expected to reach 11,530 by 2051, contributing about 8% of the County's total growth.
- The forecast annual growth rate is 1.1%, a modest increase from the 1.0% historical rate, as indicated in Figure 4-5.
- Housing growth is projected at 44 units per year, aligning closely with the historical average of 42 units, as summarized in Figure 4-6.

Township of Lanark Highlands

- Figure 4-4 anticipates that Lanark Highlands will reach a population of 8,240 by 2051, accounting for 6% of the County's overall population growth.
- The annual growth rate is expected to rise to 1.1%, compared to the historical rate of 0.8%, as estimated in Figure 4-5.
- Housing growth is forecast at 33 units annually, slightly higher than the historical rate of 31 units per year, as shown in Figure 4-6.

Town of Mississippi Mills

- Mississippi Mills is projected to have a population of 25,820 by 2051, representing 28% of the County's population growth, as outlined in Figure 4-4.
- Figure 4-5 forecasts an annual growth rate of 1.8%, a notable increase from the 1.1% observed between 2001 and 2021.



- Approximately 70% of housing growth is anticipated to occur in Almonte, emphasizing its role as a key area for development within the municipality.
- Figure 4-6 estimates that 154 housing units will be added annually, up from the historical 90 units per year.
- Mississippi Mills is expected to have the second-largest share of housing growth in the County, as shown in Figure 4-7.

Township of Montague

- Figure 4-4 projects that Montague's population will reach 5,440 by 2051, contributing to 4% of the County's overall growth.
- The annual population growth rate is forecast at 1.0%, a significant increase from the historical 0.2% rate, largely due to recovery from earlier population declines, as indicated in Figure 4-5.
- Montague is expected to add 20 housing units per year, compared to the historical average of 17 units, as estimated in Figure 4-6.

Town of Perth

- The population of Perth is projected to grow to 10,630 by 2051, accounting for 10% of the County's total growth, as presented in Figure 4-4.
- The forecast annual growth rate is 1.6%, a significant jump from the historical rate of 0.3%, as shown in Figure 4-5.
- Perth is anticipated to add 64 housing units per year, as summarized in Figure 4-6.
- The higher population and housing projections are partly attributed to recovery from population declines between 2001 and 2011. Since 2021, Perth has been the second-fastest-growing municipality and has a strong pipeline of high-density development, indicating sustained growth.
- Figure 4-7 positions Perth to have the third-highest share of high-density and medium-density developments in the County, after Carleton Place and Mississippi Mills.

Tay Valley Township

- Tay Valley is expected to grow to a population of 7,630 by 2051, contributing 4% to the County's overall population growth, as indicated in Figure 4-4.



- The forecast annual growth rate is 0.8%, doubling the historical rate of 0.4%, as presented in Figure 4-5.
- Figure 4-6 projects that Tay Valley will add 28 housing units per year, up from the historical average of 26 units.

Figure 4-4
Lanark County
Historical and Forecast Population by Local Municipality, 2021 to 2051

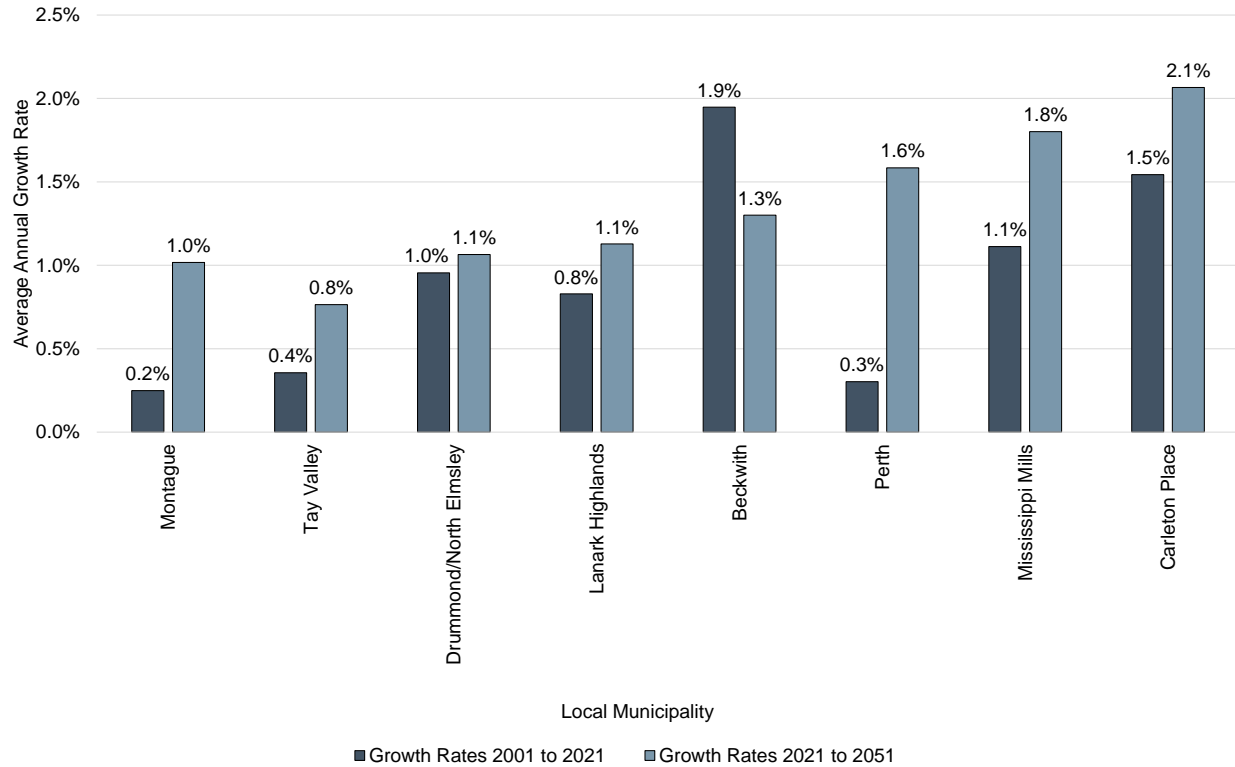
Area Municipality	Population			Average Annual Growth Rate	
	2001	2021	2051	Historical	Forecast
Beckwith	6,046	9,021	13,290	2.0%	1.3%
Carleton Place	9,083	12,517	23,120	1.6%	2.1%
Drummond/North Elmsley	6,670	8,183	11,240	1.0%	1.1%
Lanark Highlands	4,795	5,737	8,030	0.9%	1.1%
Mississippi Mills	11,647	14,740	25,180	1.2%	1.8%
Montague	3,671	3,914	5,300	0.3%	1.0%
Perth	6,003	6,469	10,370	0.4%	1.6%
Tay Valley	5,440	5,925	7,450	0.4%	0.8%
Lanark County	53,355	66,506	103,980	1.1%	1.5%

Note: Forecast numbers have been rounded and the population includes an estimated 2021 Census undercount of 2.52 %.

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.



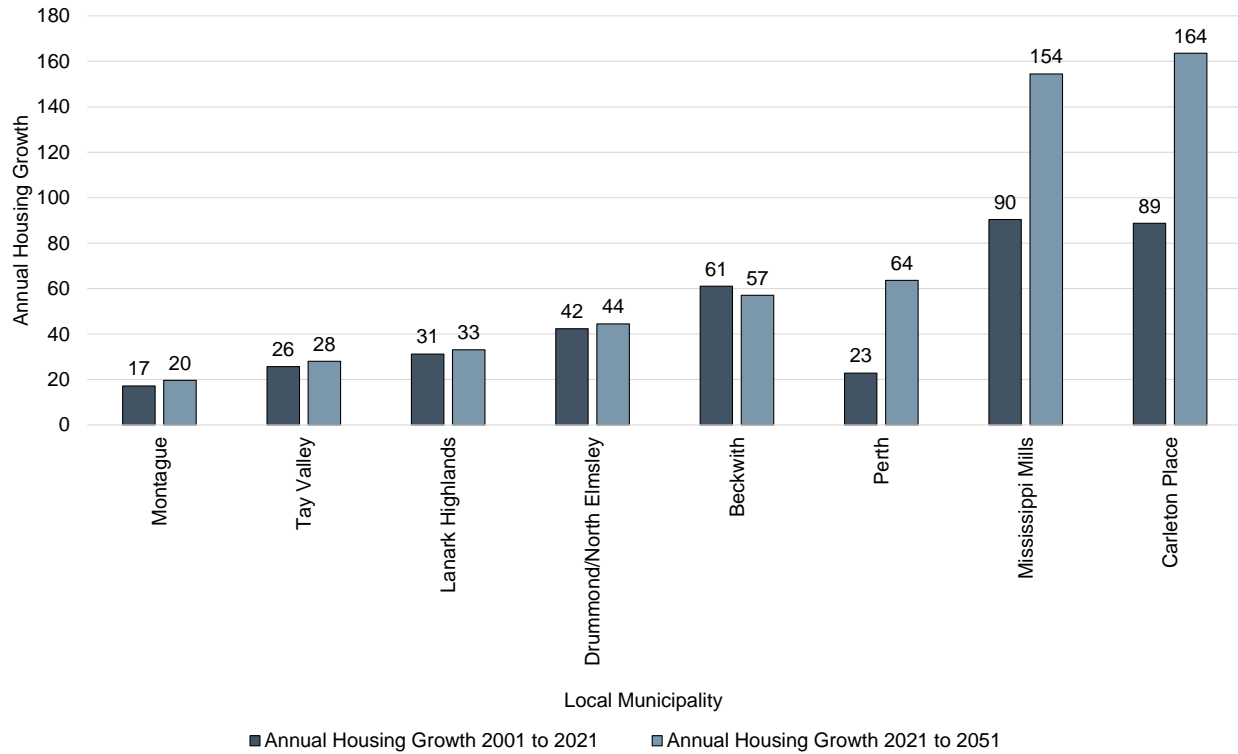
Figure 4-5
Lanark County
Population Forecast Growth Rates by Area Municipality, 2021 to 2051



Source: Historical data (2001 to 2021) from Statistics Canada; forecast by Watson & Associates Economists Ltd., 2024.



Figure 4-6
Lanark County
Annual Housing Growth by Area Municipality, 2021 to 2051



Source: Historical data (2001 to 2021) from Statistics Canada; forecast by Watson & Associates Economists Ltd., 2024.



Figure 4-7
Lanark County
Forecast Housing Growth by Type by Local Municipality, 2021 to 2051

Area Municipality	Low Density ¹	Medium Density ²	High Density ³	Apartments and Stacked Townhomes	Secondary Units	Total Units
Beckwith	1,570	60	80	0	80	1,710
Carleton Place	1,680	1,340	1,890	1,700	190	4,910
Drummond/North Elmsley	1,200	50	90	0	90	1,340
Lanark Highlands	880	40	70	0	70	990
Mississippi Mills	2,080	1,100	1,460	1,310	150	4,640
Montague	520	30	40	0	40	590
Perth	660	410	840	740	100	1,910
Tay Valley	740	30	70	0	70	840
Lanark County	9,330	3,060	4,540	3,750	790	16,930

¹ Low density includes single- and semi-detached units.

² Medium density includes side-by-side and back-to-back townhomes.

³ High density includes stacked townhomes, apartments, and secondary units.

Note: Figures may not add precisely due to rounding.

Source: Forecast by Watson & Associates Economists Ltd., 2024.

4.2 Summary of Long-Term Employment Growth Forecasts by Local Municipality

Figure 4-8 and Figure 4-9 present the County's long-term employment forecast between 2024 and 2051, which generally indicates a consistent upward trend in job growth across most municipalities. The expected increase in work-at-home jobs and employment within commercial/population-related sectors reflects ongoing shifts in how and where people work, trends that have been observed and are anticipated to



continue. As most municipalities face increasing population growth pressures compared to historical trends, there will be an associated increased need for population-related jobs which serve this growing and aging population. Further to these population-related sectors, Figure 4-9 provides the forecast distribution of industrial employment against the population-related growth. As shown, the relative distribution of forecast industrial growth varies by local municipality. The following provides further details about the employment growth forecast:

Township of Beckwith

- Figure 4-8 indicates that 77% of employment is forecast to be in population-related jobs, while 23% is expected to be in the industrial sector, reflecting a diverse employment distribution.
- Employment growth in Beckwith, detailed in Figure 4-9, is forecast to be led by 310 new jobs in the commercial sector, followed by 280 jobs in the industrial sector, and 230 jobs in the work-at-home sector.

Town of Carleton Place

- Employment growth in Carleton Place, as presented in Figure 4-8, is forecast to be dominated by population-related jobs (89%), with only 11% expected in the industrial sector, emphasizing a service-driven economy.
- Carleton Place is forecast to be the second fastest-growing municipality in the County for job growth.
- Figure 4-9 shows that the largest job gains are anticipated in the commercial sector (730 jobs), followed by 540 work-at-home jobs, and 300 industrial jobs.

Township of Drummond/North Elmsley

- The breakdown in Figure 4-8 indicates that 77% of jobs are forecast to be population-related, with 23% expected to be industrial, suggesting relatively strong opportunities for industrial development. Historically, the area has maintained an industrial employment share of above 18%, which reinforces the potential for continued industrial growth.
- In Figure 4-9, job growth is forecast to be driven by 220 new jobs in the commercial sector, followed by 200 industrial jobs, and 160 work-at-home jobs.



Township of Lanark Highlands

- Employment distribution, as detailed in Figure 4-8, is forecast to be predominantly population-related (90%), with only 10% expected in the industrial sector.
- Figure 4-9 notes that job growth is expected to be modest, led by 170 new jobs in the commercial sector, followed by 120 work-at-home jobs, and 50 industrial jobs.

Town of Mississippi Mills

- As depicted in Figure 4-8, 87% of employment is forecast to be population-related, with 13% in the industrial sector, emphasizing a service-oriented workforce.
- This distribution towards population-related employment is due, in part, to the level of population growth forecast in Mississippi Mills. With such strong growth pressures, it is anticipated that a significant amount of population-related employment will be needed to serve the population. The Municipality is forecast to experience the greatest amount of total job growth over the forecast period.
- Figure 4-9 identifies the primary sources of growth as 760 new jobs in the commercial sector, followed by 560 work-at-home jobs, and 360 industrial jobs.

Township of Montague

- The employment distribution in Figure 4-8 shows that 79% of jobs are forecast to be population-related, with 21% expected to be industrial, reflecting a higher distribution towards industrial employment compared to the County-wide average.
- According to Figure 4-9, growth is expected to be driven by 90 new jobs in the commercial sector, followed by 80 industrial jobs, and 70 work-at-home jobs.

Town of Perth

- The job composition, illustrated in Figure 4-8, is forecast to include 75% population-related jobs and 25% industrial jobs, highlighting a relatively strong industrial presence. Perth is expected to have the highest relative concentration of industrial development compared to all other municipalities and has a significant supply of vacant industrial land.

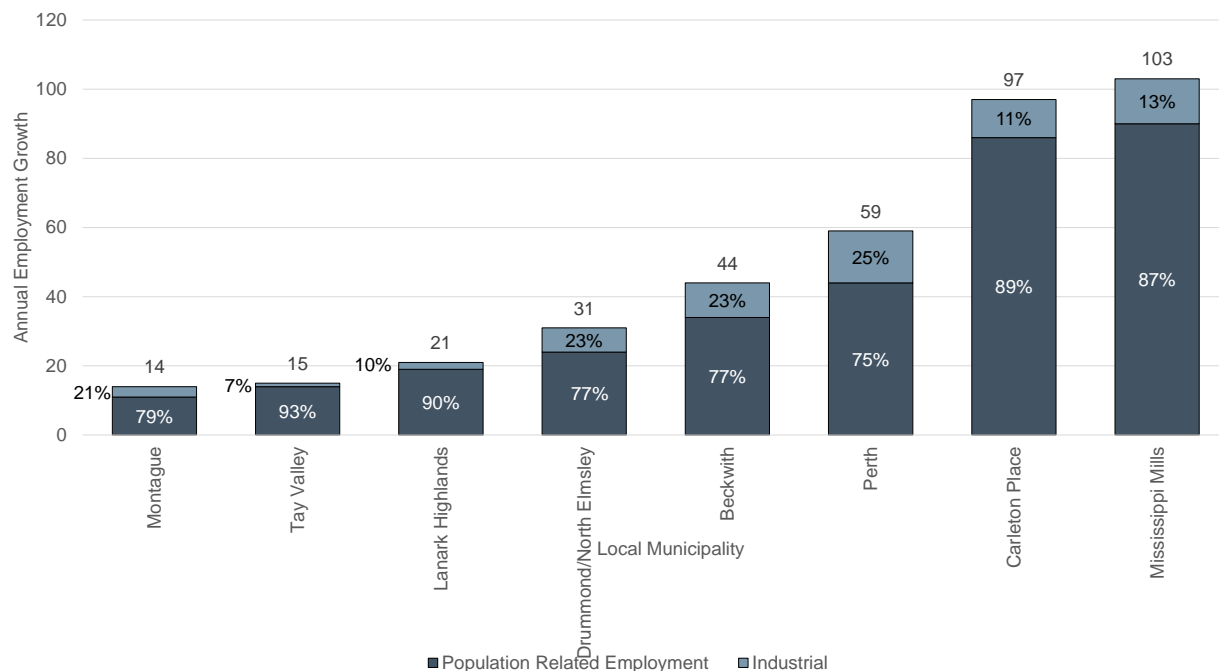


- Figure 4-9 highlights a relatively sizeable growth forecast in the industrial sector (410 jobs), along with 290 new jobs in the commercial sector, and 220 work-at-home jobs.

Tay Valley Township

- Figure 4-8 reveals that 93% of employment is forecast to be population-related, with only 7% expected in the industrial sector, emphasizing a job profile heavily oriented towards the service economy.
- Figure 4-9 highlights job additions forecast to include 110 new jobs in the commercial sector, followed by 80 work-at-home jobs.

Figure 4-8
Lanark County
Distribution of Annual Employment Growth by Area Municipality
(Population Related vs. Industrial), 2024 to 2051



Source: Forecast by Watson & Associates Economists Ltd., 2024.



Figure 4-9
Lanark County
Employment Forecast by Area Municipality, 2024 to 2051

Location	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	NFPOW ^[1]	Total Employment (Including NFPOW)
Beckwith	0	230	280	310	120	250	1,200
Carleton Place	0	540	300	730	460	590	2,620
Drummond/North Elmsley	10	160	200	220	80	180	840
Lanark Highlands	10	120	50	170	80	140	560
Mississippi Mills	20	560	360	760	480	620	2,790
Montague	20	70	80	90	40	80	380
Perth	10	220	410	290	430	230	1,580
Tay Valley	40	80	30	110	50	90	420
Lanark County	110	1,980	1,710	2,680	1,740	2,180	10,390

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

Note: Numbers may not add precisely due to rounding. See appendix for unrounded values.

Source: Forecast by Watson & Associates Economists Ltd., 2024.



4.3 Observations

Lanark County is projected to experience a notable increase in both population and employment over the next 30 years, with growth anticipated across all municipalities. Urban areas such as Mississippi Mills, Carleton Place, and Perth are expected to see the most significant increases, driven by demand for higher-density housing and expanding job opportunities in commercial and population-related sectors. At the same time, rural municipalities including Tay Valley and Lanark Highlands are expected to experience more moderate yet steady growth. Population growth is anticipated to be supported by an increase in work-at-home opportunities and a balanced mix of industrial and population-related employment, which will continue to shape the economic landscape. Higher population growth rates across all major demographic groups (i.e. families, children, empty nesters and seniors) highlight the continued importance of planning for a variety of housing options, providing necessary infrastructure, and building complete and sustainable communities throughout the County.



Chapter 5

Urban Land Needs Assessment, 2023 to 2051



5. Urban Land Needs Assessment, 2024 to 2051

The following chapter provides an overview of Lanark County's urban land needs to 2051 and examines opportunities to accommodate long-term growth within residential and Employment Areas. While the County's rural areas are vital for accommodating long-term growth and maintaining the unique character of the County, the land needs analysis exclusively focuses on the urban components of the County. Ensuring that there is sufficient serviceable land to accommodate long-term growth within the urban areas in Lanark County is key to the County's ability to accommodate forecast population, housing, and employment demand. As discussed in Section 1.2., the PPS 2024 provides a policy context for designating urban lands for a minimum of 20 years and a maximum of 30 years.

5.1 Residential Land Needs Analysis, 2024 to 2051

5.1.1 Long-Term Intensification Potential

A key consideration of an urban land needs analysis is forecasting the amount of growth that can be accommodated through intensification. The PPS 2024 defines intensification as the development of a property, site or area at a higher density than currently exists through:

- a) redevelopment, including the reuse of brownfield sites and underutilized shopping malls and plazas;
- b) the development of vacant and/or underutilized lots within previously developed areas;
- c) infill development; and
- d) the expansion or conversion of existing buildings.

Several factors are driving the demand for intensification. With an aging population in Lanark County and the surrounding areas, some residents may wish to downsize their current housing accommodations and/or relocate to a more urban setting with more walkable amenities. This places demand for additional forms of high-density housing and seniors' housing to be located within proximity to urban amenities. Lifestyle preferences across all major demographic groups (i.e., young adults, first-time home buyers, move-up buyers, empty nesters, and seniors) are also recognized as a key



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

5.1.1.1 Known Intensification Supply Opportunities

As noted above, intensification can take on several forms, including the development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of occupied sites. This subsection provides an overview of Lanark County’s residential intensification supply inventory, based on an assessment undertaken by each of the County’s area municipalities with urban Settlement Areas.^[42]

Based on this local municipal inventory, the municipalities of Carleton Place, Mississippi Mills, and Perth, have a combined estimated intensification potential of 2,360 housing units within existing urban built-up areas. A majority of these units are estimated to be within Carleton Place, followed by Perth, and Mississippi Mills.

^[42] The supply analysis conducted through this study did not examine supply opportunities at a site-specific level. Intensification opportunities were assessed more broadly through the information and review conducted by Towns of Perth and Carleton Place as a part of their ongoing CR process. An estimate has been made for Mississippi Mills based on discussion with Staff. It is recommended that the County engage in a detailed intensification study to more accurately determine the supply opportunities that exist within the urban areas.



Figure 5-1
Lanark County
Number of Units in Intensification Supply

Urban Area	Number of Units in Intensification
Carleton Place	1,190
Almonte, Mississippi Mills	570
Perth	620
Total – Lanark County Urban Areas	2,360

Source: Derived based on data provided by area municipalities, compiled by Watson & Associates Economists Ltd., 2024.

In addition to the above intensification supply opportunities within existing built-up urban areas, the County will continue to see intensification opportunities through secondary units (basement apartments, “granny flats,” etc.). These secondary units have the ability to accommodate additional population growth throughout the County without the need for additional urban land.

5.1.2 Supply Opportunities in Greenfield Neighbourhoods

For urban residential growth that isn’t accommodated through intensification, serviced greenfield areas are required. To determine the County’s capacity to accommodate future housing growth, a residential supply inventory was prepared. This inventory includes the lands in the active development approvals process as well as remaining vacant residential lands. As discussed in Section 4.1, as of mid-2024, there were 5,600 units in the active development approvals process in the County.

Appendix E graphically displays the location of these lands and identifies lands that are considered vacant (as of mid-2024). To determine the residential unit capacity on these lands, known environmental constraints were removed from the supply, and a further 65% gross-to-net adjustment on unsubdivided lands was utilized to account for future infrastructure requirements (i.e., roads, parks, stormwater ponds, easements, etc.) and some non-residential community uses (i.e., stores, schools, retail, etc.). With a net land area established, a unit yield by structure type was developed to estimate the total



capacity of the lands in vacant residential areas. Based on this total unit potential, the vacant greenfield land supply is estimated at approximately 2,900 units.^[43]

Figure 5-2
Lanark County
Housing Supply on Vacant Greenfield Lands (Excluding Lands under Active Applications)

Location	Gross Residential Land (excluding environmental features)*	Vacant Net Residential Area**	Total Unit Potential
Perth	14	9	360
Almonte, Mississippi Mills	35	23	940
Carleton Place	60	39	1,560
Grand Total	110	71	2,860

* Excludes vacant residential lands under active applications (registered, approved, under review, pre-consultations).

** Adjustment factor of 65% for common community facilities and internal infrastructure.

Note: Numbers may not add precisely due to rounding.

Source: Watson & Associates Economists Ltd., 2024.

5.1.3 Lanark County – Urban Residential Area Land Needs

5.1.3.1 Policy Context

As previously identified, requirements for long-term residential land needs in Ontario municipalities are set out in the PPS, 2024. As such, the County must plan for its long-term land needs in accordance with the requirements of the PPS, 2024. Subsection 2.1.3 of the PPS states that:

“At the time of creating a new official plan and each official plan update, 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 at least 20 years, but not more than 30 years, informed by provincial guidance. Planning for infrastructure, public service facilities, strategic

^[43] A unit yield of 25 low-density units, 35 medium-density units, and 90 high-density units per net ha was assumed. The resulting combined yield is estimated at 40 total units per net ha.



growth areas and employment areas may extend beyond this time horizon”

Subsection 2.1.4 of the PPS, 2024 further states:

“To provide for an appropriate range and mix of housing options 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 15 years through 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, including units in draft approved or registered plans.”

Accordingly, the urban land needs analysis conducted has considered the three-year, fifteen-year, and long-term plan horizon (to 2051).

5.1.3.2 Urban Land Needs Analysis by Area Municipality, 2024 to 2051

This section summarizes the urban land needs for the County under the context of the Provincial planning framework discussed above. As summarized in the previous chapter, approximately 60% of housing growth in the County is anticipated within urban areas of Almonte, Carleton Place and Perth, while the remaining 40% is forecast to be accommodated in the County’s rural Settlement Areas and other rural areas.

Figure 5-3 summarizes Lanark County’s ability to accommodate short-term housing demand based on potential housing supply identified within draft approved and registered plans, including identified housing intensification demand by urban settlement area.^[44] This analysis indicates that Lanark County has an adequate supply of potential housing units in registered and draft-approved plans, as well as intensification to accommodate housing demand over a three-year period, in accordance with subsection 2.1.4 (b) of the PPS 2024.

^[44] Short-term housing demand has been derived from the 2024 to 2027 housing forecast within the Counties’ urban settlement area.



Figure 5-3
Lanark County
Three-Year Urban Housing Supply

Settlement Area	Short-term Supply (Draft Approved and Registered Housing Units)	Short-Term Annual Housing Demand	Demand Adjusted for Intensification	Years of Supply
Perth	158	57	43	4
Almonte - Mississippi Mills	349	103	88	4
Carleton Place	1,042	167	134	8
Total - Urban	1,549	327	265	6

Note: Adjusted based on the overall long-term share of housing demand forecast to be met through intensification (i.e. about 25% for Carleton Place, 15% for Almonte, and 20% for Perth)
Source: Watson & Associates Economists Ltd., 2024.

Figure 5-4 summarizes the potential supply of future housing units in the active approvals process, including potential housing growth on vacant designated residential areas within Lanark County by urban settlement area, as summarized in Chapter 4. Based on the projected housing growth for the next 15 years, Lanark County's urban settlement areas have the capacity to meet housing demand for up to 28 years within its urban areas.

Figure 5-4
Lanark County
15-Year Urban Housing Supply

Settlement Area	Total Supply of Housing under Active Approvals Process	Greenfield Supply	Total Supply of Housing Units on Designated Urban Land	15-Year Annual Housing Demand adjusted for intensification	Years of Supply
Perth	1,770	363	2,133	50	43
Almonte - Mississippi Mills	1,585	938	2,523	100	25
Carleton Place	1,870	1,558	3,428	137	25
Total - Urban	5,225	2,858	8,083	287	28

Note: Adjusted based on the overall long-term share of housing demand forecast to be met through intensification (i.e. about 25% for Carleton Place, 15% for Almonte, and 20% for Perth)
Source: Watson & Associates Economists Ltd., 2024.



Figure 5-5 summarizes the long-term urban housing needs over the 2024 to 2051 planning horizon, based on forecast long-term demand and total available housing supply within the County's urban Settlement Areas. In assessing the long-term needs, it is assumed that not all of the supply opportunities for infill/redevelopment will be exhausted over the planning horizon. Accordingly, as shown in Figure 5-5, it is forecast that approximately 1,780 units will be accommodated through intensification between 2024 and 2051.^[45]

Comparing the anticipated housing development yield of Lanark County's designated vacant urban greenfield residential lands (8,090 housing units), against forecast urban greenfield housing demand to 2051 (7,480 units), generates a potential County-wide surplus of approximately 610 housing units by 2051. This result indicates that the County's aggregate supply of designated Urban Residential land within its urban Settlement Areas is sufficient to accommodate urban housing demand over the planning horizon. Within the County, a surplus of designated urban residential lands is forecast in Perth, while Mississippi Mills and Carleton Place have a forecast deficit of six ha and two ha, respectively.

The PPS, 2024 presents a more flexible horizon for planning for growth by providing a planning horizon with a minimum of 20 years and a maximum of 30 years. Given the small nature of the deficits identified above over the 27-year planning horizon, there is a sufficient amount of residential land available in each municipality to satisfy the 20-year minimum requirement for urban growth. Further to this, a review of residential intensification opportunities is recommended for each of the local municipalities, which would ultimately have an impact on the land needs. Given that the 20-year PPS requirement is satisfied, it is recommended that the County and its local municipalities reassess the land needs after this intensification review has been conducted.

^[45] Based on the assumption that over the forecast period, about 25% of demand for Carleton Place, 15% for Almonte, and 20% for Perth will be met through intensification.



Figure 5-5
Lanark County
Long-Term Urban Housing Needs, 2024 to 2051

Urban Community	Unit Capacity of Vacant Residential Lands	Units in Active Development Plans	Total Housing Unit Supply on Vacant Lands	Unit Forecast (Permanent), 2024 to 2051	Intensification %	Intensification Adjustment	Long Term Demand Adjusted for Intensification	Unit Surplus/ Deficit	Land Area (Gross ha)
	A	B	C = A + B	D	E	F = D * E	G = D - F	H = C - G	
Perth	360	1,770	2,130	1,760	25%	440	1,320	810	30
Almonte	940	1,590	2,530	3,160	15%	470	2,690	- 160	-6
Carleton Place	1,560	1,870	3,430	4,340	20%	870	3,470	- 40	-2
	2,860	5,230	8,090	9,260		1,780	7,480	610	22

Source: Watson & Associates Economists Ltd., 2024.



5.2 Lanark County – Employment Areas

5.2.1 *Vacant Employment Land Supply*

Figure 5-6 provides details of Lanark County’s vacant supply of land within Employment Areas (as of mid-2024) by urban municipality. For the purposes of this study, to be consistent with PPS 2024 definition of Employment Areas, only industrial designated lands are considered in the analysis. Other employment designations such as ‘Commercial’ or ‘Business Park’ are not included in the supply and land needs analysis.

As illustrated in Figure 5-6, Lanark County has a total of approximately 89 gross ha of vacant employment land. In accordance with the need for internal infrastructure such as roads, stormwater ponds, easements, etc., a gross-to-net adjustment of 75% was utilized to determine the net vacant Employment Area lands. Adjusting for internal infrastructure, Lanark County’s designated vacant urban Employment Area land supply is estimated at approximately 72 net ha. Further to this, a land vacancy adjustment of 15% was applied to the net vacant land supply to account for lands that may not develop over the planning horizon for various factors such as marketability, site constraints, parcel configuration, landowner willingness, etc. Accounting for these adjustments, the net vacant Employment Area supply in Lanark County is estimated at 61 net ha.



Figure 5-6
Lanark County
Gross and Net Vacant Employment Area Land Supply, 2024

Area Municipality	Total Gross Land Area Adjusted for Environmental Constraints	Adjustment for Roads and Other Internal Infrastructure ^[1]	Net Developable Employment Land Supply	Net Developable Employment Land with Vacancy Adjustment ^[2]
	(A)	(B)	(C = A – B)	(D = C*0.85)
Carleton Place	18	3	15	13
Mississippi Mills	20	4	16	13
Perth	52	11	41	35
Lanark County – Urban	89	17	72	61

^[1] A downward adjustment of 25% of the gross area (after environmental take-outs) has been applied to account for internal infrastructure on parcels greater than 4 ha.

^[2] Assumes a land vacancy adjustment of 15%.

Source: Watson & Associates Economists Ltd.

5.2.2 Underutilized Employment Lands

Lanark County’s urban areas have several established Employment Areas, which provide opportunities for industrial intensification over the long term. Intensification can take on several forms, including the development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of occupied sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization resulting in higher employment density in existing Employment Areas. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g., roads, water/sewer servicing), resulting in communities that are more functional and complete.

Identifying and evaluating intensification opportunities against market demand is challenging. The intensification potential of the underutilized industrial lands will largely be determined by future development plans of existing or future landowners, which is highly speculative. Between 2019 to 2023, Mississippi Mills and Carleton Place have experienced strong development activity in expansions/additions on Employment Area lands, comprising close to 20% of total non-residential building activity.



Infill and redevelopment of existing developed lands are expected to continue to remain strong over time, largely driven by rising industrial land values and the continued buildout of the County's designated Employment Areas. Based on recent trends in intensification and the likely redevelopment of intensification opportunities identified, it is anticipated that 15 to 20% of Lanark's employment growth on Employment Area lands over the 2024 to 2051 period will be accommodated through intensification (varying by Area Municipality). This assumption is reflected in the Employment Area land needs analysis presented in the following subsection.

5.2.3 Employment Area Land Needs, 2024 to 2051

Employment Areas accommodate primarily export-based employment, including a wide range of industrial uses (e.g., manufacturing, distribution/logistics, transportation services), as well as limited ancillary or supporting population-related uses (e.g., office, services, ancillary/accessory retail). In contrast to other urban land uses (e.g., commercial and mixed-use areas), Employment Areas provide an opportunity to accommodate export-based employment sectors that cannot be easily accommodated in other areas of the County. To remain competitive and attractive to a broad range of industrial and commercial sectors, the County needs to ensure that it has a sufficient supply and market choice of serviced Employment Areas. Most notably, this should include medium to larger sites with good regional transportation access.

When considering the anticipated Employment Area land needs within Lanark County's urban areas, regard should be given to the following:

- Long-term employment land employment growth potential;
- Forecast employment density assumptions (i.e., employees/net ha or acre) in Employment Areas;
- Trends in forecast Employment Area absorption; and
- The amount of vacant, developable land within Employment Areas across Lanark County.

Figure 5-7 summarizes Lanark County's urban Employment Area forecast from 2024 to 2051. Over the long-term planning horizon, these Employment Areas are anticipated to accommodate approximately 1,120 jobs which is about 11% of overall employment growth within the County. Urban Employment Areas within the County are expected to



accommodate 65% of County-wide industrial employment.^[46] For detailed information about the employment forecast, broken down by sector, please refer to Appendix B.

Figure 5-7
Lanark County
Employment Growth on Employment (Industrial) Lands, 2024 to 2051

Development Location	Employment on Employment Lands			
	Industrial	Commercial ¹	Institutional ¹	Total
Perth	400	15	0	415
Almonte - Mississippi Mills -	340	40	0	380
Carleton Place	290	35	0	325
Total – Lanark County	1,030	90	0	1,120

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

¹ Commercial and institutional jobs are assumed to be ancillary to industrial uses and not standalone commercial/institutional, in line with the PPS, 2024 definition of Employment Areas.

Source: Watson & Associates Economists Ltd.

Figure 5-7 summarizes forecast Employment Area land needs for Lanark County over the long-term planning horizon. As discussed previously, the forecast assumes that 15 to 20% of job growth within Employment Areas will be achieved through intensification. For the job growth on vacant Employment Area lands, an average target density of 15 jobs per net ha for Almonte and Perth has been assumed, while an average density of 20 jobs per net ha has been utilized for Carleton Place. Between 2024 and 2051, Lanark County is forecast to experience a total land demand of 58 net ha (143 net acres).

In accordance with the County’s supply of designated, developable vacant urban Employment Areas and forecast demand for these lands, a small surplus of 11 net ha has been identified by 2051 in Perth, it has been estimated that the vacant urban Employment Lands in Carleton Place will be built out by 2051. For Almonte in Mississippi Mills, a deficit of nine net ha or 12 gross ha has been identified by 2051.

^[46] Noting that only three of the eight area municipalities in the County have urban Employment Areas.



Furthermore, the municipality is forecast to experience a slight Employment Area deficit of approximately two net ha by 2044, which would indicate that the municipality does not have sufficient land to satisfy the 20-year minimum PPS requirement. With that being said, this deficit represents a small land area, particularly as it relates to Employment Areas and does not require immediate action. It is recommended that this employment land supply be reevaluated through the County's next CR process.



Figure 5-8
Lanark County
Forecast Employment Area Land Needs (Demand vs. Supply), 2024 to 2051

Development Location	Vacant Employment Land Supply (Net Ha Adjusted for Land Vacancy)	Total Employment Forecast on Employment Lands	Forecast Employment Accommodated through Intensification	Total Jobs Less Intensification	Jobs per net ha	Land Demand (net ha)	Deficit/Surplus
	A	B	C	D = (1-C) * B	E	F = D / E	G = A - F
Perth - Industrial	35	415	15%	355	15	24	11
Almonte - Mississippi Mills - Industrial	13	380	15%	320	15	22	-9
Carleton Place - Industrial	13	325	20%	260	20	13	0
Total	61	1,120		935		58	2

Note: Figures have been rounded and may not add up precisely.
Source: Watson & Associates Economists Ltd.



5.3 Conclusions

This chapter provides an evaluation of Lanark County's urban land requirements through 2051, in accordance with the PPS, 2024. The findings indicate that the County has enough designated land within its urban Settlement Areas to meet housing demand over the next 27 years at a County-wide level. However, at the area municipal level, Perth is projected to have a surplus of designated urban land, while Almonte and Carleton Place are expected to face residential deficits of six ha and two ha, respectively. Given that the minimum 20-year requirement for residential urban land to accommodate growth has been satisfied through this study, it is recommended that the County continue to monitor residential and employment growth, as well as land absorption, to maintain a sufficient supply of urban land to meet both short-term and long-term demand. Further to this, the County and its area municipalities could undertake a formal intensification review, to determine the appropriateness of the targets identified herein.

By 2051, Perth is projected to have a small surplus of 11 net ha of vacant urban Employment Areas, while Carleton Place is expected to be fully built out of its employment lands. In Almonte, Mississippi Mills, there is a forecast deficit of nine net ha (12 gross ha) by 2051. Given the minor nature of the shortfall in 2044 (20-year requirement) and 2051, immediate action is not required. A re-evaluation of the employment land supply is recommended during the County's next CR process.



Chapter 6

Policy Recommendations



6. Policy Recommendations

6.1 Introduction

This study has highlighted key themes related to growth and change agents that have implications for the future of land use planning for the County over the next three decades. A number of broader strategic recommendations are provided below which relate to the long-term management of growth, and urban and rural development within Lanark County. These high-level recommendations are intended to inform the County's next OP review and ongoing efforts concerning growth management. These strategic recommendations are provided within the context of an evolving provincial, regional, and local planning policy framework.

6.2 Policy Recommendations – Residential Growth

6.2.1 *Maintain a Distinct Settlement Area Structure*

Opportunities and Challenges

The Settlement Area structure established by the County's OP contributes to the responsible, coordinated and efficient management of land and resources. Settlement Areas, in accordance with the PPS 2024, shall be the focus of growth and development and are planned to provide a range and mix of housing options, jobs, and amenities.^[47] Settlement Areas often serve as clusters of economic activity and therefore are critical to the long-term economic prosperity of communities. Municipal sewage services and municipal water services are the preferred forms of servicing for settlement areas to support the protection of the environment and minimize potential risks to human health and safety.^[48]

^[47] PPS, 2024, Section 2.3.1.

^[48] PPS, 2024, Section 3.6.2. It is noted that municipal sewage systems and municipal water services include both centralized servicing systems and decentralized servicing systems.



Establishing a clear Settlement Area structure allows the County to direct growth to where it can be efficiently serviced with municipal infrastructure and municipal services while developing complete communities

. The Settlement Area structure also ensures that the County can protect valuable agricultural resources and natural heritage systems by limiting growth outside of the Settlement Areas.

Focusing growth and development into Settlement Areas can also encourage the development of a greater range and mix of housing options while contributing to improved economic opportunity for residents. Encouraging the further growth of Settlement Areas can support the provision of neighbourhoods that offer a mix of uses, public services, amenities, jobs, transportation options, and opportunities for people of all ages and abilities, which collectively represent a complete community.

Recommended Policy Directions

- Identify a hierarchy of Settlement Areas and land use designations. Settlement Areas are encouraged to include areas that are planned to provide full or partial services, whereas rural areas do not currently or are not planned to have servicing infrastructure. Full municipal servicing is the preferred form of servicing for Settlement Areas
- Future growth within the County will occur in accordance with a hierarchy of Settlement Areas and land use appropriate designations. This policy framework advances principles of good planning by directing future development to the Settlement Areas and rural areas, thereby optimizing existing infrastructure, creating compact, complete and resilient communities and protecting natural heritage resources and agricultural land.
- In accordance with the growth projections for each area municipality, policies of the Lanark County OP may also include more specific growth projections for the Settlement Areas and rural areas outside of Settlement Areas.
- More modest growth may be planned for in the Settlement Areas with partial servicing and rural areas of the County, provided the policy framework is consistent with Provincial policy regarding the provision of servicing and protection of natural heritage and agricultural lands. Large-scale residential development within rural areas of the County should not be contemplated by policies of the County's OP



- The County's OP should contemplate policy direction to area municipalities that encourage land use structures that optimize existing infrastructure, creating compact, complete and resilient communities, providing a range of housing options, and protecting natural heritage resources and agricultural land.
- Settlement Area land use designations established by in County's OP should be appropriately flexible to not only achieve desirable intensification and density targets to make efficient use of land and resources, but to achieve greater housing and economic options, and to optimise existing or planned infrastructure.
- The County is experiencing growth pressures and an appreciating housing market that is becoming unaffordable for some residents. The County's OP may contemplate a policy framework that establishes a range of enabling policies that aim to increase the supply and mix of homes while reducing cost-related barriers to housing.
- Directing future growth to Settlement Areas can contribute to the viability of implementing other planning tools that will advance the land use planning priorities of the County and municipalities. This may include, for example, the Community Planning Permit System, Community Benefit Charge, Inclusionary Zoning, Community Improvement Plans, and pre-zoning.

6.2.2 Plan for Population Growth

Opportunities and Challenges

Planning for population growth enables the County and members of the community to understand where and how growth will occur. It also enables municipalities to responsibly plan for and manage the necessary servicing and infrastructure needs of the community. This includes planning for the construction of water and wastewater infrastructure, roads, schools, and parks, among other important community assets.

Lanark County is forecast to experience population growth in all area municipalities over the planning horizon. Planning for this growth is an important function of the County under the Provincial land use planning framework. The County's OP will have a critical role in directing where and how growth will occur by establishing a policy framework that is consistent with the PPS while enabling responsible management of growth over the planning horizon.



Recommended Policy Directions

- Establish policies that are considerate of a range of planning tools to facilitate, encourage and advance desirable planning outcomes, such as ‘housing first’ policies.
- While population and employment growth will largely be directed to the County’s Settlement Areas, it is recognized that the County’s rural areas have a role to play in accommodating limited, small-scale residential growth and sustainable economic development.
- Where the GMS has identified rural population growth, policies of the Lanark County OP will need to be consistent with Provincial policy regarding the provision of unjustified and/or uneconomical expansion of infrastructure while establishing a clear policy framework for how and where growth will occur.
- In accordance with the findings of the GMS, municipalities will need to ensure that an appropriate amount of land supply is available to accommodate projected residential growth over the planning horizon. Phasing policies and municipal servicing plans may need to be undertaken to ensure that servicing of future development is being responsibly allocated in this regard. Further to this, it is recommended that a detailed study of intensification opportunities be undertaken in Settlement Areas will full municipal servicing.
- Where the Province has issued Minister’s Zoning Orders, these do not contribute to the achievement of growth forecasts and targets. Policies should be considered for the County OP that ensure this distinction is maintained.

6.2.3 Update County-Wide Housing Projections

Opportunities and Challenges

The PPS 2024 provides direction to municipalities to ensure that there is sufficient land designated to accommodate forecast growth in the near and long term. Sufficient land for an appropriate range and mix of uses must be made available to meet projected residential needs for at least 20 years, but no more than 30 years. Municipalities must also maintain at all times the ability to accommodate residential growth for a minimum of 15 years. Lands that are available and serviced by municipal services must be available to satisfy at least three years of expected residential growth. The PPS 2024 also requires municipalities to establish minimum targets for the provision of affordable



housing, to permit and facilitate all housing options and all types of residential intensification.

While the area municipalities in the County are required to provide adequate land to accommodate housing forecasts, it is somewhat at the discretion of the County to determine what types of housing will be provided. The County may forecast for a larger portion of housing growth to be accommodated by higher-density housing types, like low- and medium-rise apartments, or through less dense forms such as single-detached houses. The County is also empowered to set targets regarding what proportion of new housing should be affordable, housing for seniors, and new housing that is built where housing already exists as intensification.

Providing a range of housing options relates to provincial policies and can help satisfy the demand for different households in the future that may not have their housing needs met now. In addition to forecasting the total number of new residential units needed, the County OP can include targets for affordable housing, housing for seniors, housing to be developed through intensification, and housing to be developed in greenfield areas. The PPS requires the establishment of affordable housing.

Recommended Policy Directions

- The County's OP shall implement a minimum target for the provision of affordable housing. The Municipal Tools to Support Affordable Housing Report recommends establishing a target of at least 25% of new housing to be affordable housing. This is in relation to the Province's definition of what is affordable housing.
- The County's in-effect OP establishes specific housing projections for each of the municipalities based on a previous forecast exercise. The County OP policies regarding housing forecasts must therefore be updated to show forecast housing growth over the planning horizon as determined through this GMS
- Housing policies need to emphasize market choice of housing options and should establish direction with respect to prioritizing where housing growth should occur.
- The PPS, 2024 also requires planning authorities to maintain 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.



- The County’s OP will need to be consistent with the PPS, 2024 in regard to establishing direction that municipalities maintain at all times the ability to accommodate residential growth for a minimum of 15 years through residential intensification and redevelopment, and if necessary, lands which are designated and available for residential development.
- While there are minor residential deficits identified for Mississippi Mills and Carleton Place within the 30-year planning horizon, both have a sufficient amount of land to accommodate the 20-year minimum requirement. Because this minimum requirement is satisfied, the County can continue to monitor the availability of vacant residential land, ensuring that the 20-year minimum is met.
- A refined policy framework may be developed to provide continued direction to area municipalities to establish OP policies that encourage a range of housing types, densities and options in consideration of the updated housing projections to the year 2051. A refined policy framework should contemplate a broad range of policy options to increase the supply and mix of homes within the County.
- The existing policy framework established by the Lanark County OP regarding affordable housing may be updated to be consistent with the PPS, 2024. This includes an approach that is ‘market-based’ and establishes minimum targets for housing that are affordable to low- and moderate-income households, as well as establishing a clear definition of “affordable” that is consistent with the PPS, 2024.
- Housing growth within the County will need to be predicated on existing or planned servicing capacity at the local municipal level. This may require municipalities to coordinate land uses and infrastructure requirements through the phasing and staging of development. This contributes to growth occurring in a coordinated and orderly manner that is consistent with existing or planned servicing and infrastructure within areas of the County that are designated for development.

6.2.4 Promote and Plan for Residential Intensification

Opportunities and Challenges

Measured intensification maximizes the use of existing urban infrastructure and services by increasing the density of development in established areas, thereby reducing the potential need to expand the Settlement Areas outward. Furthermore, intensification builds compact development patterns that can provide a range of housing options that



are accessible to amenities and improve climate resilience by building housing that is more energy efficient (multiple dwelling unit structures are generally more energy efficient than single detached housing unit structures).

It is important not to oversimplify the benefits of intensification. Accommodating too much intensification or focusing on growth only through intensification may pose challenges, as the local municipalities within the County may be required to upgrade and replace infrastructure (e.g., bigger water mains and trunk sewers) prior to its identified useful life, which can have significant financial implications. Furthermore, considering the range of demographic groups attracted to the County and its local municipalities (i.e., young adults, families with children, empty nesters, and seniors), the County is anticipated to need to accommodate a variety of housing options by structure type, tenure (i.e., ownership and rental), and location.

To effectively accommodate the forecast housing demand for this area, the County will need to plan for an appropriate balance of housing options within both intensification and greenfield areas which aligns with anticipated market demand. Accordingly, the County and its local municipalities should plan for intensification that considers a range of factors, including servicing requirements and market demand.

Recommended Policy Directions

- The County's OP should contemplate policy direction to area municipalities that encourage the establishment of Strategic Growth Areas. Strategic Growth Areas are intended to focus growth and intensification and are places where a municipality intends to prioritize planning and investment for infrastructure and public service facilities.
- The County's OP should establish a minimum intensification target of 15% in municipalities with fully serviced Settlement Areas. It is further recommended that area municipalities should develop detailed intensification strategies to finalize the local intensification targets.
- For partially serviced Settlement Areas, it is recommended that area municipalities identify appropriate intensification opportunities based on an assessment of local demand and supply conditions.
- The County's OP may establish policies that direct area municipalities to develop an intensification strategy that may serve as an update to the GMS and the



County's OP The intensification strategies should be implemented through local planning processes, including OP and zoning by-law review processes.

- Intensification strategies should also be considerate of Provincial policy by contemplating a range of housing options, specifically in regard to providing for an appropriate range and mix of housing options and densities to meet projected market-based and affordable housing needs of current and future residents of the regional market area.
- The GMS identifies projected population and housing growth forecasts to the year 2051. Policies of the County's OP should provide more specific direction to area municipalities regarding achieving minimum densities to ensure appropriate accommodation of residential growth over the long-term planning horizon. This may include specific housing unit targets as identified by the GMS that require the development of a range of housing typologies and tenures.
- Enabling policies of the County's OP may establish a framework for municipal intensification strategies to facilitate appropriate intensification and infill through various planning tools, such as: permitting a broader range of housing types that are responsive to market demand; exploring opportunities to bring certainty and some flexibility to the development approval process (such as the Community Planning Permit System); the administration of financial incentives to advance the goals and objective of local OPs (such as Community Improvement Plans), as well as other planning tools with similar objectives; and disposing of surplus public land for the purpose of housing, including affordable/attainable housing.
- Enabling policies in the County's OP to permit up to two additional residential units on lots containing single detached, semi-detached and rowhouse dwellings, in accordance with the Planning Act.
- Intensification and infill within the County that are considerate of the existing character of the Settlement Areas may be desirable. Local municipalities may consider the development of design guidelines that encourage land use compatibility between different dwelling typologies, existing and new community areas, as well as transitioning between lower-, medium- and higher-density built forms will contribute to achieving appropriate intensification and infill developments.



6.2.5 Responsibly Manage Municipal Servicing Infrastructure

Opportunities and Challenges

Growth management requires that municipalities plan to provide municipal services and adequate infrastructure to support forecast growth over the planning horizon.

Responsible planning for infrastructure growth contributes to building sustainable, resilient, efficient and complete communities in a financially responsible manner. The GMS has identified that the County will experience growth throughout the planning horizon, which may require the development and/or maintenance of servicing capacity within some municipalities. The County's OP will therefore need to establish policies that provide direction to area municipalities regarding the provision of available and planned servicing to accommodate future growth through an efficient and sustainable framework.

Planning for infrastructure requires a balance. Creating an oversupply of infrastructure can result in a cost burden to maintain infrastructure and services that are not fully utilized or funded. Whereas not developing enough servicing infrastructure may constrain growth and/or limit opportunities for growth. The findings of the GMS are an important tool that can be used by the County and the area municipalities in planning for servicing infrastructure in a way that can support growth in a fiscally responsible manner.

Recommended Policy Directions

- Policies of the County's OP should continue to direct growth in a planned, orderly and phased manner to ensure existing or new infrastructure and services are sufficient to meet the forecast growth needs of municipalities as identified through the County's OP
- The Municipal Act allows municipalities to allocate servicing capacity based on geography. The County should consider enabling policies for by-laws that regulate the allocation of servicing capacity to be consistent with where infrastructure is planned or is feasible.
- The phasing and staging of future development within Settlement Areas is required to be predicated based on existing or planned municipal infrastructure servicing capacities. Policies of the County's OP should provide direction to



develop multi-year municipal-led servicing plans as a component of local official plan review processes based on the County's growth management work.

- Consistent with Provincial policy, the County's OP should continue to direct growth to areas where full municipal servicing or communal servicing systems are available and where there is capacity.
- Growth in areas where only partial or individual on-site servicing is available should only be permitted in certain land use designations and/or for certain permitted uses. Otherwise, partial or individual on-site servicing should generally be limited or restricted under the policies of the County's OP
- The County will need to continually monitor, evaluate and coordinate with area municipalities to ensure that sufficient municipal servicing infrastructure within the urban communities is available, or planned for, in order to support the growth objectives of the County's OP and that there is servicing capacity to accommodate this growth, including development through intensification and infill.
- Policies of the County's OP should continue to provide direction for the eventual availability of full municipal services in all urban communities as the preferred method of infrastructure and servicing.
- For rural area municipalities that are forecast to realize relatively slower growth, policies of the Lanark County OP may provide direction to ensure existing municipal infrastructure is sustainable and resilient over the long-term planning horizon.
- The Province requires that municipal servicing be provided in a manner that is sustainable, recognizes the impacts of climate change, is feasible and financially viable, and protects human health, safety and the natural environment.

6.2.6 Develop a Robust Plan Monitoring and Evaluation Framework

Opportunities and Challenges

The growth forecast provided herein is based on the best available information today. Changes to the global economy (such as a pandemic or recession), as well as demographic considerations (such as the recently reduced Federal immigration targets), can have an unforeseen impact on the County's growth outlook. With this in mind, forecasts may need to be adjusted to accommodate changes in growth or deviations in the development of services. Without monitoring, there is no way to determine if the objectives and targets of the plan are being met. Plan monitoring and evaluation



provides a critical feedback loop to municipalities, enabling them to confirm whether or not objectives are being met, and respond to changes in the growth forecast over the planning horizon.

The County has an important role in implementing a robust plan monitoring and evaluation framework that evaluates key performance indicators to track growth management-related objectives. Such a framework can help identify if growth and intensification targets are being met and if municipal infrastructure is being developed in a responsible and responsive manner to accommodate growth.

Recommended Policy Directions

- Establish a plan monitoring and evaluation framework that regularly evaluates the forecasts of the GMS given the dynamic nature of the County's population growth and demographics. Any growth management exercise undertaken by the County should be conducted in consultation with area municipalities.
- Data gathering should include key performance metrics such as market demand, land supply (in all stages of approvals) and development information (such as lot creation, housing typology, location and tenure).
- Policies establishing direction for regular plan monitoring and evaluation may include a robust framework that enables the County and area municipalities to modify growth objectives based on actual supply and demand data, while contemplating a range of planning policy, demographic and economic factors that influence growth and change over the long-term planning horizon.
- Policies of the Lanark County OP may establish a clearer framework for land use data management and sharing between the County and area municipalities. This may include policy direction to develop a robust data management infrastructure and to ensure the nature of data being collected is consistent among municipalities.
- Collaborate with appropriate Lanark County departments and provide information and outputs associated with the plan monitoring and evaluation framework. This information may be used to inform other County initiatives and advance associated priorities. The plan monitoring and evaluation framework may provide data that can be used to analyze demographics, market rents and affordability or attainability, inform a broader understanding of housing needs within the County.



6.3 Policy Recommendations – Non-Residential Growth

6.3.1 *Plan for Future Employment Area Lands Development and Strategically Plan New Employment Areas*

Opportunities and Challenges

Employment Areas form a vital component of the County's land use structure and are an integral part of the local economic development potential of the County. Through the development of its Employment Area land base, Lanark County is better positioned to build more balanced, complete, and competitive communities. Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the County.

It is critical that Employment Areas and other urban non-residential lands are planned in a manner that aims to promote economic competitiveness, attract employment growth, and maximize employment density and land utilization, where appropriate. Phasing policies should also be explored that require the servicing of greenfield employment lands to be completed prior to, or in parallel with, the servicing and development of the County's identified Employment Area expansion lands.

Recommended Policy Directions

- The County including the Town of Mississippi Mills should continue to plan for the phased development of the Town's designated employment area and future employment area expansion lands.
- Monitor the supply of designated employment lands within the Almonte Settlement Area and evaluate the need for an urban boundary expansion through the County's next CR process.
- The precise delineation of the Settlement Area boundary expansions may occur through the County's OP Review in consultation with the local municipality while being consistent with the PPS requirements.



6.3.2 Plan for Employment Uses Under a New Provincial Policy Framework

Opportunities and Challenges

As previously noted, the PPS, 2024 includes an updated definition of Employment Area based on the amendment of the Planning Act on June 8, 2023. The Planning Act was amended under subsection 1 (1) to include a new definition of “area of employment.” This definition of Employment Area has been scoped to include only industrial-type employment as a primary use. The amendment to the Planning Act received Royal Assent as part of Bill 97 on June 8, 2023. The definition change in the Planning Act is now in effect in concert with the PPS, 2024.

Under the new definition of Employment Area as per the PPS, 2024, municipalities are required to plan for, and protect, industrial uses based on a more narrowly scoped definition of Employment Area and are limited to these uses that are primarily industrial in nature or other uses associated or ancillary to the primary use. Lands that do not meet the Employment Area definition would not be subject to provincial Employment Area protection policies and would allow for opportunities for residential and other non-employment uses.^[49]

In light of the definition change of Employment Area, a key concern for municipalities will be their ability to provide an urban structure that will support employment uses outside of Employment Areas, particularly non-retail commercial and institutional uses (e.g., office uses, training and education, entertainment, wholesale trade, and service repair centres). Traditionally, Employment Areas have been regarded as areas protected for key targeted employment sectors, especially those in the export-based sectors.

It is important to recognize that the definition change may result in already developed Employment Area lands not meeting the definition. Based on the emphasis found in the PPS, 2024 for supporting mixed uses, going forward, municipalities will need to assess whether existing Employment Areas meet the new provincial definition and identify areas that should transition into mixed-use areas.

^[49]PPS, 2024, definitions, p. 34.



Based on the current County and local OP policies, a wide range of uses including offices, and business services uses, are permitted within the Employment Area / Business Park designation. For the purposes of policy consistency, lands that do not meet the updated definition of Employment Area should be reviewed and potentially reclassified from future protected Employment Areas.

Recommended Policy Directions

- That the County and local municipalities revise the definition of Employment Area in the OP to align with the definition provided in the PPS, 2024. This alignment will ensure consistency and clarity in the interpretation and application of Employment Area policies.
- As part of updating the OP, the County reviews established areas designated as “Urban Employment / Industrial” and “Rural Industrial” to determine if these areas meet the Employment Area definition in the PPS, 2024, and identify policy provisions, if required.

6.3.3 Protect Employment Areas

Opportunities and Challenges

It is recognized that the County’s Employment Areas are an integral part of Lanark County’s economic growth potential. For the County to achieve its long-term economic development goals, Employment Areas need to continue to offer opportunities for growth and development. This includes accommodating a large share of the County’s employment growth, across a broad range of industry sectors.

Given the potential negative impacts resulting from the inappropriate conversion of Employment Areas, it is recognized that there is a need to preserve such designated lands within Lanark for employment uses. It is also recognized that under some circumstances, an Employment Area conversion may be justified for planning and economic reasons, provided such decisions are made using a systematic approach and methodology, as set out herein.

Under the PPS, 2024, municipalities are provided with greater control over Employment Area conversions (now referred to as Employment Area removals) with the ability to remove lands from Employment Areas at any time. Previously, under the PPS, 2020, municipalities were required to review changes to designated Employment Areas during a Comprehensive Review. Under the PPS, 2024, there is a requirement to demonstrate



that there is an identified need for the removal and the land is not required for Employment Area uses over the long term. Furthermore, the Employment Area removal requires consideration of the impact of the produced use on the function of the Employment Area and whether existing infrastructure and public facilities can accommodate the proposed use.^[50]

Recommended Policy Direction

- That Lanark County develop criteria for evaluating conversion requests for the re-designation of Employment Area lands. This will ensure that any proposed conversions are thoroughly assessed and justified, protecting the County's Employment Area land supply. Additionally, the County should implement measures to actively protect Employment Area lands from conversion to non-employment uses. This proactive approach will safeguard the County's capacity to meet long-term Employment Area land needs and support future job growth.
- Protect the County's Employment Areas to ensure that the lands in such areas are not eroded and the planned function of these areas is not undermined, in order to remain competitive over the long term. Both occupied and vacant Employment Area land supply, including underutilized lands, play a role in the urban community's competitiveness and should be protected.
- Continue to explore opportunities to expedite the servicing of designated Employment Areas through infrastructure projects.
- Ensure that a minimum five-year supply of serviced Employment Areas is maintained and available at all times to meet market needs.
- Develop a proactive approach to work with landowners to increase the number of sites that are "market ready." Market-ready sites are lands that are not only vacant and serviced but have landowner intent to progress the lands for entry into the market. There are a number of reasons why lands may not be market-ready; for example, the landowner may not be willing or ready to sell the land or may be holding on to the land for future development/expansion. Lanark County is encouraged to consult with landowners to understand the opportunities and limitations of market-ready lands and identify strategies to address potential barriers to investment.

^[50] Proposed PPS, 2024, policy 2.8.2.4, p. 12.



- Identify and prioritize opportunities for “quality of life enhancements” to strengthen the competitiveness and attractiveness of Employment Areas. In addition to promoting a range of employment-supportive uses in Employment Areas, Lanark County is encouraged to develop priorities for making physical improvements to existing Employment Areas, where the need for such enhancements is identified. This could include opportunities to add or enhance existing elements, where appropriate and feasible, such as open space/public realm improvements, lighting, wayfinding/branding, trails, active transportation connections, transit access, and other types of hard infrastructure which help to make Employment Areas attractive places to work. Opportunities identified through this process could be incorporated into updated urban design policies for the County’s Employment Areas.

6.3.4 Explore Opportunities for Intensification of Urban Employment Lands

Opportunities and Challenges

Future redevelopment, expansion, and infill opportunities will continue to exist as the County’s Employment Areas mature and evolve. Intensification potential on occupied and underutilized employment lands is not well understood given uncertainties regarding the future intentions of existing landowners. Section 2.8.1 (d) of the PPS, 2024 encourages intensification of employment uses and compatible, compact, mixed-use development to support the achievement of complete communities.

Recommended Policy Direction

- In accordance with subsection 5.2.3., the County should establish a minimum intensification target of 15% of all urban Employment Area growth to be achieved through intensification.
- Encourage the Development and Intensification of Underutilized Employment Areas
- Promote and facilitate intensification/infill opportunities in existing Employment Areas.
- Explore opportunities for infill and redevelopment in mature industrial areas.
- Work with landowners of large infill or redevelopment sites to assess interest in developing the lands and assess the feasibility of development.



- Explore redevelopment opportunities on brownfield industrial sites.

6.3.5 Identifying Employment Opportunities for Dry Industrial Uses

Opportunities and Challenges

Dry industrial lands include lands that do not function as fully serviced sites but can accommodate a variety of employment land uses that do not require municipal wastewater infrastructure. At both the County and local levels, location requirements of industry can vary considerably depending on the nature of the employment sector/use.

In the event of a lack of dry employment lands, there is the risk that industries with low employment yields (such as truck parking or lay-down yards) locate within rural areas or absorb urban employment land, which should ideally accommodate industries that require services and generate greater employment yields.

Recommended Policy Direction

- It is important that the County and its area municipalities continue to identify and provide opportunities for operations to be located on dry employment lands through appropriate zoning. Locations where clusters of dry industrial development already exist should be prioritized over the establishment of new areas.
- Further to the above, the County should be mindful to not encourage dry industrial development throughout the County, potentially leading to unwanted road utilization and traffic. Consideration should be given to locations with proximity to interchanges, reducing the flow of traffic on local roads.
- By directing dry industrial uses to appropriate locations through zoning, the municipality can optimize land use, protect rural areas, and ensure the efficient use of municipal infrastructure.

6.3.6 Conduct a Commercial Land Needs Study that Specifically Addresses the County's Retail Requirements and Commercial Structure

Opportunities and Challenges

Through the GMS exercise, the focus has been directed to residential growth within the County's urban communities as well as a focus on development within the County's



urban industrial lands. Further analysis could be conducted to determine the County's retail requirements and commercial structure.

Recommended Policy Direction

- To better understand these gaps, a commercial land needs study could be undertaken.
- The results of a commercial land needs study would provide the County with sufficient background to plan for a range of non-residential uses.

6.3.7 Encourage Eco-Industrial Development Approaches to Employment Lands Development and Strengthen Policies for Climate Change Adaptation

Opportunities and Challenges

As Lanark County continues to grow and develop, it is important to take measures to limit local climate change impacts. Sustainability and climate change impact have been identified as key priorities for the County. Across North America, there are numerous examples where municipalities have developed eco-industrial development approaches or sustainable economic development initiatives in Employment Areas. Industrial development that follows eco-industrial principles generally is based on reducing the environmental impact footprint through urban design and sustainable design principles and/or embraces a triple-bottom-line profit business model for development.

Recommended Policy Direction

- Continue to support innovative and sustainable buildings that incorporate green building design standards such as Leadership in Energy and Environmental Design and include sustainable building features such as green roofs and solar panels.
- Consider including policies for eco-business zones in the County's SCOP update. Eco-business zones are areas of employment and/or industrial activity that promote environmental quality, economic vitality, and social benefits through the continuum of planning, design, construction, long-term operations, and deconstruction. There is an opportunity to explore this concept with eco-business principles.



- Explore opportunities to attract investment in renewable energy systems (e.g., geothermal, district energy) in Employment Areas.

6.3.8 Identifying Employment Opportunities in the Rural Area

Opportunities and Challenges

Industrial designated lands outside of Settlement Area boundaries are identified as rural industrial. It is recognized that the County's rural area is an important asset for the County. The proposed PPS, 2024 identifies that development within rural areas needs to be assessed within the rural context in terms of the scale of servicing and character.^[51] No further direction is provided with respect to development within existing or new rural Employment Areas.

Recommended Policy Direction

- That through its OP identify appropriate locations for rural employment areas and review the range of permitted industrial uses that don't require municipally serviced sites within the Rural Areas. These uses can include resource extraction and processing, light manufacturing, logistics, agribusiness services, and renewable energy production.
- That Lanark County introduce a minimum lot frontage requirement (e.g., 60 metres) for new land divisions within rural industrial areas. This ensures that parcels remain large enough to accommodate various industrial activities while maintaining the rural character and allowing for adequate access.
- That Lanark County implement site plan control requirements for new industrial developments in rural industrial areas. This will ensure that site design, landscaping, and infrastructure are compatible with the rural character and existing services. Provisions should include buffering, setbacks, and access management to minimize conflicts with adjacent land uses, thereby promoting harmonious and sustainable development within rural settings.

^[51] PPS, 2024, policy 2.5.2, p. 10.



Chapter 7

Conclusions



7. Conclusions

This study provides a comprehensive assessment of the County's long-term population, housing and employment growth potential as well as urban land needs to the year 2051. This analysis has been prepared within the context of regional economic conditions and growth drivers as well as County-wide and local development trends.

By 2051, Lanark County's total population base is forecast to grow to approximately 106,600 persons under the reference growth scenario. This represents an increase of approximately 38,400 residents between 2021 and 2051, or an average annual population growth rate of 1.5% during this period. Accommodating the forecast range in population growth across the County will require approximately 16,900 new households or approximately 560 new households annually. For historical context, the County averaged approximately 310 new households annually between 2011 and 2021. To adequately accommodate future housing demand across a diverse selection of demographic and socio-economic groups, a range of new housing typologies will be required with respect to built form, location, and affordability across Lanark County.

The total employment base for Lanark County is forecast to steadily increase to approximately 34,600 jobs by the year 2051. This represents an increase of approximately 11,500 new jobs between 2021 and 2051, or an average annual employment growth rate of 1.4% during this period. Employment growth is anticipated across a variety of export-based employment sectors (e.g., transportation and logistics, wholesale trade, construction, and manufacturing). Job growth potential within population-related employment sectors (including work-at-home employment) such as retail; accommodation and food; professional, scientific and technical services; education; and health care is also anticipated to drive near-term employment growth fueled by steady population growth.

Carleton Place, Mississippi Mills, and Perth are forecast to represent the bulk of the population, housing, and employment growth in the County. With fully serviced urban areas, these municipalities are expected to accommodate a wide range of housing structure types, particularly medium- and high-density households. Considering the demographic profile of Lanark County to 2051, there will be an increasing need for a wider range of housing types, which emphasizes growth within these urban areas. The remaining municipalities in the County will continue to serve an integral role in



facilitating housing development, particularly through low-density dwellings and secondary units.

Employment growth is expected to largely follow these population growth patterns, as a majority of the job forecast represents population-related employment, which is required to serve a growing population. Furthermore, an aging population base requires a greater level of institutional employment in urban areas where future retirement communities and long-term care homes will be situated. Industrial employment is also a vital component of the County's long-term economic outlook and each municipality will play a diverse role in accommodating this growth.

This report evaluates Lanark County's urban land requirements through 2051, aligning with the PPS, 2024. The findings suggest the County has enough designated land within its urban Settlement Areas to meet County-wide housing demand over the next 20 to 30 years. At the municipal level, Perth is expected to have a surplus of designated urban land, while Almonte and Carleton Place may face residential land deficits of six ha and two ha, respectively. Given that the 20-year minimum requirement of the PPS is satisfied, no immediate action is required.

For Employment Areas, Perth is projected to have a small surplus of 11 net ha by 2051, while Carleton Place's employment lands are anticipated to be fully built out. In Almonte, a deficit of nine net ha is expected by 2051, but this shortfall is minor, with no immediate action needed. Continued monitoring of growth and land absorption, as well as re-evaluation during the next CR process, is recommended.

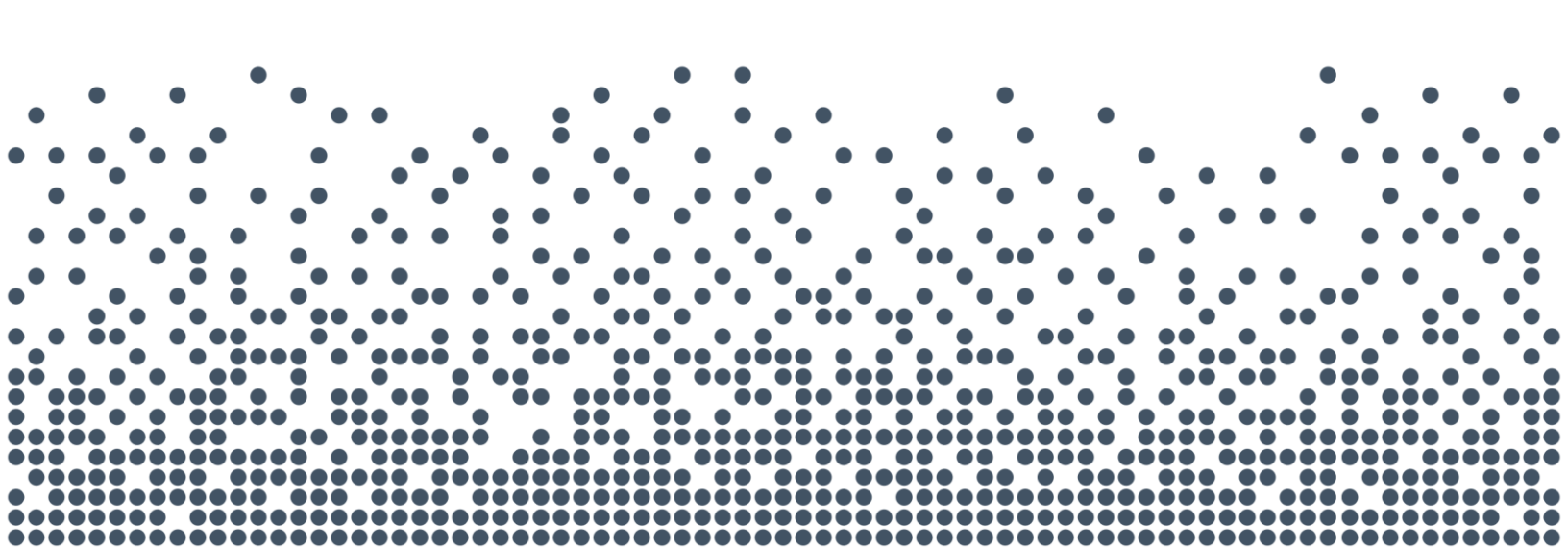
Based on the above technical findings, the following high-level policy recommendations were put forward to guide future OP policy updates for Lanark County:

- Residential Growth
 - Maintain a distinct Settlement Area Structure
 - Plan for Population Growth
 - Update County-Wide Housing Projections
 - Promote and Plan for Residential Intensification
 - Responsibly Manage Municipal Servicing Infrastructure
 - Develop a Robust Plan Monitoring and Evaluation Framework
- Non-Residential Growth
 - Plan for Employment Uses Under a New Provincial Policy Framework



- Plan for Future Employment Area Lands Development and Strategically Plan New Employment Areas
- Protect Employment Areas
- Explore Opportunities for Intensification of urban Employment Lands
- Conduct a Commercial Land Needs Study that Specifically Addresses the County's Retail Requirements and Commercial Structure
- Encourage Eco-Industrial Development Approaches to Employment Lands Development and Strengthen Policies for Climate Change Adaptation
- Identifying Employment Opportunities in the Rural Area

The growth forecast for Lanark County represents a considerable increase in development activity compared to previous decades. Regular monitoring of the County's forecast is recommended to assist the County and its residents in better understanding current real estate development trends and demographic conditions, the progress of current development initiatives, the overall tracking of population and housing growth to OP forecasts/targets, and the influence of OP planning policies on urban development patterns. This analysis will also help the County assess and evaluate broader growth management objectives and performance measures regularly.



Appendices

Appendix A

County-wide Population and Housing Growth Forecast, 2021 to 2051

Appendix A – County-wide Population and Housing Growth Forecast

	Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached	Multiple Dwellings ^[2]	Apartments ^[3]	Total Households	Equivalent Institutional Households	
Historical	Mid 2006	56,390	55,008	1,183	53,825	18,250	1,020	1,855	21,360	1,075	2.58
	Mid 2011	58,120	56,689	1,159	55,530	19,329	1,009	2,018	22,762	1,054	2.49
	Mid 2016	61,430	59,918	1,298	58,620	20,710	1,260	2,130	24,505	1,180	2.45
	Mid 2021	68,180	66,506	1,296	65,210	22,780	1,575	2,770	27,590	1,178	2.41
Forecast	Mid 2026	73,700	71,889	1,497	70,392	25,038	1,879	3,388	30,305	1,361	2.37
	Mid 2031	80,400	78,424	1,747	76,677	26,921	2,238	4,086	33,245	1,588	2.36
	Mid 2036	88,000	85,837	2,007	83,830	28,817	2,739	4,939	36,495	1,825	2.35
	Mid 2041	95,000	92,665	2,327	90,338	30,360	3,334	5,801	39,495	2,115	2.35
	Mid 2046	101,200	98,713	2,623	96,090	31,542	4,001	6,642	42,185	2,385	2.34
	Mid 2051	106,600	103,980	2,918	101,062	32,387	4,693	7,425	44,505	2,653	2.34
Incremental	Mid 2011 - Mid 2016	3,310	3,229	139	3,090	1,381	251	112	1,743	126	
	Mid 2016 - Mid 2021	6,750	6,588	-2	6,590	2,070	315	640	3,085	-2	
	Mid 2021 - Mid 2026	5,520	5,383	201	5,182	2,258	304	618	2,715	183	
	Mid 2021 - Mid 2031	12,220	11,918	451	11,467	4,141	663	1,316	5,655	410	
	Mid 2021 - Mid 2036	19,820	19,331	711	18,620	6,037	1,164	2,169	8,905	647	
	Mid 2021 - Mid 2041	26,820	26,159	1,031	25,128	7,580	1,759	3,031	11,905	937	
	Mid 2021 - Mid 2046	33,020	32,207	1,327	30,880	8,762	2,426	3,872	14,595	1,207	
	Mid 2021 - Mid 2051	38,420	37,474	1,622	35,852	9,607	3,118	4,655	16,915	1,475	

Source: Watson & Associates Economists Ltd., 2024.

^[1] Census undercount estimated at approximately 2.5%. Note: Population including the undercount has been rounded.

^[2] Includes townhouses and apartments in duplexes.

^[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix B

County-wide Employment Growth Forecast, 2024 to 2051

Appendix B1 – County-wide Employment Growth Forecast (Activity Rate)

Period	Activity Rate							
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	Total Including N.F.P.O.W.
Mid 2011	0.006	0.045	0.054	0.093	0.074	0.271	0.057	0.328
Mid 2016	0.004	0.048	0.055	0.105	0.066	0.278	0.065	0.343
Mid 2021	0.004	0.052	0.060	0.098	0.060	0.275	0.064	0.338
Mid 2024	0.004	0.052	0.061	0.098	0.060	0.275	0.064	0.338
Mid 2026	0.004	0.053	0.061	0.097	0.059	0.274	0.063	0.338
Mid 2031	0.004	0.053	0.059	0.095	0.058	0.270	0.063	0.333
Mid 2036	0.004	0.053	0.059	0.094	0.058	0.267	0.063	0.330
Mid 2041	0.004	0.053	0.058	0.093	0.057	0.265	0.063	0.328
Mid 2046	0.004	0.054	0.057	0.092	0.057	0.264	0.063	0.327
Mid 2051	0.004	0.054	0.057	0.091	0.056	0.261	0.063	0.324

^[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.

Source: Watson & Associates Economists Ltd., 2024.

Appendix B2 – County-wide Employment Growth Forecast

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2011	335	2,620	3,128	5,378	4,290	15,750	3,320	19,070
Mid 2016	260	2,920	3,363	6,438	4,085	17,065	3,980	21,045
Mid 2021	287	3,553	4,070	6,715	4,097	18,722	4,340	23,062
Mid 2024	299	3,747	4,343	6,971	4,266	19,626	4,543	24,169
Mid 2026	307	3,877	4,525	7,142	4,378	20,229	4,679	24,908
Mid 2031	327	4,221	4,776	7,670	4,695	21,689	5,096	26,785
Mid 2036	347	4,673	5,160	8,237	5,069	23,486	5,569	29,055
Mid 2041	367	5,064	5,497	8,816	5,453	25,197	6,003	31,200
Mid 2046	387	5,424	5,809	9,300	5,751	26,671	6,385	33,056
Mid 2051	407	5,735	6,055	9,647	6,002	27,846	6,715	34,561
Incremental Change								
Mid 2016 - Mid 2021	135	5,390	-485	-915	-590	3,535	-3,980	-445
Mid 2021 - Mid 2024	12	195	273	256	169	904	203	1,107
Mid 2024 - Mid 2026	8	130	182	171	112	603	136	739
Mid 2024 - Mid 2031	28	474	433	699	429	2,063	553	2,616
Mid 2024 - Mid 2036	48	926	817	1,266	803	3,860	1,026	4,886
Mid 2024 - Mid 2041	68	1,317	1,154	1,845	1,187	5,571	1,460	7,031
Mid 2024 - Mid 2046	88	1,677	1,466	2,329	1,485	7,045	1,842	8,887
Mid 2024 - Mid 2051	108	1,988	1,712	2,676	1,736	8,220	2,172	10,392
Annual Average								
Mid 2021 - Mid 2024	2	39	55	51	34	181	41	221
Mid 2024 - Mid 2026	2	26	36	34	22	121	27	148
Mid 2024 - Mid 2031	3	47	43	70	43	206	55	262
Mid 2024 - Mid 2036	3	62	54	84	54	257	68	326
Mid 2024 - Mid 2041	3	66	58	92	59	279	73	352
Mid 2024 - Mid 2046	4	67	59	93	59	282	74	355
Mid 2024 - Mid 2051	4	66	57	89	58	274	72	346

^[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.

Source: Watson & Associates Economists Ltd., 2024.

Appendix C

Population and Housing Growth Forecast by Local Municipality, 2021 to 2051

Appendix C1 – Township of Beckwith

	Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi- Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other	Total Households	
Historical	Mid 2006	6,650	6,387	12	6,375	2,235	10	10	55	2,310	2.765
	Mid 2011	7,270	6,986	6	6,980	2,408	9	5	149	2,571	2.717
	Mid 2016	7,960	7,644	19	7,625	2,715	10	5	145	2,875	2.659
	Mid 2021	9,250	9,021	21	9,000	3,200	15	10	145	3,370	2.677
	Mid 2024	9,510	9,272	24	9,248	3,324	15	10	145	3,494	2.654
Forecast	Mid 2026	10,000	9,752	24	9,718	3,534	15	10	145	3,704	2.633
	Mid 2031	10,760	10,492	34	10,458	3,824	15	10	145	3,994	2.627
	Mid 2036	11,710	11,422	44	11,368	4,144	25	30	145	4,344	2.629
	Mid 2041	12,500	12,192	54	12,138	4,414	45	50	145	4,654	2.620
	Mid 2046	13,150	12,822	64	12,758	4,624	65	70	145	4,904	2.615
	Mid 2051	13,630	13,292	74	13,218	4,764	75	90	145	5,074	2.620
Incremental	Mid 2006 - Mid 2011	620	599	-6	605	173	-1	-5	94	261	
	Mid 2011 - Mid 2016	690	658	13	645	307	1	0	-4	304	
	Mid 2016 - Mid 2021	1,290	1,377	2	1,375	485	5	5	0	495	
	Mid 2021 - Mid 2024	260	251	3	248	124	0	0	0	124	
	Mid 2024 - Mid 2026	490	480	0	470	210	0	0	0	210	
	Mid 2024 - Mid 2031	1,250	1,220	10	1,210	500	0	0	0	500	
	Mid 2024 - Mid 2036	2,200	2,150	20	2,120	820	10	20	0	850	
	Mid 2024 - Mid 2041	2,990	2,920	30	2,890	1,090	30	40	0	1,160	
	Mid 2024 - Mid 2046	3,640	3,550	40	3,510	1,300	50	60	0	1,410	
Mid 2024 - Mid 2051	4,120	4,020	50	3,970	1,440	60	80	0	1,580		

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C2 – Town of Carleton Place

	Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other	Total Households	
Historical	<i>Mid 2006</i>	9,840	9,453	198	9,255	2,580	575	525	15	3,695	2.558
	<i>Mid 2011</i>	10,210	9,809	299	9,510	2,747	585	624	17	3,973	2.469
	<i>Mid 2016</i>	11,080	10,644	324	10,320	2,960	640	640	30	4,270	2.493
	<i>Mid 2021</i>	12,830	12,517	247	12,270	3,405	785	975	50	5,215	2.400
	<i>Mid 2024</i>	14,020	13,676	304	13,372	3,556	987	1,187	50	5,780	2.366
Forecast	<i>Mid 2026</i>	14,710	14,346	344	14,002	3,776	997	1,257	50	6,080	2.360
	<i>Mid 2031</i>	17,090	16,666	454	16,212	4,306	1,197	1,547	50	7,100	2.347
	<i>Mid 2036</i>	18,840	18,376	544	17,832	4,576	1,387	1,877	50	7,890	2.329
	<i>Mid 2041</i>	20,560	20,056	654	19,402	4,796	1,607	2,217	50	8,670	2.313
	<i>Mid 2046</i>	22,200	21,656	754	20,902	4,966	1,867	2,557	50	9,440	2.294
	<i>Mid 2051</i>	23,700	23,116	864	22,252	5,086	2,127	2,867	50	10,130	2.282
Incremental	Mid 2006 - Mid 2011	370	356	101	255	167	10	99	2	278	
	Mid 2011 - Mid 2016	870	835	25	810	213	55	16	13	297	
	Mid 2016 - Mid 2021	1,750	1,873	-77	1,950	445	145	335	20	945	
	Mid 2021 - Mid 2024	1,190	1,159	57	1,102	151	202	212	0	565	
	Mid 2024 - Mid 2026	690	670	40	630	220	10	70	0	300	
	Mid 2024 - Mid 2031	3,070	2,990	150	2,840	750	210	360	0	1,320	
	Mid 2024 - Mid 2036	4,820	4,700	240	4,460	1,020	400	690	0	2,110	
	Mid 2024 - Mid 2041	6,540	6,380	350	6,030	1,240	620	1,030	0	2,890	
	Mid 2024 - Mid 2046	8,180	7,980	450	7,530	1,410	880	1,370	0	3,660	
Mid 2024 - Mid 2051	9,680	9,440	560	8,880	1,530	1,140	1,680	0	4,350		

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C3 – Township of Drummond/North Elmsley

Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households	
		Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other	Total Households		
Historical	<i>Mid 2006</i>	7,410	7,118	43	7,075	2,580	60	10	25	2,675	2.661
	<i>Mid 2011</i>	7,790	7,487	52	7,435	2,722	24	15	129	2,890	2.591
	<i>Mid 2016</i>	8,090	7,773	53	7,720	2,920	30	25	125	3,100	2.507
	<i>Mid 2021</i>	8,390	8,183	58	8,125	3,090	25	40	135	3,290	2.487
	<i>Mid 2024</i>	8,660	8,450	61	8,389	3,248	25	46	135	3,454	2.446
Forecast	<i>Mid 2026</i>	8,950	8,730	61	8,669	3,408	25	46	135	3,614	2.416
	<i>Mid 2031</i>	9,380	9,150	71	9,079	3,588	25	56	135	3,804	2.405
	<i>Mid 2036</i>	10,070	9,830	71	9,759	3,828	35	76	135	4,074	2.413
	<i>Mid 2041</i>	10,670	10,410	81	10,329	4,028	45	96	135	4,304	2.419
	<i>Mid 2046</i>	11,140	10,870	91	10,779	4,178	65	106	135	4,484	2.424
	<i>Mid 2051</i>	11,520	11,240	101	11,149	4,288	75	126	135	4,624	2.431
Incremental	Mid 2006 - Mid 2011	380	369	9	360	142	-36	5	104	215	
	Mid 2011 - Mid 2016	300	286	1	285	198	6	10	-4	210	
	Mid 2016 - Mid 2021	300	410	5	405	170	-5	15	10	190	
	Mid 2021 - Mid 2024	270	267	3	264	158	0	6	0	164	
	Mid 2024 - Mid 2026	290	280	0	280	160	0	0	0	160	
	Mid 2024 - Mid 2031	720	700	10	690	340	0	10	0	350	
	Mid 2024 - Mid 2036	1,410	1,380	10	1,370	580	10	30	0	620	
	Mid 2024 - Mid 2041	2,010	1,960	20	1,940	780	20	50	0	850	
	Mid 2024 - Mid 2046	2,480	2,420	30	2,390	930	40	60	0	1,030	
Mid 2024 - Mid 2051	2,860	2,790	40	2,760	1,040	50	80	0	1,170		

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C4 – Township of Lanark Highlands

Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households	
		Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other	Total Households		
Historical	Mid 2006	5,390	5,180	15	5,165	2,000	10	65	45	2,120	2.443
	Mid 2011	5,340	5,128	28	5,100	2,042	10	40	34	2,126	2.412
	Mid 2016	5,560	5,338	23	5,315	2,165	15	60	55	2,295	2.326
	Mid 2021	5,880	5,737	22	5,715	2,360	10	60	60	2,490	2.304
	Mid 2024	6,010	5,866	24	5,842	2,447	10	64	60	2,581	2.273
Forecast	Mid 2026	6,190	6,046	24	6,022	2,547	10	64	60	2,681	2.255
	Mid 2031	6,470	6,316	34	6,282	2,667	10	74	60	2,811	2.247
	Mid 2036	7,050	6,876	34	6,842	2,867	20	84	60	3,031	2.269
	Mid 2041	7,530	7,346	44	7,312	3,027	30	104	60	3,221	2.281
	Mid 2046	7,920	7,726	44	7,682	3,157	40	114	60	3,371	2.292
	Mid 2051	8,230	8,036	54	7,982	3,237	50	134	60	3,481	2.309
Incremental	Mid 2006 - Mid 2011	-50	-52	13	-65	42	0	-25	-11	6	
	Mid 2011 - Mid 2016	220	210	-5	215	123	5	20	21	169	
	Mid 2016 - Mid 2021	320	399	-1	400	195	-5	0	5	195	
	Mid 2021 - Mid 2024	130	129	2	127	87	0	4	0	91	
	Mid 2024 - Mid 2026	180	180	0	180	100	0	0	0	100	
	Mid 2024 - Mid 2031	460	450	10	440	220	0	10	0	230	
	Mid 2024 - Mid 2036	1,040	1,010	10	1,000	420	10	20	0	450	
	Mid 2024 - Mid 2041	1,520	1,480	20	1,470	580	20	40	0	640	
	Mid 2024 - Mid 2046	1,910	1,860	20	1,840	710	30	50	0	790	
Mid 2024 - Mid 2051	2,220	2,170	30	2,140	790	40	70	0	900		

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C5 – Town of Mississippi Mills

	Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units				Person Per Unit (P.P.U.): Total Population/ Total Households	
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other		Total Households
Historical	Mid 2006	12,220	11,734	269	11,465	3,865	180	305	20	4,370	2.685
	Mid 2011	12,890	12,385	285	12,100	4,201	208	399	28	4,836	2.561
	Mid 2016	13,700	13,163	303	12,860	4,470	400	415	15	5,300	2.484
	Mid 2021	15,110	14,740	345	14,395	4,935	565	535	5	6,040	2.440
	Mid 2024	15,740	15,354	375	14,979	5,122	617	578	5	6,322	2.429
Forecast	Mid 2026	16,420	16,014	415	15,599	5,372	627	608	5	6,612	2.422
	Mid 2031	18,100	17,654	495	17,159	5,732	747	848	5	7,332	2.408
	Mid 2036	20,250	19,754	605	19,159	6,182	937	1,138	5	8,262	2.391
	Mid 2041	22,300	21,754	735	21,019	6,542	1,157	1,428	5	9,132	2.382
	Mid 2046	24,180	23,584	845	22,729	6,822	1,407	1,728	5	9,962	2.367
	Mid 2051	25,820	25,184	965	24,219	7,012	1,657	1,988	5	10,662	2.362
Incremental	Mid 2006 - Mid 2011	670	651	16	635	336	28	94	8	466	
	Mid 2011 - Mid 2016	810	778	18	760	269	192	16	-13	464	
	Mid 2016 - Mid 2021	1,410	1,577	42	1,535	465	165	120	-10	740	
	Mid 2021 - Mid 2024	630	614	30	584	187	52	43	0	282	
	Mid 2024 - Mid 2026	680	660	40	620	250	10	30	0	290	
	Mid 2024 - Mid 2031	2,360	2,300	120	2,180	610	130	270	0	1,010	
	Mid 2024 - Mid 2036	4,510	4,400	230	4,180	1,060	320	560	0	1,940	
	Mid 2024 - Mid 2041	6,560	6,400	360	6,040	1,420	540	850	0	2,810	
	Mid 2024 - Mid 2046	8,440	8,230	470	7,750	1,700	790	1,150	0	3,640	
Mid 2024 - Mid 2051	10,080	9,830	590	9,240	1,890	1,040	1,410	0	4,340		

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C5.1 – Town of Mississippi Mills Incremental Population and Housing Growth Forecast By Fully Serviced Settlement Area

	Development Location	Timing	Singles & Semi-Detached ^[1]	Multiples ²	Apartments ³	Total Residential Units	Institutional Population	Net Population Including Institutional
Mississippi Mills	Mississippi Mills	Mid 2021 - Mid 2024	190	50	40	280	30	610
		Mid 2024 - Mid 2026	250	10	30	280	40	660
		Mid 2024 - Mid 2031	610	130	270	1,010	120	2,300
		Mid 2024 - Mid 2036	1,060	320	560	1,930	230	4,400
		Mid 2024 - Mid 2041	1,420	540	850	2,810	360	6,400
		Mid 2024 - Mid 2046	1,700	790	1,150	3,630	470	8,230
		Mid 2024 - Mid 2051	1,890	1,040	1,410	4,350	590	9,830
	Almonte	Mid 2021 - Mid 2024	140	50	40	230	30	530
		Mid 2024 - Mid 2026	170	10	30	200	40	510
		Mid 2024 - Mid 2031	350	130	250	730	120	1,650
		Mid 2024 - Mid 2036	560	320	510	1,390	230	3,110
		Mid 2024 - Mid 2041	700	540	780	2,020	360	4,480
		Mid 2024 - Mid 2046	780	790	1,050	2,610	470	5,740
		Mid 2024 - Mid 2051	820	1,040	1,290	3,160	590	6,880
	Remaining Areas	Mid 2021 - Mid 2024	50	0	10	60	0	80
		Mid 2024 - Mid 2026	80	0	0	80	0	150
		Mid 2024 - Mid 2031	260	0	20	280	0	650
		Mid 2024 - Mid 2036	490	0	50	540	0	1,290
		Mid 2024 - Mid 2041	710	0	70	790	0	1,910
		Mid 2024 - Mid 2046	920	0	100	1,020	0	2,490
		Mid 2024 - Mid 2051	1,070	0	120	1,200	0	2,950

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C6 – Township of Montague

	Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other	Total Households	
Historical	Mid 2006	3,740	3,595	415	3,180	1,165	10	0	25	1,200	2.996
	Mid 2011	3,630	3,483	68	3,415	1,299	8	0	3	1,310	2.659
	Mid 2016	3,920	3,761	81	3,680	1,410	10	10	0	1,430	2.630
	Mid 2021	4,010	3,914	24	3,890	1,485	10	5	5	1,505	2.601
	Mid 2024	4,190	4,090	26	4,064	1,569	10	9	5	1,593	2.567
Forecast	Mid 2026	4,330	4,230	26	4,204	1,639	10	9	5	1,663	2.544
	Mid 2031	4,510	4,400	26	4,374	1,709	10	9	5	1,733	2.539
	Mid 2036	4,820	4,700	36	4,664	1,819	20	19	5	1,863	2.523
	Mid 2041	5,060	4,940	36	4,914	1,899	20	29	5	1,953	2.529
	Mid 2046	5,270	5,140	36	5,104	1,959	30	39	5	2,033	2.528
	Mid 2051	5,430	5,300	46	5,264	2,009	40	49	5	2,103	2.520
Incremental	Mid 2006 - Mid 2011	-110	-112	-347	235	134	-2	0	-22	110	
	Mid 2011 - Mid 2016	290	278	13	265	111	2	10	-3	120	
	Mid 2016 - Mid 2021	90	153	-57	210	75	0	-5	5	75	
	Mid 2021 - Mid 2024	180	176	2	174	84	0	4	0	88	
	Mid 2024 - Mid 2026	140	140	0	140	70	0	0	0	70	
	Mid 2024 - Mid 2031	320	310	0	310	140	0	0	0	140	
	Mid 2024 - Mid 2036	630	610	10	600	250	10	10	0	270	
	Mid 2024 - Mid 2041	870	850	10	850	330	10	20	0	360	
	Mid 2024 - Mid 2051	1,080	1,050	10	1,040	390	20	30	0	440	

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C7 – Town of Perth

	Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other	Total Households	
Historical	Mid 2006	6,150	5,907	27	5,880	1,780	175	930	30	2,915	2.026
	Mid 2011	6,080	5,840	35	5,805	1,829	153	929	35	2,946	1.982
	Mid 2016	6,170	5,930	155	5,775	1,850	170	955	35	3,010	1.970
	Mid 2021	6,630	6,469	279	6,190	1,950	180	1,110	30	3,270	1.978
	Mid 2024	6,790	6,626	287	6,339	1,958	180	1,253	30	3,421	1.937
Forecast	Mid 2026	6,930	6,766	297	6,469	2,018	180	1,293	30	3,521	1.922
	Mid 2031	7,740	7,556	337	7,219	2,218	210	1,423	30	3,881	1.947
	Mid 2036	8,510	8,306	377	7,939	2,348	290	1,563	30	4,231	1.963
	Mid 2041	9,270	9,046	417	8,619	2,458	380	1,693	30	4,561	1.983
	Mid 2046	9,980	9,736	467	9,269	2,548	480	1,833	30	4,891	1.991
	Mid 2051	10,620	10,366	507	9,859	2,608	590	1,953	30	5,181	2.001
Incremental	Mid 2006 - Mid 2011	-70	-67	8	-75	49	-22	-1	5	31	
	Mid 2011 - Mid 2016	90	90	120	-30	21	17	26	0	64	
	Mid 2016 - Mid 2021	460	539	124	415	100	10	155	-5	260	
	Mid 2021 - Mid 2024	160	157	8	149	8	0	143	0	151	
	Mid 2024 - Mid 2026	140	140	10	130	60	0	40	0	100	
	Mid 2024 - Mid 2031	950	930	50	880	260	30	170	0	460	
	Mid 2024 - Mid 2036	1,720	1,680	90	1,600	390	110	310	0	810	
	Mid 2024 - Mid 2041	2,480	2,420	130	2,280	500	200	440	0	1,140	
	Mid 2024 - Mid 2046	3,190	3,110	180	2,930	590	300	580	0	1,470	
Mid 2024 - Mid 2051	3,830	3,740	220	3,520	650	410	700	0	1,760		

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix C8 – Township of Tay Valley

	Year	Population (Including Census Undercount) ^[1]	Excluding Census Undercount			Housing Units					Person Per Unit (P.P.U.): Total Population/ Total Households
			Population	Institutional Population	Population Excluding Institutional Population	Singles & Semi-Detached ^[1]	Multiple Dwellings ^[2]	Apartments ^[3]	Other	Total Households	
Historical	Mid 2006	5,860	5,634	199	5,435	2,040	5	15	20	2,080	2.709
	Mid 2011	5,800	5,571	381	5,190	2,081	12	6	11	2,110	2.640
	Mid 2016	5,900	5,665	345	5,320	2,220	0	20	15	2,255	2.512
	Mid 2021	6,070	5,925	310	5,615	2,365	0	30	30	2,425	2.443
	Mid 2024	6,130	5,983	311	5,672	2,483	0	36	30	2,549	2.347
Forecast	Mid 2026	6,160	6,013	311	5,702	2,583	0	36	30	2,649	2.270
	Mid 2031	6,350	6,193	311	5,882	2,693	0	46	30	2,769	2.237
	Mid 2036	6,750	6,583	321	6,262	2,833	10	56	30	2,929	2.248
	Mid 2041	7,090	6,923	321	6,602	2,953	10	76	30	3,069	2.256
	Mid 2046	7,370	7,193	331	6,862	3,043	20	86	30	3,179	2.263
	Mid 2051	7,630	7,443	331	7,112	3,103	30	96	30	3,259	2.284
Incremental	Mid 2006 - Mid 2011	-60	-63	182	-245	41	7	-9	-9	30	
	Mid 2011 - Mid 2016	100	94	-36	130	139	-12	14	4	145	
	Mid 2016 - Mid 2021	170	260	-35	295	145	0	10	15	170	
	Mid 2021 - Mid 2024	60	58	1	57	118	0	6	0	124	
	Mid 2024 - Mid 2026	30	30	0	30	100	0	0	0	100	
	Mid 2024 - Mid 2031	220	210	0	210	210	0	10	0	220	
	Mid 2024 - Mid 2036	620	600	10	590	350	10	20	0	380	
	Mid 2024 - Mid 2041	960	940	10	930	470	10	40	0	520	
	Mid 2024 - Mid 2046	1,240	1,210	20	1,190	560	20	50	0	630	
Mid 2024 - Mid 2051	1,500	1,460	20	1,440	620	30	60	0	710		

Source: Historical data from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2024.

[1] Census undercount estimated at approximately 2.52%. Note: Population including the undercount has been rounded.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom and 2-bedroom+ apartments.

Appendix D

Employment Growth Forecast by Local Municipality, 2024 to 2051

Appendix D1 – Township of Beckwith

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	0	15	30	20	8	73	16	89
Mid 2024 - Mid 2031	1	55	71	81	30	238	64	302
Mid 2024 - Mid 2036	1	107	133	147	57	446	119	565
Mid 2024 - Mid 2041	2	153	188	214	84	641	169	811
Mid 2024 - Mid 2046	3	195	239	270	105	812	214	1,025
Mid 2024 - Mid 2051	3	231	279	310	123	947	252	1,199

^[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 D2 – Town of Carleton Place

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	0	35	32	47	30	144	37	181
Mid 2024 - Mid 2031	1	129	75	190	114	509	151	660
Mid 2024 - Mid 2036	1	252	141	345	214	954	279	1,233
Mid 2024 - Mid 2041	2	359	200	502	316	1,379	398	1,776
Mid 2024 - Mid 2046	3	457	254	634	395	1,743	502	2,244
Mid 2024 - Mid 2051	3	541	296	729	462	2,032	592	2,623

^[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 D3 – Township of Drummond/North Elmsley

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	1	10	21	14	5	51	11	62
Mid 2024 - Mid 2031	2	38	51	56	20	167	45	212
Mid 2024 - Mid 2036	4	75	96	102	37	313	83	396
Mid 2024 - Mid 2041	6	106	135	149	55	450	118	568
Mid 2024 - Mid 2046	8	135	172	188	68	570	148	719
Mid 2024 - Mid 2051	9	160	200	216	80	665	175	840

^[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 D4 – Township of Lanark Highlands

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	1	8	5	11	5	30	9	38
Mid 2024 - Mid 2031	2	30	13	44	19	107	35	142
Mid 2024 - Mid 2036	3	58	25	79	35	200	64	264
Mid 2024 - Mid 2041	5	82	35	115	52	289	91	380
Mid 2024 - Mid 2046	6	105	44	146	64	365	115	480
Mid 2024 - Mid 2051	8	124	52	167	75	426	136	562

^[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 D5 – Town of Mississippi Mills

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	1	37	38	48	31	155	39	194
Mid 2024 - Mid 2031	4	134	91	198	117	545	157	702
Mid 2024 - Mid 2036	7	263	171	359	220	1,020	291	1,311
Mid 2024 - Mid 2041	10	373	242	523	325	1,473	414	1,887
Mid 2024 - Mid 2046	13	475	308	660	407	1,863	522	2,385
Mid 2024 - Mid 2051	16	564	359	759	475	2,172	616	2,788

^[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 D6 – Township of Montague

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	1	5	9	6	3	23	5	28
Mid 2024 - Mid 2031	4	17	21	24	10	76	19	95
Mid 2024 - Mid 2036	7	32	39	44	19	142	36	178
Mid 2024 - Mid 2041	10	46	55	65	28	204	51	255
Mid 2024 - Mid 2046	13	59	70	81	34	258	64	323
Mid 2024 - Mid 2051	17	70	82	94	40	302	76	378

^[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 D7 – Town of Perth

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	1	14	43	18	28	104	15	119
Mid 2024 - Mid 2031	2	51	103	75	106	338	60	398
Mid 2024 - Mid 2036	4	100	195	137	198	634	111	745
Mid 2024 - Mid 2041	6	142	275	199	293	915	158	1,073
Mid 2024 - Mid 2046	8	181	350	251	367	1,156	199	1,355
Mid 2024 - Mid 2051	9	215	409	289	428	1,350	234	1,584

^[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 D8 – Township of Tay Valley

Period	Employment							Total Employment (Including N.F.P.O.W.)
	Primary	Work at Home	Industrial	Commercial/ Population Related	Institutional	Total	N.F.P.O.W. ^[1]	
Mid 2024 - Mid 2026	3	5	4	7	3	23	6	28
Mid 2024 - Mid 2031	11	20	9	29	13	82	23	105
Mid 2024 - Mid 2036	19	39	16	53	24	152	43	195
Mid 2024 - Mid 2041	27	56	23	78	35	219	62	280
Mid 2024 - Mid 2046	35	71	29	98	44	277	78	355
Mid 2024 - Mid 2051	43	84	34	113	51	325	92	417

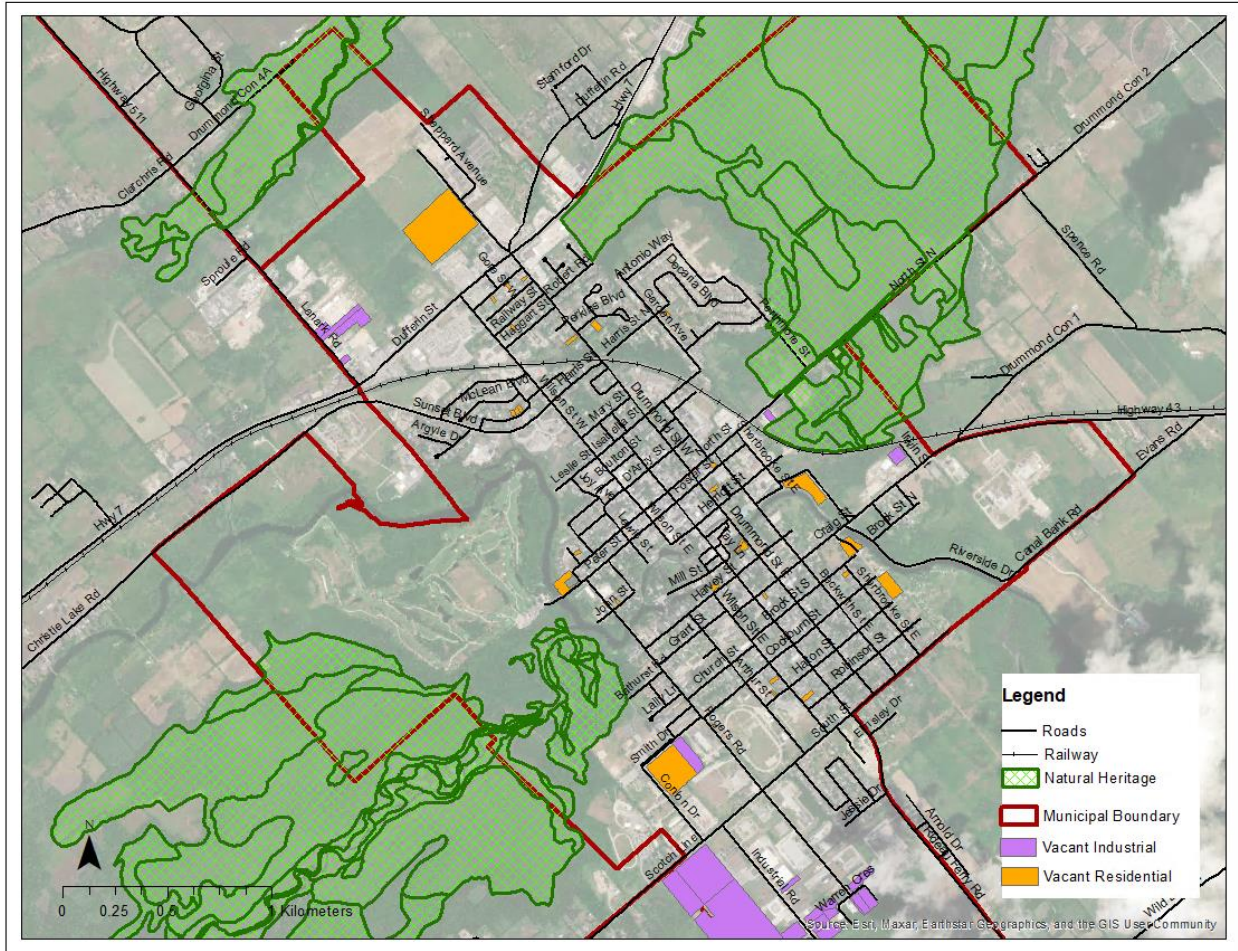
^[1] Statistics Canada defines no fixed place of work (N.F.P.O.W.) employees as "persons who do not go from home to the same work place location at the beginning of each shift". Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

Appendix E

Vacant Urban Land Supply Mapping

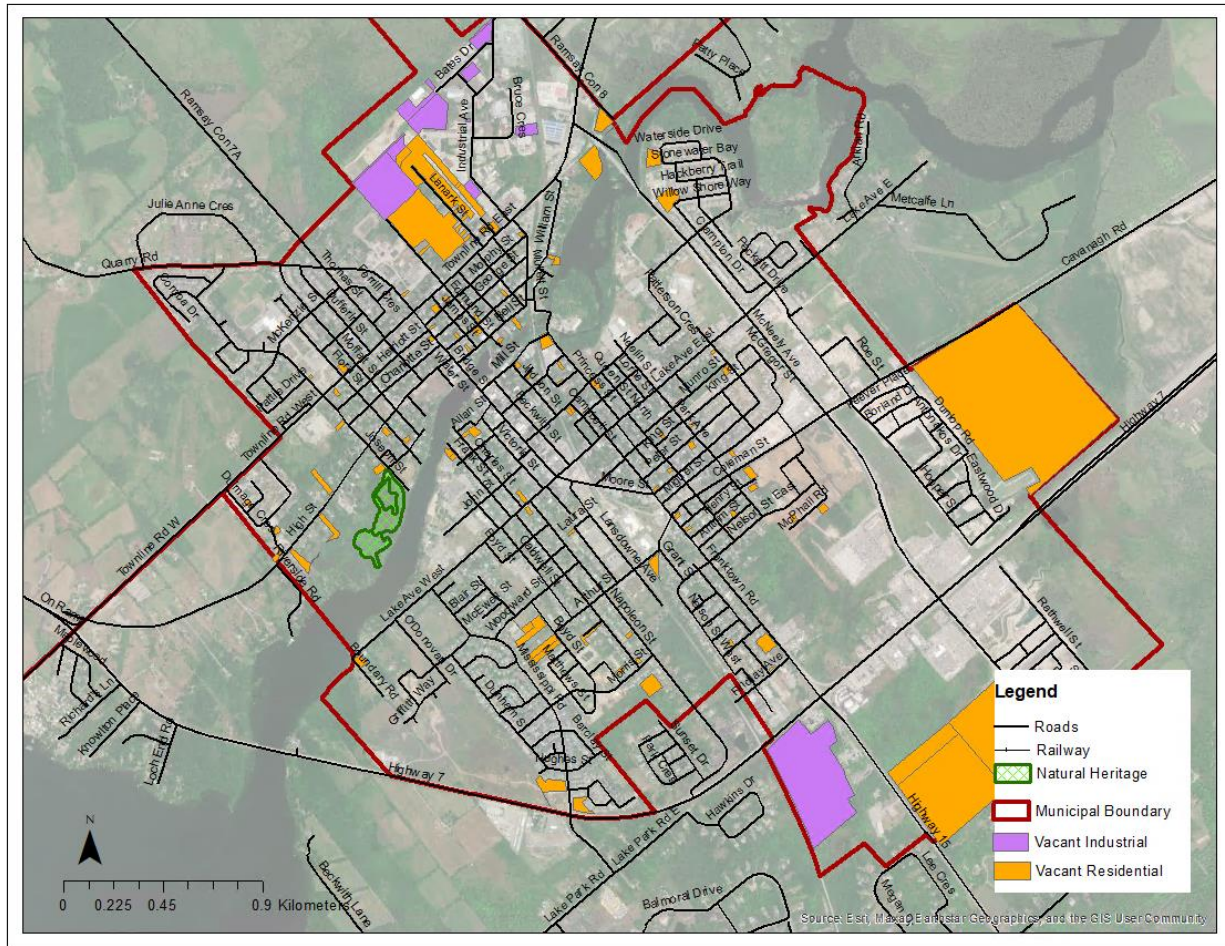
Appendix E – Vacant Residential and Employment Land Supply Maps

Town of Perth



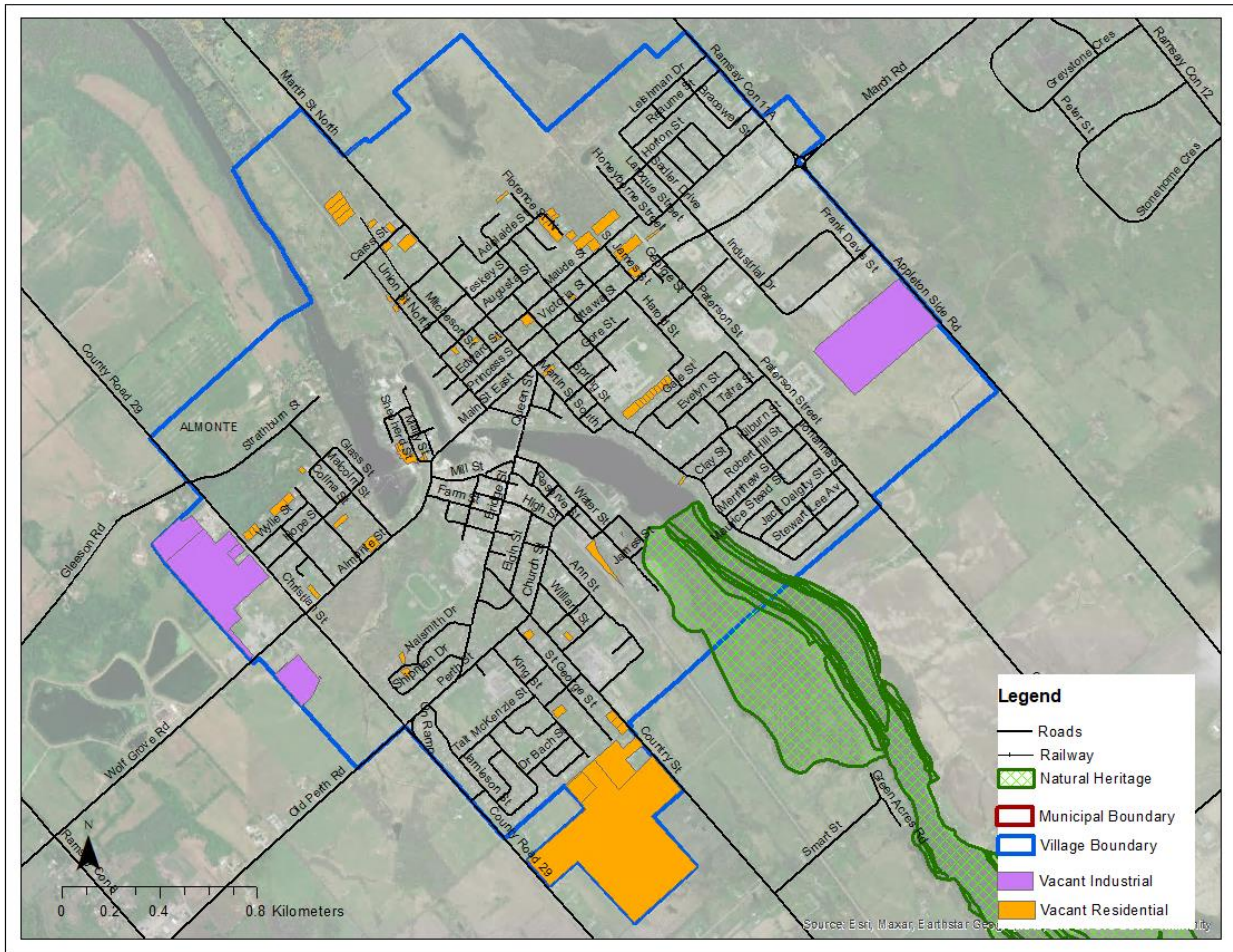
Note: Vacant residential areas sites depicted here do not include lands under active approvals process or pre-consultations

Town of Carleton Place



Note: Vacant residential areas sites depicted here do not include lands under active approvals process or pre-consultations

Almonte, Town of Mississippi Mills



Note: Vacant residential areas sites depicted here do not include lands under active approvals process or pre-consultations