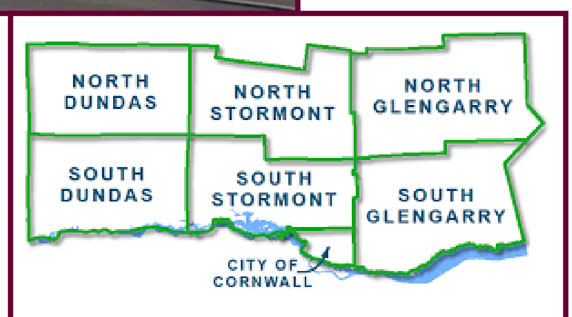
EMPLOYMENT LAND NEEDS ANALYSIS

Final Report



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March 29, 2016

EXECUTIVE SUMMARY

Hemson Consulting Ltd. was retained by the United Counties of Stormont, Dundas and Glengarry (SDG) to undertake an employment land needs analysis. The study builds on a population projections and residential land needs study prepared by Hemson in 2013 and will help to ensure that the County is planning for growth and employment lands in a manner responsive to local economic conditions and consistent with Provincial policy.

The study is undertaken within the context of the Provincial Policy Statement (PPS). The PPS articulates Provincial priorities and provides direction for appropriately managing growth and land use. An updated PPS came into effect in April 2014 which strengthens Provincial direction for employment lands planning.

SDG has experienced a trend of slow employment growth since 2001 with employment declining between 2006 and 2011 amidst a broader recession and shifting economy. The economy of SDG is largely tied to the broader eastern Ontario economy centred on the City of Ottawa and many SDG residents commute to work in the Cities of Ottawa and Cornwall, both of which influence the pattern of growth in the County.

The outlook for employment growth going forward in SDG is tied to a number of economic and demographic factors, including the broader economic outlook for eastern Ontario and the aging of the population. Updated forecasts have been prepared which are anticipating an overall net decline in SDG over a twenty year planning horizon. This does not mean that no growth or new development will occur but that the net effect over the long term is for less total employment in the County than there currently is today.

The County has over 450 gross ha of urban designated employment lands, which could accommodate a range of 3,200 to nearly 9,800 jobs County-wide at build-out.

There is no identified need to designate additional urban lands for employment at this time. However, the County should continue to monitor absorption and work to maintain an adequate supply of market-ready employment lands to provide for a range of employment uses and support economic development in SDG.

TABLE OF CONTENTS

List of Tables and Exhibits

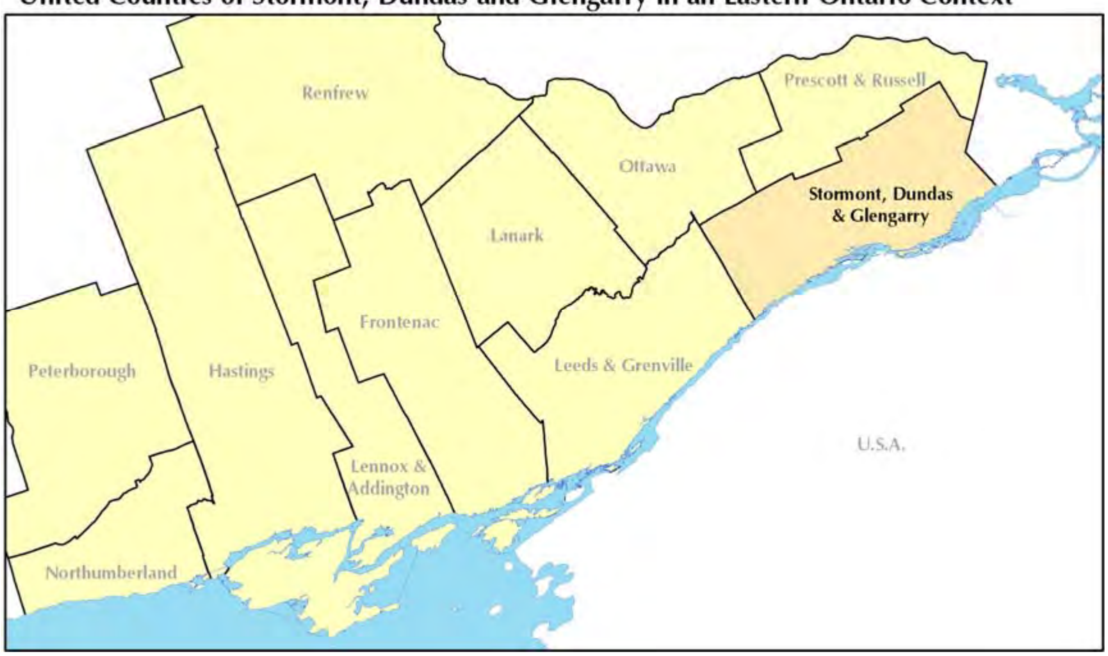
I INTRODUCTION

Hemson Consulting Ltd. has been retained by the United Counties of Stormont, Dundas and Glengarry (SDG) to undertake an employment land needs analysis. The study builds on a study of population projections and residential land needs prepared by Hemson in 2013. This update will help to ensure that the County is planning for growth and employment lands in a manner responsive to local economic conditions and consistent with Provincial policy.

A. BACKGROUND AND STUDY PURPOSE

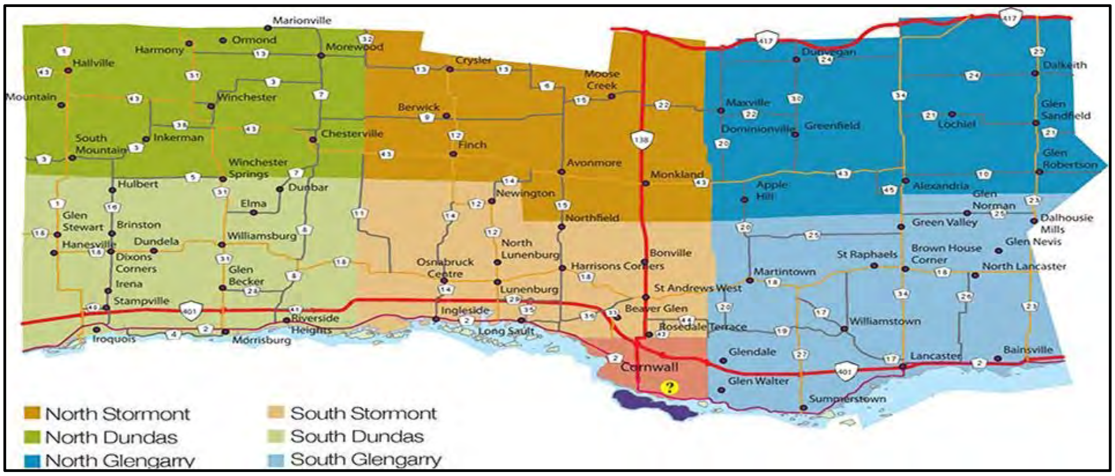
SDG is located in eastern Ontario and bordered by Quebec to the east, Prescott & Russell and the City of Ottawa to the north, Leeds Grenville to the west and New York State to the south.

United Counties of Stormont, Dundas and Glengarry in an Eastern Ontario Context



The County is an expansive, largely rural, upper-tier municipality, covering roughly 3,300 km^2 and comprising six townships with 70 settlement areas at the local level.

Local Municipalities in Stormont, Dundas and Glengarry



Source: The United Counties of Stormont, Dundas and Glengarry. http://www.sdgcounties.ca/government/municipalities.

Hemson prepared a *Population and Growth Projections* report for SDG in 2013. The report forecast population and housing growth from 2011 to a 2031 planning horizon, including an analysis of the capacity of the residential land supply. The study also reviewed a number of proposed settlement area boundary changes, most of which have since been implemented by the County. Among the changes to settlement area boundaries, was the addition of 90 ha of employment lands in the community of Morrisburg in South Dundas, in part to offset the loss of industrial lands under a Provincially Significant Wetlands (PSW) designation.

The purpose of this study is to examine the current supply of employment lands County-wide and within each municipality of SDG in the context of the County's long-range employment growth outlook, in order to assist the County in its planning for employment and employment lands over the long-term.

The City of Cornwall, while geographically within SDG, is administratively distinct from the County and thus is not part of this analysis aside from considering the influence it presents on surrounding SDG municipalities and its role in the local economy. All references to SDG and all table figures exclude Cornwall unless otherwise stated.

B. FRAMEWORK FOR ANALYSIS

Planning in SDG is undertaken within the Provincial policy framework for managing growth and land use and is guided by the Provincial Policy Statement (PPS). The PPS articulates Provincial priorities and provides direction for appropriately managing growth and land use. In April 2014 the Province released an updated PPS which strengthens Provincial direction for employment lands planning. The updated PPS places an increased emphasis on the protection of employment areas in proximity to goods movement corridors, support of longer-term planning for employment areas and the promotion of investment-ready communities.

Local planning decisions must be consistent with the PPS direction. Key themes guiding the planning for employment lands include:

- economic development and promoting competiveness through the provision of suitable sites for a range of employment and economic uses;
- supporting the needs of existing and future businesses; and
- ensuring the necessary infrastructure to meet current and projected needs (s1.3.1).

Specifically, when planning for employment areas:

- 1.3.2.1 Planning authorities shall plan for, protect and preserve employment areas for current and future uses and ensure that the necessary infrastructure is provided to support current and projected needs.

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

- 1.3.2.3 Planning authorities shall protect employment areas in proximity to major goods movement facilities and corridors for employment uses that require those locations.

- 1.3.2.4 Planning authorities may plan beyond 20 years for the long-term protection of employment areas provided lands are not designated beyond the planning horizon identified in policy 1.1.2.

Provincial policy direction is implemented at the County and local municipal level through the *United Counties of Stormont, Dundas and Glengarry Official Plan*, local official plans and other growth management and planning initiatives. This analysis considers the outlook for employment growth and associated land needs in order to support the County and its local municipalities in planning for employment to ensure an adequate and appropriate land supply that supports healthy economic growth over the long-term.

C. REPORT CONTENTS

The balance of this report is organized as follows:

- Section II examines historical and recent growth and change in the employment base;
- Section III provides the results of the updated County-wide and local employment forecasts;
- Section IV indicates the updated employment land supply inventory and results of an employment growth capacity analysis; and
- Section V presents conclusions and recommendations for planning for employment lands and economic growth in SDG.

II EMPLOYMENT GROWTH HAS SLOWED IN SDG OVER RECENT CENSUS PERIODS

Employment growth has been variable in SDG since the 2000s with an earlier steady growth trend slowing and employment declining since 2006 amidst a broader recession and shifting economy. The economy of SDG is largely tied to the broader eastern Ontario economy centred on the City of Ottawa. The Cities of Ottawa and Cornwall both strongly influence growth patterns in the County and are where many SDG residents commute to work. This section provides an overview of recent growth and change and employment trends in the County.

A. HISTORICAL GROWTH

Employment growth has slowed and become more variable in SDG over recent Census periods. As shown in Table 1 below, steady growth over the 1990s was followed by a slower growth period between 2001 and 2006 and declining employment between 2006 and 2011. The decline in the latter period, owing in large part to recession and a general decline in Eastern Ontario's manufacturing base, was experienced by many communities throughout the Province.

Table 1

Total Place of Work Employment
Stormont, Dundas and Glengarry, 2001 - 2011

Year	POW Employment	Growth	Compound Annual Growth Rate
1991	18,200	—	—
1996	19,400	1,200	1.29%
2001	21,000	1,600	1.60%
2006	21,700	700	0.66%
2011	19,800	(1,900)	-1.82%

Source: Statistics Canada.
Figures are rounded.

The overall net change in employment has been characterized by significant variation at the local municipal level. Table 2 indicates change in total Place of Work employment by Township from 2001 to 2011.

Table 2 Total Place of Work Employment by Local Municipality Stormont, Dundas and Glengarry, 2001 - 2011							
Municipality	**Place of Work Employment**			**Growth**		**Compound Annual Growth Rate**	
	2001	**2006**	**2011**	**2001-06**	**2006-11**	**2001-06**	**2006-11**
South Glengarry	3,080	4,830	3,310	1,750	(1,520)	9.4%	-7.3%
North Glengarry	4,770	3,600	3,960	(1,170)	360	-5.5%	1.9%
South Stormont	2,910	2,820	2,640	(90)	(180)	-0.6%	-1.3%
North Stormont	1,830	1,690	1,990	(140)	300	-1.6%	3.3%
South Dundas	4,090	4,160	3,660	70	(500)	0.3%	-2.5%
North Dundas	4,300	4,630	4,210	330	(420)	1.5%	-1.9%
UCSDG	**21,000**	**21,700**	**19,800**	**700**	**(1,900)**	**0.7%**	**-1.8%**

Source: Statistics Canada

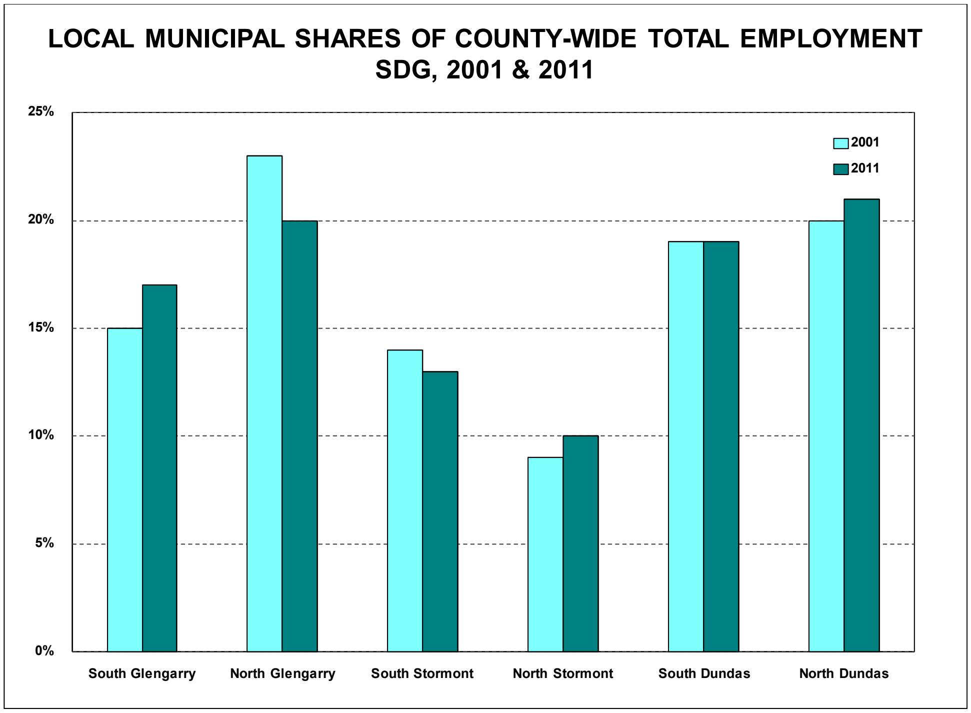
**Place of Work Employment includes No Fixed Employment re-allocated.

The net 700 jobs added County-wide between 2001 and 2006 included varying levels of growth and decline among SDGs municipalities. For example, the addition of over 1,700 jobs in South Glengarry occurred alongside a nearly reciprocal decline in North Glengarry. The municipalities of North and South Stormont also experienced declines in employment over the earlier part of the Census decade while North and South Dundas grew modestly.

In the 2006 to 2011 period, the decline in employment in South Glengarry was almost equivalent to the growth experienced in the earlier part of the decade for this municipality. Three other municipalities also experienced job losses, while North Glengarry and North Stormont were the only Townships to add employment during this period. The overall decline in employment in SDG during the 2006 to 2011 period is not unique to the County. Throughout Ontario, the recession and economic restructuring resulted in significant job losses in many municipalities, notably for those outside of the major urban centres. While some recovery is anticipated, it is not expected that manufacturing will return to pre-recession levels.

While trends in employment growth and decline have been experienced unevenly among SDG's local municipalities, the general pattern of employment concentrations in the County is relatively stable. Exhibit 1 illustrates local municipal shares of County-wide total employment in 2001 and in 2011.

Exhibit 1: Local Municipal Shares of County-wide Total Employment



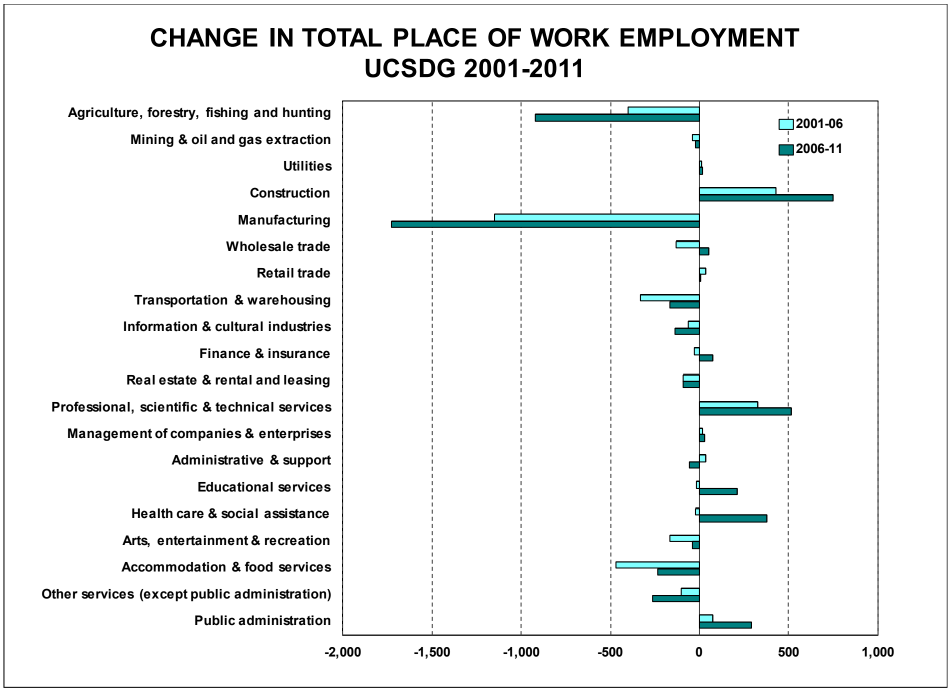
Source: Hemson Consulting Ltd. based on Statistics Canada data.

North and South Glengarry have experienced a notable shift in pattern over this period.

B. SHIFTING ECONOMY

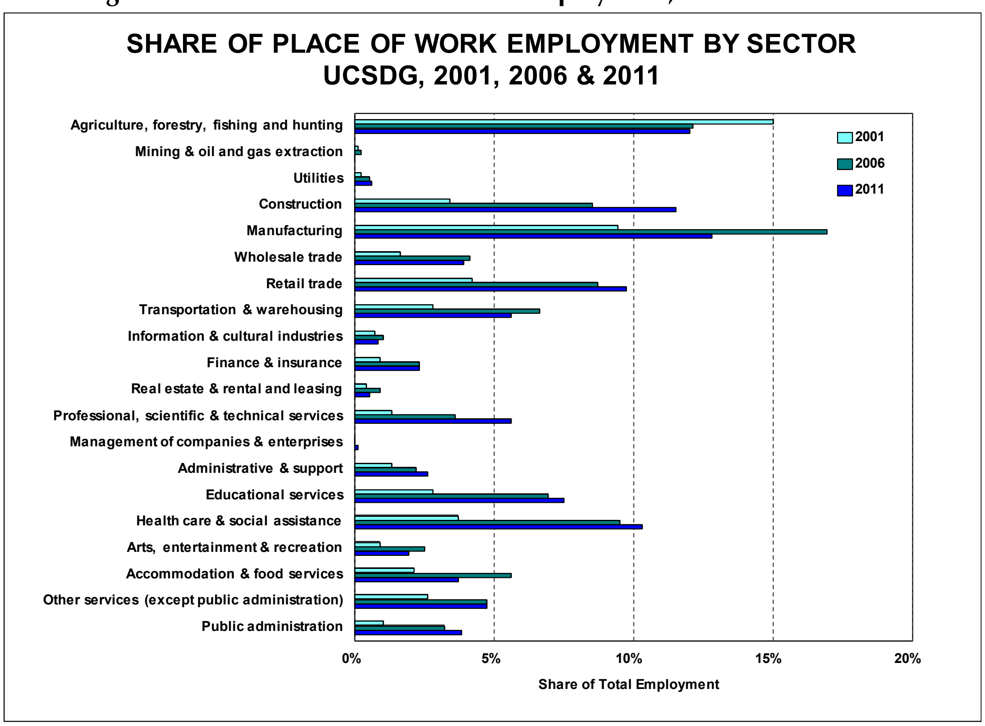
Somewhat less stable has been the sectoral composition of employment in the County. Again, similar to many other municipalities in Ontario, SDG has been experiencing a shift in its local economy, characterized by a decline in traditional manufacturing offset to some extent by growth in services and public administration. This shift began in the 2001 to 2006 period but has become more pronounced since then. In SDG, there has also been an observed decline in the level of primary industry employment, in particular in agriculture and forestry. Exhibit 2 and 3 on the following page illustrate the net change in employment by sector and overall shares of employment by sector over the 2001 to 2011 period.

Exhibit 2: Change in Total Place of Work Employment, 2001-2011



Source: Hemson Consulting Ltd. based on Statistics Canada, 2011 National Household Survey & 2001 Census of Canada.

Exhibit 3: Change in Shares of Total Place of Work Employment, 2001-2011



Source: Hemson Consulting Ltd. based on Statistics Canada, 2011 National Household Survey & 2001 Census of Canada.

C. COMMUTING PATTERNS

While information about Place of Work employment indicates the number of jobs in a given municipality, data on Resident Employed Labour Force (RELF) tells us the number of residents within a municipality that are employed, irrespective of where the job is located. As shown in Table 3, the number of employed residents in SDG peaked at 32,600 in 2006 and then declined marginally between 2006 and 2011.

Table 3

Total Resident Employed Labour Force
Stormont, Dundas and Glengarry, 2001 - 2011

Year	RELF	Growth	Compound Annual Growth Rate
1991	26,200	—	—
1996	26,200	0	0.00%
2001	26,800	600	0.46%
2006	32,600	5,800	4.33%
2011	32,500	(100)	-0.06%

Source: Statistics Canada

Figures are rounded.

Again, the pattern of growth and decline varied at the local level, with a net decline of 100 employed residents including differing levels of change among SDG municipalities.

Table 4

Resident Employed Labour Force by Local Municipality
Stormont, Dundas and Glengaryy, 2001 - 2011

Municipality	Resident Employed Labour Force			Net Change		Compound Annual Growth Rate	
	2001	2006	2011	2001-06	2006-11	2001-06	2006-11
South Glengarry	4,380	6,585	6,570	2,205	(15)	8.5%	0.0%
North Glengarry	5,715	5,220	4,575	(495)	(645)	-1.8%	-2.6%
South Stormont	3,565	6,205	6,320	2,640	115	11.7%	0.4%
North Stormont	2,660	3,625	3,755	965	130	6.4%	0.7%
South Dundas	4,990	5,055	5,170	65	115	0.3%	0.5%
North Dundas	5,510	5,910	6,065	400	155	1.4%	0.5%
SDG	**26,800**	**32,600**	**32,500**	**5,800**	**(100)**	**4.0%**	**-0.1%**

Source: Statistics Canada.

Figures are rounded and may not add.

Overall, SDG is a net-exporter of labour, with many of its employed residents commuting out of the County to work, primarily to the Cities of Cornwall and Ottawa. Table 5 below indicates net out-commuting of employed residents by local municipality for SDG, excluding Cornwall.

Table 5

Net Out-Commuting by Local Municipality
SDG, 2006 & 2011

Municipality	2006		2011	
	Net Out-Commuting	Share of Employed Residents	Net Out-Commuting	Share of Employed Residents
South Glengarry	2,815	43%	3,145	48%
North Glengarry	270	5%	420	9%
South Stormont	3,085	50%	3,085	49%
North Stormont	1,570	43%	1,405	37%
South Dundas	735	15%	1,250	24%
North Dundas	1,070	18%	1,650	27%
UCSDG	**9,545**	**29%**	**10,955**	**34%**

Source: Hemson Consulting based on Statistics Canada data.

At almost 50%, the highest levels of out-commuting are from the municipalities of South Glengarry and South Stormont, the Townships in closest proximity to the City of Cornwall. Likewise, North Stormont and North Dundas also exhibit relatively higher levels of out-commuting, reflecting their proximity to the City of Ottawa. Accessibility to the Ottawa job market has contributed to relatively higher levels of residential growth for these municipalities.

III EMPLOYMENT OUTLOOK IS FOR MODERATE DECLINE OVER THE 2036 PLANNING HORIZON

The outlook for employment growth going forward in SDG is tied to a number of economic and demographic factors, including the broader economic outlook for eastern Ontario and the aging of the population. Updated forecasts have been prepared which are anticipating an overall net decline in SDG over a twenty-year planning horizon. This does not mean that no growth or new development will occur but that the net effect over the long term is for less total employment in the County than there currently is today.

A. FORECASTS UPDATED ON BASIS OF MOST RECENT ECONOMIC AND EMPLOYMENT DATA

The last forecasts of SDG employment were prepared for the County in 2012 and were based largely on 2006 Census data with a forecast for 2011. The forecasts have been reviewed and updated taking into consideration the results of the 2011 National Household Survey and other more recently available information affecting the economic and employment outlook for SDG. As shown in Table 6 below, the County's 2011 employment was lower than had been forecast, in large part a result of the recession and decline in manufacturing.

Table 6
Comparison- Forecast 2011 Total Employment and 2011 National Household Survey Results (NHS)
Stormont, Dundas and Glengarry

Municipality	2011 Forecast	2011 NHS Result	Difference
North Dundas	4,650	4,210	-440
South Dundas	4,210	3,660	-550
North Stormont	1,690	1,990	300
South Stormont	2,840	2,640	-200
North Glengarry	3,500	3,960	460
South Glengarry	4,890	3,310	-1,580
SDG	**21,800**	**19,800**	**-2,000**

Source: Hemson Consulting Ltd. & Statistics Canada.
Figures are rounded.

B. TOTAL EMPLOYMENT IS FORECAST TO DECLINE OVER PLANNING HORIZON

The updated County-wide employment forecast from a 2011 to 2041 horizon is shown below. Emphasis is given to the 20 year planning period from 2016 to 2036 for consistency with the updated SDG official plan horizon. It is anticipated that SDG will experience a decline in employment of roughly 2,400 jobs over the forecast horizon to 2041. The County will still experience development, and growth and change in employment however, the net effect of the demographic and economic influences at work in SDG is not expected to offset the impacts of continuing adjustments within the broader economy. Factors such as the aging of the population, out-migration of younger aged adults and the broader economic shift away from traditional industries have important implications for the employment outlook in SDG. The updated forecasts still anticipate somewhat less of decline to the 2031 horizon as was forecast in 2012, owing to an observed increase in migration to the Ottawa area.

Table 7

Forecast Total Place of Work Employment
SDG, 2011 - 2041

Year	POW Employment	Growth	Compound Annual Growth Rate
2011	19,800	—	—
2016	20,400	600	0.6%
2021	19,700	(700)	-0.7%
2026	19,000	(700)	-0.7%
2031	18,400	(600)	-0.6%
2036	18,000	(400)	-0.4%
2041	18,000	-	0.0%
2016 - 2036		**(2,400)**	**-0.6%**

Source: Hemson Consulting Ltd. based on Statistics Canada data.

Figures are rounded.

C. OUTLOOK VARIES BY LOCAL DISTRIBUTION AND LAND BASED CATEGORIES OF EMPLOYMENT

The local forecast distribution to municipalities within SDG is shown below.

Table 8

Forecast Total Place of Work Employment by Local Municipality
SDG, 2011 - 2041

Municipality	Total Place of Work Employment							2016-2036	
	2011	2016	2021	2026	2031	2036	2041	Net Change	Compound Annual Growth Rate
South Glengarry	3,310	**4,840**	4,700	4,570	4,450	**4,430**	4,440	(410)	-0.4%
North Glengarry	3,960	**3,570**	3,490	3,440	3,400	**3,480**	3,490	(90)	-0.1%
South Stormont	2,640	**2,190**	2,060	1,910	1,780	**1,720**	1,720	(470)	-1.2%
North Stormont	1,990	**1,330**	1,280	1,240	1,220	**1,240**	1,250	(90)	-0.3%
South Dundas	3,660	**4,100**	3,970	3,810	3,670	**3,560**	3,550	(540)	-0.7%
North Dundas	4,210	**4,360**	4,230	4,030	3,880	**3,580**	3,580	(780)	-1.0%
SDG	**19,800**	**20,400**	**19,700**	**19,000**	**18,400**	**18,000**	**18,000**	**(2,400)**	**-0.6%**

Source: Hemson Consulting Ltd. based on Statistics Canada data.
Figures are rounded and may not add.

The employment forecasts are divided into three land based categories:

- Employment Land Employment which consists of traditional industrial-type manufacturing, warehousing and transportation;
- Population-related employment which occurs in response to a resident population and includes public administration, commercial / retail and services; and
- Rural-based employment, including resource-based and agricultural employment in more rural areas.

The results of the forecasts of employment by type by local municipality are provided in tables 9, 10 and 11.

Table 9

Forecast Employment Land Employment by Local Municipality
SDG, 2011 - 2041

Municipality	Employment Land Employment							2016-2036	
	2011	2016	2021	2026	2031	2036	2041	Net Change	Compound Annual Growth Rate
South Glengarry	1,180	**1,920**	1,870	1,790	1,690	**1,610**	1,580	(310)	-0.9%
North Glengarry	1,650	**1,230**	1,210	1,190	1,160	**1,130**	1,120	(100)	-0.4%
South Stormont	1,180	**1,200**	1,140	1,040	940	**840**	810	(360)	-1.8%
North Stormont	660	**460**	450	440	430	**410**	410	(50)	-0.6%
South Dundas	1,470	**1,530**	1,470	1,380	1,270	**1,170**	1,140	(360)	-1.3%
North Dundas	1,700	**1,750**	1,700	1,630	1,540	**1,460**	1,440	(290)	-0.9%
SDG	**7,800**	**8,100**	**7,800**	**7,500**	**7,000**	**6,600**	**6,500**	**(1,500)**	**-1.0%**

Source: Hemson Consulting Ltd. based on Statistics Canada data.

Figures are rounded and may not add.

Table 10

Forecast Population Related Employment by Local Municipality
SDG, 2011 - 2041

Municipality	Population Related Employment							2016-2036	
	2011	2016	2021	2026	2031	2036	2041	Net Change	Compound Annual Growth Rate
South Glengarry	1,390	**2,150**	2,100	2,070	2,060	**2,130**	2,170	(20)	0.0%
North Glengarry	1,630	**1,500**	1,460	1,450	1,450	**1,570**	1,590	70	0.2%
South Stormont	1,030	**590**	530	490	480	**520**	550	(70)	-0.6%
North Stormont	730	**360**	330	310	310	**350**	370	(10)	-0.1%
South Dundas	1,450	**1,870**	1,830	1,780	1,770	**1,760**	1,790	(110)	-0.3%
North Dundas	1,600	**1,610**	1,560	1,460	1,420	**1,210**	1,240	(400)	-1.4%
SDG	**7,800**	**8,100**	**7,800**	**7,600**	**7,500**	**7,500**	**7,700**	**(540)**	**-0.4%**

Source: Hemson Consulting Ltd. based on Statistics Canada data.

Figures are rounded and may not add.

Table 11

Forecast Rural Based Employment by Local Municipality
SDG, 2011 - 2041

Municipality	Rural Based Employment							2016-2036	
	2011	2016	2021	2026	2031	2036	2041	Net Change	Compound Annual Growth Rate
South Glengarry	740	**760**	740	720	700	**690**	690	(70)	-0.5%
North Glengarry	680	**840**	820	800	780	**780**	780	(60)	-0.4%
South Stormont	430	**400**	390	380	370	**360**	360	(40)	-0.5%
North Stormont	610	**510**	500	490	480	**470**	470	(40)	-0.4%
South Dundas	730	**690**	670	650	640	**630**	630	(60)	-0.5%
North Dundas	910	**990**	960	940	920	**900**	910	(90)	-0.5%
SDG	**4,100**	**4,200**	**4,100**	**4,000**	**3,900**	**3,800**	**3,800**	**(400)**	**-0.5%**

Source: Hemson Consulting Ltd. based on Statistics Canada data.

Figures are rounded and may not add.

Most of the forecast decline in employment is expected to occur in the employment land category, which are the uses that typically occupy industrial-type buildings on designated employment lands within the meaning of the PPS. These lands are the focus of the land supply inventory and capacity analysis examined in the following section.

IV THE COUNTY HAS SUFFICIENT SUPPLY OF URBAN DESIGNATED EMPLOYMENT LANDS

A review was undertaken of the designated employment land supply in SDG utilizing the County's GIS data and a desktop site review. This review identified the land budget for employment, documented changes to the supply since the last inventory was prepared in 2012, and identifies any surplus or potential shortages in the supply available to accommodate employment growth. Table 12 indicates the 2012 and 2015 urban designated employment land supply by Township and settlement area.

A. UPDATED EMPLOYMENT LAND BUDGET

Table 12

Vacant Urban Employment Land Supply Inventory, 2012 & 2015

Stormont, Dundas and Glengarry

Municipality	Settlement Area	Urban Employment Lands (ha)		
		2012	2014	Difference
North Dundas	Chesterville	6.9	16.2	9.3
	Winchester	23.4	24.5	1.1
	Total	**30.2**	**40.7**	**10.5**
South Dundas	Iroquois	54.8	44.8	(9.9)
	Morrisburg	239.5	184.6	(54.9)
	Total	**294.2**	**229.5**	**(64.8)**
North Stormont	Crysler	-	-	-
	Finch	-	0.4	0.4
	Moose Creek	-	-	-
	Total	**-**	**0.4**	**0.4**
South Stormont	Eamers Rosedale	-	-	-
	Ingleside	94.7	43.7	(51.0)
	Newington	-	-	-
	St.Andrews	-	-	-
	Long Sault	87.5	80.3	(7.2)
	Total	**182.2**	**124.0**	**(58.2)**
North Glengarry	Maxville	2.2	2.1	(0.1)
	Alexandria	25.3	36.0	10.7
	Total	**27.6**	**38.1**	**10.6**
South Glengarry	Glen Walter	86.7	16.6	(70.2)
	Green Valley	-	-	-
	Lancaster	2.6	3.8	1.2
	Total	**89.3**	**20.4**	**(68.9)**
SDG	***Grand Total***	***623.5***	***453.1***	***(170.4)***

The analysis indicates that the County has just over 450 gross ha of urban designated employment lands, 170 ha less than was identified in 2012. The overall change to supply is a result of recent absorption and industrial investment as well as changes to the supply that occurred from the implementation of a number of boundary changes to settlement areas in 2013.

The County also has nearly 500 ha of rural designated employment lands, which could accommodate more limited and rural based employment uses.

Table 13
Vacant Rural Employment Land Supply Inventory, 2012 & 2015
United Counties of Stormont, Dundas and Glengarry

Municipality	Rural Area Employment Lands (ha)		
	2012	2014	Difference
North Dundas	81.7	137.1	55.4
South Dundas	119.2	123.5	4.2
North Stormont	61.6	79.9	18.3
South Stormont	-	-	-
North Glengarry	-	-	-
South Glengarry	56.3	155.4	99.1
SDG	**318.9**	**495.9**	**177.0**

Again, there is variation at the local level. Over half of the County's designated employment land supply is located in South Dundas, where 90 ha was recently added in the community of Morrisburg. Another nearly 30% is located within the Township of South Stormont. The balance of the County's urban employment lands is relatively evenly spread throughout the County with the exception of North Stormont which has a very limited supply.

Table 14 Vacant Urban Employment Land Supply Stormont, Dundas and Glengarry, 2015		
Municipality	**ha**	**Share of County-wide**
North Dundas	40.7	9%
South Dundas	229.5	51%
North Stormont	0.4	0%
South Stormont	124.0	27%
North Glengarry	38.1	8%
South Glengarry	20.4	4%
SDG	**453.1**	**100%**

B. URBAN EMPLOYMENT LAND CAPACITY ANALYSIS

An analysis was undertaken of the capacity of the designated employment lands in SDG to accommodate job growth. This is considered within the context of the growth outlook for employment in the County and policy direction from the PPS. Within the context of the PPS, the focus is on traditional industrial type employment growth on urban designated employment lands. Population-related employment will occur throughout various land use designations in response to the resident population. As well, more limited rural-based employment growth may continue to occur throughout the rural and agricultural areas of the County, mostly on the rural designated employment supply.

An estimate is made of the capacity for job growth by applying a set of test densities to the net vacant supply in each of SDG's townships. The gross vacant supply was determined through County GIS. An industry standard 80% net to gross adjustment was made to account for infrastructure, roads and storm water drainage. A further 10% adjustment was made to the net supply; 5% for long-term vacancy and 5% for underutilization, again industry standards in evaluating employment lands.

A density range of 10,20 and 30 jobs per net ha was applied to the adjusted net vacant supply, consistent with the lower density development norm in SDG and a generally observed decline in employment densities over time in traditional employment land settings. The results are shown in Table 15 below.

Table 15 Vacant Urban Employment Land Supply - Estimated Employment Growth Capacity Stormont, Dundas and Glengarry, 2015						
Municipality	Designated Employment Land			Employment Potential based on Density Range (Jobs / net ha)		
	Gross ha	Net ha*	Adjusted*	10	20	30
North Dundas	40.7	32.5	29.3	293	586	878
South Dundas	229.5	183.6	165.2	1,652	3,304	4,956
North Stormont	0.4	0.4	0.3	3	6	10
South Stormont	124.0	99.2	89.3	893	1,786	2,679
North Glengarry	38.1	30.5	27.5	275	549	824
South Glengarry	20.4	16.3	14.7	147	293	440
UCSDG	**453.1**	**362.5**	**326.3**	**3,263**	**6,525**	**9,788**

Source: Hemson Consulting Ltd. based on information provided by SDG.
*Gross to net adjustment 80%
**A standard 10% adjustment for long-term vacancy (5%) and underutlilization (5%) is applied to the net supply.

Table 15 indicates that the County could accommodate more than 3,200 additional jobs if the entire supply is built-out at the lowest density contemplated. At the higher end of the density range, there is an estimated capacity for nearly 9,800 additional jobs on the existing designated supply. Again, the distribution among townships within SDG is uneven. This analysis does not consider existing or planned servicing capacity, which ultimately affects the employment capacity, timing and likelihood of development.

The analysis illustrates that, overall, there is sufficient supply in terms of the amount of designated land to meet the employment land forecast demand, especially given that the County is expected to experience a net decline in total employment over the forecast horizon. Among SDG municipalities, the Township of North Stormont has minimal supply; however, it also has the smallest employment base. Notwithstanding that the current long-range outlook is for declining employment, employment and economic activity will continue to occur to varying degrees at the local level. It is prudent that the County maintain a viable supply of employment lands to promote investment-readiness and provide a range of opportunities for employers to locate in SDG. Maintaining a market-ready supply of employment lands will help to ensure the County can meet the needs of prospective investors and may support an improved economic outlook over the long term in a manner consistent with the PPS.

V CONCLUSIONS AND RECOMMENDATIONS

The County has experienced a slowing employment growth trend since 2001, including a decline since 2006 amidst recession and a broader economic shift away from traditional industries and towards administrative and services sectors. The County has strong economic ties to the Cities of Ottawa and Cornwall, which influence the local economy and are where many SDG residents commute regularly to work.

The overall outlook is for a moderate decline in total employment in SDG over a 2016 to 2036 planning period. There will still be growth and development at the local level however, the net effect of the demographic and economic factors at play in SDG is likely to result in a decline in employment over time.

The County has roughly 450 ha of urban designated employment lands and nearly 500 ha of rural designated employment lands, where more limited employment growth could occur. An analysis of the urban designated supply suggests the County could accommodate more than 3,000 additional jobs on the current inventory. While the amount by local municipality and the ultimate development readiness and uptake of lands varies, overall there is sufficient supply to meet anticipated demand over the planning horizon.

At this time, there is no need to designate additional lands for employment purposes. Notwithstanding a forecast decline in employment over the planning horizon, the County should endeavor to maintain its supply of employment lands. Maintaining a supply of market ready lands suitable to meet a range of employment uses will work to ensure that the County is planning for growth and change in a manner consistent with the Provincial Policy Statement and supportive of an improved economic and employment growth outlook for SDG.

Regular review and update to the County's employment forecasts and employment land supply inventory should be undertaken to ensure the County is planning for growth and change on the basis of the most accurate and current information about local demographic and economic conditions.

Appendix A

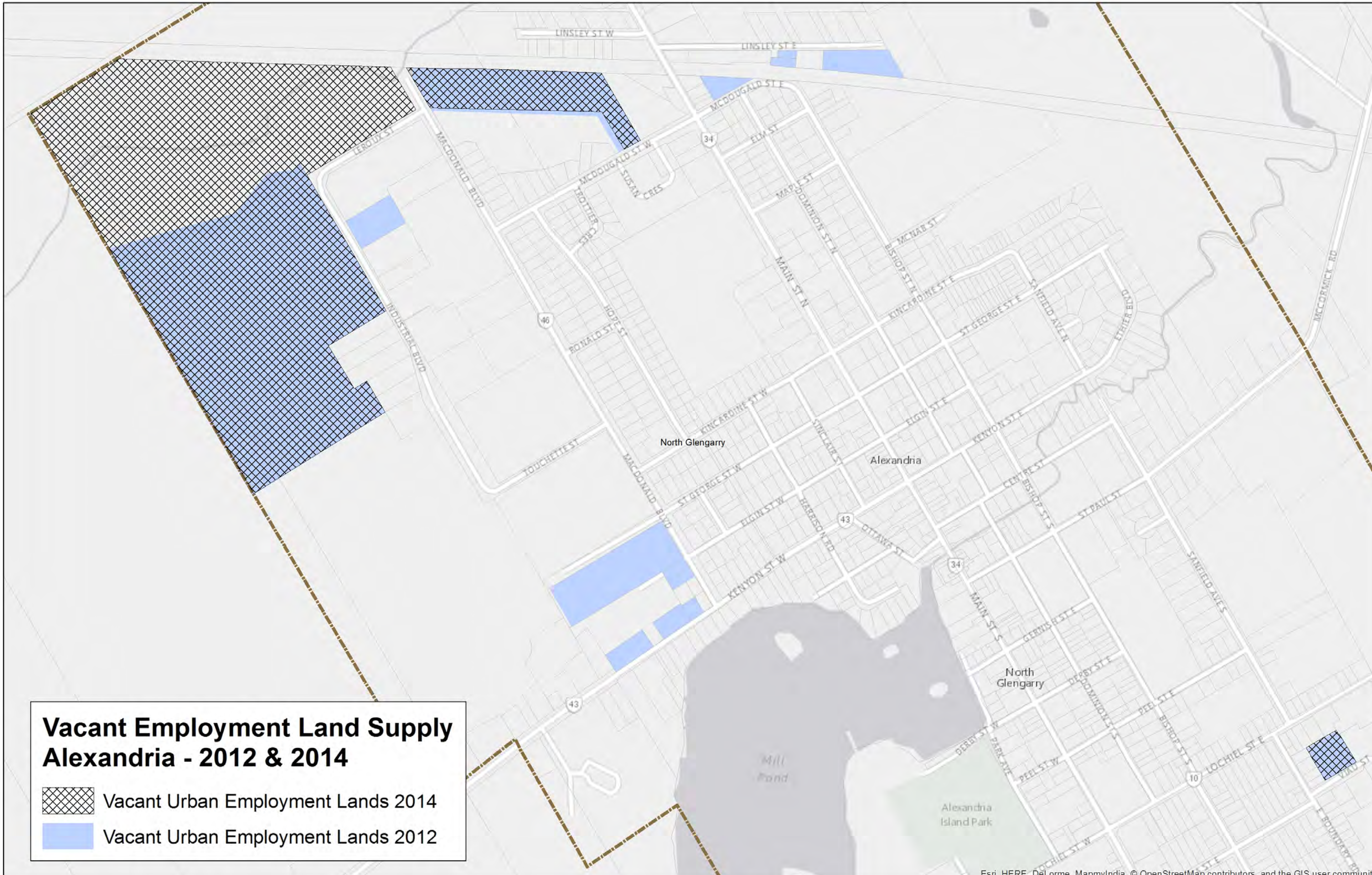
SDG Employment Land Inventory

VACANT EMPLOYMENT LAND SUPPLY

United Counties of Stormont, Dundas and Glengarry
2012 & 2014

Vacant Urban Employment Land Supply Inventory, 2012 & 2014 United Counties of Stormont, Dundas and Glengarry				
Municipality	**Settlement Area**	**Urban Employment Lands (ha)**		
		2012	**2014**	**Difference**
North Dundas	Chesterville	6.85	16.20	9.35
	Winchester	23.36	24.47	1.11
	Total	**30.21**	**40.67**	**10.46**
South Dundas	Iroquois	54.76	44.85	(9.92)
	Morrisburg	239.48	184.62	(54.87)
	Total	**294.25**	**229.46**	**(64.79)**
North Stormont	Crysler	-	0.00	-
	Finch	-	0.45	0.45
	Moose Creek	-	0.00	-
	Total	**-**	**0.45**	**0.45**
South Stormont	Eamers Rosedale	-	0.00	-
	Ingleside	94.74	43.74	(51.00)
	Newington	-	0.00	-
	St.Andrews	-	0.00	-
	Long Sault	87.46	80.30	(7.16)
	Total	**182.21**	**124.04**	**(58.16)**
North Glengarry	Maxville	2.23	2.13	(0.10)
	Alexandria	25.33	36.01	10.68
	Total	**27.56**	**38.14**	**10.58**
South Glengarry	Glen Walter	86.73	16.57	(70.15)
	Green Valley	-	0.00	-
	Lancaster	2.57	3.80	1.24
	Total	**89.29**	**20.38**	**(68.92)**
UCSDG	***Grand Total***	***623.52***	***453.13***	***(170.39)***

Vacant Urban Employment Land Supply Inventory, 2012 & 2014 United Counties of Stormont, Dundas and Glengarry			
Municipality	Rural Area Employment Lands (ha)		
	2012	2014	Difference
North Dundas	81.71	137.12	55.41
South Dundas	119.22	123.46	4.25
North Stormont	61.64	79.91	18.27
South Stormont	-	-	-
North Glengarry	0	-	-
South Glengarry	56.30	155.38	99.09
UCSDG	**318.87**	**495.88**	**177.01**


Vacant Employment Land Supply
Alexandria - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
North Glengarry
Alexandria
North Glengarry
Mill Pond
Alexandria Island Park
LINSLEY ST W
LINSLEY ST E
MCDOUGALD ST E
MCDOUGALD ST W
LEROUX ST
MACDONALD BLVD
INDUSTRIAL BLVD
SUSAN CRES
TROTTIER CRES
ELM ST
MAPLE ST
MCNAB ST
MAIN ST N
DOMINION ST N
BISHOP ST N
KINCARDINE ST E
KINCARDINE ST W
ST GEORGE ST E
ST GEORGE ST W
SANFIELD AVE N
ETHIER BLVD
MCCORMICK RD
RONALD ST
HOPE ST
TOUCHETTE ST
SINCLAIR ST
ELGIN ST E
ELGIN ST W
KENYON ST E
KENYON ST W
CENTRE ST
BISHOP ST S
ST PAUL ST
HARRISON RD
OTTAWA ST
MAIN ST S
GERNISH ST E
DERBY ST E
DERBY ST W
DOMINION ST S
PEEL ST E
PEEL ST W
PARK AVE
LOCHIEL ST E
LOCHIEL ST W
SANFIELD AVE S
E BOUNDARY RD
34
46
43
10
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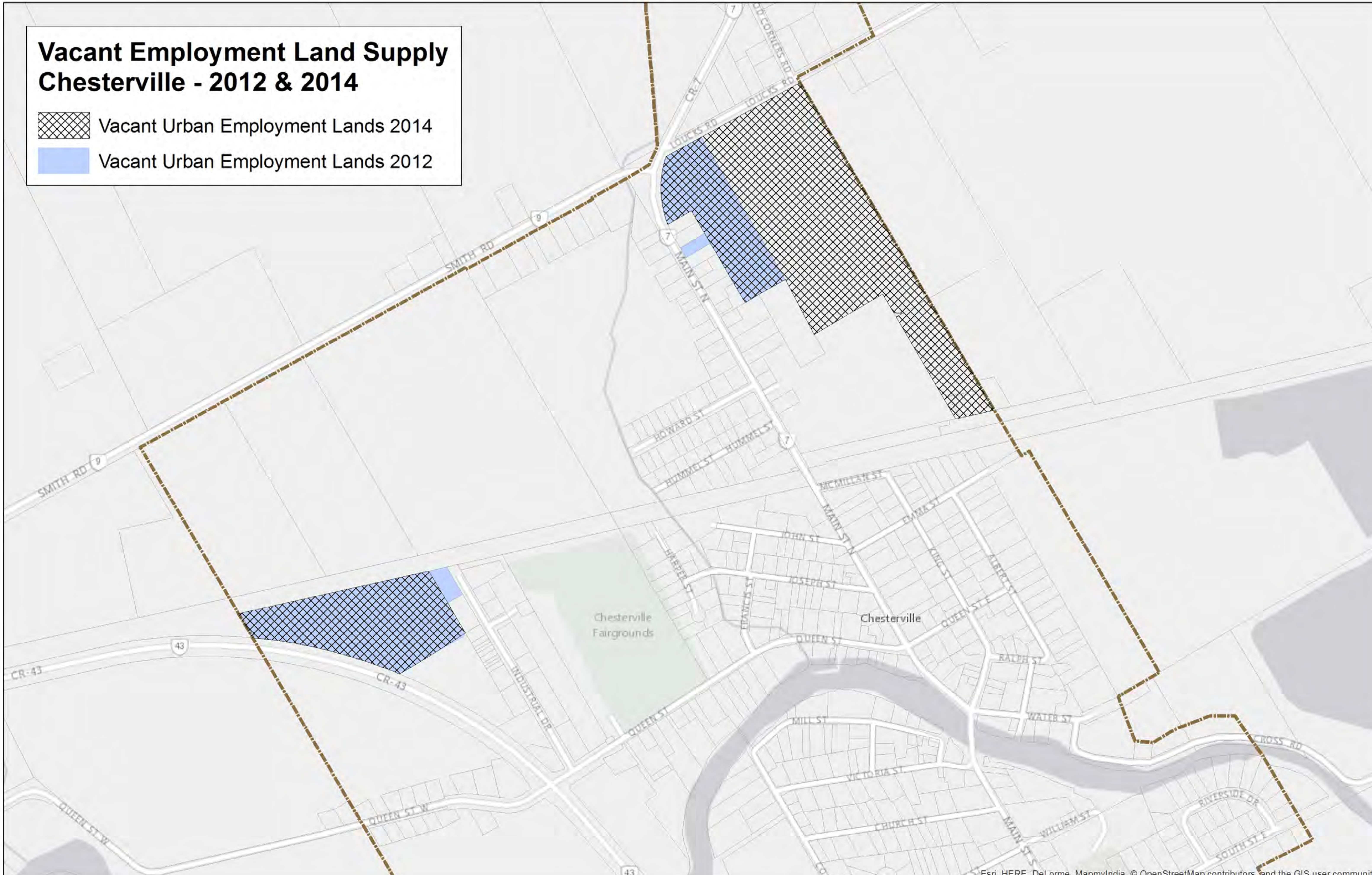
Vacant Employment Land Supply
Chesterville - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
LOUCKS RD
CR-7
SMITH RD
MAIN ST N
HOWARD ST
HUMMEL ST
MCMILLAN ST
EMMA ST
JOHN ST
HARPER ST
JOSEPH ST
KING ST
ALBERT ST
FRANCIS ST
QUEEN ST E
Chesterville
Chesterville Fairgrounds
QUEEN ST
RALPH ST
WATER ST
CR-43
INDUSTRIAL DR
MILL ST
VICTORIA ST
CHURCH ST
WILLIAM ST
RIVERSIDE DR
SOUTH ST E
ROSS RD
QUEEN ST W
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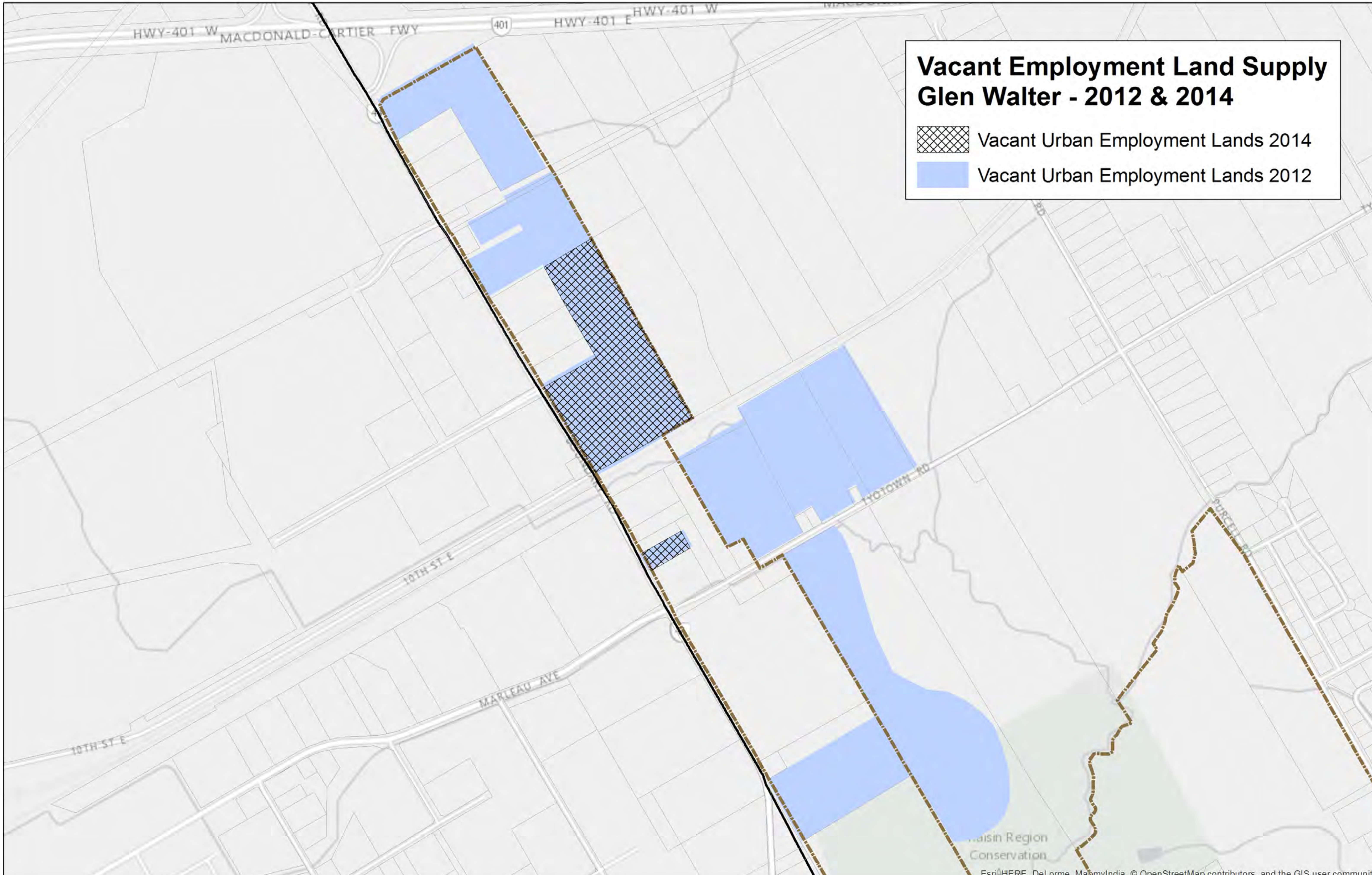

Vacant Employment Land Supply
Glen Walter - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
HWY-401 W
MACDONALD-CARTIER FWY
401
HWY-401 E
HWY-401 W
10TH ST E
10TH ST E
MARLEAU AVE
TYOTOWN RD
Raisin Region Conservation
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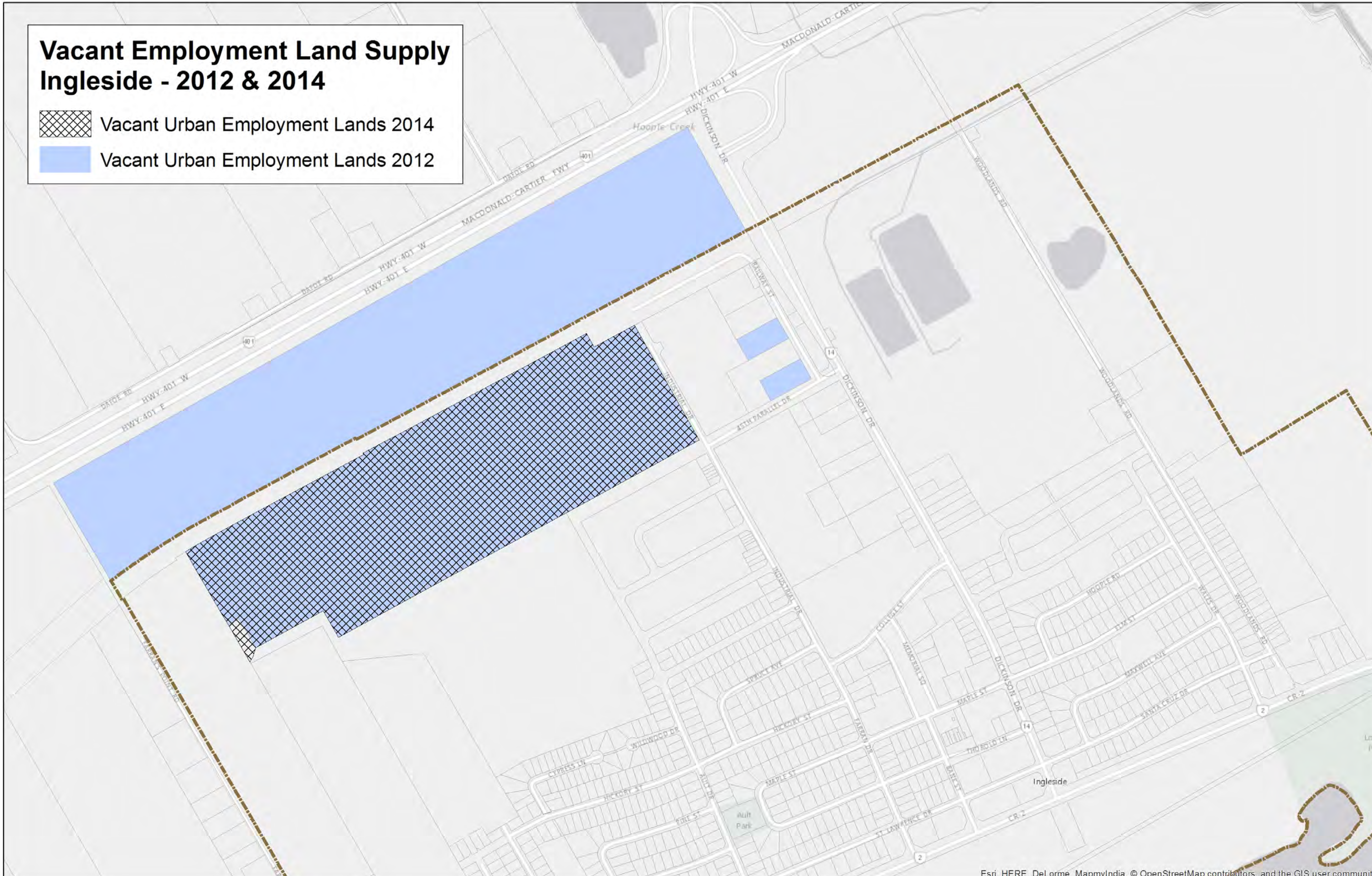
Vacant Employment Land Supply
Ingleside - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
MACDONALD-CARTIER FWY
HWY-401 W
HWY-401 E
DICKINSON DR
WOODLANDS RD
45TH PARALLEL DR
Ingleside
CR-2
ST LAWRENCE DR
MAPLE ST
Ault Park
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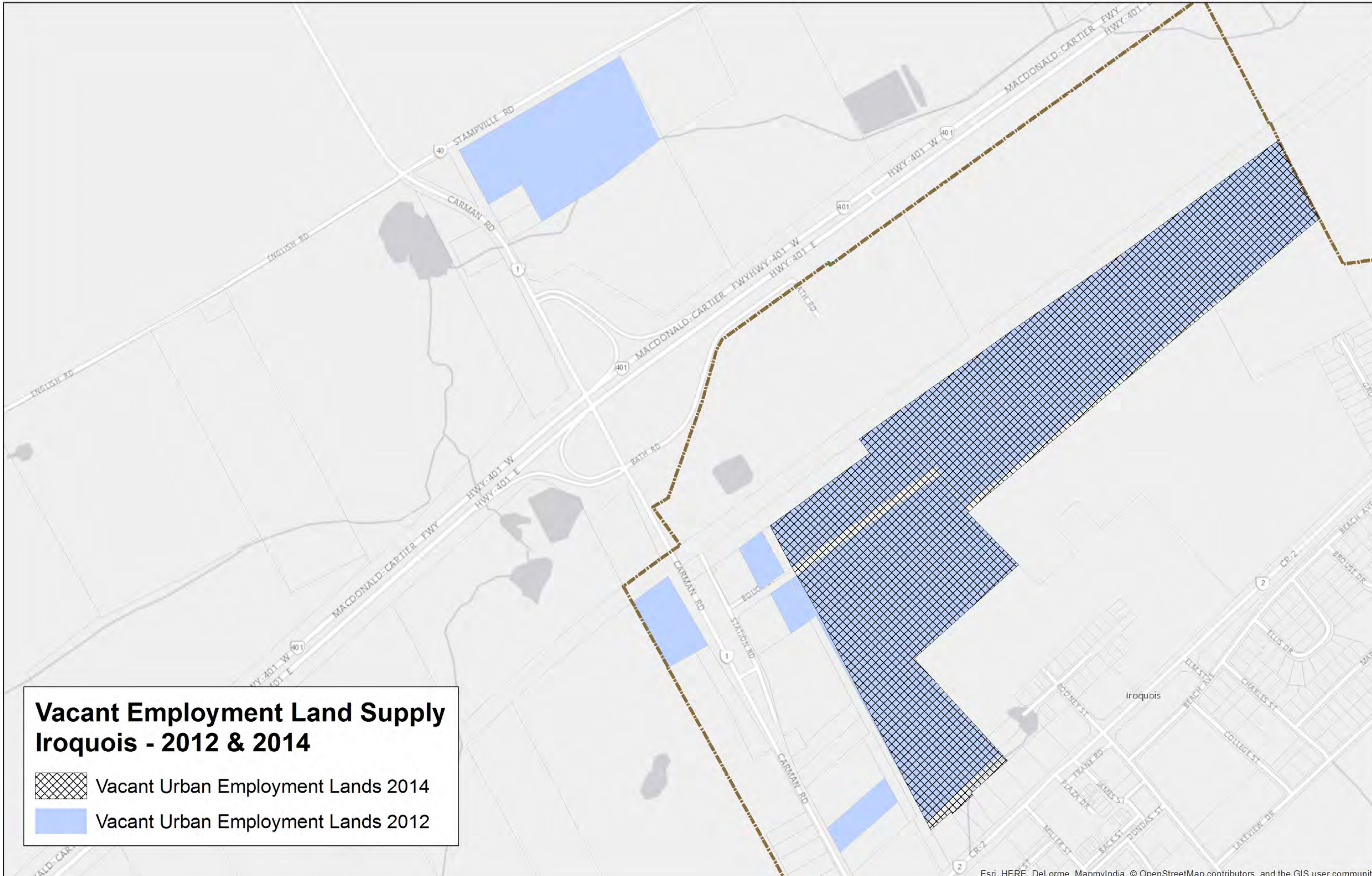
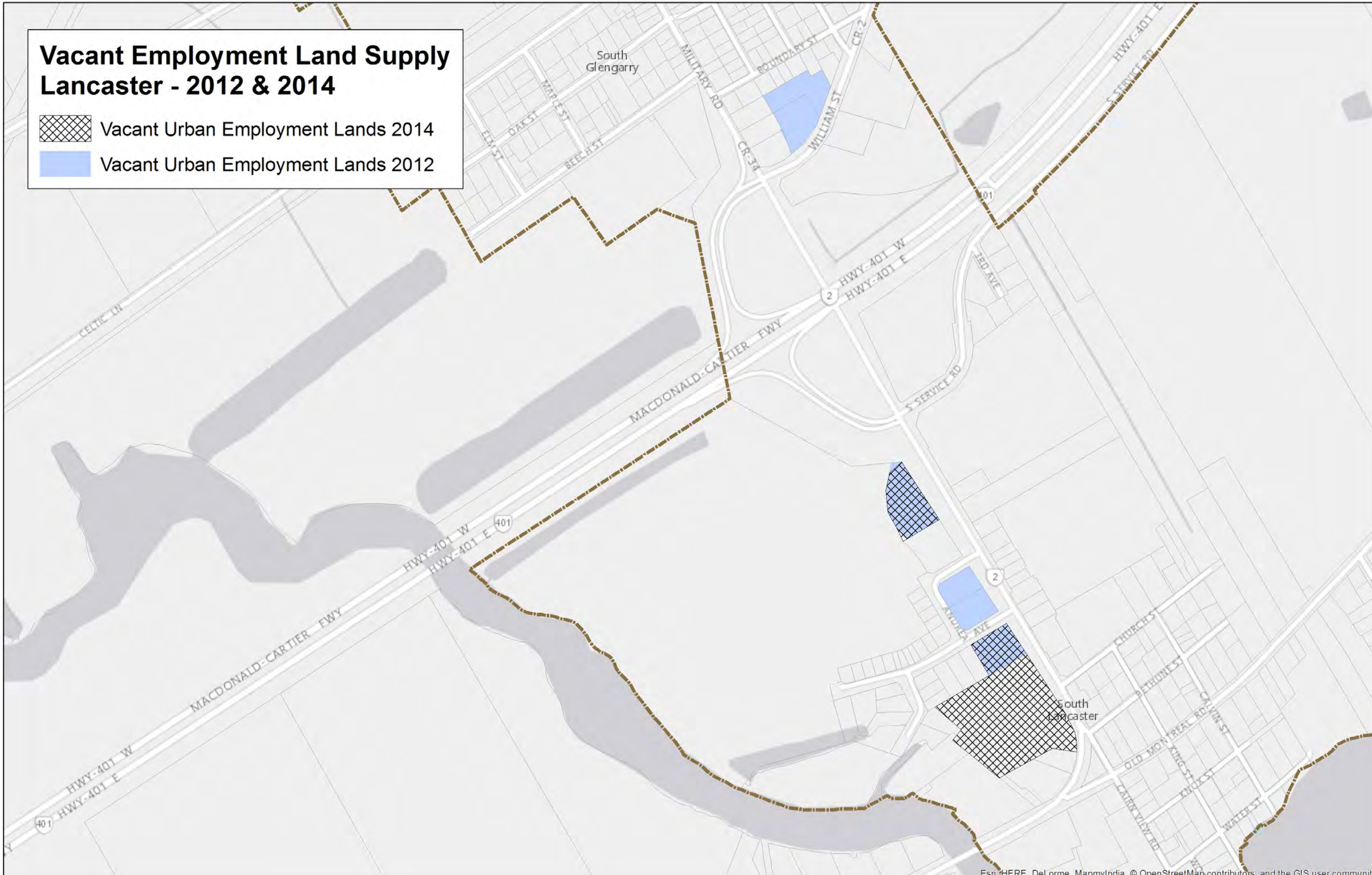


Vacant Employment Land Supply Iroquois - 2012 & 2014


Vacant Employment Land Supply
Lancaster - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
South Glengarry
South Lancaster
MILITARY RD
BOUNDARY ST
CR-2
CR-34
WILLIAM ST
MAPLE ST
OAK ST
ELM ST
BEECH ST
HWY-401 E
HWY-401 W
S SERVICE RD
3RD AVE
MACDONALD-CARTIER FWY
CELTIC LN
CHURCH ST
BETHUNE ST
OLD MONTREAL RD
CALVIN ST
KING ST
KNOX ST
WATER ST
CAIRN VIEW RD
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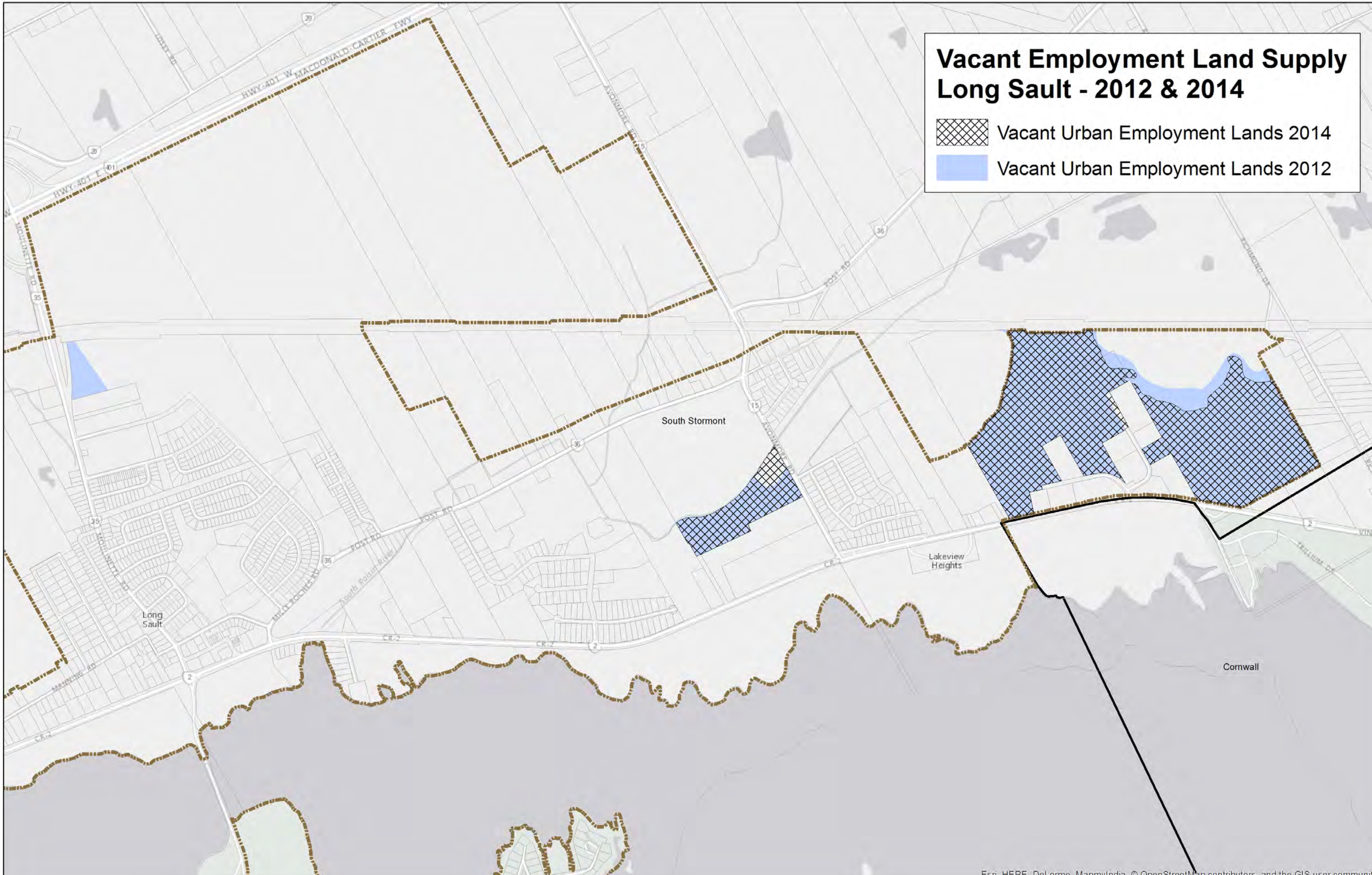

Vacant Employment Land Supply
Long Sault - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
HWY-401 W MACDONALD-CARTIER FWY
HWY-401 E
POST RD
South Stormont
Lakeview Heights
Long Sault
Cornwall
CR-2
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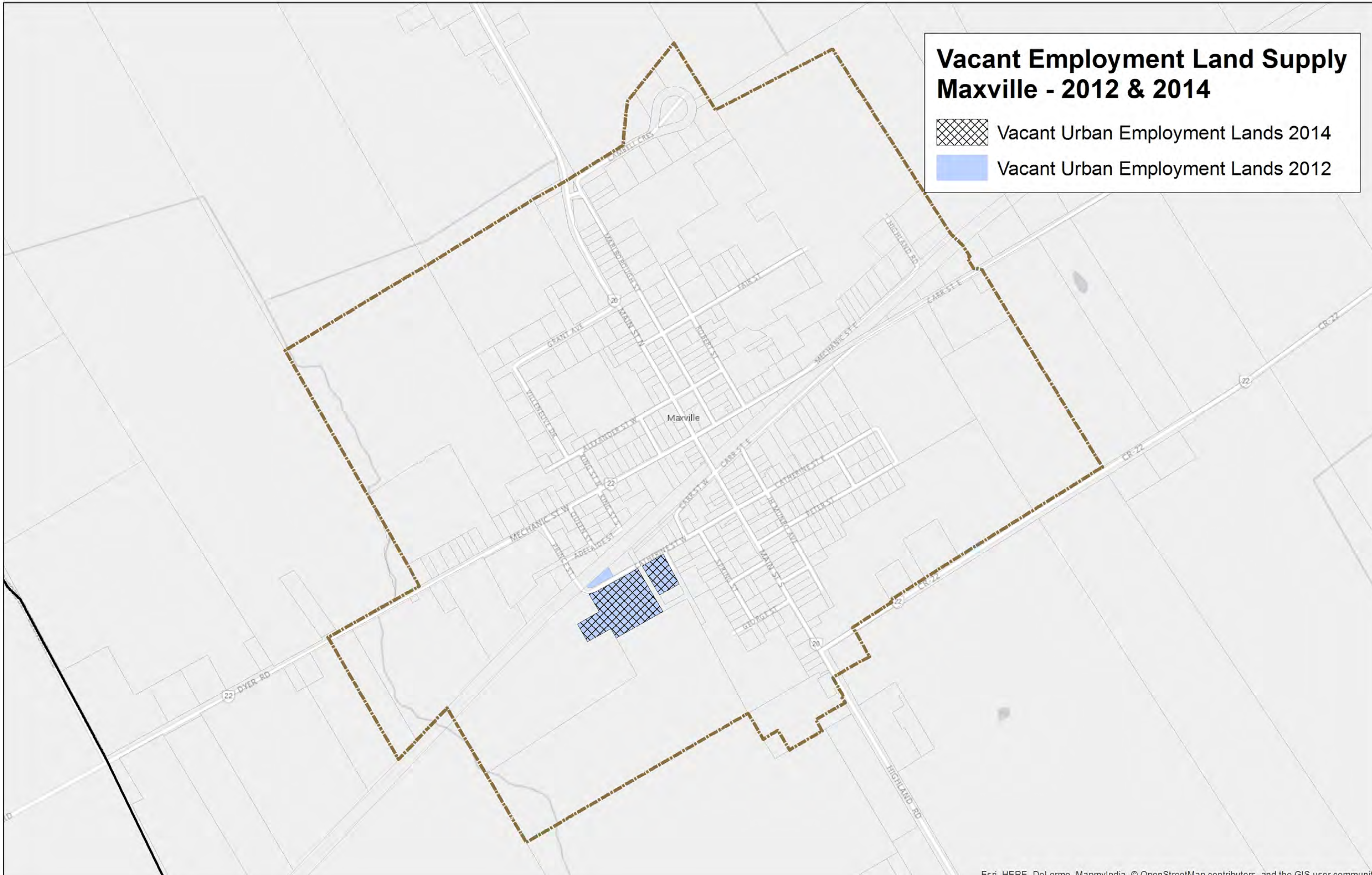
Vacant Employment Land Supply
Maxville - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
Maxville
MECHANIC ST W
MECHANIC ST E
GRANT AVE
CARR ST E
DYER RD
CR-22
HIGHLAND RD
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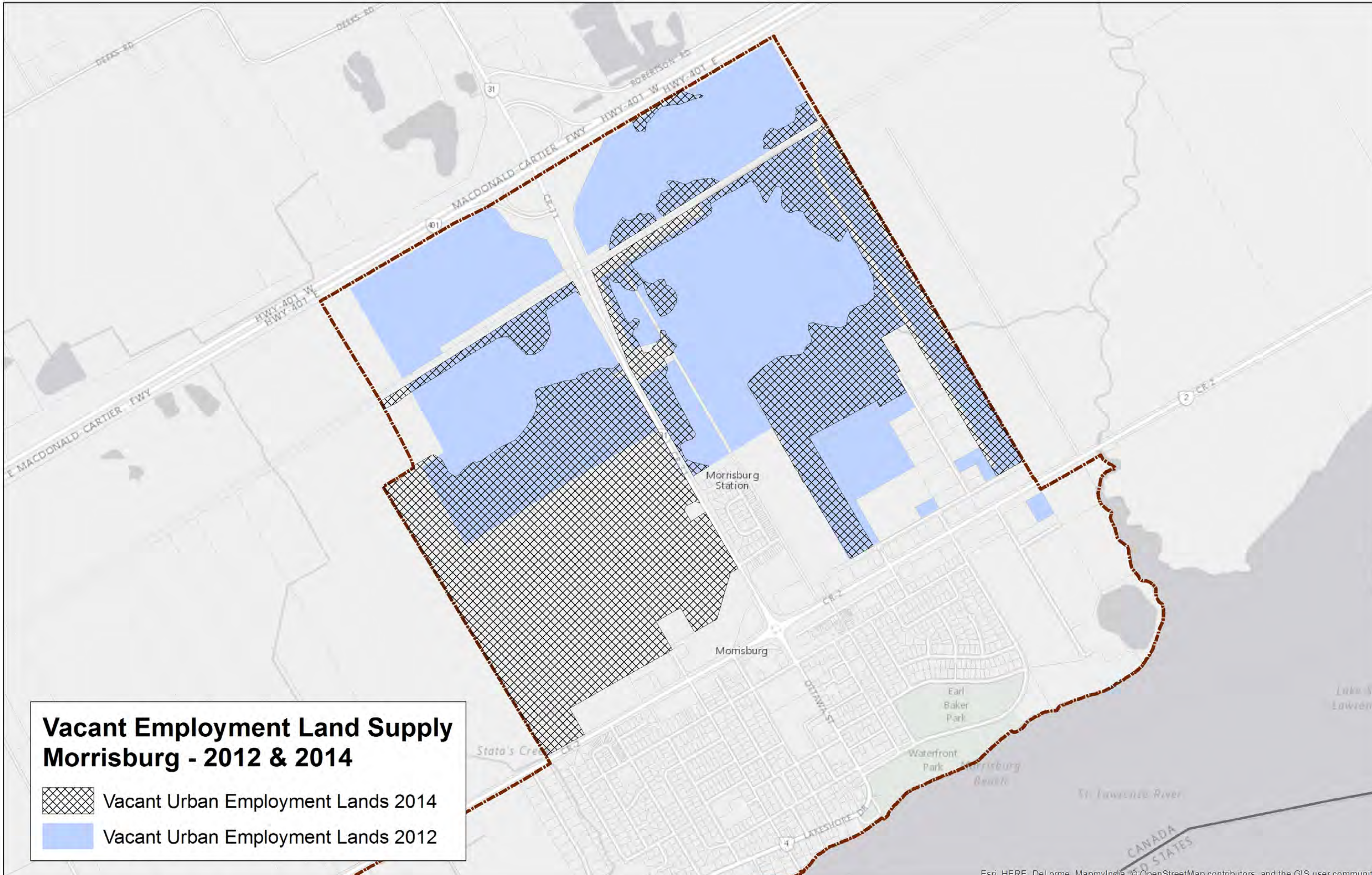
Vacant Employment Land Supply
Morrisburg - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
Morrisburg Station
Morrisburg
Earl Baker Park
Waterfront Park
Morrisburg Beach
St. Lawrence River
MACDONALD-CARTIER FWY
HWY 401 W
HWY 401 E
ROBERTSON RD
DEEKS RD
CR 2
OTTAWA ST
LAKESHORE DR
CANADA
UNITED STATES
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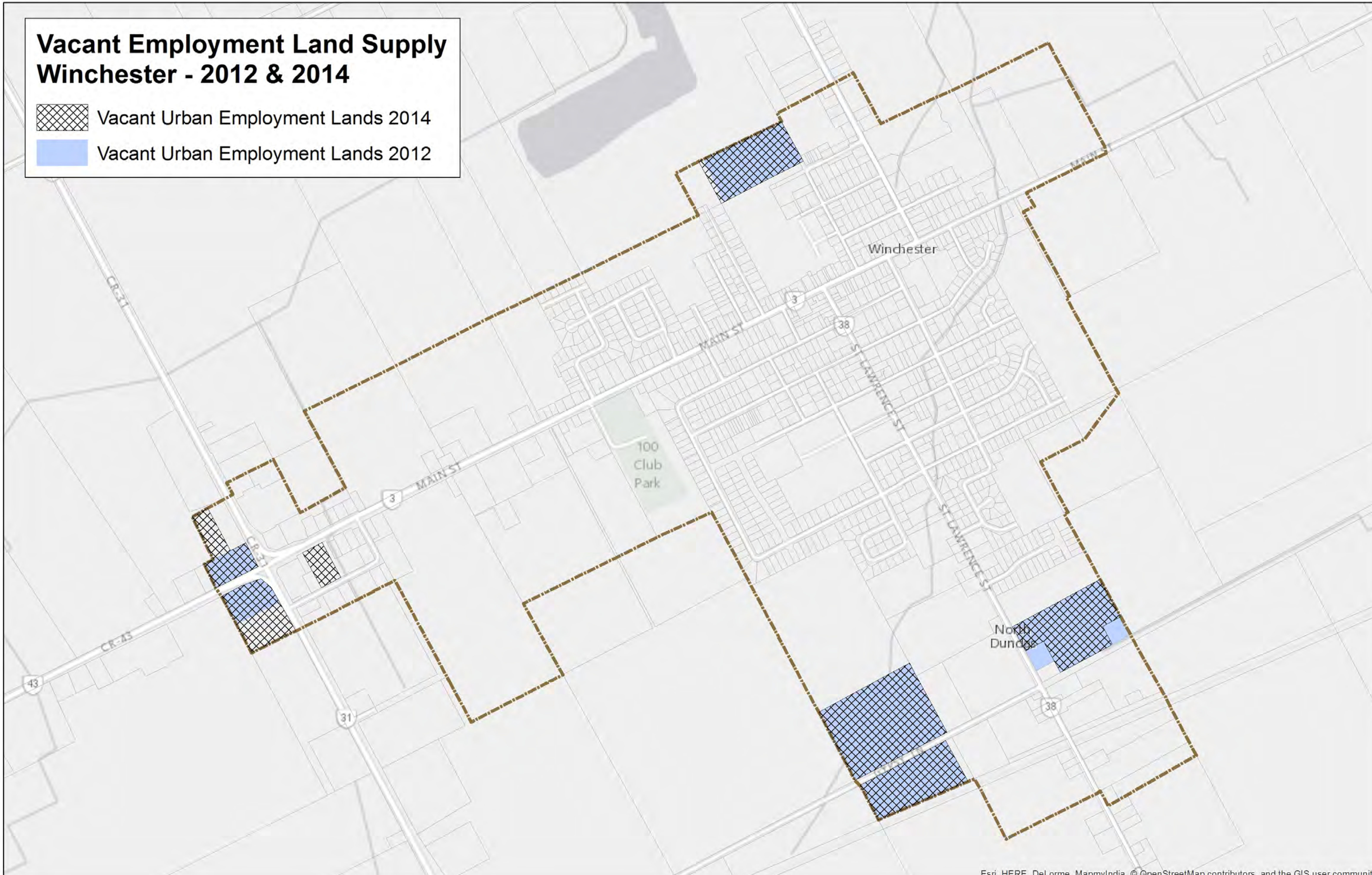
Vacant Employment Land Supply
Winchester - 2012 & 2014
Vacant Urban Employment Lands 2014
Vacant Urban Employment Lands 2012
Winchester
MAIN ST
MAIN ST
MAIN ST
ST LAWRENCE ST
ST LAWRENCE ST
100 Club Park
North Dundas
CR-31
CR-31
CR-43
3
3
38
38
31
43
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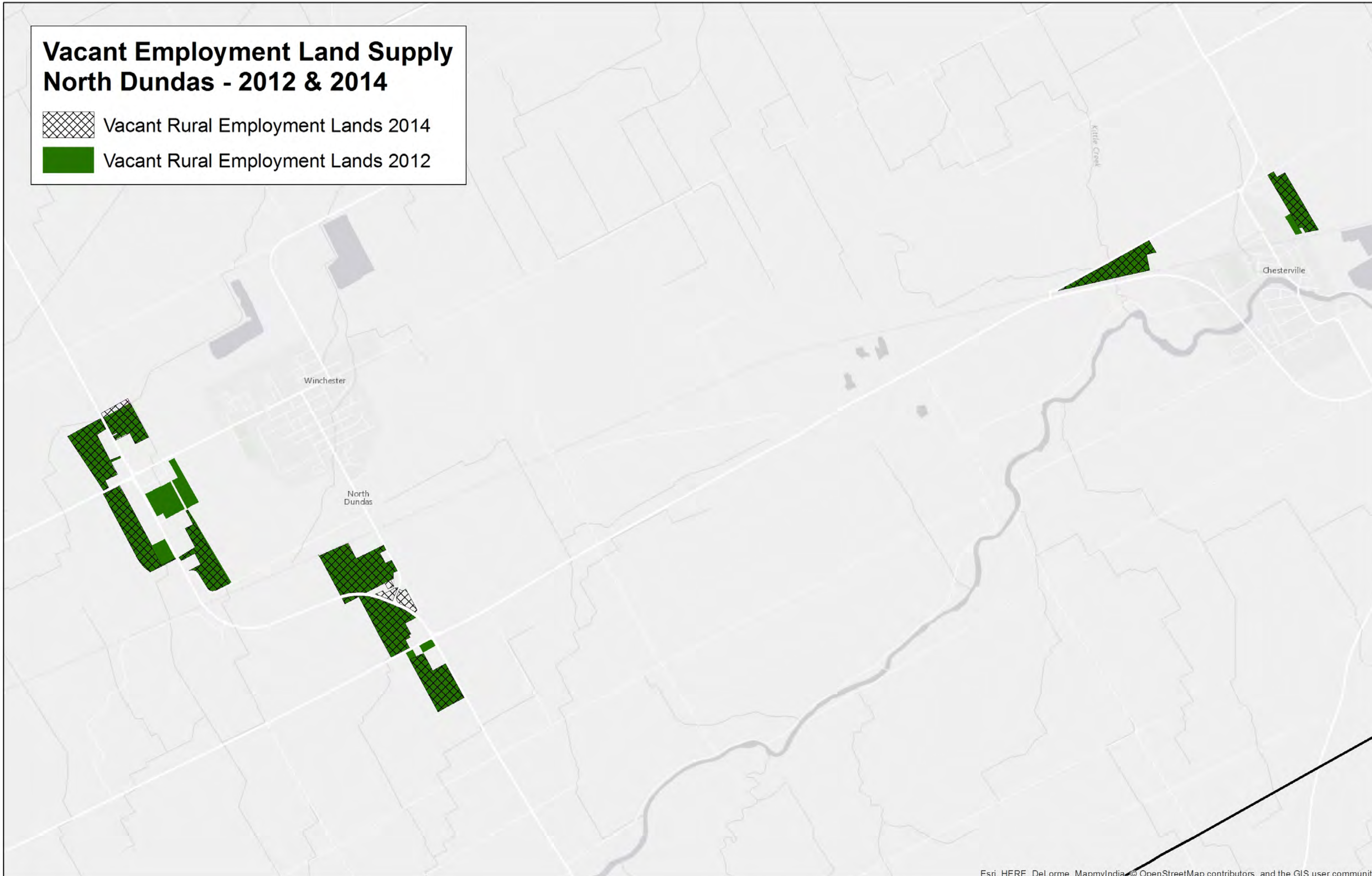
Vacant Employment Land Supply
North Dundas - 2012 & 2014
Vacant Rural Employment Lands 2014
Vacant Rural Employment Lands 2012
Winchester
North Dundas
Chesterville
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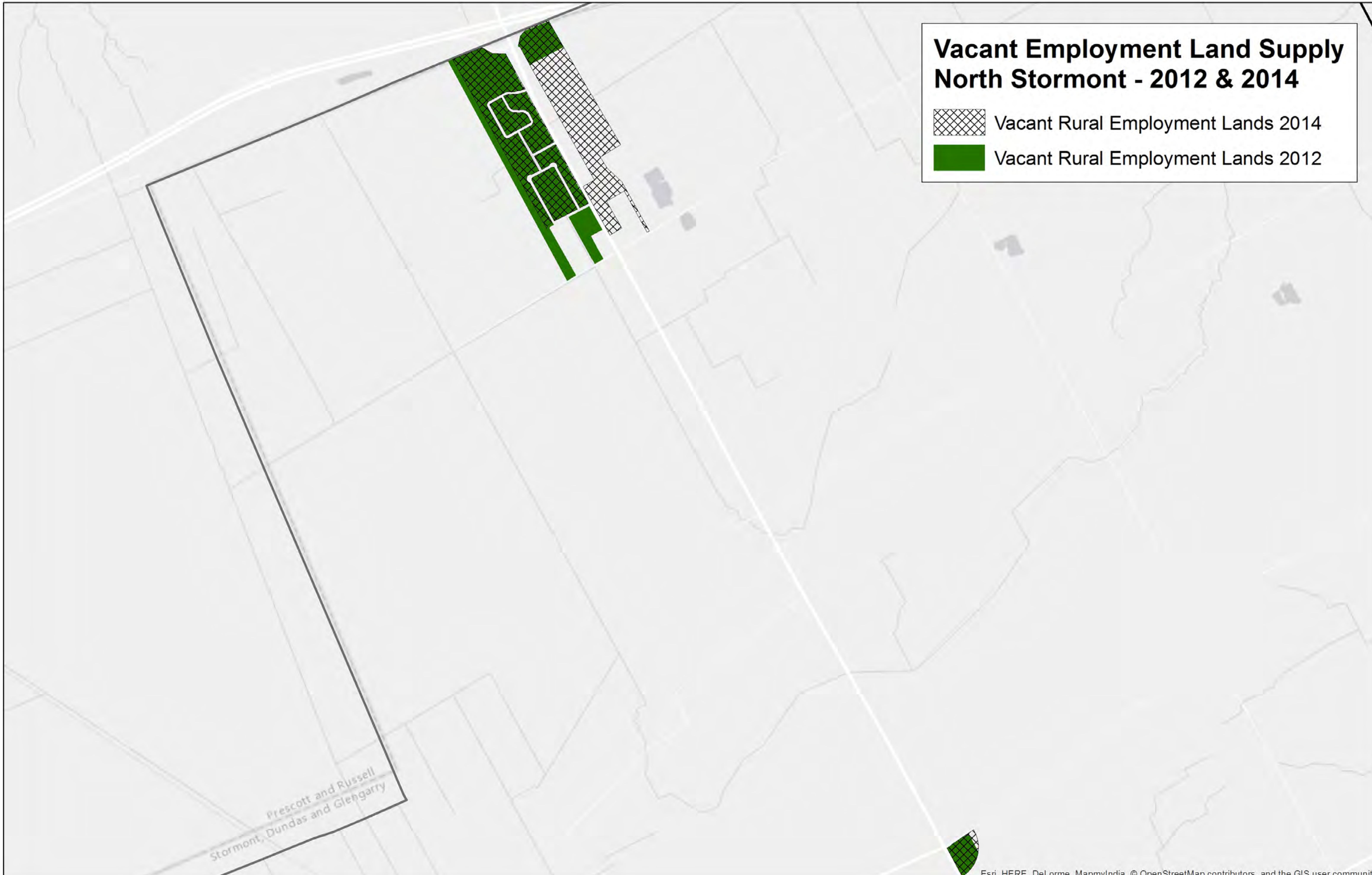
Vacant Employment Land Supply
North Stormont - 2012 & 2014
Vacant Rural Employment Lands 2014
Vacant Rural Employment Lands 2012
Prescott and Russell
Stormont, Dundas and Glengarry
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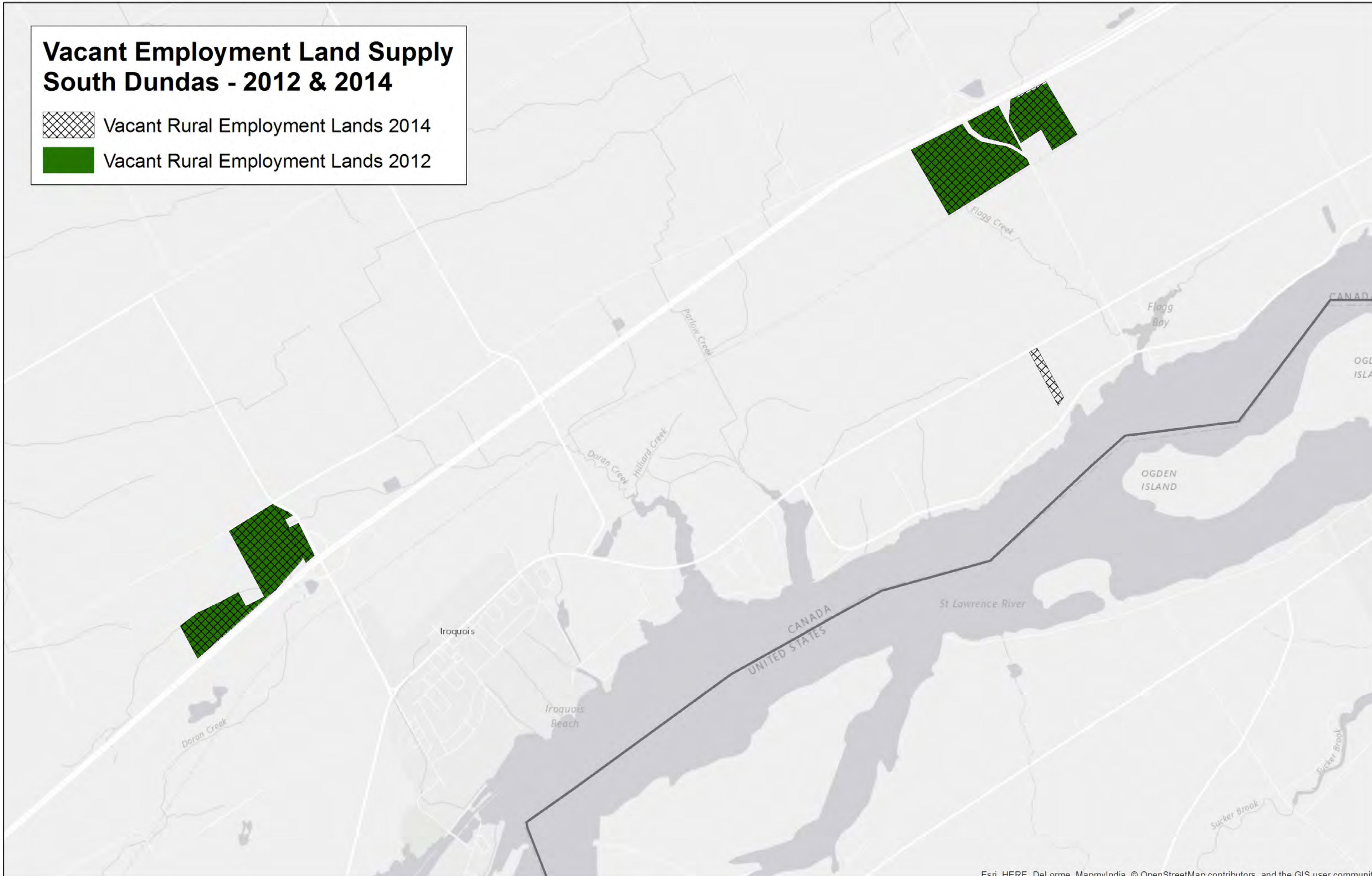
Vacant Employment Land Supply
South Dundas - 2012 & 2014
Vacant Rural Employment Lands 2014
Vacant Rural Employment Lands 2012
Flagg Creek
Parlow Creek
Flagg Bay
CANADA
Doran Creek
Hilliard Creek
OGDEN ISLAND
St Lawrence River
CANADA
UNITED STATES
Iroquois
Iroquois Beach
Doran Creek
Sucker Brook
Sucker Brook
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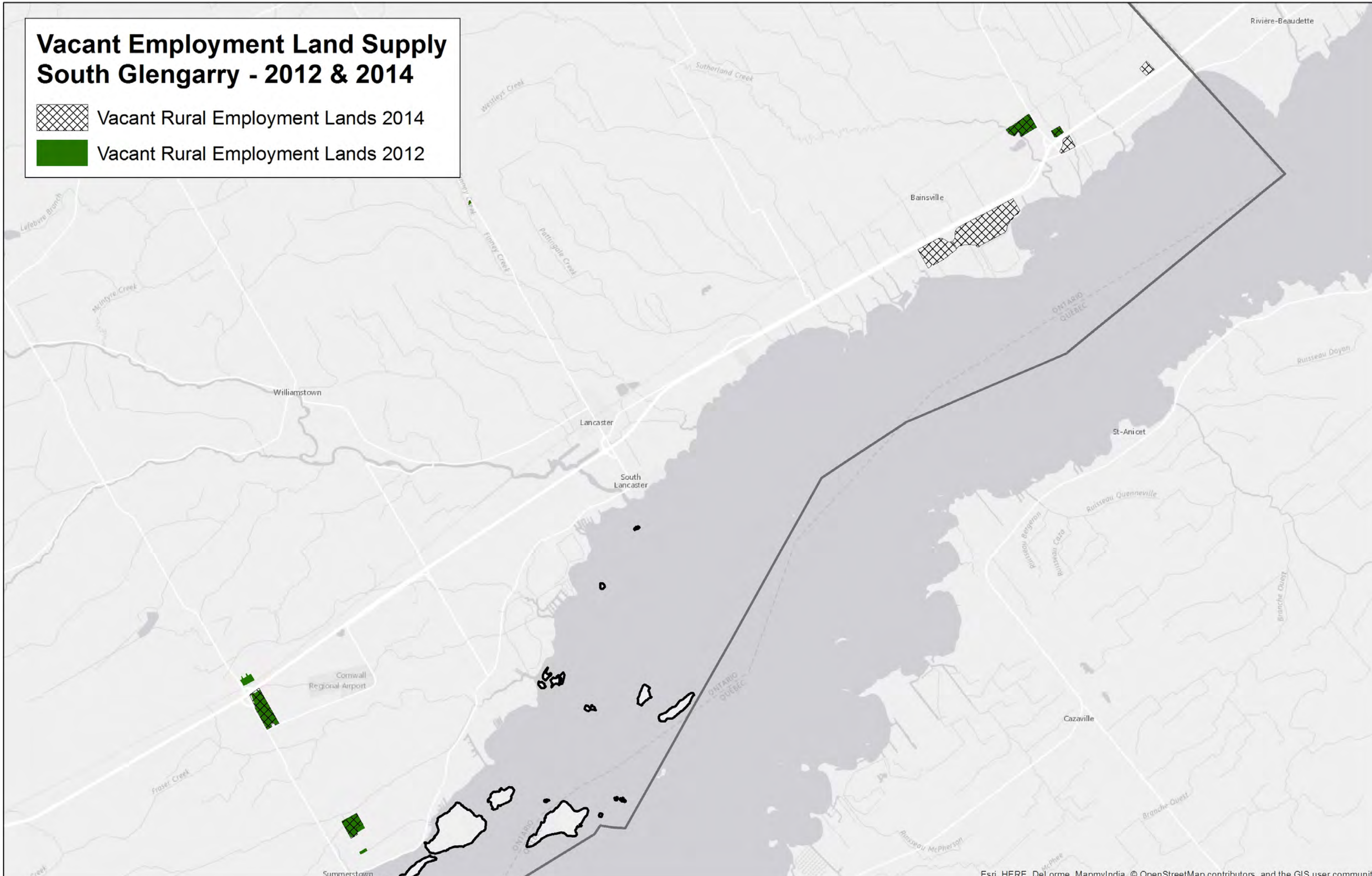
Vacant Employment Land Supply
South Glengarry - 2012 & 2014
Vacant Rural Employment Lands 2014
Vacant Rural Employment Lands 2012
Rivière-Beaudette
Sutherland Creek
Westleys Creek
Bainsville
Lefebvre Branch
Finney Creek
Pattingale Creek
McIntyre Creek
ONTARIO
QUEBEC
Ruisseau Doyon
Williamstown
Lancaster
St-Anicet
South Lancaster
Ruisseau Quenneville
Cornwall Regional Airport
Cazaville
Fraser Creek
Branche Ouest
Ruisseau McPherson
Summerstown
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