

Municipality of North Grenville

Long-term Population, Housing and Employment Study

13 December, 2023



Executive Summary

The Municipality of North Grenville is one of the fastest growing municipalities in Eastern Ontario. Over the past 5 years, North Grenville has grown almost 70% faster than the provincial average.

Located at the southern edge of Ottawa, the Municipality has experienced steady growth from 2011 to 2021 – growing by just over 9% every 5-year period. Seniors (aged 65 and over) represent an increasing proportion of North Grenville residents.

The Municipality has seen an average of 135 new dwelling units developed each between 2011 and 2021, which has largely kept pace with population growth. However, persistent regional and local growth is creating more demand for housing development in the coming years.

The demographic shift over the study planning horizon (2046) will be characterized by a growing but ageing population, with a small increase in younger, family-aged residents. The report identifies a number of considerations the Municipality should take into account, when planning for this growth:

- A need to **prepare for growth coming from outside** North Grenville but from within Ontario, especially from the Ottawa metro area.
- A need to prepare for an **aging population**, including a retiree influx into the Municipality as well as seniors ageing within the community.

- **Regional employment** as a more prominent economic driver, with local employment growth in the service and construction sectors.
- **Lower near-term demand** for employment land, based on remote work and other employment trends.
- The need for **housing development sites** with favourable characteristics, including access to local services, regional transport, municipal roads, water and wastewater.
- Policy interventions to support housing affordability.

The Study identifies that 4,905 new dwelling units will be required by 2046, an average of 196 new units per year, and a 45% increase in the annual rate of construction. The Study offers a set of options for new development.

Overall, North Grenville has sufficient land to accommodate growth over the planning horizon, but the community must decide how this growth will take place. With the right policy and urban planning responses, the community can meet its objectives for sustainability, affordability, and accessibility, in the way it accommodates its current and future population.

Report Content and Structure

Overview of this Report

Section 1 provides an introduction and background to the Study. It describes the high-level steps followed in developing the analysis.

The Municipal Profile in **Section 2** presents a historical demographic, employment, and housing analysis to characterize the patterns that have driven growth to date and are affecting key issues like affordability.

A baseline of household and employment trends in that section characterizes North Grenville's current situation, providing evidence as to how the Municipality got to where it is, which helps inform estimates for future growth projections.

The Municipal Development Model is described in **Section 3**, where a set of growth scenarios is provided, for population and housing projections. In each scenario, the growth in the region is projected to continue outpacing regional growth to 2046. This puts pressure on the housing stock and municipal services, and calls for a need to identify realistic ways to accommodate new residents in North Grenville.

The Housing and Land Supply in **Section 4** offer a current state assessment of the supply of residential, commercial and employment land use.

Section 5 identifies candidate lands to be considered for redesignation / re-zoning.

Finally, a set of Policy options and next steps are provided to conclude the report in **Section 6**.



Downtown Kemptville includes a historic centre with unique shops and services, which is discussed as part of North Grenville's current economic profile.

Contents

01	Introduction and Background		2.1	Demographic Profile
02	Municipal Profile		2.2	Employment Profile
			2.3	Housing Profile
03	Municipal Development Model		3.1	Population Projections
04	Housing and Land Supply		3.2	Housing Demand Projections
05	Development Options		3.3	Land Use Projections
06	Conclusion and Next Steps		4.1	Housing Land Supply
			4.2	Economic Land Supply

01

Introduction and Background

Introduction

Municipality of North Grenville



North Grenville has experienced rapid economic and population growth over the past decade. The Municipality is growing faster than neighbouring communities and has persistent demand for new housing. This calls for the Municipality to respond proactively, to accommodate this growth responsibly.

The Municipality of North Grenville is a lower tier municipality, and part of the United Counties of Leeds and Grenville located in Eastern Ontario. While the Province of Ontario prepares population projections across census agglomerations, it does not do so at the level of North Grenville.

The most recent Long-Term Population, Housing, and Employment Forecast specifically prepared for North Grenville was prepared in 2017, and served as a foundational document upon which the North Grenville Official Plan was based.

Since 2015, North Grenville has experienced significant growth pressures (both infill and greenfield development). In fact, growth in North Grenville has outpaced the projections. Growth in North Grenville is on pace with the alternative growth rate (e.g., the higher growth rate) identified in North Grenville's current Official Plan. The high growth rate has resulted in development pressure and in accelerated new home starts.

Given that the growth and development rate is higher than anticipated by the projections prepared on 2017, and that several factors (such as the COVID pandemic) have impacted growth patterns, the Municipality determined that it was appropriate to undertake an update of the Long-Term Population, Housing and Employment Forecast.

This Study analyzes population, demographic, employment and housing trends, to inform the growth projections to the study's planning horizon: 2046.

These growth projections are the basis for the housing and land supply demand estimates. North Grenville is committed to providing a broad range of amenities and services to its residents and visitors. The Municipality is considering what types of growth can be expected and how this growth can be managed, over the next 25 years. This report is an important step to inform long-term Municipal strategic and land use planning.

Approach to the Study



Process and Outcomes

Data from Statistics Canada, CMHC, Environics, North Grenville and other sources is used to analyze population, employment and housing growth patterns that have led to transformations in North Grenville's land use over the past twenty years.

This analysis is used to develop projections to the planning horizon for the study, in 2046. These projections provide the Municipality with a foundation on which associated work, including revisions to the Official Plan and Zoning Bylaw, can be based. It further provides an initial look into future growth challenges.

The Long-Term Population, Housing and Employment Forecast offers an assessment of historic and expected future growth, and forms the basis for the projected housing and land use demand. Population projections were developed according to the Province of Ontario *Projection Methodology Guideline*, using inputs from Provincial population projections that were adapted based on local contextual conditions and historic trends.

The study also conducts a supply analysis, evaluating the suitability of available land to meet anticipated housing and land use demands – and considers whether additional lands are needed to be added into the Urban Boundary and/or Serviced Areas to accommodate growth.

The report was developed using the following key steps:



Historical Data Analysis, Trends and Initial Findings

Assess population, employment and housing growth over the past twenty years



Population, Housing, and Employment Growth Models

Project growth and assess future housing and land use needs



Recommendations to Accommodate Future Growth

Assess current housing and land use supply and the ability to accommodate projected demand

Key Questions of the Study

This report offers projections and options for responsible long-term growth for the Municipality, including:

- ✓ Assessment of current and planned residential growth; serviced and non-serviced lands
- ✓ Whether infill and intensification has accommodated 20% of recent growth in the Municipality
- ✓ An assessment of the employment market and recent trends
- ✓ Understanding the demographic reality with impacts on future growth

**How much is North
Grenville going to
grow?**

**What is the
Municipality
prepared for?**

**How does the Municipality
need to adjust, to be better
prepared?**

02

Municipal Profile

Municipal Profile

Municipality of North Grenville



North Grenville has experienced rapid economic and population growth over the past decade. This section provides details on how that growth has unfolded, to inform projections for future growth.

This section provides a current state overview of the Municipality of North Grenville. The overview focusses on the key information that help identify trends and issues to inform further analysis. There are three subsections:

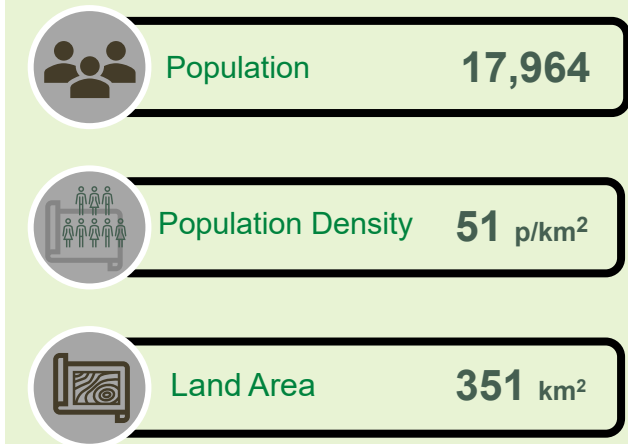
- 1) A profile of recent **demographic trends** in the municipality
- 2) A profile of major **employment sectors** and trends in employment
- 3) A profile of recent **housing trends** including new dwellings

These trends served to inform the development of the municipal development model, as well as of the analysis of the current land supply.

North Grenville is seeing an ageing population, with the fastest growth in population among those over age 55, and the most common age range between 55 and 69. However, there is also notable population growth in the 25 to 39 year age range.

Movement within Ontario is driving the largest influx of new residents, representing 89% of new residents arriving in the past 5 years. The Municipality is attracting residents from the wider region, and seeing relative parity in income growth compared to nearby Ottawa. Understanding these pressures is crucial for future growth planning in North Grenville.

Municipal Characteristics, 2021



Sources: [Ontario, Ottawa, North Grenville – Statistics Canada](#)

Population Growth & Characteristics

Demographic Statistics

There are an estimated 17,960 people who live in North Grenville, of which approximately 6,000 people live in the Kemptville urban service area.

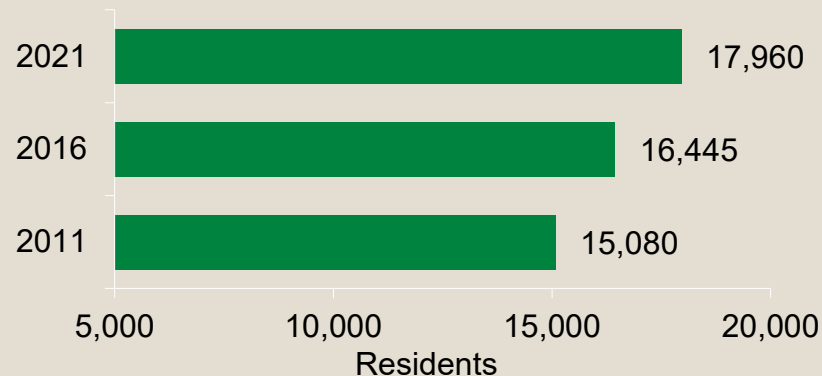
North Grenville experienced an increase of 1,515 residents (or a growth rate of 9.2%) over the five year period from 2016 to 2021. This is equivalent to an annual growth rate of 1.76%. This growth rate is consistent with the growth rate from the previous five year period, from 2011 to 2016 (9.1%).

While North Grenville's main population group is working age residents, its median age is higher than its average age. Further details on the population structure and age is provided on the following slide.

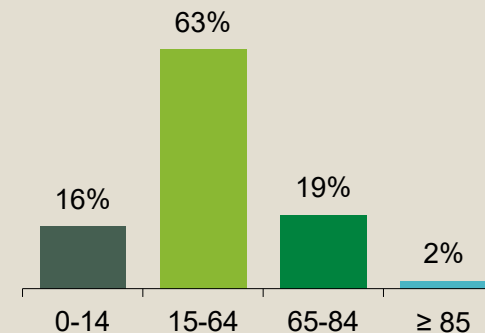
43.8 Yrs

The average age of residents in the Municipality of North Grenville is 43.8 years, while the median age is 46.4 years

Population, 2011 - 2021



Age Distribution, 2021



63% of North Grenville Residents fall into the 15-64 age range, which includes most of the region's workforce.

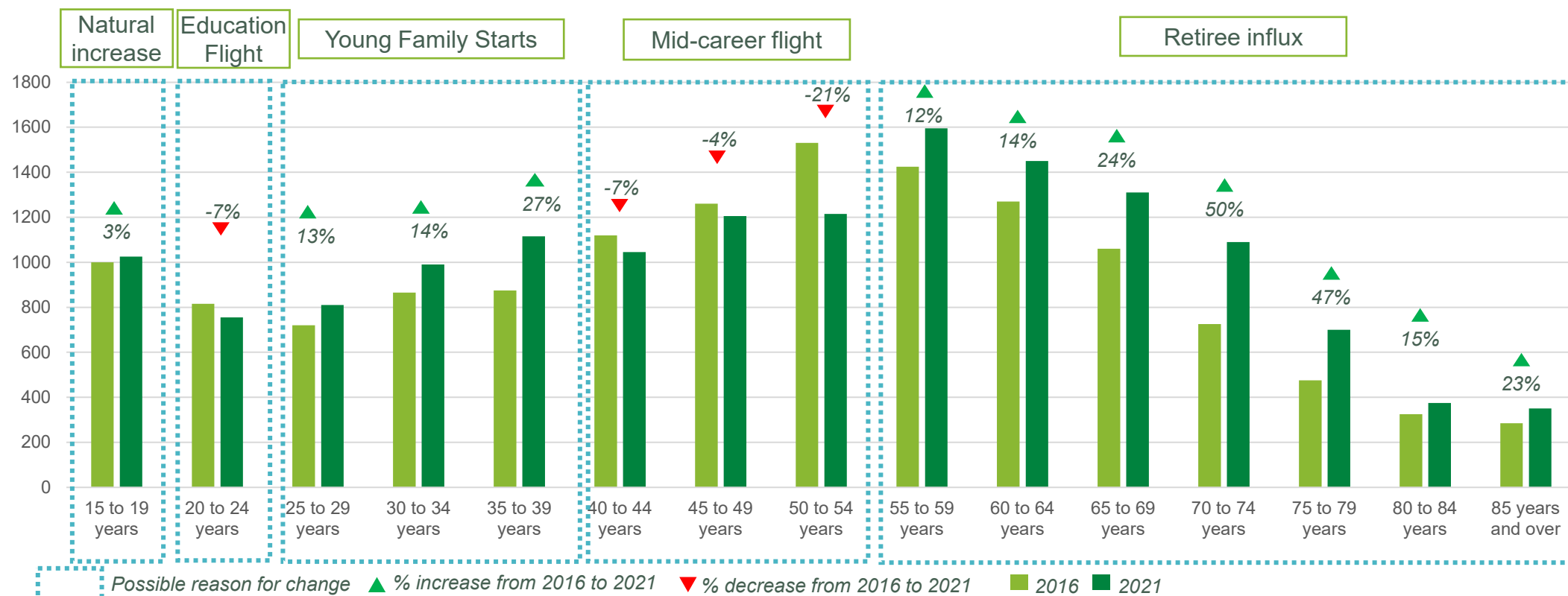
Approximately 2,870 residents are children under age 14.

Population Change, 2016 to 2021

Demographic Trends

Recent growth in North Grenville is focused chiefly among two population groups: seniors and young adults.

Current trends in North Grenville show growth among individuals in the 25-39 age group, as well as faster rates of population growth among people over the age of 55, with the fastest growing age category being persons over 65 years of age.



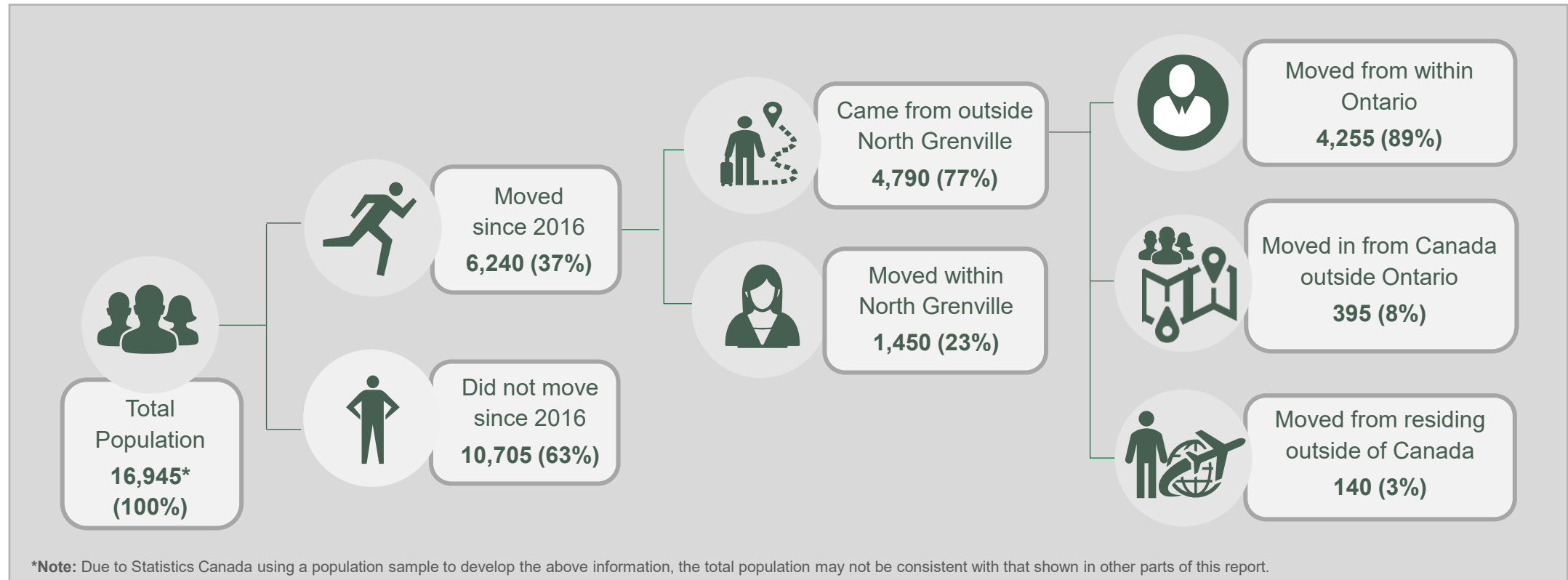
Note. Age groups 0-14 years have not been included in the graph as the readability of the graph reduces, which had an overall growth of 9% most likely due to natural increase

Mobility status

5 Years from 2016 to 2021

North Grenville saw a net increase of 1,515 residents from 2016 to 2021.

Census data shows 4,790 people relocated into the community between 2016 and 2021, 89% of whom moved from within Ontario. The census suggests 140 people arrived from outside Canada over the 5-year period.



Source: **Sources:** Statistics Canada [North Grenville 2021](#), North Grenville [2016](#)

Employment Profile



North Grenville has a **vibrant local economy** that includes light industry, transportation and warehousing, as well as shops and services oriented to residents and visitors. In addition, the community of Kemptville is located 56 km from downtown Ottawa, a major regional employment centre that is just a 35- to 40-minute drive away.

North Grenville's labour force is focused in four main industries, which together employ nearly half of local working residents:

- 1) **Public Administration**
- 2) **Retail Trade**
- 3) **Healthcare and social assistance, and**
- 4) **Construction**

The fact that public administration represents the most significant industry for North Grenville's residents can likely be attributed in part to the municipality's proximity to Ottawa and the Federal Government.

Retail continues to serve the local community, while healthcare and social assistance are likely in demand by seniors. Finally, construction may be partly attributable to growth pressures in the Municipality. This and other industries may serve growth in surrounding communities.



New Employment

The **Farmside Lands of the former Guelph Campus** are to be developed as a provincial correctional facility. This will bring additional employment to the community, but will also place new demands on municipal water and wastewater services.

Labour Force Characteristics

North Grenville's Labour Force Characteristics

Public Administration continues to be the most common industry for the local labour force, accounting for 14% of all employed persons.

The labour force participating in Public administration is the second fastest growing, with a 5-year growth rate of 13%.

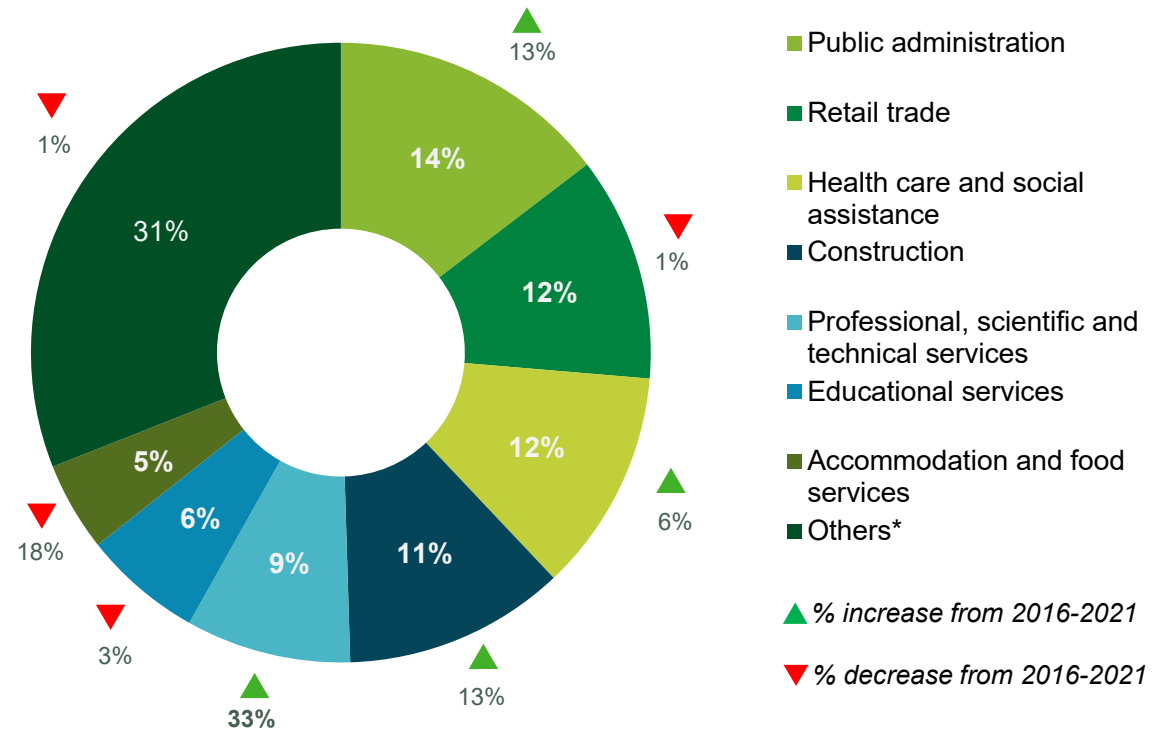
Employment in Retail trade, and Health care and social assistance each account for 12% of the North Grenville workforce. Construction accounts for 11% of the labour force. A decrease in Retail trade is noteworthy, while Health care and social assistance and Construction saw increases of 6% and 13%, respectively.

The most significant growth over the 5-year period was seen in Professional, scientific and technical services. Currently accounting for 9% of the workforce, employment in this industry increased by 33% in its share of those employed.

Remaining industries, including Education, Accommodation and food services, Agriculture, Mining, and Manufacturing, together saw a very minor decrease in total employment share.

These trends point towards increasing prominence of the knowledge economy as an employment driver in North Grenville, as discussed on the following page.

North Grenville Labour Force by Industry, 2021



* Others include Agriculture, forestry, fishing and hunting, Mining, quarrying, and oil and gas extraction, Utilities, Manufacturing, Wholesale trade, Transportation and warehousing, Information and cultural industries, Finance and insurance, Real estate and rental and leasing, Management of companies and enterprises, Administrative and support, waste management and remediation services, Arts, entertainment and recreation and Other services (except public administration)

Sources: Statistics Canada – North Grenville [2021](#), North Grenville [2016](#).

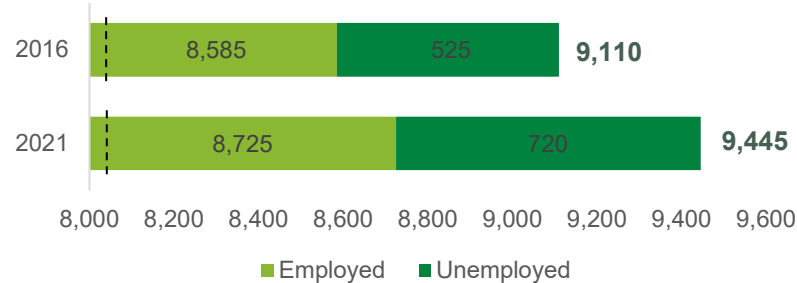
Employment Trends

Identifying Future Employment Opportunities

Growth in Senior-Oriented Services

Age-based population projections indicate that by 2046, more than 6,000 people over age 65 will be living in North Grenville than do today. Details on this growth are described in the Appendix.

North Grenville, Total Workforce, 2016-2021



The growth in the senior population means that a lower share of North Grenville residents will be in the workforce. However, employment in senior-oriented services, including Healthcare and social assistance, can be expected to continue growing into the future to support this population.

Stability or Decline in Retail trade

Retail trade has been in a slight decline locally over the past 5 years. Given that seniors and families are expected to drive population growth, there will continue to be demand for local business in retail and services for the local population. It is unlikely there will be a rapid decline in the Retail trade sector, but a Retail resurgence is similarly considered unlikely following recent local trends and broader shifts to online services.

Significant Growth in Professional, scientific and technical services, and Public administration

The outpaced growth in Professional, scientific and technical services (33% growth in 5 years), as well as Public Administration (13% growth in 5 years) may be the result of significant increases in hybrid working for major employers such as the Federal Government and professional service firms, since the pandemic.

The increase in hybrid working arrangements has enabled residents living in North Grenville to work for employers that would typically be located further away (e.g., in Ottawa) since the need to commute is reduced or eliminated. It also enables Ottawa residents to move further from their places of employment, to settle in locations with more affordable housing or desirable lifestyle options.

Growth in Construction

Employment in the Construction sector is growing as rapidly as Public administration, likely in response to North Grenville's persistent population growth with corresponding demand for new housing and commercial developments. With continued demand for new development, the Construction sector is likely to be a major employer.

Stability or Decline in Other sectors

Other sectors, including Accommodation and food services, Agriculture, and Transportation are seeing declines.

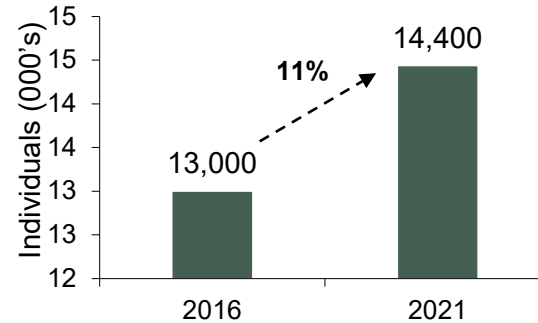
Income characteristics

Individual and Household Income, North Grenville, 2016 - 2021

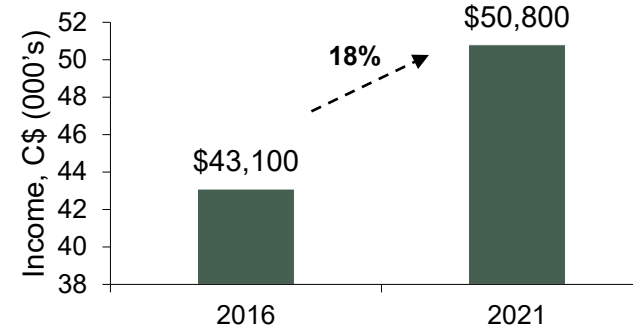
Individuals

The average growth in income among individuals outpaced population growth, at 18% and 11% respectively. The average income is higher than the provincial average, but lower than the City of Ottawa.

Number of Individuals aged 15+



Median total income among individuals (\$)



Median income of individuals, 2021

\$50,800

North Grenville

\$50,000

Ottawa

\$41,200

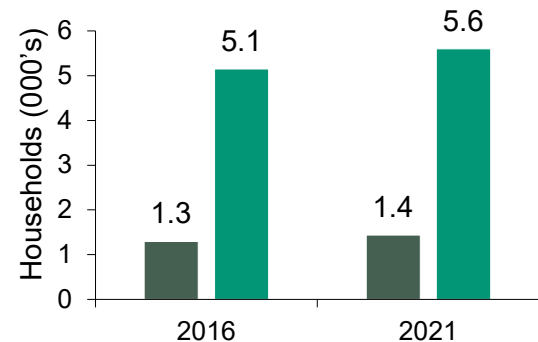
Ontario

Households

There are 1,400 one-person households and 5,600 households with 2 or more people living in North Grenville.

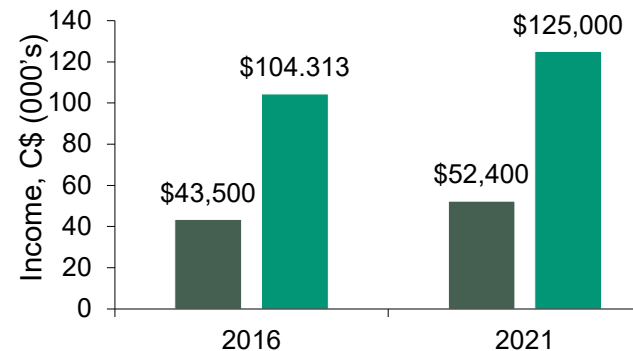
At the household level, there has been an overall increase of 20% in income levels. The average income among households is also higher than the provincial average.

Number of households (000's)



■ One person household ■ Two or more person household

Median income by household size (\$)



Median income of all households, 2021

\$108,000

North Grenville

\$102,000

Ottawa

\$91,000

Ontario

Sources: Stats Canada [2021 - North Grenville, Ottawa, Ontario](#), North Grenville [2016](#).

Housing Profile



There is ongoing development of new housing in North Grenville. Recent trends have shown single detached as the most common new housing type, but the proportion of higher density housing types (row housing, apartments, and other housing options) is increasing.

In 2021, North Grenville had an estimated total of 7,100 dwelling units, of which 82% were single detached homes. Growth has been persistent over the previous two five-year periods, slowing slightly from a 13% to a 9% rate.

This section identifies characteristics and important trends in housing development. It provides an in-depth view into the quantity and types of housing being developed, and the types of households that exist in the community.

Finally, figures including home ownership rates and housing affordability give an indication of the rising challenges of home ownership, when compared to the income and employment characteristics.



New Housing Development

Oxford Village is a zoned and approved development on the western edge of Kemptville's urban service area with construction that started in 2023. The development proposed 398 new housing units in mixed typologies. Servicing this property has brought water and sewer to this area, which may also support additional future development.

Key Housing Facts

The following presents a summary of key housing facts for North Grenville. Additional details are provided on the following pages.

Dwellings

- There was an 8.8% increase in total dwellings between the 2016 and 2021 census periods, down slightly from the 12.7% increase in total dwellings between 2011 and 2016.
- 97% of dwellings in 2021 were occupied by **usual residents**, which has been constant since 2011 with minimal change
- The average household size is 2.5 members per household

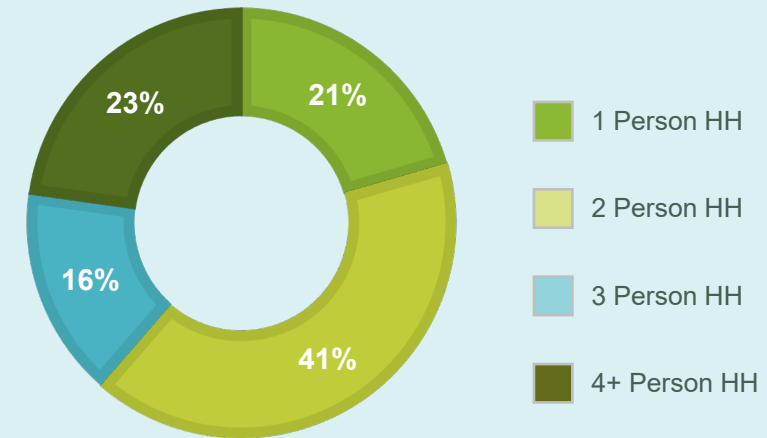
Housing Typology

Although single detached dwellings continue to make the majority of the existing housing stock in North Grenville, as well as the majority of new builds, there is growth in the proportion of semi-detached and townhouse units.

Affordability

14% of North Grenville residents spend more than 30% of their income on housing costs. This indicates that housing affordability may be a challenge.

Household Size



Household size represents the number of people, whether related or not, who live together in a dwelling unit, such as a house, town home, or apartment.

North Grenville residents live predominantly in 2 person households. Approximately 21% of the population lives alone, while 39% live in groups of 3 or more, which includes situations such as families with children, roommates, and multi-generational households.

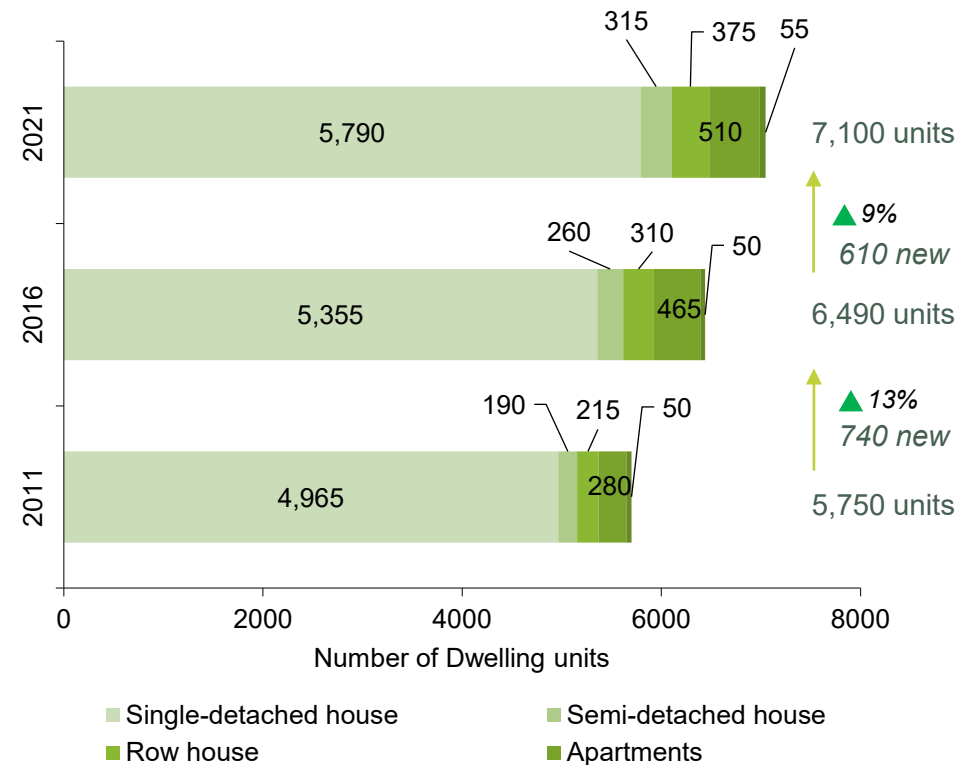
Growth in Housing Since 2011

North Grenville saw the development of 740 new housing units between 2011 and 2016, and 610 new housing units between 2016 and 2021.

While most new development continues to be single detached dwellings, there was a gradual shift towards denser housing typologies, with growth in semi-detached and row housing exceeding 21% during the recent five-year period.

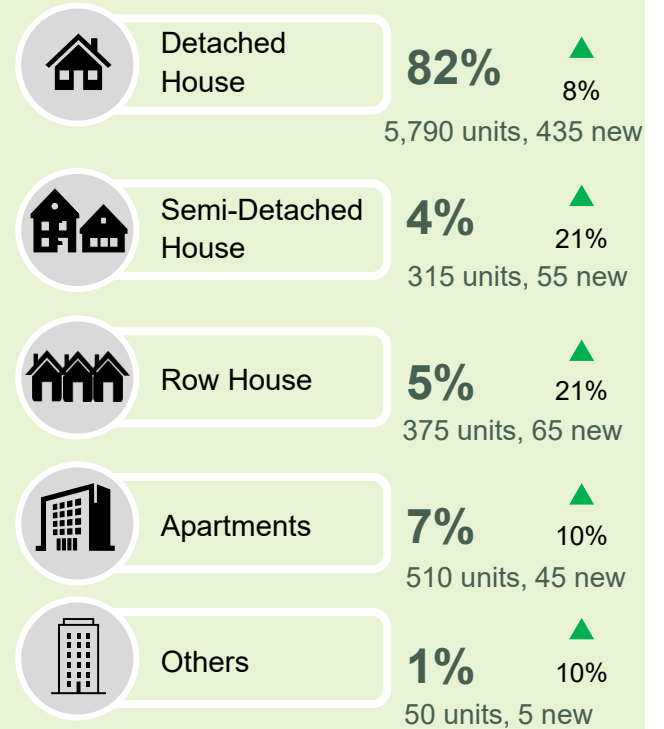
This trend is expected to continue and is incorporated into the forecast housing unit mix in the following section.

Housing by typology, 2011-2021



Housing Mix, 2021

Growth since 2016



▲ % increase from 2016-2021

▼ % decrease from 2016-2021

▲ % increase

Sources: Statistics Canada [North Grenville 2021](#), North Grenville [2016](#), North Grenville [2011](#)

Residential Infill and Intensification

Infill and Intensification, 2016 - 2021

- The Municipality's Official Plan encourages development through infill and intensification in Hamlets and the Kemptville Urban Service Area
- The stated goal is to accommodate 20% of growth in areas specified by North Grenville's infill and intensification policies

Between 2016 and 2021, in the census-designated place of Kemptville, which covers an area of 3.7 km², net residential development across all housing types comprised 18% of the total new housing development in North Grenville.

Kemptville Housing Unit Mix

It is noteworthy that within the Kemptville census area, all growth during the period was in the form of higher-density housing. According to Census data, the single detached homes built in North Grenville were outside the confined Kemptville Census area.

The lower rate of growth in Kemptville suggests that North Grenville's infill and intensification policies and programs designed to **promote more of this type of growth** may need to be revisited. Examples of approaches to this are provided in the final section of this report.

Housing Unit Mix, Kemptville Census Area and North Grenville, 2016-2021

Housing Type	Kemptville 2016	Kemptville 2021	Kemptville 5-Year Change	North Grenville Municipality 2016	North Grenville Municipality 2021	North Grenville Municipality 5-Year Change	Kemptville Percent Share
Single Detached	1,020	1,020	0	5,355	5,790	435	0%
Semi-detached + other attached	185	215	30	275	330	55	55%
Duplex + Row House	270	310	40	395	460	65	62%
Apartment	220	255	35	380	425	45	78%
Total	1,695	1,800	105	6,405	7,005	600	18%

Home Ownership and Rental

Rates and Costs of Home Ownership, with Regional Comparisons

North Grenville is a community of home owners, with an 88% home ownership rate in 2021. This represents a slight increase from 87% in 2016.

Meanwhile, housing values are increasing at significantly faster rates than incomes.

The value of dwellings in North Grenville increased by nearly 50% over the period from 2016-2021. This increase in house prices is notable in comparison to just an 18% increase in individual incomes over the same period, as discussed previously in the Income Characteristics analysis.

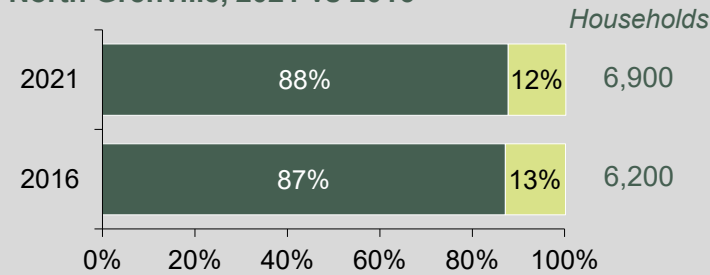
Average housing unit values in North Grenville remain slightly lower (17.6%) than in Ottawa. Considering the approximate parity in income levels, this makes home ownership more affordable in North Grenville.

Increasing employment for residents in industries that support hybrid work, as noted in the Employment Profile, will make North Grenville an attractive option for individuals who have remote work as an option. This puts additional, regional demand on North Grenville housing and prices.

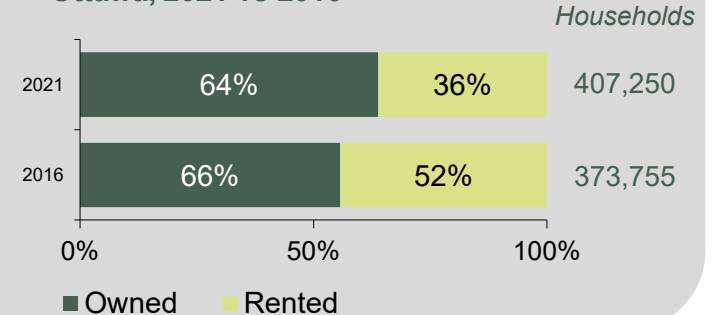


Home Ownership and Rental, Proportion of Total Households

North Grenville, 2021 vs 2016



Ottawa, 2021 vs 2016



Average Value of Dwellings, 2016 - 2021

2016 Values

\$369,847

North Grenville

\$444,589

Ottawa

2021 Values

\$554,000

North Grenville

\$672,000

Ottawa

5-Year Increase

49.8%

North Grenville

51.2%

Ottawa

Sources: Ottawa [2016](#), [2021](#); North Grenville [2016](#), [2021](#) – StatsCan

Housing Affordability

Cost of Living with Regional Comparisons

Monthly expenditures on shelter in North Grenville, excluding utilities and insurance, was \$1,472 on average for home owners and \$1,348 per month for renters.

Average monthly shelter costs are approximately 12% and 5.2% lower for owners and renters, respectively, than corresponding costs in the City of Ottawa.

Affordability

In 2021, shelter costs were unaffordable for 14% of the total North Grenville population, including owners and renters.

This means that 86% of households (both homeowners and renters) spend less than 30% of their income on shelter costs. Housing costs are affordable for more residents in North Grenville, than housing costs for residents in Ottawa, where 20% spend more than 30% of their income on shelter costs.

Affordability is a greater issue among renters in North Grenville than for home owners. 37.1% of tenant (rented) households in North Grenville spend 30% or more of their household income on housing and shelter. This is higher than the 35.1% of tenant households in Ottawa spending above the 30% threshold.

Home ownership is more affordable in North Grenville than in Ottawa. In North Grenville, just 10.3% of owner households have mortgage costs accounting for 30% or more of household income. In Ottawa, 11.7% of owner households have mortgage costs accounting for 30% or more of household income.



Average monthly expense on shelter, 2021

North Grenville

\$1,472

Owned

\$1,348

Rented

Ottawa

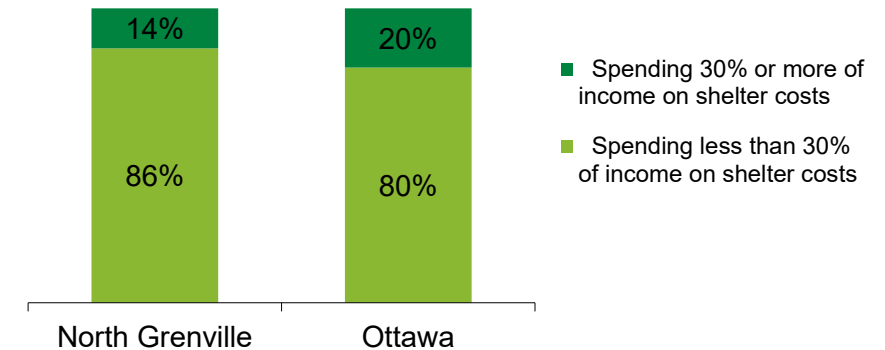
\$1,668

Owned

\$1,422

Rented

Shelter Cost vs Income, Overall, North Grenville and Ottawa, 2021



Sources: Stats Canada [2021 - North Grenville, Ottawa, Ontario](#) , North Grenville [2016](#)

03

Municipal Development Model

Using Data to Project Growth in North Greenville

Modeling Growth in North Grenville

Population, Employment and Housing projections based on historical trends and an evaluation of approaches to new land development, including development patterns and municipal land policies. The resulting regional growth projections offer insights into long-term demographic and economic pressures that drive municipal development.

The growth model is based on the Ontario Population Projections Update of 2022, which forecasts population growth across census agglomerations in the region, but to the level of North Grenville. The regional forecasts needed to be scaled to represent growth within North Grenville. To validate the scaled population projections, they were compared against Statistics Canada's Population Projections for Provinces and Territories and further tested with Municipal representatives. The result is three forecast scenarios for population growth in North Grenville:

- A low-growth scenario, which assumes that approximately 30% of projected regional growth occurs in North Grenville,
- A medium-growth scenario, assuming 50% of regional growth occurs in North Grenville, and
- A high-growth scenario, assuming 70% of regional growth occurs in North Grenville.

Projections into future demographic and economic growth trends to 2048:

Secondary research methodology based on historical trends and comparatives.

The population growth models are derived from figures provided in the Ontario Provincial Ministry of Finance projections to 2046.

Base and alternative population forecasts were developed specific to North Grenville and are used in this report to inform support estimates of employment, housing and land use demand.

The medium-growth scenario is used to inform estimates of housing and employment land use demand (also called the base scenario).

Ontario Population Projections

A context of rapid regional growth

The Ontario Ministry of Finance produced growth projections for Ontario's major population centres to 2046.

These projections demonstrate a context of growth pressure, resulting from North Grenville's proximity to a rapidly growing urban centre (Ottawa), and the fact that North Grenville will be part of a growing county (Leeds and Grenville).

Leeds and Grenville is projected to continue its growth to 2046:

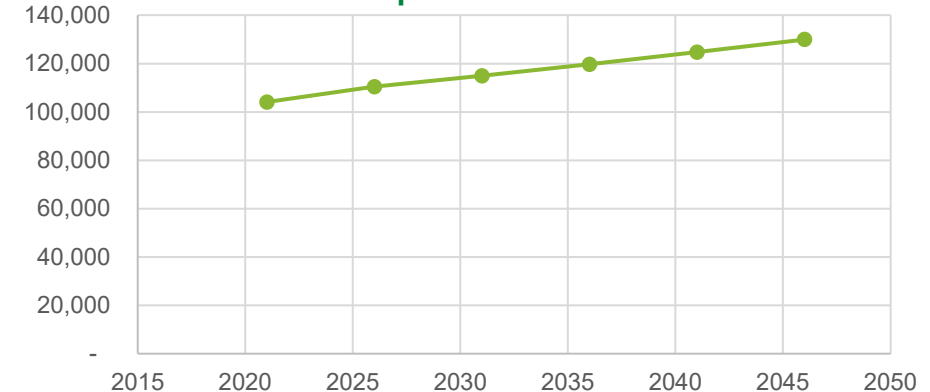
- For Leads and Grenville cumulatively, the growth rate from 2016 to 2021 was 3.5%
- For the 5-yr period from 2021 to 2026 the projected growth rate is 6%.
- For each 5-yr period between 2031 and 2046 the growth rate is projected to be just over 4%.

Ottawa is projected to grow rapidly from 2021 to 2046:

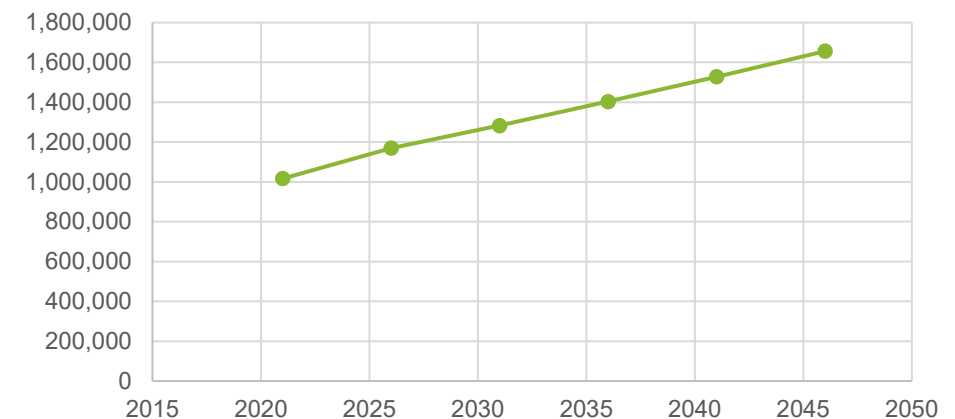
- Ottawa's historic growth rate over the 5-yr period from 2016 to 2021 was 8.9%.
- The Province projects that growth in the Municipality for the 5-yr period to 2026 will be 15%.
- In the following 5-yr periods between 2031 to 2046 the projected growth rate stabilizes between 8% and 10%

Ontario Official Growth Projections

Leeds and Grenville: Population Growth



Ottawa: Population Growth



Three Growth Scenarios: North Grenville

The three growth scenarios (low-, medium-, high-growth) assume that 30%, 50%, and 70%, respectively, of projected regional growth for the County of Leeds and Grenville occurs in North Grenville.

Scenario 1: Low Growth

Growth aligned with historic trends

- Growth continues at the pace observed between 2011-2021 (9.2%) until 2026, after which it reduces to the average growth rate observed in the 20-year period leading to 2021, of 7.6% for the remaining 20-year period.
- This scenario is low compared to nearby municipal growth rates.

Scenario 1 Projected Growth

Year	Population	5-yr Growth
2021*	17,964	9.2%
2026	19,616	9.2%
2031	21,117	7.6%
2036	22,732	7.6%
2041	24,471	7.6%
2046	26,343	7.6%

Scenario 2: Medium Growth

Growth pressure from Ottawa

- North Grenville continues to grow slightly faster than the City of Ottawa
- This is considered the most likely population growth scenario and is used to create housing demand projections.
- Based on the assumption that the proportion of growth in the United Counties going to North Grenville decreases

Scenario 2 Projected Growth

Year	Population	5-yr Growth
2021*	17,964	9.2%
2026	20,845	16.0%
2031	23,088	10.8%
2036	25,483	10.4%
2041	27,980	9.8%
2046	30,602	9.4%

Scenario 3: High Growth

Accelerated growth in relation to the rest of Leeds & Grenville County

- Persistent, double-digit growth in this projection pushes the North Grenville population over 36,000 by 2046.
- This is the highest rate of growth and is the model recommended by the Provincial *Projection Methodology Guideline*

Scenario 3 Projected Growth

Year	Population	5-yr Growth
2021*	17,964	9.2%
2026	22,446	25.0%
2031	25,586	14.0%
2036	28,939	13.1%
2041	32,434	12.1%
2046	36,105	11.3%

*Note that the 2021 figures represent actual population, not forecast population.

Projected Demand for New Housing to 2046

Growth in Dwelling Units by Type

The community's Official Plan encourages new development to meet or exceed the following housing mix targets:

- Low Density (approximately 18 units / ha) - 68%
- Medium Density (approximately 30 units / ha) - 21%
- High Density (approximately 45 units /ha) - 11%

Although these targets are included in the Official Plan, they are voluntary rather than mandatory. Therefore dwelling type projections were based on observable historical growth trends, since 2016, shown in the first row in the table on the right.

Single Detached houses were the most common type of new dwelling built between 2016 and 2021, accounting for 435 out of 605 new dwellings, or 71.9% of new homes constructed. If current shifts in housing types continue, single detached housing may represent 44% or less of new housing developed beyond 2041.

Medium Density housing includes row houses, duplexes, town homes and other attached dwellings, which accounted for 120 out of 605 new units in the 5 years to 2021. If municipal trends continue, this housing typology may become more prevalent.

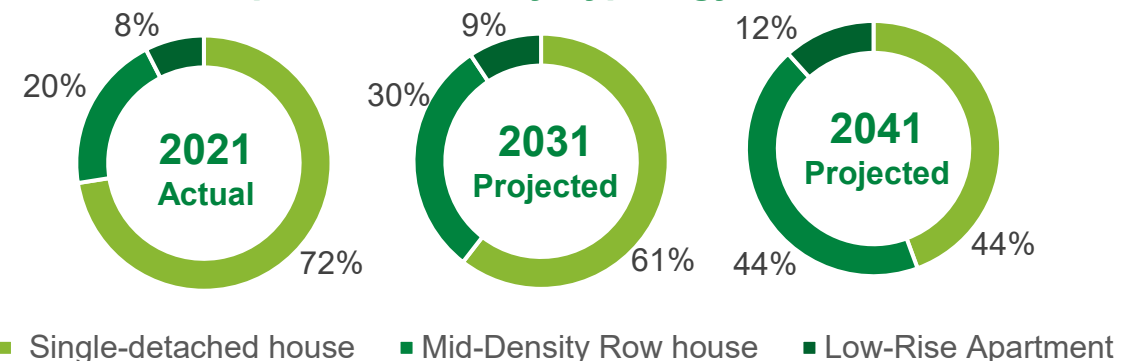
Higher Density housing includes low-rise apartments. Just 45 new homes of this type were developed over five years to 2021. Further densification and intensification may increase proportion of this type of housing in new developments.

New Housing Demand per 5-Year Period

5-Year Period, Ending	Total New Dwellings	Single-detached house	Mid-Density Row house	Low-Rise Apartment
2021*	605	435	120	45
2026	758	506	189	63
2031	848	513	256	79
2036	862	458	314	90
2041	874	388	384	102
2046	958	324	509	125
Total	4905	2624	1772	504

*Note that the 2021 figures represent actual housing demand, not forecast.

New Development Share by Typology



Projected Overall Dwelling Mix to 2046

Overall Distribution of Dwelling Units by Type

The overall distribution of dwelling units by type in North Grenville is driven by the existing typology distribution and the new development that takes place.

The total dwelling mix, right, demonstrates how the projected mix of housing typologies in new development will shift the overall distribution of housing stock to 2046. This shift in housing type distribution assumes new development follows the projections shown on the previous page.

Low density Single Detached houses account for 82% of the total housing in 2021. Projected growth based on trends supporting denser typologies, may gradually decrease the prevalence of this housing type to 71% of the total housing mix by 2046.

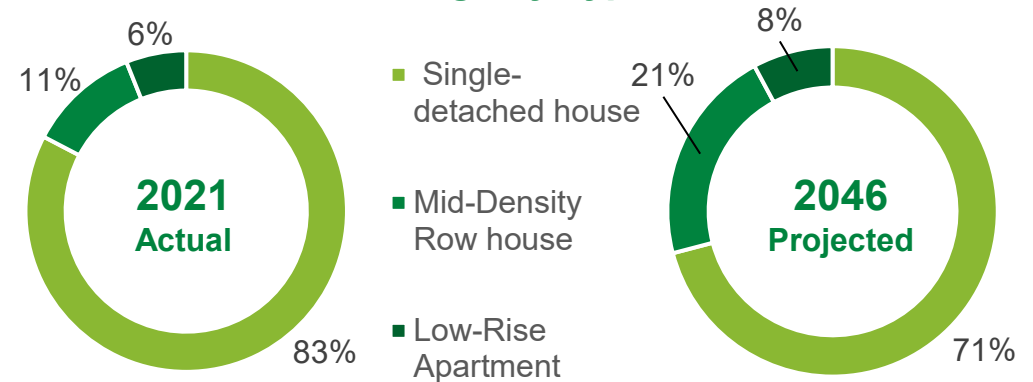
Medium Density housing includes row houses, duplexes, town homes and other attached dwellings. These houses are expected to triple in number, from 790 to approximately 2400 with 1600 units added by 2046, increasing their prevalence to 21% of total units.

High Density units including low-rise apartment buildings, with policies in place to encourage their growth, may become 8% of the total housing stock by 2046.

Total Projected Dwelling Mix, by Housing Type

5-Year Period, Ending	Total Dwellings	Single-detached house	Mid-Density / Row house	Low-Rise Apartment
2021	7045	5790	790	425
2026	7803	6296	972	488
2031	8651	6809	1218	567
2036	9513	7268	1522	657
2041	10387	7655	1894	758
2046	11345	7979	2388	883

Total Built Mix of Dwellings by Type



Housing Land Demand

Assumptions Regarding Land Use

The projections for housing growth to 2046 will create demand for development land. Municipal policies regarding housing typologies and the housing mix will affect the quantity of land required.

Historically, intensification and redevelopment in North Grenville has been shown to accommodate a small proportion of new development. Growth within the Kemptville census area accounts for just 18% of total new dwellings between 2016-2021, which suggests that most new development takes place on undeveloped, or greenfield, sites.

To develop estimates of land demand for new housing development, the following assumptions of average gross dwelling units per Hectare are used for new developments:

- Single-Detached House 18 dU/Ha
- Mid-Density Row House 30 dU/Ha
- Low-Rise Apartment 45 dU/Ha

3-Year Projections for Housing Demand

Housing demand over 3 years is expected to be approximately 454 new housing units. Development permits have already been issued for 1790 new dwelling units, of which 244 are expected to be built by 2024, leaving a gap of 210 units to be built between 2024 and 2026.

New Development Land Projections

5-Year Period Ending	Single detached area, Ha	Mid-density area, Ha	Apartment Area, Ha	Total Land, Ha	Cumulative Land, Ha
2026	28.1	6.3	1.4	35.8	35.8
2031	28.5	8.5	1.8	38.8	74.6
2036	25.4	10.5	2.0	37.9	112.5
2041	21.6	12.8	2.3	36.6	149.1
2046	18.0	17.0	2.8	37.7	186.9
Total	121.6	55.1	10.2	186.9	186.9

15 Year Projections for Land

Land use projections above suggest that demand for housing will be approximately stable in each 5-year period for the next 25 years – averaging between 35 and 39 ha. A total of 112.5 Hectares of developable land are projected to be required for housing by 2036.

Employment and Commercial Land Demand

The Employment Trends identified in Section 3 of this report will have an impact on demand for Commercial development land.

This section further assesses those trends for their relationship to land development, to anticipate demand for commercial land over time.

Highway-Oriented Commercial and Industrial

There has been recent growth in logistics-based business within the City of Ottawa, including an Amazon fulfilment centre approximately 27 kms north of North Grenville that opened in 2022. Development land continues to be available within Ottawa that can support future demand for warehousing and industrial uses closer to the urban core.

Highway-oriented commerce and industry may therefore grow to reach North Grenville in the longer-term. The Municipality may plan servicing to accommodate commercial and industrial development, for example on designated lands to the East of Hwy 416, in that timeframe.

Distance Work and the Knowledge Economy

The knowledge economy sectors, include remote work, with employees living in North Grenville without a physical workplace outside of the home or with occasional commutes to workplaces in Ottawa. Growth in remote work can be expected to further increase housing demand, without corresponding growth in employment land demand.

Retail trade and Services

Given the presence of new commercial spaces such as the Kemptville Colonnade and low expected growth in retail, it is expected that there will be little additional demand for new commercial land in the near term.

Growth in senior-oriented services, including in Healthcare, may be a specific growth sector. Some seniors services will be co-located with seniors residences. Private clinics and other seniors support facilities, may be accommodated in part within existing commercial development areas, including the Downtown Commercial and Highway Commercial designated lands within Kemptville.

Overall Employment and Commercial Land Demand

The city's *2017 Long-term Population, Housing and Employment Forecast* suggests that 1-2 Hectares may be expected to be developed on average per year. Recent trends do not suggest major shifts to this forecast rate of growth.

Cumulatively, this points toward an approximate demand for less than 40 Ha of new Commercial development lands in North Grenville over the 25-year period.

5-Year Period, Ending	Employment & Commercial Land Demand, Ha
2026	7.5
2031	7.5
2036	7.5
2041	7.5
2046	7.5
Total	37.5 Ha

04

Housing and Land Supply Analysis

Housing and Land Supply Analysis



North Grenville has seen **rapid housing development** since 2011, which has largely kept pace with the growth in population. In addition to a vast rural area, there is developable land across the Municipality's eight Hamlets and the Kemptville urban service area, for both residential and economic uses.

An assessment of available land supply demonstrates how North Grenville can accommodate its projected growth in population and resulting demand for housing and land development.

The municipality has adopted policies to focus growth within the Urban Boundary, which currently encompasses the Kemptville urban service area and eight Hamlets. This section assesses the potential for currently designated and zoned areas to address new housing, employment and commercial land development.

The Municipality is expanding infrastructure to accommodate future growth within the urban service area. It currently has a Water and Wastewater Master Plan, published in 2015, which assesses the major investments in municipal infrastructure that will be required to provide services to these development sites.

The servicing capacity described in that report was assessed against projected growth within the urban service area.

The Municipality currently has two types of underdeveloped land available within the urban boundary designated for residential use:

- Rural lots, located in 8 Hamlets spread across the Municipality, and
- The Northwest Quadrant of the Kemptville urban service area.

Rural lots require on-site servicing for water and sewer. For this reason, a gross density of 1 unit per Hectare is used to estimate the development potential within the Hamlets, as explained following.

Within the urban service area, development capacity is calculated for densities of 18 and 45 units per hectare, corresponding to Municipal minimum and maximum densities according to existing policies.

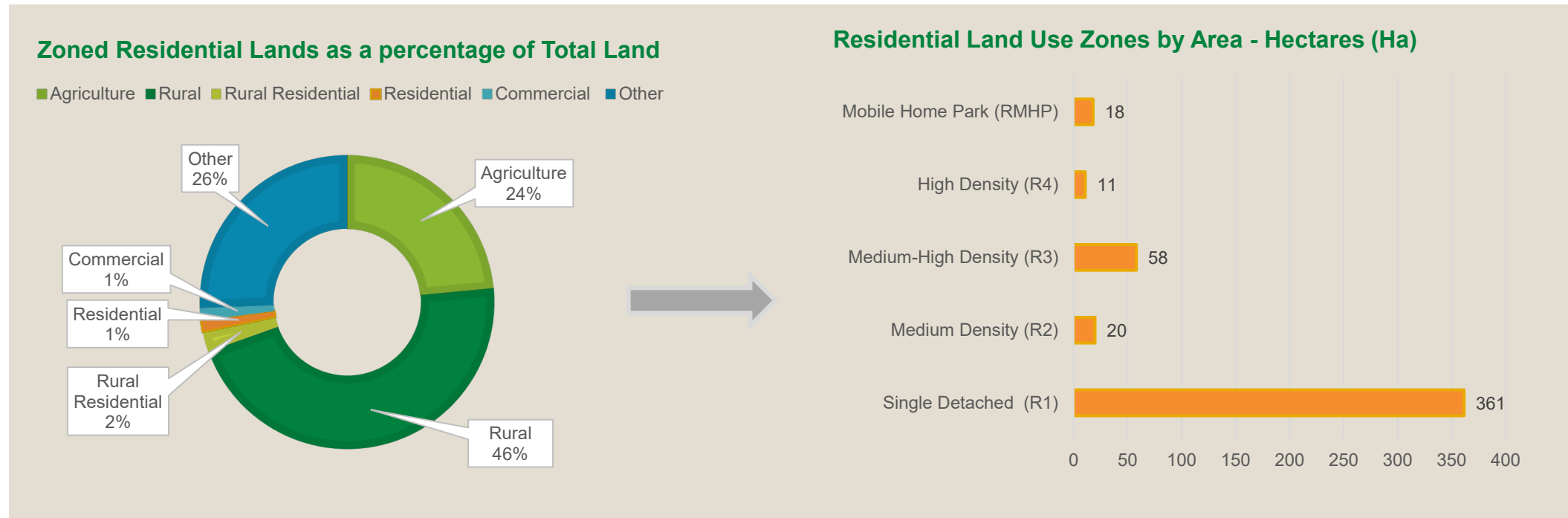
This provides the upper and lower estimates for the number of housing units that could be developed on any parcel.

Current State of Residential Land

Residential Land within the urban boundary accounts for 1% of North Grenville's total land area.

A geographic assessment of zoning and land use in North Grenville shows that in addition to the 1% of Residential land within the urban boundary, 2% of total land is zoned for rural residential use outside the urban boundary.

Among non-rural residential zones, single detached housing zone (R1) accounts for 77% of residential land area. Higher-density land uses, including RMHP Mobile Home Parks (4%), R2 Medium Density (4%), R3 Medium-High Density (12%) and R4 High Density (2%), together account for 22% of non-rural residential zones and less than 1% of total Municipal land area.



Sources: Municipality of North Grenville Spatial Data Geodatabase

Available Land: Hamlets

North Grenville has eight Hamlets, or small, local population centres, located across the Municipality. These Hamlets are within the urban boundary.

Together, these Hamlets present 456 Hectares of undeveloped or underdeveloped land that could accommodate future housing.

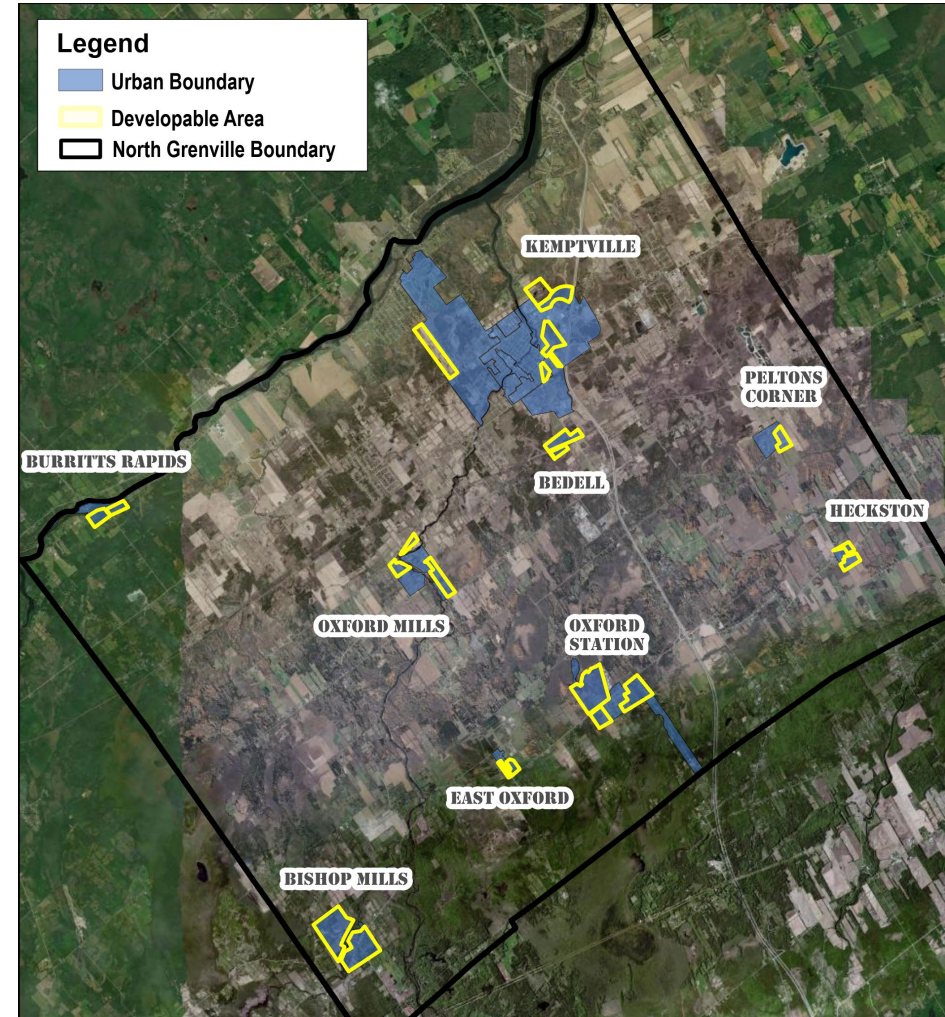
The Hamlets have their own Official Plan land use designation (“Hamlet”), and a variety of zoning. North Grenville’s Official Plan clarifies that the intent for the Hamlets is to preserve their character, and allow very low density development, consistent with Rural Residential zoning.

Higher density, urban development (consistent with the density targets in the North Grenville Official Plan and referred to earlier), would be inconsistent with the intended character of the Hamlets.

For the purposes of this study, rural residential development that is in keeping with the character of the Hamlets is assumed to occur at approximately 1 unit per Hectare.

This is less dense than the minimum lot size of the Rural Residential zone, however, for estimating development potential this figure accounts for irregular lots, unserviceable or undevelopable sites, and non-housing uses including roadways, each of which limit total development potential.

Additional detail on these Hamlets is provided on the following page.



Available Land: Hamlets

As identified on the previous page, North Grenville includes eight Hamlets that together present approximately 456 Ha of vacant or underdeveloped land within the urban boundary. This land is currently suitable for rural residential housing that relies on on-premise site services, with an average gross lot size of 1 Ha. The



Bedell: 35 Ha



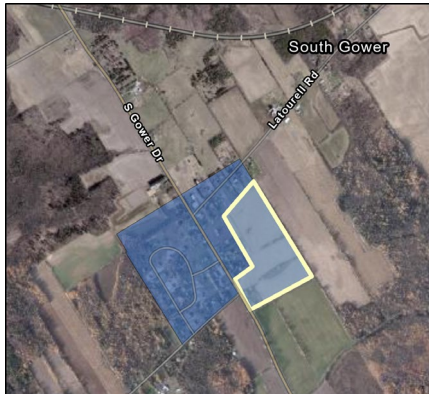
East Oxford: 14 Ha



Burritts Rapids: 29 Ha

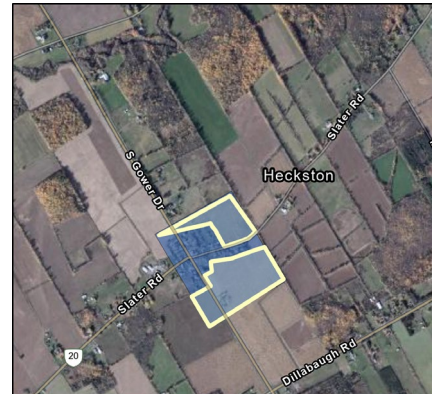


Oxford Mills: 47 Ha



Peltons Corner: 17 Ha

Source: Municipality of North Grenville Spatial Data



Heckston: 21 Ha



Bishop Mills: 151 Ha



Oxford Station: 142 Ha

 Hamlet Boundary

 Potential Developable Land


Available Land: Northwest Quadrant

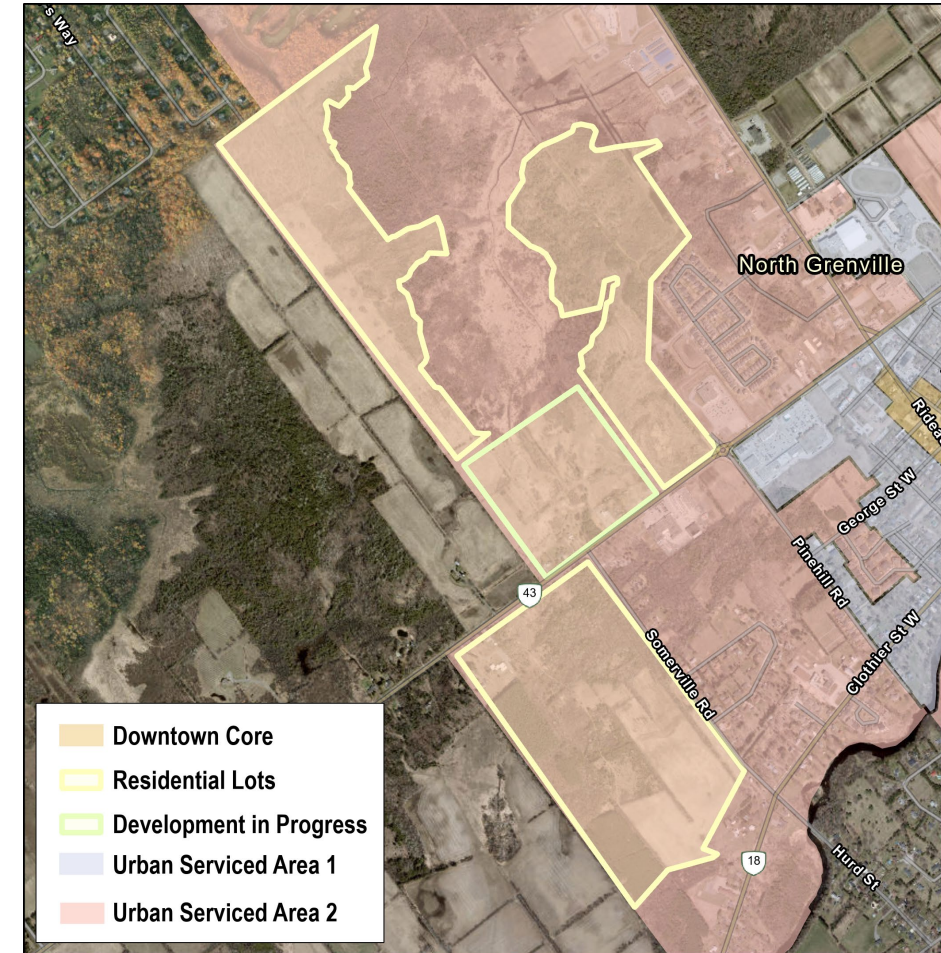
The Northwest Quadrant within urban service area 2 of Kemptville and has a total size of 106.5 hectares of residential land and 18.1 hectares of land with development in progress.

The development in progress, Oxford Village, is expected to provide 398 new dwellings at a density of 23 per hectare.

The development of this parcel has included upgrades to Municipal services that will make it possible to develop adjacent sites for residential use, as identified in yellow, right.

Excluding the approved housing under development, remaining development lands can reasonably accommodate either:

1,917 units  Single Detached
OR
4,792 units  Attached Dwellings



Sources: Calculations based on the Municipality of North Grenville Spatial Data Geodatabase

Residential Land Supply

An initial assessment of residential land available to accommodate future housing development

Currently, North Grenville has 456 Ha of underdeveloped land in the Hamlets, suitable for large-lot rural residential development, and 106 Ha of land in the Northwest Quadrant, suitable for urban development including single detached and denser forms of housing.

Together, these can potentially accommodate the development of between 1,370 and 5,248 new housing units. This is in comparison to the **projected need for 4,905 new dwelling units** over the 25-year planning horizon to 2046.

Several factors, such as proximity to transportation and urban centres, availability of municipal services, site-related development challenges, market demand and trends, and land ownership, all affect the patterns and timing of actual housing development, as well as the attractiveness of the sites. For example, lower proximity to Highway 416 and Kemptville and other factors reduce the attractiveness of some of the Hamlet sites for development.

Similarly, in the Northwest Quadrant, site-related challenges including nearby ecologically sensitive areas, proximity to local transportation links, and site servicing costs mean that uptake of all available developable land may not occur within the planning timeframe.

Hamlets	Developable Area, Ha	Housing Units, Max Est.	Proximity* to Kemptville	Proximity* to Highways
Bishop Mills	151	151	Low	Low
Burrits Rapids	29	29	Low	Low
East Oxford	14	14	Low	Medium
Heckston	21	21	Low	Medium
Oxford Mills	47	47	Medium	Medium
Oxford Station	142	142	Low	High
Pelton's Corner	17	17	Medium	Medium
Bedell	35	35	High	High
Total	456	456	-	-

*Low < 3 km; 3km < Medium < 10 km; High > 10 km

Candidate Area	Area, Ha	Dwellings, Low Est.	Dwellings, High Est.	Proximity to Hwy 416	Water Sewer Services	Official Plan Designation	Current Zoning	In Urban Boundary
Northwest Quadrant	106.5	1,914	4,792	Mid	Planned	Residential	Rural	Yes

Employment & Commercial Land Supply

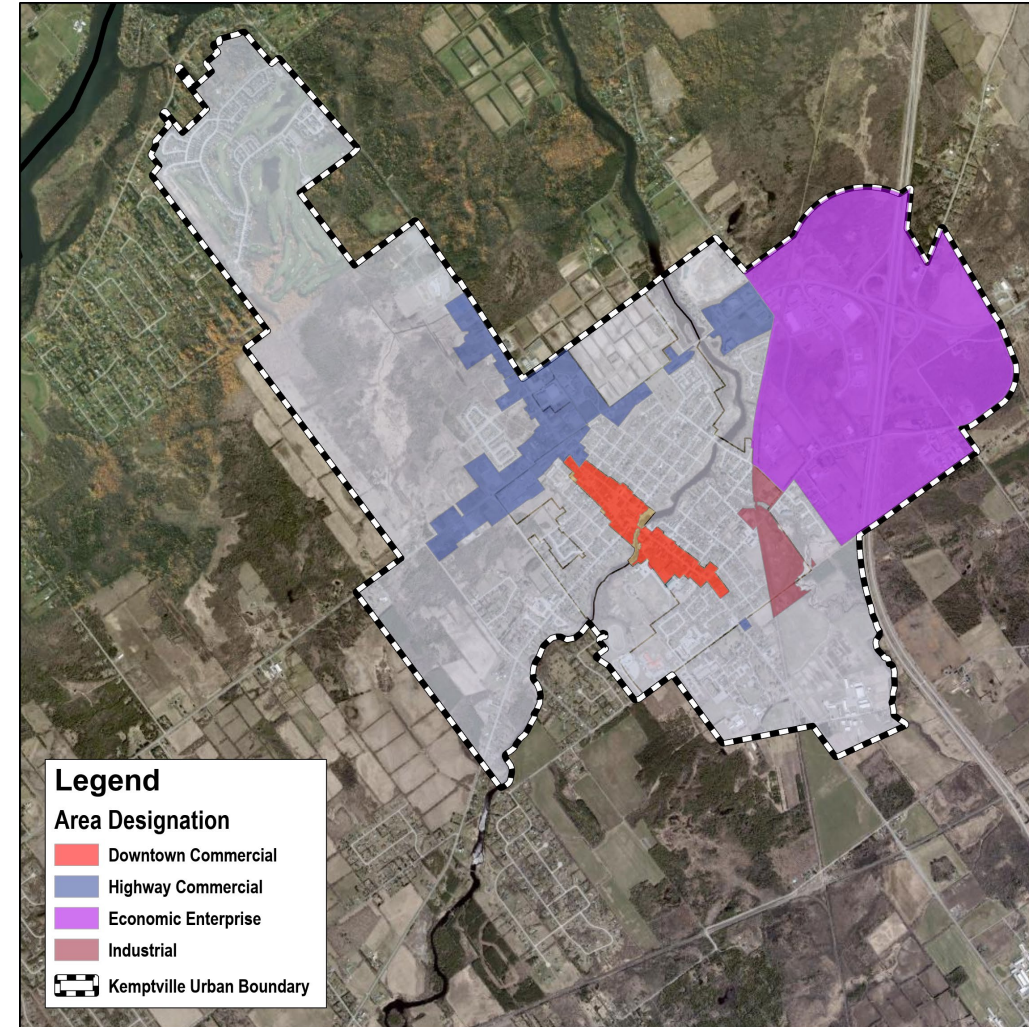
The Municipality's Official Plan includes four main employment and commercial land use designations:

- **Downtown Commercial**, consisting of small lots for businesses in the historic centre of Kemptville
- **Highway Commercial**, along Rd 43 that include local and regional businesses such as warehouses and strip malls,
- **Economic Enterprise**, located east of Kemptville spanning Hwy 416, with large commercial enterprises and many undeveloped lots.
- **Industrial**, located in the southeast of Kemptville.

The Economic Enterprise area includes 18 Ha of serviced but undeveloped land between Hwy 416 and Kemptville. It also includes unserviced, undeveloped land east of the highway. A review of land development status shows that at least 100 Ha of lands designated for industrial and commercial use remain undeveloped.

Given the demand for employment and commercial land analyzed in the previous chapter, the Municipality may have in excess of 60 Hectares of land designated for employment and commercial uses that is unlikely to be developed by 2046. This suggests that serviceable employment and commercial land is available to be repurposed for other uses in the near term.

The next chapter explores opportunities to redesignation / rezone lands for residential use. Some of these opportunities are for lands included in employment and commercial lands shown on the map to the right.



Employment & Commercially Zoned Lands

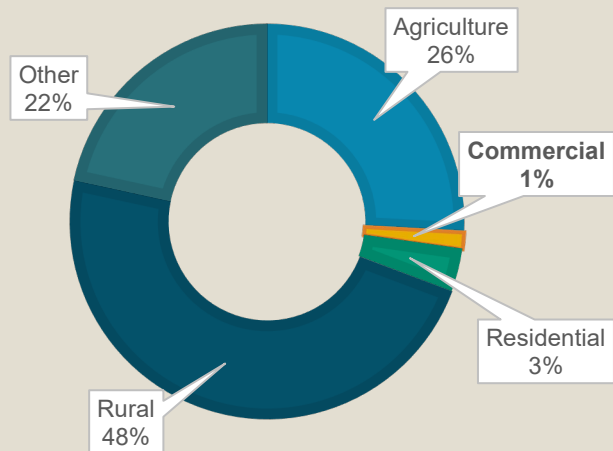
Employment and Commercial Land accounts for 1% of North Grenville's total land.

Approximately 486 hectares of land in North Grenville are zoned for commercial and industrial uses. Of this, 147 Ha are zoned Highway Commercial, 143 Ha Tourist Commercial and 127 Ha Business Enterprise. Other employment zones include Downtown Commercial and specialized commercial and industrial uses suited to local economic contexts.

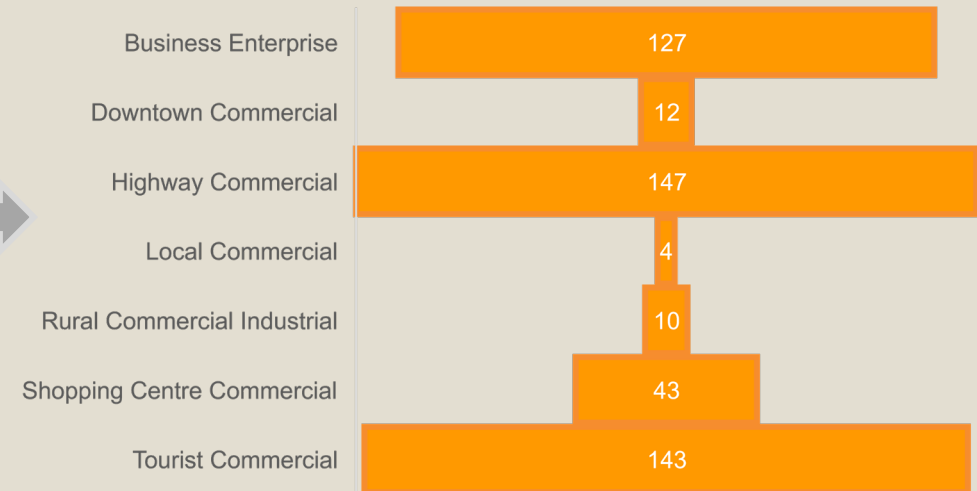
Recent developments in the Business Enterprise area include a seniors residence. The Kemptville Colonnade commercial centre is expected to accommodate much of the major commercial demand for the near-term. There are also re-zoning applications in process to convert industrial land for residential use. The low rate of uptake of available serviced employment and commercial lands, indicate lower demand for this land and the potential for redesignation, as explained in Section 4.

Employment & Commercial Land %

■ Agriculture ■ Commercial ■ Residential ■ Rural ■ Other



Employment & Commercially Zoned Land Area (Ha)



Sources: Calculations based on the Municipality of North Grenville Spatial Data Geodatabase

Water and Wastewater Servicing

Water Servicing

According to the *North Grenville Potable Water and Wastewater Master Plan Update* issued by Stantec, in 2015, just 27% of North Grenville's dwelling units were connected to the Municipal potable water system, with an estimated 1,902 household connections. Since then, new wells have increased the potable water supply in line with growth.

Three expansions to the water supply, as new wells providing a total of 6,000 m³ of additional raw water capacity, are still required to meet a projected total serviced population of 15,152, as projected by Stantec using a high assumed rate of growth. The report recommends installing new wells in 2024, 2028, and 2033 with pump stations connecting these wells to the serviced area.

Population projections in Section 3 of this report suggest that if 70% of new growth is connected to the Municipal water supply, the total population served by the Municipal water supply will approach but not surpass 15,152 by 2046. Additional water supply capacity will be required to meet this projected growth, as explained in the Stantec report.

Wastewater Servicing

The 2015 *Water and Wastewater Master Plan* estimated that the existing wastewater treatment plant would reach capacity by 2027, with a serviced population of 10,279 persons with average daily flows of 4,510 m³. An expansion to the Water Pollution Control Plant is underway, to increase average daily flow capacity by an additional 5,250 m³ per day, of which 250 m³ are allocated to the new Eastern Ontario Correctional Complex.



The expansion may reasonably be expected to double the capacity available to accommodate growth. If so, this meets the expected wastewater servicing needs of the projected population to 2046.

Based on the estimated rate of growth in the urban service area, continued attention to the potable water servicing plan and implementing its capacity expansion recommendations is advised.

05

Redesignation / Rezoning Opportunities



Additional Housing Development Land

Additional serviced and unserviced lands within and adjacent to Kemptville may serve as candidates to accommodate future housing demand. Further analysis and community consultation will be required, to confirm *if and when* these lands may be redesignated or re-zoned for housing development.

Population growth projections and persistent residential development pressures are driving the Municipality to be proactive and timely in identifying candidate sites for future housing development.

Planning at this stage gives the municipality the ability to identify areas for potential future development, with adequate time to engage in public discussions and detailed evaluation of these as development options. This section serves as an initial scan of possible areas for future development, with high level criteria to assess housing development potential.

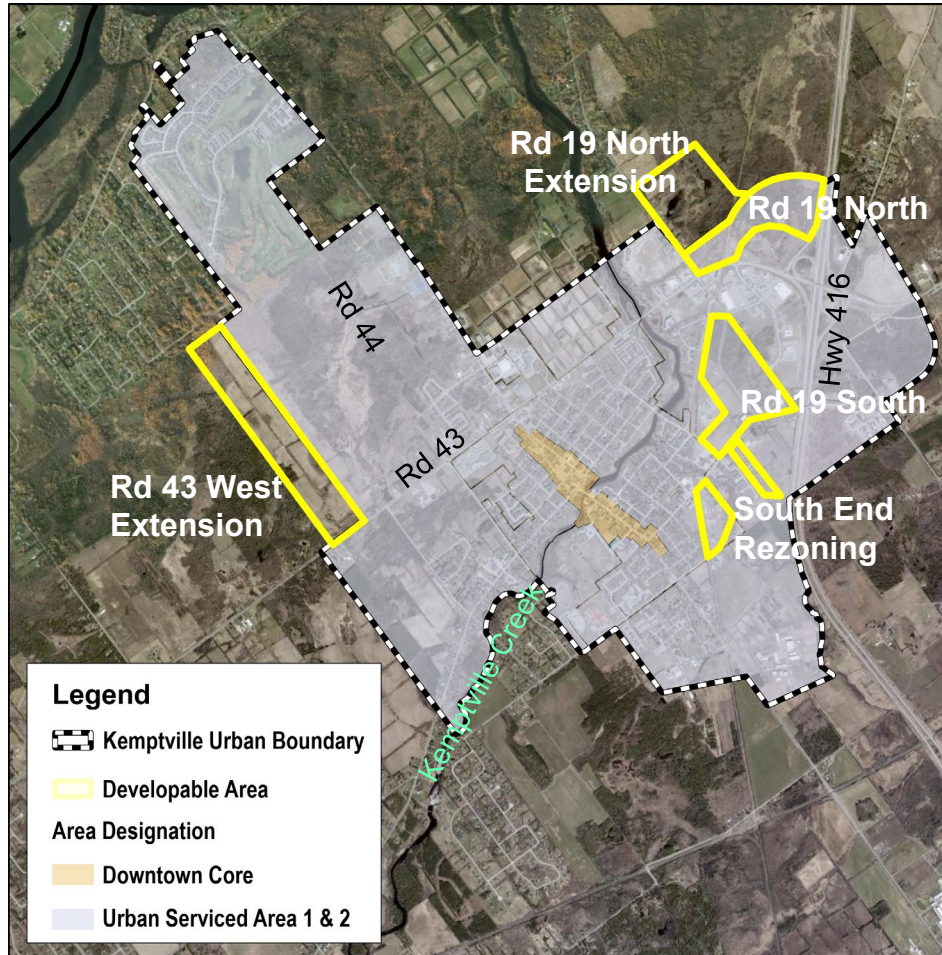
Five candidate locations may serve for future residential development in and around the Kemptville urban service area. In total, these amount to approximately 250 Hectares of developable land.

Candidate lands were selected for analysis based on the following characteristics:

- Within or adjacent to the Urban Boundary
- Adjacent to existing or planned water and sewer services
- Near major transportation corridors, notably Hwy 416
- Of adequate size to consider for policy action (over 10 Ha)
- Current official plan designation and zoning that is **NOT** housing

A summary of the candidate development areas and a high-level analysis of each location is provided in the following pages. This is intended to be a first step prior to further in-depth analysis and public engagement.

Potential New Urban Development Areas



Using the criteria listed on the previous page, North Grenville identified five additional sites that may be candidates for redesignation or re-zoning, to accommodate future housing growth.

These lands are presented in this section with a preliminary suitability analysis and a summary analysis at the end of the section.

Density and Land Development Capacity

Each of the five development areas are evaluated for their housing development capacity. Total unit numbers are based on gross density, which allows space for public services, rights of way, parks, and non-housing portions of parcels such as yards and service buildings.



Low density, mainly single detached dwellings, calculated at a gross density of **18 units per Hectare**.

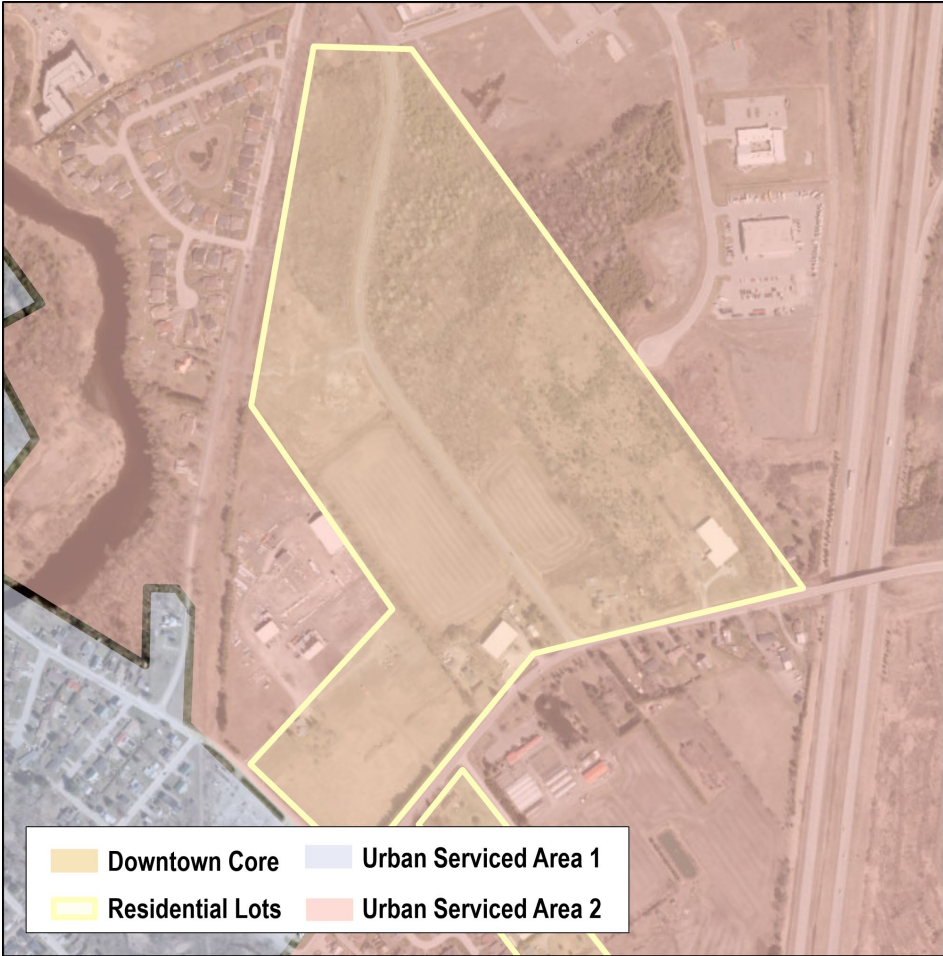


High density, mainly low-rise apartments or stacked townhomes, are calculated at a gross density of **45 units per Hectare**.

Further characterization is presented based on each site's proximity to Hwy 416, its current Official Plan designation and zoning, and a summary of nearby development types.

This provides a high level overview of these sites, as candidates for more detailed consideration according to Municipal requirements.

Rd 19 South



Sources: Calculations based on the Municipality of North Grenville Spatial Data Geodatabase

Rd 19 South is within the urban service area of Kemptville and has a total size of 31.1 Hectares. This can accommodate, at low and high estimates, either:

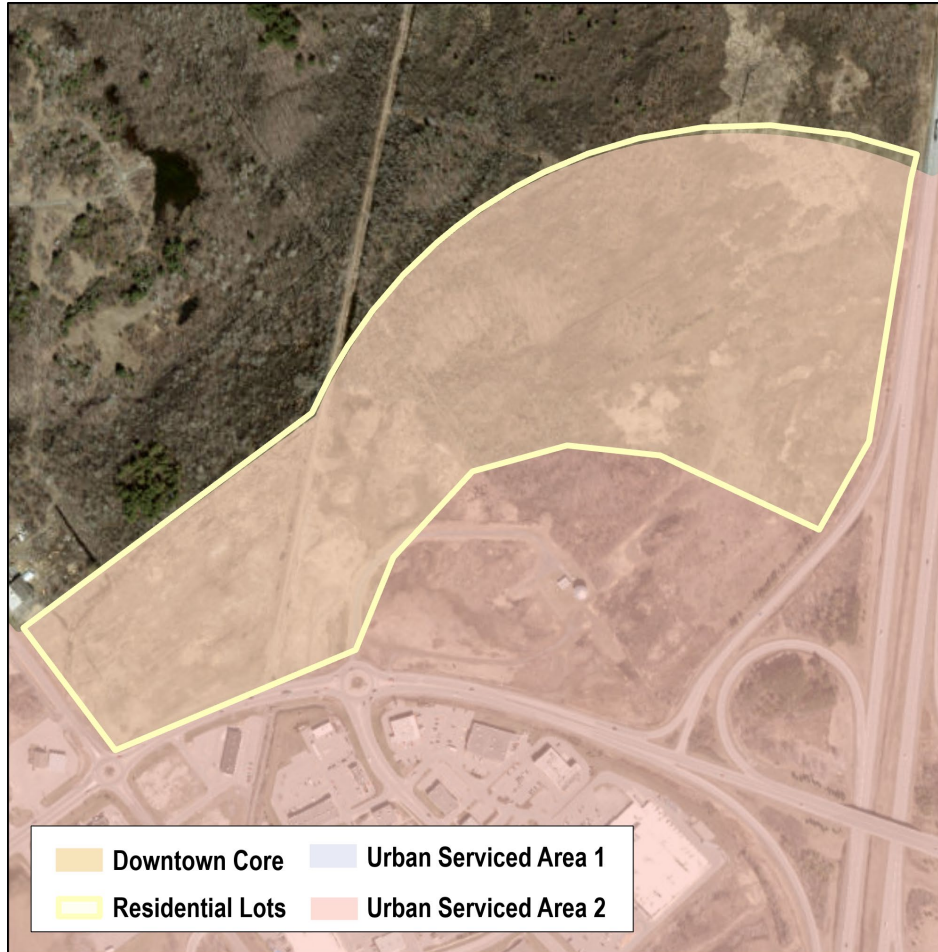
560 units  Low-density, single detached OR

1,400 units  Higher-density, attached dwellings

or a combination of detached and attached dwellings, with total dwelling unit numbers falling within that range.

Within Urban Boundary	Yes
Official Plan Designation	Economic Enterprise
Zoning	Commercial
Water / Sewer Servicing	Partial / Planned
Proximity to Hwy 416	High
Nearby Development	Employment and commercial

Rd 19 North – Parcel 2



Rd 19 North – Parcel 2 is within urban service area 2 of Kemptville and has a total size of 30.6 Hectares. This can accommodate, at low and high estimates, either:

551 units



Low-density, single detached OR

1,377 units



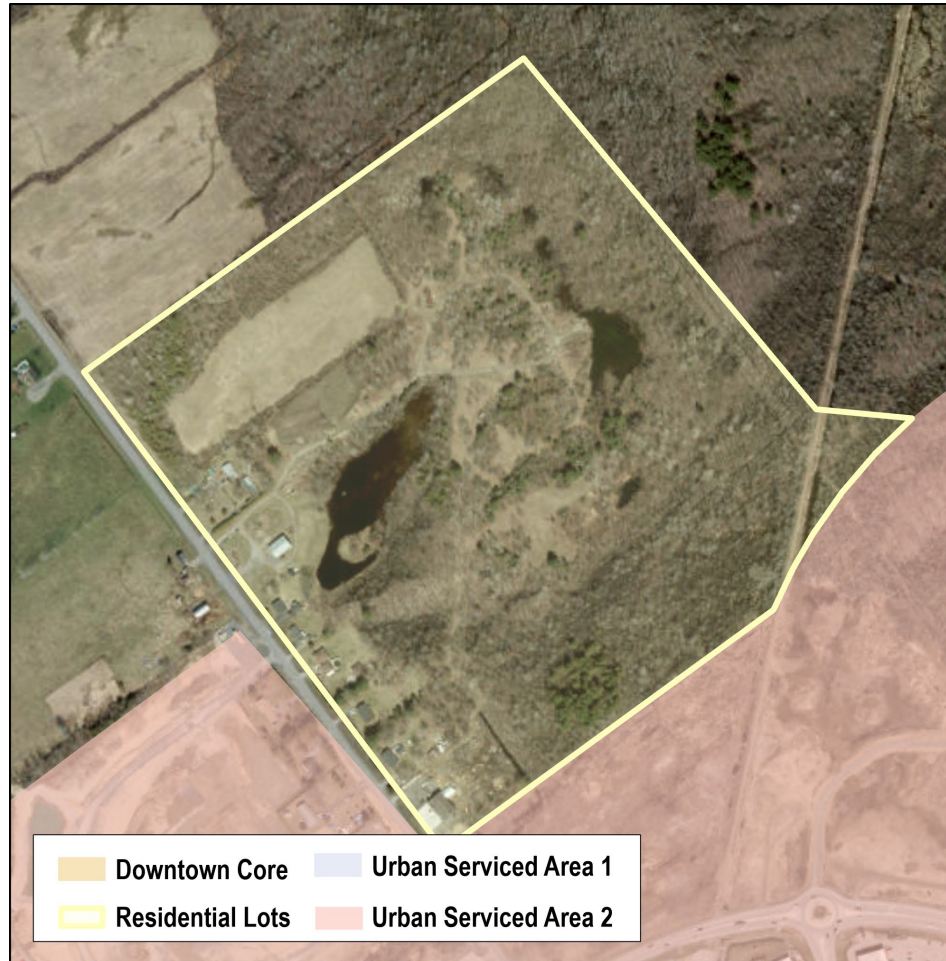
Higher-density, attached dwellings

or a combination of detached and attached dwellings, with total dwelling unit numbers falling within that range.

Within Urban Boundary	Yes
Official Plan Designation	Economic Enterprise
Zoning	Commercial, Institutional
Water / Sewer Servicing	Partial
Proximity to Hwy 416	High
Nearby Development	Employment and commercial, Rural

Sources: Calculations based on the Municipality of North Grenville Spatial Data Geodatabase

Rd 19 North Extension



Rd 19 North Extension is outside the urban service area of Kemptville and has a total size of 30.6 Hectares. This can accommodate, at low and high estimates, either:

502 units



Low-density, single detached OR

1,256 units



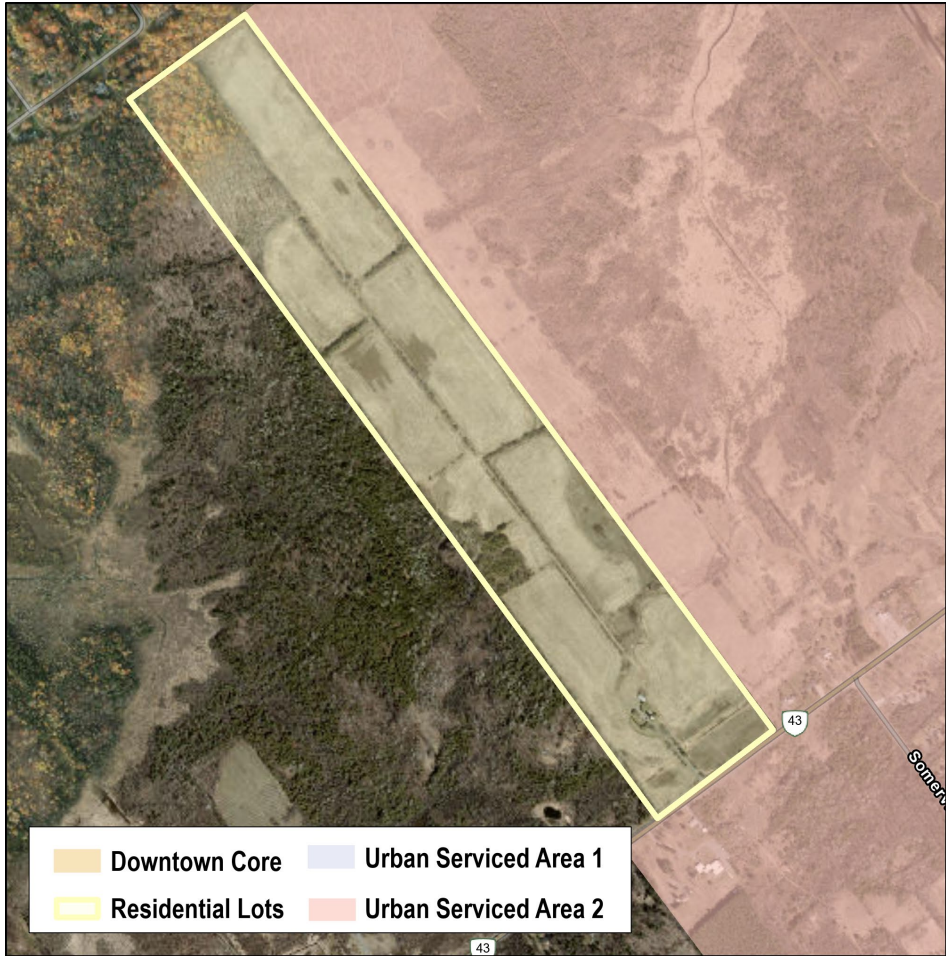
Higher-density, attached dwellings

or a combination of detached and attached dwellings, with total dwelling unit numbers falling within that range.

Within Urban Boundary	No
Official Plan Designation	Rural
Zoning	Rural, Industrial
Water / Sewer Servicing	Planned
Proximity to Hwy 416	High
Nearby Development	Rural, Employment and commercial

Sources: Calculations based on the Municipality of North Grenville Spatial Data Geodatabase

Rd 43 West Extension



Sources: Calculations based on the Municipality of North Grenville Spatial Data Geodatabase

Rd 43 West Extension is outside the urban service area of Kemptville and has a total size of 40.5 Hectares. This can accommodate, at low and high estimates, either:

729 units



Low-density, single detached OR

1,823 units

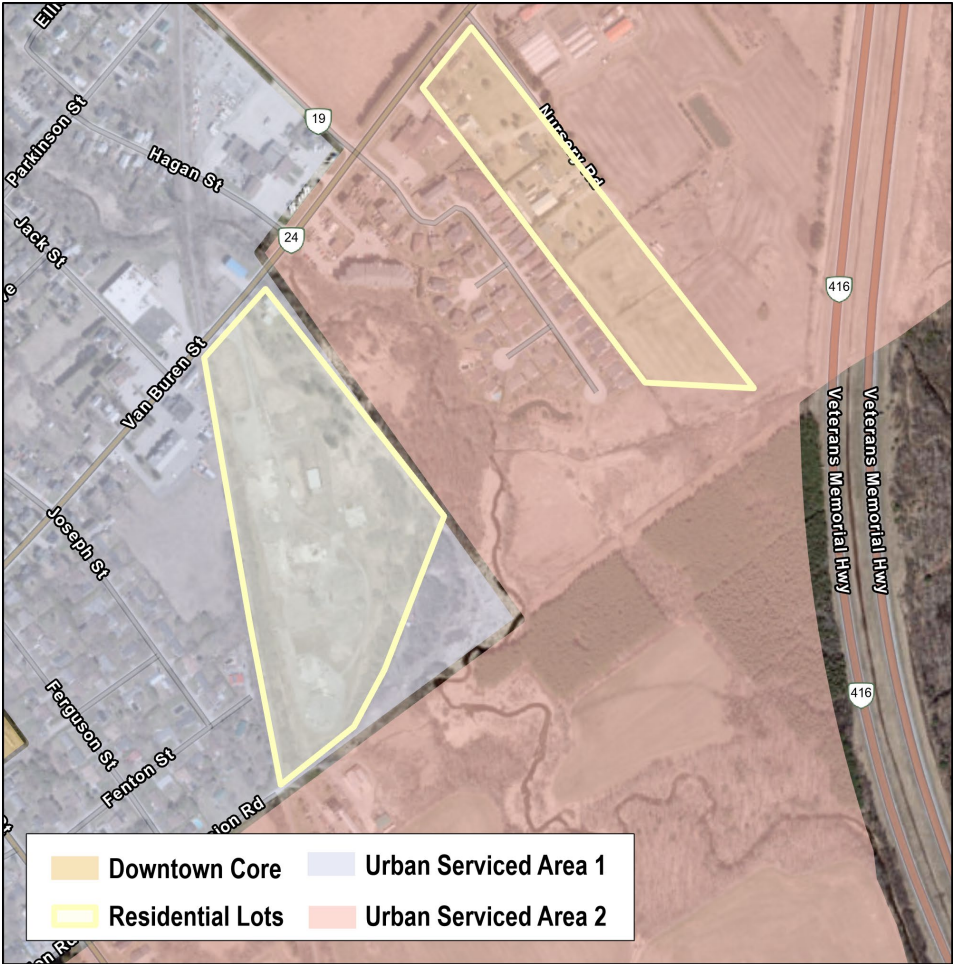


Higher-density, attached dwellings

or a combination of detached and attached dwellings, with total dwelling unit numbers falling within that range.

Within Urban Boundary	No
Official Plan Designation	Rural
Zoning	Rural
Water / Sewer Servicing	None
Proximity to Hwy 416	Medium
Nearby Development	Rural, Single detached dwellings

Southeast Area



Sources: Calculations based on the Municipality of North Grenville Spatial Data Geodatabase

Southeast Area is within the urban service area of Kemptville and has a combined total size of 11.2 Hectares. This can accommodate, at low and high estimates, either:

202 units



Low-density, single detached OR

506 units



Higher-density, attached dwellings

or a combination of detached and attached dwellings, with total dwelling unit numbers falling within that range.

Within Urban Boundary	Yes
Official Plan Designation	Industrial, Economic Enterprise
Zoning	Commercial, Industrial
Water / Sewer Servicing	Yes
Proximity to Hwy 416	Medium
Nearby Development	Single detached dwellings, Industrial

Housing Land Supply Summary

The development model indicates 4,905 new dwelling units will be needed by 2046, an average of 196 per year.

Even if bylaws are changed to permit development on the lands identified in this section of the study, it will take time for the development to occur, and not all available lands will be developed at once. This means the developable land capacity shown below is significantly higher than demand expected over the planning horizon.

The Municipality and members of the community will need to discuss the parcels to be considered urban boundary extensions and for proposed redesignations and rezoning.

The purpose of identifying options for the urban boundary expansion, redesignation, and rezoning, is to identify options to accommodate projected growth in a reasonable manner.

If the urban boundary is to be expanded, the Municipality will need to undertake a Comprehensive Review, to demonstrate both the need, and rationale for the locations of the urban boundary expansion. This includes additional analysis of municipal policy priorities, servicing plans, and community needs among others.

Candidate Area	Area, Ha	Dwellings, Low Est	Dwellings, High Est	Proximity to Hwy 416	Water Sewer Services	Official Plan Designation	Current Zoning	In Urban Boundary
Hamlets	456	456	456	Low	Lot	Hamlet	Rural	Yes
Northwest Quadrant	106.5	2,241	5,603	Mid	Planned	Residential	Rural	Yes
Rd 19 South	31.1	560	1,400	High	Partial	Econ Ent	Commercial	Yes
Rd 19 North – Parcel 2	30.6	551	1,377	High	Planned	Econ Ent	Com / Inst	Yes
Rd 19 North Extension	27.9	502	1,256	High	Planned	Rural	Rural	No
Rd 43 West Extension	40.5	729	1,823	Mid	No	Rural	Rural / Ind	No
Southeast Area	11.2	202	506	High	Yes	Ind / Econ	Com / Ind	Yes
Total	704.3	5,241	12,421	-	-	-	-	-

Development Policy Responses

North Grenville has identified and is undertaking a set of reforms, including incentives for additional dwelling units, site servicing, zoning and process improvements, to boost housing affordability.

In tandem with these reforms, North Grenville has the following policy options concerning specific issues identified in this report. Policies to address the growth in demand for housing among seniors, persistent affordability challenges, and longer-term growth among families include:

Zoning for senior-oriented development: Fast-track re-zoning for senior-oriented development, including independent and supportive living, community-wide. Consult with communities to create simplified site and development criteria, potentially within a new Zone (R5), to clarify re-zoning and variance requirements for qualifying housing types.

Affordability incentives: Provide incentives to encourage the development of affordable housing, especially rentals, for young families and seniors. Consult and review leading practices to develop incentives, development cost charge deferrals, inclusionary zoning, and/or density bonuses, for new housing construction with criteria based on affordability.

Seniors relocation benefit: As a senior, moving homes can be expensive and challenging. While employees may benefit from the Federal Moving Expenses Deduction, most seniors are not eligible for this tax benefit. For that reason, the Municipality may consider a rebate on relocation costs for qualifying seniors currently residing in North Grenville, to aid with the burden of moving homes locally on a fixed income.

Current Housing Strategies in North Grenville

1. **Housing and Homelessness Plan 2014 - 2024:** Key strategies to help meet the housing needs of the communities.
2. **Mayor's Task Force on Affordable Housing:** 14 strategies to develop affordable housing
3. **Municipality of North Grenville Housing Strategy:** Defines the Municipality's role in developing housing

To support new development of housing and mixed-use neighbourhoods within the boundary of the Kemptville urban service area, policy options include:

By-Law Updates: Consult with the community and current land owners to develop updates to the Official Plan and Zoning By-Law to permit mixed-use and higher density housing at identified sites.

Transit Corridor Development: Growth in commuter-based employment will create demand for affordable, family-oriented housing with good highway and transit access, in addition to new suburban and rural homes.

Building types including stacked townhouses can be specified through minimum density requirements along designated transit corridors, such as Rd 19. This would increase the viability of transit, while creating housing and commuting options for this demographic group.

06

Conclusion and Next Steps

Conclusion and Next Steps

The Municipality of North Grenville will continue to see demographic pressures that drive rapid growth. It is likely growth in the municipality will continue to outpace growth in the in United Counties and in Ottawa.

The population growth rate over the last census period from 2016 to 2021 was 9.2%. Projections based on regional trends suggest that by 2046, the population could grow by 25%, averaging 10% growth for each 5-yr period. The Municipality must plan proactively for how and where this population growth will be accommodated.

This study concludes that North Grenville has sufficient land to accommodate projected growth to 2046, based on current land use designations and zoning. However, the Municipality will need to determine how and where this growth will take place. Key actions required to prepare for development pressures include:

- A need to prepare for growth coming from outside North Grenville but from within Ontario, especially from the Ottawa metro area.
- A need to prepare for an aging population, including a retiree influx into the Municipality and seniors ageing in the community.
- A focus on employment that considers growth in regional employment drivers and provides options for local economic development.
- Appropriate planning for development that is close to existing municipal services like highways, roads, water and wastewater.
- Policy interventions to support affordable housing.

With the right policy and urban planning responses, the community can meet its objectives for sustainability, affordability, and accessibility, in the way it houses its current and future population.

Appendices

Projected Population by Age

Aging Population

The projections show a significant increase in residents within the 75+ age groups over the next 25 years. On net, it is projected that by 2046 there will be 3,204 more seniors aged 75 to 84 and 3,367 more seniors aged 85+ living in North Grenville than there are currently. This is the most persistent demographic growth profile for the region.

Family Arrivals

A notable increase in the 0 to 14 age group starting in 2031 may suggest increasing numbers of young couples and families projected to be moving to North Grenville in the medium-term, with somewhat corresponding increases apparent in the 35 to 54 age group.

Projected 5-Year Change in Population by Age Group

Year Ending	0 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 to 84	85 Plus
2021*	240	-35	215	165	-370	350	615	275	60
2026	39	18	436	304	-449	-345	624	905	313
2031	289	-90	256	544	-147	-809	630	980	591
2036	414	63	98	496	484	-503	-314	810	848
2041	495	173	95	266	697	49	-754	691	788
2046	463	333	106	189	580	674	-372	-179	828
25-Year Net Change	1698	497	990	1799	1165	-934	-187	3207	3367

North Grenville 5-Year Growth (Scenario 2)

Year	Population	Pop Growth
2021*	17,964	1513
2026	20,845	2881
2031	23,088	2243
2036	25,483	2395
2041	27,980	2497
2046	30,602	2622

*Note that the 2021 figures represent actual housing demand, not forecast.

Data Sources and Citations

North Grenville Strategies, Plans and Studies consulted during this Study:

- Growth Analysis Peer Review, Watson, 2020
- Long-term Population, Housing and Employment Forecast, Watson, 2017
- Housing Strategy, SHS Consulting, May 2022
- Affordable Housing Strategy, Dillon, 2021
- Development Charges Background Study, Watson, 2019
- North Grenville Official Plan, 2018
- 10-Year Community Strategic Plan, 2023
- Groundwater Vulnerability Study, Golder, 2019
- Potable Water and Wastewater Master Plan Update, Stantec, 2015

Data sources used for analysis in this Study:

- Statistics Canada: Census Data 2011, 2016 and 2021 for North Grenville, Ottawa, and Ontario
- Statistics Canada Population Projections: Canada (2021 to 2068), Provinces and Territories (2021 to 2043)
- Province of Ontario, Ministry of Finance Population projections, 2022 to 2046
- Municipality of North Grenville land use data, official plan spatial boundaries, urban service area spatial boundary, zoning typology and spatial boundary.

Thank you

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