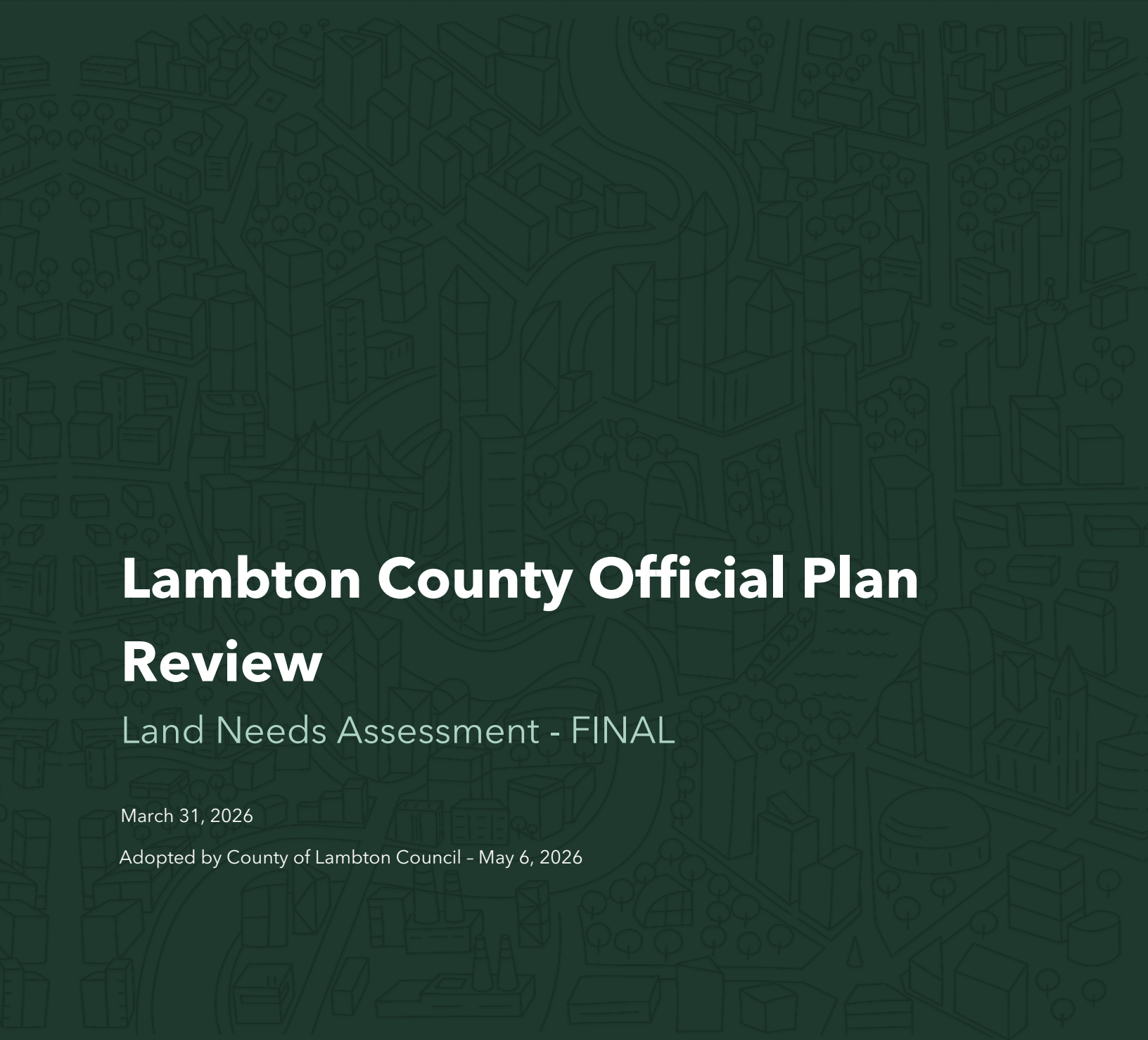


The background of the top half of the page is a dark green, isometric illustration of a city. It features numerous rectangular buildings of varying heights, some with windows, and clusters of small circles representing trees. A winding road or river cuts through the city. The overall style is a detailed, low-poly 3D map.

Lambton County Official Plan Review

Land Needs Assessment - FINAL

March 31, 2026

Adopted by County of Lambton Council - May 6, 2026

Parcel



PREPARED FOR:

County of Lambton

789 Broadway Street, Wyoming, Ontario, N0N 1T0

PREPARED BY:

Parcel Economics Inc.

250 University Avenue, #217, Toronto, Ontario, M5H 3E5

info@parceleconomics.com

416-869-8264

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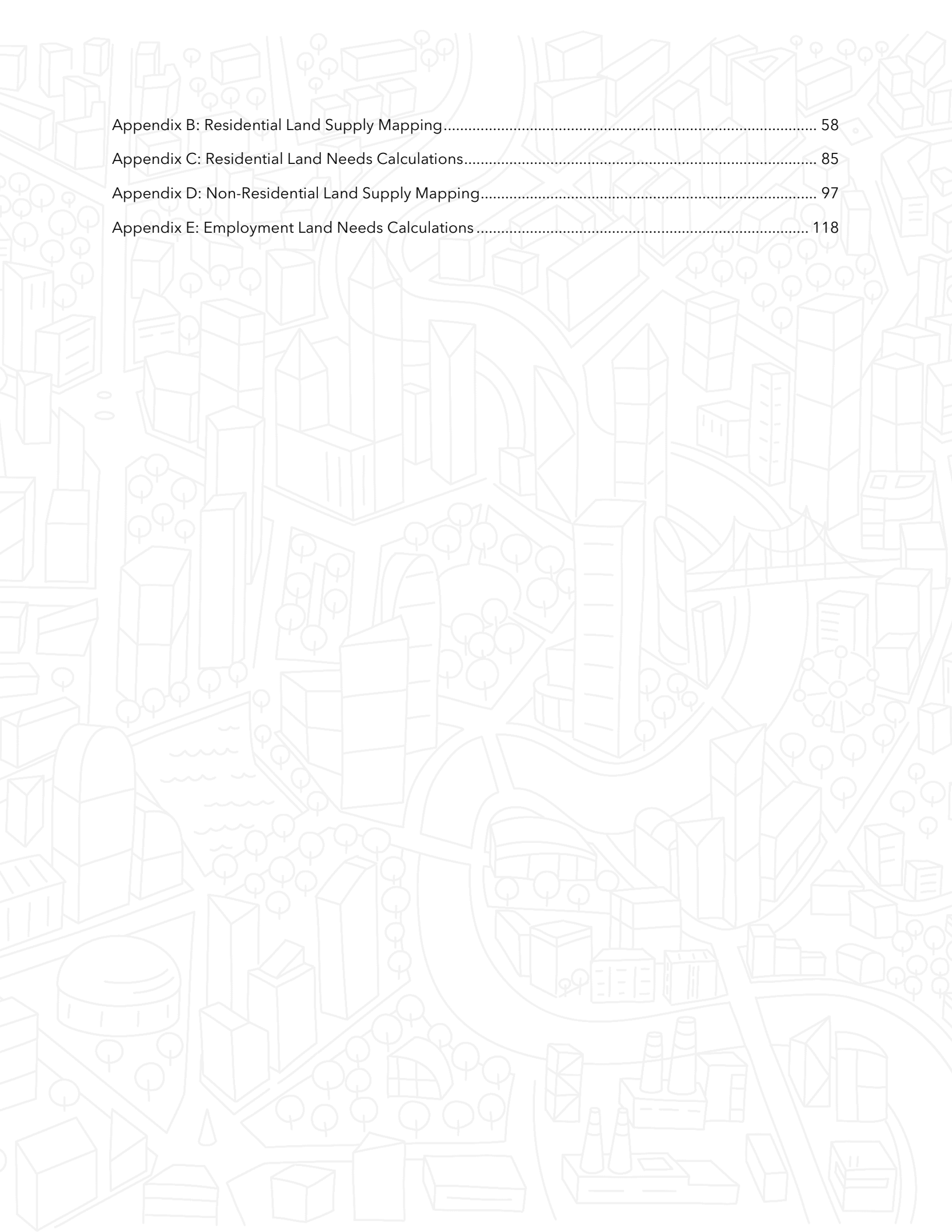
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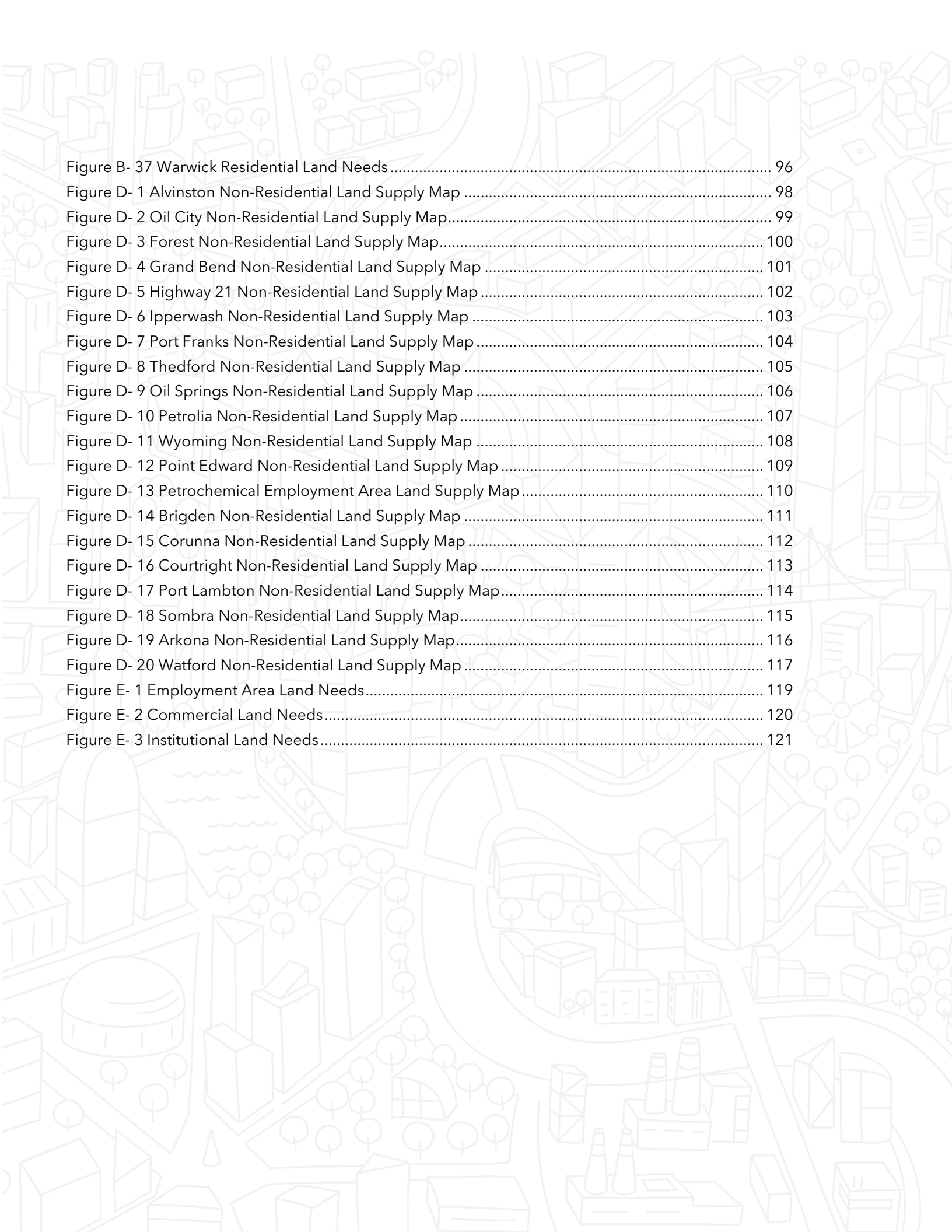


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1.0

Introduction

1.1 Background

Parcel Economics Inc. ("Parcel") has been retained by Lambton County ("the County") alongside NPG Planning Solutions ("NPG") and metro economics to prepare an Official Plan Review of the County of *Lambton Official Plan, October 1, 2020 Office Consolidation* ("Lambton County OP").

Located in Southwestern Ontario, the County is comprised of 11 lower-tier municipalities, including several large Towns and the City of Sarnia. Many of these municipalities are experiencing significant growth in comparison to historical trends. Therefore, it is important to ensure that the supply of land for residential, industrial, commercial and institutional uses is aligned to recent growth trends.

The Lambton County OP was last updated in 2016, adopted by Council of the County of Lambton in September 2017 and approved with modifications by the Ministry of Municipal Affairs in March 2018. Therefore, the Lambton County OP also requires an update to conform with the requirements of the *Planning Act* and also conform with the *Provincial Planning Statement* ("PPS"), 2024, which came into effect on October 20, 2024 and replaced the *Provincial Planning Statement, 2014*, which was in effect at the time of the last official plan review.

This Official Plan Review provides the opportunity for the County to align with updated legislation while also providing the opportunity for land supply estimates to be updated to align with heightened growth projections.

In accordance with PPS 2024, Parcel has completed a review of the County's land supply analysis, by municipality, to determine if the County has sufficient land to accommodate 30 years of population and employment growth. As part of this review and update, consideration and recognition of the work already completed for the City of Sarnia, as part of their own municipal process, has been relied upon and utilized.

Using the most recent Statistics Canada Census of the Population (2021) and additional data sources, the enclosed report is intended to understand the potential residential, employment, commercial, and institutional land needs to 2051.

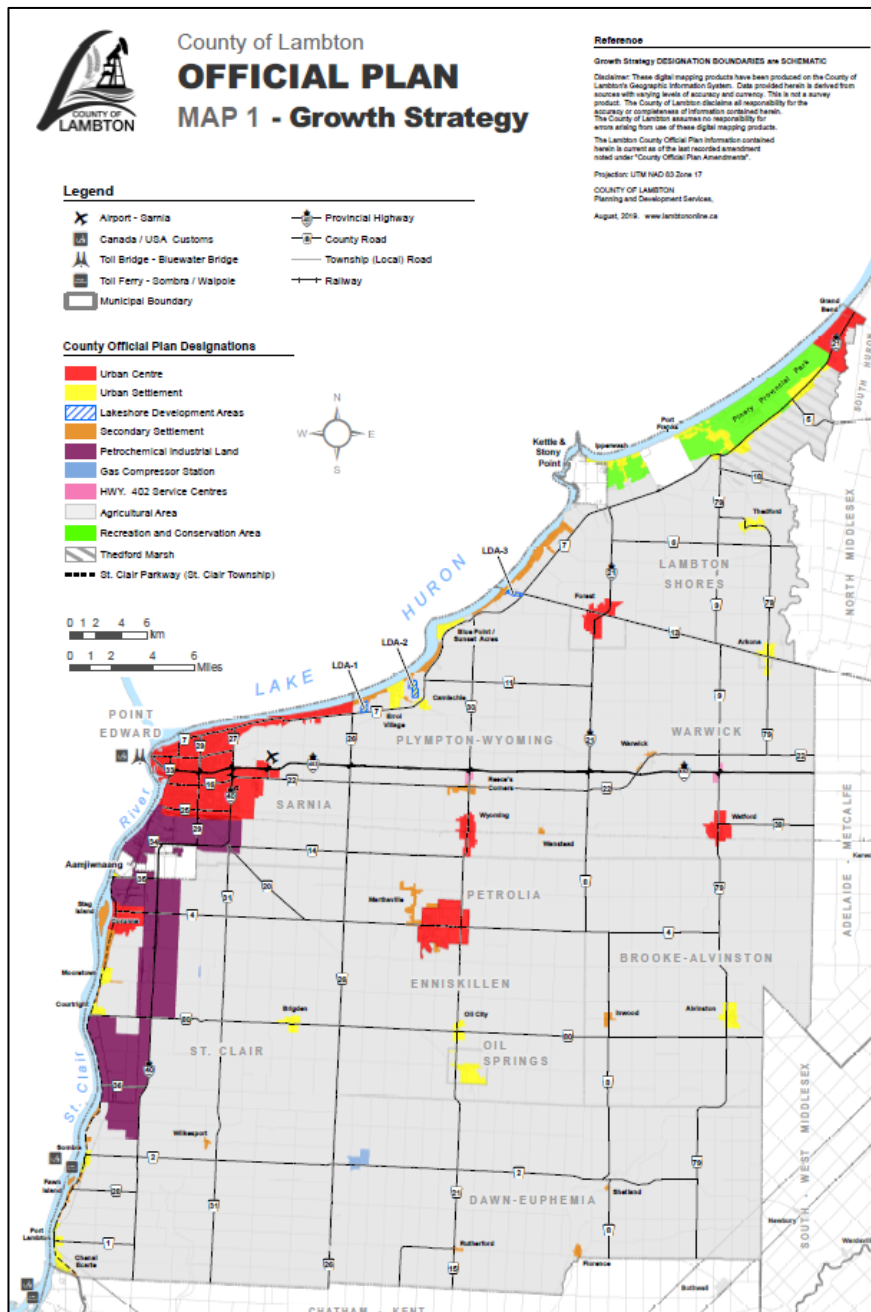
1.2 Purpose

The purpose of this Land Needs Assessment is to determine whether there is sufficient land within Lambton County's Urban Centres and Urban Settlements to accommodate updated population and employment growth forecasts for Lambton County, and each lower-tier municipality, to 2051. The analysis herein reviews past growth trends and summarizes land supply and demand estimates on both a municipality-specific and county-wide level. In total, Lambton County contains seven Urban Centres along with 19 Urban Settlements that are positioned to

accommodate growth. It is anticipated that this Land Needs Assessment will play a key role in establishing future growth management policy direction across the County as part of the Official Plan Review.

Figure 1.1

Lambton County Growth Strategy



2.0

Policy Context

The Lambton County OP Review, as well as this supporting Land Needs Assessment are required to follow applicable policy requirements in the PPS, 2024. The following provides a review of relevant sections of the PPS, 2024 and the in-force Lambton County OP, which have informed this Land Needs Assessment.

2.1 Provincial Planning Statement, 2024

In August 2024, the Ministry of Municipal Affairs and Housing (“MMAH”) released the PPS, 2024, which came into effect in October 2024. The PPS, 2024 is issued under the authority of Section 3 of the *Planning Act* and is the primary provincial land use planning policy document, applying across Ontario. The PPS 2024 replaces both the previous Provincial Policy Statement, 2020.

Section 2.1 Planning for People and Homes of the PPS 2024, provides guidance on the population and employment forecasts that shall be used by planning authorities in planning for growth, where it states:

1. *As informed by provincial guidance, planning authorities shall base population and employment growth forecasts on Ministry of Finance 25-year projections and may modify projections, as appropriate.*
2. *Notwithstanding policy 2.1.1, municipalities may continue to forecast growth using population and employment forecasts previously issued by the Province for the purposes of land use planning.*
3. *At the time of creating a new official plan and each official plan update, **sufficient land** shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of at least 20 years, but not more than 30 years, informed by provincial guidance. Planning for infrastructure, public service facilities, strategic growth areas and employment areas may extend beyond this time horizon. (emphasis added)*

Consistent with these policies in Section 2.1 of the PPS, 2024 this report forecasts population, housing and employment growth across Lambton over the 30 year planning period to 2051, based on the October 2024 Ontario Population Projections, prepared by the Ontario Ministry of Finance.

Section 2.3.1 pertains to general policies for settlement areas, stipulating that they are to be the focus of growth and development in municipalities, where it states:

1. *Settlement areas shall be the focus of growth and development. Within settlement areas, growth should be focused in, where applicable, strategic growth areas, including major transit station areas.*
2. *Land use patterns within settlement areas should be based on densities and a mix of land uses which:*
 - a) *efficiently use land and resources;*
 - b) *optimize existing and planned infrastructure and public service facilities;*
 - c) *support active transportation;*
 - d) *are transit-supportive, as appropriate; and*
 - e) *are freight-supportive.*
3. *Planning authorities shall support general intensification and redevelopment to support the achievement of complete communities, including by planning for a range and mix of housing options and prioritizing planning and investment in the necessary infrastructure and public service facilities.*
4. *Planning authorities are encouraged to establish and implement minimum targets for intensification and redevelopment within built-up areas, based on local conditions.*
5. *Planning authorities are encouraged to establish density targets for designated growth areas, based on local conditions. Large and fast-growing municipalities are encouraged to plan for a target of 50 residents and jobs per gross hectare in designated growth areas.*
6. *Planning authorities should establish and implement phasing policies, where appropriate, to ensure that development within designated growth areas is orderly and aligns with the timely provision of the infrastructure and public service facilities.*

The PPS, 2024 does not identify a minimum target for intensification within built-up areas, as these targets in official plans are intended to reflect local conditions. As noted in Policy 2.3.5 of the PPS, 2024, planning authorities are also encouraged to establish density targets for designated growth areas that reflect local conditions and needs, while large and fast-growing municipalities are encouraged to plan for a target of 50 residents and jobs per

hectare. The list of large and fast-growing municipalities is identified in Schedule 1 of the PPS, 2024. There are no municipalities in Lambton County that are identified in Schedule 1.

Policies in Section 2.3.2 establish policies for new settlement areas or expanding settlement area boundaries to designate or plan for additional land to accommodate growth. Opportunities for settlement area boundary expansion may only be identified where there is a need to designation and plan for additional lands and there is sufficient capacity across existing or planned infrastructure and public service facilities.

As it relates to Employment Areas, the PPS, 2024 identifies permitted uses within Employment Area, which mirrors the definition introduced in the *Planning Act* under Bill 97. Where Employment Areas are defined as:

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

Unlike the Provincial Policy Statement, 2014, which permitted office, institutional and associated retail facilities in Employment Areas, the new definition of Employment Area no longer includes office, institutional and commercial (retail) uses as permitted uses, unless affiliated with a primary employment uses.

Policies in Section 2.8.2 more specifically state:

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.*
2. *Planning authorities shall protect employment areas that are located in proximity to major goods movement facilities and corridors, including facilities and corridors identified in provincial transportation plans, for the employment area uses that require those locations.*
3. *Planning authorities shall designate, protect and plan for all employment areas in settlement areas by:*
 - a) *planning for employment area uses over the long-term that require those locations including manufacturing, research and development in connection with manufacturing,*

warehousing and goods movement, and associated retail and office uses and ancillary facilities;

b) prohibiting residential uses, commercial uses, public service facilities and other institutional uses;

c) prohibiting retail and office uses that are not associated with the primary employment use;

...

The PPS, 2024 provides municipalities more control over Employment Area conversions, allowing the removal of lands from employment areas at any time, subject to satisfying conversion criteria detailed in Policy 2.8.2.5.

2.2 Lambton County Official Plan

The Lambton County OP, declared in full force and effect in 2018 includes policies associated with development and growth in Section 3.0 – County Growth and Development. This includes guidance for development across the diverse areas that form the County, and key direction for population and employment growth.

The Lambton County OP creates a focus for development in established Urban Centres and Urban Settlements, including areas with full municipal water and sewage services. It seeks to ensure the continued success of existing industrial and commercial areas, while also encouraging a diversity of employment, housing and land uses. Section 3.1 Anticipating Growth, discusses how the County and each municipality should plan for growth, specifically stating in Policy 3.1.2 that:

In order to effectively accommodate anticipated growth, local municipalities will ensure that adequate lands are designated and made available for development consistent with the overall County development strategy established by this Plan.

Section 3.3 also highlights the role of Local Planning, identifying that it is the responsibility of each municipality to determine detailed land needs and settlement boundaries under direction of the Lambton County OP. The importance of preserving for commercial and industrial opportunities in Lambton are also included in the Lambton County OP through Section 3.4 through 3.6.

Settlements per the Lambton County OP includes areas defined as Urban Centres, Urban Settlements and Secondary Settlements. Urban Centres and Urban Settlements are anticipated to accommodate the majority of

future growth, with a particular focus on areas with full municipal services, sufficient water and sewer services, and community services. These areas contain the greatest diversity of residential, institutional, commercial, and industrial lands uses and cultural nodes, enhancing opportunities for residents, employees and visitors (Policy 3.2.2, 3.2.3).

As it relates to housing, Section 2.3.12 identifies that local municipalities are encouraged to provide opportunities for intensification. Specifically, it is the goal of the current Lambton OP that 20% of new housing units are provided through intensification and redevelopment.

Secondary Settlements are not to be the focus of growth given their more limited land uses and servicing. Development in Secondary Settlements is instead limited to infilling and some rounding of existing development (Policy 3.2.4). All lands outside of Centres and Settlements are captured in the County's Agricultural Area. These areas are intended as natural areas or as areas for agricultural development, but may contain cultural nodes.

3.0

County-Wide Population and Employment Growth

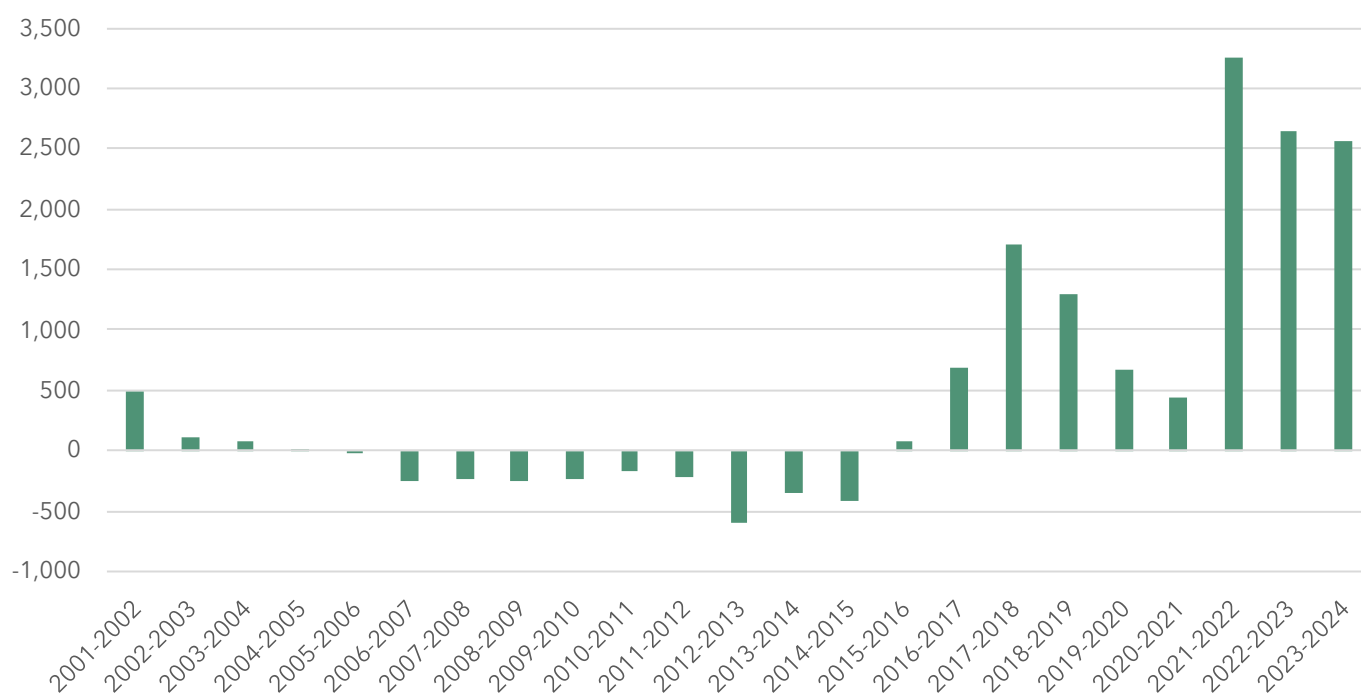
3.1 Past Growth Trends

Historical Population Growth

Figure 3.1 details historical population growth trends across Lambton County since 2001. During this period, population in Lambton County increased by about 11,300 persons, or an average growth rate of about 0.4% per year. However, it is evident that population growth is a tale of two periods. From 2001 to 2015, the population in Lambton County declined by about 2,000 persons, or a loss of about 145 persons per year. In 2016 this was a shift in population growth trends. Since 2016, the County has added 13,300 persons, or nearly 1,500 persons per year.

Figure 3.1

Population Growth, 2001-2024, Lambton County



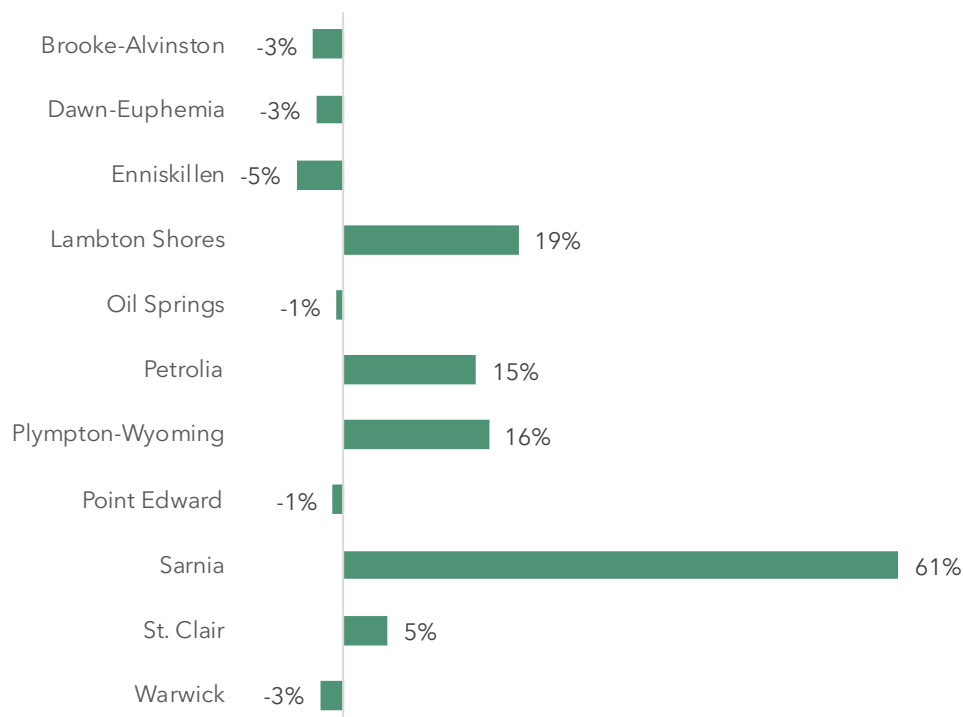
Source: Parcel based on Statistics Canada.

Regionally, while Sarnia accounted for the largest share of population growth within Lambton County, as shown in Figure 3.2, Lambton Shores, Plympton-Wyoming and St. Clair have also experienced population growth, specifically

during the period since 2016. Further, aside from Point Edward and Warwick, the municipalities that lost population between 2001 and 2024 are municipalities that do not have a designated Urban Centre to accommodate growth.

Figure 3.2

Population Growth 2001-2024 by Municipality



Source: Parcel based on Statistics Canada.

Historical Household Growth

Figure 3.3 details average annual household growth trends across Lambton County between 2001 and 2021. During this period, Lambton County added approximately 275 households per year, or an average annual growth rate of 0.5%. As shown, household growth was stronger in the 2001 to 2011 period, when the population in the County was declining. More recently, household growth has slowed, despite there being a shift to population growth in the County.

Figure 3.3

Average Annual Household Growth, 2001 - 2021, Lambton County

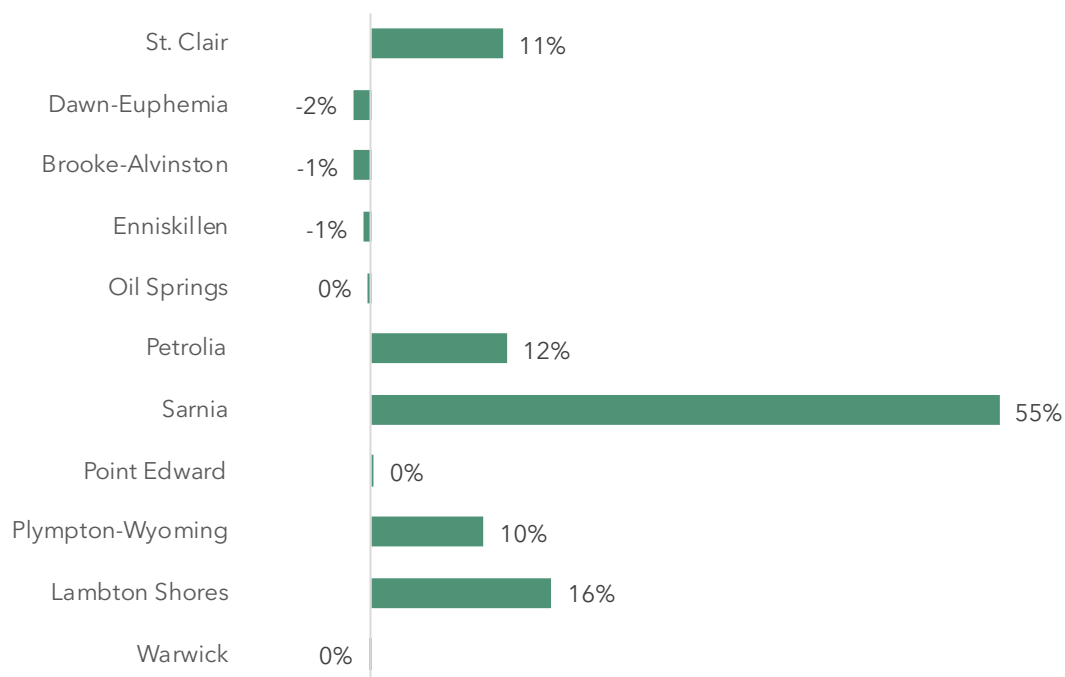


Source: Parcel based Census of Canada.

Similar to population growth trends, as shown in Figure 3.4, the City of Sarnia has accounted for approximately half of household growth in the County, followed by Lambton Shores, St. Clair, Petrolia and Plympton-Wyoming. Therefore, household growth is largely being accommodated in municipalities that have a designated Urban Centre.

Figure 3.4

Household Growth, 2001-2021 by Municipality



Source: Parcel based Census of Canada.

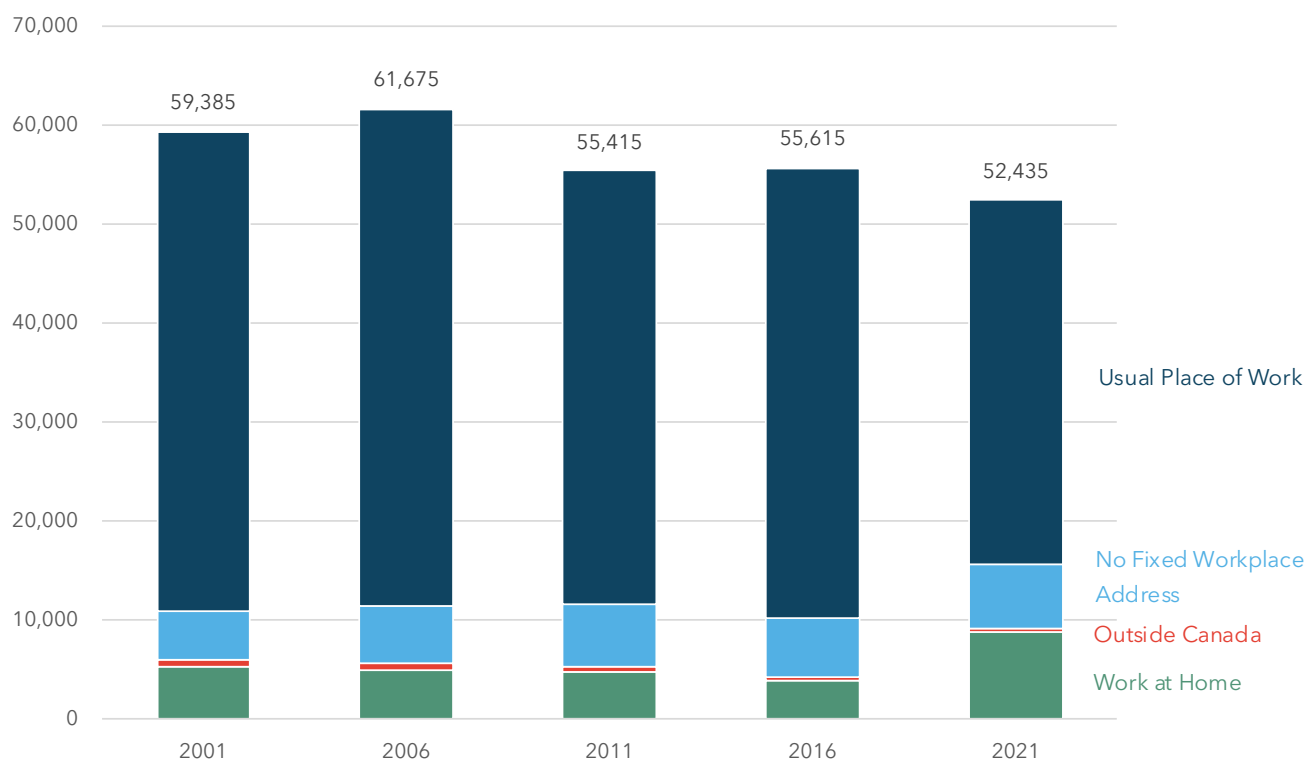
Historical Employment Growth

Figure 3.5 summarizes employment by place of residence in Lambton County since 2001. This refers residents in Lambton County and their usual place of employment. As shown, the number of employed Lambton County residents has been declining since the peak reached in 2006. It is also clear that the majority of employed Lambton County residents go to a usual place of work (whether it's within Lambton County, or in a neighbouring municipality).

However, the number of employed residents with a usual place of work has been declining, while the share of residents reporting no fixed workplace address or working from home has been increasing. If these trends continue, it will have an impact on land needs.

Figure 3.5

Employment by Place of Residence, Lambton County

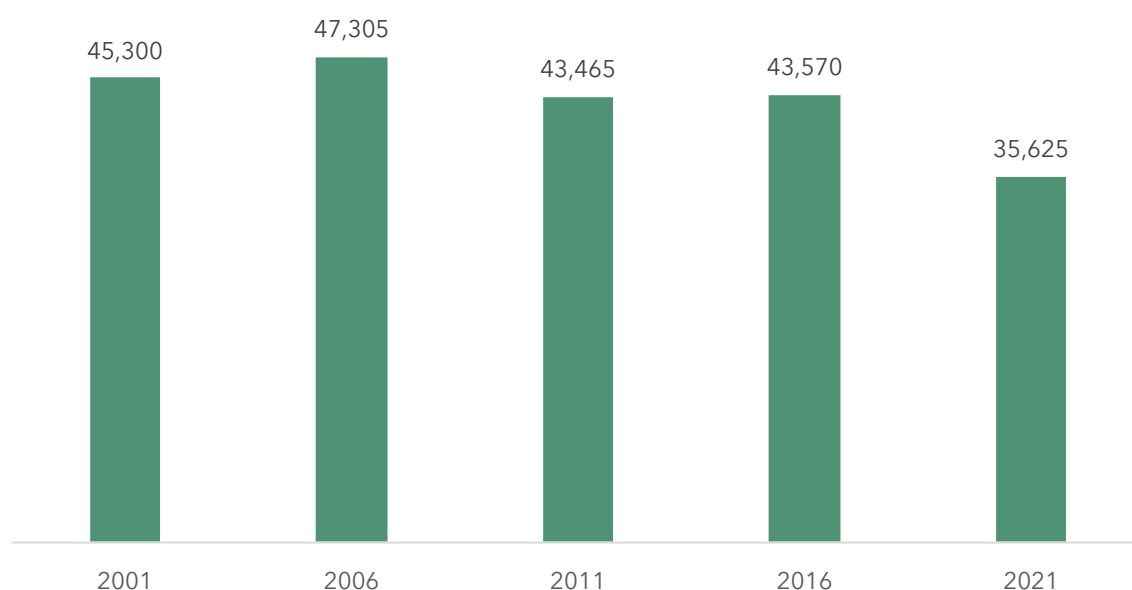


Source: Parcel based Census of Canada.

To gain a better understanding of potential need for non-residential lands, Figure 3.6 summarizes the number of people from the Census of Canada that have a usual place of work in Lambton County. As shown, although the number of people with a usual place of work in Lambton County is below the peak experienced in 2006, it has remained relatively stable, aside from 2021, due to the COVID-19 pandemic.

Figure 3.6

Employment by Usual Place of Work in Lambton County



Source: Parcel based Census of Canada.

3.2 Forecast Methodology

metro economics was engaged as part of the Lambton County OP to prepare population, household and employment forecasts for Lambton County and each lower-tier municipality. The forecasts prepared by metro economics align with the 2051 population forecast for Lambton County that are contained in the Ministry of Finance October 2024 Ontario Population Projections and were further extended to the year 2056.

The base year for the land needs assessment is 2021, to align with recent land supply information across the County and the most recent Census of Canada. The 2051 population forecasts prepared by metro economics and identified in the October 2024 Ontario Population Projections were utilized in preparing this land needs assessment, as it results in a 30-year planning horizon, consistent with the maximum horizon identified in the PPS, 2024.

As a first step in forecasting growth, metro economics carries out a location quotient procedure to determine industries that serve as key economic drivers in each municipality. The potential for growth in economic-driver employment is determined by assuming growth in local drivers will match the pace projected for them Ontario-

wide by metro economics' detailed national-provincial projection system. metro economics' national-provincial projection system considers factors such as the potential for growth in the United States economy; the need for higher immigration flows from now through 2056 to replace retiring Baby Boomers country-wide; the short and longer term impacts of COVID-19 on the economy and migration patterns migration patterns; shifts in the way goods are purchased by and shipped to households, among other factors.

In addition to local employment opportunities, the potential for growth in Lambton County residents commuter jobs was then determined by metro economics' base case projections for employment by place-of-work trends across Ontario and other nearby communities to which Lambton County residents commute.

The employment driver projections and commuter potential projections, in turn, inform the potential population of Lambton County over the forecast period which, in turn, determines the potential for growth in jobs in those industries serving the local population of Lambton County (the community base or population serving jobs), in addition to anticipated growth in jobs affiliated with industrial and office uses.

Total growth forecasts identified for Lambton County are then allocated to each lower-tier municipality within the County based on employment growth potential and commuter trends. This includes detailed estimates of sector-specific employment forecasts, household growth by unit type, and sources of population change (migration, natural increase), as well as population growth by age cohort.

City of Sarnia Comprehensive Review

The City of Sarnia—as part of their *Comprehensive Review: Growth Management Recommendations Sarnia, Ontario* ("Sarnia Comprehensive Review"), which was prepared as input to their new Official Plan in 2022, prepared population and employment forecasts to 2046 in collaboration with metro economics. Recognizing the recency of these forecasts and in consideration and recognition of the work done by the City of Sarnia as part of their own municipal process, Parcel has relied on the analysis and methodology in the Sarnia Comprehensive Review as input to this reporting for Lambton County.

That said, to ensure alignment between these forecasts and those detailed herein, metro economics has extended forecasts prepared for the City of Sarnia to 2051 and 2056, relying on input and assumptions from the October 2024 Ontario Population Projections.

See **Appendix A** for the metro economics forecast methodology and detailed forecasts.

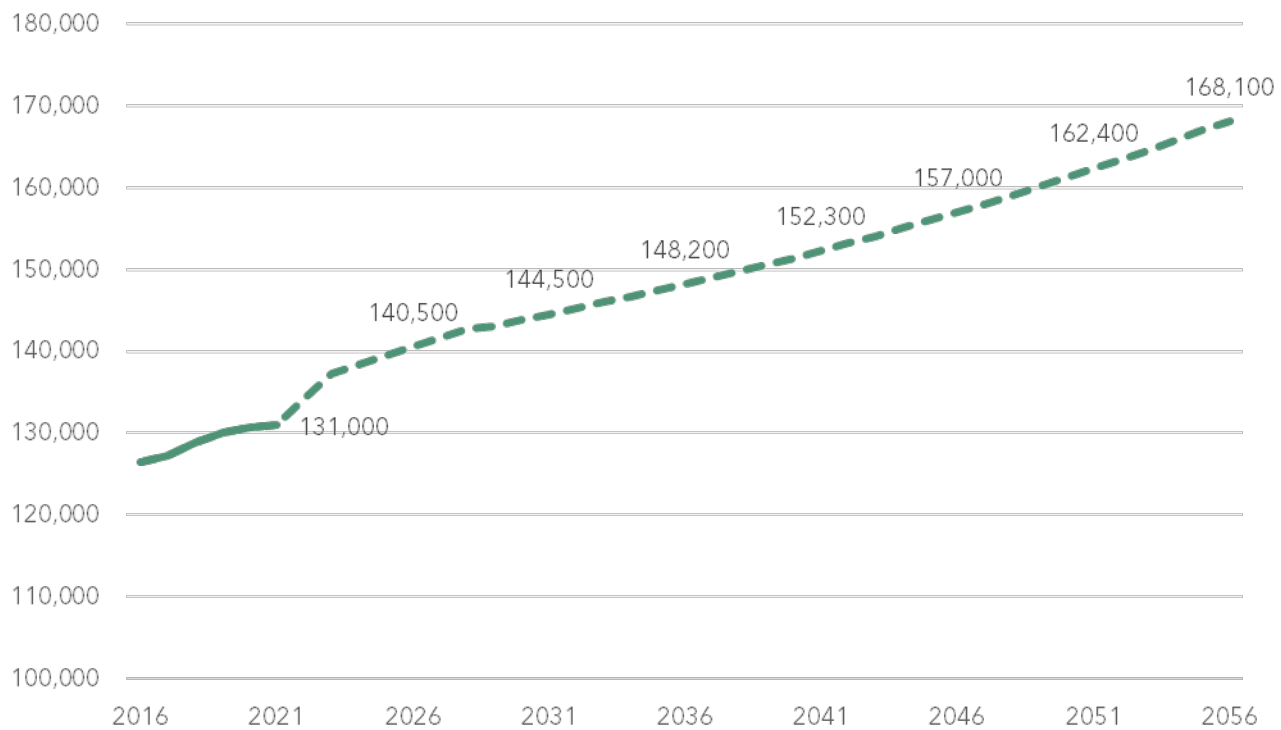
Forecast Population Growth

metro economics then prepared forecasts for Lambton County and each lower-tier municipality to 2051 and 2056. These forecasts, as previously mentioned, align with Ontario Population Projections prepared by the Ministry of Finance in Fall 2024 to 2051, and were then extended to 2056 by metro economics.

Based on this forecast, the population of Lambton County is forecast to grow to approximately 162,400 persons by 2051. This represents growth of approximately 31,365 persons, or 0.8% per year between 2021 and 2051, slightly above average annual growth rates experienced across Lambton County between 2001 and 2024, but slower than the 1.1% growth rate experienced between 2016 and 2024. Therefore, the population in Lambton County is anticipated to grow at a faster rate than past trends, but at a slower pace than experienced more recently.

Figure 3.7

Population Forecast, 2021-2056, Lambton County



Source: Parcel, based on data provided by metro economics. Rounded to the nearest 100 persons.

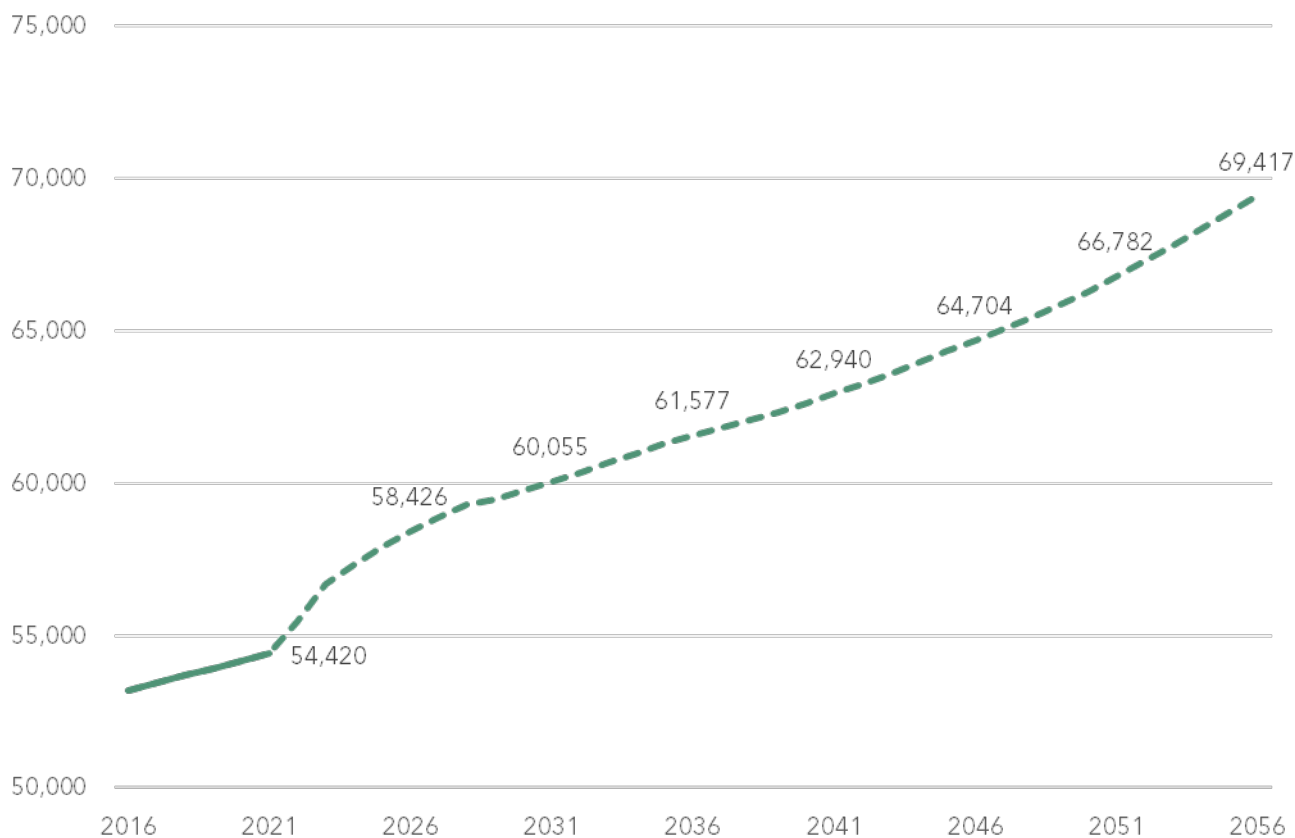
Household Growth Forecasts

metro economics translated population growth forecasts detailed above into household growth forecasts using age-specific household formation rates. These forecasts reflect the number of households necessary to accommodate current and future full-time residents of Lambton County.

Specifically, Figure 3.8 shows that between 2021 and 2051, the County is forecast to grow to 66,782 households. This represents growth of 12,362 households over this period, average annual growth 0.8%.

Figure 3.8

Household Growth Forecasts, 2021 - 2056, Lambton County



Source: Parcel, based on data provided by metro economics.

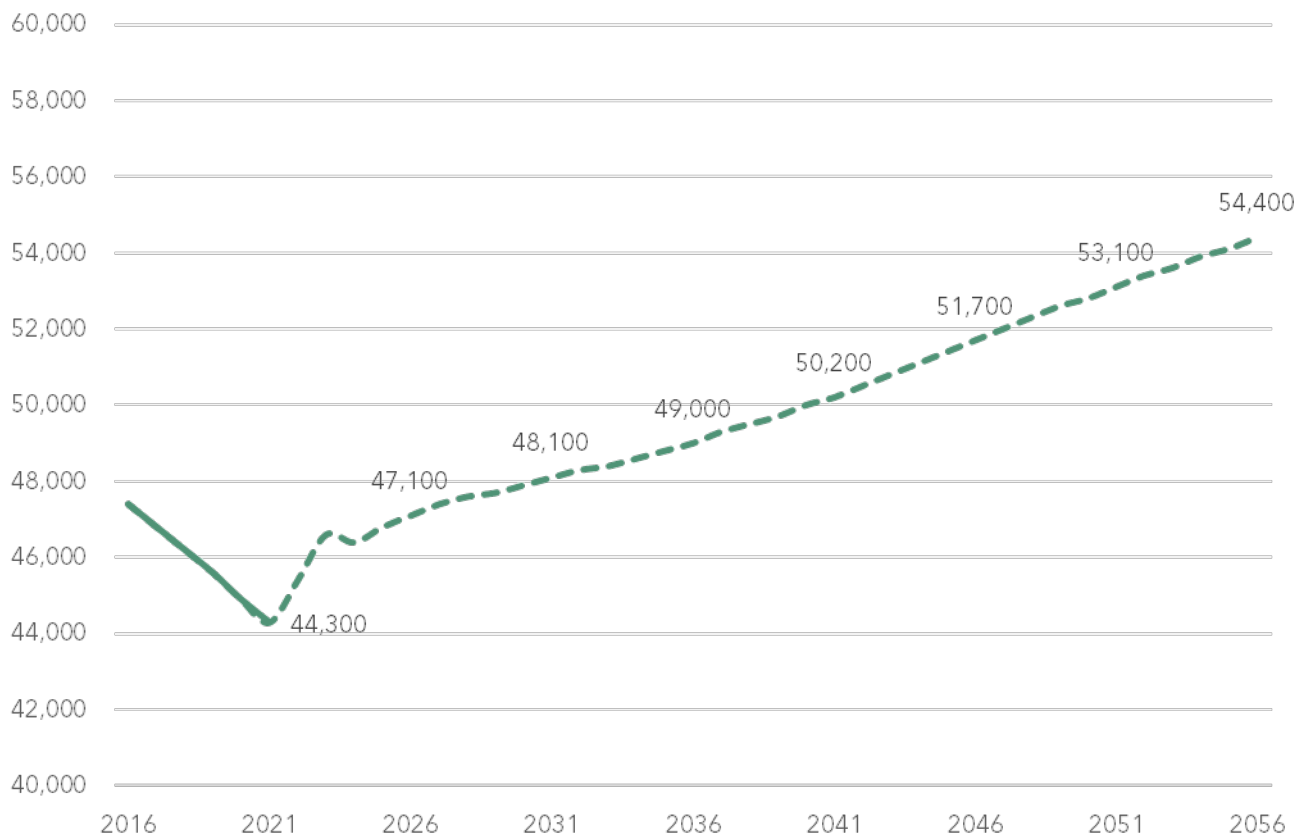
However, in accordance with the PPS, 2024, this Land Needs Assessment focuses on if existing lands in Lambton County are sufficient to accommodate residential demand over a 30-year projection period to 2051. Based on Figure 3.8, households in Lambton County are anticipated to grow to 66,782 households by 2051. This represents growth of 12,362 households between 2021 and 2051.

Forecast Employment Growth

Figure 3.9 shows forecasted employment growth for Lambton County to 2056. This includes people with a usual place of work in Lambton County and people working from home. As shown, Lambton County is forecast to add 8,800 jobs between 2021 and 2051, representing an average annual increase of 0.7% over this forecast period.

Figure 3.9

Employment Forecast, 2021-2056, Lambton County



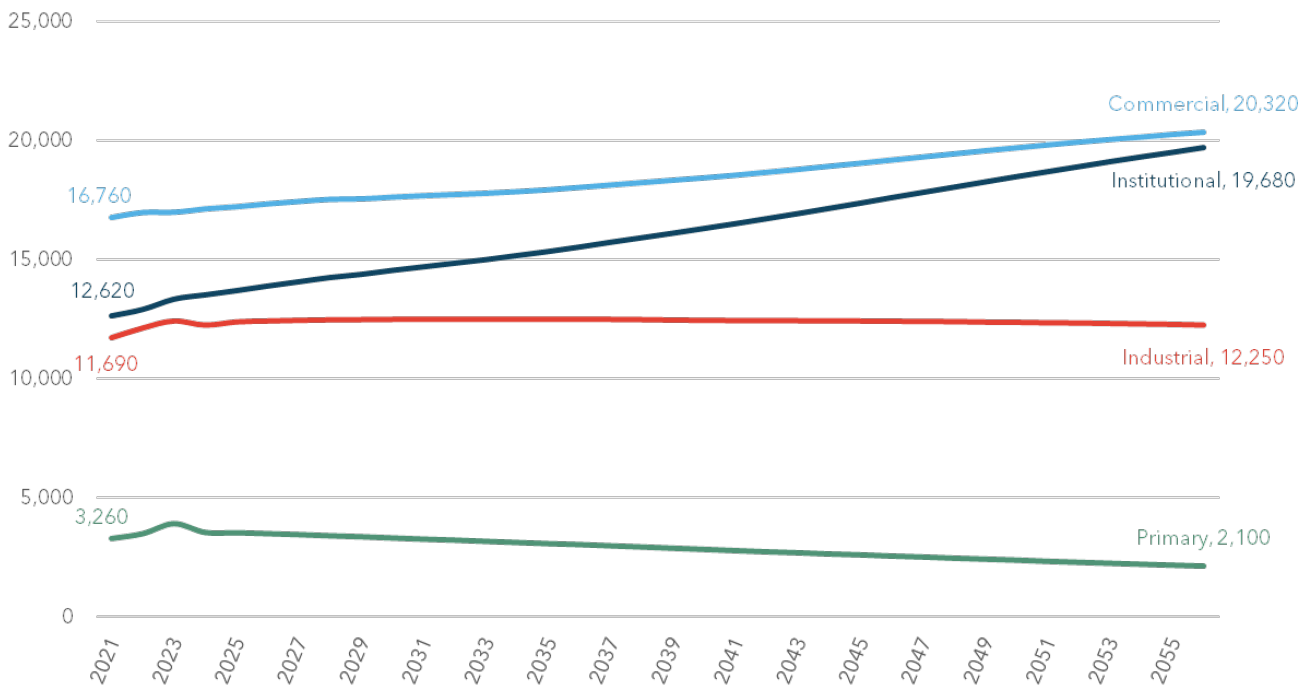
Source: Parcel, based on data provided by metro economics. Rounded to the nearest 100 jobs.

Figure 3.10 shows how employment growth is forecasted to change going forward. As shown, the nearly all employment growth is anticipated to occur in the commercial and institutional sectors of the economy. While there is anticipated to be some growth in the industrial sector, employment will largely remain stable.

Primary jobs are actually anticipated to decline over this period, decreasing by 1.0% per year on average. In 2056, Primary employment is anticipated to comprise just 2,100 jobs in Lambton County, less than 4% of all jobs forecast in the County.

Figure 3.10

Employment Forecast by Employment Category, 2021-2056, Lambton County



Source: Parcel, based on data provided by metro economics. Rounded to the nearest 10 jobs.

4.0

Residential Land Needs Assessment

4.1 Housing Demand

Household Growth

Based on population growth allocations prepared by metro economics and calculated headship rates¹ from the 2021 of Canada, household forecasts were prepared for each lower tier municipality in the County. In addition to historical growth trends, and the share of the Lambton County population that has historically been accommodated to each municipality, this allocation process also considers the reality that population and household growth typically occurs when and where economic base jobs or commuting opportunities are growing or when people are choosing to retire in the area.

Dwelling preferences by age and structural type were then applied to household growth projections to determine the potential type of dwelling growth that is anticipated across each municipality. Figure 4.1 details the results of this assessment. As shown, over half of household growth (53%) during this period is forecast to occur in the City of Sarnia, followed by St. Clair, Plympton-Wyoming and Lambton Shores. The remaining seven municipalities are anticipated to account for a total of 13% of household growth.

County-wide, single and semi-detached units are anticipated to represent 80% of household growth, with apartment units (low-rise and high-rise) accounting for 13% of household growth.

¹ Headship rates are the ratio of the number of people, by age group, identified as the primary household maintainer, divided by the number of people in the same age group. Therefore, it reflects the proportion of adults in the population that are the head of the household.

Figure 4.1

Household Growth Forecast by Housing Type & Municipality, 2021 - 2051

	Single/ Semi-Detached	Row	Apartment & Other	Accessory Unit	Total
Brooke-Alvinston	221	0	10	0	232
Dawn-Euphemia	166	0	0	0	166
Enniskillen	241	0	11	0	251
Lambton Shores	1,091	91	108	8	1,298
Oil Springs	49	0	40	0	89
Petrolia	463	12	55	12	541
Plympton-Wyoming	1,348	16	72	9	1,445
Point Edward	65	0	-17	-5	44
Sarnia	4,703	403	1,262	175	6,543
St. Clair	1,278	100	107	0	1,484
Warwick	239	8	6	0	252
Lambton County	9,863	629	1,654	198	12,344

Source: Parcel based on data from metro economics.

Seasonal Dwellings

The household growth forecasts prepared by metro economics represent the number of “households” required to accommodate total population growth, or growth in the number of permanent residents. Recognizing that some municipalities in Lambton County have a high proportion of seasonal residents and cottagers, Parcel estimated potential additional households that would be required to support growth in the number of seasonal residents.

Based on data from the Census of Canada between 2001 and 2021, Parcel examined the change in the share of dwelling units that are not occupied by permanent residents. This assessment was done for each municipality, to reflect differences across the County. Based on these historical trends, we forecast the additional dwelling units that could be required to accommodate demand from seasonal residents.

Figure 4.2 shows that this approach results in the need for an additional 503 dwelling units to accommodate potential demand from seasonal residents between 2021 and 2051. As shown, the only municipalities that are anticipated to experience additional demand for seasonal dwellings are Brook-Alvinston, Lambton Shores and St.

Clair. In other municipalities, such as Plympton-Wyoming, which traditionally have a sizable share of seasonal dwellings, there has been a trend towards converting these seasonal dwellings to permanent dwellings.

Figure 4.2

Dwellings Not Occupied by Usual Residents

	Share of Unoccupied Dwellings	Forecast Growth Share 2021-2051	Forecast Unoccupied Units
Brooke-Alvinston	5%	5%	12
Dawn-Euphemia	n.a.	0%	0
Enniskillen	n.a.	0%	0
Lambton Shores	17%	15%	229
Oil Springs	n.a.	0%	0
Petrolia	0%	0%	0
Plympton-Wyoming	-2%	0%	0
Point Edward	50%	0%	0
Sarnia	1%	0%	0
St. Clair	17%	15%	262
Warwick	0%	0%	0
Lambton County			503

Source: Parcel, based on Statistics Canada Census Data and metro economics household growth forecasts.

Allocation of Growth to Settlement Areas

The PPS, 2024 and Lambton County OP direct growth towards Settlement Area lands, specifically those settlement areas with water and sewer services to accommodate growth. As specified in the Lambton County OP, Settlement Areas includes lands designated Urban Centres, Urban Settlements, Secondary Settlements.

To better understand patterns across Lambton County, and each lower-tier municipality, Parcel has examined the share of building permits attributed to each location, in addition to Rural Areas (i.e., “non-urban” areas located outside of urban areas), between 2014 and 2024 (i.e., the period for which data was available through the County).

As shown, in large urban municipalities that contained an urban centre or urban settlement, these areas typically attracted the largest share of development.

Figure 4.3

Residential Building Permits by Policy Area, 2014-2024

	Rural Areas	Secondary Settlement Areas	Urban Centres & Urban Settlements	Total
Brooke-Alvinston	53%	2%	45%	100%
Dawn-Euphemia	97%	3%	0%	100%
Enniskillen	66%	34%	0%	100%
Lambton Shores	6%	2%	92%	100%
Oil Springs	7%	0%	93%	100%
Petrolia	0%	0%	100%	100%
Plympton-Wyoming	9%	15%	76%	100%
Point Edward	0%	0%	100%	100%
St. Clair	11%	13%	76%	100%
Warwick	51%	3%	46%	100%

Note: Excludes the City of Sarnia, as building permit information was not provided.

Source: Parcel.

These historical development trends were used to inform and allocate household growth over the forecast period to 2051. Allocations were also directly informed by policies of the Lambton County OP, which specifies in Section 3.3.2, that the County expects there to be limited development in Secondary Settlements, excepting infilling and the minor rounding of existing development. More broadly, policies of the Lambton County OP also stipulate that future development will be focused in Urban Centres and Urban Settlements.

Figure 4.4 shows the share of household growth that is estimated to occur in each policy area. In-line with policies of the Lambton County OP and historical development patterns, most residential development is forecast to occur in Urban Centres and Urban Settlements, where existing infrastructure and servicing is available. This excludes Dawn-Euphemia, where there is no designated Urban Centres or Urban Settlements. While household growth can occur in Rural Areas and Secondary Settlement Areas on existing vacant lots, Lambton County OP policies state that in Secondary Settlements, growth will be limited to infilling and minor rounding out of development within existing boundaries.

Figure 4.4

Forecast Share of Household Growth, by Municipality & Location

	Rural Areas	Secondary Settlement Areas	Urban Centres & Urban Settlements	Total
Brooke-Alvinston	0%	0%	100%	100%
Dawn-Euphemia	100%	0%	0%	100%
Enniskillen	0%	0%	100%	100%
Lambton Shores	0%	0%	100%	100%
Oil Springs	0%	0%	100%	100%
Petrolia	0%	0%	100%	100%
Plympton-Wyoming	0%	0%	100%	100%
Point Edward	0%	0%	100%	100%
Sarnia	0%	0%	100%	100%
St. Clair	0%	0%	100%	100%
Warwick	0%	0%	100%	100%

Source: Parcel, based on Lambton County Building Permit Data. Allocation for Sarnia is based on the approach and methodology in the Sarnia Comprehensive Review.

Total Housing Demand

Aggregating the assumptions and approach detailed above, results in total housing demand for Lambton County, and each lower-tier municipality, between 2021 and 2051. Figure 4.5 details the results of this analysis, excluding demand affiliated with accessory housing units.

Figure 4.5 excludes accessory dwelling units, as these units represent additional dwellings or living facilities within an existing residence. As a result, accessory housing units do not generate land needs as they are accommodated within existing dwelling units. In forecasting land needs, or housing need across Lambton County to 2051, demand associated with accessory units has been removed from the 2051 forecasts.

Figure 4.5 also includes a policy-based shift in housing demand in Sarnia. This is consistent with the approach in the Sarnia Comprehensive Review and approved Sarnia Official Plan, where an alternative housing growth allocation was assumed to reflect the assumption that the structural propensity of each age cohort in Sarnia would shift towards more row and apartment growth going forward. Recognizing this approach, Parcel updated housing demand estimates for Sarnia based on forecasts prepared by metro economics to 2051, but—in-line with the

allocation by unit type contained in the Sarnia Comprehensive Review. This amounts to demand for 3,793 single- and semi-detached units, 958 row housing units and 1,792 apartment units.

As detailed in Figure 4.4, between 2021 and 2051, there is forecast to be demand for an additional 12,824 housing units across Lambton County.

Figure 4.5

Total Housing Demand, by Type & Municipality, 2021 - 2051

	Single/ Semi-Detached	Row	Apartment & Other	Total (Excl. Accessory Units)
Brooke-Alvinston	233	0	10	244
Dawn-Euphemia	166	0	0	166
Enniskillen	241	0	11	251
Lambton Shores	1,320	91	108	1,519
Oil Springs	49	0	40	89
Petrolia	463	12	55	529
Plympton-Wyoming	1,348	16	72	1,436
Point Edward	65	0	-17	48
Sarnia	3,793	958	1,792	6,543
St. Clair	1,540	100	107	1,746
Warwick	239	8	6	252
Lambton County	9,456	1,184	2,184	12,824

Source: Parcel based on data from metro economics. For the purposes of this assessment, Apartment & Other uses include apartments, other single-detached and moveable dwellings. Accessory units include apartments or flat in a duplex. Estimates for Sarnia are based on updated forecasts for Sarnia prepared by metro economics.

4.2 Housing Supply

Units Under Application

To determine the potential or forthcoming residential supply within each municipality, Parcel has gathered information—in consultation with planning staff at Lambton County—on the number of housing units under application. This includes preliminary applications, draft approved plans, and vacant lots within registered plans of subdivision. To be consistent with the demand forecasts above, for registered plans of subdivision, we have only included lots that remained vacant in mid-2021. Figure 4.6 also summarizes the number of housing units under application in Sarnia. These estimates are consistent with those included in the Sarnia Comprehensive Review, which provided estimates on the number of residential units under construction or in the approvals process.

Identified units under application were categorized by unit type including, single- and semi-detached units, row units, and apartment units. They were also classified by infill and greenfield unit potential to align with the definition of intensification in the Lambton County OP.

Figure 4.6 details that approximately 29% of units under application in Lambton County are considered to be intensification. Among intensification units, apartment units represent 50% of the supply, followed by single/semi-detached units and row units.

Within the greenfield areas, approximately 78% of the supply of units considered under application are single/semi-detached units, followed by row units and a limited number of apartment units.

While Sarnia has the largest supply of units under application, Petrolia and Plympton-Wyoming also account for over one-third of the supply (33%), with 1,136 and 1,088 units respectively. Comparatively, Dawn-Euphemia, Oil Springs, Enniskillen, and Point Edward have limited units in draft approved and registered plans of subdivision.

Figure 4.6

Active Application Unit Potential (Infill and Greenfield)

	Greenfield Units			Infill Units			Intensification Share
	Single / Semi-Detached	Row	Apartment	Single / Semi-Detached	Row	Apartment	
Brooke-Alvinston	57	4	0	24	4	0	31%
Dawn-Euphemia	0	0	0	0	0	0	n.a.
Enniskillen	2	0	0	6	0	0	75%
Lambton Shores	414	34	66	63	5	0	12%
Oil Springs	7	0	0	6	0	0	46%
Petrolia	961	162	0	13	0	0	1%
Plympton-Wyoming	810	108	0	169	0	0	16%
Point Edward	0	0	0	1	5	0	100%
Sarnia	881	309	0	356	74	984	54%
St. Clair	338	0	0	106	114	0	39%
Warwick	224	225	120	25	0	0	4%
Lambton County Total	3,694	842	186	769	202	984	29%

Source: Parcel, based on data provided by Lambton County.

Vacant Lands Within Urban Centres and Urban Settlements

In addition to identifying unit potential across existing applications, other opportunities for residential development across Urban Centres and Urban Settlements in Lambton County were also identified. This included opportunities on vacant lands designated for residential uses (e.g., residential, mixed use residential, etc.) in the Lambton County OP that are not under application (i.e. vacant designated no application lands). In addition to these vacant designated not application lands, lands located within Urban Centres and Urban Settlement that are designated Agricultural in the Lambton County OP have also been assumed as lands that could develop with residential uses over the forecast horizon.

To prevent overestimating of the land supply, vacant designated lands exclude lands that are considered to be non-developable, such as the Natural Heritage System ("NHS") lands.² Additionally, all lots below 200 square metres have been excluded from the land supply, as these existing lots within Urban Centres and Urban Settlements are considered to be too small to accommodate new dwelling units.

² This includes lands designated Natural Heritage System ("NHS") Group A and Group B as defined on 8-1 and 8-2 of Lambton County Official Plan and Significant Woodlands are included under NHS Group B.

This review identified a total of 529.6 gross hectares of net-developable land across Lambton County (excluding Sarnia). As detailed in Figure 4.7, **Plympton-Wyoming and Lambton Shores have the largest supply of vacant designated lands** not under application, with 183.1 and 157.5 hectares, respectively. Figure 4.7 excludes Sarnia as the Sarnia Comprehensive Review identifies the total housing unit supply on vacant designated lands, rather than identifying the potential amount of vacant residential lands in the city.

Figure 4.7

Identified Vacant Designated Land Supply

	Total Vacant Designated (Gross ha)	Greenfield Vacant Designated	Infill Vacant Designated (Gross ha)
Brooke-Alvinston	27.0	26.3	0.7
Dawn-Euphemia	0.0	0.0	0.0
Enniskillen	19.9	19.7	0.2
Lambton Shores	157.5	154.3	3.2
Oil Springs	6.9	6.4	0.4
Petrolia	45.1	44.8	0.3
Plympton-Wyoming	183.1	179.7	3.4
Point Edward	0.1	0.0	0.1
Sarnia	-	-	-
St. Clair	78.4	77.5	0.8
Warwick	11.8	11.4	0.4
Total	529.6	520.0	9.6

Source: Parcel, based on data provided by Lambton County. Excludes Sarnia as the Sarnia LNA includes unit potential on vacant residential lands rather than identifying the total residential land area.

See **Appendix B** for Land Supply Mapping by Municipality

4.3 Residential Land Needs

Parcel has estimated Residential land needs across the County by comparing forecast housing demand against identified housing supply and units that could be accommodated on vacant no application lands, to determine if there is a sufficient supply of land to accommodate household growth, by dwelling types, to 2051.

In determining the need for residential lands, we have applied an intensification rate to each municipality. The intensification rate in Sarnia is based on 45% intensification target identified in Section 4.3 b) of the approved Sarnia Official Plan. For the other municipalities in Lambton County, the assumed intensification rate is based on the identified supply of vacant and underutilized intensification land within the municipality. These intensification rates are summarized in Figure 4.8. As shown, the County-wide intensification rate is 27%, which exceeds the intensification target contained in the in-force Lambton County OP.

Figure 4.8

Intensification Rate

	Intensification Rate
Brooke-Alvinston	15%
Dawn-Euphemia	0%
Enniskillen	5%
Lambton Shores	5%
Oil Springs	15%
Petrolia	5%
Plympton-Wyoming	10%
Point Edward	100%
Sarnia	45%
St. Clair	10%
Warwick	10%
Lambton County	27%

Source: Parcel.

Based on these intensification rates, Figure 4.9 details the number of units that are forecast to be accommodated on Greenfield lands in Lambton County. As shown, County-wide there are anticipated to be an additional 9,154 units accommodated on Greenfield lands between 2021 and 2051.

Figure 4.9

Residential Units Accommodated on Greenfield Lands, 2021 - 2051

	Demand for Greenfield Units			
	Single / Semi-Detached	Row	Apartment	Total
Brooke-Alvinston	204	0	3	207
Dawn-Euphemia	0	0	0	0
Enniskillen	232	0	7	238
Lambton Shores	1,250	83	108	1,441
Oil Springs	43	0	33	76
Petrolia	448	12	44	503
Plympton-Wyoming	1,204	16	72	1,292
Point Edward	0	0	0	0
Sarnia	2,715	884	0	3,599
St. Clair	1,427	45	100	1,571
Warwick	214	8	6	227
Lambton County	7,735	1,047	372	9,154

Source: Parcel.

Figure 4.10 compares the supply of greenfield units under application that was identified in Figure 4.6 to demand for units summarized in Figure 4.9. As shown, aside from Petrolia and Warwick, which has a sufficient number of units under application, all other municipalities will require a portion of household growth between 2021 and 2051 to be accommodated on vacant no application lands.

Figure 4.10

Surplus / (Shortfall) of Greenfield Units to be Accommodated on Vacant No Application Lands (2021-2051)

	Single / Semi-Detached	Row	Apartment	Total
Brooke-Alvinston	(147)	4	(3)	(146)
Dawn-Euphemia	0	0	0	0
Enniskillen	(230)	0	(7)	(236)
Lambton Shores	(836)	(49)	(42)	(927)
Oil Springs	(36)	0	(33)	(69)
Petrolia	513	150	(44)	620
Plympton-Wyoming	(394)	92	(72)	(374)
Point Edward	0	0	0	0
Sarnia	(1,834)	(575)	0	(2,409)
St. Clair	(1,089)	(45)	(100)	(1,233)
Warwick	10	217	114	342
Lambton County	(4,041)	(205)	(186)	(4,432)

Source: Parcel.

The shortfall in residential units in Figure 4.10 is translated into residential land needs based on assumed residential unit densities. These assumptions included 15 units per hectare for single and semi-detached units, 30 units per hectare for row houses, and 50 units per hectare for apartment units. Parcel then applied a gross-to-net factor of 50% to recognize that additional lands will be required internal infrastructure (e.g. internal roads, stormwater management, parks, etc.).³

As shown, while there is anticipated to be a surplus of 27.1 hectares of residential land in the County to accommodate growth to 2051, this masks local imbalances. While there are some municipalities that are anticipated to have a large surplus of residential land to accommodate growth, municipalities such as Enniskillen, Sarnia and St. Clair are anticipated to have a shortfall of land to accommodate housing demand to 2051. Furthermore, the large surplus of residential land in Plympton-Wyoming is associated with the large supply of lands

³ The Sarnia Comprehensive Review applied higher unit density assumptions and a higher net to gross ratio than considered in this land needs assessment. For consistency with other municipalities in Lambton County we have applied the same unit density and net to gross assumptions to each municipality.

designated as Agricultural within the boundaries of the Urban Centre and Urban Settlements, specifically the Lakeshore Development Areas. If the owners of these lands do not have a desire to develop their lands with residential uses due to ongoing farm operations it could result in imbalances in the housing market.

Figure 4.11

Residential Land Needs to 2051

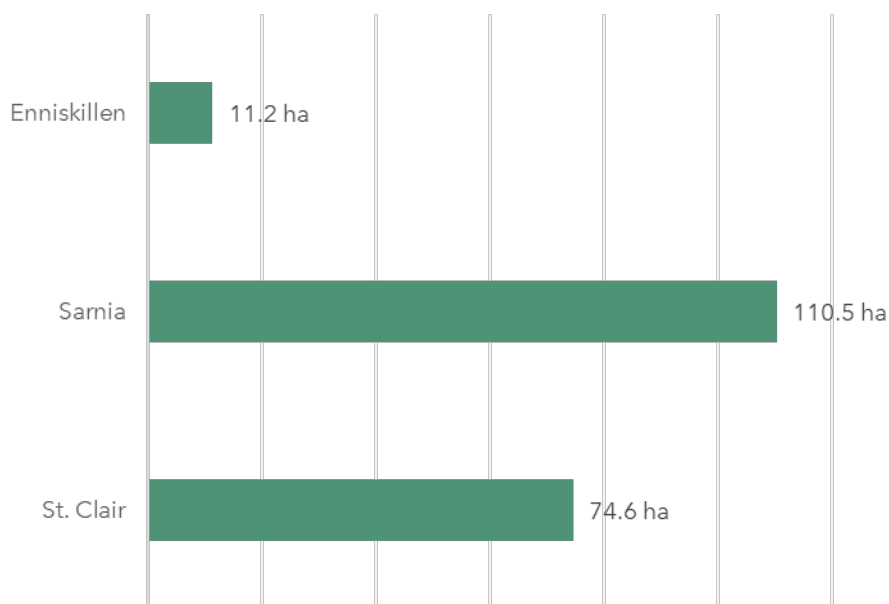
	Demand		Supply	Surplus / (Shortfall) of Land
	Net Residential Land Need	Gross Land Needs	Vacant No Application Land Supply	
Brooke-Alvinston	9.8 ha	19.7 ha	26.3 ha	6.6 ha
Dawn-Euphemia	0.0 ha	0.0 ha	0.0 ha	0.0 ha
Enniskillen	15.5 ha	30.9 ha	19.7 ha	-11.2 ha
Lambton Shores	58.2 ha	116.4 ha	154.3 ha	37.8 ha
Oil Springs	3.0 ha	6.1 ha	6.4 ha	0.4 ha
Petrolia	0.9 ha	1.8 ha	44.8 ha	43.0 ha
Plympton-Wyoming	27.7 ha	55.4 ha	179.7 ha	124.2 ha
Point Edward	0.0 ha	0.0 ha	0.0 ha	0.0 ha
Sarnia	72.2 ha	144.5 ha	34.0 ha	-110.5 ha
St. Clair	76.1 ha	152.1 ha	77.5 ha	-74.6 ha
Warwick	0.0 ha	0.0 ha	11.4 ha	11.4 ha
Lambton County	263.4 ha	526.9 ha	554.0 ha	27.1 ha

Source: Parcel.

Figure 4.12 summarizes recommended settlement area boundary expansions in municipalities where there is not sufficient supply of land within the Urban Centre and Urban Settlement boundaries. As detailed, Lambton County could require an additional 196.3 gross hectares of additional Residential land to accommodate growth to 2051. Based on the methodology and supply identified above, our analysis identified that additional residential lands will be required in Enniskillen, Sarnia and St. Clair. The settlement area boundary expansion required in Sarnia is in addition to the 34 hectares already redesignated from Business Park to Residential as part of the Sarnia Comprehensive Review.

Figure 4.12

Recommended Settlement Area Boundary Expansions



Source: Parcel.

See Appendix C for Land Needs Calculations by Municipality

5.0

Employment Land Needs Assessment

5.1 Employment Growth

Employment Growth Allocation

As previously summarized, employment forecasts for Lambton County were translated into a forecast of employment by employment category (i.e., primary, industrial, commercial and institutional jobs). Each type of employment was then distributed between lower-tier municipalities in Lambton County based on projections prepared by metro economics.

Figure 5.1 details employment growth by type and municipality between 2021 and 2051. As detailed, there is anticipated to be growth of approximately 8,800 jobs between 2021 and 2051.

Figure 5.1

Employment Growth, 2021 - 2051, by Type & Municipality

	Primary	Industrial	Commercial	Institutional	Total
Brooke-Alvinston	-81	3	-3	26	-55
Dawn-Euphemia	-76	22	14	15	-25
Enniskillen	-101	10	26	110	45
Lambton Shores	-161	98	545	634	1,116
Oil Springs	0	8	0	19	27
Petrolia	-35	-30	83	441	459
Plympton-Wyoming	-90	58	216	271	455
Point Edward	-3	51	43	248	339
Sarnia	-163	371	1,837	3,946	5,991
St. Clair	-149	62	250	281	444
Warwick	-92	10	22	65	5
Lambton County	-951	663	3,033	6,056	8,801

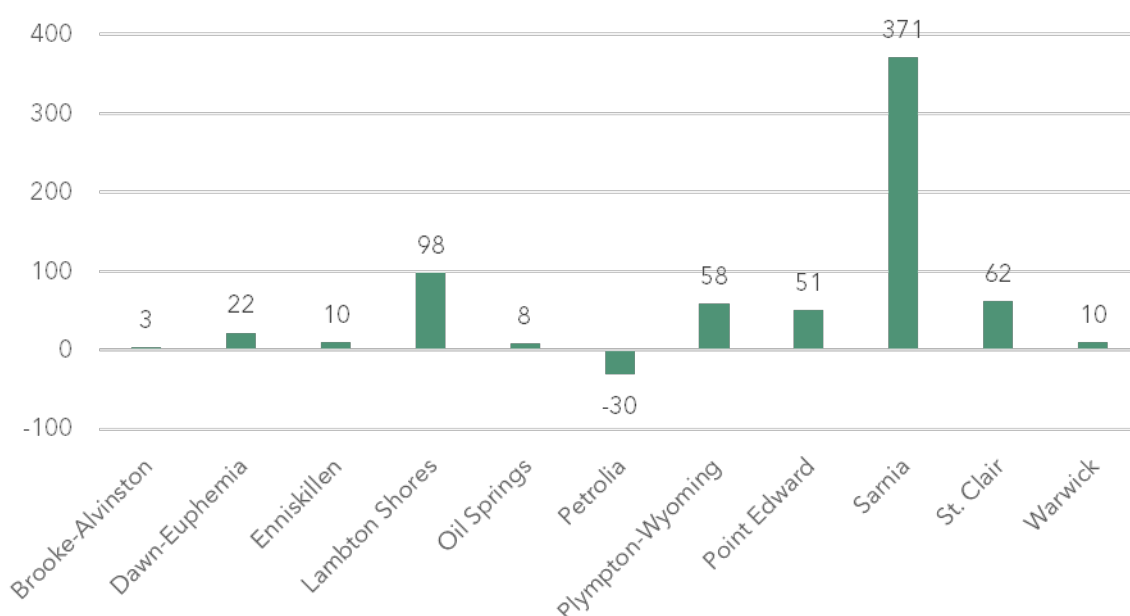
Source: Parcel based on data from metro economics.

Employment Area Employment Growth

Figure 5.2 more specifically details the amount of employment growth anticipated to occur within Employment Areas across each municipality to 2051. As detailed, excepting Petrolia, all municipalities are anticipated to see some employment growth in Employment Area over the forecast period to 2051.

Figure 5.2

Employment Area Growth by Type & Municipality



Source: Parcel based on data from metro economics.

5.2 Employment Area Demand

Based on these forecasts, the potential amount of Employment Area land required to support employment growth was then estimated.

All industrial job growth was estimated to occur on Employment Area land across each municipality. Total job growth for each lower tier municipality to 2051 was adjusted to recognized that a percentage of future Employment Area jobs will continue to be "work from home" positions. Within the industrial sector, work from home positions are largely concentrated in administrative, finance and sales positions where employees have the flexibility to not

be on-site. This adjustment, was based on historical trends by NAICS code from the 2016 Census, as estimates in the 2021 Census were largely overstated as a result of the COVID-19 pandemic. Based on this approach, industrial job growth was reduced by 5% to account for work from home positions.

Industrial job growth was then adjusted based on the assumption that approximately 10% of all job growth will be accommodated through intensification on existing sites. For example, this could be an employer accommodating a larger number of employees within an existing building, or expanding a building onto the underutilized portion of an existing site. This assumption was informed based on our review of underutilized sites in Lambton County and trends across similar geographies.

For the net new jobs estimated to occur on vacant Employment Area lands, we have applied a density assumption of 15 jobs per hectare to determine the net land required support industrial job growth across Lambton County.

Based on this approach, Figure 5.3 details that Lambton County will need 43.1 hectares of designated Employment Area land to meet forecast employment growth to 2051.

Figure 5.3

Employment Area Land Needs, 2021 - 2051

	Adjusted Job Growth (2021- 2051)	Density Assumed (jobs / ha)	Land Required to Accommodate Job Growth (ha)
Brooke-Alvinston	3	15	0.2
Dawn-Euphemia	19	15	1.3
Enniskillen	9	15	0.6
Lambton Shores	84	15	5.6
Oil Springs	7	15	0.5
Petrolia	-26	15	0.0
Plympton-Wyoming	50	15	3.3
Point Edward	44	15	2.9
Sarnia	371	15	24.7
St. Clair	53	15	3.5
Warwick	9	15	0.6
Lambton County Total	621		43.1

Source: Parcel.

5.3 Employment Area Supply

With the support of planning staff from Lambton County, Parcel estimated the supply of industrial lands in Lambton County, and each lower-tier municipality, based on designations in the Lambton County OP. This estimate excludes non-developable lands, including designated Significant Woodlots, Natural Heritage Group A, and lands not designated for industrial uses.

The Sarnia Comprehensive Review identified employment land based on the supply of land across four designations (i.e., lands designated Heavy Industrial, Light Industrial, and Business Park). In total, it identified a total 543.6 gross hectares of Employment Area land to accommodate industrial job growth. As part of the Sarnia Comprehensive Review, 34 hectares of Business Park land were redesignated for Residential uses. This reduced the supply of Employment Area lands to 509.6 gross hectares.

Figure 5.4 summarizes the supply of vacant Industrial lands in each municipality in Lambton County. As shown, there are approximately 3,425 hectares of vacant Industrial lands County-wide. However, it should be noted that lands designated as Petrochemical Area account for approximately three-quarters (76%) of this vacant supply. Excluding the Petrochemical Area lands, the supply of vacant Industrial lands in Lambton County declines to 816 gross hectares.

We note that many municipalities also contain lands designated Mixed Commercial/Industrial. For the purposes, of this Land Needs Assessment, we have excluded these lands from the estimated supply of Employment Area lands, as these lands include commercial businesses as a permitted use. As commercial uses are no longer permitted within Employment Areas in the PPS, 2024, the local municipalities should consider amending their land use designation to align with the permitted uses in the PPS, 2024.

Figure 5.4

Vacant Industrial Land Supply in Lambton County

	Industrial (ha)
Brooke-Alvinston	0
Dawn-Euphemia	0
Enniskillen	0
Lambton Shores	56
Oil Springs	0
Petrolia	164
Plympton-Wyoming	0
Point Edward	0
Petrochemical Area	2,608
Sarnia	510
St. Clair	32
Warwick	55
Lambton County	3,425

Source: Parcel.

See **Appendix D** for Non-Residential Land Supply Mapping by Municipality

5.4 Employment Area Land Needs

Total industrial land supply was then adjusted for long-term vacancy. Specifically, a 10% adjustment was applied recognizing that locational and/or topographical constraints could limit the development of some sites. For consistency with other municipalities in Lambton, this was updated from the Sarnia Comprehensive Review, which applied a 5% long-term vacancy adjustment. Furthermore, land supply estimates were translated into a net land supply by applying a 20% net to gross factor to reflect larger sites requiring space for internal roads, stormwater management and other non-developable areas.

The demand for industrial land was then compared to the supply of industrial land to determine if there exists a shortfall or surplus of lands to accommodate employment growth for each municipality to 2051.

As detailed in Figure 5.5, there is a significant surplus of industrial land within Lambton County (544.7 ha). However, this surplus masks anticipated shortfalls in other municipalities such as Brooke-Alvinston, Dawn-Euphemia, Enniskillen, Oil Springs, Plympton-Wyoming and Point Edward.

It should be noted that shortfall does **not** include the surplus of over 2,600 hectares of petrochemical area; this area – in addition to surpluses in neighbouring municipalities – is expected to accommodate any additional space demand.

For municipalities where a shortfall of industrial lands is identified, it likely will not necessitate a settlement area boundary expansion. Instead, many of these municipalities include vacant land designated as Commercial/Industrial that could accommodate industrial uses. Therefore, these municipalities should consider the redesignation of these lands or change in land use permissions to better align with permitted uses in the PPS, 2024. In the case of Plympton-Wyoming, as there are no vacant Commercial/Industrial lands, the municipality should consider designating some Agricultural lands within the settlement area boundaries for Industrial uses. This would reduce the surplus of Residential lands identified in this Land Needs Assessment.

Figure 5.5

Sufficiency of Employment Area Land Across Lambton County, 2021 – 2051

	Land Required to Accommodate Job Growth (ha)	Land Available to Accommodate Job Growth (ha)	Sufficiency of Land Supply (Surplus / Shortfall) (ha)
Brooke-Alvinston	0.2	0.0	(0.2)
Dawn-Euphemia	1.3	0.0	(1.3)
Enniskillen	0.6	0.0	(0.6)
Lambton Shores	5.6	40.2	34.6
Oil Springs	0.5	0.0	(0.5)
Petrolia	0.0	118.1	118.1
Plympton-Wyoming	3.3	0.0	(3.3)
Point Edward	2.9	0.0	(2.9)
Sarnia	24.7	366.9	342.2
St. Clair	3.5	22.9	19.4
Warwick	0.6	39.5	39.0
Lambton County Total	43.1	587.8	544.7

Source: Parcel.

See **Appendix E** for Employment Area Land Needs by Municipality

6.0

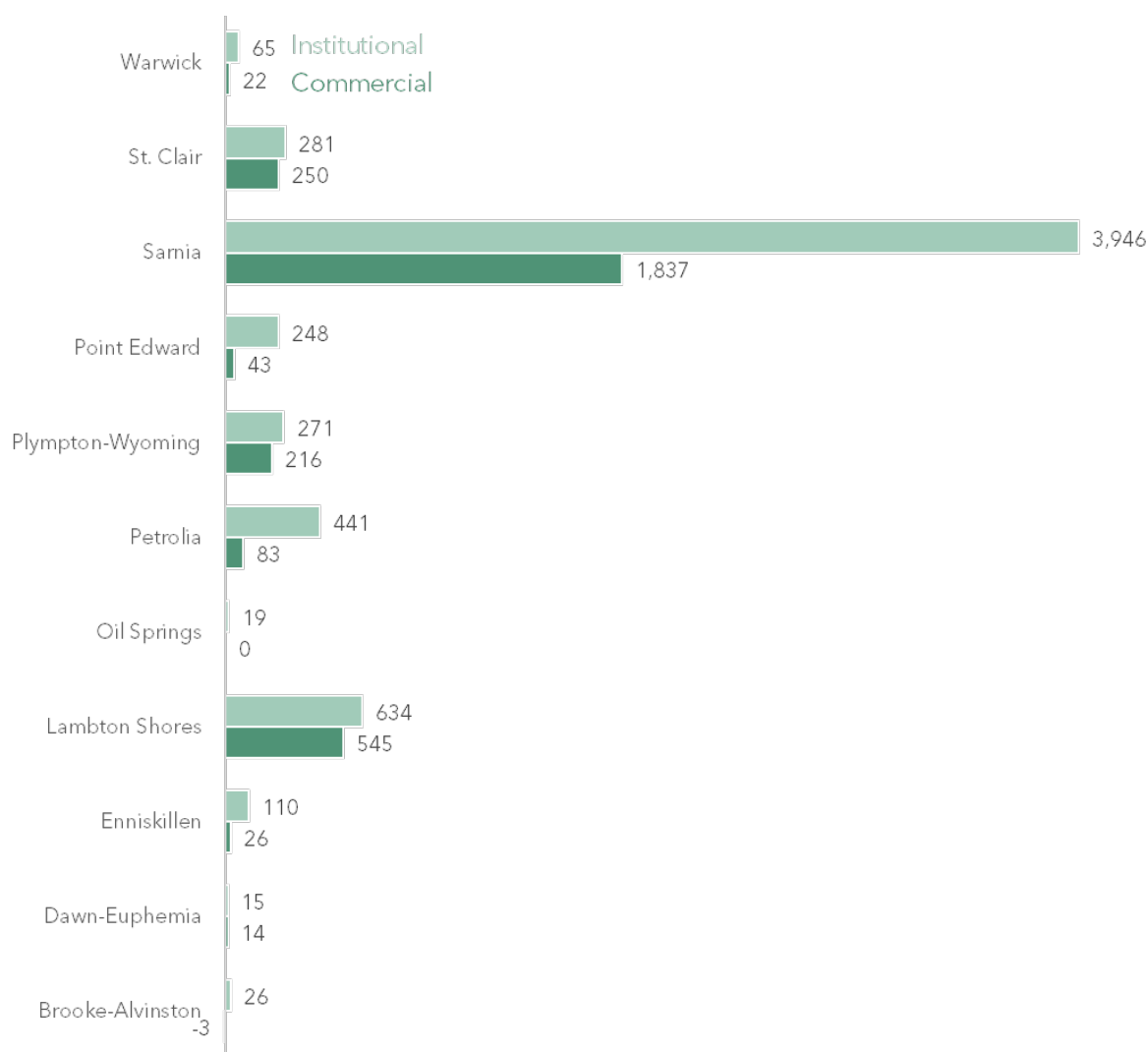
Commercial & Institutional Land Needs Assessment

6.1 Employment Growth

As previously summarized (see Figure 5.1), employment forecasts for Lambton County were translated into forecasts for each lower-tier municipality, by employment category. Consistent with these forecasts, Figure 6.1 details the amount of commercial and institutional jobs forecast across each municipality to 2051.

Figure 6.1

Commercial and Institutional Employment Growth, 2021 - 2051



Source: Parcel based on data from metro economics.

As detailed nearly all municipalities are anticipated to see some growth in commercial and institutional employment over the forecast period to 2051. As Commercial and Institutional jobs are largely population-driven, municipalities that are anticipated to experience significant population growth area also anticipated to experience growth in commercial and institutional jobs. It will be important for these municipalities to have sufficient land to accommodate these jobs to promote the development of complete communities.

6.2 Demand For Commercial & Institutional Land

Commercial and institutional forecasts shown above were used to estimate the potential amount of commercial and institutional land that would be required across Lambton County, and each lower-tier municipality.

Total commercial and institutional job growth for each municipality to 2051 was adjusted recognizing that a percentage of future jobs will be “work from home” jobs. This adjustment was based on historical trends by NAICS code from the 2016 Census, as estimates in the 2021 Census were largely overstated as a result of the COVID-19 pandemic. Based on previous work from home trends, it is estimated that 15% of future commercial jobs will be work from home jobs, while 5% of institutional jobs are anticipated to be work from home jobs and will not generate a need for land.

Commercial and institutional job growth was then adjusted based on the assumption that 10% of new commercial and institutional jobs will take the form of intensification (e.g. adding additional staff to a retail store, building an additional shop or office on an underutilized site, etc.). This assumption was informed based on our review of underutilized lands in Lambton County and trends across similar geographies. In-line with other comparable geographies, an employment density assumption of 54 jobs per gross hectare was applied to Commercial jobs, while a density of 31 jobs per hectare was applied to Institutional jobs to determine the potential land required to support anticipated job growth to 2051.

Based on this approach, Figure 6.2 details that Lambton County will need 43.0 gross hectares of land to accommodate commercial job growth and 167.0 hectares of land to support institutional job growth to 2051, for a combined 210.0 hectares of vacant land.

Figure 6.2

Commercial & Institutional Land Needs, 2021 – 2051

	Adjusted Commercial Job Growth (2021- 2051)	Density Assumed (jobs / ha)	Land Required to Accommodate Commercial Job Growth (ha)	Adjusted Institutional Job Growth (2021- 2051)	Density Assumed (jobs / ha)	Land Required to Accommodate Institutional Job Growth (ha)
Brooke-Alvinston	-2	54	0.0	22	31	0.7
Dawn-Euphemia	11	54	0.2	13	31	0.4
Enniskillen	20	54	0.4	94	31	3.0
Lambton Shores	417	54	7.7	542	31	17.5
Oil Springs	0	54	0.0	16	31	0.5
Petrolia	63	54	1.2	377	31	12.2
Plympton-Wyoming	165	54	3.1	232	31	7.5
Point Edward	33	54	0.6	212	31	6.8
Sarnia	1,837	54	26.0	3,946	31	108.8
St. Clair	191	54	3.5	240	31	7.8
Warwick	17	54	0.3	56	31	1.8
Lambton County Total	2,752		43.0	5,750		167.0

Source: Parcel.

6.3 Commercial & Institutional Supply

With the support of planning staff from Lambton County, Parcel estimated the supply of commercial and institutional lands in Lambton County, and each lower-tier municipality, based on designations in the Lambton County OP. This estimate excludes non-developable lands designated Significant Woodlots, Natural Heritage Group A.

Based on this approach, there is approximately 50 hectares of commercial and institutional lands (including 47 hectares of commercial lands and 3 hectares of institutional lands) across Lambton County. Due to a surplus of Industrial lands within Lambton County, as identified previously, lands designated Mixed Commercial / Industrial lands have been included as part of the commercial supply for this Land Needs Assessment. Including lands designated Mixed Commercial / Industrial, or some 213 hectares of land, the total vacant supply of commercial and institutional lands increases to approximately 263.2 hectares as detailed in Figure 6.3.

As detailed, only Lambton Shores and Point Edward have vacant institutional lands, totaling to just 3.2 hectares. That said, it should be noted that a portion of institutional jobs can be accommodated on Commercial land and in some cases (i.e. schools), Residential lands. Notably, as part of Bill 17, *Protect Ontario by Building Faster and*

Smarter Act, 2025, new policy stipulates that elementary and secondary schools can be developed on urban residential land.

Figure 6.3 excludes vacant lands in Sarnia, as this information was not available in the Sarnia Comprehensive Review. Therefore, additional investigate is required to determine the amount of vacant Commercial and Institutional land that is available in Sarnia to accommodate growth to 2051.

Figure 6.3

Commercial, Institutional, and Mixed Commercial Industrial Land Supply

	Commercial (ha)	Institutional (ha)	Mixed Commercial / Industrial (ha)	Total
Brooke-Alvinston	1.2	0.0	27.5	28.7
Dawn-Euphemia	0.0	0.0	0.0	0.0
Enniskillen	0.0	0.0	62.1	62.1
Lambton Shores	21.3	2.6	17.1	41.0
Oil Springs	1.2	0.0	4.0	5.2
Petrolia	17.4	0.0	45.0	62.4
Plympton-Wyoming	0.2	0.0	0.0	0.2
Point Edward	0.4	0.6	1.3	2.3
Sarnia	n.a.	n.a.	n.a.	n.a.
St. Clair	5.2	0.0	0.0	5.2
Warwick	0.0	0.0	56.2	56.2
Lambton County Total	46.8	3.2	213.1	263.2

Note: Excludes vacant commercial and institutional lands in Sarnia, as this was not identified as part of the Sarnia Comprehensive Review.

Source: Parcel.

6.4 Commercial & Institutional Land Needs

The total supply of vacant Commercial and Institutional lands identified across Lambton County and each lower-tier municipality were then translated to a net land needs estimate using a 20% net to gross factor, recognizing that a

portion of lands will be used to accommodate infrastructure and other ancillary uses. Total demand was then compared to the County's existing supply to determine if there is a shortfall or surplus of lands to accommodate employment growth, across Lambton County and each municipality more specifically.

Figure 6.4 details that there is **generally a surplus of commercial land throughout Lambton County**. However, there is a shortfall of commercial land identified in Dawn-Euphemia and Plympton-Wyoming. Comparatively, Figure 6.4 details that **there are consistent shortfalls of institutional lands in all municipalities**.

As the supply of Commercial and Institutional land was not available in the Sarnia Comprehensive Review, additional investigation is required to ensure that the available vacant land supply is sufficient to accommodate forecast growth.

Figure 6.4

Sufficiency of Commercial & Institutional Lands to Support Growth, 2021 - 2051

	Land Required to Accommodate Commercial Job Growth (ha)	Land Available to Accommodate Commercial Job Growth (ha)	Sufficiency of Commercial Land Supply (Surplus / Shortfall) (ha)	Land Required to Accommodate Institutional Job Growth (ha)	Land Available to Accommodate Institutional Job Growth (ha)	Sufficiency of Institutional Land Supply (Surplus / Shortfall) (ha)
Brooke-Alvinston	0.0	22.9	22.9	0.7	0	(0.7)
Dawn-Euphemia	0.2	0.0	(0.2)	0.4	0	(0.4)
Enniskillen	0.4	49.7	49.3	3.0	0	(3.0)
Lambton Shores	7.7	30.7	23.0	17.5	2.1	(15.4)
Oil Springs	0.0	4.2	4.2	0.5	0.0	(0.5)
Petrolia	1.2	49.9	48.7	12.2	0.0	(12.2)
Plympton-Wyoming	3.1	0.1	(2.9)	7.5	0.0	(7.5)
Point Edward	0.6	1.4	0.7	6.8	0.5	(6.4)
Sarnia	26.0	-	-	-	-	-
St. Clair	3.5	4.2	0.6	7.8	0	(7.8)
Warwick	0.3	45.0	44.6	1.8	0	(1.8)
Total	43.0		191.0	58		(55.6)

Source: Parcel.

Given that there are some institutional jobs that can be accommodated on commercial lands, these estimates have also been aggregated to provide a broader understanding of the true surplus or shortfall of land.

As seen in Figure 6.5 when aggregated, while Dawn-Euphemia, Plympton-Wyoming, Point Edward and St. Clair area anticipated to have a shortfall of land to serve anticipated commercial and institutional needs, Lambton County

(excluding Sarnia) is estimated to have a total surplus of approximately 135.4 hectares of commercial and institutional land.

Figure 6.5

Sufficiency of Commercial & Institutional Lands to Support Growth, 2021 - 2051

	Commercial Land Need (Ha)	Institutional Land Need (Ha)	Commercial / Institutional Land Need (Ha)
Brooke-Alvinston	22.9	(0.7)	22.2
Dawn-Euphemia	(0.2)	(0.4)	(0.6)
Enniskillen	49.3	(3.0)	46.3
Lambton Shores	23.0	(15.4)	7.6
Oil Springs	4.2	(0.5)	3.7
Petrolia	48.7	(12.2)	36.5
Plympton-Wyoming	(2.9)	(7.5)	(10.4)
Point Edward	0.7	(6.4)	(5.6)
Sarnia			-
St. Clair	0.6	(7.8)	(7.1)
Warwick	44.6	(1.8)	42.9
Lambton County	191.0	(55.6)	135.4

Source: Parcel.

7.0

Summary of Land Needs

Parcel Economics Inc. ("Parcel") has been retained by Lambton County ("the County") alongside NPG Planning Solutions ("NPG") and metro economics to prepare an Official Plan Review of the County of Lambton Official Plan, October 1, 2020 Office Consolidation ("Lambton County OP").

The Lambton County OP was last updated in 2016, adopted by Council of the County of Lambton in September 2017 and approved with modifications by the Ministry of Municipal Affairs in March 2018. Therefore, the Lambton County OP also requires an update to conform with the requirements of the Planning Act and also conform with the Provincial Planning Statement ("PPS"), 2024, which came into effect on October 20, 2024 and replaced the Provincial Planning Statement, 2014, which was in effect at the time of the last official plan review.

Located in Southwestern Ontario, the County is comprised of 11 lower-tier municipalities, including several large Towns and the City of Sarnia. Many of these municipalities are experiencing significant growth in comparison to historical trends. Therefore, it is important to ensure that the supply of land for residential, industrial, commercial and institutional uses is aligned to recent growth trends.

This Official Plan Review provides the opportunity for the County to align with updated legislation while also providing the opportunity for land supply estimates to be updated to align with heightened growth projections.

The purpose of this Land Needs Assessment is to determine whether there is sufficient land within Lambton County's Urban Centres and Urban Settlements to accommodate updated population and employment growth forecasts for Lambton County, and each lower-tier municipality, to 2051.

Population, Household and Employment Growth Forecasts

metro economics was engaged as part of the Lambton County OP to prepare population, household and employment forecasts for Lambton County and each lower-tier municipality. The forecasts prepared by metro economics align with the 2051 population forecast for Lambton County that are contained in the Ministry of Finance October 2024 Ontario Population Projections and were further extended to the year 2056.

Based on these forecasts, Lambton County is anticipated to grow to a population of 162,400 persons by 2051, an increase of 31,400 persons in comparison to the population that existed in 2021. Based on headship rates from the 2021 Census of Canada, Lambton County is anticipated to reach 66,782 households in 2051, growth of 12,362 households in comparison to 2021. In addition to household growth, some municipalities are anticipated to experience demand for seasonal residences that will increase the need for housing and land in these municipalities.

metroeconomics has also prepared employment forecasts based on their standard projection system that anticipates the need for export-related jobs and population-related jobs. Based on these forecasts, employment in

Lambton County is anticipated to reach 53,100 jobs by 2051, growth of about 8,800 jobs in comparison to 2021. The majority of this employment growth is anticipated to be in population-related sectors of the economy, including commercial and institutional jobs.

Growth Allocations

The allocation of population and employment to each local municipality has considered the reality that population and household growth typically occurs when and where economic base jobs or commuting opportunities are growing or when people are choosing to retire in the area. Based on these local dynamics, metro economics has allocated employment, as well as population by age group to the 11 municipalities that make up Lambton County.

Based on these allocations, Sarnia is anticipated to account for half of the population growth within the County and 68% of the employment growth. Within Lambton County, Lambton Shores, Plympton-Wyoming and St. Clair are also anticipated to account for a sizable share of both population and employment growth to 2051.

Residential Land Needs

In determining Residential land needs, Parcel has undertaken a review of the supply of vacant Residential lands available in the County (both intensification and greenfield). Based on the supply of vacant intensification lands, we have identified intensification targets in each municipality. In Sarnia, we have relied on the intensification target identified in the in-force Official Plan (45%). This results in County-wide intensification rate of 27% between 2021 and 2051 and exceeds the target identification rate identified in the Lambton County OP.

Based on household forecasts, the assumed intensification rate and the known supply of units, there is anticipated to be a surplus of residential units in the County to accommodate growth to 2051. However, this masks local imbalances. While there are some municipalities that are anticipated to have a large surplus of residential units to accommodate growth, municipalities such as Sarnia and St. Clair are anticipated to have a shortfall of housing to accommodate housing demand to 2051. Furthermore, the large surplus of residential units in Plympton-Wyoming is associated with the large supply of lands designated as Agricultural within the boundaries of the Urban Centre and Urban Settlements, specifically the Lakeshore Development Areas. If the owners of these lands do not have a desire to develop their lands with residential uses due to ongoing farm operations it could result in imbalances in the housing market.

Overall, Lambton County could require an additional 228.7 gross hectares of additional Residential land to accommodate growth over this period. Based on the methodology and supply identified above, our analysis identified that additional residential lands will be required in Enniskillen, Sarnia and St. Clair. It is notable that in Sarnia, as part of the Sarnia Comprehensive Review, 34 hectares of Business Park lands were redesignated for Residential uses. Therefore, the “net” additional need for Residential lands in Sarnia is reduced to 110.4 hectares.

Employment Area Land Needs

There is forecast to be a significant surplus of industrial land within Lambton County (544.7 ha). However, this surplus masks anticipated shortfalls in other municipalities such as Brooke-Alvinston, Dawn-Euphemia, Enniskillen, Oil Springs, Plympton-Wyoming and Point Edward.

It should be noted that shortfall does not include the surplus of over 2,600 hectares of petrochemical area; this area – in addition to surpluses in neighbouring municipalities – is expected to accommodate any additional space demand.

For municipalities where a shortfall of industrial lands is identified, it likely will not necessitate a settlement area boundary expansion. Instead, many of these municipalities include vacant land designated as Commercial/Industrial that could accommodate industrial uses. Therefore, these municipalities should consider the redesignation of these lands or change in land use permissions to better align with permitted uses in the PPS, 2024. In the case of Plympton-Wyoming, as there are no vacant Commercial/Industrial lands, the municipality should consider designating some Agricultural lands within the settlement area boundaries for Industrial uses. This would reduce the surplus of Residential lands identified in this Land Needs Assessment.

Commercial and Institutional Land Needs

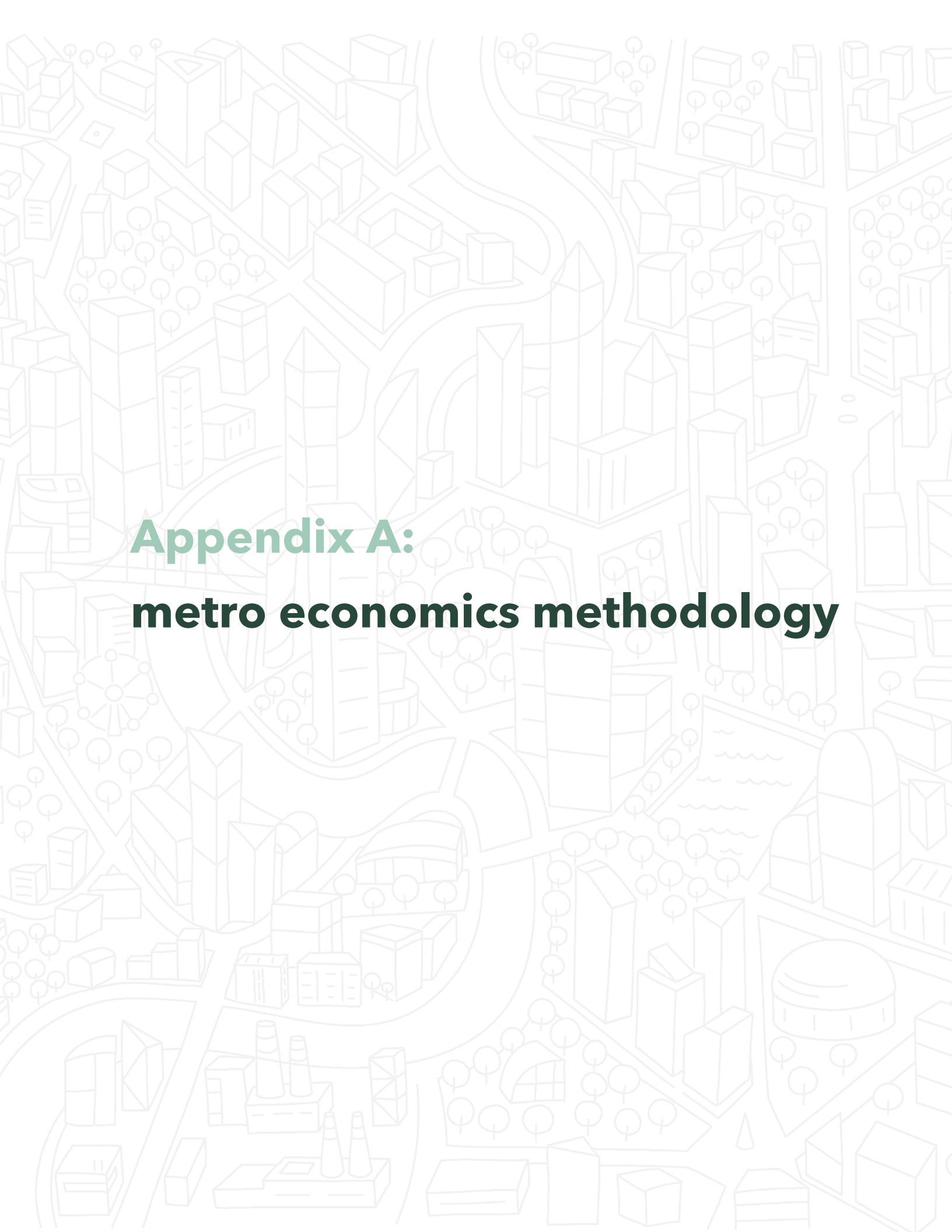
Based on commercial and institutional employment forecasts, there is generally a surplus of commercial land throughout Lambton County. However, there is a shortfall of commercial land identified in Dawn-Euphemia and Plympton-Wyoming. Comparatively, there are consistent shortfalls of institutional lands in all municipalities.

As the supply of Commercial and Institutional land was not available in the Sarnia Comprehensive Review, additional investigation is required to ensure that the available vacant land supply is sufficient to accommodate forecast growth.

Summary

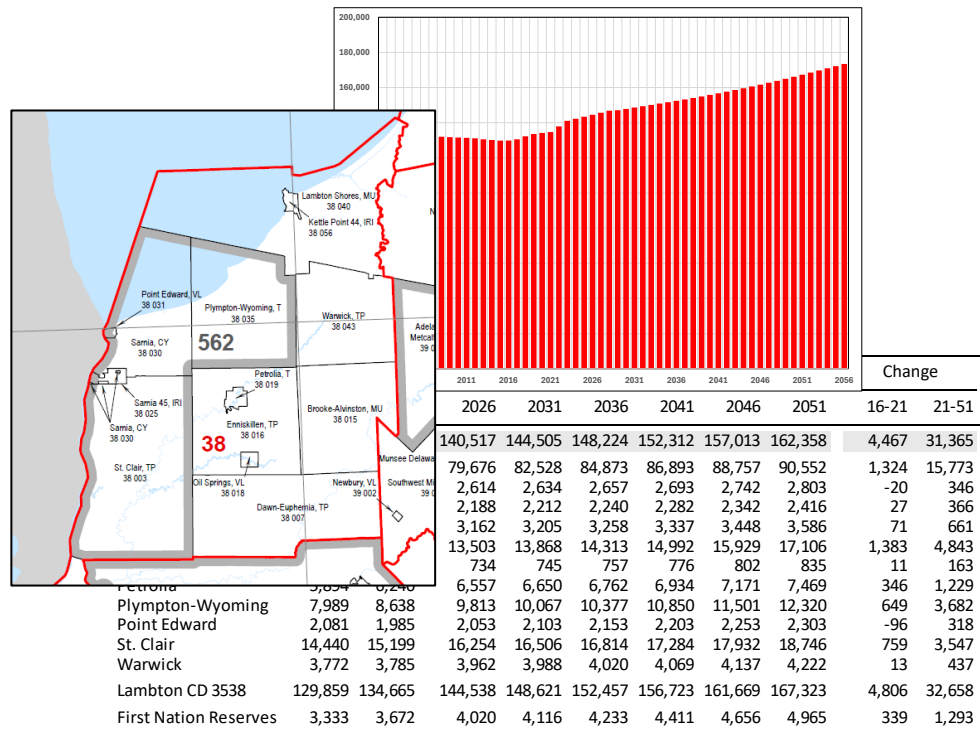
At this time, only Sarnia and St. Clair are anticipated to require a settlement area boundary expansion to accommodate Residential land needs. Enniskillen, which includes the Urban Settlement of Oil City, is also identified as needing an additional 11.2 hectares of Residential land to accommodate growth. However, further investigation is required to determine if servicing capacity is available to accommodate this growth.

There are some municipalities where there is an identified shortfall in Industrial, Commercial and Institutional lands, these shortfalls can be addressed through the redesignation of lands within the existing settlement area, rather than through a settlement area boundary expansion.



Appendix A: **metro economics methodology**

Lambton County Projections by Municipality



Prepared for



Prepared by



September 2025

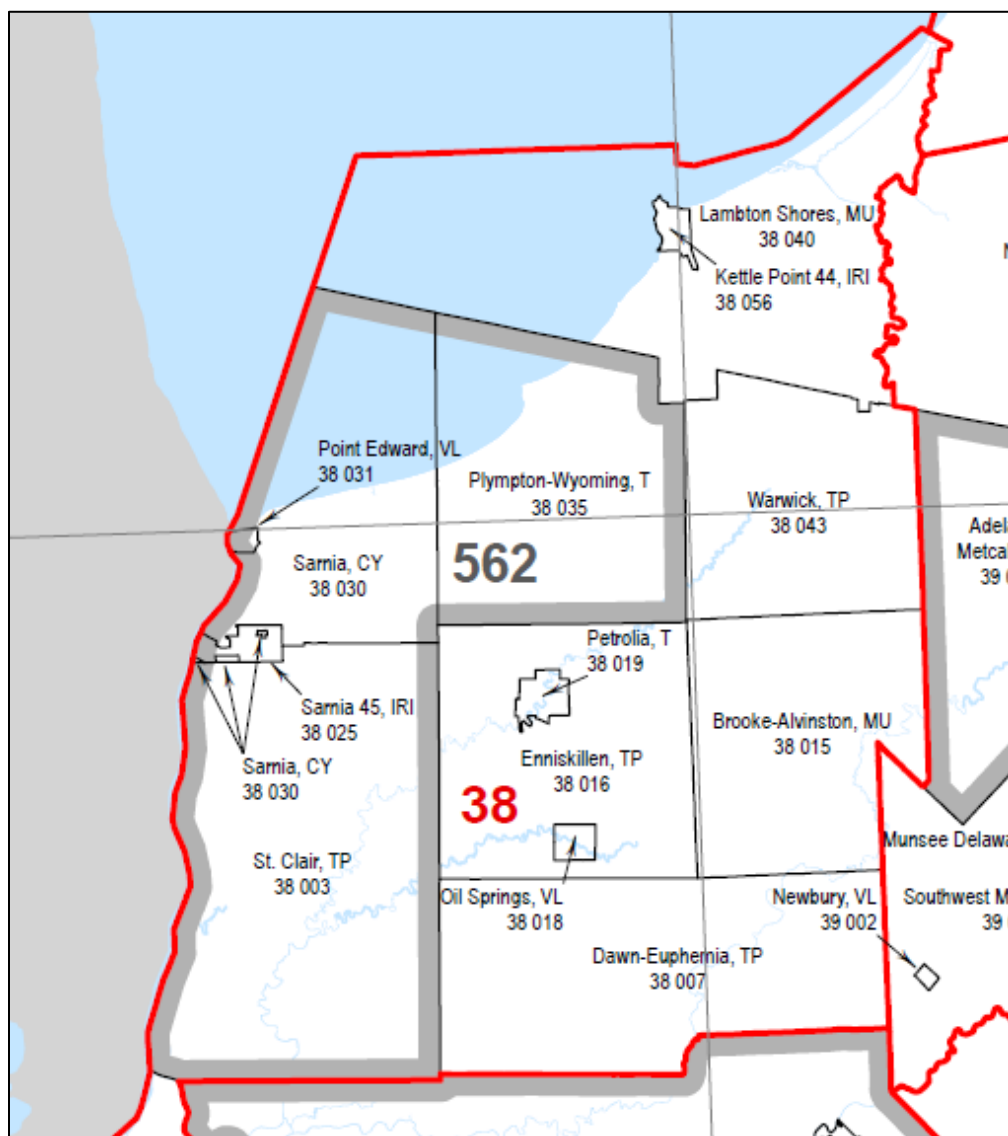
Lambton County Projections by Municipality

Introduction

This report was prepared by *metroeconomics* for NPG in support of an assignment they are carrying out on behalf of Lambton County. *metroeconomics'* role here was to develop detailed population by age and gender, employment by industry by place of work and dwellings by structural type to 2051 for each of the constituent municipalities (census sub-divisions or CSDs using census terminology) that define Lambton County.

Exhibit 1

Map of Census Division 3538's Constituent Municipalities



Source: Statistics Canada

Politically, Lambton County consists of 11 municipalities:

- Brooke-Alvinston
- Dawn-Euphemia
- Enniskillen
- Lambton Shores
- Oil Springs
- Petrolia
- Plympton-Wyoming
- Point Edward
- Sarnia
- St. Clair
- Warwick

Statistically (for census purposes) Lambton County includes the 11 municipalities above plus three First Nations Reserves (Kettle Point 44, Sarnia 45, and Walpole Island 46). Statistics Canada refers to this larger area of 14 CSDs as Census Division 3538 (Lambton). The map above illustrates CD 3538 (outlined in red) and its 11 constituent municipalities and 3 First Nations Reserves.

The Chosen Projections Approach

metroeconomics would typically approach an assignment such as this as follows:

- Based on historical trends and relative endowments of employment by industry within the CD we would assess the potential for employment growth in those industries that define its economic base.
- Using our sub-provincial projections system – which links future population growth to economic base job growth potential – we would develop projections of the future population by age and gender and dwelling requirements by structural type for CD 3538 (Lambton).
- Based on commuter data and historical population and employment growth within CD 3538 by municipality we would allocate the projections for the population, jobs and dwellings for CD 3538 as a whole into preliminary projections for each constituent CSD.

This approach was described by *metroeconomics* at a meeting in November 2024 to key consultants on this assignment from NPG and Parcel Economics. At that meeting it was decided the projections for CD 3538 should be driven, instead, by the most recent Ontario Ministry of Finance population projections for CD 3538. The projections provided here, therefore, are consistent with the requirements of the Provincial Planning Statement (2024).

Following on that decision, *metroeconomics* transformed its sub-provincial system to develop projections for each of Lambton's 11 municipalities linked to a projection for all of CD 3538.

The Ontario Ministry of Finance develops projections for all 60 of the CDs in the province but it does not provide projections for the populations of the CSDs that make up each CD.

The Lambton County Projection System

For this assignment *metroeconomics* developed a projection framework wherein each County municipality has been modeled and projected separately. Each municipal model includes annual historical data from 2016 to 2021 (or to 2023 where available) and annual projected data to 2051. Each municipal model includes history and projections for:

- Population by single-year age and gender
- Households by age of household head (major age groups)
- Labour market activity of residents (employed, unemployed) (EPOR)
- Employment by place of work by industry (EPOW)
- Dwellings by age of head by structural type (singles, semis, rows, etc.)

Exhibit 2 illustrates the projected path for Lambton's total population to 2051 against the backdrop of trends since 2001. According to Statistics Canada, between 2001 and 2021 CD 3538's (Lambton's) population grew by just 1,847 over 20 years. Recent StatsCan data indicate Lambton's population grew by more than twice that number – by 6,413 – in just 2 years. The Ontario Ministry of Finance projects steady growth in Lambton's population is on the horizon.

Exhibits 3, 4 and 5 tabulate the projected populations, dwellings and employment by place of work of Lambton County by individual CSD every fifth year over the span from 2016 to 2051.

In 2021 *metroeconomics* had developed projections for the City of Sarnia in support of an assignment then being carried out for the City by *urbanMetrics*. The projection for Sarnia's population developed at that time formed the basis for the population projection for Sarnia adopted here. The allocations of the projected populations of the remaining municipalities within Lambton were established through consideration of the shares each achieved in recent years and on the collective knowledge of the consulting staff regarding known preferences for, and known abilities to accommodate, growth in the future. The allocations in Exhibits 3, 4 and 5 were created as a starting point for consultations with stakeholders throughout the County.

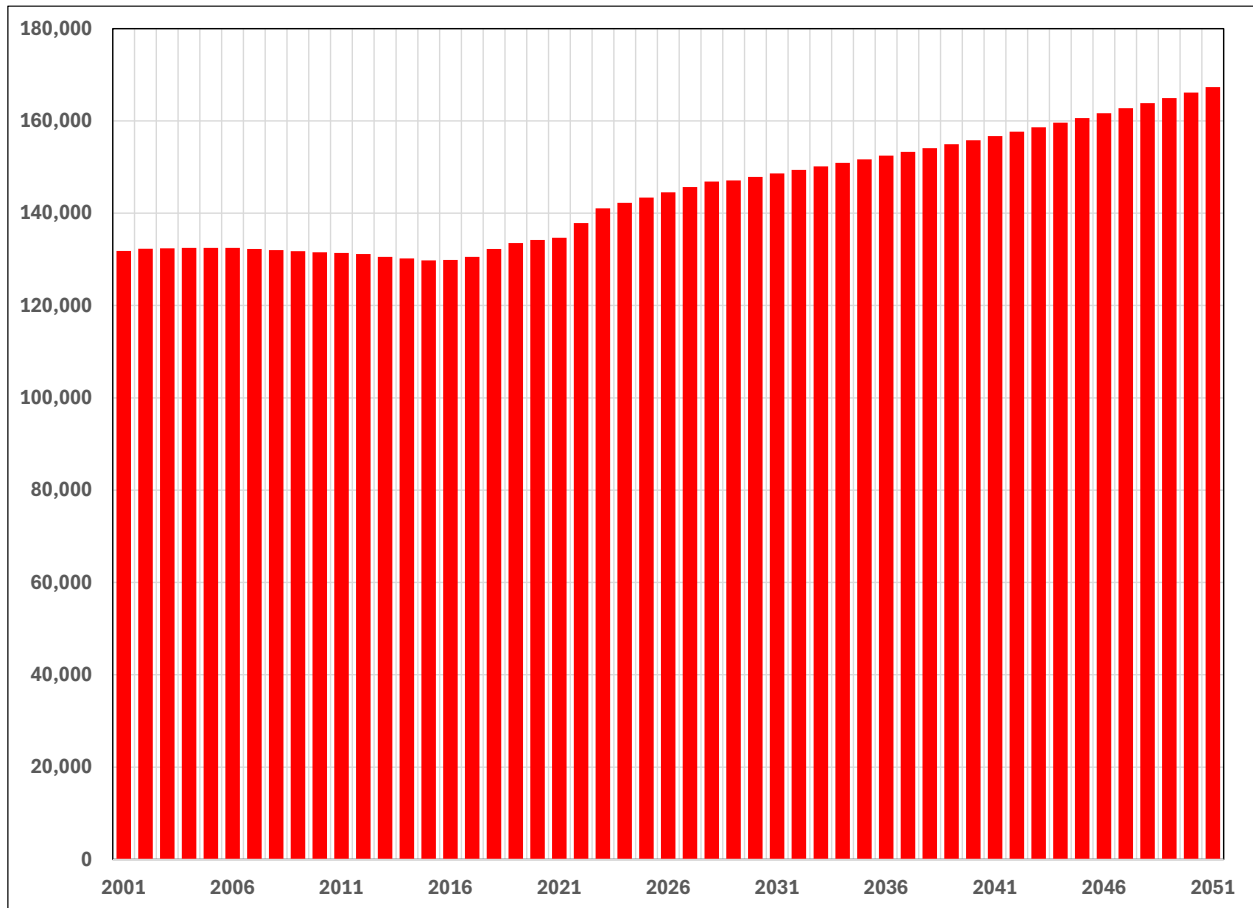
Tom McCormack



905-466-0454

tom@metroeconomics.ca

Exhibit 2
Population of Lambton (CD 3538)
Actual 2001 to 2023 Projected 2024 to 2051



Source: Statistics Canada and *metroeconomics*

Exhibit 3**Population of Lambton County by Constituent Census Sub-Division (CSD)
Actual 2016 and 2021, Projected 2026 to 2051**

	Actual		Projected						Change	
	2016	2021	2026	2031	2036	2041	2046	2051	16-21	21-51
Lambton County	126,526	130,993	140,517	144,505	148,224	152,312	157,013	162,358	4,467	31,365
Sarnia	73,455	74,779	79,676	82,528	84,873	86,893	88,757	90,552	1,324	15,773
Brooke-Alvinston	2,477	2,457	2,614	2,634	2,657	2,693	2,742	2,803	-20	346
Dawn-Euphemia	2,023	2,050	2,188	2,212	2,240	2,282	2,342	2,416	27	366
Enniskillen	2,854	2,925	3,162	3,205	3,258	3,337	3,448	3,586	71	661
Lambton Shores	10,880	12,263	13,503	13,868	14,313	14,992	15,929	17,106	1,383	4,843
Oil Springs	661	672	734	745	757	776	802	835	11	163
Petrolia	5,894	6,240	6,557	6,650	6,762	6,934	7,171	7,469	346	1,229
Plympton-Wyoming	7,989	8,638	9,813	10,067	10,377	10,850	11,501	12,320	649	3,682
Point Edward	2,081	1,985	2,053	2,103	2,153	2,203	2,253	2,303	-96	318
St. Clair	14,440	15,199	16,254	16,506	16,814	17,284	17,932	18,746	759	3,547
Warwick	3,772	3,785	3,962	3,988	4,020	4,069	4,137	4,222	13	437
Lambton CD 3538	129,859	134,665	144,538	148,621	152,457	156,723	161,669	167,323	4,806	32,658
First Nation Reserves	3,333	3,672	4,020	4,116	4,233	4,411	4,656	4,965	339	1,293

Source: Statistics Canada and *metroeconomics***Exhibit 4****Dwellings of Lambton County by Constituent Census Sub-Division (CSD)
Actual 2016 and 2021, Projected 2026 to 2051**

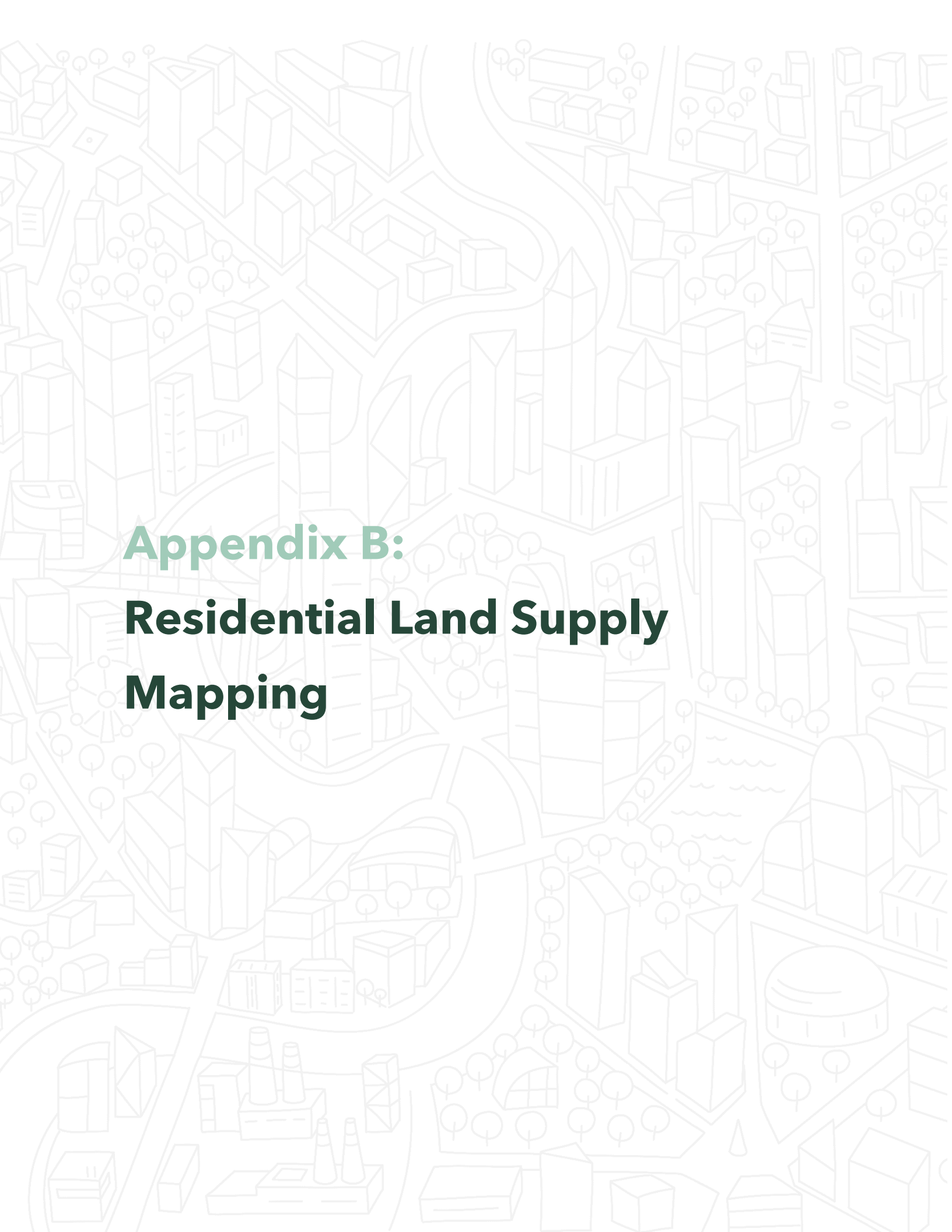
	Actual		Projected						Change	
	2016	2021	2026	2031	2036	2041	2046	2051	16-21	21-51
Lambton County	53,125	54,250	58,255	59,880	61,403	62,772	64,530	66,594	1,125	12,344
Sarnia	31,905	32,190	34,367	35,412	36,357	37,065	37,846	38,733	285	6,543
Brooke-Alvinston	985	875	947	988	1,025	1,051	1,076	1,107	-110	232
Dawn-Euphemia	775	750	813	838	844	856	886	916	-25	166
Enniskillen	1,060	1,040	1,111	1,135	1,163	1,195	1,245	1,291	-20	251
Lambton Shores	4,775	5,250	5,692	5,793	5,870	6,009	6,229	6,548	475	1,298
Oil Springs	260	310	341	356	361	367	373	399	50	89
Petrolia	2,255	2,450	2,582	2,625	2,693	2,754	2,865	2,991	195	541
Plympton-Wyoming	3,050	3,155	3,622	3,772	3,912	4,082	4,335	4,600	105	1,445
Point Edward	950	920	960	963	969	963	961	964	-30	44
St. Clair	5,745	5,985	6,421	6,567	6,749	6,936	7,171	7,469	240	1,484
Warwick	1,365	1,325	1,398	1,431	1,460	1,495	1,543	1,577	-40	252
Lambton CD 3538	54,500	55,210	61,490	63,167	64,784	66,333	68,347	70,683	710	15,473

Source: Statistics Canada and *metroeconomics*

Exhibit 5**Employed by Place of Work of Lambton County by Constituent Census Sub-Division (CSD)
Actual 2016 and 2021, Projected 2026 to 2051**

	Actual		Projected						Change	
	2016	2021	2026	2031	2036	2041	2046	2051	16-21	21-51
Lambton County	47,395	44,320	47,082	48,101	49,034	50,221	51,677	53,120	-3,075	8,800
Sarnia	29,020	26,035	27,649	28,573	29,385	30,264	31,200	32,026	-2,985	5,991
Brooke-Alvinston	585	560	586	567	548	531	518	505	-25	-55
Dawn-Euphemia	515	500	539	526	511	497	485	475	-15	-25
Enniskillen	695	720	775	764	755	751	756	764	25	44
Lambton Shores	3,470	3,935	4,240	4,293	4,370	4,526	4,763	5,050	465	1,115
Oil Springs	65	70	79	81	84	87	92	97	5	27
Petrolia	3,055	2,870	2,997	3,028	3,064	3,128	3,222	3,329	-185	459
Plympton-Wyoming	1,640	1,645	1,810	1,828	1,854	1,909	1,995	2,100	5	455
Point Edward	2,030	1,530	1,601	1,646	1,693	1,750	1,812	1,869	-500	339
St. Clair	5,005	5,310	5,619	5,620	5,612	5,628	5,684	5,754	305	444
Warwick	1,315	1,145	1,187	1,174	1,160	1,152	1,150	1,150	-170	5
Lambton CD 3538	49,085	45,255	48,003	48,916	49,796	51,022	52,603	54,239	-3,830	8,984

Source: Statistics Canada and *metroeconomics*



Appendix B: **Residential Land Supply** **Mapping**

Figure B- 1

Alvinston Residential Supply Map

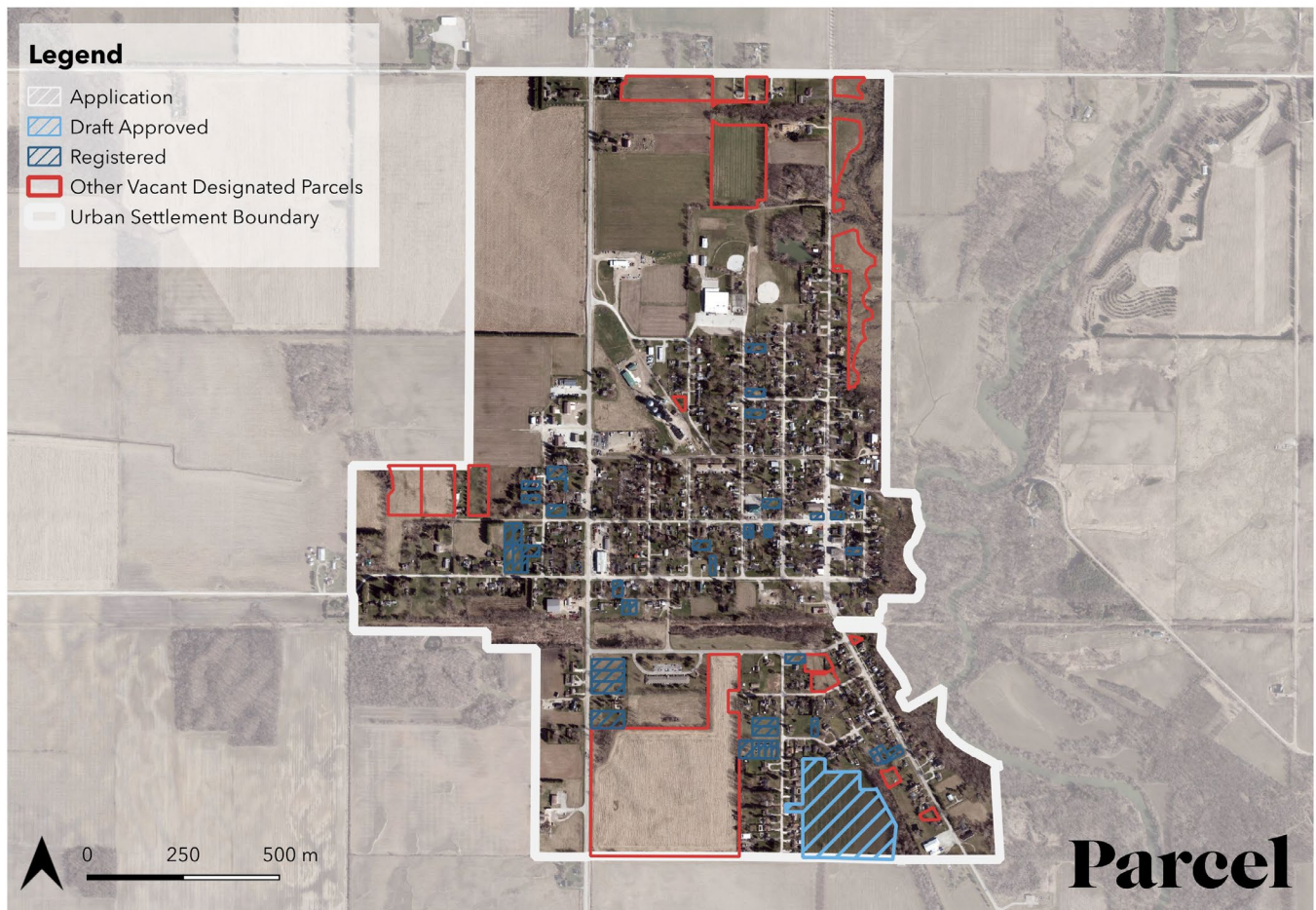


Figure B- 2
Oil City Residential Supply Map

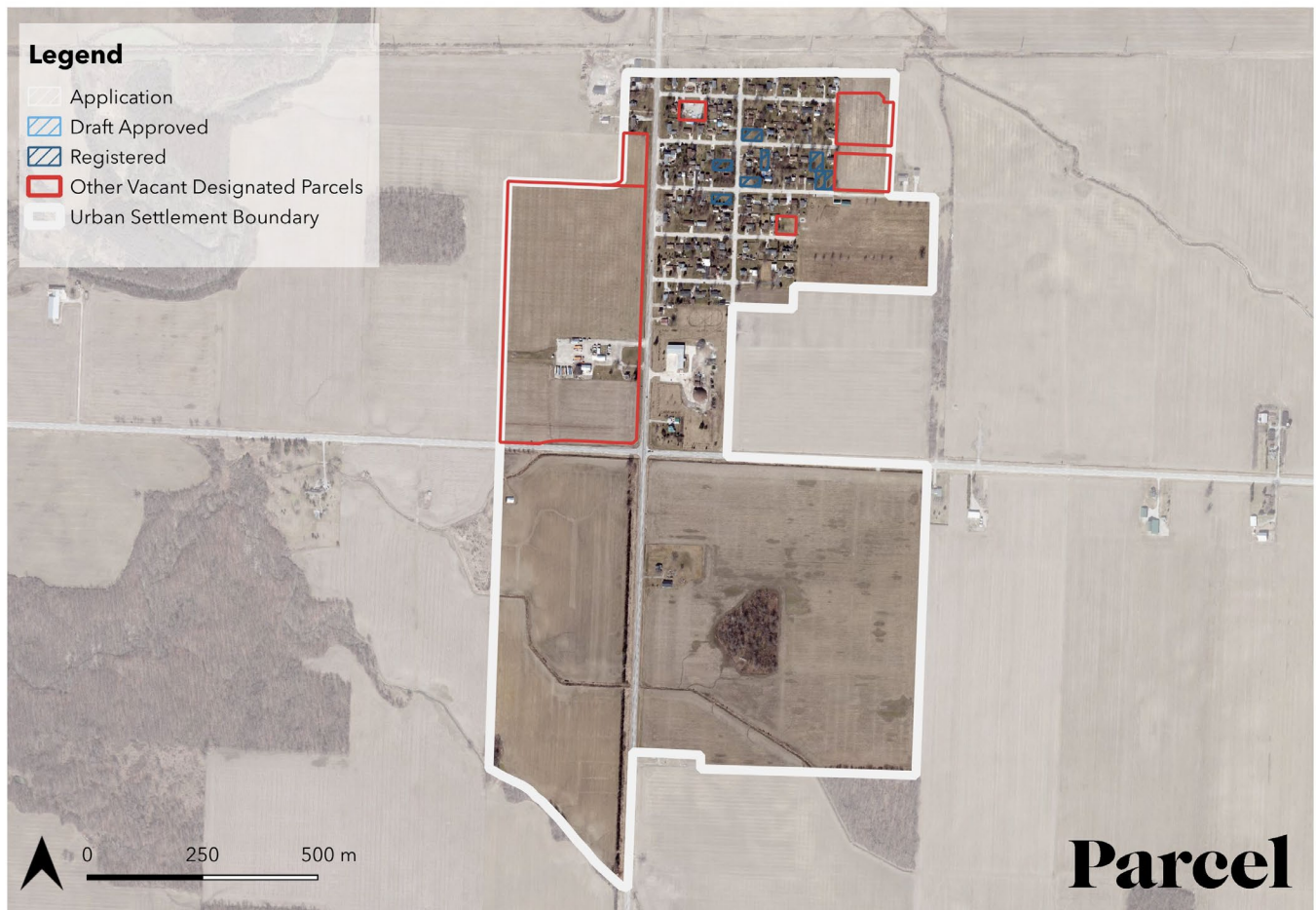


Figure B- 3

Forest Residential Supply Map

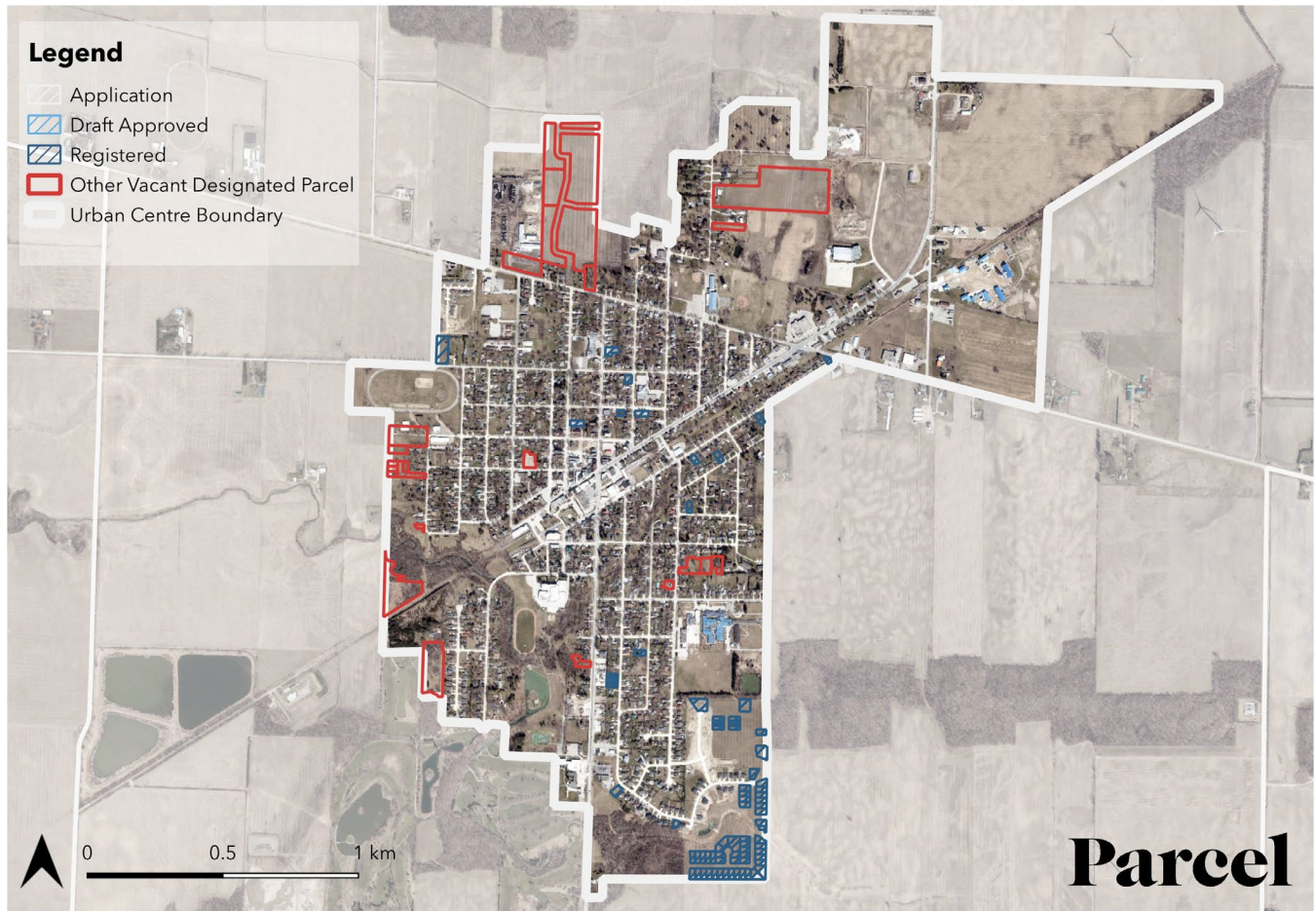


Figure B- 4
Grand Bend Residential Supply Map



Figure B- 5
Highway 21 Residential Supply Map



Figure B- 6

Ipperwash Residential Supply Map



Figure B- 7
Port Franks Residential Supply Map



Figure B- 8

Theford Residential Supply Map

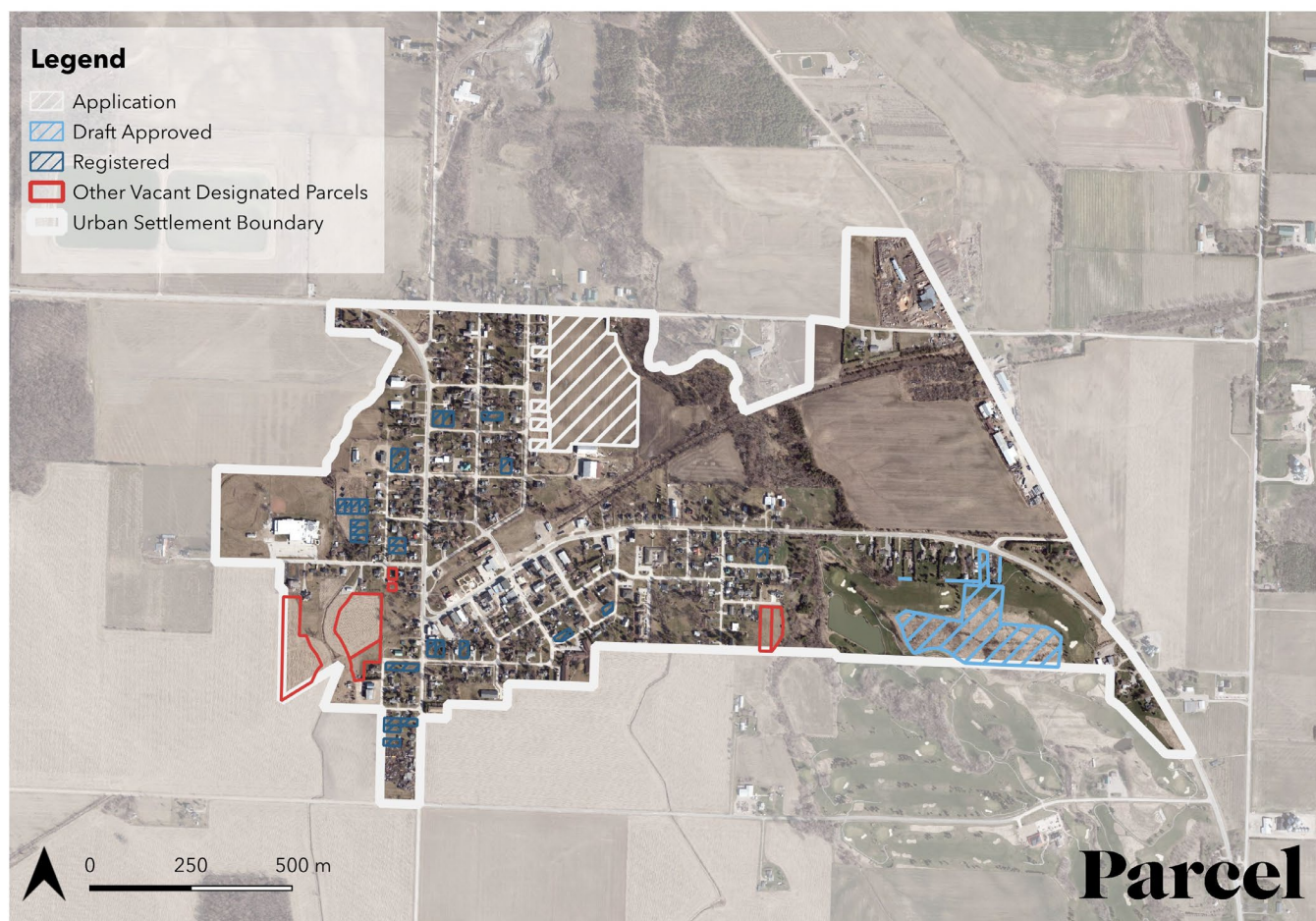


Figure B- 9
Oil Springs Residential Supply Map

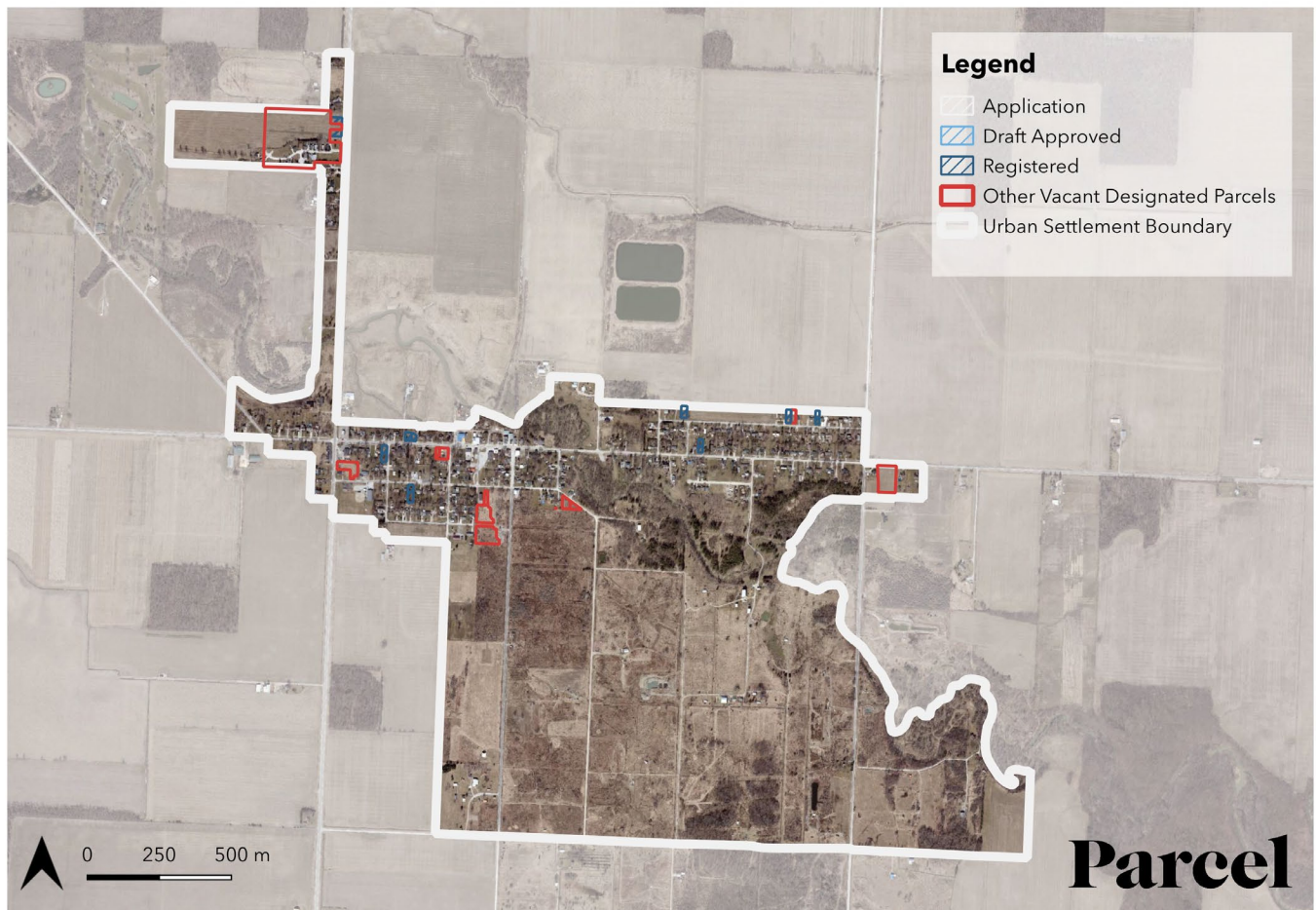


Figure B- 10

Petrolia Residential Supply Map

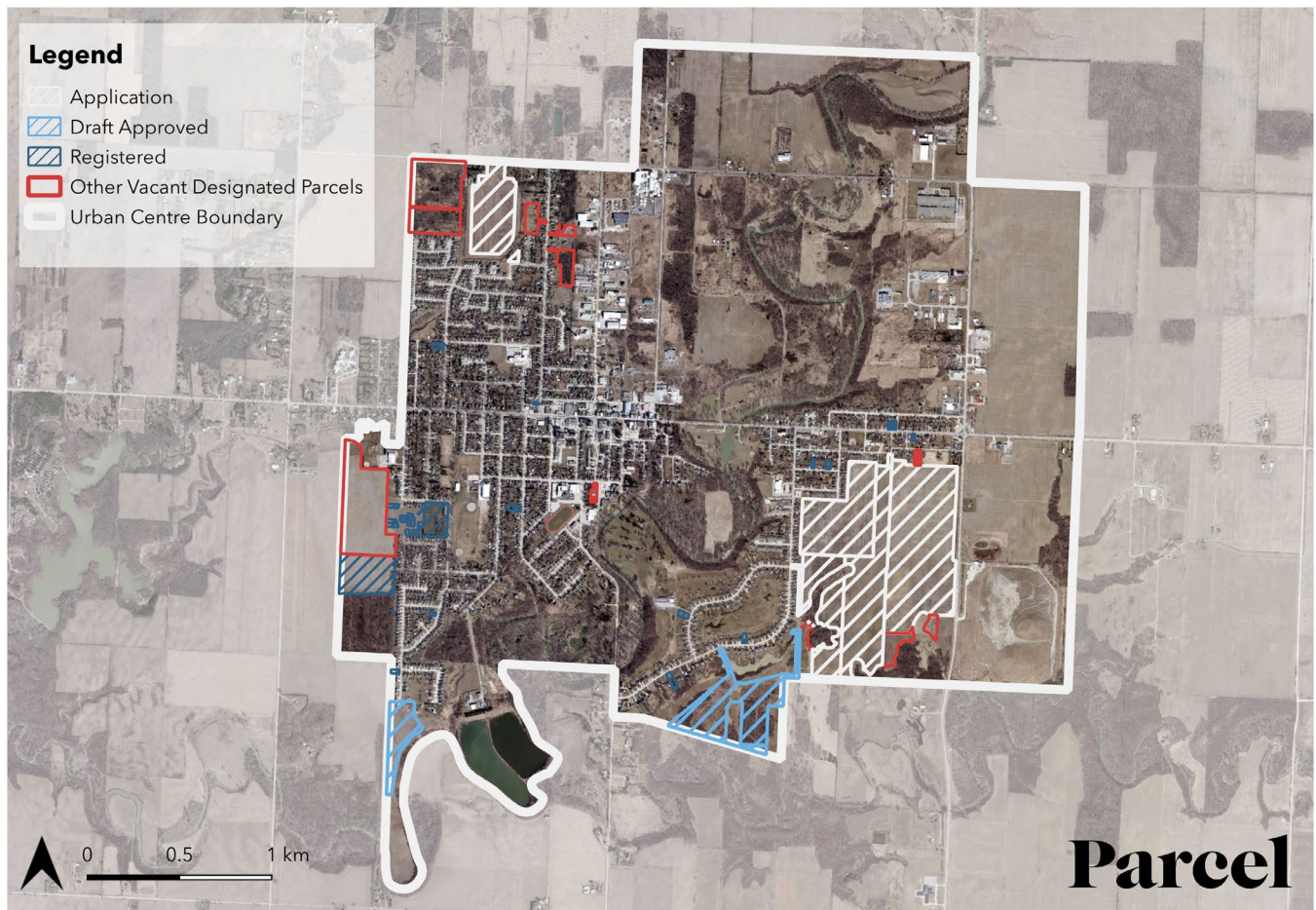


Figure B- 11

Blue Point / Sunset Acres Residential Supply Map



Figure B- 12

Camlachie Residential Supply Map

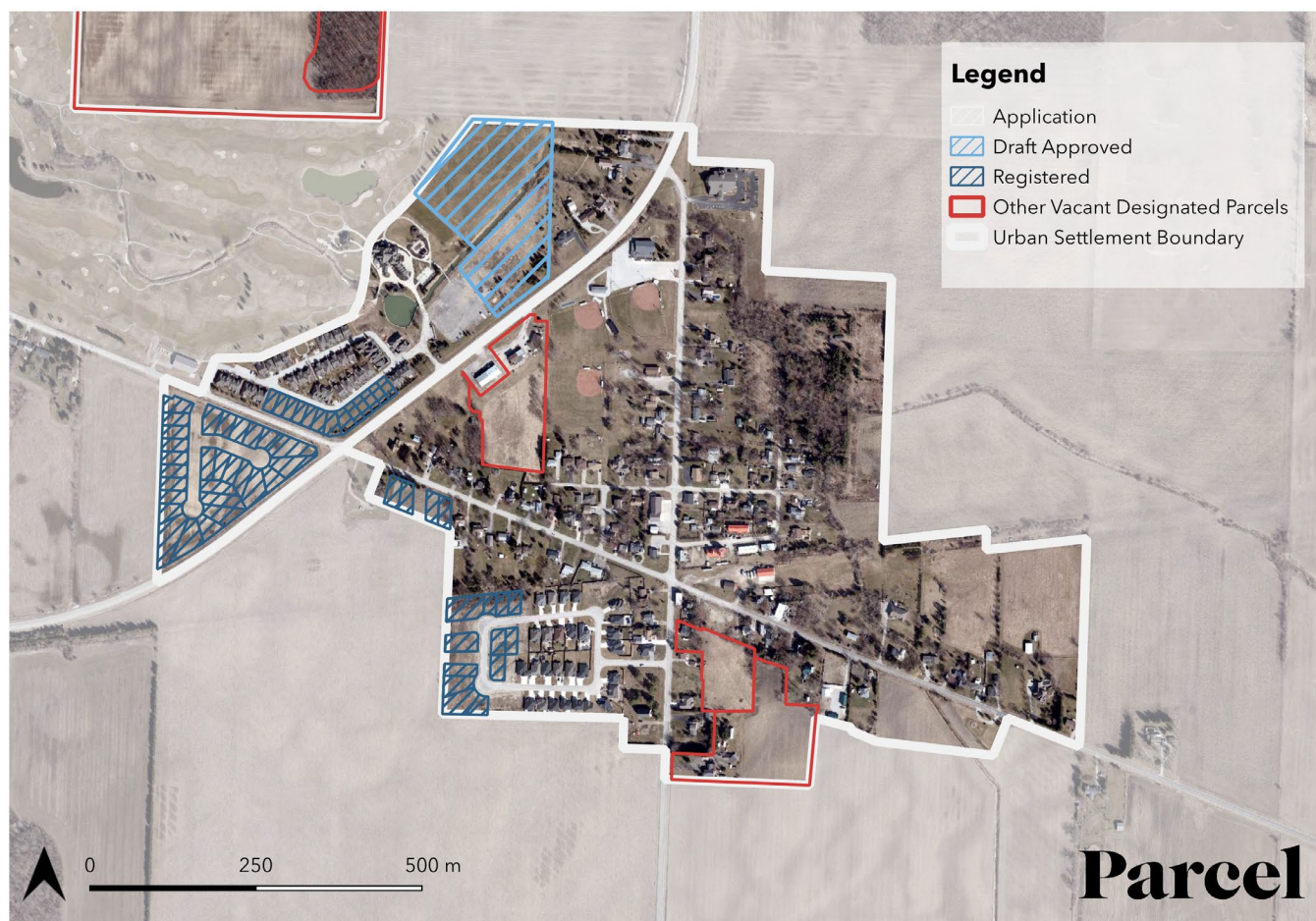


Figure B- 13
Errol Village Residential Supply Map



Figure B- 14

Lakeshore Development Area 1 Residential Supply Map

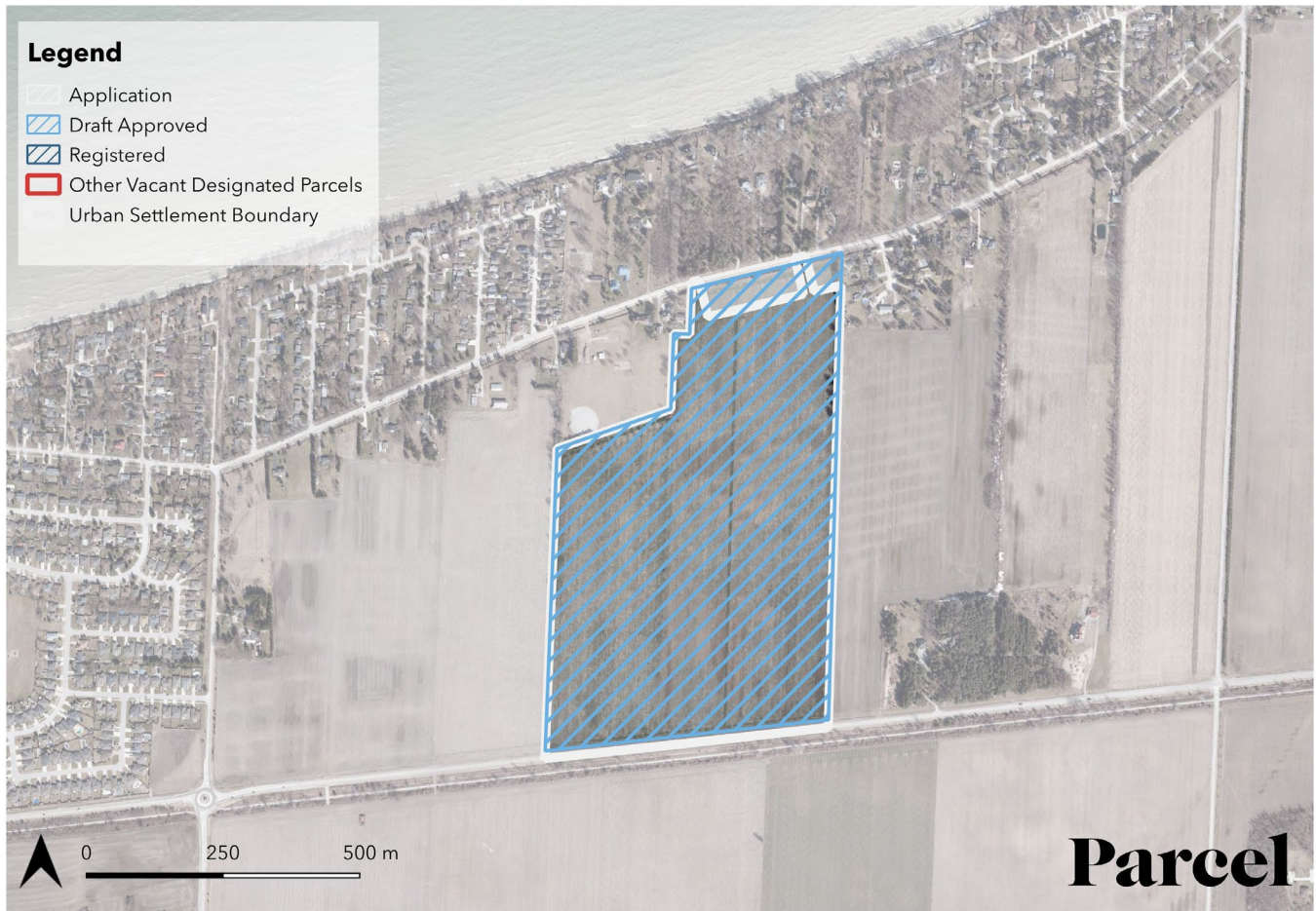


Figure B- 15

Lakeshore Development Area 2 Residential Supply Map



Figure B- 16

Lakeshore Development Area 3 Residential Supply Map



Figure B- 17

Wyoming Residential Supply Map

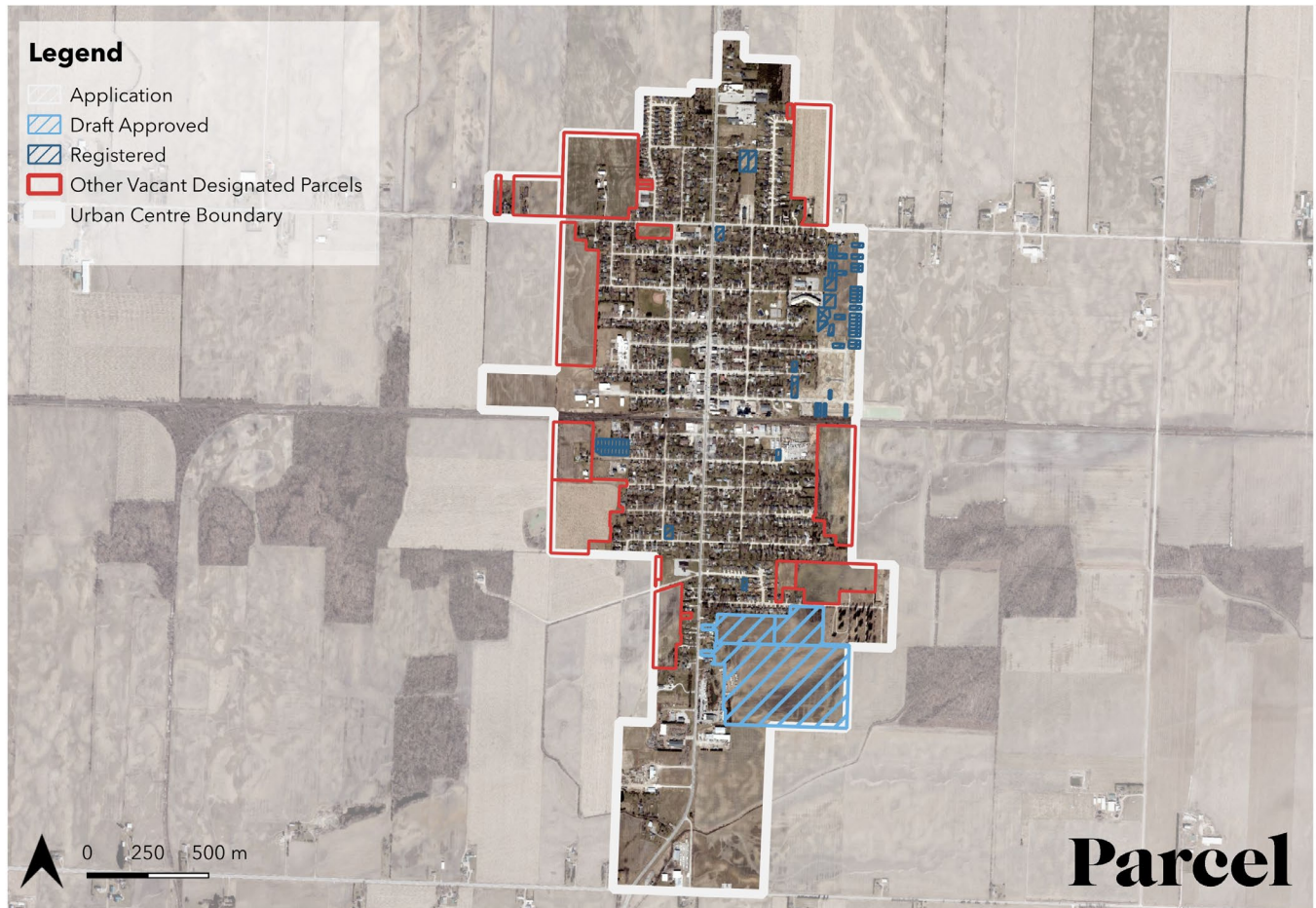


Figure B- 18

Point Edward Residential Supply Map



Figure B- 19

Brigden Residential Supply Map



Figure B- 20

Corunna Residential Supply Map

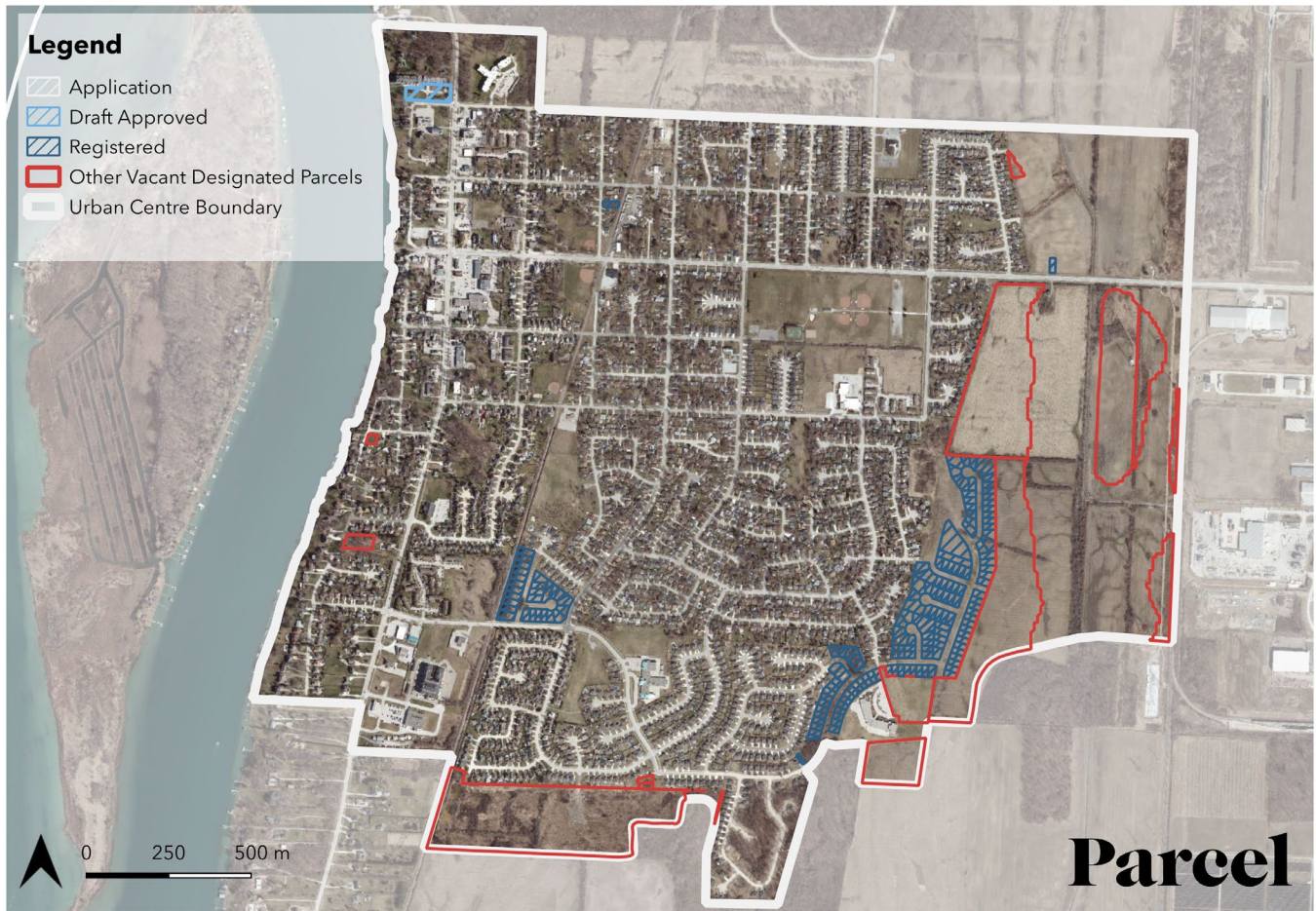


Figure B- 21

Courtright Residential Supply Map



Figure B- 22

Mooretown Residential Supply Map



Figure B- 23

Port Lambton Residential Supply Map



Figure B- 24

Sombra Residential Supply Map



Figure B- 25

Arkona Residential Supply Map

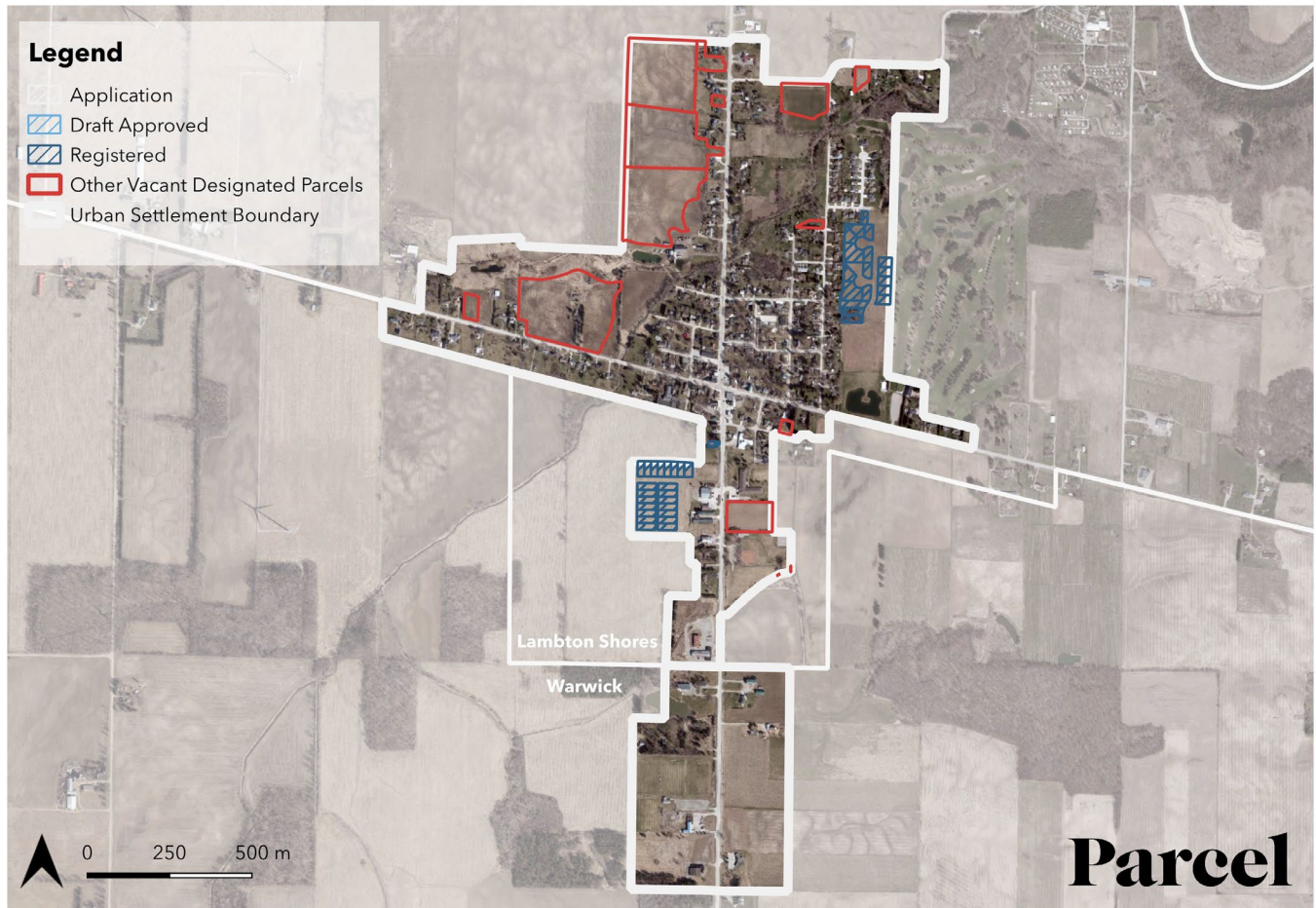
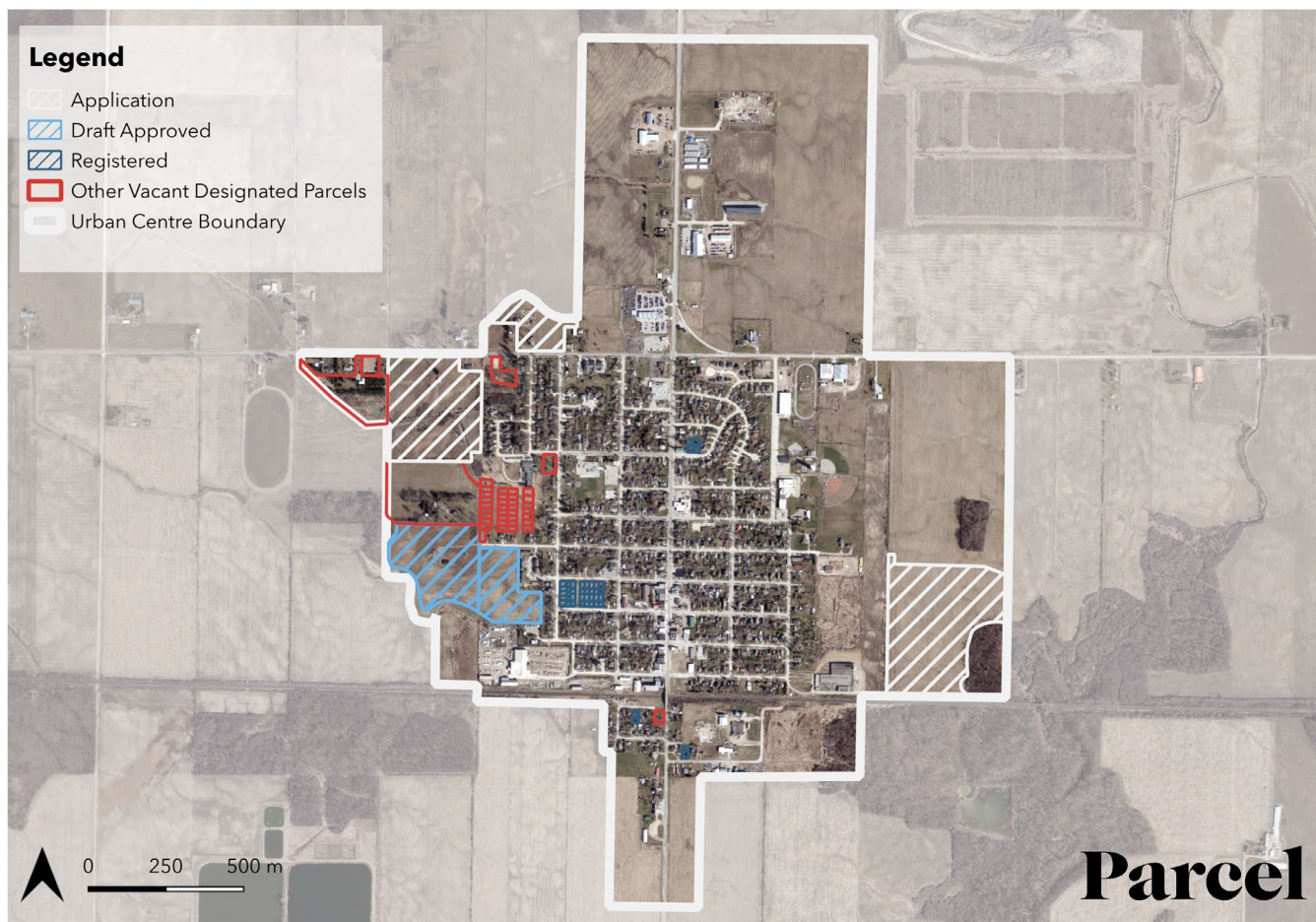
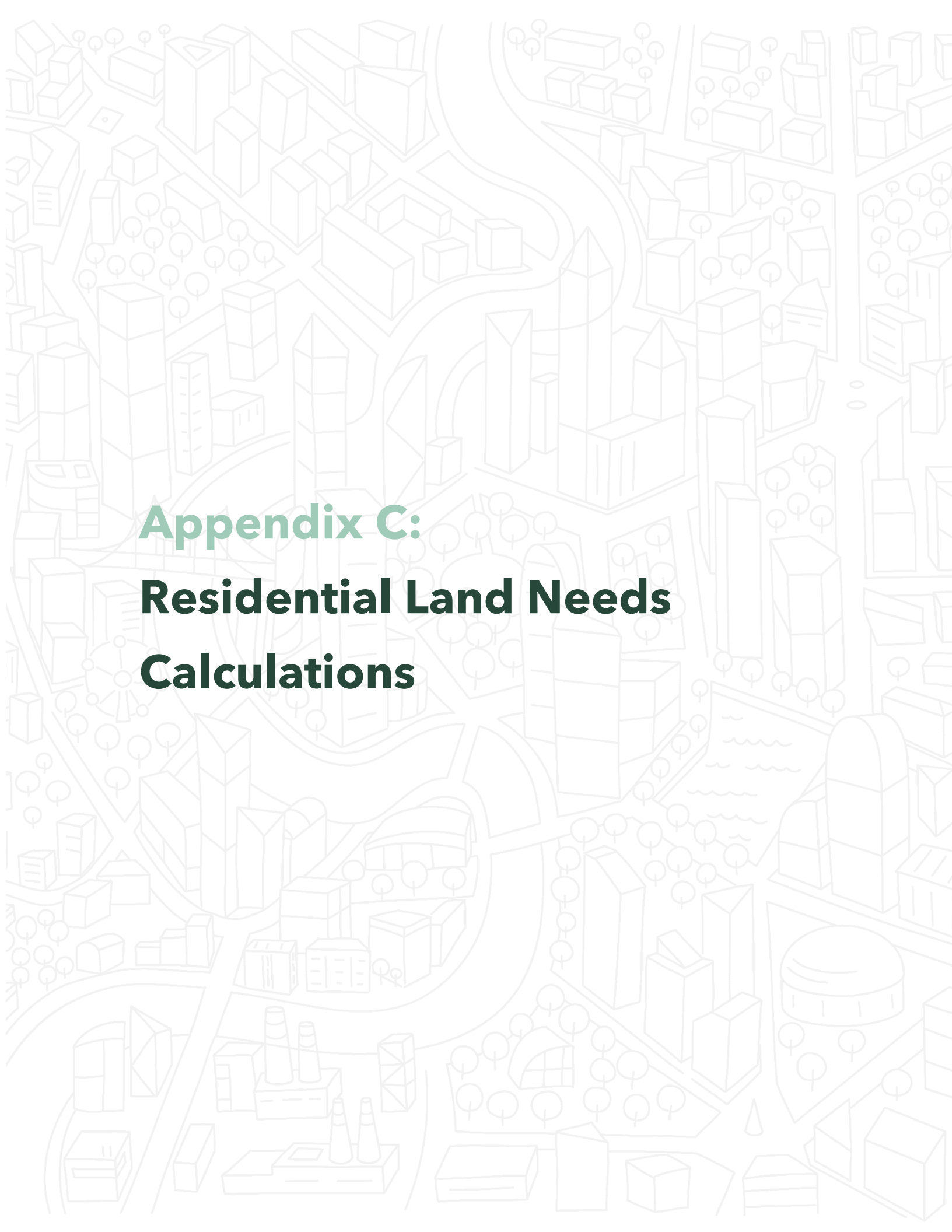


Figure B- 26

Watford Residential Supply Map





Appendix C: **Residential Land Needs** **Calculations**

Figure B- 27

Brooke-Alvinston Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	221	0	10	232
Total Household Growth 2021-2051	221	0	10	232
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				5%
New Dwellings Not Occupied by Usual Residents	12	0	0	12
Total Demand for New Housing - Mid-2021 to Mid-2051	234	0	10	244
Urban Centres and Urban Settlements				
Housing Demand	234	0	10	244
Intensification Units				
Share				15%
Demand	30	0	7	37
Intensification Supply				
Registered/Draft Approved/ Under Application	24	4	0	28
Vacant No Application	6	0	6	11
Supply Subtotal	30	4	6	39
Surplus / (Shortfall)	(0)	4	(1)	3
Greenfield Units				
Demand	204	0	3	207
Less Supply: Registered/Draft Approved/ Under Application	57	4	0	61
Surplus / (Shortfall)	(147)	4	(3)	(146)
Unit Density	15	30	50	
Net Land Need	9.8	0.0	0.1	9.8
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				19.7
Vacant No Application Lands				26.3
Gross Land Need				0.0

Figure B- 28

Dawn-Euphemia Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	166	0	0	166
Total Household Growth 2021-2051	166	0	0	166
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	166	0	0	166
Rural Area				
Rural Share				100%
Rural Units	166	0	0	166

Figure B- 29

Enniskillen Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	241	0	11	251
Total Household Growth 2021-2051	241	0	11	251
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	241	0	11	251
Urban Centres and Urban Settlements				
Housing Demand	241	0	11	251
Intensification Units				
Share				5%
Demand	9	0	4	13
Intensification Supply				
Registered/Draft Approved/ Under Application	6	0	0	6
Vacant No Application	1	0	5	5
Supply Subtotal	7	0	5	11
Surplus / (Shortfall)	(2)	0	1	(1)
Greenfield Units				
Demand	232	0	7	238
Less Supply: Registered/Draft Approved/ Under Application	2	0	0	2
Surplus / (Shortfall)	(230)	0	(7)	(236)
Unit Density	15	30	50	
Net Land Need	15.3	0.0	0.1	15.5
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				30.9
Vacant No Application Lands				19.7
Gross Land Need				11.2

Figure B- 30

Lambton Shores Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	1,091	91	108	1290
Total Household Growth 2021-2051	1,091	91	108	1,290
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				15%
New Dwellings Not Occupied by Usual Residents	228	0	0	228
Total Demand for New Housing - Mid-2021 to Mid-2051	1,318	91	108	1,517
Urban Centres and Urban Settlements				
Housing Demand	1,318	91	108	1,517
Intensification Units				
Share				5%
Demand	68	8	0	76
Intensification Supply				
Registered/Draft Approved/ Under Application	63	5	0	68
Vacant No Application	24	0	0	24
Supply Subtotal	87	5	0	92
Surplus / (Shortfall)	19	(3)	0	16
Greenfield Units				
Demand	1,250	83	108	1,441
Less Supply: Registered/Draft Approved/ Under Application	414	34	66	514
Surplus / (Shortfall)	(836)	(49)	(42)	(927)
Unit Density	15	30	50	
Net Land Need	55.8	1.6	0.8	58.2
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				116.4
Vacant No Application Lands				154.3
Gross Land Need				0.0

Figure B- 31

Oil Springs Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	49	0	40	89
Total Household Growth 2021-2051	49	0	40	89
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	49	0	40	89
Urban Centres and Urban Settlements				
Housing Demand	49	0	40	89
Intensification Units				
Share				15%
Demand	6	0	7	13
Intensification Supply				
Registered/Draft Approved/ Under Application	6	0	0	6
Vacant No Application	0	0	11	11
Supply Subtotal	6	0	11	17
Surplus / (Shortfall)	0	0	4	3
Greenfield Units				
Demand	43	0	33	76
Less Supply: Registered/Draft Approved/ Under Application	7	0	0	7
Surplus / (Shortfall)	(36)	0	(33)	(69)
Unit Density	15	30	50	
Net Land Need	2.4	0.0	0.7	3.0
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				6.1
Vacant No Application Lands				6.4
Gross Land Need				0.0

Figure B- 32

Petrolia Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	463	12	55	529
Total Household Growth 2021-2051	463	12	55	529
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	463	12	55	529
Urban Centres and Urban Settlements				
Housing Demand	463	12	55	529
Intensification Units				
Share				5%
Demand	15	0	11	26
Intensification Supply				
Registered/Draft Approved/ Under Application	13	0	0	13
Vacant No Application	2	0	0	2
Supply Subtotal	15	0	0	15
Surplus / (Shortfall)	0	0	(11)	(11)
Greenfield Units				
Demand	448	12	44	503
Less Supply: Registered/Draft Approved/ Under Application	961	162	0	1123
Surplus / (Shortfall)	513	150	(44)	620
Unit Density	15	30	50	
Net Land Need	0.0	0.0	0.9	0.9
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				1.8
Vacant No Application Lands				44.8
Gross Land Need				0.0

Figure B- 33

Plympton-Wyoming Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Building Permits	0	0	0	0
Housing Forecast 2021-2051	1,348	16	72	1,436
Total Household Growth 2020-2051	1,348	16	72	1,436
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	1,348	16	72	1,436
Urban Centres and Urban Settlements				
Housing Demand	1,348	16	72	1,436
Intensification Units				
Share				10%
Demand	144	0	0	144
Intensification Supply				
Registered/Draft Approved/ Under Application	169	0	0	169
Vacant No Application	1	0	0	1
Supply Subtotal	170	0	0	170
Surplus / (Shortfall)	26	0	0	26
Greenfield Units				
Demand	1,204	16	72	1,292
Less Supply: Registered/Draft Approved/ Under Application	810	108	0	918
Surplus / (Shortfall)	(394)	92	(72)	(374)
Unit Density	15	30	50	
Net Land Need	26.3	0.0	1.4	27.7
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				55.4
Vacant No Application Lands				179.7
Gross Land Need				0.0

Figure B- 34

Point Edward Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	65	0	0	65
Total Household Growth 2021-2051	65	0	0	65
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	65	0	0	65
Urban Centres and Urban Settlements				
Housing Demand	65	0	0	65
Intensification Units				
Share				100%
Demand	65	0	0	65
Intensification Supply				
Registered/Draft Approved/ Under Application	1	5	0	6
Vacant No Application	1	0	0	1
Supply Subtotal	2	5	0	7
Surplus / (Shortfall)	(63)	5	0	(58)
Greenfield Units				
Demand	0	0	0	0
Less Supply: Registered/Draft Approved/ Under Application	0	0	0	0
Surplus / (Shortfall)	0	0	0	0
Unit Density	15	30	50	
Net Land Need	0.0	0.0	0.0	0.0
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				0.0
Vacant No Application Lands				0.0
Gross Land Need				0.0

Figure B- 35

Sarnia Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	3,793	958	1,792	6,543
Total Household Growth 2021-2051	3,793	958	1,792	6,543
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	3,793	958	1,792	6,543
Urban Centres and Urban Settlements				
Housing Demand				
Market Demand	3,793	958	1,792	6,543
Unit Shift	-589	0	589	0
Adjusted Demand	3,204	958	2,381	6,543
Intensification Units				
Share				45%
Demand	489	74	2,381	2,944
Intensification Supply				
Supply Subtotal	489	74	1,980	2,543
Surplus / (Shortfall)	0	0	(401)	(401)
Greenfield Units				
Demand	2,715	884	0	3,599
Less Supply: Registered/Draft Approved/ Under Application	1919	309	0	2228
Surplus / (Shortfall)	-796	-575	0	-1,371
Unit Density	15	30	50	
Net Land Need	53.1	19.2	0.0	72.2
Net to Gross Ratio				50%
Gross Land Need				144.5

Figure B- 36

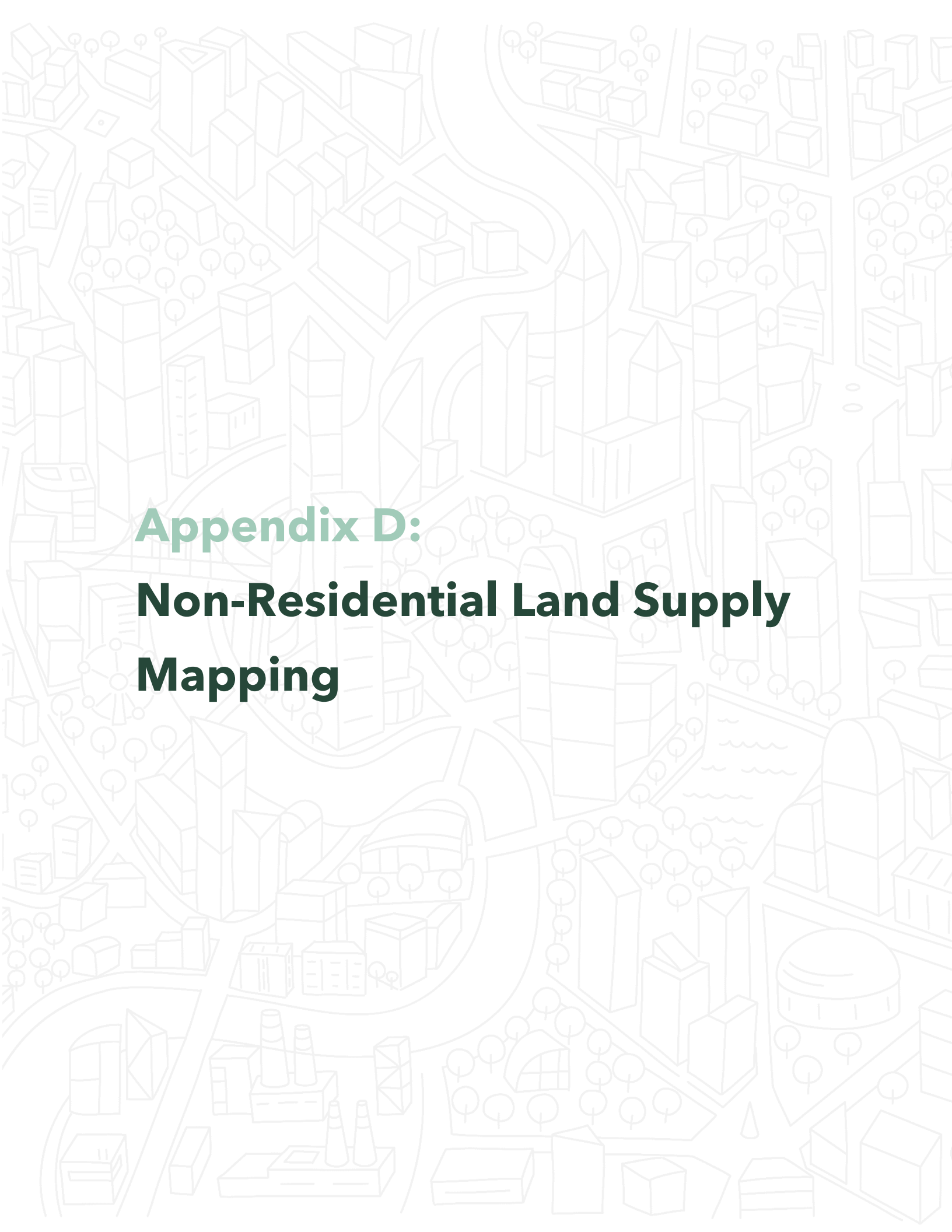
St. Clair Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	1,278	100	107	1484
Total Household Growth 2021-2051	1,278	100	107	1,484
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				15%
New Dwellings Not Occupied by Usual Residents	262	0	0	262
Total Demand for New Housing - Mid-2021 to Mid-2051	1,540	100	107	1,746
Urban Centres and Urban Settlements				
Housing Demand	1,540	100	107	1,746
Intensification Units				
Share				10%
Demand	113	55	7	175
Intensification Supply				
Registered/Draft Approved/ Under Application	106	114	0	220
Vacant No Application	7	0	7	14
Supply Subtotal	113	114	7	234
Surplus / (Shortfall)	(0)	59	(0)	59
Greenfield Units				
Demand	1,427	45	100	1,571
Less Supply: Registered/Draft Approved/ Under Application	338	0	0	338
Surplus / (Shortfall)	(1,089)	(45)	(100)	(1,233)
Unit Density	15	30	50	
Net Land Need	72.6	1.5	2.0	76.1
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				152.1
Vacant No Application Lands				77.5
Gross Land Need				74.6

Figure B- 37

Warwick Residential Land Needs

	Single/Semi Detached	Row	Apartment & Other	Total
Household Growth				
Housing Forecast 2021-2051	239	8	6	252
Total Household Growth 2021-2051	239	8	6	252
Unoccupied Dwellings				
Share of New Dwellings Not Occupied by Usual Residents				0%
New Dwellings Not Occupied by Usual Residents	0	0	0	0
Total Demand for New Housing - Mid-2021 to Mid-2051	239	8	6	252
Urban Centres and Urban Settlements				
Housing Demand	239	8	6	252
Intensification Units				
Share				10%
Demand	25	0	0	25
Intensification Supply				
Registered/Draft Approved/ Under Application	25	0	0	25
Vacant No Application	3	0	0	3
Supply Subtotal	28	0	0	28
Surplus / (Shortfall)	3	0	0	3
Greenfield Units				
Demand	214	8	6	227
Less Supply: Registered/Draft Approved/ Under Application	224	225	120	569
Surplus / (Shortfall)	10	217	114	342
Unit Density	15	30	50	
Net Land Need	0.0	0.0	0.0	0.0
Net to Gross Ratio				50%
Land Need (Prior to Vacant Lands Not Under Application)				0.0
Vacant No Application Lands				11.4
Gross Land Need				0.0



Appendix D: **Non-Residential Land Supply** **Mapping**

Figure D- 1

Alvinston Non-Residential Land Supply Map



Figure D- 2
Oil City Non-Residential Land Supply Map

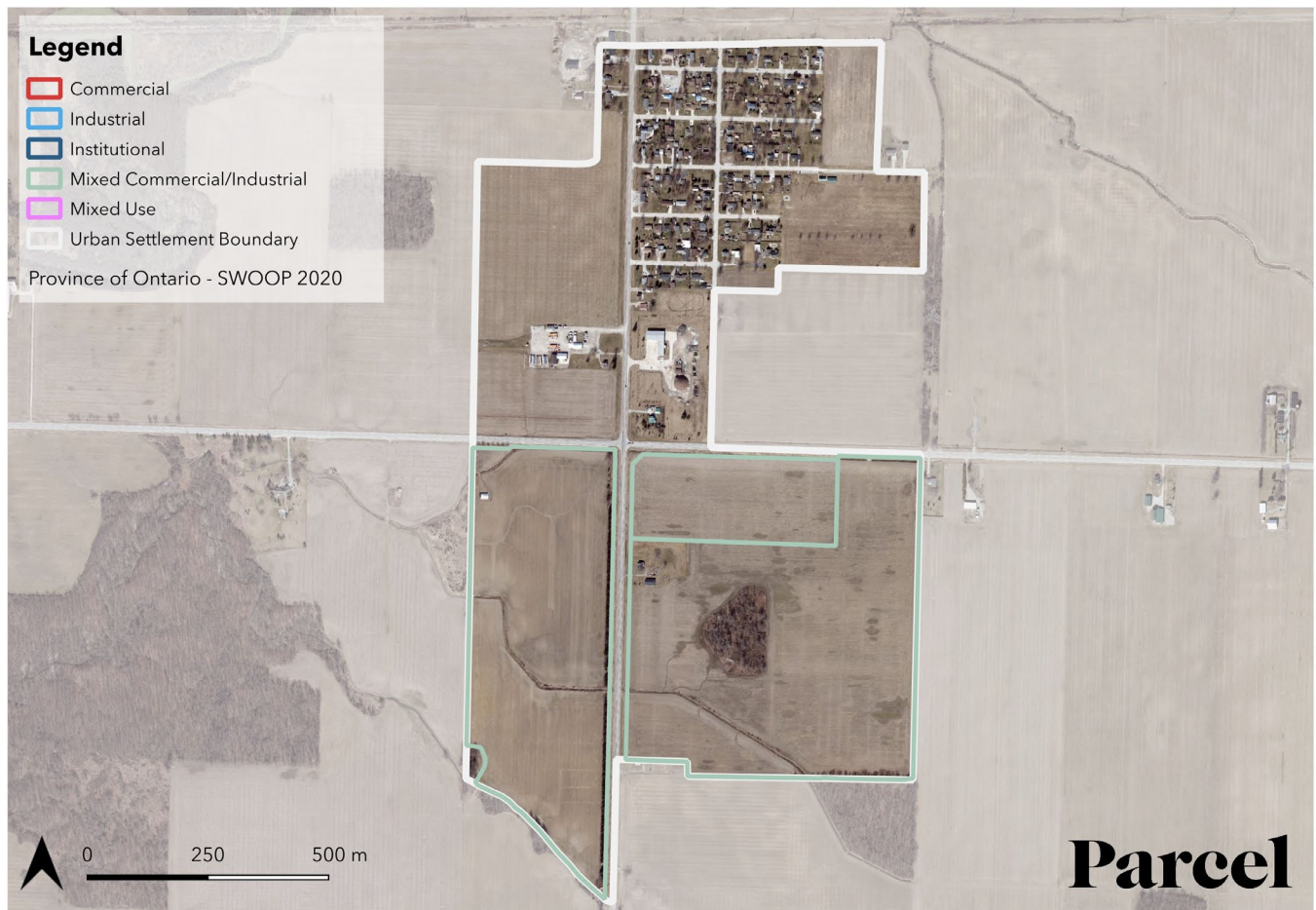


Figure D- 3

Forest Non-Residential Land Supply Map

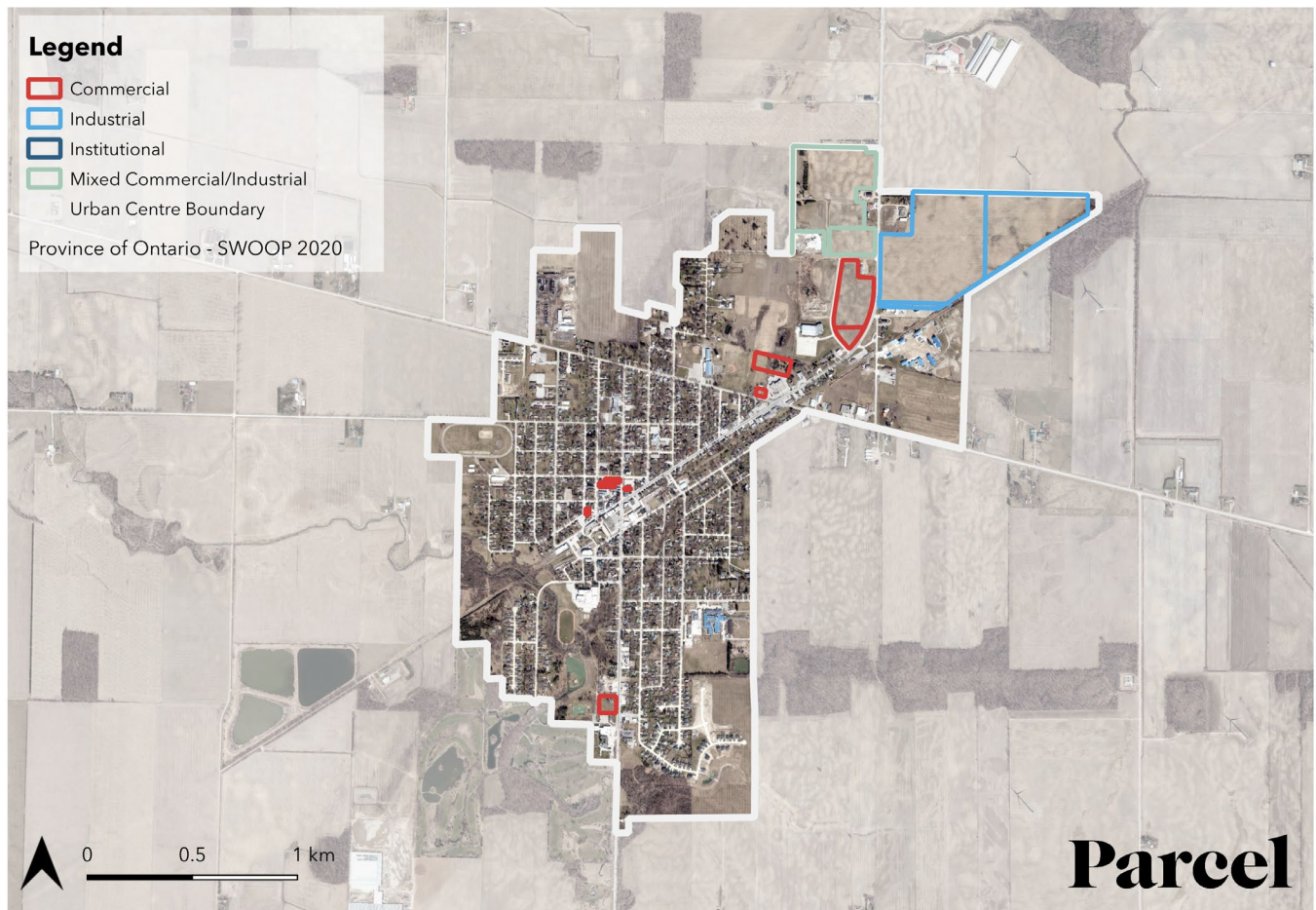


Figure D- 4
Grand Bend Non-Residential Land Supply Map



Figure D- 5
Highway 21 Non-Residential Land Supply Map



Figure D- 6
Ipperwash Non-Residential Land Supply Map



Figure D- 7
Port Franks Non-Residential Land Supply Map

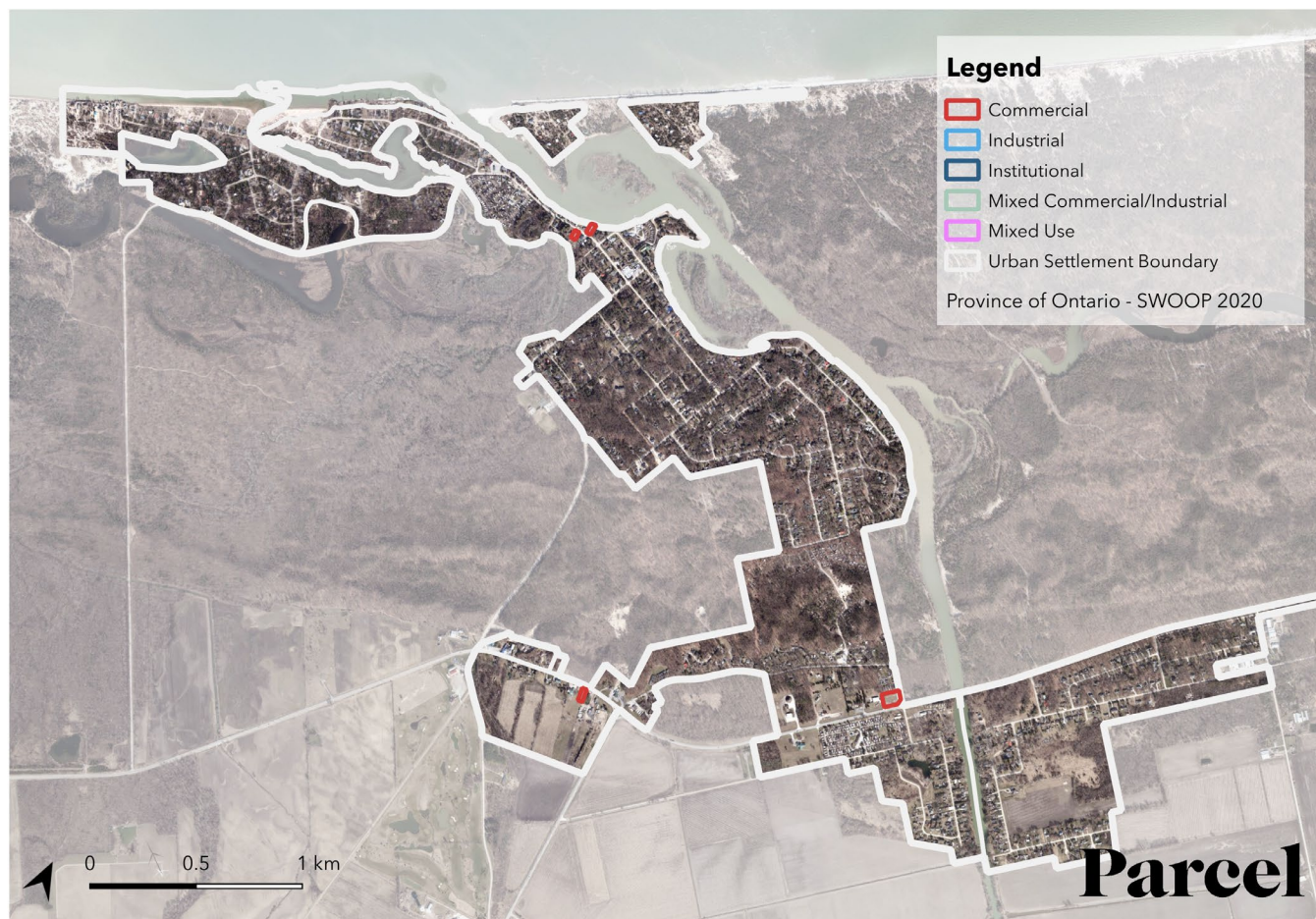


Figure D- 8
Thedford Non-Residential Land Supply Map



Figure D- 9
Oil Springs Non-Residential Land Supply Map

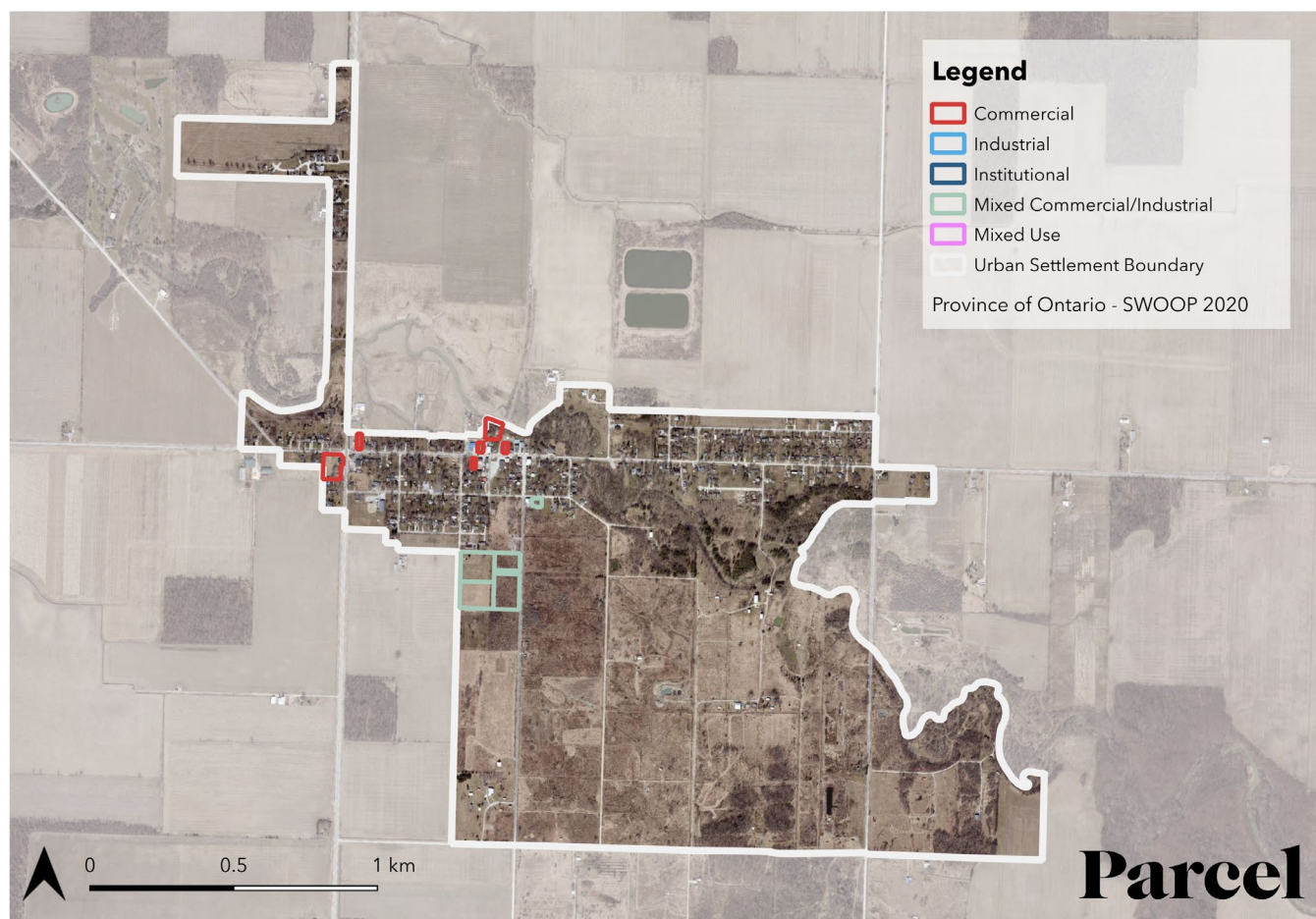


Figure D- 10

Petrolia Non-Residential Land Supply Map

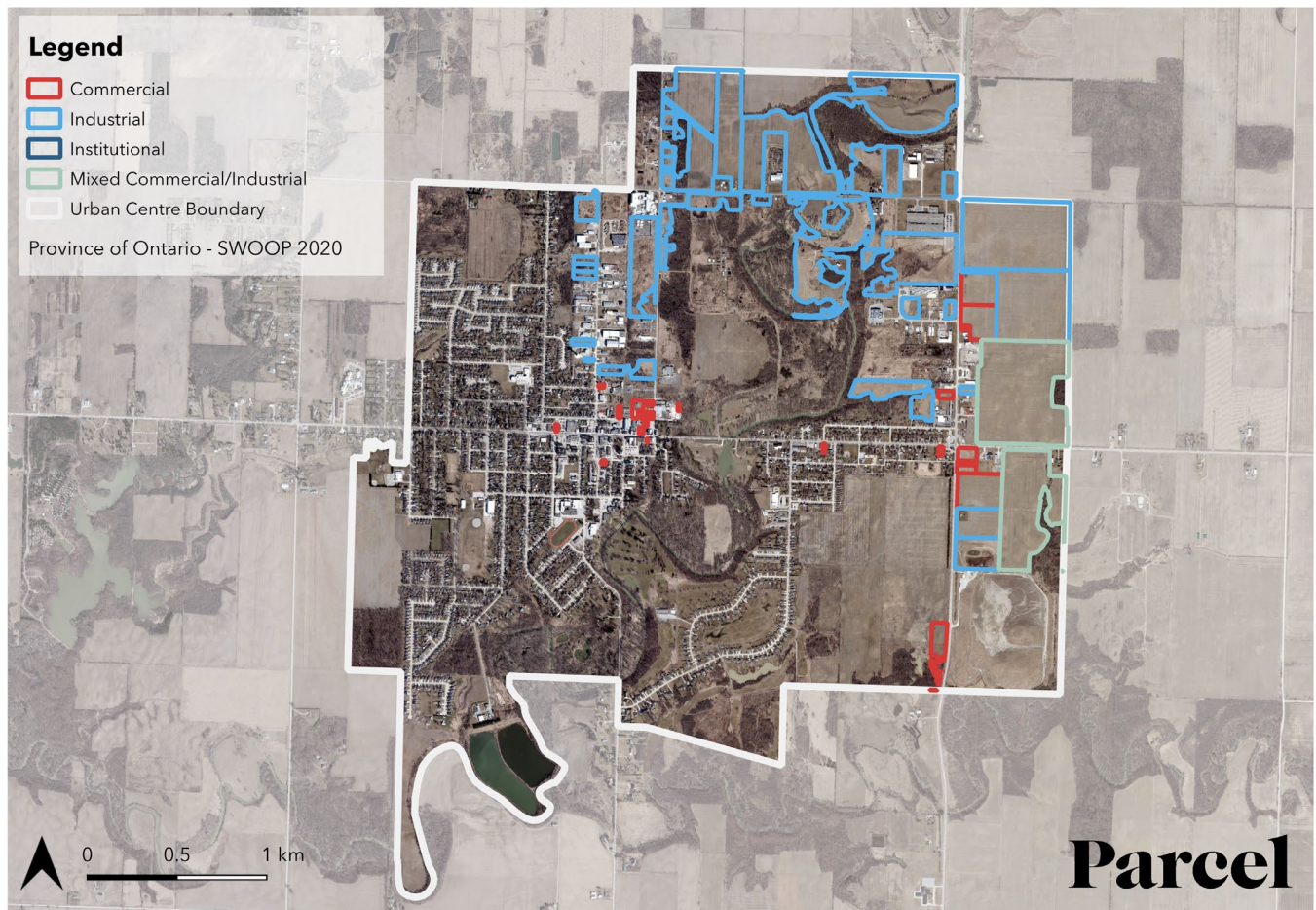


Figure D- 11

Wyoming Non-Residential Land Supply Map

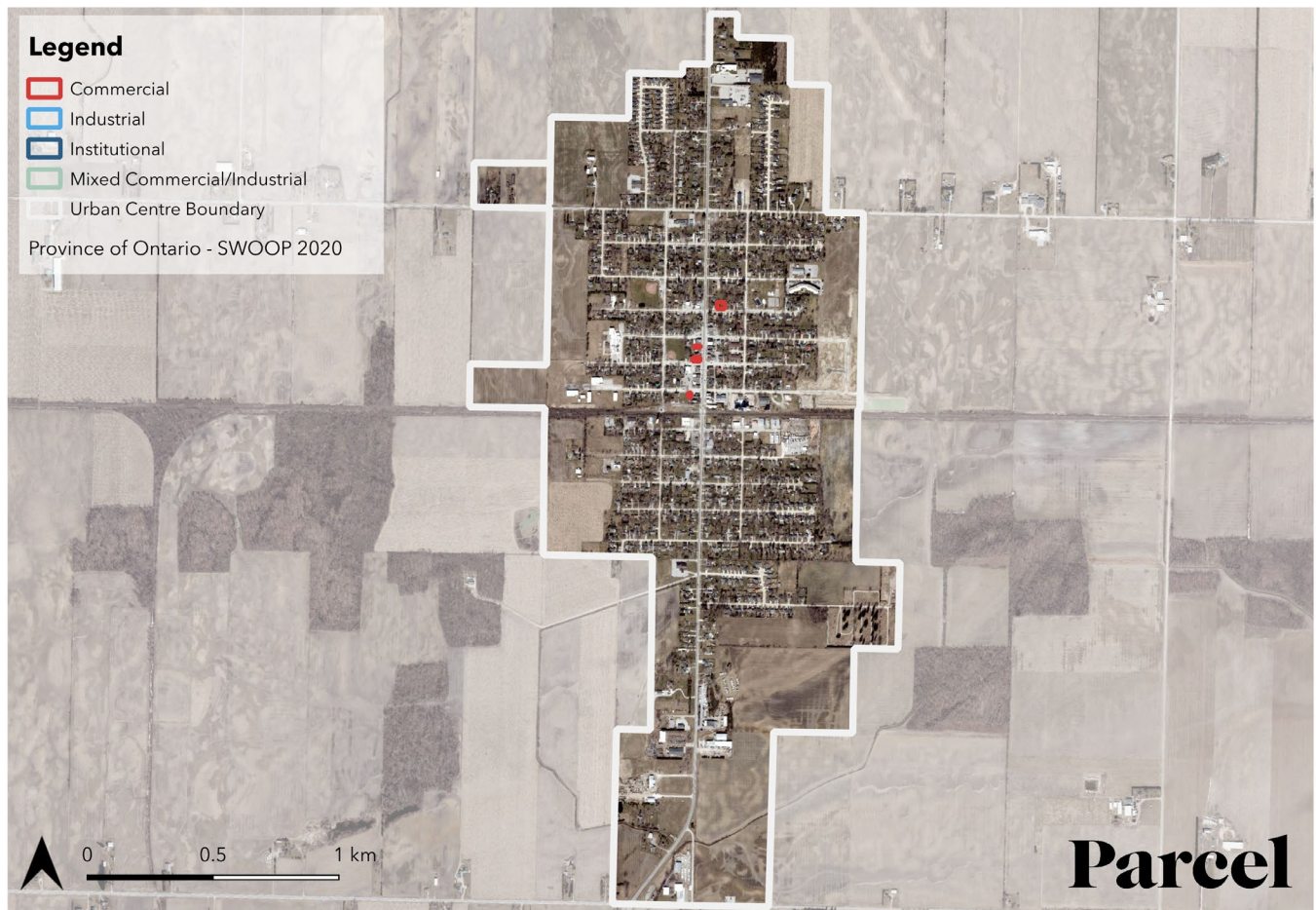


Figure D- 12

Point Edward Non-Residential Land Supply Map



Figure D- 13

Petrochemical Employment Area Land Supply Map

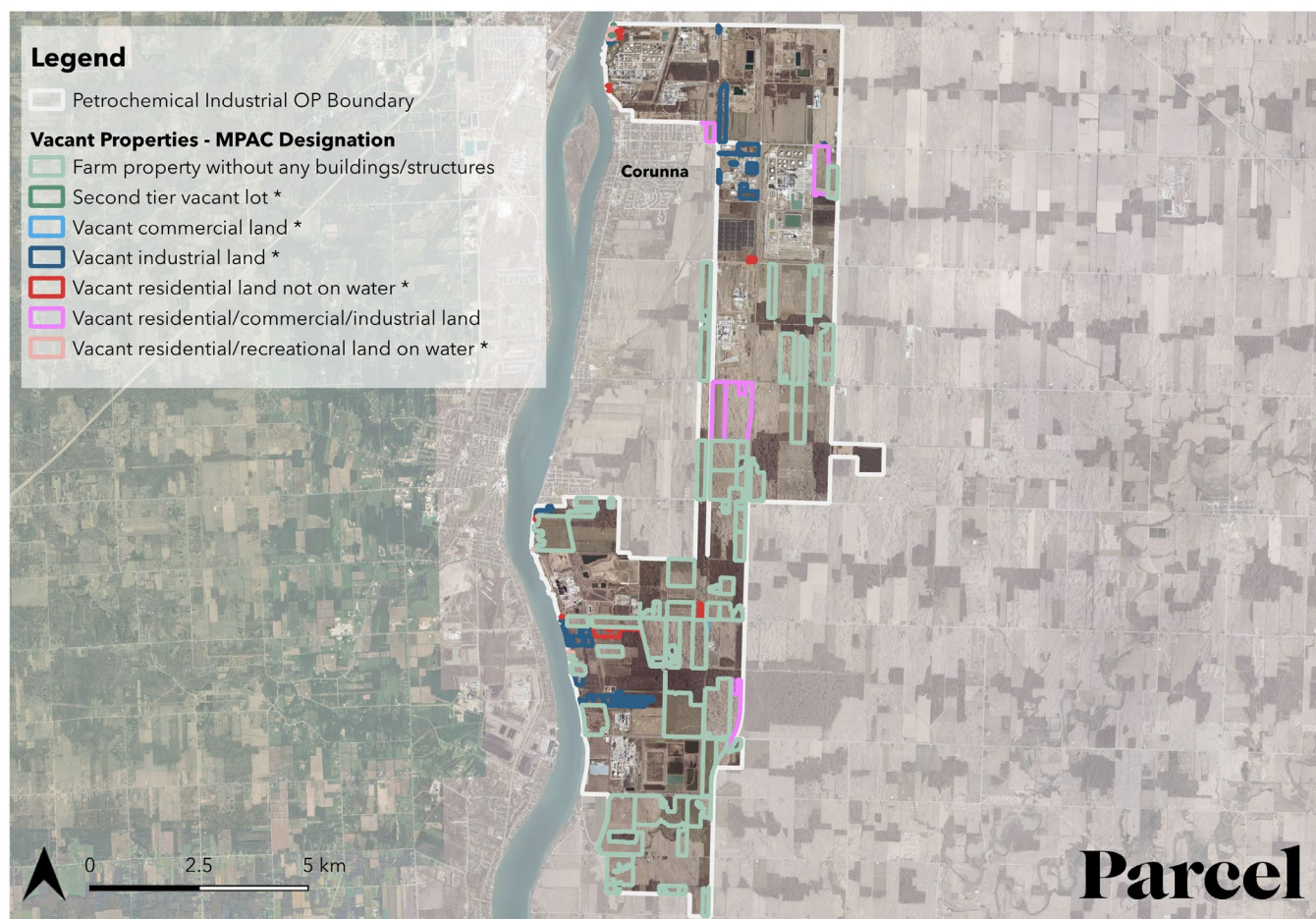


Figure D- 14

Brigden Non-Residential Land Supply Map



Figure D- 15

Corunna Non-Residential Land Supply Map

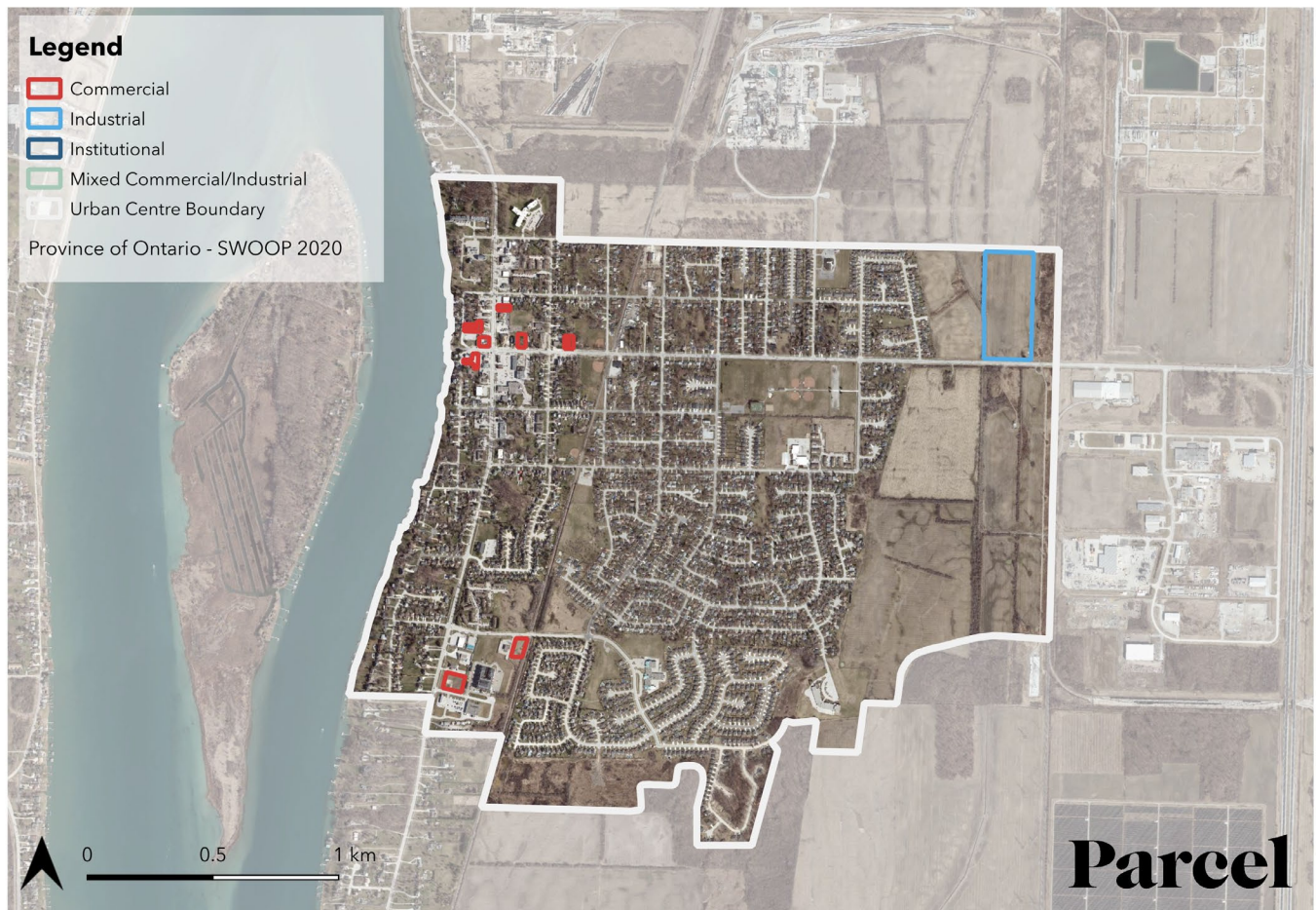


Figure D- 16
Courtright Non-Residential Land Supply Map



Figure D- 17

Port Lambton Non-Residential Land Supply Map

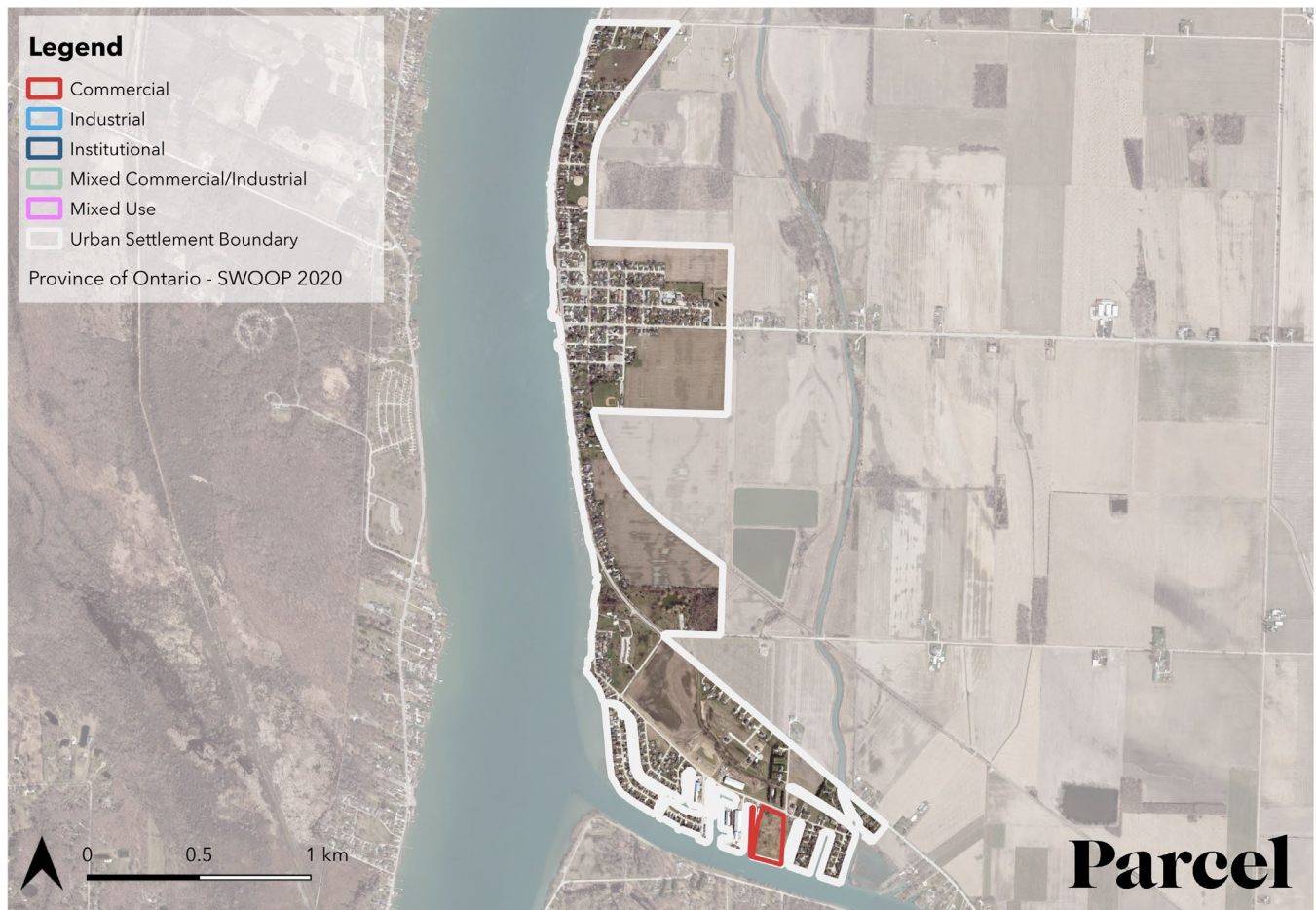


Figure D- 18

Sombra Non-Residential Land Supply Map



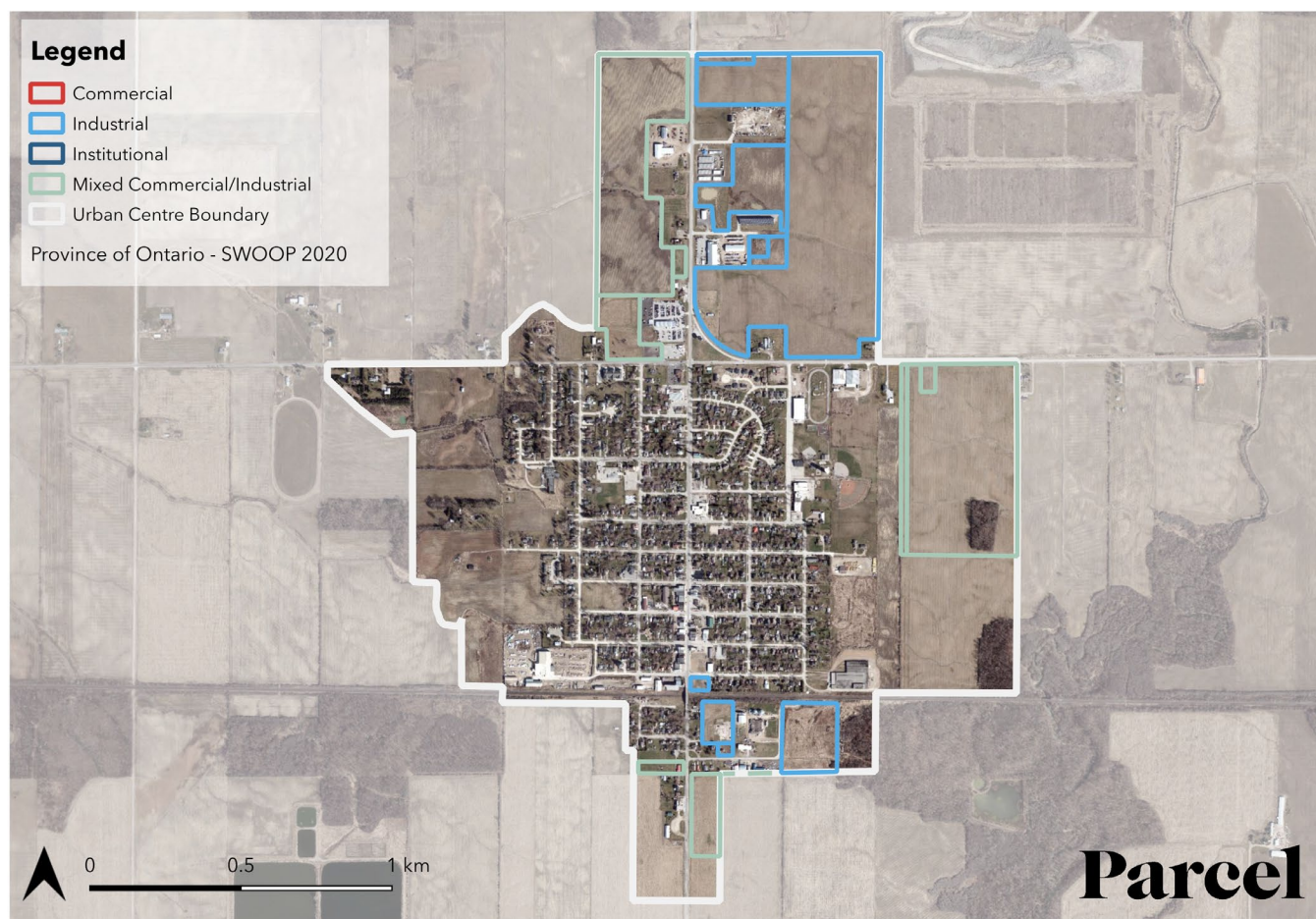
Figure D- 19

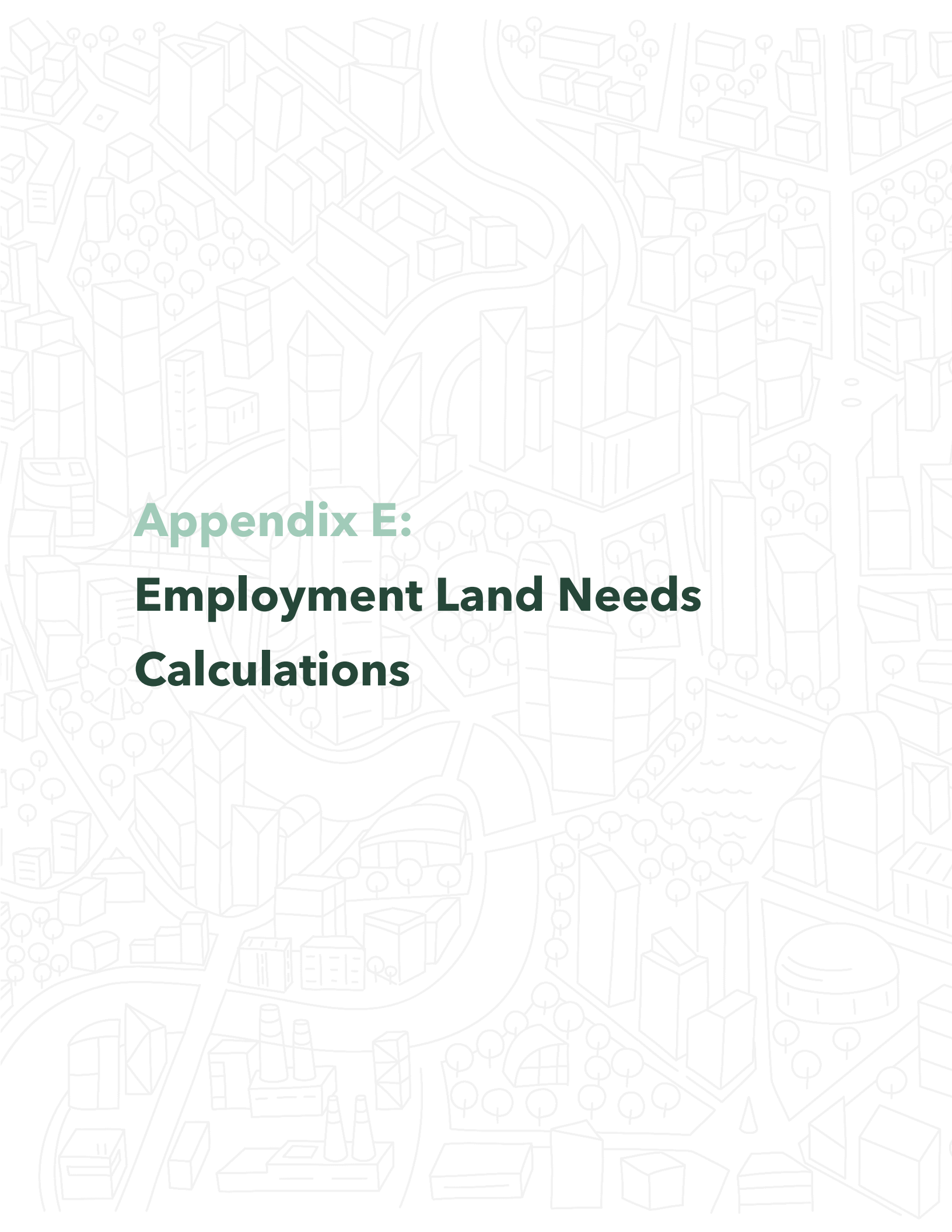
Arkona Non-Residential Land Supply Map



Figure D- 20

Watford Non-Residential Land Supply Map



The background of the page is a detailed, light green isometric line drawing of a city. It features a variety of building shapes, including skyscrapers, houses, and industrial structures with smokestacks. There are also winding roads, clusters of trees represented by small circles, and a body of water with wavy lines. The overall style is clean and modern.

Appendix E: **Employment Land Needs** **Calculations**

Figure E- 1
Employment Area Land Needs

	Brooke-Alvinston	Dawn-Euphemia	Enniskillen	Lambton Shores	Oil Springs	Petrolia	Plympton-Wyoming	Point Edward	Sarnia	St. Clair	Warwick
2021 Employment	65	145	100	575	30	1,020	400	385	5,970	2,690	310
2051 Employment	68	167	110	673	38	990	458	436	6,341	2,752	320
2021-2051 Employment Growth	3	22	10	98	8	-30	58	51	371	62	10
Work From Home Jobs (% of jobs)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
2021-2051 In-Person Employment Growth	3	21	10	93	8	-29	55	48	352	59	10
Employment Growth Accommodated Through Intensification	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
2021-2051 Employment Growth on Vacant Lands	3	19	9	84	7	-26	50	44	317	53	9
Employment Area Density (jobs per ha)	15	15	15	15	15	15	15	15	16	15	15
Employment Area Demand (ha)	0.2	1.3	0.6	5.6	0.5	0.0	3.3	2.9	19.8	3.5	0.6
Employment Land Supply (ha)	0.0	0.0	0.0	55.9	0.0	164.1	0.0	0.0	509.6	31.9	54.9
Long-Term Vacancy	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Employment Land Supply Less Long Term Vacancy (ha)	0.0	0.0	0.0	50.3	0.0	147.7	0.0	0.0	458.6	28.7	49.4
Net to Gross	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
Employment Land Supply (ha)	0.0	0.0	0.0	40.2	0.0	118.1	0.0	0.0	366.9	22.9	39.5
Surplus / (Shortfall) of Employment Area Lands	(0.2)	(1.3)	(0.6)	34.6	(0.5)	118.1	(3.3)	(2.9)	347.1	19.4	39.0

Figure E- 2
Commercial Land Needs

	Brooke-Alvinston	Dawn-Euphemia	Enniskillen	Lambton Shores	Oil Springs	Petrolia	Plympton-Wyoming	Point Edward	Sarnia	St. Clair	Warwick
2021 Employment	160	70	95	1,920	0	760	530	490	10,915	1,460	360
2051 Employment	157	84	121	2,465	0	843	746	533	12,752	1,710	382
2021-2051 Employment Growth	-3	14	26	545	0	83	216	43	1,837	250	22
Work From Home Jobs (% of jobs)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
2021-2051 In-Person Employment Growth	-3	12	22	463	0	71	184	37	1561	213	19
Employment Growth Accommodated Through Intensification	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
2021-2051 Employment Growth on Vacant Lands	-2	11	20	417	0	63	165	33	1405	191	17
Commercial Job Density (jobs per ha)	54	54	54	54	54	54	54	54	54	54	54
Demand for Commercial Lands (ha)	0.0	0.2	0.4	7.7	0.0	1.2	3.1	0.6	26.0	3.5	0.3
Land Supply (ha) ¹	28.7	0.0	62.1	38.4	5.2	62.4	0.2	1.7		5.2	56.2
Long-Term Vacancy	0%	0%	0%	0%	0%	0%	0%	0%		0%	0%
Commercial Land Supply (ha)	28.7	0.0	62.1	38.4	5.2	62.4	0.2	1.7		5.2	56.2
Net to Gross	20%	20%	20%	20%	20%	20%	20%	20%		20%	20%
Commercial Land Supply (ha)	22.9	0.0	49.7	30.7	4.2	49.9	0.1	1.4		4.2	45.0
Surplus / (Shortfall) of Commercial Lands	22.9	(0.2)	49.3	23.0	4.2	48.7	(2.9)	0.7		0.6	44.6

Figure E- 3
Institutional Land Needs

	Brooke-Alvinston	Dawn-Euphemia	Enniskillen	Lambton Shores	Oil Springs	Petrolia	Plympton-Wyoming	Point Edward	Sarnia	St. Clair	Warwick
2021 Employment	80	45	205	930	40	980	425	645	8,445	635	185
2051 Employment	106	60	315	1,564	59	1,421	696	893	12,391	916	250
2021-2051 Employment Growth	26	15	110	634	19	441	271	248	3,946	281	65
Work From Home Jobs (% of jobs)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
2021-2051 In-Person Employment Growth	25	14	105	602	18	419	257	236	3749	267	62
Employment Growth Accommodated Through Intensification	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
2021-2051 Employment Growth on Vacant Lands	22	13	94	542	16	377	232	212	3374	240	56
Institutional Density (jobs per ha)	31	31	31	31	31	31	31	31	31	31	31
Demand for Institutional Lands (ha)	0.7	0.4	3.0	17.5	0.5	12.2	7.5	6.8	108.8	7.8	1.8
Employment Land Supply (ha)	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.6		0.0	0.0
Long-Term Vacancy	0%	0%	0%	0%	0%	0%	0%	0%		0%	0%
Employment Land Supply Less Long Term Vacancy (ha)	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.6		0.0	0.0
Net to Gross	20%	20%	20%	20%	20%	20%	20%	20%		20%	20%
Employment Land Supply (ha)	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.5		0.0	0.0
Surplus / (Shortfall) of Employment Area Lands	(0.7)	(0.4)	(3.0)	(15.4)	(0.5)	(12.2)	(7.5)	(6.4)		(7.8)	(1.8)



Parcel

info@parceleconomics.com

416-869-8264

250 University Avenue, #217, Toronto, Ontario, M5H 3E5

